FiBL AND IFOAM

THE WORLD OF ORGANIC AGRICULTURE

STATISTICS & EMERGING TRENDS 2014

OCEANIA 12.2 MILLION HA

EUROPE 11.2 MILLION HA

LATIN AMERICA 6.8 MILLION HA

ASIA 3.2 MILLION HA

NORTH AMERICA 3.0 MILLION HA

AFRICA 1.1 MILLION HA

Supported by

Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Confederation

Federal Department of Economic Affairs,
Education and Research EAER
State Secretariat for Economic Affairs SECO

BIOFACH
into organic

www.organic-africa.net

AFRICAN ORGANIC AGRICULTURE TRAINING MANUAL

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

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

The training materials include:

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

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

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

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

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

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

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

FiBL and IFOAM

The World of Organic Agriculture

Statistics and Emerging Trends 2014

For supplementary material see
http://www.organic-world.net/yearbook-2014.html

This document has been produced with the support of the Swiss State Secretariat for Economic Affairs (SECO) and NürnbergMesse. The views expressed herein can in no way be taken to reflect the official opinions of SECO or NürnbergMesse.
Some work for this publication was undertaken as part of the research project titled "Data network for better European organic market information" (OrganicDataNetwork). This project has received funding from the European Union's Seventh Framework Programme for research, technological development and demonstration under grant agreement no 289376. The opinions expressed in this contribution are those of the authors and do not necessarily represent the views of the European Commission.

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

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

Please quote articles from this book individually with name(s) of author(s) and title of article. The same applies to the tables: Please quote source, title of table and then the overall report. The whole report should be cited as:

Willer, Helga and Julia Lernoud (Eds.) (2014)
The World of Organic Agriculture. Statistics and Emerging Trends 2014. FiBL-IFOAM Report.
Research Institute of Organic Agriculture (FiBL), Frick, and International Federation of Organic Agriculture Movements (IFOAM), Bonn. Revised version of February 24, 2014

Die Deutsche Bibliothek – CIP Cataloguing-in-Publication-Data
A catalogue record for this publication is available from Die Deutsche Bibliothek

Research Institute of Organic Agriculture (FiBL), Ackerstrasse, 5070 Frick, Switzerland,
Tel. +41 62 865 72 72, Fax +41 62 865 72 73, e-mail info.suisse@fibl.org, Internet www.fibl.org
International Federation of Organic Agriculture Movements (IFOAM) e.V., Charles-de-Gaulle-Str. 5, 53113 Bonn, Germany, Tel. +49 228 926 50-10, Fax +49 228 926 50-99, e-mail headoffice@ifoam.org, Internet www.ifoam.org, Trial Court Bonn, Association Register no. 8726
Language editing: Robert Home, FiBL, Frick, Switzerland
Layout: Julia Lernoud and Helga Willer, FiBL, Frick, Switzerland
Cover & maps: Daniel Gorba, FiBL, Frick, Switzerland
Cover picture: Winter peas in Germany. Currently new, hardy varieties are bred. In organic farming, peas are important for nitrogen fixation and as a protein-rich feed crop. Picture: Klaus-Peter Wilbois, FiBL Germany, Frankfurt
Graphs (if not otherwise stated): Julia Lernoud and Helga Willer, FiBL, Frick, Switzerland
Printed by Medienhaus Plump, Rolandsecker Weg 33, 53619 Rheinbreitbach, Germany
Price: 25 Euros, IFOAM members: 20 Euros
Printed copies of this volume may be ordered directly from IFOAM and FiBL (see addresses above) or via the IFOAM website at www.ifoam.org or the FiBL shop at shop.fibl.org
ISBN FiBL 978-3-03736-251-8, ISBN IFOAM 978-3-944-372-08-2

Table of Contents

Table of Contents

Tables

Figures

Maps

Foreword from SECO

This book provides a clear statement on the persistence of the organic trend. On the consumer side, organic products with a total value of almost 64 billion US dollars were sold globally in 2012. A growth rate of up to 10 percent was recorded in the most advanced markets for organic products. The market in the United States grew by 10 percent, and in Switzerland – evolving since many years on a very high level – it still grew by 5 percent. The production side is also keeping pace: The latest data for 2012 show that organic farmland, even though stable at the global level, has grown in many countries. In particular, for some tropical crops such as coconuts and coffee, area growth rates of more than 10 percent were reached in 2012. Three "new" countries: Angola, Bermuda, and San Marino, have joined the community of organic producers so there are now 164. A major issue is the difference between the volume of sustainable production and the volume effectively sold as certified. For example, in cacao, it is remarkable that a high percentage of organic production is sold as certified, which is significantly above average of Voluntary Sustainability Standards (VSS)[1] in general.[2]

Another challenge is the share of organic production in the total world volume; particularly compared to the overwhelming majority of "conventional" production. For cocoa, organic production represents only about 2.1 percent, and for banana, even less than one percent of the total world production. Increasingly, the organic label is also in "competition" with other VSS. For tea, organic has the smallest share of all VSS, but with 21 countries, has the highest world coverage for certified tea production. Organic volumes of cotton have stagnated - partly because of a shift in demand to other initiatives. On the other hand, double certification by Fairtrade and organic, for example in sugar, is increasing.

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

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

Hans-Peter Egler
Head of the Division for Trade Promotion
Swiss State Secretariat for Economic Affairs
SECO
Bern, Switzerland

[1] According to the United Nations Forum on Sustainability Standards (UNFSS), so-called voluntary sustainability standards (VSS), also termed private standards, claim to improve the health, occupational safety, economic, social, environmental, or animal-welfare conditions under which products are made.For more information see http://unctad.org/en/pages/newsdetails.aspx?OriginalVersionID=425

[2] Potts, Jason et al. (2014): The State of Sustainability Initiatives Review 2014. Standards and the Green Economy. IISD, Winnipeg, and IIES, London. Available at www.sustainablecommodities.org/ssi/background

Foreword from FiBL and IFOAM

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

With this edition, FiBL and IFOAM are presenting "The World of Organic Agriculture" for the 15th time. The data and information compiled in this volume document the current statistics, recent developments, and trends in global organic farming. The statistical information and all chapters have been updated. As in previous editions, selected country reports were also compiled.

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

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

Furthermore, we are happy to count on the continuous support of NürnbergMesse, the organizers of the BIOFACH, the World's leading Trade Fair for Organic Food.

Frick and Bonn, February 2014

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

Markus Arbenz
Executive Director
International Federation of Organic
Agriculture Movements (IFOAM)
Bonn, Germany

Acknowledgements

The Research Institute of Organic Agriculture (FiBL) and the International Federation of Organic Agriculture Movements (IFOAM) are very grateful to their sponsors for granting financial support for the global data collection and for the 2014 edition of "The World of Organic Agriculture": the Swiss State Secretariat for Economic Affairs (SECO), Economic Development and Cooperation (within the framework of its support activities for organic production in developing countries), Bern, Switzerland, and NürnbergMesse, the organizers of BIOFACH, Nürnberg, Germany.

Numerous individuals have contributed to the making of this work. The editors are very grateful to all those listed below, without whom it would not have been possible to produce this global statistical yearbook.

Gyorgyi Acs Feketene, Control Union Certifications, AD Zwolle, Netherlands; **Olugbenga O. AdeOluwa**, University of Ibadan, Ibadan, Nigeria; **Raymond Aendekerk**, Institut fir biologesch Landwirtschaft an Agrarkultur asbl IBLA Luxemburg, Munsbach, Luxemburg; **Raymond Auerbach**, Nelson Mandela Motropolitan University, George, South Africa; **Uygun Aksoy**, Ege University, Bornova Izmir, Turkey; **Lina Al Bitar**, Centro Internazionale di Alti Studi Agronomici Mediterranei - Istituto Agronomico Mediterraneo di Bari - CIHEAM- IAM Bari, Valenzano (BA), Italy; **Gulzaada Aleshova**, Helevtas, Jalalabad, Kyrgyz Republic; **Mohammed Al-Oun**, Jordan National Centre for Research and Development, Jordan; **Saif Moh Al-Shara**, Ministry of Environment and Water, Agricultural Affairs and Animal Sector, Dubai, United Arab Emirates; **Mirit Amrani**, Ministry of Agriculture and Rural Development, Israel; **Stoilko Apostolov**, Bioselena: Foundation for organic agriculture, Karlovo, Bulgaria; **Markus Arbenz**, International Federation of Organic Agriculture Movements IFOAM, Bonn, Germany; **Lidya Ariesusanty**, Indonesia Organic Alliance IOA, Bogor, Indonesia; **Elhag Meki Ali Awouda**, Federal Ministry Of Agriculture& Irrigation, Sudan; **Roberto Azofeifa**, Ministerio de Agricultura y Ganadería, La Sabana, San José, Costa Rica; **Vugar Babayev**, Ganja Agribusiness Association (GABA), Ganja city, Azerbaijan; **Khaoula Baghdadi**, Ministère de l'Agriculture, des Ressources Hydrauliques et de la Pêche, Tunis, Tunisia; **Verena Batlog**, GIZ Bolivia, La Paz, Bolivia; **Lukas Baumgart**, Forschungsinstitut für biologischen Landbau, FiBL, Frick, Switzerland; **Andrew Bayliss**, Soil Association Certification Limited, Bristol, UK; **Milena Belli**, Istituto per la Certificazione Etica ed Ambientale (ICEA), Bologna, Italy; **Mohamed Ben Kheder**, Centre Technique de l'Agriculture Biologique, Sousse, Tunisia; **Paulina Betancourt**, Agrocalidad, Quito, Bolivia; **Olivera Bicikliski**, Ministry of Agriculture, Forestry and Water Management (MZSV), Skopje, Former Yugoslav Republic of Macedonia; **Marian Blom**, Bionext, LC Utrecht, Netherlands; **Barbara Böck**, BIOFACH - World's leading Trade Fair for Organic Food, Nürnberg, Germany; **Hervé Bouagnimbeck**, IFOAM Africa Office, Bonn, Germany; **Thavisith Bounyasouk**, Department of Agriculture (DOA), Vientiane, Lao PDR; **Lorcan Bourke**, Bord Bia - Irish Food Board, Dublin 2, Ireland; **Trevor Brown**, Jamaica Organic Agriculture Movement JOAM, Kingston 6, Jamaica; **Marie Reine Bteich**, Centro Internazionale di Alti Studi Agronomici Mediterranei - Istituto Agronomico Mediterraneo di Bari - CIHEAM- IAM Bari, Bari,

Italy; **Klaus Büchel**, Klaus Büchel Anstalt, Mauren, Liechtenstein; **Stefan Bühler**, Bio Test Agro AG, Münsingen, Switzerland; **Andreas Bürkert**, Universität Kassel, Fachbereich Ökologische Agrarwissenschaften University of Kassel, Faculty of Organic Agricultural Sciences, Witzenhausen, Germany; **Diana Callear**, Afrisco, Lynnwood Ridge, South Africa; **Flávia Castro**, International Federation of Organic Agriculture Movements IFOAM, Bonn, Germany; **Udo Censkowsky**, Organic Services, München, Germany; **Jennifer Chang**, Korean Federation of Sustainable Agriculture Organizations (KFSA), Seoul, Republic of Korea; **Allal Chibane**, Ministère de l'Agriculture et de la Pêche Maritime, Rabat, Morocco; **Stanley Chidaya**, Malawi Organic Association, Lilongwe, Malawi; **Thomas Cierpka**, IFOAM - International Federation of Organic Agriculture Movements, Bonn, Germany; **Marian Cioceanu**, Bio Romania, Bucureşti, Romania; **Martin Cottingham**, United Kingdom; **Catarina Crisostomo**, Portugal; **Philip Cullen**, Department of Agriculture, Food and Rural Development, The Organic Farming Unit, Johnstown, Co. Wexford, Ireland; **Nune Darbinyan**, ECOGLOBE - Organic control and certification body, Yerevan, Republic of Armenia; **Enrico de Ruvo**, ISMEA, Research institute for agriculture and market studies, Roma, Italy; **Koen den Braber**, Hanoi, Vietnam; **Famara Diédhioe**, National Federation for Organic Agriculture, AGRECOL, Thiès, Sénégal; **Dóra Drexler**, Hungarian Research Institute of Organic Agriculture (ÖMKi), Budapest, Hungary; **Loli Edeso**, Ruta, San José, Costa Rica; **Pilar M. Eguillor Recabarren**, Oficina de Estudios y Politicas Agrarias ODEPA, Santiago Centro, Chile; **Lucy Ellis**, Department of Agriculture, Stanley FIQQ 1ZZ, Falkland Islands; **Sandra Elvir Sanchez**, SENASA HONDURAS, Secretaria de Agricultura y Ganadería, Tegucigalpa, Honduras; **Carlos Escobar**, ECONEXOS, Conexion Ecologica, Cali, Colombia, Cali, Colombia; **Angela Pernas Escosteguy**, Instituto do Bem-Estar, Porto Alegre, Brazil; **Monique Faber**, Administration des services techniques de l'agriculture (ASTA), Luxembourg; **Addisu Alemayehu Ferede**, Ethiopian Association of Organic Agriculture EAOA, Addis Ababa, Ethiopie; **Tobias Fischer**, BCS Öko-Garantie GmbH, Nürnberg, Germany; **Barbara Fitch Haumann**, Organic Trade Association (OTA), Brattleboro, United States; **Patricia Flores Escudero**, Representative of the Latin American and Caribbean Group of the International Federation of Organic Agriculture Movements (GALCI), Lima 33, Peru; **Emmeline Foubert**, Certisys, Walhain, Belgium; **Udo Funke**, BIOFACH - World's leading Trade Fair for Organic Food, Nürnberg, Germany; **Jordan Gama**, AfrONet, Dar es Salaam, Tanzania; **Salvador Garibay**, Forschungsinstitut für biologischen Landbau (FiBL) / Research Institute of Organic Agriculture, Frick, Switzerland; **Lisa Gauvrit**, ECOZEPT GbR, Montepllier; France; **Catherine Gerrard**, Organic Research Centre, Hamstead Marshall, Newbury, UK; **Maheswar Ghimire**, Kathmandu, Nepal; **Laurent C. Glin**, FiBL Regional Office for West Africa, Benin; **Denise Godinho**, IFOAM - International Federation of Organic Agriculture Movements, Bonn, Germany; **Miguel Gomez**, RUTA, San José, Costa Rica; **Victor Gonzálvez Pérez**, Sociedad Española de Agricultura Ecologica (SEAE) / Spanish Society for Organic Agriculture, Catarroja (Valencia), Spain; **Ana Goloborodco**, Ecocert, Bucuresti, Romania; **Daniel Gorba**, Forschungsinstitut für biologischen Landbau (FiBL), Frick, Switzerland; **David Gould**, International Federation of Organic Agriculture Movements IFOAM, Bonn, Germany; **P.V.S.M. Gouri**, Agricultural and Processed Food Products. Export Development

Authority, August Kranti Marg. New Delhi, India; **Catherine Greene**, Economic Research Service USDA, 20036-5831, Washington, DC, United States; **Simone Groh**, CERES - CERES - CERtification of Environmental Standards - GmbH, Happurg, Germany; **Iulia Grosulescu**, Ministry Of Agriculture and Rural Development, Bucharest, Romania; **Gunnar Á. Gunnarsson**, Vottunarstofan Tún ehf., Reykjavik, Iceland; **Roberto Guimarães Habib Mattar**, Ministério da Agricultura Pecuária e Abastecimento – MAPA, Brasília DF, Brazil; **Sarah Harris**, Department for Environment, Food and Rural Affairs (DEFRA), York, UK; **Marco Hartmann**, Organic Farming Project, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, GIZ International Services, Riyadh, Saudi Arabia; **Sampsa Heinonen**, Evira, Helsinki, Finland; **Ines Hensler**, Institut für Marktökologie IMO / Institute of Market Ecology, Switzerland; **Otto Hofer**, Lebensministerium/ BMLFUW, Wien, Austria; **Matthew Holmes**, Organic Trade Association, Canadian Office, Sackville, Canada; **Robert Home**, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland; **Monowar Hossein**, Horticulture Export Development Foundation, Dhaka, Bangladesh; **Andrea Hrabalová**, Institute of Agricultural Economics and Information, Brno, Czech Republic; **Beate Huber**, Forschungsinstitut für biologischen Landbau (FiBL) / Research Institute of Organic Agriculture, Frick, Switzerland; **Nizami Ibrahimli**, GABA Ganja Agribusiness Association, Ganja, Azerbaijan; **Edmundo Janco Mita**, Association of Organization of Ecological Producers from Bolivia, AOPEB, San Predro, Bolivia; **Bernd Jansen**, EkoConnect - International Centre for Organic Agriculture of Central and Eastern Europe e.V., Dresden, Germany; **Jorge Leonardo Jave Nakayo**, Ministerio de Agricultura - SENASA- Perú, Lima, Peru; **Josefine Johansson Zuazu**, IFOAM EU Group, Brussels, Belgium; **Jack Juma**, Kenya Organic Agricultural Network (KOAN), Nairobi, Kenya; **Marija Kalentic**, German International Cooperation GIZ, Novi Sad, Serbia; **Lani Katimbang-Limpin**, Organic Certification Center of the Philippines OCCP, Barangay Laging Handa, Quezon City, Philippines; **Joelle Katto-Andrighetto**, International Federation of Organic Agriculture Movements IFOAM, Bonn, Germany; **Thilak Kariyawasam**, Lanka Organic Agriculture Movement, Sri Lanka; **Iris Kazazi**, Albanian Association of Marketing, Tirana, Albania; **Andrey Khodus**, Eco-control Ltd., Solnechnogorsk, Germany; **Eustace Kiarii**, Kenya Organic Agricultural Network (KOAN), Nairobi, Kenya; **Lukas Kilcher**, Landwirtschaftliches Zentrum Ebenrain / Centre Agricole Ebenrain, Sissach, Switzerland; **Elizabeth Kirby**, Washington State University, Wenatchee WA 98801, United States; **Corinne Khoury**, IMCERT, Lebanon; **Evgeniy Klimov**, Organic Centre of Kazakhstan, Almaty, Kazakhstan; **Marja-Riitta Kottila**, Pro Luomu, Kauniainen, Finland; **Kai Kreuzer**, Organic-Market.Info, Lauterbach, Germany; **Paul Kristiansen**, University of New England, Armidale, NSW, Australia; **Heinz Kuhlmann**, ABC Enterprises, Tokio, Japan; **Manoj Kumar Menon**, International Competence Centre for Organic Agriculture ICCOA, Rajarajeshwarinagar, Bangalore, India; **Shaknoza Kurbanalieva**, HELVETAS Swiss Association for International Cooperation, Jalal-Abad, the Kyrgyz Republic; **Noel C. Kwai**, Tanzania Organic Agriculture Movement TOAM, Dar es Salaam, Tanzania; **Carla Larsson**, Statistics Sweden, Örebro, Sweden; **Sonia Lehmann**, Deutsche Gesellschaft für Internationale Zusammenarbeit GIZ Ecuador, Quito, Ecuador; **Ralph Liebing**, ORA ~ Organic Retailers Association, Wien, Austria; **Sann Linn**, Myanmar; **Ming Chao Liu**,

Organics Brazil, Brazil; **Michal Lošťák**, Czech University of Life Sciences Prague (CULS), Prague, Czech Republic; **Fabio Lunati**, Nomisma Spa, Bologna, Italy; **Samia Maamer Belkhiria**, Ministère de l'Agriculture, des Ressources Hydrauliques et de la Pêche, Tunis, Tunisia; **Anne Macey**, Canadian Organic Growers COG, Saltspring Island, BC, Canada; **Marcela Machuca Henao**, Ecocert, Bogota D.C, Colombia; **Hossein Mahmoudi**, Environmental Sciences Research Institute, Evin Shahid Beheshti University SBU, Velenjak, Evin, Tehran, Iran; **Betty Mandl**, Ministerio de Ganadería, Agricultura y Pesca (MGAP), Montevideo, Uruguay; **Jon Manhire**, The AgriBusiness Group, Christchurch, New Zealand; **Jose Fernando Maldonado Cestona**, El Salvador; **Karen Mapusua**, Secretariat of the Pacific Community (SPC), Suva, Fiji; **Roberto Guimarães Habib Mattar**, Ministério da Agricultura Pecuária e Abastecimento, Brasília DF, Brazil; **Robert Mayo**, Food and Agriculture Organization of the United Nations (FAO), Rome, Italy; **Cliflyn McKenzie**, Ecocert Southern Africa, Gardens, Cape Town, South Africa; **Stephen Meredith**, IFOAM EU Group, Brussels, Belgium; **Merit Mikk**, Centre of Ecological Engineering - Ökoloogiliste Tehnoloogiate Keskus, Tartu, Estonia; **Jelena Milic**, Ministry of Agriculture, Forestry and Water, Belgrade, Republic of Serbia; **Eugene Milovanov**, Organic Federation of Ukraine, Kiev, Ukraine; **Natasa Mirecki**, University of Montenegro, Biotechnical Faculty, Podgorica, Montenegro; **Alexandra Mitchell**, University of New England, Australia; **Andrew Monk**, Australian Organic Ltd, Australia; **Emilia Monney**, Ministry of Food and Agriculture, Accra, Ghana; **Bara Morgane**, Ecocert, L'Isle-Jourdain, France; **Mersida Musabegovic**, Organska Kontrola (OK), Sarajevo, Bosnia & Herzegovina; **Darija Musulin**, Ministry of Agriculture, Zagreb, Croatia; **Charity Namuwoza**, National Organic Agricultural Movement of Uganda NOGAMU, Kampala-Uganda; **Từ Thị Tuyết Nhung**, VNOS Organic Agriculture Consultant, Hanoi, Vietnam; **Urs Niggli**, Forschungsinstitut für biologischen Landbau (FiBL) / Research Institute of Organic Agriculture, Frick, Switzerland; **Aleksandra Nikolic**, University of Sarajevo, Sarajevo, Bosnia and Herzegovina; **Agung Nugroho**, Helvetas Laos, Vientiane Capital, Lao PDR; **Kung Wai Ong**, Organic Malaysia, Penang, Malaysia; **Pnina Oren Shnidor**, Ministry of Agriculture and Rural Development, Israel; **Kolbjörn Örjavik**, Grolink AB, Höje, Sweden; **Maximiliano Ortega**, Belize Organic Producers Association, Belmopan, Belize; **Susanne Padel**, Organic Research Centre, Hamstead Marshall, Newbury, UK; **Vitoon Panyakul**, Green Net, Bangkok, Thailand; **Gordana Pecelj**, PROBIO consulting agency for organic farming, Skopje Macedonia; **Ejvind Pedersen**, Landbrug & Fødevarer, Copenhagen, Denmark; **Elias Pfäffli**, bio.inspecta, Frick, Switzerland; **Joan Picazos**, Biocop Productos Biológicos, S.A. (BIOCOP), Lliçà de vall (Barcelona), Spain; **Diego Pinasco**, Servicio Nacional de Sanidad y Calidad Agroalimentaria SENASA, Buenos Aires, Argentina; **Roberto Pinton**, Pinton Organic Consulting, Padova, Italy; **Patrizia Pugliese**, Centro Internazionale di Alti Studi Agronomici Mediterranei - Istituto Agronomico Mediterraneo di Bari - CIHEAM-IAM Bari, Valenzano (BA), Italy; **Yuhui Qiao**, China Agricultural University, Beijing, China; **Juan Carlos Ramirez**, Servicio Nacional de Sanidad y Calidad Agroalimentaria SENASA, Buenos Aires, Argentina; **Basanta Rana Bhat**, Ecological Service Centre, Chitwan, Nepal; **Sandra Randrianarisoa**, Ecocert East Africa, Antananarivo, Madagascar; **Michel Reynaud**, Ecocert International, Office, Toulouse, France; **Miguel A. Rivera Ovando**, Ministry of Agriculture, MAG, El Salvador; **Nathalie Rison**

Alabert, Agence BIO, Montreuil-sous-Bois, France; **Armelle Rochat**, bio.inspecta, Frick, Switzerland; **Elisabeth Rohner-Thielen**, Eurostat - Statistical Office of the European Union, Luxemburg; **Marta Romeo**, Sistema d'Informazione nazionale sull'agricoltura biologica SINAB, Roma, Italy; **Armando José Gomez Romero**, MAGFOR, Nicaragua; **Elin Røsnes**, Norwegian Agricultural Authority SLF, Oslo, Norway; **Felix Ruhland**, Organic Farming Project, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, GIZ International Services, Riyadh, Saudi Arabia; **Mitul Saha**, Horticulture Export Development Foundation, Dhaka, Bangladesh; **Amarjit Sahota**, Organic Monitor Ltd., London UK; **Vincent Samborski**, Landbouw en Visserij, Brussels, Belgium; **Thatsaka Saphangthong**, Vientiane, Lao PDR; **Adrienn Sárközy**, Biokontroll Hungária, Budapest, Hungary; **Diana Schaack**, Agrarmarkt Informations-Gesellschaft mbH, Bonn, Germany; **Burkhard Schaer**, ECOZEPT, Montpellier, France; **Aender Schanck**, BIOGROS Logistique, Munsbach, Luxemburg; **Winfried Scheewe**, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, Sangkat Boeung Keng Kang III, Khan Chamkar Mon, Phnom Penh, Cambodia; **Bernhard Schlatter**, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland; **Otto Schmid**, Research Institute of Organic Agriculture FiBL, Frick, Switzerland; **Rita Schwentesius**, Universidad Autónoma Chapingo // Chapingo University, Chapingo, México; **Dennis Sciberras**, Ministry for Resources and Rural Affairs, Ghammieri, Malta; **Elene Shatberashvili**, Elkana - Biological Farming Association, Akhaltsikhe, Georgia; **Nina Shestakova**, ABCert GmbH, Esslingen, Germany; **Anamarija Slabe**, Institut za trajnostni razvoj, Lubljana, Slovenia; **Nicolette van der Smissen**, Consultant for Organic Production, Feres, UK; **Manjo Smith**, Namibian Organic Association NOA, Okahandja, Namibia; **Marianna Smith**, Ecocert South Africa, Cape Town, South Africa; **Francesco Solfanelli**, Università Politecnica Marche, Ancona, Italy; **Sokol Stafa**, Albinspekt, Tiranë, Shqipëri, Albania; **Erdal Süngü**, Ministry of Food Agriculture and Animal Husbandry, Ankara, Turkey; **Trine Thanh Ha**, Norwegian Agricultural Authority SLF, Oslo, Norway; **Emma Tsessue**, ECOCERT SAS, L'Isle Jordan; **Kesang Tshomo**, Ministry of Agriculture MOA, Thimphu Bhutan; **M. Nazim Uddin**, ANSOFT, Bangladesh; **Daniela Vairo**, Università Politecnica Marche, Ancona, Italy; **Paul Verbeke**, BioForum Vlaanderen vzw, Antwerpen, Belgium; **Fabienne Verzeletti**, LACON GmbH, Offenburg, Germany; **Vijayan PC**, INDOCERT, Kerala, India; **Hellmut von Koerber**, fleXinfo, Frick; **Maohua Wang**, Certification and Accreditation Administration of the People's Republic of China CNCA, Haidian district, Beijing, China; **Yu Watanabe**, IFOAM Japan, Tokio, Japan; **Els Wynen**, Eco Landuse Systems, Flynn, Australia; **Abdoul Aziz Yanogo**, Ecocert SA West Africa Office, Ougadougou 11, Burkina Faso; **Raffaele Zanoli**, Università Politecnica Marche, Ancona, Italy; **José Zapata**, Oficina de Control Agricultura Organica, Secretaria de Estado de Agricultura OCO, Santo Domingo, Republica Dominicana; **Zhejiang Zhou**, IFOAM Asia, China; **Darko Znaor**, Independent Consultant, Zagreb, Croatia; **Silvia Zucconi**, Nomisma - Economic Research Institute, Bologna, Italy

Organic Agriculture 2014: Key Indicators and Leading Countries

Indicator	World	Leading countries
Countries with data on certified organic agriculture[1]	2012: 164 countries	
Organic agricultural land	2012: 37.5 million hectares (1999: 11 million hectares)	Australia (12 mio. hectares, 2009) Argentina (3.6 mio. hectares) US (2.2 mio. hectares, 2011)
Share of total agricultural land	2012: 0.87 %[2]	Falkland Islands (Malvinas) (36.3 %) Liechtenstein (29.6 %) Austria (19.7 %)
Further, non-agricultural organic areas (mainly wild collection)	2012: 31 million hectares (2011: 32.5 million hectares; 2010: 43 million hectares)	Finland (7 million hectares) Zambia (6.1 million hectares; 2009) India (4.7 million hectares)
Producers	2012: 1.9 million producers (2011: 1.8 million producers; 2010: 1.6 million producers)	India (600'000), Uganda (189'610), Mexico (169'707)
Organic market size	2012: 63.8 billion US dollars (approx. 50 billion euros) (1999: 15.2 billion US dollars) Source: Organic Monitor	US (22.6 billion euros), Germany (7 billion euros) France (4 billion euros)
Per capita consumption	2012: 9.08 US dollars[3]	Switzerland (189.1 euros), Denmark (158.6 euros) Luxemburg (143 euros)
Number of countries with organic regulations 2012	2012: 88 countries (2011: 86 countries)	
Number of IFOAM affiliates	2013: 732 affiliates from 114 countries	Germany: 85 affiliates; India: 44 affiliates; United States: 37 affiliates; China: 34 affiliates

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

[1] Where the designation "country" appears in this book, it covers countries or territories.
[2] Share of the countries included in the FiBL-IFOAM survey 2014.
[3] Total world population 7.05 billion in 2012 according to FAOSTAT, FAO, Rome; http://faostat.fao.org/site/550/DesktopDefault.aspx?PageID=550#ancor.

The World of Organic Agriculture 2014: Summary

HELGA WILLER[1] AND JULIA LERNOUD[2]

Key data on organic agriculture

According to the latest FiBL-IFOAM survey on certified organic agriculture worldwide, as of the end of 2012, data on organic agriculture are available from **164 countries** (up from 162 in 2011).

There were **37.5 million hectares of organic agricultural land in 2012**, including in-conversion areas. The regions with the largest areas of organic agricultural land are Oceania (12.2 million hectares, 32 percent of the world's organic agricultural land) and Europe (11.2 million hectares, 30 percent). Latin America has 6.8 million hectares (18 percent) followed by Asia (3.2 million hectares, 9 percent), North America (3 million hectares, 8 percent) and Africa (1.1 million hectares, 3 percent). For the detailed results of the FiBL-IFOAM survey, see page 34. The countries with the most organic agricultural land are Australia (12 million hectares), Argentina (3.6 million hectares), and the United States (2.2 million hectares).

Currently 0.9 percent of the agricultural land of the countries covered by the survey is organic. By region, the highest shares of the total agricultural land are in Oceania (2.9 percent) and in Europe (2.3 percent). In the European Union, 5.6 percent of the farmland is organic. However, some countries reach far higher shares: Falkland Islands, 36.3 percent; Liechtenstein, 29.6 percent; Austria, 19.7 percent. **In ten countries, more than ten percent of the agricultural land is organic.**

In 2012, the organic agricultural land increased by almost 0.2 million hectares or 0.5 percent. There has been an increase of the organic agricultural land in Africa and Europe; in Europe the area grew by 0.6 million hectares (6 percent). In Asia, there was a major drop in organic land in 2012; 0.47 million hectares less were reported. In Latin America, the organic land decreased, mainly due to a decrease of organic grazing areas in Argentina.

Apart from agricultural land, there are further organic areas, most of these being areas for wild collection. Other areas include aquaculture, forests, and grazing areas on non-agricultural land. **The areas of non-agricultural land constitute more than 31 million hectares. In total, 69 million hectares (agricultural and non-agricultural areas) are organic.**

There were more than 1.9 million producers in 2012. Thirty-six percent of the world's organic producers are in Asia, followed by Africa (30 percent) and Europe (17 percent). The countries with the most producers are India (600'000), Uganda (189'610), and Mexico (169'707).

About one third of the world's agricultural land (10.8 million hectares) and more than 80 percent (1.6 million) of the producers are in developing countries and emerging markets.

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

Land use details were available for almost 90 percent of the organic agricultural land. Unfortunately, some countries with very large organic areas, such as Australia, Brazil, and India had little or no information on their land use. Almost two-thirds of the agricultural land was grassland/grazing areas (22.5 million hectares). With a total of at least 7.5 million hectares, arable land constitutes almost 20 percent of the organic agricultural land. An increase of three percent over 2011 was reported. Most of this category of land is used for cereals, including rice (3.1 million hectares), followed by green fodder from arable land (2.3 million hectares), oilseeds (0.6 million hectares), protein crops (0.3 million hectares), and vegetables (0.2 million hectares).

Permanent crops account for approximately seven percent of the organic agricultural land, amounting to 3.2 million hectares. Compared with the revised data of the previous survey, the permanent cropland showed an increase of 10 percent, after remaining steady the previous three years. The most important permanent crops are coffee (with almost 0.7 million hectares, constituting almost one quarter of the organic permanent cropland), followed by olives (0.6 million hectares), nuts and grapes (0.3 million hectares each), and cocoa (0.21 million hectares).

Most of the wild collection area (including areas for beekeeping) is in Europe (35 percent of the global total) and Africa (32 percent). Not much detail is available on the crops harvested. Berries, medicinal and aromatic plants, and fruit are among the most important crops.

Global market

Healthy growth is continuing in the global market for organic products. Latest research from Organic Monitor finds international sales of organic food and drink approached 64 billion US dollars in 2012.[1] Growth is occurring in all regions; however, demand for organic products is mainly in North America and Europe. Organic product sales are projected to continue to rise in the coming years. (See chapter by Amarjit Sahota, page 127).

In 2012, the countries with the largest organic markets were the United States, Germany, and France. According to FiBL and IFOAM, the largest single market was the United States (approximately 44 percent of the global market), followed by the European Union (approximately 41 percent). The highest per-capita consumption was in Switzerland, Denmark, and Luxembourg. The highest market shares were reached in Denmark, Switzerland and Austria. (See chapter on the global survey on organic agriculture, section on global market, page 34).

Africa

There are slightly more than one million hectares of certified organic agricultural land in Africa. This constitutes about three percent of the world's organic agricultural land. There were more than 557'000 producers. Uganda is the country with the largest organic area (with more than 231'000 hectares) and with the largest number of organic producers. The country with the highest share of organic agricultural land is the island state Sao Tome and Principe, with 7 percent of its agricultural area being organic. The majority of certified organic produce in Africa is destined for export markets. Key crops

[1] Global market size appears only marginally higher than 2011 because of fluctuations in exchange rate (EUR: USD) and revision of North American market data.

are coffee, olives, cocoa, oilseeds, and cotton. The development of organic agriculture in Africa is entering a new phase. There is a growing recognition among policy makers that organic agriculture has a significant role to play in addressing food insecurity, land degradation, poverty, and climate change in Africa. Significant breakthroughs were achieved in 2013 in the institutionalization of the African Organic Network (AfrONet), the umbrella organization established during the Second African Organic Conference held in Zambia in 2012. The third East African conference, entitled "Sharing Achievements Made and Lessons Learned", was held in Dar es Salaam, Tanzania, in July 2013. About 200 participants from 20 countries attended the conference. Given that East Africa is leading the continent in organic agriculture, the conference provided a huge opportunity for stakeholders from other African countries and sub-regional sectors to learn from the East African experience. Within a timeframe of 3.5 years, the recently-started ProEcoOrganicAfrica project will work towards improving rural livelihoods in Ghana and Kenya, including food supply, nutrition and income security through climate-smart ecological intensification of agricultural systems. (See article by Hervé Bouagnimbeck, page 151).

Asia

The total organic agricultural area in Asia was 3.2 million hectares in 2012. This constitutes nine percent of the world's organic agricultural land. There were nearly 0.7 million producers; most of these were in India. The leading countries by area were China (1.9 million hectares) and India (0.5 million hectares); Timor-Leste has the highest proportion of organic agricultural land (almost seven percent). Although, in many countries, the organic area grew (compared with 2011), the organic agricultural land in Asia decreased by almost 0.5 million hectares, mainly due to a major decrease in India. The Asian market for organic products is growing; however, data on the domestic market are available for only a few countries. The continent is divided in terms of consumption and production. Most organic domestic product sales are from the affluent countries; other Asian countries mainly have export-geared organic food sectors. (For details, see chapter on current statistics in Asia page 183).

The Standard for Organic Agriculture (ASOA) of the Association of Southeast Asian Nations (ASEAN), which is likely to become a very influential development for the region in the future, is expected to be approved by the ASEAN Ministers on Agriculture and Forestry in June 2014. Despite the more stringent organic rules promulgated in China in 2012, operator numbers have not diminished. At the private sector level, IFOAM Asia (under South Korean sponsorship) held its inaugural revival assembly in June 2013 in South Korea and elected a board. For details, see chapter on organic farming in Asia by Ong Kung Wai, page 165. A detailed country report about organic farming in Bangladesh by Mitul Kumar Saha and S. M. Monowar Hossain (page 170), and a report about organic tea production in China from Yuhui Qiao (page 177) are available in this edition. Developments in the United Arab Emirates are covered in an article by Saif Mohamed AlShara (page 180).

Europe

As of the end of 2012, 11.2 million hectares of agricultural land in Europe were managed organically by more than 320'000 farms. In Europe, 2.3 percent of the agricultural area is organic (European Union: 5.6 percent). Thirty percent of the world's organic land

is in Europe. Compared to 2011, organic farmland increased by more than 0.6 million hectares. The countries with the largest organic agricultural area are Spain (1.6 million hectares), Italy (1.2 million hectares), and Germany (1 million hectares). Seven countries have more than ten percent organic agricultural land: Liechtenstein has the lead (29.6 percent), followed by Austria (19.7 percent), and Sweden (15.6 percent). Sales of organic products totalled approximately 22.8 billion euros in 2012 (European Union: 20.9 billion euros), an increase of six percent over 2011. The largest market for organic products in 2012 was Germany, with retails sales of more than 7 billion euros, followed by France (4 billion euros) and the UK (1.95 billion euros) (see article by Diana Schaack et al., page 215). The research project OrganicDataNetwork is expected to be a major step towards improving European market data; the project's statement on data collection, provided in light of the current revision of the EU policy and legal framework, gives input on how data collection and data availability in Europe can be improved in the future (page 200). The European Technology Platform for Organic Food and Farming Research (TP Organics) joins the efforts of industry and civil society in defining organic research priorities and defending them vis-à-vis policy-makers. In July 2013, TP Organics was granted official "technology platform" status by the European Commission; these platforms play a considerable role in setting priorities for Horizon 2020, the next EU framework programme for research (running from 2014 to 2020). For more information, see chapter by Helga Willer on organic farming in Europe (page 193).

A country report about the new EU member state Croatia is included in the European chapter on page 217. This report is one of the more than thirty country reports published by the European Union Group of the International Federation of Organic Agriculture Movements (IFOAM EU) in the book "Organic in Europe: Prospects and Developments".[1]

Latin America

In Latin America, slightly more than 300'000 producers managed 6.8 million hectares of agricultural land organically in 2012. This constitutes 18 percent of the world's organic land and 1.1 percent of the region's agricultural land. The leading countries are Argentina (3.6 million hectares), Uruguay (0.9 million hectares, 2006) and Brazil (0.7 million hectares). The highest shares of organic agricultural land are in the Falkland Islands/Malvinas (35.3 percent), French Guiana (10.6 percent), and the Dominican Republic (8.9 percent). Notable growth occurred in Mexico, where the organic area increased by more than 100'000 hectares.

It has been ten years since Costa Rica attained "third-country" status with the European Union (2003); the first country that was granted this status was Argentina, in 1992. A new scenario, with equivalence agreements among the US, Canada, and EU, is bringing new possibilities for the facilitation of organic product trade in the region. Domestic organic markets are being developed in every country, and the most popular farmers' fairs are being consolidated in many places. Major efforts are being made in giving added value to products from this region. This is an important approach for the development of organic farming, especially in rural areas where raw materials are produced. For details, see article on Latin America with country reports by Patricia Flores on page 221.

[1] Meredith, Stephen and Helga Willer (Eds) (2014): Organic in Europe. Prospects and Developments. IFOAM EU Group, Brussels

North America

In North America, more than 3 million hectares of farmland were managed organically in 2012. Of these, 2.2 million were in the United States (2011 data) and 0.8 million in Canada, representing approximately 0.7 percent of the total agricultural area in the region and 8 percent of the world's organic agricultural land.

The overall U.S. organic market continued to climb in 2012, reaching 31.5 billion US dollars and experiencing double-digit growth of 10.3 percent, according to OTA's 2013 Organic Industry Survey. Organic food sales rose 10.2 percent to reach 29.023 billion US dollars. This compares to conventional food sales growth of 3.7 percent. Organic food's share has grown to 4.3 percent of total food sales, while organic non-food sales account for 0.6 percent of total comparable non-food sales. The U.S. organic industry once again experienced a major milestone in 2013 with the signing of an organic equivalence arrangement—this time with Japan. It marks the first U.S. organic arrangement in Asia and the first ever without organic standards exceptions. Another highlight during 2013 was the official recognition by the U.S. Secretary of Agriculture Tom Vilsack of the distinct needs of the organic sector.

In Canada, the total area in certified production (including both annual and perennial crops), forages and pasture, is estimated at more than 830'000 hectares. In addition to the agricultural land, there is a considerable area of maple forest in Quebec, Ontario and New Brunswick, as well as areas used for the collection of wild blueberries. In 2013, the Canada Organic Trade Association (COTA) released the first comprehensive study of the Canadian organic market and consumer, based on 2012 data. COTA's new study has found that the value of the Canadian organic food market, at 3 billion Canadian dollars, is also a major source of organic products to the world, with exports worth approximately 458 million Canadian dollars. It has now been confirmed that the Canadian Organic Standards will be reviewed and amended over the next two years. It is expected that the newly revised Canadian Organic Standard will be published in August 2015.

For more details on recent developments, see articles by Barbara Haumann on the United States (page 241) and by Matthew Holmes and Anne Macey on Canada (page 247) in the North American section of this book.

Oceania

This region includes Australia, New Zealand, and the Pacific Island states including Fiji, Papua New Guinea, Tonga, and Vanuatu, among others. Altogether, there were more than 14'600 producers, managing 12.2 million hectares. This constitutes 2.9 percent of the agricultural land in the region and 32 percent of the world's organic land. More than 98 percent of the organic land in the region is in Australia (12 million hectares in 2009, 97 percent of which is extensive grazing land), followed by New Zealand (106'000 hectares), and Samoa (33'500 hectares). The highest shares of all agricultural land are in Samoa (11.8 percent), followed by French Polynesia (5.5 percent), Australia (2.9 percent, 2009) and Vanuatu (2.2 percent). Growth in the organic industry in Australia, New Zealand, and the Pacific Islands has been strongly influenced by rapidly growing overseas demand; domestic sales are, however, also growing. In Australia, the domestic

market was valued at 1.2 billion Australian dollars in 2012[1] and in New Zealand at 130 million New Zealand dollars (2012).[2]

In Australia, there have been no significant changes to the administration of domestic standards and certification procedures. In 2013, seven certification agencies continue to be accredited by the Department of Agriculture, Fisheries and Forestry (DAFF). Independent market analysis notes that organic farming has been one of the economy's best performing industries over the past five years. In 2012, around half of the returns from organic holdings were derived from livestock. Despite very limited government support for organic farming, Organic Trust Australia - Research and Education continues to develop opportunities for the co-funding of research projects through sponsorships, donations, and support for grant applications. See the chapter on organic farming in Australia from Alex Mitchell and Paul Kristiansen on page 257.

In the Pacific Islands, most of the organically certified products are produced for export. The main international markets for the exported organic products are Australia and New Zealand, due to their proximity. Other markets include North America, the European Union, and Japan. Generally, the domestic markets for certified organic products are not very developed, and in some cases, are non-existent. With a boost in resources for the Pacific Organic and Ethical Trade Community to implement activities and move towards the goals articulated in the Strategic Plan 2013–2017, momentum for growth in the organic sector has increased through 2013. Moreover, with the implementation of the Pacific Organic Guarantee System, growth will continue through 2014. The decision by the Heads of Agriculture and Forestry Services and the Ministers of Agriculture and Forestry to mainstream organics into agriculture strategy development and planning also provides a solid base for the continued expansion of the organic sector in the Pacific Islands. (See the chapter by Karen Mapusua on page 261).

Standards and regulations

According to the FiBL survey on organic rules and regulations, the number of countries with organic standards has increased to 88. Twelve countries are in the process of drafting legislation. One of the breakthroughs in 2013 was the adoption of an organic law in Ukraine. In Russia, the discussion on an organic legislation has been revived but has not yet been finalized. The European Union (EU) underwent an intensive review process of their regulations; the elements of the review process included an impact assessment, a public online consultation, expert hearings, and an evaluation of the regulation by experts. (See contribution by Huber and Schmid on page 135).

IFOAM's Family of Standards is a primary framework for guaranteeing that an organic standard adequately describes globally-recognized expectations for what organic producers should do and what their products should represent. With over 50 approved standards, the number of which is growing, the Family of Standards is the model for multilateral recognition and equivalence agreements. Another challenge is keeping data forms certified in centralized systems, and IFOAM is working with partners in the organic movement on the design and implementation of these systems. Moreover,

[1] 1 euro = 1.2407 Australian dollars(average exchange rate 2012); Source: European Central Bank at http://sdw.ecb.europa.eu/browse.do?node=2018794

[2] 1 euro = 1.5867 New Zealand dollar s (average exchange rate 2012); Source: European Central Bank at http://sdw.ecb.europa.eu/browse.do?node=2018794

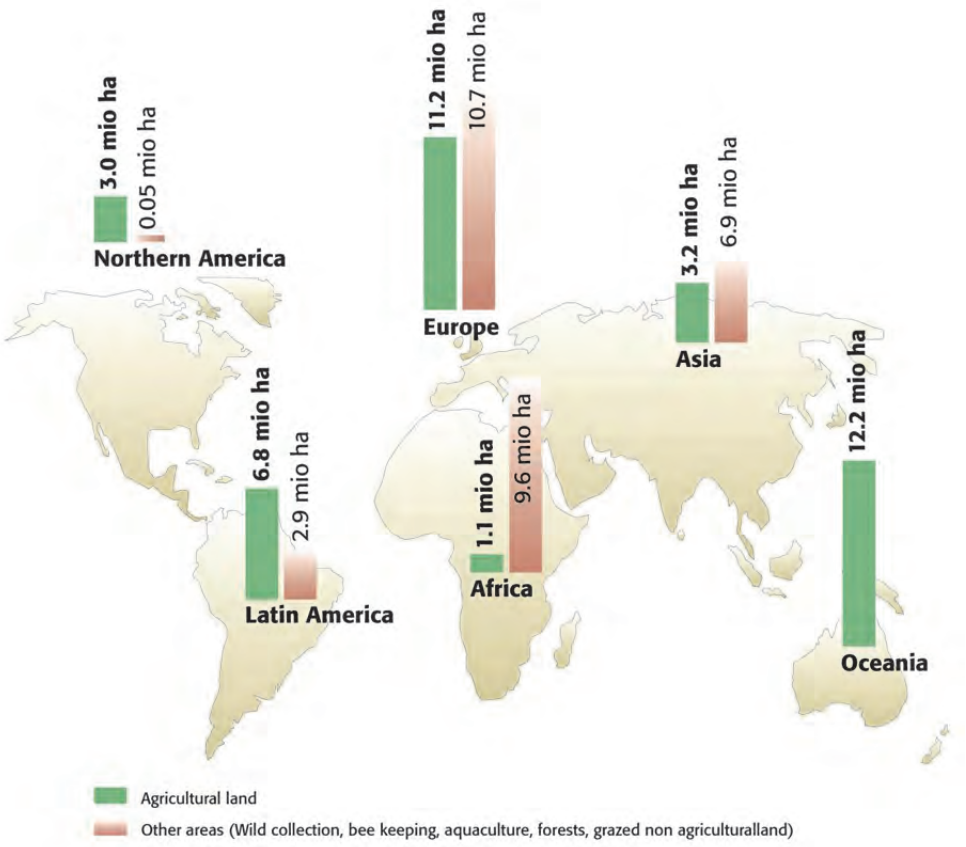
IFOAM is working to facilitate the interoperability of these systems to provide a comprehensive, global coverage for the real-time validation of certified organic products. A third area of work is the Sustainable Organic Agriculture Action Network (SOAAN) that developed the Best Practice Guideline for Agriculture and Value Chains. This foundational document shows how organic practices are not the "top" but are rather the "base" or "core" onto which a broader implementation of sustainable practices needs to occur. Using the Best Practice Guideline as a basis, IFOAM is now engaging leading organic standards schemes in a Best Practice Community, where standards owners, leading companies, and sustainability evaluation tools can showcase and share their learnings and achievements for common benefit. These leading standards will also be part of the IFOAM Family of Standards, further increasing the amount of organic actors considered in this basic frame of credibility. (For more information see the article by David Gould on page 143).

Participatory Guarantee Systems (PGS) are locally-focused quality assurance systems. They certify producers based on the active participation of stakeholders and are built on a foundation of trust, social networks, and knowledge exchange. Latin America and the Caribbean region has the highest number of PGS initiatives that are currently operational. It is estimated that over 49'000 small operators are currently involved in PGS worldwide. The majority of these are small farmers, with a few small processors. The leading countries in terms of producers involved in PGS are: the Philippines (10'620), Uganda (6'498), Tanzania (6'185), India (5'977), and Bolivia (4'058). Brazil and South Africa also play an important role, with over 3'300 producers involved in PGS in each country. It is estimated that PGS-certified producers are currently managing a total of 52'664 ha of agricultural land. (See article by Flávia Castro, page 146).

It is time for organic 3.0

Organic production and consumption have grown continuously over the past decades, yet statistics show that organic market shares are still small. The fulfilment of the organic ambition of making a relevant contribution to global environmental and social challenges and changing the present paradigm of the industrialization of agriculture requires a new strategy: Organic 3.0, writes IFOAM director Markus Arbenz (page 275). The International Federation of Organic Agriculture Movements (IFOAM), together with BIOFACH and the German Organic Movement, has identified three key issues that should be addressed first in developing Organic 3.0: Resources, impact, and transparency. IFOAM also suggests using the UN International Year of Family Farming as a framework for discussions on the further development of Organic 3.0. The leading event is BIOFACH Nuremberg, which will launch the Organic 3.0 discussion. The 18th IFOAM Organic World Congress (OWC) and the IFOAM General Assembly on October 2014 in Istanbul, Turkey are great opportunities to bring these new ideas together and highlight the results reached in decentralized discussions.

Organic Agriculture Worldwide: Current Statistics



Map 1: Organic agricultural land and other organic areas in 2012
Source: FiBL-IFOAM survey 2014

Current Statistics on Organic Agriculture Worldwide: Organic Area, Producers and Market

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

The 15th survey of certified organic agriculture worldwide was carried out by the Research Institute of Organic Agriculture (FiBL) in collaboration with the International Federation of Organic Agriculture Movements (IFOAM).

This survey, as with past surveys, was funded by the Swiss State Secretariat for Economic Affairs (SECO) and NürnbergMesse.[4]

Data were provided by more than 200 experts. Furthermore, data from the Mediterranean countries were collected in cooperation with the Mediterranean Organic Agriculture Network (MOAN, c/o Mediterranean Agronomic Institute of Bari); in the Central American countries with the Regional Unit for Technical Assistance for Sustainable Rural Development (RUTA), and for the Pacific Islands in cooperation with the Pacific Organic and Ethical Trade Community (POET.com). For Europe, some data collected in the framework of the OrganicDataNetwork project were used (www.organicdatanetwork.net).

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

Scope

In total, data were available from 164 countries (most data are per end of 2012). Angola, Bermuda, and San Marino appear new on the list of countries with organic data, but for Andorra and Suriname, for which data had previously been available, data were no longer provided.

Updated data on the organic area were available for 129 countries; however, for some countries, updates were only available for the total organic area, and not necessarily for the number of farms, land use or other indicators. In such cases, data from the previous survey were used.

[1] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[2] Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[3] Bernhard Schlatter, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[4] From 2008 to 2011, the data collection activities were supported under a project of the International Trade Centre ITC and the Swiss State Secretariat of Economic Affairs SECO. Under this project, the following activities were funded: Build a data collection tool; redesign of the www.organic-world.net website, provide the statistical material and graphs as well as background information; data collection and processing; overview of data availability world-wide; dissemination activities.

Table 1: Countries and territories covered by the global survey on organic agriculture 2012

	Countries* with data on organic agriculture	Countries per region[1]	Share of countries that provided data (%)
Africa	38	57	67
Asia	37	49	76
Europe	46	46	100
Latin America and Caribbean	28	45	62
North America	3	5	60
Oceania	11	23	49
World	164	224	73

Source: FiBL-IFOAM survey 2014
*Where the designation "country" appears in this book, it covers countries or territories.

Indicators

Data on the following indicators were collected:

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

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

More information on www.organic-world.net

Tables with more details on crops, country details, and conversion status can be downloaded as excel files from the Organic-World website (www.organic-world.net).

Contact

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

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

General notes on the data

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

PGS: As in 2011, for some countries, such as Namibia, areas certified by Participatory Guarantee Systems (PGS) are included. (For more information about PGS see the article by Flávia Castro on page 146).

Countries: For countries and areas, the Standard Country and Area Codes Classifications; as defined by the United Nations Statistics division, are used.[2] Where the designation "country" appears in this volume, it covers countries or territories.

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

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

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

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

Producers: Some countries report the number of smallholders while others report only the number of companies, projects or grower groups, which may each comprise a number of producers. This applies in particular to many African countries.

Data revisions: Data revisions and corrections, compared with the data published in this edition of *The World of Organic Agriculture* are communicated at http://www.organic-world.net/statistics-data-revisions.html as well as www.organic-world.net/statistics-data-tables.html.

Contact

Helga Willer, FiBL, Frick, Switzerland, e-mail helga.willer@fibl.org

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

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

Organic agricultural land

Currently 37.5 million hectares are under organic agricultural management worldwide (end of 2012 for most data).[1]

The region with the most organic agricultural land is Oceania, with 12.2 million hectares, followed by Europe with 11.2 million hectares, Latin America (6.8 million hectares), Asia (3.2 million hectares), North America (3 million hectares), and Africa (1.1 million hectares).

Oceania has one-third of the global organic agricultural land, but its relative importance is decreasing. Europe; a region that has had a very constant growth of organic land over the years, has almost 30 percent of the world's organic agricultural land, followed by Latin America with 18 percent (see Table 2, Figure 1).

Australia is the country with the most organic agricultural land; 97 percent of the farmland is extensive grazing area. Argentina is second, followed by the United States in third place (Table 3, Figure 2). The ten countries with the largest organic agricultural areas have a combined total of 26.3 million hectares and constitute seventy percent of the world's organic agricultural land.

Apart from the organic agricultural land, there are further organic areas, such as wild collection areas. These areas constitute more than 31 million hectares.

Table 2: World: Organic agricultural land (including in-conversion areas) and regional shares of the global organic agricultural land 2012

Region	Organic agricultural land (hectares)	Regions' share of the global organic agricultural land
Africa	1'145'827	3.05%
Asia	3'217'867	8.57%
Europe	11'171'413	29.75%
Latin America	6'836'498	18.21%
Northern America	3'012'354	8.02%
Oceania	12'164'316	32.40%
Total*	**37'544'909**	**100.00%**

Source: FiBL-IFOAM survey 2014. Note: Agricultural land includes in-conversion areas and excludes wild collection, aquaculture, forest, and non-agricultural grazing areas.
*** Includes correction value for French overseas departments.**

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

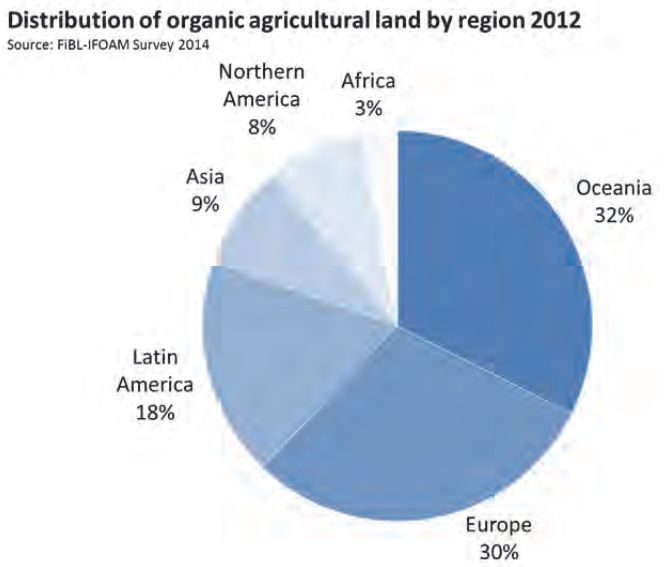


Figure 1: World: Distribution of organic agricultural land by region 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

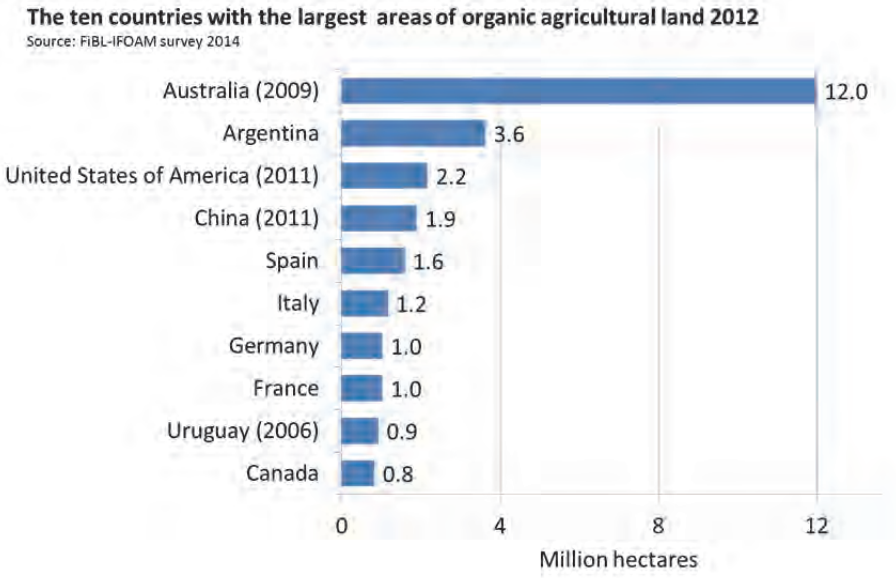


Figure 2: World: The ten countries with the largest areas of organic agricultural land 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286

Table 3: World: Organic agricultural land (including in-conversion areas) by country 2012 (sorted)

For an alphabetical country list (including information on data year), see page 281.

Country	Hectares
Australia	12'001'724
Argentina	3'637'466
United States of America	2'178'471
China	1'900'000
Spain	1'593'197
Italy	1'167'362
Germany	1'034'355
France	1'032'941
Uruguay	930'965
Canada	833'883
Brazil	705'233
Poland	661'956
United Kingdom	590'009
Austria	533'230
Turkey	523'627
India	500'000
Czech Republic	488'658
Mexico	487'393
Sweden	477'685
Greece	462'618
Falkland Islands (Malvinas)	403'212
Kazakhstan	291'203
Romania	288'261
Ukraine	272'850
Uganda	231'157
Portugal	200'151
Peru	197'837
Finland	197'751
Latvia	195'658
Denmark	194'706
United Republic of Tanzania	186'537
Dominican Republic	168'978
Slovakia	166'700
Ethiopia	164'777
Lithuania	156'539
Russian Federation	146'251
Estonia	144'147
Tunisia	137'188
Hungary	130'609
Switzerland	125'961
New Zealand	106'753
Indonesia	88'247

Country	Hectares
Egypt	82'167
Philippines	80'974
Belgium	59'718
Ecuador	56'303
Norway	55'260
Sudan	54'845
Ireland	54'122
Democratic Republic of the Congo	51'838
Paraguay	51'190
Netherlands	48'038
South Africa	43'170
Iran (Islamic Republic of)	42'634
Bulgaria	39'137
Viet Nam	36'285
Slovenia	35'101
Colombia	34'060
Nicaragua	33'621
Samoa	33'515
Bolivia	32'710
Thailand	32'577
Croatia	31'903
Madagascar	30'265
Ghana	28'161
Republic of Korea	25'467
Honduras	24'950
Timor-Leste	24'690
Azerbaijan	23'740
Chile	22'636
Pakistan	22'397
Moldova	22'102
Syrian Arab Republic	19'987
Sri Lanka	19'517
Côte d'Ivoire	19'457
Morocco	16'600
Burkina Faso	15'000
Mali	14'927
Namibia	14'123
Saudi Arabia	13'569
Guatemala	13'380
Macedonia (FYROM)	12'731
Tajikistan	12'659
Papua New Guinea	11'798

Statistics: Organic Agricultural Land

Country	Hectares
Japan	10'611
Nepal	10'273
Nigeria	9'521
Costa Rica	9'360
Cambodia	9'055
Iceland	8'240
Zambia	7'310
Bangladesh	6'860
Senegal	6'736
El Salvador	6'736
Occupied Palestinian Territory	6'354
Serbia	6'340
Israel	6'187
Bhutan	6'156
Lao People's Democratic Republic	5'990
Cuba	5'280
Taiwan	5'016
Kenya	4'894
Panama	4'576
Guyana	4'249
Vanuatu	4'106
Sao Tome and Principe	4'051
Luxembourg	3'924
Cyprus	3'923
United Arab Emirates	3'905
Togo	3'889
Mozambique	3'840
Rwanda	3'705
Lebanon	3'303
Montenegro	3'068
Jordan	2'895
Kyrgyzstan	2'696
Comoros	2'642
Benin	2'628
Angola	2'486
French Polynesia	2'469
French Guiana (France)	2'407
Fiji	2'164
Georgia	1'999
Belize	1'860
Solomon Islands	1'307
Liechtenstein	1'086
Myanmar	897

Country	Hectares
Armenia	810
Haiti	806
Algeria	700
Cameroon	663
Zimbabwe	626
Lesotho	617
Malaysia	603
Réunion (France)	594
Burundi	550
Jamaica	542
Albania	515
Tonga	398
Bosnia and Herzegovina	343
Faroe Islands	253
Channel Islands	250
Dominica	240
Uzbekistan	213
Martinique (France)	200
Guadeloupe (France)	164
Kosovo	111
Niger	106
Grenada	85
Niue	61
Afghanistan	61
Venezuela	59
Oman	38
Malawi	35
Malta	26
Cook Islands	20
Mauritius	16
Swaziland	8
Belarus (Wild collection only)	
Bermudas (Processing)	
Chad (Wild collection only)	
Guinea-Bissau (Wild collection only)	
San Marino (Processing)	
Singapore (Processing)	
Total*	**37'544'909**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.
* Total includes correction value for French overseas departments

.

Shares of organic agricultural land by region and country

The proportion of the world's agricultural land that is organic is 0.86 percent (for the countries included in the survey).

By region, the proportion is highest in Oceania (2.9 percent), followed by Europe with 2.3 percent and Latin America with 1.1 percent. In the 27 countries of the European Union, the proportion of organic agricultural land is 5.6 percent. In the other regions, the share is less than one percent (see Table 4).

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

However, 61 percent of the countries, for which data were available, have less than one percent organic agricultural land (Figure 4).

Table 4: World: Organic agricultural land (including in-conversion areas) and shares of total agricultural land 2012

Continent	Organic agr. land [ha]	Share of total agr. land*
Africa	1'145'827	0.1%
Asia	3'217'867	0.2%
Europe	11'171'413	2.3%
Latin America	6'836'498	1.1%
Northern America	3'012'354	0.7%
Oceania	12'164'316	2.9%
Total**	37'544'909	0.9%

Source: FiBL-IFOAM survey 2014.
*For the calculation of the shares of total agricultural land, only the countries that are included in the survey were used.
** Total includes correction value for French overseas departments.

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

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

[1] FAOSTAT, Data Archives, the FAO Homepage, FAO, Rome at faostat.fao.org > Resources > Resourcestat at http://faostat.fao.org/site/377/default.aspx#ancor
[2] Eurostat: Basic data – key agricultural statistics at http://ec.europa.eu/agriculture/agrista/2007/table_en/2012.pdf, The Eurostat Homepage, Eurostat, Luxembourg

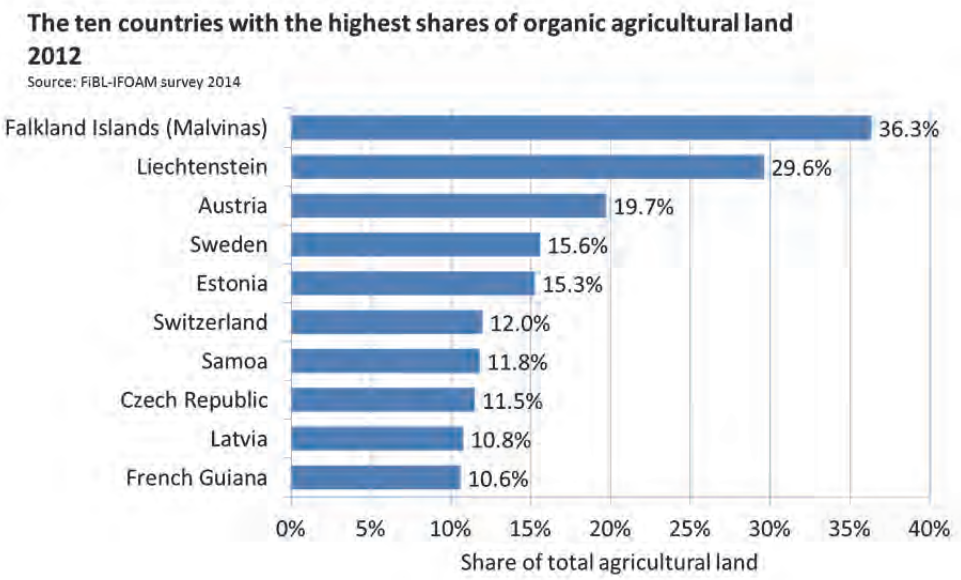


Figure 3: World: The ten countries with the highest shares of organic agricultural land 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

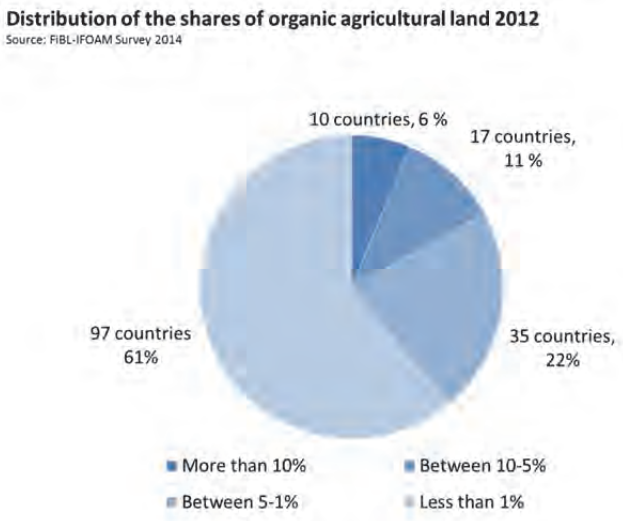


Figure 4: World: Distribution of the shares of organic agricultural land 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Table 5: World: Shares of organic agricultural land by country 2012, sorted

For an alphabetical country list (including information on data year), see page 281

Country	Share
Falkland Islands (Malvinas)	36.34%
Liechtenstein	29.60%
Austria	19.70%
Sweden	15.58%
Estonia	15.25%
Switzerland	11.98%
Samoa	11.80%
Czech Republic	11.50%
Latvia	10.77%
French Guiana (France)	10.60%
Italy	9.12%
Slovakia	8.79%
Dominican Republic	8.68%
Finland	8.65%
Faroe Islands	8.43%
Slovenia	7.60%
Denmark	7.36%
Sao Tome and Principe	7.23%
Timor-Leste	6.58%
Spain	6.40%
Uruguay	6.29%
Germany	6.19%
Portugal	5.97%
Greece	5.59%
French Polynesia	5.55%
Lithuania	5.40%
Norway	5.10%
Belgium	4.36%
Poland	4.28%
France	3.76%
United Kingdom	3.43%
Hungary	3.09%
Luxembourg	3.00%
Australia	2.93%
Channel Islands	2.84%
Cyprus	2.69%
Argentina	2.59%
Netherlands	2.49%
Croatia	2.41%
Mexico	2.27%
Egypt	2.23%
Vanuatu	2.20%
Turkey	2.16%
Romania	2.10%
Occupied Palestinian Territory	1.73%

Country	Share
Comoros	1.70%
Uganda	1.66%
Solomon Islands	1.56%
Réunion (France)	1.49%
Republic of Korea	1.37%
Tunisia	1.36%
Ireland	1.31%
Tonga	1.28%
Bulgaria	1.28%
Canada	1.23%
Niue	1.23%
Belize	1.22%
Bhutan	1.21%
Macedonia (FYROM)	1.19%
Israel	1.18%
Papua New Guinea	1.03%
Dominica	0.98%
New Zealand	0.93%
Peru	0.92%
Moldova	0.89%
Honduras	0.78%
Ecuador	0.75%
Sri Lanka	0.75%
Martinique (France)	0.71%
United Arab Emirates	0.69%
Grenada	0.68%
Philippines	0.68%
Cook Islands	0.67%
Ukraine	0.66%
Nicaragua	0.65%
United States of America	0.64%
Montenegro	0.60%
Taiwan	0.59%
United Republic of Tanzania	0.53%
Costa Rica	0.52%
Fiji	0.52%
Azerbaijan	0.50%
Lebanon	0.48%
Ethiopia	0.46%
El Salvador	0.44%
Guadeloupe (France)	0.39%
China	0.36%
Iceland	0.36%
Viet Nam	0.35%
Guatemala	0.30%

Statistics: Share of Organic Agricultural Land

Country	Share
Jordan	0.28%
India	0.28%
Japan	0.27%
Brazil	0.27%
Tajikistan	0.27%
Lao People's Democratic Republic	0.26%
Guyana	0.25%
Malta	0.25%
Paraguay	0.24%
Democratic Republic of the Congo	0.23%
Panama	0.21%
Rwanda	0.19%
Ghana	0.18%
Thailand	0.16%
Indonesia	0.16%
Cambodia	0.16%
Chile	0.14%
Syrian Arab Republic	0.14%
Kazakhstan	0.14%
Burkina Faso	0.13%
Serbia	0.13%
Jamaica	0.12%
Nepal	0.12%
Togo	0.12%
Côte d'Ivoire	0.10%
Bolivia	0.09%
Iran (Islamic Republic of)	0.09%
Pakistan	0.09%
Colombia	0.08%
Georgia	0.08%
Benin	0.08%
Cuba	0.08%
Bangladesh	0.07%
Madagascar	0.07%
Senegal	0.07%
Russian Federation	0.07%
Morocco	0.06%
Armenia	0.05%
Haiti	0.04%
South Africa	0.04%
Albania	0.04%
Sudan	0.04%
Namibia	0.04%
Mali	0.04%
Zambia	0.03%
Kosovo	0.03%
Lesotho	0.03%
Burundi	0.03%

Country	Share
Kyrgyzstan	0.03%
Kenya	0.02%
Mauritius	0.02%
Bosnia and Herzegovina	0.02%
Nigeria	0.01%
Saudi Arabia	0.01%
Mozambique	0.01%
Malaysia	0.01%
Myanmar	0.01%
Cameroon	0.01%
Angola	0.004%
Zimbabwe	0.004%
Venezuela	0.003%
Oman	0.002%
Algeria	0.002%
Uzbekistan	0.0008%
Swaziland	0.0006%
Malawi	0.0006%
Niger	0.0002%
Afghanistan	0.0002%
Belarus (Wild collection only)	
Bermudas (Processing)	
Chad (Wild collection only)	
Guinea-Bissau (Wild collection only)	
San Marino (Processing)	
Singapore (Processing)	
Total	**0.86%**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Development of the organic agricultural land

Compared with 1999, the area of organic agricultural land has more than trebled (Willer/Yussefi 2000). In 2012, the organic agricultural land increased by 185'833 hectares or 0.5 percent.

In 2012, the area of organic agricultural land increased in Africa and, Europe. The highest absolute growth was in Europe (+6 percent, +0.6 million hectares). A major decrease occurred in Asia, with the biggest decrease in India, where almost 600'000 hectares less were reported.

Eighty-one countries experienced an increase in the area of their organic agricultural land, while a decrease was reported in 45 countries. In 32 countries, the organic agricultural area either did not change or no new data were received. The largest increases of organic agricultural land were in Greece; followed by Mexico, Kazakhstan and Turkey.

The figures communicated in the following tables and graphs with historical figures may differ from previously communicated, as data revisions were received and included in the FiBL database. A major update was made for the United States, for which data for the years 2010 and 2011 became available in 2013. This also changed the global figure on organic agricultural land for these years. More information is available in the annex.

Table 6: World: Organic agricultural land (including in-conversion areas) by region: growth 2011/2012

Region	Organic agr. land (hectares) 2011	Organic agr. land (hectares) 2012	+/- in hectares	+/- percent %
Africa	1'073'404	1'145'827	+72'423	+6.75%
Asia	3'692'121	3'217'867	-474'254	-12.85%
Europe	10'535'550	11'171'413	+635'863	+6.04%
Latin America	6'855'457	6'836'498	-18'959	-0.28%
Northern America*	3'019'687	3'012'354	-7'333	-0.24%
Oceania	12'185'841	12'164'316	-21'525	-0.18%
Total**	37'359'076	37'544'909	+185'833	+0.50%

Source: FiBL-IFOAM survey 2014, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 286.
* For the United States the latest available data are from 2011.
** Total includes correction value for French Overseas Departments.

