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INTERNATIONAL FEDERATION OF ORGANIC AGRICULTURE MOVEMENTS

THE WORLD OF ORGANIC AGRICULTURE

STATISTICS & EMERGING TRENDS 2009

OCEANIA 12.1 MILLION HA

EUROPE 7.8 MILLION HA

LATIN AMERICA 6.4 MILLION HA

ASIA 2.9 MILLION HA

NORTH AMERICA 2.2 MILLION HA

AFRICA 0.9 MILLION HA

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The World of Organic Agriculture

Statistics and Emerging Trends 2009

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Foreword Edition 2009

The Research Institute of Organic Agriculture (FiBL) and the International Federation of Organic Agriculture Movements (IFOAM) are proud to present the 2009 edition of 'The World of Organic Agriculture.' For the tenth time the data and information compiled in this volume document the current statistics, recent developments and trends in global organic farming. The comprehensive data are an important tool for stakeholders, policy makers, authorities, the industry and consultants. They can be useful in supporting strategies for organic agriculture and markets as well as for monitoring the impact of support activities for organic agriculture.

For this edition, the statistical information and all chapters have been updated. New additions include chapters on selected organic crops, on the organic farming related activities of UN Organizations, on food security, on group certification as well as detailed information on organic agriculture in the countries of Latin America and the Caribbean.

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

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Furthermore we are happy to count on the continuous support of Nürnberg Messe, the organizers of the BioFach World Organic Trade Fair.

Bonn and Frick, February 2009

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  www.biofach.de, www.nuernbergmesse.de

Abbreviations

APEDA: Agricultural & Processed Food Products Export Development Authority, India

AQIS: Australian Quarantine and Inspection Service

CACC: Certification, Accreditation and Compliance Committee of the US National Organic Standards Board (NOSB)

CBTF: Capacity Building Task Force on Trade, Environment and Development of the United Nations Conference on Trade and Development (UNCTAD) and the United Nations Environment Programme (UNEP)

EOAM: East African Organic Mark

EAOPS: East African Organic Product Standard

EPOPA: Export Promotion of Organic Products from Africa

EU: European Union

FAO: Food and Agriculture Organization of the United Nations

FiBL: Research Institute of Organic Agriculture, Switzerland

GTZ: German Society for Technical Cooperation and Development, Germany

IAASTD: International Assessment of Agricultural Knowledge, Science and Technology for Development

IAMB: Mediterranean Agronomic Institute of Bari, Italy

IFAD: International Fund for Agricultural Development

IFOAM: International Federation of Organic Agriculture Movements

IOAS: International Organic Accreditation Service

ICROFS: International Center for Research in Organic Food Systems, Denmark

IFPRI: International Food Policy Research Institute

ITC: International Trade Centre, Geneva

JAS: Japan Agricultural Standard

KEBS: Kenya Bureau of Standards

MOAN: Mediterranean Organic Agriculture Network, Italy

NOGAMU: National Organic Agricultural Movement of Uganda

NOSB: US National Organic Standards Board

NGO: Non-governmental organization

NOP: National Organic Program of the United States

OTA: Organic Trade Association, USA

SECO: Swiss State Secretariat for Economic Affairs

SIDA: Swedish International Development Cooperation Agency

SME: Small and Medium Enterprises

UNCTAD: United Nations Conference on Trade and Development

UNEP: United Nations Environment Programme

UNESCO: United Nations Educational, Scientific and Cultural Organization

USDA: United States Department of Agriculture

WTO: World Trade Organization

ZMP: Central Market and Price Report Office, Germany

The World of Organic Agriculture 2009: Summary

HELGA WILLER[1]

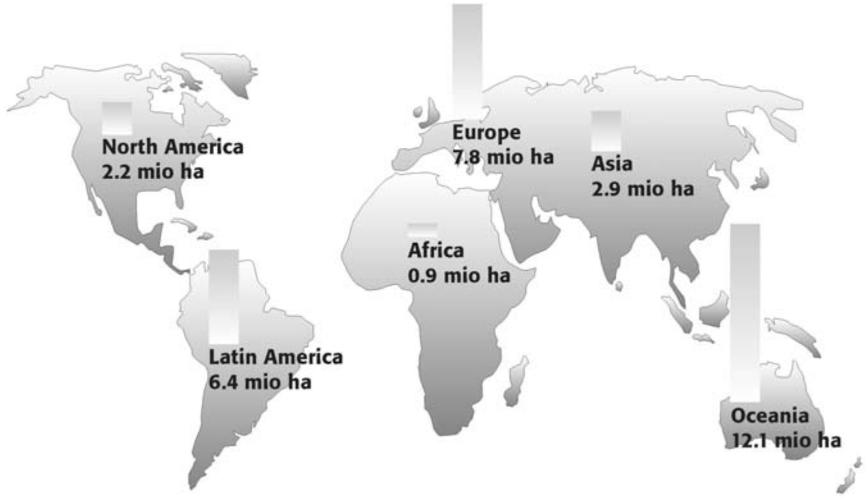
Recent statistics

Organic agriculture is developing rapidly, and statistical information is now available from 141 countries of the world. Its share of agricultural land and farms continues to grow in many countries. The main results of the global survey on certified organic farming show:

- 32.2 million hectares of agricultural land are managed organically by more than 1.2 million producers, including smallholders (2007). In addition to the agricultural land, there are 0.4 million hectares of certified organic aquaculture.
- The regions with the largest areas of organically managed agricultural land[2] are Oceania, Europe and Latin America. Australia, Argentina and Brazil are the countries with the largest organically managed land areas.
- The highest shares of organically managed land are in Europe: Liechtenstein, Austria and Switzerland.
- The countries with the highest numbers of producers are Uganda, India and Ethiopia. Almost half of the world's organic producers are in Africa.
- About one third of the world's organically managed land – almost 11 million hectares - is located in developing countries. Most of this land is in Latin American countries, with Asia and Africa in second and third place. Countries with the largest area under organic management are Argentina, Brazil, China, India and Uruguay.
- Almost 31 million hectares are organic wild collection areas and for bee keeping. The majority of this land is in developing countries – quite the opposite of agricultural land, of which two thirds is in developed countries.
- Almost two thirds of the land under organic management is grassland (20 million hectares). The cropped area (arable land and permanent crops) constitutes 7.8 million hectares - a quarter of the organically managed land. Compared with the previous survey, there is a clear trend for cropland to increase. Relatively high shares for some crops have been achieved; organically managed coffee and olive areas reported, for instance, account for more than five percent of the total harvested areas, and in some countries the shares are even higher – 30 percent of Mexico's coffee is organic.
- On a global level, the organic land area increased by almost 1.5 million hectares compared to the data from 2006. Twenty-eight percent (or 1.4 million hectares) more land under organic management was reported for Latin America (including 0.9 million hectares of in-conversion land in Brazil for which no data had been available previously). In Europe, organically managed land increased by 0.33 million hectares (+ 4 percent) and by 0.18 million hectares (+27 percent) in Africa.

[1] Dr. Helga Willer, Communication, Research Institute of Organic Agriculture (FiBL), Ackerstrasse, 5070 Frick, Internet www.fibl.org

[2] The term 'organically managed land' etc. refers to certified organic agriculture and includes both the certified in-conversion areas and the certified fully converted areas.



Map 1: Land under organic management by region 2007

Source: FiBL/IFOAM

Market

Global demand for organic products remains robust, with sales increasing by over five billion US Dollars[1] a year. Organic Monitor estimates international sales to have reached 46.1 billion US Dollars in 2007. Consumer demand for organic products is concentrated in North America and Europe; according to Organic Monitor these two regions comprise 97 percent of global revenues. Asia, Latin America and Australasia are important producers and exporters of organic foods. Exceptionally high growth rates have led supply to tighten in almost every sector of the organic food industry: fruits, vegetables, beverages, cereals, grains, seeds, herbs and spices. With the financial crisis, Organic Monitor expects positive market growth rates to continue, albeit at lower rates than previous years (see chapter on the global market by Amarjit Sahota).

Standards and regulations

On January 1, 2009, the completely revised Regulation on Organic Production - EU Regulation (EC) 834/2007 - and its implementation rules came into force. Farmers in Europe, as well as those from importing countries, will have to deal with the new regulation and its changed rules. Currently, 71 countries have implemented regulations on organic farming,

[1] 1 US Dollar = 0.73082 Euros. Average exchange rate 2007

and 21 countries are in the process of drafting a regulation (see chapter on standards and regulations by Beate Huber and Otto Schmid). 481 organizations worldwide offer organic certification services. Most certification bodies are in the European Union, the United States, Japan, South Korea, China, Canada, and Brazil (see chapter on certification bodies by Gunnar Rundgren).

The UNCTAD-FAO-IFOAM International Task Force on Harmonization and Equivalence in Organic Agriculture (ITF) has worked from 2003 to 2008 to reduce technical barriers to trade in organic agricultural products that result from the lack of harmonization and interoperability of organic regulations, private standards and certification requirements. At a launch in Geneva in October 2008, two tools that were developed by the ITF were presented to the public: the Tool for Equivalence (EquiTool), an international guideline for determining equivalence of organic standards and the International Requirements for Organic Certification Bodies (IROCB). A 'Beyond ITF' project is envisaged to promote uptake of the ITF recommendations and tools and assist developing countries (see articles by Sophia Twarog and Asad Naqvi).

