



Forschungsinstitut für biologischen Landbau  
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# Organic Agriculture Worldwide: Key results from the FiBL-IFOAM survey on organic agriculture worldwide 2013 Part 3: Organic agriculture in the regions 2011

Julia Lernoud and Helga Willer

Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, February 2013

# Organic Agriculture Worldwide: Key results from the FiBL-IFOAM survey on organic agriculture worldwide 2013: Part 3: Organic agriculture in the regions 2011

- › Data compiled by the Research Institute of Organic Agriculture FiBL, Frick, Switzerland, in cooperation with the International Federation of Organic Agriculture Movements IFOAM, based on national data sources and data from certifiers.
- › Supported by: Swiss State Secretariat of Economic Affairs (SECO) and NürnbergMesse, the organisers of the BioFach World Organic Trade Fair
- › Data as published February 2013 in FiBL & IFOAM (2013) The World of Organic Agriculture. Statistics and Emerging Trends 2013. Frick and Bonn
- › For updates check [www.organic-world.net](http://www.organic-world.net)
- › This presentation is available online at: <http://www.organic-world.net/yearbook-2013-presentations.html>
- › Texts and graphs: Julia Lernoud and Helga Willer; Research Institute of Organic Agriculture, FiBL, Frick, Switzerland
- › Contact: Helga Willer, Research Institute of Organic Agriculture, FiBL, Frick, Switzerland, [helga.willer@fibl.org](mailto:helga.willer@fibl.org)
- › © Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, February, 2013



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# The Global Survey on Organic Agriculture: Supporters

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



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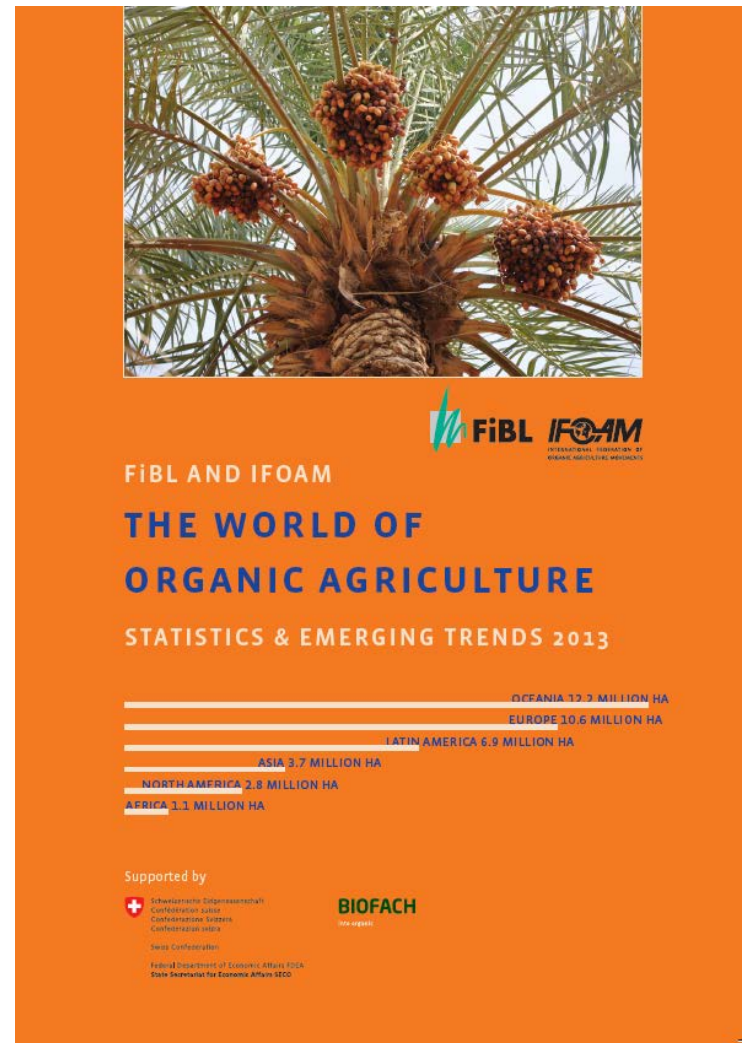
- › Nürnberg Messe, the organizers of the BioFach World Organic Trade Fair



- › 200 experts from all parts of the world contributed to the FiBL-IFOAM survey 2013.

# The World of Organic Agriculture 2013

- › The 14th edition of 'The World of Organic Agriculture', was published by FiBL and IFOAM in February 2013.\*
- › Contents:
  - › Results of the survey on organic agriculture worldwide;
  - › Organic agriculture in the regions and country reports;
  - › Albania, Australia, Canada, Hungary, Kosovo, Montenegro, the Pacific Islands, Saudi Arabia, Serbia and The United States of America.
  - › Chapters on the global market, standards & legislations, voluntary standards, PGS and European market
  - › Numerous tables and graphs.
  - › The book can be ordered via IFOAM.org and shop.FiBL.org.
  - › \*Willer, H, Lernoud, J, and Kilcher, L. (2013) The World of Organic Agriculture. Statistics and Emerging Trends 2013. FiBL, Frick, and, IFOAM, Bonn



# Website www.organic-world.net

- › Detailed statistics in excel format (in progress)
- › Graphs & Maps
- › Data revisions
- › News and background information

## Organic World

Global organic farming statistics and news



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### The World of Organic Agriculture 2013

The 14th edition of "The World of Organic Agriculture" will be launched at BioFach 2013 at NürnbergMesse, Nuremberg, Germany. The presentation will be on February 13, 2013, from 2 to 2.45 pm, room St. Ptersburg.

The 14th edition of The World of Organic Agriculture documents recent developments in global organic agriculture. It includes contributions from representatives of the organic sector from throughout the world and provides comprehensive organic farming statistics that cover surface area under organic management, specific information about land use in organic systems, numbers of farms and other operator types as well as selected market data.

The book also contains information on the global market for organic food, the latest developments in organic certification, information on standards and regulations as well as insights into current and emerging trends for organic agriculture in Africa, Asia, Europe, Latin America, North America and Oceania.

In addition, the volume contains a number of country reports: Albania, Australia, Canada, Hungary, Kosovo, Montenegro, Serbia, Pacific Islands, and the United States.

### The World of Organic Agriculture 2013



FiBL and IFOAM

THE WORLD OF ORGANIC AGRICULTURE

STATISTICS & EMERGING TRENDS 2013

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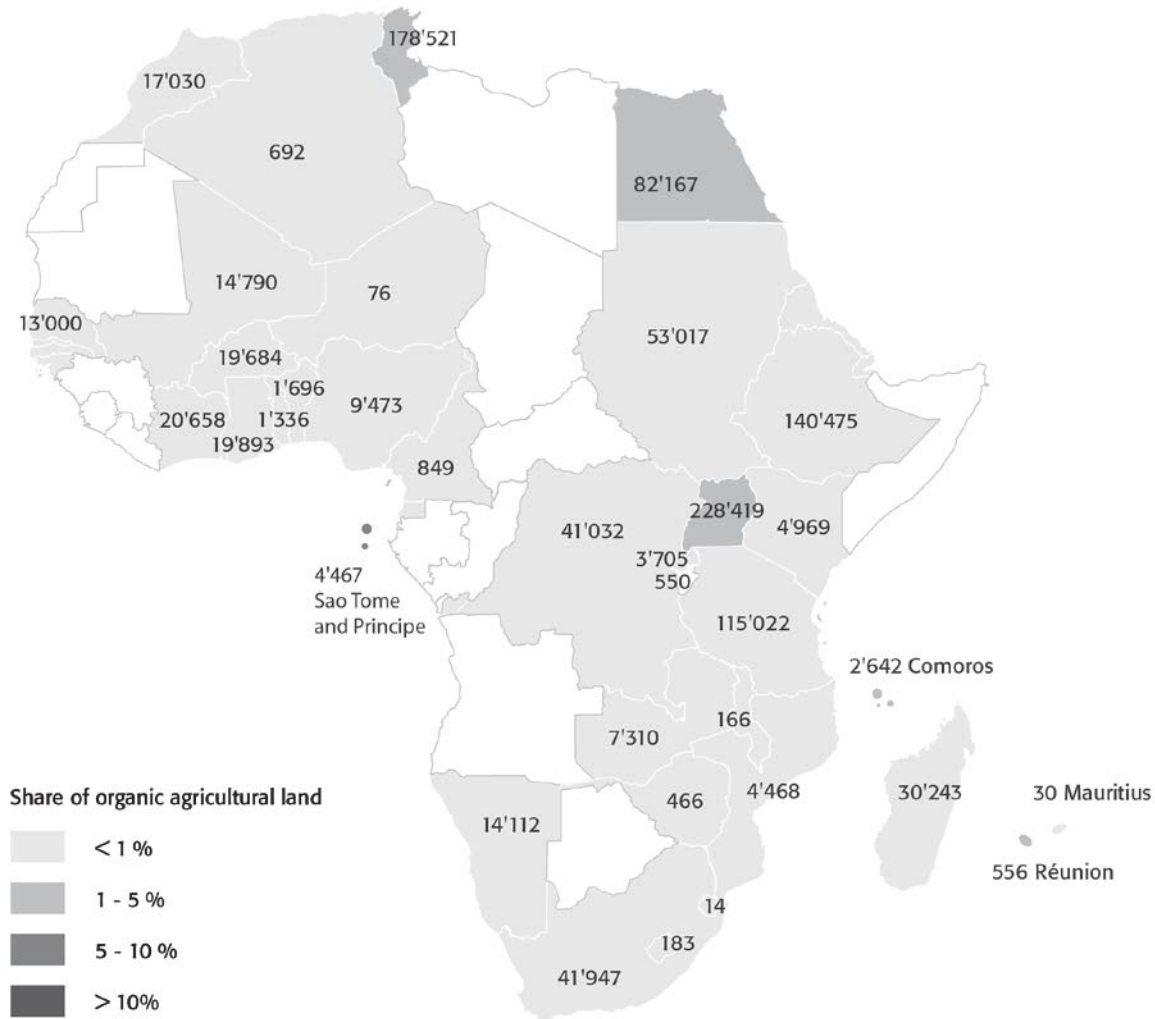
# About this presentation

- › There are 3 presentations summarizing the key results of the FiBL-IFOAM survey on organic agriculture worldwide 2013 (data 2011). Apart from the global data, key results on crop and on regional data are presented.
- › More information is available at the password area of [www.organic-world.net](http://www.organic-world.net)
- › The following three presentations are available at <http://www.organic-world.net/yearbook-2013-presentations.html>:
  - › Part 1: Global data 2011 and survey background
  - › Part 2: Land use and key crops in organic agriculture 2011
  - › Part 3: Organic agriculture in the regions 2011

# The 14th Survey on organic agriculture worldwide

- › The 14th survey on organic agriculture worldwide was carried out by the Research Institute of Organic Agriculture FiBL in cooperation with the International Federation of Organic Agriculture Movements (IFOAM) and further partners.
- › The survey was carried out between July 2012 and February 2013.
- › Data were received from 162 countries.
- › New countries included: Dominica, Guinea Bissau, Kosovo and Tonga.
- › Updated data on area and producers were available for 135 countries.,
- › Data were provided by almost 200 country experts (representatives from NGOs, certification bodies, governments, researchers).
- › The following data were collected: Area data (including land use and crop details); Producers, other operator types; Domestic market values; Export and imports data; Livestock data (animal heads and production tones);
- › The results are published in the yearbook “The World of Organic Agriculture 2013” and at [www.organic-world.net](http://www.organic-world.net).

# Africa: Organic agricultural land by country 2011

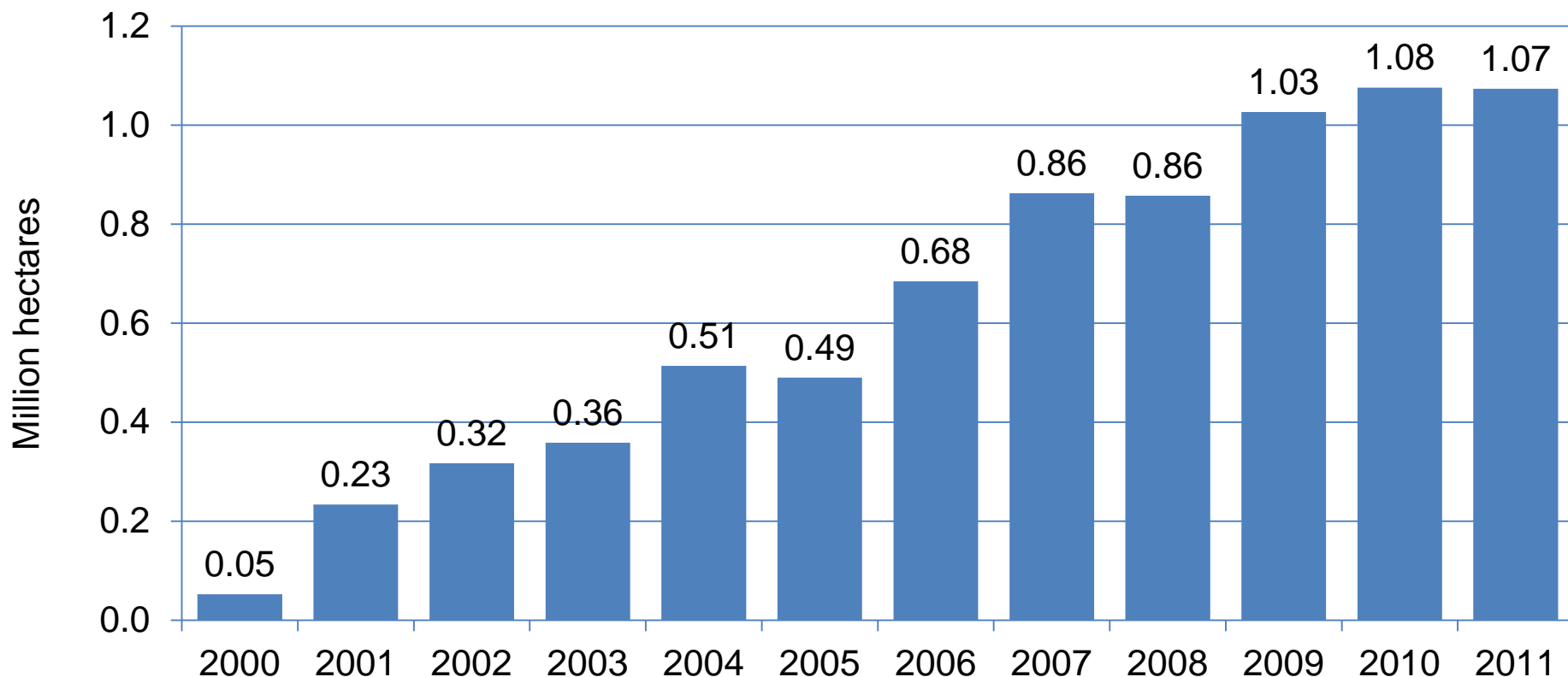




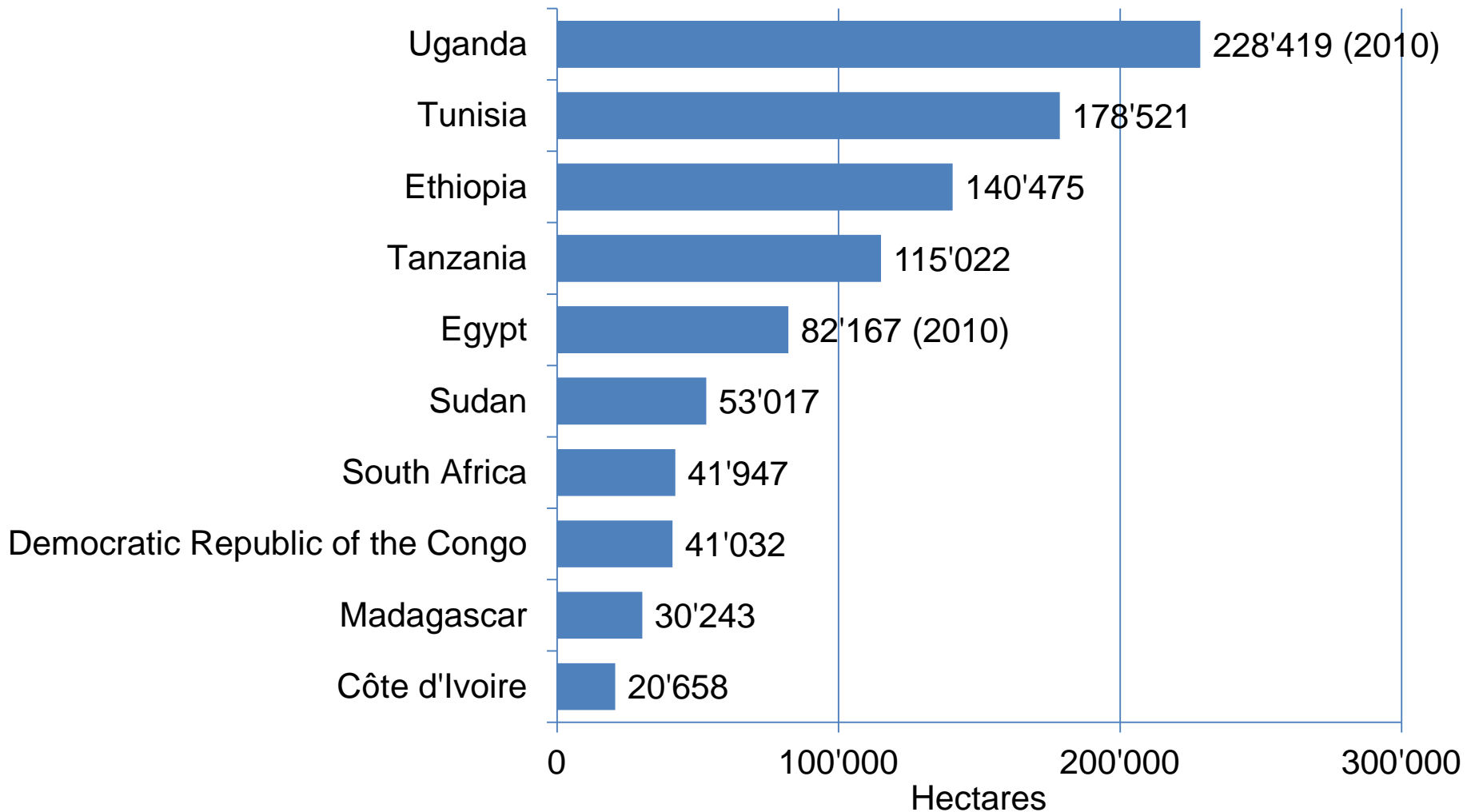
# Organic agriculture in Africa 2011

- › In Africa, there were 1.1 million hectares of certified organic agricultural land (data 2011).
- › This constitutes about three percent of the world's organic agricultural land.
- › Almost 550'000 producers were reported.
- › The countries with the most organic land are Uganda (228'419 hectares), Tunisia (178'521 hectares), and Ethiopia (140'475 hectares).
- › The highest shares of organic land are in Sao Tome and Prince (8 percent), Egypt (2.2 percent), and Tunisia (1.9 percent).
- › The majority of certified organic produce in Africa is destined for export markets.
- › The European Union, as the major recipient of these exports, is Africa's largest market for agricultural produce.

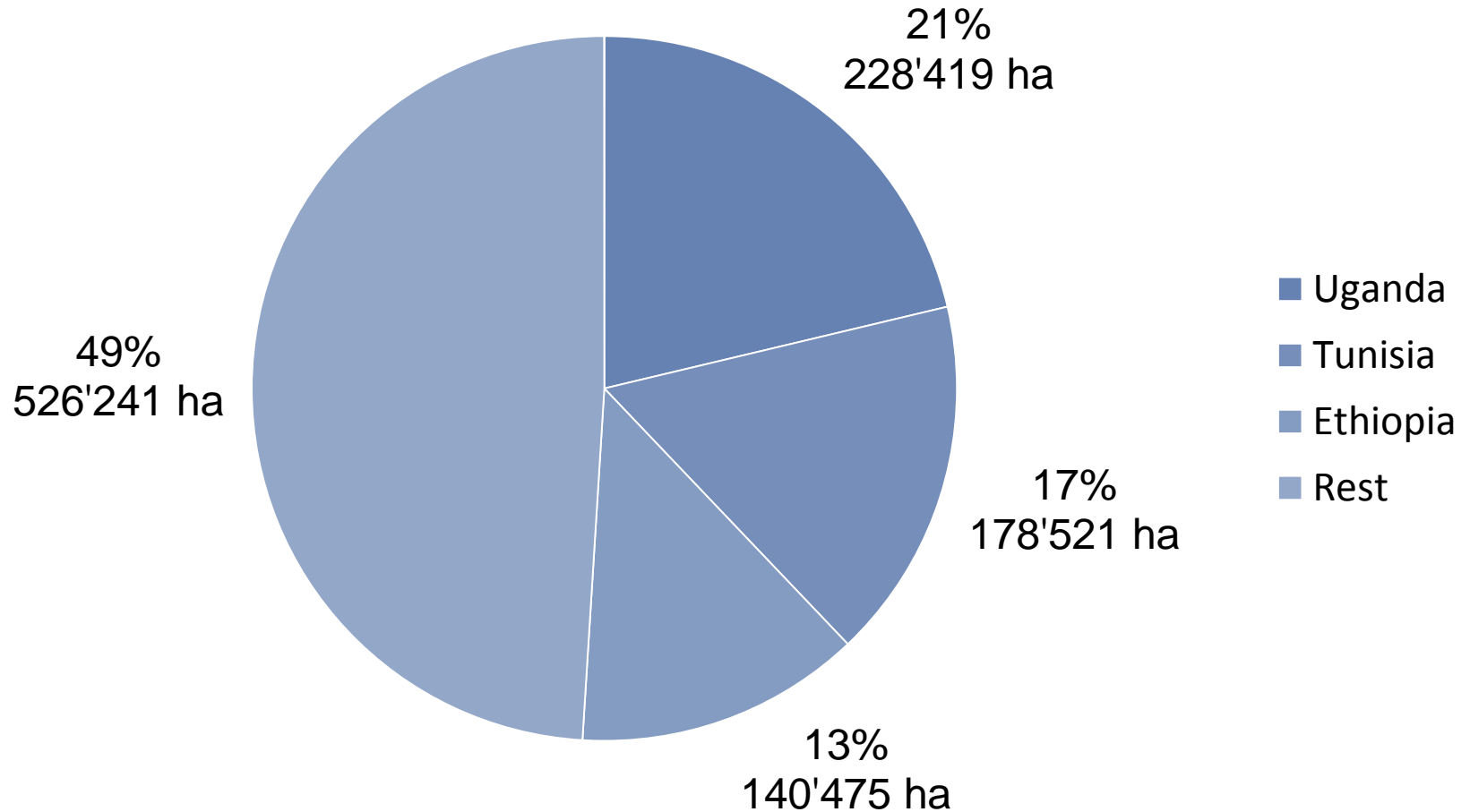
# Africa: Development of organic agricultural land 2000-2011