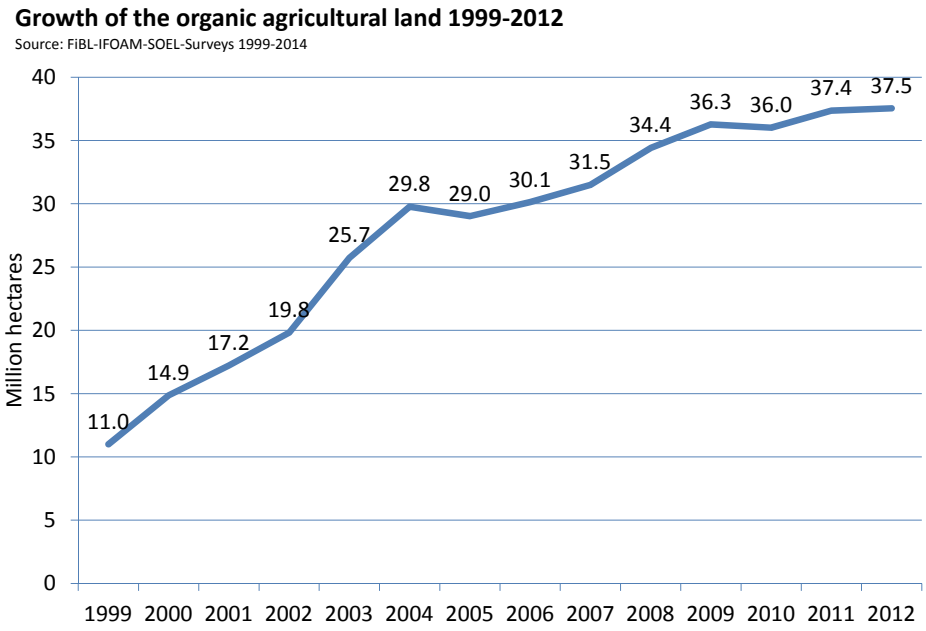


Figure 5: World: Growth of the organic agricultural land 1999-2012

Source: FiBL-IFOAM-SOEL surveys 2000-2014

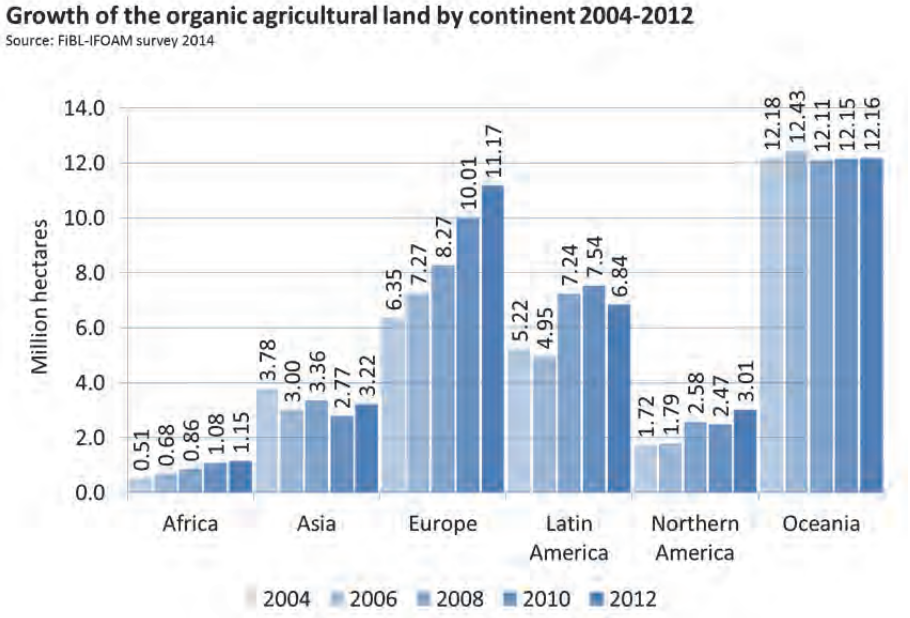


Figure 6: Growth of the organic agricultural land by continent 2004 to 2012

Source: FiBL-IFOAM-SOEL surveys 2000-2014

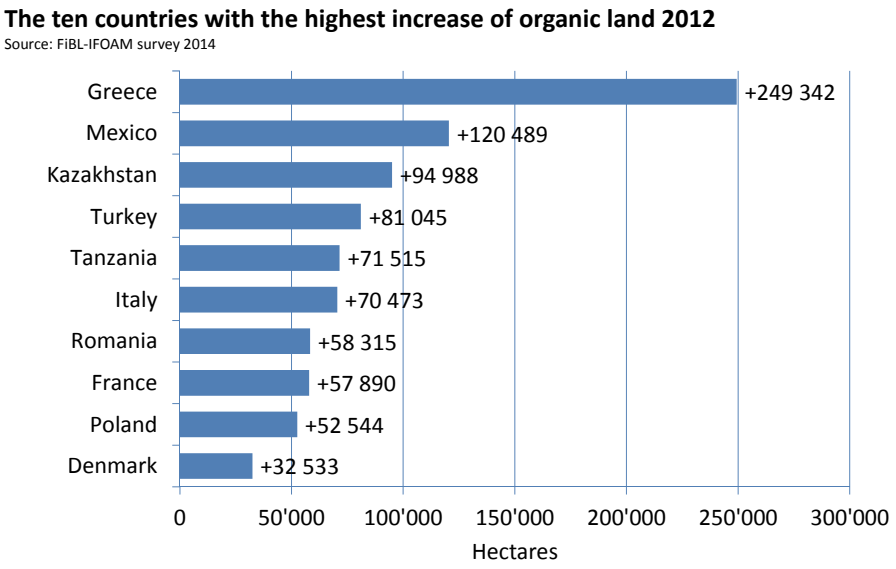


Figure 7: World: The ten countries with the highest increase of organic agricultural land 2012

Source: FiBL-IFOAM survey 2014, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 286.

Table 7: World: Development of organic agricultural land by country 2009-2012

Important note: A direct year-to-year comparison is not always possible for many countries, because the data sources may have changed over the years or data access may have improved. The figures published here may differ from previously published data due to data revisions. Data are not available for all countries for every year and, in these cases, the figure of the previous year is used (see also page 286).

Country	2009	2010	2011	2012	Change 11/12 [ha]	Change 11/12 %
Afghanistan	63	61	61	61		
Albania	271	284	448	515	67	14.9
Algeria	622	623	692	700	8	1.1
Andorra	2	2	4		-4	-100.0
Angola				2'486	2'486	100.0
Argentina	4'327'372	4'177'653	3'796'136	3'637'466	-158'670	-4.2
Armenia	600	750	750	810	60	8.0
Australia	12'001'724	12'001'724	12'001'724	12'001'724		
Austria	518'757	543'605	542'553	533'230	-9'323	-1.7
Azerbaijan	20'339	21'347	21'959	23'740	1'781	8.1
Bangladesh	1'162	799	6'810	6'860	50	0.7
Belarus			Wild collection			
Belgium	41'459	59'220	55'304	59'718	4'414	8.0
Belize	1'177	1'177	1'204	1'860	656	54.5
Benin	872	1'167	1'696	2'628	932	55.0
Bermuda			Processing			
Bhutan			6'150	6'156	5	0.1
Bolivia	41'004	112'109	32'710	32'710		
Bosnia and Herzegovina	580	580	343	343		
Brazil	932'120	932'120	687'040	705'233	18'194	2.6
Bulgaria	12'320	25'648	25'022	39'137	14'115	56.4
Burkina Faso	14'693	13'802	19'684	15'000	-4'684	-23.8
Burundi	350	350	550	550		
Cambodia	10'725	8'084	8'285	9'055	770	9.3
Cameroon	292	496	849	663	-186	-21.9
Canada	703'678	703'678	841'216	833'883	-7'333	-0.9
Chad			Wild collection only			
Channel Islands	370	360	250	250		
Chile	82'327	31'696	29'068	22'636	-6'432	-22.1
China	1'853'000	1'390'000	1'900'000	1'900'000		
Colombia	47'776	33'334	34'060	34'060		
Comoros	1'330	1'045	2'642	2'642		
Cook Islands		18	20	20		
Costa Rica	8'052	11'114	9'570	9'360	-210	-2.2
Côte d'Ivoire	17'443	18'133	20'658	19'457	-1'201	-5.8
Croatia	14'194	23'352	32'036	31'903	-132	-0.4

Country	2009	2010	2011	2012	Change 11/12 [ha]	Change 11/12 %
Cuba	14'314	2'106	2'209	5'280	3'071	139.0
Cyprus	3'575	3'575	3'575	3'923	348	9.7
Czech Republic	398'407	448'202	460'498	488'658	28'160	6.1
Democratic Republic of the Congo	6'667	32'523	41'032	51'838	10'806	26.3
Denmark	156'433	162'903	162'173	194'706	32'533	20.1
Dominica			240	240		
Dominican Republic	161'098	165'109	186'931	168'978	-17'953	-9.6
Ecuador	69'358	64'751	50'037	56'303	6'266	12.5
Egypt	56'000	82'167	82'167	82'167		
El Salvador	6'736	6'736	6'736	6'736		
Estonia	95'167	112'972	133'779	144'147	10'368	7.8
Ethiopia	122'727	137'196	140'475	164'777	24'301	17.3
Falkland Islands (Malvinas)	395'935	398'806	398'806	403'212	4'406	1.1
Faroe Islands	12	253	253	253		
Fiji	100	100	2'006	2'164	158	7.9
Finland	166'171	169'168	188'189	197'751	9'562	5.1
France	677'513	845'442	975'051	1'032'941	57'890	5.9
French Guiana (France)	2'651	1'776	3'974	2'407	-1'567	-39.4
French Polynesia		1'727	105	2'469	2'364	2251.4
Georgia	1'208	1'401	1'999	1'999		
Germany	947'115	990'702	1'015'626	1'034'355	18'729	1.8
Ghana	29'140	12'635	19'893	28'161	8'268	41.6
Greece	326'252	309'823	213'276	462'618	249'342	116.9
Grenada	40	85	85	85	0	0.0
Guadeloupe (France)	84	27	166	164	-2	-1.2
Guatemala	13'300	13'375	13'380	13'380		
Guinea-Bissau			Wild collection only			
Guyana	4'249	4'249	4'249	4'249		
Haiti	54	188	912	806	-106	-11.7
Honduras	11'801	17'825	23'826	24'950	1'123	4.7
Hungary	140'292	127'605	124'402	130'609	6'207	5.0
Iceland	6'661	5'806	8'246	8'240	-6	-0.1
India	1'180'000	780'000	1'084'266	500'000	-584'266	-53.9
Indonesia	59'141	83'630	74'034	88'247	14'213	19.2
Iran (Islamic Republic of)	8'853	7'256	43'332	42'634	-699	-1.6
Ireland	47'864	47'864	54'122	54'122		
Israel	6'969	8'794	7'095	6'187	-908	-12.8
Italy	1'106'684	1'113'742	1'096'889	1'167'362	70'473	6.4
Jamaica	542	542	542	542		
Japan	9'067	9'067	9'401	10'611	1'210	12.9

Statistics: Development of Organic Agricultural Land

Country	2009	2010	2011	2012	Change 11/12 [ha]	Change 11/12 %
Jordan	1'053	1'469	2'567	2'895	328	12.8
Kazakhstan	134'862	133'562	196'215	291'203	94'988	48.4
Kenya	4'227	4'842	4'969	4'894	-75	-1.5
Kosovo			11	111	100	900.0
Kyrgyzstan	11'415	15'040	15'097	2'696	-12'401	-82.1
Lao (PDR)	5'244	6'006	5'990	5'990		
Latvia	160'175	166'320	184'096	195'658	11'562	6.3
Lebanon	3'332	1'227	3'303	3'303		
Lesotho	330		183	617	434	237.6
Liechtenstein	1'005	1'020	1'095	1'086	-9	-0.8
Lithuania	129'055	143'644	152'305	156'539	4'234	2.8
Luxembourg	3'614	3'720	3'720	3'924	204	5.5
Macedonia (FYROM)	6'213	35'164	26'431	12'731	-13'700	-51.8
Madagascar	14'069	20'254	30'243	30'265	22	0.1
Malawi	994	824	166	35	-131	-78.7
Malaysia	1'582	1'582	1'582	603	-979	-61.9
Mali	21'681	15'199	14'790	14'927	137	0.9
Malta	26	24	23	26	3	13.0
Martinique (France)	140	193	298	200	-98	-32.9
Mauritius	6	35	30	16	-14	-46.8
Mexico	332'485	332'485	366'904	487'393	120'489	32.8
Moldova	32'105	32'105	22'102	22'102		
Montenegro	4'603	3'561	3'068	3'068		
Morocco	3'800	17'030	17'030	16'600	-430	-2.5
Mozambique	1'556	5'519	4'468	3'840	-628	-14.1
Myanmar	555	60	202	897	695	344.3
Namibia	124	124	14'112	14'123	11	0.1
Nepal	8'059	9'789	8'697	10'273	1'576	18.1
Netherlands	51'911	46'233	47'205	48'038	833	1.8
New Zealand	124'464	124'464	133'321	106'753	-26'568	-19.9
Nicaragua	33'621	33'621	33'621	33'621		
Niger	355	48	76	106	30	39.5
Nigeria	8'202	11'979	9'473	9'521	48	0.5
Niue	159	159	61	61	0	0.5
Norway	56'737	57'219	55'500	55'260	-240	-0.4
Occupied Palestinian Territory	1'000	6'354	6'354	6'354		
Oman	39	39	38	38		
Pakistan	20'321	22'103	24'924	22'397	-2'527	-10.1
Panama	5'244	3'242	4'576	4'576		
Papua New Guinea	3'321	3'156	11'337	11'798	461	4.1
Paraguay	51'190	51'223	51'190	51'190		

Country	2009	2010	2011	2012	Change 11/12 [ha]	Change 11/12 %
Peru	186'314	216'756	185'964	197'837	11'874	6.4
Philippines	51'806	79'992	96'317	80'974	-15'343	-15.9
Poland	367'062	521'970	609'412	661'956	52'544	8.6
Portugal	151'460	201'054	200'151	200'151		
Republic of Korea	13'343	15'518	19'312	25'467	6'155	31.9
Réunion (France)	188	276	556	594	38	6.8
Romania	168'288	182'706	229'946	288'261	58'315	25.4
Russian Federation	78'449	44'017	126'848	146'251	19'403	15.3
Rwanda	3'697	3'600	3'705	3'705		
Samoa	9'714	9'714	33'515	33'515		
San Marino			Processing only			
Sao Tome and Principe	3'591	4'411	4'467	4'051	-416	-9.3
Saudi Arabia	46'635	42'376	18'563	13'569	-4'994	-26.9
Senegal	25'351	28'175	13'000	6'736	-6'264	-48.2
Serbia	8'661	8'635	6'237	6'340	103	1.7
Singapore			Processing only			
Slovakia	145'490	174'471	166'700	166'700		
Slovenia	29'388	30'696	32'149	35'101	2'952	9.2
Solomon Islands	3'628	1'306	1'307	1'307		
South Africa	59'562	55'621	41'947	43'170	1'224	2.9
Spain	1'330'774	1'456'672	1'621'898	1'593'197	-28'701	-1.8
Sri Lanka	21'156	22'260	19'469	19'517	47	0.2
Sudan	77'798	53'602	53'017	54'845	1'828	3.4
Swaziland	46	6	14	8	-7	-45.8
Sweden	391'524	438'693	480'185	477'685	-2'500	-0.5
Switzerland	114'050	119'613	123'000	125'961	2'961	2.4
Syrian Arab Republic	35'439	19'987	19'987	19'987		
Taiwan	2'962	2'962	5'016	5'016		
Tajikistan	70	391	460	12'659	12'198	2649.3
Thailand	30'755	34'079	34'829	32'577	-2'252	-6.5
Timor-Leste	24'997	24'750	24'754	24'690	-64	-0.3
Togo	1'789	3'409	1'336	3'889	2'554	191.2
Tonga			248	398	150	60.5
Tunisia	167'302	175'066	178'521	137'188	-41'333	-23.2
Turkey	325'831	383'782	442'582	523'627	81'045	18.3
Uganda	226'954	228'419	228'166	231'157	2'991	1.3
Ukraine	270'193	270'226	270'320	272'850	2'530	0.9
United Arab Emirates	373	360	958	3'905	2'947	307.6
United Kingdom	721'726	699'638	638'528	590'009	-48'519	-7.6
Tanzania	72'188	72'665	115'022	186'537	71'515	62.2
United States of	1'948'946	1'769'001	2'178'471	2'178'471		

Statistics: Development of Organic Agricultural Land

Country	2009	2010	2011	2012	Change 11/12 [ha]	Change 11/12 %
America						
Uruguay	930'965	930'965	930'965	930'965		
Uzbekistan	324	65	209	213	4	1.9
Vanuatu	8'996	2'664	2'197	4'106	1'909	86.9
Venezuela	337	337	59	59		
Viet Nam	14'012	19'272	23'134	36'285	13'151	56.8
Zambia	7'310	7'310	7'310	7'310		
Zimbabwe	421	1'995	466	626	160	34.3
Total*	**36'277'491**	**36'017'570**	**37'357'065**	**37'544'909**	**185'833**	**+0.5%**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see previous editions of "The World of Organic Agriculture" and annex, page 286.
*Total includes correction value for French overseas departments.

All organic areas, including non-agricultural areas

Apart from the organic agricultural land, there are additional organic areas. The largest part of these are wild collection areas and areas for beekeeping. Further areas are for aquaculture, forest areas, and grazing areas on non-agricultural land. According to the FiBL-IFOAM survey, the total of these areas was more than 31 million hectares, and all organic areas together constituted 69 million hectares.

It should be noted, that many countries do not report the non-agricultural organic areas; they only communicate the organic agricultural land area.

Almost all of the non-agricultural areas are for wild collection and beekeeping. More information on the use of the wild collection areas is available in the corresponding chapter (page 82).

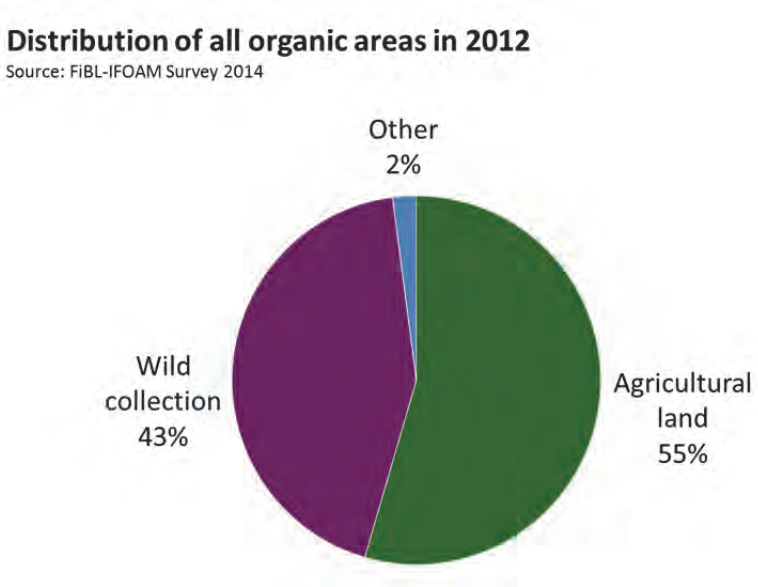


Figure 8: World: Distribution of all organic areas 2012. Total: 69 million hectares

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Table 8: World: Organic areas: Agricultural land (including conversion areas) and further organic areas by region in 2012

Region	Agricul-tural land [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agr. land [ha]	Wild collection* [ha]	Other non agr. Land [ha]	Total [ha]
Africa	1'145'827		15'479		9873768	840'000	11'875'074
Asia	3'217'867	30'712	123		6'864'134	8'677	10'121'513
Europe	11'171'413	1	27'048	6'121	10'695'304	8'326	21'908'214
Latin America	6'836'498	3'131	1'363	757	2'875'166		9'716'915
Oceania	12'164'316				765		12'165'081
Northern America	3'012'354			180'085	49'871		3'242'310
Total**	37'544'909	33'844	44'013	186'963	30'359'009	857'003	69'025'742

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.
Blank cells: No data available.
* Wild collection and beekeeping areas
** Total includes correction value for French overseas departments.

Table 9: World: All organic areas by country 2012

Country	Agr. land [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agr. [ha]	Wild collection [ha]	Other non agr. [ha]	Total [ha]
Afghanistan	61						61
Albania	515				467'783		468'298
Algeria	700						700
Angola	2'486						2'486
Argentina	3'637'466				573'984		4'211'450
Armenia	810				11'050		11'860
Australia	12'001'724						12'001'724
Austria	533'230						533'230
Azerbaijan	23'740		123		919		24'782
Bangladesh	6'860	9'338					16'198
Belarus					2'742		2'742
Belgium	61'315						61'315
Belize	1'860						1'860
Benin	2'628				376		3'004
Bermuda				Processing only			
Bhutan	6'156				15'605		21'760
Bolivia	32'710				785'453		818'163
Bosnia and Herzegovina	343				78'550		78'893
Brazil	705'233				1'209'773		1'915'006
Bulgaria	39'137				473'941		513'078
Burkina Faso	15'000				80'018		95'018
Burundi	550						550
Cambodia	9'055				72		9'127

Country	Agr. land [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agr. [ha]	Wild collection [ha]	Other non agr. [ha]	Total [ha]
Cameroon	663				110'000		110'663
Canada	833'883			180'085	49'871		1'063'839
Chad					11'000		11'000
Channel Islands	250						250
Chile	22'636		1'363	757	86'466		111'222
China	1'900'000				982'400		2'882'400
Colombia	34'060				6'850		40'910
Comoros	2'642				70		2'712
Cook Islands	20						20
Costa Rica	9'360						9'360
Côte d'Ivoire	19'457				344		19'801
Croatia	31'903		69			0	31'973
Cuba	5'280						5'280
Cyprus	3'923						3'923
Czech Republic	488'658						488'658
DR Congo	51'838						51'838
Denmark	194'706						194'706
Dominica	240						240
Dominican Republic	168'978				260		169'238
Ecuador	56'303	3'127			260		59'690
Egypt	82'167						82'167
El Salvador	6'736						6'736
Estonia	144'147				129'212		273'359
Ethiopia	164'777				180		164'957
Falkland Islands (Malvinas)	403'212						403'212
Faroe Islands	253						253
Fiji	2'164				653		2'817
Finland	197'751				7'007'363		7'205'114
France	1'032'941	1			3'380		1'036'322
French Guiana (France)	2'407						2'407
French Polynesia	2'469						2'469
Georgia	1'999				1'405		3'405
Germany	1'034'355						1'034'355
Ghana	28'161				19'813		47'974
Greece	462'618						462'618
Grenada	85						85
Guadeloupe (France)	164						164
Guatemala	13'380				5		13'385
Guinea-Bissau				Wild collection only			
Guyana	4'249				59'930		64'179
Haiti	806						806
Honduras	24'950						24'950

Statistics: All Organic Areas

Country	Agr. land [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agr. [ha]	Wild collection [ha]	Other non agr. [ha]	Total [ha]
Hungary	130'609						130'609
Iceland	8'240				212'436		220'676
India	500'000				4'700'000		5'200'000
Indonesia	88'247	94					88'341
Iran (Islamic Republic of)	42'634				38'035		80'669
Ireland	54'122						54'122
Israel	6'187						6'187
Italy	1'167'362				17'988	70	1'185'420
Jamaica	542				0		542
Japan	10'611					115	10'726
Jordan	2'895						2'895
Kazakhstan	291'203				863		292'066
Kenya	4'894				130'903		135'797
Kosovo	111						111
Kyrgyzstan	2'696						2'696
Lao (PDR)	5'990				16'786		22'776
Latvia	195'658						195'658
Lebanon	3'303				1'686	74	5'063
Lesotho	617				50'000		50'617
Liechtenstein	1'086					2	1'088
Lithuania	156'539						156'539
Luxembourg	3'924						3'924
Madagascar	30'265				23'711		53'975
Malawi	35				20'000		20'035
Malaysia	603						603
Mali	14'927				115		15'042
Malta	26						26
Martinique (France)	200						200
Mauritius	16						16
Mexico	487'393				30'364		517'757
Moldova	22'102						22'102
Montenegro	3'068				139'809		142'877
Morocco	16'600				418'000		434'600
Mozambique	3'840				31'400		35'240
Myanmar	897						897
Namibia	14'123				2'453'200		2'467'323
Nepal	10'273				24'422		34'695
Netherlands	48'038						48'038
New Zealand	106'753						106'753
Nicaragua	33'621				11'463		45'084
Niger	106						106
Nigeria	9'521		150				9'671
Niue	61				112		173
Norway	55'260						55'260
Occupied	6'354						6'354

Country	Agr. land [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agr. [ha]	Wild collection [ha]	Other non agr. [ha]	Total [ha]
Palestinian Territory							
Oman	38						38
Pakistan	22'397						22'397
Panama	4'576						4'576
Papua New Guinea	11'798						11'798
Paraguay	51'190						51'190
Peru	197'837	4			108'058		305'900
Philippines	80'974						80'974
Poland	661'956						661'956
Portugal	200'151		19'533				219'684
Republic of Korea	25'467						25'467
Réunion (France)	594						594
Romania	288'261				1'082'138		1'370'399
Russian Federation	146'251				20'646		166'897
Rwanda	3'705				80		3'784
Samoa	33'515						33'515
San Marino				Processing only			
Sao Tome and Principe	4'051						4'051
Saudi Arabia	13'569					8'488	22'056
Senegal	6'736				21'200		27'936
Serbia	6'340					80	6'420
Singapore				Processing only			
Slovakia	166'700						166'700
Slovenia	35'101						35'101
Solomon Islands	1'307						1'307
South Africa	43'170				156'608		199'779
Spain	1'593'197						1'593'197
Sri Lanka	19'517						19'517
Sudan	54'845				5'000	840'000	899'845
Swaziland	8						8
Sweden	477'685						477'685
Switzerland	125'961			6'121			132'082
Syrian Arab Republic	19'987				8'000		27'987
Taiwan	5'016						5'016
Tajikistan	12'659				1'055'890		1'068'549
Thailand	32'577	1'780			701		35'058
Macedonia (FYROM)	12'731				194'000		206'731
Timor-Leste	24'690						24'690
Togo	3'889				242		4'131
Tonga	398						398

Statistics: All Organic Areas

Country	Agr. land [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agr. [ha]	Wild collection [ha]	Other non agr. [ha]	Total [ha]
Tunisia	137'188		15'329		41'716		194'232
Turkey	523'627				535'317		1'058'944
Uganda	231'157				158'328		389'485
Ukraine	272'850				330'000		602'850
United Arab Emirates	3'905						3'905
United Kingdom	590'009		7'446			8'174	605'629
Tanzania	186'537				15'040		201'577
United States of America	2'178'471						2'178'471
Uruguay	930'965				2'300		933'265
Uzbekistan	213				5'000		5'213
Vanuatu	4'106						4'106
Venezuela	59						59
Viet Nam	36'285	19'500			1'300		57'085
Zambia	7'310				6'126'424		6'133'734
Zimbabwe	626						626
Total*	37'544'909	33'844	44'013	186'963	30'359'009	857'003	69'025'742

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.
Blank cells: No data available.
* Total includes correction value for French overseas departments.

Aquaculture

According to the FiBL-IFOAM survey approximately 33'800 hectares world-wide were used for organic aquaculture in 2012. Most of this area is in Vietnam (58 percent) and Bangladesh (28 percent).

More detailed information on organic aquaculture is available from Udo Censkowsky[1] of Organic Services GmbH / Gesellschaft für Internationale Zusammenarbeit (GIZ), who provided data based on a survey on organic aquaculture certified to EU regulation on organic agriculture. According to these data, global organic aquaculture is dominated by two types of organic seafood: organic salmon (*Salmo salar*) and penaid shrimp. With regard to farmed penaid shrimp, more than 21'000 hectares of pond area were certified according to the EU production rules for organic aquaculture in 2013; which 64 percent were also certified by Naturland Association. Major farmed species are Whiteleg shrimps (*Litopenaeus vannamei*) and Black Tiger shrimp (*Penaeus monodon*). Organic Black tiger shrimp is farmed in Bangladesh, India, Indonesia, Madagascar, Thailand and Vietnam. Organic Whiteleg shrimp are farmed in Brazil, Costa Rica, Ecuador and Peru. Ecuador; where organic shrimp farming was started in early 1999 due to a GIZ-funded development project, is still the largest supplier of organic shrimp but has lost market share. Major markets are Germany, France, Switzerland and United States.

Source: Organic Services GmbH / Gesellschaft für Internationale Zusammenarbeit (GIZ)

[1] Udo Censkowsky, Organic Services, Landsberger Straße 527, 81241 München, Germany, http://www.organic-services.com

Organic producers and other operator types 2012

Producers

More than 1.9 million organic producers were reported in the current survey. According to the data obtained, more than three quarters of the producers are in Asia, Africa, and Latin America (see Figure 9). The country with the most producers is India, followed by Uganda and Mexico (see Figure 10).

There has been an increase of almost 136'000 producers or 8 percent over 2011. In 2012 India, Turkey, Ethiopia, Mali and Tajikistan reported an increase of at least 10'000 producers each. The sum of these five countries represents almost the total global increase.

To find precise figures on the number organic farms remains difficult, as:

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

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

Table 10: World: Development of the numbers of producers by region 2011 to 2012

Continent	2011	2012	Change in numbers	Change in %
Africa	532'101	572'862	+40'761	+7.7%
Asia	620'455	684'873	+64'418	+10.4%
Europe	292'307	321'625	+29'318	+10.0%
Latin America	315'889	316'583	+694	+0.2%
Northern America	16'598	16'470	-128	-0.8%
Oceania	14'138	14'605	+467	+3.3%
Total	1'791'283	1'927'018	+132'735	+7.6%

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

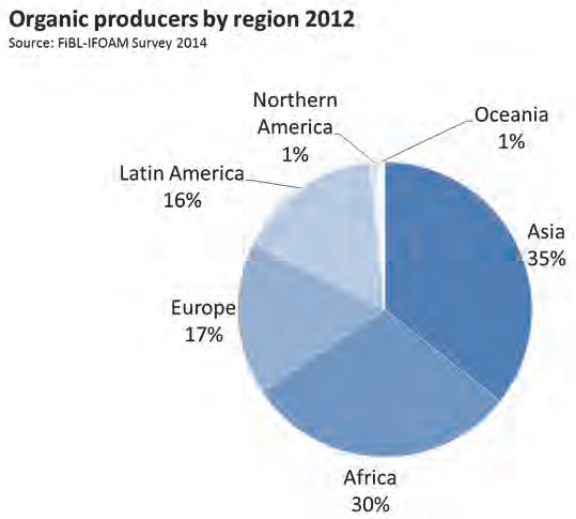


Figure 9: World: Distribution of organic producers by region 2012 (Total: 1.9 million producers)

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

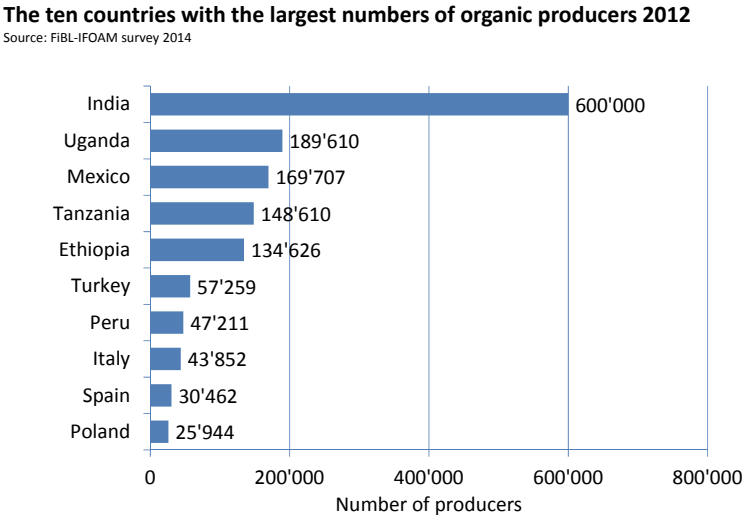


Figure 10: World: The countries with the highest numbers of organic producers 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Further operator types

Regarding data on further operator types, there are at almost 45'000 processors and at least 1'800 importers; most of these in Europe. However, not all countries reported the number of processors, exporters, importers or other operator types. For instance, data for the United States are missing, and it can be assumed that the number of processors, importers and exporters is far higher than that indicated in the table below.

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

Table 11: World: Organic producers and other operator types by country 2012

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

Country	Producers[1]	Processors	Importers	Exporters
Afghanistan	264 (2011)			
Albania	46	22	4	17
Algeria	57			
Angola		1		
Argentina	1'446	287 (2011)		122 (2011)
Armenia	24	10		
Australia	2'129 (2009)	765 (2011)		
Austria	21'843			
Azerbaijan	297	34		
Bangladesh	9'337			2 (2010)
Belarus	3			
Belgium	1'413	722	56	
Belize	1'291 (2011)			
Benin	3'269	4		9
Bermuda				
Bolivia (2011)	9'837	273		
Bosnia and Herzegovina(2011)	25	12		6
Brazil	12'526			
Bulgaria	2'754	81		14
Burkina Faso	11'265	22		24
Burundi (2010)	35			
Cambodia	5'818	2		4
Cameroon	88	8		16
Canada	3'590	1'237		
Chad				
Chile (2011)	446	133		88
Colombia (2011)	4'775	5	5	15
Comoros	1'416 (2011)	4 (2009)		4 (2009)

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

Country	Producers[1]	Processors	Importers	Exporters
Cook Islands	44			
Costa Rica	3'000 (2009)			
Côte d'Ivoire	277	8		11
Croatia	1'528	57	36	6
Cuba	7	5 (2010)		2 (2010)
Cyprus	719	53		
Czech Republic	3'934	454	9 (2011)	53 (2011)
D.R. of the Congo	1'123 (2008)	4		4
Denmark	2'651	703		
Dominican Republic	24'099	68		
Ecuador (2011)	9'485	38		
Egypt (2009)	790			
El Salvador (2007)	2'000			
Estonia	1'478	64		
Ethiopia	134'626			23
Falkland Islands (Malvinas)	8			
Faroe Islands				
Fiji	171	5		
Finland	4'322	352 (2011)	27 (2011)	
France	24'425	8'957	137	
French Guiana (France)	33	4		
French Polynesia	21			
Georgia	150			
Germany	23'032	8'293	308	
Ghana	1'915	19		9
Greece	23'433	1'551	4	
Grenada (2010)	3			
Guadeloupe (France)	33	5		
Guatemala	3'008 (2010)	23 (2011)		92 (2011)
Guyana (2009)	74			
Haiti	393			
Honduras (2011)	4'989	26		25
Hungary	1'560	414	14	
Iceland	35	25		4
India	600'000	699		669
Indonesia	6'627	22		
Iran (Islamic Republic of)	6'100	10 (2011)	2 (2011)	35 (2011)
Ireland (2011)	1'400	204	31	1
Israel	418	59 (2011)	22 (2011)	43
Italy	43'852	9'542	297	
Jamaica (2009)	80			
Japan	2'130	1'805	193	
Jordan	98	7		3
Kenya	12'647 (2011)			30
Kosovo				8
Kyrgyzstan	1'172			
Lao (PDR) (2011)	1'342			1
Latvia	3'496	87	2	

Statistics: Producers and Other Operator Types

Country	Producers[1]	Processors	Importers	Exporters
Lebanon (2011)	181	63	5	4
Lesotho	3	3		
Liechtenstein	35			
Lithuania	2'527	91		
Luxembourg	102	43 (2009)	3 (2009)	
Madagascar (2011)	14'550	135		135
Malawi	4	3		
Malaysia	119			
Mali	13'533	4		7
Malta (2011)	9			
Martinique (France)	30	6		
Mauritius (2011)	3			
Mexico	169'707	95		
Moldova (2011)	172			
Montenegro (2010)	62			
Morocco (2010)	120			
Mozambique	6	2		
Myanmar	15	1		
Namibia (2011)	6			
Nepal (2011)	247	4		4
Netherlands	1'646	1'035		
New Zealand	987	274	12	
Nicaragua (2009)	10'060	30		
Niger	2	1		2
Nigeria (2011)	596	80		80
Niue	122			
Norway	2'590	541	60	
Occupied Palestinian Territory (2010)	832			
Oman (2010)	4			
Pakistan	105	15		
Panama (2011)	10	2		
Papua New Guinea	9'185			
Paraguay (2007)	11'401			
Peru	47'211			153
Philippines	3'008	20		20
Poland	25'944	312	30	
Portugal (2011)	2'603			
Republic of Korea	16'733			
Réunion (France)	126	14		
Romania	15'315	105	3	
Russian Federation	56	20		
Rwanda (2011)	876			
Samoa	743	4 (2010)		
San Marino		2		
Sao Tome and Principe	2'180	3		3
Saudi Arabia	79			
Senegal	13'483	2		2
Serbia	1'073	32	30	9

Country	Producers[1]	Processors	Importers	Exporters
Singapore		2		
Slovakia (2011)	365	41	5	
Slovenia	2'682	177		
Solomon Islands	384			
South Africa	201	125		
Spain	30'462	2'790	111	127
Sri Lanka	404	78		6
Sudan	222	2		4
Swaziland				
Sweden	5'601	680	218	
Switzerland	6'173			
Syrian Arab Republic (2010)	2'458			
Taiwan (2011)	2'300			
Tajikistan	10'486	15		
Thailand	7'189			
Macedonia (FYROM)	554	11		
Timor-Leste (2009)	71			
Togo	8'858	11		15
Tonga	123			
Tunisia	2'302	100	20	53
Turkey	57'259	113	32	34
Uganda	189'610			
Ukraine	164	59	41	36
United Arab Emirates	34			
United Kingdom	4'281		95	
Tanzania	148'610			28 (2011)
United States of America (2011)	12'880			
Uruguay (2006)	630			
Uzbekistan				1
Vanuatu	696			
Venezuela (2009)				
Viet Nam	6'829	33 (2010)		4
Zambia (2009)	10'055			
Zimbabwe (2011)	3			
Total	**1'927'018**	**44'444**	**1'817**	**2'081**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.
Blank cells: No data available.

Market and international trade data

Domestic sales

Whereas Amarjit Sahota presents global trends and a global figure for the organic market, along with much background information, in this volume (page 127), here we show the country-related data that was compiled under the framework of the global survey on organic agriculture. For Europe, data collection was carried out with the German Agrarmarkt Informations-Gesellschaft (AMI) in the framework of the OrganicDataNetwork project (see also article on the European Market on page 207). Data on total domestic sales value were available for more than 50 countries.

The countries with the largest market for organic food are the United States, followed by Germany and France. The largest single market is the United States followed by the European Union. The highest per capita consumption in 2012 was in Switzerland (189 euros per capita), followed by Denmark (159 euros per capita) and Luxembourg (143 euros per capita).

Some countries also provide a breakdown by product, be it in value (euros) or volume (tons), and the European OrganicDataNetwork project will make these data accessible for Europe during 2014 on its website at www.organicdatanetwork.net. In addition to the total sales values, Table 12 also provides figures on the per capita consumption in 2012. More details of European domestic sales are available; please see the European chapter for corresponding tables, page 207.

Export data

International trade data are available for more and more countries. These can be expressed as total export/import volumes in tons or as values. Some countries also provide a breakdown by crop and product. Table 12 shows the values of total exports, where available. A total of 41 countries had data on the export values.

It should be noted though that the export values are not strictly comparable as they may refer to different stages of the value chain.

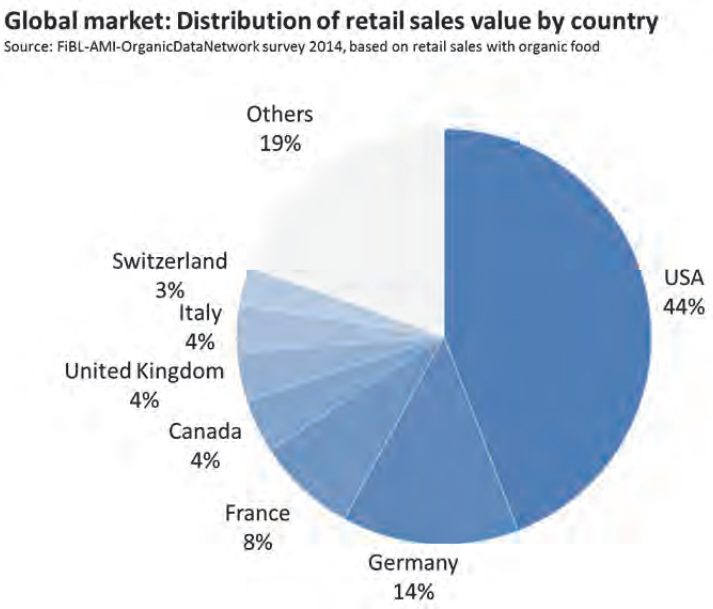


Figure 11: Global market of organic food: Distribution of retail sales by country 2012

Source: FiBL-AMI- OrganicDataNetwork survey 2014, based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 286

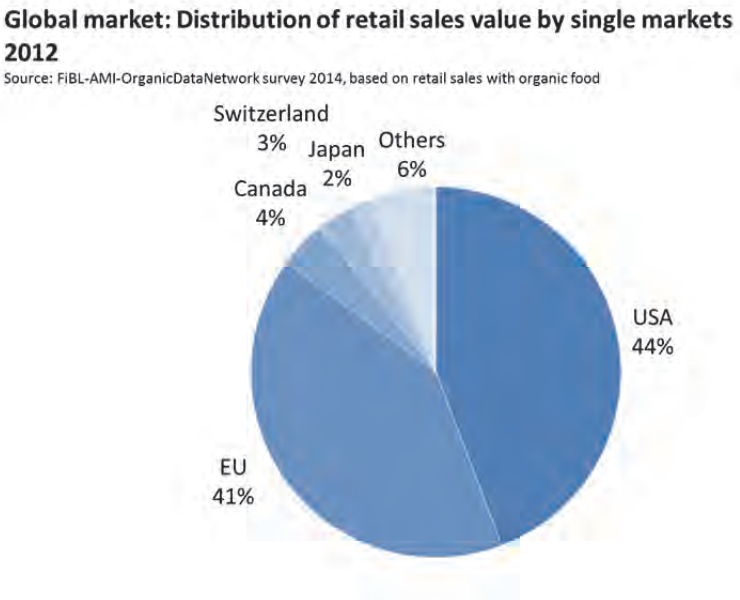


Figure 12: Global market of organic food: Distribution by single market 2012

Source: FiBL-AMI-OrganicDataNetwork s survey 2014, based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 286

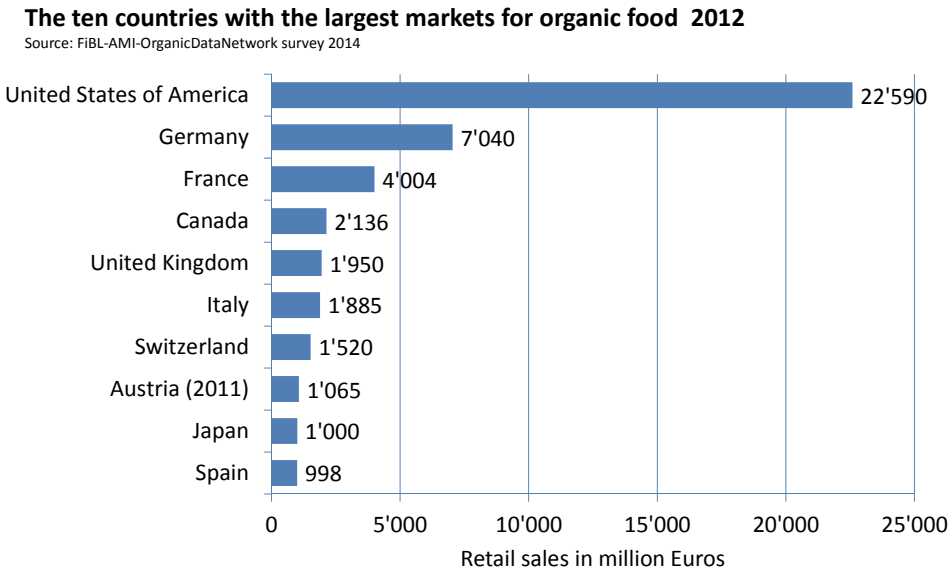


Figure 13: Global market: The countries with the largest markets for organic food 2012

Source: FiBL-AMI-OrganicDataNetwork survey 2014, based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 286

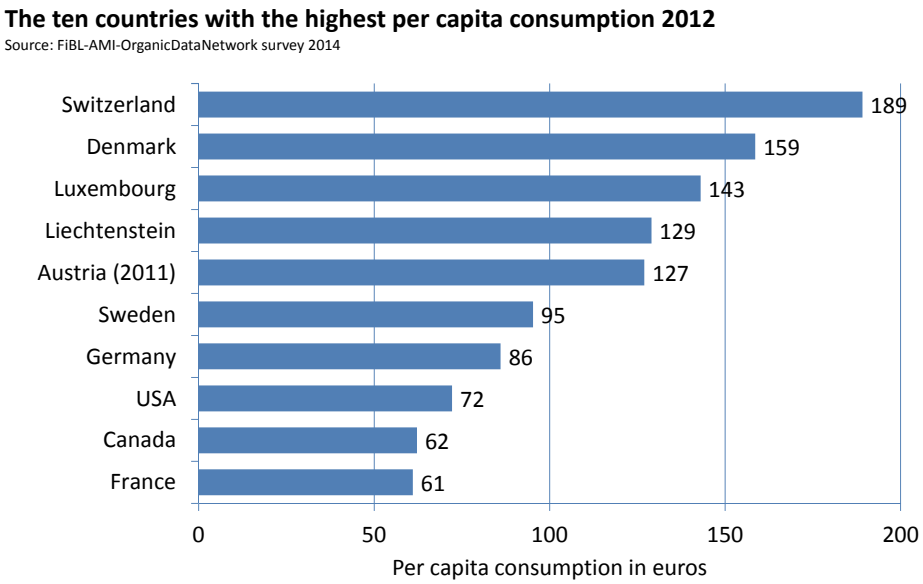


Figure 14: Global market: The countries with the highest per capita consumption 2012

Source: FiBL-AMI-OrganicDataNetwork survey 2014, based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 286

Table 12: Global market data: Domestic sales, per capita consumption, and exports by country 2012

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

Country	Data year	Retail sales [Mio €]	€/person	Export [Mio €]
Argentina	2009			122.3
Australia	2012	927.0	41.0	101.6
Austria	2011	1'064.7	127.0	79.7
Azerbaijan	2011	2.6	0.3	
Belgium	2012	417.1	37.6	
Bolivia	2011			178.7
Bosnia and Herzegovina	2010	1.0	0.1	
	2011			2.3
Brazil	2010			187.5
	2012	570.0	2.9	
Bulgaria	2010	7.0	0.9	
Cambodia	2009			1.0
Canada	2012	2'135.6	62.2	356.6
Chile	2009	1.8	0.1	37.7
China	2009	790.8[1]	0.6	
	2011			233.5
Colombia	2007			13.0
Costa Rica	2008	1.4	0.3	
	2009			19.0
Croatia	2011			2.9
	2012	104.0	25.0	
Cyprus	2006	1.5	1.9	
Czech Republic	2011	66.2	6.0	23.0
Denmark	2012	887.0	158.6	156.5
Dominican Republic	2011			206.0
Estonia	2011	20.0	14.9	
Ethiopia	2010			25.6
Falkland Islands (Malvinas)	2009			2.1
Finland	2012	202.0	37.4	9.0
France	2012	4'004.0	61.0	309.0
Germany	2012	7'040.0	86.0	
Greece	2010	60.0	5.3	
Hungary	2009	25.0	2.5	20.0
India	2012	130.0	0.1	291.2
Ireland	2012	98.7	22.1	
Italy	2012	1'885.0	31.0	1'200.0
Japan	2009	999.7	7.8	
Kenya	2008	0.3	0.0	
Kosovo	2012			4.9
Kyrgyzstan	2012			0.2

[1] There are estimates the Chinese market for organic food is considerably higher than the number shown in this table and that is has reached a size of more than two billion US dollars. Official data do however not exist.

Statistics: Market and International Trade Data

Country	Data year	Retail sales [Mio €]	€/person	Export [Mio €]
Latvia	2011	4.0	2.0	
Liechtenstein	2012	4.7	129.0	
Lithuania	2011	6.0	2.0	
Luxembourg	2012	75.0	143.0	
Mexico	2008	20.5	0.2	
	2012			389.2
Moldova	2011			15.0
Montenegro	2010	0.1	0.2	
Netherlands	2012	791.4	47.2	783.00
New Zealand	2012	81.9	18.6	135.5
Norway	2012	209.3	42.0	
Paraguay	2011			71.4
Peru	2011	13.7	0.5	193.4
Poland	2011	120.0	3.1	
Portugal	2011	21.0	2.0	
Romania	2011	80.0	3.7	200.0
Russian Federation	2009			4.0
	2012	120.0	0.8	
Samoa	2010	0.0	0.1	0.1
Senegal	2012			0.9
Serbia	2010	40.0	5.5	
Slovakia	2010	4.0	0.7	
Slovenia	2009			0.1
	2012	44.0	22.0	
Spain	2012	998.0	20.9	589.7
Sweden	2012	905.0	95.3	
Switzerland	2012	1'520.3	189.1	
Thailand	2009	50.8	0.7	50.8
Tunisia	2011			40.2
Turkey	2009	3.6	0.1	19.8
Uganda				34.2
Ukraine	2011	5.1	0.1	
United Kingdom	2012	1'950.0	32.0	
United States of America	2012	22'589.5	72.2	
Viet Nam	2012			204.0

Source: FiBL-AMI- OrganicDataNetwork survey 2014, based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 286
Blank cells: No data available.

Organic farming in developing countries and in emerging markets

The countries listed on the Development Assistance Committee (DAC) list of recipients for Official Development Assistance (ODA) from the Organization for Economic Cooperation and Development (OECD) are analyzed in this section.[1] More than 1.5 million producers from de DAC countries were counted. They constituted almost 80 percent of all organic producers. More than one-third of the world's organic agricultural land - 11.3 million hectares - is located in countries listed on the DAC list. If wild collection and beekeeping areas are included, the total area is 33 million hectares. Most of the agricultural land is in Latin American countries (6.4 million hectares), with Asia (3.2 million) and Africa (1.1 million) in second and third place. The countries with the largest areas of organic agricultural land are Argentina, China, India, Uruguay and Brazil (in that order). Not surprisingly, they are all large countries (Figure 15).

However, when it comes to organic agricultural land as a percentage of total area under agriculture, the order is different. The highest percentages of organic agricultural land are in the Dominican Republic, some Pacific Island countries, and Sao Tome and Principe. Argentina, with by far the largest area under organic management (with 3.6 million hectares), is ranked sixth when organic agricultural area is expressed as a proportion of the total agricultural area. In the top ten countries on the DAC list, the shares of organic land are comparable to those in many European countries. These high shares can probably be attributed in part to a high potential for, and focus on, exports. Support activities may also play a role. However, out of all countries on the DAC list that was covered in the survey, only a few have a proportion of organic agricultural land that is higher than one percent of the total agricultural area (Figure 16).

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

Table 13: Countries on the DAC list: Development of organic agricultural land 2006-2012

Continent	2006	2007	2008	2009	2010	2011	2012
Africa	684'803	862'351	855'400	1'026'445	1'075'521	1'072'848	1'145'233
Asia	2'964'020	2'855'370	3'297'940	3'500'058	2'689'884	3'629'209	3'150'217
Europe	127'443	152'351	120'158	346'159	432'006	479'120	546'735
Latin America	4'950'560	5'586'745	6'821'159	7'261'483	7'142'809	6'452'213	6'430'515
Oceania	22'623	22'623	22'623	25'918	17'117	50'691	53'370
Total	8'749'449	9'479'439	11'117'280	12'160'062	11'357'338	11'684'080	11'326'070

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

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

The ten countries on the DAC list with the largest areas of organic agricultural land 2012

Source: FiBL-IFOAM survey 2014

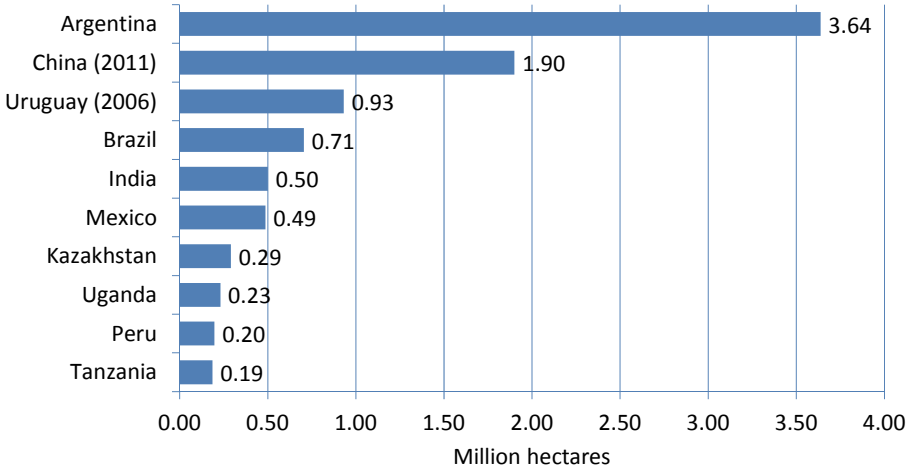


Figure 15: Countries on the DAC list: the countries with the largest areas of organic agricultural land in 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

The ten countries on the DAC list with the highest shares of organic agricultural land 2012

Source: FiBL-IFOAM survey 2014

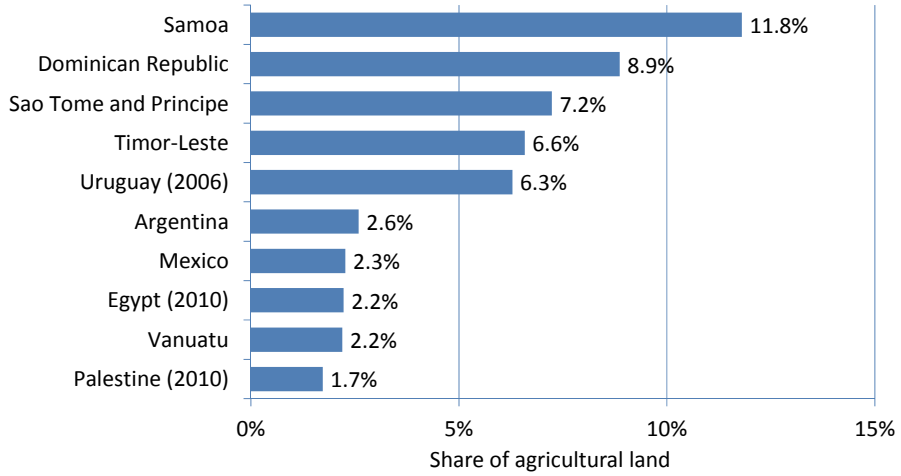


Figure 16: Countries on the DAC list: the countries with the highest shares of organic agricultural land in 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

.

Land use and crop data

Almost two-thirds of the 37.5 million hectares of organic agricultural land in 2012 was grassland/grazing areas (22.5 million hectares). The cropland area (arable land with 7.5 million hectares and permanent crops with 3.2 million hectares) constituted 10.7 million hectares and thus more than a quarter of the organic agricultural land. The cropland area is probably much higher because details on land use are not available for some countries with large organic agricultural areas, for example India. General land use information was available for almost 90 percent of the organic agricultural land, which does not however mean that detailed crop information is available for all areas as not all countries provided detailed crop data.[1]

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

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

– Africa: Land use information was available for about two thirds of the organic agricultural land in Africa. Almost half of the agricultural land is used for permanent crops. The main permanent crops are cash crops such as coffee and olives. For land use details in Africa see page 155.
– Asia: Some land use details are known for sixty percent of the organic agricultural land in Asia. Arable land is mainly used for cereals, including rice. Furthermore, cotton is important. For land use details in Asia see page 183.
– Europe: In Europe, the agricultural land use is relatively well known, and the main crop categories are well documented. Permanent pastures and arable land have approximately equal shares of the organic agricultural area. The arable land is mainly used for the cultivation of green fodder (almost 2 million hectares) followed by cereals (1.9 million hectares). Permanent crops account for ten percent of organic agricultural land. More than one third of this land was used for olives, followed by grapes, nuts, and fruits. For land use details in Europe see page 217.
– Latin America and the Caribbean: Most of the organic agricultural land in Latin America for which information was available is permanent pasture. Permanent crops account for about one tenth of the agricultural area. About half of the

[1] For some countries, only information on the main uses (arable crops, permanent crops, and permanent grassland) was available. For other countries, very detailed statistical land use information can be found. The Eurostat statistics, for instance, list each vegetable type for many countries.
[2] For more details, see the FAOSTAT homepage, faostat.fao.org at Home > Concepts and Definitions > Glossary, or http://faostat.fao.org/site/379/DesktopDefault.aspx?PageID=379
[3] For details, see www.organic-world.net. For the data collected, a classification system developed in cooperation with AMI, the German Agricultural Market Information Company, is used. The questionnaire, as well as some background information, is also available at www.organic-world.net.

permanent cropland is used for coffee, followed by cocoa and tropical fruits. For land use details in Latin America and the Caribbean see page 231.

– North America: As in Europe, arable land and permanent grassland/grazing areas have almost equal shares. A major proportion of the arable land is used for cereal production and cultivation of green fodder. For land use details in North America see page 251.
– Oceania: Most of the land in Australia is used for extensive grassland/grazing areas, and only little information is available about the remaining land. For land use details in Oceania see page 268.

Table 14: World: Land use in organic agriculture by region (including in-conversion areas) 2012

Land use	Africa	Asia	Europe	Latin America	Northern America	Oceania
Agricultural land, no details	364'739	933'306	145'727	1'094'083	161'498	281'283
Arable crops	168'801	1'277'956	4'682'398	186'799	1'131'700	38'679
Cropland, no details	12'832	339'071	2'013	33'472	378'920	46'269
Other agricultural land	23'328	59'896	324'409	10'298	69'308	
Permanent crops	544'758	585'773	1'097'101	820'898	120'219	63'891
Permanent grassland/grazing areas	31'369	21'865	4'919'765	4'690'947	1'150'709	11'734'194
Total	1'145'827	3'217'867	11'171'413	6'836'498	3'012'354	12'164'316

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.
Totals include correction values for some countries for land with double use during one year.

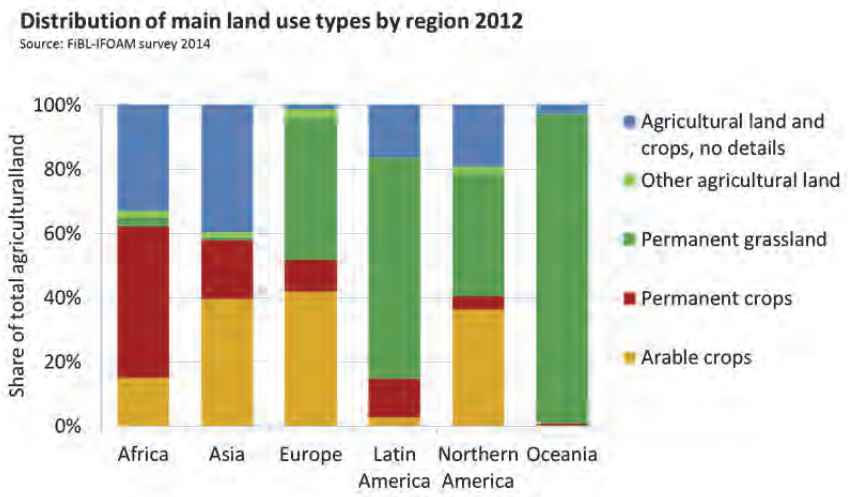


Figure 17: World: Distribution of main land use types by region 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

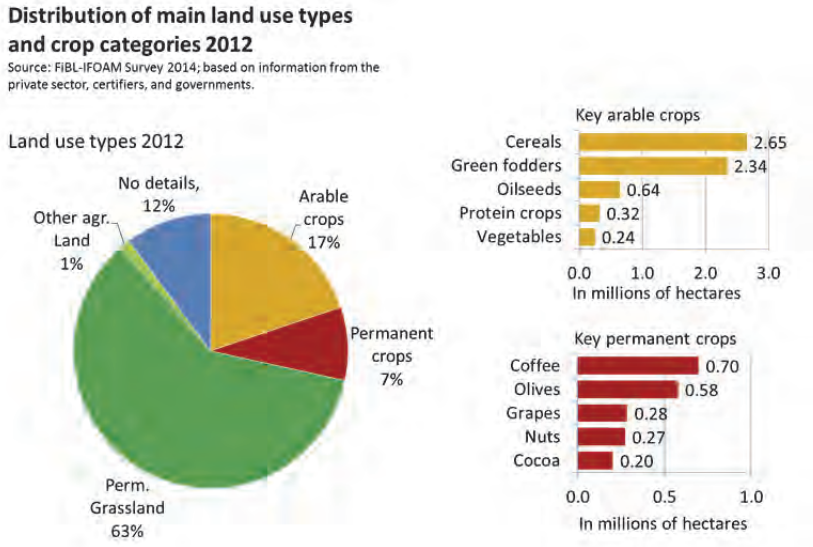


Figure 18: World: Distribution of main land use types and crop categories 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

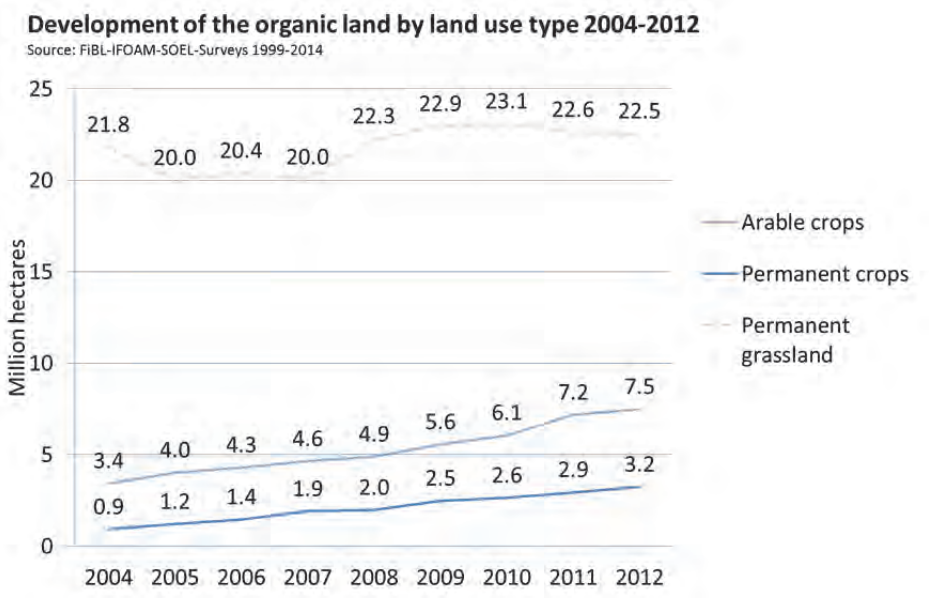


Figure 19: World: Development of organic arable land, permanent cropland and permanent grassland/grazing areas 2004-2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Table 15: World: Land use and crop categories in organic agriculture worldwide 2012

Land use	Crop group	Area [ha]
Agricultural land, no details	Agricultural land, no details	2'977'271
Arable crops	Arable crops, no details	914'379
	Cereals	2'652'864
	Cultivated mushrooms	317
	Flowers and ornamental plants	9'631
	Green fodder from arable land	2'339'386
	Hops	198
	Industrial crops	18'334
	Medicinal and aromatic plants	71'183
	Mixed cereal grains	6'276
	Mushrooms and truffles	720
	Oilseeds	643'104
	Protein crops	316'066
	Root crops	54'913
	Seeds and seedlings	3'808
	Strawberries	3'280
	Sugarcane	59'134

Land use	Crop group	Area [ha]
	Textile crops	86'969
	Tobacco	1'026
	Vegetables	244'856
	Other arable crops	59'888
Arable crops total		7'486'333
Cropland, no details		812'577
Other agricultural land total		487'239
Permanent crops	Berries	42'566
	Citrus fruit	65'838
	Cocoa	205'419
	Coconut	58'122
	Coffee	695'959
	Flowers and ornamental plants, permanent	57
	Fruit, no details	291'018
	Fruit, temperate	156'768
	Fruit, tropical and subtropical	209'969
	Grapes	284'265
	Medicinal and aromatic plants, permanent	39'821
	Nurseries	95
	Nuts	271'294
	Olives	576'041
	Tea/mate, etc.	97'592
	Other permanent crops	237'817
Permanent crops total		3'232'640
Permanent grassland/grazing areas total		22'548'849
Total		**37'544'909**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Arable land

With a total of at least 7.5 million hectares, organic arable land constitutes 20 percent of the world's organic agricultural land and 0.5 percent of the world's total arable land.[1] An increase of 4.4 percent over 2011 was reported, and there was an increase in almost all crop categories. Almost two thirds of the arable land is located in Europe, followed by Asia (17 percent), North America (15 percent) and Latin America (3 percent) (see Figure 20).

Most of this category of land is used for cereals including rice (almost 2.6 million hectares), followed by green fodder (2.3 million hectares), and oilseeds (0.6 million hectares).

Table 16: Use of organic arable land (including in-conversion areas), 2011 and 2012 compared

Crop group	2011	2012	Change in hectares	Change in %
Arable crops, no details	930'877	914'379	-16'498	-1.8
Cereals	2'506'089	2'652'864	146'775	5.9
Cultivated mushrooms	253	317	64	25.3
Flowers and ornamental plants	294	9'631	9'337	3178.7
Green fodder from arable land	2'264'091	2'339'386	75'294	3.3
Hops	238	198	-40	-17.0
Industrial crops	20'579	18'334	-2'245	-10.9
Medicinal and aromatic plants	84'913	71'183	-13'730	-16.2
Mixed cereal grains		6'276	6'276	100.0
Mushrooms and truffles	1'637	720	-917	-56.0
Oilseeds	616'522	643'104	26'582	4.3
Protein crops	292'900	316'066	23'167	7.9
Root crops	53'015	54'913	1'898	3.6
Seeds and seedlings	3'914	3'808	-106	-2.7
Strawberries	3'050	3'280	230	7.6
Sugarcane	50'547	59'134	8'587	17.0
Textile crops	68'087	86'969	18'882	27.7
Tobacco	161	1'026	866	539.4
Vegetables	231'262	244'856	13'594	5.9
Other arable crops	40'733	59'888	19'155	47.0
Total	**7'169'160**	**7'486'333**	**317'173**	**4.4**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.
Not all countries included in the survey provided data on land use or crop areas.

[1] There were 1'396'279'040 hectares of arable land in 2011 according to FAOSTAT, FAO, Rome. See the FAO Homepage: faostat.fao.org > Resources > Resourcestat > http://faostat.fao.org/site/377/default.aspx#ancor

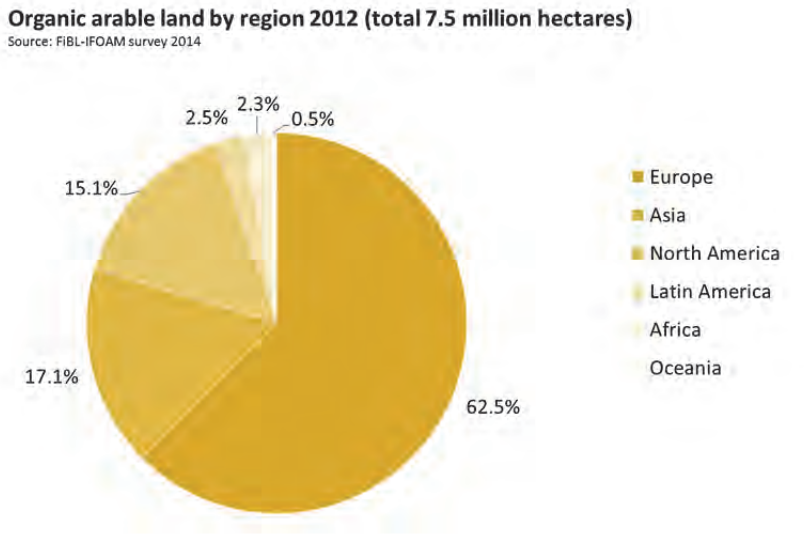


Figure 20: World: Distribution of organic arable cropland by region 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

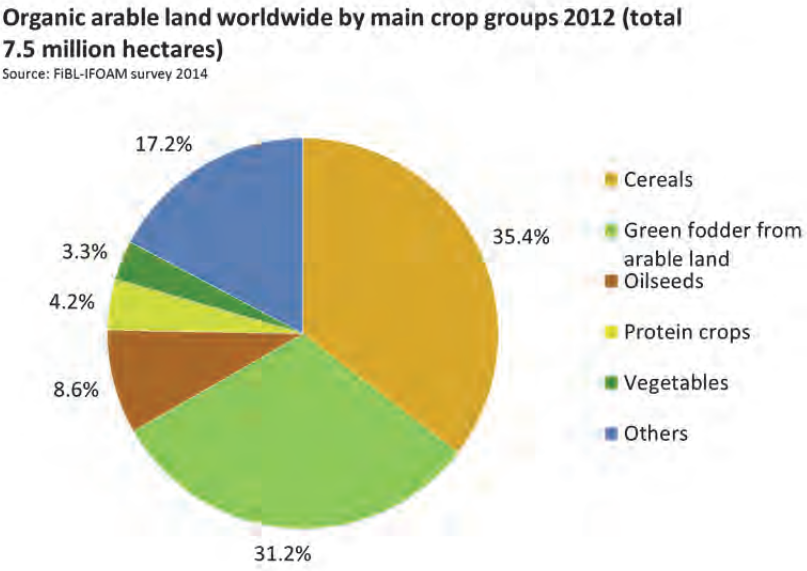


Figure 21: World: Use of arable cropland by crop group 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Permanent crops

Permanent crops account for more than 3.2 million hectares, which is 2 percent of the world's permanent cropland.[1] Compared with the previous survey, an increase of almost 300'000 hectares more was reported. With almost nine percent, permanent cropland has a higher share in organic agriculture than in total agriculture, where permanent crops account for approximately three percent of the total. Most of the permanent cropland is in Europe (1.1 million hectares), followed by Latin America (0.8 million hectares), and Asia (0.6 million hectares) (see Table 14). The most important crops are coffee, with almost 0.7 million hectares reported and constituting one quarter of the organic permanent cropland, followed by olives (0.6 million hectares), grapes (0.3 million hectares), nuts (0.27 million hectares) and cocoa (0.2 million hectares).

Table 17: Use of organic permanent cropland (including in-conversion areas), 2011 and 2012 compared

Crop group	2011	2012	Change in hectares	Change in %
Berries	40'959	42'566	1'607	3.9
Citrus fruit	54'382	65'838	11'456	21.1
Cocoa	225'802	205'419	-20'383	-9.0
Coconut	37'271	58'122	20'851	55.9
Coffee	627'333	695'959	68'625	10.9
Flowers and ornamental plants	64	57	-6	-9.6
Fruit	22'794	15'759	-7'035	-30.9
Fruit, temperate	148'300	156'768	8'468	5.7
Fruit, tropical and subtropical	191'254	209'969	18'716	9.8
Fruit/nuts/berries	268'775	275'259	6'484	2.4
Grapes	264'601	284'265	19'663	7.4
Medicinal and aromatic plants	47'374	39'821	-7'553	-15.9
Nurseries	499	95	-404	-81.0
Nuts	272'357	271'294	-1'063	-0.4
Olives	538'592	576'041	37'449	7.0
Other permanent crops	101'939	237'817	135'878	133.3
Tea/mate, etc.	98'120	97'592	-529	-0.5
Total	2'940'416	3'232'640	292'224	9.9

Source: FiBL-IFOAM-survey 2014, based on data from governments, the private sector, and certifiers.
For detailed data sources see annex, page 286.
Blank cells: No data available. Not all countries included in the survey provided data on land use or crop areas.

