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THE WORLD OF ORGANIC AGRICULTURE

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EUROPE 15.6 MILLION HA

LATIN AMERICA 8 MILLION HA

ASIA 6.5 MILLION HA

NORTH AMERICA 3.3 MILLION HA

AFRICA 2 MILLION HA

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The World of Organic Agriculture Statistics and Emerging Trends 2020

Edited by Helga Willer, Bernhard Schlatter, Jan Trávníček, Laura Kemper and Julia Lernoud

For the PDF version, corrigenda, supplementary material see http://www.organic-world.net/yearbook/yearbook-2020.html

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Glossary

€/person: Per capita consumption in euros
AfrONet: African Organic Network
AMI: Agrarmarkt-Informationsgesellschaft - Agricultural Market Information Company, Germany
AOC: African Organic Conference
AU: African Union Commission
AUC: African Union Commission
CAP: Common Agricultural Policy of the European Union
CAADP: Comprehensive Africa Agriculture Development Programme
CIHEAM: Centre international de hautes études agronomiques méditerranéennes
CNCA: China National Certification and Accreditation Administration
COTA: Canada Organic Trade Association, Canada
CPC: Candidates and Potential Candidates for the European Union
CSC: Continental Steering Committee of the Ecological Organic Agriculture Initiative for Africa (EOA-I)
EFTA: European Free Trade Association
EOA(-I): Ecological Organic Agriculture (Initiative for Africa)
EU: European Union
EU-28: Member countries of the European Union
EU-NACOA: EU/North-African Conference on Organic Agriculture
Eurostat: Statistical office of the European Union, Luxembourg
FAO: Food and Agriculture Organisation of the United Nations
FAOSTAT: Statistics Division of FAO, the Food and Agriculture Organisation of the United Nations
FiBL: Forschungsinstitut für biologischen Landbau – Research Institute of Organic Agriculture, Switzerland
GOTS: Global Organic Textile Standard
Ha: Hectares
Horizon 2020: Research and Innovation programme of the European Union, running from 2014 to 2020
HS codes: Harmonized System Codes
ISOFAR: International Society of Organic Agriculture Research, Germany
ITC: International Trade Centre, Switzerland
Mio.: Million
MOAN: Mediterranean Organic Agriculture Network, Italy
MT: Metric tons
NASAA: National Association for Sustainable Agriculture, Australia
NOARA: Network of Organic Agriculture Researchers in Africa
OTA: Organic Trade Association, United States of America
PGS: Participatory Guarantee Systems
POETcom: Pacific Organic and Ethical Trade Community
SDC: wiss Agency for Development and Cooperation
SECO: State Secretariat for Economic Affairs, Switzerland
SÖL: Stiftung Ökologie & Landbau – Foundation Ecology & Agriculture, Germany
SOAAN: Sustainable Organic Agriculture Action Network
TP Organics: European Technology Platform for Organic Food and Farming
U.S.: United States
USDA: United States Department of Agriculture

Foreword from SECO and ITC

The adoption of organic agricultural practices contributes greatly to the targets set by the Sustainable Development Goals (SDGs). In such a dynamic field, access to good quality data on organic farming not only helps to measure success toward achieving these SDGs but also to orient decision-makers and other stakeholders along the whole value chain. Data can also support the development of a favourable policy environment, reliable regulations and standards, as well as transparency in the organic sector.

Once again, increasing demand for organic products stimulated growth in the organic sector with organic food sales surpassing the 100 billion US dollar mark for the first time in 2018. Double-digit growth rates were recorded in many advanced markets for organic products. The production side is also keeping pace: The latest data shows that organic farmland has grown in many countries, and the total organic area increased to more than 70 million hectares, managed by almost 2.8 million producers..

By providing dynamic and easy access to organic market and production data, the Swiss State Secretariat for Economic Affairs (SECO) and the International Trade Centre (ITC) aim to support decision-makers in governmental administrations, development agencies, NGOs, and other actors of the international organic industry.

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

Dr. Monica Rubiolo
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Foreword from FiBL and IFOAM – Organics International

With the 21sr edition, FiBL and IFOAM – Organics International proudly present a new edition of "The World of Organic Agriculture."

Data collection as such is a major and constant concern of the Research Institute of Organic Agriculture (FiBL) and IFOAM – Organics International. The comprehensive data provided over the past two decades in this publication serve as an important tool for stakeholders, policymakers, authorities, and the industry, as well as for researchers and extension professionals. It has also proven useful for development programs and supporting strategies for organic agriculture and markets, and crucial for monitoring the impact of these activities. The publication also shows our ongoing engagement with transparency in the organic sector; the method of collecting the data has been refined over time to reflect the global status of organic as much as possible. "The World of Organic Agriculture" has become one of the most frequently quoted pieces of literature in scientific, technical, and descriptive papers and reports on organic agriculture.

This publication also demonstrates the contribution of organic agriculture to the Sustainable Development Goals set by the United Nations. Given that organic agriculture touches on almost all of the goals, this book not only shows the land area, number of producers, and market figures; it also highlights the contribution of organic agriculture to tackling climate change, ensuring food and nutrition security, halting biodiversity loss, and promoting sustainable consumption, to name a few. Overall, "The World of Organic Agriculture" shows the potential organic farming has to contribute to a sustainable future!

We are grateful to the Swiss State Secretariat for Economic Affairs (SECO), the International Trade Centre (ITC), the Coop Sustainability Fund and NürnbergMesse for supporting this publication. 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.

Lastly, we would like to thank the editorial team for their dedication and engagement, and we would also like to express our thanks to the other members of the FiBL team, who support the activities surrounding the data collection.

Frick and Bonn, February 2020

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

Louise Luttikholt
Executive Director
IFOAM – Organics International
Bonn, Germany

Foreword from the Editors

In the 21st edition of "The World of Organic Agriculture", we present the latest available data on organic agriculture.

Again, many experts have provided valuable data, and we are very grateful to our data and information suppliers from all over the world!

Knowledgeable authors once again contributed articles about their regions, their countries, or their fields of expertise, including the global market report, public standards and legislation, Participatory Guarantee Systems, policy support as well as organic cotton.

This edition of the World of Organic Agriculture includes some novelties: We are very happy that we can provide the latest (and first) statistics data on imports in the European Union along with an article by Elena Panichi from the European Commission.

Another novelty is the article with statistics on Internal Control Systems (ICS) by Florentine Meinshausen and colleagues. This article includes not only data on the extent of ICS but also pertinent background information. Furthermore, we have the pleasure to be able to present statistics from Demeter International.

For the crop chapter in this edition, we did not update the existing crop texts, but instead, we are presenting graphs: A map on the global distribution by country for a given crop/crop group, its development, the top countries in terms of organic area and organic share of the total area, the distribution by continent and, in the case of crop groups, the breakdown by crop. All of these graphics are based on interactive Power BI graphs, which you can explore at https://statistics.fibl.org/visualisation.html.

Finally, we wish to announce that the Chinese edition of "The World of Organic Agriculture" will be published for the 9th time by the Organic and Beyond company.

We want to express our warm gratitude to everyone who makes this report possible!

Helga Willer, Bernhard Schlatter, Jan Trávníček, Laura Kemper and Julia Lernoud

Research Institute of Organic Agriculture FiBL, Frick, Switzerland

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Organic Agriculture: Key Indicators and Top Countries

Indicator	World	Top countries
Countries with organic activities[1]	2018: 186 countries	
Organic agricultural land	2018: 71.5 million hectares (1999: 11 million hectares)	Australia (35.7 million hectares) Argentina (3.6 million hectares) China (3.1 million hectares)
Organic share of total agricultural land	2018: 1.5 %	Liechtenstein (38.5 %) Samoa (34.5 %) Austria (24.7 %)
Wild collection and further non-agricultural areas	2018: 35.7 million hectares (1999: 4.1 million hectares)	Finland (11.3 million hectares) Zambia (3.2 million hectares) Tanzania (2.4 million hectares)
Producers	2018: 2.8 million producers (1999: 200'000 producers)	India (1'149'371) Uganda (210'352) Ethiopia (203'602)
Organic market[2]	2018: 96.7 billion euros (2000: 15.1 billion euros)	US (40.6 billion euros) Germany (10.9 billion euros) France (9.1 billion euros)
Per capita consumption	2018: 12.8 euros	Switzerland (312 euros) Denmark (312 euros) Sweden (231 euros)
Number of countries with organic regulations	2018: 103 countries	
Number of affiliates of IFOAM – Organics International	2018: 779 affiliates from 110 countries	Germany - 79 affiliates India - 55 affiliates China - 45 affiliates United States - 48 affiliates

Source: FiBL survey 2020, based on national data sources and data from certifiers

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

[2] Please note that there are some differences in organic food sales figures from Ecovia Intelligence and those from FiBL due to different methodologies. According to Ecovia Intelligence, global retail sales reached over 105 billion US dollars in 2018. One euro corresponded to 1.1810 US dollars in 2018 according to the European Central Bank.

The World of Organic Agriculture 2020: Summary

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The latest available data on organic agriculture worldwide show that the year 2018 was another good year for global organic agriculture. According to the latest FiBL survey on organic agriculture worldwide, the organic farmland and organic retail sales continued to grow and reached another all-time high, as shown by the data from 186 countries (data as of the end 2018).

More than 71.5 million hectares of organic farmland

In 2018, 71.5 million hectares of organic agricultural land, including in-conversion areas, were recorded. The regions with the largest areas of organic agricultural land are Oceania (36 million hectares, which is half the world's organic agricultural land) and Europe (15.6 million hectares, 22 percent). Latin America has 8 million hectares (11 percent) followed by Asia (6.5 million hectares, 9 percent), North America (3.3 million hectares, 5 percent), and Africa (2 million hectares, 3 percent).

Australia has the largest area

The countries with the most organic agricultural land are Australia (35.7 million hectares), Argentina (3.6 million hectares), and China (3.1 million hectares).

Globally, 1.5 percent of the farmland is organic

Currently, 1.5 percent of the world's agricultural land is organic. The highest organic shares of the total agricultural land, by region, are in Oceania (8.6 percent) and Europe (3.1 percent; European Union 7.7 percent).

Liechtenstein has the highest organic share with 38.5 percent

Some countries reach far higher shares than the global share: Liechtenstein (38.5 percent) and Samoa (34.5 percent) have the highest organic shares. In sixteen countries, 10 percent or more of the agricultural land is organic.

Growth in organic farmland - Increase of 2.0 million hectares or 2.9 percent

Organic farmland increased by 2.02 million hectares or 2.9 percent in 2018. Many countries reported a significant increase, for instance France (16.7 percent increase; over 0.27 million hectares more) and Uruguay (14.1 percent increase; almost 0.24 million hectares more).

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Increase of organic farmland in all regions

There was an increase in organic agricultural land in all regions. In Europe, the area grew by almost 1.25 million hectares (8.7 percent increase). In Asia, the area grew by almost 8.9 percent or an additional 0.54 million hectares; in Africa, the area grew by 0.2 percent or over 4′000 hectares; in Latin America, the area grew by 0.2 percent or 13′000 hectares; in North America by more than 3.5 percent or almost 0.1 million additional hectares; and in Oceania, the area grew by 0.3 percent or over 0.1 million hectares.

Apart from the organic agricultural land, there is organic land dedicated to other activities, most of which are areas for wild collection and beekeeping. Further areas include aquaculture, forests, and grazing areas on non-agricultural land. These areas of non-agricultural land constitute more than 35.7 million hectares (see page 52).

Growth in most major crop groups

Land use and crop details were available for over 92 percent of the organic agricultural land. Unfortunately, some countries with very large organic areas, such as Brazil and India, had little or no information on their land use (see page 77).

Over two-thirds of the agricultural land was grassland/grazing areas (over 48.2 million hectares), which increased in 2018 by 2.9 percent.

With a total of over 13.3 million hectares, **arable land constitutes 18.6 percent of the organic** agricultural **land**. An increase of almost 4.9 percent since 2017 was reported. Most of this category of land was used for cereals including rice (4.5 million hectares), followed by green fodder from arable land (almost 3.9 million hectares), oilseeds (1.5 million hectares), dry pulses and textile crops.

Detailed information on **organic cotton** was provided by Textile Exchange, who states that 2017/18 was a year to celebrate in the organic cotton sector. Not only did global production of organic cotton see an impressive 56 percent growth; it also represented the highest volume seen since 2010/11 with a global total of 180’871 metric tons in 2017/18. The growth stemmed predominantly from India, China and Kyrgyzstan, but also from Turkey, Tanzania, and Tajikistan. For more information, see Barsley et al. on page 142.

Permanent crops account for seven percent of the organic agricultural land, amounting to over 4.7 million hectares. Compared to the previous survey, a decrease of more than -140’000 hectares, or 2.9 percent, was reported; mainly due to fact that less coffee and tropical fruit was reported for Mexico. The most important crops are olives, with nearly 0.9 million hectares or 18 percent, nuts (over 0.7 million hectares or 15 percent), coffee (over 0.7 million hectares or 15 percent), grapes (0.4 million hectares or 9 percent), coconut (0.4 million hectares or 8 percent), and cocoa (over 0.3 million hectares or 7 percent) (see page 72).

Organic producers on the rise – 2.8 million producers in 2018

There were at least 2.8 million organic producers in 2018.[1] Forty-seven percent of the world's organic producers are in Asia, followed by Africa (28 percent), Europe (15 percent) and Latin America (8 percent). The countries with the most producers are India (1'149'371), Uganda (210'352), and Ethiopia (203'602) (see page 58). There has been a decrease in the number of producers of almost 150'000, or 5 percent, compared to 2017.

Global market and EU organic imports

Global market has reached more than 95 billion euros

Although organic food sales are growing at a healthy rate, there are still persistent challenges. For example, demand for organic foods remains concentrated in North America and Europe. Although the share of these two regions is declining, they still comprise a large part of global sales. Conversely, it has been challenging for strong local markets to develop in Asian, Latin American and African countries. For more information, see the chapter by Sahota on page 138.

Organic food and drink sales reached more than 95 billion euros according to FiBL (page 65)[2,3] in 2018. In 2018, the countries with the largest organic markets were the United States (40.6 billion euros), Germany (10.9 billion euros), and France (9.1 billion euros). The **largest single market was the United States** (42 percent of the global market), followed by the European Union (37.3 billion euros, 38.5 percent), and China (8.1 billion euros, 8.3 percent). The highest per-capita consumption in 2018, with 312 euros, was found in Switzerland and Denmark. The highest organic market shares were reached in Denmark (11.5 percent), the first country to reach an organic market share of over ten percent, Switzerland (9.9 percent) and Sweden (9.6 percent) (See the chapter on the FiBL survey on the global market, page 65).

Organic imports in the European Union

The European Union, which is the second-biggest organic market, provided data on its organic imports, showing, for the first time, the key import products and key importing countries (based on volume in metric tons). In 2018, the EU imported a total of 3.3 million tonnes of organic agri-food products. Imports of tropical fruit (fresh or dried), nuts and spices represented the single biggest category, totalling 793'597 tonnes or 24.4 percent of total imports, followed by oilcakes, cereals other than wheat, as well as rice, and wheat. China is the biggest supplier of organic agri-food products

[1] Please note that some countries report only the numbers of companies, projects, or grower groups, which may each comprise a number of individual producers. 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.

[2] Please note that there are some differences in organic food sales figures from Ecovia Intelligence and those from FiBL due to different methodologies. According to Ecovia Intelligence, global retail sales reached over 105 billion US dollars in 2018.

[3] One euro corresponded to 1.1810 US dollars in 2018 according to the European Central Bank.

to the EU, with 415'243 tonnes of produce; that is 12.7 percent of the total organic import volume. Ecuador, the Dominican Republic, Ukraine and Turkey each have an 8 percent share of the total organic import volume. For more information, see contribution by Panichi on page 142).

Standards, legislation, policy support

According to the IFOAM survey on **standards and legislation**, 84 countries had organic standards in 2019, and 17 countries were in the process of drafting legislation. The European Union (EU) adopted the basic act of its new organic regulation in 2018, which will come into force in 2021. In 2018, the secondary legislation – the delegated and implementing act for production, labelling, controls, and trade – started to be drafted and adopted, in a process that will continue in 2020. One important change refers to group certification, which is currently only allowed in relation to the control of small operators in developing countries (as defined by OECD[1]). With the new regulation, it will be allowed everywhere in the world, including the EU. Group certification means that a certain number of small farmers can get organised and be certified as a single entity. For more information, see the chapter by Busacca et al. page 150.

In the recent study "**Group Certification: Internal Control Systems in Organic Agriculture: Significance, Opportunities and Challenges,**" FiBL and IFOAM examined the current scale and scope of group certification by region and country. According to FiBL estimates, about 80 percent of the world's organic producers are smallholders in low and middle-income countries (58 countries in total), for whom individual certification would be unaffordable and administratively too complex to manage. In total, 2.6 million producers were organized in 5800 internal control system (ICS) groups and managed 4.5 million hectares of organic land in 2018 (For more information, see chapter by Meinshausen et al. on page 159).

In the article "**The Mainstreaming of Organic Agriculture in the Himalaya Region**", the policy contexts in Bhutan, India and Nepal are analysed. Over the last ten years, Bhutanese, Nepalese, and Indian policymakers have increasingly recognised the need to transition towards sustainable agriculture, including organic agricultural systems, to preserve their natural resources and improve livelihoods for their rural populations. However, there are also challenges associated with this transition. More information can be found in the article by Varini on page 178.

Participatory Guarantee Systems (PGS) are locally focused quality assurance systems. PGS have proven to be an affordable alternative to third-party certification, an effective tool to develop local markets for organic produce and are particularly appropriate for small-scale farmers. Since 2004, the number of PGS initiatives has been growing on all continents, and they now represent a well-established guarantee

[1] Development Assistance Committee (DAC) list of Official Development Assistance (ODA) recipients: http://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/daclist.htm

system for Organic Agriculture in many countries. In 2019, ten countries had recognised PGS as a guarantee system to ensure the organic quality of products at the national level. In 2019, IFOAM – Organics International recorded 223 PGS initiatives in 76 countries in its PGS database, with at least 567'142 producers involved. Of these producers, 496'104 were certified. For more information, see the chapter by Katto-Andrighetto et al. on page 164.

Statistics provided by **Demeter** International show that there are more than 5'900 Demeter farmers worldwide with over 200'000 hectares in 63 countries (June 2019). Demeter International was founded in 1997 and currently has 19 members and four guest members from Europe, America, Africa, New Zealand and India. For details see article by Simpfendörfer and Fischer, page 173.

Organic in the Continents

Africa

There were more than **2 million hectares of certified organic agricultural land in Africa** in 2018. Compared to 2017, Africa reported an increase of 4'130 hectares, a 0.2 percent increase. There were at least 806'000 producers. Tunisia was the country with the largest organic area (with almost 306'500 hectares in 2017), and Uganda had the largest number of organic producers (more than 210'000). The country with the highest organic share of the total agricultural land in the region was the island state Sao Tome and Principe, with 22.5 percent of its agricultural area being organic. The majority of certified organic products in Africa are destined for export markets. Key crops are coffee, olives, nuts, cocoa, oilseeds, and cotton (see page 193). Four countries in Africa have legislation on organic agriculture, and six countries are in the process of drafting legislation. Five countries have a national standard but no organic legislation.

In Africa, significant efforts have been made in mainstreaming organic agriculture into policy, national extension systems, marketing and value chain development, and curricula of some academic institutions and African-led research activities in the continent. Partners of the Ecological Organic Agriculture Initiative (EOA-I) established databases to make research findings and knowledge on Ecological Organic Agriculture (EOA) available and accessible by various users. Multi-stakeholder platforms with varying membership compositions have been established in all eight participating EOA-I countries (Benin, Ethiopia, Kenya, Mali, Nigeria, Senegal, Tanzania and Uganda) and consequently, some countries have made good progress in advocating for policy change by having polices enacted and introducing policy drafts. The African Union (AU)-led EOA-I Continental Steering Committee (CSC) provided strategic guidance on the implementation of EOA in Africa as informed by various efforts including urging Ministers of the Ordinary Session of the Specialized Technical Committee on Agriculture, Rural Development, Water and Environment to approve important elements of mainstreaming organic agriculture into national, policy, plans and programs. Several important conferences took place:

The 1st International Conference on Agroecology Transforming Agriculture and Food Systems in Africa (June 2019) in Nairobi, Kenya; the 5th West African Organic Conference ("Organic Agriculture: Life for All") by the West African Organic Network held in Ghana from 12th to 15th November, the 1st EU/North-African conference on organic agriculture focusing on "Bridging the gap, empowering organic Africa" in Marrakesh, Morocco from 11-12 November. The Network of Organic Agriculture Researchers in Africa (NOARA) rigorously stepped up its activities with the registration of over 200 members from 16 countries, cutting across all regions of Africa and three non-African countries that contributed to various organic agriculture conferences that took place in Africa. The network launched its maiden edition of the African Journal of Organic Agriculture and Ecology (AJOAE) during the 5th West Africa Organic Conference and is currently leading the process of developing a demand-driven Organic Agriculture Research Agenda for Africa 2030 **(**OARAA 2030) with a multi-stakeholder approach, expected to be completed by June 2020. The momentum for supporting organic agriculture in Africa has picked up and more progress is expected in the coming years. For more information, see the chapter by Gama and Amudavi, page 186.

Asia

The total area dedicated to **organic agriculture in Asia was more than 6.5 million hectares in 2018**. There were 1.3 million producers, most of which were in India. The leading countries by area were China (3.1 million hectares) and India (over 1.9 million hectares). Timor-Leste had the highest proportion of organic agricultural land (16.8 percent) (page 209). Seventeen countries in the region have legislation on organic agriculture, and eight countries are in the process of drafting legislation.

Significant achievements were observed in some Asian countries in 2019, such as the launch of the third version of the national organic standard in China. Similarly, the National Organic Agriculture Board of the Philippines approved the resolution for the inclusion of Participatory Guarantee Systems (PGS) in the national organic standards. In South Korea, a pilot program started to provide environment-friendly rice to military bases, and the central government approved the budget to provide a box scheme of environmentally-friendly food to pregnant women. Both initiatives are expected to boost organic farming substantially. The demand for organic food in Asia continues to grow fast, and it is uncertain whether the supply of local organic produce can keep up with the ever-increasing demand (see chapter by Hossein and Chang on page 202).

The dynamic nature of the organic sector in Asia is shown by the many activities taking place on the continent: In China and the Philippines IFOAM Asia opened country offices, and global interest in the Asian Local Governments for Organic Agriculture (ALGOA)[1] grew with the hosting of the International Organic Agriculture

[1] Asian Local Governments for Organic Agriculture (ALGOA) is a sub-organization under IFOAM Asia and is legally registered in South Korea. The current membership stands at over 260 with representation of local

Policy Summit, which took place in September 2019. The Asia Organic Youth Forum will be expanded into a "World Organic Youth Forum" in June 2020, and the Asia Organic Innovation Committee launched in December 2019 will carry out research and document best practices in innovations in Asia.

Europe

As of the end of 2018, **15.6 million hectares of agricultural land in Europe** (European Union 13.8 million hectares) were managed organically by over 418'000 producers (European Union: over 327'000). In Europe, 3.1 percent of the agricultural area was organic (European Union: 7.7 percent). Organic farmland has increased by over 1.25 million hectares compared to 2017. The countries with the largest organic agricultural areas were Spain (2.2 million hectares), France (2.0 million hectares), and Italy (2.0 million hectares). In ten countries, at least 10 percent of the farmland is organic: Liechtenstein has the lead (38.5 percent), followed by Austria (24.7 percent) and Estonia (21.6 percent). Retail sales of organic products totalled 40.7 billion euros in 2018 (European Union: 37.4 billion euros), an increase of 7.8 percent since 2017. The largest market for organic products in 2018 was Germany, with retail sales of 10.9 billion euros, followed by France (9.1 billion euros), and Italy (3.5 billion euros) (see the article by Willer et al., page 227). Mainstream retailers generate most organic food sales in Europe (page 218).

In June 2018, the new European Union (EU) Regulation 2018/848 on production and labelling of organic products was published; it will apply from 01 January 2021. The process of developing secondary legislation started in June 2018 and should be concluded at the latest by June 2020, six months before the actual application of the new organic regulation. Furthermore, in June 2018, the European Commission launched its proposal for the Common Agricultural Policy (CAP) from 2021 to 2027. A new feature of the CAP is the proposed eco-schemes, which offer a good opportunity to compensate farmers who want to do more for the climate and the environment. However, according to IFOAM EU, eco-schemes should be better defined in order to favour farming systems that provide multiple objectives including organic farming. On the research side, several major projects focussing on organic agriculture were launched, and the Technology Platform for Organic Food and Farming (TP Organics) finalized its new Strategic Research & Innovation Agenda for Organics & Agroecology (TP Organics 2019). This document serves to relay the research needs of the organic sector to policymakers. The four main research areas (moving organics further, redesign of food and agricultural policies, climate-resilient and diversified farming systems, and sustainable value chains) and 29 identified priorities require support at the EU level. For more information, see article by Willer et al. on page 218.

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governments from 18 countries in Asia and Central Asia.

Latin America and the Caribbean

In Latin America, **almost 228'000 producers managed over 8 million hectares of agricultural land organically in 2018**. This constituted 11 percent of the world's organic land and 1.1 percent of the region's agricultural land. The leading countries were Argentina (3.6 million hectares), Uruguay (2.1 million hectares), and Brazil (1.2 million hectares). The highest shares of organic agricultural land were in Uruguay (14.9 percent), French Guiana (10.1 percent), and the Dominican Republic (7.2 percent). Many Latin American countries remain important exporters of organic products such as coffee, cocoa, and bananas. In Argentina and Uruguay, temperate fruit and meat are key export commodities. Nineteen countries in the region have legislation on organic agriculture, and one country is in the process of drafting legislation. Brazil has the largest market for organic products in Latin America. Similar to Asia, demand is coming from a growing middle class that is seeking healthy, nutritious foods (Sahota, page 138).

Notable developments took place in 2019 in Mexico, Chile, Brazil and Peru. In Mexico, the new National Agroecology Plan aims to establish agroecology as a guiding principle in environmental policies, encompassing production, distribution, processing and consumption. In April 2019, the implementation of the Memorandum of Understanding on Organic Products between Chile and Brazil was announced. This memorandum will promote trade in organic products in both countries through the mutual recognition of their certification and control systems. In Peru, the first edition of the International Food Education Forum was held in November 2019 to promote healthy eating and nutritional education. Peru's enforcement of Law No. 30021 (Law for Promotion of Healthy Eating) aims to promote education policies on healthy food and a national nutrition education program in schools. Through these initiatives, organic and agroecologically-produced food is highlighted. For more information, see the chapter by Flores on page 266.

North America

In North America, **3.3 million hectares of farmland were managed organically in 2018**. Of these, 2 million were in the United States and 1.3 million in Canada, representing 0.8 percent of the total agricultural area in the region (see page 278).

New records were achieved in both the US organic food market and organic non-food market. Organic food sales reached 47.9 billion US dollars,[1] an increase of 5.9 percent compared to 2017. Sales of organic non-food products jumped by 10.6 percent to 4.6 billion US dollars. Almost six percent of the food sold in the United States is now organic. In 2019, the US organic sector moved ahead with an innovative check-off programme for which, in less than a year, organic stakeholders invested 1.5 million US dollars to advance projects focussing on four key actions. Other developments include the National Organic Program's (NOP) expected release of a proposed rule

[1] According to the Central European Bank, 1 euro corresponded to 1.1810 US dollars in 2018.

early in 2020 on "Strengthening Organic Enforcement and Oversight" aiming to strengthen the organic regulations in multiple areas, where increased oversight and enforcement are needed. For more information, see article by Haumann on page 278.

Canada's total organic market (including food and non-food items) reached 6.38 billion Canadian dollars,[1] up from 3.5 billion in 2012, with a compound annual growth rate of 8.7 percent. Statistics indicate the market share of organic food and beverages sold through mainstream retailers has grown from 1.7 to 2.6 percent (2017). The Canadian Organic Standards are in their review process, to be updated as part of its regular 5-year review process. The new standards will be published in November 2020 and will be mandatory as of November 2021. Canada will be reviewing equivalency arrangements in light of these changes as well as the new regulatory framework. For more information, see the chapter by Loftsgard on page 283.

Oceania

This region includes Australia, New Zealand, and the Pacific Island states. Altogether, there were almost 21'000 producers, managing 36.0 million hectares. This constituted 8.6 percent of the agricultural land in the region and half of the world's organic land. **More than 99 percent of the organic land in the region is in Australia** (35.7 million hectares, most of which is extensive grazing land), followed by Samoa (more than 97'000 hectares), and New Zealand (almost 89'000 hectares). The highest organic shares of all national agricultural land were in Samoa (34.5 percent), followed by Vanuatu (13.7 percent), Fiji (9.7 percent), Australia (8.8 percent), Kiribati (4.7 percent), and Solomon Islands (4.4 percent). Four countries in Oceania have legislation on organic agriculture, and twelve countries have a national standard but no organic legislation.

Now estimated to be worth 2.6 billion Australian dollars, the Australian organic industry (exports and retail sales) continued to grow in 2018 despite harsh environmental conditions - with many regions still experiencing significant drought. The growing interest in Australian products from export markets is continuing to forge ahead with the total export volume for 2018 growing by 13 percent since 2017. Over 2018, 30,155 tonnes of organic products were exported to 61 different countries. For more information about Australia, see the report by Kendrick on page 292.

While certification continues to expand across the Pacific and governments are becoming increasingly interested in taking action to create a supportive policy environment, a significant development is that regional and national agencies and development partners are increasingly recognising the value of organic agriculture as a development tool for the Pacific islands context. PGS models in the Pacific include wild harvest, "whole island", as well as more traditional grower groups, and there are currently 11 PGS approved to use the Organic Pasifika Mark. The number and variety

[1] According to the Central European Bank, 1 euro corresponded to 1.5294 Canadian dollars in 2018.

of PGS-certified products on local markets and for export is expanding. Third-party organic certification continues to grow slowly. For some growers of long-term crops such as coconuts, devastation by tropical cyclones makes maintaining certification through the recovery period uneconomical. These issues are likely to be exacerbated under climate change scenarios with more frequent and stronger climate events (see the chapter by Mapusua, page 297).

Outlook

In her outlook, Louise Luttikholt, executive Director of IFOAM – Organics International, explains that UN institutions are increasingly recognising the role of agroecology as a science, a practice, and a social movement that contributes to making agriculture and food systems more sustainable. At the Committee of World Food Security's FAO meeting in October 2019, represented countries expressed overwhelming support for the "Scaling up Agroecology" initiative. IFOAM is honoured to support these conversations through its global campaigns, like "Honest Food" (www.honestfood.bio). By communicating the positive contributions of organic agriculture clearly, we can build new partnerships and together create greater awareness of how organic agriculture is part of the solution. For more information, see the chapter by Luttikholt on page 306.

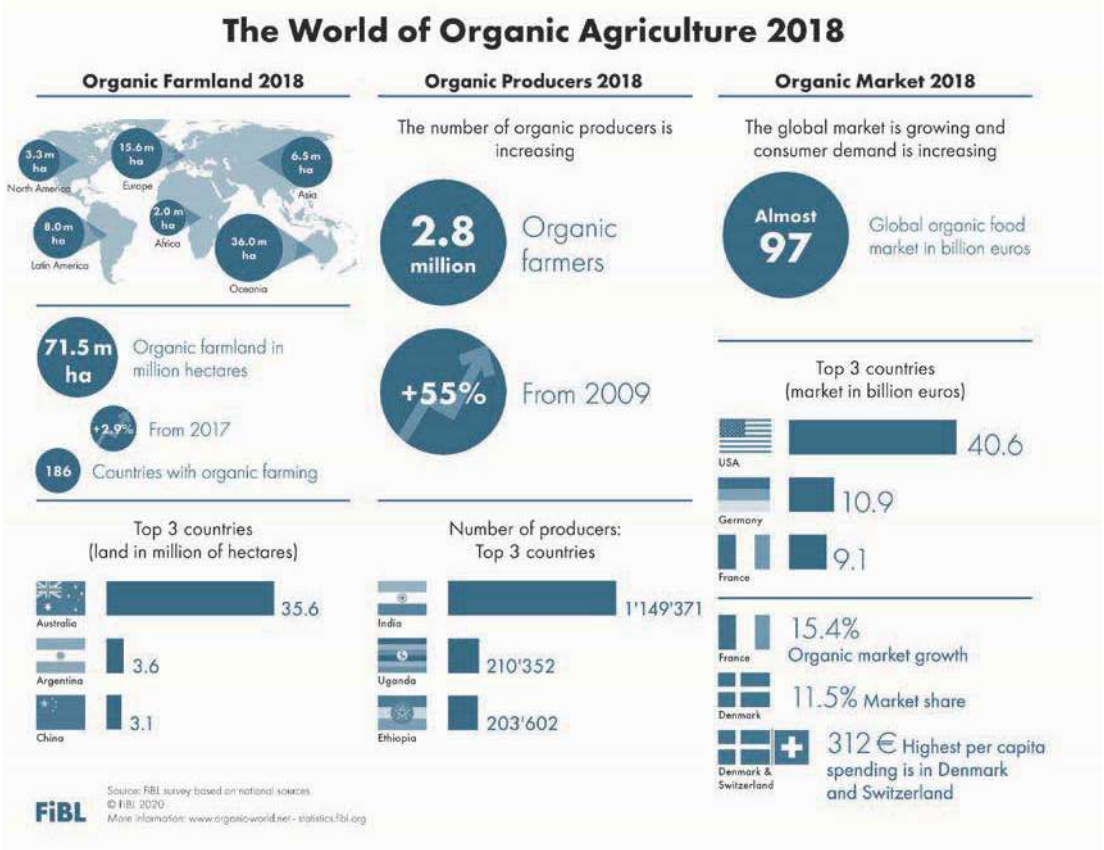
IFOAM Organic World Congress and Statistics preconference

In 2020, the 20th Organic World Congress (OWC) will be held from 21-27 September in Rennes, France. In the days leading up to the congress, delegates have the opportunity to participate in one of eight, topic-specific pre-conferences, one of them focussing on statistics. More information is available at OWC 2020 website https://owc.ifoam.bio/2020/.

Next FiBL survey on organic agriculture worldwide

The next global organic survey will start in mid-2020; data will be published in February 2021 and presented at the Biofach Organic Trade Fair in Nuremberg, Germany. We will contact all relevant experts and would be very grateful if data could be sent to us. 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 2021 edition of "The World of Organic Agriculture." Corrections will also be posted at www.organic-world.net.

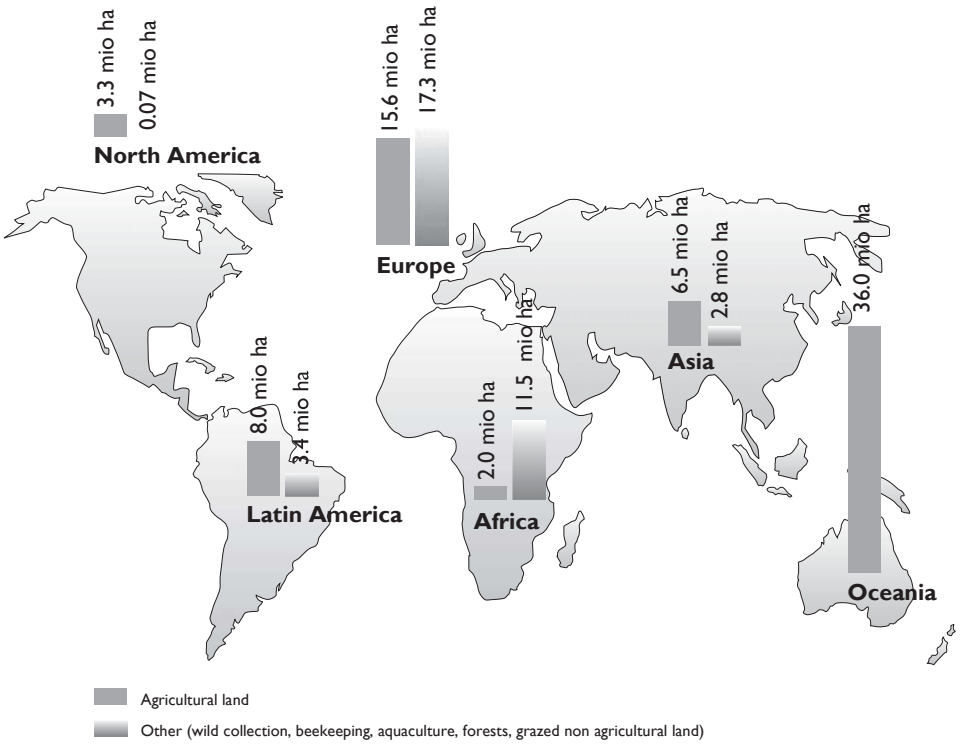
Contact: helga.willer@fibl.org



Infographic 1: Key indicators 2018

Source: FiBL survey 2020

Organic Agriculture Worldwide: Current Statistics



Map 1: Organic agricultural land and non-agricultural areas in 2018 (in hectares)

Source: FiBL survey 2020

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

BERNHARD SCHLATTER[1], JAN TRÁVNÍČEK[2], JULIA LERNOUD[3] AND HELGA WILLER[4]

Introduction

The 21st survey of certified organic agriculture worldwide was carried out by the Research Institute of Organic Agriculture (FiBL) in collaboration with many partners from around the world. The results are published jointly with IFOAM – Organics International. This survey was supported by the Swiss State Secretariat for Economic Affairs (SECO), the International Trade Centre (ITC),[5] the Sustainability Fund of Coop Switzerland,[6] and NürnbergMesse.[7]

Data providers

In total, data were provided by more than 200 experts. Governments, private sector organizations, certifiers, and market research companies have contributed to the data collection effort.

Several international certifiers deserve special mention as they provided data on several countries: BioInspecta, CCPB, CERES, Certisys, Control Union, Ecocert, Ecoglobe, Ekoagros, ICEA, Imocert, Kiwa BCS Oko-Garantie GmbH, LACON, NASAA Certified Organic (NCO), Organic Agriculture Certification Thailand (ACT), Organización Internacional Agropecuaria (OIA), OneCert, and Quality Certification Services (QCS).

A new collaboration with the Inter-American Commission for Organic Agriculture (CIAO) eased data collection in Latin American the Caribbean substantially. Data from the Mediterranean countries were supplied by the Mediterranean Organic Agriculture Network (MOAN, c/o Mediterranean Agronomic Institute of Bari), as it has been for the past decade. Data from the Pacific Islands was provided by the Pacific Organic and Ethical Trade Community (POET.com). Another important source

[1] Bernhard Schlatter, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[2] Jan Trávníček, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[3] Julia Lernoud, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[4] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[5] Since 2014, data collection on organic agriculture worldwide has been funded by the International Trade Centre (ITC) and the Swiss State Secretariat for Economic Affairs (SECO) under the project "T4SD Global Platform for Market Data on Organic Agriculture and Sustainability Standards". For more information on this project, see www.vss.fibl.org
[6] Since 2019, the data collection on organic agriculture has been supported by the Sustainability Fund of Coop Switzerland.
[7] The organisers of BIOFACH, the World Organic Trade Fair in Nuremberg, Germany (today: NürnbergMesse), have supported data collection on organic agriculture worldwide and the production of the yearbook "The World of Organic Agriculture" since 2000.

covering many countries is Eurostat. A list of all data sources and contacts is provided in the annex.

Countries covered

In total, data from 186 countries/territories were available. Gambia, Guinea, Mauritania, and Mayotte are new to the list of countries with organic data. Updated data on the organic area was available for 142 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. For the countries for which FiBL compiles the data among certifiers, not all certifiers provided updated data. When no new data was available, data from the previous survey were used.

Table 1: Countries and territories covered by the global survey on organic agriculture 2018

Region	Countries* with data on organic agriculture	Countries per region[1]	Share of countries that provided data (%)
Africa	47	61	77%
Asia	42	51	82%
Europe	48	51	94%
Latin America and Caribbean	33	48	69%
North America	3	4	75%
Oceania	13	24	54%
World	**186**	**239**	**78%**

Source: FiBL survey 2020
**Where the designation "country" appears in this book, it covers countries or territories.*[2]

Indicators covered

Data on the following indicators were collected: Organic area in hectares including breakdown by crop; livestock numbers; production data (volumes and values); producers and further operator types; domestic market data (total retail sales and food service sales values and volumes, per capita consumption, share of the total market, and breakdown by product); international trade data (total import and export values and volumes, and breakdown by product).

Not all data that was collected is published in this book (e.g., production, livestock numbers, breakdown by product for the domestic market and international trade data) because it was not possible to draw a complete global picture for these indicators. More information about the data collection and analysis process is available in our metadata, which can be found on Organic Eprints (http://orgprints.org/31359).

[1] Number of countries and areas are mostly based on countries as listed in the FAO database at http://www.fao.org/faostat/en/#data/RL as well as some additional countries such as Kosovo.
[2] For more information on countries, territories and regions see the UNSTAT website at http://unstats.un.org/unsd/methods/m49/m49.htm.

Challenges with the 2020 survey

With the 2020 survey we experienced a number of challenges:

- We had data in our database, for which we had not received updates or confirmation for several years. We decided not to continue using this data after a certain point of time (e.g. from 2015 onwards), which resulted in a substantial drop in area and producers for some countries.
- We revised some of the crop data for some countries, as the data seemed implausible.
- We received some major data revisions for some countries, sometimes resulting in a drop of area and producers or change of crop data compared to what we had communicated previously.
- **Special case of Mexico:** There is a challenge with the number of producers in some countries, as some certifiers provide data on all producers including small holders, whereas other certifiers provide data on the certificates only. This problem became particularly marked in the case of Mexico, where the data source changed, and the new source does not include the smallholder farmers, resulting in a major drop of organic producers in Mexico and Latin America as a whole. The change of data source had also an effect on the global number of organic producers: Almost 150'000, or 5.0 percent less producers were recorded compared with 2017. However, in all other continents, with the exception of Africa, the number of producers increased.

More information on statistics.fibl.org

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

Contact: Enquiries related to the data should be sent to Helga Willer, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, e-mail helga.willer@fibl.org.

General notes on the data

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

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

Producer data: Some countries report the number of smallholders while others report only the number of companies, projects, or grower groups, which may each comprise several producers. This applies in particular to many African countries. The number of producers is, therefore, probably higher than the number communicated in this report.

Market data: It should be noted that for market and trade data, comparing country statistics remains very problematic due to differing methods of data collection. Furthermore, for market and trade values fluctuating exchange rates must be kept in mind.

PGS: Since 2011, for some countries, areas certified by Participatory Guarantee Systems (PGS) have been included. (For more information about PGS, see the article by Katto-Andrighetto et al. on page 164).

Country definitions: For countries and territories, the FAO country list is used. Where the designation "country" appears in this report, it covers countries or territories. In most cases, countries are groups by region according to the Standard Country and Area Classifications as defined by the United Nations Statistics Division[1] .

Sources: Data was gathered from private sector organizations, governments, and certification bodies. For detailed information on the data sources, please check the annex at the end of this volume (page 315).

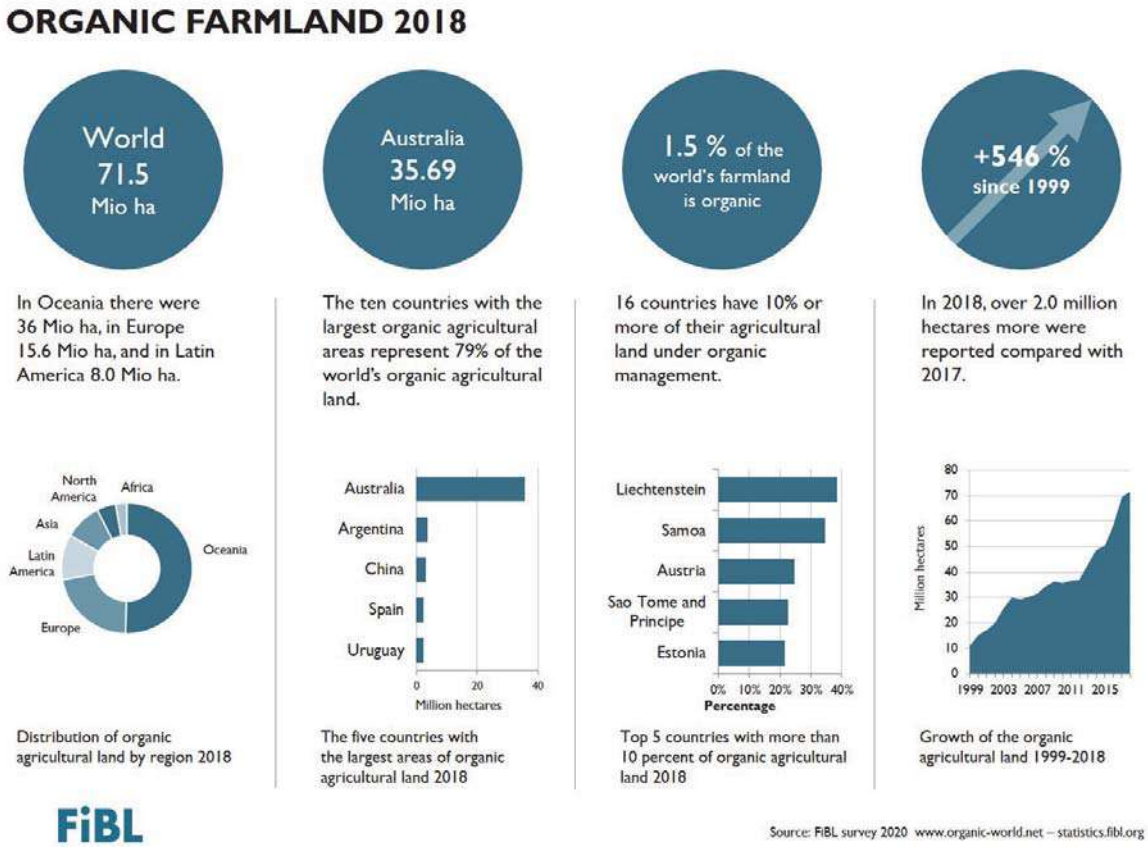
Direct year-to-year comparison: A direct year-to-year comparison is not possible for all data as the data sources may change, data may not be provided on an annual basis, data access may improve, or exchange rates might change.

Completeness of data: For some countries, either no current data were available, or the data provided may not be complete. For others, no data were available. It may, therefore, be assumed that the extent of organic agriculture is larger than documented in this publication.

Data revisions: Data revisions and corrections are communicated at www.organic-world.net/statistics.

Metadata: Metadata for the FiBL survey on organic agriculture worldwide are available on Organic Eprints at http://orgprints.org/31359.