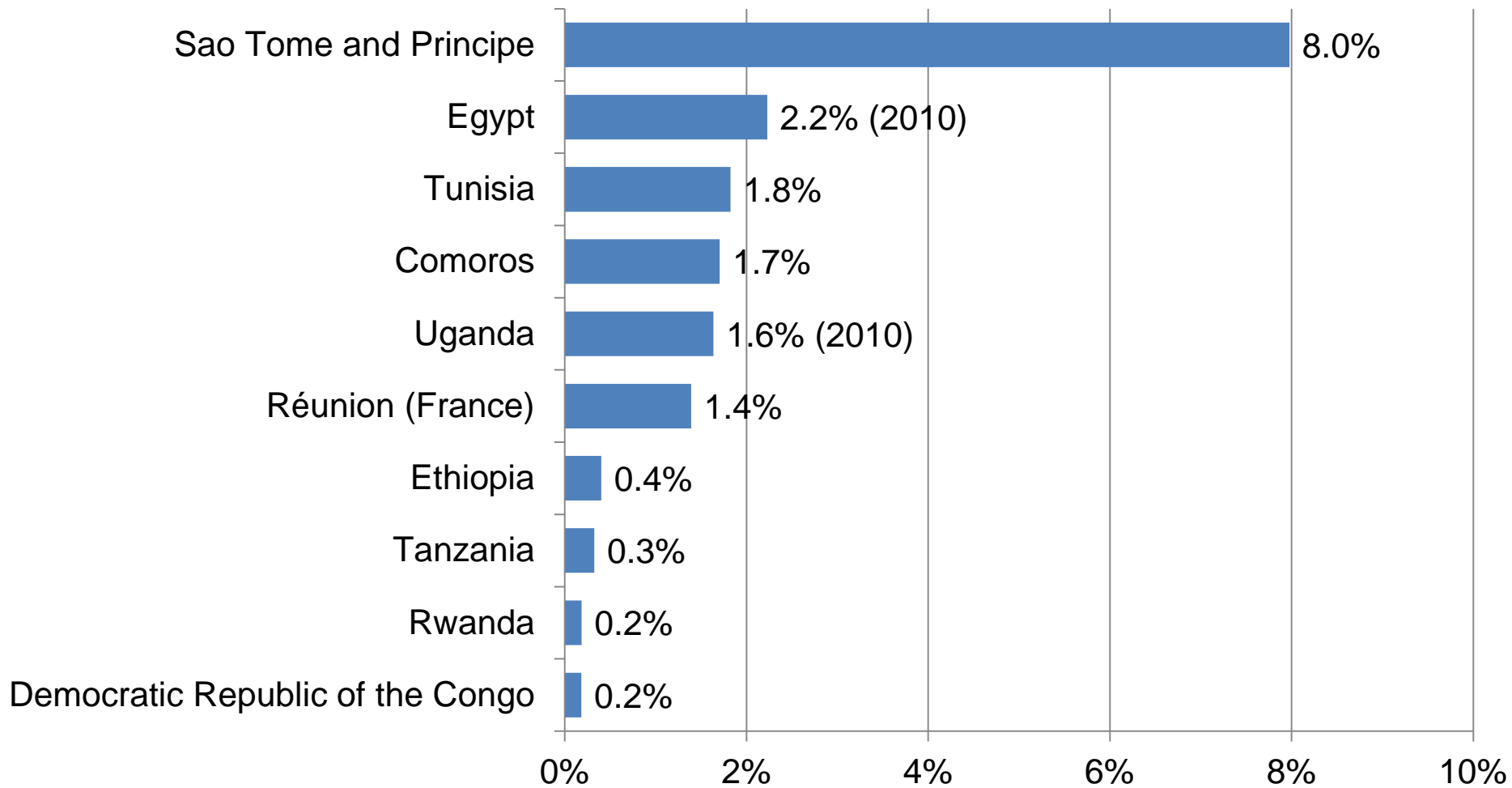
# Africa: The ten countries with the most organic agricultural land 2011



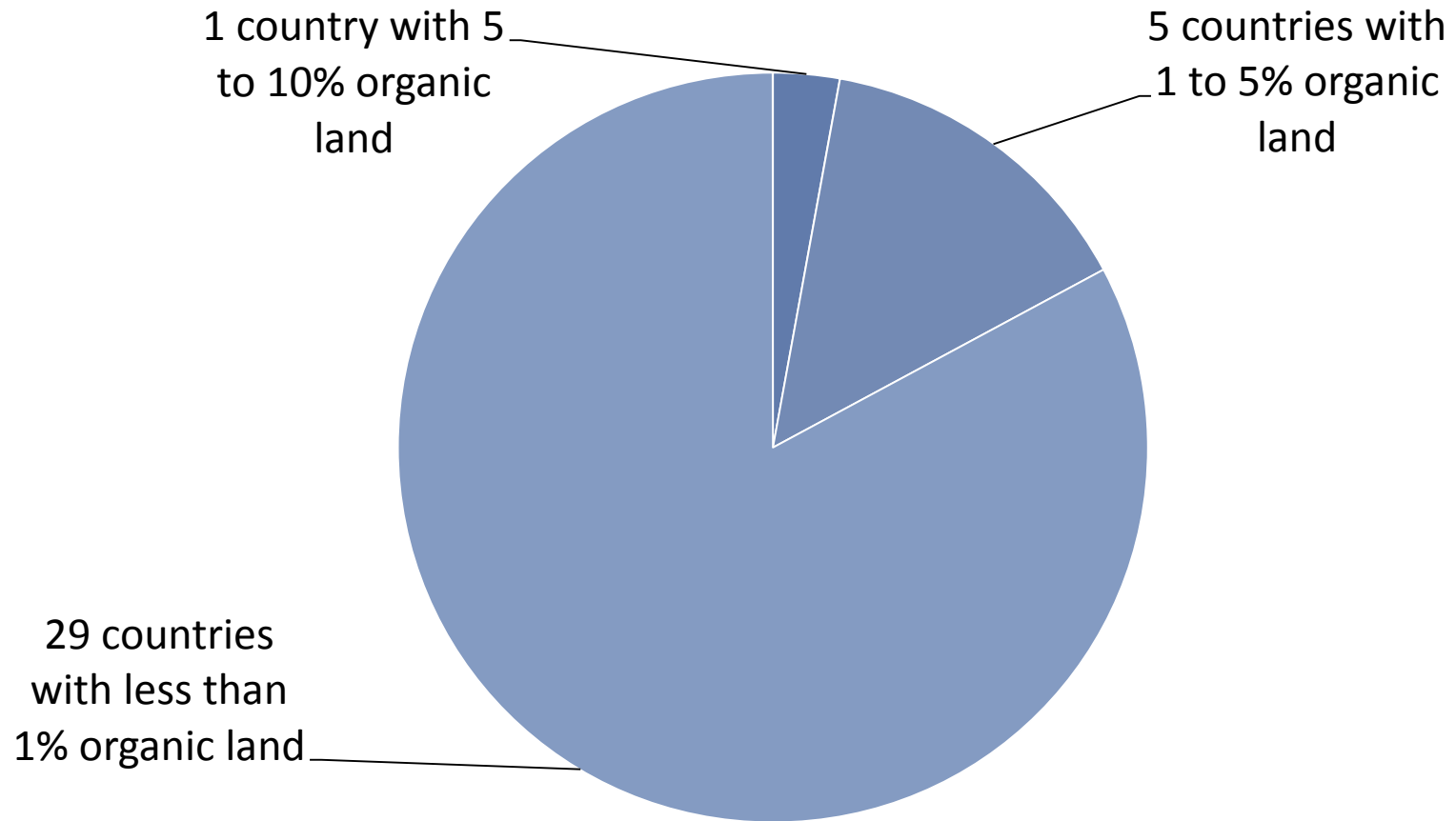
# Africa: Distribution of organically managed agricultural land by country 2011 (total: 1.07 mio ha)



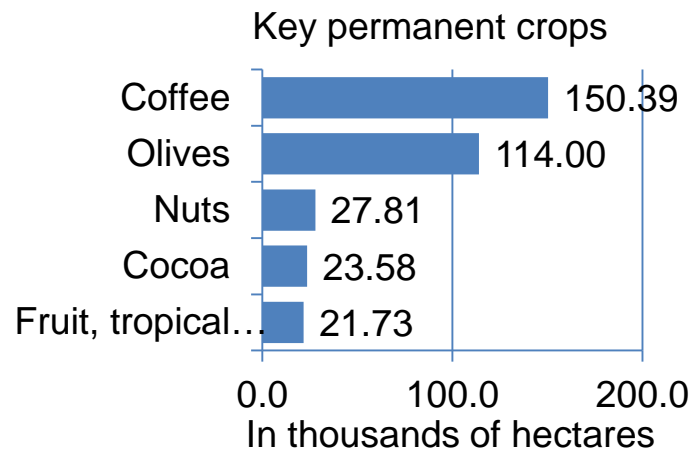
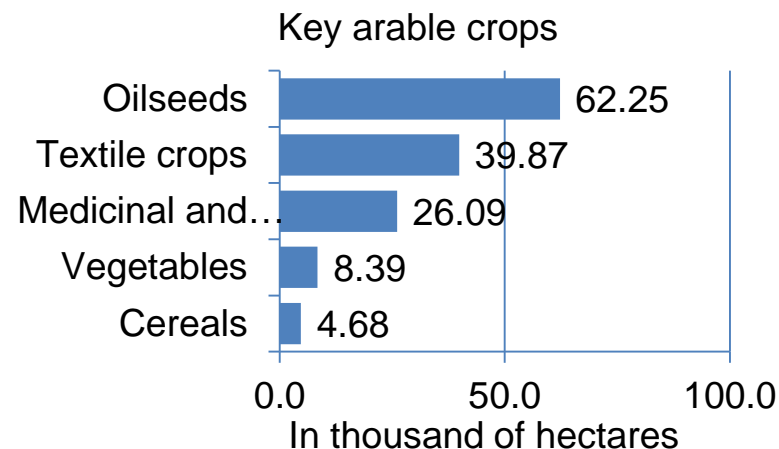
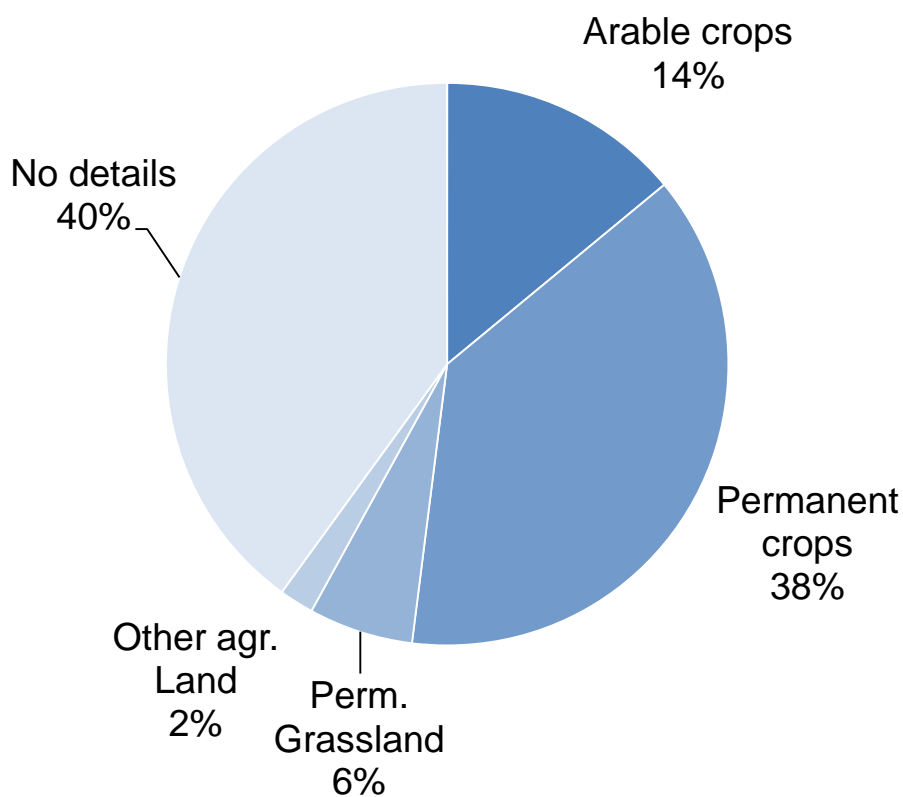
# Africa: The ten countries with the highest shares of organic agricultural land 2011



# Africa: Distribution of shares of organic land 2011



# Africa: Use of organic agricultural land 2011 (total: 1.07 million hectares)



# Articles about Africa in the 2013 edition of "The World of Organic Agriculture"

- › Organic Farming in Africa: Latest Developments  
Hervé Bouagnimbeck



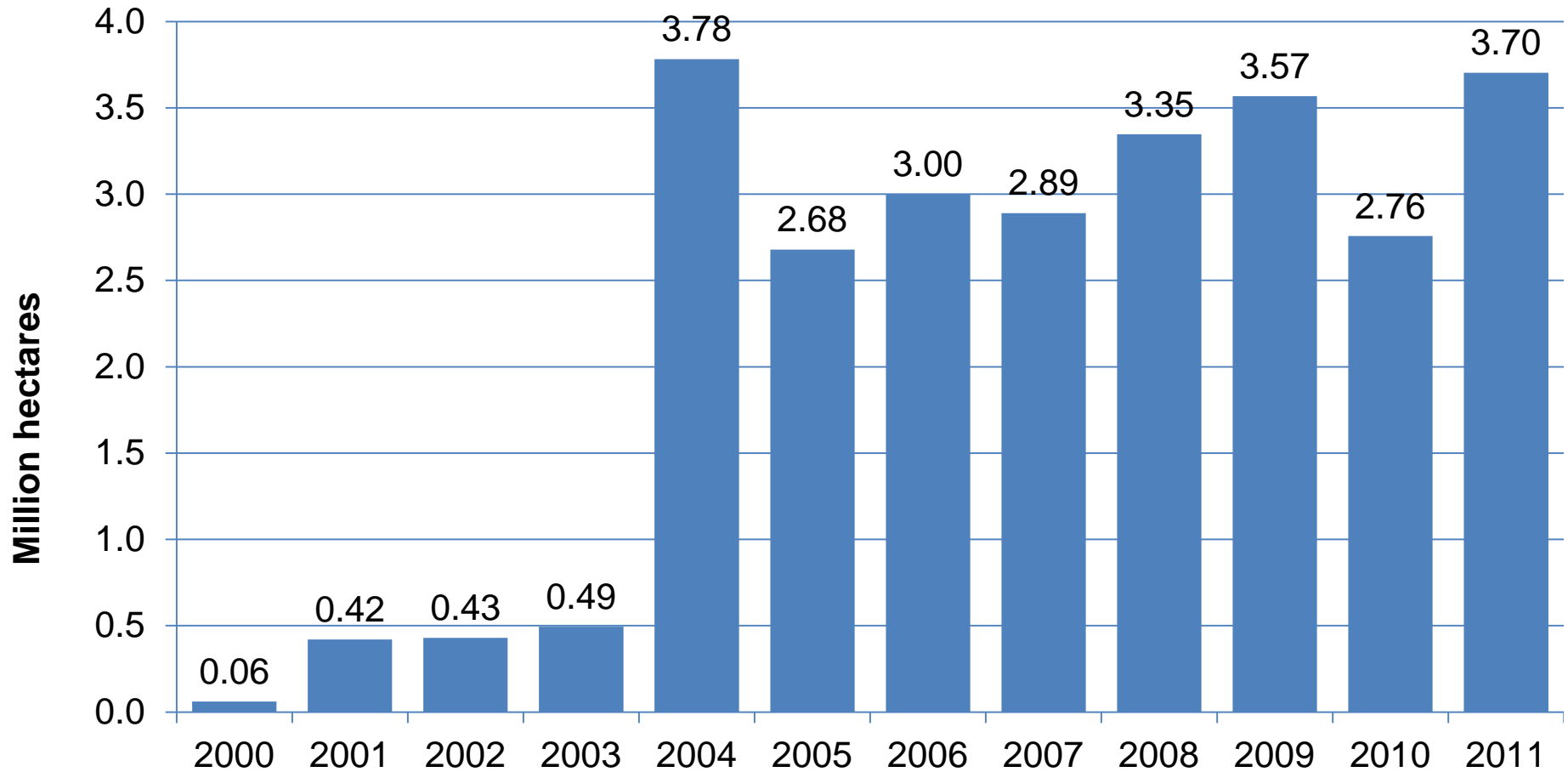
# Asia: Organic agricultural land by country 2011



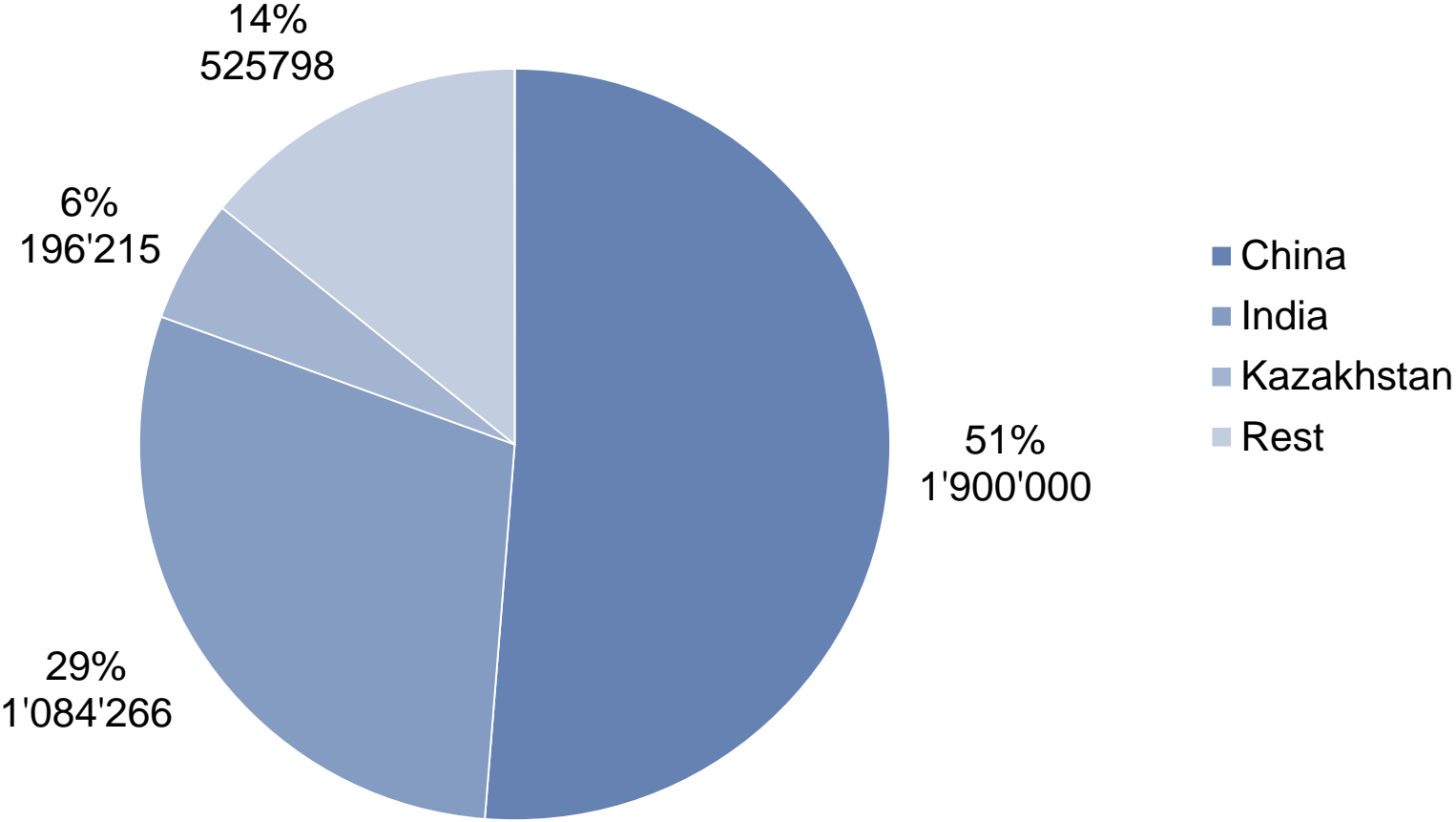
# Organic Agriculture in Asia – Key Figures 2011

- › The total organic agricultural area in Asia was 3.7 million hectares in 2011.
- › This constitutes ten percent of the world's organic agricultural land.
- › There were 0.6 million producers reported.
- › The leading countries by organic agricultural land are China (1.9 million hectares) and India (1 million hectares).
- › Timor-Leste has the most organic agricultural area as a proportion of total agricultural land (almost seven percent).