[1] There were 153'937'700 hectares of permanent cropland in 2011 according to FAOSTAT, FAO, Rome. See the FAO Homepage: faostat.fao.org > Resources > Resourcestat > Land at http://faostat.fao.org/site/377/DesktopDefault.aspx?PageID=377#ancor

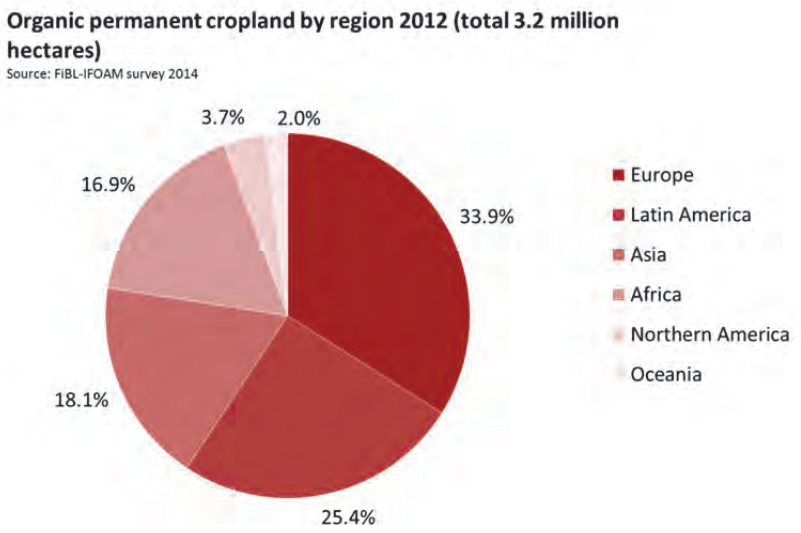


Figure 22: World: Distribution of permanent cropland by region 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

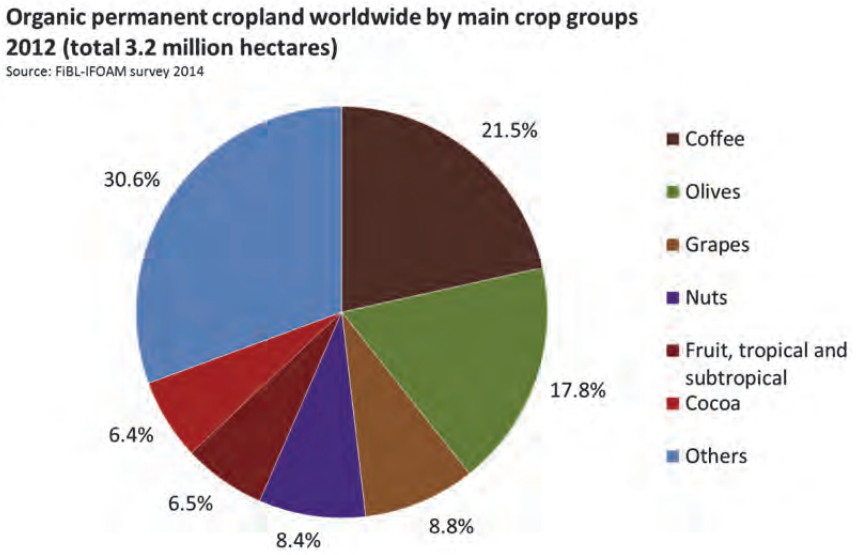


Figure 23: World: Use of permanent cropland by crop group 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Wild collection and beekeeping areas

The collection of wild harvested crops is defined in the IFOAM Basic Standards, and wild collection activities are regulated by organic laws. A collection area (including beekeeping) of 30 million hectares was reported in 2012. The organic wild collection areas are concentrated in Europe, Africa, Asia, and Latin America (Figure 24); the distribution is thus quite different from that of the organic agricultural land.

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

Wild berries, medicinal and aromatic plants, as well as shea nuts in Africa and Brazil nuts in Latin America play the most important role. Unfortunately, details on the harvested crops were only available for about one third of the wild collection area (see Table 19).

Table 18: Wild collection and beekeeping areas by region 2012

Continent	2011	2012	Change in hectares	Change in %
Africa	11'088'694	9'873'768	-1214926	-11%
Asia	5'731'572	6'864'134	+1'132'562	+19.8%
Europe	11'569'083	10'695'304	-873'778	-7.6%
Latin America	3'079'479	2'875'166	-204'312	-6.6%
Northern America	225'435	49'871	-175'564	-77.9%
Oceania	1'564	765	-799	-51.1%
Total	**31'695'827**	**30'359'009**	**-1'336'818**	**-4.2%**

Source: FiBL-IFOAM survey 2014, based on data from governments, the private sector, and certifiers. For detailed data sources see annex, page 286.

Table 19: Wild collection and beekeeping areas by crop group 2012

Land use	Area [ha]
Apiculture	6'804'699
Berries, wild	7'007'624
Forest honey	110'130
Fruit, wild	24'706
Marula, wild	70'000
Medicinal and aromatic plants, wild	3'126'711
Mushrooms, wild	2'902
Nuts, wild	983'322
Oil plants, wild	455'494
Palm sugar	72
Palmito, wild	66'780
Seaweed	200'000
Wild collection, no details	11'441'497
Wild collection, other	65'073
Total	**30'359'009**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

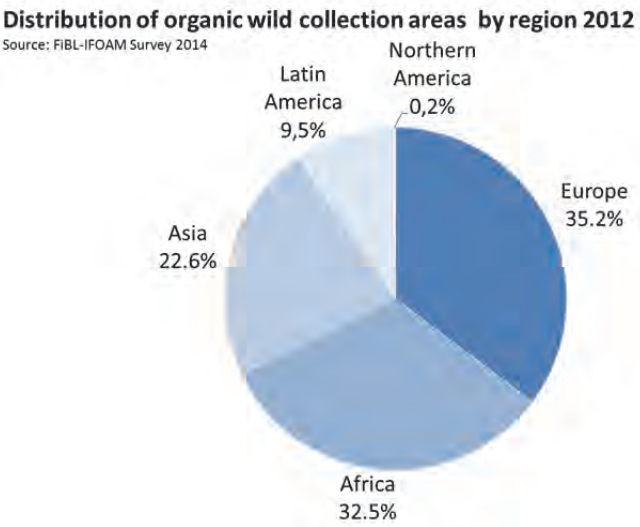


Figure 24: World: Distribution of organic wild collection and beekeeping areas in 2012

Source: FiBL-IFOAM survey 2014, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 286.

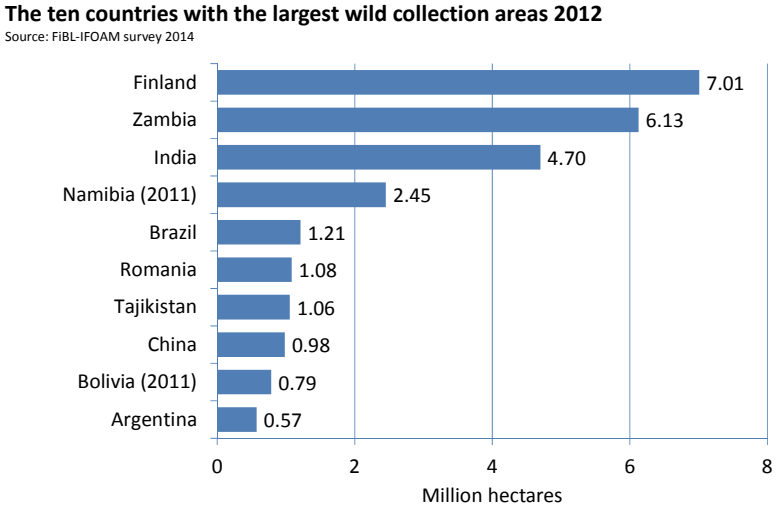


Figure 25: World: The ten countries with the largest organic wild collection and beekeeping areas in 2012

Source: FiBL-IFOAM survey 2014, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 286.

Table 20: Wild collection and beekeeping areas by country 2012

Country	Crop group	Area [ha]
Albania	Medicinal and aromatic plants, wild	467'783
Argentina	Apiculture	569'612
	Wild collection, no details	4'372
Armenia	Wild collection, no details	11'050
Azerbaijan	Berries, wild	161
	Fruit, wild	421
	Medicinal and aromatic plants, wild	177
	Nuts, wild	160
Belarus	Berries, wild	100
	Mushrooms, wild	2'642
Benin	Nuts, wild	376
Bhutan	Wild collection, no details	15'605
Bolivia	Nuts, wild	785'453
Bosnia and Herzegovina	Wild collection, no details	78'550
Brazil	Wild collection, no details	1'209'773
Bulgaria	Medicinal and aromatic plants, wild	1'144
	Wild collection, no details	472'701
	Wild collection, other	96
Burkina Faso	Nuts, wild	65'631
	Oil plants, wild	14'008
	Wild collection, no details	69
	Wild collection, other	310
Cambodia	Palm sugar	72
Cameroon	Forest honey	110'000
Canada	Wild collection, no details	49'871
Chad	Wild collection, other	11'000
Chile	Wild collection, no details	86'466
China	Wild collection, no details	982'400
Colombia	Palmito, wild	6'850
Comoros	Medicinal and aromatic plants, wild	29
	Wild collection, no details	41
Côte d'Ivoire	Nuts, wild	344
Dominican Republic	Apiculture	130
	Forest honey	130
Ecuador	Mushrooms, wild	260
Estonia	Wild collection, no details	129'212
Ethiopia	Apiculture	180
Fiji	Wild collection, other	653
Finland	Berries, wild	7'007'363
France	Wild collection, no details	3'380
Georgia	Apiculture	12
	Wild collection, no details	1'393
Ghana	Nuts, wild	19'813
Guatemala	Apiculture	5
Guyana	Palmito, wild	59'930
Iceland	Seaweed	200'000
	Wild collection, no details	12'436
India	Wild collection, no details	4'700'000
Iran (Islamic Republic of)	Wild collection, no details	38'035
Italy	Wild collection, no details	17'988
Kazakhstan	Medicinal and aromatic plants, wild	863
Kenya	Bee pastures	89'417
	Oil plants, wild	41'486
Lao People's Democratic Republic	Wild collection, no details	16'786

Country	Crop group	Area [ha]
Lebanon	Medicinal and aromatic plants, wild	18
	Nuts, wild	7
	Wild collection, no details	1'661
Lesotho	Wild collection, no details	50'000
Madagascar	Fruit, wild	141
	Medicinal and aromatic plants, wild	20'152
	Nuts, wild	3'364
	Wild collection, no details	13
	Wild collection, other	41
Malawi	Wild collection, no details	20'000
Mali	Nuts, wild	115
Mexico	Apiculture	7'455
	Fruit, wild	6'032
	Medicinal and aromatic plants, wild	60
	Wild collection, no details	3'687
	Wild collection, other	13'130
Montenegro	Medicinal and aromatic plants, wild	139'809
Morocco	Fruit, wild	18'000
	Oil plants, wild	400'000
Mozambique	Wild collection, other	31'400
Namibia	Medicinal and aromatic plants, wild	2'453'200
Nepal	Wild collection, no details	24'422
Nicaragua	Apiculture	11'463
Niue	Fruit, wild	112
Peru	Nuts, wild	108'058
Romania	Wild collection, no details	1'082'138
Russian Federation	Medicinal and aromatic plants, wild	6'800
	Wild collection, no details	13'846
Rwanda	Medicinal and aromatic plants, wild	68
	Wild collection, no details	12
Senegal	Wild collection, no details	18'000
	Wild collection, other	3'200
South Africa	Marula, wild	70'000
	Medicinal and aromatic plants, wild	36'608
	Wild collection, no details	50'000
Sudan	Wild collection, other	5'000
Syrian Arab Republic	Wild collection, no details	8'000
Tajikistan	Wild collection, no details	1'055'890
Thailand	Wild collection, no details	701
The former Yugoslav Republic of Macedonia	Wild collection, no details	194'000
Togo	Wild collection, other	242
Tunisia	Wild collection, no details	41'716
Turkey	Wild collection, no details	535'317
Uganda	Wild collection, no details	158'328
Ukraine	Wild collection, no details	330'000
United Republic of Tanzania	Wild collection, no details	15'040
Uruguay	Wild collection, no details	2'300
Uzbekistan	Wild collection, no details	5'000
Viet Nam	Wild collection, no details	1'300
Zambia	Apiculture	6126424
Total		**30'359'009**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Beehives

More than 1 million organic beehives were reported in 2012, which represent more than one percent of the world's total global beehives, according to FAO data from 2011.[1] The organic beehives are concentrated mainly in Europe (57 percent) and Africa (22 percent) (see Figure 26). The countries with the largest numbers of organic beehives are Zambia (191'434), followed by Italy (128'241) and France (90'051) (Figure 28). Their number has almost doubled since 2007 when there were 525'000 beehives (Figure 27).

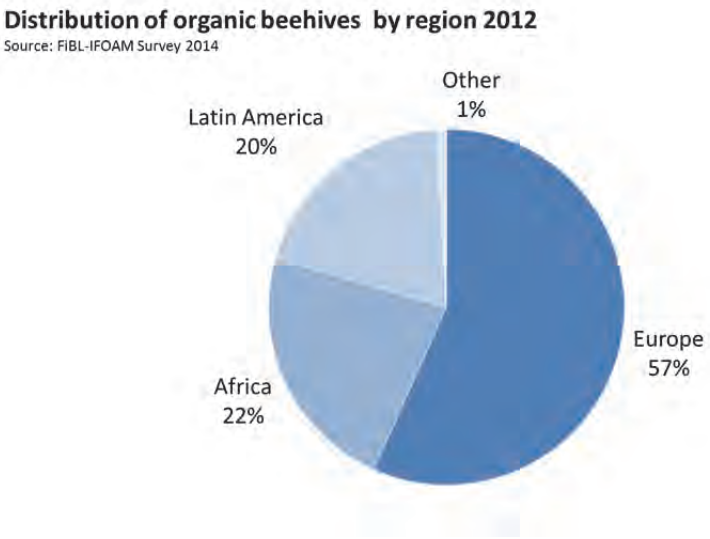


Figure 26: World: Distribution of organic beehives by region in 2012

Source: FiBL-IFOAM survey 2014, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 286.

[1] According to FAO, there were 78'411'621 beehives in 2011. The FAOSTAT website > Production > Live animals at http://faostat.fao.org/site/573/DesktopDefault.aspx?PageID=573#ancor

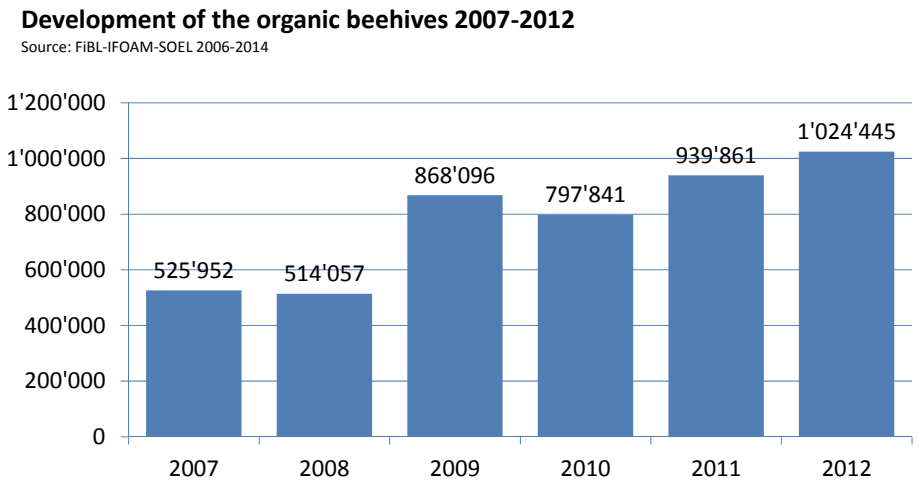


Figure 27: Development of the organic beehives 2007-2012

Source: FiBL-IFOAM-SOEL surveys 2006-2014. For detailed data sources see annex, page 286.

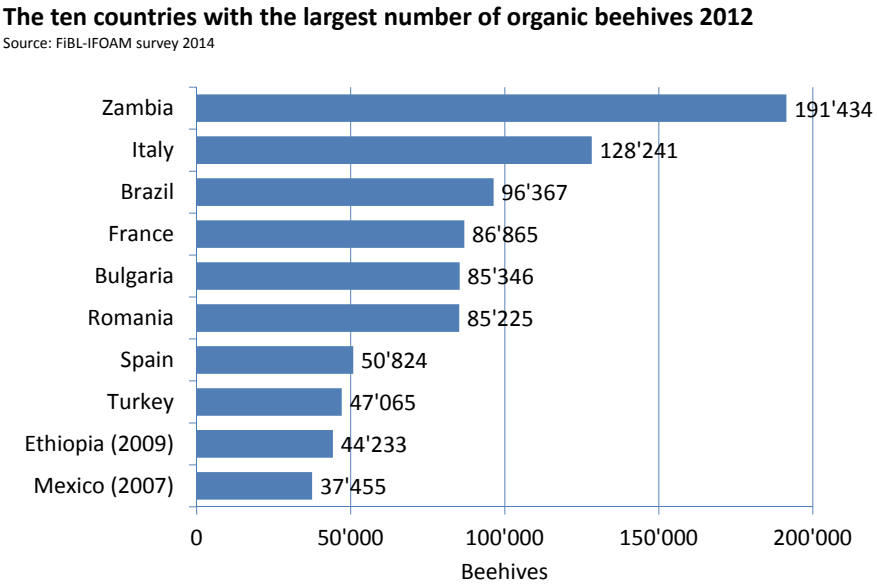


Figure 28: The ten countries with the largest number of organic beehives in 2012

Source: FiBL-IFOAM- survey-2014. For detailed data sources see annex, page 286.

Table 21: Number of beehives by country 2012

Country	2012
Argentina	31'156
Armenia	526
Australia	6'475
Austria	17'982
Azerbaijan	867
Belgium	200
Bosnia and Herzegovina	373
Brazil	96'367
Bulgaria	85'346
Burkina Faso	11
Canada	85
Chile	3'417
Croatia	2'462
Cuba	24'100
Czech Republic	551
Estonia	917
Ethiopia	44'233
Finland	3'030
France	86'865
French Guiana (France)	21
Georgia	570
Greece	14'865
Guadeloupe (France)	36
Hungary	19'296
Italy	128'241
Kosovo	40
Latvia	16'701
Lebanon	345
Liechtenstein	1
Lithuania	806
Luxembourg	512
Martinique (France)	120
Mexico	37'455
Montenegro	159
Morocco	500
Nicaragua	13'367
Norway	1'454
Poland	1'989
Portugal	15'927
Réunion (France)	300
Romania	85'225
Saudi Arabia	582
Senegal	32
Serbia	961
Slovakia	448
Slovenia	1'598
South Africa	4
Spain	50'824
Sweden	2'182
Switzerland	3'365
Tunisia	757
Turkey	47'065
Ukraine	300
Zambia	191'434
Total	**1'042'445**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Statistics on selected crops

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

It should be noted that the organic areas are compared with the *area harvested in 2011* as provided by FAO. The data may not necessarily be directly comparable to the areas sown or planted as registered by the certification bodies, and may differ from which crops were harvested, due to natural catastrophes for instance.

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

Data on conversion status: For some countries, data were collated from several certifiers, some of which provided information on the conversion status while others did not. Therefore, the sum of land under conversion and the fully converted land is not necessarily the total land under organic agricultural management in all cases (=conversion land, fully converted land and land for which no such details were available).

The tables presented here are an example of the information available, including other crops, in the FiBL database.

Table 22: Selected key crops in organic agriculture 2012 (overview): Land under organic management (including conversion areas)

Crops	Africa	Asia	Europe	Latin America	North America	Oceania	Total
Cereals	6'446	186'972	1'898'248	28'168	530'305	2'724	2'652'864
Citrus fruit	9'561	576	34'196	13'497	7'528	480	65'838
Cocoa	27'817	294		177'276		31	205'419
Coffee	194'544	59'131		431'034		11'249	695'959
Fruit, temperate	1'567	8'044	119'660	6'950	19'277	1'270	156'768
Fruit, tropical and subtropical	20'220	37'251	16'390	128'936	6'717	454	209'969
Grapes	1'017	8'544	241'732	14'281	15'908	2'782	284'265
Oilseeds	59'223	233'187	193'504	37'083	119'890	217	643'104
Olives	111'732	2'252	456'373	5'213		470	576'041
Protein crops	1'949	18'633	244'260	242	50'964	18	316'066
Vegetables	10'587	13'912	105'154	51'291	62'523	1'388	244'856

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

› Cereals

Table 23 shows that at least 2.6 million hectares of cereals were under organic management in 2012. Comparing the organic figure with FAO's figure for the world's harvested cereal area of 707 million hectares in 2011 (FAOSTAT),[1] 0.4 percent of the total cereal area is under organic management.

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

The key cereal producers worldwide, according to FAO, are India (100.5 million hectares), China (91 million hectares), the United States (56.7 million hectares), and the Russian Federation (40.6 million hectares).

Of these four countries, with the exception of India and China, information on the organic cereal area was available. The United States (almost 330'000 hectares) and Italy (210'000 hectares) are the largest organic cereal producers. In the United States 0.6 percent of the total cereal area was organic, and in Italy the organic cereal area represented a very important share; constituting 6.1 percent of the total cereal area. Italy was followed by Germany and Canada (both with more than 200'000 hectares) and Turkey with almost 200'000 hectares.

Some countries reach proportions that are far higher than the global organic cereal proportion of 0.4 percent. For, Austria (12 percent), Sweden (8.8 percent), Estonia (8 percent), and Lithuania (6.3 percent) greatly exceed the overall 0.4 percent.

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

The organic cereal area has increased by more than 50 percent since 2004 (1.6 million hectares), and in 2012 it increased by 150'000 hectares or 6 percent.

The available data on the conversion status indicate that 16 percent of the organic cereal area was in-conversion in 2012 (almost half a million hectares). If this is indicative, there could be a considerable increase in supply of organic cereals in the near future.

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

Figure 29: Cereals: Development of the global organic area 2004-2012
Source: FiBL-IFOAM-SOEL 2006-2014

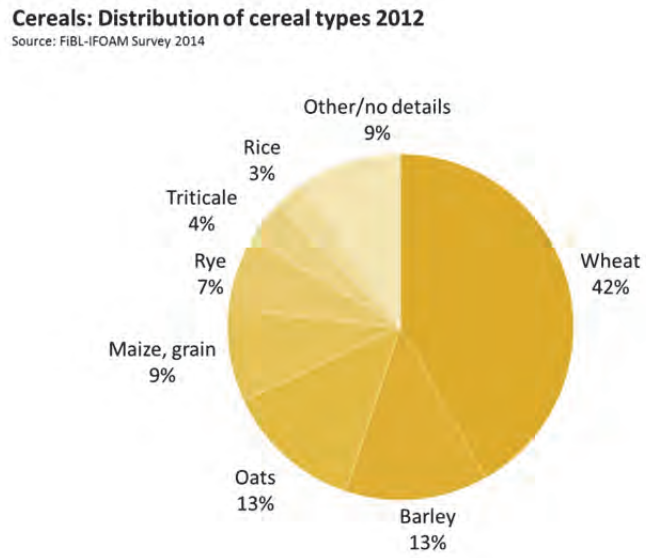


Figure 30: Cereals: Distribution of cereal types 2012
Source: FiBL-IFOAM survey 2014

Table 23: Organic cereal area 2012

Country	Organic area [ha]	Organic Share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	15'845	0.1%		
Australia	2'724	0.0%		
Austria	97'178	12.0%		
Azerbaijan	2'186	0.2%	548	1'638
Bangladesh	101	0.0%		
Belgium	4'265	1.3%	2'878	1'388
Bolivia	904	0.1%	435	469
Bosnia and Herzegovina	45	0.0%	45	
Bulgaria	7'532	0.4%	2'762	4'771
Burkina Faso	23	0.0%		
Cambodia	1'995	0.1%	1'988	7
Canada	201'832	1.5%		
Chile	226	0.0%		
Colombia	2	0.0%	2	
Costa Rica	55	0.1%		
Croatia	7'261	1.3%	2'602	4'659
Cyprus	752	2.0%	727	25
Czech Republic	24'382	1.7%	17'616	6'765
Denmark	56'239	3.8%	50'911	5'328
Dominican Republic	350	0.2%		
Ecuador	880	0.1%	869	11
Estonia	23'626	8.0%	20'006	3'620
Finland	39'143	3.7%	39'143	
France	133'195	1.4%	103'163	30'032
Georgia	35	0.0%	4	31
Germany	202'000	3.1%		
Greece	51'544	5.4%	24'593	26'951
Hungary	27'029	1.0%	25'134	1'895
Indonesia	1'142	0.0%		
Iran (Islamic Republic of)	35	0.0%	25	10
Israel	1'762	2.3%	1'667	95
Italy	210'543	6.1%	174'368	36'175
Japan	3'098	0.2%	3'098	
Jordan	125	0.1%		
Kazakhstan	130'882	0.8%	101'210	25'000
Kyrgyzstan	777	0.1%	378	398
Lao (PDR)	1'030	0.1%		
Latvia	30'771	5.9%	24'455	6'316
Lebanon	27	0.1%	27	
Liechtenstein	62	-	51	11

Country	Organic area [ha]	Organic Share [%]	Area fully converted [ha]	Area under conversion [ha]
Lithuania	66'923	6.3%	50'244	16'679
Luxembourg	633	2.2%		
Madagascar	89	0.0%		
Malta	0.1	0.0%	0.1	
Mexico	4'267	0.0%	4'267	
Moldova	8'399	1.0%		
Myanmar	60	0.0%	60	
Namibia	400	0.1%		
Netherlands	4'075	2.0%	3'586	489
Nigeria	6	0.0%		
Norway	8'844	3.0%	7'653	1'191
Pakistan	9'633	0.1%		
Peru	2'839	0.2%	2'398	
Philippines	554	0.0%	508	
Poland	122'818	1.6%	79'609	43'209
Republic of Korea	9'177	1.0%		
Romania	105'148	2.0%	51'903	53'246
Russian Federation	3'304	0.0%	1'781	1'008
Saudi Arabia	184	0.1%	99	85
Senegal	3'490	0.3%	152	3'338
Serbia	2'522	0.1%		
Slovakia	15'406	2.1%	10'768	4'638
Slovenia	1'386	1.4%	1'064	322
South Africa	805	0.0%	656	99
Spain	174'005	2.9%	143'805	30'200
Sweden	86'538	8.8%	77'926	8'612
Switzerland	6'690	4.6%		
Taiwan	1'654	-	1'654	
Thailand	22'514	0.2%		
Macedonia (FYROM)	2'255	1.4%	943	1'312
Tunisia	1'088	0.1%	1'088	
Turkey	197'877	1.7%	86'068	111'809
Ukraine	127'733	0.9%		
United Kingdom	48'123	1.6%	46'643	1'482
United Republic of Tanzania	456	0.0%	128	328
United States of America	328'474	0.6%		
Uruguay	2'800	0.4%	2'800	
Zimbabwe	89	0.0%		89
Total	**2'652'864**	**0.4%**	**1'174'510**	**433'730**

Source: FiBL-IFOAM Survey 2014; based on information from the private sector, certifiers, and governments.
For detailed data sources see annex, page 286.
Blank cells: No data available.

› Citrus fruit

The area of organic citrus fruits is shown in Table 24 , which includes oranges, lemons, limes, grapefruit, pomelos, and "other citrus". According to these data, almost 66'000 hectares of citrus fruit are grown organically worldwide. This constitutes 0.8 percent of the world's total citrus area of 8.7 million hectares in 2011 (FAOSTAT).[1]

As no crop details for the organic area were available for some of the world's leading citrus producers - China (2.3 million hectares), Brazil (0.9 million hectares), Nigeria (0.8 million hectares) and India (0.75 million hectares) - it can be assumed that the world figures for the area under organic citrus is higher.

In organic agriculture, the largest producer is Italy with over 25'000 hectares constituting 14.9 percent of Italy's harvested citrus fruit area, followed by Mexico (12'000 hectares, 2.2 percent), and the United States (7'500 hectares, 2.3 percent).

Ghana has the highest proportion of organic citrus fruit with 29.3 percent of the harvested citrus fruit area, according to the available data. It is followed by Italy (14.9 percent) and France (12.4 percent).

Since 2004, when 28'500 hectares of organic citrus were grown, the area has more than doubled.

Crop details were available for about one third of the organic citrus fruit area: Oranges were grown in 55 percent of the citrus area, followed by lemons and limes with 13 percent (see Figure 31). The available data on the conversion status indicate that 14 percent of the organic citrus area was in-conversion in 2012 (9'000 hectares). If this is indicative, there could be a considerable increase in supply of organic citrus fruit in the near future.

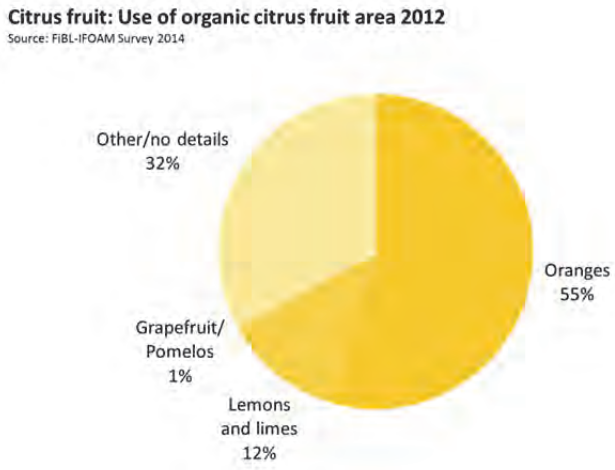


Figure 31: Citrus fruit: Use of organic citrus fruit area 2012
Source: FiBL-IFOAM survey 2014

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

Table 24: Organic citrus fruit 2012

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Australia	480	1.7%		
Azerbaijan	8	0.3%	2	6
Chile	42	0.3%		
Croatia	0.1	0.0%		0.1
Cuba	398	1.2%	398	
Cyprus	67	2.3%	60	7
Dominican Republic	250	1.1%	150	100
Ecuador	9	0.0%	9	
El Salvador	9	0.2%	9	
France	299	12.4%	198	101
Georgia	7	0.0%		7
Ghana	6'783	29.3%	272	
Greece	1'521	3.0%	1'275	246
Indonesia	33	0.1%		
Iran (Islamic Republic of)	1	0.0%		1
Israel	256	1.6%	215	40
Italy	25'340	14.9%	19'292	6'048
Jordan	50	0.7%		
Lebanon	201	2.2%	201	
Madagascar	12	0.1%		
Malta	1	0.5%	0.1	1
Mexico	12'245	2.2%	12'245	
Morocco	700	0.7%	700	
Myanmar	20	-	20	
Paraguay	60	0.5%	60	
Peru	75	0.1%	56	
South Africa	2'035	2.7%	859	233
Spain	6'275	2.0%	4'281	1'994
Tunisia	31	0.1%	31	
Turkey	693	0.7%	453	240
United States of America	7'528	2.3%		
Uruguay	410	2.6%	410	
Total	**65'838**	**0.8%**	**41'198**	**9'023**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.
Blank cells: No data available.

› Cocoa beans

More than 200'000 hectares of cocoa were grown organically in 2012. This constitutes 2.1 percent of the world's harvested cocoa bean area of 9.9 million hectares 2011 (FAOSTAT).

The world's leading producers are Côte d'Ivoire (2.5 million hectares), Indonesia (1.7 million hectares), Ghana (1.6 million hectares), and Nigeria (1.3 million hectares).

The largest organic cocoa areas are in the Dominican Republic (118'00 hectares), Mexico (19'000 hectares), and Peru (13'000 hectares).

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

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

The available data on the conversion status indicate that 8 percent of the organic cocoa area was in conversion in 2012 (16'000 hectares). If this is indicative, a slight increase in supply of organic cocoa in the near future may be expected.

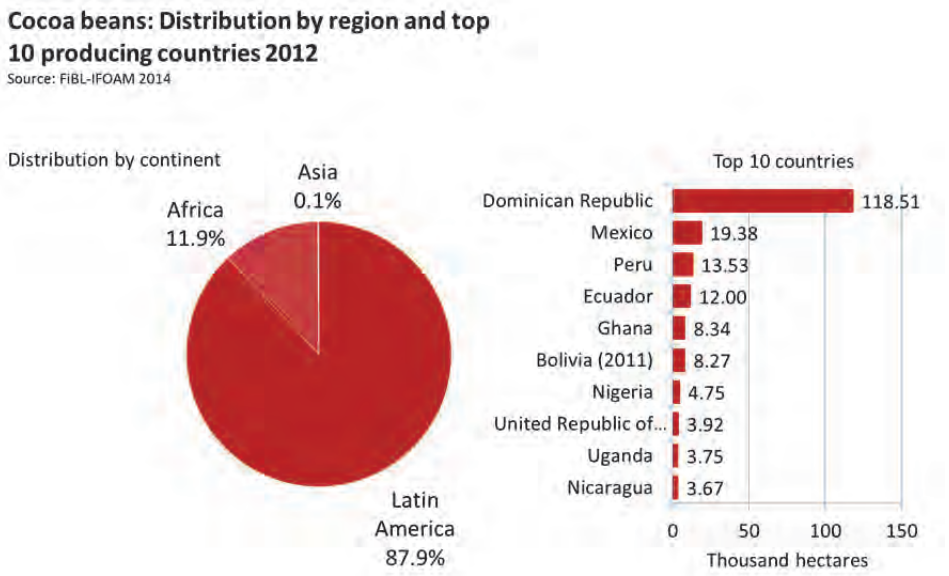


Figure 32: Cocoa beans: Distribution by region and top 10 producing countries 2012
Source: FiBL-IFOAM survey 2014

Table 25: Organic cocoa bean area 2012

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Belize	656	-%	642	14
Bolivia	8'266	86.8%	4'919	3'347
Colombia	164	0.2%	164	
Costa Rica	282	6.1%		
Côte d'Ivoire	81	0.0%		
Dominican Republic	118'513	77.3%	108'234	10'279
Ecuador	11'997	3.0%	11'764	233
Ghana	8'336	0.5%		
Grenada	65	11.9%		
Honduras	753	26.4%		
Indonesia	294	0.0%		
Madagascar	2'133	26.3%		
Mexico	19'382	31.9%	19'382	
Nicaragua	3'666	57.8%	1'521	2'146
Nigeria	4'754	0.4%	4'754	
Papua New Guinea	31	0.0%		
Peru	13'532	16.1%	13'532	
Sao Tome and Principe	3'748	21.5%		
Togo	1'096	0.8%		
Uganda	3'750	7.3%		
United Republic of Tanzania	3'919	36.3%	3'919	
Total	205'419	2.1%	168'831	16'018

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.
Blank cells: No data available.

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

› Coffee

Almost 700'000 hectares of coffee were grown organically in 2012. This constitutes 6.6 percent of the world's harvested coffee area of 10.5 million hectares in 2011 according to FAOSTAT.

The world's leading producers are Brazil (2.1 million hectares), Indonesia (1.2 million hectares), Colombia and Mexico (each with almost 0.7 million hectares), and Vietnam (0.5 million hectares). Data on the organic production were available for all of these countries with the exception of Brazil.

In organic farming, the largest areas are in Mexico (243'000 hectares), Ethiopia (147'000 hectares) and Peru (98'000 hectares). Bolivia has the highest share with 47 percent of organic coffee, followed by Nepal: (46 percent), Timor-Leste (45 percent), and Mexico (35 percent). Some of these high percentages must be attributed to the fact the coffee is grown more extensively in organic agriculture and often in association with other crops.

The organic coffee area has more than trebled since 2004.

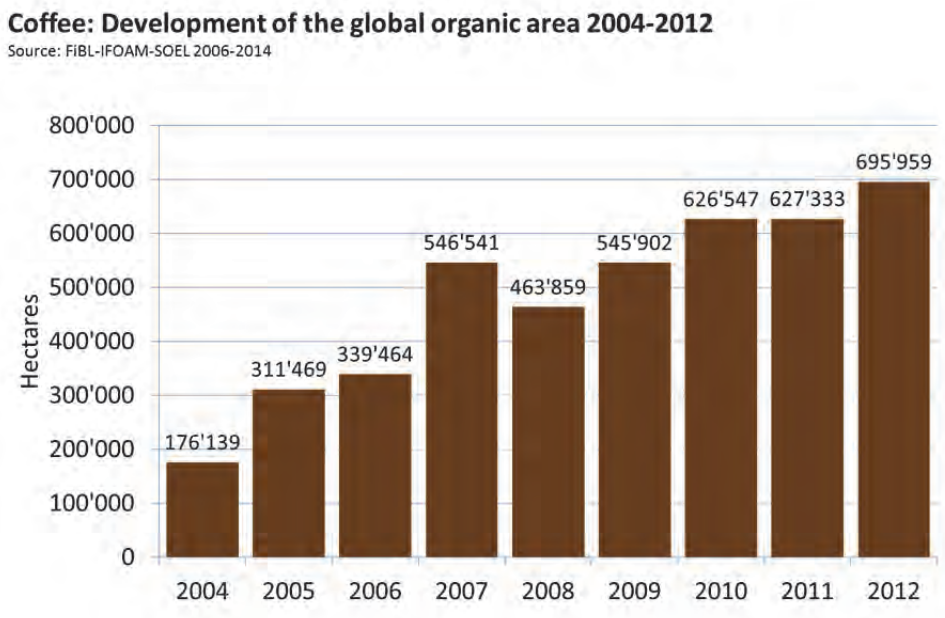


Figure 33: Coffee: Development of organic area 2004-2012

Source: FiBL-IFOAM-SOEL surveys 2006-2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Table 26: Organic coffee area 2012

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Angola	1'738	5.8%	1'738	
Bolivia	13'715	46.5%	11'820	1'895
Cameroon	99	0.0%		
Colombia	9'580	1.3%	9'580	
Costa Rica	707	0.7%		
Cuba	1	0.0%	1	
Dominican Republic	14'956	11.2%	14'156	800
Ecuador	2'834	2.9%	2'834	28
El Salvador	3'639	2.6%	3'617	22
Ethiopia	147'214	29.5%	147'214	
Guatemala	8'425	3.4%	6'925	1'500
Haiti	102	0.1%	102	
Honduras	23'500	8.9%		
Indonesia	29'158	2.3%		
Jamaica	7	0.1%		
Kenya	240	0.2%	120	120
Lao (PDR)	4'301	7.9%		
Madagascar	1'102	0.7%		
Mexico	242'603	35.3%	242'603	
Nepal	804	45.9%	804	
Nicaragua	12'257	10.1%	10'433	1'824
Panama	234	0.8%		
Papua New Guinea	11'249	18.6%		
Peru	98'475	26.8%	98'475	
Rwanda	82	0.2%		
Sao Tome and Principe	244	98.8%		
Thailand	180	0.3%	180	
Timor-Leste	24'690	45.4%		
Uganda	17'721	5.5%		
United Republic of Tanzania	26'104	22.4%	6'333	19'771
Total	695'959	6.6%	556'934	25'960

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.
Blank cells: No data available.

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

› Fruit: Temperate fruit

The total area under organic temperate fruit production recorded here (over 150'000 hectares), is 1.3 percent of the total area of temperate fruit grown in the world (11.7 million hectares in 2011 according to FAOSTAT).

Of the six most important temperate fruit growing countries in the world (China, India, Turkey, Iran, the United States, and Russia) only three (Iran, Turkey, and Serbia), provided data on area of organic temperate fruits in 2012. It can therefore be assumed that the organic temperate fruit area is higher.

The countries with the largest organic temperate fruit areas are Poland (42'000 hectares), Italy, and the United States (both with 18'000 hectares), Turkey (12'000 hectares), and France (10'000 hectares). The highest proportions are in the Czech Republic (34.1 percent), Poland (15.6 percent), Germany (14.4 percent), and Latvia (14.3 percent) (see Table 28).

Since 2004, when data on land use and crops were collected for the first time (almost 60'000 hectares), the temperate fruit area has more than doubled. However, some of the increase must be attributed to continually improving availability of crop data.

The key temperate fruits are apples, with half of the temperate fruit area, followed by plums, apricots, cherries and pears (Table 27). Poland has 44 percent of the total organic apple area.

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

Table 27: Organic temperate fruit by crop 2012

Main crop	Area [ha]
Apples	80'148
Apricots	10'364
Cherries	10'355
Fruit, temperate, no details	19'651
Fruit, temperate, other	10'188
Nectarines	834
Peaches	4'397
Peaches and nectarines, no details	1'624
Pears	8'098
Plums	10'566
Quinces	15
Stone fruit, no details	529
Total	**156'768**

Source: FiBL-IFOAM survey 2014

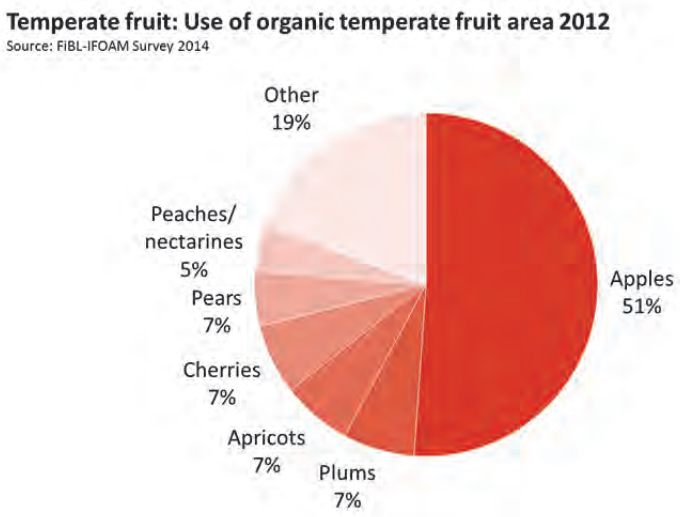


Figure 34: Temperate fruit: Distribution by crop 2012
Source: FiBL-IFOAM survey 2014

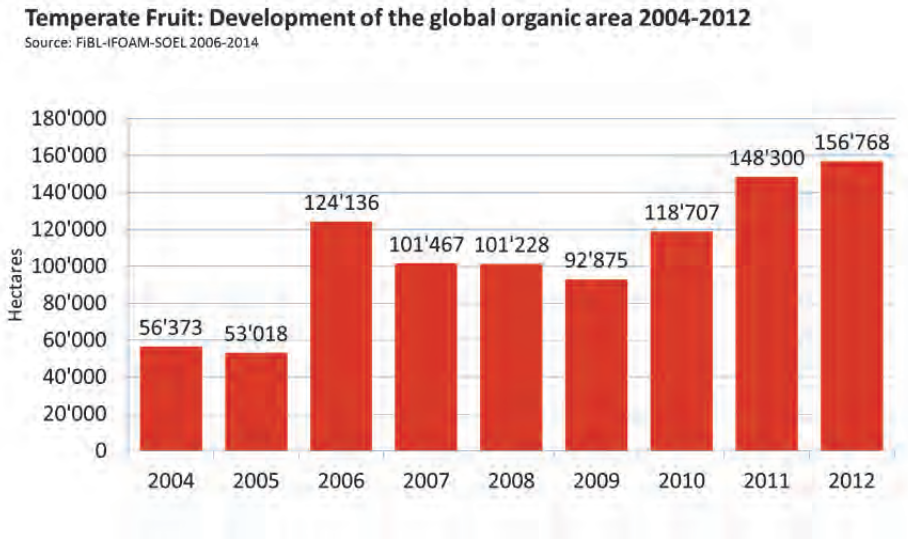


Figure 35: Temperate fruit: Development 2004-2012
Source: FiBL-IFOAM-SOEL surveys 2006-2014

Table 28: Organic temperate fruit 2012

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	4'717	4.0%		
Australia	793	1.3%		
Austria	1'915	6.4%		
Azerbaijan	698	1.5%	131	567
Belgium	450	2.5%	339	111
Bolivia	11	0.1%	11	
Bosnia and Herzegovina	2	0.0%	2	
Bulgaria	2'155	4.3%	566	1'588
Canada	1'130	5.1%		
Chile	1'346	1.4%		
China	4'000	0.1%		
Croatia	940	4.2%	326	614
Cyprus	66	2.8%	59	7
Czech Republic	5'684	34.1%	2'741	2'943
Denmark	335	7.2%	285	50
Ecuador	1	0.0%		1
Estonia	507	12.5%	341	166
Finland	88	12.6%	88	
France	9'964	9.5%	6'126	3'838
Georgia	942	3.5%	931	11
Germany	6'800	14.4%		
Greece	734	0.9%	513	221
Hungary	1'626	2.3%	1'047	579
Iran (Islamic Republic of)	173	0.0%	168	5
Israel	78	0.8%	70	8
Italy	17'893	7.1%	12'702	5'192
Jordan	325	4.9%		
Latvia	542	14.3%	327	104
Lebanon	148	0.5%	148	
Lesotho	617	-	617	
Liechtenstein	1	-		1
Lithuania	1'197	7.2%	703	162
Madagascar	5	0.1%		
Malta	0.4	0.1%	0.1	0.3
Mexico	108	0.1%	108	
Moldova	1'326	-		
Netherlands	363	2.1%		
New Zealand	477	4.0%		
Norway	199	9.1%	177	22

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Oman	4	-	4	
Peru	768	4.2%	692	
Poland	41'990	15.6%	18'538	23'452
Republic of Korea	1'676	2.5%		
Romania	4'668	3.4%	648	4'020
Russian Federation	1	0.0%	1	
Serbia	1'416	0.5%		
Slovakia	758	8.5%	710	48
Slovenia	128	1.9%	87	41
South Africa	703	1.2%	246	356
Spain	3'239	1.6%	2'546	693
Sweden	42	2.7%	38	4
Switzerland	530	8.1%		
Macedonia (FYROM)	164	0.7%	20	144
Tunisia	242	0.3%	242	
Turkey	11'835	3.3%	6'541	5'294
Ukraine	400	0.2%		
United Kingdom	1'703	9.1%	1'622	80
United States of America	18'147	6.0%		
Total	**156'768**	**1.3%**	**60'459**	**50'322**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.
Blank cells: No data available.

› Fruit: Tropical and subtropical fruit

The total area under organic tropical and subtropical fruit production recorded here (209'000 hectares) is 0.9 percent of the total area of tropical and subtropical fruit grown in the world (23.6 million hectares in 2011 according to FAOSTAT data).

Of the five most important tropical and subtropical fruit growing countries in the world (India, China, Uganda, Brazil, and the Philippines, all with more than one million hectares), only the Philippines provided data on the area under organic tropical and subtropical fruit grown in 2012.

The largest organic growers for which data on the organic area were available (Mexico, Dominican Republic, Philippines, Ecuador, and Turkey) all have more than 10'000 hectares. Mexico, the Dominican Republic, and Turkey also have very high proportions, with more than eight percent of their country's total. In the case of the Dominican Republic, this is mainly due to a high share of bananas; and in the case of Mexico for mangoes and avocados. The largest proportions of organic tropical and subtropical fruit area are in the Dominican Republic (25.5 percent), France (19.9 percent; mainly kiwis), and Panama (18.5 percent). By area, the key tropical and subtropical fruits are bananas, avocados, and mangos (Figure 36).

Since 2004, when data on land use and crops were collected for the first time, the tropical fruit area has fivefold (Figure 37). However, some of the increase must be attributed to the continually improving data availability.

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

Table 29: Organic tropical and subtropical fruit 2012

Main crop	Area [ha]
Avocados	44'568
Bananas	78'831
Camu camu	140
Cape gooseberry	53
Carobs	2'191
Cashew apples	907
Dates	4'765
Figs	16'472
Fruit, tropical and subtropical, no details	22'349
Fruit, tropical and subtropical, other	3'792
Guava	68
Kiwis	4'706
Litchi	646
Mangos	21'184
Noni	306
Opuntia	2'680
Papayas	1'302
Passion fruit	174
Persimmons	184
Pineapples	3'727
Pitaya	0.3
Pomegranate	924
Total	209'969

Source: FiBL-IFOAM survey 2014

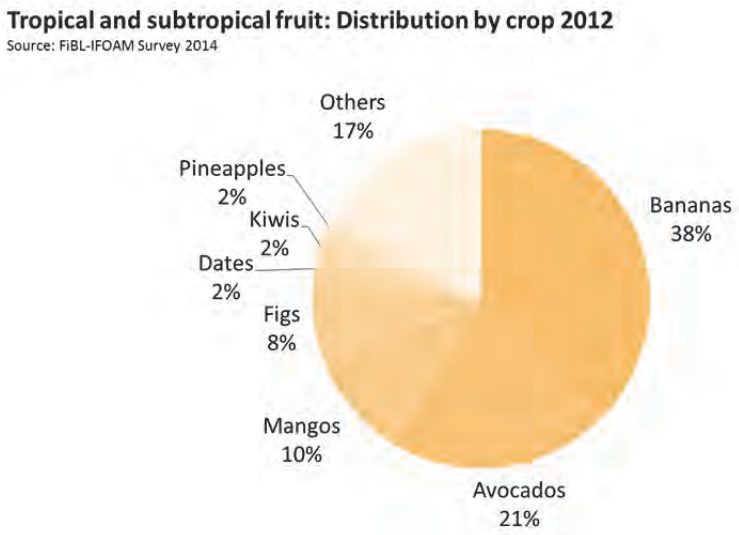


Figure 36: Tropical and subtropical fruit: Distribution by crop 2012

Source: FiBL-IFOAM survey 2014

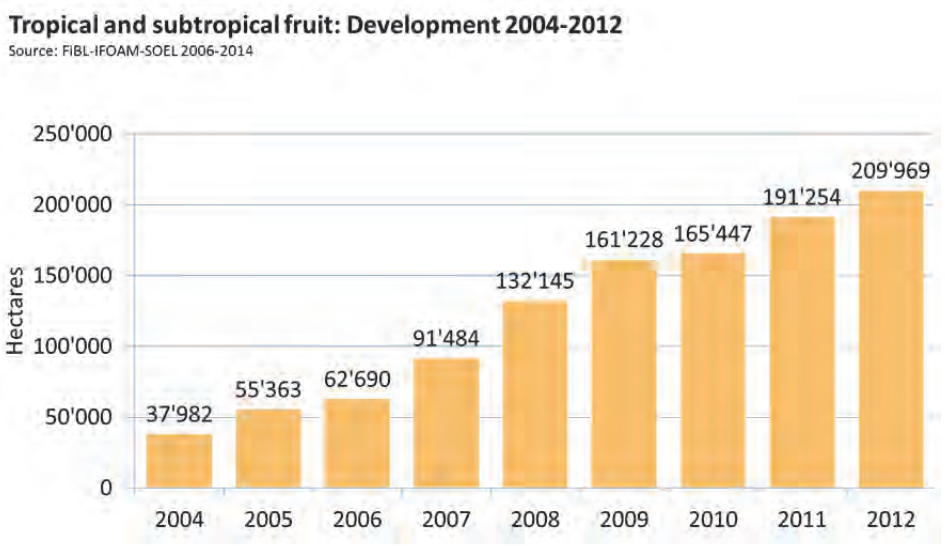


Figure 37: Tropical and subtropical fruit: Development 2004-2012
Source: FiBL-IFOAM-SOEL surveys 2006-2014

Table 30: Organic tropical and subtropical fruit 2012

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Algeria	196	0.1%		
Argentina	10	0.1%		
Australia	228	0.7%		
Azerbaijan	385	4.1%	180	205
Bangladesh	10	0.0%		
Benin	50	0.5%	50	
Bolivia	394	0.6%	271	123
Bosnia and Herzegovina	0.1	0.0%	0.1	
Bulgaria	0.01	0.1%	0.01	
Burkina Faso	2'378	15.6%	100	
Burundi	550	0.1%		
Cambodia	128	0.3%	110	18
Cameroon	135	0.0%		
Canada	1	18.1%		
Chile	883	1.9%		
Colombia	8'322	1.5%	8'322	
Cook Islands	20	17.5%	20	
Costa Rica	7'568	7.0%		
Côte d'Ivoire	439	0.1%	439	
Croatia	22	2.3%	4	17
Cuba	1'381	1.0%	1'178	203
Dominican Republic	29'201	25.5%	25'401	3'800
Ecuador	11'836	3.4%	11'135	700
El Salvador	1'164	4.6%	1'164	

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Fiji	122	10.3%	122	
France	875	19.9%	657	217
French Polynesia	85	15.8%	85	
Georgia	29	-	1	28
Ghana	686	0.2%	213	132
Grenada	19	1.3%		
Guatemala	35	0.0%	35	
Haiti	33	0.0%		33
Indonesia	354	0.1%		
Iran (Islamic Republic of)	8'928	4.9%	8'148	780
Israel	832	3.5%	795	37
Italy	4'817	12.3%	3'703	1'114
Jamaica	2	0.0%		
Jordan	368	8.8%		
Kenya	1'621	1.0%	1'500	121
Madagascar	1'250	0.6%		
Mali	53	0.1%		
Malta	1	2.6%	1	1
Mauritius	2	0.2%		
Mexico	57'266	12.2%	57'266	
Morocco	2'000	1.4%	2'000	
Mozambique	2'002	3.1%	2'002	
Myanmar	39	0.1%	39	
Pakistan	878	0.2%		
Panama	4'308	18.5%		
Peru	6'514	2.7%	5'874	
Philippines	25'300	2.3%	20'415	
Rwanda	2'000	0.5%		
Senegal	383	1.9%	127	125
South Africa	1'725	4.4%	1'165	304
Sudan	140	-		
Macedonia (FYROM)	3	7.6%	2	1
Togo	294	14.3%		
Tunisia	3'895	4.9%	3'895	
Turkey	10'672	8.6%	4'996	5'676
United Republic of Tanzania	422	0.0%		422
United States of America	6'716	17.0%		
Total	**209'969**	**0.9%**	**161'417**	**14'057**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.
Blank cells: No data available.

› Grapes

Over 280'000 hectares of organic grapes are grown, which constitutes 4 percent of the world's grape growing area (7 million hectares in 2011 according to FAOSTAT). In Europe 240'000 hectares (6.1 percent) of the harvested grape area is organic.

Not all of the grape area listed in the table is used for wine making. The production of table grapes and raisins is important in many countries, for example, Turkey. All of the five most important grape growing countries in the world (Spain, France, Italy, China, and Turkey) provided data on the area under organic grapes in 2012.

The countries with the largest organic grape areas are Spain, France, and Italy; each of with more than 55'000 hectares of organic grapes. Some of the highest shares are also in these countries (Table 31).

Since 2004, when data on land use and crops were collected for the first time, the organic grape area has more than tripled. However, some of the increase must be attributed to continually improving availability of crop data.

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

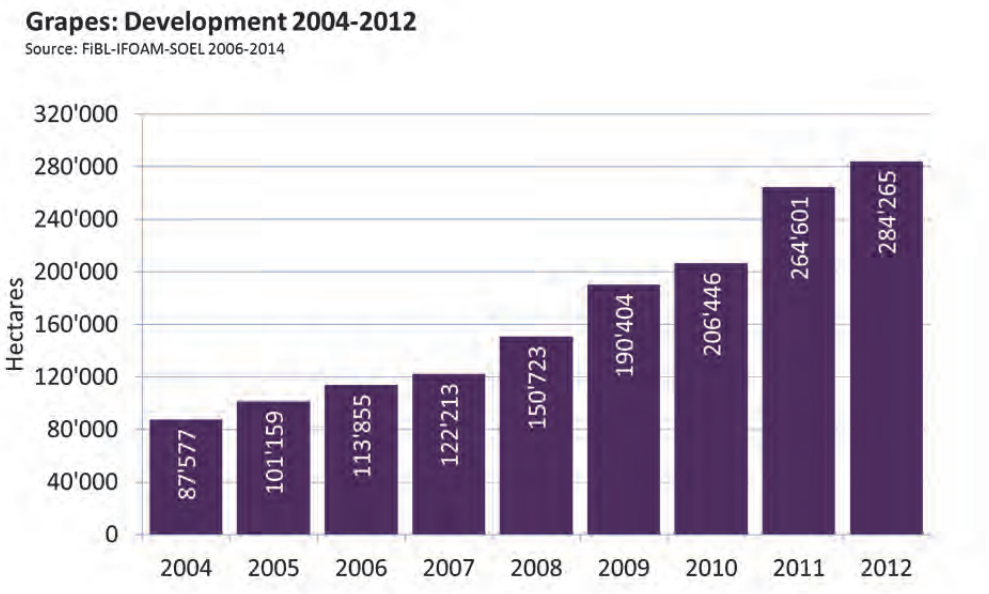


Figure 38: Organic grape area: Development 2004-2012
Source: FiBL-IFOAM-SOEL surveys 2006-2014

Table 31: Organic grape area 2012

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	14	0.2%	8	6
Algeria	205	0.3%		
Argentina	5'359	2.5%		
Australia	282	0.2%		
Austria	4'259	9.7%		
Azerbaijan	41	0.3%	1	40
Belgium	8	81.6%	1	7
Bosnia and Herzegovina	8	0.2%	8	
Bulgaria	2'058	2.6%	546	1'512
Canada	262	2.5%		
Chile	4'592	2.3%		
China	2'000	0.3%		
Croatia	634	2.0%	222	412
Cyprus	222	2.7%	195	27
Czech Republic	978	6.1%	442	536
Denmark	12	.	10	2
Estonia	2	.	0	1
Finland	1	.	1	
France	64'801	8.5%	40'449	24'351
Georgia	119	0.2%	39	80
Germany	7'400	7.4%		
Greece	4'997	4.8%	3'822	1'175
Hungary	1'206	1.6%	856	350
Indonesia	5	.		
Iran (Islamic Republic of)	5'846	2.6%	5'823	23
Israel	72	0.9%	65	7
Italy	57'347	7.9%	36'937	20'410
Jordan	358	9.1%		
Kazakhstan	20	0.2%	20	
Lebanon	83	0.8%	83	
Liechtenstein	2	.	2	
Luxembourg	22	1.8%		
Malta	5	0.3%	2	3
Mexico	4'290	15.8%	4'290	
Moldova	4'641	.		
Morocco	33	0.1%	33	
Netherlands	20	10.1%		
New Zealand	2'500	7.3%		
Poland	35	.	21	14
Portugal	2'523	1.4%		
Romania	1'649	0.9%	762	887
Slovakia	68	0.7%	53	15
Slovenia	324	2.0%	159	165
South Africa	773	0.7%	40	29
Spain	81'262	8.4%	49'365	31'897
Switzerland	372	2.5%		
Macedonia (FYROM)	127	0.6%		
Tunisia	7	0.0%	7	
Turkey	6'571	1.4%	3'634	2'938
Ukraine	90	0.1%		
United Kingdom	73	11.4%	50	23
United States of America	15'647	4.0%		
Uruguay	40	0.5%	40	
Total	284'265	4.0%	147'985	84'911

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.
Blank cells: Not data

› Olives

More than 576'000 hectares of olives were reported to be under organic production in 2012. This is approximately 5.7 percent of the world's total harvested olive area (10 million hectares).

The main countries in which olives are grown are the countries around the Mediterranean. Spain is by far the largest grower with 2.5 million hectares, followed by Tunisia (1.8 million hectares), and Italy (1.1 million hectares). Morocco with 0.9 million hectares and Greece with 0.85 million hectares are also important producers. For all these countries, data for the organic area are available. Spain has the largest area of organic olives (almost 170'000 hectares), followed by Italy (almost 165'000 hectares), and Tunisia (100'000 hectares).

In Italy, the percentage of area under organic production is relatively high (14 percent). In Spain, almost 7 percent of the olive area is organic and in Tunisia 5.6 percent. France has the highest share of organic olives area, with 24.5 percent of all olives being organic.

Since 2004, when data on land use and crops were collected for the first time, the olive area increased by 80 percent. However, some of the increase must be attributed to continually improving availability of crop data.

The available data indicate that a large part of the total olive area (almost 60 percent) is in-conversion. If this is indicative, a considerable increase in supply of organic grapes may be expected.

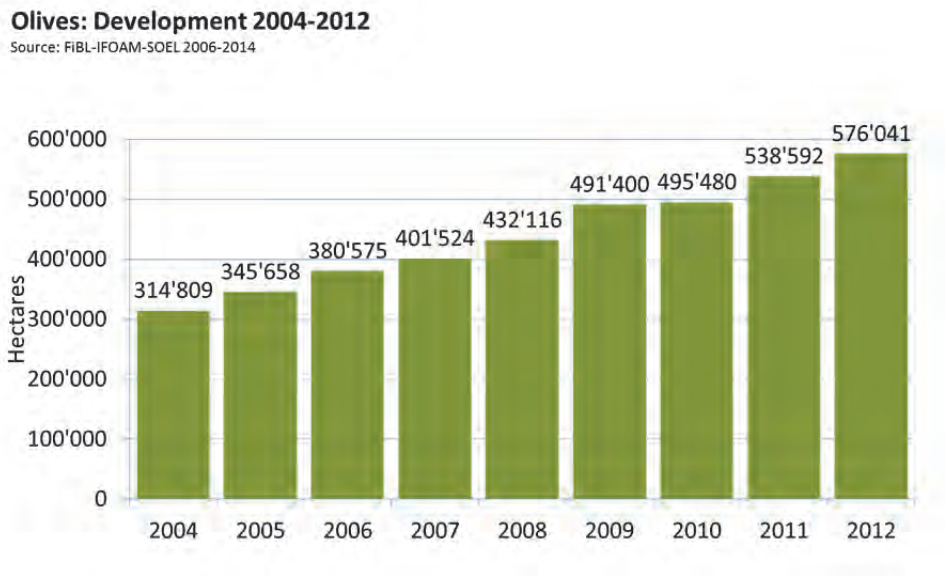


Figure 39: Organic olive area: Development 2004-2012

Source: FiBL-IFOAM-SOEL surveys 2006-2014 based on national data sources and certifier data. For detailed data sources see annex, page 286.

Table 32: Organic olive area 2012

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	198	0.5%	182	16
Argentina	3'802	6.1%		
Australia	470	1.2%		
Azerbaijan	13	0.7%	5	8
Bosnia and Herzegovina	0.1	0.1%	0.1	
Chile	892	5.9%		
Croatia	861	5.0%	203	658
Cyprus	1'134	10.1%	950	184
France	4'155	24.5%	2'205	1'950
Greece	62'702	7.4%	40'684	22'018
Iran (Islamic Republic of)	140	0.5%	140	
Israel	246	1.1%	191	55
Italy	164'488	14.4%	117'553	46'935
Jordan	1'516	2.4%		
Lebanon	337	0.6%	337	
Malta	5	63.8%	5	1
Morocco	11'200	1.2%	1'200	10'000
Peru	95	0.7%	89	
Portugal	18'345	5.3%		
Slovenia	184	20.6%	60	124
South Africa	27	.	18	4
Spain	168'039	6.7%	108'445	59'594
Macedonia (FYROM)	1	0.0%	1	
Tunisia	100'505	5.6%	100'505	
Turkey	36'262	4.6%	9'689	26'573
Uruguay	425	15.6%	425	
Total	**576'041**	**5.7%**	**382'886**	**168'119**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.
Blank cells: No data available.

› Oilseeds

An area of more than 640'000 hectares was reported to be used for growing organic oilseeds in 2012. This is approximately 0.3 percent of the world's total harvested oilseed area (more than 204 million hectares).

The main countries in which oilseeds are grown are the United States, India, Brazil, and China (each with more than 20 million hectares). The United States (31 million hectares) is by far the largest grower. However, of these countries, data on the organic area were only available for the United States and China.

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

The highest shares are in Peru (soybeans and peanuts), El Salvador (sesame), Austria (soya and sunflower seed), Israel (jojoba), and Kazakhstan (rapeseed and linseed).

Since 2004, when data on land use and crops were collected for the first time, the oilseed area (2004: 140'000 hectares) has more than quadrupled. However, some of the increase must be attributed to continually improving availability of crop data.

Over forty percent of the organic oilseed area is for soybeans, and another twenty percent is for sunflower seeds (Figure 41).

The data available for a breakdown of the total fully converted and in-conversion area shows that, if the relative figures are indicative of the proportions of the total area, approximately 26 percent is in-conversion, and will be fully converted in the next few years. This has implications for the availability of organic oilseeds in the near future.

Table 33: Organic oilseeds 2011

Main crop	Area [ha]
Jojoba	465
Linseed (oil flax)	63'713
Mustard	3'011
Oilseeds, no details	12'150
Oilseeds, other	10'752
Peanuts	6'569
Pumpkin seeds	238
Rape and turnip rape	72'880
Sacha inchi	295
Safflower	4'800
Sesame	65'399
Soya	274'042
Sunflower seed	128'791
Total	643'104

Source: FiBL-IFOAM 2013

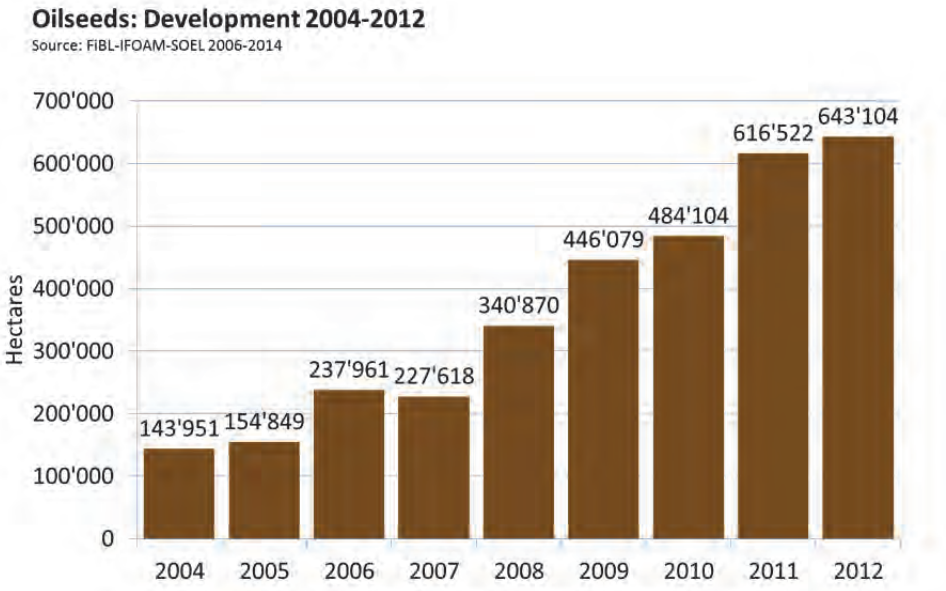


Figure 40: Organic oilseed area: Development 2004-2012
Source: FiBL-IFOAM-SOEL surveys 2006-2014

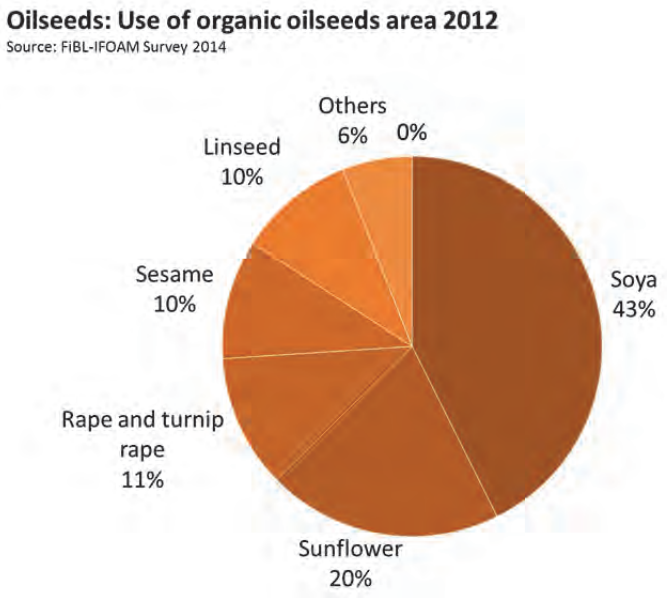


Figure 41: Organic oilseed area: Use of oilseed area by crop 2012
Source: FiBL-IFOAM survey 2014

Table 34: Organic oilseeds area 2011

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	16'121	0.1%		
Australia	217	0.0%		
Austria	14'586	9.8%		
Azerbaijan	126	0.6%	50	76
Belgium	68	0.3%	23	45
Benin	316	0.2%	316	
Bolivia	8'821	0.7%	8'047	774
Bosnia and Herzegovina	2	0.0%		2
Bulgaria	3'292	0.3%	816	2'476
Burkina Faso	5'040	0.9%		
Canada	48'253	0.5%		
Chile	3	0.0%		
China	150'000	0.7%		
Croatia	2'074	1.9%	805	1'269
Czech Republic	2'319	0.5%	858	1'462
Denmark	304	0.2%	243	61
Ecuador	551	0.8%	551	
El Salvador	839	15.0%	839	
Estonia	3'064	3.4%	2'465	600
Ethiopia	17'563	2.2%	14'444	3'119
Finland	2'921	3.2%	2'921	
France	27'098	1.1%	22'027	5'071
Germany	8'200	0.6%		
Greece	1'948	2.9%	1'322	626
Guatemala	342	0.7%		342
Hungary	8'467	1.0%	8'100	367
Israel	430	6.2%	430	0
Italy	8'760	2.9%	7'772	988
Kazakhstan	82'493	5.6%	66'227	16'266
Kyrgyzstan	16	0.0%	16	
Latvia	877	0.7%	608	269
Lithuania	5'513	2.1%	3'049	2'464
Luxembourg	4	0.1%		
Madagascar	2'500	4.1%		
Mali	10'735	2.9%		
Mexico	2'265	0.6%	2'265	
Mozambique	767	0.1%	767	
Nepal	122	0.0%		122
Netherlands	33	0.7%		
Nicaragua	2'500	5.3%	2'500	
Nigeria	202	0.0%		

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Norway	34	0.7%	34	
Paraguay	4'000	0.1%	4'000	
Peru	1'442	21.2%	1'419	
Poland	1'573	0.2%	474	1'099
Romania	43'923	3.0%	26'907	17'016
Russian Federation	985	0.0%	128	857
Senegal	1'385	0.2%	1'315	70
Slovakia	2'533	1.0%	2'029	504
Slovenia	249	4.7%	184	65
South Africa	268	0.0%	268	
Spain	9'820	1.1%	7'418	2'402
Sudan	17'510	-	2'300	10'000
Sweden	3'395	3.0%	3'027	368
Switzerland	351	1.3%		
Macedonia (FYROM)	159	2.0%	73	86
Togo	2'484	3.3%		
Turkey	2'154	0.3%	1'240	914
Ukraine	38'530	0.6%		
United Kingdom	268	0.0%	268	
United Republic of Tanzania	455	0.0%		455
United States of America	71'636	0.2%		
Uruguay	200	0.0%	200	
Total	**643'104**	**0.3%**	**198'741**	**70'235**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.
Blank cells: no data.

.

› Protein crops

The total area under organic protein crops is almost 320'000 hectares, which is 0.4 percent of the total area of protein crops grown in the world (71 million hectares in 2011 according to FAOSTAT).

No current data on the organic area were available from the three most important protein crop growing countries in the world: India, Niger, and Myanmar; India (28 million hectares) was by far the largest grower.

The countries with the largest organic protein crop areas are Spain, France, Canada, Lithuania, and Germany. Lithuania has the highest share of protein crop organic area with almost 61 percent. The overall shares have a tendency to be high as protein crops play an important role in organic farming.

The protein crop area has quadrupled from 78'000 to 320'000 hectares since 2004, when data on land use and crops were collected for the first time. However, some of the increase must be attributed to continually improving availability of crop data.

Unfortunately, for protein crops a breakdown for individual crops is not available for many countries. For instance, Eurostat - the statistical office of the European Union - communicates only one figure for "dried pulses".

The data available for a breakdown of the total fully converted and in-conversion area shows that at least t18 percent is in conversion, and will be fully converted in the next few years. This has implications for the availability of organic protein crops in the near future.

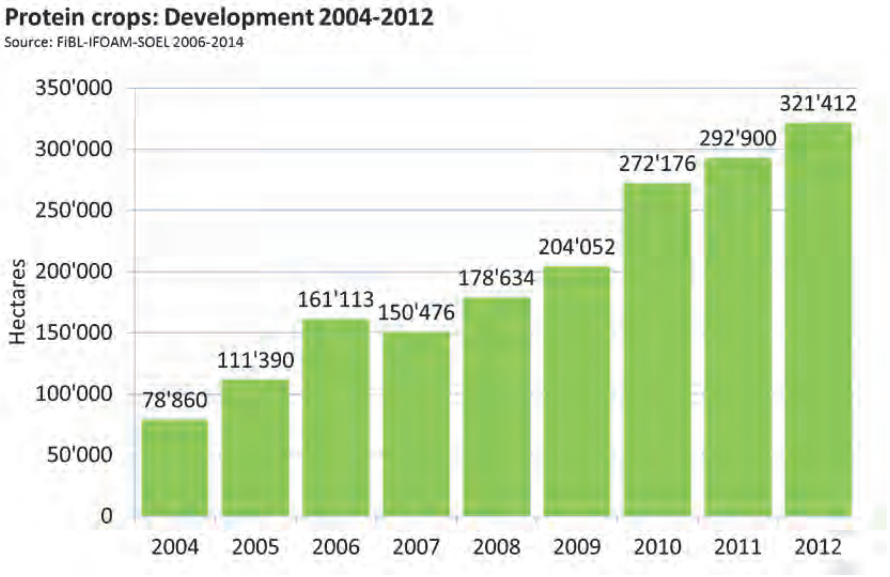


Figure 42: Organic protein crop area: Development 2004-2012

Source: FiBL-IFOAM-SOEL surveys 2006-2014

Table 35: Organic protein crop area 2012

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	48	0.0%		
Australia	18	0.0%		
Austria	12'459	58.6%		
Azerbaijan	6	0.0%	2	4
Belgium	2'599	-	2'063	536
Bulgaria	48	0.9%	47	1
Canada	32'129	1.6%		
Croatia	23	1.4%		23
Czech Republic	1'845	7.7%	1'321	524
Denmark	3'046	39.1%	2'173	873
Ecuador	191	0.2%	191	
Estonia	1'917	22.4%	1'349	568
Finland	8'145	56.2%	8'145	
France	45'069	15.0%	36'264	8'805
Germany	22'200	22.5%		
Greece	3'727	24.3%	3'255	472
Hungary	2'417	12.5%	2'248	169
Israel	34	0.4%	34	
Italy	20'837	29.6%	17'930	2'907
Kazakhstan	18'399	17.6%	14'099	4'300
Kyrgyzstan	194	0.4%	81	113
Latvia	3'299	-	2'818	481
Lithuania	26'486	61.0%	21'809	4'677
Luxembourg	74	23.7%		
Madagascar	59	0.0%		
Moldova	4'641	-		
Netherlands	83	3.6%		
Norway	161	7.3%	157	4
Peru	3	0.0%	3	
Poland	5'698	3.7%	4'370	1'328
Romania	2'764	5.2%	2'215	549
Russian Federation	457	0.0%	298	159
Rwanda	1'400	0.4%		
Senegal	217	0.2%		217
Slovakia	246	3.0%	174	72
South Africa	236	0.4%		236
Spain	45'195	12.6%	39'443	5'752
Sweden	9'761	30.0%	8'366	1'395
Switzerland	453	11.7%		
Tunisia	37	0.0%	37	
Turkey	9'355	1.2%	5'339	4'016
Ukraine	9'920	3.2%		
United Kingdom	1'335	0.8%	1'315	20
United States of America	18'835	2.3%		
Total	**316'066**	**0.4%**	**175'545**	**38'201**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.
Blank cells: No data available.