[1] The definition of organic agriculture is available at the website of IFOAM – Organics International www.ifoam.bio/en/organic-landmarks/definition-organic-agriculture



Infographic 2: Organic farmland 2018

Source: FiBL survey 2020

Organic land

Organic agricultural land

In 2018, 71.5 million hectares were under organic agricultural management worldwide.[1]

The region with the most organic agricultural land is Oceania, with 36 million hectares, followed by Europe with 15.6 million hectares, Latin America (8 million hectares), Asia (6.5 million hectares), North America (3.3 million hectares), and Africa (2.0 million hectares).

Oceania has half of the global organic agricultural land. Europe, a region that has had a very constant growth of organic land over the years, has over 22 percent of the world's organic agricultural land followed by Latin America with 11 percent (Table 2, Figure 1).

Australia, which continued to experience growth of its organic area in 2018 (+42'761 hectares), is the country with the most organic agricultural land; it is estimated that 97 percent of the farmland is extensive grazing areas. Argentina is second followed by China in third place (Table 2, Figure 2). The 10 countries with the largest organic agricultural areas have a combined total of 56.2 million hectares and constitute three-quarters of the world's organic agricultural land.

Apart from the organic agricultural land, there are further organic areas such as wild collection areas. These areas constitute more than 35.7 million hectares.

Table 2: World: Organic agricultural land (including in-conversion areas) and regions' shares of the global organic agricultural land 2018

Region	Organic agricultural land [hectares]	Regions' shares of the global organic agricultural land
Africa	2'003'976	3%
Asia	6'537'226	9%
Europe	15'635'505	22%
Latin America	8'008'581	11%
North America	3'335'002	5%
Oceania	35'999'373	50%
World*	**71'514'583**	**100%**

Source: FiBL survey 2020. 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 both for the fully converted and in conversion area are 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.

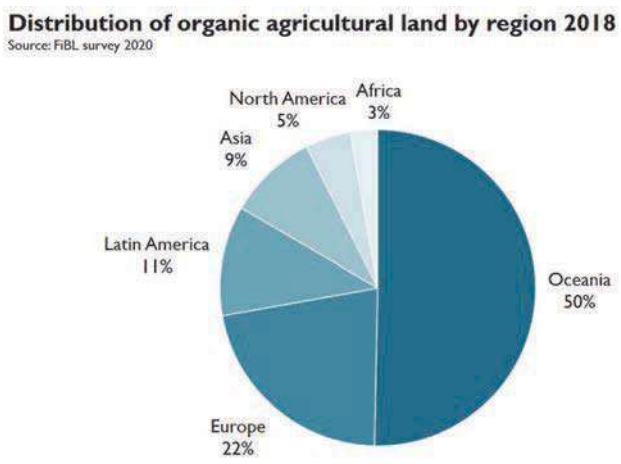


Figure 1: World: Distribution of organic agricultural land by region 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

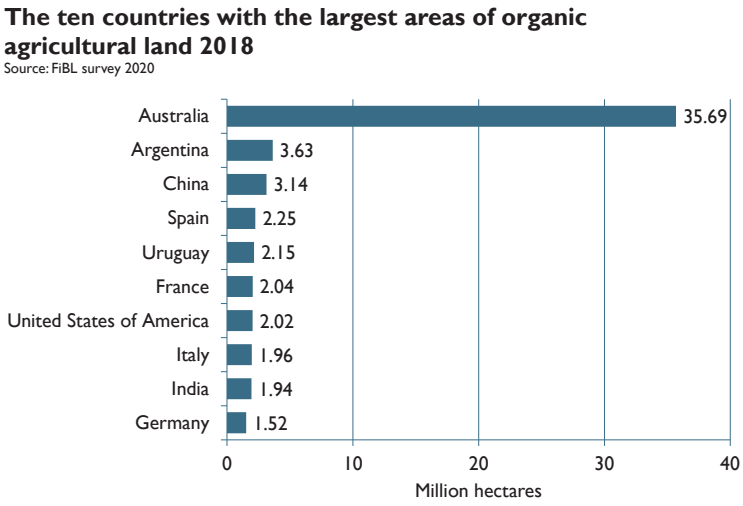


Figure 2: World: The ten countries with the largest areas of organic agricultural land 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Table 3: World: Organic agricultural land (including in-conversion areas) by country 2018 (sorted)

For an alphabetical country list (including information on data year), see page 310.

Country	Hectares
Australia	35'687'799
Argentina	3'629'968
China	3'135'000
Spain	2'246'475
Uruguay	2'147'083
France	2'035'024
United States of America	2'023'430
Italy	1'958'045
India	1'938'221
Germany	1'521'314
Canada	1'311'572
Brazil	1'188'255
Turkey	646'247
Austria	637'805
Sweden	608'758
Russian Federation	606'975
Czech Republic	538'894
Greece	492'627
Poland	484'676
United Kingdom	457'377
Romania	326'260
Peru	311'461
Ukraine	309'100
Tunisia	306'467
Finland	297'442
Latvia	280'383
Tanzania	278'467
Uganda	262'282
Denmark	256'711
Indonesia	251'631
Lithuania	239'691
Viet Nam	237'693
Philippines	218'570
Portugal	213'118
Hungary	209'382
Estonia	206'590
Kazakhstan	192'134
Slovakia	188'986
Ethiopia	186'155
Mexico	183'225
Dominican Republic	169'026
Bulgaria	162'332
Switzerland	160'992
Kenya	154'488
Ireland	118'699

Country	Hectares
Egypt	116'000
Bolivia	114'306
Croatia	103'166
Sierra Leone	99'238
Samoa	97'656
Thailand	95'066
Belgium	89'025
New Zealand	88'871
South Africa	82'818
Sri Lanka	77'169
Sudan	76'941
Pakistan	64'885
Timor-Leste	63'882
Congo, D.R.	60'624
Netherlands	57'904
Nigeria	57'117
Burkina Faso	56'663
Côte d'Ivoire	50'574
Papua New Guinea	49'573
Madagascar	48'757
Slovenia	47'848
Norway	46'377
Paraguay	42'818
Ecuador	41'793
Togo	41'323
Fiji	41'154
Azerbaijan	37'630
Nicaragua	34'787
Falkland Islands (Malvinas)	31'937
Ghana	29'663
Honduras	29'274
Cambodia	27'550
Vanuatu	25'648
Iceland	24'855
Republic of Korea	24'700
Colombia	22'314
Kyrgyzstan	22'118
Syrian Arab Republic	19'987
Serbia	19'255
Saudi Arabia	18'631
Moldova	17'151
Benin	16'454
Chile	16'305
Mozambique	14'933
Guatemala	14'000

Country	Hectares
Mali	12'655
Malawi	12'399
Myanmar	12'305
Iran (Islamic Republic of)	11'916
Nepal	11'851
Sao Tome and Principe	10'934
Japan	10'792
Morocco	9'917
Malaysia	9'576
Costa Rica	8'964
Tajikistan	8'806
Taiwan	8'759
Senegal	7'989
Lao P.D.R.	7'668
Israel	6'666
Bhutan	6'632
Cuba	6'181
Cyprus	6'022
Panama	5'929
Luxembourg	5'782
Palestine	4'870
Solomon Islands	4'714
United Arab Emirates	4'687
Montenegro	4'455
North Macedonia	4'409
Haiti	4'403
French Guiana (France)	3'103
Comoros	2'142
Rwanda	2'130
El Salvador	1'679
Belarus	1'656
Kiribati	1'600
French Polynesia	1'512
Georgia	1'452
Jordan	1'446
Liechtenstein	1'413
Réunion (France)	1'272
Lebanon	1'241
Zambia	1'228
Cameroon	1'089
Uzbekistan	943
Bosnia and Herzegovina	896
Guinea-Bissau	835
Afghanistan	786
Algeria	772
Albania	747
Armenia	694
Tonga	685
Mongolia	636
Bangladesh	504

Country	Hectares
Cape Verde	495
Zimbabwe	415
Martinique (France)	398
Jamaica	374
Guadeloupe (France)	272
Niger	254
Faroe Islands	251
Dominica	240
Belize	220
Eswatini	186
Channel Islands	180
Burundi	164
Kosovo	160
New Caledonia	94
Suriname	94
Grenada	84
Namibia	66
Iraq	63
Bahamas	49
Malta	47
Niue	43
Oman	43
Mayotte	35
US Virgin Islands	26
Cook Islands	24
Kuwait	22
Gambia	20
Puerto Rico	14
Guinea	10
Singapore	3
Mauritius	3
Andorra	2
Liberia	2
Lesotho	1
Bermuda (Processing)	
Brunei Darussalam (Aquaculture)	
Chad (Wild collection)	
Guyana (Wild collection)	
Hong Kong (Processing)	
Mauritania (Wild collection)	
Monaco (Processing)	
San Marino (Processing)	
Somalia (Wild collection)	
Venezuela (Processing)	
World*	**71'514'583**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315
**Total includes correction value for French overseas departments*

Organic share of total agricultural land

The share of the world's agricultural land that is organic is 1.5 percent.

The highest organic share of total agricultural land, by region, is in Oceania (8.6 percent) followed by Europe with 3.1 percent and Latin America with 1.1 percent. In the European Union, the organic share of the total agricultural land is 7.7 percent. In the other regions, the share is less than one percent (Table 4).

Many individual countries, however, have a much higher organic share (Figure 3), and, in 16 countries, 10 percent or more of the agricultural land is used for organic production. Most of these countries are in Europe. The country with the highest organic share is Liechtenstein, with more than 38 percent of its agricultural land under organic management. It is interesting to note that many island states have high shares of agricultural land under organic management, such as Samoa and Sao Tome and Principe.

However, 57 percent of the countries for which data is available have less than one percent of their agricultural land under organic management (Figure 4).

Table 4: World: Organic agricultural land (including in-conversion areas) and organic share of total agricultural land by region 2018

Region	Organic agr. land [ha]	Share of total agri. land
Africa	2'003'976	0.2%
Asia	6'537'226	0.4%
Europe	15'635'505	3.1%
Latin America	8'008'581	1.1%
North America	3'335'002	0.8%
Oceania	35'999'373	8.6%
World*	**71'514'583**	**1.5%**

Source: FiBL survey 2020.
** Total includes correction value for French overseas departments.*

To calculate the percentages, the data on the total agricultural land for most countries was taken from FAO's Statistical database on the FAOSTAT website.[1] For the European Union, most data were obtained from Eurostat. Where available, data from national sources were used for the total agricultural land (for instance, Austria, Switzerland, and the United States), which sometimes differs from that published by Eurostat or FAOSTAT.
Please note that the calculation of the organic shares based on Eurostat and FAOSTAT data may differ in some cases from the data published by ministries and experts.

[1] FAOSTAT, the FAO Homepage, FAO, Rome at faostat3.fao.org > Agri-Environmental Indicators > Download http://www.fao.org/faostat/en/#data/RL

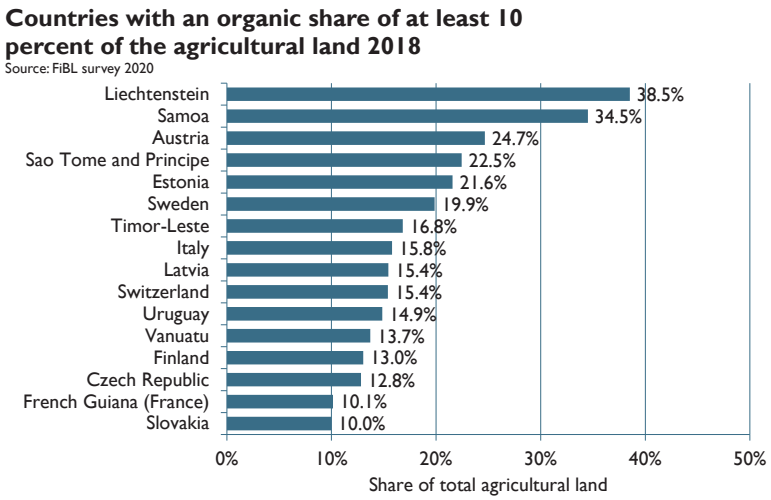


Figure 3: World: Countries with an organic share of the total agricultural land of at least 10 percent 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. Calculation of organic shares based on FAOSTAT, Eurostat, and national sources. For detailed data sources see annex, page 315

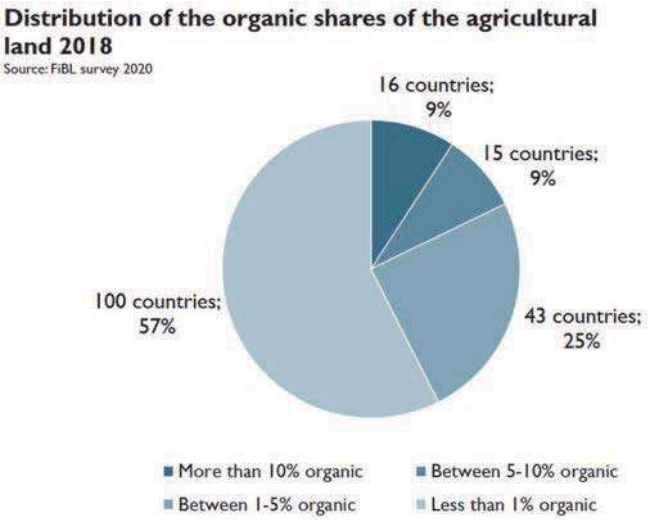


Figure 4: World: Distribution of the organic shares of the agricultural land 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. Calculation of organic shares based on FAOSTAT, Eurostat, and national sources. For detailed data sources see annex, page 315

Table 5: World: Organic shares of total agricultural land by country 2018 (sorted)

For an alphabetical country list (including information on data year), see page 310.

Country	Organic share
Liechtenstein	38.5%
Samoa	34.5%
Austria	24.7%
Sao Tome and Principe	22.5%
Estonia	21.6%
Sweden	19.9%
Timor-Leste	16.8%
Italy	15.8%
Latvia	15.4%
Switzerland	15.4%
Uruguay	14.9%
Vanuatu	13.7%
Finland	13.0%
Czech Republic	12.8%
French Guiana (France)	10.1%
Slovakia	10.0%
Slovenia	9.9%
Denmark	9.8%
Fiji	9.7%
Spain	9.6%
Germany	9.1%
Australia	8.8%
Faroe Islands	8.4%
Lithuania	8.3%
France	7.3%
Dominican Republic	7.2%
Belgium	6.8%
Croatia	6.6%
Greece	6.0%
Portugal	5.9%
Cyprus	5.4%
Kiribati	4.7%
Norway	4.7%
Hungary	4.5%
Luxembourg	4.4%
Solomon Islands	4.4%
Papua New Guinea	4.2%
Bulgaria	3.5%
Poland	3.4%
French Polynesia	3.3%
Netherlands	3.1%
Egypt	3.1%
Tunisia	3.0%
Falkland Islands (Malvinas)	2.9%
Sri Lanka	2.8%
United Kingdom	2.7%
Réunion (France)	2.6%

Country	Organic share
Sierra Leone	2.5%
Romania	2.5%
Argentina	2.4%
Ireland	2.4%
Viet Nam	2.2%
Tonga	2.1%
Canada	2.0%
Montenegro	1.9%
Channel Islands	1.9%
Uganda	1.8%
Philippines	1.8%
Turkey	1.7%
Palestine	1.6%
Comoros	1.6%
Cook Islands	1.6%
Republic of Korea	1.4%
Iceland	1.3%
Peru	1.3%
Bhutan	1.3%
Martinique (France)	1.3%
Israel	1.2%
United Arab Emirates	1.2%
Taiwan	1.1%
Togo	1.1%
India	1.1%
Dominica	1.0%
Honduras	0.9%
Niue	0.9%
New Zealand	0.8%
Azerbaijan	0.8%
Ecuador	0.7%
Ukraine	0.7%
Tanzania	0.7%
Moldova	0.7%
Nicaragua	0.7%
US Virgin Islands	0.7%
China	0.6%
United States of America	0.6%
Cape Verde	0.6%
Kenya	0.6%
Serbia	0.5%
Guadeloupe (France)	0.5%
Ethiopia	0.5%
Cambodia	0.5%
Costa Rica	0.5%
Burkina Faso	0.5%
Malta	0.5%

Country	Organic share
Indonesia	0.4%
Benin	0.4%
Thailand	0.4%
Brazil	0.4%
Singapore	0.4%
Guatemala	0.4%
North Macedonia	0.3%
Bahamas	0.3%
Lao P.D.R.	0.3%
Bolivia	0.3%
Mayotte	0.3%
Russian Federation	0.3%
Panama	0.3%
Haiti	0.2%
Japan	0.2%
Congo, D.R.	0.2%
Malawi	0.2%
Kyrgyzstan	0.2%
Paraguay	0.2%
Ghana	0.2%
Lebanon	0.2%
Tajikistan	0.2%
Pakistan	0.2%
Mexico	0.2%
Syrian Arab Republic	0.1%
Belize	0.1%
Jordan	0.1%
Malaysia	0.1%
Madagascar	0.1%
Rwanda	0.1%
Sudan	0.1%
Suriname	0.1%
El Salvador	0.1%
Chile	0.1%
Cuba	0.1%
Myanmar	0.1%
Kazakhstan	0.1%
Senegal	0.1%
Jamaica	0.1%
Nigeria	0.1%
Albania	0.1%
Côte d'Ivoire	0.1%
Georgia	0.1%
Guinea-Bissau	0.1%
New Caledonia	0.1%
Colombia	0.05%
Kosovo	0.04%
Bosnia and Herzegovina	0.04%
Armenia	0.04%

Country	Organic share
Morocco	0.03%
Mali	0.03%
Mozambique	0.03%
Iran (Islamic Republic of)	0.03%
Belarus	0.02%
Eswatini	0.02%
South Africa	0.01%
Kuwait	0.01%
Cameroon	0.01%
Saudi Arabia	0.01%
Andorra	0.01%
Burundi	0.01%
Puerto Rico	0.01%
Bangladesh	0.01%
Zambia	0.01%
Uzbekistan	0.004%
Gambia	0.003%
Mauritius	0.003%
Oman	0.003%
Zimbabwe	0.003%
Afghanistan	0.002%
Algeria	0.002%
Iraq	0.001%
Niger	0.001%
Mongolia	0.001%
Nepal	0.0004%
Namibia	0.0002%
Liberia	0.0001%
Guinea	0.0001%
Lesotho	0.00004%
Bermuda (Processing)	
Brunei Darussalam (Aquaculture)	
Chad (Wild collection)	
Guyana (Wild collection)	
Hong Kong (Processing)	
Mauritania (Wild collection)	
Monaco (Processing)	
San Marino (Processing)	
Somalia (Wild collection)	
Venezuela (Processing)	
World	**1.5%**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. Calculation of organic shares based on FAOSTAT, Eurostat, and national sources. For detailed data sources see annex, page 315

Growth of the organic agricultural land

Compared with 1999, when 11 million hectares were organic, organic agricultural land has increased more than six-fold (Figure 5). In 2018, 2.02 million hectares, or 2.9 percent, more were reported compared with 2017. Many countries reported a significant increase, for instance France (16.7 percent increase; over 0.29 million hectares more) and Uruguay (14.1 percent increase; almost 0.26 million hectares more). In addition, Argentina (7.2 percent increase; almost 0.24 million hectares more) and Viet Nam (almost 0.18 million hectares more) reported significant increases (Table 6, Figure 7).

In 2018, the area of organic agricultural land increased in all regions (Table 6, Figure 6). The highest absolute growth was in Europe (+8.7 percent, +1.25 million hectares), followed by Asia (+8.9 percent, +0.54 million hectares) and North America (+3.5 percent, +0.11 million hectares).

Ninety-eight countries experienced an increase in the area of their organic agricultural land, while a decrease was reported in 39 countries. In 41 countries, the organic agricultural area either did not change, or no new data was received.

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

Table 6: World: Organic agricultural land (including in-conversion areas) by region: growth 2017-2018 and 10 years growth

Region	Organic agr. land 2017 [ha]	Organic agr. land 2018 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
Africa	1'999'846	2'003'976	+4'130	+0.2%	+1'003'847	+100.4%
Asia	6'002'017	6'537'226	+535'209	+8.9%	+2'956'766	+82.6%
Europe	14'382'480	15'635'505	+1'253'025	+8.7%	+6'406'273	+69.4%
Latin America	7'995'447	8'008'581	+13'134	+0.2%	+348'989	+4.6%
North America	3'223'057	3'335'002	+111'945	+3.5%	+682'377	+25.7%
Oceania	35'894'365	35'999'373	+105'008	+0.3%	+23'847'268	+196.2%
World*	**69'492'495**	**71'514'583**	**+2'022'327**	**+2.9%**	**+35'243'503**	**+97.2%**

Source: FiBL survey 2020, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 315

** Total includes correction value for French Overseas Departments.*

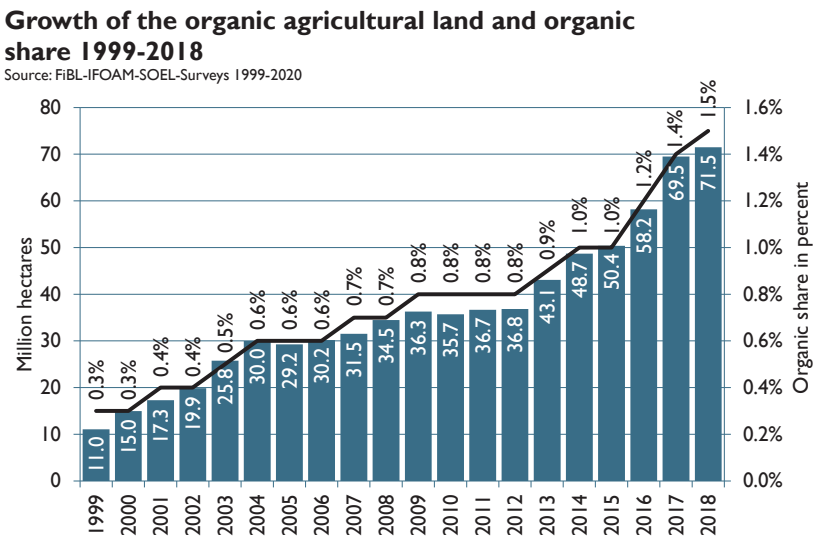


Figure 5: World: Growth of the organic agricultural land and organic share 1999-2018

Source: FiBL-IFOAM-SOEL surveys 2001-2020

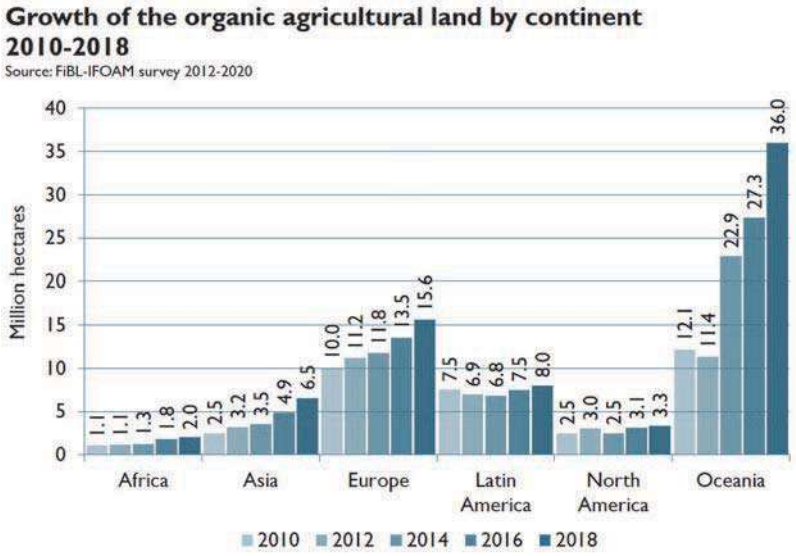


Figure 6: World: Growth of the organic agricultural land by continent 2010 to 2018

Source: FiBL-IFOAM-SOEL surveys 2012-2020

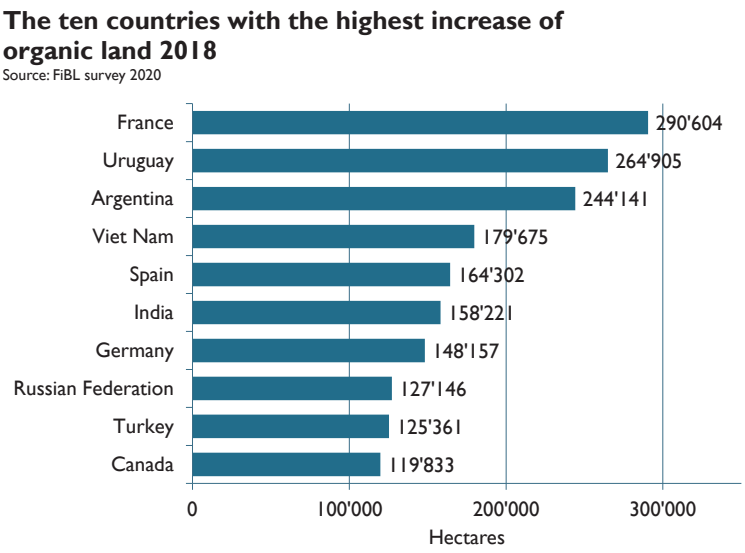


Figure 7: World: The ten countries with the highest increase of organic agricultural land 2018

Source: FiBL survey 2020, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 315

Table 7: World: Development of organic agricultural land by country 2017-2018

Important note: A direct year-to-year and 10 years 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 for the previous year is used (see also page 315). At statistics.fibl.org data back to 2000 is available.[1]

Country	Organic agr. land 2017 [ha]	Organic agr. land 2018 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
Afghanistan	272	786	514	189.1%	723	1147.6%
Albania	549	747	198	36.0%	476	175.5%
Algeria	772	772	-	-	150	24.1%
Andorra	2	2	-	-	-	-
Angola	-	-	-	-	-2'486	-
Argentina	3'385'827	3'629'968	244'141	7.2%	-697'404	-16.1%
Armenia	1'430	694	-736	-51.5%	94	15.6%
Australia	35'645'038	35'687'799	42'761	0.1%	23'686'075	197.4%
Austria	620'764	637'805	17'041	2.7%	91'447	16.7%
Azerbaijan	37'630	37'630	-	-	17'292	85.0%
Bahamas	49	49	-	-	49	-
Bangladesh	1'746	504	-1'242	-71.1%	-658	-56.6%
Belarus	1'338	1'656	317	23.7%	1'656	-
Belgium	83'510	89'025	5'515	6.6%	47'566	114.7%

[1] The data is available at http://www.organic-world.net/statistics/statistics-data-tables.html.

Country	Organic agr. land 2017 [ha]	Organic agr. land 2018 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
Belize	380	220	-160	-42.2%	-257	-53.9%
Benin	18'928	16'454	-2'474	-13.1%	15'582	1786.9%
Bermuda	Processing					
Bhutan	6'632	6'632	-	-	6'632	-
Bolivia	114'306	114'306	-	-	73'302	178.8%
Bosnia and Herzegovina	1'273	896	-376	-29.6%	316	54.6%
Brazil	1'136'857	1'188'255	51'398	4.5%	256'135	27.5%
Brunei Darussalam	Aquaculture					
Bulgaria	136'629	162'332	25'703	18.8%	150'012	1217.6%
Burkina Faso	58'891	56'663	-2'228	-3.8%	41'970	285.6%
Burundi	83	164	81	97.6%	-186	-53.2%
Cambodia	11'042	27'550	16'508	149.5%	16'826	156.9%
Cameroon	1'089	1'089	-	-	797	272.8%
Canada	1'191'739	1'311'572	119'833	10.1%	607'894	86.4%
Cape Verde	495	495	-	-0.1%	495	-
Chad	Wild collection					
Channel Islands	180	180	-	-	-190	-51.4%
Chile	19'415	16'305	-3'110	-16.0%	-66'022	-80.2%
China	3'023'000	3'135'000	112'000	3.7%	1'282'000	69.2%
Colombia	25'560	22'314	-3'246	-12.7%	-25'462	-53.3%
Comoros	1'445	2'142	697	48.3%	812	61.1%
Cook Islands	25	24	-1	-4.0%	24	-
Costa Rica	8'736	8'964	228	2.6%	912	11.3%
Côte d'Ivoire	50'446	50'574	128	0.3%	33'131	189.9%
Croatia	96'618	103'166	6'548	6.8%	88'972	626.8%
Cuba	6'186	6'181	-5	-0.1%	-8'133	-56.8%
Cyprus	5'616	6'022	407	7.2%	2'447	68.5%
Czech Republic	520'032	538'894	18'861	3.6%	140'487	35.3%
Congo, D.R.	60'624	60'624	-	-	53'957	809.3%
Denmark	226'307	256'711	30'404	13.4%	100'278	64.1%
Dominica	-	240	240	-	240	-
Dominican Republic	205'258	169'026	-36'232	-17.7%	7'928	4.9%
Ecuador	41'793	41'793	-	-	-27'565	-39.7%
Egypt	105'908	116'000	10'092	9.5%	60'000	107.1%
El Salvador	1'677	1'679	2	0.1%	-5'058	-75.1%
Estonia	196'441	206'590	10'149	5.2%	111'423	117.1%
Eswatini	186	186	-	0.0%	140	305.5%
Ethiopia	186'155	186'155	-	0.0%	86'211	86.3%
Falkland Islands (Malvinas)	31'937	31'937	-	0.0%	-363'998	-91.9%
Faroe Islands	253	251	-2	-0.8%	239	1992.9%
Fiji	16'604	41'154	24'550	147.9%	41'054	41054.1%
Finland	259'451	297'442	37'991	14.6%	131'271	79.0%
France	1'744'420	2'035'024	290'604	16.7%	1'357'511	200.4%

Country	Organic agr. land 2017 [ha]	Organic agr. land 2018 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
French Guiana (FR)	3'061	3'103	42	1.4%	452	17.1%
French Polynesia	1'491	1'512	21	1.4%	1'512	-
Gambia	20	20	-	-	20	-
Georgia	1'452	1'452	-	-	244	20.2%
Germany	1'373'157	1'521'314	148'157	10.8%	574'199	60.6%
Ghana	15'278	29'663	14'385	94.2%	523	1.8%
Greece	410'140	492'627	82'487	20.1%	166'375	51.0%
Grenada	85	84	-1	-1.7%	44	110.0%
Guadeloupe (France)	200	272	72	36.1%	188	223.8%
Guatemala	14'000	14'000	-	-	700	5.3%
Guinea	10	10	-	-	10	-
Guinea-Bissau	835	835	-	-	835	-
Guyana		Wild collection	-	-	-4'249	-
Haiti	5'586	4'403	-1'182	-21.2%	4'349	8054.4%
Honduras	29'274	29'274	0	0.0%	17'473	148.1%
Hong Kong	Processing					
Hungary	199'684	209'382	9'698	4.9%	69'090	49.2%
Iceland	20'177	24'855	4'679	23.2%	18'194	273.1%
India	1'780'000	1'938'221	158'221	8.9%	758'221	64.3%
Indonesia	208'042	251'631	43'589	21.0%	192'490	325.5%
Iran	11'916	11'916	-	-0.0002%	3'063	34.6%
Iraq	60	63	3	4.2%	63	-
Ireland	74'336	118'699	44'363	59.7%	70'835	148.0%
Israel	6'568	6'666	98	1.5%	-303	-4.4%
Italy	1'908'653	1'958'045	49'392	2.6%	851'362	76.9%
Jamaica	374	374	-	-	-168	-31.0%
Japan	9'956	10'792	836	8.4%	1'725	19.0%
Jordan	1'446	1'446	-	-	393	37.4%
Kazakhstan	256'741	192'134	-64'607	-25.2%	57'272	42.5%
Kenya	172'225	154'488	-17'737	-10.3%	150'261	3554.5%
Kiribati	1'600	1'600	-	-	1'600	-
Kosovo	160	160	-	-	160	-
Kuwait	20	22	1	6.9%	22	-
Kyrgyzstan	19'327	22'118	2'791	14.4%	10'703	93.8%
Lao P.D.R	7'668	7'668	-	-	2'424	46.2%
Latvia	268'870	280'383	11'513	4.3%	120'208	75.0%
Lebanon	1'353	1'241	-112	-8.3%	-2'091	-62.7%
Lesotho		Wild collection	1	-	-329	-99.7%
Liberia	-	2	2	-	2	-
Liechtenstein	1'389	1'413	24	1.7%	408	40.6%
Lithuania	234'134	239'691	5'557	2.4%	110'636	85.7%
Luxembourg	5'444	5'782	338	6.2%	2'168	60.0%
Madagascar	63'954	48'757	-15'197	-23.8%	34'688	246.6%
Malawi	12'232	12'399	167	1.4%	11'405	1146.9%
Malaysia	603	9'576	8'973	1488.0%	7'994	505.4%
Mali	12'655	12'655	-	-	-9'026	-41.6%

Country	Organic agr. land 2017 [ha]	Organic agr. land 2018 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
Malta	43	47	4	8.9%	21	81.6%
Martinique (FR)	364	398	34	9.3%	258	184.3%
Mauritania	Wild collection					
Mauritius	14	3	-11	-81.5%	-4	-60.0%
Mayotte	41	35	-6	-14.5%	35	-
Mexico	673'968	183'225	-490'743	-72.8%	-149'260	-44.9%
Moldova	30'142	17'151	-12'990	-43.1%	-14'954	-46.6%
Monaco	Processing					
Mongolia		636	636	-	636	-
Montenegro	2'715	4'455	1'739	64.1%	-148	-3.2%
Morocco	9'175	9'917	742	8.1%	6'117	161.0%
Mozambique	12'586	14'933	2'347	18.6%	13'378	860.0%
Myanmar	10'248	12'305	2'057	20.1%	11'750	2117.2%
Namibia	50	66	17	33.3%	-58	-46.8%
Nepal	9'361	11'851	2'491	26.6%	3'793	47.1%
Netherlands	56'203	57'904	1'701	3.0%	5'993	11.5%
New Caledonia	94	94	-	-	94	-
New Zealand	88'871	88'871	-	-	-35'593	-28.6%
Nicaragua	33'621	34'787	1'166	3.5%	1'166	3.5%
Niger	254	254	-	-	-101	-28.5%
Nigeria	53'402	57'117	3'715	7.0%	48'915	596.4%
Niue	165	43	-122	-73.8%	-116	-72.8%
North Macedonia	2'900	4'409	1'509	52.0%	3'035	220.9%
Norway	47'042	46'377	-665	-1.4%	-10'360	-18.3%
Oman	38	43	4	11.5%	3	8.6%
Pakistan	51'304	64'885	13'581	26.5%	44'564	219.3%
Palestine	5'298	4'870	-428	-8.1%	3'870	387.0%
Panama	15'183	5'929	-9'254	-60.9%	685	13.1%
Papua New Guinea	13'675	49'573	35'899	262.5%	46'252	1392.7%
Paraguay	43'711	42'818	-893	-2.0%	-8'372	-16.4%
Peru	315'525	311'461	-4'064	-1.3%	125'147	67.2%
Philippines	187'047	218'570	31'523	16.9%	166'764	321.9%
Poland	494'979	484'676	-10'303	-2.1%	117'614	32.0%
Portugal	253'786	213'118	-40'668	-16.0%	61'658	40.7%
Puerto Rico	14	14	-	-	14	-
Republic of Korea	20'700	24'700	4'000	19.3%	11'357	85.1%
Réunion (FR)	1'051	1'272	221	21.1%	1'084	576.6%
Romania	258'471	326'260	67'789	26.2%	157'972	93.9%
Russian Federation	479'829	606'975	127'146	26.5%	528'526	673.7%
Rwanda	1'276	2'130	854	67.0%	-1'567	-42.4%
Samoa	106'406	97'656	-8'750	-8.2%	87'942	905.3%
San Marino	Processing					
Sao Tome and Principe	8'780	10'934	2'154	24.5%	7'343	204.5%

Country	Organic agr. land 2017 [ha]	Organic agr. land 2018 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
Saudi Arabia	17'075	18'631	1'556	9.1%	-28'004	-60.0%
Senegal	7'805	7'989	184	2.4%	-17'362	-68.5%
Serbia	13'423	19'255	5'831	43.4%	10'594	122.3%
Sierra Leone	101'184	99'238	-1'946	-1.9%	26'766	36.9%
Singapore		3	3	-	3	-
Slovakia	189'148	188'986	-162	-0.1%	43'496	29.9%
Slovenia	46'222	47'848	1'626	3.5%	18'460	62.8%
Solomon Islands	3'927	4'714	787	20.0%	1'086	29.9%
Somalia	Wild collection					
South Africa	22'646	82'818	60'172	265.7%	23'270	39.1%
Spain	2'082'173	2'246'475	164'302	7.9%	915'701	68.8%
Sri Lanka	96'318	77'169	-19'149	-19.9%	56'013	264.8%
Sudan	130'050	76'941	-53'109	-40.8%	-857	-1.1%
Suriname	57	94	36	63.4%	86	1069.4%
Sweden	576'845	608'758	31'913	5.5%	217'234	55.5%
Switzerland	151'404	160'992	9'588	6.3%	48'910	43.6%
Syrian Arab Republic	19'987	19'987	-	-	-15'452	-43.6%
Taiwan	7'569	8'759	1'190	15.7%	5'798	195.8%
Tajikistan	4'920	8'806	3'886	79.0%	8'737	-
Tanzania	278'467	278'467	-	-	206'279	285.8%
Thailand	91'266	95'066	3'800	4.2%	64'311	209.1%
Timor-Leste	31'278	63'882	32'604	104.2%	38'885	155.6%
Togo	41'323	41'323	-	-	39'534	2210.3%
Tonga	1'588	685	-904	-56.9%	685	-
Tunisia	306'467	306'467	-	-	139'165	83.2%
Turkey	520'886	646'247	125'361	24.1%	320'416	98.3%
Uganda	262'282	262'282	-	-	35'328	15.6%
Ukraine	289'000	309'100	20'100	7.0%	38'907	14.4%
United Arab Emirates	4'687	4'687	-	-	4'314	1156.2%
United Kingdom	497'742	457'377	-40'365	-8.1%	-264'349	-36.6%
United States of America	2'031'318	2'023'430	-7'888	-0.4%	74'484	3.8%
US Virgin Islands	26	26	-	-	26	-
Uruguay	1'882'178	2'147'083	264'905	14.1%	1'216'118	130.6%
Uzbekistan	-	943	943	-	619	191.0%
Vanuatu	14'881	25'648	10'767	72.4%	16'652	185.1%
Venezuela	Processing					
Viet Nam	58'018	237'693	179'675	309.7%	223'681	1596.4%
Zambia	445	1'228	783	176.0%	-2'374	-65.9%
Zimbabwe	320	415	95	29.7%	-6	-1.3%
World*	**69'492'256**	**71'514'583**	**2'022'327**	**2.9%**	**35'243'503**	**97.2%**

Source: FiBL survey 2020, 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 315
**Total includes correction value for French overseas departments.*

Further organic areas

Apart from land dedicated to organic agriculture, there are further areas of organic land dedicated to other activities. The largest part of these are wild collection areas and areas for beekeeping. Further non-agricultural areas include aquaculture, forests, and grazing areas on non-agricultural land. These areas totalled 35.7 million hectares, and all the organic areas together summed up to 107.3 million hectares.

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

For organic aquaculture and beekeeping, other indicators (production and number of beehives) are more relevant than the area, and the significance of organic aquaculture and beekeeping cannot be measured in hectares. In Table 8 and Table 9, some area data on aquaculture can be found, but it should be noted that it is not complete.

For more information on aquaculture and beekeeping, see pages 89 and 86. More information on the use of the wild collection areas is available in the corresponding chapter, page 81.

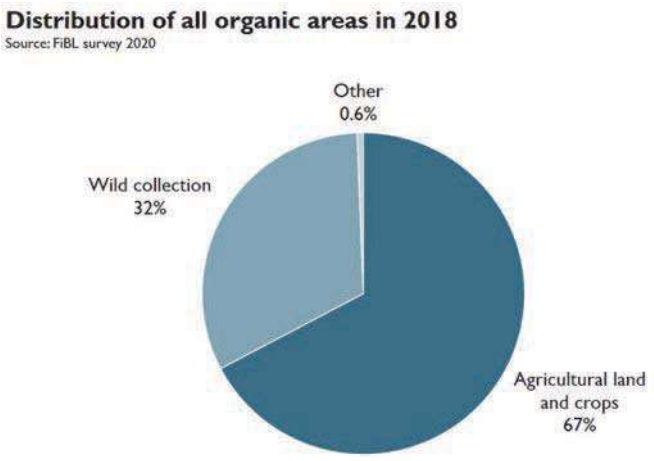


Figure 8: World: Distribution of all organic areas 2018. Total: 107.3 million hectares

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Table 8: World: Organic areas: Agricultural land (including conversion areas) and further organic areas by region in 2018

Region	Agricul-ture [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agri. land [ha]	Wild collection [ha]*	Other non agri. land [ha]	Total [ha]
Africa	2'003'977	3'600	71'984	27'605	11'529'725	107	13'636'998
Asia	6'537'226	206'218	123	20'000	2'835'448	19'373	9'618'388
Europe	15'635'505		19'750		17'246'818		32'902'070
Latin America	8'008'581	83	40'007		3'444'450	23'090	11'516'211
North America	3'335'002		205'196		6'981	21'487	3'568'665
Oceania	35'999'373				765		36'000'138
World**	**71'514'583**	**209'900**	**337'060**	**47'605**	**35'064'187**	**64'057**	**107'237'391**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315
Blank cells: No data available.
**Wild collection and beekeeping areas*
***Total includes correction value for French overseas departments.*

Table 9: World: Organic areas: Agricultural land (including conversion areas) and further organic areas by country 2018

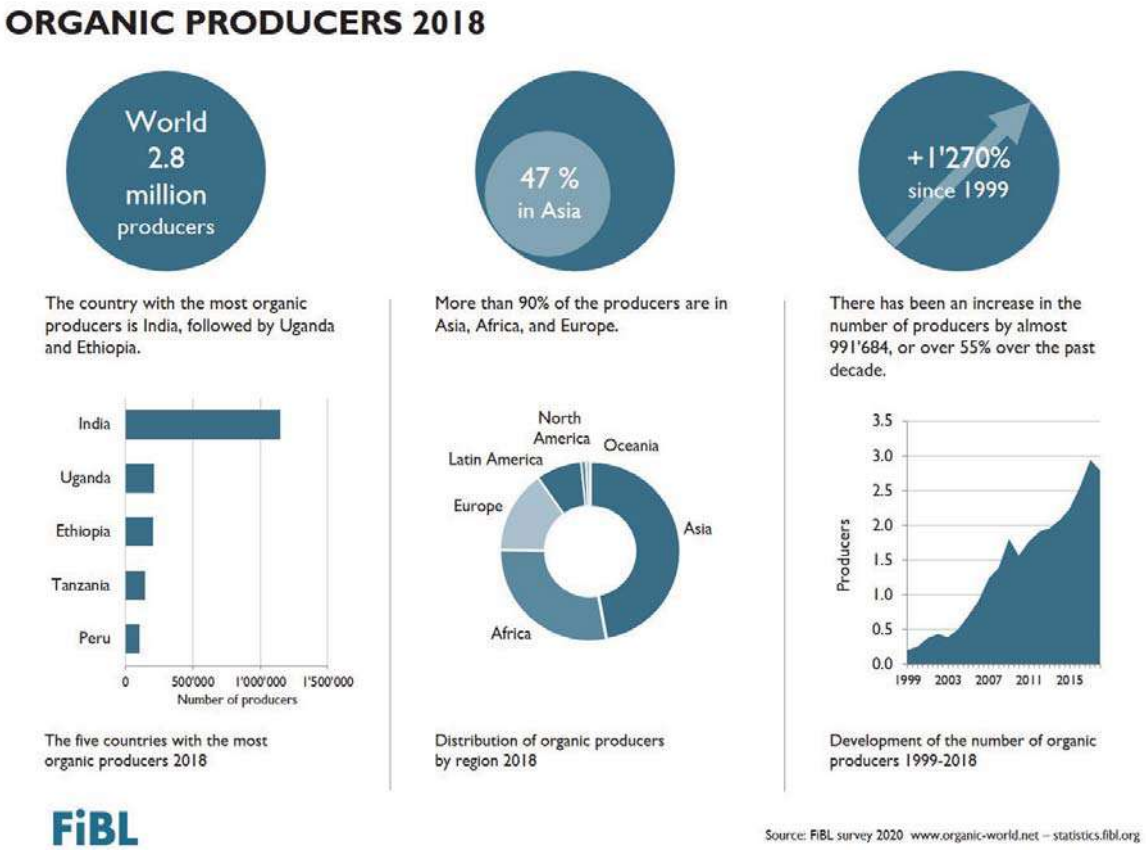
Country	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agri. land [ha]	Wild collection [ha]*	Other non agri. land [ha]	Total [ha]
Afghanistan	786						786
Albania	747				613'893		614'640
Algeria	772				628		1'400
Andorra	2						2
Argentina	3'629'968				1'001		3'630'969
Armenia	694				9'310		10'004
Australia	35'687'799						35'687'799
Austria	637'805		217		1		638'023
Azerbaijan	37'630	123	123		1'063		38'939
Bahamas	49						49
Bangladesh	504	5'781					6'285
Belarus	1'655				577'019		578'674
Belgium	89'025				3		89'028
Belize	220						220
Benin	16'454				3'700		20'154
Bhutan	6'632				7'746		14'378
Bolivia	114'306				922'991		1'037'297
Bosnia and Herzegovina	896				165'534		166'430
Botswana					102'502		102'502
Brazil	1'188'255				1'229'445		2'417'700
Brunei Darussalam		29					29
Bulgaria	162'332				307'020		469'352
Burkina Faso	56'663				231'765		288'428
Burundi	164						164
Cambodia	27'550						27'550
Cameroon	1'089				47'000		48'089
Canada	1'311'572				6'643	21'487	1'339'701
Cape Verde	495						495
Chad					124'130		124'130

Country	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agri. land [ha]	Wild collection [ha]*	Other non agri. land [ha]	Total [ha]
Channel Islands	180						180
Chile	16'305				51'548		67'853
China	3'135'000				973'000		4'108'000
Colombia	22'314				7'320	23'090	52'724
Comoros	2'142						2'142
Cook Islands	24						24
Costa Rica	8'964						8'964
Côte d'Ivoire	50'574				1'522		52'096
Croatia	103'166						103'166
Cuba	6'181						6'181
Cyprus	6'022						6'022
Czech Republic	538'894						538'894
Congo, D.R.	60'624						60'624
Denmark	256'711				2'648		259'359
Dominica	240						240
Dominican Republic	169'026						169'026
Ecuador	41'793	79	40'007		330		82'209
Egypt	116'000				60'000		176'000
El Salvador	1'679						1'679
Estonia	206'590				174'034		380'624
Eswatini	186						186
Ethiopia	186'155				9'033		195'188
Falkland Islands (Malvinas)	31'937						31'937
Faroe Islands	251						251
Fiji	41'154				653		41'807
Finland	297'442				11'263'583		11'561'025
France	2'035'024						2'035'024
French Guiana (France)	3'103						3'103
French Polynesia	1'512						1'512
Gambia	20						20
Georgia	1'452				215	1'507	3'174
Germany	1'521'314						1'521'314
Ghana	29'663				108'981		138'644
Greece	492'627				317'053		809'680
Grenada	84						84
Guadeloupe (France)	272						272
Guatemala	14'000				5		14'005
Guinea	10				1'000		1'010
Guinea-Bissau	835						835
Guyana					60'000		60'000
Haiti	4'403						4'403
Honduras	29'274						29'274
Hungary	209'382						209'382
Iceland	24'855				200'032		224'887
India	1'938'221				1'490'418		3'428'639
Indonesia	251'631				18'412		270'043
Iran (Islamic Republic of)	11'916			20'000	50'219		82'135
Iraq	63						63
Ireland	118'699						118'699
Israel	6'666				4		6'669
Italy	1'958'045						1'958'045
Jamaica	374				36		410
Japan	10'792						10'792
Jordan	1'446						1'446
Kazakhstan	192'134						192'134
Kenya	154'488				121'625		276'113
Kiribati	1'600						1'600

Country	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agri. land [ha]	Wild collection [ha]*	Other non agri. land [ha]	Total [ha]
Kosovo	160				179'580		179'740
Kuwait	22						22
Kyrgyzstan	22'118				13'489		35'607
Lao P.D.R	7'668				17'068		24'736
Latvia	280'383						280'383
Lebanon	1'241				309		1'551
Lesotho	1				6'363		6'364
Liberia	2						2
Liechtenstein	1'413						1'413
Lithuania	239'691						239'691
Luxembourg	5'782						5'782
Madagascar	48'757				7'649		56'407
Malawi	12'399						12'399
Malaysia	9'575						9'575
Mali	12'655				8'690		21'344
Malta	47						47
Martinique (France)	398						398
Mauritania					2'800		2'800
Mauritius	3						3
Mayotte	35						35
Mexico	183'225				958'380		1'141'605
Moldova	17'151				377		17'528
Mongolia	636						636
Montenegro	4'455				143'410		147'864
Morocco	9'917				268'129		278'046
Mozambique	14'933				813'000		827'933
Myanmar	12'305	15					12'320
Namibia	66				1'123'603		1'123'669
Nepal	11'851				24'422		36'273
Netherlands	57'904						57'904
New Caledonia	94						94
New Zealand	88'871						88'871
Nicaragua	34'787						34'787
Niger	254						254
Nigeria	57'117	3'600			1'000		61'717
Niue	43				112		155
North Macedonia	4'409				556'600		561'009
Norway	46'377						46'377
Oman	43						43
Pakistan	64'885				44'620		109'505
Palestine	4'870						4'870
Panama	5'929						5'929
Papua New Guinea	49'573						49'573
Paraguay	42'818						42'818
Peru	311'461	4			213'393		524'858
Philippines	218'570						218'570
Poland	484'676						484'676
Portugal	213'118		19'533		40'000		272'651
Puerto Rico	14						14
Republic of Korea	24'700						24'700
Réunion (France)	1'272						1'272
Romania	326'260				1'787'548		2'113'808
Russian Federation	606'975				133'838		740'813
Rwanda	2'130						2'130
Samoa	97'656						97'656
Sao Tome and Principe	10'934						10'934

Country	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agri. land [ha]	Wild collection [ha]*	Other non agri. land [ha]	Total [ha]
Saudi Arabia	18'631						18'631
Senegal	7'989				34'413		42'402
Serbia	19'254						19'254
Sierra Leone	99'238						99'238
Singapore	3						3
Slovakia	188'986						188'986
Slovenia	47'848				13'238		61'086
Solomon Islands	4'714						4'714
Somalia					826'400		826'400
South Africa	82'818				1'538'832	107	1'621'756
Spain	2'246'474				38'184		2'284'659
Sri Lanka	77'169						77'169
Sudan	76'941		451		2'393		79'785
Suriname	94						94
Sweden	608'758						608'758
Switzerland	160'992						160'992
Syrian Arab Republic	19'987				8'000		27'987
Taiwan	8'759	2					8'761
Tajikistan	8'806						8'806
Tanzania	278'467				2'418'740		2'697'207
Thailand	95'066	268			117'704	17'866	230'905
Timor-Leste	63'882						63'882
Togo	41'323						41'323
Tonga	685						685
Tunisia	306'467		71'533	27'605	25'486		431'091
Turkey	646'247				163'224		809'471
Uganda	262'282				158'328		420'610
Ukraine	309'100				570'000		879'100
United Arab Emirates	4'687						4'687
United Kingdom	457'377						457'377
United States	2'023'430		205'196		338		2'228'964
US Virgin Islands	26						26
Uruguay	2'147'083						2'147'083
Uzbekistan	943				5'000		5'943
Vanuatu	25'648						25'648
Viet Nam	237'693	200'000			54'450		492'143
Zambia	1'228				3'200'000		3'201'228
Zimbabwe	415				282'014		282'429
World**	**71'514'583**	**209'900**	**337'060**	**47'605**	**35'064'187**	**64'057**	**107'237'391**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315
Blank cells: No data available.
**Wild collection and beekeeping areas*
***Total includes correction value for French overseas departments.*



Infographic 3: Organic producers 2018

Source: FiBL survey 2020

Organic producers and other operator types

Producers

There were almost 2.8 million organic producers worldwide. According to the data obtained, over 90 percent of the producers are in Asia, Africa, and Europe (Figure 9). The country with the most organic producers is India, followed by Uganda and Ethiopia (Figure 10).