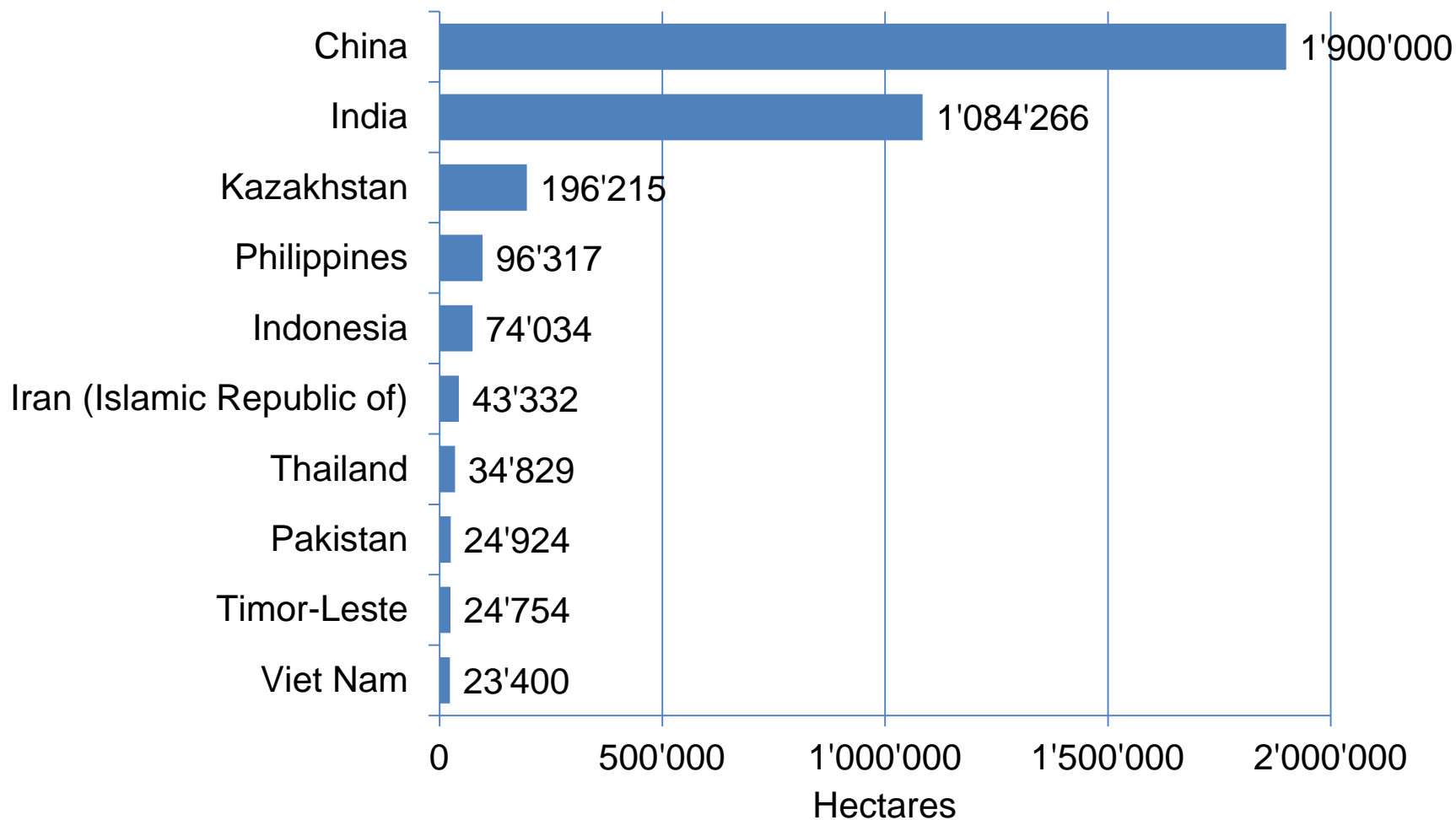
# Asia: Development of organic agricultural land 2000-2011



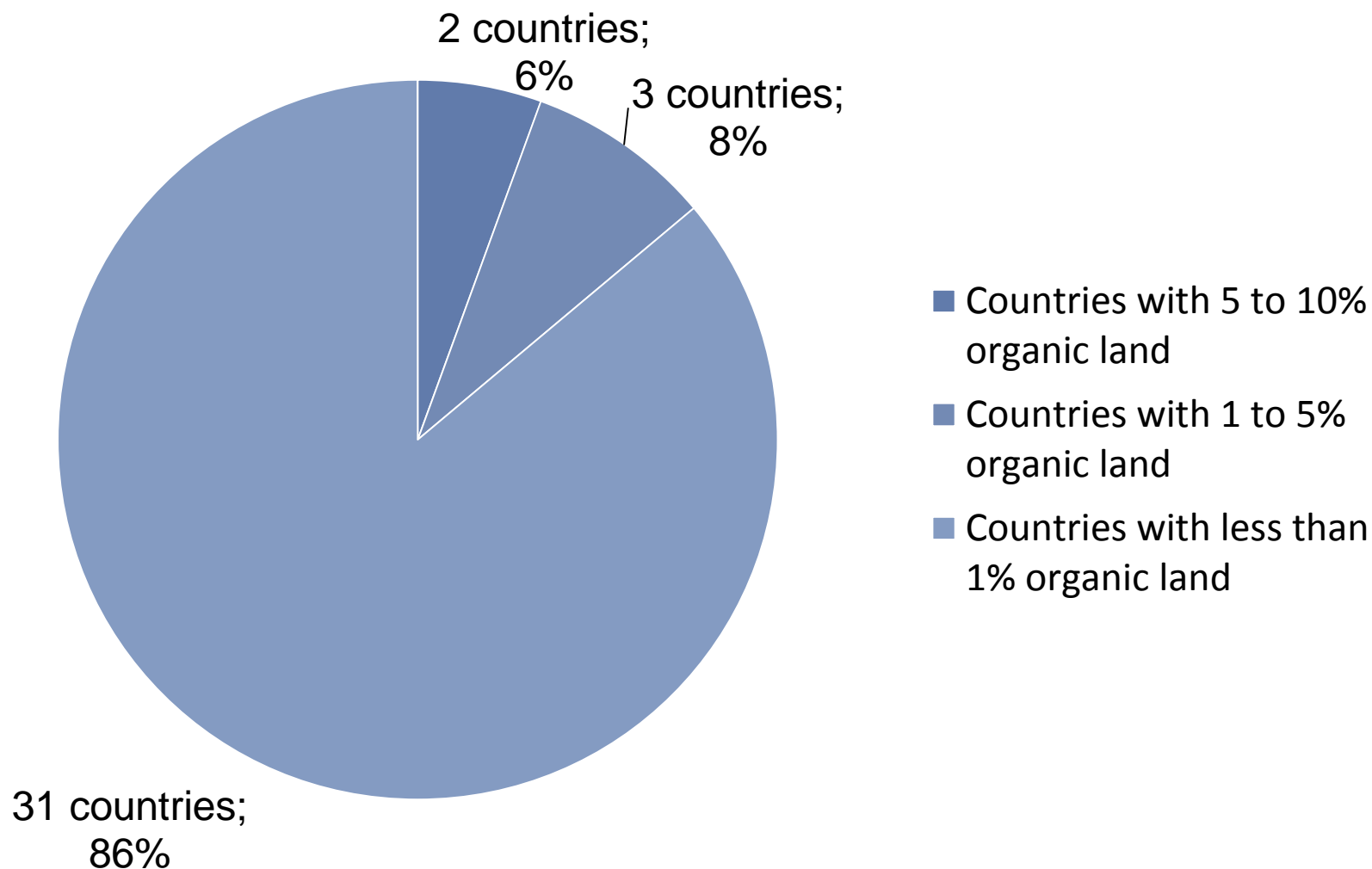
# Asia: Distribution of organic agricultural land by country 2011 (total 3.7 million hectares)



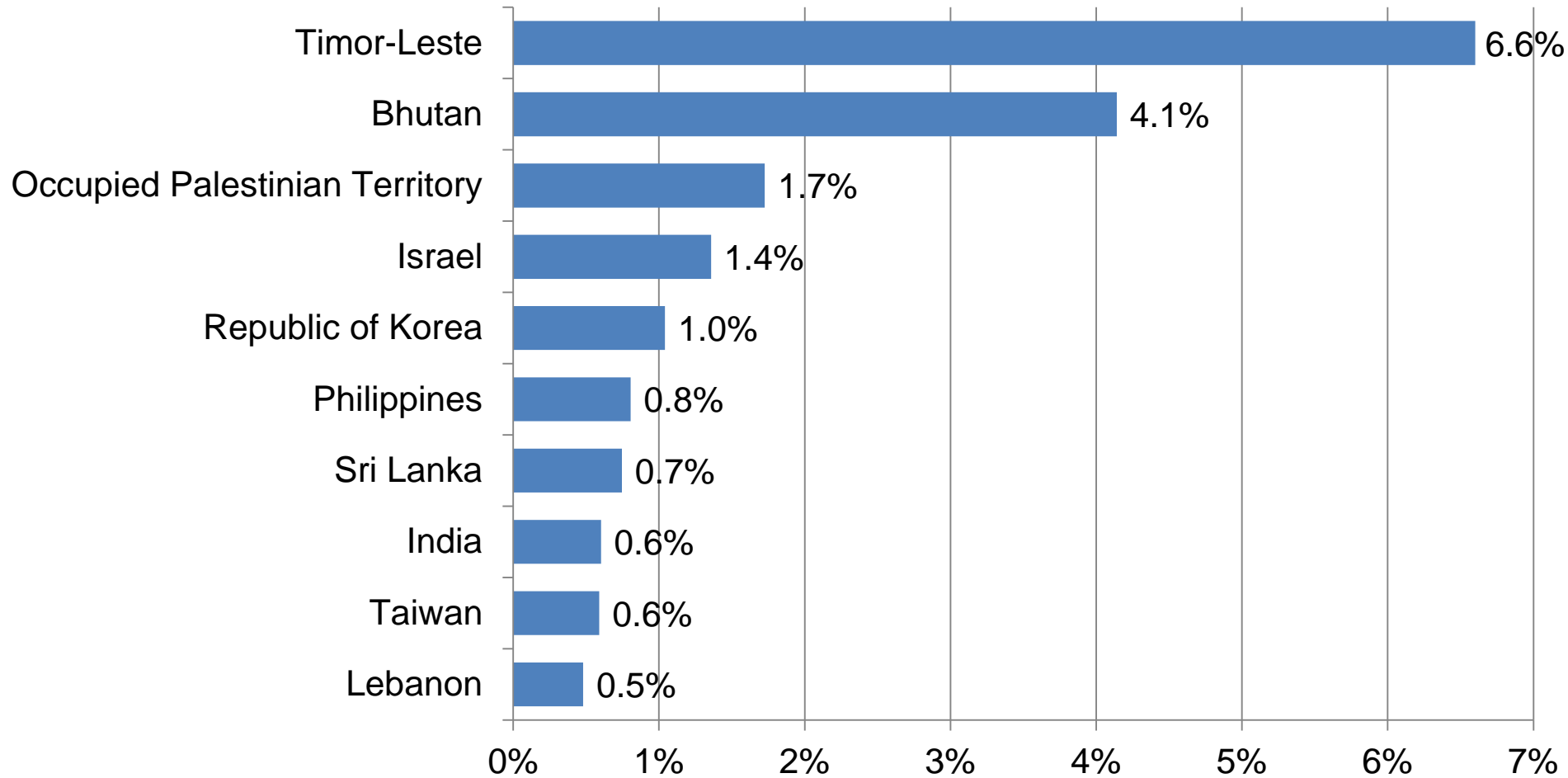
# Asia: The ten countries with the most organic agricultural land 2011



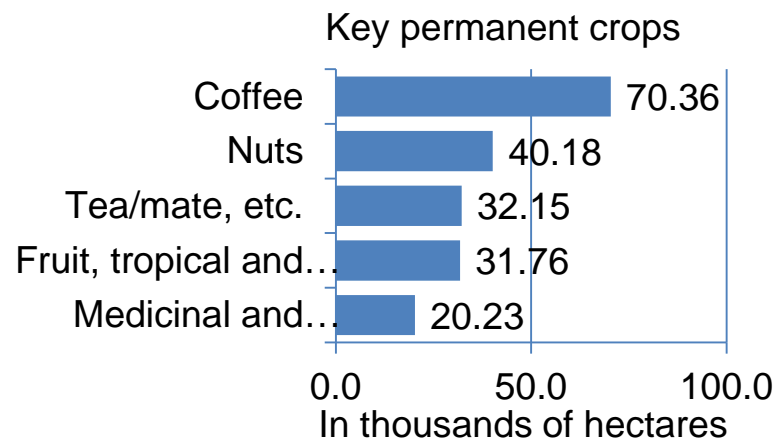
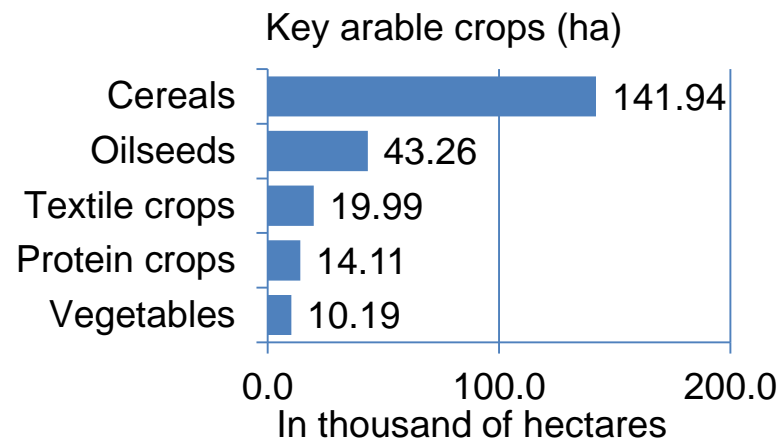
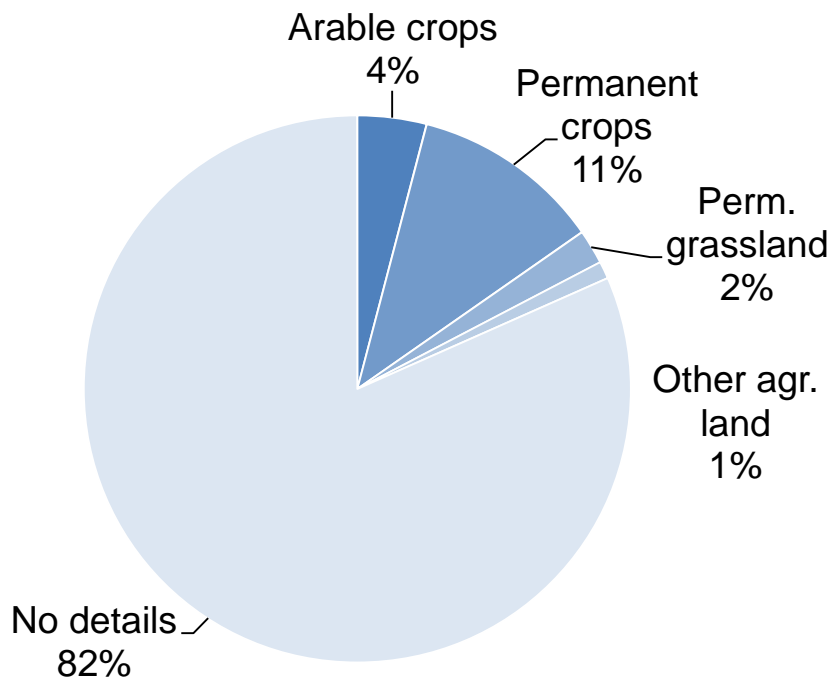
# Asia: Distribution of shares of organic land 2011



# Asia: The ten countries/territories with the highest shares of organic agricultural land 2011



# Asia: Use of organic agricultural land 2011 (total: 3.7 million hectares)

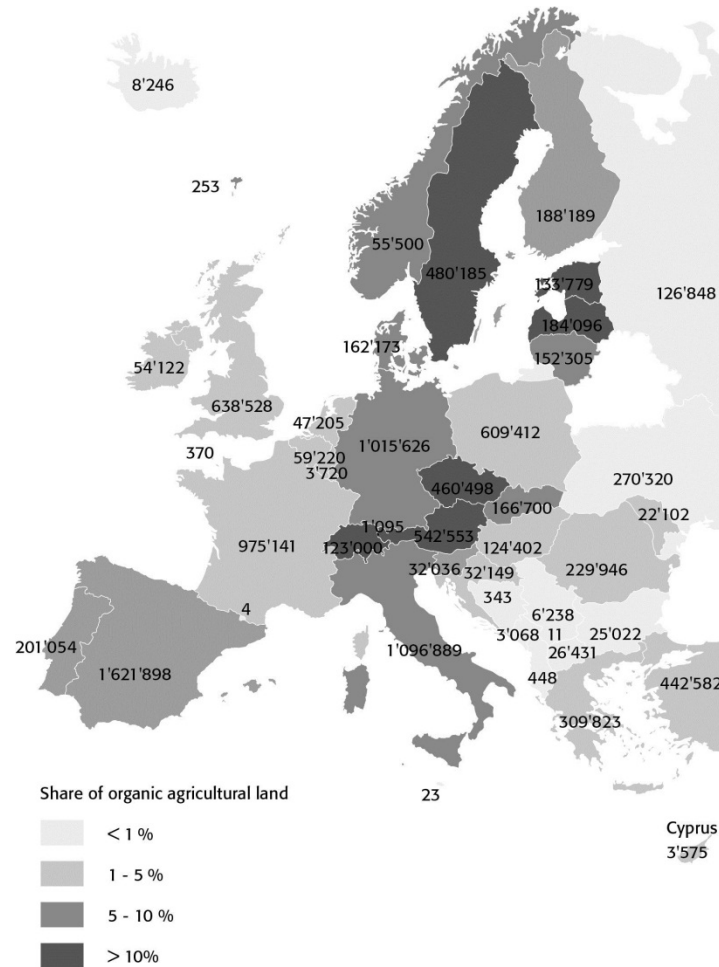




# Articles about Asia in the 2013 Edition of "The World of Organic Agriculture"

- › Developments in Asia  
Ong Kung Wai
- › Organic Agriculture in Saudi Arabia  
Marco Hartmann, Saad Khalil, Thomas Bernet, Felix Ruhland, Ayman Al Ghamdi

# Europe: Organic agricultural land by country 2011



# Organic agriculture in Europe: Key data/indicators 2011

- › 10.6 million hectares of agricultural land are organic (including in conversion areas).
- › This constitutes 2.2 percent of the agricultural land in Europe.
- › The organic agricultural land increased by 0.6 million hectares or six percent in 2011 .
- › Amost 290'000 producers were reported.

# Organic agriculture in the European Union: Key data/indicators 2011

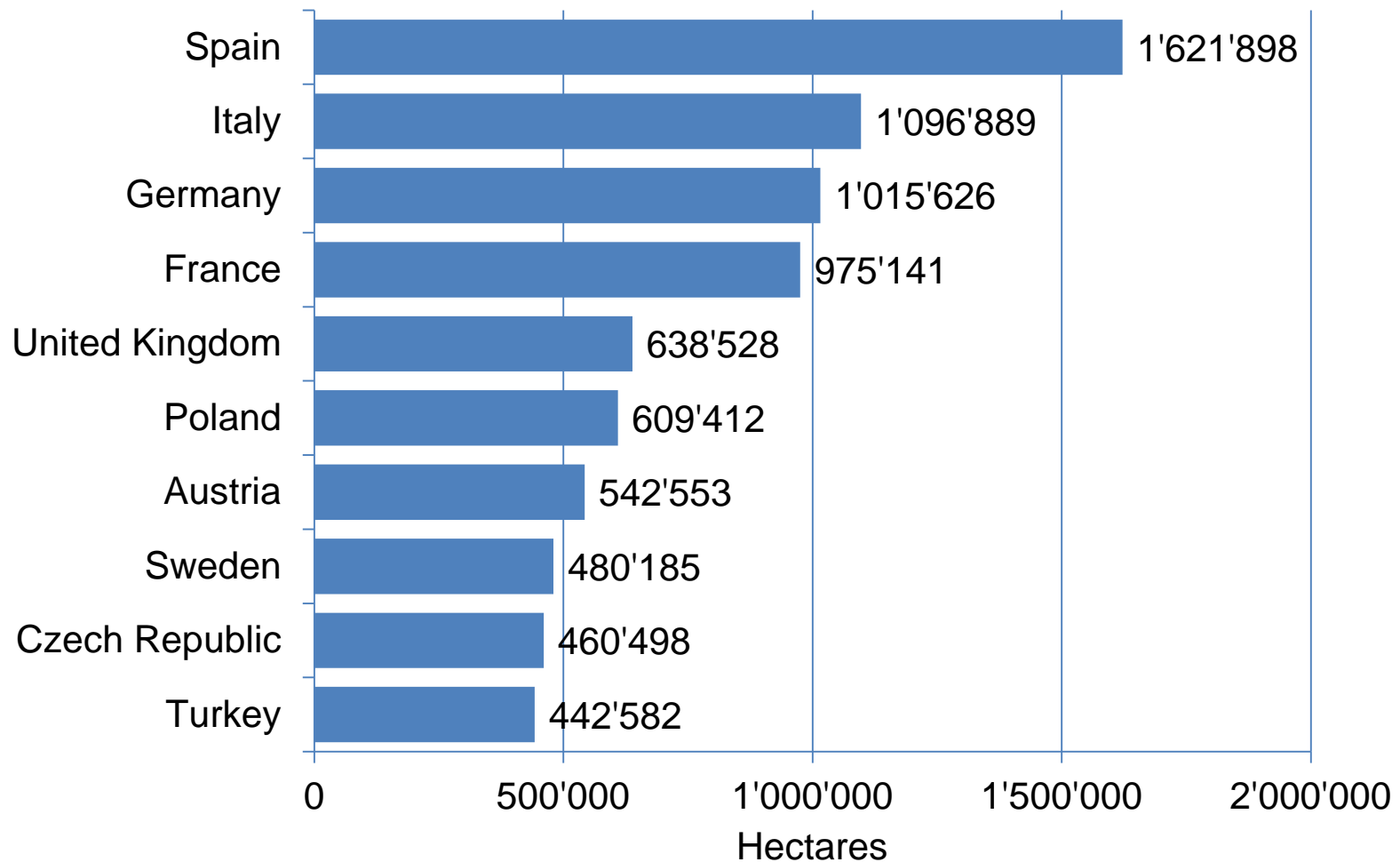
- › 9.5 million hectares of agricultural land are organic (including in conversion areas).
- › This constitutes 5.4 percent of the agricultural land in the European Union.
- › The organic agricultural land increased by 0.5 million hectares or six percent in 2011.
- › Almost 240'000 producers were reported.