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

› Vegetables

The total area under organic vegetables production (245'000 hectares) is 0.4 percent of the total area of vegetables grown in the world (almost 60 million hectares in 2011 according to FAOSTAT).

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

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

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

Since 2004, when data on organic land use and crops were collected for the first time, the vegetable area has more than double from 100'000 to the current 244'000 hectares. However, some of the increase must be attributed to continually improving availability of crop data.

Unfortunately, for vegetables, a breakdown for individual vegetable groups is available for only half of the organic vegetable area. A large part (31'000 hectares) is for pulses (fresh beans and peas), followed by root tubers and leafy and stalked vegetables (salads).

The data available for a breakdown of the fully converted and in-conversion area shows that more than three-quarters of the total organic vegetable area is fully converted. If the relative figures are indicative of the proportions of the total area, less than 25 percent is in-conversion, and will be fully converted in the next few years, implying that there will probably not be an increase of the organic vegetable area.

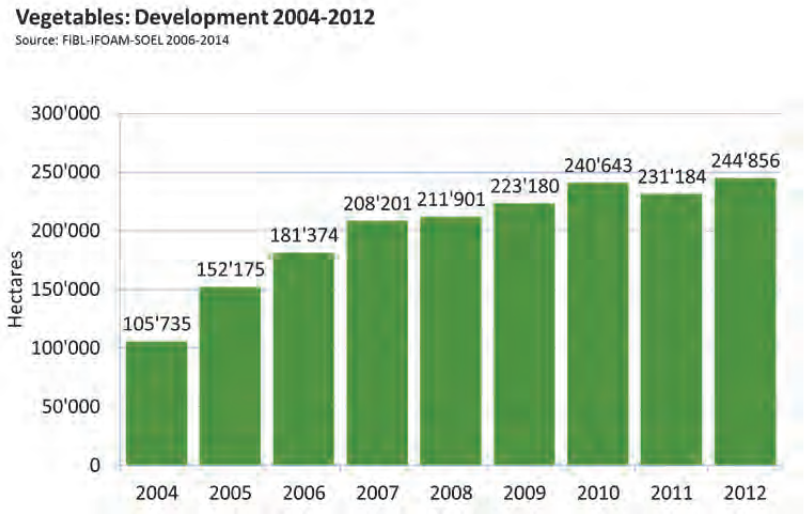


Figure 43: Organic vegetable area: Development 2004-2012

Source: FiBL-IFOAM-SOEL surveys 2006-2014

Table 36: Organic vegetable area 2012

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under Conversion [ha]
Albania	3	0.0%	3	0
Argentina	1'313	0.7%		
Australia	1'388	2.2%		
Austria	2'254	16.3%		
Azerbaijan	192	0.2%	57	135
Bangladesh	157	0.0%		
Belgium	788	1.3%	733	56
Bolivia	265	0.3%	265	
Bosnia and Herzegovina	4	0.0%	1	3
Bulgaria	1'308	4.6%	701	607
Burkina Faso	4	0.0%		
Cambodia	23	0.0%	7	16
Canada	2'854	4.7%		
Chile	132	0.2%		
Colombia	82	0.1%	82	
Costa Rica	210	1.5%		
Croatia	157	1.3%	73	84
Cyprus	50	1.9%	31	19
Czech Republic	739	5.2%	664	74
Denmark	1'965	21.8%	1'959	6
Dominican Republic	120	0.4%	120	
Ecuador	414	0.2%	414	0
El Salvador	34	0.6%	34	
Estonia	110	4.2%	92	18
Finland	230	2.9%	230	
France	13'600	6.2%	12'550	1'050
French Guiana (France)	19	1.6%	17	2
Georgia	5	0.0%		5
Germany	10'574	10.7%		
Ghana	79	0.1%	5	
Greece	1'513	1.5%	1'260	253
Guadeloupe (France)	4	0.1%	4	
Guatemala	565	0.7%	485	80
Hungary	1'818	3.7%	1'773	45
Indonesia	176	0.0%		
Iran (Islamic Republic of)	35	0.0%	35	
Ireland	274	5.7%	254	20
Israel	1'175	2.1%	1'171	4
Italy	21'156	4.3%	17'728	3'428
Jamaica	241	1.5%		
Japan	4'866	1.4%	4'866	

Statistics: Crops - Vegetables

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under Conversion [ha]
Jordan	9	0.0%		
Kenya	172	0.1%	146	26
Kyrgyzstan	44	0.1%	28	16
Lao (PDR)	518	0.3%	18	500
Latvia	116	1.6%	91	25
Lebanon	76	0.2%	76	
Liechtenstein	3	.	3	
Lithuania	81	0.7%	64	17
Luxembourg	33			
Madagascar	34	0.1%		
Mali	25	0.0%		
Malta	7	0.1%	7	0
Martinique (France)	12	0.6%	10	2
Mauritius	5	0.1%		
Mexico	46'573	7.3%	46'573	
Moldova	221	-		
Morocco	1'003	0.6%	1'003	
Myanmar	23	0.0%	23	
Namibia	56	1.0%	56	
Netherlands	4'931	6.0%	4'267	684
Nicaragua	1	0.0%	1	
Niger	30	0.0%		
Norway	218	5.2%	209	9
Oman	16	0.1%	16	
Panama	5	0.0%		
Peru	1'001	0.6%	45	
Philippines	31	0.0%	31	
Poland	9'379	5.9%	5'933	3'446
Portugal	764	0.9%		
Republic of Korea	3'138	1.1%		
Réunion (France)	72	1.0%	47	25
Romania	893	0.3%	150	743
Russian Federation	81	0.0%	26	55
Saudi Arabia	596	0.6%	574	23
Senegal	922	2.2%	298	624
Serbia	114	0.1%		
Slovakia	722	3.6%	712	10
Slovenia	182	4.4%	134	48
South Africa	1'078	0.9%	869	168
Spain	10'245	3.1%	7'988	2'257
Sudan	4'500	.	3'500	1'000
Sweden	990	5.1%	973	17

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under Conversion [ha]
Switzerland	1'556	11.4%		
Taiwan	1'692	-	1'692	
Thailand	1'141	0.2%		
Macedonia (FYROM)	97	0.2%	31	66
Tunisia	52	0.0%	52	
Turkey	2'005	0.2%	1'352	653
Ukraine	5'328	1.0%		
United Kingdom	10'645	10.3%	10'387	259
United Republic of Tanzania	2'031	0.6%	778	1'253
United States of America	59'669	7.4%		
Uruguay	300	3.9%	300	
Zambia	525	1.0%	225	300
Total	**244'856**	**0.4%**	**134'300**	**18'131**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Data collection on organic agriculture worldwide: Background

For the 15th survey on organic agriculture worldwide, data on organic agriculture were available for 164 countries. Since 1999, when the data collection started, the number of countries included has almost doubled.

Only information on the total organic land and the number of farms was collected for the original global organic survey, but the scope of the survey has expanded considerably in the past years, which has been made possible by funding from the Swiss State Secretariat of Economic Affairs (SECO) and the International Trade Centre (ITC).

Data collection systems and data availability

In general, data availability is improving every year. This is because more and more countries are establishing data collection systems. *Data on land use, crops, production, and operators* are being more widely gathered, either by the private sector or by government organizations, and are mostly based on data of the certifiers.

The availability of *domestic market and international trade data* is also improving. Domestic market data are mostly based on research carried out by market research companies and statistical offices. Import and export data are mainly collected by governments and can be based on the data of certifiers and/or customs but is most commonly based on company data.

Governmental *data collection systems* are often linked to the establishment of regulations about organic agriculture. Once such a regulation is established, there are rules about the registration of certifiers with a national authority. This opens up access to data from the certifiers. Public data collection systems mostly cover the organic area and operators, and also sometimes production and international trade data, but they mostly exclude data on the domestic market.

In most countries, the government collection systems for area, livestock and operator data are based on the data from the certifiers.[1] In the European Union, the new organic farming regulation describes precisely what data should be provided by the competent authorities who collect the data from the certifiers/inspection bodies.[2] The data collected

[1] Other systems include:
Farms that receive direct payments as the basis for the data (Switzerland)
Farm structure survey: Some countries have included the option to identify organic farms in the framework of general farm structure surveys.

[2] Commission Regulation (EC) No 889/2008 of 5 September 2008 laying down detailed rules for the implementation of Council Regulation (EC) No 834/2007 on organic production and labelling of organic products with regard to organic production, labelling and control
Preamble (36), page 4, L 250/4:
"Notifications of information by the Member States to the Commission must enable it to use the information sent directly and as effectively as possible for the management of statistical information and referential data. To achieve this objective, all information to be made available or to be communicated between the Member States and the Commission should be sent electronically or in digital form."
Article 93, page 36 Statistical information, L 250/31:
1. Member States shall provide the Commission with the annual statistical information on organic production referred to in Article 36 of Regulation (EC) No 834/2007 by using the computer system enabling electronic exchanges of documents and information made available by the Commission (Eurostat) before 1 July each year.

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

In many cases, the p*rivate sector collates the data from the certifiers or the organic operators* in the countries. However, the private sector often does not have full access to the data.

Finally, there are *countries that have no data collection system* in place. Collection systems are still underdeveloped, particularly in Africa and in Asia. For these countries, FiBL and IFOAM attempt to get the data from major international certifiers or from contacts in the country, who provide data specifically for the survey. These data are often not complete, or there is a problem with continuity over the years.

Regional initiatives

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

The European Commission stipulates that all EU member states provide data for variables such as area, land use, number of operators and livestock, and production volumes. Eurostat, the statistical office of the European Union, compiles these data, which are accessible on the Eurostat homepage.[1] While most countries have provided these data in the past, the EU regulation that obliges them to do so did not come into force until January 2010. The European-funded research project OrganicDataNetwork[2], which aims to improve collection of market data has recently issued a statement on how to improve data collection. (See page 200).

The Mediterranean Organic Agriculture Network (MOAN): is a network of the authorities in charge of organic farming that was set up by the Mediterranean Agricultural Institute in Bari, Italy, to promote data collection among the network. Regular meetings and support through the Mediterranean Agronomic Institute of Bari (IAMB) have considerably improved the data collection in the Mediterranean area in the past years.

Central America: RUTA, the Regional Unit for Technical Assistance for Sustainable Rural Development in Central America, is now supporting the data collection in this region and data access has improved considerably. There are also plans to publish the data on RUTA's organic farming homepage at www.ruta.org/rediao/.

---

2. The statistical information referred to in paragraph 1 shall comprise, in particular the following data:
(a) the number of organic producers, processors, importers and exporters;
(b) the organic crop production and crop area under conversion and under organic production;
(c) the organic livestock numbers and the organic animal products;
(d) the data on organic industrial production by type of activities.
3. For the transmission of the statistical information referred to in paragraphs 1 and 2, Member States shall use the Single Entry point provided by the Commission (Eurostat).
4. The provisions relating to the characteristics of statistical data and metadata shall be defined within the context of the Community Statistical Programme on the basis of models or questionnaires made available via the system referred to in paragraph 1.

[1] Access via http://epp.eurostat.ec.europa.eu/portal/page/portal/agriculture/data/database

[2] OrganicDataNetwork: Data network for better European organic market information. Information is available at http://ec.europa.eu/research/bioeconomy/agriculture/projects/organicdatanetwork_en.htm

Pacific Islands: In the Pacific Islands, there are currently efforts to better coordinate the organic activities in the region, which also includes the setting up of data collection systems (see also article by Karen Mapusua, page 261).

Next global survey on organic agriculture

The next global organic survey will start in mid-2014. We would be very grateful if data could be sent to us, but we will of course also contact all experts. Should you notice any errors regarding the statistical data in this volume, please let us know; we will then correct the information in our database and provide the corrected data in the 2015 edition of "The World of Organic Agriculture". Corrections will also be posted at www.organic-world.net.

Contact

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

Further reading

Censkowsky, Udo, Ulrich Helberg, Anja Nowack and Mildred Steidle (2007): Overview of Word Production and Marketing of Organic Wild Collected Products. ITC/WTO, Geneva. Available at: www.intracen.org/Organics/documents/World_Production_and_Marketing_of_Organic_Wild_Collected_Products.pdf

Research Institute of Organic Agriculture (FiBL) and International Federation of Organic Agriculture Movements (IFOAM): The World of Organic Agriculture, editions 2000-2014. Available http://www.organic-world.net/yearbook.html

Grolink (2013): Organic Certification Directory 2013. Höje, Sweden. www.organicstandard.com

Willer, Helga and Minou Yussefi (2000): Organic Agriculture World-wide. Statistics and Future Prospects. Bad Dürkheim, Germany

The Global Market for Organic Food & Drink

The Global Market for Organic Food & Drink[1,2]

Amarjit Sahota[3]

Introduction

Healthy growth is continuing in the global market for organic products. Latest research finds international sales of organic food and drink approached US 64 billion in 2012.[4] Positive growth is occurring in all regions, however many challenges lie ahead.

Although organic products are now produced in the four corners of the world, demand is concentrated in two regions. Furthermore, international trade of organic products is hindered by standards. Europe and the US entered a historic trade arrangement for organic foods in 2012; however, other countries/regions remain outside this arrangement. Organic producers in Asia, Latin America and Africa may therefore have to jump through 'multiple organic hoops' to access export markets.

Changing consumer demands is another major challenge. International sales of organic products have grown from almost nothing to over 60 billion US dollars over 30 years. Organic products resonated with consumers as they are produced by a highly ecological form of agriculture. Organic foods also gave assurances to consumers anxious about food origins, production methods and provenance. However, there now are a number of food eco-labels and sustainable production schemes that compete directly with, or indirectly with, organic standards.

Economic stability is another major challenge. Growth in the global market for organic products has slowed since the financial crisis in 2008. Many country markets experienced sluggish growth rates as their economies contracted. Although the global economy has strengthened, some parts of Europe remain mired in recession. Falling income levels and rising unemployment are dampening consumer demand for organic products in such countries.

---

[1] **This chapter has been prepared from the upcoming report 'The Global Market for Organic Food & Drink' (Organic Monitor, expected publication date 2014)'. No part of this chapter maybe reproduced or used in other commercial publications without written consent from Organic Monitor. To request permission, write to: Organic Monitor, 20B The Mall, London W5 2PJ, Tel. +44 20 8567 0788, e-mail postmaster@organicmonitor.com**

[2] Please note that due to differences in the methodology some of the figures presented in this chapter differ from those collected in the framework of the FiBL-IFOAM survey (page 67).

[3] Amarjit Sahota, Organic Monitor, 20B The Mall, London W5 2PJ, Tel. +44 20 8567 0788, postmaster@organicmonitor.com, www.organicmonitor.com
Amarjit Sahota is the president of Organic Monitor, a specialist research, consulting & training firm that focuses on global sustainable product industries. More details are on www.organicmonitor.com

[4] Global market size appears only marginally higher than 2011 because of fluctuations in exchange rate (EUR: USD) and revision of North American market data.

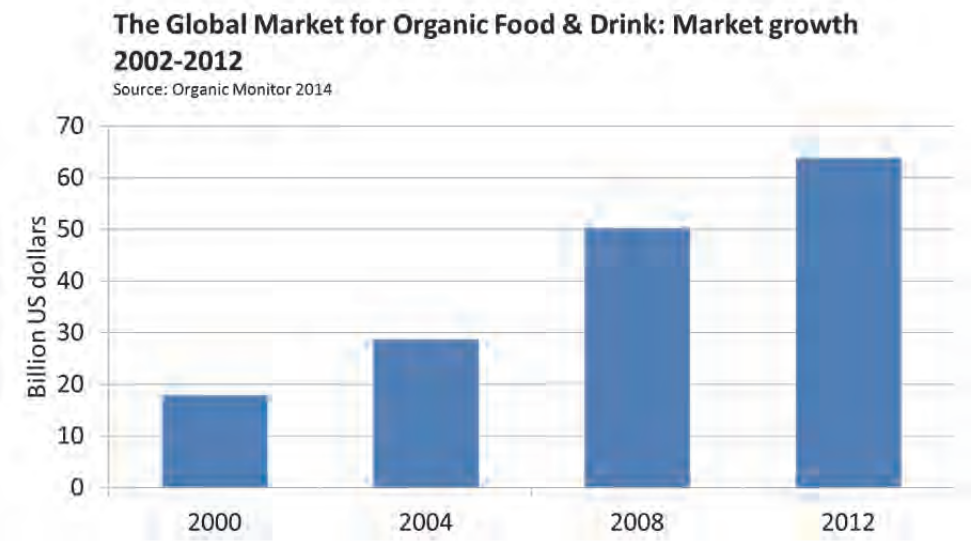


Figure 44: Growth of the global market for organic food & drink, 2000-2012
Source: The Global Market for Organic Food & Drink (Organic Monitor)
Note: All figures are rounded

Global market size appears only marginally higher than 2011 because of fluctuations in exchange rate (EUR: USD) and revision of North American market data.

Europe

Growth rates in the European market have been mixed. Healthy growth has continued in countries, such as Germany, France, the Netherlands and Finland. Some country markets have shown little, if any, growth because of poor economic conditions. Southern European countries in particular, have small markets for organic products that have experienced sluggish growth rates.

The European market for organic products was valued at 29 billion US dollars in 2012. Germany, the economic powerhouse, has the largest market for organic products, comprising almost a third of total sales. Organic products continue to gain market share as products become more accessible in mainstream channels like discounters, supermarkets and drugstores.

Most organic product sales are from northern European countries. Southern countries, such as Spain, Portugal and Greece, are large producers and exporters. Central & Eastern European countries are also becoming important exporters of organic foods. However, internal markets are also developing in countries like Czech Republic, Poland and Hungary.

North America

Valued at 32 billion US dollars, the North American market remains the largest market for organic food & drink in the world. High growth rates have resulted in some sectors to

experience undersupply. Indeed, organic products are coming into the US from all parts of the world to meet the supply shortfall.

Food labelling issues are having a major impact on the North American organic food market. Consumer concerns about genetically modified organisms (GMOs) are a major driver of market growth. Many consumers are buying organic foods, as they want to avoid GM ingredients in their food products. Unlike the EU and most other countries, the US has no mandatory labelling of GM foods and ingredients. In November 2012, an initiative to label GM foods in California was narrowly defeated. The pro-labelling campaign has however pushed food origins and safety high on the consumer agenda, benefiting organic product sales.

A unique characteristic of the North American market is the large number of large multinational-like organic food companies. The region is home to Whole Foods Market (the largest natural & organic food company), SunOpta (the largest organic ingredient firm), Hain Celestial (publicly-listed natural & organic food company) and WhiteWave Foods (owner of several organic food businesses). At the latter part of 2013, WhiteWave Foods acquired the largest organic fresh produce firm Earthbound Farm. These large American organic food companies have already developed a strong presence in Europe, with some planning to venture into other regions.

Other regions

Outside Europe and North America, there is a relatively small market for organic products. It is estimated that the combined market value of organic product sales in Asia, Australasia and other regions was 3 billion US Dollars in 2012.

In many Asian countries, production of organic crops is primarily destined for export markets. Indeed, China, India, Thailand, Indonesia and Sri Lanka have highly export-oriented organic sectors. The rising middle-class and growing consumer awareness of organic production methods are however developing internal markets for organic foods.

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

Latin America is also an important exporter of organic products. Argentina, Peru, Chile, Colombia produce organic primary crops for Europe and North America. Brazil has the largest market for organic food & drink in the region. Indeed, many producers are now focusing on their home market for growth, rather than exports.

Q3: Here are some statements about environmentally-friendly products. Which of the following statement best describes your behaviour towards these products in general
Source: Eurobarometer, December 2012

Figure 45: Consumer behaviour towards environmentally-friendly products
Note: All figures are rounded. Source: Eurobarometer, December 2012

Conclusions & future growth

In this latest report on the global organic food & drink market, it has been shown that positive growth is continuing. The market size appears only slightly higher than 2011 because of fluctuations in exchange rates and a revision of the North American market size. The organic products market in each region showed healthy growth in 2012.

Healthy growth is also envisaged to continue in the coming years. However, if organic product sales are to become more evenly geographically distributed then some major challenges need to be resolved. Apart from the issue of multiple standards, there needs to be more regional markets for organic products. The imbalance in international trade of organic products needs to be addressed. For instance, Asia produces and exports crops like organic rice, soya beans, fruits, and spices to Europe. The same primary crops are used to make finished organic products that are re-exported to Asian markets. Apart from the environmental footprint of such organic products, high transport & logistic costs inflate product prices at the consumer level.

Green consumer behaviour also needs to be addressed. Organic is largely seen as a success story in the international food industry; production occurs in over 120 countries, whilst sales have grown from almost nothing to 64 billion US dollars within 30 years. However, consumer demand needs to broaden.

In December 2012, the EU commissioned a survey in its 27 member states and Croatia to study the consumers' behaviour towards green / environmentally-friendly products. About 26'573 people from diverse social and demographic groups were polled for this study. The research found that 26 percent of Europeans are regular buyers of green products, with another 54 percent occasional buyers. Thus, about 80 percent of

European consumers buy green products, although most sales are from a small share (Figure 45, page 130).

Many studies show that demand for organic products follows the same pattern i.e. a small group of consumers are responsible for the bulk of purchases. This concentration of demand leads to a 'green glass ceiling', which prevents a higher market, share for organic products. If organic products are to take up high market share, say 10% or more of total food sales in a country, demand has to broaden to mainstream consumers. At present, the market share has reached four percent in US and Germany (the largest markets). In Denmark, it has climbed the highest to eight percent.

In conclusion, organic product sales are projected to continue to rise in the coming years. However, if growth rates are to accelerate then demand needs to become less concentrated. Apart from expanding sales outside Europe and North America to other regions, the industry needs to look at expanding the consumer base in individual countries. By breaking through the 'green glass ceiling', organic products can show that they have truly broken out of their niche label.

Reference

Eurobarometer (2012): Attitudes of Europeans towards building the single market for green products. Flash Eurobarometer 367, Brussels. Available: http://ec.europa.eu/public_opinion/flash/fl_367_en.pdf

Standards and Regulations

Standards and Regulations

Beate Huber[1] and Otto Schmid[2]

One of the breakthroughs in 2013 was the adoption of the organic regulation in Ukraine, which was approved by the parliament early 2011, but then vetoed by the president (July 2011). The organic regulation has now been revised to be adopted by the end of 2013, and Ukraine is now working on its implementation. Also, in Russia, the discussion on an organic legislation has been revived but is not yet finalized. No further adoptions of new organic legislation have been reported. The work on the National Organic Program (NOP) of the United States has focused on more guidance for accredited certifiers. The European Union (EU) underwent an intensive review process of their regulation; elements of the review process included an impact assessment, a public online consultation, expert hearings and an evaluation of the regulation by experts.

Organic legislations worldwide: current situation

According to the FiBL survey on organic rules and regulations, the number of countries with organic standards has increased to 88. Twelve countries are in the process of drafting legislation. Data on regulations around the world was collected by various authorities and experts. Categorization of regulations as being "not fully implemented" or "fully implemented" was based directly on the feedback from the persons interviewed, and the information was not subject to verification. We received responses from experts and authorities from the majority of the countries. It is assumed that the non-responding countries did not pass legislation on organic production. It needs to be noted that some countries listed below as having regulations, do not enforce them, i.e. the indication "not fully implemented" relates to countries which have only recently adopted legislation and are still in the process of finalizing its implementation, as well as to countries which have adopted legislation but are not providing the resources necessary to implementation.

The list of countries with regulations, or in the process of drafting regulations on organic agriculture, is shown in Table 37. Please send comments or information on countries that are not listed to Beate Huber (beate.huber@fibl.org).

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

Table 37: Countries with regulations on organic agriculture

Remark: Countries highlighted in blue have standards officially endorsed as organic by the Organic Movement, based on their equivalence with the Common Objectives and Requirements of Organic Standards (viewed on 20.01.2014; Saudi Arabia Organic Regulation still has an applicant status). Both private standards and government regulations are admissible for the Family of Standards. See www.ifoam.org/ogs.

Region	Country	Remark
European Union (27)[1]	Austria	Fully implemented
	Belgium	Fully implemented
	Bulgaria	Fully implemented
	Cyprus	Fully implemented
	Czech Republic	Fully implemented
	Denmark	Fully implemented
	Estonia	Fully implemented
	Finland	Fully implemented
	France	Fully implemented
	Germany	Fully implemented
	Greece	Fully implemented
	Hungary	Fully implemented
	Ireland	Fully implemented
	Italy	Fully implemented
	Latvia	Fully implemented
	Lithuania	Fully implemented
	Luxemburg	Fully implemented
	Malta	Fully implemented
	Poland	Fully implemented
	Portugal	Fully implemented
	Romania	Fully implemented
	Slovak Republic	Fully implemented
	Slovenia	Fully implemented
	Spain	Fully implemented
	Sweden	Fully implemented
	The Netherland	Fully implemented
	United Kingdom	Fully implemented
Non EU Europe (12)	Albania	Fully implemented
	Croatia	Fully implemented
	Iceland[2]	Fully implemented
	Kosovo	Not fully implemented
	Macedonia, FYROM	Fully implemented
	Moldova	Fully implemented
	Montenegro	Fully implemented
	Norway	Fully implemented
	Serbia	Fully implemented

[1] Council Regulation (EC) No 834/2007 of 28 June 2007 on organic production and labelling of organic products and repealing Regulation (EEC) No 2092/92. http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2007:189:0001:0023:EN:PDF

[2] www.landbunadarraduneyti.is/log-og-reglugerdir/Reglugerdir/Allar_reglugerdir/nr/79

Region	Country	Remark
	Switzerland[1]	Fully implemented
	Turkey	Fully implemented
	Ukraine	Not fully implemented
Asia & Pacific Region (25)	Armenia	Fully implemented
	Australia	Fully implemented
	Azerbaijan	Not fully implemented
	Bahrain	Not fully implemented
	Bhutan	Fully implemented
	China	Fully implemented
	Georgia	Fully implemented
	India[2]	Fully implemented
	Indonesia	Not fully implemented
	Iran	Not fully implemented
	Israel	Fully implemented
	Japan[3]	Fully implemented
	Jordan	Not fully implemented
	Korea, South	Fully implemented
	Kuwait	Not fully implemented
	Lebanon	Not fully implemented
	Malaysia	Not fully implemented
	New Zealand[4]	Fully implemented
	Oman	Not fully implemented
	Philippines	Not fully implemented
	Qatar	Not fully implemented
	Saudi Arabia	Fully implemented
	Taiwan	Fully implemented
	Thailand[5]	Fully implemented
	United Arab Emirates	Not fully implemented
The Americas & Caribbean (22)	Argentina	Fully implemented
	Bolivia	Fully implemented
	Brazil	Fully implemented
	Canada	Fully implemented
	Chile	Fully implemented
	Colombia	Fully implemented
	Costa Rica	Fully implemented
	Cuba	Not fully implemented
	Dominican Republic	Fully implemented
	Ecuador	Fully implemented
	El Salvador	Not fully implemented
	Guatemala	Fully implemented
	Honduras	Fully implemented
	Mexico	Fully implemented

[1] www.admin.ch/ch/d/sr/c910_18.html
[2] www.apeda.gov.in/apedawebsite/organic/index.htm
[3] JAS Standards for organic plants and organic processed foods: www.maff.go.jp/e/jas/specific/organic.html
[4] New Zealand Food Safety Authority (NZFSA) Official Assurance Programme for Organic Products: www.foodsafety.govt.nz/industry/sectors/organics
[5] Homepage of the National Bureau of Agricultural Commodity and Food Standards, www.acfs.go.th/eng/index.php

Region	Country	Remark
	Laos	Not fully implemented
	Nicaragua	Fully implemented
	Panama	Fully implemented
	Paraguay	Fully implemented
	Peru	Fully implemented
	Uruguay	Fully implemented
	USA[1]	Fully implemented
	Venezuela	Not fully implemented
Africa (2)	Morocco	Not fully implemented
	Tunisia	Fully implemented

Source: Survey by Beate Huber including contributions from Ong Kung Wai, Pedro Cussianovich, Patricia Flores, Diana Bowen 2014

Table 38: Countries in the process of drafting regulations

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

Source: Survey by Beate Huber including contributions from Joelle Katto-Andrighetto and Diane Bowen 2014

The Codex Alimentarius Guidelines: Recent developments[2]

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

The annex lists of the Codex Alimentarius Guidelines, which define what substances can be used in organic food and farming systems, have been under revision since 2005, with a focus on substances for food processing and criteria for the use of new substances. A working group within the Codex Committee for Food Labeling (CCFL), which was supported by the government of Canada, was appointed for this work. The Codex Commission adopted several amendments in the annex lists that were proposed by the

[1] www.ams.usda.gov/AMSv1.0/nop
[2] Information about Codex Alimentarius is available via www.codexalimentarius.net/web/index_en.jsp.

CCFL in July 2009. Other substances discussed, such as nitrites and nitrates, ascorbates for meat processing, and phosphates as food additives, were not approved in the Codex Guidelines for organic food. In 2010, an amendment was made to increase restrictions on the use of rotenone for pest control: the substance should be used in such a way as to prevent it from flowing into waterways.

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

Another issue, which has been on the agenda since 2010, is the use of ethylene for sprout inhibition in onions and potatoes. The debate on the use of ethylene continued in 2011 with the aim of extending its use to ripening of a broader range of tropical fruits: not just for bananas and kiwis for which it is already allowed. However, as no official request was forwarded, the Codex Committee for Food Labeling decided in 2012 to leave the current restriction to bananas and kiwi unchanged.

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

Furthermore, it has been agreed to take up another new area: organic aquaculture and seaweed production. In 2011, a first working paper was presented by the EU. A re-drafted version by the EU was circulated for comments and was discussed at the meeting of the Codex Committee for Food Labeling in May 2012 and May 2014. The discussion will continue, first through a working group (chaired by the European Union) and then in a physical meeting of the Codex delegates prior to the next CCFL meeting in May 2014 in Canada.

EU regulation on organic production

In July 2007, Council Regulation (EC) No 834/2007 of June 28, 2007 on organic production and labelling of organic products and repealing Regulation (EEC) No 2092/91 was adopted. It came into force on January 1, 2009.[1] This regulation describes the objectives, principles, and basic requirements of regulations for organic production. It is supplemented by the implementation rules, which describe the details on production, labelling, control, and imports (Commission Regulation (EC) No 1235/2008 of December 8, 2008, Commission Regulation (EC) No 889/2008 of September 5, 2008; Commission Regulation (EC) No 1254/2008 of December 15, 2008). In 2009, the implementation rules were augmented with the introduction of aquaculture standards.

[1] The revised Regulation 834/2007 and its implementation rules are published on the EUR-Lex website, lex.europa.eu. They are available in all official languages of the European Union.

Import requirements of major economies

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

Bilateral agreements between the exporting and the target import country

Most importing countries - including the United States, the European Union, and Japan - have options for bilateral recognition (i.e., the option to confirm that another country's control system and its standards are in line with domestic requirements and that the products certified in those countries can be sold on the national market). Bilateral agreements are largely political agreements that depend on the will and political negotiations of the governments, but are also based on technical assessments.

The United States and the European Union have recognized their respective national organic standards and control systems as equivalent. Animal products from the European Union and apples and pears from the United States are exempted from the agreement and require extra verification. Furthermore, products from aquaculture and wine production are not yet within the scope of the agreement. The formal arrangements came into force in July 2012.

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

The European Union currently recognizes eleven countries[3] as being equivalent with the EU system (known as the Third Country list).

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

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

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

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

Acceptance of the certifying agency by the target importing country

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

The EU has recently implemented new regulations concerning the importation of organic products. Products are only granted import into the EU if they have been certified by an inspection body or authority recognized by the European Commission.[1] The European Union publishes the list of approved control bodies and authorities recognized for applying equivalent standards and control schemes in non-EU countries in updates to EU regulation 1235/2008. Certification from recognized control bodies has been accepted for imports to the EU since July 1, 2012. The system of import authorizations is scheduled to expire in July 2014.

The US National Organic Program (NOP) requires all products labelled as organic in the US to meet the US standards (or the terms of an equivalency arrangement such as they have with the EU, Canada and Japan), including imported products. The US system provides for the approval of certification bodies as agents to operate a US certification program. Inspections have to be conducted by inspectors trained in NOP requirements using NOP-based questionnaires, and only certificates issued by certification bodies accredited by the US Department of Agriculture (USDA) are accepted. It is not relevant whether the certification body is based in the US or elsewhere. So far, the USDA has accredited almost 100 certification bodies according to NOP requirements, and only products certified by these certification bodies or covered by the agreements mentioned above may be exported to the US.

Literature

Commission Regulation (EC) No 1235/2008 of 8 December 2008 laying down detailed rules for implementation of Council Regulation (EC) No 834/2007 as regards the arrangements for imports of organic products from third countries; Consolidated version: http://cogent.controlunion.com/cusi_production_files/SISI_files/FL_081012024318_1235_2008_consolidated__2012JULY.pdf

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

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

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

Council Regulation (EC) No 834/2007 of 28 June 2007 on organic production and labelling of organic products and repealing Regulation (EEC) No 2092/91; Consolidated version: http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CONSLEG:2007R0834:20081010:EN:PDF

[1] There are currently two different lists:

- List of control bodies that apply a control system and production standards equivalent to the EU regulation on organic production (since July 1, 2012).
- List of countries whose system of production complies with rules equivalent to the EU's production and inspection provisions (see EU Regulation 1235/2008).

DiMatteo, Katherine (2007) Overview of group certification. Prepared for the 7th meeting of the UNCTAD/ FAO/ IFOAM International Task Force on Harmonisation and Equivalence in Organic Agriculture in Bali, Indonesia. 27-30 November 2007. http://www.unctad.org/trade_env/itf-organic/meetings/itf7/ITF0711_GrowerGroups.pdf

European Commission (2008) Guidelines on imports of organic products into the European Union. 15.12.2008. Rev.1. European Commission, Brussels. Available at http://ec.europa.eu/agriculture/organic/files/news/download-material/guidelines_for_imports_en.pdf

European Union Group of the International Federation of Organic Agriculture Movements (IFOAM EU Group) (2012) European Organic Regulations (EC) No 834/2007, 889/2008 and 1235/2008. An Evaluation of the First Three Years. Looking for Further Development. IFOAM EU Group, Brussels. Available at http://www.ifoam.org/about_ifoam/around_world/eu_group-new/positions/publications/regulation/index.php

Huber, Beate et al. (2012) "Standards and Regulations," In: Willer/Kilcher (Eds.) The World of Organic Agriculture. Statistics and Emerging Trends 2012, International Federation of Organic Agriculture Movements (IFOAM), Bonn, Germany and Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.organic-world.net/yearbook.html

Kilcher, Lukas et al. (2011): The Organic Market in Europe. Overview and Market Access Information for Producers and International Trading Companies. Fourteen Country Examples in the European Free Trade Association and the European Union, with a Special Focus on Switzerland. SIPPO, Zürich and FiBL, Frick

Schlueter, Marco, Camilla Mikkelsen et al. (2009): The New Organic Regulation for Organic Food and Farming in Europe: EC 834/2007 - Background, assessment and interpretation for stakeholders. IFOAM European Group, Brussels

Websites

www.fao.org/organicag/en: Information on organic agriculture by FAO with detailed country reports including legal situation

www.ifoam.org/about_ifoam/standards/index.html: IFOAM Guarantee system

www.ams.usda.gov/nop/indexIE.htm: Information about the US National Organic Program (NOP)

www.unctad.org/trade_env/itf-organic/ welcome1.asp: http://www.unctad.org/trade_env/itf-organic/welcome1.asp International Task Force on Harmonization and Equivalency in Organic Agriculture (ITF)

www.codexalimentarius.net/ download/standards/360/CXG_032e.pdf: The Codex Alimentarius Commission and the FAO/WHO Food Standards Programme: Organically Produced Foods, Rome 2007

ec.europa.eu/agriculture/organic/splash_en: Internet site of the European Commission on organic farming in all European Union languages.

Organic Guarantee Systems – an Evolving Landscape

DAVID GOULD[1]

Where We Are

Eighty-eight government organic regulations in force, 12 more in draft stages (2012). Over 100 private organic standards. More than 550 certification bodies. Numerous accreditation systems. Participatory Guarantee Systems. More country-to-country agreements and recognitions. It cannot be denied: the number of organic actors and corresponding interactions to control the market continues to rise.

There are increasing demands for credible guarantees in the market – by consumers and regulators alike, especially in light of serious fraud cases. At the same time, there are increasing demands for organic farmers and value chain actors to serve a broadening organic consumer base. Local, national, and export markets – those buyers and consumers all want to believe that they are really getting what they are paying for. And their governments are determined to protect these interests, one way or another. But more rules often means more barriers – more bureaucracy, more time, more cost…

The organic movement understands the need to evolve its market guarantee systems so that organic products can become the mainstream instead of merely occupying a growing "niche." The evolution needed is quantum and will likely take years to fully manifest; but all of the pieces are available.

Taking action on the present

The International Federation of Organic Agriculture Movements (IFOAM) is taking the lead using both short-term long-term strategies. In the short-term, it is working to increase market access, maintain credibility of standards, break down trade barriers, gain efficiencies, and protect against fraud.

Organic producers have options for selling their goods locally through farmers markets, Community Supported Agriculture (CSA's), or other direct-to-consumer channels. In these cases, how much of a formal guarantee is needed? Sometimes it is regulated by law, but trust building between producer and consumer can happen in less formal ways. IFOAM encourages development of these types of relationships. After all, certification as we have come to know it is only a proxy for the trust gained through real knowledge of the producer by the consumer.

Participatory Guarantee Systems (PGS) are gaining widespread interest and are forming across the globe.[2] They have the added benefit of capacity building for producers in addition to trust building among consumers. Mostly used for local marketing, PGS' proven performance is earning them recognition equivalent to third-party certification in some markets, overcoming barriers to market entry posed by high costs and bureaucracy commonly found in certification systems, especially for smaller producers.

[1] David Gould, IFOAM Value Chain Facilitator, International Federation of Organic Agriculture Movements (IFOAM), Charles-de-Gaulle Strasse 5, 53113 Bonn, Germany, www.ifoam.org
[2] See the article devoted to PGS in this volume for specific figures.

These forms of selling augment the organic sector's historic reliance on third-party certification systems and contribute to a broadening basis for mainstreaming organic into the future.

IFOAM's Family of Standards is a primary framework for guaranteeing that an organic standard adequately describes globally recognized expectations for what organic producers should do and their products represent. Whether the standard is for a national regulation, a private certification program, or a PGS, inclusion in the Family is an assurance that what is required has been carefully and consistently benchmarked by IFOAM experts for equivalence against widely accepted norms, namely the COROS (Common Objectives and Requirements of Organic Standards). With over 50 approved standards included and growing, the Family of Standards is the model for multilateral recognition and equivalence agreements. While bilateral country-to-country recognition arrangements continue to be announced, these are stepping-stones to the efficiency gained through multilateral recognitions that achieve the same ends with less work. (See also Gould 2013).

Analog in a digital age

Third-party certification and related assurance mechanisms, as currently practiced, use older – even outdated – modes of information transfer. The flash drives and e-mailed documents used today are still merely digital compressions of stacks of paper used before. While a certain amount of documentary evidence is needed to uphold most kinds of guarantees, experience shows that in almost all cases there is still something missing – namely adequate controls to discourage, prevent, or detect fraud. Fraudulent certificates and lack of quantity tracking threaten confidence in organic claims.

Modern data and information transfer systems provide solutions. Databases are being implemented to validate certification data such as operator names, products, and the standards and regulations with which they comply, in real time and in ways that prevent fraudulent certificates. Similarly, systems that can track and trace quantities from producer to final consumption assure that claimed organic products are indeed those which are controlled by the guarantee system (certification or otherwise). Keeping data in centralized systems like these also saves time and money for everyone in the value chain, by reducing redundant data entry and assuring common information used through secure, user-specific access permissions. The gains in efficiency and credibility have a direct impact on the ability of the organic sector to grow. IFOAM is working with partners in the organic movement on the design and implementation of these systems, and even further, to facilitate the interoperability of these systems to cover the globe comprehensively with real-time validation of certified organic products.

Innovative uses of information and communications technologies (ICT) are opening doors of transparency that are allowing guarantee systems to re-think how more people's efforts can be harnessed to share the workload of credible assurance, thereby allowing for greater market access and scalability. *Who provides information* is not as important as *how credible the information is.* Moving into the future, more people will be able to be involved in assuring market guarantees are credible. This can ease burden on certification bodies, provide better information, and clear bottlenecks.

Envisioning the future

In the longer term, there is a need to re-think and restructure both the nature and content of organic guarantees. Some stakeholders are concerned that the term "organic" is not relevant enough in these modern times, where competing sustainability labels address issues that most organic regulations (and even private organic standards) currently do not address so well, such as human rights, fair trading relationships, energy, and waste streams.

In an effort to re-position organic as the core approach to sustainability in agriculture, IFOAM and partners in the Sustainable Organic Agriculture Action Network (SOAAN) developed the Best Practice Guideline for Agriculture and Value Chains. This foundational document shows how organic practices are not the "top" but are rather the "base" or "core" onto which a broader implementation of sustainable practices needs to occur.

Using the Best Practice Guideline as a basis, IFOAM is now engaging leading organic standards schemes in a Best Practice Community, where standards owners, leading companies, and sustainability evaluation tools can showcase and share their learning and achievements for common benefit. These leading standards will also be part of the IFOAM Family of Standards, further increasing the amount of organic actors considered in this basic frame of credibility.

Looking further into the future, IFOAM and SOAAN are envisioning what organic guarantees need in order to assure that organic claims are a relevant market guarantee, namely encompassing a full spectrum of sustainability issues as described in the Best Practice Guideline: that organic production really moves toward realization of the Principles of Organic Agriculture. This will have to be possible in a way that does not overwhelm farmers and value chain actors with more burdens and verification requirements. In short, this is a potentially huge overhaul of organic certification, as we know it today into a different kind of guarantee. ICT tools, innovative ways of involving people through transparency and other forms of stakeholder participation, and increasing clarity of what are true indicators of organic performance can be combined into a new evolution of credible organic guarantee(s). It will likely take several years to arrive at consensus among stakeholders about what such a guarantee looks like, and more time to implement. Visioning and planning is beginning. IFOAM invites all interested stakeholders to participate in this evolution.

References

Gould, David (2013): The Organic Guarantee System: Keeping up with the Times. In: FiBL & IFOAM (2013): The World of Organic Agriculture. Statistics and Emerging Trends 2013. Frick and Bonn. More information: http://www.organic-world.net/yearbook-2013.html

International Federation of Organic Agriculture Movements (IFOAM) [online]: The IFOAM Best Practice Program. The Sustainable Organic Agriculture Action Network (SOAAN). The IFOAM website. Download: http://www.ifoam.org/en/value-chain/ifoam-best-practice-program. Accessed December 30, 2013.

Overview of Participatory Guarantee Systems in 2013

FLÁVIA CASTRO[1]

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

IFOAM is the only organization compiling global data[2] about PGS through various projects, as well as via an annual survey, which is being conducted since 2011. Based on the data collected, it is currently estimated that at least 50 PGS initiatives are now established on all continents, and over 60 initiatives are currently under development. The IFOAM Annual PGS Survey for 2013 identified 19 new PGS initiatives around the world, of which 9 are operational[3], and 10 are under development. Based on this survey and the current information available, the number of PGS certified producers has increased by 30%, to over 18'000 operators, between 2012 and 2013.

Increasing PGS recognition

PGS enthusiasts and practitioners have often been confronted with criticism targeted at a potential lack of credibility of quality assurance systems that are based on peer review and on the involvement of various stakeholders in the certification process. With no emphasis placed on the principle of independence (a key concern in the ISO world of certification), PGS have often been considered as a less valid assurance system when compared to third-party certification, both within and outside the organic sector.

IFOAM's activities in advocating and promoting PGS, on the other hand, are based on the conviction not only that they provide a trustworthy alternative to third-party certification, particularly suitable to small operators, but also that they contribute to a

[1] Project and PGS Coordinator at International Federation of Organic Agriculture Movements (IFOAM), Charles-de-Gaulle-Str. 5, 53113 Bonn, Germany, f.castro@ifoam.org, www.ifoam.org

[2] IFOAM's efforts to compile comprehensive data on PGS worldwide have started recently and are still under way; therefore, the data provided here is not exhaustive but can be considered a fair approximation of the situation in 2013. Some of the organic producers involved in PGS may be included in overall national organic agriculture statistics presented in this book. This might be the case, for example, in the following situations:

- If they are linked to, or recognized by, a national organic agriculture association which compiles national data on the organic sector (e.g. in New Zealand).
- When some of the producers involved in PGS also have a separate third party certification and are therefore counted in the data reported by certification bodies (this is for example the case in France, where 50 percent of the PGS-certified farmers have a double certification).
- When entire PGS groups are connected to the third party certification system by being audited and certified as a group (where the PGS manages an Internal Control System). In this case, they would also be counted in the data provided by certification bodies (this is, for example, the case for a few PGS in Latin America).
- However, in several cases, organic producers certified through PGS are not yet included in the national organic agriculture statistics because they are not sufficiently recognized by other institutions and they might even be denied the right to call themselves "organic" according to the regulation in place.

[3] The new initiatives identified through the 2013 Annual PGS Survey are categorized as operational or under development based on declarations provided by the corresponding contact persons. Not all of them have provided figures on the number of producers involved or certified; this will be ascertained in the course of the coming year.

more inclusive and stronger organic sector. IFOAM, alongside other supporting organizations (e.g. ISEAL, the umbrella organization of socio-environmental standard systems), believes that impartiality, rather than independence, is key to the credibility of a guarantee system, and that impartiality can also be achieved with a high level of stakeholder participation. IFOAM activities to support PGS range from advocacy for recognition of the value of PGS by governments, to the administration of a IFOAM PGS Logo[1] that is granted to applicant PGS once they have passed an evaluation conducted by the IFOAM PGS Committee, in order to obtain Official IFOAM PGS recognition.

Figure 46: The IFOAM PGS logo

In 2013, there was a sharp increase in the number of PGS officially recognized by IFOAM. The total figure now amounts to nine initiatives, distributed in Brazil, France, Namibia, New Caledonia, New Zealand, Philippines, USA, and Vietnam. It is interesting to note that these initiatives operate under national regulations for organic production that go from full PGS recognition (Brazil), through various levels of PGS acceptance, mainly in countries with younger organic markets, to compulsory third-party certification in countries with long-established organic regulations (France/EU and USA).

Recently, recognition of the important role played by PGS and the tools adopted within PGS in the framework of assurance systems has also increased beyond the organic sector and movement. In fact, along with a trend towards higher emphasis being placed on impartiality rather than on independence, peer review, the involvement of more stakeholders in the assessment process, and increased transparency have become features that are not only accepted but even recommended as good practices in guarantee systems.

Two interesting examples are the new guarantee system launched in May 2013 by the World Fair Trade Organization (WFTO) and the ISEAL's third Code of Good Practice - the Assurance Code. The first is a guarantee system for product certification, which is based on self-monitoring and peer review, combining first, second, and third party certification elements. More specifically, the new system introduces peer visits, with the aim of reducing the costs of monitoring audits and therefore making it more affordable to members.

[1] PGS initiatives officially recognized by IFOAM are allowed to use the PGS logo on their websites, flyers, and other communication materials, but not on the organic products. For more information on application and conditions for the use of the PGS Logo, please consult www.ifoam.org/en/global-online-pgs-database.

The second, the ISEAL Assurance Code, has a wider outreach, given the scope and potential repercussion across a vast range of schemes beyond organic, such as Forest Stewardship Council (FSC), Marine Stewardship Council (MSC), Rainforest Alliance, Fair Trade, etc. This international norm is actually the first to deliberately provide flexibility and a set of alternative requirements in order to accommodate a range of alternative guarantee systems, including PGS, while at the same time recommending as good practices elements such as stakeholder engagement in the audit process, knowledge sharing, and provision of advice.

PGS worldwide in figures

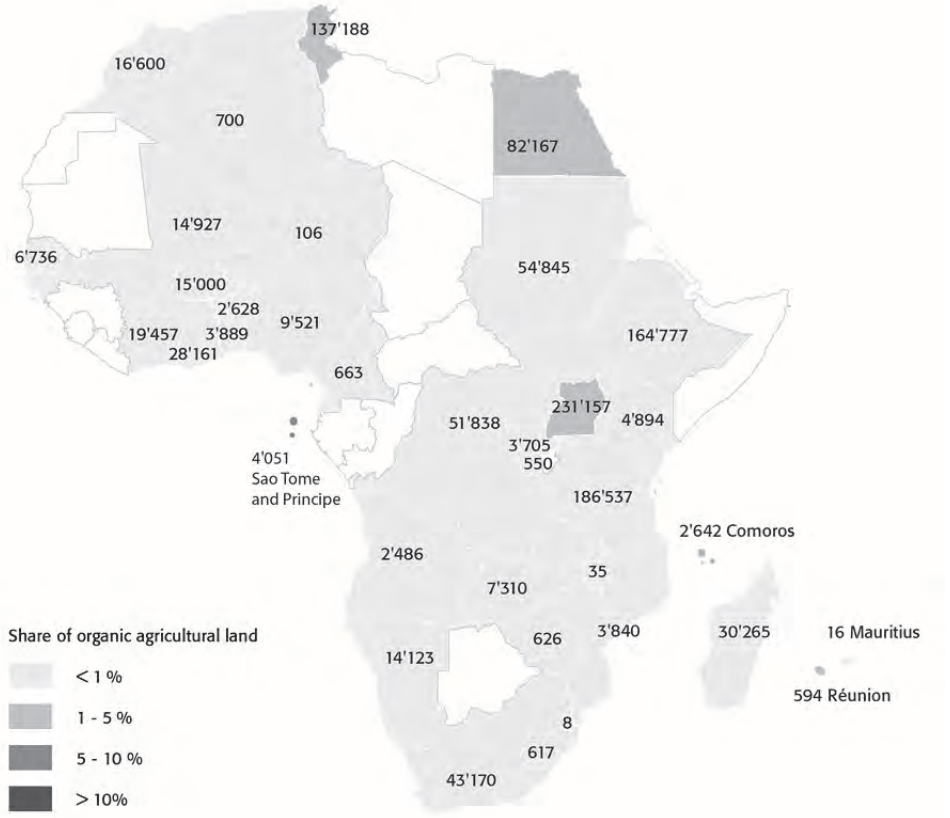
- It is estimated that over 49'000 small operators are currently involved in PGS worldwide. This includes mostly small farmers and a few small processors.
- The leading countries in terms of producers involved in PGS are the Philippines (10'620), Uganda (6'498), Tanzania (6'185), India (5'977), and Bolivia (4'058). Brazil and South Africa also play an important role, with over 3'300 producers involved in PGS in each country. With reference to the number of producers certified through PGS, India, Bolivia[1], and Brazil are the leading countries, with 5'191, 3'976 and 2'755 producers, respectively.
- Sub-Saharan Africa is currently the region with the highest number of producers involved in PGS, i.e., 16'834. It is followed by Latin America and the Caribbean (11'999), and by East Asia and the Pacific (11'765).
- The Latin America and the Caribbean region has the highest number of PGS initiatives that are currently operational (27) and under development (20); these are spread over 15 countries. Sixty-five percent of the producers involved in PGS in this region are already certified through their PGS.
- Europe and North America are two of the regions in the world with the lowest number of operational initiatives (6 and 4, respectively), but both have a very high rate of producers actually certified among those who are involved in PGS: 85.45% in Europe 76.5% in North America. The low number of PGS initiatives and producers can be explained by the government regulations that prohibit PGS from calling themselves "organic".
- It is estimated that PGS certified producers are currently managing organically a total of 52'664 ha of agricultural land.

Online references

› The IFOAM Participatory Guarantee Systems website: http://www.ifoam.org/about_ifoam/standards/pgs.html
› The IFOAM Online Global PGS Database: a comprehensive database accessible from the IFOAM PGS website.
› The IFOAM Global PGS Newsletter: a free electronic monthly publication. To subscribe, please contact pgs@ifoam.org.

[1] In Bolivia, data on PGS is collected by the "Servicio Nacional de Sanidad Agropecuaria e Inocuidad Alimentaria" (SENASAG), the competent authority. According to this data, there are 19 local PGS initiatives which are part of the national system ("SPGs municipales"), and one private initiative (Ecoferia Cochabamba). In the national system, producers who are involved in PGS are all certified even though they might belong to one of the 3 different categories depending on the stage of conversion: in transition 1 (T1), in transition 2 (T2) and organic ("ecológico").

Africa



Map 2: Organic agricultural land in the countries of Africa 2012

Source: FiBL-IFOAM Survey 2014; based on information from the private sector, certifiers, governments and, for North Africa, the Mediterranean Organic Agriculture Network (MOAN). For detailed data sources see annex, page 286.

Latest Developments in Organic Agriculture in Africa

HERVÉ BOUAGNIMBECK[1] AND JORDAN GAMA[2]

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

The International Federation of Organic Agriculture Movements (IFOAM) is currently working with the African Union, the African organic sector, and other agencies in the framework of its "Organic Alternative for Africa Initiative" to facilitate the integration of organic agriculture into the core of African policies and agricultural development agenda, including the Comprehensive African Agriculture Development Programme (CAADP)[3]. The Organic Alternative for Africa is aimed at identifying, promoting, and nurturing the uptake of organic agriculture practices, systems, markets, and policies in the context of sustainable development and poverty eradication. Therefore, IFOAM works with many stakeholders, both within the organic movement and, just as importantly, outside it, to help create opportunities and facilitate the growth of organic agriculture based development throughout the continent.

The African Organic Network

We are pleased to report that significant breakthroughs were achieved in 2013 in the institutionalization of the African Organic Network (AfrONet)[4], the umbrella organization established during the Second African Organic Conference to unite and represent African ecological/organic stakeholders. Below is an overview of the key achievements in the development of this important body for the future of the African organic movement and sector:

- Through intensive consultations and revisions, a constitution that includes the mandate, structures, and functions of AfrONet has been developed.
- The organization has been officially registered, and the office has been opened in Tanzania with an interim Coordinator hired in December 2013.
- A strategic plan has been developed.

---

[1] Hervé Bouagnimbeck, Organic for Africa!, International Federation of Organic Agriculture Movements, Charles-de-Gaulle-Str. 5, 53113 Bonn, Germany, www.ifoam.org

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

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

[4] Information about AfrONet is available at http://africanorganicnetwork.org/

- A new multi-language website was launched, and a general information brochure was published.
- A list of organizations, networks, and programs related to ecological/organic farming on the continent has been compiled.
- Partnerships and discussions with the Forum for Agricultural Research in Africa (FARA)[1] and IFOAM, as well as with projects such as the Productivity and Profitability of Organic and Conventional Farming Systems[2] (ProEcoOrganicAfrica) are underway.
- In conjunction with the African Union Commission, the Continental Ecological Organic Agriculture Steering Committee has been inaugurated, and preparation of the 3rd African Organic Conference, to be held 2015 in Nigeria, has commenced.

Third East African Organic Conference[3]

The third East African conference, entitled "Sharing achievements made and lessons learned", was held in Dar es Salaam, Tanzania, in July 2013. About 200 participants from 20 countries attended the conference.

The conference, organized by the IFOAM "Regional cooperation for organic standards and certification capacity in East Africa" (OSEA) Project[4], which ended last December, after three years of successful implementation with the financial support of the Government of Sweden in partnership with the Tanzania Organic Agriculture Movement (TOAM), was an excellent platform to share experiences learned since the launch of the East African Organic Products Standard six years ago, as well as a tool to facilitate advocating to a comprehensive range of stakeholders capable of unlocking the potential that organic/ecological agriculture offers for East Africa. More importantly, given that East Africa is leading the continent in organic agriculture, the conference provided a huge opportunity for stakeholders from other African countries and sub-regional sectors to learn from the East African experience.

The conference had a number of important outcomes:

- Reports on the implementation of the East Africa Organic Products Standard and the East African Organic Mark and the growth of organic market were presented.
- Projects and case studies were presented, including the short film "Kilimo Hai - Going Organic in East Africa".[5]
- A report on progress made in mainstreaming organic agriculture into relevant national and regional policies was made.

[1] Information about FARA is available here http://www.fara-africa.org/
[2] Information about the ProEcoOrganicAfrica is available at www.ProEcoAfrica.net
[3] Presentations, the conference declaration, and other documents are available at http://www.ifoam.org/en/east-africa-organic-conference-july-2-4-2013-dar-es-salaam-tanzania
[4] Information about the OSEA project, main achievements, studies and other documents are available at http://www.ifoam.org/en/osea-ii-project
[5] The film tells the story of how three smallholder farmers in Tanzania and Kenya escaped poverty, hunger, and diminishing yields through learning organic farming practices. It is available at http://www.youtube.com/watch?v=my0YvH-37kY&feature=c4-overview&list=UU6mL49c-D6hwfonBVEImClQ

– New aspects of organic production, such as aquaculture and Participatory Guarantee Systems were discussed.
– Successful research initiatives and sector development experiences were shared.

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

Within the frame of 3.5 years (July 2013 to December 2016), the ProEcoOrganicAfrica project will work towards improving rural livelihoods in Ghana and Kenya, including food supply, nutrition, and income security, through climate-smart ecological intensification of agricultural systems.

Under the coordination of FiBL (Research Institute of Organic Agriculture), and with the financial support of the Dutch Humanist Institute for Cooperation (Hivos) and the Swiss Development Cooperation (SDC), ProEcoOrganicAfrica[1] intends to generate scientific evidence and knowledge on the productivity, profitability, and sustainability of the ecological organic agriculture (EOA) in Ghana and Kenya. Sound conclusions and recommendations will be drawn on the potential of EOA to help farmers, especially women, to be economically successful and resilient to the adverse impacts of climate change and socio-economic challenges. Capacity building, networking, and a conducive policy environment will be promoted for effective and efficient sharing and exchange of knowledge/experiences, to enhance agronomic and scientific know-how. The findings will help decision-making by farmers, extension agents, and managers from public and private institutions, investors, and policy makers.

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

Outlook

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

[1] Information about the ProEcoOrganicAfrica is available at www.ProEcoAfrica.net

based on the principles of organic agriculture, can be unleashed and disseminated throughout the Continent.

References

Auerbach, R., Rundgren, G., and El-Hage Scialabba N. (Eds.) (2013). Organic Agriculture: African Experiences in Resilience and Sustainability. Food and agriculture organization of the United Nations (FAO), Rome. Available online from the website: http://www.fao.org/docrep/018/i3294e/i3294e.pdf

IFOAM (2013). Impacts associated with the uptake of organic agriculture in East Africa. Available online from the website: http://www.ifoam.org/sites/default/files/the_impact_of_organic_agriculture_in_east_africa.pdf

Africa: Current Statistics

Hervé Bouagnimbeck[1], Julia Lernoud[2] and Helga Willer[3]

The area of organic agricultural land in Africa increased by 70'000 hectares or 7 percent compared with 2011. There were 1.1 million hectares of agricultural land in 2012, which is 0.1 percent of the continent's total agricultural area, and 3 percent of the global organic agricultural area. In 2012, 38 countries reported data on organic farming. The area of organic agricultural land has increased by more than 1 million hectares from the 52'000 hectares in 2000. Uganda is the country with the largest organic area, with more than 230'000 hectares and with the largest number of organic producers. The country with the highest proportion of organic agricultural land is the island state Sao Tome and Principe with 7.2 percent of its agricultural area being organic, followed by Egypt with 2.2 percent and Comoros with 1.7 percent.

Land use

Land use details were available for only about two thirds of the organic agricultural land. In 2012, 47 percent of all organic farmland was used for permanent crops (541'000 hectares), 15 percent was used for arable crops (172'000 hectares), and three percent (31'000 hectares) was grassland/grazing area. Ethiopia (147'000 hectares), the United Republic of Tanzania (almost 128'000 hectares) and Tunisia (107'000 hectares) have the largest *permanent crop areas*. The key permanent crop is coffee, amounting to 194'000 hectares in total. As no crop details were available for some of the biggest African coffee producers, it can be assumed that the total figure for organic coffee is higher. The largest organic coffee areas are in Ethiopia and Tanzania. Fifteen percent of the organic farmland was used for *arable crops*; most of which are oilseeds (59'000 hectares) and aromatic, medicinal and culinary plants (19'000 hectares), and textile crops. Organic textile crops (mainly cotton) were grown on 62'500 hectares in 2012; the key producing countries were the United Republic of Tanzania (44'000 hectares), Sudan (10'000 hectares), and Mali (4'000 hectares).

Producers

There are more than 580'000 organic producers in Africa. The countries with the most organic producers are Uganda (189'000), United Republic of Tanzania (148'000), and Ethiopia (134'000). It can be assumed that the number of growers is higher because some countries only report the number of farm enterprises/companies.

Wild collection

Wild collection has an important role in Africa, with more than 9.5 million hectares certified as organic. Zambia is the country with the largest beekeeping area with 5.9 million hectares (data from 2009), followed by Namibia (2.5 million hectares), and Uganda (158'000 hectares). Medicinal plants such as devil's claw (*Harpagophytum procumbens*) play the most important role in wild collection.

[1] Hervé Bouagnimbeck, Organic for Africa!, International Federation of Organic Agriculture Movements (IFOAM), 53113 Bonn, Germany, www.ifoam.org
[2] Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[3] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

Organic Agriculture in Africa: Graphs

Africa: The ten countries with the largest organic area 2012
Source: FiBL-IFOAM survey 2014

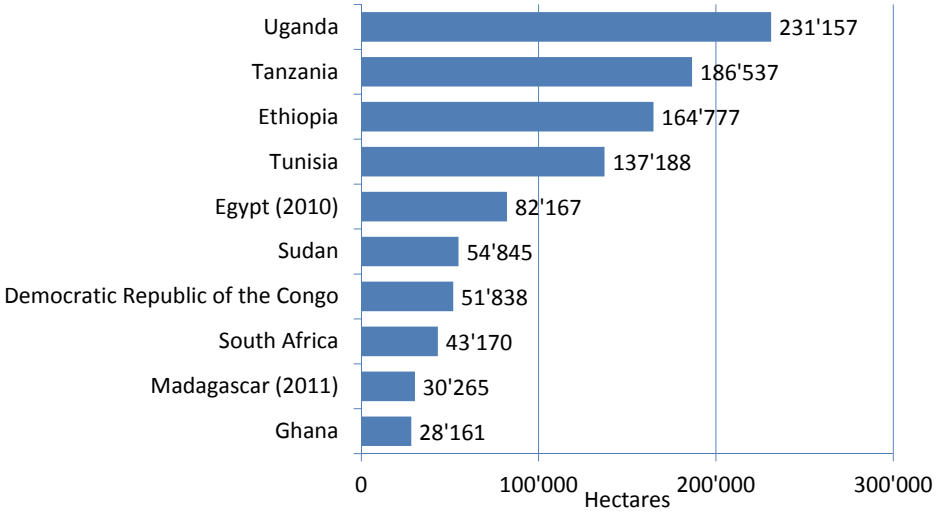


Figure 47: Africa: The ten countries with the largest organic agricultural area 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Africa: The countries with the highest share of organic agricultural land 2012
Source: FiBL-IFOAM survey 2014

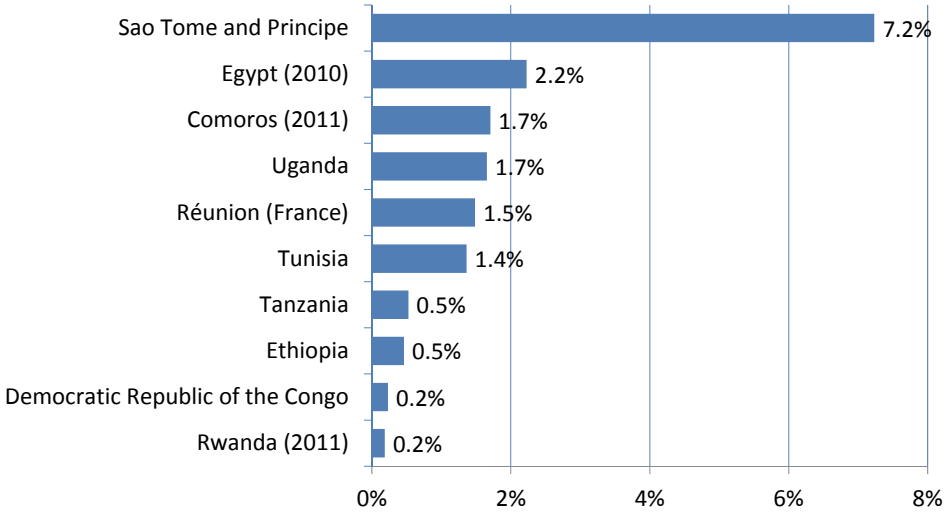


Figure 48: Africa: The countries with the highest share of organic agricultural land 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

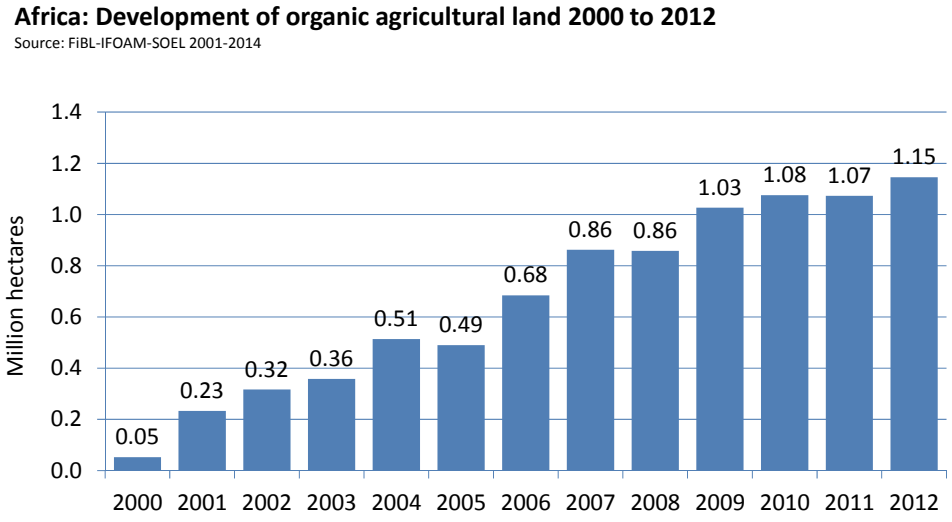


Figure 49: Africa: Development of organic agricultural land 2000 to 2012

Source: FiBL-IFOAM-SOEL-surveys 2000-2014

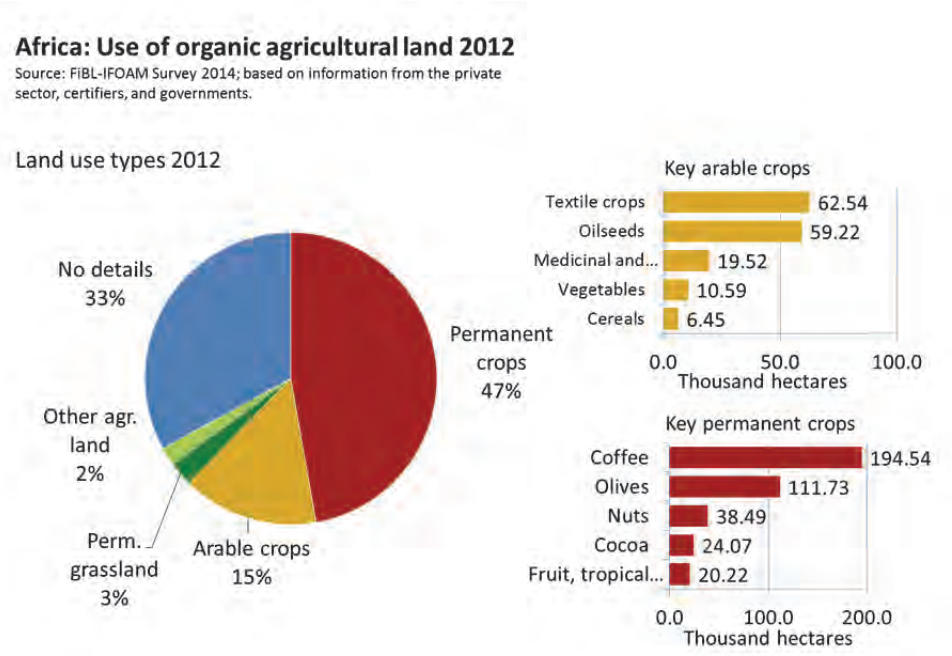


Figure 50: Africa: Use of agricultural land 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Africa: The ten countries with the largest number of organic producers 2012

Source: FiBL-IFOAM survey 2014

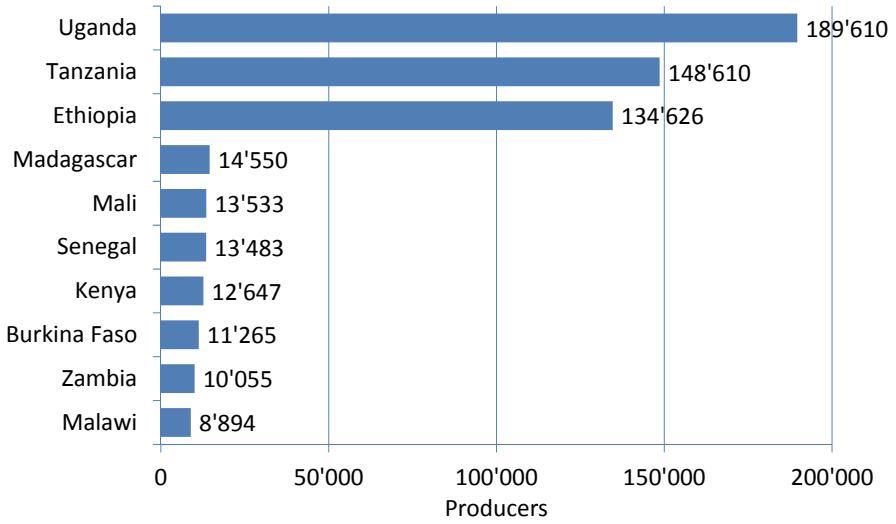


Figure 51: Africa: The ten countries with the largest number of organic producers 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Organic Agriculture in Africa: Tables

Table 39: Africa: Organic agricultural land, share of total agricultural land and number of organic producers 2012

Country	Area [ha]	Share of total agr. land	Producers[1]
Algeria	700	0.0%	57
Angola	2'486	0.0%	2
Benin	2'628	0.1%	3'269
Burkina Faso	15'000	0.1%	11'265
Burundi	550	0.0%	36
Cameroon	663	0.0%	88
Chad		Wild collection only	No data
Comoros	2'642	1.7%	1'416
Côte d'Ivoire	19'457	0.1%	277
Democratic Republic of the Congo	51'838	0.2%	1'123
Egypt	82'167	2.2%	790
Ethiopia	164'777	0.5%	134'626
Ghana	28'161	0.2%	1'915
Guinea-Bissau		Wild collection only	No data
Kenya	4'894	0.0%	12'647
Lesotho	617	0.0%	3
Madagascar	30'265	0.1%	14'550
Malawi	35	0.0%	8'894
Mali	14'927	0.0%	13'533
Mauritius	16	0.0%	3
Morocco	16'600	0.1%	120
Mozambique	3'840	0.0%	6
Namibia	14'123	0.0%	7
Niger	106	0.0%	2
Nigeria	9'521	0.0%	597
Réunion (France)	594	1.5%	126
Rwanda	3'705	0.2%	876
Sao Tome and Principe	4'051	7.2%	2'180
Senegal	6'736	0.1%	13'483
South Africa	43'170	0.0%	201
Sudan	54'845	0.0%	223
Swaziland	8	0.0%	1
Togo	3'889	0.1%	8'858
Tunisia	137'188	1.4%	2'302
Uganda	231'157	1.7%	189'610
United Republic of Tanzania	186'537	0.5%	148'610
Zambia	7'310	0.0%	10'055
Zimbabwe	626	0.0%	3
Total	1'145'827	0.1%	581'754

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

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

Table 40: Africa: All organic areas 2012

Country	Agriculture [ha]	Wild collection [ha]	Total [ha]
Algeria	700		700
Angola	2'486		2486
Benin	2'628	376	3004
Burkina Faso	15'000	80'018	95018
Burundi	550		550
Cameroon	663	110'000	110663
Chad		11'000	11'000
Comoros	2'642	70	2712
Côte d'Ivoire	19'457	344	19801
Democratic Republic of the Congo	51'838		51838
Egypt	82'167		82167
Ethiopia	164'777	180	164957
Ghana	28'161	19'813	47974
Kenya	4'894	41'486	46380
Lesotho	617	50'000	50617
Madagascar	30'265	23'711	53975
Malawi	35	20'000	20035
Mali	14'927	115	15042
Mauritius	16		16
Morocco	16'600	418'000	434600
Mozambique	3'840	31'400	35240
Namibia	14'123	2'453'200	2467323
Niger	106		106
Nigeria	9'521		9521
Réunion (France)	594		594
Rwanda	3'705	80	3784
Sao Tome and Principe	4'051		4051
Senegal	6'736	21'200	27936
South Africa	43'170	156'608	199779
Sudan	54'845	5'000	59845
Swaziland	8		8
Togo	3'889	242	4131
Tunisia	137'188	41'716	178904
Uganda	231'157	158'328	389485
United Republic of Tanzania	186'537	15'040	186537
Zambia	7'310	5'910'000	5917310
Zimbabwe	626		626
Total	1'145'827	9567927	10698714

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Table 41: Africa: Land use in organic agriculture 2012

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		364'739
Arable crops	Arable crops, no details	6'836
	Cereals	6'446
	Flowers and ornamental plants	15
	Green fodder from arable land	1'092
	Industrial crops	12
	Medicinal and aromatic plants	19'524
	Oilseeds	59'223
	Protein crops	5'696
	Root crops	465
	Seeds and seedlings	2
	Sugarcane	32
	Textile crops	62'541
	Tobacco	77
	Vegetables	10'587
Arable crops total		172'549
Cropland, no details	Cropland, no details	12'832
Other agricultural land	Fallow land, crop rotation	4'411
	Unutilised land	18'917
Other agricultural land total		23'328
Permanent crops	Berries	43
	Citrus fruit	9'561
	Cocoa	24'070
	Coconut	7'973
	Coffee	194'544
	Flowers and ornamental plants, permanent	10
	Fruit, no details	402
	Fruit, temperate, no details	1'567
	Fruit, tropical and subtropical, no details	20'220
	Grapes	1'017
	Medicinal and aromatic plants, permanent	15'935
	Nuts	38'495
	Olives	111'732
	Other permanent crops	106'436
	Tea/mate, etc.	9'003
Permanent crops total		541'010
Permanent grassland/grazing areas total		31'369
Total		**1'145'827**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Table 42: Africa: Use of wild collection areas 2012

Crop group	Area [ha]
Beekeeping	6'216'021
Forest honey	110'000
Fruit, wild	18'141
Marula, wild	70'000
Medicinal and aromatic plants, wild	2'510'057
Nuts, wild	89'644
Oil plants, wild	455'494
Wild collection, no details	353'218
Wild collection, other	51'193
Total	**9'567'927**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Asia

Map 3: Organic agricultural land in the countries of Asia 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, governments and the Mediterranean Organic Agriculture Network (MOAN) for the Mediterranean countries. For detailed data sources see annex, page 286.