Reporting precise figures on the number of organic farms remains difficult as some countries:

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

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

There is a challenge with the number of producers in some countries, as some certifiers provide data on all producers including small holders, whereas other certifiers provide data on the certificates only. This problem became particularly marked in the case of Mexico, where the data source changed, and the new source does not include the smallholder farmers, resulting in a major drop of organic producers in Mexico and Latin America as a whole. The change of data source had also an effect on the global number of organic producers: Almost 150'000, or 5.0 percent less producers were recorded compared with 2017. However, in all other continents, with the exception of Africa, the number of producers increased (Table 10).

Table 10: World: Development of the numbers of producers by region 2017 to 2018

Region	2017 [no.]	2018 [no.]	1 year growth [no.]	1 year growth [%]	10 years growth [no.]	10 years growth [%]
Africa	806'877	788'858	-18'019	-2.2	275'890	+53.8
Asia	1'231'159	1'317'023	+85'864	+7.0	587'427	+80.5
Europe	397'146	418'610	+21'464	+5.4	163'812	+64.3
Latin America	460'443	227'609	-232'834	-50.6	-56'756	-20.0
North America	22'966	23'957	+991	+4.3	7'102	+42.1
Oceania	26'750	20'859	-5'891	-22.0	12'393	+146.4
World	**2'945'341**	**2'796'916**	**-148'425**	**-5.0**	**989'989**	**+54.8**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

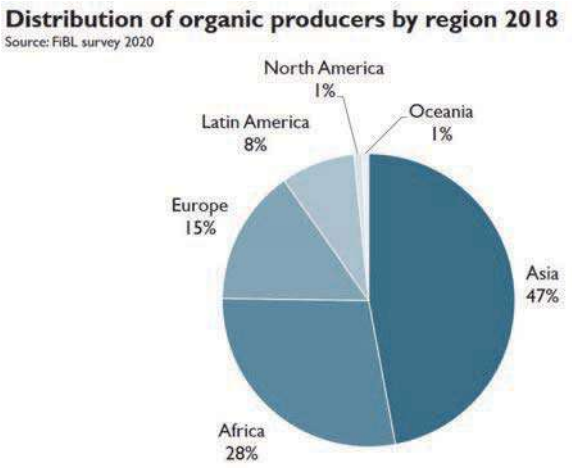


Figure 9: World: Distribution of organic producers by region 2018 (Total: 2.8 million producers)

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

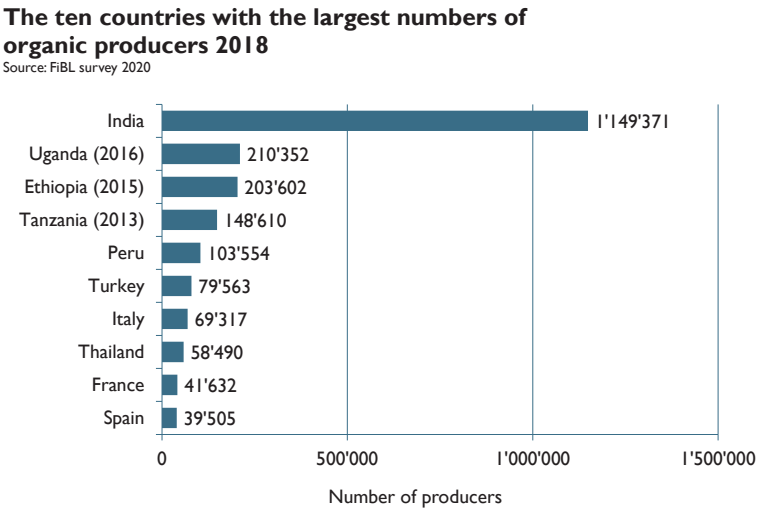


Figure 10: World: The ten countries with the largest numbers of organic producers 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Further operator types

Regarding data on further operator types, there are almost 96'000 processors and approximately 6'600 importers, most of them in Europe. However, not all countries reported the number of processors, exporters, importers, or other operator types. For instance, data for the United States is missing, and it can be assumed that the number of processors, importers, and exporters is far higher than what is indicated in Table 11.

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

Table 11: World: Organic producers and other operator types by country 2018

For many countries (particularly those with no private or governmental data collection system), data on the various operator types is missing or incomplete.

Country	Producers[1]	Processors	Importers	Exporters
Afghanistan	10	10		5
Albania	82	58	4 (2012)	30
Algeria (2016)	64	3	1	2
Andorra	1	4		
Argentina	1'366	340 (2016)		99 (2016)
Armenia	35			
Australia	1'829	2'077	161	299
Austria	25'795	1'651	62	4
Azerbaijan (2015)	305	50	50	
Bahamas (2016)	1	1		
Bangladesh (2011)	9'335			1
Belarus	24	24		7
Belgium	2'264	1'403	279	107
Belize	150	1		1
Benin (2017)	4'030	25		19
Bermuda (2017)		1		
Bhutan	4'354			2
Bolivia (2014)	12'114	273		
Bosnia and Herzegovina	251	23		20
Botswana	2	2		2
Brazil	17'508	10		7
Bulgaria (2017)	6'471	181	29	6
Burkina Faso (2017)	26'627	107		71
Burundi	16	1		1
Cambodia	5'788	54		31
Cameroon (2017)	499	44		19
Canada	5'791	1'719		
Cape Verde	1	1		1
Chad	1	4		4
Chile	1'609	197 (2014)		88 (2013)
China (2016)	6'308	3'865	66	1'198

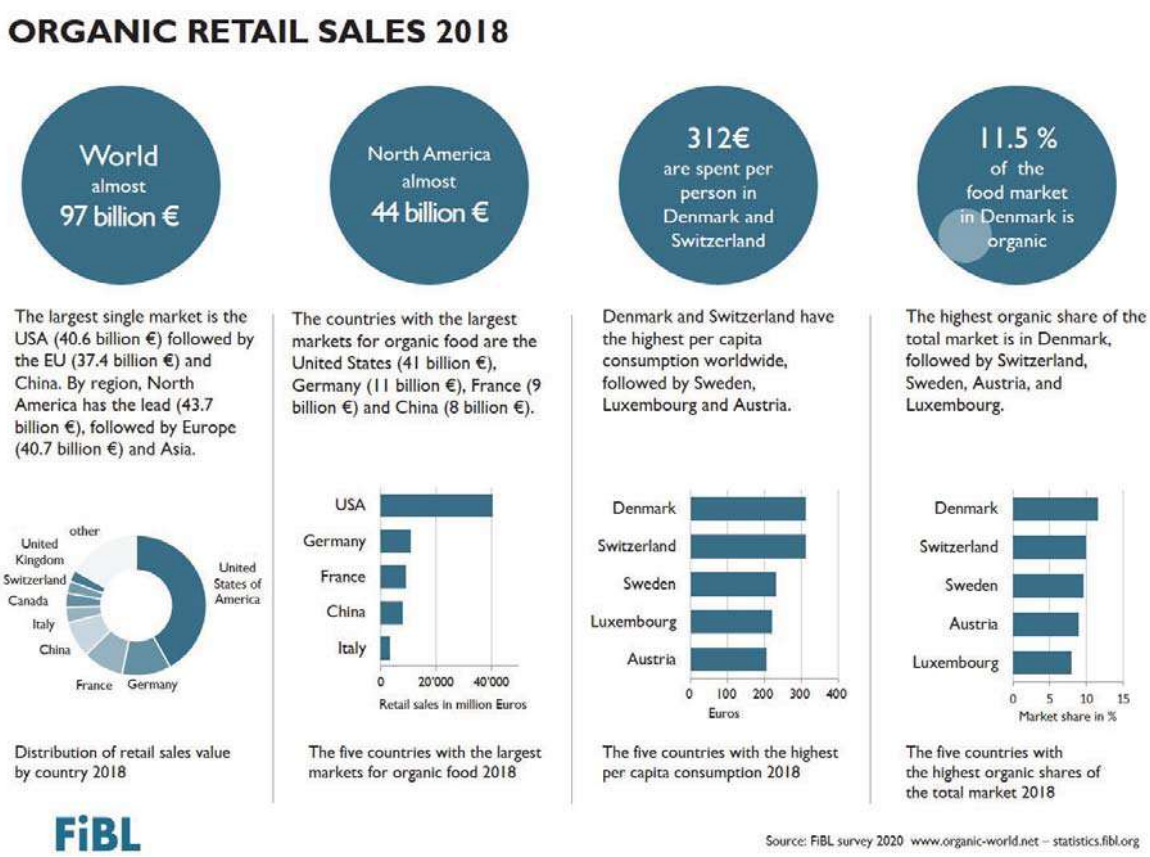
[1] Some countries report only the numbers of companies, projects or growers groups, which my each compromise a number of producers.

Country	Producers[1]	Processors	Importers	Exporters
Colombia	3'496	58		89
Comoros	680	7		7
Cook Islands	58	1		
Costa Rica (2017)	50	51		52
Côte d'Ivoire	2'776	34		28
Croatia	4'374	368	14	3
Cuba (2016)	510	1		2
Cyprus	1'249	57	19	1
Czech Republic	4'601	822	303	165
Congo, D.R.	30'170	22		19
Denmark	3'637 (2017)	1'018 (2017)	78 (2015)	80 (2015)
Dominican Republic	16'119	70		15
Ecuador	12'912	247 (2017)	4 (2017)	178 (2017)
Egypt	970			242
El Salvador	380	10		
Estonia	1'948	171	33	16
Eswatini	2	2		2
Ethiopia (2015)	203'602			40
Falkland Islands (Malvinas)	4			
Faroe Islands	1	1		
Fiji	67	7		
Finland	5'129	301	63	20
France	41'632	16'651	545	
French Guiana (France)	75	9		
French Polynesia	12	8		
Gambia (2017)	1			
Georgia (2015)	1'075	2		
Germany	31'713	15'441	1'723	1'208
Ghana	3'228	68		29
Greece	29'594	1'542	33	47
Grenada	23			
Guadeloupe (France)	63	9		
Guatemala (2014)	6'346	23		92
Guinea (2017)	1	3		3
Guinea-Bissau	1	1		1
Guyana		1		1
Haiti	4'661	2		8
Honduras (2017)	6'023		1	25
Hungary	3'929	515	42	
Iceland	29	26	3	
India	1'149'371	1'452		669 (2012)
Indonesia	18'162	775		225
Iran (Islamic Republic of)	20	19		19
Ireland	1'725	26	24	2
Israel	349	144	79	45
Italy	69'317	20'087	472	962 (2016)
Jamaica (2017)	127			
Japan	3'678	3'361	302	
Jordan (2017)	23	5		4
Kazakhstan	63	22	7	14
Kenya	37'295	22	15	32
Kiribati (2017)	900	1		
Kosovo	150	35		8
Kuwait	1		1	1

Country	Producers[1]	Processors	Importers	Exporters
Kyrgyzstan	1'107	29		16
Lao P.D.R. (2011)	1'342	1		1
Latvia (2018)	4'178	51	10	0
Lebanon	111	60	7	
Lesotho	3	3		2
Liechtenstein	46			
Lithuania	2'476	81	11	
Luxembourg	103	94	8	
Madagascar	32'367	217		155
Malawi	295	5		6
Malaysia	29	15		6
Mali (2017)	12'272	13		16
Malta	19	5	14	
Martinique (France)	64	19		
Mauritania (2017)		1		1
Mauritius	22	5		14
Mayotte	3			
Mexico	27'000	39		24
Moldova	135	14	2	31
Monaco		1		
Mongolia	13			
Montenegro	328	5		
Morocco	277	75 (2016)		215
Mozambique	269	19		13
Myanmar	48	74		28
Namibia	8	8		4
Nepal	1'622	6		1
Netherlands (2017)	1'696	995	385	87
New Caledonia	131	1		
New Zealand	876	304	29	94
Nicaragua	8'193	30		4
Niger (2017)	2	1		
Nigeria (2017)	1'091	14		82
Niue	1	1		
North Macedonia	775	20	4	5
Norway	2'057	457	93	
Oman	5			
Pakistan	415	125		37
Palestine (2017)	1'440	44		4
Panama	18	2		6
Papua New Guinea	12'742	80		
Paraguay	5'187	22		23
Peru	103'554	94		80
Philippines	12'366	251		103
Poland	19'224	533	208	249
Portugal	5'213	788	33	23
Puerto Rico (2016)	5	2		
Republic of Korea	15'500	729		3
Réunion (France)	306	32		
Romania (2017)	7'908	161	9	6
Russian Federation	40	26		8
Rwanda	3'870	24		14
Samoa	2'038	6		
San Marino		2		

Country	Producers[1]	Processors	Importers	Exporters
Sao Tome and Principe (2017)	3'564	4		5
Saudi Arabia	6			2 (2015)
Senegal (2013)	18'369	24		20
Serbia	373	123	51	3
Seychelles	1	1		2
Sierra Leone	304	4		2
Singapore		16		4
Slovakia (2017)	439	85	22	1
Slovenia	3'738	409	24	
Solomon Islands	1'098	1		
Somalia		5		4
South Africa	237	230		122
Spain	39'505	4'627	320	109
Sri Lanka	1'416	879		313
Sudan	3	10		11
Suriname	39	3		1
Sweden (2017)	5'801	1'328	89	10
Switzerland	7'032	1'289 (2017)	548 (2017)	18 (2017)
Syrian Arab Republic (2010)	2'458	9		
Taiwan	3'556			
Tajikistan	953			1
Tanzania (2013)	148'610	17		30
Thailand	58'490	209		69
Timor-Leste	4	16		4
Togo	38'414	42		31
Tonga	1'060	1		
Tunisia (2017)	7'236	290	20	79
Turkey	79'563	1'501	51	97
Uganda (2016)	210'352	15		14
Ukraine	501			
United Arab Emirates (2017)	95	5	3	2
United Kingdom	3'544	2'569	182 (2017	1
United States of America	18'166			
US Virgin Islands (2017)		1		
Uruguay	12	25		10
Uzbekistan	1	1		1
Vanuatu	47	4		
Venezuela		1		1
Viet Nam	17'169	555	40	60
Zambia	286			5
Zimbabwe	511	6		7
World*	**2'796'916**	**95'797**	**6'582**	**8'846**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315
Blank cells: No data available.
**Total number includes data for countries with less than three operators.*



Infographic 4: Organic retail sales 2018

Source: FiBL survey 2020

Retail sales and international trade data[1]

Retail sales

Whereas Amarjit Sahota presents global trends for the organic market along with much background information (page 138) in this chapter, we show the country-related market data that was compiled under the framework of the FiBL survey on organic agriculture. Data on total retail sales value was available for 56 countries (30 percent of the total countries with organic data), which means that for many countries with organic farming activities, such data is missing.

Total retail sales according to the FiBL survey amounted to almost 97 billion euros in 2018. The country with the largest market for organic food is the United States (40.6 billion euros), followed by Germany (10.9 billion euros), France (9.1 billion euros), and China (8.1 billion euros). The largest single market is the United States, followed by the European Union (37.4 billion euros) and China (Figure 85). By region, North America has the lead (43.7 billion euros), followed by Europe (40.7 billion euros) and Asia (Table 12).

Market growth was noted in all countries for which 2018 data were available, and in some cases, it was in the double digits. France was the country that registered the biggest growth; the market increased by 15.4 percent. Whereas the highest per capita consumption by continent is in North America (120 euros), by country it is highest in European countries. In 2018, Switzerland and Denmark had the highest per capita consumption (312 euros) worldwide, followed by Sweden (231 euros) and Luxembourg (221 euros) (Table 13).

Looking at the shares the organic market has of the total market, the leader is Denmark (11.5 percent), followed by Switzerland (9.9 percent), Sweden (9.6 percent), Austria (8.9 percent), and Luxembourg (8.0 percent) (Table 13).

Export data

International trade data is becoming available for more and more countries. These can be expressed as total export/import volumes in metric tons or as values. Some countries also provide breakdowns by crop and product. Table 13 shows the values of total exports where available. More than 50 countries provided data on export values.

Import data

Import data are not available for many countries. Since 2018, the European Union has collected import data; these are available on page 142. Data on US organic imports and exports (values and quantity) are available on the USDA website.[2]

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[1] Please note that due to differences in the methodology, some of the figures presented in this chapter differ from those collected in by Ecovia Intelligence (see chapter by Amarjit Sahota on page 146).
[2] The data can be found at http://apps.fas.usda.gov/gats/ExpressQuery1.aspx. Go to "standard query" and choose "Organics selected".

Table 12: Global market data: Retail sales and per capita consumption by region 2018

Region	Retail sales [Million €][1]	Per capita consumption [€]
Africa*	17	0.01
Asia	10'071	2.4
Europe	40'729	50.5
Latin America**	810	1.5
North America	43'677	119.9
Oceania	1'378	33.5
World	**96'683**	**12.9**

Source: FiBL-AMI survey 2020, based on data from government bodies, the private sector, and market research companies. For data sources, see annex, page 315.
** Data from Ethiopia and Kenya.*
*** Data from Belize, Brazil, Chile, Jamaica, Mexico, and Peru.*

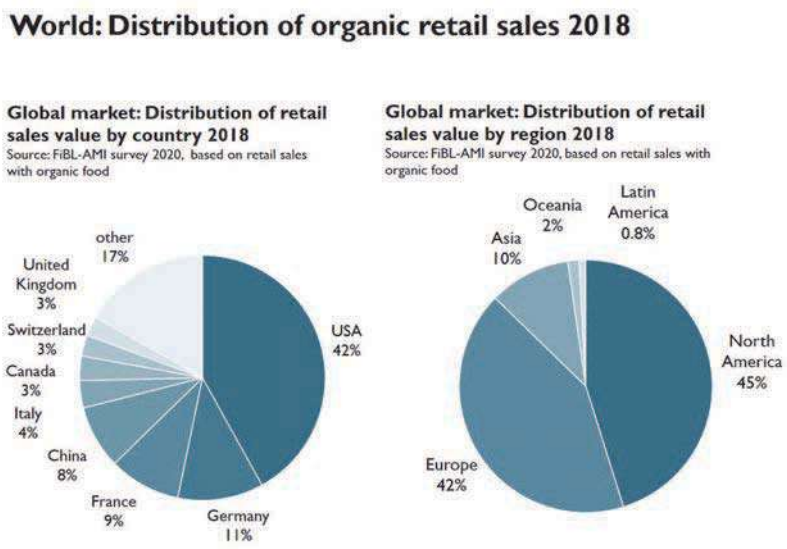


Figure 11: Global market for organic food: Distribution of retail sales by country 2018

Figure 12: Global market for organic food: Distribution of retail sales by region 2018

Source: FiBL-AMI survey 2020, based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 315

[1] According to the Central European Bank, 1 euro corresponded to 1.1810 US dollars in 2018.

The ten countries with the largest markets for organic food 2018
Source: FiBL-AMI survey 2020

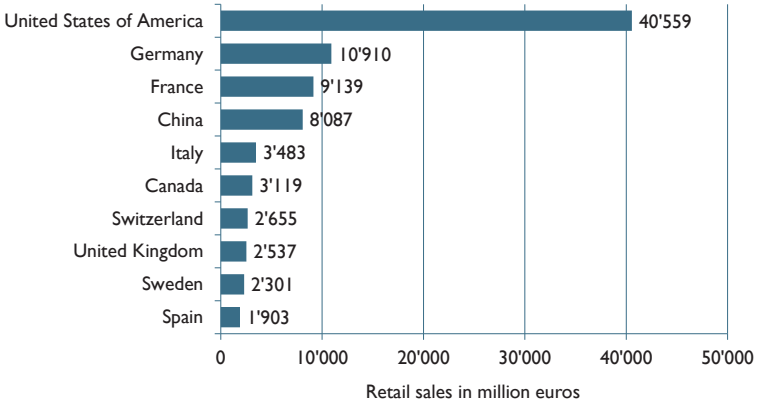


Figure 13: Global market: The countries with the largest markets for organic food 2018

Source: FiBL-AMI survey 2020, based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 315

The ten countries with the highest per capita consumption 2018
Source: FiBL-AMI survey 2020

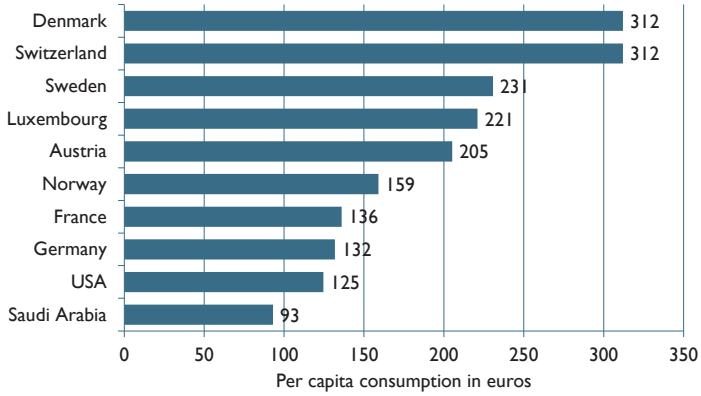


Figure 14: Global market: The ten countries with the highest per capita consumption 2018

Source: FiBL-AMI survey 2020, based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 315

Table 13: Global market data: Retail sales, organic share of all retail sales, per capita consumption, and exports by country 2018

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/statistics-data-revisions.html and included into the FiBL database.

Country	Data year	Retail sales [Million €][1]	Organic share [%]	€/person	Exports [Million €]
Argentina	2009				122
Australia	2018	1'224		49	434
Austria	2011				80
	2018	1'810	8.9	205	
Azerbaijan	2011	3		0.3	
Belgium	2018	698	3.0	61	
Belize	2015	0.1		0.2	0.3
Bhutan	2018	0.0	0.3	0.0	0.0
Bolivia	2011				179
Bosnia and Herzegovina	2017	0.4		0.1	
	2018				6
Brazil	2016	778		4	126
Bulgaria	2017	29		4	
Canada	2016				434
	2017		2.6		
	2018	3'119		84	
Chile	2009	2		0.1	
	2017				213
China	2018	8'087		6	806
Colombia	2007				13
Costa Rica	2008	1		0.3	
	2009				19
Croatia	2011				3
	2018	99	2.2	24	
Cyprus	2006	2		2	
Czech Republic	2016				61
	2017	127	1.2	12	
Denmark	2018	1'807	11.5	312	390
Dominican Republic	2016				191
Estonia	2017	42	2.7	32	27
Ethiopia	2015	13		0.1	181
Finland	2018	336	2.4		28
France	2017				707
	2018	9'139	4.8	136	
Germany	2018	10'910	5.3	132	
Greece	2017	66		6	
Guatemala	2014			18	
Hungary	2009				20
	2015	30		3	
India	2017	186		0.2	
	2018				641
Ireland	2011		0.7		
	2017	206		43	
Italy	2017		3.2		
	2018	3'483		58	2'266
Jamaica	2016	1		0.3	
Japan	2017		1.4		
	2018	1'419		11	
Kazakhstan	2015				9

[1] According to the Central European Bank, 1 euro corresponded to 1.1810 US dollars in 2018.

Country	Data year	Retail sales [Million €][1]	Organic share [%]	€/person	Exports [Million €]
Kenya	2018	3.9		0.1	24.4
Kosovo	2015				6
Kyrgyzstan	2017				418
Latvia	2017	51	1.5	6	51
Lithuania	2017	51	1.0	18	45
Luxembourg	2018	135	8.0	221	
Mexico	2013	14		0.1	373
Moldova	2011				15
Montenegro	2010	0.1		0.2	
Netherlands	2016				1'200
	2018	1'287	4.7	75	
New Zealand	2017	155	2.2	33	224
Norway	2016		1.7		
	2018	423		79	
Peru	2010	14		0.5	
	2018				339
Poland	2018	250		7	
Portugal	2011	21	0.2	2	
Republic of Korea	2017	330			
Romania	2011				200
	2016	41		2	
Russian Federation	2009				4
	2018	160		1.1	
Samoa	2010				0.1
Saudi Arabia	2018			93	
Serbia	2016				19
Singapore	2017	16		3	
Slovakia	2010	4	0.2	1	
Slovenia	2009				0.1
	2013	49	1.8	27	
Spain	2016				891
	2017	1'903	2.8	42	
Sri Lanka	2015				259
Sweden	2018	2'301	9.6	231	117
Switzerland	2018	2'655	9.9	312	
Thailand	2014	12		0	28
Turkey	2014	46		1	
	2017				182
Uganda	2015				50
Ukraine	2018	33		1	104
United Kingdom	2016				194
	2018	2'537		38	
USA	2018	40'559	5.7	124.5	2'981.3
Viet Nam	2016	18	0.2		77
Total		**96'683**	**12.9**		

Source: FiBL-AMI survey 2020, based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 315
Blank cells: No data available

Organic farming in developing countries and emerging markets

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

More than 2.4 million organic producers from the countries on the DAC list[1] were counted (86 percent of all organic producers). Almost a quarter of the world's organic agricultural land, 17.3 million hectares, is located in countries listed on the DAC list.

If wild collection and beekeeping areas are included, the total area is 37.4 million hectares. Almost half of the agricultural land of the countries on the DAC list is located in Latin American countries (almost 8 million hectares), with Asia (6.5 million) and Africa (2.0 million) in second and third place. The countries with the largest areas of organic agricultural land are Argentina, China, Uruguay, India, and Brazil, in that order. Not surprisingly, most of them are large countries (Figure 15).

However, when it comes to organic agricultural land as a percentage of the total area under cultivation, the order is different. The countries on the DAC list with the highest percentages of organic agricultural land are Samoa (34.5 percent), Sao Tome and Principe (22.5 percent), and Timor-Leste (16.8 percent). Argentina, with by far the largest area under organic cultivation (with 3.6 million hectares), is ranked fifteenth when the organic agricultural area is expressed as a share of the total agricultural area. The organic share of the total agricultural land of the top ten countries on the DAC list is comparable to that of many European countries, and they can be attributed in part to a high production potential for, and focus on, exports. Support activities may also play a role. However, out of all the countries on the DAC list, only 26 percent of them have an organic share higher than one percent of the total agricultural area (Figure 16).

Land use details were available for almost 80 percent of the agricultural land of the countries on the DAC list; crop data is missing for some of the world's largest producing countries (India and Brazil). Available statistics show that organic grassland/grazing areas constitute over 34 percent of the organic agricultural land, organic arable land 27 percent, and organic permanent crops 18 percent. Exports play an important role, either for meat products (mainly from Argentina and Uruguay) or for unprocessed permanent and arable crops. The most important crops are export crops, such as cereals, coffee, oilseeds, textile crops (mainly cotton), nuts, coconuts, olives, cocoa, etc. For Africa, coffee and olives, for Asia, cereals and oilseeds, and for Latin America, coffee and cocoa are the most important crops.

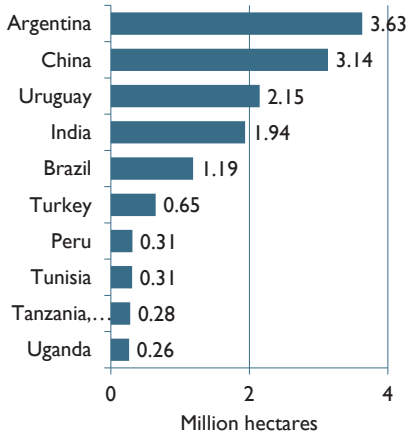
[1] The country list of the Development Assistance Committee DAC is available on the OECD website at http://www.oecd.org/dac/stats/daclist.htm

Table 14: Countries on the DAC list: Development of organic agricultural land 2013-2018

Region	2013 [ha]	2014 [ha]	2015 [ha]	2016 [ha]	2017 [ha]	2018 [ha]
Africa	1'202'738	1'252'645	1'674'509	1'793'266	1'998'755	2'002'669
Asia	3'309'384	3'436'793	3'770'051	4'813'971	5'933'995	6'461'521
Europe	476'759	509'089	508'151	546'663	541'906	676'168
Latin America	6'305'127	6'424'945	6'802'417	7'354'087	7'959'556	7'972'782
Oceania	62'511	85'159	73'802	113'164	158'871	221'097
Total	**11'356'518**	**11'708'630**	**12'828'930**	**14'621'151**	**16'593'083**	**17'334'237**

Source: FiBL surveys 2015-2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

The ten countries on the DAC list with the largest areas of organic agricultural land 2018
Source: FiBL survey 2020



The ten countries on the DAC list with the highest organic shares of the total agricultural land 2018
Source: FiBL survey 2020

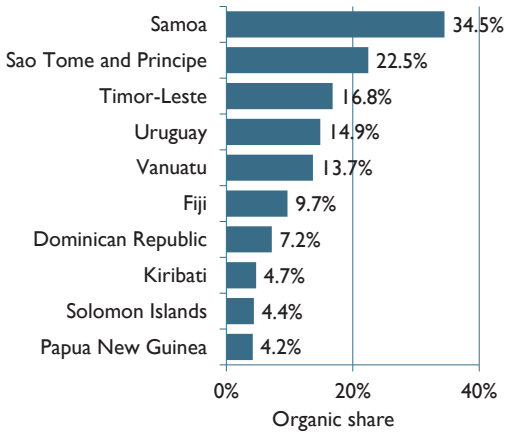


Figure 15 (left): Countries on the DAC list: The ten countries with the largest areas of organic agricultural land in 2018

Figure 16 (right): Countries on the DAC list: The ten countries with the highest organic shares of the total agricultural land in 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Land use and key commodities in organic agriculture

Land use

Over two-thirds of the 71.5 million hectares of organic agricultural land in 2018 were grassland/grazing areas (almost 48.2 million hectares). The cropland area (arable land with 13.3 million hectares and permanent crops with 4.7 million hectares) constituted 18 million hectares, and over 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 such as Brazil and India. General land use information was available for 92 percent of the organic agricultural land; however, this does not mean that detailed crop information is available for all areas as not all countries provided detailed crop data.[1]

The FAO classification[2] of land use was utilized for this survey with slight modifications. A system similar to that of Eurostat was used for the classification of crops. The following main levels were used to classify the land use data: arable land, permanent crops, cropland for which no further details were available (cropland = arable land + permanent cropland), permanent grassland/grazing areas, other agricultural areas (such as hedges), and agricultural land for which no details were available at all. For crop groups by land use type, see Table 16.

Aquaculture, forest, and grazed non-agricultural land were distinguished from "agricultural land" with a separate category, as were organic wild collection areas and beekeeping areas.

The land use information can be summarized by geographical region as follows (Table 15):

– Africa: Land use information was available for more than 90 percent of the total organic agricultural land in Africa. Almost two-thirds of the agricultural land is used for permanent crops. The main permanent crops are cash crops, such as coffee and olives; among the main arable crops are oilseeds (sesame, soybeans, and peanuts) and cotton. For land use details in Africa, see page 193.
– Asia: Land use details are known for almost two-thirds of the total organic agricultural land in Asia. Arable land is mainly used for cereals, including rice. Furthermore, oilseeds, dry pulses and textile crops are important. For land use details in Asia, see page 209.
– Europe: In Europe, agricultural land use is well known, and the main crop categories are well documented. Permanent grassland accounts for almost 40 percent of the organic agricultural land. Arable land (49 percent) is mainly used for the cultivation of cereals and by green fodder (2.6 million hectares and 2.5

[1] For some countries, only information on the main uses (arable crops, permanent crops, and permanent grassland) was available. For other countries, very detailed statistical land use information can be found.
[2] For more details, see the FAOSTAT homepage, faostat.fao.org: Home > Concepts and Definitions > Glossary, or http://faostat.fao.org/site/379/DesktopDefault.aspx?PageID=379

million hectares respectively). Permanent crops account for eleven percent of the organic agricultural land. More than one-third of this land was used for olives, followed by grapes, nuts, and temperate fruits. For land use details, see page 226).

- Latin America and the Caribbean: Almost three-quarters of the total organic agricultural land in Latin America is permanent grassland. Permanent crops account for 9 percent of the total organic agricultural area. More than one-third of the permanent cropland is used for coffee, followed by cocoa and tropical fruits. For details on land use in Latin America and the Caribbean, see page 216.
- North America: Arable land and permanent grassland/grazing areas have similar shares of the total organic agricultural land. A major proportion of the arable land is used for cereal production and cultivation of green fodder. For details on land use in North America, see page 278.
- Oceania: Most of the land in Australia is used for extensive grassland/grazing. A wide range of permanent crops is grown in the Pacific region. For details, see page 292.

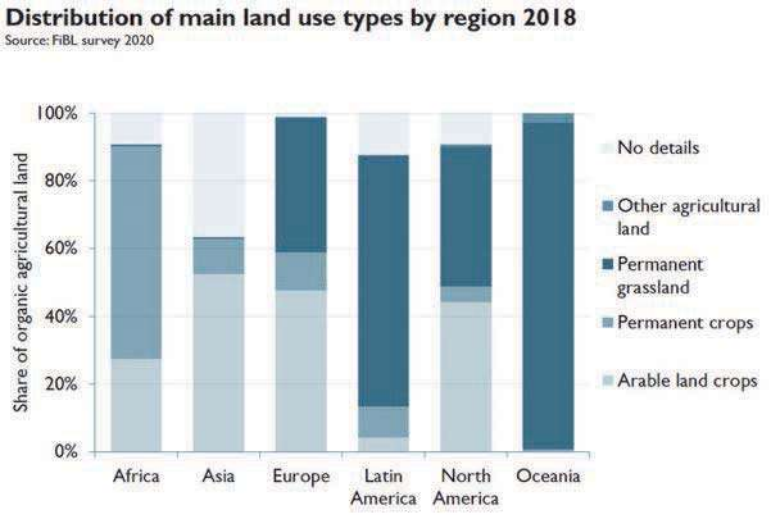


Figure 17: World: Distribution of main land use types by region 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

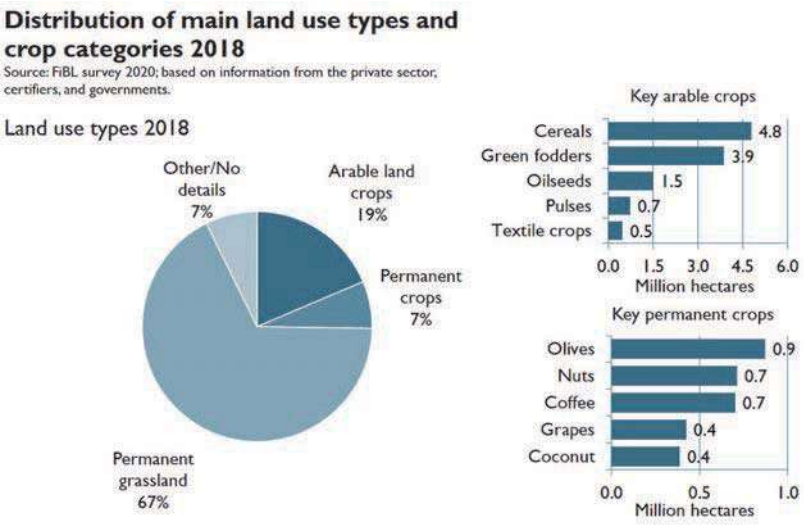


Figure 18: World: Distribution of main land use types and key crop categories 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

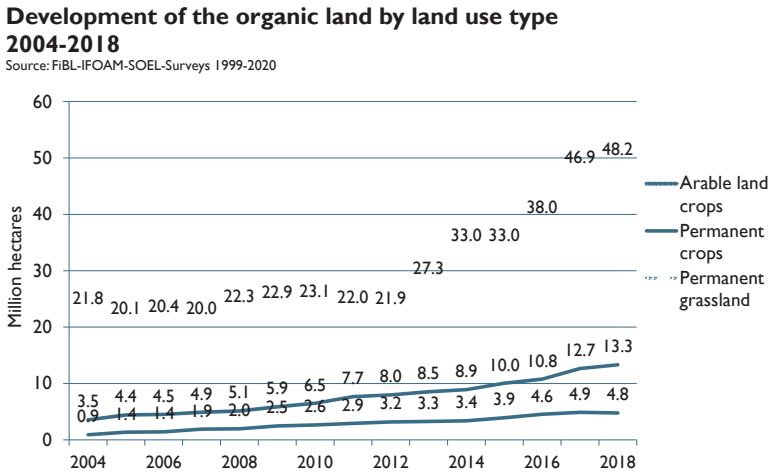


Figure 19: World: Development of organic arable land, permanent cropland and permanent grassland/grazing areas 2004-2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Table 15: World: Land use in organic agriculture by region (including in-conversion areas) 2018

Land use	Africa [ha]	Asia [ha]	Europe [ha]	Latin America [ha]	North America [ha]	Oceania [ha]	Total [ha]
Arable crops	550'334	3'434'390	7'462'240	335'740	1'476'682	57'034	13'316'419
Permanent crops	1'258'648	666'832	1'699'119	740'278	151'966	217'250	4'734'094
Permanent grassland	4'031	27'930	6'241'185	5'923'885	1'371'893	34'683'571	48'252'495
World*	**2'003'977**	**6'537'226**	**15'635'505**	**8'008'581**	**3'335'002**	**35'999'373**	**71'514'583**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Table 16: World: Land use and crop categories in organic agriculture worldwide 2018

Land use	Crop group	Area [ha]
Agricultural land and crops, no details	Agricultural land and crops, no details	**3'864'048**
Arable crops	Arable crops, no details	369'634
	Arable crops, other	155'090
	Cereals	4'782'363
	Dry pulses	726'845
	Fallow land, crop rotation	535'649
	Flowers and ornamental plants	1'504
	Fresh vegetables and melons	387'352
	Hops	711
	Industrial crops	12'331
	Medicinal and aromatic plants	286'359
	Mushrooms and truffles	16'602
	Oilseeds	1'484'585
	Other arable land crops	700
	Plants harvested green	3'866'450
	Root crops	113'765
	Seeds and seedlings	228
	Strawberries	7'507
	Sugarcane	94'811
	Textile crops	468'921
	Tobacco	5'013
Arable crops total		***13'316'419***
Permanent crops	Berries	61'549
	Citrus fruit	90'047
	Cocoa	322'184
	Coconut	386'448
	Coffee	700'850
	Flowers and ornamental plants, permanent	24
	Fruit	24'318
	Fruit of temperate climate zones	223'516
	Fruit, tropical and subtropical	274'448
	Grapes	422'277
	Medicinal and aromatic plants, permanent	84'600
	Nurseries	981
	Nuts	711'468

Land use	Crop group	Area [ha]
	Olives	872'237
	Tea	140'511
	Permanent crops, other	412'565
Permanent crops total		***4'734'094***
Permanent grassland		**48'252'495**
World*		**71'514'583**

*Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315. *Totals include other agricultural areas, land for which no details were available, and correction values for some countries for land with double cropping during one year.*

Arable land

With a total of more than 13.3 million hectares, organic arable land constitutes 19 percent of the world's organic agricultural land and 0.9 percent of the world's arable cropland.[1]

An increase of 5.1 percent over 2017 was reported, and there was an increase in most crop categories. However, some categories, such as flowers and ornamental plants, and textile crops, reported a drop (Table 17).

Almost 60 percent of the arable land is located in Europe, followed by Asia (26 percent), and North America (11 percent) (Figure 20). Most of the arable cropland is used for cereals including rice (4.8 million hectares), green fodder (3.8 million hectares), and oilseeds (1.5 million hectares) (Figure 21 and Table 17).

Table 17: Use of organic arable land (including in-conversion areas), 2017 and 2018 compared

Crop group	2017 [ha]	2018 [ha]	Change 2017-2018 [ha]	Organic share [%]
Cereals	4'368'170	4'782'363	+414'192	0.7%
Dry pulses	660'911	726'845	+65'934	0.8%
Flowers and ornamental plants	11'776	1'504	-10'273	-
Green fodder from arable land	3'864'607	3'866'450	+1'843	-
Hops	605	711	+106	0.8%
Industrial crops	11'008	12'331	+1'323	-
Medicinal and aromatic plants	231'954	286'359	+54'405	16.9%
Mushrooms and truffles	14'084	16'602	+2'518	-
Oilseeds	1'414'315	1'484'585	+70'270	0.6%
Root crops	103'427	113'765	+10'338	0.2%
Strawberries	8'389	7'507	-882	1.9%
Sugarcane	89'826	94'811	+4'985	0.4%
Textile crops	504'889	468'921	-35'968	1.3%
Tobacco	5'878	5'013	-865	0.1%
Vegetables	375'907	387'352	+11'444	0.6%
World*	**12'665'172**	**13'316'419**	**651'247**	**0.9%**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315
Not all countries included in the FiBL survey provided data on land use or crop areas.
**Total includes arable crop groups for which no further details were available, data for fallow land, some minor or not specified crop groups.*

[1] There were 1'561'336'753 hectares of arable cropland in 2017, according to FAOSTAT, FAO, Rome. See the FAO Homepage at www.fao.org/faostat/en/#data > Inputs > Land > www.fao.org/faostat/en/#data/RL

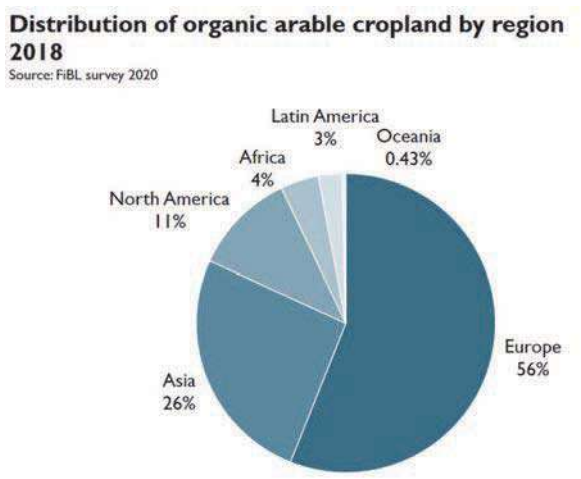


Figure 20: World: Distribution of organic arable cropland by region 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

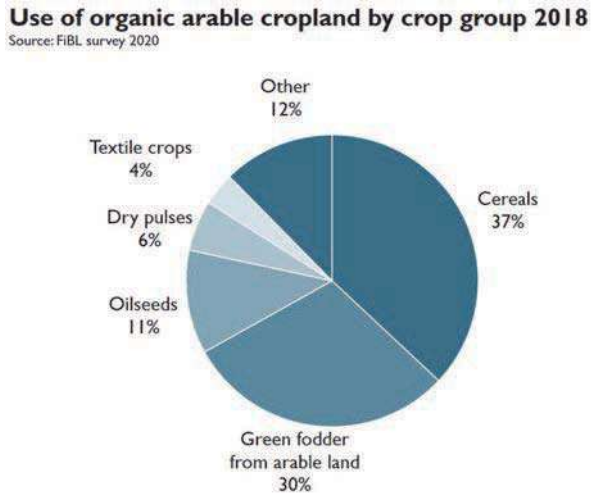


Figure 21: World: Use of arable cropland by crop group 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Permanent crops

Permanent crops accounted for more than 4.7 million hectares, which is 2.8 percent of the world's permanent cropland.[1] Compared with 2017, a decrease of more than 140'000 hectares, or 2.9 percent, was reported. This decrease is mainly due to the fact that for Mexico (change of data source) considerably less coffee and tropical fruit and for the Dominican Republic a drop of 77'000 hectares of cocoa was reported.