# Organic market in Europe: Key data/indicators 2011

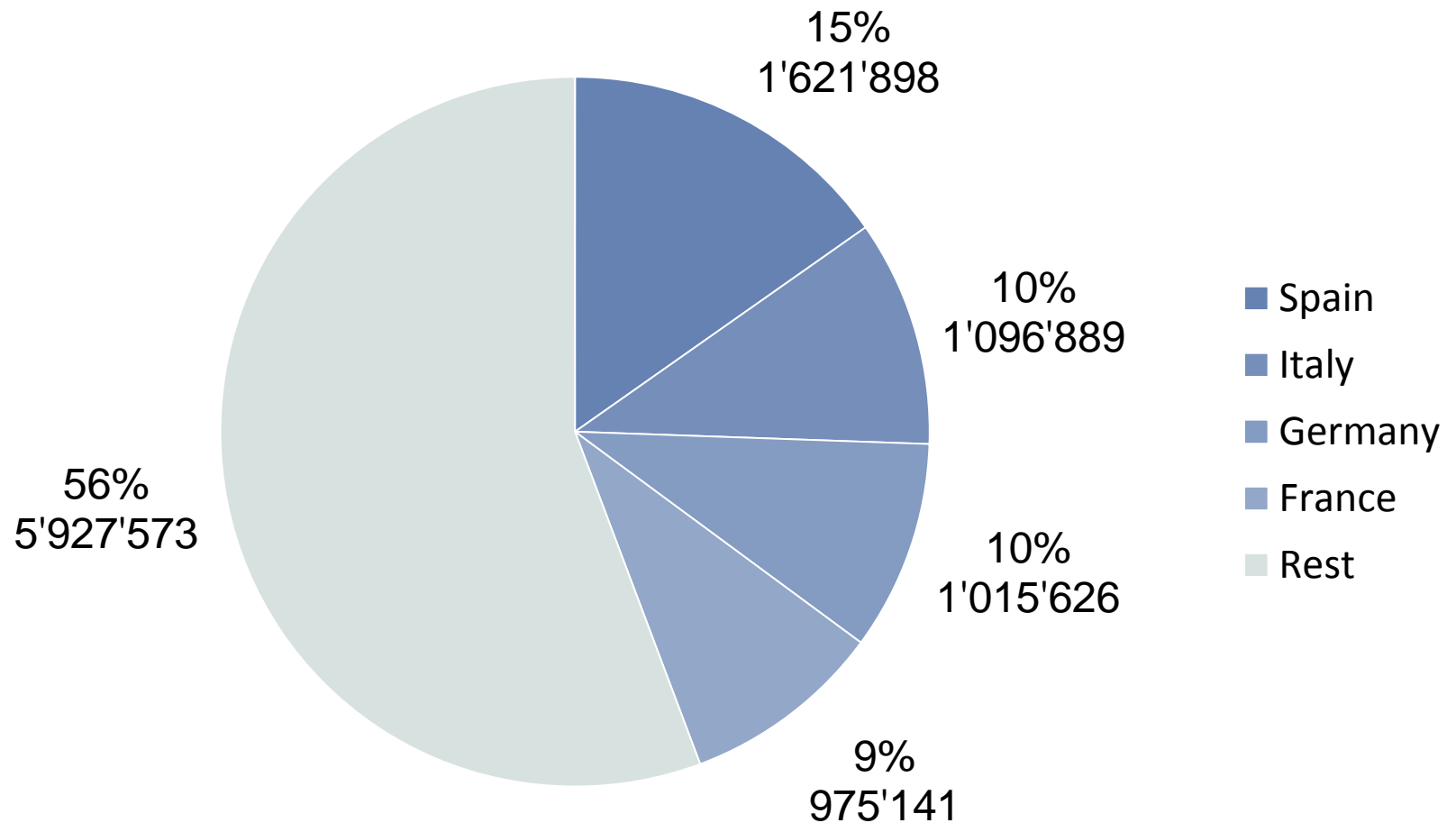
- › The market was 21.5 billion euros; nine percent more than in 2010.
- › The largest market for organic products in 2011 was Germany with a turnover of 6.6 billion euros, followed by France (3'756 million euros) and the UK (1'882 million euros).
- › As a portion of the total market share, the highest levels have been reached in Denmark, Austria and Switzerland, with five percent or more for organic products. The highest per capita spending is also in these countries and in Luxembourg.



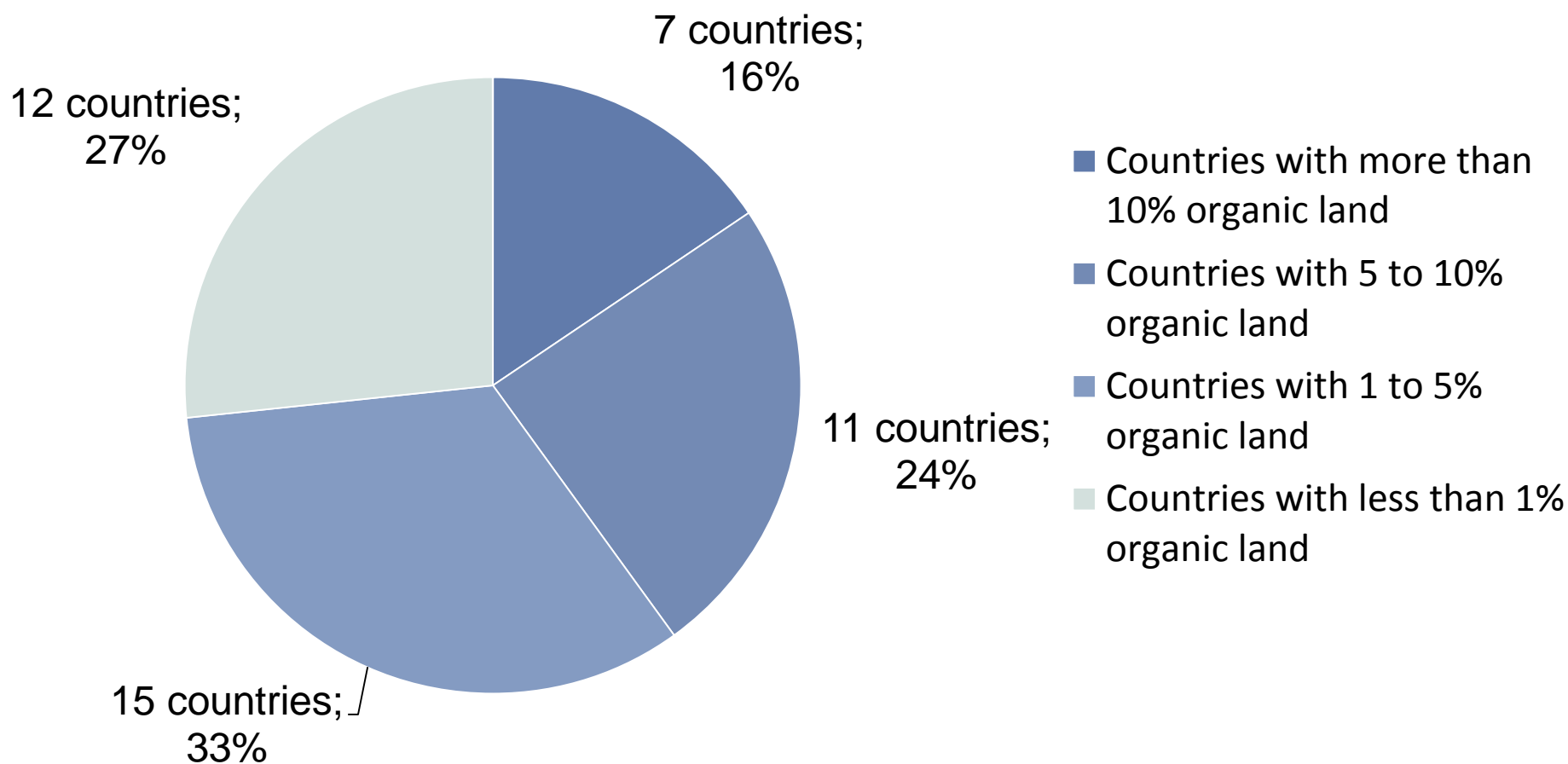
# Europe: The ten countries with the most organic agricultural land 2011



# Europe: Distribution of organically managed agricultural land by country 2011 (Total: 10.6 million hectares)

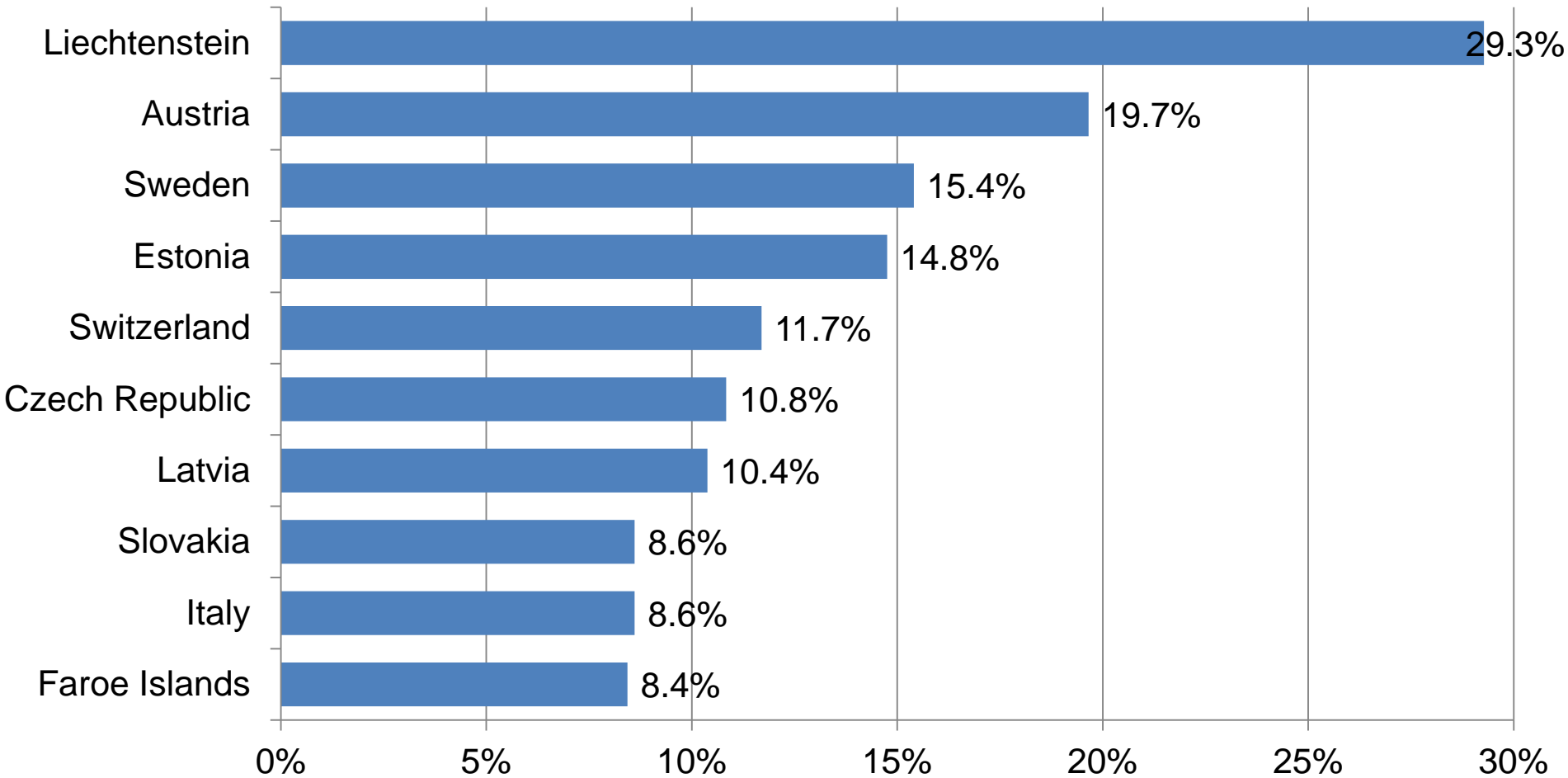


# Europe: Distribution of shares of organic land 2011

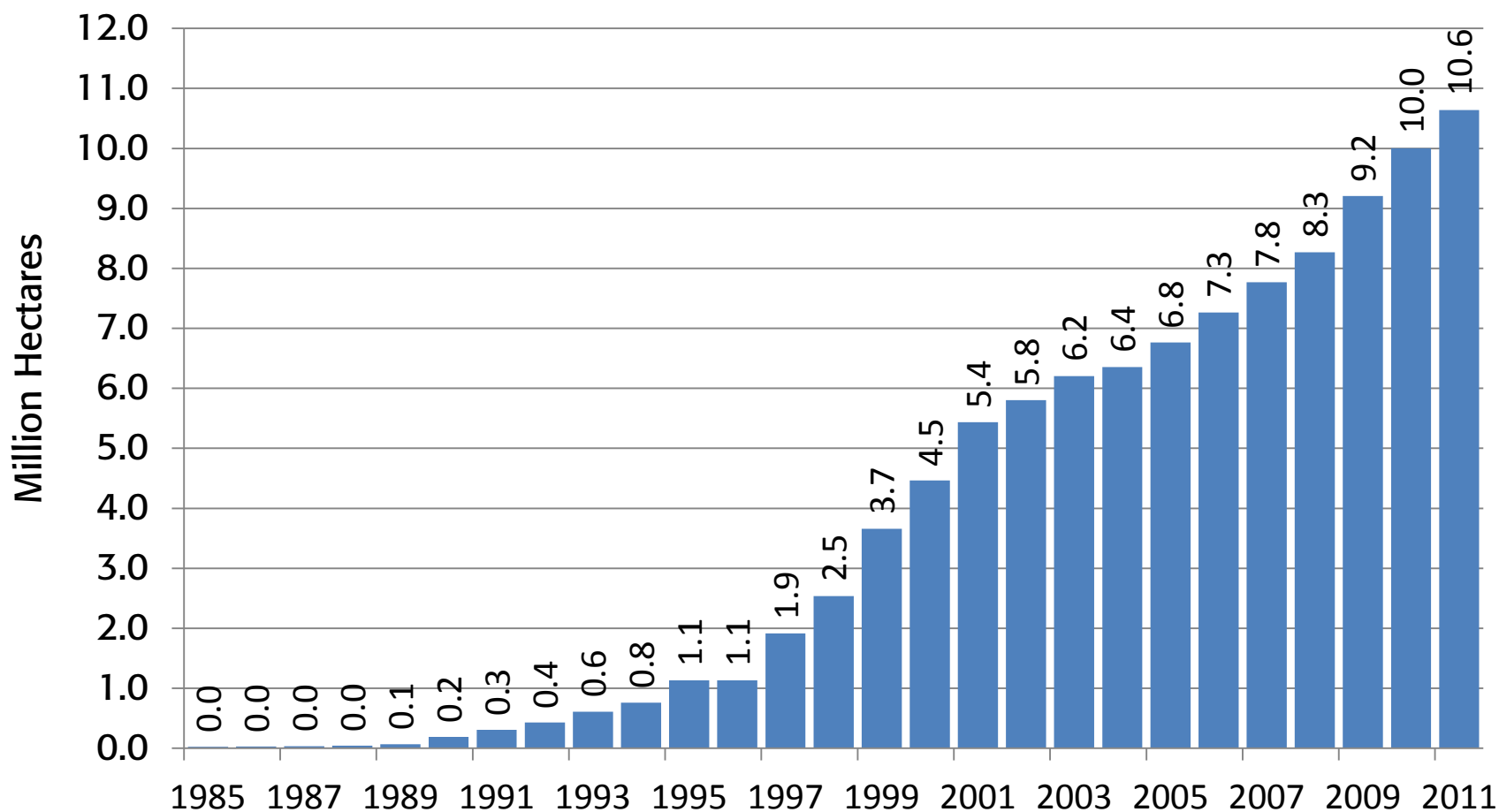




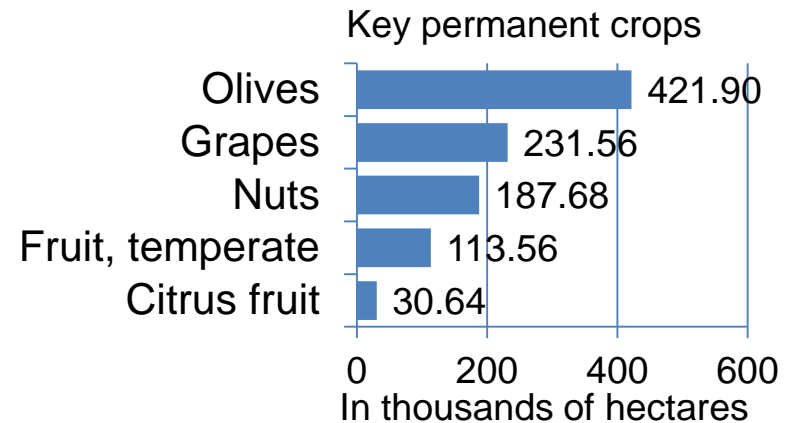
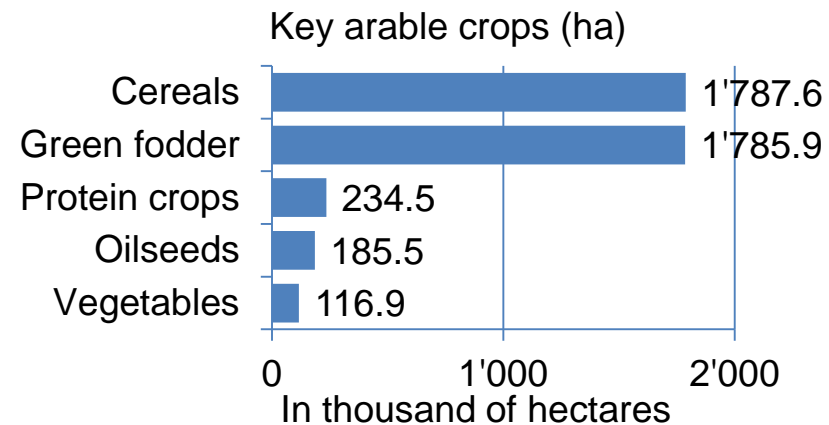
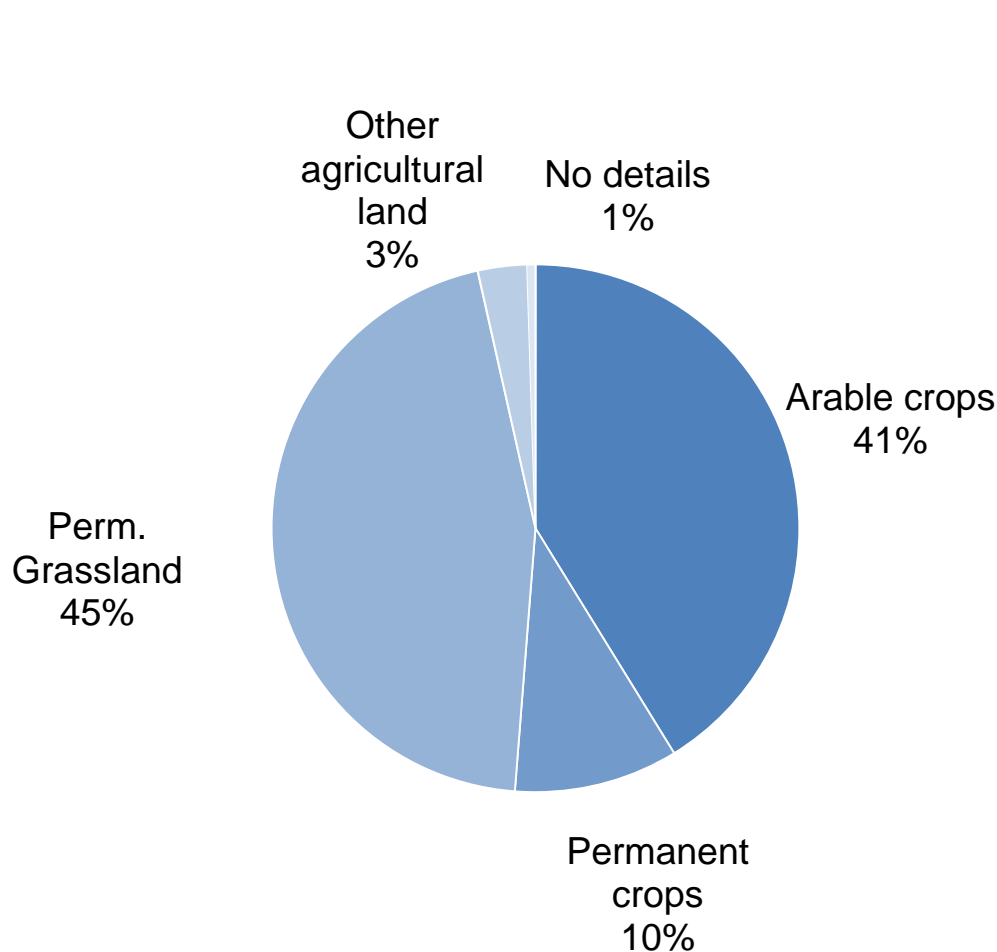
# Europe: The ten countries with the highest shares of organic agricultural land 2011



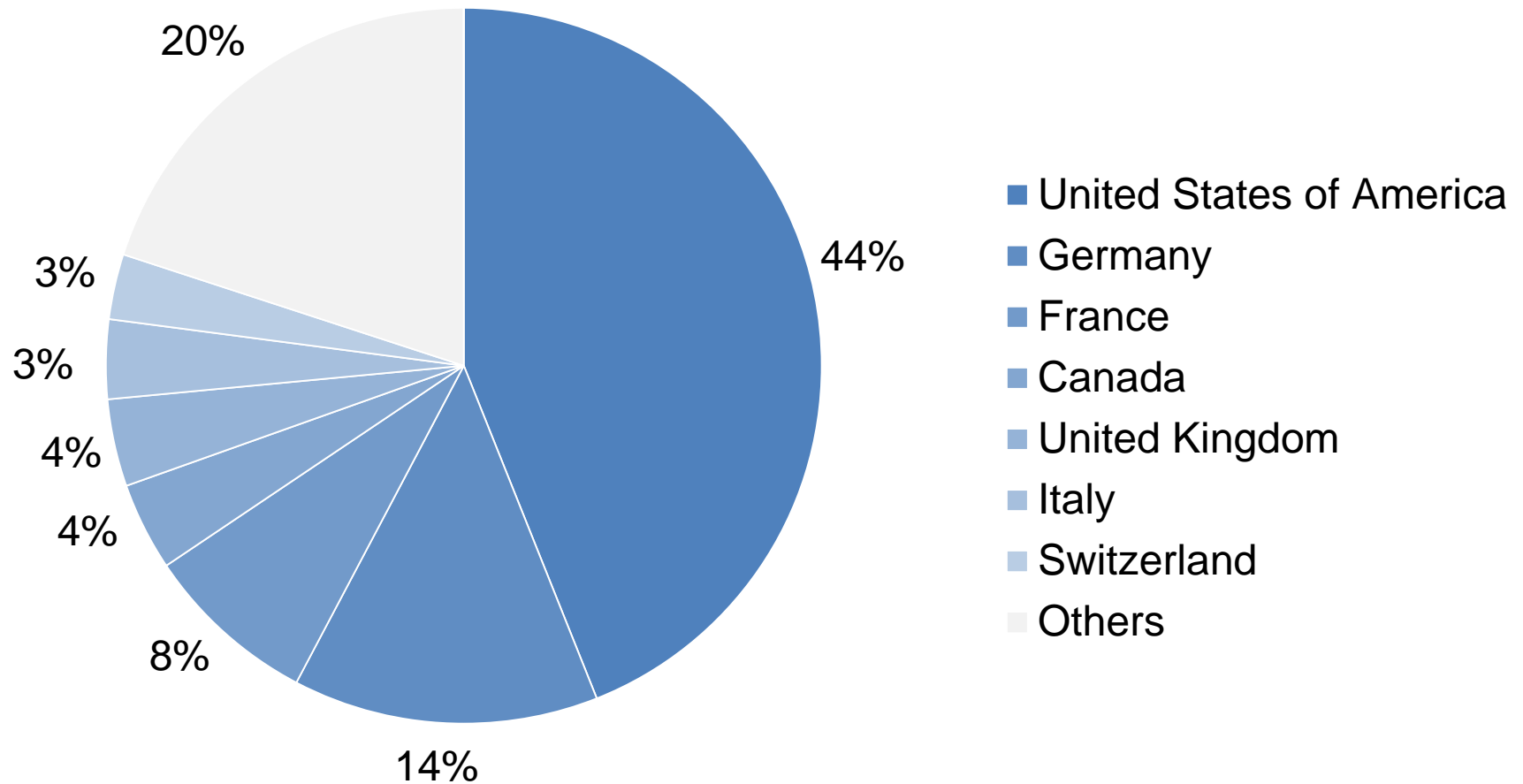
# Development of the organic agricultural land in Europe 1985-2011