Developments in Asia[1]

ONG KUNG WAI[2]

ASEAN Standard for Organic Agriculture (ASOA)

The ASEAN[3] Standard for Organic Agriculture (ASOA) is meandering its way to completion and, although it has remained under the radar, it is likely to serve as a landmark and be an influential development for the region in the future.

The Global Organic Market Access (GOMA) project is a 3 party partnership between the Food and Agriculture Organisation of the United Nations (FAO), the Untitled Nations Conference on Trade and Development (UNCTAD) and the International Federation of Organic Agriculture Movements (IFOAM). The GOMA project completed the development of the Asia Regional Organic Standard (AROS) in February 2012 as a regional benchmark for equivalence and for adoption by countries in the region that have not yet set their own national organic standards. A proposal, during its April 2012 meeting, by the Task Force on ASEAN Standards for Horticultural Produce to adopt AROS has led to the establishment of a Special Task Force for further consultation amongst member states. The Special Task Force met in April 2013 in Brunei. They agreed to use the AROS as a working document to develop an ASEAN Standard for Organic Agriculture (ASOA) and proposed three workshops to be held in the Philippines, Thailand and Malaysia before the next official Special Task Force meeting in April 2014.

The first workshop was held in October 2013, in Clark, Philippines and the second workshop was held in Bangkok, Thailand, in December 2013, in the midst of the protest and blockade of government buildings. Both workshops made good progress. Although there are still a number of places with text in brackets for further discussion, a working draft of the ASEAN Standard for Organic Agriculture (ASOA) will be ready for finalization at the third workshop, which is expected to be held in early March 2014. The focus now moves to completing a Strategic Plan of Action (SPA) for implementation and submission to the decision makers in ASEAN. In this case, it will first go from the Special Task Force for ASOA (STF-ASOA) to the Task Force on ASEAN Standards for Horticultural Produce; then to the ASEAN Sectoral Working Group on Crops (ASWG on Crops); and finally to the Senior Officials Meeting of ASEAN Ministers on Agriculture and Forestry (SOM-AMAF). The SOM-AMAF is the main ASEAN body that oversees the overall ASEAN cooperation in food and agriculture, with the guidance of the ASEAN Ministers on Agriculture and Forestry (AMAF).

If all goes well, the final draft submissions from the Special Task Force for the ASEAN Standard for Organic Agriculture (ASOA) will find endorsement at the Task Force on ASEAN Standards for Horticultural Produce in April 2014; will go for review by the ASEAN Sectoral Working Group on Crops (ASWG on Crops); and finally gain approval at the Senior Officials Meeting of ASEAN Ministers on Agriculture and Forestry (SOM-AMAF) in June 2014. Following the final approval, there will be the more complicated

[1] Incorporating input from Abdus Salam, Bangladesh; Winfried Scheewe, Cambodia; Zhou Zejiang, China; Thatsaka Saphangthong, Lao PDR; Basanta Ranabhat, Nepal; Vitoon Panyakul, Thailand

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

[3] ASEAN is the Association of Southeast Asian Nations, www.asean.org

task of implementation as well as establishing mutual recognition between ASEAN member states. Indonesia implemented an organic labeling regulation in the last quarter of 2013 and joins the Philippines and Malaysia as the three, out of ten, ASEAN member states that have now established organic labeling regulations. As daunting as the challenge may be, government officials of ASEAN member states appear to be motivated to take the necessary steps to fulfil the single market and production based vision of the ASEAN Economic Community (AEC), which is to be implemented by the end of 2015.

This pivotal development adds a complication to existing private and export market requirements as member states exert sovereignty over labeling. The United Nations Forum on Sustainability Standards (UNFSS), in its briefing held in conjunction with the first Standard for Organic Agriculture workshop in Clark, Philippines, called for smarter collaboration to address the emerging challenge encountered by ASEAN producers facing a minimum of 4 certifications: National GAP, Global GAP, and national organic and export organic certifications, to be able to trade agriculture produce and products within and beyond the region.

Other developments in the region

At the private sector level, IFOAM Asia held its inaugural revival assembly in June 2013 in South Korea, under South Korean sponsorship, and elected a 7-person board consisting entirely of men. Regional development and activity plans are still to be circulated. The roll out of the IFOAM Global Organic Mark in Thailand and Malaysia has not been met with an enthusiastic reception, while ambiguity over future fee calculation and the overall market development strategy have hindered local acceptance.

The Natural Products Asia trade fair (also known as NutraCon Asia) has been regularly held at the Hong Kong Convention & Exhibition Centre for a number of years, but was cancelled in 2013. Other organic related fairs, such as BioFach China and India reportedly did well. As the regional trade in organic products grows, the limitations of bilateral international recognition agreements are beginning to be felt. Operators in the region were at first happy to learn that Taiwan recognizes USA NOP[1] certification and were then disappointed to find out that it does not apply to them. Questions are beginning to arise about why their EU equivalent and USA NOP certifications do not offer similar access to export market destinations in the region, as do those from the EU and USA, while local markets based on Participatory Guarantee Systems (PGS) continue to grow. PGS is gaining recognition as a constructive step in the conformity assurance ladder: especially for small-scale farmers in emerging local markets. The Asian Development Bank is implementing a project that includes providing assistance to establishing Participatory Guarantee Systems as well as providing organic inspection training to the Greater Mekong Sub-region (GMS) states. The Asia Productivity Organization (APO) is unknown to many but has been conducting organic agriculture related training in the region for some years. The most recent training on packaging and labeling was held in July 2013 in Manila, Philippines. Trainees from ASEAN and Pacific countries participated.

The trickle of exchange study visits of organic sectors continues. In 2012, Thai and Malaysian buyers made a study and buying visit to Indonesia. In 2013, a delegation of 33

[1] NOP is the National Organic Programme of the United States of America.

participants from Hong Kong, comprising producers, activists, entrepreneurs, and government officials, made a study tour of the Malaysian organic sector, including a session with the Malaysian Department of Agriculture. A surprising challenge for the organic sector in Malaysia came by way of encouragement and a support pledge from the Malaysian Convention and Exhibition Bureau to Organic Alliance Malaysia to make a bid for the IFOAM Organic World Congress 2017. Whether the Malaysian organic sector will take up the challenge remains to be seen. How many are willing to come to Malaysia for the Organic World Congress in 2017?

China rules

Despite the more stringent organic rules that were promulgated in 2012 in China, the numbers of organic operators have not diminished with about 10'000 certificates issued in 2013 (about 2/3 for farms and 1/3 for processors and handlers). The 17-digit national product trace code is reportedly working well, and it is now easy to identify and differentiate authentic from fake organic labelled products in the market.

Following the revision of production rules in 2012, new organic certification management rules, issued in 2013, include cancellation of the Chinese 'organic in conversion' logo. Thus, no 'organic in conversion' logo will be allowed to be used after May 1st 2014.

For those who think Chinese certification are not at par with EU or US certifications, try to think how it is possible to have EU or US organic certified wolfberries[1] from China when it is not possible to have wolfberries certified according to the Chinese regulations. Besides wolfberry, apiculture is still not on the list of products allowed for organic certification in the country as experts regard their production to be highly susceptible to contamination, and tobacco is also not listed as a lot of people disagree on allowing tobacco to be certified to organic.

Technical barriers are no barrier when there are sufficient trade opportunities. Chinese certification rules headlined by some as the Chinese Organic Great Wall, is being scaled. Certificates have begun to be issued abroad with around 200 certificates issued in 2013 to operators outside China. On-site inspections were conducted by Chinese inspectors in Europe, North America, Oceania, Asia, Latin America and Africa. More inspections and certifications abroad are expected in the near future. Of the 24 registered certification bodies, four are of foreign origin. It used to be European and American inspectors parachuting incognito to conduct inspections around the world. Now, it is the Chinese turn to put their organic boots on the ground.

Nepal registration

Foreign certification bodies conducting inspection and issuing certificates to operators in Nepal should take note that the National Organic Agriculture Accreditation Body (NOAB) of Nepal published a notice that national and international certification bodies have to apply for accreditation to work in the country. The extended deadline for application was 7th January 2014. It is estimated that up to seven foreign certification

[1] Goji, goji berry or wolfberry is the fruit of Lycium barbarum and Lycium chinense, two very closely related species of boxthorn in the family Solanaceae. For more information see http://en.wikipedia.org/wiki/Goji

bodies have been sending organic inspectors into the country as tourists to conduct inspections, and this will soon be monitored and managed more properly.

Bangla boom

Whilst China takes the limelight, few may have noticed a market boom in Bangladesh. Producers and companies have reportedly started advertising their products as organic although it is unclear whether the claims are authentic as organic labeling is not regulated. Meanwhile, the Bangladesh Organic Products Manufacturers Association (BOPMA) has established a certification body (Organic Bangladesh Limited) and is offering certification according to its own Standard.

BOPMA was established in 2008 and has been lobbying the Ministry of Agriculture to regulate and formulate a National Organic Agriculture Policy (NOAP) without success. Along with training farmers to produce their own farm based organic fertilizer and pesticide, BOPMA is working to establish 500 organic fertilizer factories and 20 organic pesticide production units throughout the country to meet total demand for fertilizer and pesticides. It also plans to establish 50 outlets (organic shops) throughout the country to supply organic products to the consumers. BOPMA anticipates 2014 to be full of opportunities and is targeting an Organic Bangladesh by 2020. For more information about Bangladesh, see the full country report in page 167.

Bhutan caution

Whilst BOPMA is highly optimistic, the government of Bhutan has taken up caution. Following the much-reported announcement by the Bhutanese Prime Minister at Rio + 20 of the aim for Bhutan to be a 100 percent organic nation, the Minister of Agriculture has had to refute press reports of Bhutan going 100 percent organic by 2020. While iterating that becoming organic remains a goal, no hard targets have been set. He cited that there is a need to consult producers and actors in the country to ensure consensus and successful implementation. An International Conference on Organic & Ecological Agriculture in Mountain Ecosystems is scheduled to be held on March 5 to 8, 2014, in the capital city, Thimphu.

Cambodia stirs

Since its founding in 2011, development gained momentum in 2013, which made it possible for the Cambodian Organic Agriculture Association (COrAA) to conduct the first market fair exclusively for certified organic products to raise awareness for organic certification for the domestic market. The fair featured ten certified COrAA members offering vegetables, fruits, moringa products, pepper, and rice.

Collaboration in certification is developing apace. Training for organic inspection was held with Organic Agriculture Certification Thailand (ACT) in June 2013. COrAA later joined the Certification Alliance at the end of the year.

Laos forward

The organic sector had another good year in 2013, with more farms converting and registering under the government organic certification programme. The Department of Agriculture signed a contract with the Japanese International Cooperation Agency

(JICA) for an organic agriculture development project. This is in addition to the UN Inter Agency Cluster on Trade and Productive Capacity project to enhance sustainable tourism, clean production, and export capacity, which was reported last year.

Thailand wobble

The government support price for paddy continues to cause hiccups for organic rice exporters. Because of the high support price, some producer groups have reportedly dropped their organic certification and switched to selling their harvest under the government support price scheme. However, they are maintaining organic management as the support policy may change.

Significant sector developments include the establishment of the Thai PGS Organic Plus Network and the issue of the first PGS certificate by the Network. The Ministry of Commerce has maintained its support for an annual organic trade fair. However, the national organic agriculture development strategy is still not complete. Meanwhile, the National Bureau of Agricultural Commodity and Food Standards' (ACFS) announcement to develop mandatory organic rice standards received strong opposition and may not move forward.

For those lobbying for government involvement, it comes with ups and downs. In the case of Thailand, industry insiders reported they would rather do without government meddling.

Organic Farming in Bangladesh

MITUL KUMAR SAHA[1] AND S. M. MONOWAR HOSSAIN[2]

Demand for organic products is increasing rapidly in Bangladesh due to consumers' consciousness of food safety and environmental concerns. This paper contains information related to organic farming in Bangladesh.

Recent developments in Bangladesh

The Horticulture Export Development Foundation (Hortex Foundation) is interested in promoting organic production of some horticultural crops that are high in demand on domestic (urban) and export markets. The Foundation will render advisory services on production, post-harvest management, marketing and the organic certification process to interested parties. As part of its activities related to organic farming, the Foundation organized an expert consultation meeting on organic farming in Bangladesh, which was held on August 6, 2012 in Dhaka.

The program covered presentations on the development of a national organic program in Bangladesh; open discussions and strategies for an appropriate approach; the development of guidelines towards the introduction of organic agriculture suitable to Bangladesh; and the identification of key priority areas for future intervention. Government support is needed to establish a national policy, standard, and accreditation system. It was decided that the best way to do this is to form a National Working Group on Organic Farming (NWG), composed of eleven members. At its 88th meeting, the Governing Body of the Hortex Foundation, under the Chairmanship of the Honorable Secretary of the Ministry of Agriculture and the Chairman of the Hortex Foundation, approved the NWG. Three Sub-Committees of the NWG prepared a draft of the National Policy and Standards on Organic Farming for Crops, Fisheries, and Livestock. It is harmonized with the IFOAM standards, and there is both an English and a Bengali version.

The National Agriculture Policy emphasized the importance of organic farming in Bangladesh for the promotion of organic products - both for the local and export markets. The Government of Bangladesh supports generating and transferring eco-friendly technology and infrastructure facilities through different projects for safe and sustainable agriculture. The government will encourage the use of organic compost and organic fertilizer at farmers' level. Integrated Crop Management (ICM) is already practiced with the aim of conserving biodiversity and achieving sustainable land and water management in Bangladesh.

Andre Leu, president of the International Federation of Organic Agriculture Movements (IFOAM), visited Bangladesh from November 1-4, 2012, and participated in an expert consultation meeting of the National Working Group on Organic Farming: organized by the Hortex Foundation and held on November 1, 2012. He presented a paper

[1] Mitul Kumar Saha, Agriculture Economist, Assistant General Manager (Supply and Value Chain, Marketing, R&D), Hortex Foundation, Dhaka-1207, Bangladesh, e-mail: mitulecon@gmail.com, mitulsaha@hortex.org
[2] Dr. S. M. Monowar Hossain, Managing Director, Hortex Foundation, Dhaka-1207, Bangladesh, e-mail: hortex@hortex.org, monowar_sm@yahoo.com

highlighting the development of organic policy by citing examples from developing countries in Asia. He also covered some approaches in developed countries, which indicated that the cost of organic production is lower than that of chemical-based production.

The Asian Food and Agriculture Cooperation Initiative (AFACI) and the Bangladesh Agricultural Research Institute (BARI) jointly organized an AFACI project meeting on "Construction of the Asian Network for Sustainable Organic Farming Technology (ANSOFT)", which was held on August 20, 2013, in Dhaka, Bangladesh. Participants from Bangladesh, Cambodia, Indonesia, Laos, Mongolia, Nepal, the Philippines, Sri Lanka, Thailand, and Vietnam attended the meeting and presented their country reports, which focussed on the status of organic agriculture. Meanwhile, some enterprises have shown interest in commercial organic production of agricultural commodities for domestic as well as export markets.

History of organic farming in Bangladesh

Farm families grow different horticultural crops and rear domestic animals at their homesteads organically, following indigenous farming practices. They make farmyard manure using animals' excrement and crop residues: something they have been practicing for generations. They control pests using bio-pesticides and mechanical control measures. Hill farming on the Chittagong Hills and floating agriculture in the low-lying areas of the divisions of Barisal and Sylhet[1] are further examples of organic farming systems.

The use of high-yielding crop variety seeds, chemical fertilizers, and pesticides started on a commercial scale in the 1960s[2]. Since then, uses of these have increased. Hence, it can be stated that 50 years ago, Bangladesh's agriculture was basically organic. Nowadays, organic farming is gaining importance in Bangladesh due to various reasons, which include:

- An increased health consciousness of the people
- Maintaining a better environment
- Reducing the contamination of toxic substances in soil, water, and air
- Growing demand for tasty products due the increased purchasing power of the consumers
- Safeguarding and promoting biodiversity
- Improving soil organic matter content
- Improving and protecting soil fertility

[1] Bangladesh is divided into seven major administrative regions called divisions. Each division is named after the major city within its jurisdiction, which serves as the administrative capital of that division. For more information, see http://en.wikipedia.org/wiki/Divisions_of_Bangladesh

[2] Uddin, M. A., & Rashid, S. M. H. (2011). Role of Department of Agricultural Extension (DAE) in promoting organic vegetable production in Bangladesh. Paper presented in the workshop on Construction of Organic Agriculture Network in Bangladesh held in July 2011 at BARI, Joydebpur, Gazipur, Bangladesh.

Production data

Correct statistics on the state of organic farming in Bangladesh are not available. However, in the absence of a systematic national census on organic farming in Bangladesh, the Research Institute of Organic Agriculture (FiBL)[1] documented 2'500 hectares of land under organic agriculture and aquaculture (cereals, pulses, fruits, vegetables, spices, fishes including cultured shrimps, tea, and honey) in Bangladesh, as of 2008. In addition, the actual area may be much more if most of the 1.5 million homesteads that observe traditional organic practices are added, in which fruits, vegetables, and some spices are grown virtually without any synthetic inputs. Recently, AGM (Marketing) and the Hortex Foundation collected primary data through personal communication with the different organizations involved in organic production, as well as secondary sources. According to this survey, as of 2013, the estimated area used in Bangladesh for organic production (including aquaculture) is about 16'200 hectares.

Key agricultural commodities

A wide range of high-value and high-quality agricultural commodities is now being produced commercially under organic farming systems in Bangladesh. They are marketed both in the domestic and export markets. Some of the high-value agricultural commodities are listed below:

- Tea
- Shrimp
- Rice
- Fruits, such as banana, mango, coconuts, papaya, and pineapple
- Vegetables like mushroom, tomato, cucumber, eggplant, broccoli, and potato
- Spices like ginger, turmeric, garlic, onion, peppers, and bay leaves
- Milk from indigenous cows
- Eggs of indigenous chickens & ducks, including few commercial layer farming
- Meat such as goat, beef, chicken, and lamb
- Honey from Sundarban (a World Heritage area), mustard, litchi, and black cumin
- Different herbal and medicinal plants/products, etc.

Operators

Complete data on the number of producers and processors involved in organic farming in Bangladesh is not available. However, the authors identified three internationally certified organic processors in Bangladesh, namely Kazi and Kazi Tea Estate Ltd. (KKTE), WAB Trading Int'l (Asia) Ltd., and Sabazpur Tea Company Ltd. (a sister concern of Square Group). Major actors are involved in the organic supply chain, such as input sellers, producers, processors, transporters, packers, wholesalers, retailers, exporters, and certifiers (international and local).

[1] Willer, H., & Kilcher, L. (Eds.). (2010). The World of Organic Agriculture: Statistics and Emerging Trends 2010. IFOAM, Bonn and FiBL, Frick.

Key institutions involved in organic farming

Non-governmental organizations (NGOs) are the pioneer to campaign for organic farming in Bangladesh. The Forum for Regenerative Agriculture Movement (FORAM) in Bangladesh lists 138 organizations; 47 of which are engaged in practicing organic agriculture, 87 intend to practice sustainable agriculture, and four are involved in advocacy and campaign for the sustainable development of agriculture. Among these NGOs, PROSHIKA is the leading organic practitioner in Bangladesh.[1]

According to the authors' knowledge, the currently leading organic producers are WAB Trading Int'l (Asia) Ltd., for organic shrimp production and export, and Kazi and Kazi Tea Estate Ltd. (KKTE) for the production of world-class organic tea, vegetables, and herbs: both for domestic and export markets.

Domestic market

In Bangladesh, proper market data are not available to assess the size of the market share and identify best-selling products. The increasing trend of organic farming on a commercial scale in Bangladesh is possibly due to a higher demand for organic produce: both in domestic and international markets. However, the organic food market is not yet fully developed in Bangladesh. Even so, a few organizations are adopting organic farming practices for some crops in Bangladesh. They are trying to supply organic produce such as vegetables, cereal crops, and tea as best-sold products through their own outlets and on a limited scale (e.g. Kazi & Kazi Farms, PROSHIKA, Harvest, Shosya Probortona Ltd., etc.). Organic commodities are often sold via specific sections of many conventional department stores such as Agora, Nandan, or Swapno in Dhaka city. Meanwhile, Kazi & Kazi Farms sells organic vegetables at its own supermarket, "Meena Bazar", in Dhaka. Other marketing channels include contract farming, direct sales from farmers at local markets, and Bangladesh Agricultural Development Corporation (BADC) sales of organic/safe products through its urban outlets in Dhaka. Looking at one specific crop, we may consider the mushroom. This product as an organic item is remarkable for its nutritional and medicinal value, and it is now increasingly being grown and marketed in response to rising consumer demand in Bangladesh. However, domestic and international marketing of the mushroom has yet to be improved for it to be promoted in an effective supply-chain network.

In spite of the high demand for organic food in Bangladesh, the supply of organic products is not currently sufficient. As such, using organic production and efficient supply-chain management are the right business strategies to fulfil the growing demand of conscientious consumers in Bangladesh. Globally, the demand for organic food is increasing, which in turn encourages organic farming in Bangladesh.

Trade: Exports and imports

The export of organically produced commodities is still at a rudimentary phase in Bangladesh. However, there is potential for the export of some selected agricultural commodities, if all of the buyers' requirements are met. This would include the reliable

[1] Ahmad, S., Uddin, M. N., & Halim, G. M. A. (2011): Status of organic farming in Bangladesh and future direction. Paper presented in the workshop on Construction of Organic Agriculture Network in Bangladesh held in July 2011 at BARI.

certification system. Bangladesh can enter into the mainstream export markets: particularly in the USA; EU; and Far East, by improving its production of organic goods. Some of these items would include tea, cereals, fruits, vegetables, spices, fish, honey, herbal goods, and medicinal products. At present, tea, shrimp, and some herbal and medicinal products are being exported from Bangladesh to different countries on a limited scale. Nonetheless, correct statistics regarding export and import volume are not available at the moment.

There are, however, some relevant statistics. For example, in 2013, WAB Trading Int'l (Asia) Ltd. exported about 2'645 metric tons of 100 percent finished organic shrimp: mainly to EU countries such as Germany, Austria, and Switzerland. This company received a gold medal from the Bangladeshi government for producing organic goods and exporting them. The German government has also given a special award to WAB Trading Int'l (Asia) Ltd. in 2013.

Kazi & Kazi Tea Estate Ltd. has been promoted by Harrod's of London. The company launched its biodegradable packaging line under the brand name of "Teatulia" in the USA in 2008 and in other export markets of the Middle East, Malaysia, and Hong Kong. Market growth rates are at 15 to 20 percent annually.

Legislation

There are several laws that deal with food safety issues in Bangladesh. The Pure Food Ordinance 1959 prohibits the manufacture or sale of "any article which is adulterated". The Pure Food Act 2005 designated the adulteration of foods as an offence and determined relevant penalties. The Consumer Rights Protection Act 2009 discusses hazardous products among several other issues. This act was created with the purpose of upholding consumer rights and preventing anti-consumer activities. Probably one of the biggest drawbacks of the whole framework of food safety in Bangladesh is that this issue is dealt with not by a single body but by different ministries. Moreover, laws are not backed by proper logistical, financial, and manpower support, which is required for their implementation at the grassroots level. The government of Bangladesh drafted the Food Safety Act 2013, which passed in the National Parliament on 9 October 2013 and was approved by Presidential Order on 10 October 2013. One positive effect of this law is that there will be a single authority on food safety. The new agency, the Bangladesh Food Safety Authority (BFSA), will draw resources from different ministries entrusted with combating food adulteration. The new act will raise penalties substantially, with punitive measures ranging from fines of 1 million taka[1] and imprisonment for seven years to a doubling of sentences and fines for repeat offenders. Precisely how BFSA will coordinate activities with other ministries and the Bangladesh Standards and Testing Institution (BSTI) is now the main challenge of this new agency.[2]

At present, there is no national organic policy, standard, inspection, or certification system in Bangladesh. However, the National Working Group on Organic Farming (NWG) has dealt with the issue of organic farming in Bangladesh with a secretary at the

[1] The taka is the currency of Bangladesh. One taka is approximately 0.01 euros.
[2] Chadha, M. L. (2013). Keynote paper on post-harvest management and quality assurance of high value horticultural crops, Supply Chain Development Component (SCDC) of National Agriculture Technology Project (NATP), Hortex Foundation, Dhaka.

Hortex Foundation in Dhaka. As a result, a draft has been developed of national policy and standards on crops, fisheries, and livestock components. The draft policy and standards will be validated by the stakeholders of organic farming, and then necessary action will be taken to get the approval of the Ministry of Agriculture and the Ministry of Fisheries and Livestock.

Government support and international cooperation

The government of Bangladesh places high importance on the production and export of different high-value agricultural commodities through the diversification of produce and market promotions. However, the export potential of fresh and processed organic goods has not yet been fully exploited. For domestic and export market development, the government of Bangladesh has prioritized the promotion of environmentally friendly agriculture/organic produce in its National Agriculture Policy of 2012. The government has also taken different measures to ensure the supply of safe food in the marketplace.

In order to boost the exports of organic products, Bangladeshi government officials have provided an incentive to private exporters for exporting goods. The incentive is for fresh fruits, vegetables, and potatoes; processed agricultural commodities; and frozen shrimp based on the FOB[1] value. The Business Promotion Council (BPC) of the Ministry of Commerce also supports entrepreneurs who are involved in organic production.

The government of Bangladesh currently stresses the importance of supporting organic farming technologies, such as the use of vermin-compost, pheromone technology, and bio-pesticides, through different projects. One such project is the Supply Chain Development Component of the National Agricultural Technology Project. The enterprise is being implemented by the Hortex Foundation with the financial support of the World Bank, the International Fund for Agricultural Development (IFAD), and the Bangladeshi government. This component is working with 8'000 farmers under 400 common interest groups (CIGs) to promote the production of safe fruits, vegetables, and flowers in 20 Bangladeshi upazilas (subdistricts).[2]

As food safety issues have become major concerns regarding agricultural production and food-processing systems in Bangladesh, the FAO Food Safety Project established a well-equipped laboratory at the National Institute of Public Health under the Ministry of Health and Family Welfare in July 2012. The laboratory has the capacity to analyze heavy metals, harmful chemical residues, microbes, etc. Moreover, a system has been established for food-borne illness surveillance, providing information for the planning, implementation, and evaluation of preventive approaches to food safety.

Research, training, and advice

Different research organizations, universities, and some private organizations are carrying out adaptive research on organic farming in Bangladesh. Nevertheless, systematic and effective coordinated efforts are very limited. The Horticulture Research Centre (HRC) of the Bangladesh Agricultural Research Institute (BARI) has been conducting research on organic agriculture since 2008 to develop technologies on

[1] FOB is an acronym for "free on board", meaning that the buyer pays for the transportation of the goods.
[2] The districts of Bangladesh are divided into subdistricts called Upazila or Thana. For more information, see http://en.wikipedia.org/wiki/Upazilas_of_Bangladesh

vegetables and produce varieties by following IFOAM standards. In the meantime, BARI has developed the Bangladesh Organic Agriculture Network (BOAN) among the stakeholders of organic agriculture. Bangladesh Agricultural University, the University of Dhaka, Bangabandhu Sheikh Mujibur Rahman Agricultural University, the Rural Development Academy, the Kazi & Kazi Tea Estate, Wab Trading Int'l (Asia) Ltd., the Square Group, and other companies are involved in organic research and development activities in Bangladesh.

The Hortex Foundation renders advisory services and training to different stakeholders with its limited resources. Moreover, extension agencies, such as the Department of Agricultural Extension (DAE), the Department of Fisheries (DoF), the Department of Livestock Services (DLS), the Bangladesh Agricultural Research Institute (BARI), the Rural Development Academy (RDA), and agricultural universities, are some of the other entities that give instruction to trainers, farmers, and traders who are interested in organic farming in Bangladesh.

Despite all of these positive developments, there is a long-term need for investment in the Bangladeshi organic industry. This would enable the provision of formal technical training, encouragement of practical skill development, and cultivation of professional expertise with regard to organic agriculture. Meanwhile, organic farming has not yet been expanded to satisfy the requirements of different organic products for consumers. Consequently, support from the international agencies involved in organic farming will be needed to strengthen institutional capacity for research, extension, and marketing of organic products in Bangladesh.

Links/Further reading

- www.asa.org.bd: Website of ASA. The institutional mission of ASA is to support and strengthen the economy at the bottom of the socio-economic pyramid by facilitating access to financial services for the poor, marginalized and disadvantaged
- www.bopma.org: Website of the Bangladesh Organic Products Manufacturers Association (BOPMA
- www.hfwbd.net/organic-farmingt: Organic farming pages at the website of Hunger Free World (HFW) Bangladesh
- www.hortex.org: Website of the Horticulture Export Development Foundation
- www.kazitea.com/brand.html: Website of the Kazi & Kazi Tea Estate Ltd.
- www.organicsbd.com: Website of The Organic Farmer, a large organic producer organisation in Bangladesh.
- www.pciaonline.org/Unnayan-Dhara+: Website of Unnayan Dhara. Its mission is to create a process of participatory development and social structural change towards equal rights and sustainable livelihood of the poor, marginal and underprivileged people.
- www.registrarcorp.com/fda-food/index.jsp
- http://seatglobal.eu: Website of SEAT – Sustaining Ethical Aquaculture Trade
- www.sgsgroup.com.bd/en/agriculture-food.aspx: Website of SGS Bangladesh Limited
- www.shushilan.org: Website of Shushilan set up in 1991 to meet the needs of the disadvantaged communities in Bangladesh.
- www.wab-asia.com: Website of WAB Trading International (Asia) Limited
- www.was.org: Website of the World Aquaculture Society

China: Organic Tea Production Development and Market Trend

YUHUI QIAO[1]

Organic tea from Lin'an County of the Zhejiang Province, with SKAL certification by the Netherlands, was exported for the first time in 1990. This marked the launch of organic production in China (IFAD, 2005). The organic sector was consolidated with the issuance of national regulations for certification and accreditation in 2005, including a national logo for organic products. The domestic market has been growing since (Qiao, 2011).

Organic tea production in China

China has 45 percent of the world's total tea growing area and more than 80 million tea farmers across the country (IFAD, 2005). In 2009, the tea production area was about 1.86 million hectares; production was at 1.35 million tons, which was double the tea production volume in 2000; and one quarter of the tea produced was for export (Blue book of the tea industry, 2010). China produces all kinds of tea. Since 1993, the exported tea has mainly been green tea, with 234'000 tons accounting for 78 percent of total exports in 2010. The main tea production area is in the south of China, from Qinling Mountain to Huaihe River. Tea is produced both by relatively wealthy provinces, such as Zhejiang (14.05 percent of total Chinese tea production), Fujian (19.43 percent), and Guangdong (4.29 percent), and poorer provinces such as Yunnan (14.91 percent) (Blackmore et al., 2012).

By the end of 2011, organic tea was grown on approximately 50'000 hectares, and 100'000 tons were produced. More than 700 enterprises were involved in organic tea production in China. Data show that Zhejiang is the most important organic tea-producing province: both in terms of organic tea area and of the number of farms or enterprises involved; followed by Hubei, Jiangsu, Yunnan, Sichuan, Jiangxi, Fujian and Anhui Province.

Export of organic tea

Almost all of the exporting organic farms are certified according to EU and NOP (National Organic Programme) regulations; only one tenth of the tea farms also apply for JAS (Japan Agriculture Standard) certification, according to data from main foreign certifiers (ECOCERT, BCS, IMO, CERES, and JONA). The export amounts and trade value of organic tea from 2009 to 2011 can be seen in Figure 52. The exported amount is about 3'000-4'000 tons, and the value is 17-22.5 million US dollars. There are around 20 countries importing organic tea from China: US and Germany are the two biggest importing countries (75 to 80 percent of all Chinese tea exports), followed by France, Denmark, UK, Japan, Holland, and France.

[1] Yuhui Qiao, College of Resources and Environmental Science, China Agricultural University, Beijing 100193, China

Figure 52: The export amounts and trade value of organic tea from 2009 to 2011

The tea varieties include green tea, black tea, Oolong tea, white tea and Pu'er tea according to different tea fermentation periods. Jasmine tea is green tea with the flavour or flower of jasmine. The certified organic tea also includes these kinds of tea varieties. Data from the certifier ECOCERT in 2009 shows that 57.5 percent of the exported tea is organic black tea. Organic green tea constitutes 20.4 percent of all tea exports followed by white tea and jasmine tea.

Organization of smallholder farmers and fair trade organic tea

Most of the organic tea production (80 to 90 percent) is organized by companies and cultivated on their own or rented lands. According to information from the organic tea enterprises and certifiers, this organization makes it is easier to control the quality of organic tea. This allows for new equipment and facilities, as well as production and processing, to be industrialized. Production by organic tea farmers' associations and companies contracting smallholder tea farmers accounts for only 10 to 20 percent of the total certified tea. Usually, the tea area is very small, ranging from 0.5 to 5 hectares per household in remote mountain areas. For the development of organic tea production, it will be crucial to organize the smallholder farms and to set up farmer cooperatives or associations. This way, their tea products will become competitive, and certification will be easier. This is the current development trend of organic tea production in China.

Fairtrade is defined as an alternative approach to conventional trade that aims to improve the livelihood and well-being of small-scale producers. Its emphasis is on fairness and building livelihoods through minimum prices and social premiums. Fairtrade regards environmental sustainability as necessary in order to underpin sustainable livelihoods. Certification for both fairtrade and organic has become increasingly common; In China, fairtrade is at the very early stages and has been influenced by international trade. By the end of 2008, there were about seven organic

traders and six organic producers, located in the provinces of Jiangxi (2), Hubei (2), Yunnan (1), and Fujian (1) (Chen, 2009). As a general rule, fairtrade certification was required by importers and organized by exporters and producers. There was a visible community development dimension linked to the Fairtrade International (FLO) certification because part of the premium should be allocated to improvements in the community or village and not directed to individual farmers (Blackmore et al., 2012).

Strategy for organic tea development

The organic sector in China, as a whole, is developing rapidly with a large variety of cash crops, including tea in sub-tropical and temperate provinces (Kledal P.R. et al, 2007). The initial development was foreign-market driven, and some export companies collaborated directly with local authorities to facilitate the conversion of villages and households. Since 2005, domestic organic tea sales have been larger than the quantity of organic tea exported. The data analysis of production and the potential market also shows that organic tea production will continue to grow in China.

In order to facilitate the development of organic tea in China, financial policies, including subsidies, reduction of tax and certification expenses, and other systems have been established. These are granted under the WTO[1] green box policy, which needs to be set up and implemented to secure the good and stable development of organic farming. The organization of smallholder farms is also an important factor for the positive development of organic agriculture. Currently, the central government and local governments are promoting specialized farmer organizations; a good way to organize small farmers and their cooperation with trade companies for sustainable organic development.

Acknowledgments

This work was supported financially by Key Beijing Discipline of Ecology (XK10019440).

References

- Blackmore, E. and Keeley, J. with Pyburn, R., Mangus, E., Chen, L. and Yuhui, Q. (2012) Pro-poor certification: assessing the benefits of sustainability certification for small-scale farmers in Asia, Natural Resource Issues No. 25. IIED, London.
- Blue Book of Tea Industry 2010 Social Sciences Academic Press
- Chen, W. 2009. From Tea Garden to Cup: China's tea sustainability report. Social Resources Institute, China. See http://somo.nl/publications-en/Publication_3089/at_download/fullfile
- IFAD. 2005. Organic Agriculture and Poverty Reduction in Asia: China and India Focus. Thematic Evaluation. Document of the International Fund for Agricultural Development, IFAD Report No. 1664. Rome.
- Kledal, P.R., Yuhui, Q., Egelyng, H., Yunguan, X., Halberg, N., Xianjun, L. Country report: organic food and farming in China. In: Willer, H., Yussefi, M. (Eds.), The world of organic agriculture e statistics and emerging trends 2007. IFOAM and FiBL, 114-119.
- Yuhui, Q. (2011): Organic Agriculture Development in China. In: The World of Organic Agriculture. Statistics and Emerging Trends 2011. FiBL-IFOAM Report. IFOAM, Bonn and FiBL, Frick 132-136

[1] World Trade Organization (WTO), www.wto.org

The Organic Farming Sector of the United Arab Emirates

Saif Mohamed AlShara[1]

Organic farming in the United Arab Emirates

The organic farming sector in the United Arab Emirates (UAE) has developed rapidly in terms of producers, area, number of crops grown, market, and regulation. The latest figures (2012) show that UAE has 34 organic farms with a total certified area of 3'905 hectares (page 186).

Table 43: United Arab Emirates: Organic farming statistics

Certified farms	34
Total area (ha)	3905
Number of certified crops	More than 62 varieties
Certified livestock farms	3
Certified organic food processing units	1
Organic fertilisers production plants	1
Number of the national certifying bodies	1

Moreover, organic livestock farming is developing, and three livestock farms are certified as organic farms. In addition, there is one organic food processing plant.

Organic farm in the United Arab Emirates

More than 62 crop varieties are grown and sold as organic. Vegetables grown include beans, beetroot, broccoli, cabbage, chillies, cucumbers, eggplant, fennel, carrots, green peas, a number of lettuce varieties, marrows, onion, okra, potatoes, strawberries, sweet

[1] Eng. Saif Mohamed AlShara, Assistant Undersecretary for the Agricultural Affairs and Animal Sector, Ministry of Environment and Water, 1509 Dubai, United Arab Emirates

corn, and tomatoes. Another important issue to be mentioned is that the UAE is considered one of the main producers of organic palm dates. It is estimated that the average volume of organic dates produced yearly is about 1'000 tons.

The UAE organic food market

The organic food market of the United Arab Emirates is booming, and supply cannot meet demand. This creates opportunities for the organic food industry. The growing demand for organic food is due to a number of reasons: one of them being that the Ministry of Environment and Water has launched awareness programs addressing organic farming, health issues, environmental issues, and affordability. Moreover, the ministry launched a number of organic farmers' markets to not only help farmers sell their products but also to increase awareness among consumers about organic food. In these markets, consumers meet organic farmers and buy locally grown organic products. This helps build the markets and establish social networks: an important factor for local organic market development.

To meet the growing demand, the United Arab Emirates imports many products, which include a number of vegetables, fruit-like oranges, bananas, apples, kiwis, dairy products, and other processed products. Currently, no statistics are available about the organic food market, but a study conducted by the Ministry of Environment and Water (2013) showed that one retail store alone sold 300 tons of locally produced organic vegetables in four months.

Organic farmers' market: Locally produced organic vegetables

Regulation and standards

The UAE has produced regulations and standards equivalent to those used globally, to ensure that organic products (imported or produced locally) meet the international organic farming standards. It can be said that the UAE has fully implemented its organic farming regulations. In this regard, the MOEW is responsible for developing the regulation and standards while the Emirates Authority for Standardization & Metrology (ESMA) is responsible for inspection and certification. It is also important to mention that the UAE regulations aim to not hamper the development of the UAE organic farming sector but to regulate it.

The organic farming regulation and standards of the United Arab Emirates include:

- The UAE organic farming law / The Federal Law No (5) of the year 2009 on organic inputs and products. The law regulates the general principles of organic farming (definitions, role of the MOEW, inputs, products).
- The Ministerial Decision No. 84 of the year 2012 on the Executive By-Law of the Federal Law No. 5 of the year 2009 concerning organic inputs and products. This by-law identifies the practical principles that operators/operations shall take to convert to organic farming.
- Emirates Organic Foods Certification Scheme: Resolution Number (6) / Year 2012, Date 27/02/2012 on the Emirates Organic Foods Certification Scheme by Emirates Authority for Standardization & Metrology (ESMA). According to this resolution, ESMA is the national certifying body, and its certification scheme covers the following six categories:
    - Fresh/chilled/frozen fruits and vegetables
    - Canned food products
    - Fresh and canned juices
    - Meats and fish
    - Eggs
    - Milk, dairy products, and cheese.
    - Honey
- The Ministerial Decision No. 103 of the year 2012 on the UAE 'organic logo'. The logo is a distinctive mark for organic inputs and products. It was registered at the Ministry of Economy under number (82214) on 15/2/2012, category number 42. The organic logo shall be used according to the 'Federal Law No. 5 of the year 2009 and its executive by-law' on organic inputs and products.

The UAE organic farming logo

Capacity building and support programmes

The Ministry of Environment and Water runs an integrated training program on the basics of organic farming and organic farming techniques for farmers and agricultural extension workers. The programme includes different training topics: laws and regulations, soil fertility management, pest management, marketing, livestock production, and many other related topics. The Ministry of Environment and Water capacity building programmes also include training on vegetable packaging and labelling, public awareness, opening of farmers' organic markets, and helping farmers to participate in food exhibition events.

Asia: Current statistics

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

The area of organic agricultural land in Asia is slightly more than 3.2 million hectares, which is 0.2 percent of the total agricultural area in the region. Nine percent of the global organic agricultural land is in Asia. Compared with 2001 (300'000 hectares), the organic land has increased tenfold. Between 2011 and 2012, the organic area in Asia decreased by almost half a million hectares or ten percent; mainly due to a major loss of area reported by India (584'266 hectares less). The country with the largest organic agricultural area is China (1.9 million hectares), and the country with the most producers is India (600'000 producers). The countries with the highest share of organic agricultural land are Timor-Leste (6.6 percent) and Palestine (1.7 percent).

Land use

Land use details were available for two thirds of the organic agricultural area. In 2012, 40 percent of all organic farmland was used for arable crops (1.3 million hectares), 0.7 percent for grassland/grazing areas (22'000 hectares), and 18 percent (585'000 hectares) for permanent crops. Detailed information was not available for 40 percent of the agricultural land; so we can assume that each category has a far larger share of the total organic land than reported.

The key *arable crop* group is oilseeds, with 233'000 hectares reported in total. Most oilseeds were grown in China (150'000 hectares) and Kazakhstan (82'500 hectares). Cereals are also an important crop group grown on at least 187'000 hectares - mainly in Kazakhstan and Thailand. Big cereal producers, such as India, did not provide land use information in 2012, so it can be assumed that the total cereal area is larger than that shown in this report.

Organic coffee was grown on at least 60'000 hectares in 2012; with Indonesia and Timor-Leste as the key producing countries. Almost 18 percent of the organic farmland was used for *permanent crops*; most of this land used for tea (more than 80'000 hectares, mainly in China), coffee (60'000 hectares), and nuts (at least 41'000 hectares).

Market

Market data are not available for all countries, but we can assume that the market is continually growing. Nine countries provided retail sales values (Table 12, page 69). More information about the Asian market is available in the chapter about the global market from Amarjit Sahota (page 127).

For more information about the Asian figures see data tables for Asia, page 186.

[1] Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[2] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[3] Bernhard Schlatter, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

Organic Agriculture in Asia: Graphs

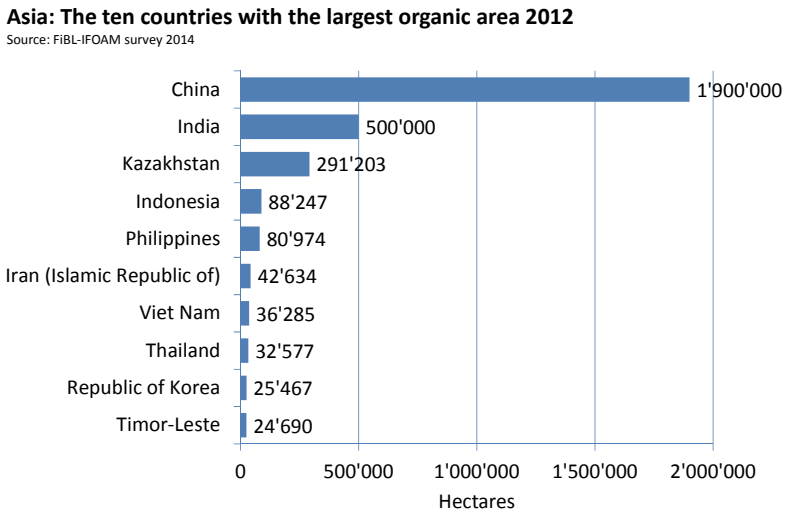


Figure 53: Asia: The ten countries with the largest organic agricultural land 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

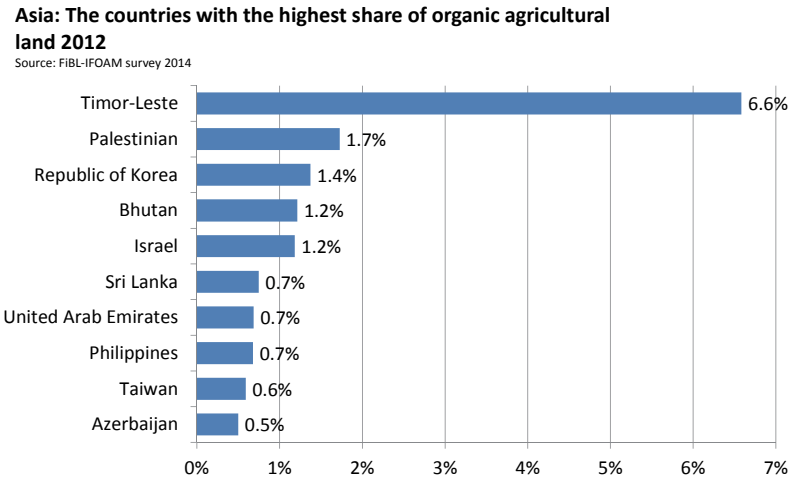


Figure 54: Asia: The ten countries with the highest share of organic agricultural land 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

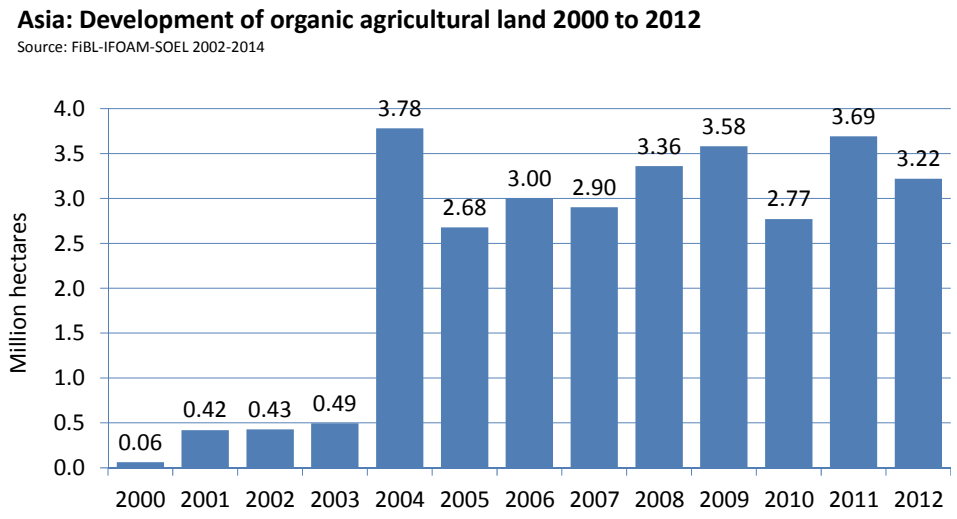


Figure 55: Asia: Development of organic agricultural land 2000 to 2012

Source: FiBL-IFOAM-SOEL survey 2002-2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

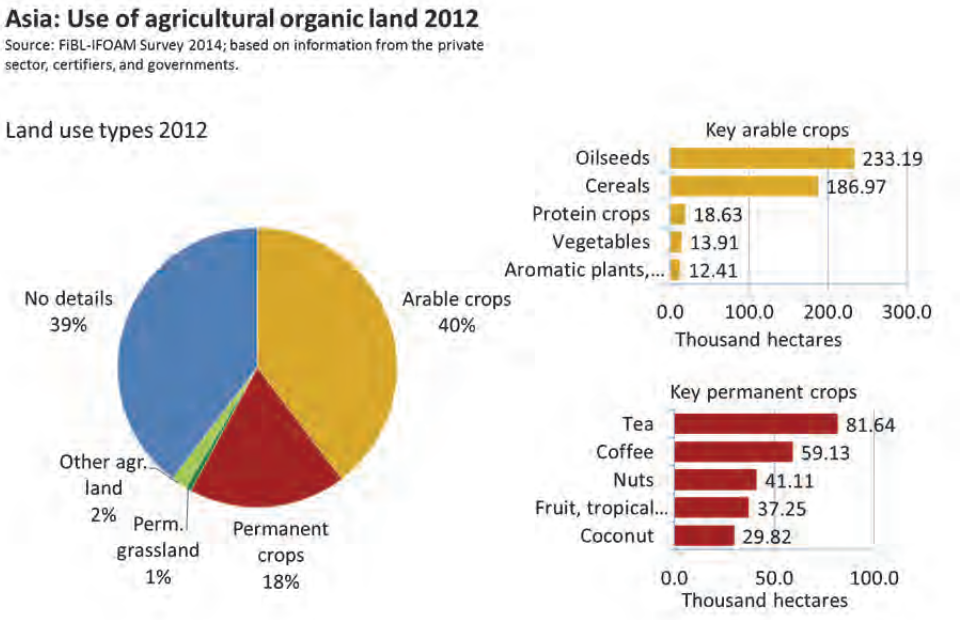


Figure 56: Asia: Use of organic agricultural land 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Organic Agriculture in Asia: Tables

Table 44: Asia: Organic agricultural land, share of total agricultural land and number of producers 2012

Country	Area [ha]	Share of total agr. land	Producers[1]
Afghanistan	61	0.0%	264
Armenia	810	0.0%	24
Azerbaijan	23'740	0.5%	297
Bangladesh	6'860	0.1%	9'337
Bhutan	6'156	1.2%	
Cambodia	9'055	0.2%	5'818
China	1'900'000	0.4%	
Georgia	1'999	0.1%	150
India	500'000	0.3%	600'000
Indonesia	88'247	0.2%	6'627
Iran (Islamic Republic of)	42'634	0.1%	6'100
Israel	6'187	1.2%	418
Japan	10'611	0.3%	2'130
Jordan	2'895	0.3%	98
Kazakhstan	291'203	0.1%	
Kyrgyzstan	2'696	0.0%	1'172
Lao People's Democratic Republic	5'990	0.3%	1'342
Lebanon	3'303	0.5%	181
Malaysia	603	0.0%	119
Myanmar	897	0.0%	15
Nepal	10'273	0.1%	247
Occupied Palestinian Territory	6'354	1.7%	832
Oman	38	0.0%	4
Pakistan	22'397	0.1%	105
Philippines	80'974	0.7%	3'008
Republic of Korea	25'467	1.4%	16'733
Saudi Arabia	13'569	0.0%	79
Sri Lanka	19'517	0.7%	404
Syrian Arab Republic	19'987	0.1%	2'458
Taiwan	5'016	0.6%	2'300
Tajikistan	12'659	0.3%	10'486
Thailand	32'577	0.2%	7'189
Timor-Leste	24'690	6.6%	72
United Arab Emirates	3'905	0.7%	34
Uzbekistan	213	0.0%	
Viet Nam	36'285	0.4%	6'829
Total	**3'217'867**	**0.2%**	**684'873**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

[1] Some countries report only the numbers of companies, projects or grower groups, which may each comprise a number of producers. See also explanations on page 60.

Table 45: Asia: All organic areas 2012

Country	Agri culture [ha]	Aqua culture [ha]	Forest [ha]	Wild collection [ha]	Total [ha]
Afghanistan	61				61
Armenia	810			11'050	11'860
Azerbaijan	23'740		123	919	24'782
Bangladesh	6'860	9'338			16'198
Bhutan	6'156			15'605	21'760
Cambodia	9'055			72	9'127
China	1'900'000			982'400	2'882'400
Georgia	1'999			1'405	3'405
India	500'000			4'700'000	5'200'000
Indonesia	88'247	94			88'341
Iran (Islamic Republic of)	42'634			38'035	80'669
Israel	6'187				6'187
Japan	10'611				10'611
Jordan	2'895				2'895
Kazakhstan	291'203			863	292'066
Kyrgyzstan	2'696				2'696
Lao (PDR)	5'990			16'786	22'776
Lebanon	3'303			1'686	4'989
Malaysia	603				603
Myanmar	897				897
Nepal	10'273			24'422	34'695
Occupied Palestinian Territory	6'354				6'354
Oman	38				38
Pakistan	22'397				22'397
Philippines	80'974				80'974
Republic of Korea	25'467				25'467
Saudi Arabia	13'569				13'569
Sri Lanka	19'517				19'517
Syrian Arab Republic	19'987			8'000	27'987
Taiwan	5'016				5'016
Tajikistan	12'659			1'055'890	1'068'549
Thailand	32'577	1'780		701	35'058
Timor-Leste	24'690				24'690
United Arab Emirates	3'905				3'905
Uzbekistan	213			5'000	5'213
Viet Nam	36'285	19'500		1'300	57'085
Total	**3'217'867**	**30'712**	**123**	**6'864'134**	**10'121'513**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Table 46: Asia: Land use in organic agriculture (fully converted and in-conversion) 2012

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		933'306
Arable crops	Arable crops, no details	794'862
	Arable crops, other	84
	Cereals	186'972
	Cultivated mushrooms	6
	Flowers and ornamental plants	18
	Green fodder from arable land	3'901
	Medicinal and aromatic plants	12'407
	Mushrooms and truffles	0.2
	Oilseeds	233'187
	Protein crops	18'633
	Root crops	1'487
	Seeds and seedlings	81
	Strawberries	11
	Sugarcane	11'803
	Textile crops	590
	Vegetables	13'912
Arable crops total		1'277'956
Cropland/crops, no details		339'071
Other agricultural land	Fallow land, crop rotation	57'810
	Home gardens	48
	Other agricultural land, no details	915
	Other agricultural land, other	1'096
	Unutilised land	27
Other agricultural land total		59'896
Permanent crops	Citrus fruit	576
	Cocoa	294
	Coconut	29'819
	Coffee	59'131
	Flowers and ornamental plants, permanent	23
	Fruit, no details	275'193
	Fruit, temperate	8'044
	Fruit, tropical and subtropical	37'251
	Grapes	8'544
	Medicinal and aromatic plants, permanent	20'161
	Nuts	41'111
	Olives	2'252
	Other permanent crops	21'731
	Tea/mate, etc.	81'643
Permanent crops total		585'773
Permanent grassland/grazing areas total		21'865
Total		**3'217'867**

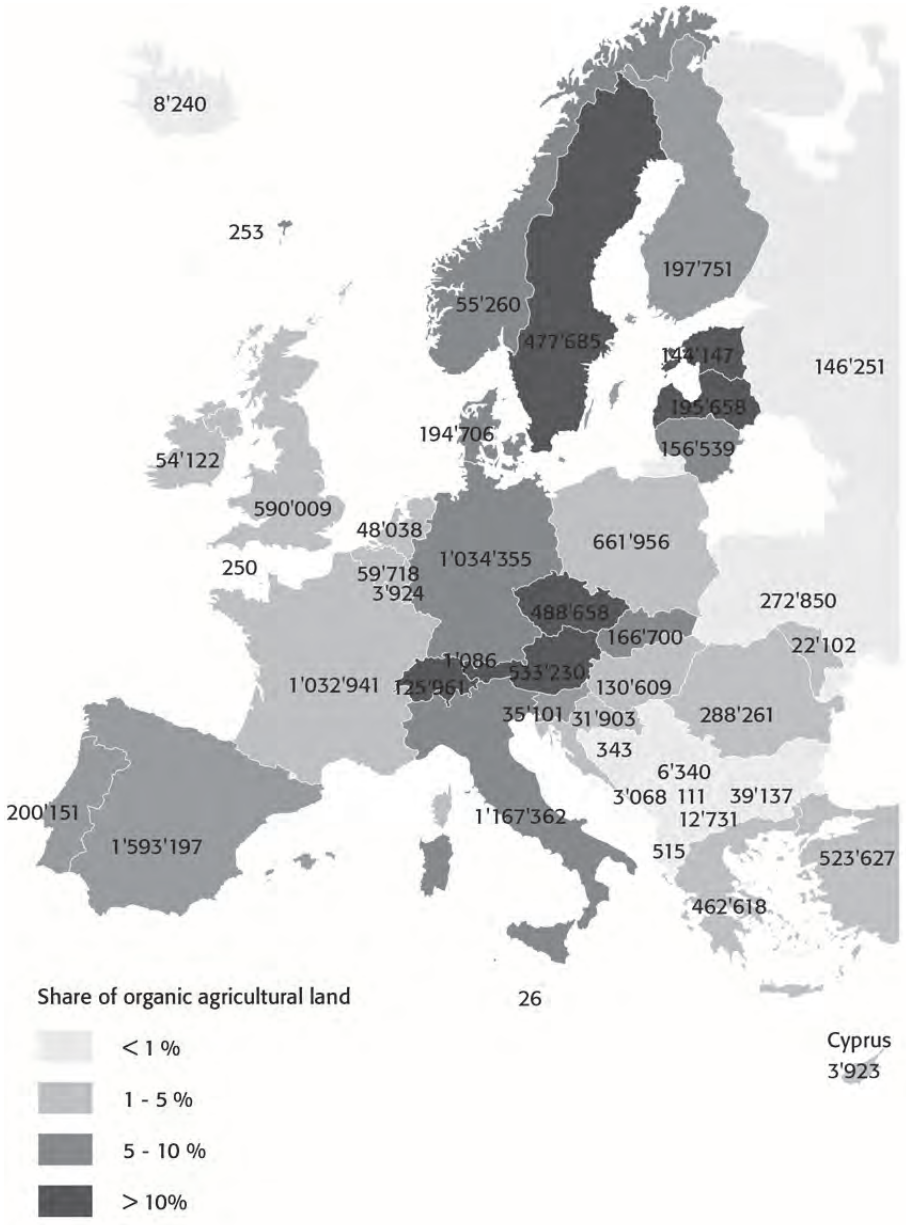
Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Table 47: Asia: Use of wild collection areas 2012

Use	Area [ha]
Beekeeping	12
Berries, wild	161
Fruit, wild	421
Nuts, wild	167
Palm sugar	72
Total	**6'864'134**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Europe



Map 4: Organic agricultural land in the countries of Europe 2012

Source: FiBL-AMI survey 2014; based on information from the private sector, certifiers, governments, Eurostat and the Mediterranean Organic Agriculture Network. For detailed data sources see annex, page 286.

Organic Farming in Europe

HELGA WILLER[1]

Current statistics

In 2012, the area of organic land, the number of organic farmers and the organic market continued to grow in Europe. In Europe, 11.2 million hectares (EU: 10 million), constituting 2.3 percent (EU: 5.6 percent) of the agricultural area, were under organic management in 2012, an increase of six percent compared with 2011. There were more than 320'000 producers (EU: more than 250'000). The value of the European organic market in 2012 was 22.8 billion euros (EU: 20.9), and the overall growth rate was approximately six percent. For details, see the chapter on European organic farming statistics (page 217) and the European market (page 207).

Review of the European political and legal framework for organic agriculture

In January 2013, the European Commission announced a public consultation for the review of the European policy on organic agriculture. All citizens, organizations, and public authorities who have an interest in a review of the European policy on organic agriculture were welcome to contribute to this consultation, which ran early 2013. The results were published in September 2013 (European Commission 2013). The online consultation, which took place in the first half of 2013, attracted major interest with close to 45'000 responses. The report highlights that consumers trust organic products (71 percent), that they buy them mainly out of concern about the environment (83 percent), and because they are free from GMOs and pesticide residues (81 percent). The vast majority of respondents (78 percent) also indicated that they were prepared to pay more for organic goods.

The report also shows a very strong demand for harmonized rules at the EU level, with 74 percent of all respondents requesting European organic standard to be strengthened and 86 percent wishing organic rules to be uniform across the EU. The results of the public consultation will feed the ongoing review of the political and legal framework for organic agriculture in Europe, with an overall strategy to be put forward in early 2014 (European Commission 2013).

EU regulation on organic farming

The European Directorate-General for Agriculture and Rural Development[2] is currently drafting a legal proposal for a new organic regulation to replace the current legal organic framework[3] to be published together with a new organic action plan in March 2014. An

[1] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[2] Directorate-General for Agriculture and Rural Development - http://ec.europa.eu/dgs/agriculture/index_en.htm
[3] Organic farming has had legal protection in the European Union since the beginning of the 1990s with Council Regulation (EEC) No 2092/91. On July 20, 2007, a completely revised organic regulation was published: Council Regulation (EC) No 834/2007 of 28 June 2007 on organic production and labelling of organic products and repealing regulation (EEC) No 2092/91, came into force on January 1, 2009.

inter-service consultation of the different Directorates of the European Commission is now assessing this proposal.

The European Union Group of the International Federation of Organic Agriculture Movements (IFOAM EU) (2014) believes that this opportunity must be used to bring the regulation and implementing rules up-to-date to match the dynamic developments of the sector and bridge the specific needs that have been identified. According to IFOAM EU, the current legislative framework provides a solid basis for organic production and consumer confidence; however, its implementation potential is not yet fully exploited. IFOAM EU, therefore, recommends a focused improvement of the existing framework. The most important points of improvement to the current legislative framework identified by IFOAM EU (2014) are:

Figure 57: European Union: Logo for organic products. The "Euro-leaf" design shows the EU stars in the shape of a leaf against a green background, conveying the message: Nature and Europe. The logo can be accompanied by national or private logos. Since July 1, 2010, the organic logo of the EU has been made mandatory on all pre-packaged organic products that were produced in any of the EU Member States and meet the necessary standards.

1) Increasing the effectiveness of controls of European and third country operators;
2) Moving to a '100% organic ingredients' approach (away from a '95% approach'), cutting the list of non-organic ingredients by half in organic processing and improving origin labelling;
3) Reducing exceptional rules and increasing transparency in the regulation using a step-by-step approach;
4) Introducing requirements for measuring environmental performance by organic processors and traders; and
5) Enabling group certification for small farmers in Europe.

Policy support

Since the beginning of the 1990s, support has been granted to organic farming under the European Union's agri-environmental programs (Pillar II of the CAP, rural development).[1] Discussions on the reform of policy for the period 2014 to 2020 have taken place over the last three years. New legislation was agreed by the European Commission, Parliament and Agricultural Ministers at the end of 2013.[2] The reform process has now shifted towards implementation of the legislation in the different Member States and the new policy is expected to come into force in 2015. The importance of using this CAP reform to transition EU agriculture towards a more sustainable path, with organic farming as a model approach, has been stressed by the

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

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

organic movement through IFOAM EU's advocacy work. Key outcomes for the movement have been the recognition of organic farming under direct payments and rural development programmes including higher investment support rates and EU co-financing as well as acknowledgement under quality schemes support and advisory services. The new reform also promotes innovation that seeks to move towards agro-ecological production approaches, whilst maintaining a legal minimum spending for environment measures that includes organic farming. At the same time the new CAP does not introduce a radical shift towards more sustainable farming systems with overall spending for rural development disproportionately cut compared to direct payments[1]. However the reform does mark the beginning of mainstreaming CAP payments towards better public good delivery and greater visibility of organic farming under that can help to promote its development to 2020 (Meredith *et al*., 2014).

Action plans

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

The European Action Plan for organic food and farming was launched in 2004. With the current review of the political and legal framework, it is envisaged that the European Commission will develop a new action plan. IFOAM EU (2014) calls for the action plan to be resolutely implemented and to provide political and financial measures for organic research and innovation, education and training, information, and promotion.

Research

Today, organic farming research is substantially funded under national research programs or national organic action plans, as well as through European projects.[2] Even though no figures for all European countries are available, it is known that the funds of the eleven countries that are part of the ERA-Net[3] project CORE Organic[1] amounted to more than 60 million euros in 2006 (Lange et al. 2007). Newer data are not available.

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

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

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

Several organic farming research projects have been funded under the framework programs of the European Commission since the mid-1990s. Furthermore, there are several European projects that do not have organic farming as their focus but carry out research related to organic farming. In the Seventh Framework Programme for Research and Technological Development, launched in 2008, ten funded projects are focusing or focused on organic farming. The following projects are ongoing:

- IMPRO: Impact matrix analysis and cost-benefit calculations to improve management practices regarding health status in organic dairy farming (2012-2016), www.impro-dairy.eu
- OSCAR: Optimising Subsidiary Crop Applications in Rotations (2012-2016), web3.wzw.tum.de/oscar
- OrganicDataNetwork: Data network for better European organic market information (2012-2014), www.organicdatanetwork.net
- Co-Free: Innovative strategies for copper-free low input and organic farming systems (starting 2012), www.co-free.eu
- SOILIBAM: Strategies for organic and low-input integrated breeding and management (2012-2014), www.solibam.eu
- LowInputBreeds: Development of integrated livestock breeding and management strategies to improve animal health, product quality and performance in European organic and "low input" milk, meat and egg production (2009-2014); www.lowinputbreeds.org
- CORE Organic Plus - Coordination of European Transnational Research in Organic Food and Farming Systems (2014-2016), www.coreorganic.org

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

The European Technology Platform for Organic Food and Farming Research (TP Organics, www.tporganics.eu), which was founded in 2008, joins the efforts of industry and civil society in defining organic research priorities and defending them vis-à-vis policy-makers.[2] In July 2013, TP Organics was granted official "technology platform" status by the European Commission; this status is reserved for outstanding European technology

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

[2] The TP Organic vision paper, published in December 2008, reveals the huge potential of organic food production to mitigate major global problems, from climate change and food security, to the whole range of socio-economic challenges in the rural areas (Niggli et al. 2008). In February 2010, the Strategic Research

platforms (ETPs).[1] ETPs are explicitly mentioned as stakeholders to be consulted on EU research priorities in the context of the European Innovation Partnerships and play a considerable role in setting priorities for Horizon 2020, the next EU framework programme for research running from 2014 to 2020.

Progress of the OrganicDataNetwork project

In January 2012, the European research project OrganicDataNetwork (Data network for better European organic market information, www.organicdatanetwork.net) started. The project aims to increase the transparency of the European organic food market through better availability of market information about the sector, meeting the needs of the policy makers and actors involved in organic markets. The partnership acts also as a coordinating centre between stakeholders and strives to establish a permanent network to achieve collaboration on statistical issues related to organic market data. The project has achieved a number of results so far, including a classification of data collection methods (Hamm and Feldmann 2013), an inventory of data collecting and publishing institutions (Gerrard et al. 2012), a report on data demand by end users (Home et al. 2012) and a compilation of key market data (Willer and Schaack 2013).

Based on the results of the first Organic Data Network workshop and the discussions on the Organic Data Forum with all involved stakeholders, the OrganicDataNetwork project issued a statement on data collection and made a number of suggestions on how data collection could be improved in the context of the current review of the political and legal framework for organic production. The full OrganicDataNetwork statement can be viewed on page 200.

Current project activities include case studies in six different countries/regions: Germany, France, United Kingdom (UK), Czech Republic, Italy, and a group of non-EU Mediterranean countries. These case studies primarily aim to produce new/improved organic market reports by using quality checks developed in the project, and by exchanging experiences among the countries under study. The case studies will also produce a collection of methods and 'lessons learned' during the process, which then can be shared or applied Europe-wide.

In 2014, the project will also be engaged in preparing the Code of Practice for the initiation and maintenance of good organic market data collection and publication

Agenda (SRA), the second major document of the Technology Platform TP Organics (www.tporganics.eu) was finalized, underlining research priorities and a number of suggestions for research projects (Schmid et al. 2009). The Implementation Action Plan explains how the research priorities and research topics, identified in the Strategic Research Agenda, can be implemented. A focus is laid on funding instruments, research methods, and communication of results (Padel et al. 2010). Many of the topics covered in these documents were taken into consideration in recent European calls.

[1] More information is available at http://www.ifoam-eu.org/en/news/2013/07/17/organic-research-and-innovation-platform-tp-organics-officially-recognized-european

procedures (OrMaCode). The Code of Practice will cover different key areas of organic market data collection, processing, storage, and publication/dissemination.

Successful policy work of IFOAM EU

The European Union Group of the International Federation of Organic Agriculture Movements (IFOAM EU) can look back on another year of successful policy work. The activities of the group that focus on regulation, agricultural policy and research are very well documented in its monthly newsletter.[1] In 2013, IFOAM EU celebrated its 10th anniversary.