Seven percent of the organic agricultural land is permanent cropland. Thus, permanent cropland has a higher share in organic agriculture than in total agriculture, where permanent crops account for slightly more than 3 percent of the total.

Most of the permanent cropland is in Europe (1.7 million hectares), followed by Africa (1.3 million hectares), and Latin America (almost 0.7 million hectares) (Table 15 and Figure 22). The most important crops are olives, with nearly 0.9 million hectares, constituting almost 20 percent of the organic permanent cropland, followed by nuts (more than 0.7 million hectares), coffee (0.7 million hectares), grapes (0.4 million hectares), and coconuts (almost 0.4 million hectares) (Figure 23 and Table 18).

Table 18: Use of organic permanent cropland (including in-conversion areas), 2017 and 2018 compared

Crop group	2017 [ha]	2018 [ha]	Change 2017-2018 [ha]	Organic share [%]
Berries	63'597	61'549	-2'048	11.3
Citrus fruit	98'186	90'047	-8'139	1.0
Cocoa	391'550	322'184	-69'366	2.7
Coconut	400'209	386'448	-13'762	3.1
Coffee	887'629	700'850	-186'778	6.5
Flowers and ornamental plants	69	24	-45	-
Fruit, no details	113'672	24'318	-89'354	0.4
Fruit, temperate	223'499	223'516	+17	1.9
Fruit, tropical and subtropical	378'517	274'448	-104'069	1.1
Grapes	403'057	422'277	+19'220	6.1
Medicinal and aromatic plants	79'744	84'600	+4'856	2.7
Nurseries	736	981	+245	-
Nuts	624'967	711'468	+86'501	5.3
Olives	882'938	872'237	-10'702	8.1
Tea	124'910	140'511	15'601	3.2
World*	**4'874'356**	**4'734'094**	**-140'262**	**2.8**

Source: FiBL survey 2020, based on data from governments, the private sector, and certifiers. For detailed data sources see annex, page 315
**Total includes permanent crop groups, for which no further details were available.*

[1] There were 167'877'447.5 hectares of permanent cropland in 2017 according to FAOSTAT, FAO, Rome. See the FAO Homepage at www.fao.org/faostat/en/#data > Inputs > Land > www.fao.org/faostat/en/#data/RL

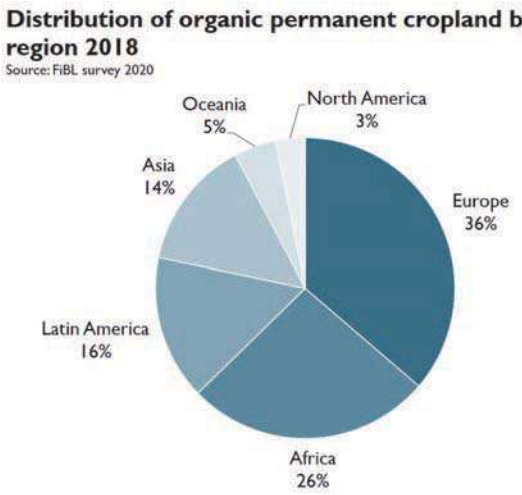


Figure 22: World: Distribution of permanent cropland by region 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

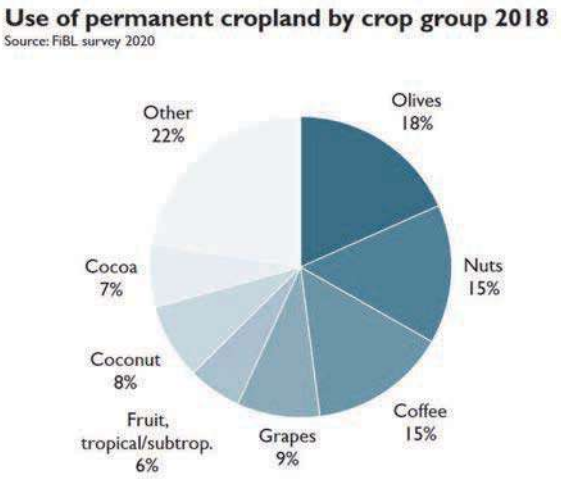


Figure 23: World: Use of permanent cropland by crop group 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Wild collection and beekeeping areas

The collection of wild-harvested crops is defined in the IFOAM Norms (IFOAM 2014), and wild collection activities are regulated by organic laws. A collection area (including beekeeping) of more than 35 million hectares was reported in 2018. The organic wild collection areas are concentrated in Europe, Africa, Latin America, and Asia (Figure 24 and Table 19); 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 and the United Republic of Tanzania (beekeeping) (Figure 25). According to experts, wild berries, apiculture, and medicinal and aromatic plants, as well as shea nuts in Africa and Brazil, and nuts in Latin America, play the most important roles (Table 20). Unfortunately, for most of the wild collection areas, no details are available.

Table 19: Wild collection and beekeeping areas by region 2017 and 2018 compared

Region	2017 [ha]	2018 [ha]	Change 2017-2018 [ha]	Change 2017-2018 [%]
Africa	13'274'435	11'529'725	-1'744'710	-13.1%
Asia	3'354'043	2'835'448	-518'595	-15.5%
Europe	17'385'600	17'246'818	-138'782	-0.8%
Latin America	4'216'347	3'444'450	-771'897	-18.3%
North America	83'832	6'981	-76'850	-91.7%
Oceania	769	765	-5	-0.6%
World	**38'315'026**	**35'064'187**	**-3'250'840**	**-8.5%**

Source: FiBL survey 2020, based on data from governments, the private sector, and certifiers.
For detailed data sources see annex, page 315

Table 20: Wild collection and beekeeping areas by crop group 2018

Land use	Area [ha]
Apiculture	2'629'713
Berries, wild	638'999
Cereals, wild	4'270
Forest honey	2'500'000
Fruit, wild	305'998
Medicinal and aromatic plants, wild	3'429'678
Mushrooms, wild	341
Nuts, wild	1'453'321
Nuts, wild, other	700'000
Oil plants, wild	31'995
Palm sugar	916
Palm trees, wild	66'800
Rosehips, wild	21'798
Seaweed	201'485
Wild collection, no details	23'078'849
World	**35'064'187**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. The total includes areas, for which no details were available. For detailed data sources see annex, page 315

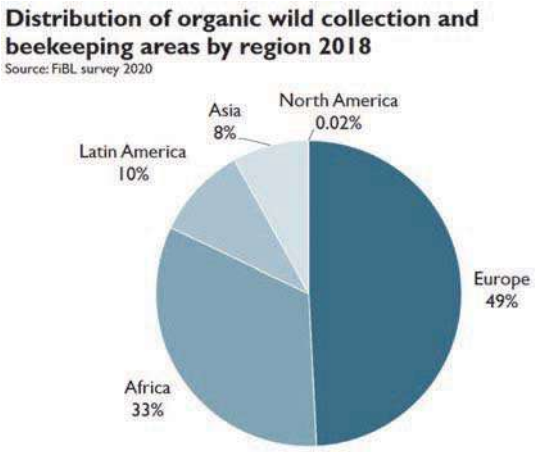


Figure 24: World: Distribution of organic wild collection and beekeeping areas by region in 2018

Source: FiBL survey 2020, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 315

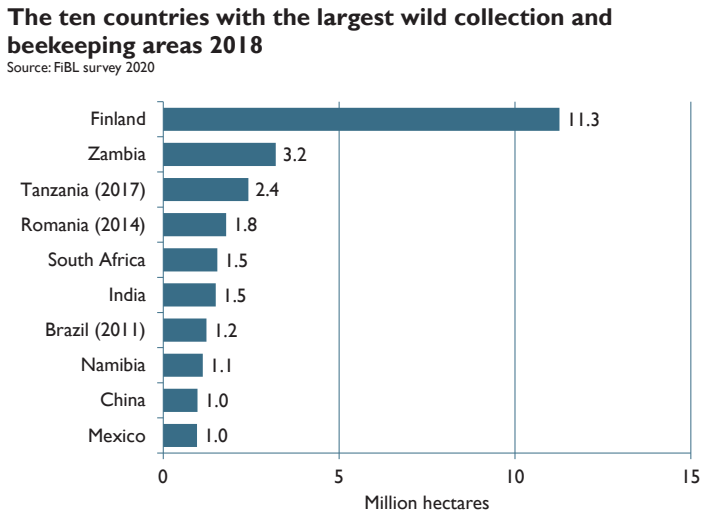


Figure 25: World: The ten countries with the largest organic wild collection and beekeeping areas in 2018

Source: FiBL survey 2020, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 315

Table 21: Wild collection and beekeeping areas by country 2018

Country	Land use	Area [ha]
Albania	Chestnuts, wild	2'770
	Wild collection, no details	611'123
Algeria	Wild collection, no details	628
Argentina	Wild collection, no details	1'001
Armenia	Wild collection, no details	9'310
Austria	Tilia leaves and Hypericum	1
Azerbaijan	Blackberries, wild	8
	Buckthorn, wild	3
	Chestnuts, wild	49
	Cornel, wild	374
	Fruit, wild, other	167
	Hawthorn, wild	150
	Medicinal and aromatic plants, wild, other	56
	Walnuts, wild	130
	Wild collection, no details	126
Belarus	Blueberries, wild	576'469
	Wild collection, no details	550
Belgium	Wild collection, no details	3
Benin	Baobab, wild	2'978
	Shea nuts, wild	722
Bhutan	Wild collection, no details	7'746
Bolivia	Chestnuts, wild	922'991
Bosnia and Herzegovina	Berries, wild, no details	62'030
	Medicinal and aromatic plants, wild, no details	103'504
Botswana	Devil's claw	102'500
	Fruit, wild, no details	2
Brazil	Bamboo, wild	24
	Wild collection, no details	1'229'421
Bulgaria	Wild collection, no details	307'020
Burkina Faso	Fruit, wild, no details	15'000
	Medicinal and aromatic plants, wild, no details	1'500
	Shea nuts, wild	198'257
	Wild collection, no details	17'008
Cameroon	Apiculture	47'000
Canada	Wild collection, other	2'373
	Wild rice, wild collection	4'270
Chad	Gums natural	116'330
	Wild collection, no details	7'800
Chile	Wild collection, no details	51'548
China	Wild collection, no details	973'000
Colombia	Palmito, wild	6'800
	Wild collection, other	520
Côte d'Ivoire	Coconuts, wild	462
	Shea nuts, wild	1'060
Denmark	Wild collection, no details	2'648
Ecuador	Mushrooms, wild	330
Egypt	Wild collection, no details	60'000
Estonia	Wild collection	174'034
Ethiopia	Apiculture	116
	Gums natural	8'917

Country	Land use	Area [ha]
Fiji	Fruit, wild, no details	653
Finland	Wild collection, no details	11'263'583
Georgia	Wild collection, no details	215
Ghana	Baobab, wild	60'147
	Nuts, wild	13'000
	Shea nuts, wild	35'834
Greece	Wild collection, no details	317'053
Guatemala	Apiculture	5
Guinea	Shea nuts, wild	1'000
Guyana	Palmito, wild	60'000
Iceland	Seaweed	200'032
India	Wild collection, no details	1'490'418
Indonesia	Apiculture	16'703
	Oil plants, wild	303
	Palm sugar	916
	Seaweed	136
	Wild collection, no details	354
Iran (Islamic Republic of)	Apiculture	39'564
	Wild collection, no details	10'655
Israel	Garlic, wild	4
Jamaica	Bamboo, wild	36
Kenya	Apiculture	121'625
Kosovo	Wild collection, no details	179'580
Kyrgyzstan	Almonds, wild	177
	Apples, wild	1'995
	Pistachios, wild	2'900
	Plums, wild	1'214
	Rosehips, wild	10
	Walnuts, wild	7'193
Lao P.D.R.	Bamboo, wild	282
	Wild collection, no details	16'786
Lebanon	Nuts, wild, no details	7
	Wild collection, no details	302
Lesotho	Rosehips, wild	6'363
Madagascar	Lemongrass, wild	177
	Wild collection, no details	7'472
Mali	Shea nuts, wild	8'690
Mauritania	Wild collection, no details	2'800
Mexico	Wild collection	958'380
Moldova	Fruit, wild	114
	Wild collection, no details	263
Montenegro	Wild collection, no details	143'410
Morocco	Argan Oil, wild	31'692
	Caper, wild	250
	Carob, wild	1'820
	Opuntia, wild	4'367
	Wild collection, other	230'000
Mozambique	Baobab	28'000
	Coconuts, wild	785'000
Namibia	Devil's claw	1'123'582
	Marula, wild	21

Country	Land use	Area [ha]
Nepal	Wild collection, no details	24'422
Nigeria	Apiculture	1'000
Niue	Fruit, wild, no details	112
Pakistan	Pine nuts, wild	44'620
Peru	Chestnuts, wild	213'393
Portugal	Wild collection, no details	40'000
Romania	Wild collection, no details	1'787'548
Russian Federation	Pine nuts, wild	121
	Seaweed	1'317
	Wild collection, no details	132'400
Senegal	Baobab, wild	15'613
	Wild collection, other	18'800
Slovenia	Wild collection, no details	13'238
Somalia	Gums natural	801'000
	Medicinal and aromatic plants, wild, no details	18'100
	Wild collection, no details	7'300
South Africa	Aloe vera, wild collection	1'093'812
	Honeybush	29'028
	Medicinal and aromatic plants, wild	40'019
	Mushrooms, wild	11
	Rooibos tea, wild	360'537
	Rosehips, wild	15'425
Spain	Wild collection, no details	38'184
Sudan	Baobab	1'340
	Gum Olibanum	1'053
Syrian Arab Republic	Wild collection, no details	8'000
Tanzania, United Republic of	Apiculture	2'403'700
	Wild collection, no details	15'040
Thailand	Wild collection, no details	117'704
Tunisia	Wild collection, other	25'486
Turkey	Wild collection, no details	163'224
Uganda	Shea nuts, wild	406
	Wild collection, no details	157'922
Ukraine	Wild collection, no details	570'000
United States of America	Blueberries, wild	338
Uzbekistan	Wild collection, no details	5'000
Viet Nam	Bamboo, wild	0
	Wild collection, no details	54'450
Zambia	Forest honey	2'500'000
	Nuts, wild, other	700'000
Zimbabwe	Fruit, wild, other	282'000
	Medicinal and aromatic plants, wild, other	14
North Macedonia	Medicinal and aromatic plants, wild, no details	556'600
World		**35'064'187**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Beehives

There were almost 2.6 million organic beehives in 2018, representing almost 2.6 percent of the world's beehives.[1] Organic beehives are concentrated in Latin America (37 percent) and Europe (37 percent) (Figure 26). The country with the largest number of organic beehives is Brazil (629'939), followed by Zambia (388'067), and Bulgaria (264'069). The total number increased almost five-fold since 2007, when over 535'000 beehives were reported (Figure 27).

However, it is important to note that some of the increases can be attributed to the continually improving data availability. The large increase from 2014 to 2015 is due to the fact that data for some countries such as Brazil was available for the first time. In addition, the growth between 2016 and 2017 is due to a significant increase of the beehives in Brazil, China, and Zambia. For 2018, decreases were reported for Brazil, Mexico and Ethiopia.

Nevertheless, it is expected that organic beekeeping will continue to grow worldwide thanks to the increasing demand for organic honey and bee products. One of the main challenges for new organic beekeepers is the conversion process due to the lack of access to knowledge on organic beekeeping practices and the organic certification process. Furthermore, the production of good quality organic honey and the control of the Varroa parasite with organic methods are major obstacles for organic beekeepers.

In 2015, FiBL, Naturland, Demeter, and Apicon created a new beekeeping platform, the IFOAM Apiculture Forum (IAF).[2] The IAF is a self-organised structure of IFOAM - Organics International with the aim to advance the development of organic beekeeping and to encourage the traditional practices employed by sustainable beekeeping.

[1] According to FAO, there were 90'999'730 beehives in 2017. The FAOSTAT website > Production > Live animals at http://www.fao.org/faostat/en/#data/QA

[2] For more information about the IFOAM Apiculture Forum, please visit www.organicbeekeeping.info

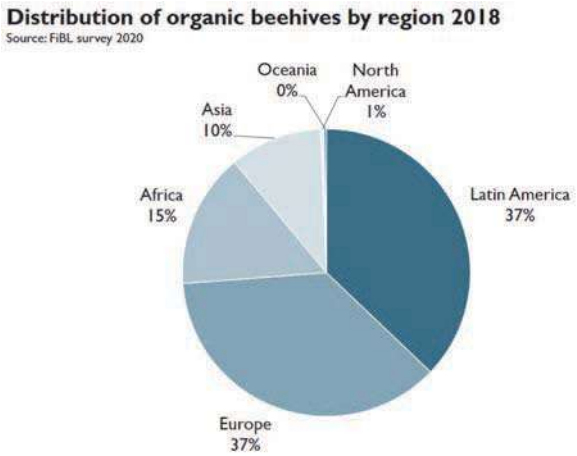


Figure 26: World: Distribution of organic beehives by region in 2018

Source: FiBL survey 2020, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 315

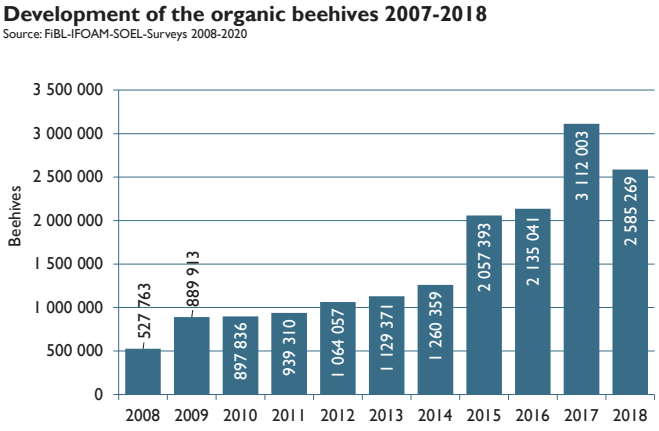


Figure 27: World: Development of the organic beehives 2008-2018

Source: FiBL-IFOAM-SOEL surveys 2006-2020. For detailed data sources see annex, page 315

Table 22: Number of organic beehives by country 2018

Country	Beehives [no.]
Argentina	33'788
Armenia	2'610
Australia	6'475
Austria	21'432
Azerbaijan	932
Belarus	65
Belgium	24
Bhutan	177
Bosnia and Herzegovina	150
Brazil	629'939
Bulgaria	264'069
Burkina Faso	11
Canada	10'199
Chile	36'543
China	229'084
Croatia	2'022
Cuba	58'901
Czech Republic	584
Denmark	315
Estonia	2'384
Finland	4'488
France	122'545
French Guiana (France)	21
Georgia	570
Germany	35'000
Guadeloupe (France)	36
Guatemala	2'210
Iran (Islamic Republic of)	4'640
Iraq	1'600
Italy	171'094
Kosovo	40
Latvia	28'090
Lebanon	393
Liechtenstein	1
Lithuania	883
Luxembourg	63
Madagascar	505
Martinique (France)	120
Mexico	150'431
Moldova	7'200
Montenegro	2'788
Morocco	1'242
Nicaragua	23'755
North Macedonia	8'138
Norway	1'721
Poland	2'319
Portugal	42'105
Réunion (France)	1'114
Romania	86'195
Saudi Arabia	1'382
Serbia	3'061
Slovenia	1'814
Spain	81'030
Sweden	2'182
Switzerland	4'153
Thailand	27'337
Tunisia	893
Turkey	51'742
Ukraine	300
Uruguay	24'297
Zambia	388'067
World	**2'585'269**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Aquaculture

Naturland from Germany was the first organisation to certify organic aquaculture products, starting in 1995 with the certification of carp in Germany. Organic was the first Voluntary Sustainability Standard (VSS) to cover aquaculture production (Potts et al. 2016). In 2005, IFOAM – Organics International approved the final version of its aquaculture standard.

A production volume of nearly 163'000 metric tons of organic aquaculture was reported in 2018. According to the available data, aquaculture production is concentrated in Europe (56 percent) and Asia (44 percent mainly China). The largest production volume was found in China (almost 72'000 metric tons) followed by Ireland (more than 27'000 metric tons, mainly blue mussel, salmon and oysters) and Norway (almost 17'000 metric tons) (Table 24 and Figure 28).

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

A breakdown by species was only available for a quarter of the total production. According to the available data, organic mussels are the most produced species (over 18'000 metric tons), followed by salmon (15'500 metric tons), and carps (almost 5'000 metric tons).

Table 23: Organic aquaculture: Production volume by species 2018

Main species	Production [MT]
Aquaculture, no details	118'363
Mussels	18'313
Salmon	15'496
Carps	4'874
Sturgeon	1'756
Rainbow trouts	1'631
Aquatic plants	722
Trout	562
Seabream	474
Shrimps	421
Sea bass	112
Oysters	56
Bream	54
Bass	44
Total	**162'878**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

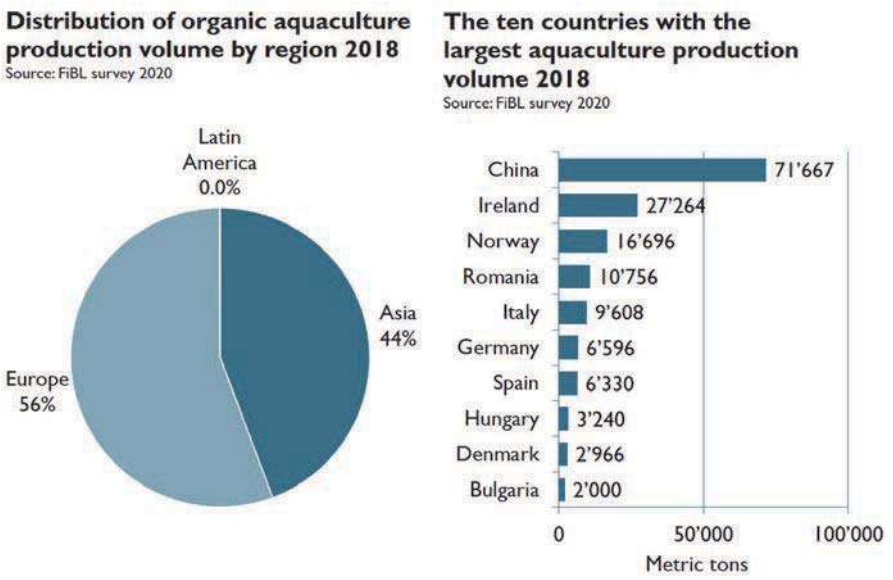


Figure 28: World: Organic aquaculture production volume: Distribution by continent and top 10 countries 2018

Source: FiBL-survey 2020; based on national data sources and certifier data. For detailed data sources see annex, page 315

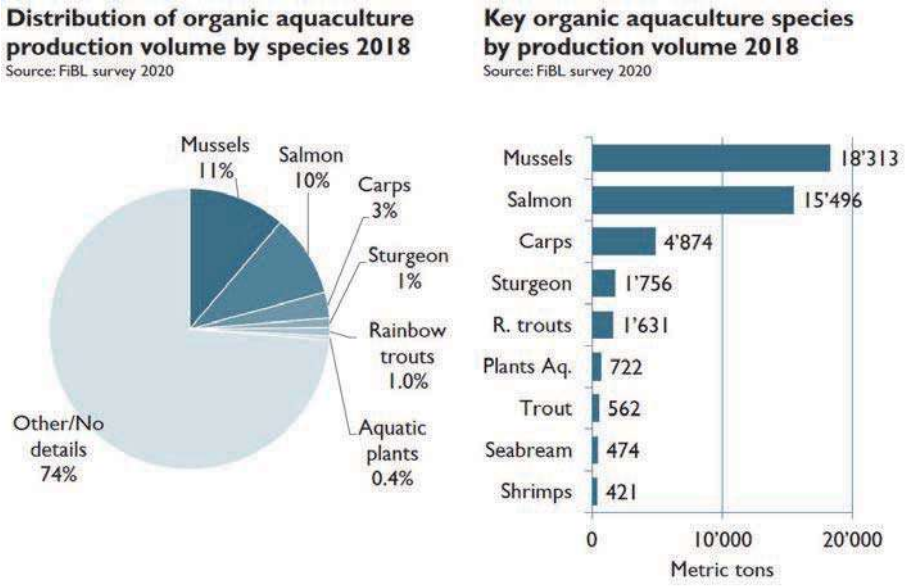


Figure 29: World: Organic aquaculture production volume: Distribution by species and key species 2018

Source: FiBL-survey 2020; based on national data sources and certifier data. For detailed data sources see annex, page 315

Table 24: Organic aquaculture: Production volume by country 2018

Country	Production [MT]
Austria	9
Bangladesh	342
Brunei Darussalam	79
Bulgaria	2'000
China	71'667
Croatia	285
Denmark	2'966
Ecuador	79
Estonia	156
Germany	6'596
Greece	1'452
Hungary	3'240
Ireland	27'264
Italy	9'608
Latvia	7
Lithuania	605
Norway	16'696
Poland	32
Portugal	1'100
Romania	10'756
Slovenia	630
Spain	6'330
Switzerland	370
Taiwan	50
Turkey	559

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

References and further reading

Bergleiter, S., Berner, N., Censkowsky, U. & Julià-Camprodon, G. (2009): Organic aquaculture 2009 – production and markets. Munich, Organic Services GmbH and Gräfelfing, Naturland e.V. 120 pp.

Food and Agriculture Organization of the United Nations (FAO) (2010): Organic aquaculture: The future of expanding niche markets. Available at http://www.fao.org/docrep/015/i2734e/i2734e04c.pdf

Potts, Jason; Wilkings, Ann; Lynch, Matthew; and McFatridge, Scott (Eds.) (2016): State of Sustainability Initiatives Review: Standards and The Blue Economy. International Institute for Sustainable Development, Manitoba, Canada. Available at http://www.iisd.org/ssi/standards-and-the-blue-economy/

Statistics on selected crops

In this section, some of the data on key crops and crop groups is presented, including the area under organic management compared with the total area of the crops. FiBL collected land use and crop data for the first time in 2004; hence, the development graphs show the growth since that year.

For this edition, we have not updated the existing crop texts but instead, we are presenting graphs: A map on the global distribution by country for a given crop/crop group, its development, the top then countries in term of organic area and organic share of total, the distribution by continent and, in the case of crop groups, the breakdown by crop. All these graphics are based on interactive Power BI graphs, which you can explore at https://statistics.fibl.org/visualisation.html.

It should be noted that the organic areas are mainly compared with the area harvested in 2017 as provided by FAO. The data may not necessarily be directly comparable to the areas sown or planted as registered by the certification bodies.

Data on conversion status: For some countries, data were collated from several certifiers, some of which provided information on the conversion status while others did not. In those cases, where the certifiers did not include information status, we assumed that land was fully converted. The tables presented in this section are only part of the information available in the FiBL crop database, which is available at statistics.fibl.org.

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

Table 25: World: Selected key crop groups and crops area in organic agriculture 2018 (overview including conversion areas)

Crop	Africa [ha]	Asia [ha]	Europe [ha]	Latin America [ha]	North America [ha]	Oceania [ha]	Total [ha]
Cereals	65'050	1'270'548	2'639'748	165'361	600'363	41'293	**4'782'363**
Citrus fruit	7'539	12'980	53'059	11'550	4'919		**90'047**
Cocoa	171'363	376		148'510		1'935	**322'184**
Coffee	361'640	67'152		247'789	87	24'182	**700'850**
Dry pulses	51'558	71'557	504'474	3'666	95'590	No data	**726'845**
Fruit temperate	3'849	53'382	167'442	15'378	12'465		**252'516**
Fruit, tropical and subtropical	49'155	34'354	36'010	130'998	3'519	20'412	**274'448**
Grapes	6'388	22'590	365'858	8'101	11'836	7'503	**422'277**
Oilseeds	193'684	634'479	496'099	45'261	115'063		**1'484'585**
Olives	256'809	6'535	603'019	5'154	719		**872'237**
Vegetables	39'827	54'187	184'373	31'801	73'238	3'927	**387'352**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

› Cereals

In 2018, almost 4.8 million hectares or 0.7 percent of the global cereal area was under organic management.

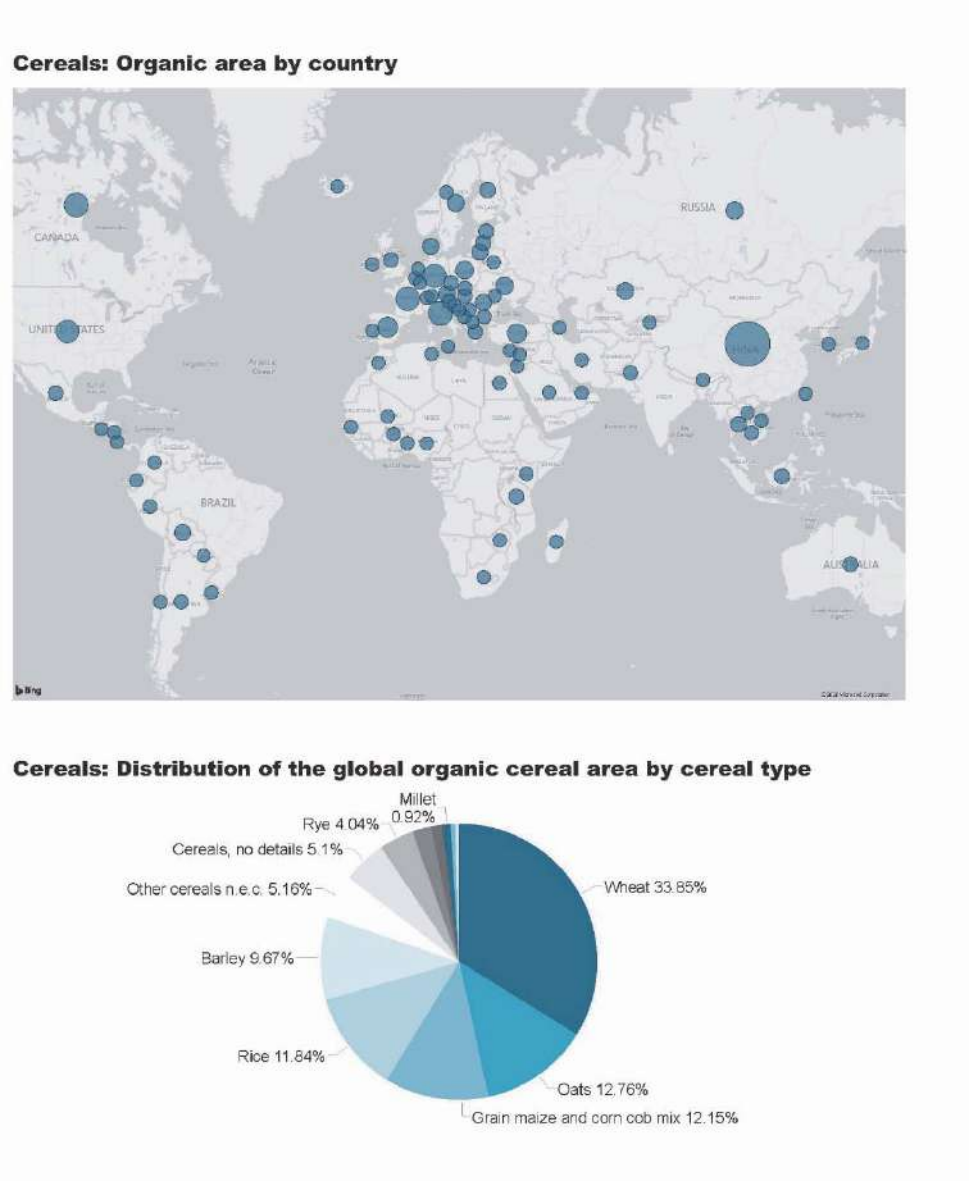


Figure 30: Cereals: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

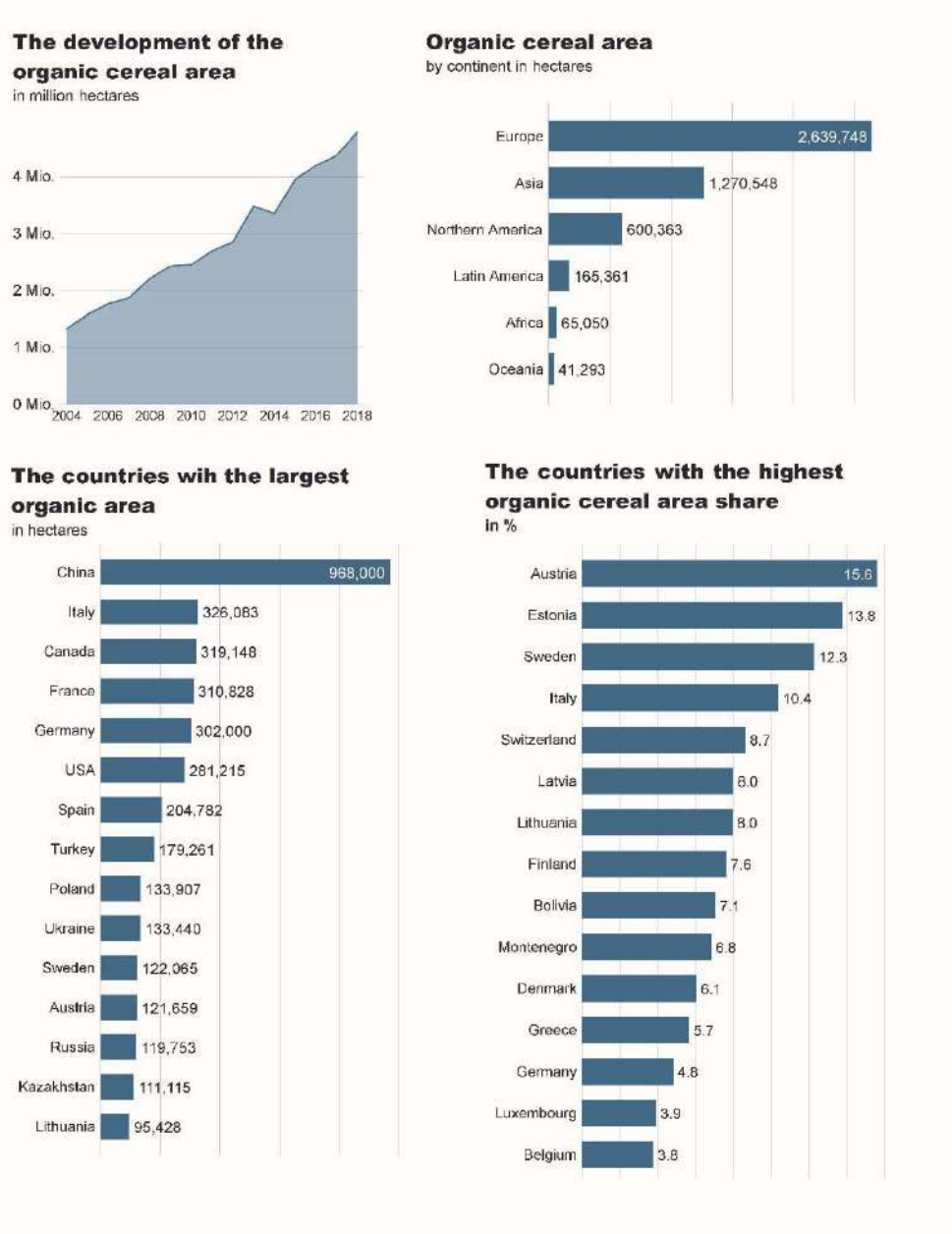


Figure 31: Cereals: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

Table 26: Cereals: Organic area by country 2018

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	24'202	0.2	24'202	
Australia	41'293	0.2		
Austria	121'659	15.6		
Azerbaijan	1'598	0.2		1'598
Belarus	212	0.0	128	84
Belgium	11'474	3.8	8'736	
Bhutan	537	1.0	523	14
Bolivia	87'545	7.0	72'981	14'564
Bosnia and Herzegovina	118	0.1	118	
Bulgaria	16'602	1.0		
Burkina Faso	117	-	117	
Cambodia	19'590	0.6	19'152	438
Canada	319'148	2.3	304'086	
Chile	292	0.1		
China	968'000	0.9	560'000	274'000
Colombia	100	-		
Costa Rica	81	0.2		
Croatia	13'612	2.9	9'145	4'467
Cyprus	856	3.5	586	270
Czech Republic	35'498	2.6	27'700	7'797
Denmark	87'746	6.1	57'566	30'181
Ecuador	1'538	0.2	1'194	344
Egypt	8'946	0.3	8'946	
Estonia	45'591	13.8	36'739	8'854
Finland	66'013	7.6	52'246	13'767
France	310'828	3.3	184'568	126'261
Germany	302'000	4.8		
Greece	47'328	5.7	24'617	22'712
Hungary	33'246	1.4	28'085	5'161
Iceland	47	-	47	
Indonesia	53'974	0.3	53'963	11
Iran	522	0.0	510	12
Ireland	1'661	0.6	1'509	153
Israel	1'387	2.2	1'137	250
Italy	326'083	10.4	245'926	80'156
Japan	2'964	0.2	2'964	
Kazakhstan	111'115	0.7	75'535	35'580
Kenya	486	0.0	214	272
Kyrgyzstan	716	0.1	505	211
Lao	4'598	0.4		
Latvia	50'621	8.0	40'833	
Lebanon	26	-	26	1
Liechtenstein	104	-	104	
Lithuania	95'428	8.0	86'170	9'258
Luxembourg	1'095	3.9	982	113
Madagascar	93	0.1	93	
Mali	44	0.1		
Malta	3	0.1	2	1
Mexico	37'176	0.4		
Moldova	3'541	0.4	2'444	1'097
Montenegro	150	6.8	115	36
Morocco	12	0.0	12	
Netherlands	3'422	2.2	3'105	
Nicaragua	604	0.1	604	
Nigeria	310	0.0	60	250
North Macedonia	1'079	0.7	527	552
Norway	6'481	2.3	5'556	926
Pakistan	31'179	0.2	27'327	3'851
Palestine	36	0.2	16	20
Paraguay	1'127	0.1		

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Peru	12'269	1.0	11'827	
Poland	133'907	1.8	99'095	34'812
Portugal	2'809	1.2	2'437	373
Republic of Korea	1'686	0.2		
Romania	84'927	1.6	45'366	
Russian Federation	119'753	0.3	114'870	4'884
Saudi Arabia	459	0.2	427	32
Senegal	3'693	0.3	117	3'576
Serbia	3'614	0.2	2'612	1'001
Slovakia	20'770	2.9	17'944	2'826
Slovenia	2'435	2.4	2'179	256
South Africa	5	0.0	5	
Spain	204'782	3.4	182'044	22'738
Sweden	122'065	12.3	102'745	19'319
Switzerland	12'429	8.7		
Taiwan	2'937	0.9	2'937	
Tanzania	50'860	0.8	50'860	
Thailand	67'144	0.6	67'051	93
Tunisia	485	0.1		
Turkey	179'261	1.6	140'209	39'053
Ukraine	133'440	0.9		
UAE	2	0.6	2	
United Kingdom	37'059	1.2	34'809	2'249
United States	281'215	0.5		
Uruguay	427	0.1	427	
Viet Nam	2'078	-	1'713	365
Zimbabwe	1	-	1	
World	**4'782'363**	**0.7%**	**2'851'397**	**774'840**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315
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› Citrus fruit

In 2018, about 90'000 hectares or 1 percent of the global citrus fruit area was under organic management.

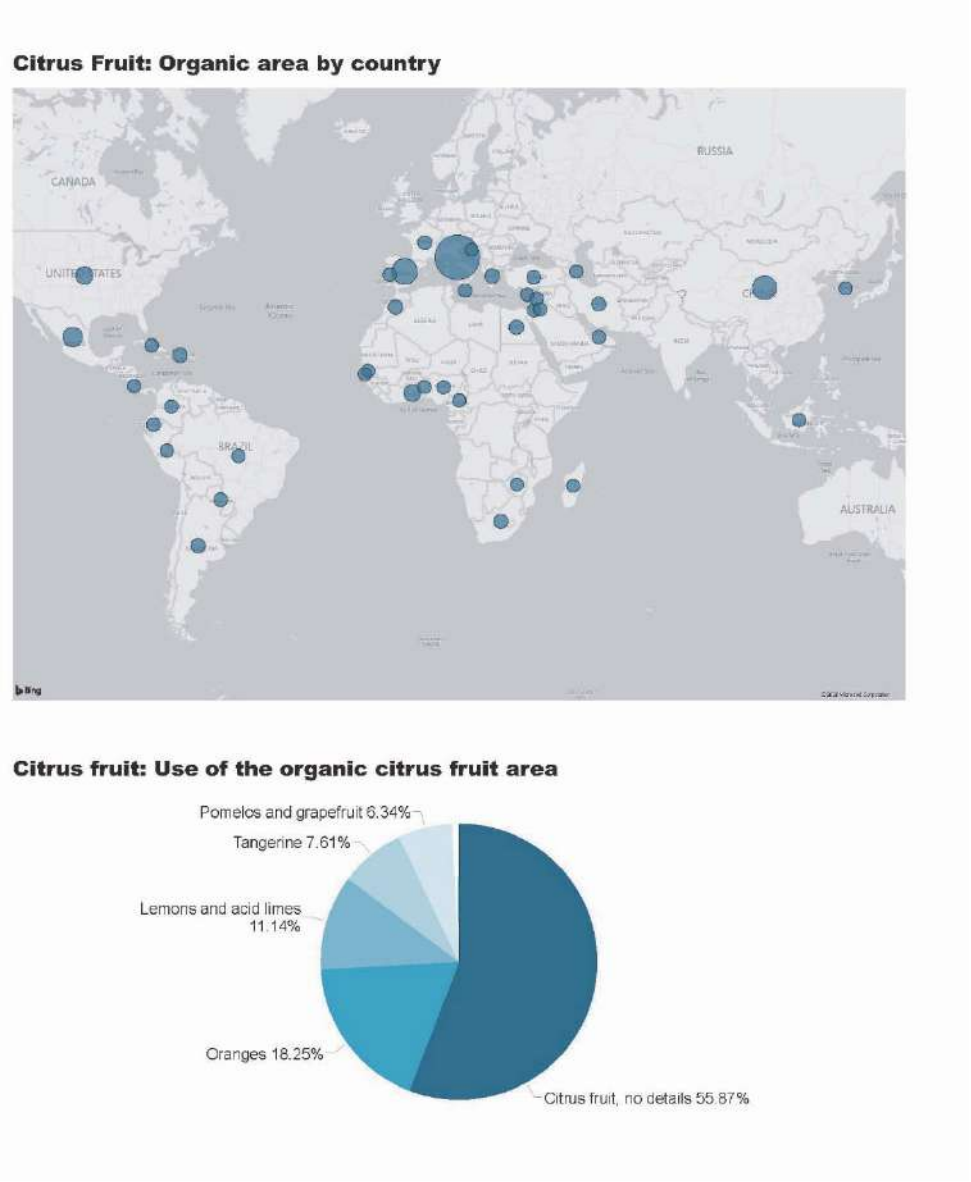

Figure 32: Citrus fruit: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

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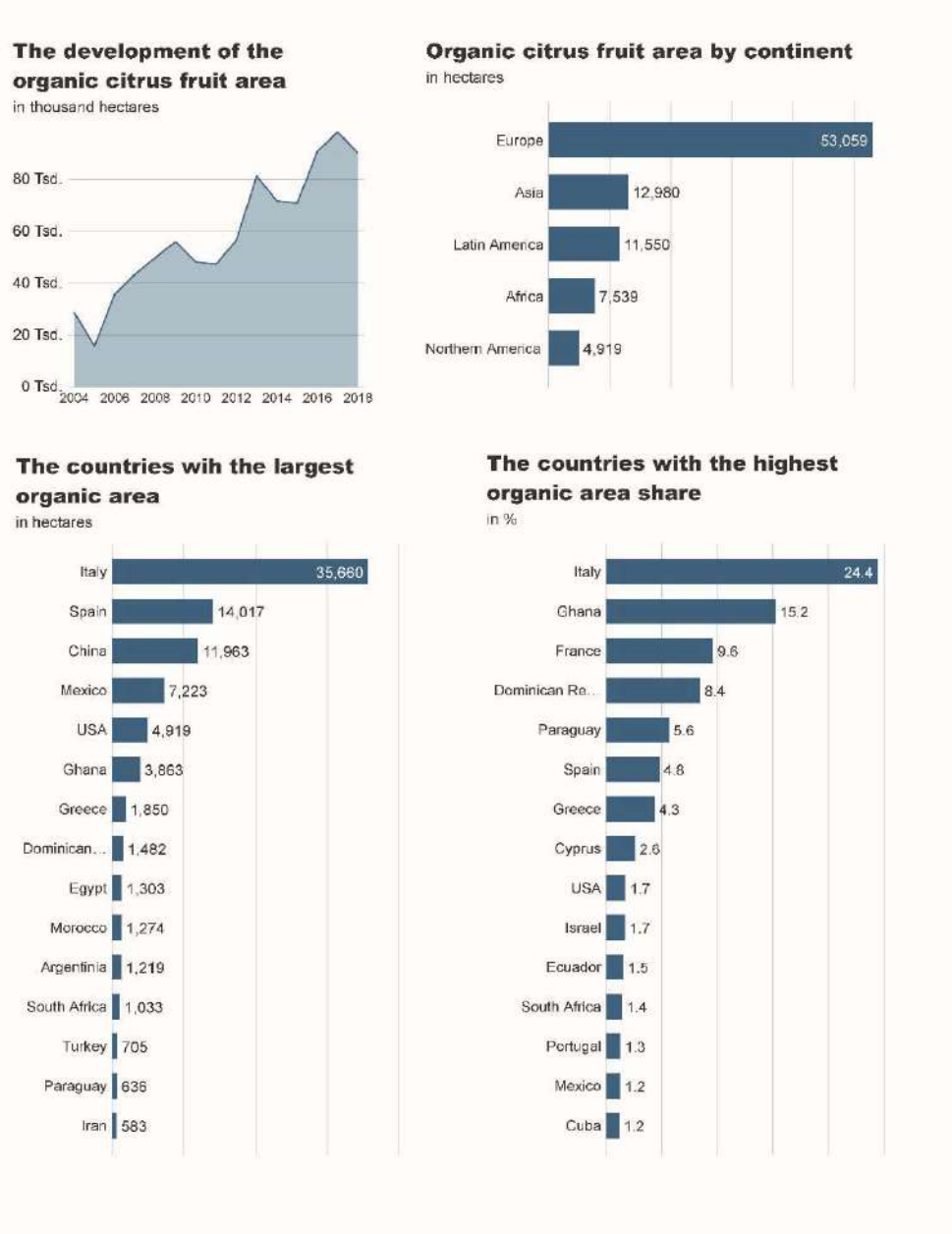

Figure 33: Citrus fruit: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

Table 27: Citrus fruit: Organic area by country 2018

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	1'219	0.9	1'095	
Azerbaijan	21	0.7	2	19
Benin	1	0.0	1	
Brazil	147	0.0		
Cameroon	1	0.0		
China	11'963	0.5	5'994	5'969
Colombia	3	0.0		
Costa Rica	25	0.1		
Croatia	15	0.7	13	3
Cuba	167	1.2	44	123
Cyprus	91	2.6	46	44
Dominican Republic	1'482	8.4		
Ecuador	572	1.5	530	42
Egypt	1'303	0.7	1'303	
France	463	9.6	282	181
Gambia	11	0.0		11
Ghana	3'863	15.2	3'863	
Greece	1'850	4.3	1'162	688
Iran	583	0.4	4	579
Israel	316	1.7	239	77
Italy	35'660	24.4	29'198	6'461
Jordan	13	0.2		
Lebanon	23	0.2	9	14
Madagascar	33	0.2	33	
Mexico	7'223	1.2		
Morocco	1'274	1.0	995	279
Nigeria	2	0.0		2
Palestine	1	0.1	1	
Paraguay	636	5.6		
Peru	75	0.1	56	
Portugal	258	1.3	209	49
Republic of Korea	60	0.3		
Senegal	16	0.2	3	13
South Africa	1'033	1.4	842	190
Spain	14'017	4.8	9'139	4'878
Turkey	705	0.5	227	478
United	4'919	1.7		
Zimbabwe	3	0.0	3	
World	**90'047**	**1.0**	**55'296**	**20'100**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315. Blank cells: No data available.