Africa

In Africa, there are almost than 900'000 hectares of certified organic agricultural land. This constitutes about three percent of the world's organic agricultural land. 530'000 producers were reported. The countries with the most organic land are Uganda (296'203), Tunisia (154'793 Hectares), and Ethiopia (140'308 hectares). The highest shares of organic land are in Sao Tome and Prince (5 percent), Uganda (2.3 percent) and Tunisia (1.6 percent). The majority of certified organic produce is destined for export markets, with the large majority being exported to the European Union, which is Africa's largest market for agricultural produce. The African market for organic products is still small. Three countries have an organic regulation and seven are in the process of drafting one. The first African Organic Conference, to be held in Kampala, Uganda, from May 19-22, 2009 will provide a good opportunity to mobilize support for organic agriculture (see chapter on organic farming in Africa by Hervé Bouagnimbeck).

Asia

The total organic area in Asia is nearly 2.9 million hectares. This constitutes nine percent of the world's organic agricultural land. 230'000 producers were reported. The leading countries are China (1.6 million hectares) and India (1 million hectares). The highest shares of organic land of all agricultural land are in Timor Leste (seven percent). Organic wild collection areas play a major role in India and China.

Production of final processed products is growing, although a majority of production is still fresh produce and field crops with low value-added processing, such as dry or processed raw ingredients. Aquaculture (shrimp and fish) on the other hand, is emerging in China, Indonesia, Vietnam, Thailand, Malaysia and Myanmar. Textiles is another important trend. Sector growth is now also driven by imports, and local markets have taken off in many of the big cities in the South and Eastern part of region besides Japan, South Korea, Taiwan and Singapore. Kuala Lumpur, Manila, Bangkok, Beijing, Shanghai, Jakarta, Delhi, Bangalore and other cities are increasing internal consumption of organic products. Nine organic regulations are in place. In seven countries work on national standards and regulations is in progress (see chapter by Ong Kung Wai on organic farming in Asia).

Europe

As of the end of 2007, 7.8 million hectares in Europe were managed organically by more than 200'000 farms. In the European Union, 7.2 million hectares were under organic management, with more than 180'000 organic farms. 1.9 percent of the European agricultural area and four percent of the agricultural area in the European Union is organic. Twenty-four percent of the world's organic land is in Europe. The countries with the largest organic area are Italy (1'150'253 hectares), Spain (988'323 hectares) and Germany (865'336 hectares). The highest percentages are in Liechtenstein (29 percent), Austria (13 percent) and Switzerland (11 percent). Compared to 2006, organic land increased by more than 0.3 million hectares. Sales of organic products were approximately 16 billion Euros in 2007. The largest market for organic products in 2007 was Germany with a turnover of 5.3 billion Euros (2008: 5.8 billion Euros), followed by the UK (2.6 billion Euros), France and Italy (both 1.9 billion Euros). As a portion of the total market share, the highest levels have been reached in Austria, Denmark and Switzerland, with around five percent for organic products. The highest per capita spending is also in these countries.

Support for organic farming in the European Union and the neighboring countries includes grants under rural development programs, legal protection and a European as well as national action plans. One of the key instruments of the European Action Plan on organic food and farming, an information campaign, was launched during 2008, with the aim of increasing awareness of organic farming throughout the European Union. Furthermore, most EU member states have national action plans. In order to boost organic farming research, a technology platform joining the efforts of industry and civil society in defining organic research priorities and defending them vis-à-vis the policy-makers was launched in December 2008. The platform's vision paper reveals the potential of organic food production to mitigate some of the major global problems from climate change and food security, to the whole range of socio-economic challenges in the rural areas.

Latin America

In Latin America, 220'000 producers managed 6.4 million hectares of agricultural land organically in 2007. This constitutes 20 percent of the world's organic land. The leading countries are Argentina (2'777'959 hectares), Brazil (1'765'793 hectares) and Uruguay (930'965 hectares). The highest shares of organic agricultural land are in the Dominican Republic and Uruguay with more than six percent and in Mexico and Argentina with more than two percent. Most organic production in Latin America is for export. Important crops are tropical fruits, grains and cereals, coffee and cocoa, sugar and meats. Most organic food sales in the domestic markets of the countries occurs in major cities, such as Buenos Aires and São Paulo.

Fifteen countries have legislation on organic farming, and four additional countries are currently developing organic regulations. Costa Rica and Argentina have both attained third country status according to the EU regulation on organic farming.

In recognition of the growing importance of the organic sector to Latin America's agricultural economy, governmental institutions have begun to take steps towards increasing involvement; governments are beginning to play a central role in the promotion of organic agriculture. The types of support in Latin American countries range from organic agriculture promotion programs to market access support by export agencies. In a few countries, limited financial support is being given to pay certification cost during the conversion period. An important process underway in many Latin America countries is the establishment of regulations and standards for the organic sector (see chapter on Latin America by Salvador Garibay).