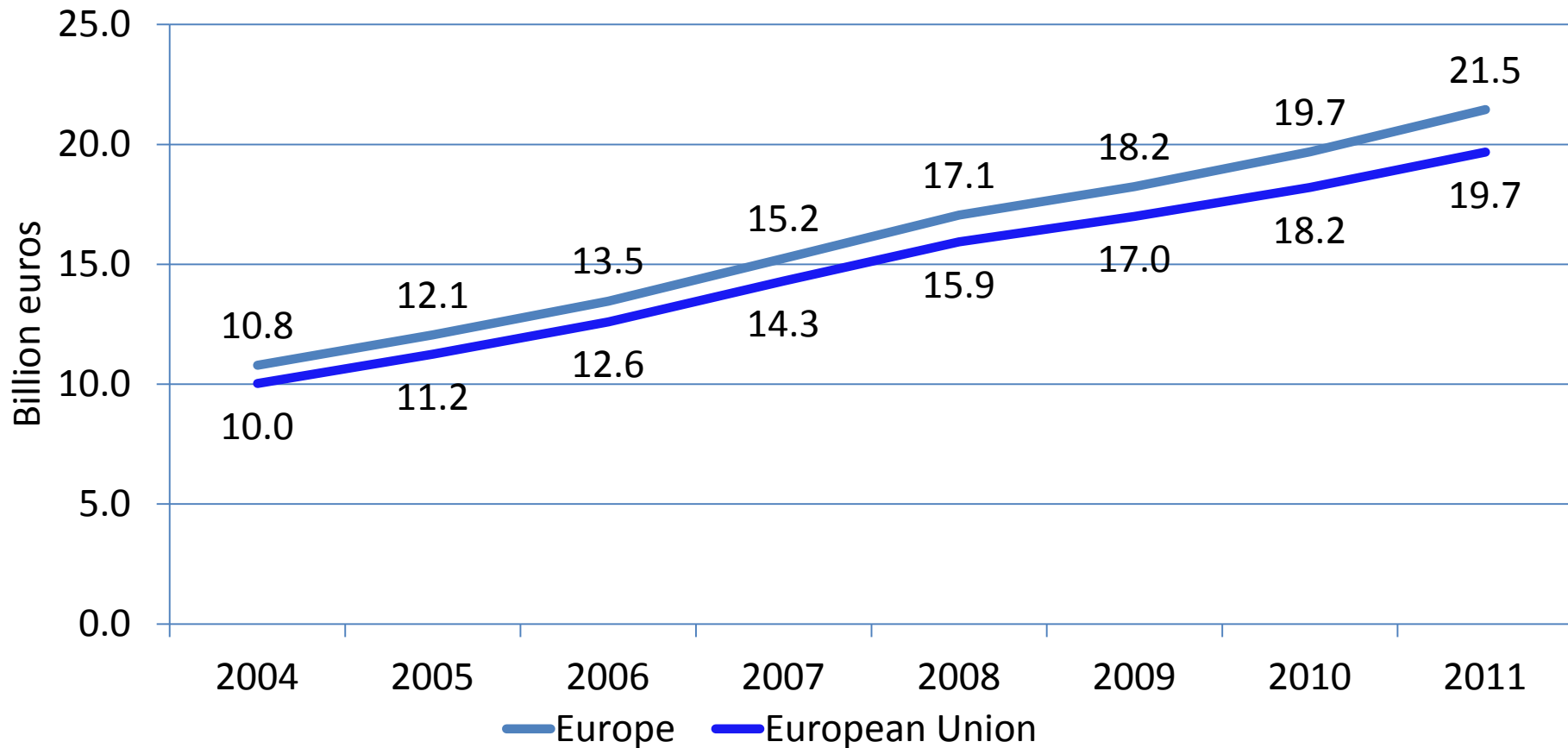
# Europe: Use of organic agricultural land 2011 (total: 10.6 million hectares)



# Distribution of organic sales by country worldwide 2011

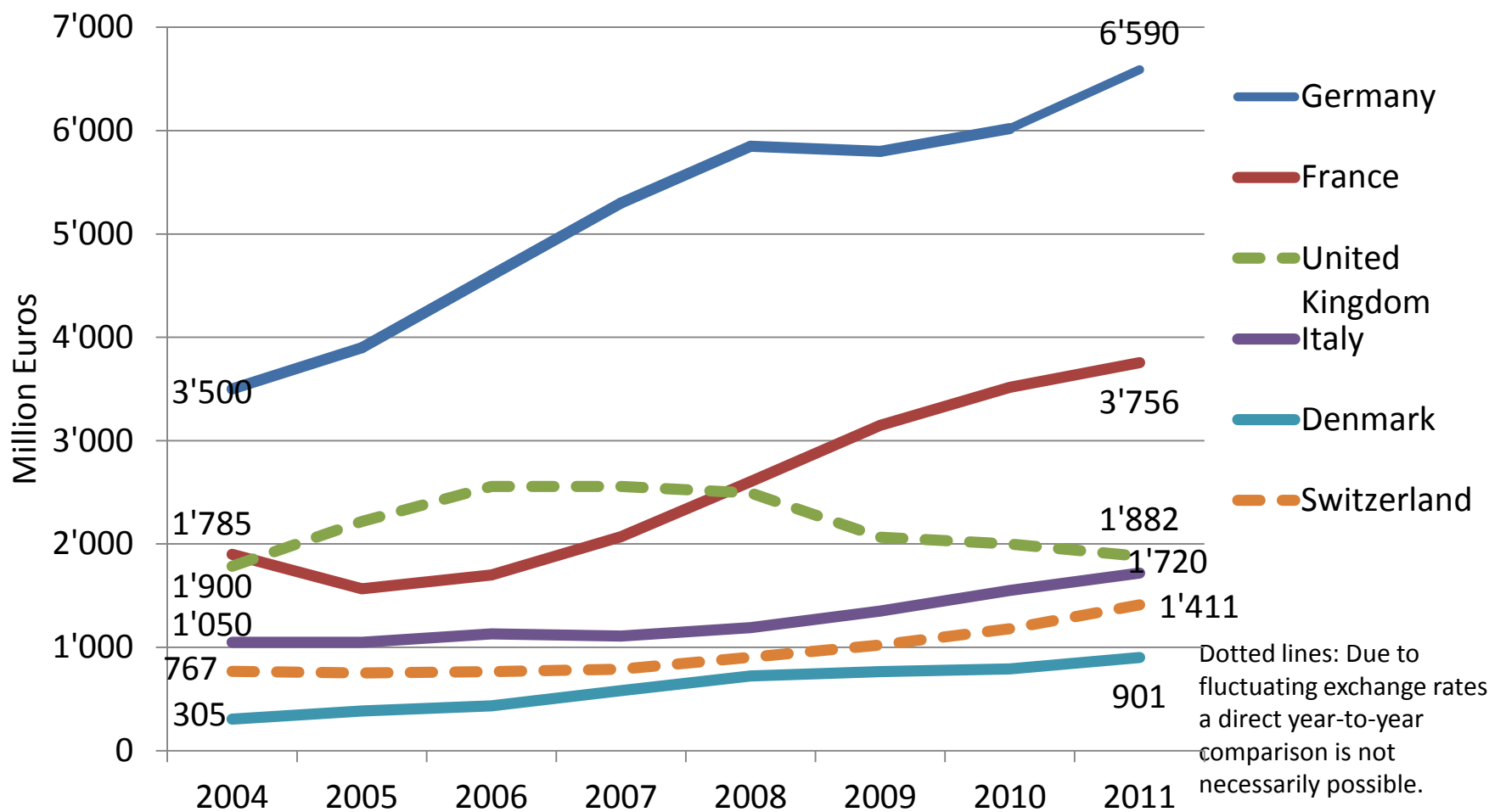


# Europe and European Union: Growth of the Organic Market 2004-2011



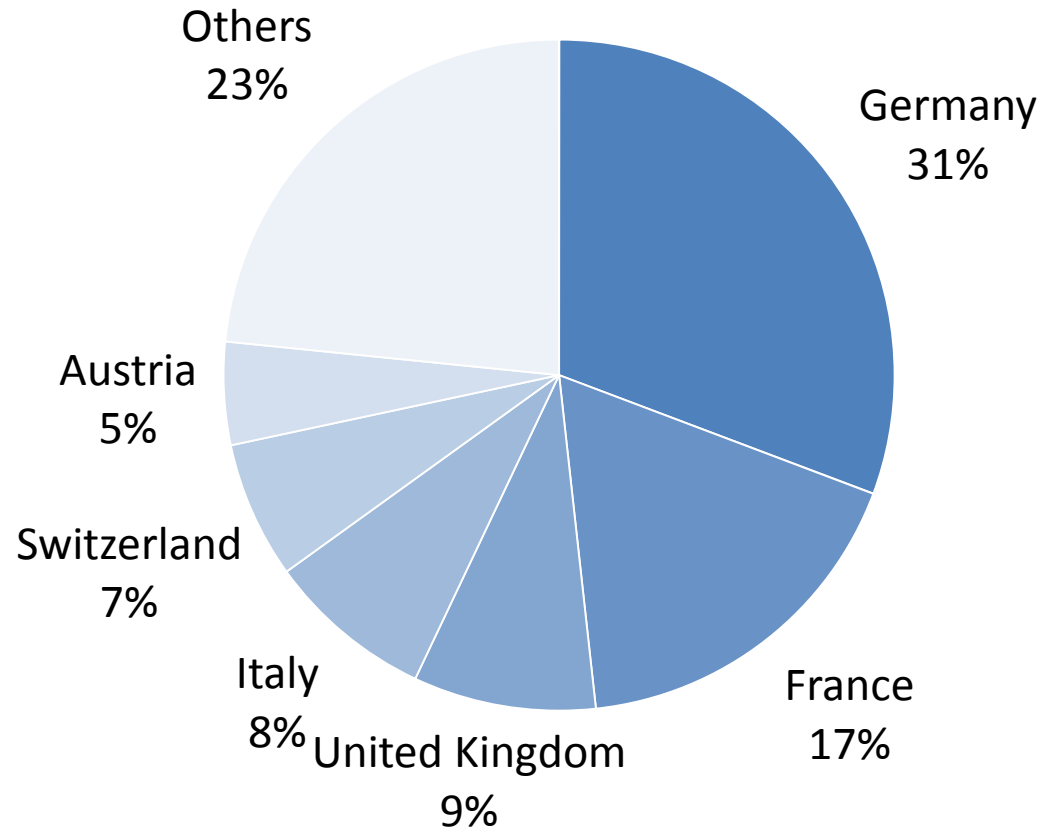
# Development of the organic market in selected European countries 2004-2011

Last Update: February 10, 2013

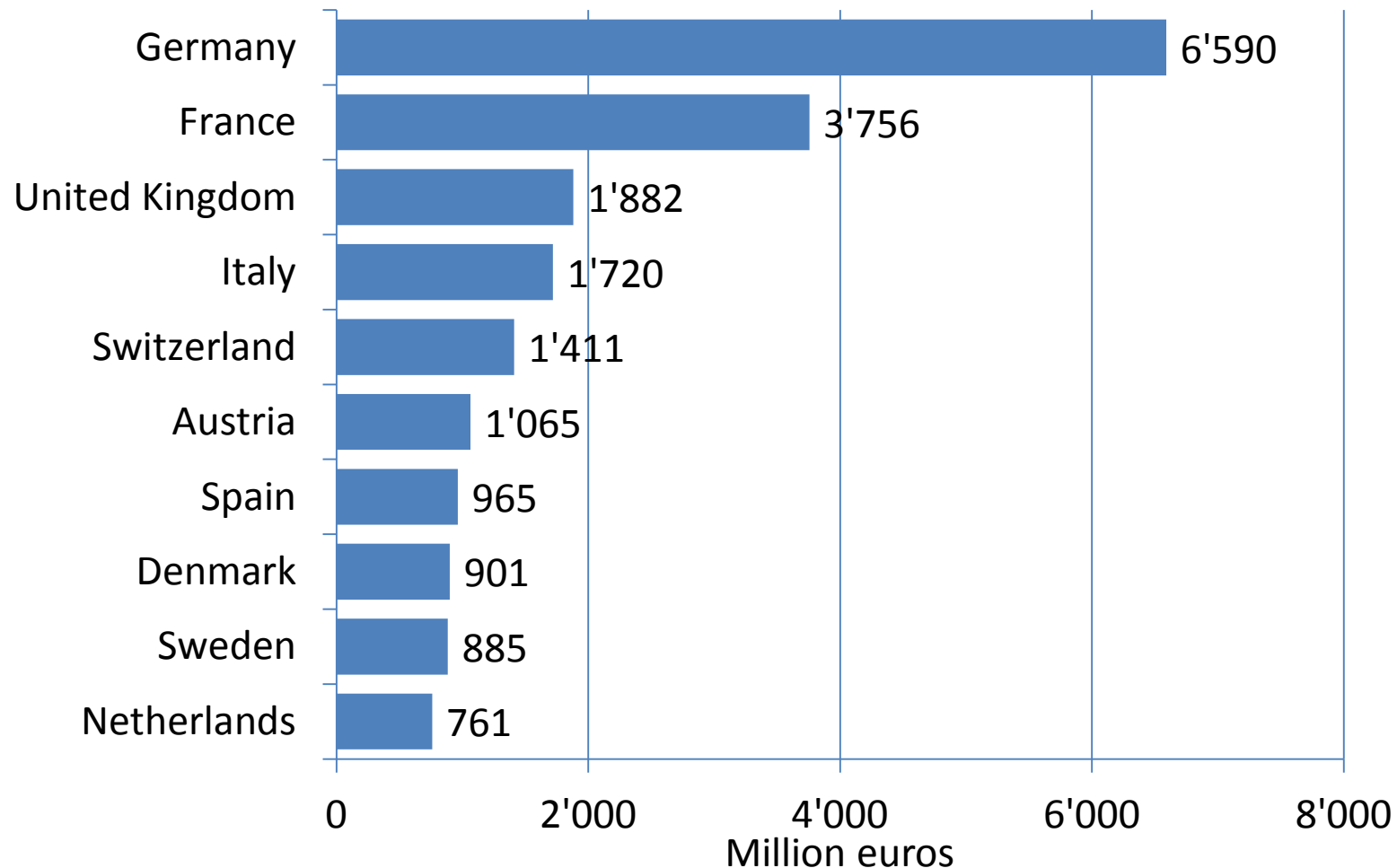


# Europe: Distribution of sales of organic food and drink by country 2011 (total: 21.5 billion euros)

Last update: February 10, 2013



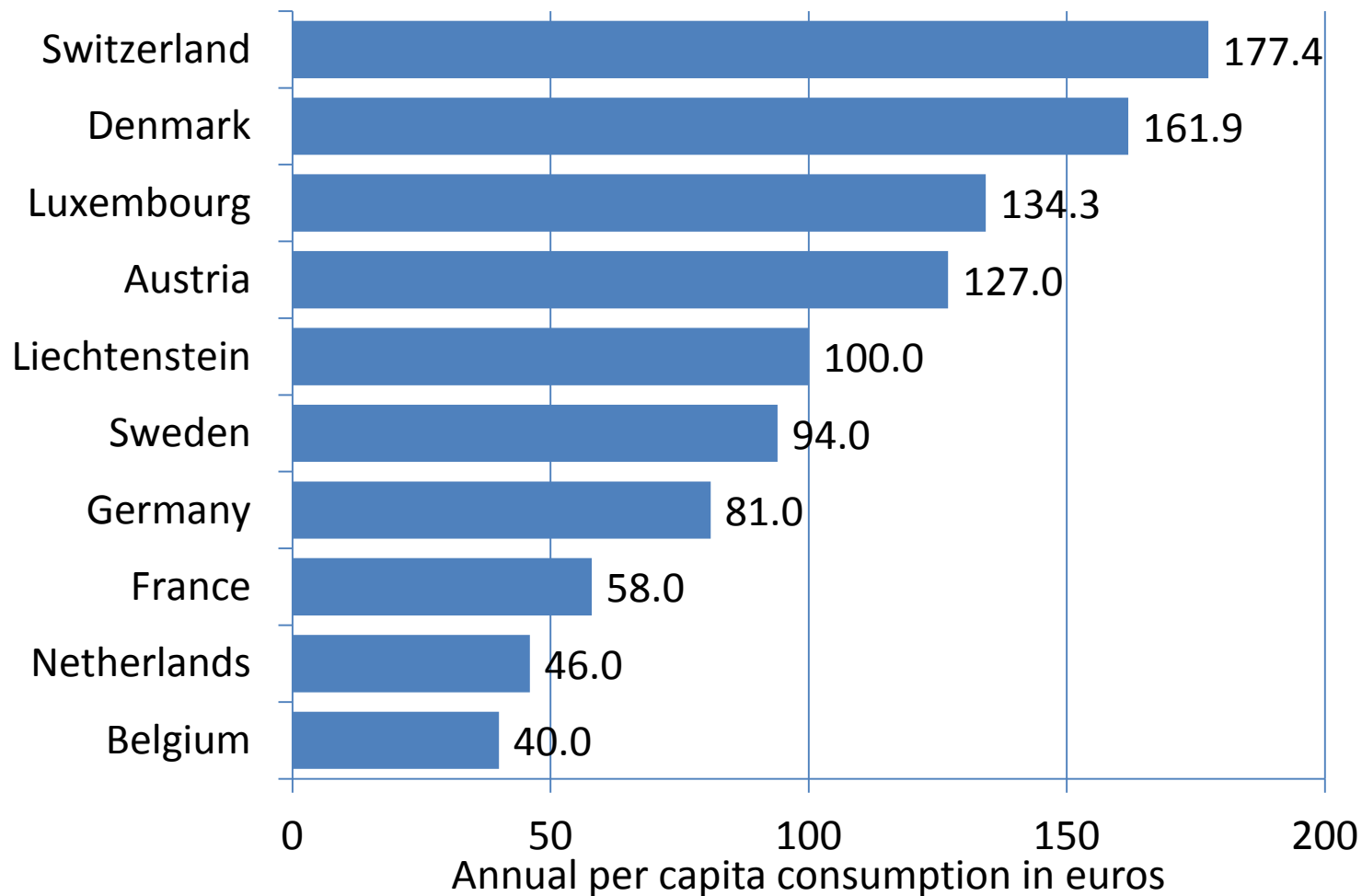
# The European market for organic food and drink: The countries with the highest sales 2011





# The European market for organic food: The countries with the highest per capita consumption 2011

Last update: February 10, 2013



# Articles about Europe in the 2013 Edition of "The World of Organic Agriculture"

- › Organic Agriculture in Europe: Overview  
Helga Willer
- › The Organic Market in Europe 2011  
Diana Schaack, Julia Lernoud, Helga Willer, and Susanne Padel
- › Improving European Organic Market Information -The OrganicDataNetwork Project  
Raffaele Zanolì
- › Survey of the Demands of End Users in Europe for Organic Market Data  
Robert Home, Matthias Stolze, and Michal Losták
- › Organic Agriculture in Albania  
Thomas Bernet and Iris S. Kazazi
- › Organic Agriculture in Hungary  
Zoltan Dezsény and Dóra Drexler
- › Organic Agriculture in Kosovo  
Sylë Sylanaj
- › Montenegro - Country Report  
Natasa Mirecki
- › Organic Farming in Serbia  
Guido Haas

# Latin America/Caribbean: Organic agricultural land by country 2011



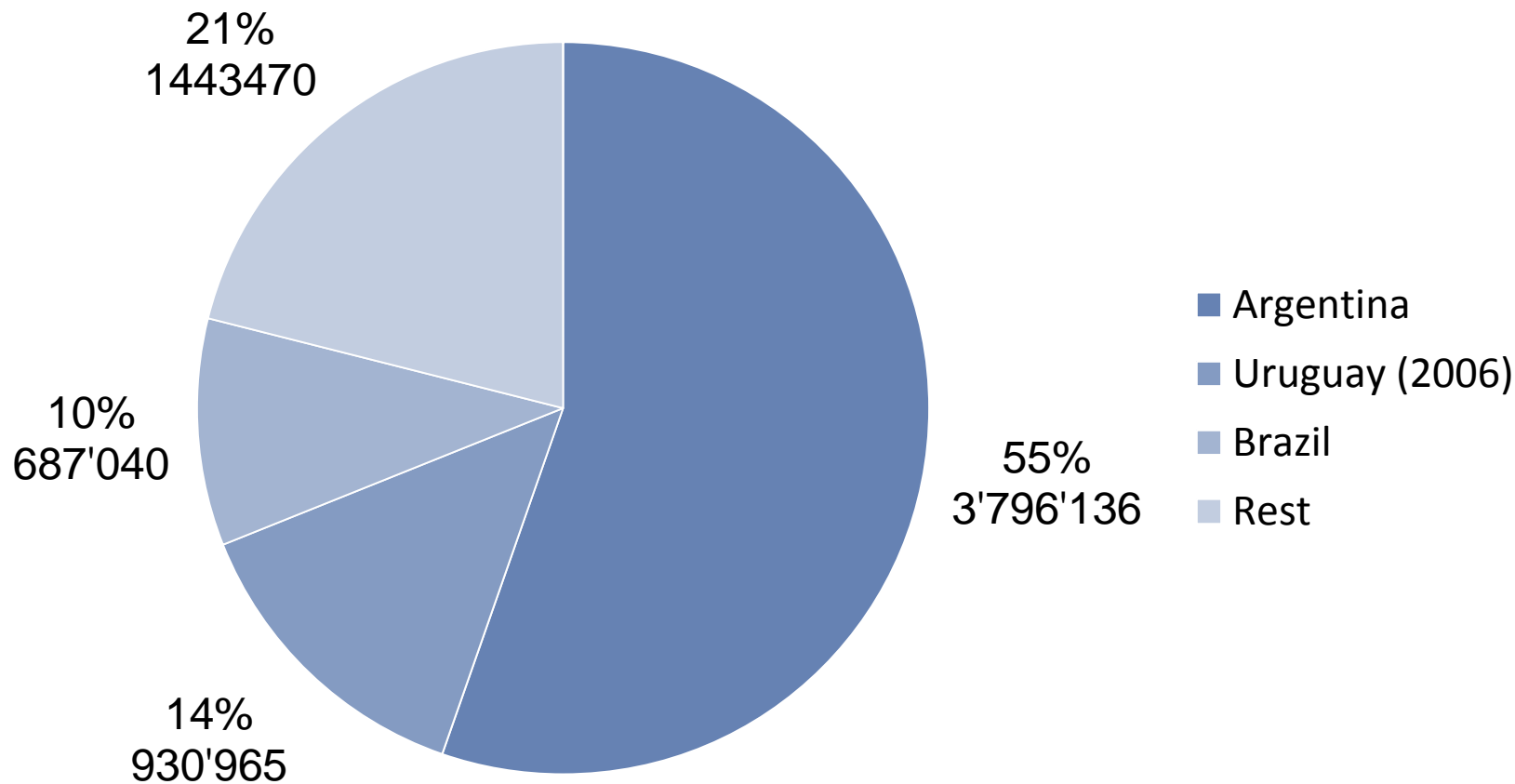
# Latin America: Key figures 2011

- › In Latin America, more than 300'000 producers managed 6.9 million hectares of agricultural land organically in 2011.
- › This constitutes 18 percent of the world's organic land and 1.1 percent of the regions agricultural land.
- › The leading countries are Argentina (3.8 million hectares), Uruguay (0.93 million hectares), and Brazil (0.69 million hectares).
- › The highest shares of organic agricultural land are in the Falkland Islands/Malvinas (35.9 percent), French Guiana (17.5 percent), and the Dominican Republic (9.6 percent).