› Cocoa beans

In 2018, about 322'000 hectares or 2.7% of the global cocoa area was under organic management.

Figure 34: Cocoa: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

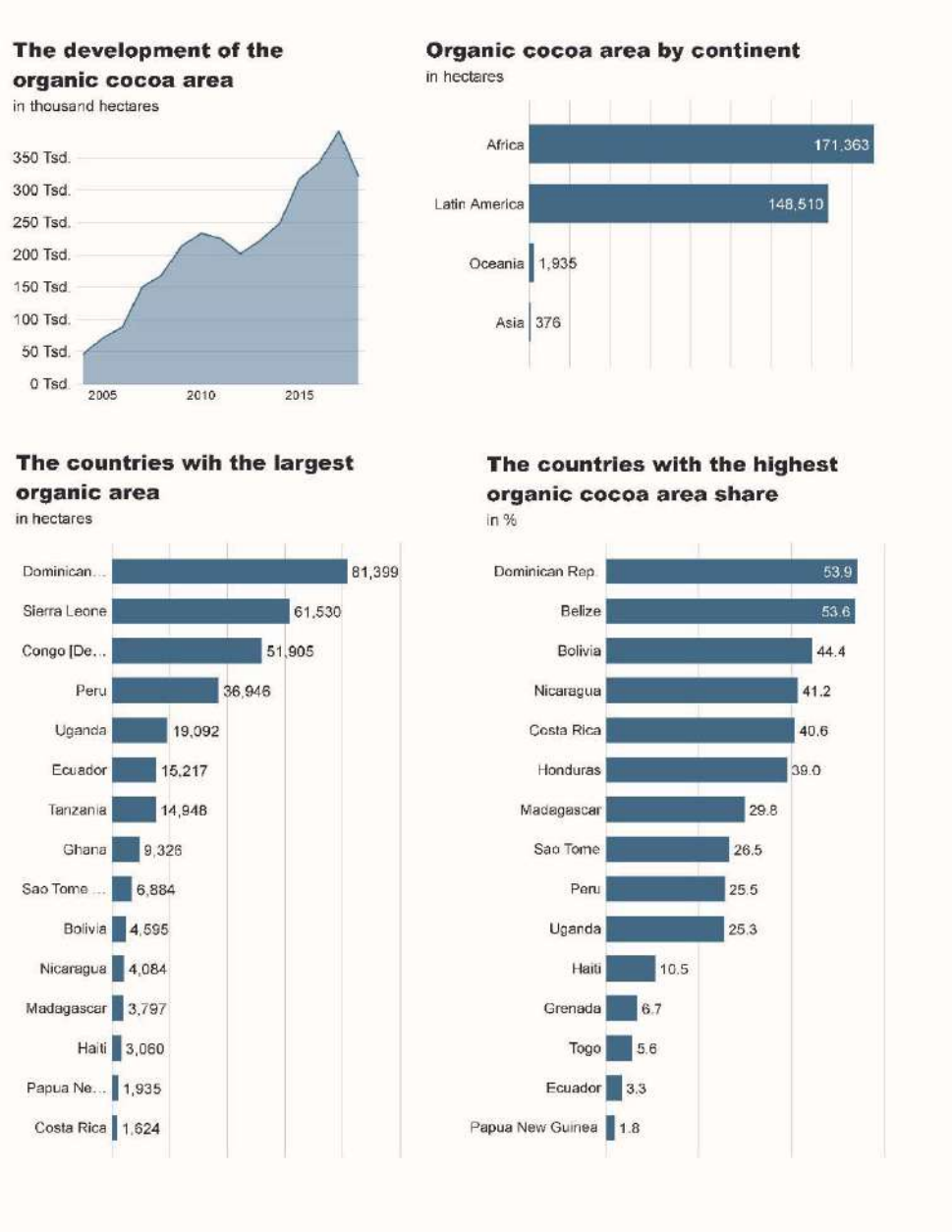

Figure 35: Cocoa: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

Table 28: Cocoa beans: Organic area by country 2018

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Belize	220	53.6		
Bolivia	4'595	44.4	3'976	619
Cameroon	523	0.1		
Colombia	381	0.3		
Costa Rica	1'624	40.6		
Côte d'Ivoire	1'347	0.0	1'347	
Democratic Republic of the Congo	51'905	-	50'852	1'053
Dominican Republic	81'399	53.9		
Ecuador	15'217	3.3	12'739	2'478
El Salvador	2	0.2		2
Ghana	9'326	0.6	8'719	607
Grenada	84	6.7		
Haiti	3'060	10.5	3'060	
Honduras	753	39.0		
Indonesia	376	0.0	360	17
Madagascar	3'797	29.8	3'797	
Mexico	146	0.2		
Nicaragua	4'084	41.2	3'050	1'034
Nigeria	700	0.1		700
Papua New Guinea	1'935	1.8	1'935	
Peru	36'946	25.5	36'946	
Sao Tome and Principe	6'884	26.5	6'884	
Sierra Leone	61'530	151.7	61'530	
Tanzania	14'948	124.0	14'948	
Togo	1'312	5.6		
Uganda	19'092	25.3	17'190	1'902
World	**322'184**	**2.7**	**227'330**	**8'412**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315
Blank cells: No data available.

Please note that the decrease of the organic cocoa area is mainly due to the fact that the Dominican Republic reported 77'000 hectares less than for 2016 (latest available figure prior to 2018).

For more information on cocoa production (organic and other Voluntary Sustainability Standards - VSS), please see the report "The State of Sustainable Markets – Statistics and Emerging Trends 2019."[1]

[1] Willer, Helga, Gregory Sampson, Vivek Voora, Duc Dang, Julia Lernoud (2019): The State of Sustainable Markets – Statistics and Emerging Trends 2019. International Trade Centre (ITC), Geneva. Available at: http://www.vss.fibl.org/de/vss.html.
For interactive online graphics see the Sustainability Map at https://www.sustainabilitymap.org/trends

› Coffee

In 2018, around 701'000 hectares or 6.5% of the global coffee area was under organic management.

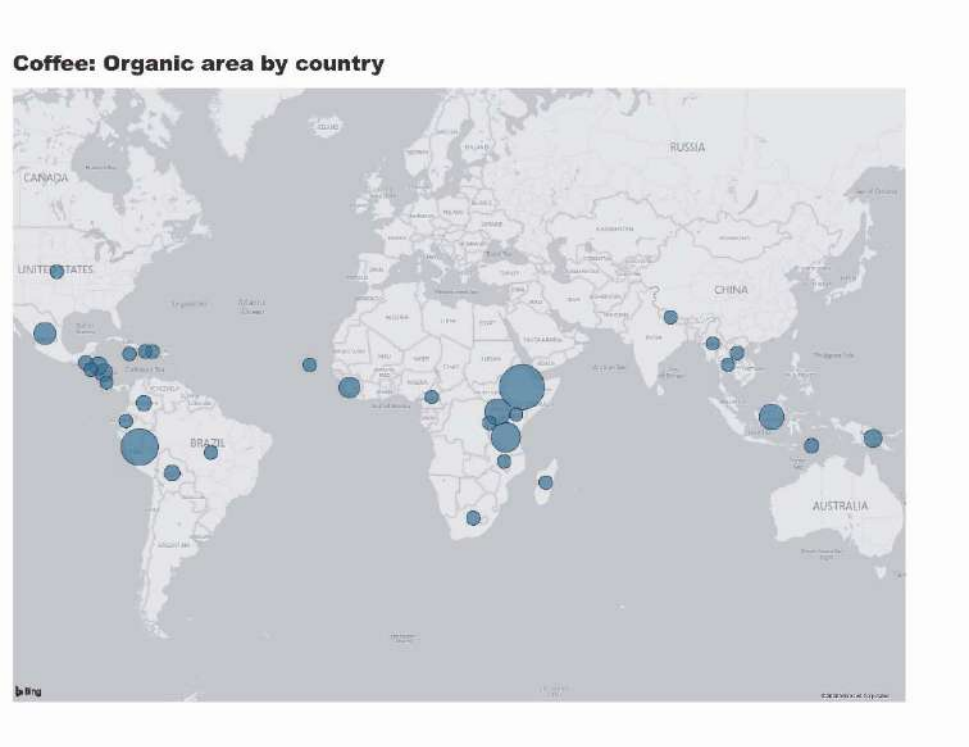

Figure 36: Coffee: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

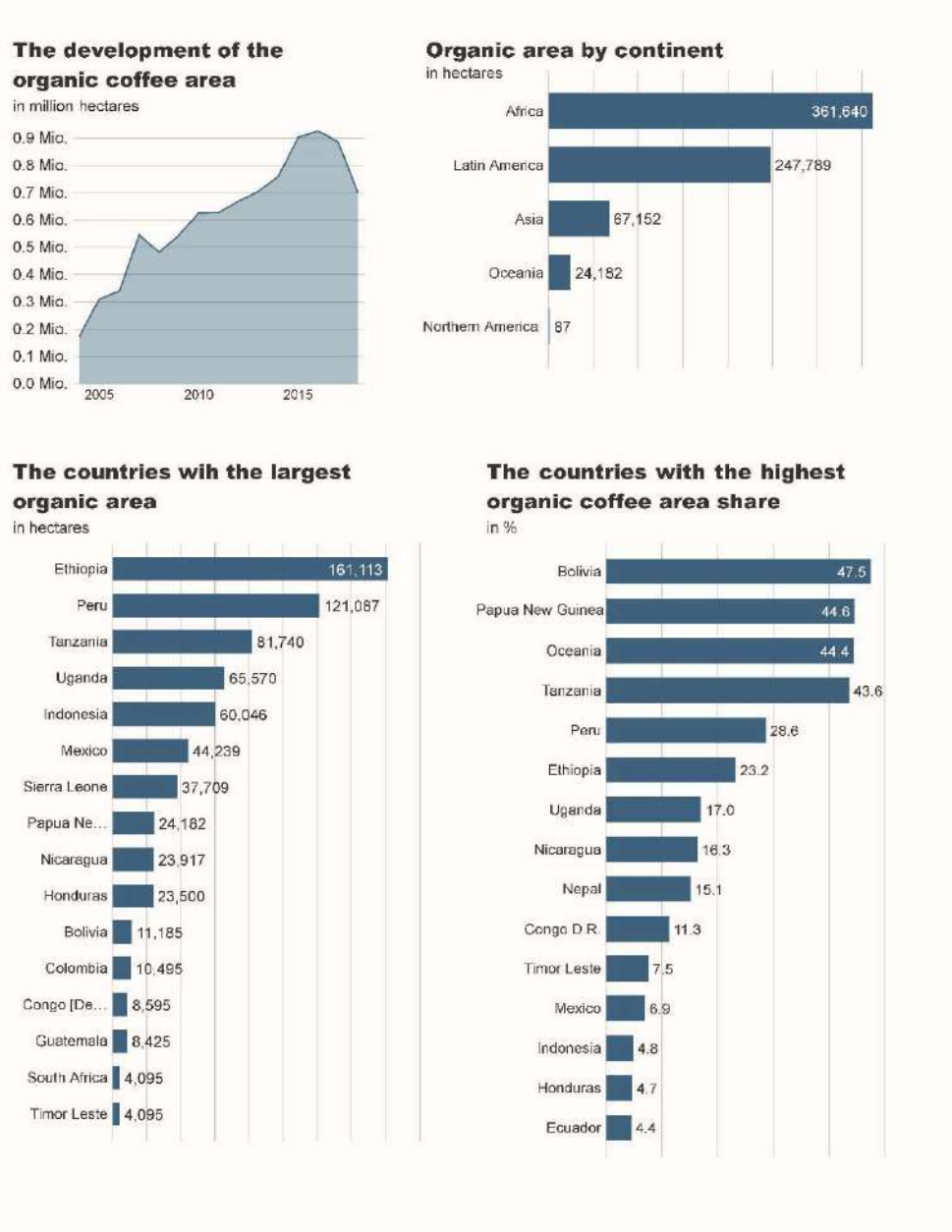

Figure 37: Coffee: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

Table 29: Coffee: Organic area by country 2018

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Bolivia	11'185	47.4	9'709	1'476
Brazil	689	0.0		
Cameroon	203	0.2		
Cape Verde	495	-	495	
Colombia	10'495	1.3		
Costa Rica	649	0.8		
Congo D.R.	8'595	11.3	8'595	
Dominican Republic	329	0.3		
Ecuador	1'656	4.4	1'578	78
El Salvador	1'493	1.2	1'440	53
Ethiopia	161'113	23.2	159'866	1'247
Guatemala	8'425	3.0	6'925	1'500
Haiti	122	0.2	122	
Honduras	23'500	4.7		
Indonesia	60'046	4.8	59'828	218
Jamaica	2	0.0		2
Kenya	251	0.2	250	1
Lao	1'363	1.7		
Madagascar	652	0.8	652	
Malawi	114	2.3	114	
Mexico	44'239	6.9		
Myanmar	26	0.2	26	
Nepal	398	15.1		
Nicaragua	23'917	16.3	21'147	2'770
Papua New Guinea	24'182	44.6	21'233	2'950
Peru	121'087	28.6	121'087	
Rwanda	676	1.7	665	10
Sao Tome and Principe	429	-	429	
Sierra Leone	37'709	-	37'709	
South Africa	4'095	0.0	4'095	
Tanzania	81'740	43.6	81'740	
Thailand	1'224	2.7	1'224	
Timor-Leste	4'095	7.5	4'095	
Uganda	65'570	17.0		
United States	87	3.0		
World	**700'850**	**6.5%**	**543'023**	**10'305**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315
Blank cells: No data available.

Please note that the huge drop in the 2018 coffee area is due to the new data source. A direct year-to-year comparison is therefore not possible; neither for Mexico nor for the global coffee area.

For more information on coffee production (organic and other Voluntary Sustainability Standards - VSS), please see the report "The State of Sustainable Markets – Statistics and Emerging Trends 2019."[1]

[1] Willer, Helga, Gregory Sampson, Vivek Voora, Duc Dang, Julia Lernoud (2019): The State of Sustainable Markets – Statistics and Emerging Trends 2019. International Trade Centre (ITC), Geneva. Available at: http://www.vss.fibl.org/de/vss.html.
For interactive online graphics see the Sustainability Map at https://www.sustainabilitymap.org/trends

› Dry pulses[1]

In 2018, around 727'000 hectares or 0.8% of the global dry pulses area was under organic management.

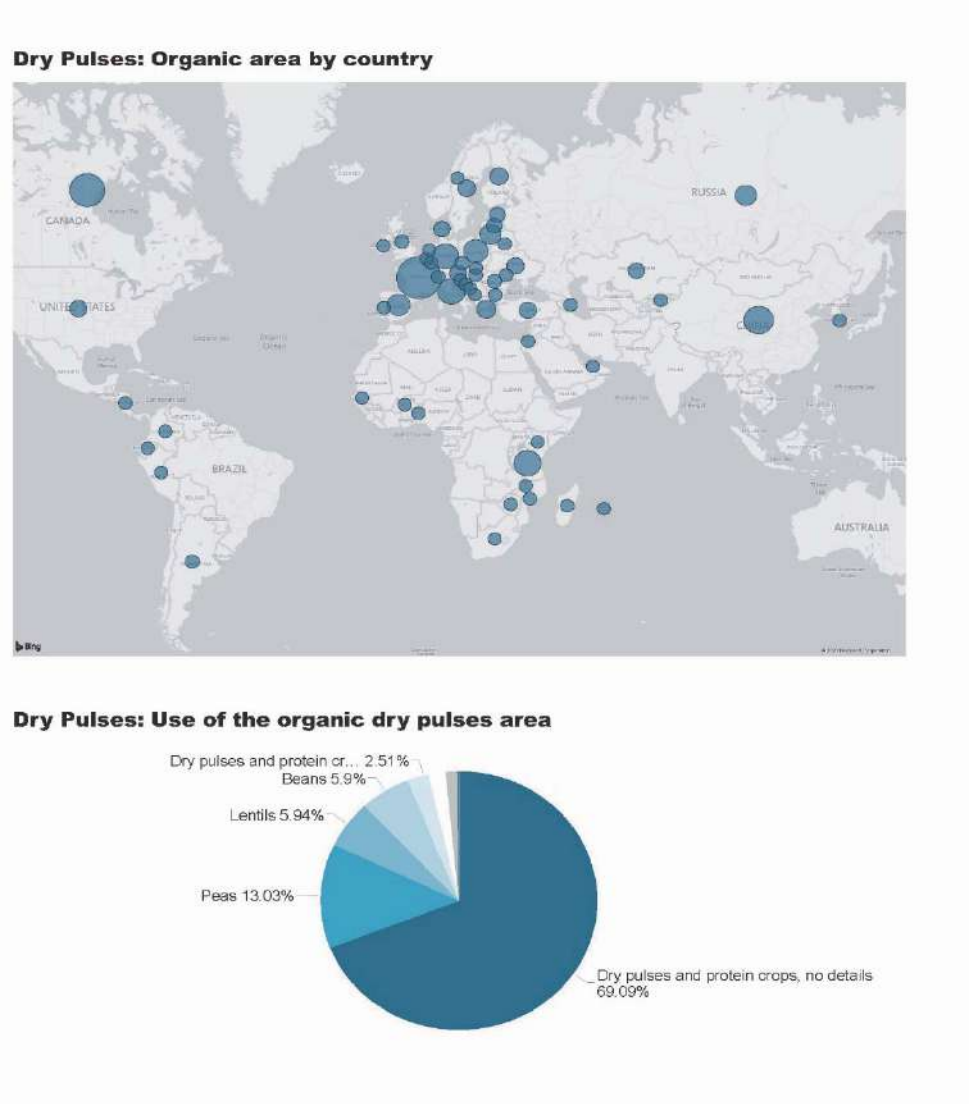

Figure 38: Dry Pulses: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

[1] In past editions of "The World of Organic Agriculture", this category was called "Protein crops". In order to harmonize nomenclature with Eurostat, we changed this to "Dry pulses."

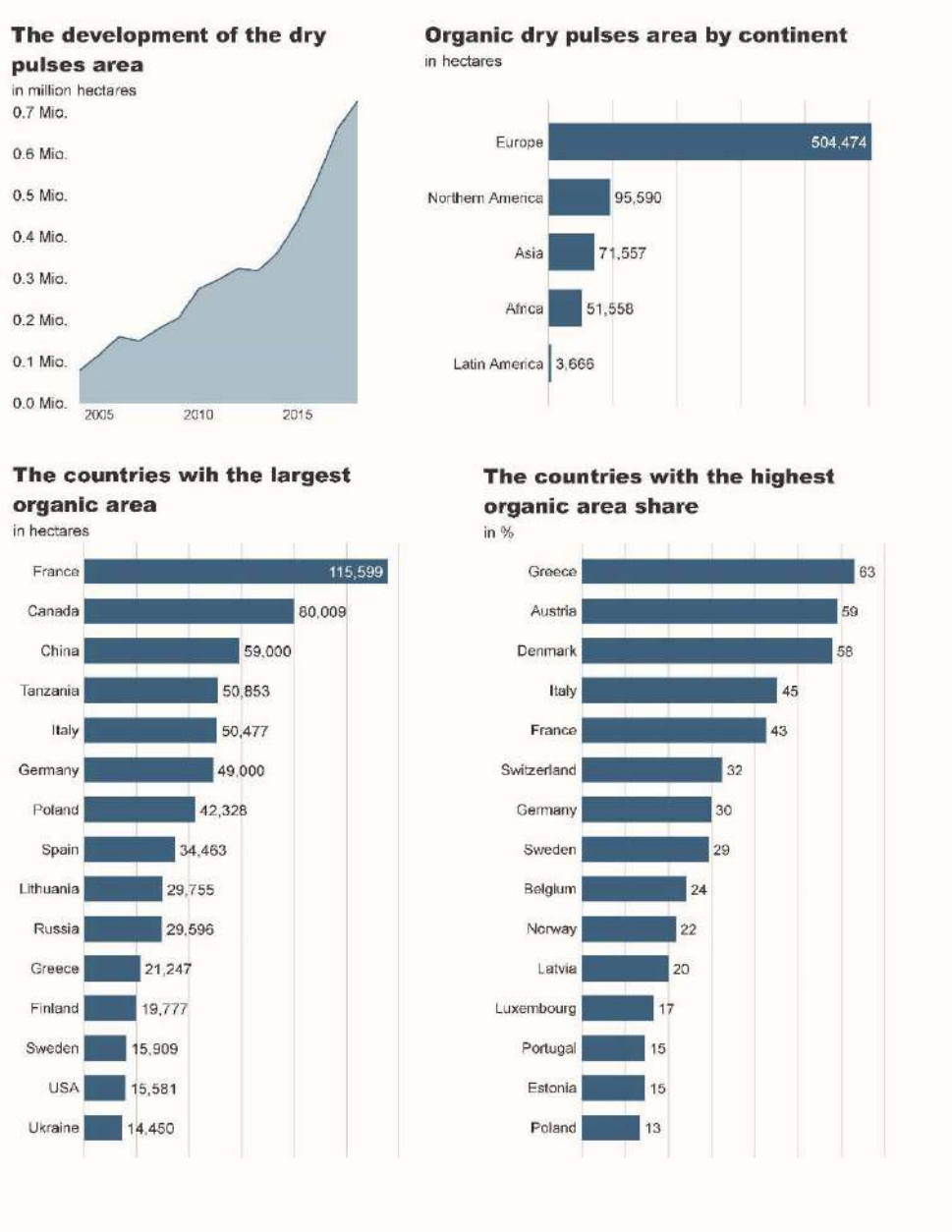

Figure 39: Dry Pulses: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

Table 30: Dry pulses: Organic area by country 2018

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	2'948	0.5	2'867	
Austria	13'472	58.9		
Azerbaijan	6	0.0	2	4
Belarus	127	0.1	76	52
Belgium	416	24.1	304	
Benin	1	0.0	1	
Bosnia and Herzegovina	1	0.0	1	
Bulgaria	1'238	1.5		
Burkina Faso	4	0.0	4	
Canada	80'009	1.8	80'009	
China	59'000	2.0	44'000	15'000
Colombia	1	0.0		
Croatia	90	3.4	50	40
Czech Republic	3'882	8.7	2'979	903
Denmark	11'897	57.8	5'177	6'719
Ecuador	22	0.0	15	7
Estonia	9'526	14.5	6'990	2'537
Finland	19'777	-	13'917	5'860
France	115'599	42.6	80'773	34'826
Germany	49'000	29.8		
Greece	21'247	63.0	11'941	9'306
Hungary	2'719	13.0	2'457	261
Ireland	227	1.7	190	37
Israel	68	1.0	68	
Italy	50'477	45.2	40'518	9'959
Kazakhstan	11'782	1.3	2'895	8'887
Kenya	215	0.0	215	
Kyrgyzstan	630	0.6	630	0
Latvia	9'659	20.0	7'852	
Lithuania	29'755	12.5	24'130	5'626
Luxembourg	103	16.6	93	10
Madagascar	187	0.2	187	
Malawi	1	0.0	1	
Mauritius	0	0.0	0	
Moldova	1'133	3.9	950	183
Montenegro	1	0.1	1	
Mozambique	1	0.0	1	
Netherlands	144	6.7	142	
Nicaragua	693	0.3	693	
Norway	566	21.7	465	101
Peru	3	0.0	3	
Poland	42'328	13.4	28'272	14'056
Portugal	664	14.6	598	66
Republic of Korea	64	0.5		
Romania	4'994	4.2	2'755	
Russian Federation	29'596	1.4	28'613	983

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Senegal	228	0.1		228
Slovakia	1'681	13.2	1'639	42
Slovenia	93	7.1	78	15
South Africa	37	0.1	37	
Spain	34'463	6.6	29'847	4'617
Sweden	15'909	29.3	11'858	4'051
Switzerland	1'706	32.4		
Tanzania	50'853	2.4	50'853	
Turkey	14'065	1.7	7'803	6'262
Ukraine	14'450	2.9		
United Arab Emirates	7	0.0	7	
United Kingdom	3'468	1.6	3'091	378
United States	15'581	0.8		
Zimbabwe	32	0.1	32	
World	**726'845**	**0.8%**	**496'079**	**131'015**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315
Blank cells: No data available

Please note that the 2017 data provided for dry pulses (total area) are different from what we communicated in previous editions of this yearbook. This is due to the fact that for China the 2017 data were totally revised.

Organic Temperate Fruit ›

In 2018, almost 224'000 hectares or 1.9% of the global temperate fruit area was under organic management.

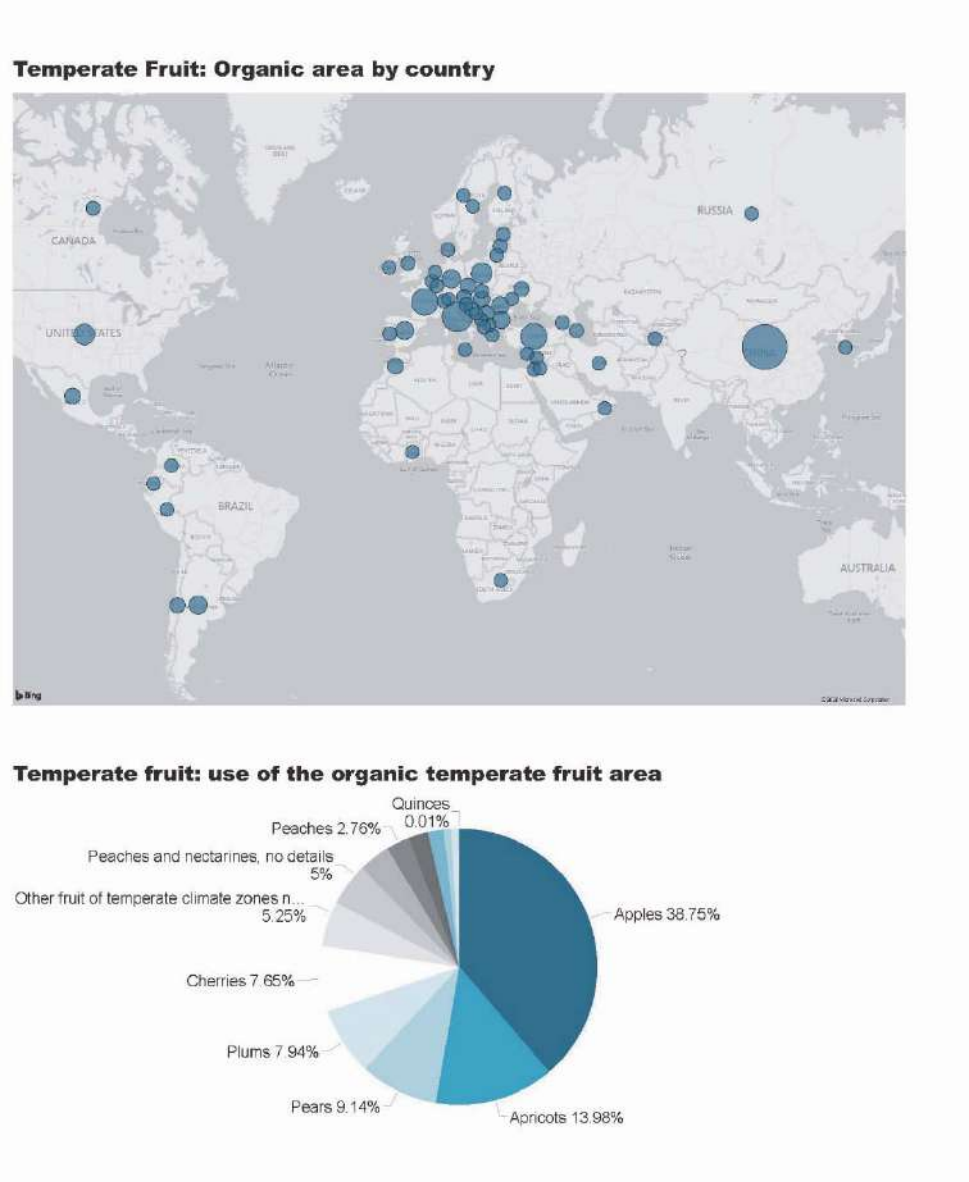

Figure 40: Temperate Fruit: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

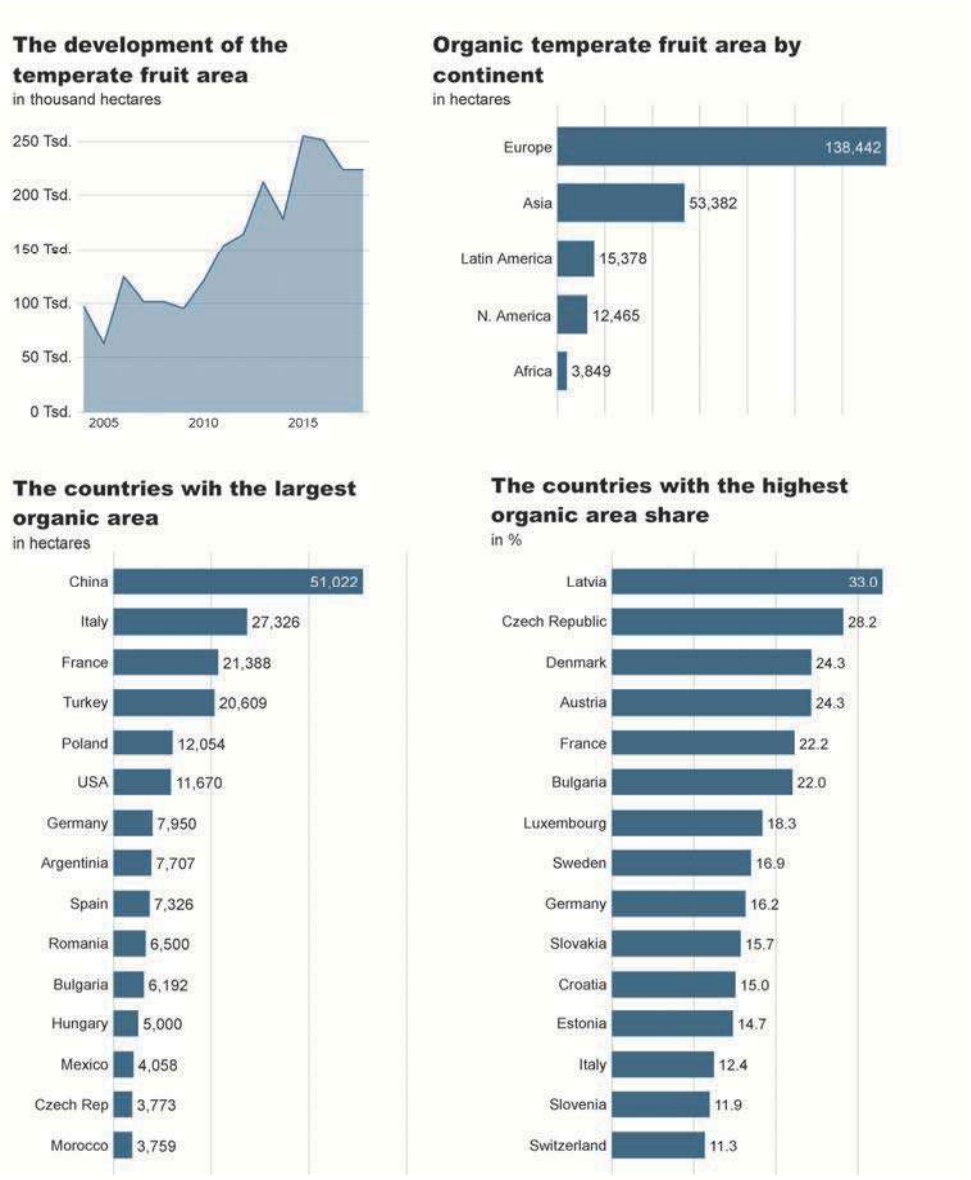

Figure 41: Temperate Fruit: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

Table 31: Temperate fruit: Organic area by country 2018

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	4	0.0		4
Argentina	7'707	8.2	2'868	
Austria	2'325	24.3		
Azerbaijan	754	1.4	112	642
Belgium	751	4.0	469	
Bosnia and Herzegovina	2	0.0	2	0
Bulgaria	6'192	22.0		
Canada	795	3.8	795	
Chile	2'844	2.7		
China	51'022	0.8	31'013	20'009
Colombia	1	0.0		
Croatia	2'228	15.0	1'447	782
Cyprus	176	9.4	94	82
Czech Republic	3'773	28.2	3'271	502
Denmark	559	24.3	361	198
Ecuador	1	0.0	1	
Estonia	449	14.7	397	54
Finland	83	11.2	74	9
France	21'388	22.2	12'896	8'493
Georgia	855	5.1	855	
Germany	7'950	16.2		
Greece	825	1.0	480	345
Hungary	5'000	6.9	1'882	3'117
Iran	2	0.0	2	
Ireland	47	6.8	43	4
Israel	58	0.4	45	12
Italy	27'326	12.4	18'455	8'871
Latvia	1'309	33.0	724	
Lebanon	89	0.3	42	47
Liechtenstein	2	0.0	2	
Lithuania	997	6.2	880	120
Luxembourg	60	18.3	47	13
Mexico	4'058	4.1		
Moldova	177	0.2	98	78
Montenegro	49	3.8	35	13
Morocco	3'759	3.9	3'568	191
Netherlands	479	2.7	419	
North Macedonia	248	1.4	106	141
Norway	225	10.9	181	45
Oman	4	0.0		
Peru	768	4.1	692	
Poland	12'054	4.9	8'893	3'160
Portugal	999	2.4	817	183
Republic of Korea	130	0.2		
Romania	6'500	4.8	3'847	
Russian Federation	41	0.0		41

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Serbia	2'873	2.1	2'193	680
Slovakia	550	15.7	547	3
Slovenia	374	11.9	202	172
South Africa	90	0.2	64	26
Spain	7'326	3.6	4'290	3'036
Sweden	269	16.9	245	25
Switzerland	706	11.3		
Tajikistan	468	0.6	247	220
Turkey	20'609	4.0	11'100	9'511
Ukraine	2'500	1.5		
United Kingdom	1'017	5.2	983	35
United States	11'670	4.2		
World	**223'516**	**1.9%**	**115'786**	**60'866**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315
Blank cells: No data available.

Further reading

Granatstein, David, Elizabeth Kirby, Harold Ostenson, and Helga Willer (2015) Global situation for organic tree fruits. Scientia Horticulturae. Available online 18 December 2015 doi:10.1016/j.scienta.2015.12.008

› Fruit: Tropical and subtropical fruit

In 2018, around 274'000 hectares or 1.1% of the global tropical and subtropical fruit area was under organic management.

Tropical and subtropical fruit: Organic area by country

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

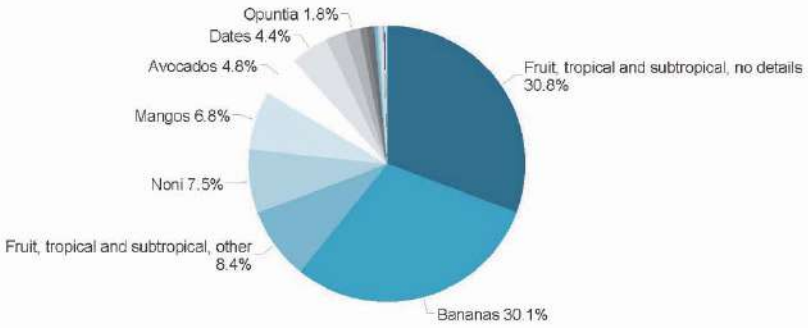

Figure 42: Tropical and subtropical fruit: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

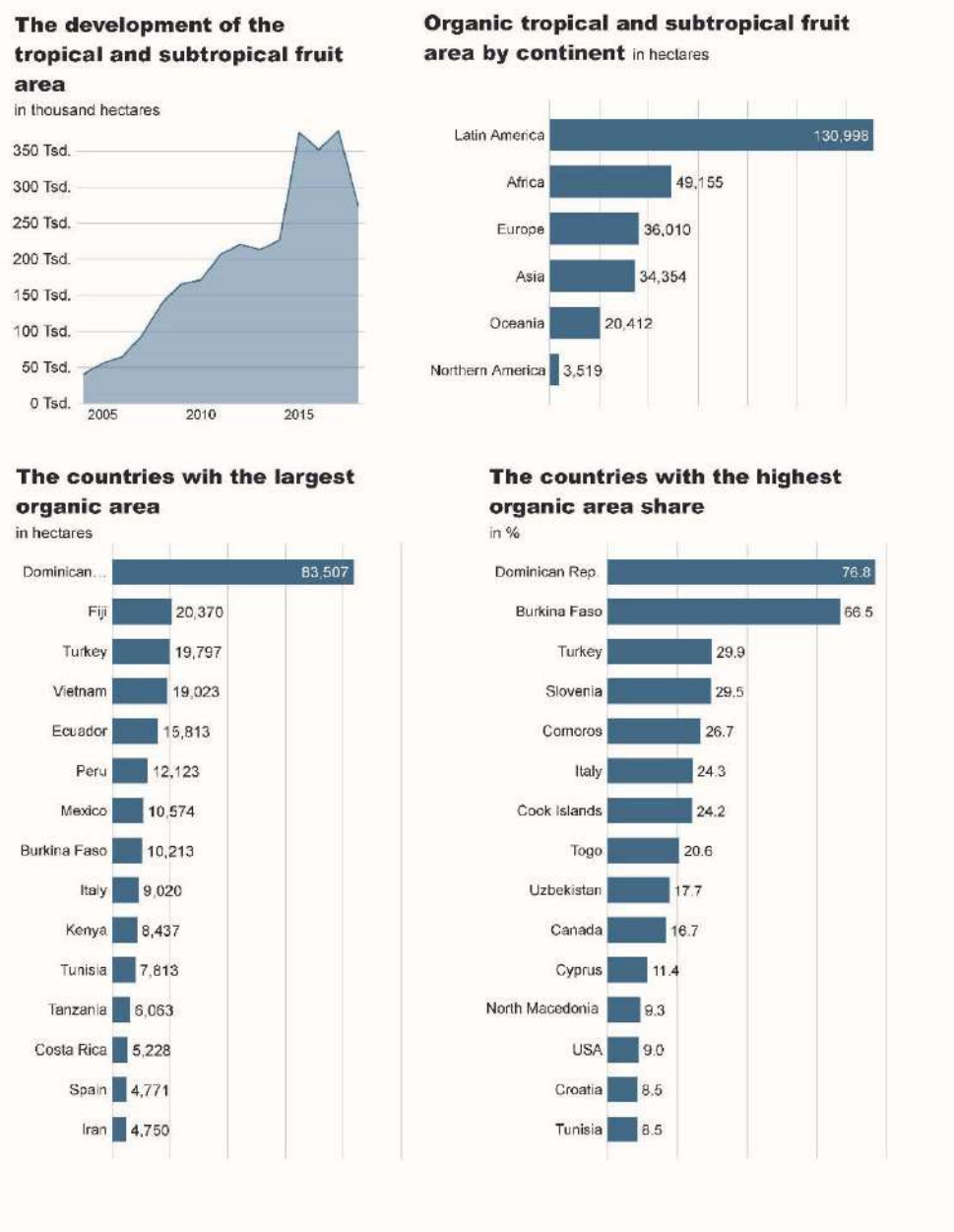

Figure 43: Tropical and subtropical fruit: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

Table 32: Tropical and subtropical fruit: Organic area by country 2018

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Algeria	564	0.3	502	
Argentina	84	0.9	84	
Azerbaijan	495	4.3	180	315
Benin	268	2.0	268	
Bolivia	40	0.1	38	2
Bulgaria	36	-		
Burkina Faso	10'213	66.5	10'213	
Burundi	164	0.1	164	
Cameroon	350	0.1		
Canada	1	16.7	1	
Chile	116	0.3		
Colombia	1'746	0.2		
Comoros	1'123	26.7	1'123	
Cook Islands	24	24.2		24
Costa Rica	5'228	4.9		
Côte d'Ivoire	1'943	0.3	1'923	20
Croatia	65	8.5	38	27
Cuba	104	0.1	48	56
Cyprus	186	11.4	65	121
Dominican Republic	83'507	76.8		
Ecuador	15'813	5.3	13'148	2'665
Egypt	542	0.2	542	
El Salvador	10	0.2	10	
Fiji	20'370	-	20'370	
France	121	2.7	85	36
French Guiana (France)	194	8.3	118	76
French Polynesia	18	4.0	18	
Ghana	1'173	0.3	696	477
Greece	1'029	6.7	722	307
Guadeloupe (France)	49	1.4	34	15
Guatemala	35	0.0	35	
Guinea	10	0.0		
Guinea-Bissau	59	0.3	59	
Indonesia	888	0.2	888	
Iran	4'750	1.6	4'619	131
Israel	859	3.8	770	89
Italy	9'020	24.3	6'305	2'715
Jordan	167	3.9		
Kenya	8'437	6.3	3'272	5'165
Lebanon	9	0.3	8	1
Madagascar	3'002	1.4	2'986	17
Mali	709	0.8		
Martinique (France)	145	2.6	125	20
Mexico	10'574	1.9		
Montenegro	2	0.1	1	0
Mozambique	696	0.7	696	

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Nicaragua	1'128	6.0	1'106	23
North Macedonia	4	9.3	2	2
Pakistan	2'117	0.6	2'117	
Palestine	5	0.1	1	4
Peru	12'123	4.2	11'483	
Philippines	2'842	0.2	2'842	
Portugal	937	4.4	642	296
Puerto Rico	8	0.1		
Réunion (France)	337	6.2	237	100
Rwanda	525	0.1	525	
Senegal	1'734	7.6	1'523	211
Slovenia	41	29.5	28	14
South Africa	25	0.1	25	
Spain	4'771	7.7	3'118	1'653
Sri Lanka	591	0.4	591	
Sudan	50	0.0	50	
Suriname	94	3.5	94	
Taiwan	1'381	1.5	1'381	
Tanzania	6'063	0.7	6'063	
Togo	499	20.6		
Tunisia	7'813	8.5		
Turkey	19'797	29.9	14'582	5'215
Uganda	2'072	0.2	1'884	188
United Arab Emirates	423	0.6	422	1
United States	3'519	9.0		
Uzbekistan	806	17.7	806	
Viet Nam	19'023	8.0	18'823	200
Zambia	785	3.6	785	
World	**274'448**	**1.1%**	**139'282**	**20'184**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

Please note that the major drop of organic tropical and subtropical fruit is due to the fact that for Mexico, due to the change of the data source, more than 100'000 hectares less were reported.

› Grapes

In 2018, around 422'000 hectares or 6.1% of the global grapes area was under organic management.