Key policy work for 2013 has concentrated on the CAP reform process 2014-2020, prospective revisions to the EU organic regulation, and the development of a new EU Organic Action Plan (as outlined above). Other important work has been taking place with regard to the ongoing discussions on the marketing of seed and plant propagating materials as well as the organic control system.[2] A major project in 2013 was the 'Mind the CAP' campaign,[3] which seeks to raise awareness and increase understanding of the Common Agricultural Policy (CAP) among farmers and citizens from the perspective of the organic movement. Activities and events are organised by the IFOAM EU Group and partners seeking to explore the CAP 2014-2020 and the potential contribution of organic food and farming systems to the CAP reform process and new rural development programming. A major outcome of the project was the publication of "Organic in Europe: Prospects and Developments". This book provides an overview of the latest trends in European organic farming and market development and includes reports about organic farming from more than 20 European countries (Meredith & Willer 2014). Other activities organised by IFOAM EU included the 7th European Organic Congress[4] on the impact of EU regulatory framework under the new CAP reform and the launch of an Organic Vision for 2030 in Brussels in November 2013.[5]

Further reading

Council Regulation (EC) No 834/2007 of 28 June 2007 on organic production and labelling of organic products and repealing Regulation (EEC) No 2092/91 http://eurlex.europa.eu/LexUriServ/site/en/oj/2007/l_189/l_18920070720en00010023.pdf

European Commission (2013): Report on the results of the Public consultation on organic farming. European Commission, Brussels http://ec.europa.eu/agriculture/organic/files/eu-policy/of_public_consultation_final_report_en.pdf

European Commission, Directorate General for Research and Innovation (2012): A decade of EU-funded, low-input and organic agriculture research. European Commission, Brussels, available at http://ec.europa.eu/research/bioeconomy/pdf/189756_2011_2695_a_decade_of_eu_en.pdf

[1] The newsletter of the IFOAM EU Group is available at http://www.ifoam.org/about_ifoam/around_world/eu_group-new/positions/newsletters/newsletters.php

[2] For more information on IFOAM EU's advocacy works is available: http://www.ifoam-eu.org/en/library/position-papers

[3] More information about the Mind the Cap campaign is available at http://www.ifoam-eu.org/en/mind-cap/mind-cap-campaign

[4] Proceedings of the European Organic Congress held in Lithuania in July 2013 is available at: http://www.organic-congress-ifoameu.org/

[5] More information on the launch of an Organic Vision for 2030 in Brussels in November is available at: http://www.ifoam-eu.org/en/making-europe-more-organic/organic-vision-2030-build-european-organic-future

Feldmann, Corinna and Hamm, Ulrich (2013) Classification of data collection methods (= Deliverable 3.1 of the OrganicDataNetwork project - Report on collection methods). OrganicDataNetwork project, c/o University of Ancona, Italy. http://orgprints.org/23010/

Gerrard, Catherine L; Vieweger, Anja and Padel, Susanne (2012) Inventory of data collecting and publishing institutions(= Deliverable 2.1 of the OrganicDataNetwork project: Report on data collectors). OrganicDataNetwork project, c/o University of Ancona. http://orgprints.org/23009/

Home, Robert; Lošťák, Michal and Stolze, Matthias (2013) Report on the demand for data by end users of organic market data (= Deliverable 1.1 of the OrganicDataNetwork project. Survey of the organic market data needs of end users). OrganicDataNetwork project, c/o University of Ancona http://orgprints.org/23008/

IFOAM EU (2014): IFOAM EU press statement. IFOAM EU position on the organic regulation review. Press release of IFOAM EU, Brussels, January 14, 2014

Meredith, Stephen and Helga Willer (Eds.) (2014): Organic in Europe. Prospects and Developments. IFOAM EU Group, Brussels

Niggli, Urs; Slabe, Anamarija; Schmid, Otto; Halberg, Niels und Schluter, Marco (2008) Vision for an Organic Food and Farming Research Agenda 2025. Organic Knowledge for the Future. Technology Platform Organics, Brussels. Archived at http://orgprints.org/13439/

Padel, Susanne; Niggli, Urs; Pearce, Bruce; Schlüter, Marco; Schmid, Otto; Cuoco, Eduardo; Willer, Helga; Huber, Machteld; Halberg, Niels and Micheloni, Cristina (2010) Implementation Action Plan for organic food and farming research. Technology Platform TP Organics, Brussels

Sanders, Jürn and Otto Schmid (2014): Organic action plans: Mainstreaming organic farming in public policy. In: Meredith, Stephen and Helga Willer (Eds.) (2014): Organic in Europe. Prospects and Developments. IFOAM EU Group, Brussels

Schaack, Diana et al. (2013): Development of the Organic Market in Europe. In: Willer, Helga, Julia Lernoud and Kilcher, Lukas (Eds.) (2013) The World of Organic Agriculture - Statistics and Emerging Trends 2013. IFOAM, Bonn; FiBL, Frick

Willer, Helga and Schaack, Diana (2013) Intermediate report on compilation of key organic market data = Deliverable 4.2 of the OrganicDataNetwork project. Research Institute of Organic Agriculture (FiBL), Frick, Switzerland. http://orgprints.org/23157/

Willer, Helga, Marie Reine Bteich and Stephen Meredith (2014): Country reports. In Meredith, Stephen and Helga Willer (Eds.) (2014): Organic in Europe. Prospects and Developments. IFOAM EU Group, Brussels

Websites

ec.europa.eu/agriculture/cap-post-2013 : Webpages of the European Commission on the CAP reform

www.ifoam-eu.org: European Union Group of the International Federation of Organic Agriculture Movements - IFOAM EU Group

www.ifoam.org: International Federation of Organic Agriculture Movements (IFOAM)

europa.eu.int/comm/agriculture/qual/organic/index_en.htm: The European Commission's organic farming website

ec.europa.eu/Eurostat: Eurostat: Organic farming data: ec.europa.eu/eurostat > Statistics > Statistics A-Z > Agriculture > Data > Main tables > Organic Farming

www.fibl.org: FiBL – Research Institute of Organic Agriculture

www.organic-congress-ifoameu.org: Website of the organic congresses of the IFOAM EU Group

www.organic-europe.net: Organic Europe, maintained by FiBL: Country reports, address database, statistics

www.organic-market.info: Organic Market Info: Market News and updates: www.organic-market.info

www.organic-world.net: Organic World (maintained by FiBL): Statistics, country information, news

www.tporganics.eu: Technology Platform TP Organics

Europe: Current Statistics[1]

HELGA WILLER[2], DIANA SCHAACK[3], BERNHARD SCHLATTER[4], JULIA LERNOUD[5]

Agricultural land

In *Europe,* 11.2 million hectares were under organic agricultural management, constituting 2.2 percent of the agricultural area. Compared with 2003 (6.3 million hectares), the organic land has almost doubled. In 2012, the area increased by 0.63 million hectares or six percent.

In the countries of the *European Union*, there were almost 10 million hectares in 2012, constituting 5.6 percent of the agricultural land. Compared with 2003 (5.7 million hectares), the organic land increased by 75 percent. In 2012, the area increased by 0.54 million hectares or six percent.

The country with the largest organic agricultural area is Spain (1.6 million hectares), followed by Italy (1.2 million hectares), Germany and France (both slightly over 1 million hectares). For more information about the European figures, see data tables for Europe, page 204.

Land use

In 2012, 42 percent of the organic farmland was used for arable crops (4.7 million hectares), and 44 percent was grassland/grazing areas (4.9 million hectares), with ten percent (1.1 million hectares) being used to grow permanent crops (Table 49).

Regarding permanent grassland/grazing land, which increased by three percent from 2012, the countries with the largest areas were Spain (0.85 million hectares), Germany (0.58 million hectares) and the United Kingdom (0.41 million hectares). To convert extensively used areas and grassland to organic farming requires relatively few changes in production and few investments.

The largest arable crop areas, which increased by seven percent compared with 2011, were in Italy (0.53 million hectares), followed by France (0.52 million hectares) and Germany (0.43 million hectares). The key arable crop group after green fodder from arable land (almost 2 million hectares) was cereals; forty percent of the arable land is for cereal production, amounting to 1.9 million hectares in total: an increase of six percent compared with 2011. The largest cereal areas are in Italy (more than 210'000), Germany (202'000 hectares), Turkey (198'00 hectares), and Spain (174'000 hectares). Organic vegetables were grown on 116'000 hectares in 2012, with Italy (21'000 hectares), France (13'600 hectares), the United Kingdom (10'700 hectares), and Germany (10'600 hectares) as the key producing countries.

[1] Some work for this publication was undertaken as part of the research project titled "Data network for better European organic market information" (OrganicDataNetwork). This project has received funding from the European Union's Seventh Framework Programme for research, technological development and demonstration under grant agreement no 289376. The opinions expressed in this contribution are those of the authors and do not necessarily represent the views of the European Commission.
[2] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[3] Diana Schaack, Agrarmarkt Informations-Gesellschaft mbH, Bonn, Germany, www.ami-informiert.de
[4] Bernhard Schlatter, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[5] Julia Lernoud, Research Institute of Organic Agriculture (FiBL),, Frick, Switzerland, www.fibl.org

Ten percent of the organic farmland was used for permanent crops, and the permanent crop area increased by four percent compared with 2011. The countries with the largest permanent crop areas are Spain (360'000 hectares), Italy (306'000 hectares) and France (89'000 hectares). Compared with 2011 a large part of the permanent cropland was used for olives (460'000 hectares; +9 percent), grapes (241'000 hectares; +4.5 percent), and nuts (172'000 hectares; -7 percent).

It should be noted that, in addition to the agricultural land, there are 10.7 million hectares of wild collection areas. A large part of this area is in Finland (7 million hectares), where wild berries are collected.

Organic producers and further operator types

In 2012, there were more than 320'000 producers in Europe (EU: more than 250'000). Since 2003, the number of producers has almost doubled (EU: increase by 80 percent). The country with the most producers is Turkey (more than 57'000), followed by Italy (almost 44'000) and Spain (more than 30'000).

In Europe, there were almost 40'000 processors in 2012. It should be noted, however, that countries that have a large organic market and well-developed processing facilities, such as Austria and Switzerland, do not have data on the number of organic processors in their countries. According to available data, an overwhelming number of processors (almost 37'000) are in the countries that joined the European Union before 2004. In the new member states, there were only 1'900 processors. These figures, though far less complete than the producer data, clearly show that the processing infrastructure in is not yet well developed in many countries.

In the European Union (EU), almost 1'500 importers were counted in 2012 (1'600 in Europe). Of the entities in the EU, more than 90 percent were in the old member states, showing the importance of imports in these countries, most of which have well developed markets.

Market

In 2012, the organic market continued to grow in Europe. The total value of the European organic market in 2012 was approximately 22.8 billion euros (EU: 20.9 billion euros). The largest markets were Germany, France, the UK, and Italy. The countries with the highest per capita spending were Switzerland, Denmark, and Luxembourg. For more information about the European market, see separate chapter by Schaack et al. on page 215.

Further reading

Willer, Helga, Diana Schaack and Marie Reine Bteich (2014): Growth Trends in European Organic Food and Agriculture. In: Meredith, Stephen and Helga Willer (Eds.) 2014: Organic in Europe. Prospects and Developments. IFOAM EU Group, Brussels

Organic Agriculture in Europe: Graphs

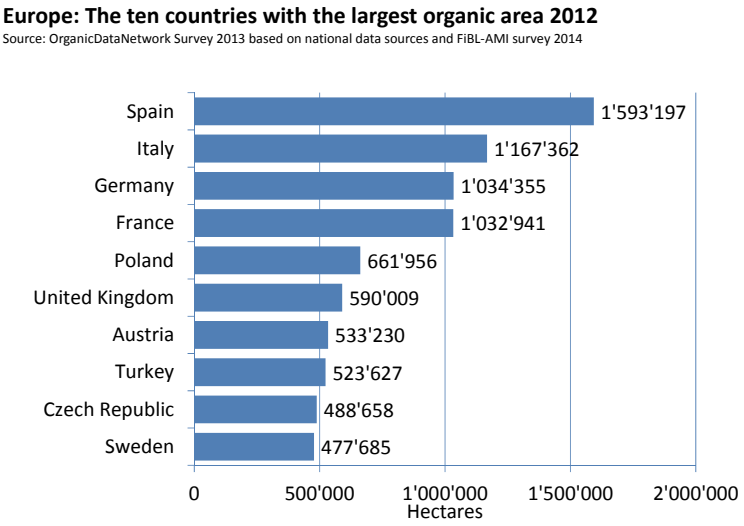


Figure 58: Europe: The ten countries with the largest area of organic agricultural land 2012

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2014 based on Eurostat and national data sources. For data sources see annex, page 286

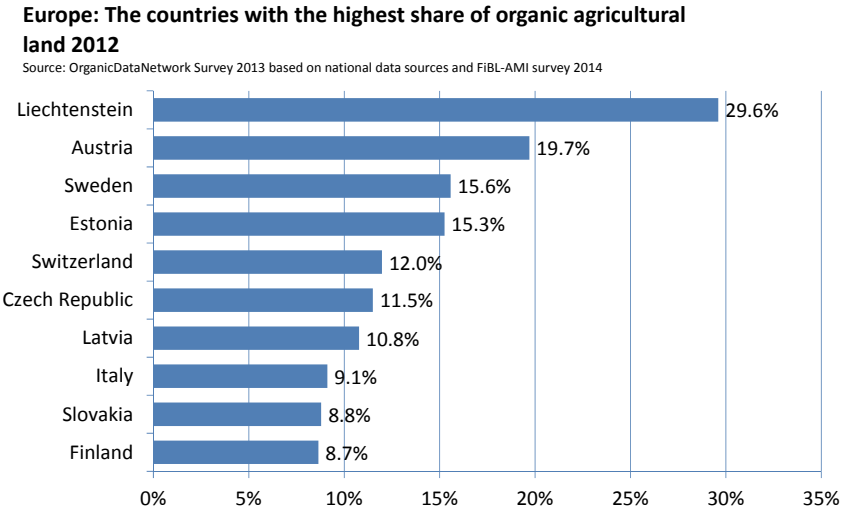


Figure 59: Europe: The ten countries with the highest shares of organic agricultural land 2012

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2014 based on Eurostat and national data sources For data sources see annex, page 286

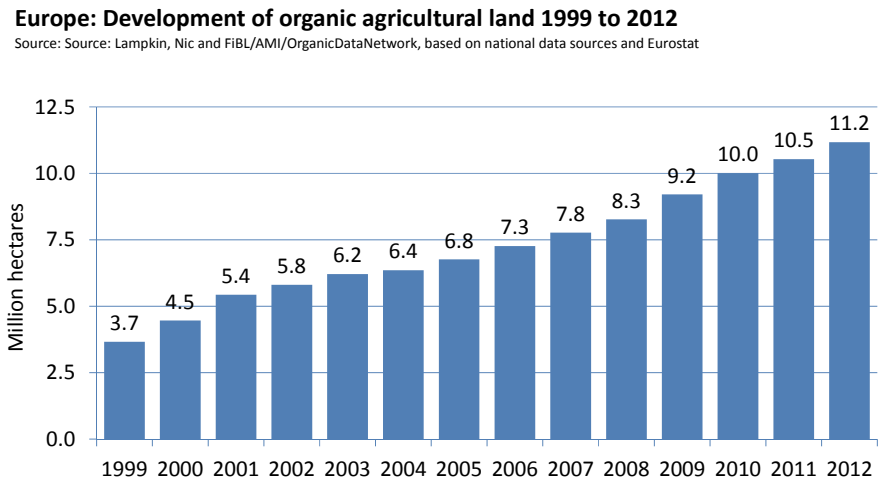


Figure 60: Europe: Development of organic agricultural land 1999-2012

Source: Lampkin, Nic and FiBL/AMI/OrganicDataNetwork, based on national data sources and Eurostat. For data sources see annex, page 286.

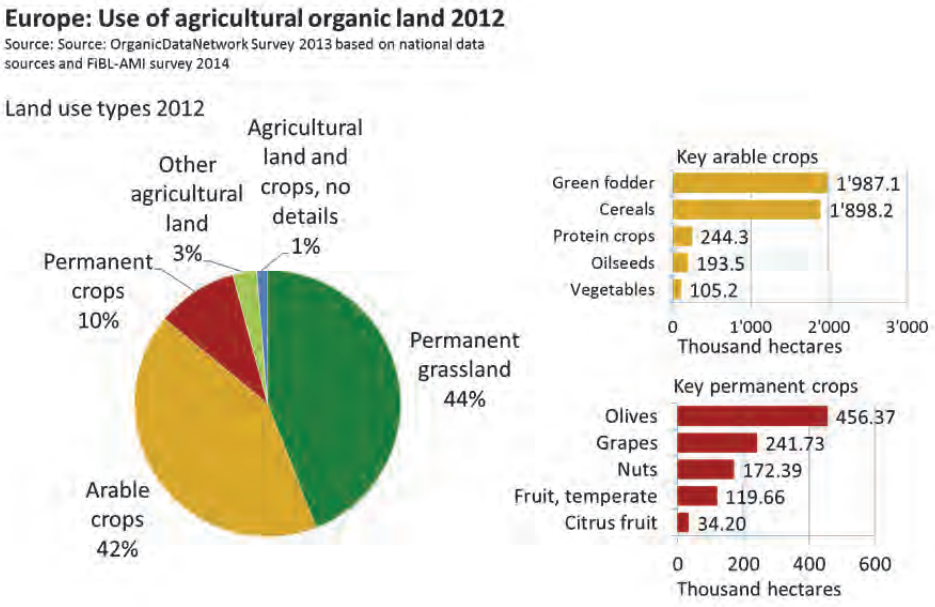


Figure 61: Europe: Use of agricultural land 2012

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2014 based on Eurostat and national data sources. For data sources see annex, page 286

Organic Agriculture in Europe: Tables

Table 48: Europe: Organic agricultural land, share of total farmland, and producers 2012

Country	Area [ha]	Share of all agr. land	Producers
Albania	515	0.0%	46
Austria	533'230	19.7%	21'843
Belarus (Wild collection only)		0.0%	
Belgium	59'718	4.4%	1'413
Bosnia and Herzegovina (2011)	343	0.0%	25
Bulgaria	39'137	1.3%	2'754
Channel Islands (2011)	250	2.8%	
Croatia	31'903	2.4%	1'528
Cyprus	3'923	2.7%	719
Czech Republic	488'658	11.5%	3'934
Denmark	194'706	7.4%	2'651
Estonia	144'147	15.3%	1'478
Faroe Islands	253	8.4%	1
Finland	197'751	8.7%	4'322
France	1'032'941	3.8%	24'425
Germany	1'034'355	6.2%	23'032
Greece	462'618	5.6%	23'433
Hungary	130'609	3.1%	1'560
Iceland	8'240	0.4%	35
Ireland (2011)	54'122	1.3%	1'400
Italy	1'167'362	9.1%	43'852
Kosovo	111	0.0%	
Latvia	195'658	10.8%	3'496
Liechtenstein	1'086	29.6%	35
Lithuania	156'539	5.4%	2'527
Luxembourg	3'924	3.0%	102
Macedonia FYROM	12'731	1.2%	555
Malta	26	0.2%	9
Moldova (2011)	22'102	0.9%	172
Montenegro (2011)	3'068	0.6%	62
Netherlands	48'038	2.5%	1'646
Norway	55'260	5.1%	2'590
Poland	661'956	4.3%	25'944
Portugal (2011)	200'151	6.0%	2'603
Romania	288'261	2.1%	15'315
Russian Federation	146'251	0.1%	60
Serbia	6'340	0.1%	1'073
Slovakia	166'700	8.8%	365
Slovenia	35'101	7.6%	2'682
Spain	1'593'197	6.4%	30'462
Sweden	477'685	15.6%	5'601
Switzerland	125'961	12.0%	6'173
Turkey	523'627	2.2%	57'259
Ukraine	272'850	0.7%	164
United Kingdom	590'009	3.4%	4'281
Total Europe	11'171'413	2.3%	321'630
European Union	9'992'425	5.6%	253'377

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2014 based on Eurostat and national data sources. For data sources see annex, page 286

Table 49: Europe: Land use in organic agriculture 2011 and 2012

Land use	Crop group	2011	2012
Arable crops	Arable crops, no details	86'790	78'474
	Cereals	1'780'059	1'898'248
	Cultivated mushrooms	253	302
	Flowers and ornamental plants	244	9'594
	Green fodder from arable land	1'816'686	1'987'063
	Hops	238	192
	Industrial crops	8'847	6'736
	Medicinal and aromatic plants	46'657	32'367
	Mushrooms and truffles	173	
	Oilseeds	190'487	193'504
	Protein crops	233'299	244'260
	Root crops	43'932	45'803
	Seeds and seedlings	3'803	3'720
	Strawberries	2'811	2'966
	Textile crops	18'638	13'386
	Tobacco	118	914
	Vegetables	109'409	105'154
	Other arable crops	40'675	59'714
Arable crops, all		4'383'121	4'682'398
Permanent crops	Berries	28'278	28'205
	Citrus fruit	30'415	34'196
	Flowers and ornamental plants, permanent	15	13
	Fruit	6'471	6'648
	Fruit, temperate	114'107	119'660
	Fruit, tropical and subtropical	18'859	16'390
	Fruit/nuts/berries	1'032	7'583
	Grapes	231'212	241'732
	Medicinal and aromatic plants, permanent	1'636	1'626
	Nurseries	459	82
	Nuts	185'014	172'395
	Olives	418'006	456'373
	Other permanent crops	17'986	12'025
	Tea/mate, etc.		175
Permanent crops, all		1'053'490	1'097'101
Permanent grassland/grazing areas		*4'769'978*	*4'919'765*
Cropland, no details		*3'693*	*2'013*
Other agricultural land		*301'261*	*324'409*
Agr. land, no details		*24'007*	*145'727*
Total		10'535'550	11'171'413

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2014 based on Eurostat and national data sources. For data sources see annex, page 286

Table 50: Europe: All organic areas 2012

Country	Agricultural land [ha]	Wild collection [ha]	Other non agr. land [ha]	Forest [ha]	Grazed non agr.land [ha]	Total
Albania	515	467'783				468'298
Austria	533'230					533'230
Belarus		2'742				2'742
Belgium	59'718					59'718
Bosnia and Herzegovina	343	78'550				78'893
Bulgaria	39'137	473'941				513'078
Channel Islands	250					250
Croatia	31'903		0	69		31'973
Cyprus	3'923					3'923
Czech Republic	488'658					488'658
Denmark	194'706					194'706
Estonia	144'147	129'212				273'359
Faroe Islands	253					253
Finland	197'751	7'007'363				7'205'114
France	1'032'941	3'380				1'036'322
Germany	1'034'355					1'034'355
Greece	462'618					462'618
Hungary	130'609					130'609
Iceland	8'240	212'436				220'676
Ireland	54'122					54'122
Italy	1'167'362	17'988	70			1'185'420
Kosovo	111					111
Latvia	195'658					195'658
Liechtenstein	1'086		2			1'088
Lithuania	156'539					156'539
Luxembourg	3'924					3'924
Malta	26					26
Macedonia, FYROM	12'731	194'000				206'731
Moldova	22'102					22'102
Montenegro	3'068	139'809				142'877
Netherlands	48'038					48'038
Norway	55'260					55'260
Poland	661'956					661'956
Portugal	200'151			19'533		219'684
Romania	288'261	1'082'138				1'370'399
Russian Federation	146'251	20'646				166'897
San Marino						
Serbia	6'340		80			6'420
Slovakia	166'700					166'700
Slovenia	35'101					35'101
Spain	1'593'197					1'593'197
Sweden	477'685					477'685
Switzerland	125'961				6'121	132'082
Turkey	523'627	535'317				1'058'944
Ukraine	272'850	330'000				602'850
UK	590'009		8'174	7'446		605'629
Europe	11'171'413	10'695'304	8'326	27'048	6'121	21'908'211
European Union	9'992'425	8'714'022	8'244	27'048		18'741'738

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2014 based on Eurostat and national data sources For data sources see annex, page 286

The Organic Market in Europe 2012[1]

DIANA SCHAACK[2], JULIA LERNOUD[3], BERNHARD SCHLATTER[4] AND HELGA WILLER[5]

In 2012, the organic market continued to grow in the European Union, even though some countries were still affected by the economic crisis, leading to stagnation or even decline. According to data provided by the EU-funded project OrganicDataNetwork (www.organicdatanetwork.net), the organic market in Europe increased by approximately 6 percent in 2012. It now amounts to approximately 22.8 billion euros (European Union: 20.9 billion euros). Germany, the largest market, had a growth rate of 6 percent. Some countries like Denmark, Ireland, and Sweden showed stagnation; others showed strong growth, such as Finland (+24 percent), Norway (+17 percent), the Netherlands (+14 percent). In contrast, retail sales decreased for the fourth consecutive year in the UK (-1.5 %), but a return to growth was noted in 2013. In Greece, the market declined substantially in 2013 due to the economic crisis; however, data is not available.

Germany, the largest market in Europe, had retail sales of 7.04 billion euros, and France held second place with 4.0 billion euros– a market that has shown very dynamic growth in the past couple of years. The UK was in third place (1.95 billion euros), followed by Italy (1.89 billion euros) (Figure 62). As in recent years, the highest market shares were reached in Denmark (7.6 percent), Austria (6.5 percent), and Switzerland (6.3 percent) (Figure 65). The highest per capita consumption of organic food in 2012 was in Switzerland (189 euros), Denmark (159 euros), and Luxembourg (143 euros). However, care must be taken in interpreting these figures as the costs of living differ quite considerably between countries (Table 51).

In 2013, in many European countries the market experienced further significant growth, and growth rates were similar to those in 2012 (final figures are expected to be available by mid of 2014). Consumer interest in organic products remains high, even though they increasingly have to compete with other sustainability and regional labels. In spite of the difficult economic climate in some European countries where market shares are still low, consumer concern about the way food is produced is increasing. The European Union (20.9 billion euros) is the second largest single organic market in the world after the United States (22.6 billion euros). A comparison of the 2012 data for the whole of Europe (22.8 billion euros in 2012) and North America (24.1 billion euros in 2012) shows that North America has the lead (see also chapter on global organic statistics page 34).

[1] Some work for this publication was undertaken as part of the research project titled "Data network for better European organic market information" (OrganicDataNetwork). This project has received funding from the European Union's Seventh Framework Programme for research, technological development and demonstration under grant agreement no 289376. The opinions expressed in this contribution are those of the authors and do not necessarily represent the views of the European Commission.
[2] Diana Schaack, Agrarmarkt Informations-Gesellschaft mbH, Bonn, Germany, www.ami-informiert.de
[3] Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[4] Bernhard Schlatter, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[5] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

Within the overall organic market in Europe, certain organic products are more dominant than others. A 2013 survey carried out as part of the OrganicDataNetwork (Willer and Schaack, 2013) produced the following results:

Fruit and vegetables are the pioneering organic products in Europe. They now have shares of between one third and one fifth of many national organic markets. They are especially strong in Italy, Ireland, Norway, Sweden, and Germany. All over Europe, the organic market is dominated by fresh products compared to the conventional markets.

In many countries and in Northern Europe in particular, animal products, especially milk and dairy products, make up a high share of all organic products sold. Meat and meat products are very successful, with market shares of around 10 percent in Belgium, the Netherlands, Finland, and France. On the other hand, in many countries, the meat and meat-based product market is not yet well developed, due to lack of manufacturing capacities and high price premiums compared to conventional products.

Beverages – mainly wine – constitute an important part of the organic markets – nearly 15 percent in France and Croatia. Hot beverages (e.g. coffee, tea, and cocoa) make up 3 to 5 percent of the organic market. Milled cereal products, which are easily sold and stored in the supermarkets, achieve high shares in the Czech Republic, Finland and Norway. Bread and bakery products are very important in the organic product range, with around 10 % of the market, in Switzerland, the Netherlands, France, Sweden, Finland, and Germany.

When comparing the market shares of organic products within the total market one of the success stories in many European countries are eggs. According to the OrganicDataNetwork survey, organic eggs have market shares of up to 20 percent in Switzerland, and around 10 percent in most of the countries for which data was available. Sales of eggs reflect the high concerns of consumers with regards to animal welfare and also their readiness to pay relatively high price premiums. In Germany, for example, organic eggs are at least double the price of conventional eggs – one of the highest price differentials to be found within organic product groups.

- After eggs, vegetables enjoy the highest market shares (in value), with organic accounting for 8 to 12 percent of all vegetables sold in Switzerland, Austria and Germany.
- In many countries, organic dairy products achieve market shares of about 5 percent of all dairy products sold. In Switzerland, the figure is even 10 percent.
- Single products, such as organic baby food and meat substitutes, often achieve high shares of the total market in many European countries. Fresh carrots have a 30 percent market share in Germany.
- On the other hand, products like beverages and meat (especially poultry) generally have low market shares due to high price premiums compared to conventional products (Willer and Schaack, 2013).

References

Schaack, Diana; Lernoud, Julia; Padel, Susanne and Willer, Helga (2013) The Organic Market in Europe 2011 - Nine Percent Increase Compared with 2010. In: Willer, Helga; Lernoud, Julia and Kilcher, Lukas (Eds.) The World of Organic Agriculture - Statistics and Emerging Trends 2013. Research Institute of Organic Agriculture

(FiBL) and International Federation of Organic Agriculture Movements (IFOAM), Frick and Bonn, pp. 224-229. http://orgprints.org/23194/

Willer, Helga and Schaack, Diana (2013) Intermediate report on compilation of key organic market data = Deliverable 4.2 of the OrganicDataNetwork project. FiBL, Frick, Switzerland

Willer, Helga, Schaack Diana and Marie-Reine Bteich (2014) Growth Trends in European Organic Food and Agriculture. In: Meredith Stephen and Helga Willer (2014): Organic in Europe. IFOAM EU Group, Brussels

Graphs

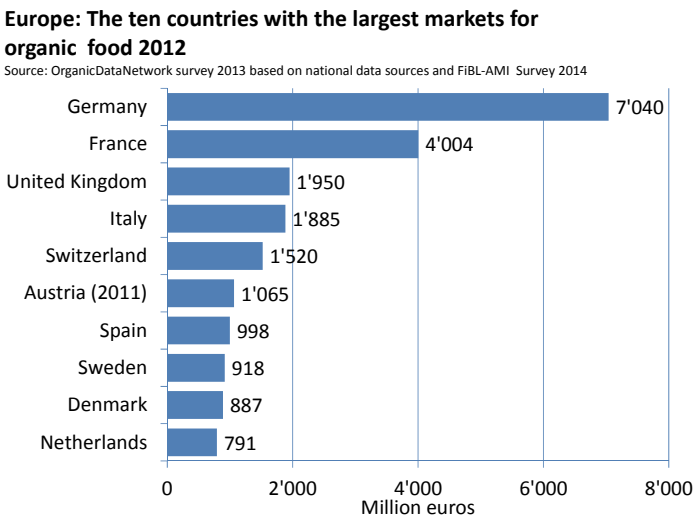


Figure 62: Europe: The ten countries with the largest markets for organic food and beverages 2012 (excluding catering)

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2014
For data sources see annex, page 286

Figure 63: Europe: Distribution of organic food sales 2012

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2006-2014. For data sources see annex, page 286

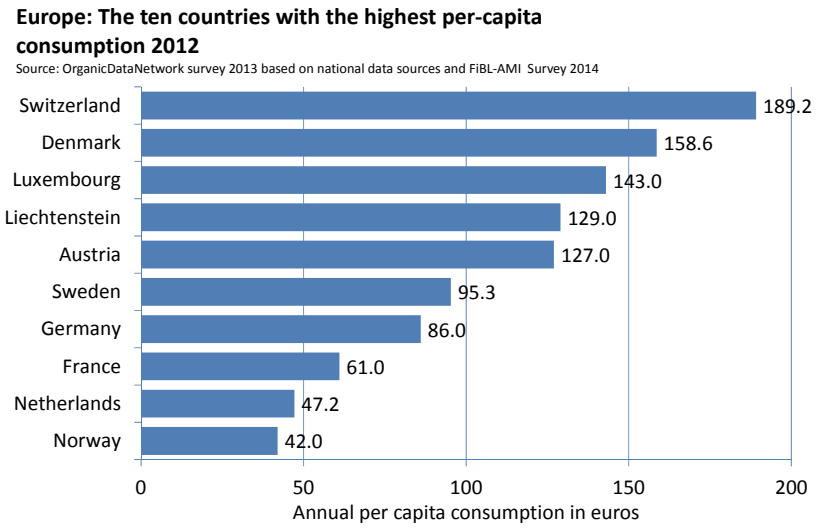


Figure 64: Europe: The ten countries with the highest per-capita consumption 2012 (excluding catering)

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2014. For data sources see annex, page 286

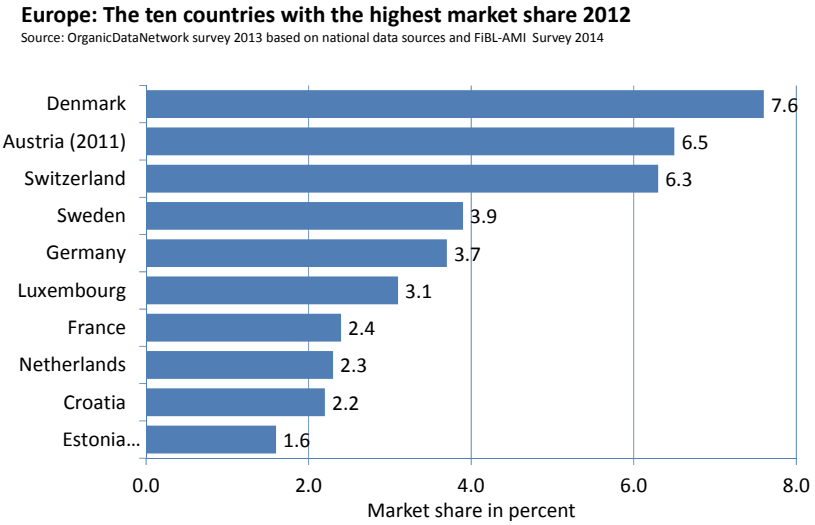


Figure 65: Europe: The ten countries with the highest organic market shares 2012 (excluding catering)

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2014. For data sources see annex, page 286

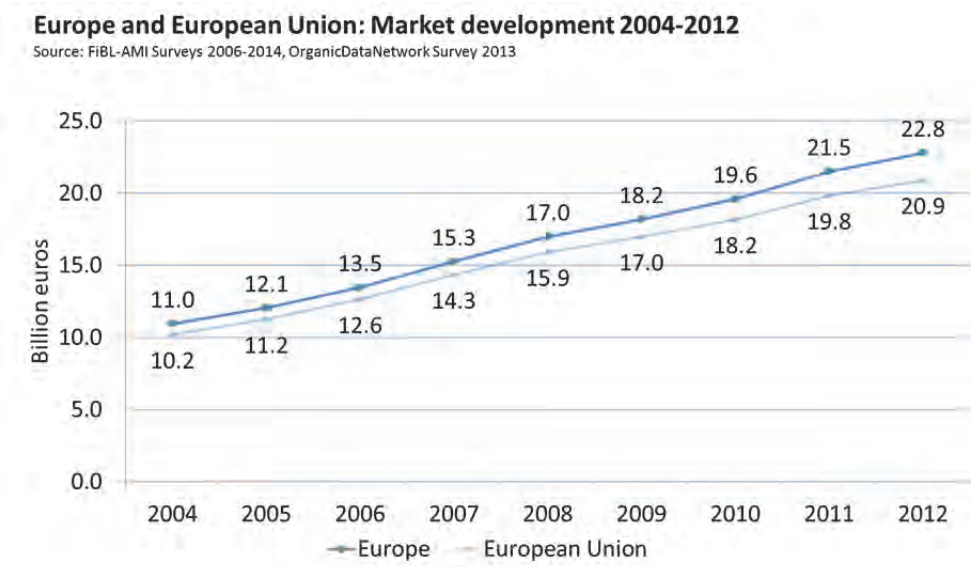


Figure 66: Europe and European Union: Market development 2004-2012

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI surveys 2006-2014. For data sources see annex, page 286.

Figure 67: European Union: Market development in selected countries 2004-2012

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI surveys 2006-2014. For data sources see annex, page 286.

Table: The European market for organic food

Table 51: Europe: The market for organic food 2012

Country	Retail sales [Mio €]	Catering [Mio €]	Retail sales: Change 2011/2012 [%]	€/person	Share of all retail sales [%]
Austria (2011)	1'065	64		127	6.5
Belgium	417		6.5 %	38	1.5
Bosnia and Herzegovina (2010)	1			0	
Bulgaria (2010)	7			1	
Croatia	104		0.7 %	25	2.2
Cyprus (2006)	2			2	
Czech Republic (2011)	66			6	0.7
Denmark	887	109	0.7 %	159	7.6
Estonia (2011)	20			15	1.6
Finland	202		24 %	37	1.6
France	4'004	169	6.6 %	61	2.4
Germany	7'040			86	3.7
Greece (2010)	60			5	0.4
Hungary (2009)	25	0		2	0.3
Ireland (2011)	99			22	0.7
Italy	1'885	290	9.6 %	31	1.5
Latvia (2011)	4			2	0.2
Liechtenstein	5			129	
Lithuania (2011)	6			2	0.2
Luxembourg	75		5-10 %	143	3.1
Montenegro (2010)	0			0	
Netherlands	791	143	14 %	47	2.3
Norway	209	11 (2011)	17%	42	1.2
Poland (2011)	120			3	0.2
Portugal (2011)	21			2	0.2
Romania (2011)	80			4	0.7
Russian Federation	120			1	
Serbia (2010)	40			5	
Slovakia (2010)	4			1	0.2
Slovenia	44	0		22	1.5
Spain	998			21	1.0
Sweden	905		-4 %[1]	95	3.9
Switzerland	1'520		5.3 %	189	6.3
Turkey (2009)	4			0	

[1] The figure on the development of the organic market in Sweden is from Statistics Sweden. According to Ekoweb, the market grew by 3 percent in 2012.

Europe: Market Tables

Country	Retail sales [Mio €]	Catering [Mio €]	Retail sales: Change 2011/2012 [%]	€/person	Share of all retail sales [%]
Ukraine	5			0	
United Kingdom	1'950	20	-1.5 %	32	
Europe	22'795		6 %	35	
European Union	20'893		5.4 %	41	

Source: OrganicDataNetwork survey based on national data sources and FiBL-AMI survey 2014. For details on data sources see annex, page 286

Note on table

- Blank cells: no information available
- Where no published data exists, best estimates from a range of experts have been used, but these were not available for all cases, so sometimes earlier estimates are shown.
- Values published in national currencies were converted to Euros using the 2012 average exchange rates according to the Central European bank. .
- Please note that due to fluctuating exchange rates it is not possible to make a year-to-year comparison for countries that do not have the Euro as their currency.
- For details on data sources please see annex.
- Corrections, revisions and updates should be sent to helga.willer@fibl.org
- Corrections and revisions will be posted at www.organic-world.net

Sources for retail sales value

Austria: Organic Retailers Association; Belgium: Bioforum, VLAM and GfK; Bosnia and Herzegovina: Ecozept; Bulgaria: Bioselena; Croatia: Darko Znaor, private consultant; Cyprus: Ecozept; Czech Republic: UZEI; Denmark: Danish Agriculture & Food Council/Organic Denmark/Statistics Denmark; Estonia: Centre of Ecological Engineering; Finland: Pro Luomo; France: Agence Bio; Germany: AMI; Greece: N. van der Smissen; Hungary: Biokorsar Survey; Ireland: Bord Bia; Italy: AssoBio; Latvia: Ekoconnect; Liechtenstein: KBA; Lithuania: Ekoconnect; Luxembourg: Biogros estimate; IBLA; Montenegro: Ecozept; Netherlands: Bionext, Bio-Monitor; Norway: Norwegian Agricultural Authority SLF; Poland: IFOAM EU estimate; Portugal: Interbio; Romania: BCG-Global Advisors; Russian Federation: Eco-Control; Serbia: Ecozept; Slovakia: Ecozept; Slovenia: ISD; Spain: MAGRAMA; Sweden: SCB; Switzerland: BIO SUISSE; Turkey: MARA; Ukraine: Organic Federation of Ukraine; United Kingdom: Soil Association

OrganicDataNetwork Statement on Data Collection and EU Regulation[1]

In 2013, the OrganicDataNetwork project issued its statement on data collection and made a number of suggestions how data collection could be improved in the context of the European Commission's review of the political and legal framework for organic production.

On March 13, 2013, the first workshop of organic data collectors was held in Newbury (UK), within the framework of the EU Project OrganicDataNetwork.

Based on the results of the workshop, as further discussed with all involved stakeholders on the online project forum, the following statement was issued:

The review of the political and legal framework for organic production, currently implemented by the Commission, is an occasion to improve current practices and methods of organic market data collection. One major obstacle is that data already collected is not used due to lack of harmonisation and methodology. Therefore, the harmonisation of methodology in data collection is of utmost importance – e.g., in order to use the potential of data already collected by authorities.

The OrganicDataNetwork consortium believes that an improvement of current mandatory data provision of the member states, usually based on the data of the control bodies or on administrative data, or data of the statistical offices will contribute to both the inspection system and market transparency.

1. Commission Regulation (EC) No 889/2008 Art.93 (2) on statistical information to be provided by the Member States should be fully implemented in the Member States.
2. Additionally to Commission Regulation (EC) No 889/2008 Art.93 (2), collection of turnover data from processors, wholesalers, retailers, importers and exporters should be made mandatory.
3. To be of any use, Commission Regulation (EC) No 889/2008 Art.93 (2) should more precisely define the statistical data referred to, and should seek harmonisation in the product classification and nomenclature, with specific reference to Eurostat codes. Furthermore, production data on volumes should be collected by product or product group, respectively.
4. To increase its use, data collected by control bodies needs to be coupled with the harmonisation of definitions and concepts used in the inspection system.

Additional improvements in data collection can be achieved by the administrative authorities through:

[1] This statement is the result of a joint work of the consortium of the OrganicDataNetwork project (Data network for better European organic market information, www.organicdatanetwork.net). This project has received funding from the European Union's Seventh Framework Programme for research, technological development and demonstration under grant agreement no 289376. The opinions expressed in this contribution are those of the consortium and do not necessarily represent the views of the European Commission.

- A unique and permanent identifier for each inspected operator (e.g. tax code or any other unique code used at national level) should be established, ensuring the portability of such identifiers when changing control bodies.
- The Commission Regulation (EC) 2286/2003 on the Community Customs Code should be amended by rendering mandatory for import/export operators the C644 code (Certificate of organic inspection) in Box 44 of the Single Administrative Document (SAD) when importing/exporting or re-exporting organic products. In addition, an extra digit should be appended to the TARIC code on relevant organic products, as already experimented by the Italian custom authorities in 2012 for cereals and oilseeds. This will allow the improvement of current foreign trade data collection by differentiating organic and non-organic trade. Amendments to the EC Regulations on the collection of Intra- and Extra-EU trade statistics by Member States will then allow the differentiation of the statistics on trade, which are collected monthly from trade operators.

Finally, the OrganicDataNetwork consortium recommends that improving data collection should be one action point of a new European Organic Action Plan envisaged by the aforementioned review of the political and legal framework for organic production.

More information

Contact: Prof. Dr. Raffaele Zanoli, OrganicDataNetwork project coordinator, www.organicdatanetwork.net

Organic Farming in Croatia

DARKO ZNAOR[1]

The country report on organic farming in Croatia, which is became a member of the Euroepan Union in 2013, is one of the thirty country reports published by the European Union Group of the International Federation of Organic Agriculture Movements (IFOAM EU) in the book "Organic in Europe. Prospects and Developments".[2] The book is available for download at the FiBL web shop (shop.fibl.org).

Highlights for 2013

- Croatia joined the European Union (EU), thus importing and exporting organic produce from and to EU countries has become easier
- A peer-reviewed study on the environmental and economic feasibility of large-scale conversion to organic farming in Croatia was published by the Heinrich Böll Foundation.

History of organic farming

- 1861: Rudolf Steiner, founder of bio-dynamic agriculture born in Croatia
- 1970s: First publications on organic farming by Pavao Krišković
- 1991: Establishment of BIOS, the first organic farming association
- 1996: Book, "Organic Farming – Farming for the Future", published
- 2001: Law on organic farming adopted, followed by first certified production in 2002 and 2003

Key sector

- Association of Croatian Organic Agriculture Producers: www.eko-sever.hr
- Agricultural Advisory Service: www.savjetodavna.hr
- Bioinspekt (certification): www.bioinspekt.com
- Zadruga Agri Biocert (certification): www.agribiocert.hr
- Biotechnicon (certification): www.biotechnicon.hr/certifikacijsko_tijelo.asp

Market

The organic market has been steadily growing over the last couple of years. Processing is still at an early stage of development, but is becoming more popular among organic producers. Most baby food in Croatia is organic, but nearly all is imported.

There is no precise data on the best-selling products, but organic baby food, soya and cereal drinks are in high demand and can be found in nearly all supermarkets.

There is no precise data on market channels, but the great majority of organic food and drinks are sold by general retailers. Two major Croatian traders with shops in the bigger

[1] Dr. Darko Znaor, Independent Consultant, 10000 Zagreb, Croatia

[2] Meredith, Stephen and Helga Willer (Eds.) (2014): Organic in Europe. Prospects and Developments. IFOAM EU Group, Brussels

cities dominate the specialised retail segment. Direct marketing is limited, partly due to complicated administrative procedures and controls. Internet sales are becoming more popular. Fresh fruits and vegetables are also sold at farmers markets.

Data on exports and imports are not publicly available, but some estimates suggest that imported produce makes up approximately 60 % of the value of the organic food and drinks market.

Standards, legislation, organic logo

The Law on Organic Farming Production and Sale of Organic Farming Produce (Official Gazette 139/10) and several by-laws are in place, and they are being implemented and enforced fairly well. Since July 2013, the EU legislation on organic farming and other regulations are applied.

There is a national organic logo in green and white, with the text: Croatian ECO produce.

Policy support

An Action Plan 2011-2016 was adopted in 2011, targeting use of 8 % of the total agricultural area for organic production by 2016. Its implementation is patchy, with no systematic monitoring, public reporting or funding available.

Support under EU rural development programmes: Croatia became a member of the EU on 1 July 2013. Organic farming payments have existed since 2005 and are approximately 30 percent higher than conventional payments. However, organic farmers (like their conventional colleagues) receive these funds with a great delay of up to two years.

Other policy support: Funding by the central and regional governments for certain events, notably agricultural fairs and free extension services as part of the public extension service.

Research & advice

Research on organic farming is marginal and practised only by individuals with a particular interest. Farmers can receive free advisory services and training through the public extension service.

Challenges & outlook

Over the last ten years, the organically farmed area has increased by about 35 percent per year, although in 2012, the organic area shrank by 0.4 percent. This is because a significant number of farms, including some major producers, were no longer granted in-conversion status in 2012. There are significant subsidies for organic production, and effective organic advisory, inspection and certification services. EU membership will offer new funding opportunities and will further ease trade to and from EU countries.

Further information

- Organic Eprints for Croatia: www.orgprints.org/view/projects/Croatia.html
- Ecologica, with information for organic farmers and producers: www.ecologica.hr
- BioBio, a leading specialised retailer: www.biobio.hr
- Garden, the second largest specialised retailer: www.garden.hr/o-gardenu

Ministry of Agriculture, organic farming pages: www.mps.hr/default.aspx?id=6184

Latin America and the Caribbean

Map 5: Organic agricultural land in the countries of Latin America and the Caribbean 2012
Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, governments, and RUTA, the Regional Unit for Technical Assistance for Sustainable Rural Development in Central America. For detailed data sources see annex, page 286

Organic Agriculture in Latin America and the Caribbean

Patricia Flores[1]

Introduction

In the current edition of "The World of Organic Agriculture", we would like to draw your attention to some facts on the regions as the organic sector is embedded in economic policies and dynamics.

Latin America and the Caribbean at a glance

- The region of Latin America and the Caribbean (LAC) is the most urbanized region in the world, with about 80 percent of its population living in cities.
- Latin America and the Caribbean's Gross Domestic Product (GDP) stood at 5.344 trillion US dollars in 2012; with a population of 581.4 million, the per capita Gross National Income came to 8'981 US dollars (World Bank, Data 2012).
- The Amazon sprawls across eight countries, comprises 0.6 billion hectares of dense forest, and is home to one in ten of the known species on earth (WWF, Quick facts of the Amazon biome) as well as plenty of the unknown ones. More than half of the Latin American workers do not have access to a pension through their job.
- Asia is the second largest trading partner of Latin America and the Caribbean's after the United States. As a result of Asia's demand for commodities, trade between Asia and Latin America and the Caribbean grew at over 20 percent per year in the past decade, reaching 442 billion US dollars in 2011 (ADB, 2012).
- Brazil is the world's biggest exporter of coffee, sugar and orange juice (The Economist). Peru is one of the fastest growing economies in the world and has over 30 million inhabitants and a vast surface area of 1.3 million km2. Peru is also home to some 3.5 million alpacas – 80 percent of the world's total.
- Out of nearly 600 million people, 80 million still live in extreme poverty, with half of them in living in Brazil and Mexico.
- Latin America and the Caribbean (LAC) is one of the most unequal regions in the world. All LAC countries were more unequal than the most unequal non-LAC country in the OECD, Turkey.
- Climate change represents a major risk factor that will pull millions of families who have risen out of poverty back down. This has been proven in several countries: particularly in Mexico, Central America, and the Andean Community member States (Climate Change Knowledge Portal, The World Bank Group, 2013).

According to the OECD's Latin American Economic Outlook for 2014, Latin America's economic expansion over the past decade was accompanied by significant progress in poverty reduction. Between 2002 and 2012, the economy of the region grew at an average annual rate of 4.0 percent. This growth was primarily driven by favourable international conditions, which were marked by rapid growth of world trade and increasing commodity prices, and resulted in a positive trade impact in the region.

1 Patricia Flores, IFOAM Representative for Latin American and the Caribbean, Lima, Peru, www.ifoam.org

Currently, the international context is looking less favourable. The low capacity to stimulate internal demand, increasing social demands, and persistent structural limitations are putting the progress that has been made in the fight against poverty and inequality in the region at risk. This scenario shows the urgency of reforms that promote the development of the regional market.

Technological innovation is key for promoting necessary structural change, which underpins diversification, increases productivity, and reduces technology gaps in the region. In Latin America, 57 percent (compared to 17 percent in OECD countries) of exports consist of perishable or logistics-intensive products. The biggest infrastructure gap is in the transport sector, as domestic transport costs per container in some Latin American countries are among the highest in the world. Logistics costs in the region represent 18 to 35 percent of a product's value, compared to around 8 percent in OECD countries. These logistical challenges are reducing the region's competitiveness and threatening the foundations of sustainable economic growth.

Organic agriculture has proven to be an answer to many of the current concerns as it involves diversified production systems, a value chain approach, permanent technology development and innovation, and highly specialized knowledge and skill-based systems. Yet, the organic sector itself is not enough as long as the logistical challenges prevail. Governments have to work further on public policies to multiply the potential of the organic sector. Short organic value chains appear to be a good alternative for local economic development in several Latin American and Caribbean countries.

Important events in 2014: The International Year of Family Farming and the COP 20 in Peru

There are 15 million family farms in Latin America and the Caribbean, managing about 400 million hectares of agricultural land. The International Year of Family Farming (IYFF) 2014 represents a great opportunity for emphasizing the strategic importance of the organic sector in relation to the accomplishment of Millennium Development Goals. Despite many declarations, public strategies and policies continue to fail to internalize the heterogeneity of smallholder agriculture in Latin America and the Caribbean. Progress has been made in reducing food insecurity, undernourishment, and malnutrition, but, at the same time, micronutrient deficiencies remain stubbornly high in the region. Climate change poses two challenges, especially to poor rural households: increased frequency and severity of extreme weather events and long-term shifts in temperature and rainfall. Latin America has already experienced increased variability, frequency, and strength of natural disasters in recent years. There appears to be a positive correlation between natural disasters in LAC and a worsening of welfare indicators.

The United Nations Climate Change conference 2014 (COP 20) is a good opportunity to discuss how weather shocks impact the regional economy and threaten strategies for food security. At this mega event that will take place in December 2014 in Lima, Peru, the International Federation of Organic Agriculture Movements (IFOAM) and its allies will present solutions offered by organic farming in the context of climate change mitigation and adaptation.

Country reports

It has been ten years since Costa Rica attained "third-country" status with the European Union; the first country that was granted this status was Argentina, in 1992. A new scenario, with equivalence agreements among the US, Canada, and EU, is bringing new possibilities for the facilitation of organic product trade in the region. Domestic organic markets are being developed in every country, and the longest-lasting farmers' fairs are being consolidated in many places. Major efforts are being made in giving added value to the products from the region. This is an important approach for the development of organic farming, especially in rural areas where raw materials are produced.

Central America and the Caribbean

Central America is composed of eight countries: Belize, Costa Rica, El Salvador Guatemala, Honduras, Mexico, Nicaragua, and Panama. Dominican Republic, Haiti, Cuba and further countries are part of the Caribbean.

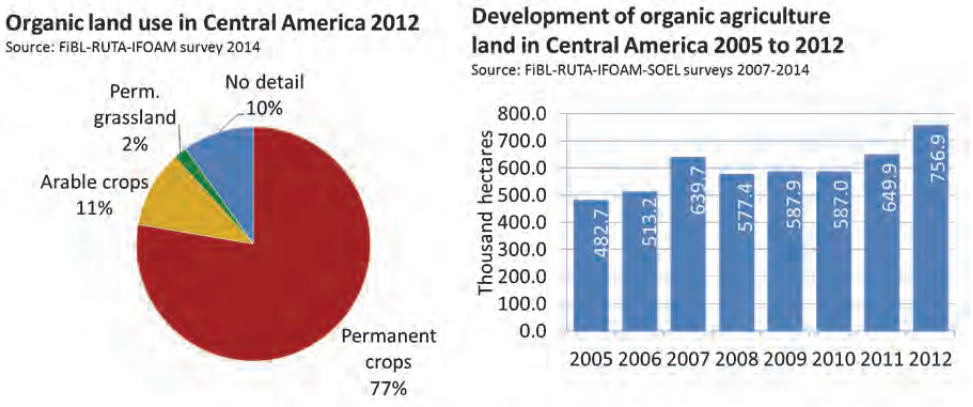


Figure 68: Central America: Organic land use and development of organic agricultural land 2012

Source: FiBL-RUTA-IFOAM survey 2014

› Mexico

In Mexico, almost 500'000 hectares of agricultural land are organic and in transition, managed by almost 170'000 producers (Schwentesius, R. et al., 2013). In 2012, the revenue from organic exports was 500 million US dollars. Almost all producers are smallholders with less than two hectares. The main organic products (by area) are coffee (240'000 hectares), avocados (40'000 hectares), and cocoa (20'000 hectares). Chiapas and Oaxaca are the leading states in organic production, followed by Michoacán and Querétaro y Guerrero; they account for about two-thirds of Mexico's total organic production. Much of the organic production takes place in areas of ecological importance. Cattle farming is in its early stage of development, with Veracruz and Tabasco being the states that mainly produce beef and, to a lesser extent, dairy products. There are also some initiatives with organic sheep and poultry. The "Red Mexicana de Tianguis y Mercados Orgánicos" is a network with an outstanding outreach throughout

Mexico. Since 2003, there has been an increasing number of organic tianguis[1] and markets in several places. Nowadays, there are 16 states with some initiatives of the Red, as it is also known within the organic movement. Markets are built as a joint effort among committed consumers and producers. Some markets are linked to universities, religious groups, and NGOs. Aside from local organic market development, which is a major objective, the Red plays an important role as a key stakeholder for policy development. After many years of intense work in different platforms, public consultations, and advocacy of the Mexican organic movement, the final Organic Agriculture Guidelines were approved on October 29th, 2013. Today, Mexico has a very comprehensive organic regulation framework: the Organic Agriculture Law (2006), the Organic Agriculture Regulation (2010), and the Organic Agriculture Guidelines (2013). All include a national seal for organic products (www.somexpro.org). A strategic activity towards capacity development in the region has to do with leadership in the organic movement. IFOAM, through its Academy Pillar, offers the Organic Leadership Course (OLC) throughout the world. In Latin America, the first course was launched in October 2013 and will end in May 2014. It is a long-distance program with two residential phases in Mexico. The first face-to-face session took place in Capulalpam de Méndez, Oaxaca. The OLC in Mexico has been possible thanks to the support of the agricultural secretary of the State of Oaxaca, Mexico.

Mexico: Development of organic agricultural land 2006 to 2012
Source: Universidad Autónoma Chapingo

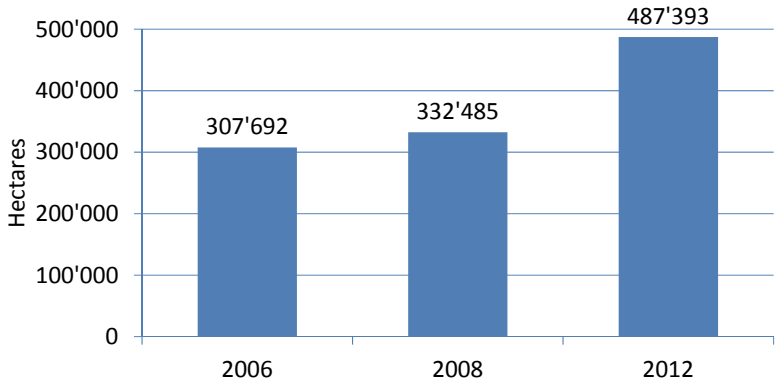


Figure 69: Mexico: Development of organic agricultural land 2006-2012
Source: Universidad Autónoma Chapingo

› Dominican Republic

In February 2013, the Organic Agriculture Department was created to promote organic exports, which were valued at 200 million US dollars in 2012. This office (better known under its Spanish acronym, DAO) is responsible for the evaluation, registration, and control of the activities of organic operators and certification bodies. It is accountable to

[1] Tianguis: term in native Mexican language, meaning markets of peasants and indigenous people. For more information see http://en.wikipedia.org/wiki/Tianguis

the Vice Ministry of Agricultural Extension and Training of the Ministry of Agriculture. The main organic products for export are cacao, coffee, banana, coconut, mango, lemon, avocado, melon, ginger, macadamia, cassava, and vegetables. In 2012, 96'000 metric tons of cacao, 165'000 metric tons of bananas, 4'107 metric tons of coffee, 3'400 metric tons of coconuts, and 3'156 metric tons of mangoes were exported. Approximately 24'000 Dominican farmers are organic, and of these, 49 percent produce organic bananas.

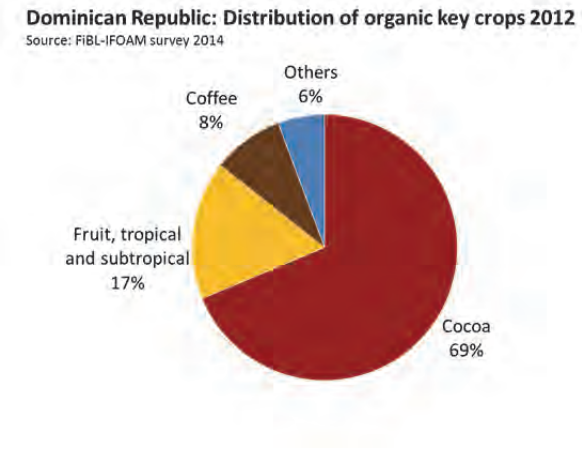


Figure 70: Dominican Republic: Distribution of organic key crops-2012
Source: FiBL-IFOAM survey 2014

› Costa Rica

The competent authority on organic agriculture of Costa Rica: Servicio Fitosanitario del Estado (SFE) of the Ministry of Agriculture and Livestock, is leading a process to obtain recognition for its legislation as equivalent with the National Organic Program (NOP) of the United States. Costa Rica's organic legislation is recognized as similar to that of the European Union and Switzerland. With the European Union, Costa Rica has been included in the Third Country List since 2003. Since 2011, renewal of the status has been automatic. Costa Rica is a leading country in Central America; especially in export markets with value-added products (chocolates, fruit juices, marmalades, etc.). The domestic market is growing, and several farmers' fairs and delivery schemes exist.

South America

South America plays a unique role in the world because of its high biodiversity and enormous capacity for food and non-food agricultural production.

South America : Andean sub-region

The Andean sub-region is composed of four countries: Colombia, Ecuador, Peru, and Bolivia. The Inter-American Institute for Cooperation on Agriculture (IICA), which hosts the secretariat of CIAO (Inter-American Commission for Organic Agriculture), has finalized the process of the regional organic regulation. This was done in collaboration with organic agriculture authorities in the four countries. This process was undertaken

under the umbrella of the Andean Community, a sub-regional integration organization. The process of public consultation has not yet started.

› Peru

The main organic-certified products from Peru are coffee, cacao, bananas, quinoa, and Brazil nuts (Bertholletia excels, wild collection). All 24 departments in Peru have organic production; the total organic area is 305'000 hectares (including wild collection). There are 446 companies consolidating more than 47'000 producers. As in previous years, the departments with the largest organic cultivated area are Junin and Cuzco, with 31'727 hectares and 22'082 hectares, respectively. The department of Madre de Dios is characterized by organic wild collection areas (108'059 hectares). As for the domestic market, the gastronomy movement has contributed to a steady growth of local demand for high quality indigenous food, including organic food. After the approval of Law 29196 on the Promotion of Organic Production in 2012, the Organic Production Regional Committees, which are special, decentralized private and public bodies, were set up in several departments in Peru. So far, about 15 regional committees have been established along with a national committee in December 2013, with representatives from the regions. ANPE Peru, the national grassroots organization of organic producers, is leading several committees. This platform for coordination and policy development will help foster organic production and assist the organic sector, with a special focus on smallholders and domestic markets. In August 2013, the Biodynamic Agriculture Latin American Meeting was held in Lima, Peru, and gathered around 100 representatives from different countries in the region. In September of the same year, SOCLA, the Latin American Society of Agroecology, held its biannual meeting also in Lima, gathering about 500 scientists, researchers, practitioners, and other people from different countries.

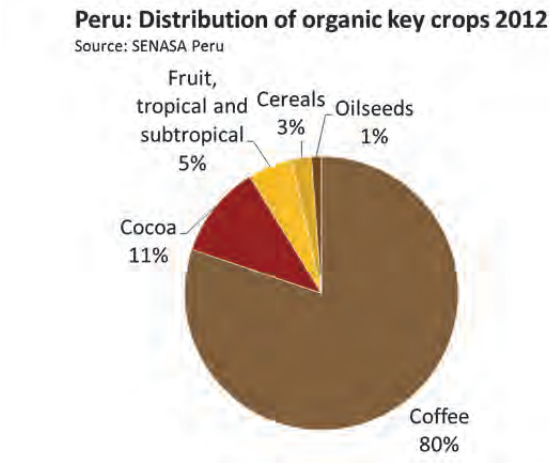


Figure 71: Peru: Distribution of organic key crops-2012
Source: SENASA Peru 2013

› Bolivia

Bolivia is similar to Peru as Brazilian nuts, coffee, and cacao are major organic products of the country. Other important crops in the Bolivian/organic food supply are Andean cereals and grains. In addition, Movimiento de Integracion Gastronomico Boliviano (MIGA), or the Movement for Gastronomic Integration of Bolivia, was founded in 2012. The organization's aim is to enhance and articulate biodiversity, gastronomy, culture, and indigenous food. Inspired by APEGA (Gastronomy Society of Peru), MIGA seeks to add value to Bolivia's regional food patrimony (Patrimonio Alimentario Regional de Bolivia), address the general public, and influence policy making. MIGA gathers 20 allied organizations.

› Ecuador

Mangos are important in Ecuador; they are sold as fresh fruit and as processed products, such as puree, chutney, flakes, and powder. Although coffee is not as important to Ecuador as it is to Peru, Mexico, and the Central American countries, Ecuador also has a tradition as a coffee producing country. In addition to the major products listed above, Ecuador produces a wide variety of organic foods, such as vegetables, grains, cereals, beans, tropical fruits, avocado, and sugarcane. The domestic market has an interesting dynamic with farmers' agro-ecological street fairs in different regions. These fairs are promoted online by the Circuito de Ferias Agroecologicas de Quito (circuitoagroecologico.org), which offers consumers information on producers and products offered. Organic products are guaranteed by participatory guarantee systems (PGS). PROBIO is actively working on strengthening these self-organized initiatives by organic farmers.

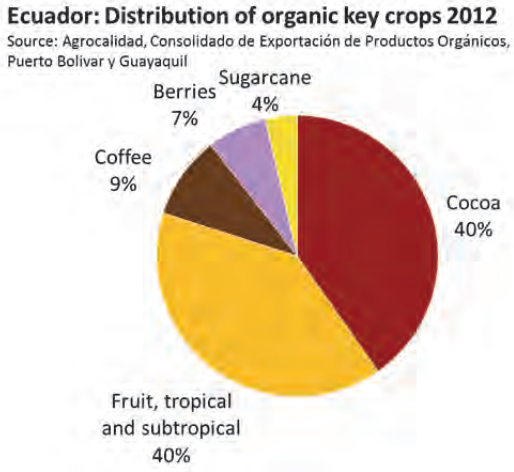


Figure 72: Ecuador: Distribution of organic key crops-2012

Source: Agrocalidad, Consolidado de Exportación de Productos Orgánicos, Puerto Bolivar y Guayaquil

› Colombia

The main organic products are coffee, banana, sugar, fruit pulp, palm oil, and panela, which is unrefined whole cane sugar typical in Central and Latin America. For the domestic market, fresh vegetables and fruits, medicinal plants, panela, and livestock

products are of high importance. In May 2013, Fedeorganicos, together with the Chamber of Commerce, organized a public event focused on organic agriculture. This event, which was accompanied by a fair, was very successful and gathered a diverse group of organic stakeholders from the public and private sector, civil society organizations, and others. The Colombian competency authority has been revising its organic regulation with the aim of speeding up applications for Third Country status with the European Union.

South Cone sub-region

The South Cone sub-region includes Brazil, Argentina, Chile, Paraguay, and Uruguay. This sub-region is characterized by some large organic projects with large pastures for animal grazing. Argentina and Chile have a high number of organic vineyards and wineries. Soybean, sugar, and meat are also notable organic products of this subregion.

› Brazil

Brazil has the largest market in the region. According to the Institute of the Promotion of Development (Instituto de Promoción del Desarrollo, or IPD), the Brazilian organic market was valued at approximately 750 million US dollars in 2012. The sector is developing in a very positive way, and a domestic market value of 1 billion US dollars is expected for 2014. New companies, products, and innovations are emerging, and the market is becoming more diversified. Brazil is a big organic consumer at a global level, and it will become an important strategic trade partner in the coming years. Major supermarket chains offer their own organic and healthy brands, such as Grupo Pão de Açúcar's Taeq, Grupo Carrefour's Viver, and Wal-Mart's Sentir Bem, and an assortment of healthy options, such as Light, Zero, Soya, Integral, and Organic. The BioBrazil organic fair was launched in 2013 in cooperation with BIOFACH America Latina; it attracted 120 participants and more than 30'000 visitors. BioBrazil 2013 revealed that 95 percent of organic food in Brazil is produced by small- and medium-sized farmers and 60 percent of revenue is generated by exports. In Brazil, more than 12'000 production units are certified.

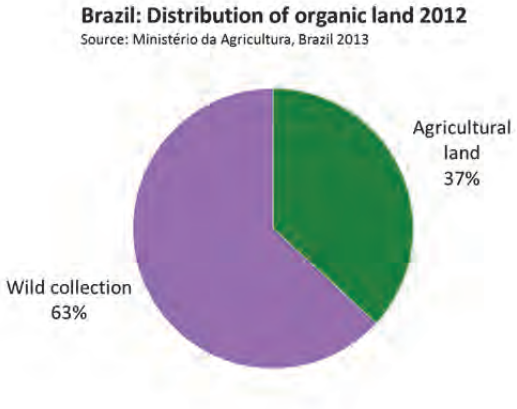


Figure 73: Brazil: Distribution of organic land 2012
Source: Ministério da Agricultura, Brazil 2013

› Argentina

According to the 2012 annual report of official Argentinian authority SENASA, the main export destinations continue to be the United States and the European Union. Exports to the United States increased by 26 percent from the quantity of United States-bound exports in 2011. For the first time, the United States overtook the European Union to become the largest final market . On the other hand, total exports decreased by 10 percent as a result of a decrease in cereals and fruits. The volume of exported animal products decreased by 27 percent. The domestic market is growing and strengthening with new products and commercial presentations. Argentinean consumers are becoming more conscious about the importance of food quality and sustainable food systems. For example, the civil society movement against the installation of Monsanto in the Province of Cordoba is a sign of public awareness regarding food-production methods and issues.

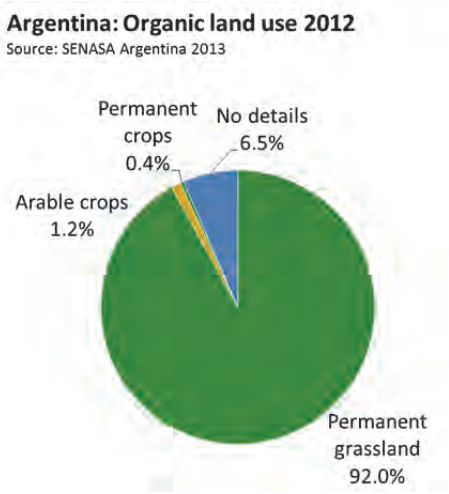


Figure 74: Argentina: Organic land use 2012
Source: SENASA Argentina 2013

References

- Asian Development Bank (ADB), 2012. Shaping the Future of the Asia–Latin America and the Caribbean Relationship.
- Bank of Latin America (CAF). (2013). Latin American economic outlook 2014: Logistics and competitiveness for development. Retrieved from http://www.oecd-ilibrary.org/development/latin-american-economic-outlook-2014_leo-2014-en
- Berdegué, J. A., & Fuentealba, R. (2011). Latin America: The state of smallholders in agriculture. Paper presented at the IFAD Conference on New Directions for Smallholder Agriculture Sources, Lima, Peru Retrieved from http://www.ifad.org/events/agriculture/doc/papers/berdegue.pdf
- Climate Change Knowledge Portal, Th World Bank Group, 2013

- Cord, L. J., Lucchetti, L., & Rodriguez-Castelan, C. (2013). Shifting gears to accelerate shared prosperity in Latin America and Caribbean. Latin America and the Caribbean poverty and labor brief. Retrieved from http://documents.worldbank.org/curated/en/2013/06/17872255/shifting-gears-accelerate-shared-prosperity-latin-america-caribbean
- Food and Agriculture Organization of the United Nations (2013) The state of food insecurity in the world 2013. The multiple dimensions of food security. Retrieved from http://www.fao.org/docrep/018/i3434e/i3434e00.htm.
- OECD/Economic Commission for Latin America and the Caribbean/Development
- OECD, 2014. Latin American Economic Outlook 2014.
- The Economist, 2010. The Global Power of Brazilian Agribusiness. A report from the Economist Intelligence Unit.
- World Bank, 2012. http://data.worldbank.org/region/LAC
- WWF, Quick facts of the Amazone biome. http://wwf.panda.org/what_we_do/where_we_work/amazon/about_the_amazon/

Link

www.agriculturaorganicaamericas.net – Organic farming website of the Inter-American Commission on Organic Agriculture

Latin America and the Caribbean: Current statistics

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

Organic agricultural land

In 2012, 6.83 million hectares were reported as being under organic production, which is 1.1 percent of the total agricultural land in Latin America and the Caribbean. Eighteen percent of the world's organic agricultural land is in Latin America and the Caribbean. Almost 200'000 hectares less area was reported than in the revised figures for 2011. This can be partly attributed to a major decrease, of mainly grassland/grazing areas, in Argentina (almost 160'000 hectares). The organic area has almost double since 2000 (3.9 million hectares. The country with the largest organic agricultural area was Argentina with 3.6 million hectares (Figure 75), and the country with the largest number of producers is Mexico with more than 169'000 (Table 52). The highest proportion of the total agricultural area was reached in the Falkland Islands (36 percent), which is the country with the highest share of organic land worldwide.

Land use

Land use details were available for more than 80 percent of the agricultural land. In 2012, only three percent of all organic farmland was used for arable crops (186'000 hectares), while almost 70 percent was grassland/grazing areas (4.7 million hectares), and 12 percent (820'000 hectares) was used to grow permanent crops (see Figure 78). Argentina (3.3 million hectares), Uruguay (926'000 hectares, data from 2006) and the Falkland Islands/Malvinas (400'000 hectares) had the largest permanent *grassland/grazing areas*.

The key *arable crop* is vegetables with 27 percent of the Latin America and Caribbean organic area given to vegetable production; amounting to more than 50'000 hectares. Most of the vegetables were grown in Mexico (46'000 hectares), Argentina (1'300 hectares), and Peru (1'100). Organic sugarcane was grown on 47'000 hectares in 2012 with the key producing countries being Paraguay (30'000 hectares, data from 2007) and Argentina (8'500 hectares). The main *permanent crops* were coffee (431'000 hectares), cocoa (177'000 hectares), and tropical and subtropical fruits (almost 130'000 hectares).

Wild collection

Wild collection plays an important role in Latin America and the Caribbean, with more than 2 million hectares certified organic. This area is mainly used for the collection of wild nuts (893'000 hectares), wild palmito (66'000 hectares) and wild fruits (6'000 hectares). Information on wild collection is not available for many countries; so it can be assumed that the total wild collection organic area is higher than that presented in this report.