North America

In North America, almost 2.2 million hectares are managed organically, representing approximately a 0.6 percent share of the total agricultural area. Currently, the number of farms is 12'064. The major part of the organic land is in the US (1.6 million hectares in 2005). Seven percent of the world's organic agricultural land is in North America.

Valued at more than 20 billion US Dollars in 2007 (Organic Monitor), the North American market accounted for 45 percent of global revenues. Growing consumer demand for healthy & nutritious foods and increasing distribution in conventional grocery channels are the major drivers of market growth (see chapter on organic farming in the U.S. by Barbara Haumann). The U.S. organic industry grew 21 percent in sales in 2006, and was forecast to experience 18 percent sales growth each year on average from 2007 through 2010. Whether this rate will actually be realized is uncertain due to the economic downturn and reduction in consumer spending in the last quarter of 2008. Likewise, a downturn is expected in Canada, even though the market growth in Canada, paired with the introduction of the new organic regulations, should provide a good outlook over the coming years.

In the United States, the National Organic Program has been in force since 2002. Canada has had a strong organic standard since 1999; this had been, however, voluntary and not supported by regulation. Canada's Organic Product Regulation will be fully implemented on June 30, 2009. Canadian labeling requirements will very similar to those of the US and the EU. In 2008, the new Farm Bill was passed by the US Congress. Increasing expenditures on organic agriculture and programs to approximately 112 million US Dollars[1] over the course of its five-year life, the 2008 Farm Bill provides a five-fold increase for the organic sector compared with federal funding in the previous bill.

Oceania

This region includes Australia, New Zealand, and island states like Fiji, Papua New Guinea, Tonga and Vanuatu. Altogether, there are 7'222 producers, managing almost 12.1 million hectares. This constitutes 2.6 percent of the agricultural land in the area and 38 percent of the world's organic land. Ninety-nine percent of the organically managed land in the region is in Australia (12 million hectares, 97 percent extensive grazing land), followed by New Zealand (65'000 hectares) and Vanuatu (8'996 hectares). The highest shares of all agricultural land are in Vanuatu (6.1 percent), Samoa (5.5 percent) and the Solomon Islands

[1] Average exchange rate 2008: 1 US Dollar = 0.68341 Euros. Source: The OANDA homepage at www.oanda.com

(3.1 percent). Growth in the organic industry in Australia, New Zealand and the Pacific Islands has been strongly influenced by rapidly growing overseas demand; domestic markets are, however, growing. In New Zealand, a key issue is lack of production to meet growing demand.

Australia has had national standards for organic and biodynamic products in place since 1992, and like New Zealand, it is on the third country list of the European Union. It is expected that the Australian Standard, based on the National Standard employed since the early 1990s for the export market, will be adopted in 2009. In New Zealand, a National Organic Standard was launched in 2003. There is little government support to encourage organic agriculture in Australia. However, over the recent past, governments have been supportive of the Australian Standards issue. Furthermore, funding is made available to promote an understanding among consumers. In New Zealand, through the establishment of the sector umbrella organization Organics Aotearoa New Zealand and the Organic Advisory Programme as well as other initiatives, there is political recognition of the benefits of organic agriculture (see chapters on Australia and New Zealand by Els Wynen and Seager Mason).

In the Pacific Islands work on a regional strategy and national plans to lay the foundation of sustainable organic agriculture development in the region is in progress. The Regional Organic Task Force, a technical group representing all sectors and countries involved in organics, was charged with developing the Pacific Standard and will be responsible for implementing the Regional Action Plan. Pacific High Level Organics Group consists of Pacific leaders who have shown a commitment to the development of organic agriculture in the region and provide high level political support and advocacy. The first Pacific Organic Standard was endorsed by Pacific Leaders in September 2008. This provides a platform for further regional policy development around organic agriculture (see chapter on the development of organic agriculture in the Pacific region by Karen Mapusua).

Developments within IFOAM

Under the leadership of its new World Board, elected at the general assembly in Vignola, Italy, in June 2008, the International Federation of Organic Agriculture Movements (IFOAM) will continue to work on further enhancing organic growth in 2009, through advocacy, the facilitation of trade, and capacity building. In particular, IFOAM will be working on a new leadership program: Education and training, both vocational and academic, play an important role in disseminating the benefits of organic agriculture at all levels.

The 1st International IFOAM Conference on Animal and Plant Breeding 'Breeding Biodiversity' will bring both animal and plant breeding together in 2009 for one international conference with the aim of explicitly highlighting the important interdependences and holistic approaches of organic agriculture.