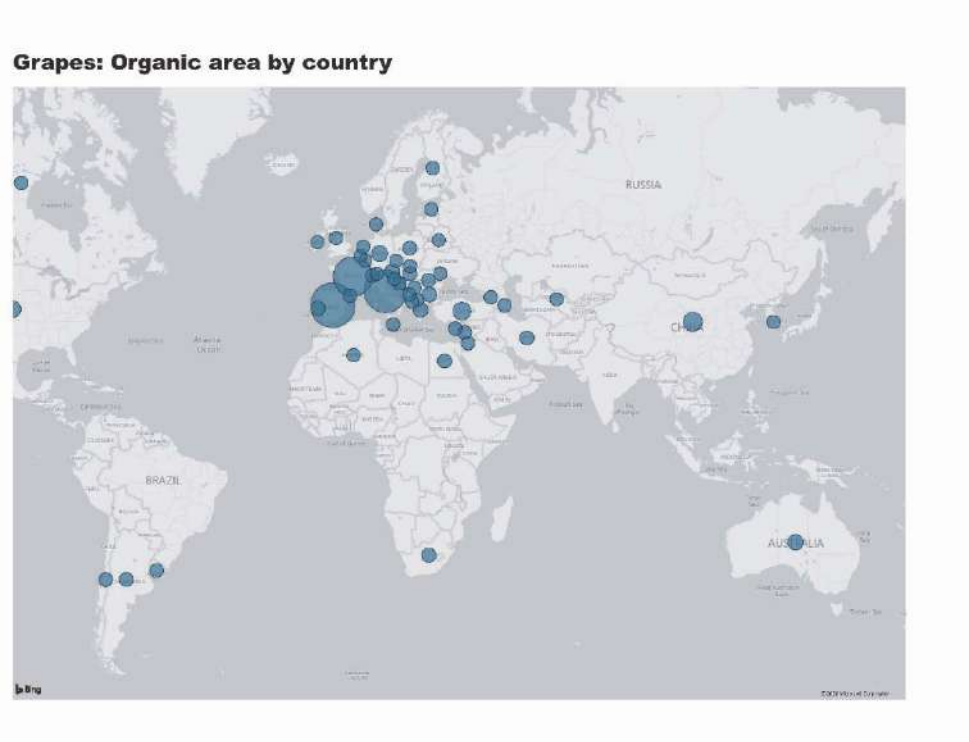

Figure 44: Grapes: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

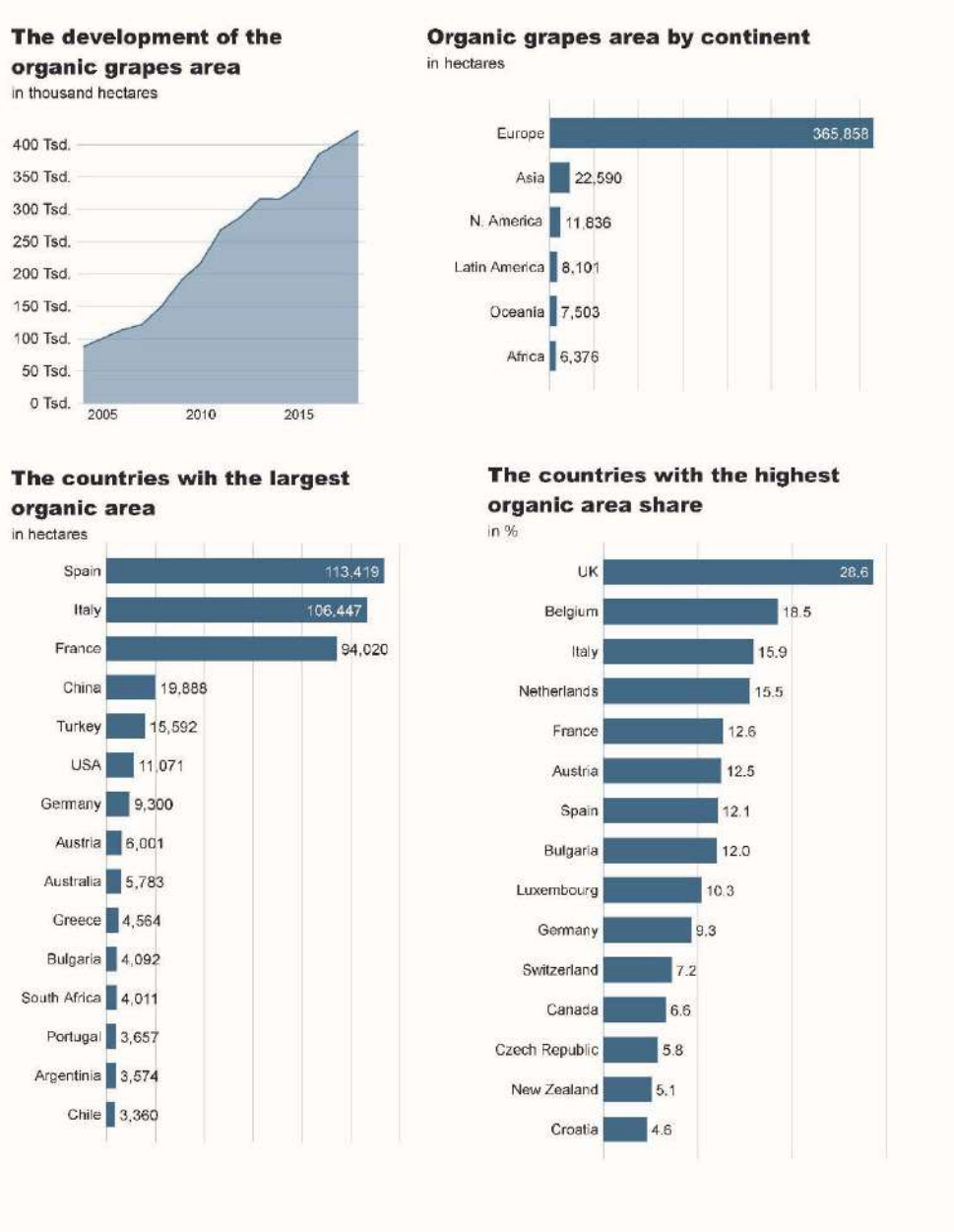

Figure 45: Grapes: Organic Area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

Table 33: Grapes: Organic area by country 2018

Country	Organic area [ha]	Organic area [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	2	0.0		2
Algeria	208	0.3	208	
Andorra	2	0.0	2	
Argentina	3'574	1.6	3'574	
Australia	5'783	4.2		
Austria	6'001	12.5		
Azerbaijan	41	0.3	1	40
Belgium	46	18.5	19	
Bulgaria	4'092	12.0		
Canada	765	6.6	765	
Chile	3'360	1.6		
China	19'888	2.6	15'395	4'493
Croatia	1'002	4.6	869	133
Cyprus	263	4.5	219	44
Czech Republic	911	5.8	837	73
Denmark	52	0.0	25	27
Egypt	2'157	2.8	2'157	
Estonia	3	0.0	3	1
Finland	1	0.0	1	0
France	94'020	12.6	65'298	28'723
Georgia	130	0.3	55	75
Germany	9'300	9.3		
Greece	4'564	4.5	3'459	1'105
Hungary	1'759	2.6	945	814
Iran (Islamic Republic of)	2'012	1.4	2'012	
Ireland	3	0.0	1	2
Italy	106'447	15.9	74'399	32'049
Jordan	10	0.3		
Lebanon	354	4.2	349	5
Liechtenstein	4	0.0	4	
Luxembourg	130	10.3	90	40
Malta	8	0.5	7	1
Mexico	1'164	3.8		
Moldova	5	0.0	4	1
Netherlands	11	15.5	11	
New Zealand	1'720	5.1		
North Macedonia	111	0.5	11	100
Poland	276	0.0	184	92
Portugal	3'657	2.0	2'610	1'047
Republic of Korea	70	0.5		
Romania	2'169	1.2	1'652	
Serbia	43	0.2	9	34
Slovakia	141	1.7	123	18
Slovenia	657	4.1	462	195
South Africa	4'023	3.4	2'373	1'650
Spain	113'419	12.1	89'798	23'621
Switzerland	1'063	7.2		
Turkey	15'592	3.7	7'790	7'802
United Kingdom	104	28.6	94	9
United States of America	11'071	2.7		
Uruguay	3	0.0	3	
Uzbekistan	85	0.1	85	
World	**422 277**	**6.1%**	**275 904**	**102 195**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315
Blank cells: Not data

› Oilseeds

In 2018, almost 1.4 million hectares or 0.6% of the global oilseeds area was under organic management.

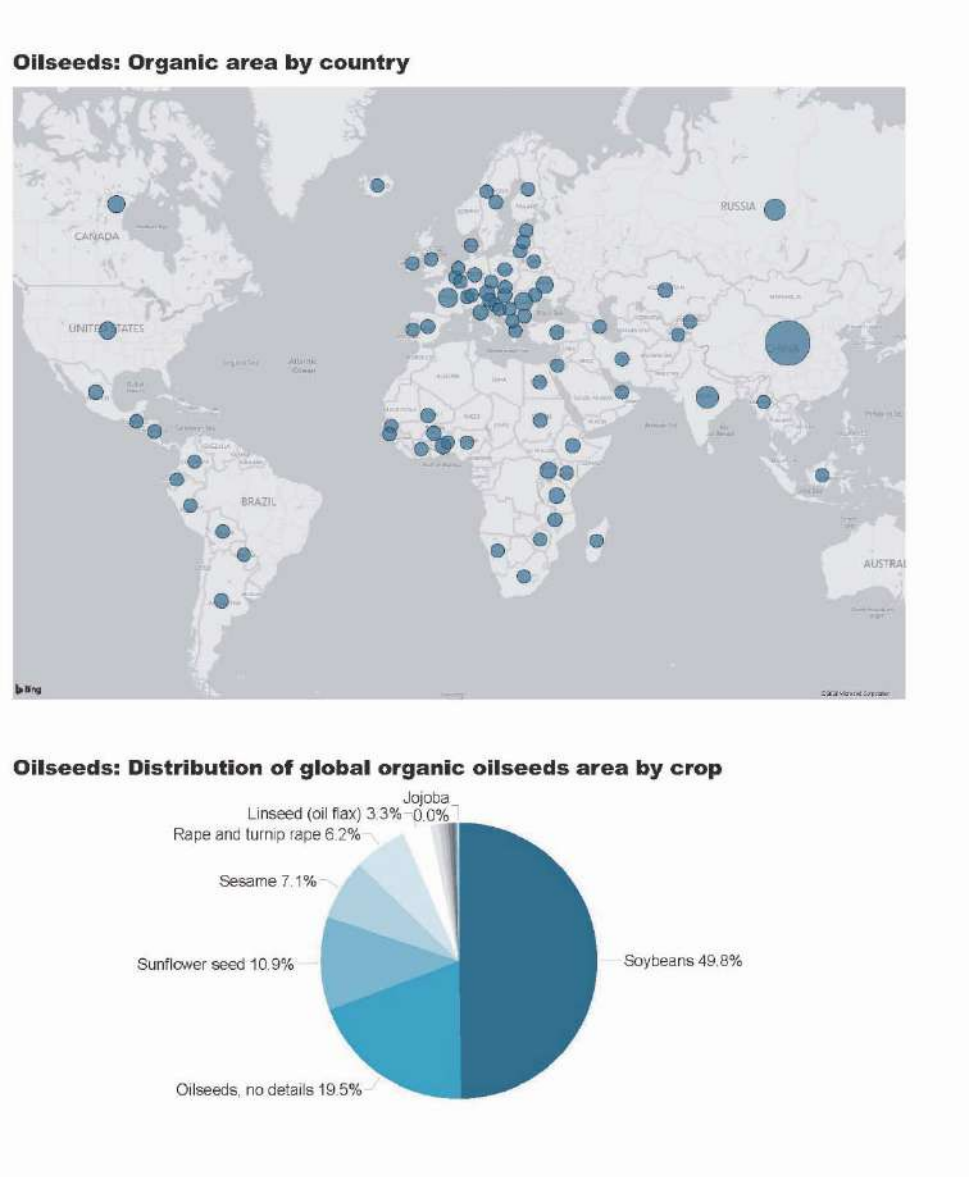

Figure 46: Oilseeds: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

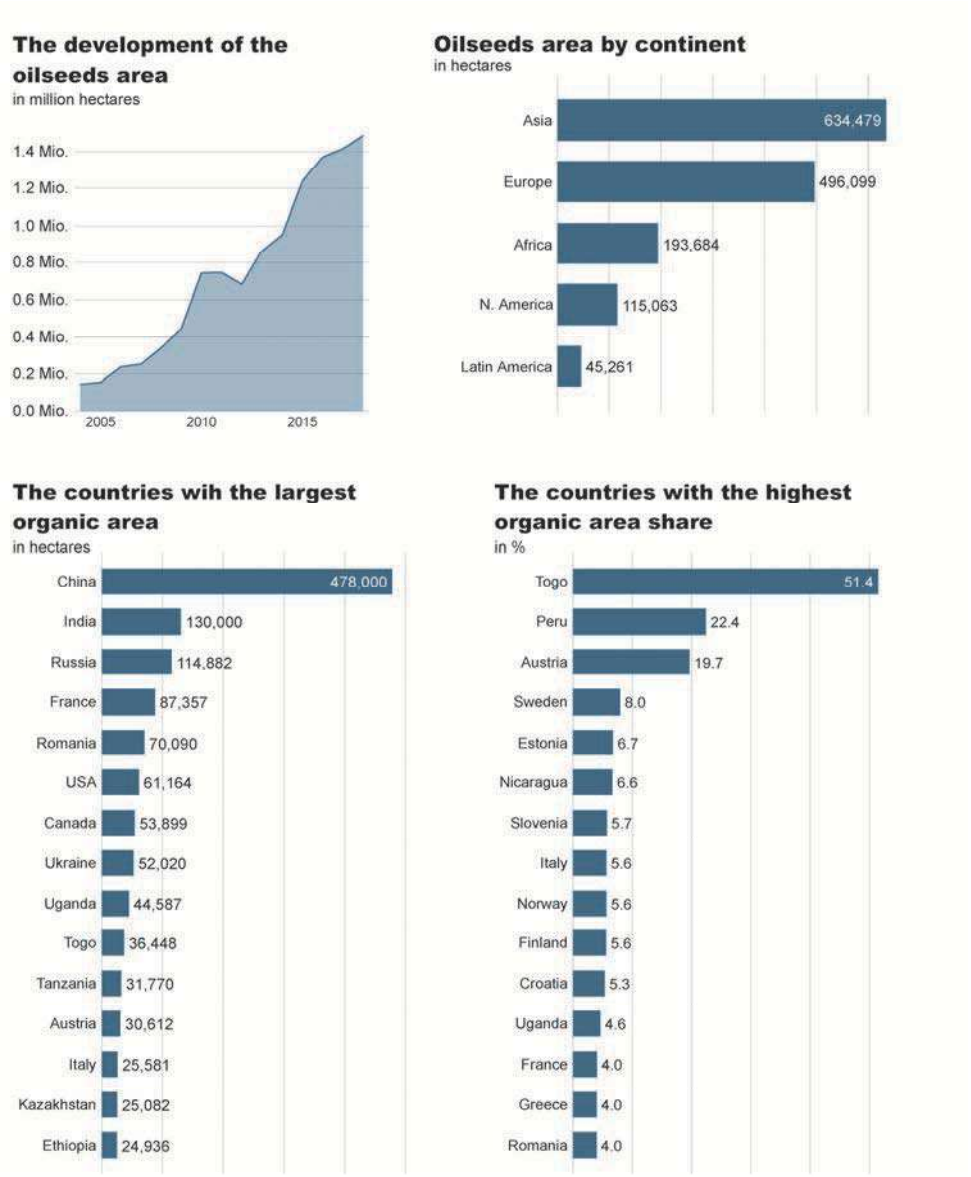

Figure 47: Oilseeds: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

Table 34: Oilseeds: Organic area by country 2018

Country	Organic area [ha]	Organic area [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	17'098	0.1	17'098	
Austria	30'612	19.7		
Azerbaijan	126	0.5	50	76
Belarus	156	0.0	3	153
Belgium	267	1.2	201	
Benin	42	0.0	42	
Bolivia	4'038	0.3	4'038	
Bosnia and Herzegovina	23	0.2	23	
Bulgaria	6'058	0.6		
Burkina Faso	16'730	1.9	16'730	
Canada	53'899	0.5	53'899	
China	478'000	2.4	395'000	83'000
Côte d'Ivoire	119	0.1	119	
Croatia	9'611	5.3	6'774	2'836
Czech Republic	1'681	0.4	881	800
Denmark	2'797	1.6	1'655	1'143
Ecuador	122	0.3	104	18
Egypt	1'740	1.4	1'740	
Estonia	4'971	6.7	4'193	778
Ethiopia	24'936	3.0	24'936	
Finland	3'071	5.6	2'149	922
France	87'357	4.0	54'232	33'125
Germany	17'800	1.3		
Greece	4'025	4.0	1'564	2'461
Guatemala	342	0.6		342
Guinea-Bissau	111	0.3	104	7
Hungary	8'630	0.9	8'003	627
India	130'000	0.5		
Indonesia	221	0.0	221	
Iran	650	0.2	650	
Ireland	189	1.9	134	55
Israel	7	0.1	7	
Italy	25'581	5.6	18'539	7'042
Kazakhstan	25'082	1.0	21'668	3'414
Kenya	715	0.5	1	714
Kyrgyzstan	5	0.0	4	1
Latvia	1'167	1.0	1'101	
Liechtenstein	7	0.0	7	
Lithuania	5'988	3.2	4'898	1'090
Luxembourg	12	0.4	11	1
Madagascar	1'387	1.6	1'387	
Malawi	11'996	2.0	11'996	
Mali	10'110	2.1		
Mexico	16'145	3.5		
Moldova	3'720	0.8	1'951	1'769
Myanmar	345	0.0	345	

Country	Organic area [ha]	Organic area [%]	Area fully converted [ha]	Area under conversion [ha]
Namibia	21	3.4	21	
Netherlands	33	0.6	19	
Nicaragua	3'730	6.6	3'730	
Nigeria	4'327	0.1	4'197	130
North Macedonia	9	0.1	2	7
Norway	133	5.6	122	11
Paraguay	2'343	0.1		
Peru	1'442	22.4	1'419	
Poland	3'434	0.4	1'675	1'759
Portugal	64	0.5	16	48
Romania	70'090	4.0	43'615	
Russian Federation	114'882	1.0	109'262	5'620
Senegal	1'362	0.1	975	387
Serbia	1'901	0.4	1'834	66
Slovakia	4'574	1.6	2'491	2'084
Slovenia	378	5.7	329	49
South Africa	74	0.0	64	10
Spain	9'770	1.2	8'134	1'636
Sudan	7'209	0.1	7'209	
Sweden	9'453	8.0	8'467	987
Switzerland	886	3.2		
Tajikistan	42	0.3	12	30
Tanzania	31'770	1.1	26'285	5'485
Togo	36'448	51.4		
Turkey	14'637	1.5	8'888	5'749
Uganda	44'587	4.6		
Ukraine	52'020	0.6		
United Kingdom	112	0.0	60	51
United States	61'164	0.2		
Zimbabwe	1	0.0	1	
World	**1'484'585**	**0.6%**	**885'285**	**164'484**

Source: FiBL survey 2020 based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315
Blank cells: no data.

Please note that the 2017 data provided for oilseeds are different from what we communicated in previous editions of this yearbook. This is due to the fact that for China the 2017 data were totally revised.

For more information on soybean production (organic and other Voluntary Sustainability Standards - VSS), please see the report "The State of Sustainable Markets – Statistics and Emerging Trends 2019."[1]

[1] Willer, Helga, Gregory Sampson, Vivek Voora, Duc Dang, Julia Lernoud (2019): The State of Sustainable Markets – Statistics and Emerging Trends 2019. International Trade Centre (ITC), Geneva. Available at: http://www.vss.fibl.org/de/vss.html.
For interactive online graphics see the Sustainability Map at https://www.sustainabilitymap.org/trends

› Olives

In 2018, around 872'000 hectares or 8.2% of the global olive area was under organic management.

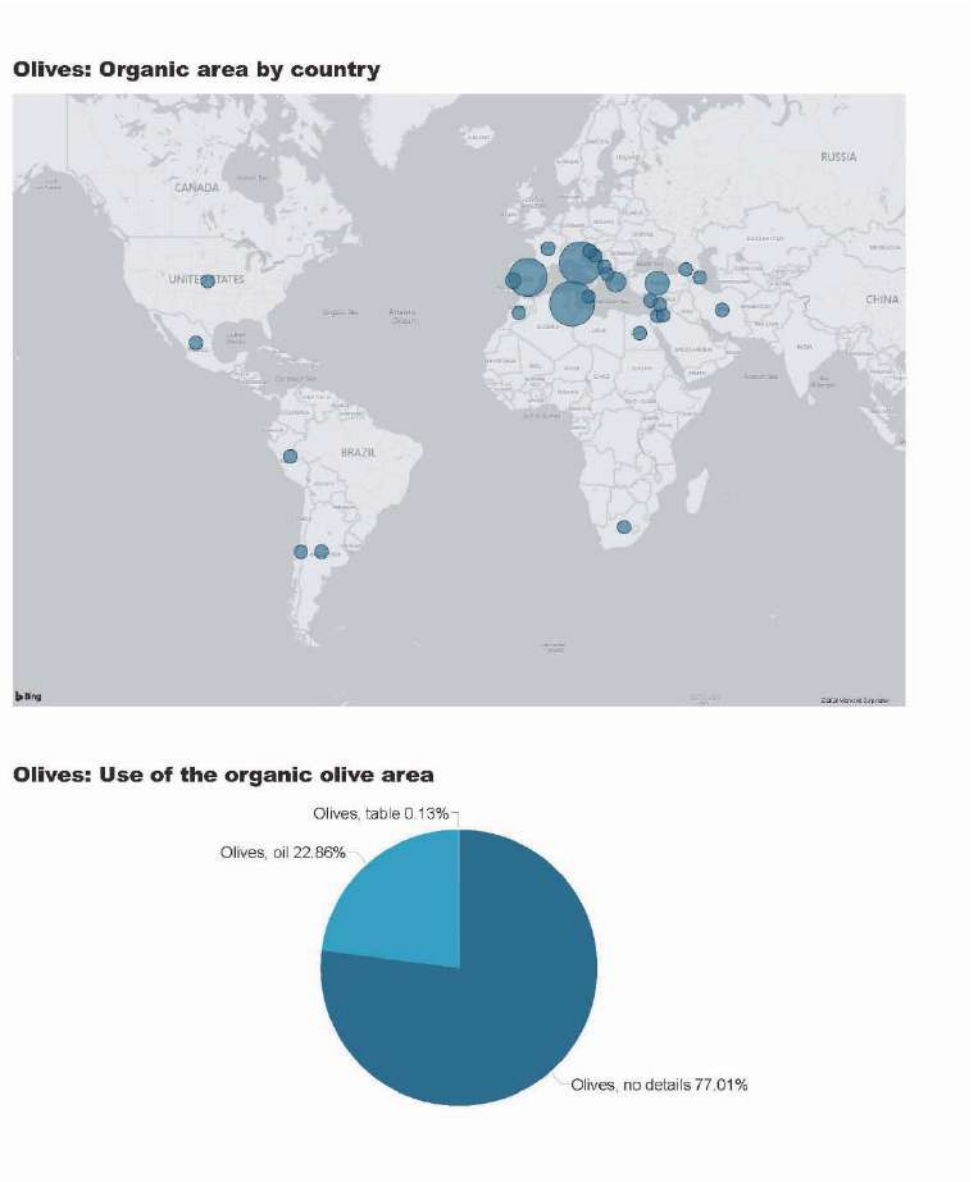

Figure 48: Olives: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

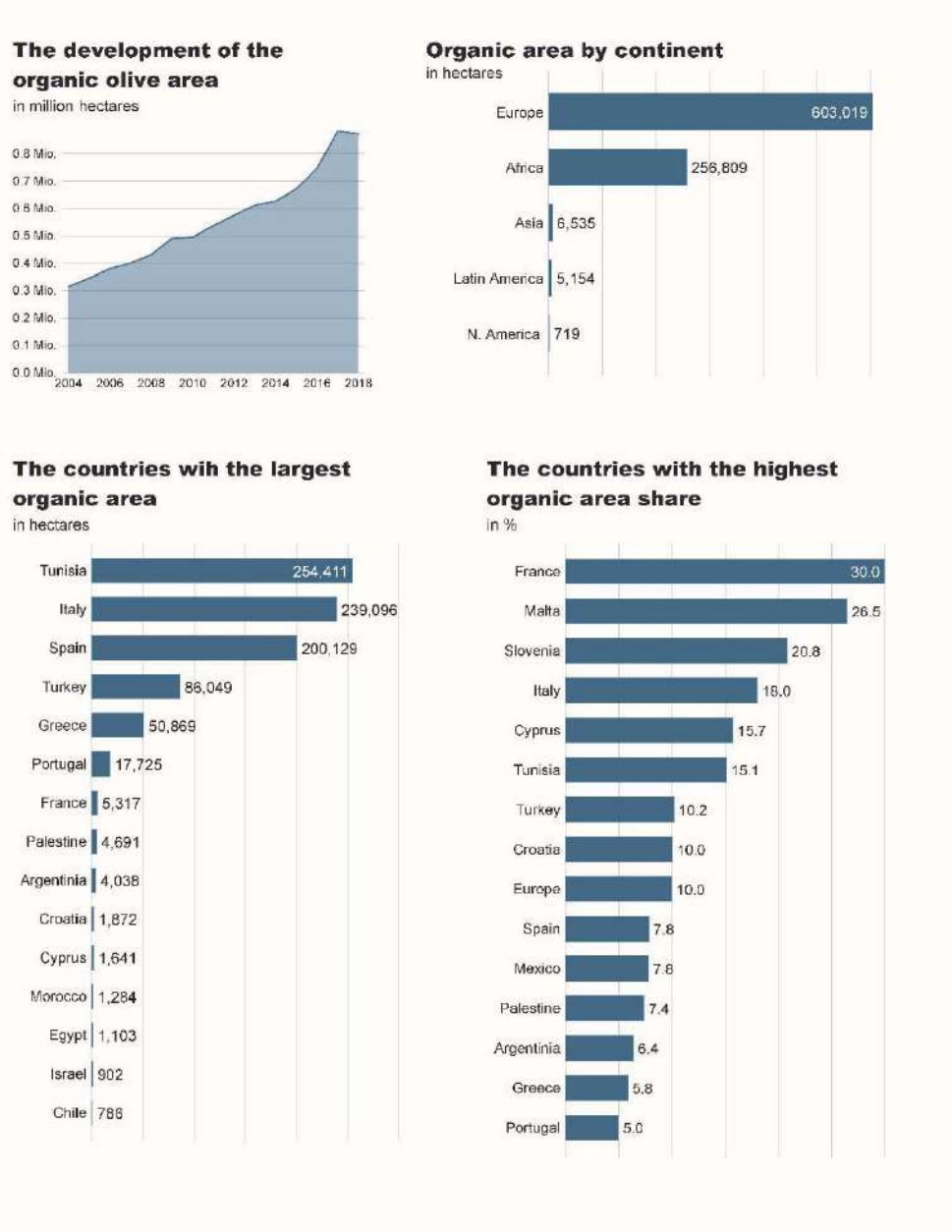

Figure 49: Olives: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

Table 35: Olives: Organic area by country 2018

Country	Organic area [ha]	Organic area [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	49	0.1	36	13
Argentina	4'038	6.4	4'038	
Azerbaijan	13	0.5	5	8
Chile	786	3.6		
Croatia	1'872	10.0	1'466	406
Cyprus	1'641	15.7	1'101	540
Egypt	1'103	1.4	1'103	
France	5'317	30.0	4'213	1'104
Georgia	70	0.0		70
Greece	50'869	5.8	34'132	16'737
Iran	245	0.3	155	90
Israel	902	2.7	708	193
Italy	239'096	18.0	182'354	56'742
Jordan	356	0.6		
Lebanon	259	0.4	259	
Malta	9	26.5	9	0
Mexico	236	7.8		
Montenegro	4	2.5	3	1
Morocco	1'284	0.1	1'168	116
Palestine	4'691	7.4	4'101	590
Peru	95	0.4	89	
Portugal	17'725	4.9	15'945	1'780
Slovenia	259	20.8	218	41
South Africa	11	0.0	10	0
Spain	200'129	7.8	174'474	25'654
Tunisia	254'411	15.1		
Turkey	86'049	10.2	62'745	23'304
United States	719	4.9		
World	**872'237**	**8.1%**	**488'331**	**127'391**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315
Blank cells: No data available.

› Vegetables

In 2018, around 387'000 hectares or 0.6% of the global fresh vegetable area was under organic management.

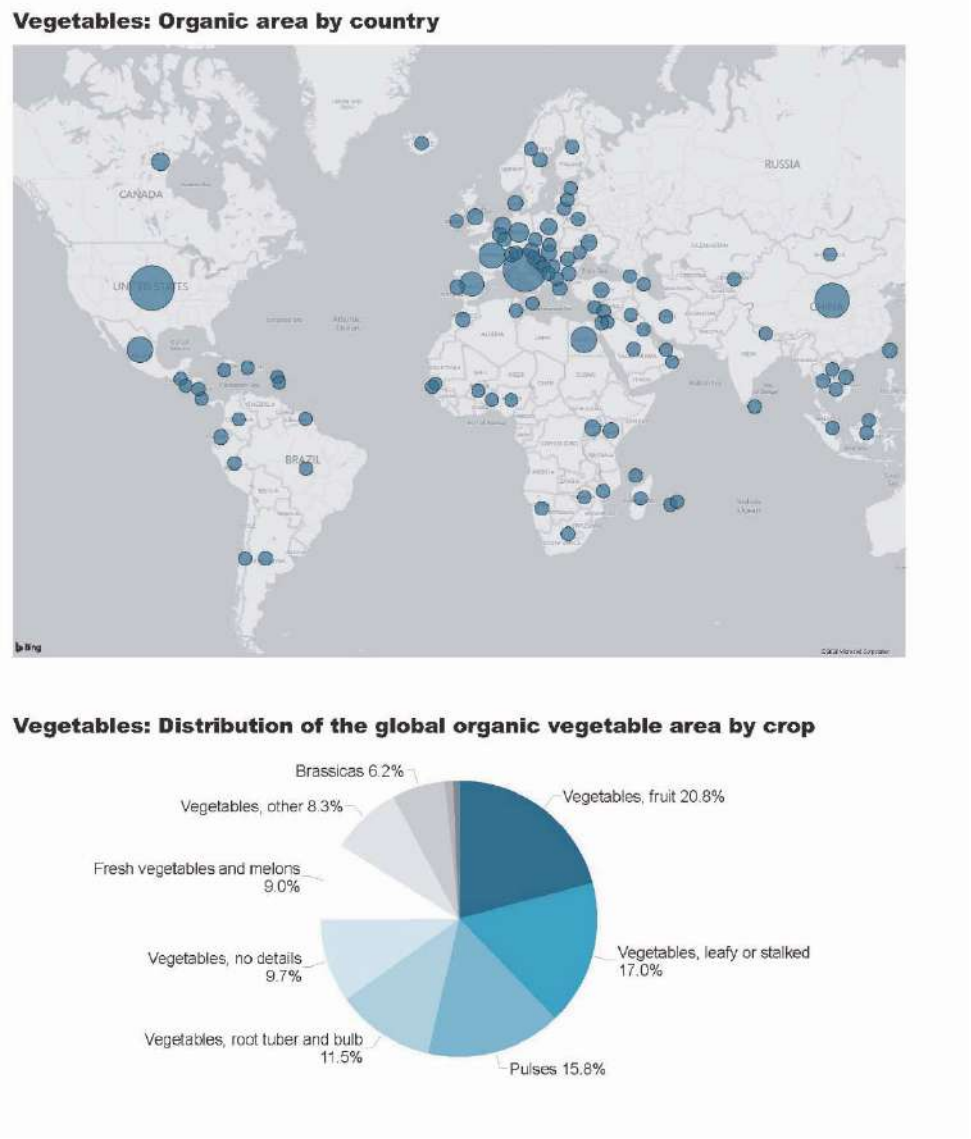

Figure 50: Vegetables: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

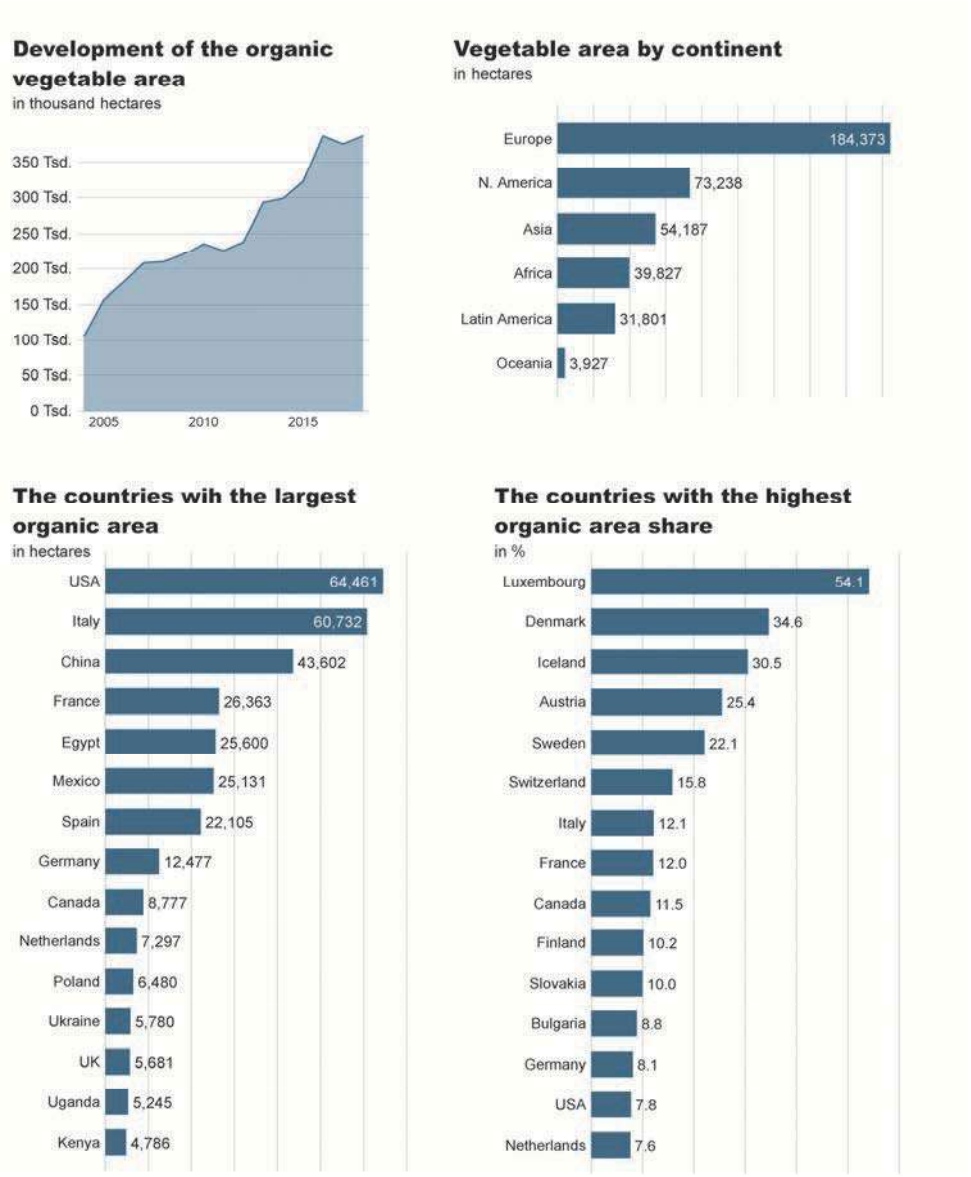

Figure 51: Vegetables: Organic area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments.

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

Table 36: Vegetables: Organic area by country 2018

Country	Organic area [ha]	Organic area [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	1'036	0.5	971	
Australia	3'902	5.2		
Austria	4'309	25.4		
Azerbaijan	213	0.2	55	158
Belarus	34	0.1	9	26
Belgium	1'846	2.9	1'654	
Benin	5	0.0	5	
Bosnia and Herzegovina	11	0.0	8	3
Brazil	3	0.0		
Bulgaria	2'648	8.8		
Burkina Faso	1	0.0	1	
Cambodia	143	0.1	143	
Canada	8'777	11.5	8'777	
Chile	109	0.2		
China	43'602	0.2	27'295	16'307
Colombia	22	0.0		
Costa Rica	189	1.2		
Croatia	416	3.7	232	184
Cyprus	71	2.2	27	45
Czech Republic	260	2.1	235	25
Denmark	3'916	34.6	3'771	144
Dominican Republic	7	0.0		
Ecuador	3'571	4.2	3'002	569
Egypt	25'600	3.4	25'600	
El Salvador	3	0.0	3	
Estonia	217	6.0	196	22
Finland	1'223	10.2	382	841
France	26'363	12.0	23'127	3'237
French Guiana (France)	55	3.4	17	37
French Polynesia	25	4.5	25	
Gambia	1	0.0	1	
Georgia	8	0.0	8	
Germany	12'477	8.1		
Greece	1'871	2.2	1'079	792
Guadeloupe (France)	28	0.6	24	4
Guatemala	565	0.5	485	80
Hungary	3'976	7.1	3'410	567
Iceland	13	30.5	13	
Indonesia	135	0.0	135	
Iran	385	0.1	100	285
Iraq	53	0.0		
Ireland	274	4.1	260	15
Israel	952	0.8	939	13
Italy	60'732	12.1	45'119	15'613
Jamaica	57	0.3	56	0
Jordan	16	0.0		
Kenya	4'786	2.9	4'786	
Kuwait	22	0.4	22	
Kyrgyzstan	49	0.1	41	8
Lao	47	0.0		
Latvia	379	4.6	291	
Lebanon	56	0.2	56	0
Liechtenstein	18	0.0	18	
Lithuania	446	3.4	415	32
Luxembourg	64	54.1	52	13
Madagascar	55	0.1	44	10
Malaysia	161	0.3	148	13
Malta	6	0.1	6	0
Martinique (France)	19	0.8	18	0

Country	Organic area [ha]	Organic area [%]	Area fully converted [ha]	Area under conversion [ha]
Mayotte	18	0.0	18	
Mexico	25'131	3.4		
Moldova	6	0.0	6	0
Mongolia	100	1.2		
Montenegro	1	0.0		1
Morocco	2'160	1.2	1'795	365
Mozambique	1	0.0	1	
Namibia	40	0.5	40	
Nepal	332	0.1		96
Netherlands	7'297	7.6	7'232	
Nicaragua	5	0.1	5	
Nigeria	140	0.0	138	2
North Macedonia	184	0.4	117	68
Norway	420	5.6	413	8
Oman	16	0.1		
Palestine	2	0.0	1	1
Peru	1'001	0.5	45	
Poland	6'480	3.3	5'137	1'343
Portugal	3'278	6.1	3'064	214
Republic of Korea	310	0.1		
Réunion (France)	160	2.6	144	16
Romania	1'442	0.5	1'147	
Saudi Arabia	692	1.0	306	386
Senegal	168	0.3	43	125
Serbia	173	0.2	143	30
Singapore	3	0.2		
Slovakia	517	10.0	449	68
Slovenia	235	4.1	208	26
South Africa	1'311	0.9	1'143	168
Spain	22'105	5.7	18'680	3'425
Sri Lanka	129	0.2	129	
Sweden	2'379	22.0	2'287	92
Switzerland	2'583	15.8		
Taiwan	2'760	1.9	2'760	
Thailand	1'858	0.4	1'858	
Tunisia	137	0.1		
Turkey	4'241	0.4	2'556	1'687
Uganda	5'245	2.1		
Ukraine	5'780	1.1		
United Arab Emirates	57	0.7	55	2
United Kingdom	5'681	4.9	5'307	375
United States	64'461	7.7		
Viet Nam	2'088	0.2	2'002	86
World	**387'352**	**0.6%**	**210'289**	**47'624**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Please note that the 2016 and 2017 total area provided for vegetables is different from what we communicated in previous editions of this yearbook. This is due to the fact that for China the 2017 data and for Mexico, the 2016 and 2017 data were totally revised.

Organic Cotton[1]

LISA BARSLEY,[2] LIESL TRUSCOTT,[3] EVONNE TAN,[4] AMISH GOSAI[5], AND ALICE DOS SANTOS[6]

Global trends

2017/18 was a year to celebrate in the organic cotton sector. Not only did global production of organic cotton see an impressive 56 percent growth; it also represented the highest volume seen since 2010/11 when the financial crisis led to a dramatic decline, with a global total of 180'871 metric tons in 2017/18.

Growth stemmed predominantly from India, China and Kyrgyzstan, but also from Turkey, Tanzania, and Tajikistan. In addition to the 180'871 metric tons of certified organic cotton produced, there were 44'394 hectares of cotton-growing land in transition to organic in 2017/18, spread largely between these same six countries. This is lower than the 219'086 hectares in transition to organic in 2016/17 due to much of this land reaching certification and contributing to the 56 percent growth in organic global fiber production seen in 2017/18.

There were an estimated 182'876 farmers growing certified organic cotton in 2017/18, spread across 19 countries. Organic cotton was planted on a total of 356'131 hectares of certified land. An interesting trend seen in India is that farmers significantly increased the proportion of organic certified land used to grow cotton (as opposed to other organic crops) from 45 to 70 percent in 2017/18.

Estimates indicate that global production of organic cotton will continue to grow in 2019/20, with growth stemming predominantly from India, Tanzania, Turkey, Kyrgyzstan and Brazil, among others.

The top seven organic cotton-producing countries accounted for 98 percent of global production in 2017/18. These countries are India (47.29 percent), China (21.33 percent), Kyrgyzstan (12.33 percent), Turkey (6.44 percent), Tajikistan (4.98 percent), the United States (2.81 percent) and Tanzania (2.70 percent).

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[1] This article is a condensed version of the 2019 Organic Cotton Market Report produced by Lisa Barsley, Evonne Tan, Liesl Truscott, and Amish Gosai, with production data collected by the following Textile Exchange Regional Ambassadors: Atila Ertem (Turkey and Central Asia), Amish Gosai (India), Sandra Marquardt (United States), Silvio Moraes (Latin America), Leonard Mtama (East Africa), Silvère Tovignan (West Africa), and Lazare Yombi (West Africa).
The full 2019 Organic Cotton Market Report is available here: https://store.textileexchange.org/product/2019-organic-cotton-market-report/
More information about Textile Exchange is available here: https://textileexchange.org/
More information about organic cotton is available on www.aboutorganiccotton.org

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Development of organic cotton fibre production
Source: Textile Exchange Organic Cotton Market Report 2019

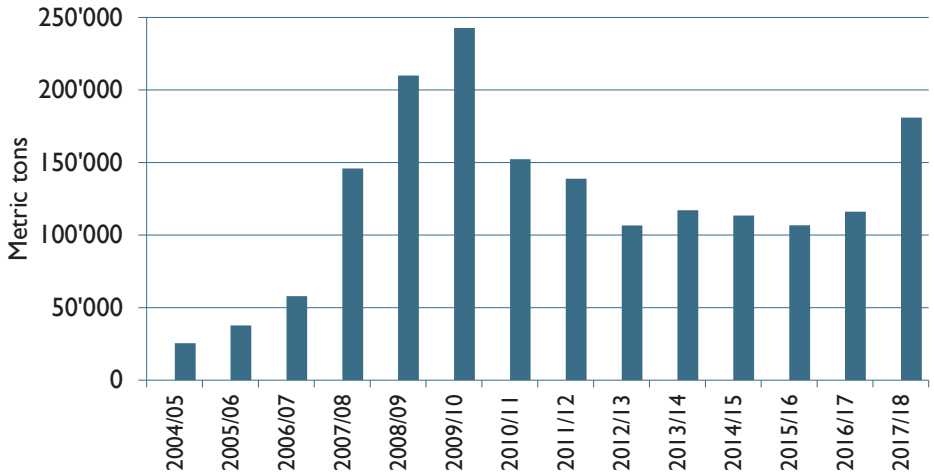

Figure 52: Development of organic cotton fibre production in metric tons

Source: Textile Exchange Organic Cotton Market Report 2019

The remaining two percent was produced by Greece (0.47 percent), Uganda (0.42 percent), Benin (0.39 percent), Burkina Faso (0.30 percent), Peru (0.28 percent), Egypt (0.16 percent), Mali (0.04 percent), Ethiopia (0.02 percent) Brazil (0.01 percent), Senegal (0.003 percent), Argentina (0.001 percent), and Thailand (0.001 percent). See Table 37 for more detail on country-level production, or read on for region-level summaries.

Geography of production

Africa

Countries producing organic cotton in Africa in 2017/18 included Ethiopia, Tanzania and Uganda in the East, and Benin, Burkina Faso, Mali, and Senegal in the West. Combined, a total of 7'048 metric tons of organic cotton fibre was produced on 68'321 hectares by 36'091 farmers across Africa. This represents a growth of 20 percent over the previous season, and Africa currently accounts for four percent of global organic cotton production. An additional 1'712 hectares of cotton-growing land were in conversion to organic, located in Tanzania (1'297 hectares) and Mali (415 hectares).

China

In China, 2017/18 saw a total of 38'586 metric tons of organic cotton fibre produced on 20'023 hectares by at least 1'472 farmers (note that farmer numbers are incomplete). This represents a growth of 71 percent over the previous season, and China now

accounts for 21 percent of global organic cotton production. An additional 3'669 hectares of cotton-growing land were in conversion to organic.

EMENA and Central Asia

Countries producing organic cotton in the EMENA[1] and Central Asia region in 2017/18 included Egypt, Greece, Kyrgyzstan, Tajikistan and Turkey. Combined, a total of 44'097 metric tons of organic cotton fibre was produced on 29'432 hectares by 2'414 farmers. This represents a growth of 88 percent over the previous season, and this region now accounts for 24 percent of global organic cotton production. An additional 12'840 hectares of cotton-growing land was in conversion to organic, the majority in Kyrgyzstan and Turkey, with some also in Tajikistan and Egypt.

Latin America and the Caribbean

Countries producing organic cotton in Latin America and the Caribbean in 2017/18 included Argentina, Brazil and Peru. Combined, a total of 526 metric tons of organic cotton fibre was produced on 1'300 hectares by 1'172 farmers. This represents a growth of 38 percent over the previous season, and this region currently accounts for 0.3 percent of global organic cotton production. An additional 627 hectares of cotton-growing land was in conversion to organic, split between Peru (309 hectares) and Brazil (318 hectares). There is a new project underway in Haiti to re-introduce cotton growing to the country using organic agricultural practices, but it is not yet certified. It's important to note that a portion of Brazil's organic cotton is produced under the Participatory Guarantee System (PGS), an alternative to third-party certification. For details and breakdown, please see page 45 of Textile Exchange's 2019 Organic Cotton Market Report.

South Asia

Countries producing certified organic cotton in South Asia in 2017/18 included India and Thailand (note that Thailand's organic cotton is produced under the Participatory Guarantee System). Combined, the region produced a total of 85'531 metric tons organic cotton fibre on 226'411 hectares of land by 141'659 farmers. This represents an impressive 44 percent increase compared to the previous year. India accounts for the vast majority (over 99 percent) of the region's total production, and 47 percent of global production. Within India, Odisha and Madhya Pradesh each accounted for 29 percent of national organic cotton production in 2017/18, followed by Gujarat (21 percent), Maharashtra (15 percent), Rajasthan (six percent), Telangana (one percent), and Karnataka (one percent).

Pakistan had land in conversion to organic in 2017/18, but no certified production yet (that will come in 2018/19). There is also a pilot program underway in Myanmar.

[1] Europe, Middle East and North Africa

United States

In the United States, 5'082 metric tons of organic cotton fibre were produced on 10'644 hectares by 68 farmers in 2017/18. This represents a growth of 12 percent over the previous season, and the United States currently accounts for almost three percent of global organic cotton production. The majority (96 percent) of organic cotton in the United States is grown in the state of Texas, with the remaining four percent grown in New Mexico and North Carolina.

Organic and Textile Standards

Organic cotton is grown within a rotation system that builds soil fertility, protects biodiversity, and is grown without the use of any synthetic chemicals or genetically engineered organisms. Organic cotton is subject to the national laws governing organic production including the European Union's Organic Regulation 834/2007, the USDA National Organic Program (NOP) in the United States, and the National Programme for Organic Production (NPOP) in India.