[1] Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl
[2] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[3] Bernhard Schlatter, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

Organic Agriculture in Latin America and Caribbean: Graphs

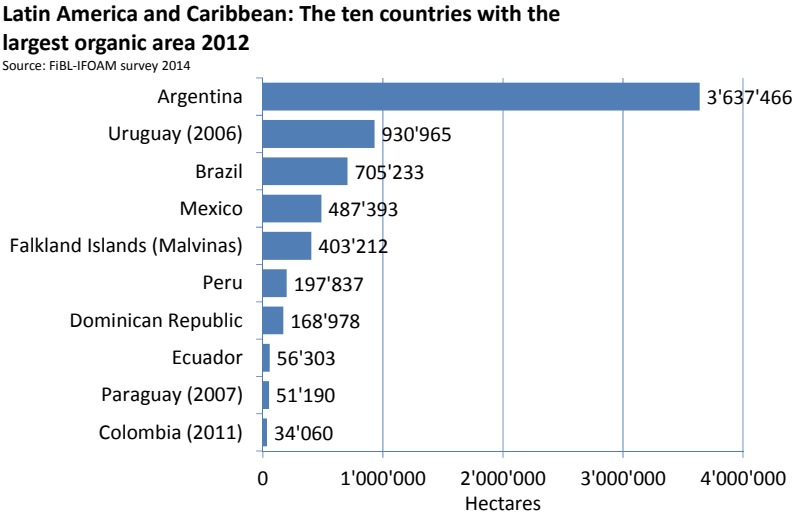


Figure 75: Latin America and Caribbean: The ten countries with the largest areas of organic agricultural land 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

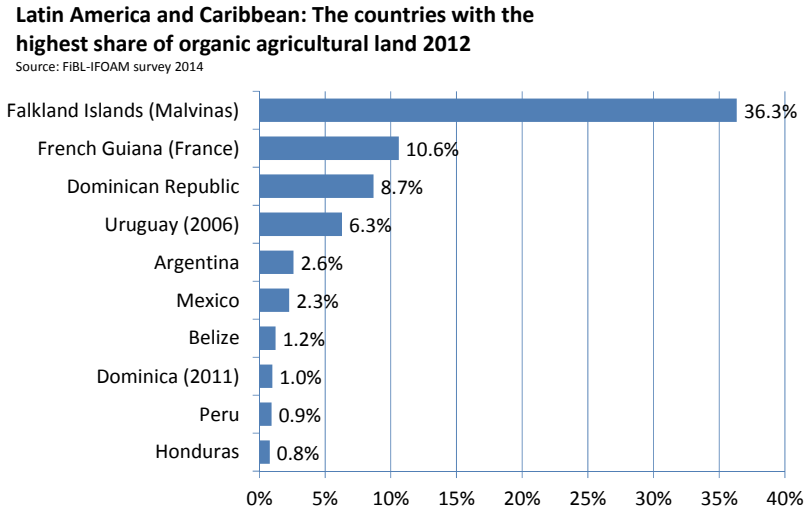


Figure 76: Latin America and Caribbean: The ten countries with the highest shares of organic agricultural land 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

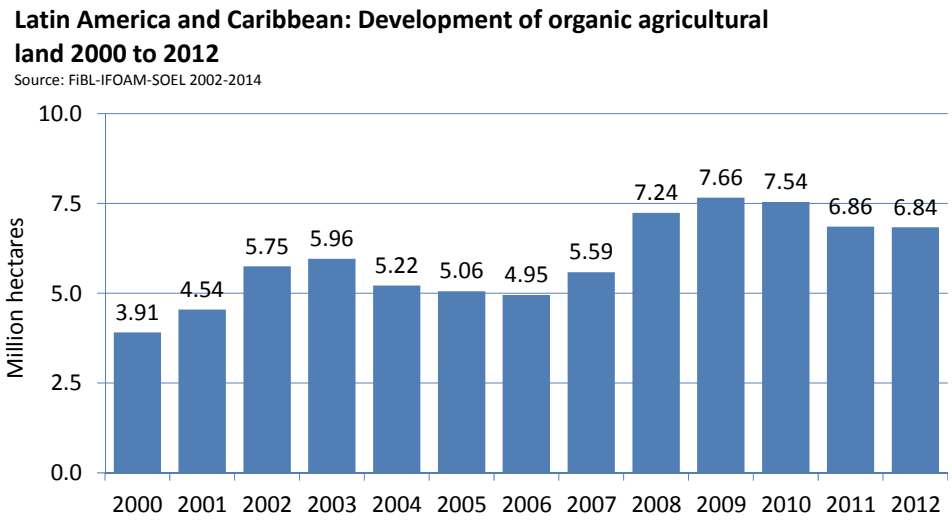


Figure 77: Latin America and Caribbean: Development of organic agricultural land 2000-2012

Source: FiBL-IFOAM-SOEL surveys 2000-2014

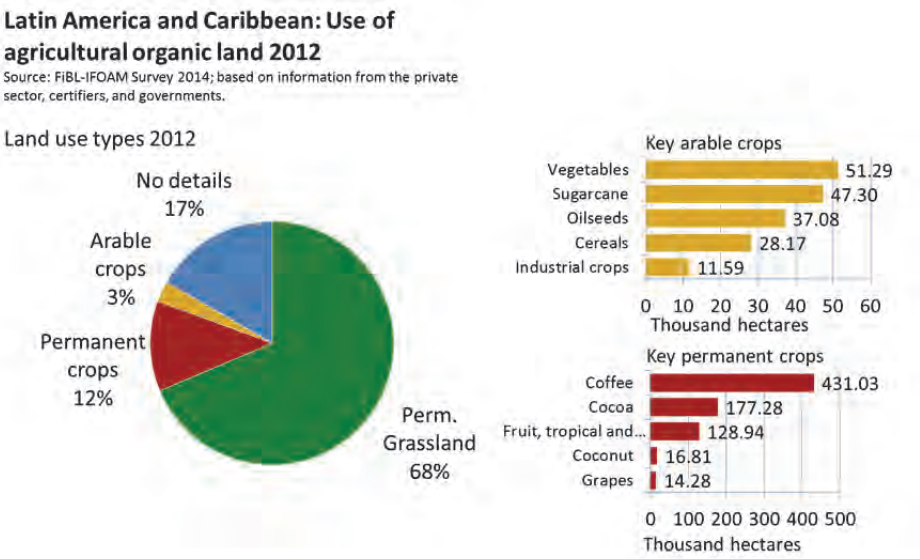


Figure 78: Latin America and Caribbean: Land use in organic agriculture 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

.

Organic Agriculture in Latin America and Caribbean: Tables

Table 52: Latin America: Organic agricultural land, share of total agricultural land and number of producers 2012

Country	Area [ha]	Share of total agr. land	Producers[1]
Argentina	3'637'466	2.59%	1'446
Belize	1'860	1.22%	1'291
Bolivia	32'710	0.09%	9'837
Brazil	705'233	0.27%	12'526
Chile	22'636	0.14%	446
Colombia	34'060	0.08%	4'775
Costa Rica	9'360	0.52%	3'000
Cuba	5'280	0.08%	7
Dominica	240	0.98%	No data
Dominican Republic	168'978	8.68%	24'099
Ecuador	56'303	0.75%	9'485
El Salvador	6'736	0.44%	2'000
Falkland Islands (Malvinas)	403'212	36.34%	8
French Guiana (France)	2'407	10.60%	33
Grenada	85	0.68%	3
Guadeloupe (France)	164	0.39%	33
Guatemala	13'380	0.30%	3'008
Guyana	4'249	0.25%	74
Haiti	806	0.04%	393
Honduras	24'950	0.78%	4'989
Jamaica	542	0.12%	80
Martinique (France)	200	0.71%	30
Mexico	487'393	2.27%	169'707
Nicaragua	33'621	0.65%	10'060
Panama	4'576	0.21%	10
Paraguay	51'190	0.24%	11'401
Peru	197'837	0.92%	47'211
Uruguay	930'965	6.29%	630
Venezuela	59	0.00%	1
Total	**6'836'498**	**1.11%**	**316'583**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

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

Table 53: Latin America: All organic areas 2012

Country	Agri culture [ha]	Aqua culture [ha]	Grazed non agricultural land [ha]	Wild collection [ha]	Total [ha]
Argentina	3'637'466			573'984	4'211'450
Belize	1'860				1'860
Bolivia	32'710			785'453	818'163
Brazil	705'233			1'209'773	1'915'006
Chile	22'636		757	86'466	109'859
Colombia	34'060			6'850	40'910
Costa Rica	9'360				9'360
Cuba	5'280				5'280
Dominica	240				240
Dominican Republic	168'978			260	169'238
Ecuador	56'303	3'127		260	59'690
El Salvador	6'736				6'736
Falkland Islands (Malvinas)	403'212				403'212
French Guiana (France)	2'407				2'407
Grenada	85				85
Guadeloupe (France)	164				164
Guatemala	13'380			5	13'385
Guyana	4'249			59'930	64'179
Haiti	806				806
Honduras	24'950				24'950
Jamaica	542			0	542
Martinique (France)	200				200
Mexico	487'393			30'364	517'757
Nicaragua	33'621			11'463	45'084
Panama	4'576				4'576
Paraguay	51'190				51'190
Peru	197'837	4		108'058	305'900
Uruguay	930'965			2'300	933'265
Venezuela	59				59
Total	**6'836'498**	**3'131**	**757**	**2'875'166**	**9'715'552**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Table 54: Latin America: Land use in organic agriculture 2012

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		1'094'083
Arable crops	Arable crops, other	87
	Cereals	28'168
	Cultivated mushrooms	9
	Flowers and ornamental plants	4
	Green fodder from arable land	295
	Industrial crops	11'586
	Medicinal and aromatic plants	6'775
	Mushrooms and truffles	720
	Oilseeds	37'083
	Protein crops	242
	Root crops	1'180
	Seeds and seedlings	5
	Strawberries	255
	Sugarcane	47'298
	Textile crops	1'766
	Tobacco	35
	Vegetables	51'291
Arable crops total		186'799
Cropland, no details	Cropland, no details	33'472
Other agricultural land	Fallow land, crop rotation	1'979
	Other agricultural land, other	8'315
	Unutilised land	4
Other agricultural land total		10'298
Permanent crops	Berries	5'597
	Citrus fruit	13'497
	Cocoa	177'276
	Coconut	16'809
	Coffee	431'034
	Flowers and ornamental plants, permanent	9
	Fruit, no details	1'179
	Fruit, temperate	6'950
	Fruit, tropical and subtropical	128'936
	Grapes	14'281
	Medicinal and aromatic plants, permanent	2'100
	Nurseries	13
	Nuts	1'003
	Olives	5'213
	Other permanent crops	10'229
	Tea/mate, etc.	6'770
Permanent crops total		820'898
Permanent grassland/grazing areas total		4'690'947
Total		**6'836'498**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Table 55: Latin America: Use of wild collection areas 2012

Use	Area [ha]
Fruit, wild	6'032
Medicinal and aromatic plants, wild	60
Mushrooms, wild	260
Nuts, wild	893'511
Palmito, wild	66'780
Wild collection, no details	1'306'598
Wild collection, other	13'130
Total	**2'286'371**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

North America

Map 6: Organic agricultural land in Canada and the US 2012

Source: Canadian Organic Growers (COG) und United States Department of Agriculture (USDA, data 2011). For detailed data sources see annex, page 286.

Another Milestone Year for the U.S. Organic Industry

BARBARA FITCH HAUMANN[1]

U.S. organic industry once again experienced a major milestone in 2013 with the signing of an organic equivalence arrangement—this time with Japan.

Marking the first U.S. organic arrangement in Asia and first-ever without organic standards exceptions, the arrangement was signed September 26, 2013, in ceremonies at Natural Products Expo East in Baltimore, Maryland. U.S. officials noted the organic equivalence arrangement reopens the important Japanese consumer market for U.S. organic producers of all sizes, and will create jobs and opportunity for the U.S. organic food and farming sector.

Assessments conducted leading up to the signing found organic management, accreditation, certification and enforcement programs are in place in both countries, and conform to each other's respective programs.

As a result, certified organic products as of January 1, 2014, began to move freely between the United States and Japan. Under the agreement, Japan's Ministry of Agriculture, Food and Fisheries (MAFF) recognizes USDA's National Organic Program (NOP) as equivalent to the Japanese Agricultural Standards (JAS) and the MAFF Organic Program. Likewise, the United States allows Japanese products produced and certified under the JAS Organic Program to be marketed as organic in the United States. Both countries require that the accredited certifier be identified on the product label.

Also during 2013, the Organic Trade Association (OTA) launched its Global Organic Trade Guide, the world's first user-friendly website to help U.S. organic producers and handlers export organic products. The site also features an in-depth Market Data section and map tool to communicate global organic trade information in real time.

In other trade issues, U.S. officials at the end of 2013 urged Korean officials to keep their market open to organic products labeled to meet USDA's NOP standard pending the negotiation of an equivalency agreement. Without additional negotiations, Korea's market was scheduled to close for U.S. organic products on Jan. 1, 2014.

Negotiation between the United States and Korea have been ongoing since 2009, when the Korean Ministry of Food, Agriculture, Forestry and Foods promulgated a complex series of regulations governing organic production, labeling, and enforcement in Korea to be implemented on Jan. 1 2010. For the past four years, through concerted efforts by the U.S. government, the U.S. Embassy in Seoul, OTA, the U.S. organic industry, and international trading partners, Korea delayed implementation of the regulation. Thus, U.S. organic products were allowed to be traded freely, without further need for certification.

However, in May 2012, the Korean legislature passed a new Organic Act to go into effect in 2014. Unfortunately, the Act only covered processed products. Thus, beginning January 1, 2013, all fresh/raw organic agricultural products and ingredients were shut

[1] Barbara Fitch Haumann, Organic Trade Association (OTA), 28 Vernon St, Suite 413, Brattleboro VT 05301 United States, www.ota.com

out of Korea unless they were certified to the Korean standard. On January 1, 2014, processed products were to be shut out of Korea unless they are certified to the Korean standard, thus closing the market to all U.S. organic products not certified to the Korean organic standards.

Distinct needs recognized

Meanwhile, another highlight during 2013 was official recognition by the U.S. Secretary of Agriculture Tom Vilsack of the distinct needs of the organic sector.

In a talk in May, Vilsack recognized the unique production system covering U.S. organic agriculture, and announced guidance to remove agency obstacles to its continued growth.

"Organic is not the 'same as.' It is its own separate commodity and needs to be treated as such. I'm committed to that," Secretary Vilsack told OTA Policy Conference attendees.

He also announced plans to increase coverage options for organic producers under federal crop insurance provided through USDA's Risk Management Agency, including removing the five percent organic rate surcharges on all future crop insurance policies beginning in 2014.

Vilsack added that USDA would provide new guidance and direction on organic production to all USDA agencies directing them to recognize the distinct nature of USDA certified organic production and organic goods, and to take into account the documentation and inspection required for organic certification when considering organic operations' eligibility for USDA programs and policies.

Organic production and sales

Through the National Organic Program, USDA has helped farmers and other operations create an industry now encompassing over 17'000 organic businesses in the United States.

Organic production and commerce are bright spots in the American marketplace and contribute to USDA's goals for rural economic development. Organic now ranks fourth in U.S. food and feed crop production at farm-gate values when viewed as a distinct category.

The overall U.S. organic market continued to climb in 2012, reaching 31.5 billion US dollars and experiencing double-digit growth of 10.3 percent, according to *OTA's 2013 Organic Industry Survey*. Of this, organic food sales rose 10.2 percent, to reach 29.023 billion US dollars. This compares to conventional food sales growth of 3.7 percent. Meanwhile, organic non-food sales experienced 11.8 percent growth, to reach 2.455 billion US dollars. Total comparable non-food items grew only 5.5 percent. Organic food's share has grown to 4.3 percent of total food sales, while organic non-food sales account for 0.6 percent of total comparable non-food sales.

Production data collection still lags for U.S. organic agriculture, although USDA's Economic Research Service now provides updated figures online through 2011. These show there were 2'298'130 acres (approx. 0.9 million hectares) of certified organic pasture/rangeland and 3'084'989 acres (approx. 1.25 million hectares) of certified

organic cropland in 2011, for a total of 5'383'119 acres (approx. 2.12 million hectares). Tables show the change in U.S. organic acreage and livestock numbers from 1992 to 2011. Data for 1997 and 2000-2011 are presented by State and commodity on the Economic Research Service site.

During Fiscal Year 2012, almost 9'600 certified organic farms and businesses participated in the Organic Certification Cost Share Programs. These programs reimbursed farmers and businesses over 6.6 million US dollars for organic certification expenses, at an average of 688 US dollars per operation. In Fiscal Year 2013, this program was available to farmers in 16 States.

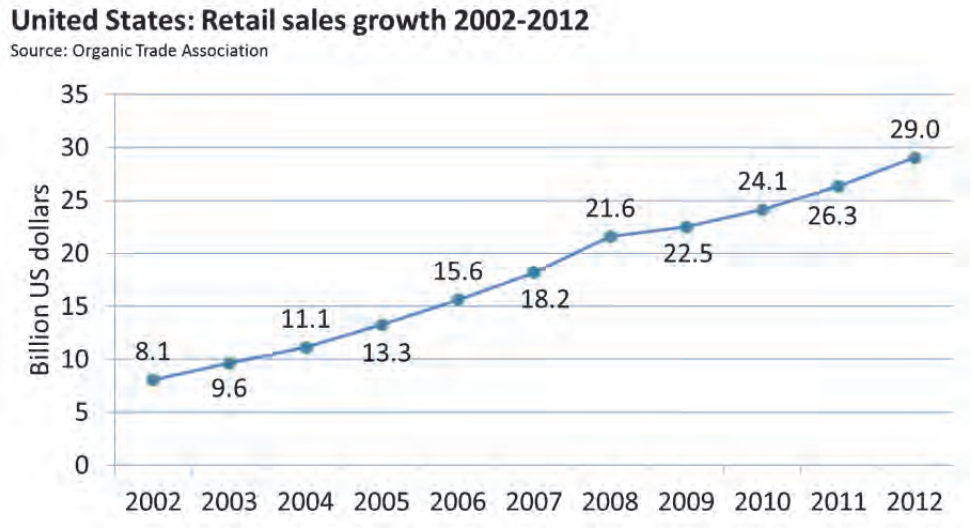


Figure 79: United States: Retail sales growth 2002-2012
Source: Organic Trade Association

Consumer update

The U.S. Families' Attitudes& Beliefs 2013 Tracking Study, for which OTA partners with *KIWI Magazine*, once again revealed that parents' top reasons for purchasing organic foods are related to their and their families' health. Nearly half (48 percent) of those who purchase organic foods said they do so because they are "healthier for me and my children." Additionally, parents' desire to avoid toxic and persistent pesticides and fertilizers, antibiotics and growth hormones, and genetically modified organisms ranked high among the reasons cited.

U.S. families are increasingly embracing organic options. In 2013, eight in ten (81 percent) parents reported they buy organic products, up significantly from 73 percent recorded in the 2009 benchmark study. The proportion of "Newly Organic" parents—relatively new entrants to the organic market—has increased to 4 in 10 (41 percent) families, while Non-Buyers continue to decline, representing only 19 percent of U.S. families.

Organic buyers say they spend more per shopping trip and shopping more frequently than those who never purchase organic food. Produce continues to be the leading category, followed by breads and grains, dairy and packaged foods. Awareness of the USDA Organic seal has also grown. Moreover, 42 percent of parents say their trust in organic products has increased, versus 32 percent who indicated this point of view a year ago.

Farm Bill advocacy

Seeking congressional support for a new five-year farm bill with provisions included for organic agriculture similar to those in the expired 2008 Farm Bill was a priority for the organic sector during 2013. Although Congress did not reach agreement on a new farm bill before the end-of-year holiday break, congressional agriculture leaders leading the negotiations said that enough progress had been achieved to expect a farm bill deal could be reached in Conference possibly in January.

During a year busy with advocacy actions, OTA and its members visited congressional offices during its May Policy Conference to advocate for organic agriculture in a new farm bill, among other topics. OTA later lobbied all members of the Conference Committee to support organic priorities in a final bill, and nearly 1'000 organic operations sent approximately 3'000 letters of support for organic priorities to their Senators and Representatives during the Conference Report talks.

Secretary Vilsack on November 21 released a White House report on USDA programs calling for quick passage of a new farm bill. Highlighting OTA data, the report declared that a comprehensive farm bill would continue to support the growth of global organic market opportunities and expansion of domestic organic production options.

Food safety proposals

Meanwhile, U.S. Food and Drug Administration's (FDA's) proposed rules offered under the Food Safety Modernization Act (FSMA) have generated much discussion and concern over how they will affect the organic sector. Proposals have included a Produce Safety Rule and a Preventive Controls for Human Food Rule. As part of the process, OTA convened a Food Safety Task Force to analyze the proposed rules, and collected and submitted comments.

In mid-November, OTA met with officials in Washington in critical meetings to educate federal officials on the regulatory conflict between FDA's proposed produce safety rule and USDA's NOP Regulations. These meetings provided a rare opportunity to make closing arguments directly to FDA just hours before the originally scheduled closing of the comment period. OTA concurrently met with key officials at USDA's Agricultural Marketing Service to ensure they were fully informed in preparation for inter-agency discussions that would take place once the comment period closed.

Research efforts

In 2012, The Organic Center (The Center) relocated its headquarters from Boulder, CO, to Washington, D.C. Revitalizing its work during 2013, the independent non-profit 501(c) (3) science center now operates under the administrative auspices of OTA.

In February, The Center named Jessica Shade, Ph.D., to serve in its newly created position of Director of Science Programs. In this position, Dr. Shade manages ongoing science programs and related communicated activities for The Center. Since then, The Center has stepped up its research focus, collaborating on such research issues as fire blight in apple and pear orchards, decreasing arsenic uptake in organic rice systems, the effects of organic farming practices on nitrogen pollution, and soil health on organic farms.

The Organic Center also unveiled a newly re-designed website highlighting the science behind organic for consumers, policymakers, the media and others. The website reflects the results of The Center's evolving work, and is updated with the most current research in the organic sector.

In late October, The Center announced the names of 24 scientists now serving on its newly formed Science Advisory Board. All are distinguished scientists recognized for excellence in the field of organic research.

Other opportunities and challenges

Meanwhile, the U.S. organic industry continues its conversation to determine if there is a fair and equitable way to pool funds for organic research and promotion. Based on input collected from across the country during 2011 and 2012, OTA's Organic Research and Promotion Program Steering Committee drew up options for a framework outlining how a program could be structured.

During 2013, OTA actively reached out to the more than 17'750 certified organic operations across the supply chain to encourage everyone to weigh in and help shape the outcome of this potential game-changing initiative. As part of the effort, it established a United for More Organic website, and encouraged those in the organic sector to sign up for a newsletter to learn more about the initiative, and provide feedback via a survey.

Moreover, two legislative "technical fixes" needed to remove obstacles to establishing an organic research and promotion program have received support in Congress. One fix would adjust the narrow exemption for certified organic producers and handlers from conventional check-off programs. Although an organic exemption is already in the law, it is written in such a way that makes it difficult to exercise for many, and is inconsistent with NOP regulations. The second would amend the Generic Research and Promotion Act to allow a multi-commodity sector like certified organic to participate if it chooses to.

If enacted into law, the amendments would not establish an organic check-off—they merely allow the organic sector the same choice that other sectors of agriculture already have to petition USDA. Both were included in both the Senate and House Farm Bills as Congress went to conference. Thus, prospects for removing these barriers look favorable provided Congress finalizes a new Farm Bill, which is then signed into law by the President.

On another front, organizations continue to wage campaigns for labeling foods containing genetically modified organisms (GMOs) in the United States. On the national front, many organizations partner in the Just Label It campaign seeking national mandatory labeling on products produced using GMOs.

In April 2013, the Genetically Engineered Food Right-to-Know Act was introduced in the U.S. Senate and the House of Representatives. The bill was sponsored by Senator Barbara Boxer (Democrat-California) and Representative Peter DeFazio (Democrat-Oregon) with co-sponsors in the Senate and in the House. This bill would require food manufacturers to label any product that has been genetically engineered or contains genetically engineered ingredients.

Meanwhile, in messages to the public, OTA consistently points out that organic is the gold standard for consumers seeking to purchase products that have been produced without the use of genetic engineering.

Resources

- The Organic Trade Association (OTA)'s Global Organic Trade Guide, online at http://www.globalorganictrade.com/.
- The Organic Trade Association's 2013 Organic Industry Survey, Organic Trade Association, 2013.
- U.S. Department of Agriculture's Economic Research Service, Organic Production data through 2011, posted online at http://www.ers.usda.gov/data-products/organic-production.aspx#25762.
- Organic Certification Cost Share Program, National Organic Program, posted online at http://www.ams.usda.gov/NOPCostSharing.
- The U.S. Families' Attitudes& Beliefs 2013 Tracking Study, Organic Trade Association, 2013.
- The Organic Center, found online at www.organic-center.org.
- United For More Organic, found at http://www.unitedformoreorganic.com

Organic Agriculture in Canada

MATTHEW HOLMES[1] AND ANNE MACEY[2]

New data confirms that Canada's organic market continues to be a world leader, with robust growth and great potential for future growth. However, high conventional commodity prices and other factors have continued to weigh on producer numbers, which have continued their recent decline. This appears to have stabilized in 2012, as only the Prairie region continued its decline while other regions maintained or increased their producer numbers.

Organic production

Data collection system

Canada's organic sector continues to rely on voluntary disclosure of data by certifiers, provincial organizations and some governments to get a statistical portrait of the sector in the country. This year, voluntary participation was significant, making 2012 the year with the most comprehensive data since 2005. However, until there is a mandatory, coordinated national data collection system, this method will remain open to inconsistencies and year-over-year change.

Producers

The numbers of primary producers has declined slightly (2.8 percent) over the past year. This is primarily due to a continuing trend observed for the past three years caused by the decline of producers in Saskatchewan and Manitoba. Since 2011, Saskatchewan has seen its number of producers drop by 18 percent, and Manitoba by 22 percent. The number of producers in Quebec (1'039 producers) now surpasses the number in Saskatchewan; it increased by 3.6 percent compared to 2011. British Columbia's organic sector is steadily growing; 2012 was not an exception, with a 7.3 percent increase. The number of producers remained stable in the Atlantic Provinces and Ontario. Primary producers include those with the following types of enterprises: crops of all kinds including mushrooms, livestock operations, bees and wild harvests.

Organic agricultural land

Total acreage in certified production, including both annual and perennial crops, forages and pasture, is estimated at 825'079 hectares; transitional acreage in Canada is estimated at 8'804 hectares. This is approximately 10'000 hectares lower than reported in 2011, but with insufficient data in 2011, it is impossible to attribute the loss to any particular type of production. Acreage increased in British Columbia (20.9 percent), Alberta (13.6 percent), Ontario (13.1 percent) & Quebec (16.8 percent), but declined in Manitoba (-14.1 percent) and Saskatchewan (-12.3 percent). In addition, there is considerable acreage of maple forest in Quebec, Ontario and New Brunswick (49'871 hectares) as well as areas used for the collection of wild blueberries.

[1] Matthew Holmes, Executive director, Canada Organic Trade Association (COTA), PO Box 6364, Sackville, NB E4L 1G6, Canada, www.otacanada.ca
[2] Anne Macey, Canadian Organic Growers (COG), www.cog.ca

Livestock production

- Livestock data for 2012 was inconsistent and did not provide adequate information to compare to previous years; some data provided included all age classes, other data included breeding animals only.
- The 2011/12 dairy year saw 218 farms produce 937'137 hectolitres of organic milk, which represents 1.19 percent of total Canadian dairy production

Processors and handlers

A total of 1'237 operators are manufacturing, handling or distributing organic products in the country. This is 24 percent higher than reported in 2011; some of this dramatic increase may be attributed to partial data reported in 2011. Quebec counts for 48 percent of all the processors and handlers in the country (578), followed by Ontario (282) and British Columbia (213).

New insights from the 2011 Census of Agriculture

The 2011 census of Agriculture classified farms by eleven production groups. The largest organic farm groups are concentrated in two categories, with 31 percent of organic farms in oilseed and grain farming, and 26 percent in general crop farming, which includes mixed production and specialty crops. Dairy production, beef cattle, fruit and nut production and vegetable production account for 7-8 percent each, with greenhouse and non- traditional livestock production (such as bison) both at 5 percent. Hog, poultry and egg production round out the total.

The Census research has also offered new insights into organic farmers in Canada, particularly along labour and demographic lines: For example, thirty percent of organic farm operators are women, a proportion slightly higher than in conventional farming (27 percent). Organic farmers also tend to be younger: the percentage of farm operators over 55 years old is lower in the organic sector (41 percent) compared with conventional farmers (48 percent). Although organic farms represent 1.8 percent of total farms in Canada, the organic sector employs 3.75 percent of the total farm workforce. Organic greenhouse establishments employ one fifth of this total, followed by fruit & tree nut and horticultural farms.

The Census also suggests that organic farming is able to support farming families, who are able to earn more than their non-organic neighbours. The concentration of Canada's organic farms are found in the middle and higher gross farm receipt categories, whereas most conventional farms are in the lowest category, or operate as large-scale operations.

A new seed initiative

The Canadian food system relies on a handful of varieties of a few major crops. The seeds that produce these crops are largely bred for uniformity and performance under controlled conditions. Canadian farmers who want to grow biodiverse vegetables and grains must often purchase seeds from the US, Europe, or further afield. In an age of ever-changing growing conditions, food security requires locally grown seeds with the genetic diversity needed to adapt to tomorrow's climates.

The Bauta Family Initiative on Canadian Seed Security was launched in 2013 thanks to a grant from The W. Garfield Weston Foundation. The program, administered by USC

Canada, focuses on organic and ecological seed. It will feature training, applied research, market development, and support for expanded production and improved public access to seed over a four-year period. USC Canada, with its regional partners, will work with seed producers, farmers, farmer organizations, seed banks, organic industry partners, researchers in plant genetics and climate, governments, and food organizations to at least double the production and spread of biodiverse, locally-adapted seed.

Major market and consumer research

In 2013, the Canada Organic Trade Association released the first comprehensive study of the Canadian organic market and consumer, based on 2012 data. Two previous studies were conducted before the introduction of Canada's Organic Products Regulations in 2009 and were based primarily on mainstream grocery sales tracked and aggregated by the Nielsen Company. They described an expanding organic marketplace—but one that existed before the global recession, and before the introduction of strict national standards, import restrictions and mandatory regulatory requirements on organic claims that tightened what made it to market.

COTA's new study has found that the value of the Canadian organic food market, at 3 billion Canadian dollars per year, has tripled since 2006, far outpacing the growth rate of other agri-food sectors. Food and beverages (including alcohol) account for about 96 percent of the domestic market, with the remainder in smaller, high- growth categories such as fibre and textiles, personal care, supplements, pet foods, and other products. Canada is also a major source of organic products to the world: with exports worth approximately 458 million Canadian dollars per year. The total Canadian organic market is now valued at over 3.5 billion Canadian dollars per year in sales.

In mainstream retail, organic whole foods tend to outperform packaged, prepared and snack food categories. Fruit and vegetables are the clear leaders in organic sales, capturing over 40 percent of total sales. The beverage category narrowly beats out dairy and eggs in terms of sales due to strong sales of organic coffee. Bread and ready-to-eat cereals lead sales in the bread and grains category.

The Canada Organic Regime, launched in 2009, is playing a large role in boosting consumer confidence and interest in organic products. The new "Canada Organic" logo and claim is among the top-four most influential claims that increase consumers' likelihood to purchase a food product. Canadian consumers show a strong bias toward the new Canada Organic logo (compared to "USDA Organic" or the EU 'leaf' seal) and consistently seek out local or made-in-Canada options.

A majority of Canadians, at 58 percent, report the purchase of some organic products every week. And that rate is even higher among ethnic Canadians, people living in Canada's largest cities, households with young families and consumers with university educations.

Over half of Canadians feel that organic farming is better for a healthy environment, and nearly half of Canadians consider organic foods a healthier, more nutritious choice; believe ecological sustainability is an important consideration when choosing food products and want to choose products that are not genetically engineered (GMO).

Further, 98 percent of organic shoppers expect to increase or maintain their spending on organic fruit and vegetables over the next year. Spending increases are most frequently expected in the organic fruit and vegetable, meat and poultry, dairy and bread and grains categories.

The report concludes by identifying a number of opportunities and next steps, including

- the need to broaden and deepen the consumer market;
- strengthening local, organic options through direct marketing, and through meeting the demand for "Made in Canada" organics;
- building a viable organic meat and poultry sector;
- supporting the national regulations at the provincial level through regulation.

Responding to recommendations in the national market and consumer study, Canada's Organic Value Chain Roundtable prioritized the launch of a new consumer-oriented generic brand marketing campaign to promote organic directly to the consumer. With the tagline "Think before you eat: think Canada Organic", the campaign is aimed at encouraging the purchase of domestic organic products. The campaign can be recognized by its signature octagonal green plate—a "go sign", rather than a red stop sign—which symbolically encourages eaters to cut through the 'noise' and ask questions about the food they are consuming. It was launched during Organic Week in September and will become a major public campaign at farmers markets, retail, and social media. COTA and COG have been tasked with administering and managing the brand concept on behalf of the Canadian sector.

Major standards revisions underway

Following years of intense lobbying by the Canadian sector, and months of delays, it has now been confirmed that the Canadian Organic Standards will be reviewed and amended over the next two years with 297'000 Canadian dollars in funding from Agriculture and Agri-Food Canada, along with 600'000 Canadian dollars from the Canadian General Standards Board (CGSB) for supervision. This process is a necessary part of standards maintenance to clarify vague sections, bring the standards in line with the sector's development, as well as improve alignment with the standards of our trading partners.

Since the organic standard was first published in 2009, the Standards Interpretation Committee has reviewed and responded to more than 160 questions from the organic sector. Many questions have been flagged as requiring the attention of the Technical Committee, including contradictions, inconsistencies or unclear wording within the standard and the Permitted Substances List and its annotations.

The Technical Committee held its first three-day meeting in December 2013. The project, coordinated by the Organic Federation of Canada, expects to publish a newly revised Canadian Organic Standard in August 2015.

North America: Current statistics

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

Organic agricultural land and producers

North America's organic agricultural land reached 3 million hectares in 2012, which is 0.7 percent of the total agricultural area. Eight percent of the global organic agricultural land is North America. The area under organic cultivation has almost trebled from the million hectares in 2000. Between 2011 and 2012, the area dropped by 7'000 hectares or 0.2 percent, due to a decrease in organic land in Canada. Data for the United States have been recently updated for 2010 and 2011, and they show a significant increase since 2008. More than 1.2 percent of the farmland in Canada is organic, and the proportion in the United States is 0.6 percent. There are a total of 16'500 producers in North America: most of them in the United States (almost 80 percent).

Land use

Detailed land use information was available for both countries. The organic agricultural area was mainly used for arable crops and permanent grassland/grazing areas, which constituted almost 80 percent of the organic agricultural land, while four percent (120'000 hectares) were used to grow permanent crops.

The key *arable crop* group is cereals, which represent almost 20 percent of the organic area and are grown on 530'000 hectares. Wheat was the main cereal grown, with almost half of the total cereal area at more than 220'000 hectares, followed by maize and oats. The key *permanent crops* were temperate fruits (31'000 hectares), followed by nuts (9'500 hectares) and grapes (almost 16'000 hectares).

Market

In 2012, the organic market continued to grow in North America, reaching almost 25 billion euros. In the United States, the market grew by more than 10 percent in 2012, and the Canadian organic market grew by five percent. The United States is the largest single organic market in the world, and North America continues to be the continent with the largest organic market.

For more information about the Northern American figures, see data tables, page 254.

[1] Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[2] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[3] Bernhard Schlatter, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

Organic Agriculture in North America: Graphs

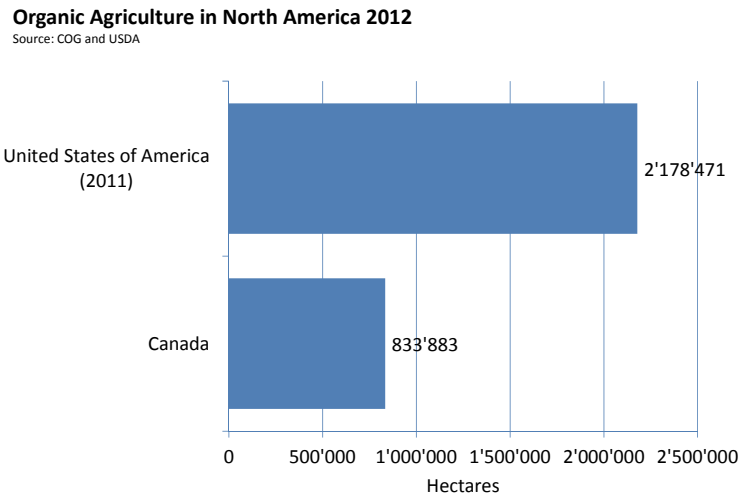


Figure 80: North America: Organic agricultural land in Canada and the United States 2012

Source: Canadian Organic Growers and United States Department of Agriculture. US data from 2011.

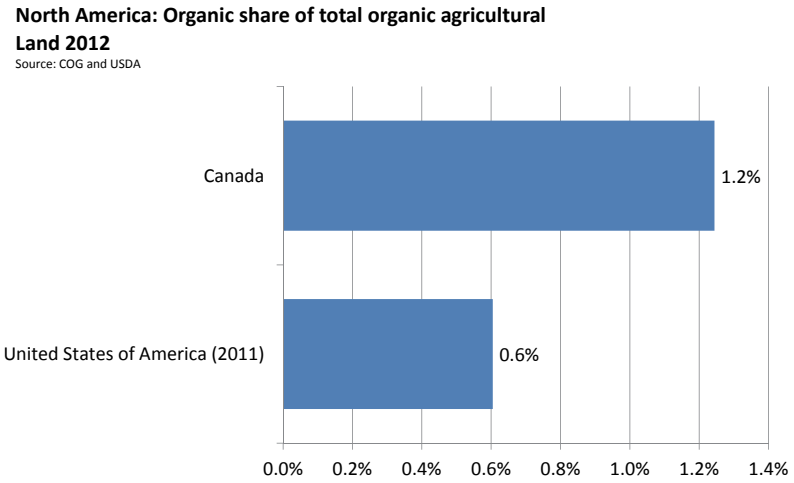


Figure 81: North America: Organic share of total organic agricultural land in Canada and the United States 2012

Source: Canadian Organic Growers and United States Department of Agriculture. US data from 2011

North America: Development of organic agricultural land 2000-2012
Source: COG and USDA

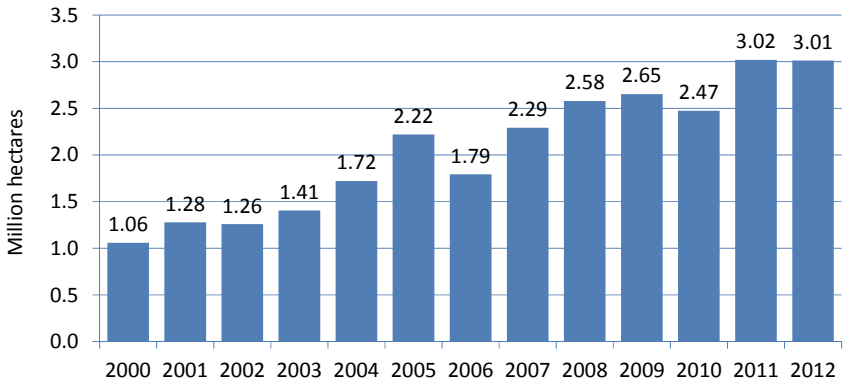


Figure 82: North America: Development of organic agricultural land 2000-2012 (for the US the latest available data are from 2011)

Source: Canadian Organic Growers and United States Department of Agriculture

North America: Land use in organic agriculture 2012
Source: COG and USDA

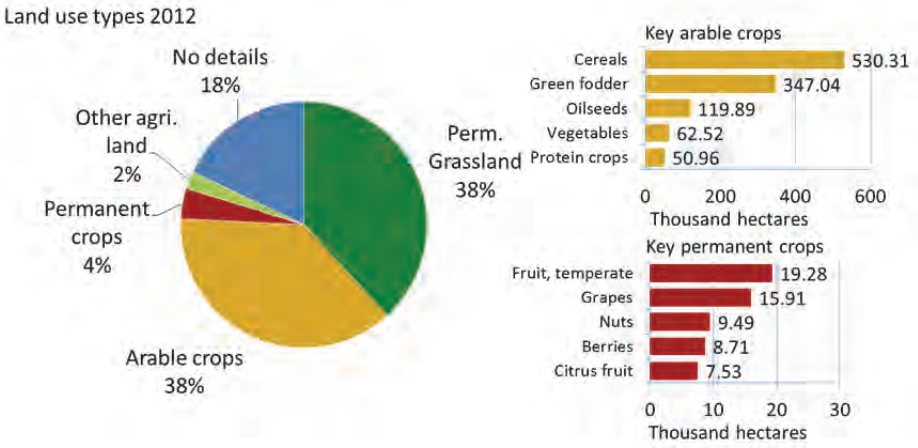


Figure 83: North America: Land use in organic agriculture 2012 (for the US the latest available data are from 2011)

Source: Canadian Organic Growers and United States Department of Agriculture

Organic Agriculture in North America: Tables

Table 56: North America: Organic agricultural land, share of total agricultural land and number of producers 2012

Country	Agr. land [ha]	Share of agr. land	Producers
Bermudas		Processing, only	
Canada	833'883	1.23%	3'590
United States of America (2011)	2'178'471	0.64%	12'880
Total	3'012'354	0.74%	16'470

Source: Canadian Organic Growers (2012) and United States Department of Agriculture (2011); FiBL-IFOAM survey 2014

Table 57: North America: All organic areas 2012

Country	Agricultural land [ha]	Grazed non agr. land [ha]	Wild collection [ha]	Total [ha]
Canada	833'883	180'085	49'871	1'063'839
United States of America (2011)	2'178'471			2'178'471
Total	3'012'354	180'085	49'871	3'242'310

Source: Canadian Organic Growers (2012) and United States Department of Agriculture (2011)

Table 58: North America: Land use in organic agriculture 2012

Land use	Crop group	Area [ha]
Agricultural land and crops, no details	Agricultural land and crops, no details	161'498
Arable crops	Arable crops, other	3
	Cereals	530'305
	Green fodder from arable land	347'035
	Hops	6
	Mixed cereal grains	6'276
	Oilseeds	119'890
	Protein crops	50'964
	Root crops	5'979
	Strawberries	33
	Textile crops	8'686
	Vegetables	62'523
Arable crops total		1'131'700
Cropland, no details	Cropland, no details	378'920
Other agricultural land	Fallow land, crop rotation	22'459
	Other agricultural land, other	21'822
	Unutilised land	25'027
Other agricultural land total		69'308
Permanent crops	Berries	8'707
	Citrus fruit	7'528
	Flowers and ornamental plants, permanent	3
	Fruit, temperate	19'277
	Fruit, tropical and subtropical	6'717
	Grapes	15'908
	Nuts	9'490
	Other permanent crops	52'589
Permanent crops total		120'219
Permanent grassland/grazing areas *total*		1'150'709
Total		3'012'354

Source: Canadian Organic Growers and United States Department of Agriculture. For the US the latest available data are from 2011.

Oceania

Map 7: Organic agricultural land in the countries of Oceania 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. Data for Australia from 2009. For detailed data sources see annex, page 286

Organic Farming in Australia

ALEXANDRA MITCHELL[1] AND PAUL KRISTIANSEN[1]

Size of the industry

Statistical information for the Australian industry continues to be a mix of information derived from data supplied by the certifiers to the Australian Quarantine and Inspection Service (AQIS), and in 2010-11 the data was provided by the Australian Bureau of Statistics (ABS). There have been no new surveys undertaken by ABS in the last 12 months, and the figures for 2011-12 are estimates based upon corrections of numbers provided by certification agencies (Table 59).

Table 59: Australia: Area of organic holdings and number of organic producers in Australia (1990-2012)

Year	Hectares	% of total hectares	Number of producers
1990	372'371		1'260
1995	1'119'235		1'462
2001	5'293'732		No data available
2002	6'201'195		No data available
2003	11'249'212	2.5	1'730
2004	12'128'386	2.6	1'859
2005	11'766'768	2.7	1'894
2006	12'345'314	2.8	1'710
2007	11'988'044	2.7	1'776
2008	No data available		No data available
2009* (See editors' note)	12'001'724	2.9	2'129
2010-11	11'199'577	2.7	1'775
2011-12	11'542'109	2.7	1'865

Sources: 1990-1995: Estimates by Hassall and Associates 1995; 2001-2007: AQIS (adapted by E.Wynen); 2009: AQIS (adapted by A. Mitchell et.al.); 2010-11: ABS (2012), 2011-12: Estimations made on changes reported by certification agencies data.

*Editors' note: For the FiBL-IFOAM survey on organic agriculture world-wide, we continued to use the AQIS data for 2009 – based on information of the certifiers - for the sake of consistency. We expect data based on information of the certifiers to be available for 2013.[2]

[1] School of Rural Science and Agriculture, University of New England, Armidale, NSW Australia.

[2] According to Wynen and Mitchell (2013), the figures from AQIS and those from ABS represent data from different sources, and are therefore not strictly comparable. There are limitations with both methods of data collection. In the data provided to AQIS by the certifiers at least two sources of potential inaccuracies are present. The first limitation arises when certifiers are not willing to provide data. This has meant that, in the past, a small part of the values was based on assumptions, instead of having been supplied. The second limitation is the possibility that some producers were certified by more than one certifier. Thus, double counting may have occurred especially in the years before 2009. On the other hand, the ABS census - which takes place only every five years - counts only those primary producers with an income from agricultural activities of more than 5'000 Australian dollars per year. That is, some certified organic farmers –who could be seen perhaps more as 'hobby-farmers' but were counted under the AQIS scheme - are not counted in the ABS census.

According to the authors, a slight rise in the 2011-12 period notes land area at 11.5 million hectares, up 0.4 million hectares from 2010-11 recorded by ABS.

Crude adjustments based on corrections from 2010-11 ABS figures show 1'865 agricultural businesses certified, a slight rise from the previous reporting period.

Communications with certification bodies has noted significant swapping of clients from one certifier to another, and this has made it difficult to ascertain true numbers of organic agribusinesses and the area farmed. Adjustments have been made based on applications of new entrants to organic certification.

Standards, certification and industry structures

There have been no significant changes to the administration of domestic standards and certification procedures, with the Commonwealth Department of Agriculture, Fisheries and Forestry (DAFF) retaining the responsibilities for The Export Control (Organic Produce Certification) Orders that prohibit the export of organic produce unless an organic produce certificate has been issued under these orders for the produce.

Organic and bio-dynamic produce for export must be certified by an approved certifying organisation, verifying that the produce has been prepared in accordance with the National Standard for Organic and Bio-Dynamic Produce. Audited certifying organisations - if approved - are issued with a quality management certificate from DAFF, which allows them to issue export certificates.

In 2013 seven certification agencies continue to be accredited by DAFF, with the well-known entity of Biological Farmers of Australia changing its name to Australian Organic Ltd, retaining the certification arm of Australian Certified Organic (ACO).

Market

Independent market analysis undertaken by IBISWORLD notes that organic farming has been one of the economy's best performing industries over the past five years. Over the five years through 2013-14, the industry revenue (value of production) is expected to grow by an annualised 12.1 percent. Revenue is forecast to reach 655.3 million Australian Dollars (AUD) [1] in 2013-14, up 11.2 percent from the previous year.

IBISWorld anticipates revenue for Australia's organic farming to increase by 13.7 percent over 2014 on the back of strong consumer demand, with revenue expected to reach 707.7 million Australian dollars.

Previous reports in "The World Organic Agriculture" have noted the limitations of cross-comparison of data sources.

According to the ABS data in 2010-11, beef made up almost 20 percent of the total market (including organic and non-organic products on certified properties). Certification agencies noted an increase in the number of beef producers signing up for certification in late 2013 with an estimated area of upwards of 100'000 hectares going into certification in the 2014 period. One certifier alone noted a 25 percent increase in applications for beef producers in the last two years (ACO, pers comm, 2013).

[1] 1 euro = 1.2407 Australian dollars (average exchange rate 2012); Source: European Central Bank at http://sdw.ecb.europa.eu/browse.do?node=2018794

Table 60: Australia: Values of organic production: 2001-2013

Year	Farm-gate			Retail	Source
	Total (AUD million)	Beef as share of total (%)	Crops as share of total (%)	Total (AUD million)	
2000-01	89	36.0	51.0	106	Wynen (2003)
2003	140	40.9	49.5		Halpin (2004)
2007	231.5	13.7	57.7	623	Kristiansen et al. (2008)
2009	223.2	15.4	58.2	947	Mitchell et al. (2010)
2010-11[1]	432.2	19.5	40.5	1'1506	ABS (2012), Monk et al (2102)
2013-14[2]	655.3	n.a.	n.a.	n.a.	IBISWorld (2013)

Notes: [1] Figures are for all produce sold, including those produced and/or sold on the conventional market; [2]Projected estimate; NA = not available.

In total for 2012, around half of the returns from organic holdings was derived from livestock – including livestock products such as wool, milk and eggs (totalling 15 percent), sheep and lamb (5.4 percent) and poultry (8.2 percent). Fruit, vegetables and grains took up just over 40 percent, with the crops making up just under half of the total value. Certification and retail businesses do not report any significant change to this in the past reporting period.

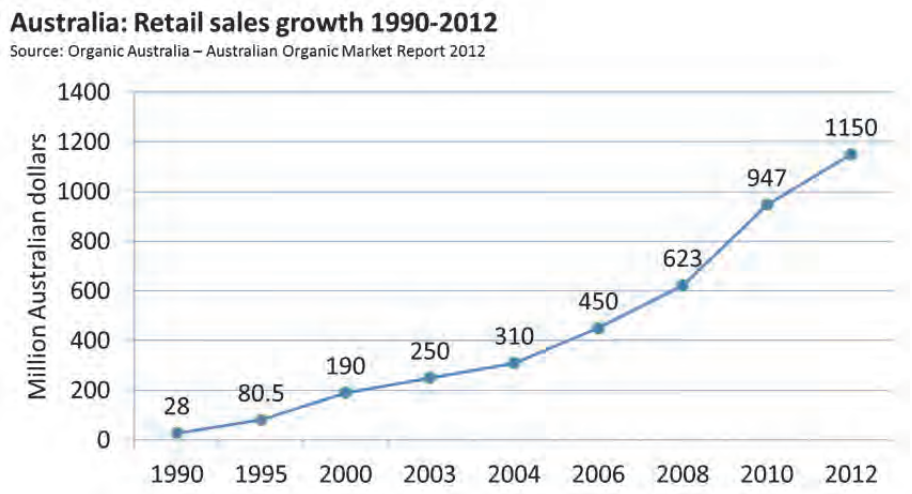


Figure 84: Australia: Retail sale growth 1990-2012

Source: Organic Australia– Australian Organic Market Report 2012.

Employment

It is estimated that the industry currently employs 8'594 people across 2'153 businesses either directly or indirectly associated with organic farming (IBISWORLD, 2013). The organic industry as a whole continues to be more labour-intensive than conventional farming.

The organic farming industry invests significantly on human resources. In 2013-14, the average enterprise will spend an estimated 2.37 AUD on wages and associated labour costs for every Australain dollar it spends on capital investments. However, over the five years through to 2013-14, the industry has gradually become more capital-intensive as the average size of farms has increased and operators have invested more heavily in productive technology.

Research and extension

In an attempt to increase organic production for meat production, Australian beef producers can now access assistance to convert to organic status. Jointly funded by Meat & Livestock Australia via the MLA Donor Company and meat exporters Australian Organic Meats Group, the project aims to provide benchmarking information and also training and assistance through the certification process.

In the context of very limited government support for organic farming, Organic Trust Australia - Research and Education (OTARE), an independent, non-profit organisation formed in 2009 by the Organic Federation of Australia, continues to develop opportunities for co-funding of projects through sponsorships, donations and support for grant applications. A Travel Grant scheme was established in 2013 to provide support for postgraduate students to attend a conference to present their research.

The *Journal of Organic Systems* (http://www.organic-systems.org) began its eighth year of publication as a peer-reviewed scholarly journal in which researchers could publish their findings on 'Organic Systems' across a wide range of discipline areas. While the original aim was to focus on the Australasian and Pacific Regions, in recent years the journal has broadened its scope, publishing papers from Africa, the Middle East, South Asia and Europe. It is operating in an increasingly competitive niche within academic publishing as new journals emerge with a focus on organic systems, such as *Organic Agriculture* (Springer) and *Organic Farming* (Librello).

References

Australian Bureau of Statistics (2012), Customised Report to DPIPWE. Department of Primary Industries, Parks, Water and Energy, Hobart.

Australian Organic Meats, (2013) AOM Group and MLA Join Forces. Australian Organic Meats Group, Elong Elong. (www.aom.net.au/_blog/Latest_News/post/aom-group-and-mla-join-forces/)

Halpin, D. (2004), 'A farm-level view of the Australian organic industry' in DAFF, The Australian Organic Industry: A Profile, Department of Agriculture, Fisheries and Forestry, Canberra.

IBISWorld (2013), Organic Farming in Australia: Market Research Report (ANZSIC X0013). IBISWorld, Melbourne.

Kristiansen, P. and Smithson, A. (2008), Australian Organic Market Report 2008, Biological Farmers of Australia, Brisbane.

Mitchell, A., Kristiansen, P., Bez, N. and Monk, A. (2010), Australian Organic Market Report 2010, Biological Farmers of Australia, Chermside.

Monk, A., Mascitelli, B., Lobo, A., Chen, J. and Bez, N. (2012), Australian Organic Marketing Report 2012, Biological Farmers of Australia, Chermside.

Wynen, E. (2003), Organic Agriculture in Australia - Levies and Expenditures. RIRDC, Canberra.

EWynen, E. and Mitchell (2013): Organic Farming in Australia,. In: FiBL & IFOAM 2013: The World of Organic Agriculture. Staistics and Emerging Trends. Bonn and Frick

The Pacific Islands

KAREN MAPUSUA[1]

Recent developments

The Pacific Organic and Ethical Trade Community (POETCom), which is the peak body of the organic and fair trade movement in the Pacific region, established its secretariat in the Land Resources Division of the Secretariat of the Pacific Community in Suva Fiji in 2012, with funding support from the European Union under the Increasing Agricultural Commodities Trade (IACT) project. This has enabled steady progress with coordinated development across the region. The year 2012 also saw the Pacific Organic Standard welcomed into the IFOAM Family of Standards, and the Pacific's second Participatory Guarantee System; *Bio Fetia* from French Polynesia, registered to use the "Organic Pasifika" Mark.

A significant development in 2012 was the resolution at the bi-annual meeting of the Heads of Agriculture and Forestry Services (HOAFS) for the Pacific Islands[2] to "promote and mainstream organic agriculture into the Secretariat of the Pacific Community (SPC) and national agriculture strategies in recognition of its role in food and nutritional security, climate change adaptation and mitigation, enhancement of biodiversity and the livelihood opportunities it can provide".

The Ministers of Agriculture then endorsed this resolution in the Communiqué following their meeting in Nadi (Fiji Islands) in September 2012.

In 2013, the International Fund for Agricultural Development (IFAD) began a collaboration with the Pacific Organic and Ethical Trade Community (POETCom) to develop models for Participatory Guarantee Systems in the Pacific. Three pilot PGS focusing on specific products (virgin coconut oil, coco sap sugar, and papaya) are currently under development. Two of these PGS are in very isolated and remote islands and involve certification of the entire island. They engage the entire community and work with traditional leadership to develop appropriate and effective structures.

Figure 85: Organic Pasifika PGS logo

[1] Karen Mapusua, Coordinating Officer, Pacific Organic and Ethical Trade Community (POETCom), Increasing Agricultural Commodities Trade (IACT), Land Resources Division, Secretariat of the Pacific Community, Private Mail Bag, Suva FIJI, www.spc.int

[2] The Heads of Agriculture and Forestry Services (HOAFS) meet every 2 years and consist of the Agriculture departments heads from the 22 SPC island countries and territories. The Ministers of Agriculture and Forestry (MOAF) meet every 4 years.

The year 2013 also saw developments in the implementation of the export support scheme as part of the Pacific Organic Guarantee Scheme. An MOU was signed between the Pacific Organic and Ethical Trade Community (POETCom) and three certifying bodies: BioAgricert (Italy), Biogro (New Zealand), and the National Association of Sustainable Agriculture Australia, to provide certification services to the Pacific Organic Standard. This agreement allows Pacific producers to export under the Pacific Organic Standard for the first time and allows commencement of the marketing of a regional organic brand "Organic Pasifika".

History

Organic agriculture is not a new concept in the Pacific; it is very much the traditional farming system that Pacific forefathers have practiced sustainably for centuries. Today, current farming practices in many communities are still based on "age-old" systems that are free from the residues of agrichemicals and where environmental integrity remains largely intact. However, the motives for organic farming have changed. In the past, farming was predominantly for subsistence living, but in the cash driven societies that we live in today, there is a need from overseas markets that products that are labelled and sold as organic produce meet international standards. While third party certification began in the Pacific in the late 1980s, it has been slow to develop.

Fiji, Sigatoka Valley. Photo: Karen Mapusua

The organic movement in the Pacific recognized that one of the major challenges facing Pacific Island organic producers is the high cost of certification, auditing and compliance involved in meeting the organic and/or international standards of the importing country. Two projects, commencing in 2007 and funded by the International Fund for Agricultural Development, with one implemented by the International Federation of Organic Agriculture Movements (IFOAM) and the other by the Secretariat of the Pacific Community (SPC), have been undertaken to address this issue. These projects facilitated the development of a regional strategy and national plans to lay the foundation of sustainable organic agriculture development in the region.

The main outcomes of these projects were:

– An analysis of the existing situation of organic agriculture and fair trade production in the Pacific islands, and
– Creation of a set of Pacific Regional Standards for Organic Agriculture Products, which was developed through a locally owned process and multi-sector participation.

Two key groupings that were tasked with driving organics forward in the Pacific were formed:

– The first group, the Regional Organic Task Force (ROTF), is a technical group representing all sectors and countries involved in organics. This group was charged with developing the Pacific Standard and will be responsible for implementing the Regional Action Plan.
– The second group, the Pacific High Level Organics Group (PHLOG), consists of Pacific leaders who have shown a commitment to organics development in the region and provide high level political support and advocacy.

The first Pacific Organic Standard was officially launched by the Chair of the Pacific High Level Organics Group (PHLOG) and Prime Minster of Samoa, at the Ministers' of Agriculture and Forestry Conference in Apia Samoa in September 2008. This now provides a platform for further regional policy development around organics.

In 2009, the Regional Organic Task Force (ROTF) recognized the need to evolve from a technical body to a representative peak body for organics and fair trade in the region and so the Pacific Organic and Ethical Trade Community (POETCom) was formed. POETCom will remain housed in the Secretariat of the Pacific Community and is currently in the process of developing its governance and management structure. A coordinating officer for POETCom is now in place within the funded by the European Union through the Increasing Agricultural Commodities Trade project.

Mixed system, pineapple, black pepper, banana, cabbage and beans (far right), legume cover crop and nitrogen fixing trees. Photo: Karen Mapusua

Key actors

Developments in organic agriculture are spearheaded by the Pacific High Level Organics Group (PHLOG), the Secretariat of the Pacific Community (SPC), the Pacific Organic and Ethical Trade Community (POETCom) and the POETCom members: lead organic organizations/NGOs in each Pacific Island country including:

- BioCaledonia, New Caledonia
- Bio Fenua, French Polynesia
- Farm Support Organisation, Vanuatu
- Fiji Organic Association, Fiji
- Kastom Gaden Association, Solomon Islands
- Zai Na Tina Organic Demonstration Farm, Solomon Islands
- Niue Organic Farmers Association
- Pacific Spices, Papua New Guinea
- Palau Organic Farmers Association, Palau
- Titikaveka Growers Association, Cook Islands
- Tonga National Youth Congress, Tonga
- Women in Business Development Incorporated, Samoa

The organic movement remains driven by farmers and farm support organizations, with support building from national governments, as awareness of the potential for organics increases. Regional research and academic institutions, including the University of the

South Pacific and the National Agricultural Research Institutes of Papua New Guinea, are also engaged.

Exports

Most of the organically certified products from the region are produced for export. The main crops, which are currently organically certified and exported from the Pacific region are listed in Table 61.

Table 61: Pacific Island: Export products

Products	Countries
Vanilla, ginger & other spices & nuts	Fiji, Vanuatu, Niue, Samoa
Cocoa	Vanuatu, Samoa, PNG
Virgin Coconut Oil	Samoa, Fiji, Solomon Islands
Coconut meal	Vanuatu
Nonu /noni (Morinda Citrifolia)	Cook Islands, Samoa, Fiji, Niue, French Polynesia
Honey	Niue
Papaya (pawpaw)	Fiji
Bananas	Fiji, Papua New Guinea, Samoa
Coffee	Papua New Guinea, Samoa
Beef	Vanuatu

The main international markets for the exported organic products are Australia and New Zealand due to their proximity. Japan is a growing market, and other markets include North American and the European Union.

There is growing interest and activity in the area for fair trade programmes and certification. Efforts are being made by the Pacific Organic and Ethical Trade Community (POETCom) to link organic producers into these systems as a way of adding further value to products and ensuring maximum benefits to the farmers. There is also interest in the region for identifying trading models outside the well-known fair trade certifications that may be better suited to Pacific communities and producers. For example, Heilala Vanilla; a Tongan/New Zealand vanilla exporter, has recently established a community development trust and a percentage of each sale is channelled into the trust for community development projects in the areas where they buy vanilla. This is in addition to their long term buying arrangements and above market rate price to farmers.

Domestic Markets

Generally, the domestic markets for certified organic products are not very developed and in some cases are non-existent. Organic products are commonly sold as conventional without a price premium or any acknowledgement of the organic status of the product. Some initiatives to promote awareness of consumers about organic products are ongoing or are in the pipeline, such as iniatives aiming to link the concept of organic with local food consumption as part of strategies to reduce non-communicable diseases, which are a major health issue in the Pacific Islands. Interesting opportunities are also being explored within the tourism structures of several countries that are facing a growth in the number of tourists (e.g. Fiji, Vanuatu, Cooks and Samoa),

such as focusing on development of a Pacific cuisine and linking small holder organic farmers directly with tourist and hospitality providers. There is at least one up market resort in Fiji that has their island organically certified and who commits to serving guests organic produce from their land.

The growth in interest in Participatory Guarantee Systems (PGS) in several countries also implies that there is an opportunity for further development of domestic markets. The acceptance of PGS certification across the region may also enhance the development of regional trade in organic goods.

Legislation

Despite the policy brief on organic agriculture of the Secretariat of the Pacific Community (SPC) that was developed in 2009, there have been no significant changes in legislation in the region. The policy brief aims to assist Governments and others in the region to develop relevant policy focuses on how organic agriculture can assist in meeting regional challenges and outlined seven initial policy recommendations.

Organic agriculture is increasingly gaining mention and recognition in national policy and planning documents, such as the recent "Over-arching sector plan for productive industries" in Vanuatu and the Solomon Islands Organic Policy, but this has not evolved into legislation. Once again, there are resource constraints at national levels in moving this agenda forward, but the recent endorsements of organics by the Heads of Agriculture and Forestry Services (HOAFS) and Ministers of Agriculture and Forestry (MOAFS) may provide further impetus for this development.

Government and international support

The Secretariat of the Pacific Community (SPC), as a regional intergovernmental organization, continues to provide some basic support for coordination and now houses the secretariat of the Pacific Organic and Ethical Trade Community (POETCom), but the need for developing a longer term financing strategy to support the movement is critical.

In 2013, POETCom received development assistance from the European Union, the International Fund for Agricultural Development (IFAD), the French Pacific Fund and the United Nations Development Programme, which was predominantly for training and capacity building activities at country level.

POETCom national affiliates continue to receive assistance from partners such as OXFAM New Zealand, Canada Fund, UNDP small grants programmes, and bilateral donor assistance from Australia and New Zealand. In a few cases, national governments also provide financial support. One example is the Government of Samoa, that funds the costs of third party certification for the country's largest organic smallholder group through Women in Business Development Inc.

Outlook

With a boost in resources for the Pacific Organic and Ethical Trade Community (POETCom) to implement activities and move towards the goals articulated in the Strategic Plan 2013–2017, momentum for growth in the organic sector has increased through 2013. As governance and management structures are strengthened, and with

the implementation of the Pacific Organic Guarantee System; in particular the elements of PGS, and the export certification scheme and regional organic branding continues through 2014, the growth and momentum are likely to continue. The decision by the Heads of Agriculture and Forestry Services (HOAFS) and the Ministers of Agriculture and Forestry (MOAF) to mainstream organics into agriculture strategy development and planning also provides a solid base for continued expansion of the organic sector in the Pacific Islands.

Links/Further reading

- Secretariat of the Pacific Community, www.spc.int
- POETCom web pages, http://www.spc.int/lrd/index.php?option=com_content&view=article&id=745&Itemid=495
- Pacific Organic Standard, http://www.spc.int/lrd/lrd/New_LRD_Publications.htm
- Putting Down Roots; POETCom Annual Report 2012, http://www.spc.int/lrd/index.php?option=com_docman&task=cat_view&gid=371&Itemid=517
- Growing Our Future POETCom Strategic Plan 2013 – 2017 http://www.spc.int/lrd/index.php?option=com_docman&task=cat_view&gid=365&Itemid=517

Oceania: Current statistics

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

Organic agricultural land

Organic agricultural land in Oceania stayed at 12.2 million hectares in 2012, and constituted 2.9 percent of the total agricultural area in the region. Thirty-two percent of the world's organic agricultural land is in Oceania. The area under organic production has more than doubled sice 2000 (5.3 million hectares). Between 2011 and 2012, the area increased in some countries such as French Polynesia, Tonaga, and Vanuatu, by a modest amount of almost 2'400 hectares. No new data were reported from Australia; see also chapter about organic farming in Australia on page 257.

The country with the biggest organic agricultural area is Australia with 12 million hectares, and the highest proportion of organic agricultural land is in Samoa with more than 10 percent of all farmland under organic cultivation.

Land use

In 2012, 96 percent of all organic farmland in Oceania was grassland/grazing areas (11.7 million hectares). Detailed data on land use categories, and arable and permanent crops was however not available for most of the countries.

Producers

There were more than 14'500 producers in the region, with the largest number of producers in Papua New Guinea (9'185), Australia (2'129 producers; 2009), and New Zealand (987 producers).

Market

In 2012, market data was only available for Australia, New Zealand and Samoa (2010). The total organic market value (the sum of these three countries) was almost 1.1 billion euros. The largest market was Australia with almost 1 billion euros. The annual organic consumption is 44 euros per person in Australia and 18 euros per person in New Zealand.

For more information see data tables, page 271.

[1] Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[2] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[3] Bernhard Schlatter, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

Organic Agriculture in Oceania: Graphs

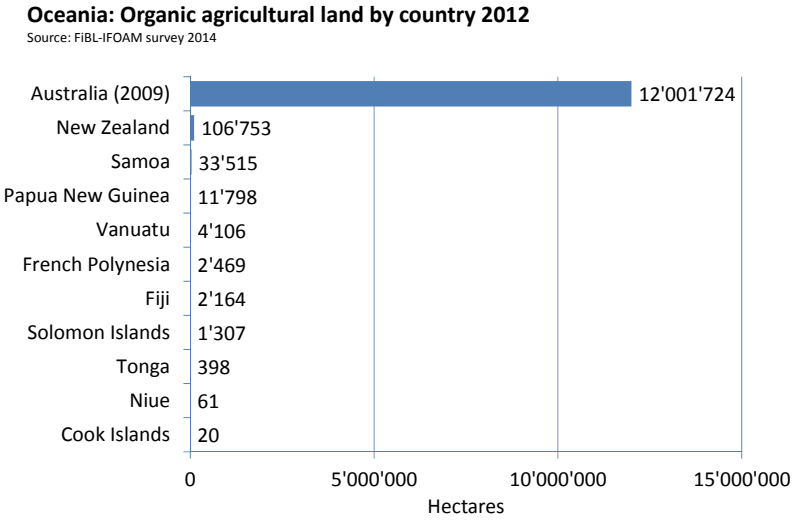


Figure 86: Oceania: Organic agricultural land by country 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

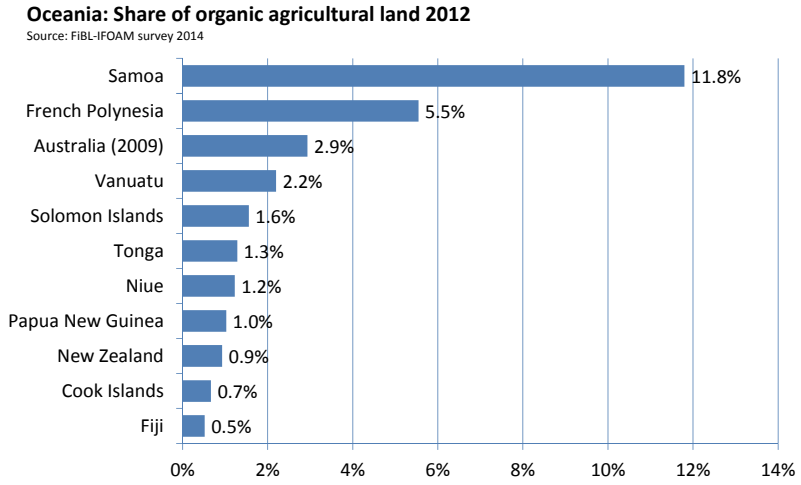


Figure 87: Oceania: Share of organic agricultural land 2012

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Oceania: Development of organic agricultural land 2000-2012

Source: FiBL-IFOAM-SOEL 2002-2014

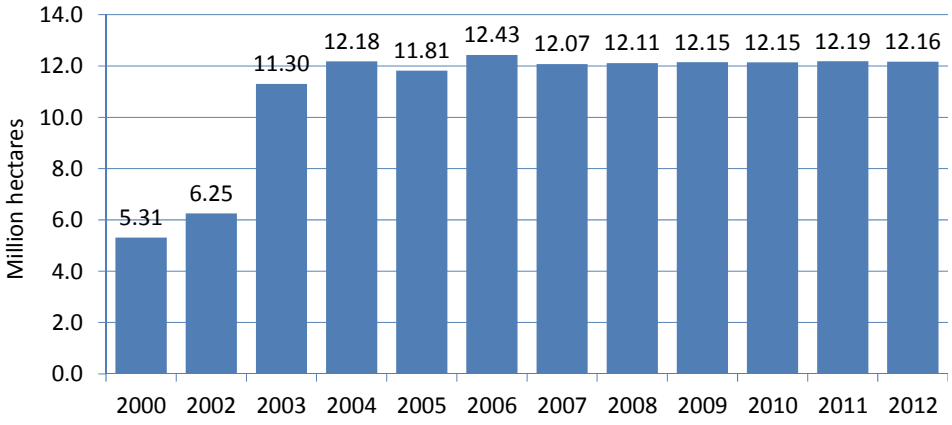


Figure 88: Oceania: Development of organic agricultural land 2000-2012

Source: FiBL-IFOAM –SOEL 2002-2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Organic Agriculture in Oceania: Tables

Table 62: Oceania: Organic agricultural land, share of total agricultural land and number of producers 2012

Country	Area [ha]	Share of total agr.land	Producers
Australia	12'001'724	2.93%	2'129
Cook Islands	20	0.67%	44
Fiji	2'164	0.52%	171
French Polynesia	2'469	5.55%	No data
New Zealand	106'753	0.93%	987
Niue	61	1.23%	122
Papua New Guinea	11'798	1.03%	9'185
Samoa	33'515	11.80%	743
Solomon Islands	1'307	1.56%	384
Tonga	398	1.28%	123
Vanuatu	4'106	2.20%	696
Total	**12'164'316**	**2.88%**	**14'584**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Table 63: Oceania: All organic areas 2012

Country	Agricultural land [ha]	Wild collection [ha]	Tota [ha]
Cook Islands	20		20
Fiji	2'164	653	2'817
French Polynesia	2'469		2'469
Niue	61	112	173
Papua New Guinea	11'798		11'798
Samoa	33'515		33'515
Solomon Islands	1'307		1'307
Tonga	398		398
Vanuatu	4'106		4'106
Total	**55'839**	**765**	**56'604**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Table 64: Oceania: Land use in organic agriculture 2012

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		281'283
Arable crops	Arable crops, no details	34'207
	Cereals	2'724
	Medicinal and aromatic plants	110
	Oilseeds	217
	Protein crops	18
	Strawberries	15
	Vegetables	1'388
Arable crops total		38'679
Cropland, no details	Cropland, no details	46'269
Permanent crops	Berries	15
	Citrus fruit	480
	Cocoa	31
	Coconut	3'521
	Coffee	11'249
	Fruit	12
	Fruit, temperate	1'270
	Fruit, tropical and subtropical	454
	Grapes	2'782
	Nuts	8'800
	Olives	470
	Other permanent crops	34'806
Permanent crops total		63'891
Permanent grassland/grazing areas		11'734'194
Total		**12'164'316**

Source: FiBL-IFOAM survey 2014; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 286.

Outlook: It is time for Organic 3.0!

It is time for Organic 3.0!

MARKUS ARBENZ[1]

Organic production and consumption have grown continuously over the past decades, yet statistics show that organic market shares are still very small. The fulfillment of the organic ambition of making a relevant contribution to global environmental and social challenges, and changing the present paradigm of the industrialization of agriculture, requires a new strategy: *"Organic 3.0"*.

Organic pioneers[2] of various backgrounds laid the foundations of organic agriculture *(Organic 1.0)*. The last decades (*Organic 2.0*) have seen organic agriculture develop into the organic sector we know today. *Organic 2.0* is characterized by practical implementation, the marketing of organic products, and the development of private and government standards and labels. Today, certified organic agriculture exists in 164 countries. Progress in scientific research and farmers' knowledge management have in turn led to significant developments in agricultural practices. The organic movement has thus given rise to a multitude of decentralized and independently operating institutions.

Organic agriculture has great development potential as THE strategic pathway to sustainable agriculture. But making use of these opportunities requires a step towards *Organic 3.0* and a strong foothold in civil society, politics, and economy. With a view to the future development of Organic 3.0, it is first of all necessary to analyze changing conditions worldwide. Organic producers, traders, and processors have to unite and together tackle the task of developing concepts for the organic agriculture of the future. Concepts that support sustainability, allow growth without compromising on quality, and, at the same time, increase the credibility of organic systems among consumers.

IFOAM – together with BIOFACH and the German Organic Movement – has identified three key issues that should be addressed first in developing Organic 3.0: **Resources**, **Impact,** and **Transparency.** We also suggest using the **UN International Year of Family Farming**[3] as a framework for discussions on the further development of Organic 3.0.