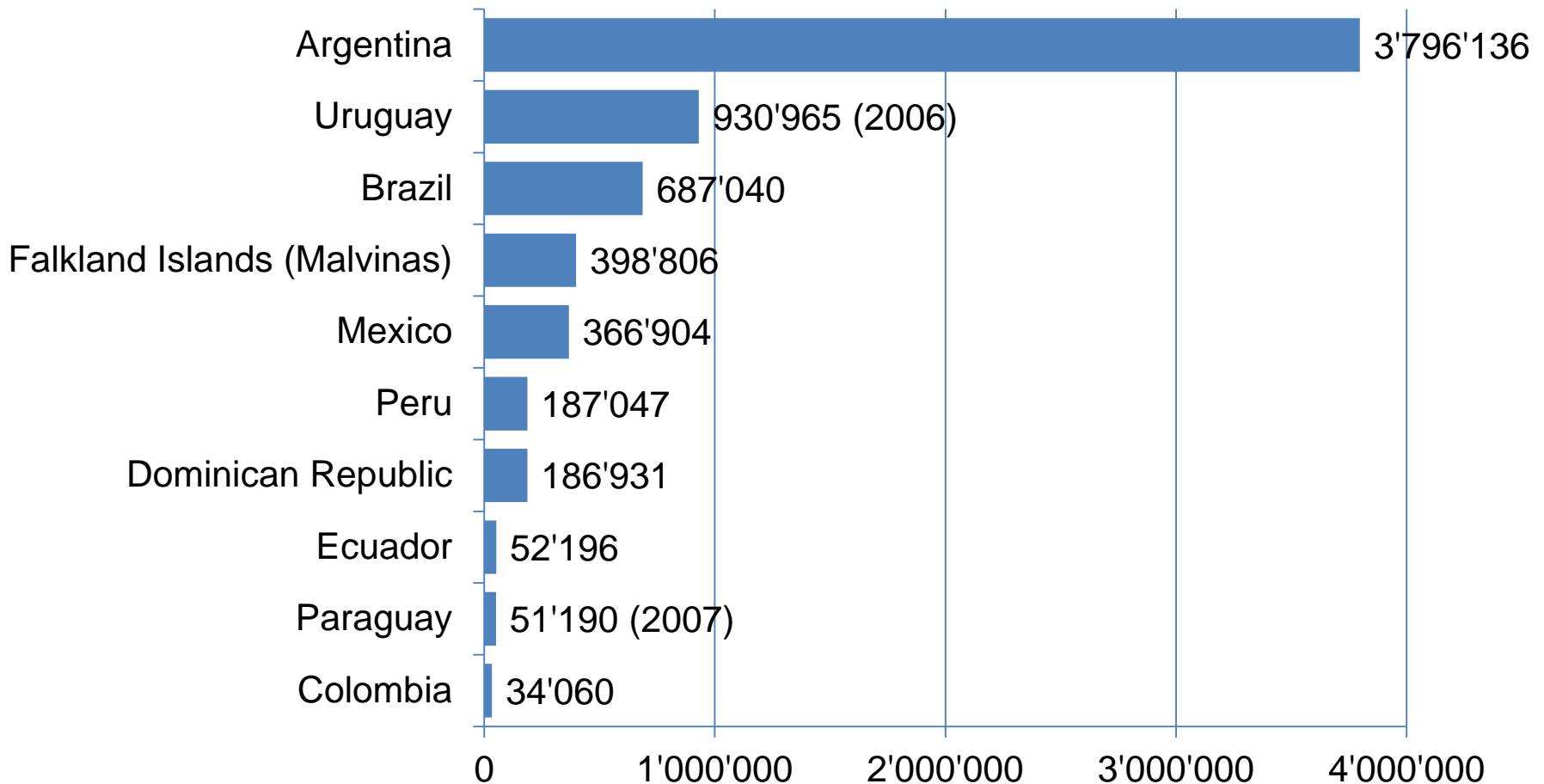
# Latin America: Key figures 2011

- › Most organic products from Latin American countries are sold on the European, North American or Japanese markets. Popular goods are especially those that cannot be produced in these regions, as well as off-season products.
- › Thus, the development of robust local markets is still a major challenge, without which the sustainability of organic production cannot be achieved. Important crops are tropical fruits, grains and cereals, coffee, cocoa, sugar, and meats. Most organic food sales in the domestic markets of the countries occur in major cities.
- › Twenty-two countries have legislation on organic farming, and two additional countries are currently developing organic regulations. Costa Rica and Argentina have both attained Third Country status according to the EU regulation on organic farming.

# Latin America/Caribbean: Distribution of organic agricultural land by country 2011 (total: 6.9 million hectares)

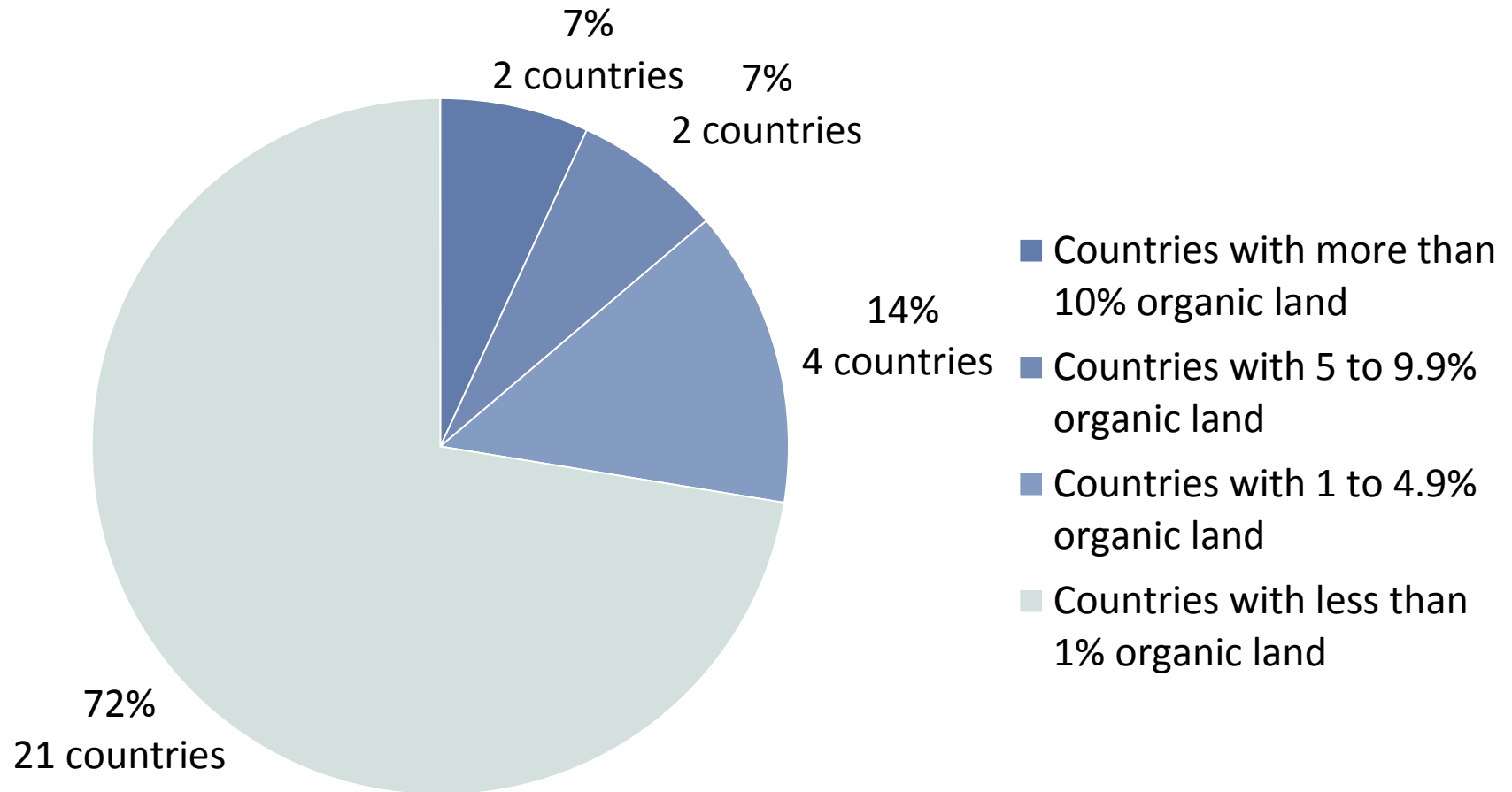


# Latin America/Caribbean: The ten countries with the most organic agricultural land 2011



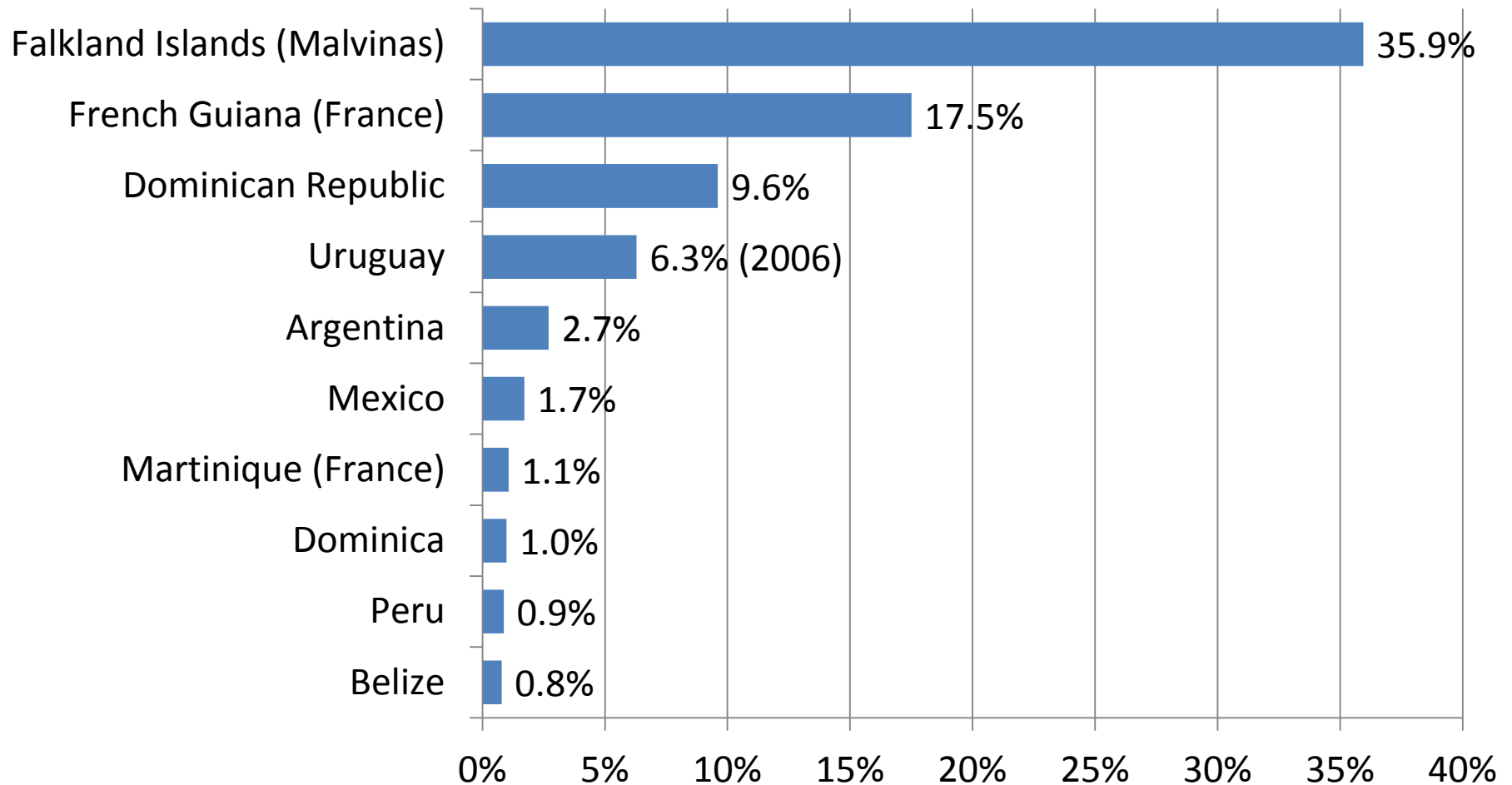
Argentina and Uruguay: Only fully converted area  
Hectares

# Latin America: Distribution of shares of organic land 2011

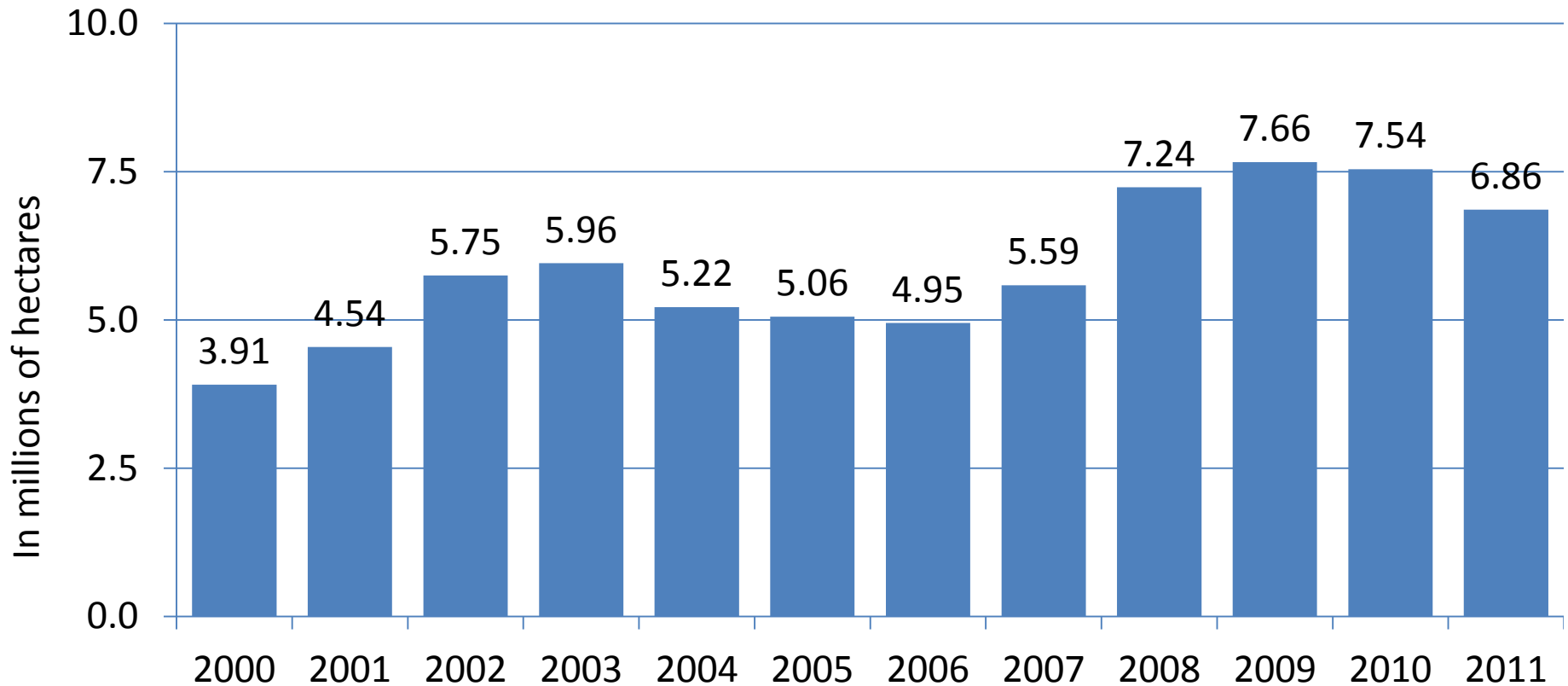




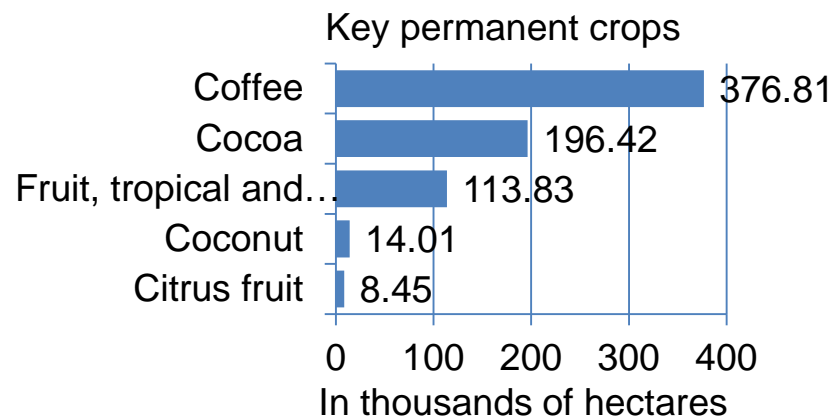
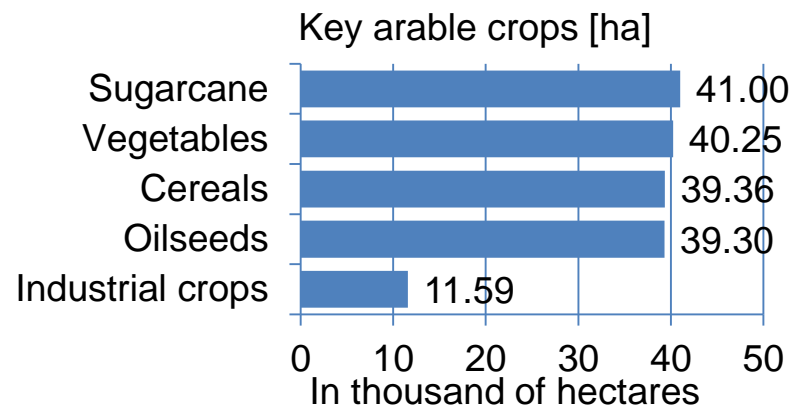
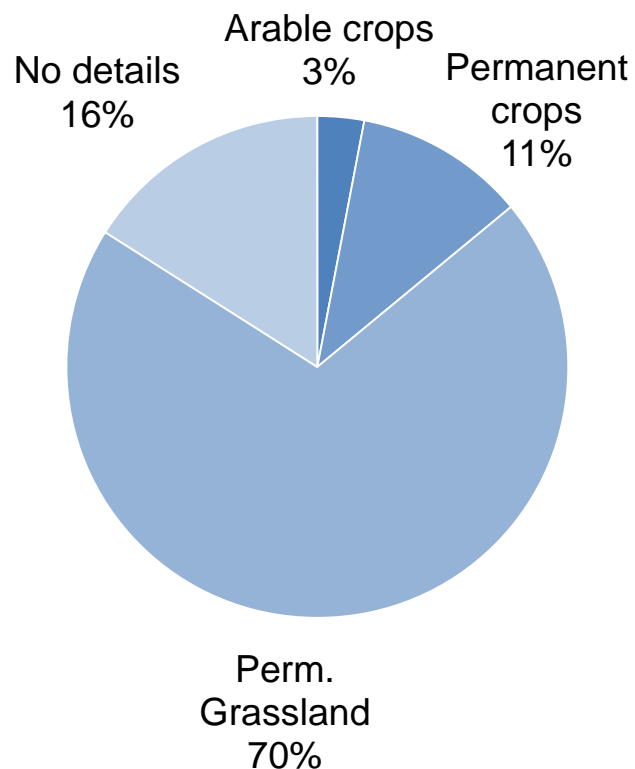
# Latin America: The ten countries with the highest shares of organic agricultural land 2011



# Latin America: Development of organically managed agricultural land 2000-2011



# Latin America: Use of organic agricultural land 2011 (total: 6.9 million hectares)



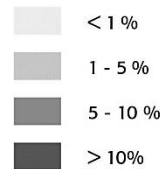
# Articles about Latin America and the Caribbean in the 2013 Edition of "The World of Organic Agriculture"

- › Organic Agriculture in Latin America and the Caribbean  
Patricia Flores Escudero