Voluntary standards, the Global Organic Textile Standard (GOTS) and the Organic Content Standard (OCS) provide chain of custody assurance from the farm to the final product, with GOTS also addressing textile processing.

Between 2017 and 2018, the total number of OCS-certified facilities grew 16 percent, from 3'643 to 4'226. The highest growth rate was seen in Italy (141 percent) but in terms of actual number of facilities, the largest contributors to the global growth are Bangladesh (+304 facilities) and Turkey (+169).

The total number of GOTS-certified facilities grew 15 percent between 2017 and 2018, from 5'024 to 5'760. Progress is seen in both production and consuming regions. Countries and regions with the largest growth rate in 2018 are Bangladesh (29 percent), USA (25 percent), Pakistan (23 percent) and South Korea (23 percent). In terms of total numbers, the highest increase is reported from India (+315 facilities), followed by Bangladesh (+155) and Europe (+98).

Further reading

Textile Exchange (2019): Organic Cotton Market Report 2019. The Textile Exchange, Texas. Available at https://store.textileexchange.org/product/2019-organic-cotton-market-report/

Note on Table 37: Organic cotton farmers, area and production 2017/2018

*NOTE: The land area figures reported by Textile Exchange refer to land certified to an organic standard by a producer group growing organic cotton. However, the same piece of land can be, and increasingly is being, used to grow other organic crops in addition to cotton. Crop rotation is fundamental to organic agriculture but, with the low and falling cotton price in recent years, more and more farmers are moving away from cotton to grow other crops, such as marigold in India, which can fetch a higher price on the market. This means that reported land area figures do not necessarily reflect the land area used to grow only organic cotton, and may therefore seem disproportionately high compared to the organic cotton volumes harvested.

Organic cotton

Table 37: Organic cotton farmers, area and production 2017/2018

Region	Country	No. of Farmers	Certified Organic Area [ha]*	Organic seed cotton [MT]	Organic cotton fibre [MT]	Share of organic fibre prod. [%]	Total in-conversion land area [ha]
Africa	Benin	3'565	3'730	1'757	712.6	0.39%	-
	Burkina Faso	8'403	3'509	1'371	538.0	0.30%	-
	Ethiopia	200	174	164	60.4	0.03%	-
	Mali	1'118	8'542	213	76.6	0.04%	415.00
	Senegal	280	81	13	5.5	0.003%	-
	Tanzania	14'206	40'913	12'521	4'890.0	2.70%	1'296.50
	Uganda	8'319	11'372	1'862	764.6	0.42%	-
Africa Total	*Africa Total*	*36'091*	*68'321*	*17'901*	*7'048*	*3.9%*	*1'712*
China Total	*China Total*	*1'472*	*20'023*	*96'968*	*38'586.3*	*21.33%*	*3'669.08*
Middle East & Central Asia	Egypt	19	219	777	287.4	0.16%	1'042.68
	Greece		1'153	2'500	850.0	0.47%	
	Kyrgyzstan	1'180	14'631	55'772	22'308.7	12.33%	9'100.00
	Tajikistan	949	8'011	22'497	8'998.6	4.98%	258.50
	Turkey	266	5'418	29'130	11'652.2	6.44%	2'439.00
Middle East & Central Asia Total	*Middle East & Central Asia Total*	*2'414*	*29'432*	*110'676*	*44'097*	*24.4%*	*12'840*
Latin America	Argentina	22	100	4	1.6	0.001%	-
	Brazil	930	619	69	22.3	0.01%	317.80
	Peru	220	580	1'223	502.3	0.28%	308.75
Latin America Total	*Latin America Total*	*1'172*	*1'300*	*1'296*	*526*	*0.3%*	*627*
South Asia	India	141'421	226'316	240'026	85'529.9	47.29%	25'237.15
	Pakistan	183	-	-	-	0.000%	4.85
	Thailand	55	96	4	1.6	0.001%	-
South Asia Total	*South Asia Total*	*141'659*	*226'411*	*240'030*	*85'531*	*47.3%*	*25'242*
USA Total	*USA Total*	*68*	*10'644*	*14'520*	*5'081.9*	*2.81%*	*304.55*
Total	*GLOBAL TOTAL*	*182'876*	*356'131*	*481'391*	*180'871*	*100%*	*44'394*

Source: Textile Exchange Organic Cotton Market Report 2019.

Global Market

Organic Imports

The Global Market for Organic Food & Drink[1]

AMARJIT SAHOTA[2]

Introduction

Organic food sales surpassed the 100 billion US dollar mark for the first time in 2018. Starting from almost nothing in the 1990s, the global organic food market is now worth 105.5 billion US dollars.[3,4] Organic is considered a major sustainability success story in the food industry. Widely regarded as the premier eco-label, over 300 eco-labels are now present in the food industry representing some ethical/environmental/sustainability attributes. With organic farming now practised in over 180 countries, organic is considered the bastion of sustainability in the food industry.

North America

North America has the largest market for organic food & drink. Valued at 51 billion US dollars, the market comprises almost half of global revenues.

Organic products have high penetration in food retailers in the USA and Canada. All leading food retailers are now marketing organic foods under their private labels. O Organics (Safeway) and PC Organics (Loblaws) are the leading private labels for organic foods in the US and Canada, respectively. Kroger, the second-largest food retailer, announced that sales of its Simple Truth private label products surpassed 2 billion US dollars in 2017. The Simple Truth brand houses a wide range of organic, natural and free-from products.

Organic foods and ingredients are also making inroads in the catering & foodservice sector. A number of restaurants, cafés and fast-food establishments are using organic ingredients. Some foodservice outlets are focusing on organic products. For instance, the first USDA-certified organic fast food outlet opened in San Francisco under the Organic Coup banner in 2015. It was operating 12 fast food restaurants in California and Washington in 2019.

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[3] Please note that there are some differences in organic food sales between the calculations of Ecovia Intelligence and those of FiBL due to different methodologies.

[4] One euro corresponded to 1.810 US dollars in 2018 according to the European Central Bank.

Amy's Drive Thru is the first drive-through organic vegetarian fast-food restaurant. The first drive-through location opened in Rohnert Park, California in summer 2016. It plans to open five more outlets in California and then expand further.

Demand for organic foods continues to outpace supply, with organic products imported into the US from every continent. Imports of organic products are being facilitated by organic trade arrangements between the US and various countries, such as Switzerland, Canada, Japan, South Korea, Taiwan, as well as the EU.

Europe

The European market for organic food & drink is the second largest in the world. Worth roughly 45 US dollars, it comprised 42 percent of global revenues in 2018.

Mainstream retailers generate most organic food sales in Europe. All leading supermarkets are offering organic foods under their private labels. In Germany (the largest country market), supermarkets, drugstores, discounters, and organic food shops have developed private label ranges.

Distribution of organic foods is increasing in retail and non-retail channels. Organic products are making inroads in professional home delivery schemes, online retailers, as well as drugstores and pharmacies. Direct marketing is becoming increasingly prominent in northern Europe. Organic farmers are selling direct to consumers via farmers markets and farm shops. The growing popularity of regional produce is driving this trend. For instance, the British box scheme company Riverford delivers about 50'000 organic vegetable boxes a week.

Many retailers are actively promoting their organic product ranges. It is becoming increasingly common for supermarkets to undertake advertising on television, radio, magazines and billboards for their private label ranges.

Similar to North America, organic foods/ingredients are being used by catering & food service establishments. A growing number of chained outlets, such as McDonald's, IKEA and Pret A Manger are sourcing organic products. National governments are encouraging the use of organic foods in public institutions. For instance, the French government introduced a bill in February 2018 requiring that at least half of food purchased by the Catering and Food Service (CFS) sector must be either organic, come with a quality label, or be locally produced by 2022.

Organic food sales are concentrated in Western Europe. Central & Eastern European (CEE) countries, such as Poland, Ukraine and Hungary, are important producers of organic crops. However, they have relatively small markets for organic products.

Other regions

Although demand for organic products is rising across the world, the market for organic food & drink in other regions remains relatively small. The combined market value in other regions (Asia, Australasia, Latin America and Africa) totalled 9.6 billion US dollars in 2018.

Asia has the third-largest market for organic products. The organic food market is experiencing healthy growth as consumer awareness is increasing in countries, such as India, China and Indonesia. Organic foods were rare in the 2000s. Following the trend in Europe and North America, large food retailers are becoming more active in selling organic products. Some are launching private labels and setting up supply chains for their organic product ranges.

The largest producers of organic crops are countries with large agricultural sectors, such as India, China, Indonesia, Thailand, Sri Lanka and the Philippines. The largest consumers, however, are the most affluent countries, such as China, South Korea, Japan, Taiwan and India. Indeed, China and India started off as large producers and exporters of organic products, and have only recently developed sizeable internal markets.

Brazil has the largest market for organic products in Latin America. Similar to Asia, demand is coming from a growing middle class that is seeking healthy, nutritious foods. According to Organis, 19 percent of Brazilians are now regular buyers of organic products. Street markets and supermarkets are the most important outlets for organic food sales. Other Latin American countries, such as Argentina, Peru, Chile, and Colombia, have export-oriented organic food markets.

Australia and New Zealand also have important markets for organic products. Both countries are established as leading exporters; organic products include beef, lamb, kiwi fruit, apples, pears, onions, wine, and dairy products.

Growth outlook

Organic food & drink sales are projected to continue to grow at a healthy pace in the coming years. Initially starting from Europe and the United States, organic food production and consumption has now become a global phenomenon.

Organic farming is now practised in almost all countries of the world. However, demand for organic foods remains concentrated in North America and Europe. Although the share of these two regions is declining, they still comprise over 85 percent of global sales. A major challenge is for strong local markets to develop in Asian, Latin American and African countries.

Another challenge is the rise in competing for sustainable food products. Sustainability is becoming an integral part of the food industry, with a growing number of companies adopting eco-labels and sustainability schemes. Organic is just one part of a growing complex sustainability mix. There is a concern that it may be increasingly marginalised in favour of other schemes.

Consumer preferences are also changing. Consumers are demanding ethical and sustainable products; however, organic is only one of the various options they now have. Globally, plant-based foods are gaining currency as they appeal to consumers who want to reduce/avoid animal-based products. Some of the reasons why consumers buy plant alternatives to meat and dairy products are the same reasons why consumers buy organic foods: concern for the environment, animal welfare, and

general health. In the US, organic dairy product sales have already been affected by this change in consumer behaviour.

Although the forecast may appear rosy for the organic products market, there are questions on how organic foods will fit into a food industry that is becoming rife with eco-labels, sustainability schemes, and ethical food options. How it navigates itself through this green maze will determine the pace of growth in the coming decade.

Reference

Ecovia Intelligence (2019): The Global Market for Organic Food & Drink. Ecovia Intelligence. More information is available on www.ecoviaint.com

Organic imports in the European Union 2018 – A first analysis

ELENA PANICHI[1]

This article summarises the European Commission's Agricultural Market Brief No 14, "Organic imports in the EU" (European Commission 2019). The brief aims to describe the main features of the imports of organic agri-food products into the European Union (EU) from third countries both in terms of products and origin. For more information about the regimes for imports from third countries, TRACES and the classification used, please see explanations in the "background" section at the end of this chapter.

Organic import volumes in metric tons

In 2018, the EU imported a total of 3.3 million tonnes of organic agri-food products.

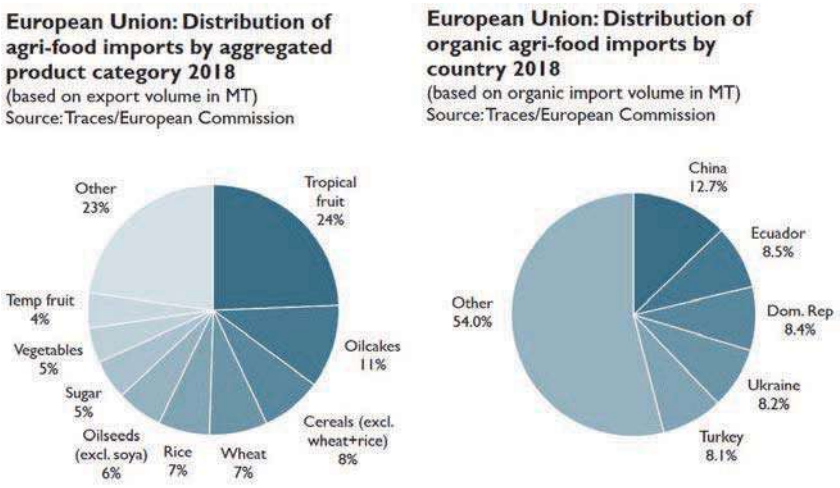

Figure 53: European Union: Distribution of agri-food imports by aggregated product category and by country 2018

Source: TRACES /European Commission 2019

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Disclaimer: the information and views set out in this article are those of the author and do not necessarily reflect the official opinion of the European Commission.

Figure 53 and Table 39 show that imports of tropical fruit (fresh or dried), nuts and spices represent the single biggest category, totalling 793'597 tonnes or 24.4 percent of total imports. The next most imprortant import products are oilcakes (352'043 tonnes, 10.8 percent), cereals other than wheat and rice (255'764 tonnes, 7.8 percent), Wheat (243'797 tonnes, 7.5 percent), and rice (216'017 tonnes, 6.6 percent).

The EU sources its organic agri-food imports widely, with a total of 115 countries registering exports to the EU. In volume terms, China is the biggest supplier of organic agri-food products to the EU, with 415'243 tonnes of produce; that is 12.7 percent of the total. Ecuador, the Dominican Republic, Ukraine and Turkey each have an 8 percent share of the total import volume

An analysis per country

The analysis of the key countries shows the following:

- Almost three-quarters of the imports from **China** in volume consist of oilcakes. The remaining imports are represented mainly by soybeans (5.7 percent) and oilseeds other than soya (5 percent).
- Concerning **Ecuador**, more than 90 percent of the imported products are tropical fruit (fresh or dried), nuts and spices. This is likely mostly bananas. The remaining 10 percent is divided mainly between preparation of vegetables, fruits or nuts (3.8 percent) and Palm and palm kernel oils (2.4 percent). Fishery products, cocoa beans, vegetables and others each represent less than 1 percent of the imports in volume.
- **Dominican Republic** supplies the EU almost exclusively with tropical products: 90.0 percent of the imports are tropical fruit (fresh or dried), nuts and spices, and almost 10 percent is represented by cocoa beans.
- **Ukraine** is the most important supplier of organic products to the EU from the European continent. 70 percent of the total imports consist of cereals, broken down into cereals other than wheat and rice (42.8 percent) and wheat (28.5 percent). Oilseeds represent more than 15 percent in total, broken down into oilseeds other than soybeans (10.8 percent), and soybeans (5 percent).
- For **Turkey**, cereals represent the first products imported into the EU, almost 40 percent split into wheat (19.7 percent) and other cereals (17.8 percent). Oilseeds represent a substantial share of the total imports (16.9 percent), while fruit and vegetables altogether amount to more than 24 percent, vegetables, fresh, chilled or dried (12.9 percent) and fruit (fresh or dried) excluding citrus & tropical fruit (11.5 percent).

An analysis of selected products and product groups

Based in the adjusted value of imports of organic agri-food, the most important product groups were tropical fruit (fresh or dried), nuts and spices, unroasted coffee,

tea in bulk and mate, fruit (fresh or dried) excluding citrus & tropical fruit, and cocoa beans (see also Table 39).

- The EU imports organic tropical fruit (fresh or dried), nuts and spices mainly from Ecuador (31.8 percent), followed by the Dominican Republic (31 percent) and Peru (17.4 percent). The remaining countries represent a substantially lower share compared to the first three.
- Regarding unroasted coffee, tea in bulk and mate, Peru is the biggest supplier in term of volume (31.2 percent), followed by Honduras (30.9 percent) and Mexico (7.2 percent).
- More than half of the fruit (fresh or dried), excluding citrus & tropical fruit comes from Argentina, Turkey (20.7 percent each) and New Zealand (11.5 percent).
- The Dominican Republic is the main supplier of cocoa beans (36.5 percent), followed by Peru (21 percent), while the rest comes mainly from Africa (40 percent) broken down into Congo (13.3 percent), Sierra Leone (10.3 percent), Uganda (6.8 percent), Tanzania (4.3 percent) as well as Sao Tome and Principe and Madagascar.

Importance of certain organic products relative to total imports

In order to assess the importance of the organic agri-food imports of the total agri-food imports into the EU, an analysis was made of the share of organic produce by product category.

Olive oil represents the most important product category, with 20.7 percent of total imports being organic. Flours and other products of the milling industry have a share of 15.2 percent, beet and cane sugar 11.0 percent, and rice 10.9 percent. While tropical fruit (fresh or dried), nuts and spices was the most important organic product category in absolute terms, organic imports only account for 9 percent of total EU agri-food imports for such products.

These data suggest that there is an important demand for specific organic products, such as organic olive oil, flours, sugar, rice and tropical fruit.

Background

Third countries

The EU imports organic products from third countries under two different regimes:

1) equivalent third countries (US, Canada, Japan, South Korea, India, Argentina, Australia, New Zealand, Costa Rica, Chile, Israel, Switzerland and Tunisia), which have a production and control system recognised as equivalent, for certain product categories, by the EU, listed in Annex III of Regulation 1235/2008, and

2) the control body system: private bodies authorised by the European Commission and listed in annex IV of the same Regulation that can operate in third countries and certify operators for the purpose of exports. As of 2021, under the new Regulation 2018/848, the control bodies will have to apply for compliance to EU rules.

Electronic Certificate of Inspection (CoI)

Since October 2017, the Certificate of Inspection (CoI) that must accompany every consignment entering the EU has become electronic. Besides enhancing the traceability of the organic consignments coming from third countries, the system has allowed the EU to start collecting valuable data and create a database on the imports of organic products. The collected data are only available in volumes, while values have been estimated.

TRACES - the European Commission's multilingual online management tool

TRACES (TRAde Control and Expert System) is the European Commission's multilingual online management tool hosting the sanitary certificates requested on intra-EU trade and importation of animals, food, feed and plants. It is available in 35 languages, 24 hours a day, seven days a week, free of charge. Its main objective is to simplify and accelerate the trading process by centralising all data included in the certificates. The module for CoIs has been developed according to the organic regulation in force. It ensures the traceability of the products intended to be imported into the EU as organic, as well as the exchange of information between the different actors in the supply chain. The system provides a built-in automatic check for the CN codes of the products, by allowing only the import of products falling in the scope of the EU organic legislation.

Product classification

The classification used here is based on that of the “Monitoring Agri-trade Policy” published monthly by the European Commission Directorate General Agriculture (DG AGRI). There, products are divided into six classes: "commodities, other primary, processed, food preparations, beverage and non-edible products:

- “Commodities” includes, among others: cereals, vegetable oils and oilseeds, sugars, milk powders and butter, unroasted coffee and cocoa.
- “Other primary” includes meat products, fruit and vegetables, milk yoghurt and honey.
- “Processed” includes cheese, meat preparations, wine and fruit juices.
- “Food preparations” includes infant food, confectionery and pasta.
- “Beverages” includes beers, spirits and soft drinks.
- ”Non-edible”“ covers: plants and essential oils.
- Moreover, in its scope, the organic regulation also covers products from the fishery sector, which are reported under the label “non-agri”.

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Tables on organic imports to the European Union

Table 38: Volume of the organic agri-food imports into the EU per country

Rank	Country	Tonnes (MT)	Share of all organic imports (%)
1	China	415'243	12.7
2	Ecuador	278'475	8.5
3	Dominican Republic	274'599	8.4
4	Ukraine	266'741	8.2
5	Turkey	264'218	8.1
6	Peru	207'274	6.4
7	US	170'753	5.2
8	UAE	127'806	3.9
9	India	125'807	3.9
10	Brazil	72'353	2.2
11	Mexico	71'047	2.2
12	Argentina	67'738	2.1
13	Colombia	63'257	1.9
14	Moldova, Republic Of	55'392	1.7
15	Kazakhstan	50'250	1.5
16	Egypt	46'736	1.4
17	Israel	40'959	1.3
18	Honduras	40'379	1.2
19	Tunisia	40'148	1.2
20	Paraguay	35'171	1.1
21	Russian Federation	34'069	1.0
22	Chile	33'437	1.0
23	Thailand	32'803	1.0
24	Canada	29'823	0.9
25	Pakistan	27'091	0.8
26	Sri Lanka	26'570	0.8
27	Philippines	23'874	0.7
28	Uganda	23'327	0.7
29	South Africa	23'222	0.7
30	Serbia	22'576	0.7
31	Togo	22'123	0.7
32	Morocco	19'950	0.6
33	New Zealand	19'208	0.6
34	Costa Rica	16'477	0.5
35	Ghana	14'948	0.5
36	Cote D'Ivoire	14'392	0.4
37	Cuba	13'972	0.4
38	Bolivia	13'274	0.4
39	Viet Nam	12'674	0.4
40	Burkina Faso	12'456	0.4
41	Congo, D.R.	10'788	0.3
42	Cambodia	8'553	0.3
43	Sierra Leone	7'965	0.2
44	Indonesia	7'496	0.2
45	Ethiopia	7'322	0.2
46	Kenya	6'684	0.2
47	Panama	6'328	0.2
48	Madagascar	5'162	0.2
49	Tanzania, United Republic Of	4'254	0.1
50	Nicaragua	3'790	0.1
51	Australia	3'388	0.1
52	Japan	2'756	0.1
53	Senegal	2'637	0.1
54	Sudan	2'579	0.1
55	Mali	2'539	0.1
56	Iran (Islamic Republic of)	1'873	0.1
57	Bosnia And Herzegovina	1'478	0.0

Rank	Country	Tonnes (MT)	Share of all organic imports (%)
58	Sao Tome And Principe	1'472	(0.0
59	Uruguay	1'378	0.0
60	Lao People's Democratic Republic	1'374	0.0
61	Benin	1'328	0.0
62	Albania	1'302	0.0
63	Guatemala	1'300	0.0
64	Algeria	1'198	0.0
65	Papua New Guinea	1'180	0.0
66	Rwanda	1'169	0.0
67	Chad	1'116	0.0
68	Azerbaijan	966	0.0
69	Uzbekistan	949	0.0
70	Belarus	942	0.0
71	Niger	680	0.0
72	Kosovo	544	0.0
73	Lesotho	515	0.0
74	Palestinian Territory, Occupied	474	0.0
75	Guyana	433	0.0
76	Cameroon	401	0.0
77	Georgia	377	0.0
78	Zambia	347	0.0
79	Bangladesh	251	0.0
80	Haiti	222	0.0
81	North Macedonia	211	0.0
82	Nepal	210	0.0
83	Myanmar	201	0.0
84	Armenia	180	0.0
85	Samoa	159	0.0
86	Namibia	152	0.0
87	French Polynesia	138	0.0
88	Korea, Republic of	123	0.0
89	Saudi Arabia	107	0.0
90	Mozambique	99	0.0
91	El Salvador	95	0.0
92	Singapore	66	0.0
93	Somalia	66	0.0
94	Zimbabwe	65	0.0
95	Nigeria	61	0.0
96	Fiji	57	0.0
97	East Timor	55	0.0
98	Netherlands Antilles	54	0.0
99	Kyrgyzstan	49	0.0
100	Equatorial Guinea	46	0.0
101	Jordan	31	0.0
102	Solomon Islands	28	0.0
103	Belize	27	0.0
104	Taiwan	27	0.0
105	Comoros	26	0.0
106	Montenegro	22	0.0
107	Malaysia	20	0.0
108	Suriname	18	0.0
109	Lebanon	7	0.0
110	Grenada	3	0.0
111	Burundi	3	0.0
112	Mauritius	2	0.0
113	Gambia	1	0.0
114	Afghanistan	0	0.0
115	Oman	0	0.0
	Total	**3'258'532**	**100.0**

Source: TRACES/European Commission 2019

Table 39: Volume of the organic agri-food imports into the EU per product category 2018

Rank	Products	Tonnes (MT)	% of agri-food imports
1	Tropical fruit, fresh or dried, nuts and spices	793'597	24.35
2	Oilcake	352'043	10.80
3	Cereals, other than wheat and rice	255'764	7.85
4	Wheat	243'797	7.48
5	Rice	216'017	6.63
6	Oilseeds, other than soybeans	192'927	5.92
7	Beet and cane sugar	166'328	5.10
8	Vegetables, fresh, chilled and dried	148'108	4.55
9	Fruit, fresh or dried, excluding citrus & tropical fruit	147'114	4.51
10	Unroasted coffee, tea in bulk & maté	127'940	3.93
11	Soybeans	105'870	3.25
12	Fruit juices	89'117	2.73
13	Cocoa beans	74'220	2.28
14	Preparations of vegetables, fruit or nuts	55'198	1.69
15	Sugar, other than beet & cane	40'116	1.23
16	Palm & palm kernel oils	39'762	1.22
17	Olive oil	30'138	0.92
18	Citrus fruit	29'042	0.89
19	Wine, vermouth, cider and vinegar	21'373	0.66
20	Flours and other products of the milling industry	20'376	0.63
21	Food preparations, not specified	18'263	0.56
22	Eggs and honey	17'871	0.55
23	Bulbs, roots and live plants	12'505	0.38
24	Vegetable oils other than palm & olive oils	10'192	0.31
25	Miscellaneous seeds and hop cones	7'385	0.23
26	Gums, resins and plant extracts	7'061	0.22
27	Soups and sauces	5'961	0.18
28	Fish	5'828	0.18
29	Infant food and other cereals, flour, starch or milk preparations	4'484	0.14
30	Starches, inulin & gluten	3'947	0.12
31	Pasta, pastry, biscuits and bread	2'918	0.09
32	Other feed and feed ingredients	2'580	0.08
33	Pet food	1'844	0.06
34	Cocoa paste and powder	1'821	0.06
35	Water and soft drinks	1'718	0.05
36	Essential oils	1'171	0.04
37	Roasted coffee and tea	793	0.02
38	Non-agicultural products	729	0.02
39	Bovine meat, fresh, chilled and frozen	666	0.02
40	Non edible animal products	453	0.01
41	Chocolate, confectionery and ice cream	383	0.01
42	Coffee and tea extracts	256	0.01
43	Sugar alcohols	250	0.01
44	Ethanol	233	0.01
45	Sheep and goat meat, fresh, chilled and frozen	132	0.00
46	Spirits and liqueurs	107	0.00
47	Fatty acids and waxes	74	0.00
48	Odoriferous substances	42	0.00
49	Pork meat, fresh, chilled and frozen	19	0.00
50	Cut flowers and plants	1	0.00
51	Butter	0	0.00
	Total	**3'258'532**	**100.00**

Source: TRACES/European Commission 2019

Standards and Legislation, Policy Support

Public Standards and Regulations

EMANUELE BUSACCA,[1], FLÁVIA MOURA E CASTRO,[2] JOELLE KATTO-ANDRIGHETTO[3] AND BEATE HUBER[4]

Development of the new EU organic regulation

The European Union (EU) adopted the basic act of its new organic regulation in 2018, which will come into force in 2021. In 2018, the secondary legislation – the delegated and implementing act for production, labelling, controls, and trade – started to be drafted and adopted, in a process that will continue in 2020. The revision nevertheless already started almost a decade ago.

At the end of 2011, less than three years after the current organic regulations[5] came into force, the European Commission (Commission) decided to review the EU organic legislative framework, launching a 1.5-year impact assessment. In March 2014, the Commission submitted a proposal to the EU Council of agriculture ministers (Council) and the European Parliament (Parliament).

After the Council and the Parliament developed their own positions, the three EU institutions entered into the "trialogue" negotiations, with the aim of reaching an agreement and adopting a final text. It took the negotiators 18 trialogue meetings and almost two years to reach an agreement.

After legal checks and translation into all the EU's official languages, the text was published in the EU Official Journal in June 2018. The new organic regulation will apply from 1 January 2021.

The text that has been adopted represents the "Basic Act". This means that many details of the text still have to be developed and adopted in the form of delegated and implementing acts. This process of development of secondary legislation started in June 2018 and should be concluded by June 2020 at the latest, six months before the actual application of the new organic regulation.

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[4] Beate Huber, Research Institute of Organic Agriculture FiBL, Frick, Switzerland. Beate Huber has, together with co-authors (Otto Schmid of FiBL and Lukas Kilcher of FiBL) compiled this chapter in the 2005 to 2019 editions of "The World of Organic Agriculture".
[5] Regulation (EC) No 834/2007 and its implementing Regulations (EC) No 889/2008 and No 1235/2008

Changes in control and certification[1]

The organic control system in the new regulation will be closely linked to the new general legislation on official controls for food and feed that was published in 2017. Additionally, specific control requirements for organic production are detailed in the new organic regulation.

One important change refers to group certification, which is currently only allowed in relation to the control of small operators in developing countries (as defined by OECD[2]). With the new regulation, it will be allowed everywhere in the world, including the EU. Group certification means that a certain number of small farmers can get organised and be certified as a single entity. One certificate covers all the farmers, who cannot sell their certified products other than through the group itself. Specific criteria will be established to define what categories of farmers can join the group (see chapter on internal control systems by Meinshausen et al. on page 159).

Another novelty is that the annual physical inspection will not be mandatory for everyone. Today this applies to 100 percent of certified farms and facilities. A derogation for low-risk farms and facilities implies that those farms and facilities are inspected every 24 months rather than every year. Controls will have a strong risk-based focus.

Retailers that only sell pre-packaged organic products will not need certification but will be subjected to the checks of the general official controls legislation. Additionally, Member States can decide to exempt from certification farmers who sell small quantities of organic products directly to the final consumer as well as very small operators who sell directly unpacked organic products (other than feed) to the final consumer.

A topic that was heavily debated during the legislative process was related to the actions to be taken when residues of non-allowed substances are detected on organic products. Member States have different procedures, and an agreement has not been found. Therefore, Member States can continue applying their national approaches until the topic is discussed again, after 2021.

Changes concerning imports

In the new regulation, there will be two systems to import organic products from outside the EU:

– Trade agreements: most third countries that currently have equivalence arrangements with the EU will have to renegotiate the terms through formal trade agreements. Under the current system, thirteen third countries have unilateral or bilateral equivalence arrangements with the EU: Argentina, Australia, Canada,

[1] The new EU Organic Regulation introduces changes at various levels, but this chapter describes only the main ones referring to controls and trade.
[2] Development Assistance Committee (DAC) list of Official Development Assistance (ODA) recipients: http://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/daclist.htm

Chile, Costa Rica, India, Israel, Japan, New Zealand, Republic of Korea, Switzerland, Tunisia and United States of America.

– Certifiers: where there is not a trade agreement, the Commission will establish a list of recognised control bodies (or authorities) that will be authorised to perform controls and certification in third countries. The EU regulation will be implemented identically within the EU and outside the EU. Some flexibility will be allowed for the use of plant protection products and or fertilisers traditionally used in third countries.

Organic agriculture regulations worldwide: current situation

According to data collected by IFOAM – Organics International and FiBL, 68 countries had fully implemented organic regulations as of 2019. Eighteen countries had developed regulations, which are not fully implemented, while 17 were in the process of drafting legislation (Table 1).

Table 40: Regulations on organic agriculture: Number of countries by region (2019)

Region	Drafting	Fully Implemented	Not fully Implemented	Total
Africa	6	1	3	10
Asia	8	8	9	25
Europe	2	37	3	42
Latin America & Caribbean	1	16	3	20
North America		2		2
Oceania		4		4
Total	17	68	18	103

Source: IFOAM – Organics International

Australia and New Zealand have fully implemented regulations that apply to exports only. Consultations on whether and how organic production for the domestic market should also be regulated have been taking place in New Zealand since 2018, initiated by the government through the Ministry for Primary Industries.

India is a more complex case: with fully implemented regulations that apply to exports only, the country is developing a new regulation that also applies to the domestic sector. New legislation was approved at the end of 2017 and enforcement was foreseen to begin in 2018. Currently, various implementation rules are still being developed; therefore, the classification for the country in Table 41 refers only to the legal framework for organic exports.

Participatory Guarantee Systems (PGS) are recognised as systems to verify compliance with standards within the legal framework for organic agriculture of 10

countries with fully implemented regulations (see also chapter by Katto-Andrighetto et al. in this volume on page 164).[1]

Regional standards are adopted by 48 countries. For the 28 countries in the EU, this takes place within the framework of a compulsory regional regulation: the EU regulation on organic production. For the remaining 20 countries, this is in reference to their endorsement of regional voluntary standards: the East African Organic Agriculture Standard (EAOPS) and the Pacific Organic Standard (POS). The EAOPS was adopted by the East African Community in April 2007 and thereby became an official (but voluntary) standard for Burundi, Kenya, Rwanda, Tanzania and Uganda. The POS has been endorsed by the Conference of Pacific Ministers of Agriculture and Fisheries, which includes 15 member countries, and provides a platform for further regional policy development. New Caledonia and French Polynesia[2] have developed and are implementing regulations adopting the POS.

Data on regulations around the world were collected from various authorities and experts. The categorisation of regulations as being "not fully implemented" or "fully implemented" was based directly on the feedback from the persons interviewed, and some of the information was subject to verification. The indication "not fully implemented" relates to countries that

(a) have only recently adopted legislation and are still in the process of finalising its implementation (for example Belarus and Ukraine, where new organic regulations officially entered into force in 2019) and
(b) have developed and adopted legislation but are not providing the resources necessary for its implementation.

For some countries, we did not receive any information, and therefore we have no data to provide.

Table 41 shows the list of countries and the current status of their regulations on organic agriculture (drafting, fully implemented or not fully implemented) as well as relevant remarks where appropriate (if the regulations apply for exports only; if regional voluntary standards or compulsory regulation are in place; and if PGS are recognised).

Organic standards that are endorsed by the international organic movement are listed in the IFOAM Family of Standards. Private standards, national regulations and regional standard are admissible for the IFOAM Family of Standards.[3]

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[1] PGS recognition is also considered by some of the countries that are drafting regulations or where recently approved regulations are not yet fully implemented, but they were not considered in this overview. This is the case for example for India and Mongolia.
[2] Overseas collectivity of the French Republic and its sole overseas country, but exempted from compliance with the EU organic regulation.
[3] Information on the organic guarantee system of IFOAM is available at www.ifoam.org/ogs, information on the IFOAM Family of Standards at https://www.ifoam.bio/en/ifoam-family-standards-0.

Please send comments or information about countries that are not listed to Flávia Moura e Castro (f.castro@ifoam.bio).

Harmonisation and equivalence: The Organic Equivalence Tracker

In 2019, IFOAM - Organics International launched the Organic Equivalence Tracker, an online global list of equivalence arrangements for organic products between government trade partners.

An equivalence arrangement is the mechanism enabling trade of organic products between countries that have adopted organic regulations. The main effect of an equivalence arrangement is the acknowledgement that the regulations of the exporting country are equivalent insofar as they are deemed to meet the objectives of the importing country's organic regulation. Equivalence arrangements can be:

- Unilateral: one country deciding the equivalence of another country's regulation without reciprocation; or
- Bilateral: reciprocal equivalence of each other's regulations.

IFOAM – Organics International has been promoting harmonisation and equivalence in organic agriculture since 2002, in partnership with the UN Food and Agricultural Organization (FAO) and UN Conference on Trade and Development (UNCTAD), through various international events and projects.[1] Networks of government and private sector stakeholders were built around the topic, raising the profile of the issue and facilitating solutions and recommendations for trade facilitation. Having tracked the development of equivalence arrangements in the past decades, we can now make this information available as a relevant online tool for governments, traders, researchers and policy advocates interested in the trade of organic products.

The Organic Equivalence Tracker is organised as an interactive table displaying all countries participating in unilateral and bilateral arrangements. There are currently 17 entries: 16 countries as well as the European Union (EU) as one entity, which includes all 36 full members of the European cooperation for Accreditation.[2] It also includes information on trade facilitation measures between countries that have not stipulated any equivalence arrangements but nevertheless adopt provisions facilitating inter-country trade. For instance, the United States recognises governments of some trading partners to provide oversight of domestic certification bodies for the provision of the National Organic Program (NOP) certification within their respective jurisdictions for the purpose of exporting to the United States.

To access the Organic Equivalence Tracker, please visit the website: https://www.ifoam.bio/en/organic-equivalence-tracker

[1] Particularly worthy of notice are the sequential projects, the International Task Force on Harmonization and Equivalence in Organic Agriculture (2003-2008) and the Global Organic Market Access project (2009-2012).
[2] For more information, please visit: https://european-accreditation.org/

The Equivalence Tracker is a living tool that will be updated constantly by our Policy & Guarantee team at IFOAM - Organics International. We also encourage the submission of updates from sector experts: this can be done by contacting Joelle Katto-Andrighetto at j.katto@ifoam.bio.

Literature and 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; Consolidated version: http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:02007R0834-20130701

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Regulation (EU) 2018/848 of the European Parliament and of the Council of 30 May 2018 on organic production and labelling of organic products and repealing Council Regulation (EC) No 834/2007); Consolidated version: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:02018R0848-20180614

Table 41: Regulations on organic agriculture: Current status by country

Region	Country	Status of regulations on organic agriculture	Relevant Remarks
Africa	Algeria	Not fully Implemented	
	Burundi		Regional voluntary standards (EAOPS)
	Cameroon	Drafting	
	Egypt	Drafting	
	Ethiopia	Not fully Implemented	
	Kenya		Regional voluntary standards (EAOPS)
	Madagascar	Drafting	
	Mauritius	Drafting	
	Morocco	Not fully Implemented	
	Rwanda		Regional voluntary standards (EAOPS)
	South Africa	Drafting	
	Sudan	Drafting	
	Tanzania		Regional voluntary standards (EAOPS)
	Tunisia	Fully Implemented	
	Uganda		Regional voluntary standards (EAOPS)
Asia	Armenia	Not fully Implemented	
	Azerbaijan	Not fully Implemented	
	Bangladesh	Drafting	
Asia	Bhutan	Drafting	
	Cambodia	Drafting	
	China	Fully Implemented	
	India	Fully Implemented	Only for export.
	Indonesia	Fully Implemented	
	Iran	Not fully Implemented	

Region	Country	Status of regulations on organic agriculture	Relevant Remarks
	Israel	Fully Implemented	
	Japan	Fully Implemented	
	Jordan	Drafting	
	Kazakhstan	Not fully Implemented	
	Kyrgyzstan	Drafting	
	Malaysia	Fully Implemented	
	Mongolia	Not fully implemented	
	Nepal	Drafting	
	Pakistan	Drafting	
	Philippines	Not fully Implemented	
	Republic of Korea	Fully Implemented	
	Saudi Arabia	Not fully implemented	
	Sri Lanka	Drafting	
	Taiwan	Not fully Implemented	
	Tajikistan	Not fully Implemented	
	United Arab Emirates	Fully Implemented	
Europe	Albania	Fully Implemented	
	Austria	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Belarus	Not fully implemented	
	Belgium	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Bosnia & Herzegovina	Drafting	
	Bulgaria	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Croatia	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Cyprus	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Czech Republic	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Denmark	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Estonia	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Finland	Fully Implemented	Regional compulsory regulation (EU Regulation)
	France	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Georgia	Fully Implemented	
	Germany	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Greece	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Hungary	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Iceland	Fully Implemented	
	Ireland	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Italy	Fully Implemented	Regional compulsory regulation (EU Regulation)
Europe	Kosovo	Not fully Implemented	
	Latvia	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Liechtenstein	Fully Implemented	
	Lithuania	Fully Implemented	Regional compulsory regulation (EU Regulation)

Region	Country	Status of regulations on organic agriculture	Relevant Remarks
	Luxemburg	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Malta	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Montenegro	Fully Implemented	
	Netherlands	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Norway	Fully Implemented	
	Poland	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Portugal	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Romania	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Russia	Drafting	
	Serbia	Fully Implemented	
	Slovak Republic	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Slovenia	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Spain	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Sweden	Fully Implemented	Regional compulsory regulation (EU Regulation)
	Switzerland	Fully Implemented	
	Turkey	Fully Implemented	
	Ukraine	Not fully Implemented	
	United Kingdom	Fully Implemented	Regional compulsory regulation (EU Regulation)
Latin America & Caribbean	Antigua and Barbuda		
	Argentina	Fully Implemented	
	Bolivia	Fully Implemented	PGS recognition.
	Brazil	Fully Implemented	PGS recognition.
	Chile	Fully Implemented	PGS recognition.
	Colombia	Fully Implemented	
	Costa Rica	Fully Implemented	PGS recognition.
	Cuba	Not fully Implemented	
	Dominican Republic	Fully Implemented	
	Ecuador	Fully Implemented	PGS recognition.
	El Salvador	Not fully Implemented	
	Guatemala	Fully Implemented	
	Honduras	Fully Implemented	
	Mexico	Fully Implemented	PGS recognition.
	Nicaragua	Fully Implemented	
	Panama	Fully Implemented	
	Paraguay	Fully Implemented	PGS recognition.
	Peru	Fully Implemented	
	St. Lucia	Drafting	
	Uruguay	Fully Implemented	PGS recognition.
Latin America	Venezuela	Not Fully Implemented	
	Canada	Fully Implemented	
	USA	Fully Implemented	
Oceania	Australia	Fully Implemented	Only for export.
	Fiji		Regional voluntary standards (POS)

Region	Country	Status of regulations on organic agriculture	Relevant Remarks
	French Polynesia	Fully Implemented	Regional voluntary standards (POS); PGS Recognition.
	Kiribati (Micronesia)		Regional voluntary standards (POS)
	Marshall Islands		Regional voluntary standards (POS)
	Micronesia		Regional voluntary standards (POS)
	Nauru		Regional voluntary standards (POS)
	New Caledonia	Fully Implemented	Regional voluntary standards (POS); PGS recognition.
	New Zealand	Fully Implemented	Only for export.
	Niue		Regional voluntary standards (POS)
	Palau		Regional voluntary standards (POS)
	Papua New Guinea		Regional voluntary standards (POS)
	Samoa		Regional voluntary standards (POS)
	Solomon Islands		Regional voluntary standards (POS)
	Tonga		Regional voluntary standards (POS)
	Tuvalu		Regional voluntary standards (POS)
	Vanuatu		Regional voluntary standards (POS)

Source: IFOAM – Organics International
EU Regulation = EU Regulation on organic agriculture, EAOPS = East African Organic Agriculture Standard; POS - Pacific Organic Standard

Please send comments or information about changes and countries that are not listed to Flávia Moura e Castro (f.castro@ifoam.bio).

Internal Control Systems in Organic Agriculture: Significance, Opportunities and Challenges

FLORENTINE MEINSHAUSEN,[1] TORALF RICHTER,[2] BEATE HUBER, [3] JOHAN BLOCKEEL[4]

Importance of group certification

In the recent study "Group Certification: Internal Control Systems in Organic Agriculture: Significance, Opportunities and Challenges" FiBL and IFOAM examined the current scale and scope of group certification by region and country (Meinshausen et al. 2019).[5] According to FiBL estimates, about 80 percent of the world's organic producers are smallholders in low and middle-income countries, for whom individual certification would be unaffordable and administratively too complex to manage. These producers are recognised as organic due to group certification, a system in which groups of farmers implement an Internal Control System (ICS) and are certified by a third-party certification body, which assesses the performance of the ICS and performs a representative number of spot-check inspections of group members.

The approach of ICS-based group certification was pioneered by IFOAM – Organics International (IFOAM) over the past twenty years and has been adopted by the entire organic sector, including the EU and the US National Organic Programme. Group certification is the only way that smallholder farmers in low-income countries can access certified international markets, and besides reducing certification costs and complexity, it also provides other important economic and social benefits.

The global scale of group certification

There are presently no available official statistics about ICS certified producer groups. The relevant databases and certified operator lists mostly do not specifically identify producer groups, nor the number of producers within them.

Hence, different data source and extrapolation had to be used to collate data about the scope and spread of ICS groups (see Figure 54, Figure 55). These estimates suggest that there are about 2.6 million organic producers organised in around 5'900 ICS

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[5] The FiBL study "Group Certification Internal Control Systems in Organic Agriculture: Significance, Opportunities and Challenges" can be downloaded at https://orgprints.org/35159

groups in 58 countries (mainly in Africa, Asia and Latin America), covering a total area of around 4.5 million ha of certified organic land.

Figure 54: Estimated global organic group certification

Source: FiBL and IFOAM – Organics International

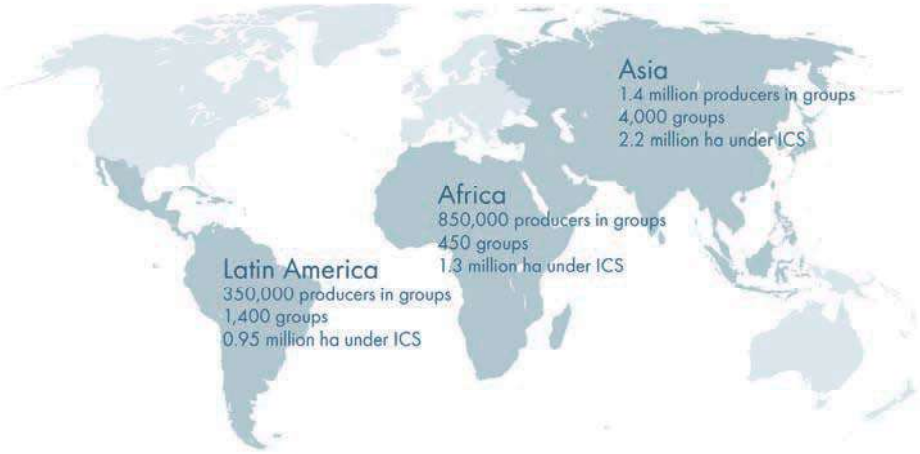

Figure 55: Estimated global organic group certification per region

Source: FiBL and IFOAM – Organics International

The main products sold by ICS-certified groups are coffee and cocoa, but these groups supply many other important commodities (see Figure 56). The size of groups can vary greatly between different regions and from country to country. The biggest groups are found in Africa, where groups with more than 10'000 farmers are not uncommon. Farms in organic groups have a typical size of 1-4 hectares, depending on the region, but many groups also include some medium-sized and large farms.

Figure 56: Most important crops certified by group certification

Source: FiBL and IFOAM – Organics International

The need to harmonise and strengthen group certification requirements

Results of a stakeholder survey and the expert interviews in the frame of the FiBL study showed that they consider most elements of organic group certification to be „important" or „very important" and that they are generally implemented „well" or „quite well". However, the interviews also highlighted various challenges and a need for more guidance or stronger criteria in some areas in order to ensure consistent application of the requirements. This is particularly relevant as the new EU regulation on organic production (EU) 2018/848 (published in 2018 and coming into force in 2021) will allow group certification of small farms anywhere in the world, including the EU. The details about how to control and implement these rules are being elaborated (see chapter by Busacca et al. on page 150).