The issue of resources

The question of how people nourish themselves with limited resources was essentially already laid out in *Organic 1.0* and *2.0*. Yet, new challenges call for fresh impetus, and we as stakeholders need to ask ourselves some fundamental questions on resource efficiency and eating habits. We are particularly concerned about the access of farming families to land (keyword 'landgrabbing'), water, seeds (keywords 'patenting', 'erosion of farmers' rights'), knowledge (practical and scientific), capital, and income. These preconditions are equally important for the sustainability and wellbeing of farmers as

[1] Markus Arbenz, Executive Director, International Federation of Organic Agriculture Movements (IFOAM), Bonn, Germany, www.ifoam.org
[2] For example Albert Howard (GB), Rudolf Steiner (D, A, CH), Hans & Maria Müller (CH), Jerome Rodale (USA), Eve Balfour (GB), Rachel Carson (USA), Masanobu Fukuoka (Japan), Anna Primavesi (Brazil) and Bashkar Save (India).
[3] http://www.un.org/en/ga/search/view_doc.asp?symbol=A/RES/66/222

they are for securing supply to the value chain, and the reduction of risks in an increasingly complex world.

The issue of impact

Organic 2.0 is guided by the guaranteeing of processes that we regulate in great detail. Through certification, we have built consumer trust and a sense of security, which will continue to be of importance in the future. Yet, in the future we would like to be guided even more by the overall impact of our actions.

Organic agriculture seeks resilient natural resources, sound economic structures, fair societies, rich traditions, and effective structures. Holism, integrity of systems and people (especially disadvantaged people in rural populations), are at the center of *Organic 3.0*. We stand for the sustainability of family farms and aim to address the most pressing global challenges of our time, above all poverty, hunger, loss of biodiversity, and climate change.

Much has been achieved. Diverse and comprehensive examples of positive ecological and social impacts have already been broadly documented. Still, the goal of having a sustainable agriculture and food system is still distant. An important development step lies ahead of us, if we are to have a greater impact. This is why we are actively highlighting the solution-offering potential of organic agriculture on a global level. We are looking for new ideas and alliances with those who represent similar concerns from a diversity of standpoints.[1] This encompasses non-certified organic agriculture as a supply source for the broader family network, participatory guarantee systems for local trade, and urban agriculture or aquaculture, all of which are additional and important elements for facilitating the mainstreaming of organic agriculture and for increasing its broad greater uptake in society. We want to enable the application of more sustainable practices when producing food products, textiles, cosmetics, and beyond (e.g. energy, woods, natural remedies etc.).

The issue of transparency

We want to develop organic agriculture further within civil society and explain it anew to people. At the same time, we want to very clearly set ourselves apart from green washing. New media, new consumer, interests and societal trends are changing the market. In the future, a multitude of small and micro-markets will emerge, where, thanks to new media, producers and consumers will meet. Quality and production properties will become more individualized, and transparency will not only be a question of certification, but also of direct information exchange. Transparency will also be given through new analytic methods, allowing end products to be tested.

Authenticity requires comprehensive explanations but also transparent production chains. We want to address this and other questions such as price transparency, insetting of negative and positive externalities, and the fairness of the systems.

[1] E.g. fair trade, slow food, small farmers, development programs, research, decision makers of the economy and politics, media, advocacy of "Urban Gardening" etc.

Key moments 2014 for Organic 3.0

Organic agriculture is still a niche with less than 1 percent of agricultural land worldwide. However, there are successes to be noted, such as 20 percent of agricultural land in Austria being organic, a 100 percent organic policy in some Himalayan states, the majority of cacao exports from Dominican Republic being organic, and organic market shares of 20 percent for eggs and fresh bread in Switzerland. In some countries, more than 80 percent of baby food is organic. These examples out of Organic 2.0 indicate that we have not yet reached the limits. Further growth is needed to achive the objective of organic agriculture being the viable alternative to environmental and social challenges. However mainstreaming requires new and creative strategies.

It is time for Organic 3.0. Think tanking for Organic 3.0 can take place anytime and anywhere, based on personal and institutional commitments and on inspirations from active stakeholders. Lead events are **BIOFACH** Nuremberg, which will launch the Organic 3.0 discussion, while all other BIOFACHs in Sao Paulo, Shanghai, Tokyo, Baltimore, and Bangalore will regionalize and further develop the ideas. The **18th IFOAM Organic World Congress (OWC)** and the **IFOAM General Assembly** in October 2014 in Istanbul, Turkey are great opportunities to bring these new ideas together and to highlight the results reached in decentralized discussions. The two *"Main Tracks"* in the OWC titled: A) *Organic Vision Building - Common development of the future values, principles and positions for concerted action,* and B) *Growing the Organic World - Development of common guidance for the decentralized building of the Organic future,* analyze the present situation, debate issues, develop strategies, and build action plans in 16 structured discussion sessions.

We look forward to greeting you there and shaping Organic 3.0 even further.

Annex

The FiBL-IFOAM Survey: Overview Table

Table 65: Organic agricultural land, share of total agricultural land, number of producers, and domestic sales 2012

For detailed data sources see annex.

Country	Area [ha]	Share of all agr. land	Producers[1]	Retail sales [Mio €]
Afghanistan	61 (2009)	0.0002%	264 (2011)	No data
Albania	515	0.04%	46	No data
Algeria	700	0.002%	57	No data
Angola	2'486	0.004%	2	No data
Argentina	3'637'466	2.59%	1'446	No data
Armenia	810	0.05%	24	No data
Australia (2009)	12'001'724	2.93%	2'129	927 (2012)
Austria	533'230	19.70%	21'843	1'065 (2011)
Azerbaijan	23'740	0.50%	297	3
Bangladesh	6'860	0.07%	9'337	No data
Belarus	Wild collection only		3	
Belgium	59'718	4.36%	1'413	417
Belize	1'860	1.22%	1'291 (2011)	No data
Benin	2'628	0.08%	3'269	No data
Bermuda	Processing only			
Bhutan (2011)	6'156	1.21%	No data	No data
Bolivia	32'710	0.09%	9'837	No data
Bosnia and Herzegovina	343	0.02%	25	1 (2010)
Brazil	705'233	0.27%	12'526	570
Bulgaria	39'137	1.28%	2'754	7 (2010)
Burkina Faso	15'000	0.13%	11'265	No data
Burundi	550	0.03%	36 (2010)	No data
Cambodia	9'055	0.16%	5'818	No data
Cameroon	663	0.01%	88	No data
Canada	833'883	1.23%	3'590	2'136
Chad	Wild collection only			
Channel Islands	250	2.84%	No data	No data
Chile	22'636	0.14%	446 (2011)	2 (2009)
China	1'900'000	0.36%	No data	791 (2009)
Colombia (2011)	34'060	0.08%	4'775	No data
Comoros	2'642	1.70%	1'416 (2011)	No data

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

Annex: Table: Organic Agricultural Land, Producers, Domestic Sales

Country	Area [ha]	Share of all agr. land	Producers[1]	Retail sales [Mio €]
Cook Islands	20	0.67%	44	No data
Costa Rica	9'360	0.52%	3'000 (2009)	1 (2008)
Côte d'Ivoire	19'457	0.10%	277	No data
Croatia	31'903	2.41%	1'528	104
Cuba	5'280	0.08%	7	No data
Cyprus	3'923	2.69%	719	2 (2006)
Czech Republic	488'658	11.50%	3'934	66 (2011)
Democratic Republic of the Congo	51'838	0.23%	1'123 (2008)	No data
Denmark	194'706	7.36%	2'651	887
Dominica (2011)	240	0.98%	No data	No data
Dominican Republic	168'978	8.68%	24'099	No data
Ecuador	56'303	0.75%	9'485 (2011)	No data
Egypt	82'167 (2010)	2.23%	790 (2009)	No data
El Salvador	6'736 (2008)	0.44%	2'000 (2007)	No data
Estonia	144'147	15.25%	1'478	20 (2011)
Ethiopia	164'777	0.46%	134'626	No data
Falkland Islands (Malvinas)	403'212	36.34%	8	No data
Faroe Islands	253	8.43%	1	No data
Fiji	2'164	0.52%	171	No data
Finland	197'751	8.65%	4'322	202
France	1'032'941	3.76%	24'425	4'004
French Guiana (France)	2'407	10.60%	33	No data
French Polynesia	2'469	5.55%	21	No data
Georgia (2011)	1'999	0.08%	150	No data
Germany	1'034'355	6.19%	23'032	7'040
Ghana	28'161	0.18%	1'915	No data
Greece	462'618	5.59%	23'433	60 (2010)
Grenada	85	0.68%	3 (2010)	No data
Guadeloupe (France)	164	0.39%	33	No data
Guatemala	13'380 (2011)	0.30%	3'008 (2010)	No data
Guinea-Bissau	Wild collection only			
Guyana (2009)	4'249	0.25%	74	No data
Haiti	806	0.04%	393	No data
Honduras (2011)	24'950	0.78%	4'989	No data
Hungary	130'609	3.09%	1'560	25 (2009)
Iceland	8'240	0.36%	35	No data
India	500'000	0.28%	600'000	130
Indonesia	88'247	0.16%	6'627	No data
Iran (Islamic Republic of)	42'634	0.09%	6'100	No data
Ireland (2011)	54'122	1.31%	1'400	99

Country	Area [ha]	Share of all agr. land	Producers[1]	Retail sales [Mio €]
Israel	6'187	1.18%	418	No data
Italy	1'167'362	9.12%	43'852	1'885
Jamaica (2009)	542	0.12%	80	No data
Japan	10'611	0.27%	2'130	1'000 (2009)
Jordan	2'895	0.28%	98	No data
Kazakhstan	291'203	0.14%	No data	No data
Kenya	4'894	0.02%	12'647 (2011)	0.3 (2008)
Kosovo	111	0.03%	No data	No data
Kyrgyzstan	2'696	0.03%	1'172	No data
Lao(PDR) (2011)	5'990	0.26%	1'342	No data
Latvia	195'658	10.77%	3'496	4 (2011)
Lebanon	3'303	0.48%	181 (2011)	No data
Lesotho	617	0.03%	3	No data
Liechtenstein	1'086	29.60%	35	5
Lithuania	156'539	5.40%	2'527	6 (2011)
Luxembourg	3'924	3.00%	102	75
Madagascar	30'265	0.07%	14'550 (2011)	No data
Malawi	35	0.001%	4 (2010)	No data
Malaysia	603	0.01%	119	No data
Mali	14'927	0.04%	13'533	No data
Malta	26	0.22%	9 (2011)	No data
Martinique (France)	200	0.71%	30	No data
Mauritius	16	0.02%	3 (2011)	No data
Mexico	487'393	2.27%	169'707	21 (2008)
Moldova (2011)	22'102	0.89%	172	No data
Montenegro	3'068 (2011)	0.60%	62 (2010)	0.1 (2010)
Morocco	16'600	0.06%	120 (2010)	No data
Mozambique	3'840	0.01%	6	No data
Myanmar	897	0.01%	15	No data
Namibia (2011)	14'123	0.04%	7	No data
Nepal	10'273	0.12%	247 (2011)	No data
Netherlands	48'038	2.49%	1'646	791
New Zealand	106'753	0.93%	987	82
Nicaragua (2009)	33'621	0.65%	10'060	No data
Niger	106	0.0002%	2	No data
Nigeria	9'521	0.01%	597 (2011)	No data
Niue	61	1.23%	122	No data
Norway	55'260	5.10%	2'590	209

Annex: Table: Organic Agricultural Land, Producers, Domestic Sales

Country	Area [ha]	Share of all agr. land	Producers[1]	Retail sales [Mio €]
Occupied Palestinian Territory (2010)	6'354	1.73%	832	No data
Oman	38 (2011)	0.002%	4 (2010)	No data
Pakistan	22'397	0.09%	105	No data
Panama (2011)	4'576	0.21%	10	No data
Papua New Guinea	11'798	1.03%	9'185	No data
Paraguay (2007)	51'190	0.24%	11'401	No data
Peru	197'837	0.92%	47'211	14 (2011)
Philippines	80'974	0.68%	3'008	No data
Poland	661'956	4.28%	25'944	120 (2011)
Portugal (2011)	200'151	5.97%	2'603	21
Republic of Korea	25'467	1.37%	16'733	No data
Réunion (France)	594	1.49%	126	No data
Romania	288'261	2.10%	15'315	80 (2011)
Russian Federation	146'251	0.07%	56	120
Rwanda (2011)	3'705	0.19%	876	No data
Samoa (2011)	33'515	11.80%	743	0.01 (2010)
San Marino	Processing only			
Sao Tome and Principe	4'051	7.23%	2'180	No data
Saudi Arabia	13'569	0.01%	79	No data
Senegal	6'736	0.07%	13'483	No data
Serbia	6'340	0.13%	1'073	40 (2010)
Slovakia (2011)	166'700	8.79%	365	4 (2010)
Singapore	Processing only			
Slovenia	35'101	7.60%	2'682	44
Solomon Islands	1'307	1.56%	384	No data
South Africa	43'170	0.04%	201	No data
Spain	1'593'197	6.40%	30'462	998
Sri Lanka	19'517	0.75%	404	No data
Sudan	54'845	0.04%	223	No data
Swaziland	8	0.001%	1	No data
Sweden	477'685	15.58%	5'601	918
Switzerland	125'961	11.98%	6'173	1'520
Syrian Arab Republic (2010)	19'987	0.14%	2'458	No data
Taiwan (2011)	5'016	0.59%	2'300	No data
Tajikistan	12'659	0.27%	10'486	No data
Thailand	32'577	0.18%	7'189 (2011)	51 (2009)
The former Yugoslav Republic of Macedonia	12'731	1.19%	555	No data
Timor-Leste	24'690	6.58%	72 (2009)	No data
Togo	3'889	0.12%	8'858	No data

Annex: Table: Organic Agricultural Land, Producers, Domestic Sales

Country	Area [ha]	Share of all agr. land	Producers[1]	Retail sales [Mio €]
Tonga	398	1.28%	123	No data
Tunisia	137'188	1.36%	2'302	No data
Turkey	523'627	2.16%	57'259	4 (2009)
Uganda	231'157	1.66%	189'610	No data
Ukraine	272'850	0.66%	164	5 (2011)
United Arab Emirates	3'905	0.69%	34	No data
United Kingdom	590'009	3.43%	4'281	1'950
United Republic of Tanzania	186'537	0.53%	148'610	No data
United States of America (2011)	2'178'471	0.64%	12'880	22'590
Uruguay (2006)	930'965	6.29%	630	No data
Uzbekistan	213	0.001%	1	No data
Vanuatu	4'106	2.20%	696	No data
Venezuela (2009)	59	0.003%	1	No data
Viet Nam	36'285	0.35%	6'829	No data
Zambia (2009)	7'310	0.03%	10'055	No data
Zimbabwe	626	0.004%	3 (2011)	No data
Total	**37'544'909**	**0.86%**	**1'927'018**	**51'100**

Source: FiBL-IFOAM-survey 2014, based on data from governments, the private sector, and certifiers. Market data survey in cooperation with AMI. For detailed data sources see annex, page 286.

Data Providers and Data Sources

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

Afghanistan

Source
Certifier data. Data are from 2011.

Albania

Source
Survey among certifications bodies carried out by the Albanian Association of Marketing.
Contact
Iris Kazazi, Albanian Association of Marketing, Tirana, Albania.

Algeria

Source
Mediterranean Organic Agriculture Network MOAN c/o C.I.H.E.A.M, Bari; Italy; area and operator data are from 2012; export data from 2011.
Contact
Dr. Marie Reine Bteich, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it
Note
No separate figure for the number of producers was available; the figure communicated here is that for all operators in the country.

Angola

Certifier data.

Argentina

Source
Land use/operator/production data: SENASA, 2013 "Situación de la Producción Orgánica en la Argentina durante el año 2012". Buenos Aires. In addition, further data were provided by SENASA, www.senasa.gov.ar
Export data is from 2009; some of the operator data from 2011.
Contact
Juan Carlos Ramirez and Diego Pinasco, SENASA, Buenos Aires, Argentina, www.senasa.gov.ar

Armenia

Source
Survey of Ecoglobe - Organic control and certification body, 375033 Yerevan, Republic of Armenia, www.ecoglobe.am.
Contact
Nune Darbinyan, Ecoglobe - Organic control and certification body, 375033 Yerevan, Republic of Armenia, www.ecoglobe.am.

Australia

Source
- Land area and the number of producers are from 2009 based on figures from the Australian Quarantine and Inspection Service (AQIS)
- Land use and crop data were taken from: Mitchell, A., Kristiansen, P., Bez, N. and Monk, A. (2010), Australian Organic Market Report 2010. Biological Farmers of Australia, Chermside and from Monk, A., Mascitelli, B., Lobo, A., Chen, J. and Bez, N. (2012), Australian Organic Marketing Report 2012, Biological Farmers of Australia, Chermside. Please note that the crop data from the above mentioned study are based on a survey among producers in Australia, and only the data of those who responded to the survey are included. The data may therefore not be complete.
- Domestic market and export value (2012) according to Monk, A., Mascitelli, B., Lobo, A., Chen, J. and Bez, N. (2012), Australian Organic Marketing Report 2012, Biological Farmers of Australia, Chermside.

Contact
- Alexandra Mitchell, School of Rural Science and Agriculture, University of New England, Armidale, NSW Australia

Austria

Sources
- Data source for land area, land use and farms: Lebensministerium: Gruener Bericht. Lebensministerium, Wien, www.gruenerbericht.at and from Eurostat.
- Domestic market data and export data are from 2011 and were compiled by Organic Retailers Association (ORA). Details on individual products are available from RollAMA/AMA-Marketing (2012) Marktentwicklung. Wert und Menge. RollAMA/AMA-Marketing, Vienna.

Contact
- Otto Hofer, Lebensministerium / Federal Ministry of Agriculture, Forestry, Environment and Water Management (AT), Vienna, Austria, www.lebensministerium.at
- Ralph Liebing, ORA ~ Organic Retailers Association, Vienna, Austria, www.o-r-a.org

[1] Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[2] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[3] Bernhard Schlatter, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org

See also country report by Elisabeth Klingbacher in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org/

Azerbaijan

Source

GABA Ganja Agribusiness Association, Ganja, Azerbaijan, www.gaba.az

Contact

Dr. Vugar Babayev; GABA Ganja Agribusiness Association, Ganja, Azerbaijan; www.gaba.az

Bangladesh

Source

Horticulture Export Development Foundation, Dhaka, Bangladesh, www.hortex.org. For the crop some data from an international certifier were included.

Contact

Mitul Saha, Assistant General Manager, Horticulture Export Development Foundation, Dhaka, Bangladesh; www.hortex.org. See also country report about organic farming in Bangladesh in this volume.

Belarus

Source

Certifier data (wild collection only).

Belgium

Source

- Land area and operators: Eurostat The Eurostat homepage, Eurostat, Luxemburg and Service public de Wallonie, DG Agriculture, Ressources naturelles et Environnement
- Market data Vlaams Centrum voor Agro- en Visserijmarketing vzw (VLAM) based on data from GfK, Brussels, Belgium, based on Gfk data

Contact

- Paul Verbeke, BioForum Vlaanderen vzw, Antwerpen, www.bioforum.be
- See also country report by Paul Verbeke in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org/

Belize

Source

- Survey among the certified companies in Belize by the Belize Organic Producers Organisation BOPA, Belmopan, Belize.

Contact

- Maximiliano Ortega, Belize Organic Producers Organisation BOPA, Belmopan, Belize

Benin

Source

- FiBL West Africa and Eco West Africa

Contact

- Laurent C. Glin, Researcher, FiBL West Africa and Wageningen University

See also country report about Benin from Laurent Glin in the 2012 edition of "The World of Organic Agriculture".

Bermuda

Certifier data.

Bhutan

Source

Ministry of Agriculture MOA, National Organic Programme DOA, Thimphu, Bhutan, www.moa.gov.bt.

Contact

Kesang Tshomo, Ministry of Agriculture MOA, National Organic Programme DOA, Thimphu, Bhutan, www.moa.gov.bt.

Note

The data on Bhutan presented in this volume are the revised data for 2011. Data for 2012 were not available for the current survey.

Bolivia

Source

GIZ survey based on the data from Bolicert, BioLatina, Ceres, IMO-Control, Camara de Exportadores de La Paz and Bolivian Association of Organic Producers Organisations – AOPEB. No new data were received for 2012.

Bosnia Herzegovina

Source

- Area and operators (2011 data): Survey by Organska Kontrola, Sarajevo, Bosnia & Herzegovina
- Market data (2010): Ecozept - Dr. Burkhard Schaer, schaer@ecozept.com, www.ecozept.com

Contact

- Mersida Musabegovic, Organska Kontrola, Sarajevo, Bosnia & Herzegovina
- Aleksandra Nikolic, University of Sarajevo, Bosnia & Herzegovina

Brazil

Sources

- Area and operators: COAGRE/DEPROS/SDC/MAPA (2013): Dados da agricultura orgânica oficialmente regulamentada no Brasil. Ministério da Agricultura, Pecuária e Abastecimento. The wild collection data are from 2011.
- Export (2010) and domestic market data (2012): Instituto de Promoção do Desenvolvimento (IPD), provided by Patricia Flores (see article in this book).

Further reading

- Instituto de Promoção do Desenvolvimento (IPD) (2010): Perfil do mercado orgânico

brasileiro como processo de inclusão social. Curitiba Paraná, Brazil. http://ipd.org.br/upload/tiny_mce/arquivos/Perfil_do_mercado_organico_brasileiro_como_processo_de_inclusao_social.pdf)

Contacts

- Angela Pernas Escosteguy, Instituto do Bem-Estar, Porto Alegre, Brazil
- Roberto Matar, Ministério da Agricultura Pecuária e Abastecimento, Brasília, Brazil

Bulgaria

Sources

- Land area, operators: Eurostat, Luxembourg and Ministry of Agriculture, Sofia, Buglaria
- Domestic market data (from 2010): Bioselena, Karlovo, Bulgaria. www.bioselena.com

Contact

Dr. Stoilko Apostolov, FOA Bioselena, Karlovo, Bulgaria. www.bioselena.com

Note

See also article about organic farming in Bulgaria in the 2012 edition of "The World of Organic Agriculture" and country report from Stoilko Apostolov in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Burkina Faso

Sources

- The data were compiled by FiBL based on the data of the following international certifiers.
- BCS, Nürnberg, Germany, www.bcs-oeko.deControl Union, Zwolle, The Netherlands, www.controlunion.org
- CERTISYS, B-1150 Bruxelles, Belgium, www.certisys.eu.
- Ecocert West Africa, Ougadougou, Burkina Faso
- LACON GmbH, Brünnlesweg 19, 77654 Offenburg, Germany, www.lacon-institut.com

Contact

- Gyorgyi Acs Feketene, Control Union, Zwolle, The Netherlands, www.controlunion.org
- Tobias Fischer, BCS, Nürnberg, Germany, www.bcs-oeko.de;Emmeline Foubert, CERTISYS, B-1150 Bruxelles, Belgium, www.certisys.eu.
- Fabienne Verzeletti, LACON GmbH, www.lacon-institut.com
- Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso

Burundi

Source

Ecocert East Africa, Madagascar. The data are from 2011.

Contact

Sandra Randrianarisoa, Ecocert S.A., Villa Arimanantsoa, Madagascar, www.ecocert.com.

Cambodia

Source

Cambodian Organic Agriculture Association (COrAA), Khan Chamkar Morn, Phnom Penh, Cambodia, www.coraa.org. Survey among the organic certifiers in the country

Contact

- Winfried Scheewe, Cambodian Center for Study and Development in Agriculture (CEDAC), Toul Kok Phnom Penh, Cambodia, http://www.cedac.org.kh

Cameroon

Source

The data were compiled by FiBL and IFOAM based on the data of the following international certifiers:

- Ecocert, BP 47, 32600 L'Isle Jourdain, France, www.ecocert.com.
- Soil Association Certification Limited, Bristol, UK, www.soilassociation.org/certification
- Institute for Marketecology (IMO), 8570 Weinfelden, Switzerland, www.imo.ch;

Contact

- Andrew Bayliss, Soil Association Certification Limited, Bristol, UK, www.soilassociation.org/certification
- Inses Hensler, Institute for Marketecology (IMO), 8570 Weinfelden, Switzerland, www.imo.ch;
- Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com.

Canada

Source

Land area, producers and other operator types: Survey of the Canadian Organic Growers (COG), Ottawa, Ontario K1N 7Z2, Canada, www.cog.ca; based on information of the certifiers.
Market data (from 2012): Canada Organic Trade Association (COTA), (2013) Canada's Organic Market, quoted in the article by Holmes and Macey in this volume.

Contact

- Matthew Holmes, Executive Director, Canada Organic Trade Association (COTA), Sackville, Canada, http://ota.com/otacanada.html
- Anne Macey, Canadian Organic Growers (COG), Ottawa, Ontario K1N 7Z2, Canada, www.cog.ca.

Note

See also article about organic farming in Canada in this and in previous editions of "The World of Organic Agriculture".

Chad

Source

Ecocert West Africa, Ougadougou, Burkina Faso
Wild collection only)

Contact

Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso

Channel Islands

Source

FAOSTAT (2011): Resourcestat. Land. Last update: July 21, 2011.
http://faostat.fao.org/site/377/DesktopDefault.aspx?PageID=377#ancor
The data is from 2011

Chile

Source

- Certified areas (2012)and the number of producers/ smallholders (2011): Servicio Agrícola y Ganadero (SAG), Av. Presidente Bulnes 140, Santiago, Chile, www.sag.gob.cl.
- Organic export value: Servicio Nacional de Aduanas, Chile
- Domestic market data according to USDA: Organic Products Report Chile. GAIN Report Number CI0031. November 30, 2010

Contact

Pilar M. Eguillor Recabarren, Oficina de Estudios y Políticas Agrarias (ODEPA), Ministerio de Agricultura, Teatinos 40, Santiago, Chile, www.odepa.gob.cl.

China

Sources

- Land area: From the Certification and Accreditation Administration of the People's Republic of China CNCA an area of 1'602'330 hectares was communicated with land use details. To this figure an estimate of IFOAM China for the area certified by foreign certifiers was added. Crop data: As no new land use and crop data were available, for some crops data from previous surveys were used.
- Market data (from 2008): Panyakul, Vitoon R. and Zejiang Zhou: Overview of the market for organic food products in China PRC. International Trade Centre ITC. Geneva. Available at http://www.intracen.org/uploadedFiles/intracenorg/Content/Publications/Organic-food-products-in-China-market-overview.pdf.

Contact

- Dr. Wang Maohua, Certification and Accreditation Administration of the People's Republic of China CNCA
- Zejiang Zhou, Board of IFOAM Asia, China

Colombia

Source

- ECONEXOS, Conexion Ecologica, Calle 5 No. 45A-125, Cali, Colombia, info@econexos.org, www.econexos.com
- Minagricultura - Ministro de Agricultura y Desarrollo Rural, Avenida Jiménez No. 7-65, Bogotá DC, República de Colombia, www.minagricultura.gov.co.
- *The data is from 2011.*

Contact

- Carlos Escobar, ECONEXOS - Desarrollo en Movimiento, Cali República de Colombia, www.econexos.com.

Comoros

Source

Ecocert, BO 47, 32600 L'Isle Jourdain, France, www.ecocert.com. The data is from 2011.

Contact

Sandra Randrianarisoa, Ecocert S.A., Villa Arimanantsoa, Madagascar, www.ecocert.com.

Congo, Democratic Republic of

Source

Certifier data. The area data is from 2012, the producer data from 2008.

Cook Islands

Source

Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int.

Contact

Karen Mapusua, Secretariat of the Pacific Community (SPC), Private Mail Bag, Suva FIJI, www.spc.int

Costa Rica

Source

- Land area, operators and export data: Servicio Fitosanitario del Estado (2013): Programas Especiales/ Agricultura Orgánica. Estadísticas 2012. M.A.G Costa Rica, San José.
- Export data (2009 data) PROMOCER (2011): Costa Rica: exportaciones de productos orgánicos según destino.
- Domestic market data (2008) were provided by the organic sector organization MAOCO.

Contact

Roberto Azofeifa, Ministerio de Agricultura y Ganadería, 10094-1000 San José, Costa Rica.

Côte d'Ivoire

The data were compiled by FiBL based on the data of the following international certifiers.

Sources

- BCS, Nürnberg, Germany, www.bcs-oeko.de
- Control Union, Zwolle, The Netherlands, www.controlunion.org
- Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com.

Contact
- Gyorgyi Acs Feketene, Control Union, Zwolle, The Netherlands, www.controlunion.org
- Tobias Fischer, BCS, Nürnberg, Germany, www.bcs-oeko.de;
- Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com

Croatia
Sources
- Operators and areas: The data were provided via the Mediterranean Organic Agriculture Network (MOAN), c/o IAM Bari, by the Ministry of Agriculture, Fisheries and Rural Development, Zagreb, Croatia, www.mps.hr.
- Market& trade data: Darko Znaor, Independent Consultant, 10000 Zagreb, Croatia

Contact
- Darko Znaor, Independent Consultant, 10000 Zagreb, Croatia
- Darija Musulin, Ministry of Agriculture, Zagreb, Croatia, http://www.mps.hr
- See also country report by Darko Znaor in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Cuba
Certifier data

Cyprus
Source
Land area and producer data: Eurostat
Market data (from 2006): Ecozept

Czech Republic
Sources
All data were provided by ÚZEI, Prague, Czech Republic. The market and international trade data are from 2011.

Contact
Andrea Hrabalová, ÚZEI, Brno, Czech Republic
- See also country report by Andrea Hrabalová in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Denmark
Sources
- Land area, land use, Operators: Eurostat The Eurostat homepage, Eurostat, Luxemburg.
- Domestic sales: Source: Landbrug & Fødevarer. Based on data from statistics Denmark and Organic Denmark.
- Exports, imports: Statistics Denmark.
- Other marketing channels: Organic Denmark. Data compiled by Danish Agriculture & Food Council, Agro Food Park 15, 8200 Aarhus.

Contact
Ejvind Pedersen, Danish Agriculture & Food Council, Agro Food Park 13, 8200 Aarhus N, Denmark.
See also country report by Tomas Fibiger Norfelt in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Dominica
Source
Division of Agriculture, provided by Dominica Organic Agriculture Movement (DOAM) Inc., PO Box 1953 - Roseau, Commonwealth of Dominica. The data is from 2011.

Contact
Ms. Aikuali Joseph, Dominica Organic Agriculture Movement (DOAM) Inc., Roseau, Commonwealth of Dominica.

Dominican Republic
Source
Secretaria de Estado de Agricultura, Oficina de Control Orgànico, Santa Domingo, Dominican Republic, www.agricultura.gob.do.

Contact
José A. Zapata G., Secretaria de Estado de Agricultura, Oficina de Control Orgànico, Santa Domingo, Dominican Republic, www.agricultura.gob.do.

Ecuador
Source
Land area (2013 data), operators (2011 data) Agrocalidad, Quito Ecuador, www.agrocalidad.gob.ec

Contact
Paulina Betancourt, Agrocalidad, Quito, Ecuador

Egypt
Source
Mediterranean Organic Agriculture Network MOAN, c/o IAMB Bari. The data are from 2010.

Contact
Dr. Marie Reine Bteich, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it.

Note
For Egypt only a figure for the total operators is available for 2009, this figure is listed under "producers".

El Salvador
Source
Ministerio de Agricultura y Ganadería, Final 1a. Avenida Norte, 13 Calle Poniente y Avenida Manuel, Gallardo, Santa Tecla, El Salvador. Data is from 2008.

Estonia
Sources
- Land area, land use, Operators: Agricultural Board, Organic Agriculture Department,

adapted by the Centre of Ecological Engineering.
› Market data (2011) were provided by the Merit Mikk, Centre of Ecological Engineering, Tartu, Estonia

Contact
Merit Mikk, Merit Mikk, Centre of Ecological Engineering, Tartu, Estonia
See also country report by Merit Mikk in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Ethiopia
Source
Ethiopian Association of Organic Agriculture and Tepi National Spice Research Centre; survey among the certifiers. The export data re from 2010.

Contact
Addisu Alemayeh, Ethiopian Association of Organic Agriculture and Tepi National Spice Research Centre, Addis Ababa, Ethiopia

Falkland Islands
Source
Department of Agriculture, Bypass Road, Stanley, Falkland Islands, www.agriculture.gov.fk.
Area data and producer numbers are form 2012; export data from 2009.

Contact
Lucy Ellis, Department of Agriculture, Bypass Road, Stanley, Falkland Islands, www.agriculture.gov.fk

Faroe Islands
Source
Vottunarstofan Tún ehf., Laugavegur 7, 101 Reykjavík, Iceland, www.tun.is.

Contact
Gunnar Gunnarsson, Vottunarstofan Tún ehf., Reykjavík, Iceland, www.tun.is.

Fiji Islands
Sources
Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int. To this data, data from one international certifier were added.

Contact
Data provided by Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom).

Finland
Sources
› Land area, land use and operators: Evira and Eurostat
› Data on wild collection provided by the Finnish Food Safety Authority Evira
› Market and international trade data: Pro Luomu, Kauniainen, Finland

Contact
› Sampsa Heinonen, Evira, Helsinki, Finland
› Marja-Riitta Kottila, Pro Luomu, Kauniainen, Finland

See also country report by Sampsa Heinonen in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

France
Source
All data: Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

Contact
› Nathalie Rison, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr
› See also country report by Elisabeth Mercier in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

French Guyana
Source
Agence BIO: The Agence Bio website, Agence Bio, 93100 Montreuil sous Bois, France. Available at http://www.agencebio.org/pageEdito.asp?IDPAGE=196&n1=6

Contact
Nathalie Rison, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

French Polynesia
Sources
Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int. To this data, data from 2 international certifiers were added.

Contact
Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom)

Gambia
Data for Gambia have not been supplied since 2007 by any of the certification bodies. IFOAM and FiBL therefore concluded that there is currently no certified organic production in the country. Any information on certified organic farming in Gambia should be sent to the IFOAM Africa coordinator, Hervé Bouagnimbeck, IFOAM, Bonn Germany, e-mail h.bouagnimbeck@ifoam.org.

Georgia
Source
Elkana Survey, Elkana, 16 Gazapkhuli street, 0177 Tbilisi, Georgia, www.elkana.org.ge. The data is from 2011.

Contact
Elene Shatberashvili, Biological Farming Association Elkana, 16 Gazapkhuli street, 0177 Tbilisi, Georgia, www.elkana.org.ge

Germany
Sources
› Total organic land area and operators: Ministry of Food, Agriculture and Consumer Protection BMELV, Bonn, Germany ; press release of May 29, 2012 : Ökolandbau-

Fläche in Deutschland steigt auf über 1 Million Hektar; http://www.bmelv.de
- Land use and production details: Agrarmarkt Informations-Gesellschaft mbH AMI, Bonn, Germany, www.ami-informiert.de/
- Market data: Agrarmarkt Informations-Gesellschaft mbH (AM), Bonn, Germany, www.ami-informiert.de;

Contact
- Diana Schaack, AMI, Bonn, Germany, www.ami-informiert.de/

See also country report by Diana Schaack and Helga Willer in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Ghana
Source
The data were compiled by FiBL and IFOAM based on the data of the following international certifiers.
- BCS, Nürnberg, Germany, www.bcs-oeko.de;
- CERTISYS, Brussels, www.certisys.eu
- Control Union, Zwolle, The Netherlands, www.controlunion.org
- Ecocert West Africa, Ougadougou, Burkina Faso
- IMO, Weinfelden, Switzerland, www.imo.ch

Contact
- Gyorgyi Acs Feketene, Control Union, Zwolle, The Netherlands
- Tobias Fischer, BCS, Nürnberg, Germany, www.bcs-oeko.de
- Emmeline Foubert, CERTISYS, Brussels, Belgium
- Ines Hensler, IMO, Weinfelden, Switzerland
- Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com

Note
A direct year-to-year comparison over the past ten years is not possible, because data from more certifiers were available than previously. From 2009 to 2012, the sources have remained the same.

Greece
Sources
- Land area and operators: Eurostat
- Market data (from 2010) were provided by Nicoletta von der Smissen, Feres, Greece

Contact
- Nicoletta von der Smissen, Feres, Greece

See also country report by Nivoletta van der Smissen in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Grenada
Data from one international certifier (data from 2010).

Guadeloupe
Source
Agence BIO: The Agence Bio homepage 93100 Montreuil sous Bois, France. Available at http://www.agencebio.org/pageEdito.asp?IDPAGE=196&n1=6

Contact
Nathalie Rison, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

Guatemala
Source
Department of Organic Agriculture, Ministerio de Agricultura, Ganaderia y Alimentación (MAGA), Ciudad de Guatemala, Guatemala C.A. 01013, http://www2.maga.gob.gt. The data is from 2011.

Contact
Loli Edeso, RUTA, San Jose, Costa Rica

Guinea Bissau
Data on shea nuts (production only) were provided by one international certifier (data from 2011).

Guyana
Source
Ecocert, BO 47, 32600 L'Isle Jourdain, France, www.ecocert.com. The data are from 2009.

Haiti
Data were received from two international certifiers; only one provided new data for 2012.

Honduras
Source
Agricultura Orgánica Honduras, Secretaria de Agricultura y Ganadería, Tegucigalpa, Honduras, SENASA Honduras

Contact
Ing. Sandra Elvir, Jefe del Departamento de Agricultura Organica, Honduras

Hungary
Sources
- Land area and operators: Eurostat. Additional data were received from Biokontroll Hungária, Budapest, Hungary
- Market and trade data (from 2009): Survey of Biokorsar, Budapest, Hungary

Contact
- Dora Drexler, ÖMKI, Budapest, Hungary, www.biokutats.hu
- Ferenc Frühwald, Biokorsar, Budapest, Hungary
- Adrienn Sárközy, Biokontroll Hungária, 1027 Budapest, Hungary, www.biokontroll.hu

See also country report by Zoltán Dezsény and Dora Drexler in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Iceland

Source

Vottunarstofan Tún ehf., Laugavegur 7, 101 Reykjavík, Iceland, www.tun.is.

Contact

Gunnar Gunnarsson, Vottunarstofan Tún ehf., Laugavegur 7, 101 Reykjavík, Iceland, www.tun.is. See also country report by Gunnar Gunnarsson in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

India

Source

- Land area, operators, exports: Agricultural and Processed Food Products Export Development (APEDA) Ministry of Commerce & Industry, Govt of India, New Delhi - 110 016, India, www.apeda.com.
- Market data were provided by Manoj Kumar Menon of the International Competence Centre of Organic Agriculture ICCOA, Bangalore

Contact

Dr. P.V.S.M. Gouri, Agricultural and Processed Food Products Export Development (APEDA), New Delhi, India, www.apeda.com

Indonesia

Source

Indonesian Organic Alliance, Bangor, Indonesia (www.organicindonesia.org). Survey among the certifiers active in the country.

Contact

Lidya Ariesusanty, Indonesia Organic Alliance, Indonesia, www.organicindonesia.org

Iran

Source

Environmental Sciences Research Institute, Shahid Beheshti University ESRI, Evin, Tehran, Iran. The information is based on the data of the certifiers active in the country

Contact

Hossein Mahmoudi, Environmental Sciences Research Institute, Shahid Beheshti University ESRI

Ireland

Source

- Area, operators and livestock data: Department of Agriculture Fisheries and Food, Dublin, Ireland. The data are from 2011.
- Market data: Bord Bia, Dublin, Ireland, based on Data of Kantar

Contact

- Philipp Cullen, Department of Agriculture Fisheries and Food, Johnstown Castle Estate, Co. Wexford, Ireland www.agriculture.gov.ie.
- Lorcan Burke and Rosaleen O'Shaughnessy, Bord Bia, Dublin, Ireland
- See also country report by Marta Romeo and Marie Reine Bteich in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Israel

Source

Source for all data: Standardization and Accreditation Department Ministry of Agriculture and Rural Development Plant Protection and Inspection Services (PPIS), Israel, www.ppiseng.moag.gov.il/ppiseng/ISRAEL. .The data are published in the "Annual Report: Export of Fresh and Processed products to the European Union"

Contact

Mirit Amrani, Head Standardization and Accreditation Department, Ministry of Agriculture and Rural Development, Plant Protection and Inspection Services (PPIS), Israel

Note

The data cover only the products exported to the European Union.

Italy

Sources

- Operator, primary crops, livestock products, imports: SINAB Italian Information System on Organic Farming, Rome, Italy
- Domestic market (totals), ASSOBIO, 35121 Padova, Italy
- Domestic market (details), ISMEA, Research institute for agriculture and market studies, Roma, Italy

Contact

- Roberto Pinton, ASSOBIO, 35121 Padova, Italy
- Enrico De Ruvo, ISMEA, Research institute for agriculture and market studies, Roma, Italy
- Marta Romeo, SINAB Italian Information System on Organic Farming, Rome, Italy
- See also country report by Marta Romeo and Marie Reine Bteich in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Jamaica

Source

Jamaica Organic Movement JOAM, P.O. Box 5728, Kingston 6, Jamaica, www.joamltd.org. The data are from 2009.

Contact

Trevor Brown, Jamaica Organic Movement JOAM, www.joamltd.org

Japan

Source

Primary production, producer, export and import data: Ministry of Agriculture, Forestry and Fisheries (MAFF), Tokyo 100 - 8950, Japan,

www.maff.go.jp/e/index.html. The area and producer data are from 2010
Domestic market data: Heinz Kuhlmann, ABC Enterprises, Tokio, Japan

Contact
Heinz Kuhlmann, ABC Enterprises, Tokio, Japan

Jordan

Source
Mediterranean Organic Agriculture Network (MOAN), maintained by IAM Bari

Contact
- Dr. Lina Al Bitar and Dr. Marie Reine Bteich, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it
- Mohammad Al Oun, Jordan National Centre for Research and Development, Jordan

Kazakhstan

Source
The data were compiled by the Organic Centre of Kazakhstan (www.organiccenter.kz); a survey among the certifiers was carried out.

Contact
Evgeniy Klimov, Director of the Organic Centre of Kazakhstan and director of the Foundation for Integration of Ecological Culture, 40, Almaty, Kazakhstan, www.organiccenter.kz

Kenya

Source
Kenya Organic Movement (KOAN), Nairobi, Kenya, www.koan.co.ke. The data are collected among the organic operators in the country and cover most of the country's organic land/producers.

Contact
Jack Juma, Kenya Organic Movement (KOAN), Nairobi, Kenya, www.koan.co.ke.

Korea, Republic of

Source
National Agricultural Products Quality Management Service, Korea (for area, production, imports) and Korea Rural Economic Institute (2013) for market volume.

Contact
Jennifer Chang, Korean Federation of Organic Agriculture Organisations (KFSA), Republic of Korea

Kosovo

Source
Initiative for agricultural development of Kosovo (IADK), Mitrovica, Republic of Kosov

Contact
Basri Hyseni, Initiative for agricultural development of Kosovo (IADK), Mitrovica, Republic of Kosovo

Kyrgyzstan

Source
Helevtas, BioCotton Project, Jalalabat, Kyrgyzstan

Contact
Gulzaada Aleshova, Helevtas, Jalalabad, Kyrgyz Republic

Latvia

Sources
- Land area and operators: Eurostat. The Eurostat homepage, Eurostat, Luxemburg
- Market data: Ekoconnect, Dresden, Germany and AMI, Bonn, Germany
- See also country report by Gustavs Norkarklis in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Lao People's Democratic Republic

Source
- Data for organic agricultural area and some corps according to Panyakul, Vitoon (2012): Lao's Organic Agriculture: 2012 Update. Earth Net Foundation / Green Net/UNCTAD, Geneva. Download: http://unctad.org/en/Docs/Lao%20Organic%20Agriculture%202012%20Update.pdf
- Furthermore crop data (from 2009) of the Department of Agriculture (DOA), PO BOX 811, Vientiane, Laos with additions from, Helvetas Laos/PROFIL Project - Promotion of Organic Farming and Marketing in Lao PDR, Vientiane Capital, Lao PDR, www.laosorganic.com.

Contact
- Thavisith Bounyasouk, Department of Agriculture (DOA), PO BOX 811, Vientiane, Laos
- Agung Nugroho, Helvetas Laos – PROFIL Project - Promotion of Organic Farming and Marketing in Lao PDR, PO Box 6367, Phonesavanh Neua Village, Sisattanak District, Vientiane Capital, Lao PDR, www.laosorganic.com.

Lebanon

Source
Mediterranean Organic Agriculture Network (MOAN), maintained by IAM Bari. The data are from 2011.

Contact
- Dr. Lina Al Bitar and Dr. Marie Reine Bteich, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it

Lesotho

Certifier data

Liechtenstein

Source

Klaus Büchel Anstalt, Institute of Agriculture and Environment, 9493 Mauren, Liechtenstein, www.kba.li.

Contact

Data were provided by: Klaus Büchel, Institute of Agriculture and Environment, 9493 Mauren, Liechtenstein, www.kba.li.
See also country report by Klaus Büchel in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Lithuania

- Land area, production volume, operators::Eurostat, the Eurostat Website
- Market data: Ekoconnect, Dresden, Germany and AMI, Bonn, Germany
- See also country report by Virgilijus Skulskis in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Luxembourg

Source

- Land area (2012) and operator data (2010): Administration des Services Techniques de l'Agriculture ASTA, Luxembourg. Land use data are from 2009
- Market data : Biogros Estimate, 13 Parc d'Activité Syrdall, L-5365 Munsbach, www.biogros.lu/de/home/

Contact

- Raymond Aendekerk, bio-LABEL – Sekretär, 13, rue Gabriel Lippmann, Parc d'activité Syrdall, L-5365 Munsbach, www.biolabel.lu
- Monique Faber, Administration des Services Techniques de l'Agriculture (ASTA), 1019 Luxembourg, www.asta.etat.lu.
- Aender Schanck, Biogros, 13 Parc d'Activité Syrdall, L-5365 Munsbach, www.biogros.lu/de/home/
- See also country report by Raymond Aendekerk in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Macedonia, The Former Yugoslav Republic

Source

Ministry of Agriculture, Forestry and Water economy, Skopje, provided by Mediterranean Organic Agriculture Network (MOAN)

Contact

- Olivera Bicikliski, Ministry of Agriculture, Forestry and Water Management, Skopje, Former Yugoslav Republic of Macedonia
- Marie Reine Bteich, Mediterranean Organic Agriculture Network (MOAN), c/o IAM Bari, Italy
- Gordana Pecelj, PROBIO, Skopje, Macedonia, www.probio.com.mk

Madagascar

Sources

- Australian Certified Organic ACO, Chermside, Australia, www.aco.net.au (2009 data)
- Ecocert S.A., Villa Arimanantsoa, Madagascar, www.ecocert.com (2011 data)
- LACON GmbH, Brünnlesweg 19, 77654 Offenburg, Germany, www.lacon-institut.com

Contact

- Sandra Randrianarisoa, Ecocert S.A., Villa Arimanantsoa, Madagascar, www.ecocert.com
- Akiko Nicholls, Australian Certified Organic ACO, Chermside, Australia
- Fabienne Verzeletti, LACON GmbH, www.lacon-institut.com

Malawi

Source

The data were collected among several international certifiers, not all of who provided new data for 2011.
Area data and operators data: Malawi Organic Association

Contact

Stanley Chidaya, Malawi Organic Association, Lilongwe, Malawi.

Malaysia

Source

Department of Agriculture (2013 data)

Contact

Data provided by Ong Kung Wai, Organic Malaysia, Malaysia

Mali

Sources

The data were compiled by FiBL and IFOAM, based on the data of the following international certifiers.

- CERTISYS, Walhain, Belgium, www.certisys.be
- Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com

Contact

- Emmeline Foubert, CERTISYS, Walhain, Belgium, www.certisys.be
- Data provided by Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com

Malta

Source

- Land area and operators: Eurostat: the Eurostat homepage, Eurostat, Luxemburg

Contact

Dennis Sciberras, Senior Agricultural Officer, Organic Section, Agriculture Directorate, Department for Rural Affairs and Aquaculture,

Agriculture Research and Development Centre, Ghammieri

Martinique (France)

Source

Agence BIO: The Agence Bio, Montreuil sous Bois, France

Contact

Nathalie Rison, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

Mauritius

The data were provided by two international certifiers.

Mexico

Source

Universidad Autónoma Chapingo, own data (based on data of the certifiers).

Contact

Rita Schwentesius, Universidad Autónoma Chapingo, Carretera México - Texcoco Km. 38.5. Chapingo, Estado de México

Moldova

Source

Moldovan Investment and Export Promotion Organisation report on organic farming "Organic Agriculture in Moldova: Local and Regional Perspectives". October-November 2012.

Mongolia

No data were received from Mongolia.

Montenegro

Source

- Area data: Monteorganica, Podgorica, Montenegro.
- Operator data (from 2010): Ministry of Agriculture, Forestry and Water Management, Podgorica, Montenegro.
- Market data (from 2010): Ecozept - Market research and marketing consulting agency. Freising, Germany

Contact

Prof. Dr Natasa Mirecki, Biotechnical Faculty, University of Montenegro, Mihaila Lalica, 81000 Podgorica, Montenegro, http://www.btf.ac.me/en/
See also country report by Natasa Mirecki in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Morocco

Source

Ministère de l'Agriculture et de la Pêche Maritime, Rabat, Morocco, http://www.agriculture.gov.ma and Mediterranean Organic Agriculture Network MOAN, C.I.H.E.A.M., c/o Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it.

Contact

Allal Chibane, Ministère de l'Agriculture et de la Pêche Maritime, Rabat, Morocco, http://www.agriculture.gov.ma;
Dr. Lina Al Bitar and Dr. Marie Reine Bteich, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it.

Note on producer data

No separate figure for the number of producers was available, the figure communicated is that for all operators in the country (2010 data).

Mozambique

Sources

Data were provided by two international certifiers.

Myanmar

Source

Myanmar Organic Agriculture Group, Yangon, Myanmar. To the data of the Myanmar Organic Agriculture Group, the data of one international certifier were added.

Contact

San Linn, Myanmar Organic Agriculture Group, Yangon, Myanmar

Namibia

Source

To the data provided by the Namibian Organic Association, PO Box 1504, Okahandja, Namibia (2011 data), the figures from one international certifier were added (2012). PGS figures are included.

Contact

Manjo Smith, Namibian Organic Association (NOA), PO Box 1504, Okahandja,

Nepal

Source

The data were provided by Maheswar Ghimire, Kathmandu, Nepal. To these data, the data of one international certifier were added (2011 data).

Contact

Maheswar Ghimire, Kathmandu, Nepal

Netherlands

Sources

- Land use details/crops/operators: Eurostat, the Eurostat homepage, Eurostat, Luxemburg
- Market data: Bionext (2013) Monitor Duurzaam Voedsel 2012. Bionext, Zeist; the Bionext website, avaiable at http://www.bionext.nl/files/bio-monitor_2012_uit_monitor_duurzaam_voedsel.pdf
- International trade data: Bionext, Zeist

Contact

- Marian Blom, Biologica, Utrecht, The Netherlands

› See also country report by Marian Blom in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

New Zealand

Source
The AgriBusiness Group, Christchurch, New Zealand, www.agribusinessgroup.com

Contact
Jon Manhire, The AgriBusiness Group, Christchurch, New Zealand, www.agribusinessgroup.com

Nicaragua

The data are from 2009.

Source
Ministerio Agropecuario y Forestal MAGFOR, Managua. Nicaragua, www.magfor.gob.ni,

Contact
Mauricio Carcache Vega, MAGFOR, Manuagua, Nicaragua

Niger

Data source: Certifier data.

Nigeria

Source
The data were compiled by FiBL and IFOAM based on the data of two international certifiers. From one of the certifiers the number of producers is from 2008, no newer figures were available.
In addition, some area data were provided by the University of Ibadan, Ibadan, Nigeria

Contact
Olugbenga O. AdeOluwa, University of Ibadan, Nigeria

Niue

Source
Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int;

Contact
Data provided by Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Norway

Sources
Norwegian Agricultural Authority SLF, Oslo, Norway

Contact
Elin Rosnes and Trine Thanh Ha, Statens landbruksforvaltning (SLF), Oslo, Norway
See also country report by Gerald Altena in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Oman

Source
Kassel University, Witzenhausen, Germany, www.uni-kassel.de/agrar/?language=en.

Contact
Prof. Dr. Andreas Bürkert, Kassel University, Witzenhausen, Germany, www.uni-kassel.de/agrar/?language=en.

Pakistan

Data were provided by one international certifier. The number of producers provided in the tables is in fact the number of clients, to each of which a number of producers might be associated.

Palestine, Occupied Territories

Source
Mediterranean Organic Agriculture Network MOAN, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it. The data are from 2010.

Contact
Dr. Lina Al Bitar and Dr. Marie Reine Bteich, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it.

Note
There was no separate figure for the number of producers, the number presented here refers to all organic operators in the country.

Panama

Source
Ministerio de Desarrollo Agropecuario, Dirección Nacional de Sanidad Vegetal, Panama. The data are from 2011.

Contact
Loli Edeso, RUTA, San José, Costa Rica

Papua New Guinea

Source
Source: Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int. To this data, recent data from one international certifier was added.

Contact
Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Paraguay

Source
MAG/ALTERVIDA/IICA (March 2008): Estrategia Nacional para la Promoción de la Producción Orgánica. Provided by Genaro Coronel, SENVE; Paraguay, Available at www.mag.gov.py/ESTRATEGIA%20NACIONAL.pdf.
The data is from 2007.

Peru

Source
› Area and number of producers: SENASA. Producción Orgánica. Lima, Perú
› Market and Trade data: PromPeru, San Isidro - Lima 27 Perú, www.promperu.gob.pe. The total value of domestic market is an estimate, based the data from Promperu that the domestic

market is between 13.1 and 23.2 million US dollars (2010).

Contact

Dr. Jorge Leonardo Jave Nakayo, Director de Producción Orgánica, Ministerio de Agricultura, SENASA, Peru

Philippines

Sources

The data were compiled by FiBL from a number of certifiers, but there are more certifiers active than those listed below. A direct year-to-year comparison over the years is not possible.
Certifiers who provided data

- BCS, Nürnberg, Germany, www.bcs-oeko.de;
- Ceres, Happburg, Germany (2010 data), www.ceres-cert.com;
- Control Union, Zwolle, The Netherlands, www.controlunion.org;
- Ecocert, L'Isle Jourdain, France, www.ecocert.com;
- Naturland, Gräfelfing (2010 data), Germany, www.naturland.de;
- Organic Certification Center of the Philippines OCCP (2009 data), Barangay Laging Handa, Quezon City, Philippines, www.occpphils.org.

Contact

- Gyorgyi Acs Feketene, Control Union, Zwolle, The Netherlands, www.controlunion.org;
- Tobias Fischer, BCS, Nürnberg, Germany, www.bcs-oeko.de;
- Simone Groh, Ceres, Happburg, Germany, www.ceres-cert.com;
- Lani Katimbang-Limpin, OCCP, Quezon City, Philippines, www.occpphils.org
- Camille Godard, Area Manager, Ecocert, L'Isle Jourdain, France, www.ecocert.com;
- Manfred Fürst, Naturland, Gräfelfing, Germany, www.naturland.de.

Note

Not all certifiers provided data on the number of producers, which therefore must be higher than communicated here. Not all certifiers provided data for 2011.

Poland

Source

- Land area and land use, livestock and production: Eurostat, the Eurostat Website
- Market data: Andrzej Szeremeta, based on national data sources
- See also country report by Dorota Metera in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Portugal

Source

- Land use and operators (2011): Ministério da Agricultura, do Desenvolvimento Rural e das Pescas
- Market data: INTERBIO (2011), http://www.interbio.pt

Contact

Caterina Cristosomo, Portugal/University of Milan, Italy
See also country report by Catarina Crisostomo in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Réunion

Source

Agence BIO, Montreuil sous Bois, France.

Contact

Nathalie Rison, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

Romania

Sources

- Organic area; land use, livestock and production: Eurostat, the Eurostat Website
- Wild collection: Ministry of Agriculture MADR, Bucharest, Romania, see http://www.madr.ro/ro/agricultura-ecologica/dinamica-operatorilor-si-a-suprafetelor-in-agricultura-ecologica.html.
- Market data (from 2011): BCG-Global Advisors (2013) Romanian Organic Sector – Business Insight Booklet. Global Advisors, Bio-Romania Association, The University of Bucharest. Bucharest 2012

Contact

- Iulia Grosulescu, Counsellor Organic Farming Office, Ministry of Agriculture and Rural Development, 24,Blvd Carol I, Bucharest Romania
- Marian Cioceanu, Asociatia Bio Romania, Str.Mihai Eminescu, Bucureşti, Romania, http://www.bio-romania.org/contact/
- See also country report by Boldiszar Megyesi in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Russia

Source

Survey among the certifiers active in the country, carried out by Eco-control Ltd., 141506 Solnechnogorsk, Russia, www.eco-control.ru

Contact

Dr. Andrey Khodus, Eco-control Ltd., 141506 Solnechnogorsk, Russia, www.eco-control.ru

Rwanda

Source

Ecocert S.A., Villa Arimanantsoa, Madagascar., www.ecocert.com. The data are from 2011.

Contact
Sandra Randrianarisoa, Ecocert S.A., Villa Arimanantsoa, Madagascar., www.ecocert.com.

Samoa
Source
Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int
Contact
Data provided by Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

San Marino
Certifier data

Sao Tome and Prince
Source
Ecocert West Africa, Ougadougou, Burkina Faso
Contact
Data provided by Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com

Saudi Arabia
Source
GIZ Organic Farming Project, Riyadh, Saudi Arabia
Contact
Felix Ruhland, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ), Riyadh, Saudi Arabia, www.giz.de

Senegal
Source
To the data provided by the National Federation for Organic Agriculture, AGRECOL BP. 347 Thiès, Sénégal, data from international certifiers were added.
Contact
Famara Diedhioe, National Federation for Organic Agriculture, AGRECOL, BP. 347 Thiès, Sénégal

Serbia
Source
Ministry of Agriculture, Forestry and Water, Belgrade, Republic of Serbia
Contact
- Jelena Milic, Ministry of Agriculture, Forestry and Water, Belgrade, Republic of Serbia
- Marie Reine Bteich, Mediterranean Agronomic Institute of Bari (IAMB), Valenzano, Italy
- Marija Kalentic German International Cooperation GIZ. Novi Sad, Serbia

Note
The data published here include the data from those certifiers that are registered with the Ministry of Agriculture, Forestry and Water. A direct year-to-year comparison with the data provided for 2009 and 2010 by GiZ is therefore not possible. For more information about Serbia see also country report by Jelena Milic in published in: IFOAM EU 2014: Organic in Europe; and "Organic Agriculture in Serbia At a Glance 2014" by the National Association Serbia Organica, available at http://www.serbiaorganica.info/wp-content/uploads/2014/01/KatalogENG72px.pdf

Sierra Leone
Data had been available previously from one international certifier, but the projects are not involved in organic farming any longer.

Singapore
Two international certifiers reported a number of processors.

Slovakia
Sources
Area/operators/livestock/crop production: Eurostat, the Eurostat Website.
Market data (2010): Ecozept, market research and marketing consulting agency. Freising, Germany.

Slovenia
Sources
Area, operators, livestock, crop production,: Eurostat, the Eurostat Website
Market data: Institute for Sustainable Development, Ljubljana, Slovenia
Contact
Anamarija Slabe, Institute for Sustainable Development, Ljubljana
See also country report by Anamarija Slabe in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Solomon Islands
Source
Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int
Contact
Data provided by Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Somalia
No data were reported for Somalia.

South Africa
Source
The data were compiled by FiBL and IFOAM based on the data of the following international certifiers.
- BCS, Nürnberg, Germany
- Control Union, Zwolle, The Netherlands, www.controlunion.org
- Ecocert Southern Africa, Gardens Cape Town, www.ecocert.com (data 2010)
- IMO, Weinfelden, Switzerland, www.imo.ch

Contact
- Gyorgyi Acs Feketene, Control Union, Zwolle, The Netherland
- Tobias Fischer, BCS, Nürnberg, Source, BCS
- Ines Hensler, IMO, Weinfelden, Switzerland
- Clifyn Mckenzie, Ecocert Southern Africa, Gardens Cape Town
- Fabienne Verzeletti, LACON GmbH, www.lacon-institut.com
- Raymond Auerbach, Nelson Mandela Motropolitan University, George, South Africa
- Diana Callear, Afrisco, Lynnwood Ridge, South Africa, www.afrisco.net

Spain
Sources
- Area and land use: Eurostat, the Eurostat website
- Operators: Ministerio de Agricultura, Alimentación y Medio Ambiente (2013): Agriculutra Ecologica: Estatisticas 2012. MAGRAMA, Madrid
- Market and international trade data: Ministerio de Agricultura, Alimentación y Medio Ambiente (2013): Caracterizacction del sector de la produccion ecologica. MAGRAMA, Madrid 2013 http://www.magrama.gob.es/imagenes/es/Informe%20P%20y%20M%20Ecologico%20-%202012-WEB%201-_tcm7-310968.pdf

Contact
- Gonzálvez Pérez, Victor, Spanish Society of Organic Agriculture SEAE, Catarroja (Valencia), Spain, www.agroecologia.net
- Joan Picazos, Biocop Productos Biológicos, S.A. (BIOCOP), Puigmal, 3 08185 Lliçà de vall (Barcelona), Spain, www.biocop.es
- See also country report by Victor Gonzálvez in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Sri Lanka
The data were compiled by FiBL from two international certifiers. Only one of the certifiers provided data on the number of producers, whereas the other only provided the number of operators. The number of producers must therefore be higher than communicated in this book.

Sudan (former)
Sources
Federal Ministry of Agriculture & Irrigation Export Development& Quality Control Unit, Republic of the Sudan. To these the data of three international certifiers were added.

Contact
Afaf Abdelrahim Elgzouly, Federal Ministry of Agriculture & Irrigation Export Development& Quality Control Unit, Sudan

Suriname
The certifier who had provided data previously, did not report any activities anymore.

Swaziland
Data source: Certifier data.

Sweden
Sources
Land area/land use/livestock: Eurostat, the Eurostat Website
Market data: Source: Central Statistical Office SCB, Stockholm, Sweden

Contact
- Carla Larsson, Statistics Sweden, Örebro., Sweden
- Katerina Wolf, KRAV, Uppsala, Sweden
- See also country report by Joahn Ceije, in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Switzerland
Sources
Land area, land use data and producer data compiled by FiBL; based on the data of the certifiers.
Market data: Bio Suisse, Basel, Switzerland, www.biosuisse.ch/de/bioinzahlen.php.

Contact
Helga Willer, FiBL, Frick, Switzerland
See also country report by Helga Willer in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Syria
Source
Mediterranean Organic Agriculture Network MOAN c/o C.I.H.E.A.M; Bari; Italy.

Contact
Dr. Marie Reine Bteich, C.I.H.E.A.M. - Istituto Agronomico Mediterraneo di Bari, Italy, www.iamb.it

Notes
No separate figure for the number of producers was available, the figure communicated is that for all operators in the country. The latest data are from 2010.

Taiwan
Source
Taiwan Organic Agriculture Information Centre. Statistics 1996-2011 at http://info.organic.org.tw/supergood/front/bin/ptlist.phtml?Category=104854, Original Source: Agricultural and Food Agency, Council of Agriculture, Taiwan. The data are from 2011.

Tajikistan

Source

SAS - SUGDAGROSERV, 2 Baraka Boboeva, Khujand 735700, Tajikistan. (Data 2010). To these data, the data of one international certifier were added (2012).

Contact

Javohir Eshmatov, SAS - SUGDAGROSERV, 2 Baraka Boboeva, Khujand 735700, Tajikistan.

Tanzania

Source

Tanzania Organic Agriculture Movement (TOAM), PO Box 70089, Dar es Salaam, Tanzania, www.kilimohai.net. Survey among the organic operators in the country.

Contact

Noel C. Kwai, Tanzania Organic Agriculture Movement (TOAM), PO Box 70089, Dar es Salaam, Tanzania, www.kilimohai.net.

Thailand

Source

Green Net Survey among the international and domestic certifiers; Green Net, 10330 Bangkok, Thailand

Contact

Data provided by Vitoon Panyakul, Green Net, 10330 Bangkok, Thailand, www.greennet.or.th.

Timor-Leste

The data are based on the information of one international certifier.

Togo

Sources

The data were compiled by FiBL based on the data of the following international certifiers.

- Ecocert, Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com
- IMO, Weinfelden, Switzerland, www.imo.ch
- LACON GmbH, Brünnlesweg 19, 77654 Offenburg, Germany

Contact

- Ines Hensler, IMO, Weinfelden, Switzerland
- Aziz Yanogo, Ecocert West Africa, Ougadougou, Burkina Faso
- Fabienne Verzeletti, LACON GmbH, Offenburg, Germany

Tonga

Sources

- Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Contact

- Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Tunisia

Source

Source: Direction Générale de L'Agriculture Biologique (DGAB), Tunis, Tunisia

Contact

- Samia Maamer Belkhiria and Khaoula Baghdadi, Direction Générale de L'Agriculture Biologique (DGAB), Ministry of Agriculture and Hydraulic Resources, Tunis, Tunisia
- Prof. Dr. Mohamed Ben Kheder, B.P 54, Chatt Meriem, Sousse, Tunesia

Turkey

Source

- Ministry of Food, Agriculture and Livestock (MoFAL), Ankara, Turkey
- Market data (2010): Estimate by Erdal Süngü, MoFAL, Ankara, Turkey

Contact

- Erdal Süngü, Ministry of Food, Agriculture and Livestock (MoFAL), Ankara, Turkey, www.tarim.gov.tr.

Note

Some areas contain crops, that can be harvested from the same parcel. Therefore the total of the land use detail data exceeds the actual area surface cultivated for organic farming. A correction value was used in order to calculate the correct total.

Data on the organic domestic market value are roughly estimated (2010 data).

- See also country report by Susanne Padel in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Uganda

Source

National Organic Agricultural Movement of Uganda (NOGAMU), PO Box 70071, Clock Tower, Kampala, Uganda, www.nogamu.org.ug. Data source: Survey among organic operators in the country.

Contact

Charity Namuwoza, National Organic Agricultural Movement of Uganda (NOGAMU), PO Box 70071, Clock Tower, Kampala, Uganda, www.nogamu.org.ug

Ukraine

Source

Survey among the organic operators and certifiers in the country, carried out by the Organic Federation of Ukraine (OFU), Kiev, Ukraine www.organic.com.ua.

Contact

Eugene Milovanov, Organic Federation of Ukraine, Kiev, Ukraine www.organic.com.ua.

United Arab Emirates

Source

Ministry of Environment and Water (MOEW), United Arab Emirates

Contact

- Eng. Saif Mohamed Alshara, Ministry of Environment and Water, United Arab Emirates
- Mohammad Al-Oun (PhD). Director, Water and Food Research Food Programme, Jordan National Centre for Research and Development

United Kingdom

Sources

- Land use details/crops/operators: Defra and National Statistics:
- Market data: Soil Association 2013: Organic Market Report 2012. Bristol, United Kingdom

Contacts

- Dr. Catherine Gerrard and Dr. Susanne Padel, The Organic Research Centre Elm Farm, Newbury, UK, www.organicresearchcentre.com
- See also country report by Susanne Padel in: IFOAM EU (2014): Organic in Europe. Brussels, http://www.ifoam-eu.org

Uruguay

Source

Ministerio de Ganadería, Agricultura y Pesca (MGAP), Montevideo, Uruguay, www.mgap.gub.uy. The data are from 2006

Contact

Betty Mandl, Ministerio de Ganadería, Agricultura y Pesca (MGAP), Montevideo, Uruguay, www.mgap.gub.uy.

United States of America

Sources

Land area and producers (from 2011): United States Department of Agriculture, Washington, USA, http://www.ers.usda.gov/data-products/organic-production.aspx#.UsV8fMpczGA.
Market data: Organic Trade Association 2013: Organic Industry Survey, Brattleboro VT 05301, USA, www.ota.com

Contacts

- Catherine Greene, United States Department of Agriculture, Washington, USA, www.ers.usda.gov/briefing/organic/.
- Barbara Haumann, OTA, Brattleboro VT 05301, www.ota.com

Uzbekistan

Source

Certifier data, compiled by FiBL.

Vanuatu

Source

Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Contact

Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Venezuela

Note

The data were collected among two international certifiers. As the source has changed over the years, a direct-year-to-year comparison is not possible.
The data are from 2009 and 2011.

Viet Nam

Source

Vietnam Organic Agriculture Association, Hanoi, Vietnam

Contact

Nhung Tu Thi Tuyet, Vietnam Organic Agriculture Association, Hanoi, Vietnam

Note

Data include PGS

Zambia

Source

OPPAZ, Lusaka, Zambia. The data are from 2009. To these data, area data from one international certifier on beekeeping and beehives were added.

Zimbabwe

Source

Ecocert Southern Africa, Gardens Cape Town

Contact

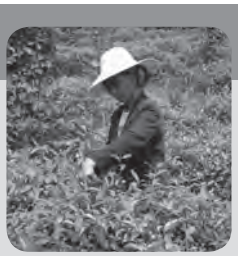
Clifyn Mckenzie, Ecocert Southern Africa, Gardens Cape Town

FiBL Market Development Services

www.fibl.org

Service Area – Quality Production

Is your agricultural production future-proof?



- ☐ *Agricultural consulting* – improving production technology and quality
- ☐ *Organic inputs* – enhancing access, technology and input efficiency
- ☐ *Transition management* – shifting from conventional to organic methods

Service Area – Quality Trade

Are your trading partners reliable?

- ☐ *Finding new business partners* – linking with promising new partners
- ☐ *Monitoring trading partners* – tools to assess trade relationships
- ☐ *Trade & certification* – harnessing diverse quality standards for trade

Service Area – Quality Processing

How do you make sure that your products excel?

- ☐ *Quality & risk management* – assessing risk in the whole production process
- ☐ *Improved storage & processing* – tackling critical factors to enhance value
- ☐ *Certification & documentation* – procedures to ensure annual approval

Service Area – Quality Marketing

Are your products optimally positioned in the market?

- ☐ *Marketing strategy development* – practical research to improve targeting
- ☐ *Residue analysis & mitigation* – interventions to ensure food safety
- ☐ *Product standards & certification* – implementation and documentation

FiBL
Forschungsinstitut für biologischen Landbau
Institut de recherche de l'agriculture biologique
Research Institute of Organic Agriculture
Istituto di ricerche dell'agricoltura biologica
Instituto de investigaciones para la agricultura orgánica

EXCELLENCE FOR SUSTAINABILITY

Contact FiBL, Department of International Cooperation, Ackerstrasse 113, P.O.-Box 219, CH-5070 Frick, Phone +41 62 865 72 72, Fax +41 62 865 72 73, info.suisse@fibl.org

Be Proud to be Part.

Transform your passion for Organic Agriculture into meaningful action - join IFOAM today!

IFOAM represents the interests of the Organic sector on an international level and is the only worldwide umbrella organization responsible for the creation and revision of the basic standards for Organic Agriculture.

The tangible benefits of IFOAM membership are extensive. From discounts on publications, conferences and events, to exclusive advertising opportunities and the wealth of information you receive, your business or organization will get all the tools it needs to grow and develop internationally.

IFOAM also offers significant political and structural benefits, playing a leading role in the social and political development of Organic Agriculture worldwide. IFOAM has among others official status with ECOSOC, FAO, IFAD, UNCTAD, UNEP, Codex Alimentarius and ISO.

For more information, contact: **membership@ifoam.org**

or apply online via www.ifoam.org/application.

IFOAM Head Office
Charles-de-Gaulle-Str. 5
53113 Bonn
Germany
Phone: +49 228 92650 10
Fax: +49 228 92650 99
membership@ifoam.org
www.ifoam.org

IFOAM
INTERNATIONAL FEDERATION OF ORGANIC AGRICULTURE MOVEMENTS

Organizer
Veranstalter
NürnbergMesse
Tel +49 (0) 9 11. 86 06-0
Fax +49 (0) 9 11. 86 06-82 28
info@nuernbergmesse.de

Patron
Schirmherr
IFOAM
International Federation of
Organic Agriculture Movements

National supporting organisation
Nationaler Ideeller Träger
BOLW
Bund Ökologische
Lebensmittelwirtschaft

Admission for trade visitors only | Zutritt nur für Fachbesucher

Organic agriculture is practiced in 164 countries, and more than 37.5 million hectares of agricultural land are managed organically by 1.9 million farmers. The global sales of organic food and drink reached almost 64 billion US dollars in 2012.

The 15th 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, information on standards and regulations as well as insights into current and emerging trends for organic agriculture in Africa, Asia, Europe, Latin America and the Caribbean, North America and Oceania.

In addition, the volume contains reports about the organic sector in Australia, Bangla Desh, Canada, Croatia, the Pacific Islands, the United Arab Emirates and the United States of America. Short updates are available from a number of countries in Asia as well as Latin America and the Caribbean.

The latest data are presented annually at BIOFACH in Nuremberg, Germany, 2015: 11 - 14 February.

Supported by

Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Confederation

Federal Department of Economic Affairs,
Education and Research EAER
State Secretariat for Economic Affairs SECO

BIOFACH
into organic

In cooperation with

Hivos people unlimited

SÖL

ORGANICDATA NETWORK

Co-funded by the European Union

ISBN IFOAM 978-3-944372-06-8
ISBN FiBL 978-3-03736-248-8