# North America: Organic agricultural land by country 2011



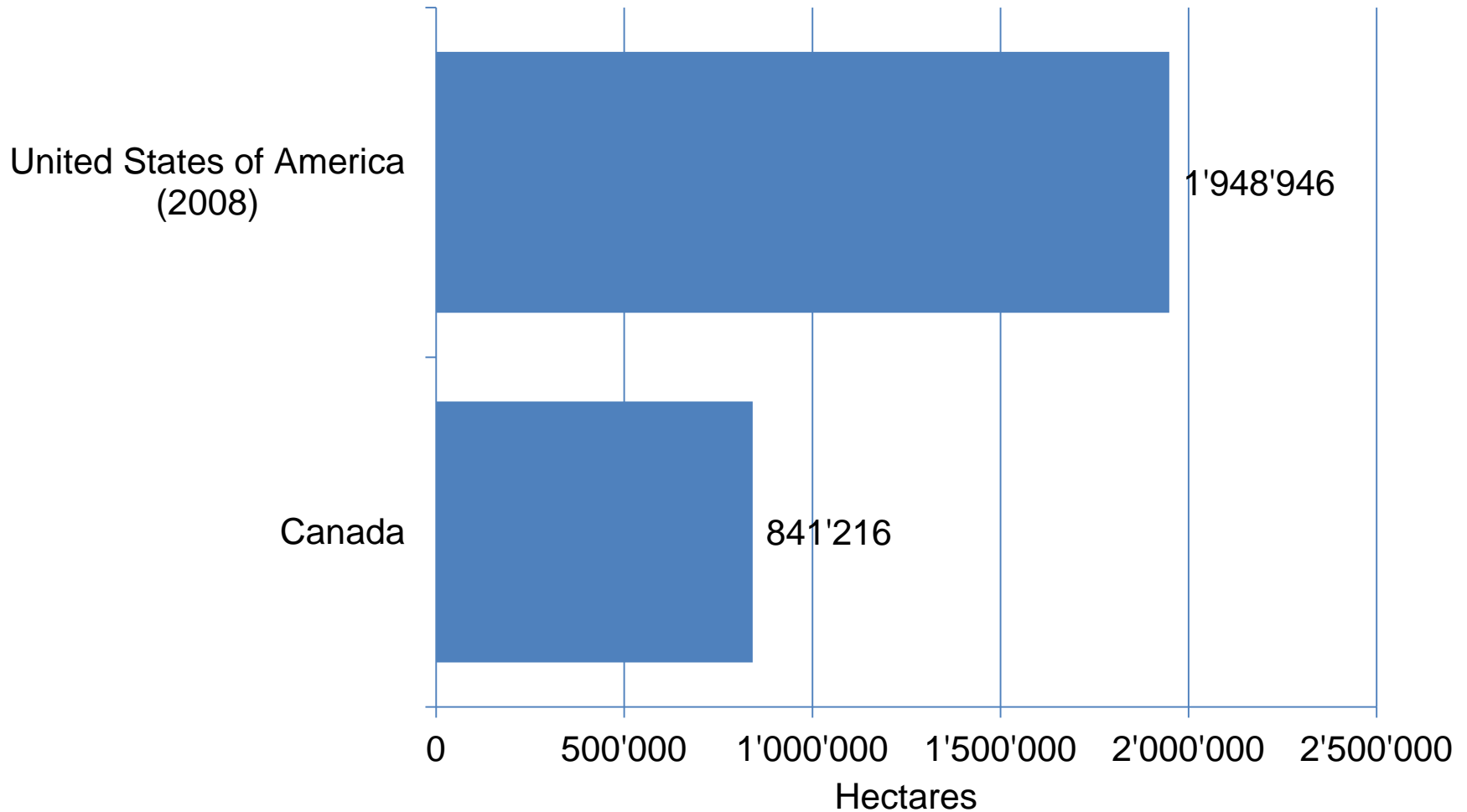
Share of organic agricultural land



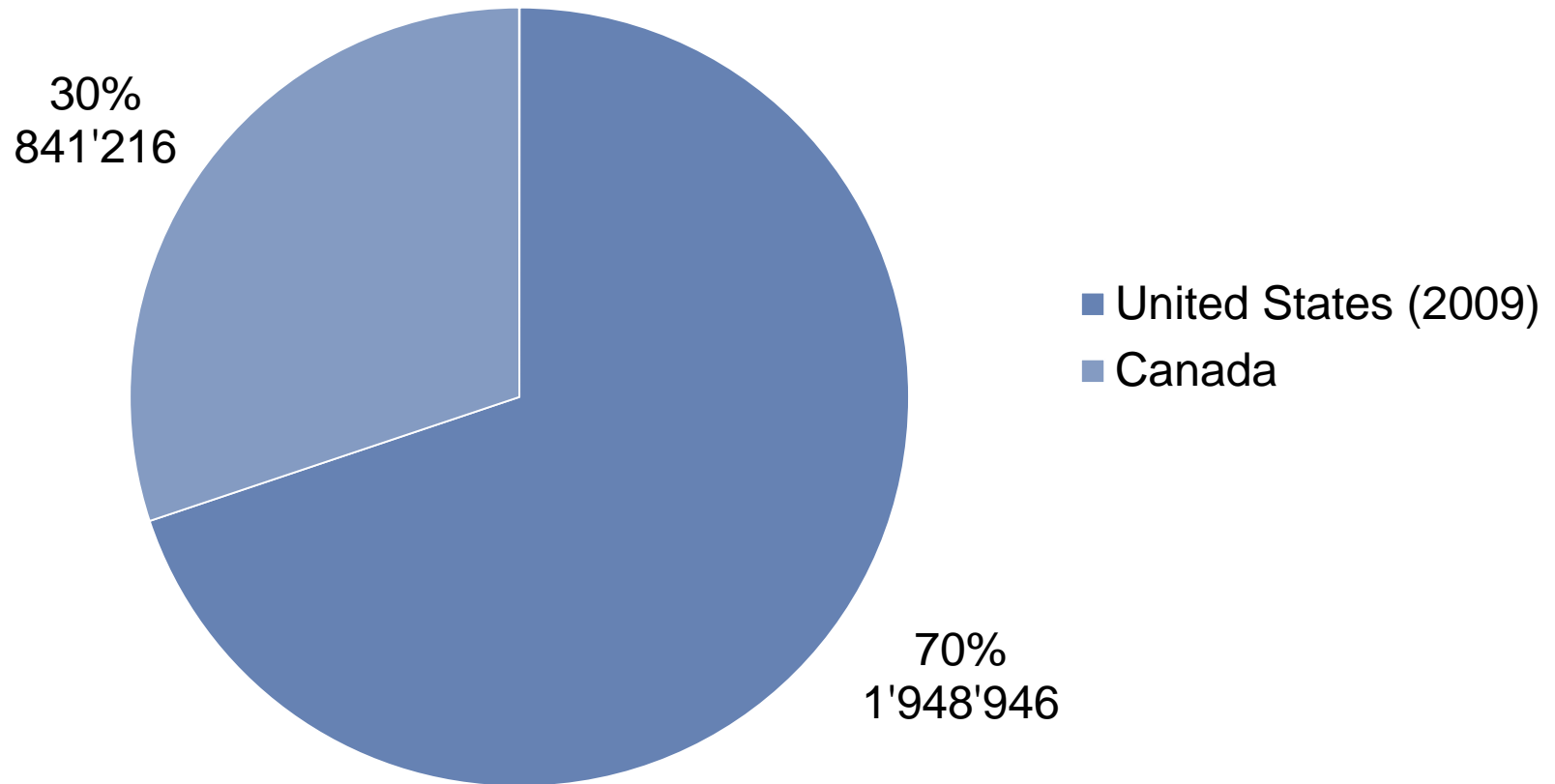
# Organic Agriculture in North America: Key figures 2011

- › In North America, almost 2.8 million hectares are managed organically, of these nearly two million in the United States and 0.8 million in Canada.
- › This represents 0.7 percent of the total agricultural area in the region and more than 7 percent of the world's organic agricultural land. .
- › In the US, 29.22 billion US dollars were spent on organic food, which constituted 4.2 percent of the food market. A further 2.2 billion US dollars were sales of organic non-foods (2011). In Canada, organic food sales were 2.6 billion Canadian dollars (2010).
- › Projections for 2012 and beyond indicate higher growth rates for organic sales in North America.

# North America: Organic agricultural land 2011

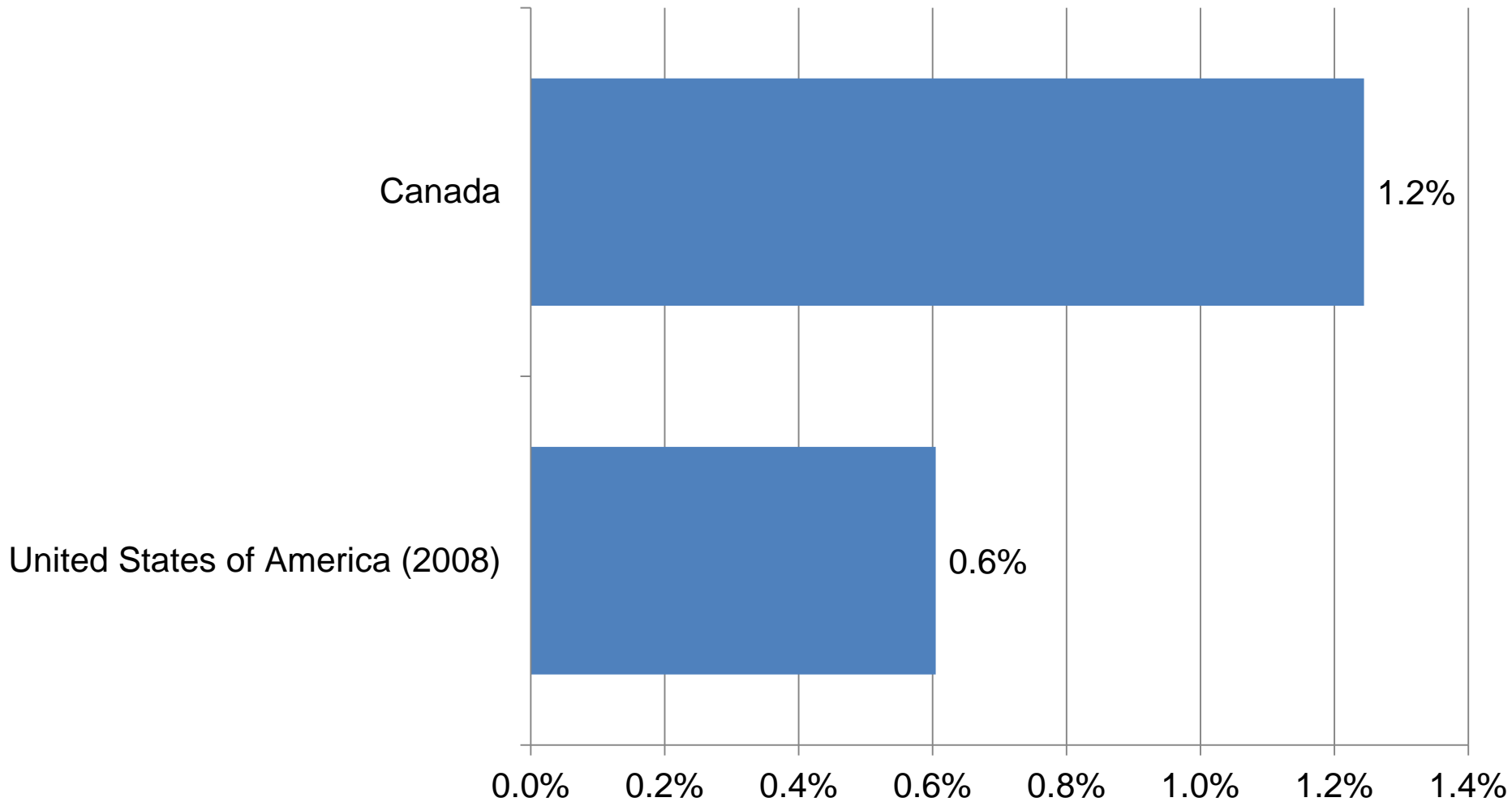


# North America: Distribution of organic agricultural land by country 2011 (Total: 2.8 million hectares)

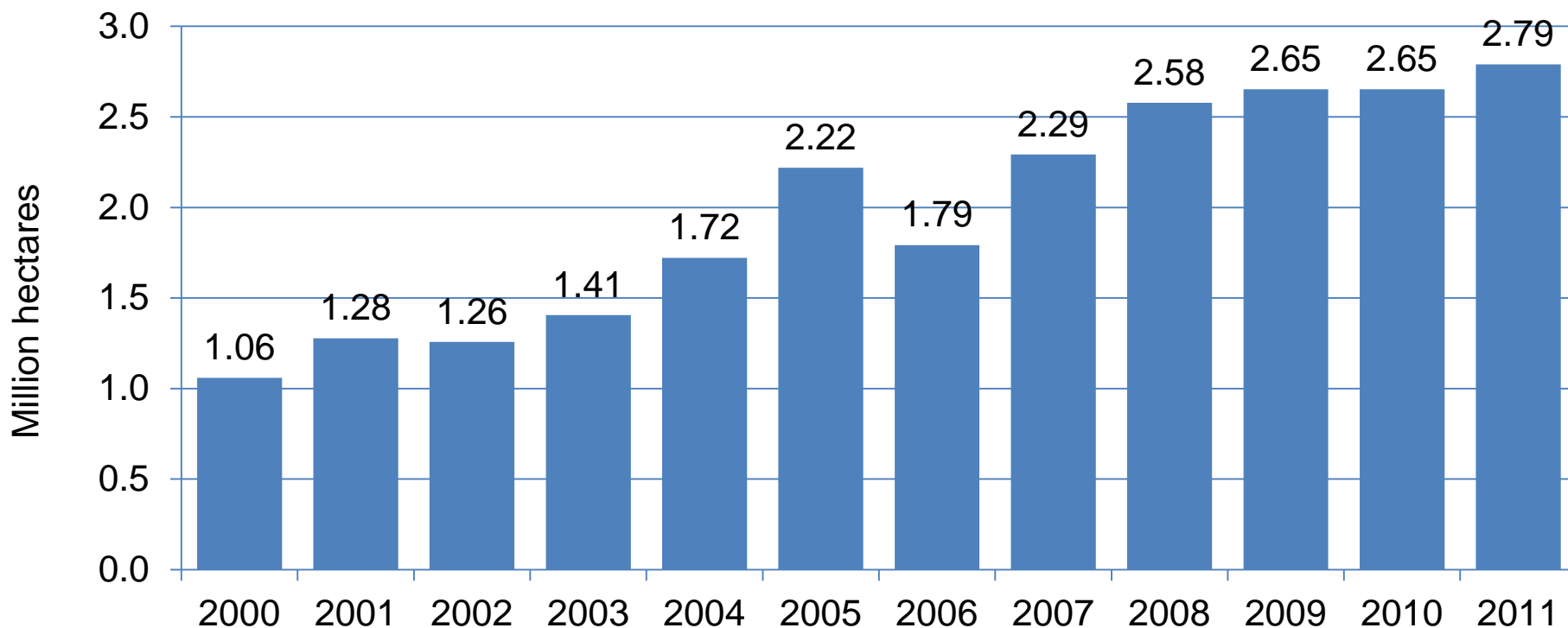




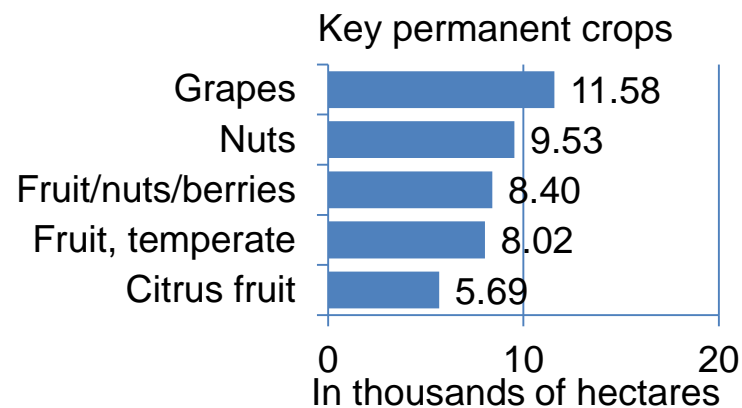
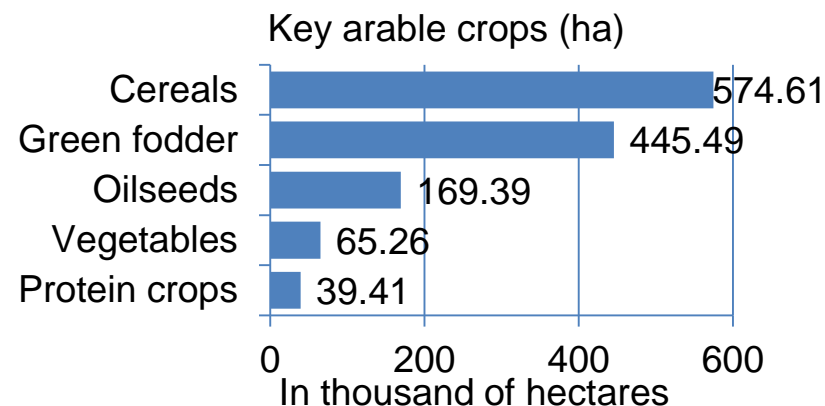
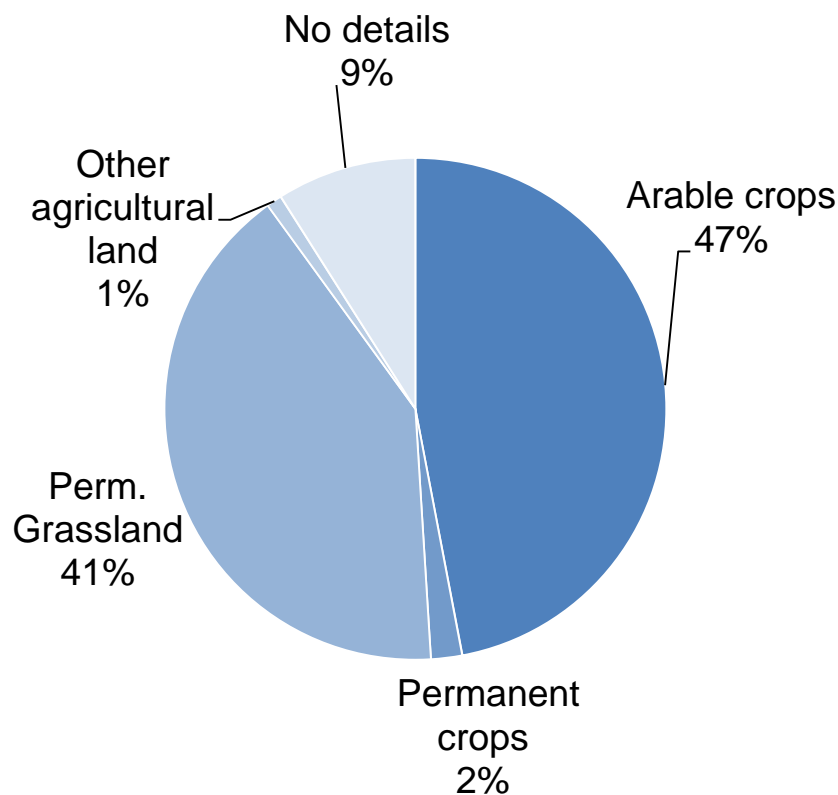
# North America: Shares of organic agricultural land 2011



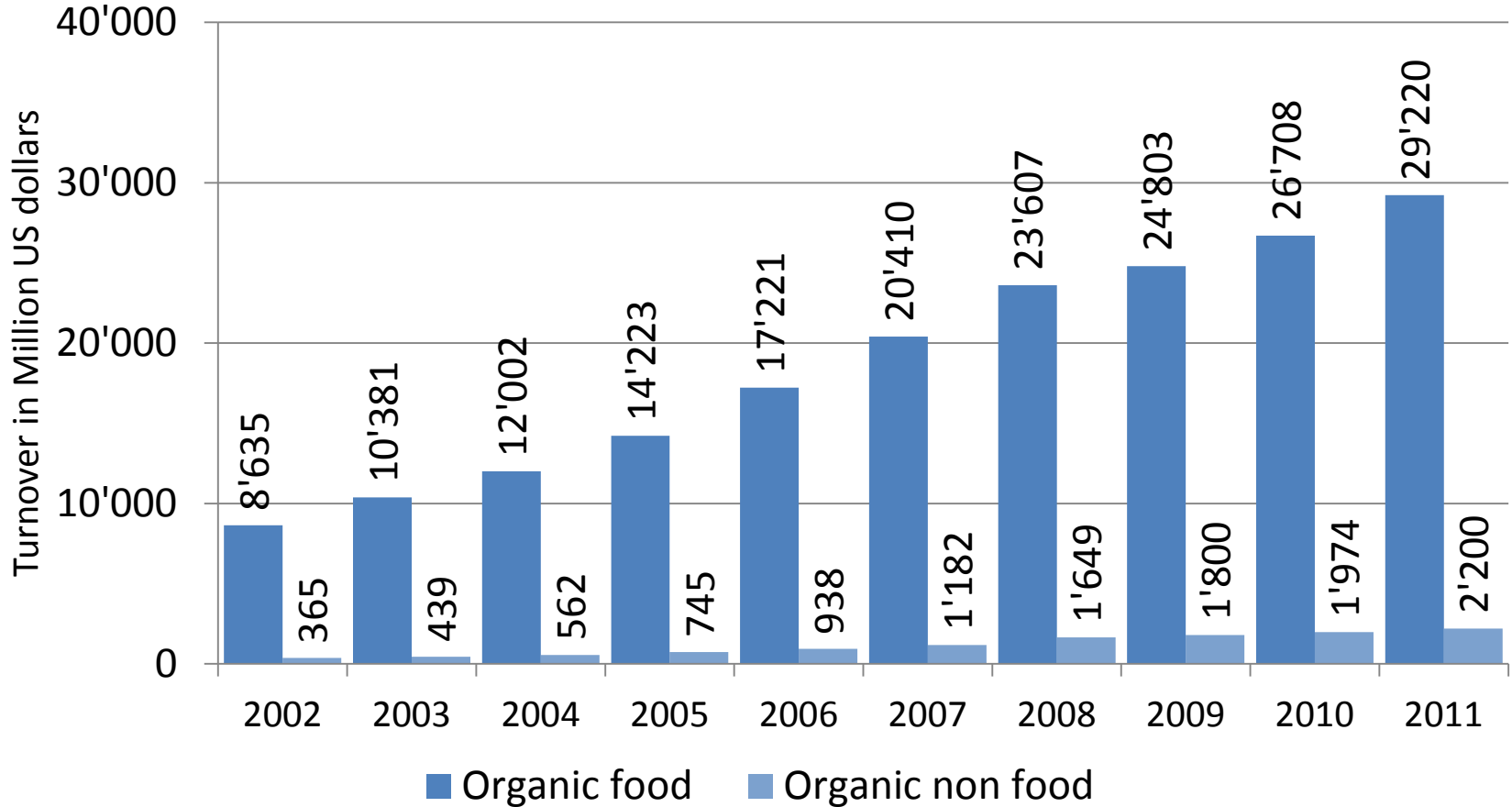
# North America: Development of organic agricultural land 2000-2011



# North America: Use of organic agricultural land 2011\* (total: 2.8 million hectares)



# Development of the US Organic market



# Articles about North America in the 2013 Edition of "The World of Organic Agriculture"

- › United States of America  
Barbara Fitch Haumann
- › Canada  
Matthew Holmes and Anne Macey
- › All in Willer/Lernoud/Kilcher (Eds.) 2013: The World of Organic Agriculture. Statistics and Emerging Trends 2013. IFOAM and FiBL, Bonn and Frick

# Oceania: Organic agricultural land by country 2011



# Organic agriculture in Oceania: Key figures 2011

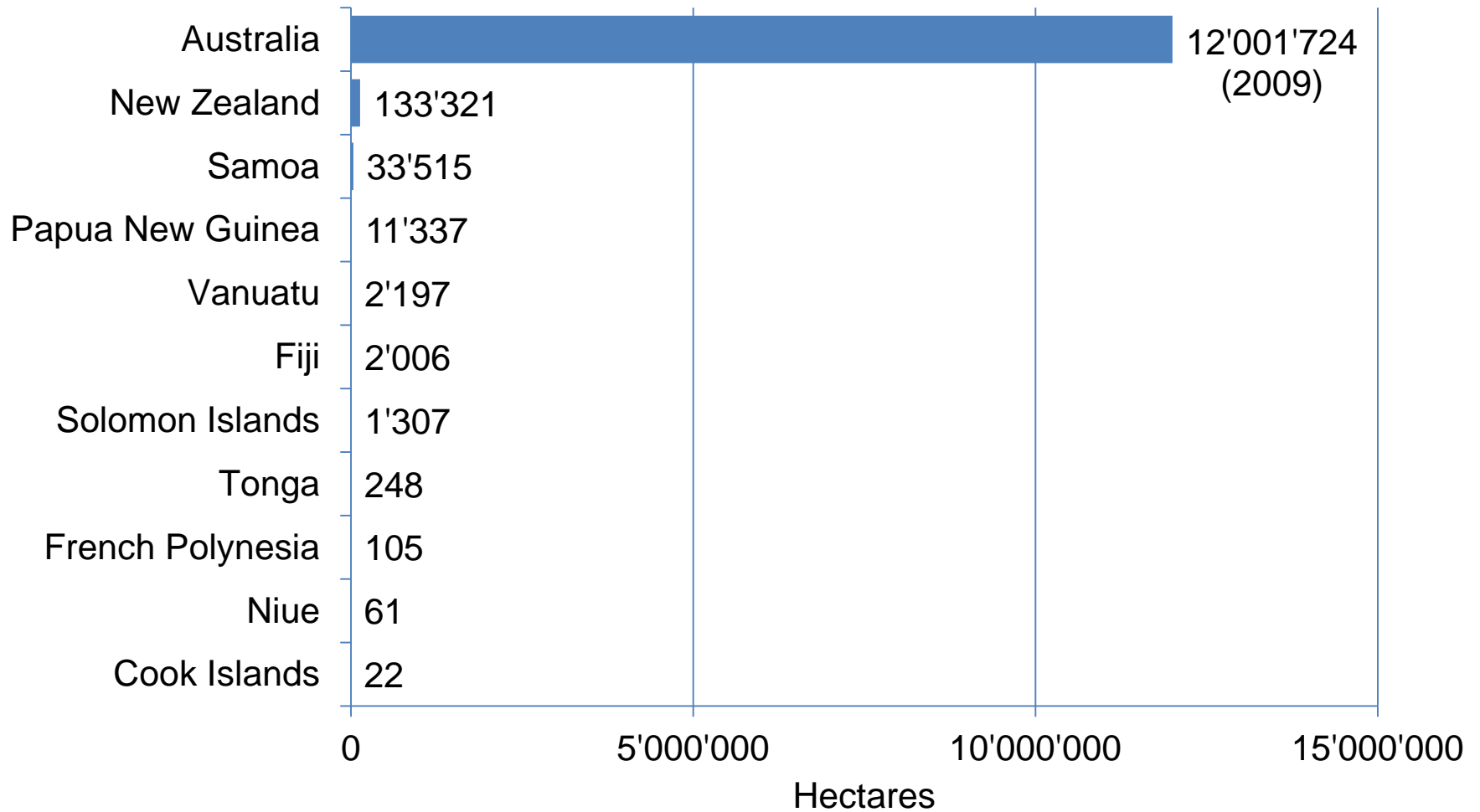
- › This region includes Australia, New Zealand, and island states like Fiji, Papua New Guinea, Tonga, and Vanuatu.
- › Altogether, there are 13'763 producers, managing 12.2 million hectares.
- › This constitutes 2.9 percent of the agricultural land in the area and almost 33 percent of the world's organic land.
- › Ninety-eight percent of the organic land in the region is in Australia (12 million hectares, 97 percent of which is extensive grazing land), followed by New Zealand (133'321 hectares), and Samoa (33'515 hectares).
- › The highest shares of all agricultural land are in Samoa (11.8 percent), followed by Australia (2.9 percent), Solomon Islands (1.6 percent), and Niue (1.2 percent).

# Organic agriculture in Oceania: Key figures 2011

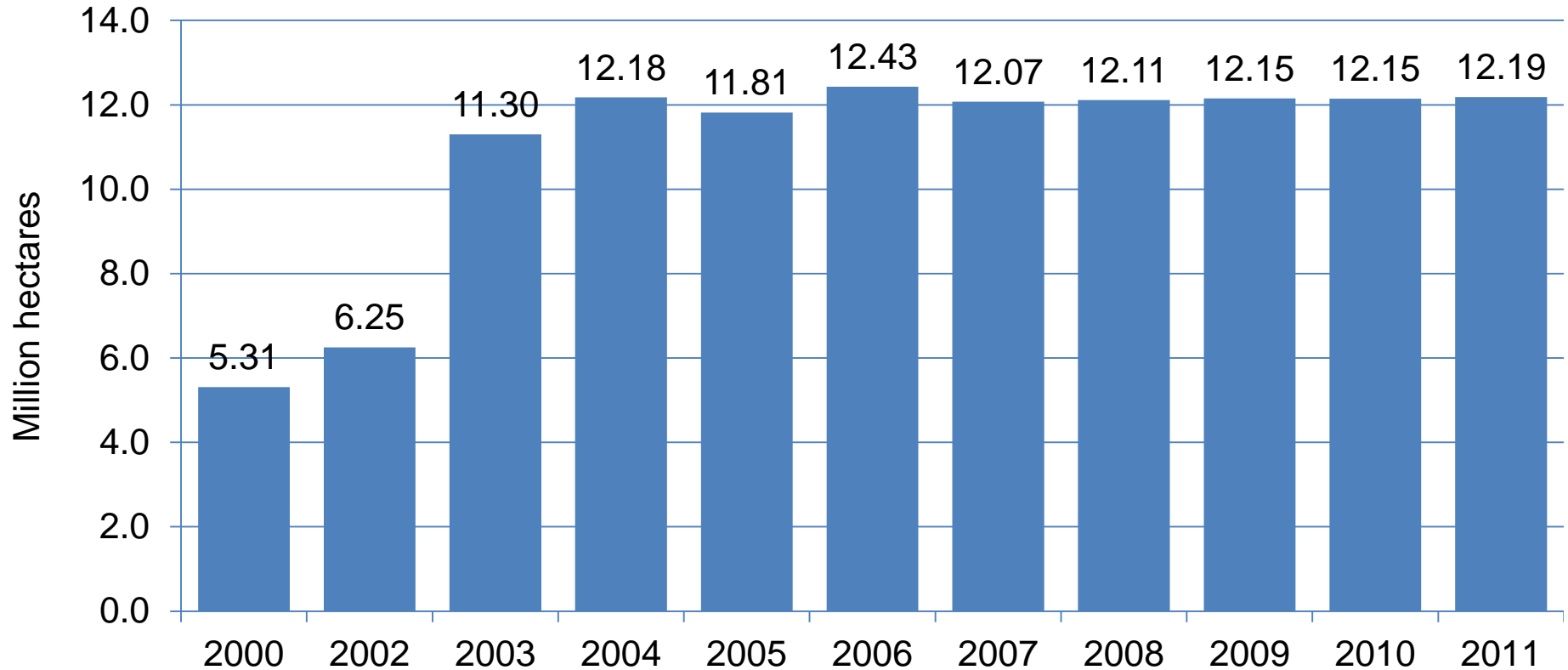
- › Growth in the organic industry in Australia, New Zealand and the Pacific Islands has been strongly influenced by rapidly growing overseas demand; domestic markets are, however, also growing. In Australia it was at 1'270 million Australian dollars and in New Zealand at 360 million New Zealand dollars.
- › The biggest change in the Australian domestic market over 2009 was that the Australian Standard for Organic and Biodynamic Products was adopted and published by Standards Australia.
- › The year 2010 marked a milestone for the Pacific Region: The International Organic Accreditation Service ([www.ioas.org](http://www.ioas.org)) assessed the Pacific Organic Standard (POS) and found it to be equivalent to the standards requirements of the European Union's organic regulations.



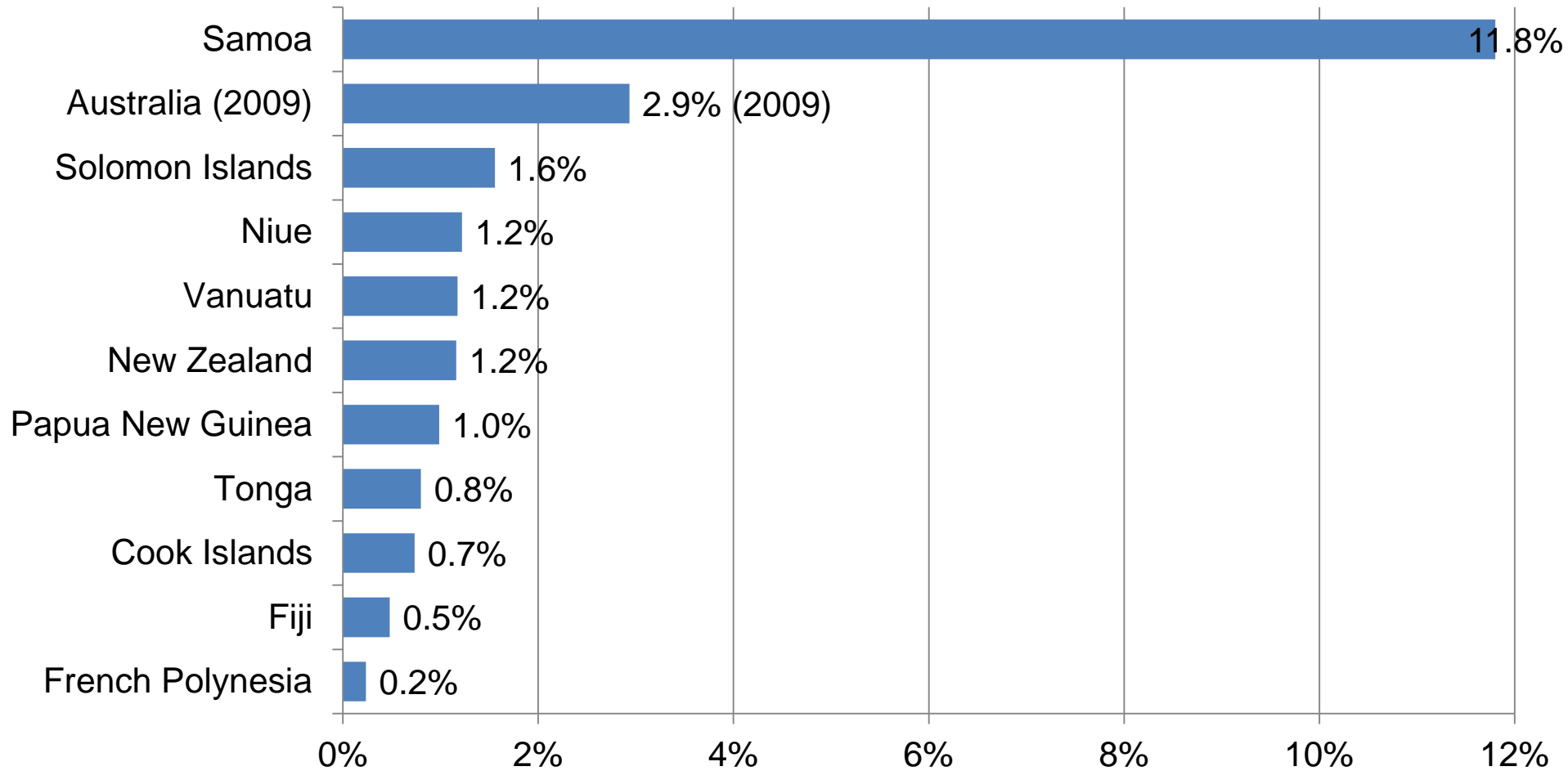
# Oceania: Organic agricultural land 2011



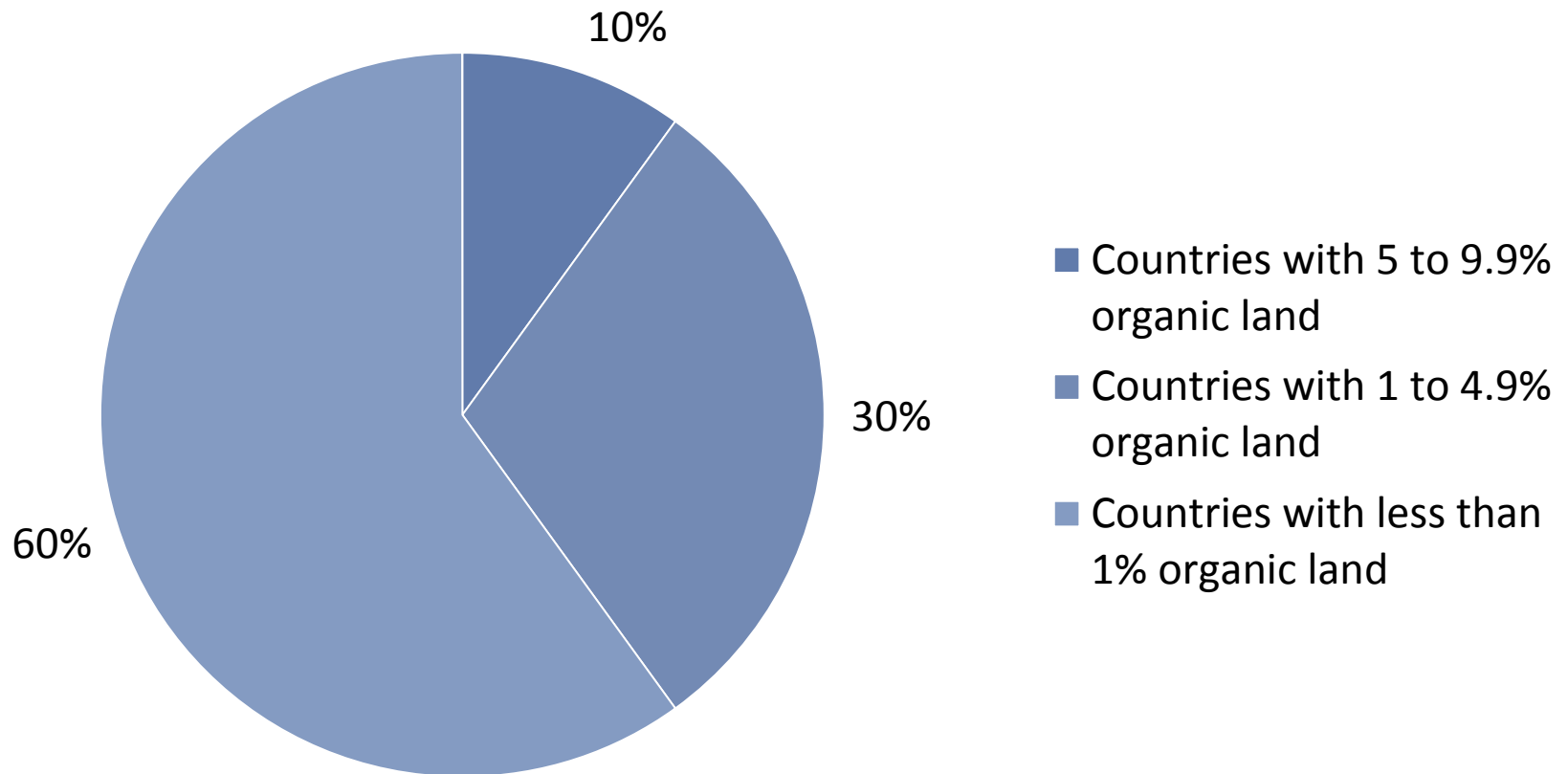
# Oceania: Development of organic agricultural land 2000-2011



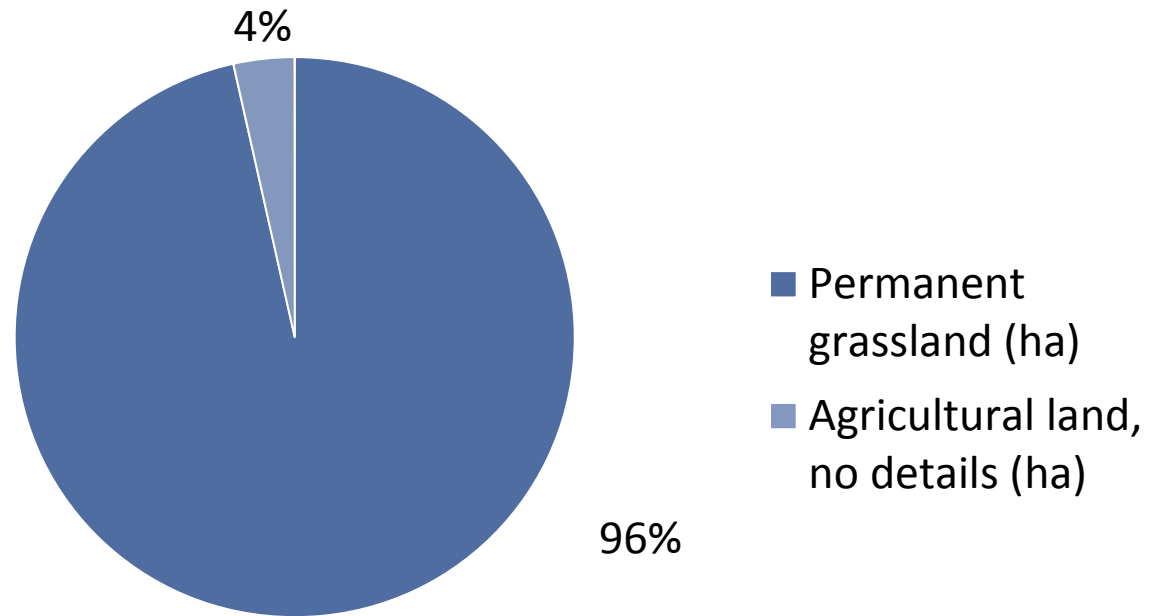
# Oceania: Shares of organic agricultural land 2011



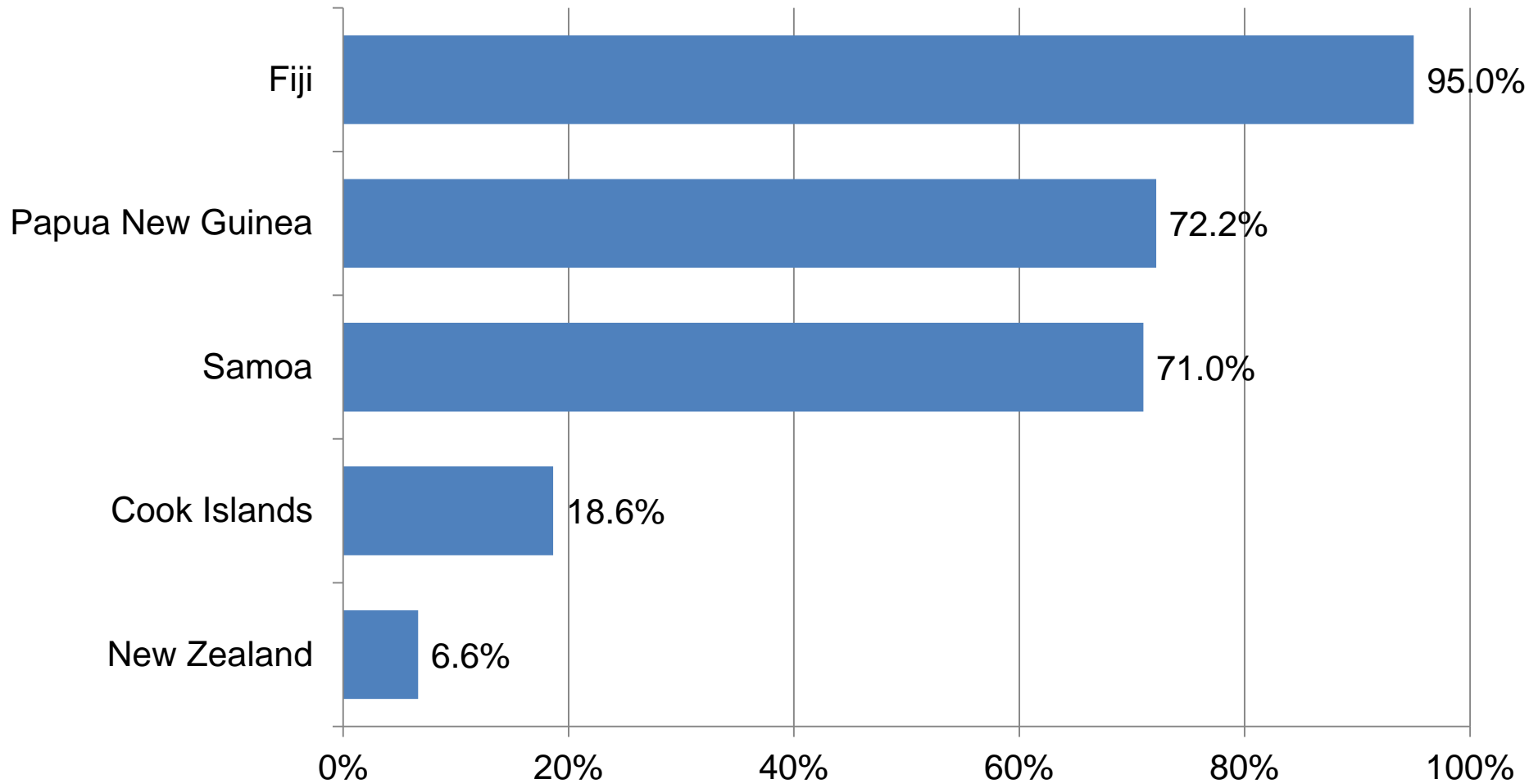
# Oceania: Distribution of shares of organic land 2011



# Oceania: Use of organic agricultural land 2011 (total: 12.2 million hectares)



# Oceania: Top five countries with the largest growth of organic agricultural land in 2011



# Articles about Oceania in the 2013 Edition of "The World of Organic Agriculture"

- › Organic Farming in Australia  
Els Wynen and Alexandra Mitchell
- › Organic Agriculture in the Pacific Islands  
Karen Mapusua
- › All in Willer/Lernoud/Kilcher (Eds.) 2013: The World of Organic Agriculture. Statistics and Emerging Trends 2013. FiBL and IFOAM, Bonn and Frick

# References and data sources

- › FiBL\* and IFOAM\*\* (2013): Data on organic agriculture world-wide. In: FiBL& IFOAM (2013): The World of Organic Agriculture. Statistics and Emerging Trends. Frick and Bonn
- › FiBL\*, AMI\*\*\* and IFOAM\*\*: Organic market data. In: FiBL& IFOAM (2013): The World of Organic Agriculture. Statistics and Emerging Trends. Frick and Bonn
- › Willer, Helga and Julia Lernoud (2013): Current Statistics on Organic Agriculture Worldwide: Organic Area, Producers and Market. In: FiBL& IFOAM (2013): The World of Organic Agriculture. Statistics and Emerging Trends 2013. Frick and Bonn.
- › For detailed data sources by country please check <http://www.organic-world.net/fileadmin/documents/yearbook/2013/web-fibl-ifoam-2013-320-340.pdf>
- › \*FiBL= Research Institute of Organic Agriculture, Switzerland; \*\*IFOAM = International Federation of Organic Agriculture Movements, Germany; \*\*\*AMI = Agricultural Information Company, Germany
- › More information at <http://www.organic-world.net/yearbook-2013.html>