The FiBL study further concludes that it is very important that organic regulations define group certification as a separate „scope", with specific control procedures and competency requirements for certification bodies, in a similar way to which there are

specific requirements for the certification of processing or feedstuff operations since ICS are more complex than certifying individual farms or enterprises and require additional skill sets. This would strengthen oversight by accreditation bodies and competent authorities and help to achieve transparency and reporting on group certification data. It is also mentioned in the study that there is a need for more explicit guidance on the following aspects of group certification.

- **Size of producer groups:** As groups can be very large (> 10'000 farms in one group), it could be important to have clear rules on the maximum size of a certified group, and/or how large groups can be organised into homogenous subgroups and the related sampling rules for external controls.
- **Size of member farms in groups:** Definitions of farm size and ways of controlling medium and large farms in different group settings should be defined in more detail in order to harmonise inspection procedures among the certification bodies.
- **Farm extension and capacity building:** Training on how to implement organic principles in practice is crucial for the long-term success and compliance of organic groups. There should be more explicit requirements to include these aspects as part of the group certification process. As part of this process, consideration should be given to allowing the same field officer to conduct internal inspections and to provide advisory/training services, as this would facilitate capacity building, especially within groups with a very limited ICS budget.
- **Reliable basic farm data is essential,** especially regarding the size and location of the farm fields and crop data in order to monitor and control. Gathering this data is a major challenge for many groups. It would be helpful to provide groups with adequate digital tools and training to improve data management. Useful lessons in this respect can be learned from the efforts of other standards such as Rainforest Alliance/UTZ. It is also important to make the data collected for the ICS more useful and relevant for farmers and the group so that groups see data gathering as beneficial for them rather than merely a certification requirement.
- **External control of groups:** Additional guidance and more explicit rules are needed to ensure more consistent application of group certification requirements. In particular, consideration should be given to establishing audit protocols and rules to ensure that the relatively few external farm inspections are done thoroughly. One mechanism for doing this would be by introducing clear rules, such as a maximum number of audits per day, as is done in other sustainability standards. This would create a level playing field between certifiers and prevent cost (and quality) cutting. More guidance is also needed on dealing with non-conformities and sanctions for the group in order to harmonise the application of control standards.

The international rules for group certification are changing

The new EU Organic Regulation (EU) 2018/848 (Basic Act) as published in 2018 includes basic rules for the certification of grower groups which will apply from 2021 onwards to all organic "groups of operators", both in the EU and worldwide.

The EU has taken up the findings and recommendations of the FiBL study with great interest. IFOAM - Organics International has led a project to strengthen group certification requirements internationally and worked with IFOAM EU on a joint position to achieve strengthened meaningful new requirements for groups. The Commission and the Member States are currently working on secondary legislation which will, in addition to the Basic Act requirements, re-define the rules for group certification.

The details are not yet finalised, but some fundamental changes to the rules and conditions for group certification can be expected. There may be a maximum number of farms per group and a higher external control rate. It is very likely that only organic farms which meet the size restrictions of the Regulation and who are organised in a separate legal entity can be certified as a "group of operators", which would affect all processor/exporter-led groups, but also federations of cooperatives as well as all cooperatives who also have non-organic or larger organic farm members. The requirements for the internal control system and the control procedures will also be defined in more detail.

According to IFOAM's analysis, some of the proposed changes will help to improve the transparency and quality of group certification. However, there is also widespread concern that the new legal requirements will have a substantial negative impact on millions of small-farmers all around the world as groups would need to spend their scarce resources not on much-needed farmers training and support, but on expensive legal registration and administration procedures and higher external control costs. The new requirements would differ substantially from those of other organic regulations and important voluntary certification schemes; hence implementation will be confusing and inconsistent.

Literature

Meinshausen, Florentine; Richter, Toralf; Blockeel, Johan and Huber, Beate (2019): Group Certification. Internal Control Systems in Organic Agriculture: Significance, Opportunities and Challenges. Research Institute of Organic Agriculture FiBL, Frick. https://orgprints.org/35159/

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Further reading

The chapter "Group Certification: Market Access for Smallholder Agriculture" in a book published by Springer on sustainable global value chains comprehensively explains the concept of group certification and all relevant terminologies (Steidle/Herrmann 2019). It further provides an overview on where the concept stems from, which chances and challenges emerge from it and suggests that training combined with the use of modern, affordable ICT tools is crucial for group certification to work in a sustainable and credible fashion. https://link.springer.com/chapter/10.1007/978-3-319-14877-9_34

Steidle M., Herrmann G.A. (2019) Group Certification: Market Access for Smallholder Agriculture. In: Schmidt M., Giovannucci D., Palekhov D., Hansmann B. (eds) Sustainable Global Value Chains. Natural Resource Management in Transition, vol 2. Springer, Cham. https://link.springer.com/chapter/10.1007/978-3-319-14877-9_34

Participatory Guarantee Systems in 2019

Joelle Katto-Andrighetto,[1] Cornelia Kirchner,[2] Flávia Moura e Castro,[3] and Federica Varini[4]

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[5]). PGS are particularly suitable for small-scale farmers and local markets. In 2004, IFOAM – Organics International organised, in cooperation with MAELA (Latin American Agroecology Movement), the first international workshop on alternative certification in Torres (Brazil), which brought together initiatives from various continents to discuss the common grounds between various approaches and needs behind alternative certification systems. An important outcome was the birth of "Participatory Guarantee Systems" as a concept and the creation of an international task force on PGS, now the permanent IFOAM PGS Committee. Since then, the number of PGS initiatives and producers involved in them has been growing on all continents, and they now represent a well-established guarantee system for Organic Agriculture in many countries (for definitions see the end of the article). In 2019, ten countries had recognised PGS as a guarantee system to ensure the organic quality of products at the national level.[6]

IFOAM – Organics International is the only organisation collecting data about PGS on a global level. To date,[7] we have recorded in our PGS database 223 PGS initiatives in 76 countries, with at least 567'142 producers involved and 496'104 producers certified.

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[4] Federica Varini, IFOAM – Organics International, 53113 Bonn, Germany, f.varini@ifoam.bio, www.ifoam.bio

[5] More information about the IFOAM definition of organic agriculture is available on the IFOAM website at https://www.ifoam.bio/en/organic-landmarks/definition-organic-agriculture. A definition of PGS is available at https://www.ifoam.bio/en/organic-policy-guarantee/participatory-guarantee-systems-pgs,

[6] These countries are Bolivia, Brazil, Chile, Costa Rica, Ecuador, Mexico, Paraguay, Uruguay, French Polynesia and New Caledonia. PGS recognition is also considered by some of the countries that are drafting regulations or where recently approved regulations are not yet fully implemented, but they were not considered in this overview. For example, this is the case for India and Mongolia.

[7] Data compiled in October 2019.

Development of PGS-certified producers worldwide
Source: IFOAM – Organics International 2019

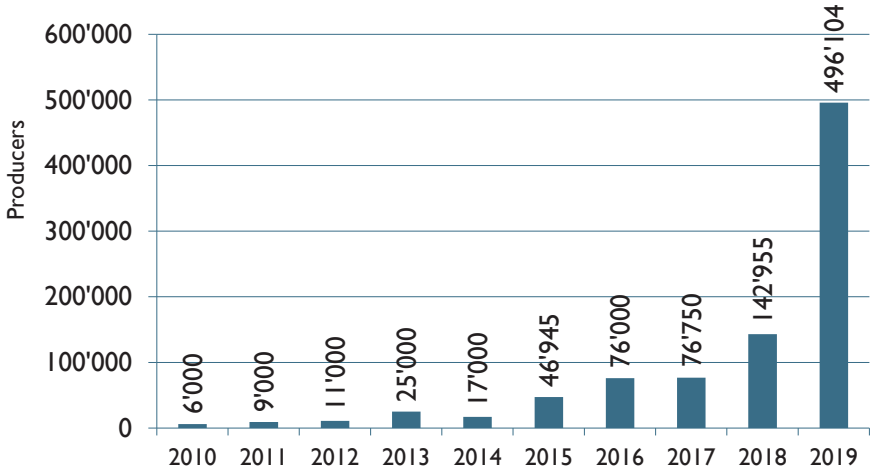

Figure 57: Development of PGS-certified producers worldwide

Source: IFOAM – Organics International

The highest number of producers involved in PGS can be found in India, where according to the data from the Indian Ministry of Agriculture and Farmers Welfare, a total of 509'351 producers are involved in PGS. At least 471'007 of them are certified producers, which represents a growth of 316.5% compared to the number of certified producers in 2018. They cultivate a total PGS certified area of 371'276 hectares. Worldwide, there are only eight other countries with more than 1'000 producers certified by PGS: Brazil (6'309), Thailand (2'110), Uganda (2'044), Peru (1'790), Bolivia (1'287), Vanuatu (1'284), France (1'144) and Fiji (1'111).

Regional development

Asia

Asia counts more PGS producers than any other region, with at least 521'381 producers involved, of which 475'663 are certified (+311.6% compared to 2018). This development is related to the expansion of PGS in the whole region in the past years, but it is mostly due to the sharp increase in the number of farmers joining the governmental initiative PGS-India implemented by the National Center of Organic Farming (NCOF).[1] After India, the highest numbers for producers involved in PGS in Asia are found in the Philippines (2'440) and South Korea (2'000). In terms of certified

[1] The number of certified producers and the hectares certified organic by PGS-India are constantly updated on the national PGS platform: https://www.pgsindia-ncof.gov.in/

producers, Thailand (2'110) has the second-highest number in the region, after India. Furthermore, Asia has the second-highest number of PGS initiatives operational (35) compared to other regions.

Latin and Central America

Latin and Central America, which has 11'058 certified producers (-39.3% compared to 2018) among 22'147 producers involved, is the region with the highest number of operational PGS initiatives: 81 in total (8% growth rate compared to 2018). Brazil (26) has the most, followed by Chile (14), which has seen an increase of more than 114.3% in operational initiatives between 2017 and 2018.

Bolivia experienced a decrease in the number of producers certified and involved, respectively, with a decrease of 84.2% and 72.1%. The decrease could be linked to difficulties PGS initiatives have been facing in the past two years in order to fulfil the requirements and pay the costs to obtain or renew their official recognition with the competent authority, SENASAG.

Brazil is now the country in the region with the highest number of producers certified (6'309). In 2019, Brazil and Chile implemented the first bilateral equivalence agreement on organic production in the region (see article by Flores on page 266). This is the first bilateral equivalence agreement Brazil has ever signed and the first in the world to recognise, without restrictions, both third-party and PGS as guarantee systems for organic certification.

Peru, where PGS have been implemented for the past 15 years, is the country with the second-highest number of producers certified (at least 1790 producers certified) in the region. In 2019, the government launched a public consultation on the regulation of organic certification, which recognises and regulates PGS ("Proyecto de Decreto Supremo que aprueba el Reglamento de Certificación y Fiscalización de la Producción Orgánica y su Exposición de Motivos"). Various PGS stakeholders, gathered during the X National PGS Meeting in May 2019, discussed the proposed regulation and agreed on a series of amendments that were then submitted to the competent authority, SENASA, and supported by IFOAM – Organics International. The Decree has not yet been released, and it is not expected before early 2020.

Africa

It is estimated that in Africa there are 16'353 producers involved, 4'188 of whom are certified. Nine PGS initiatives are under development in the region, and 17 are operational. This represents a decrease in the number of initiatives compared to what we reported in 2017 and the previous years. This decrease is related to the consolidation of various PGS groups (previously included in the survey as PGS initiatives) under fewer National PGS initiatives, especially in East Africa where the National Organic Agriculture Movements are operating as oversight bodies for the national PGS groups.

Several new West African countries appear in the survey in 2019. In Ghana, Togo and São Tomé and Principe, PGS initiatives have been starting to formalise thanks also to

the support of the project Organic Market for Development (OM4D)[1], which aims – among other things – to link producers directly to local consumers by setting up and promoting PGS as an affordable alternative to third party certification for domestic markets.

Oceania

In Oceania, there are at least 3'462 producers involved. Of these, 9'912 are certified, which represents an increase of 10.6 percent compared to the figures for 2018. This is mostly related to developments in Vanuatu, which is now the country in the region with the highest number of PGS-certified producers (1'284), followed by Fiji (1'111).

North America

Due to an unfavourable legal framework, PGS initiatives are less widespread in North America, where the figures tend to be stable over the years. In the USA there is one single PGS, Certified Naturally Grown[2], which offers certification to farmers and beekeepers producing food for their local communities by working in harmony with nature, without relying on synthetic chemicals or GMOs. More than 655 farmers and beekeepers throughout the United States and Canada are certified through this system.

Europe

In Europe, we have seen an increase compared to data reported for 2018, with 2'032 producers involved, the majority of which are located in France where 1'144 are certified producers (+14.7 percent compared to 2017). In European countries, it is quite widespread that organic PGS-certified producers also have a third-party certification and can thus access official organic markets. Currently, at least 30 PGS initiatives can be found in at least ten countries. At the national level, both in Spain and France, different PGS initiatives have been moving towards the creation of formal national networks of PGS initiatives. Despite the different contexts, in both countries the push to build such network comes from the desire to increase mutual support between initiatives, sharing knowledge and products as well as strengthening advocacy for PGS at the local and national scale.

Thanks to the implementation of the EATingCRAFT[3] project – the first transnational project on PGS in Europe – several new European countries, led by local Civil Society

[1] This project is funded by the Dutch Ministry of Foreign Affairs, to learn more visit: https://www.ifoam.bio/en/OM4D
[2] To learn more about this initiative, visit their website https://www.cngfarming.org/
[3] The Education Towards the Creation of Alternative Food Networks project (EATingCRAFT) is funded by the European Union under the Erasmus + program. To learn more visit: https://www.ifoam.bio/en/eatingcraft-education-towards-creation-alternative-food-networks

Organisations working on CSA[1], experimented with the possibility of establishing PGS initiatives in 2019 (Czech Republic, Hungary and Greece).

General notes on the data

Every two years IFOAM – Organics International conducts a global PGS survey. The last survey was conducted in 2019; therefore, the figures for most of the PGS are from October 2019. Additional data were collected through bilateral communication with PGS initiatives, competent authorities and PGS experts. If new data is not received, data from the previous year or older data is used, unless no update is provided for several years. In such cases, initiatives might be considered no longer active and thus excluded from the current statistics. When PGS are recognised under a national organic regulation, data that is collected and published by competent authorities is used. This is the case in Brazil,[2] Chile,[3] Bolivia,[4] Costa Rica,[5] Mexico,[6] and India.[7]

Definitions used

PGS initiative: Entity or organisation that has defined/chosen/adopted a common set of standards for organic agriculture and a common set of procedures (i.e. they have a common manual describing those procedures), and that has a coordination body (i.e. secretary, association) that has the overview of the data coming from the regional/subgroups, local groups or the individual farmers directly. A PGS initiative will also typically use one common label to identify the products of their farmers as organic and/or a logo that is used by other PGS initiatives, such as a national/regional organic logo.

Explanatory note: A PGS initiative can be composed of one single local group, especially at the initial stage of development. Even though it is common for PGS initiatives to be composed of various local groups, it is also possible that the PGS producers in a PGS initiative work together based on geographic proximity or technical expertise, without forming a local group.

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[1] CSA = Community-supported agriculture is a system that connects producers and consumers by allowing the consumer to subscribe to the harvest of a certain farm or group of farms.

[2] Ministério da Agricultura, Pecuária e Abastecimento, Brasil: Cadastro Nacional de Produtores Orgânicos. Available at http://www.agricultura.gov.br/assuntos/sustentabilidade/organicos/cadastro-nacional-produtores-organicos

[3] Servicio Agrícola y Ganadero, Chile: Certificación de Productos orgánicos. Available at http://www.sag.cl/ambitos-de-accion/certificacion-de-productos-organicos/132/registros

[4] Consejo Nacional de Producción Ecológica (UC-CNAPE), email communication, data for 2016.

[5] Servicio Fitosanitario del Estado, MAG, Costa Rica: Lista Oficial de Grupos en Certificación Participativa. Available at https://www.sfe.go.cr/DocsARAO/Lista_inscritos_Certificacion_Participativa.pdf

[6] Servicio Nacional de Sanidad, Inocuidad y Calidad Agroalimentaria, Mexico: Padrón de Organismos de Certificación Participativa de productos orgánicos a pequeños productores y producción familiar. Available at https://www.gob.mx/senasica/documentos/padron-de-organismos-reconocidos-para-otorgar-certificacion-participativa-de-productos-organicos-a-pequenos-productores

[7] Department of Agriculture & Cooperation, India: Participatory Guarantee System for India. Available at http://pgsindia-ncof.gov.in

PGS status: Setting up a PGS is a long process and requires two or more years before the producers involved can be fully certified. In our data collection, we distinguish between two situations:

(c) **Operational PGS**: a PGS that is implementing a functional certification system to certify their producers and has granted at least one certificate to one farmer.
(d) **PGS under development**: a PGS that is in the process of developing a functional certification system to certify their producers and has not yet emitted any certificates.

Number of producers within a PGS: There are two categories of producers considered for a PGS initiative:

(a) **Producers involved**: Farmers and processors that are involved in a PGS either as certified or as not having yet received certification, including those that are in the process of conversion and that are expecting/intending to get a PGS certificate in the near future.
(b) **Producers certified**: Farmers and processors that have been verified through a PGS and that have received a PGS certificate or a proof of certification, if they are approved as part of a group within a PGS initiative.

Table 42: PGS Statistics 2018 and 2019

	Producers certified 2018	Producers certified 2019	Producers involved 2018	Producers involved 2019	PGS operational 2018	PGS operational 2019	PGS under dev 2018	PGS under dev 2019	PGS-certified land 2019 (ha)
AFRCIA TOTAL	**4'650**	**4'188**	**17'795**	**16'353**	**33**	**17**	**25**	**9**	**1'112**
Benin	177	228	306	586	1	1	0	0	164
Burkina Faso	371	286	371	536	1	1	0	0	57
Burundi	0	0	2'027	3'110	0	0	1	1	0
Ethiopia	0	0	30	30	0	0	1	1	0
Ghana	0	0	0	0	0	0		1	0
Kenya	178	178	930	1'337	6	1	9	0	0
Mali	0	50	0	150	0	1	0	0	0
Mauritius	0	0	0	0	0	0	0	1	0
Morocco	0	27	30	27	0	1	1	0	352
Mozambique	19	18	90	90	1	1	0	0	0
Namibia	6	4	10	11	1	1	0	0	23
Nigeria	47	0	47	0	1	0	0	0	0
Rwanda	0	0	315	315	0	0	1	1	0
Sao Tome	0	0	0	20	0	0	0	1	0
Senegal	0	291	500	497	0	1	1	0	370
South Africa	271	532	371	360	4	6	5	2	140
Tanzania	515	515	2045	2'045	3	1	0	0	0
Togo		0		0		0		1	0
Uganda	2'216	2'044	9'273	7'224	14	1	6		
Zimbabwe	850	15	1'450	15	1	1	0	0	6
ASIA TOTAL	**115'549**	**475'663**	**342'799**	**521'381**	**29**	**35**	**38**	**26**	**378'478**
Bangladesh	0	0	123	123	0	0	1	1	0
Bhutan	0	0	100	100	0	0	1	1	0
Cambodia	177	112	222	249	4	4	3	5	23
China	0	0	167	1000	0	0	4	1	0
India	113'090	471'007	333'144	509'351	2	2	0	0	371'276

Standards, Legislation, Policies > PGS

	Producers certified 2018	Producers certified 2019	Producers involved 2018	Producers involved 2019	PGS operational 2018	PGS operational 2019	PGS under dev 2018	PGS under dev 2019	PGS-certified land 2019 (ha)
Indonesia	147	142	781	425	2	1	0	0	0
Japan	4	5	7	8	0	1	1	1	2
Kyrgyzstan	0	682	822	855	0	1	1	0	0
Laos	86	310	288	495	1	2	2	1	773
Myanmar	44	304	110	304	1	1	7	0	379
Nepal	39	39	300	373	3	3	1	1	66
Pakistan	0	0	0	0	0	0	1	1	0
Philippines	266	245	1970	2440	5	7	9	9	346
South Korea	114	250	2000	2000	1	1	0	0	0
Sri Lanka	111	155	756	756	1	1	1	1	222
Taiwan	60	60	60	60	1	1	0	0	0
Thailand	1116	2110	1611	2110	5	6	6	1	5363
Vietnam	295	242	338	732	3	4	0	2	28
Mongolia		0		0		0		1	0
EUROPE	**1'127**	**1'612**	**1'394**	**2'032**	**6**	**18**	**7**	**12**	**1'700**
Belgium	80	80	191	191	1	1	1	1	0
Bosnia	0	0	0	5	0	0	1	1	0
Czech Republic	0	0	0	2	0	0	0	1	0
France	981	1144	1070	1214	1	3	0	2	250
Germany	0	0	0	100	0	0	0	1	0
Greece	0	0	0	0	0	0	0	1	0
Hungary	0	0	0	10	0	0	1	2	0
Italy	49	186	49	225	2	3	2	1	1'358
Spain	17	202	56	260	2	11	1	1	92
Turkey	0	0	28	25	0	0	1	1	0
LATIN AMERICA TOTAL	**18'220**	**11'058**	**23'418**	**22'147**	**75**	**81**	**15**	**7**	**9'096**
Argentina	20	20	40	40	1	1	1	1	170
Belize	0	0	5	5	0	0	1	1	0
Bolivia	8164	1287	9284	3395	1	4	0	0	190

	Producers certified 2018	Producers certified 2019	Producers involved 2018	Producers involved 2019	PGS operational 2018	PGS operational 2019	PGS under dev 2018	PGS under dev 2019	PGS-certified land 2019 (ha)
Brazil	5'401	6'309	5'401	7'105	26	26	0	0	2'564
Chile	233	233	233	233	15	14	0	0	908
Colombia	312	373	526	649	6	6	4	0	335
Costa Rica	31	32	82	85	5	5	0	0	154
Cuba	0	0	252	3712	0	0	1	1	0
Ecuador	765	637	2'578	1'877	4	4	1	0	80
Guatemala	0	25	0	50	0	1	1	0	1
Mexico	113	139	273	228	7	7	1	2	659
Paraguay	47	78	1'000	211	1	2	0	0	235
Peru	3'014	1'790	3'244	3947	8	10	4	0	3'250
Puerto Rico	0	0	0	10	0	0	1	1	0
Uruguay	120	135	500	500	1	1	0	0	550
Dominica	0	0	0	100	0	0	0	1	0
NORT AMERICA	**776**	**671**	**1767**	**1767**	**2**	**2**	**0**	**0**	**8'440**
Canada	16	16	17	17	1	1	0	0	0
USA	760	655	1'750	1'750	1	1	0	0	8'440
OCEANIA TOTAL	**2'633**	**2'912**	**3'905**	**3'462**	**11**	**13**	**4**	**3**	**7'214**
Australia	14	14	19	21	1	1	0	1	2'200
Cook Islands	0	10	13	10	0	1	1	0	20
Fiji	1'156	1'111	2'199	1'111	4	6	2	0	3'071
French Polynesia	14	265	14	295	1	1	0	0	167
Kiribati	0	0	120	120	1	0	0	1	0
New Caledonia	88	88	179	179	1	1	0	0	436
New Zealand	150	140	150	150	1	1	0	0	0
Samoa	0	0	0	0	0	0	1	1	0
Solomon Islands	27	0	27	76	1	1	0	0	50
Vanuatu	1'184	1'284	1'184	1'500	1	1	0	0	1'270
GLOBAL TOTAL	**142'955**	**496'104**	**391'078**	**567'142**	**156**	**166**	**89**	**57**	**406'040**

Source: IFOAM – Organics International

Demeter International – Current Statistics

CHRISTOPH SIMPFENDÖRFER[1] AND SARAH FISCHER[2]

Demeter is the only ecological association that has built up a network of individual certification organisations worldwide. In 1997, Demeter-International was founded for closer co-operation in the legal, economic and spiritual spheres. Presently, Demeter-International has 19 members and four guest-members from Europe, America, Africa, New Zealand and India. Thus Demeter-International represents more than 5'900 Demeter farmers with over 200'000 hectares in 63 countries (June 2019).

Demeter-International e.V. is a non-profit organisation, and its member organisations work together in the spirit of an international confederation with democratic principles. In order to become a member, it is necessary to have a functioning Demeter certification programme. Associations which support the objectives of Demeter-International can be elected as associated members. Demeter's basis is the Biodynamic agriculture method, originated by Rudolf Steiner in his "Agriculture Course" given in Koberwitz in 1924 and developed further in practice and research.

The main tasks of Demeter-International are

- Development and approval of International Demeter Standards for production and processing as minimum requirements for the worldwide trade of Demeter products,
- International registration and protection of the Demeter trademark,
- Certification of single farms/operations in countries without their own Demeter organisation,
- Harmonisation of the Demeter certification program worldwide,
- Commitment to advancing the public understanding and acceptance of the Biodynamic method in relevant international institutions,
- Support for the establishment of autonomous Biodynamic associations and Demeter organisations where none exist.

Demeter has seen continuous growth in certified farms over the past decades. Since the turn of the millennium, the number of Demeter farms worldwide has increased by around 2'500 to almost 5'400 in 2018 (Figure 58) and the certified area almost doubled (Figure 59). Germany is the country with the largest area and has the highest number of producers (Table 43, Table 44).

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The latest developments show a strong interest in Demeter certification. As a result of growth in recent years, more than 200'000 hectares (June 2019) are now under biodynamic management and have Demeter certification. Demeter bananas, for example, are currently a very dynamic sector. Due to the great interest in conversion and the newly created distribution channels, large areas have been converted to biodynamic cultivation.

Biodynamic viticulture is also becoming increasingly important. At present, around 760 wineries in Europe are Demeter-certified, led by France with 375 wineries. It is also gratifying that a winery has been certified in both Liechtenstein and Denmark. Internationally, Demeter wine comes mainly from Chile and Argentina. In total, around 15'000 hectares of the Demeter-certified area are biodynamic vineyards (Table 45).

Development of Demeter-certified farms worldwide 1997-2018

Source: Demeter-International 2019

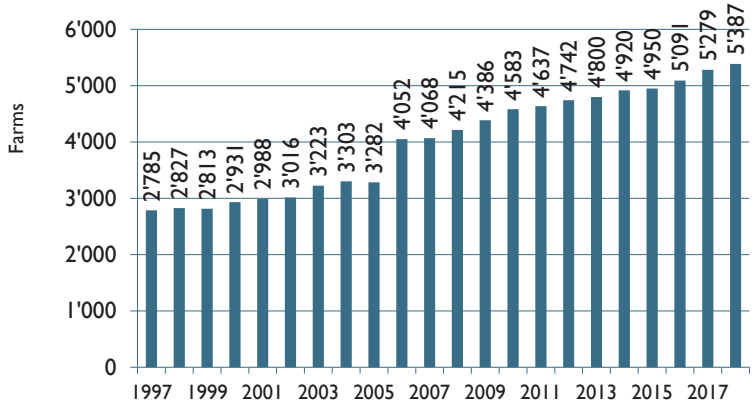

Figure 58: Development of the number of Demeter-certified farms

Source: Demeter International

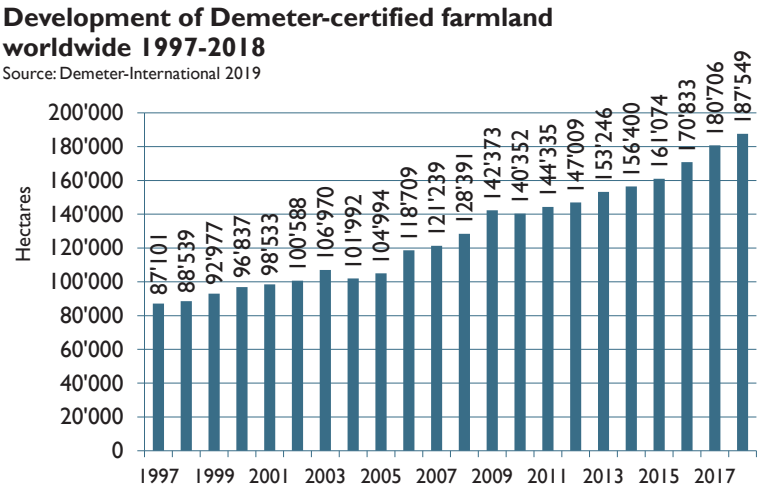

Figure 59: Development of the Demeter-certified area in hectares

Source: Demeter International

Table 43: Certified Demeter operations in member countries of Demeter-International (DI) as of June 2019

	Area (ha)	Farms	Processors	Distributors
Austria	7'164	231	43	0
Brazil	3'388	30	31	3
Denmark	2'998	43	11	14
Egypt	2'610	87	7	*0*
Finland	384	17	3	3
France	14'629	606	83	56
Germany	84'426	1'579	401	181
Great Britain	3'886	100	44	9
India	9'303	39	4	0
Italy	10'355	362	77	56
Luxembourg	536	8	2	0
The Netherlands	8'681	148	45	37
New Zealand	928	15	0	0
Norway	548	20	0	*0*
Slovenia	238	31	2	1
Spain	7'743	275	0	16
Sweden	873	17	6	6
Switzerland	5'070	297	*79*	60
USA	*9'001*	118	88	36
Total	**172'761**	**4'023**	**926**	**478**

Source: Demeter International

Table 44: Certified Demeter operations in other countries as of June 2019

	Area (ha)	Farms	Processors	Distributors
Argentina	1'187	38	6	1
Belgium	*143*	8	4	1
Bulgaria	0	0	0	1
Chile	1'474	23	0	3
China	108	7	1	1
Colombia	106	1	0	0
Costa Rica	*11*	2	0	1
Croatia	68	1	0	0
Czech Republic	3'537	5	0	1
Dominican Rep.	1'410	14	1	1
Ecuador	512	3	1	1
Ethiopia	32	1	0	0
Greece	381	26	5	1
Guinea Bissau	694	1	0	0
Honduras	72	1	0	0
Hungary	6'371	27	1	2
Iran	72	1	0	0
Ireland	93	7	0	0
Israel	106	1	1	0
Japan	0	0	0	3
Kuwait	0	0	0	1
Liechtenstein	3	1	0	0
Lithuania	1'389	11	0	1
Malaysia	0	0	0	3
Mexico	304	6	0	1
Morocco	27	1	0	0
Nepal	118	96	0	0
Paraguay	996	52	0	0
Peru	307	8	1	1
Poland	4'261	17	0	0
Portugal	574	11	1	1
Romania	200	2	0	0
Serbia	35	2	1	0
Sicily	426	25	2	1
Slovakia	169	1	0	0
South Africa	245	24	0	1
Sri Lanka	1'479	1'204	1	0
Tunisia	699	112	1	0
Turkey	1'148	153	1	2
Uganda	527	2	0	0
United Arab Emirates	0	0	0	1
Vietnam	0	0	1	1
Total	**29'284**	**1'895**	**29**	**31**
Total certified operations*	**202'045**	**5'918**	**955**	**509**

**Total certified operations in member countries of Demeter-International (DI) and other countries*
Source: Demeter International

Table 45: Demeter certified vintners and grape area worldwide (certified by Demeter-International members)

Country	Farms	Cellars	Area (ha)
Austria	62	4	686
Denmark	1		1
France	375		6363
Germany	69 (fully certified)		620
Italy	132	7	1'544
Liechtenstein	1		2
New Zealand	6		108
Slovenia	11		92
Spain	53	1	2'126
Switzerland	55		340
United Kingdom	9	2	53
United States	58		1'314

Table 46: Demeter certified vintners and grape area worldwide (certified by Demeter-International)

Country	Farms	Cellars	Area (ha)
Argentina	11	1	288
Chile	20		1'012
Czech Republic	1		53
Greece	2		5
Hungary	6		32
Mexico	1		6
Portugal	1		3
South Africa	4		75
Total (certified by Demeter-International members and Demeter- International)	**809**		**14'724**

**Number of farms with grapes for wine*
***Number of certified cellars/wineries without their own land*
****Area (ha) with certified grapes for wine*
Source: Demeter-International

The Mainstreaming of Organic Agriculture in the Himalaya Region: Policy Contexts in Bhutan, India and Nepal[1][2]

FEDERICA VARINI[3]

Organic Agriculture delivers on preserving mountain livelihoods

In vast areas of Bhutan, Nepal, and the Indian Himalaya Region, traditional agriculture still represents the main occupation, agroecosystems remain predominantly untouched, and the disruptive effects of the Green Revolution remain minimal as a result of inaccessibility, marginality, and landscape characteristics. There are obvious incompatibilities between the needs of mountain agroecosystems and the precepts of industrial agriculture. Mountain agriculture is an integrated and holistic system fostered by abundant local resources and shaped by traditional knowledge and the ability to adapt to environmental hardships.

Over the last ten years, Bhutanese, Nepalese, and Indian policymakers have increasingly recognised the need to transition towards sustainable agricultural systems to preserve their natural resources and improve livelihoods for their rural populations. Political commitment has been implemented with varying intensity, including policies and programs with specific budget earmarks for measures supporting organic farming as a way of providing cultural-relevant intervention with benefits ranging from poverty alleviation to sustainable management.

Bhutan

Bhutan strives to be the world leader in environmental sustainability. Today it is the only carbon negative country worldwide, thanks also to a provision in its constitution that enforces the protection of its forest coverage. Political support for organic agriculture in Bhutan is consequent with this vision and began over a decade ago with the launch of the National Framework for Organic Farming in Bhutan (NFOFB) in 2006. As foreseen in the policy framework, the National Organic Program (NOP) was established in 2008. The NOP, with a full-time national coordinator and a dedicated unit within the Ministry of Agriculture and Forests (MoAF), ensures supervision and strategic foresight for the development and the implementation of the actions and programmes concerning the support of organic farming.

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[1] The Mainstreaming of Organic Agriculture and Agroecology in the Himalaya Region. Policy Contexts in Bhutan, India and Nepal. 2019. IFOAM – Organics International and World Future Council. Germany.

[2] See also chapter about organic agriculture in Asia in this volume, page 202).

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In 2012, Bhutan declared it would become a 100 percent organic state by the year 2020. Besides the protection of the environment, the aim of the government was also to build strategies to improve the economic conditions of its farmers, who are mostly organic by default and with one of the lower application rates of synthetic inputs worldwide, and to support them in reaching international organic markets while making the sustainable tourism sector even stronger.

Since then, the objective to turn Bhutan into an organic state has been supported by several different comprehensive policies and programs. In 2018 Bhutan reached more than 6000 hectares of organic agriculture land equal to 1.3 percent of the total agricultural land and 6.6 percent of the arable land. However, despite its pioneering vision, a recent assessment performed by the International Centre for Integrated Mountain Development (ICIMOD and MOAF 2018) at the request of the MOAF concluded that Bhutan will not be able to achieve 100 percent organic status by 2020. The assessment showed that since the 100 percent target was set, the Bhutanese government has continuously lowered its support for organic to focus instead on ensuring food security. This is clearly visible in the progressive decrease in budgetary allocations for the organic program compared to the total budget for the MoA in the period 2014-2017.

One of the nation's primary objectives remains to increase field crop production and agriculture infrastructure, thereby enhancing cereal self-sufficiency and nutrition security. This objective might be perceived as conflicting with the 100 percent organic goal since its achievement has been ensured also through measures that involve facilitating access to synthetic fertilisers for farmers' communities via subsidies on transport, especially for cash crops like cereals and potatoes, while decreasing support to the organic programme. The focus on self-sufficiency arose as a result of Bhutanese dependence on cereal imports and the necessity to boost national production. The economic model developed by Feuerbacher et al. (2018), supports these concerns and concludes that a mere conversion from conventional farming to organic by default would likely lead to contraction in agricultural production due to the gap in yields.

The acknowledgement that the 2020 vision will not be achieved has triggered a positive, open, and honest discussion about the future of Bhutan's farming and food policy. The outcomes of the ICIMOD report were validated in a multi-stakeholder workshop in May 2017. A phased approach to support organic farming with prioritisation of activities to be implemented over 15 years was agreed.

Following this revision, the Bhutanese government appears to be lending renewed support to the organic mission. The 12th Five Year Plan (2018–23) has established a dedicated set of measures to develop organic farming under the Organic Flagship Program. The program has a budget allocation of 11.7 million euros, the highest financial support ever earmarked for organic in the country. According to the government "the program will target the organic production of eight selected export commodities and four for domestic consumption. Implemented by the NOP, this action aims to produce approximately 254'000 MT of bio-inputs within five years,

generate approximately 1'500 new jobs, and to engage around 33'000 farmers across the country" (Gross National Happiness Commission 2019). The plan aims to achieve approximately 13'500 hectares by 2023 and no longer mentions the 100 percent organic farming target.

Indian Himalayan Range[1]

The Indian Himalayan Region covers an area of approximately 54 million hectares. A cradle of water resources and rich in biodiversity, this part of India is home to important and fragile ecosystems and natural resources. The region has been only marginally impacted by the Green Revolution, and livestock is commonly integrated into the farming systems, making manure largely available. Based on these premises, the state of Sikkim chose to pursue a 100 percent organic mission. However, Sikkim is not the only Himalayan state looking at organic farming as a strategy for transforming the local agricultural systems. The adoption of organic farming is already a reality in most other Himalayan states, and political promotion of organic farming is ongoing with varying intensity across all states.

In India, agriculture falls under state jurisdiction, and state governments are primarily responsible for the sector's growth and development. At the central government level, institutional support for organic production began in 2001, when the Indian government began to promote organic farming as a niche sector by launching the **National Programme for Organic Production** (NPOP), which has the objective to support organic production for export through third-party certification. Today the central government proposes several important programs to support the development of organic farming and agroecology. In 2015, two key programs fully dedicated to supporting organic farming were launched:

- The **Paramparagat Krishi Vikas Yojna (PKVY)** is a component of the Soil Health Management under the National Mission on Sustainable Agriculture led by the Ministry of Agriculture. The program aims to support domestic organic market development through certification of small-scale producers via Participatory Guarantee Systems (PGS) with a subsidy scheme covering a variety of costs, such as input purchase, harvesting, transportation costs, and marketing. Himalayan states have to co-finance only an additional 10 percent out of the total budget received from the central state. The total amount allocated for the scheme in the period 2015-2018 was 118 million euros. All Himalayan states have implemented the program with varying level of intensity.
- The **Mission Organic Value Chain Development for the North East Region (MOVCDNER)** is a value chain-based organic farming scheme in the north eastern region under the Ministry of Development of the north eastern region. A

[1] The Indian states located across the Himalayan range can be divided between western and eastern states. Western Himalaya refers to the region including Jammu and Kashmir, Himachal Pradesh, and Uttarakhand. In the Eastern part are the north eastern states of Arunachal Pradesh, Manipur, Meghalaya, Mizoram, Nagaland, Sikkim, and Tripura as well as Assam Hills and West Bengal Hills.

total sum of approximately 50 million euros have been allocated to this scheme in its first phase (2015-2018). The mission aims to support the creation of producers' organisations, on-farm and off-farm organic inputs production, support for certification, post-harvest, processing, and marketing. The government reported that almost 50'000 farmers benefited from the program. A second phase is foreseen for the period 2018-2020, with a budget allocation of approximately 28 million euros. All Himalayan states have implemented the program with varying levels of intensity.

Thanks in part to this support the Indian organic market has been experiencing steady double-digit growth. Additionally, India houses the largest number of certified organic producers in the world (more than 1.1 million producers), and it is the country exporting the largest amount of organic cotton.

The Himalayan states are also playing a role in the development of the organic sector. Many of them developed policy frameworks specifically dedicated to supporting organic farming such as Jammu & Kashmir, Himachal Pradesh, Uttarakhand (draft), Sikkim and Arunachal Pradesh (see also Table 47).

- **Himachal Pradesh's** Organic Policy was developed in 2011. As framed in the policy, the state launched its specific research centres for organic agriculture. Since 2018, the Department of Agriculture has been promoting organic farming closely in line with Zero Natural Budget Farming (ZNBF)[1]. This overarching program includes the implementation of national organic programs like the Paramparagat Krishi Vikas Yojna (PKVY) and the creation of a state unit for ZNBF.
- In 2018, **Uttarakhand** allocated approximately 195 million euros for developing the organic sector over the following three years. Synergies have been created between the PKVY program supporting organic farming and the national program aiming to improve Ganga River water quality.
- In **Sikkim,** political commitment to support organic farming in Sikkim began in 2003, when former Chief Minister Pawan Chamling announced his vision for Sikkim to become India's first organic state. The vision was strengthened in 2010 with the design of the "Sikkim Organic Mission", a road map detailing all necessary measures to become a fully organic state by 2015, including the gradual phase-out of subsidies for synthetic inputs and their subsequent ban. This objective was achieved and in December 2015, the state declared itself the first organic state in the world with 75'000 hectares of certified organic land. Another important measure was the establishment, in 2016, of the National Organic Farming Research Institute in the state capital of Gangtok, which provides research and technological backstopping to organic production systems, not only for Sikkim but for all of the Indian northeast hill region.

[1] Agroecological farming approach that promotes growing crops in harmony with nature based on traditional practices

Table 47: Overview of cultivated area (ha) in the Indian Himalayan states under certified organic farming, including in-conversion, share at the state and national levels (2017)

State	Organic agricultural land in 2017 (ha)[1]	Total cultivated area (ha)[2]	Share of organic land (state level)	Share of organic land – country level
Jammu & Kashmir	22'870	733'000	3.12%	1.28%
Himachal Pradesh	14'153	551'000	2.57%	0.79%
Uttarakhand	42'304	788'000	5.37%	2.37%
Arunachal Pradesh	6'179	166'000	3.72%	0.35%
Manipur	5'397	140'000	3.86%	0.30%
Meghalaya	40'335	240'000	16.81%	2.26%
Mizoram	998	91'000	1.10%	0.06%
Nagaland	88'39	261'000	3.39%	0.49%
Sikkim	76'076	95'000	80.08%[3]	4.26%
Tripura	2'251	277'000	0.81%	0.13%
Assam	28'011	2'701'000[4]	1.04%	1.57%
West Bengal	5'811	5470'000[5]	0.11%	0.33%
Subtotal	253'224	11'513'000		14.17%
Total India	1'786'494	158'000'000		

Source: Compiled by IFOAM – Organics International based on various sources (See footnotes)

– The government of **Manipur** has not yet developed an organic policy. However, it has been supportive of organic agriculture, having formed a government agency specifically dedicated to promoting organic agriculture. This agency, known as Manipur Organic Mission Agency, aims to convert as much of the state's area into organic zones by 2025 and act as the implementing body of the MOVCDNER program.
– **Nagaland** is currently in the process of drafting an organic policy. In May 2019, the Additional Director of State Agriculture Department, Kevikhu Achumi, confirmed during a public event that the government would continue to work toward spreading organic farming across the state.

Nepal

The establishment of commercial organic farming in Nepal started in the early 1990s. Though certified organic farming accounts for a small segment of acreage, production,

[1] APEDA, 2017, http://apeda.gov.in/apedawebsite/organic/data.htm#certification_process_5
[2] Tej Partap, Hill Agriculture: Challenges and Opportunities* *Ind. Jn. of Agri.Econ. Vol.66, No.1, Jan.-March 2011.*
[3] De facto conventional agriculture is forbidden in the state of Sikkim because the use of synthetic inputs is banned by law. However, not all of the cultivated land is by third party organic-certified.
[4] Figures do not differentiate the organic cultivated area based on plain and mountainous geographical areas of the state.
[5] Figures do not differentiate the organic cultivated area based on plain and mountainous geographical areas of the state.

and number of producers (less than 1'000 in 2017), organic farming is not a new concept in the Nepalese context, where a very high percentage of agriculture farming is by default organic, and recently there has been growing interest from both the governmental and non-governmental sectors to advocate for its promotion.

In 2004, With the **National Agricultural Policy**, the government included for the first time the promotion of organic farming among its strategies to modernise the agriculture sector. In 2006, the Nepal Permaculture Group, together with other key stakeholders, the private sector, and civil society organisations, drafted the national organic standards for production and processing. Endorsed by the government, these standards continue to remain voluntary because Nepal's National Regulation on Organic Production has not yet been enacted. A decade later, the **Agriculture Development Strategy** (ADS) (2015–2035), was established to guide the Agriculture Sector of Nepal over 20 years. It recognises organic branding as a possible component in increasing the competitiveness of the Nepalese agricultural sector. The strategy includes promoting community-based seed production, supporting integrated systems such as agroecology, promoting extension services in organic farming, production of organic inputs and subsidies for purchasing fertilisers (organic and synthetic).

In November 2017, the current ruling party released its election manifesto, which includes the target to make Nepal a chemical and pesticide-free country within ten years. However, this statement has thus far not been supported by a concrete road map. Nevertheless, it seems that more concrete measures are developing. In April 2018, the Karnali Province government enacted a **Policy and Development Program** (2018- 2019) that outlines the area's gradual transformation into a fully organic province.

Additionally, in 2019, the Nepal government formed a 15-member High-Level Taskforce on Organic Promotion in Nepal to develop a proposal for a holistic program that guides the development of organic farming over the coming years. According to the national press, the document suggests several recommendations, which include establishing a separate Organic Development Board, conducting training on organic agriculture for farmers and awareness programs for consumers, and providing support dedicated to researcher and extension services. The document was submitted to the Ministry of Agriculture in July 2019.

Moving forward, but not without contradictions

By and large, institutional interventions in these three countries allow for better access to organic inputs, especially organic fertilisers, the creation of governmental units dedicated to organic farming, and support for specific research, training, and extension service programs. They also allow increased support to reach local and international markets, i.e. through subsidies for certification.

Although positive, policy interventions across the three countries remain not without contradictions and often struggle to break free from current unsustainable

development paradigms. Under the guise of food insecurity reduction, increased amounts of chemicals have been provided to farming communities in Nepal, India, and Bhutan, which is in contradiction with the vision of pursuing a full transition to organic and agroecological farming. Overall, governments worldwide continue to provide disproportional support to conventional agriculture in the name of achieving higher productivity and reducing food insecurity, as observed in all countries investigated. In all three countries, the use of synthetic fertilisers has been increasing thanks to public support to access those inputs. In India, for instance, this duality is clearly visible. Besides supporting organic farming, the country has one of the most heavy fertiliser subsidy programs worldwide. In the year 2017-2018 for instance, the Indian government allocated approximately 9 billion euros to subsidise fertiliser purchase. In comparison, the two dedicated programs for organic farming, PKVY and MOVCDENR, were supported over the period 2015-2018 with a total budget of approximately 168 million euros.

India also allows the cultivation of genetically modified (GM) crops and, as of now, only five different GM Bt cotton varieties were approved for commercialisation. India is the biggest organic cotton exporter worldwide; widespread GM contamination is a major factor for increased costs, loss of reputation, and market loss for the organic supply chain. Sikkim is not the only Indian state to have fully banned GM crops, as Maharashtra and Karnataka also enforced a ban on Bt cotton, in 2012 and 2015, respectively. Additionally, due to a legislative void on GM food, India is experiencing issues with GM contamination for food containing cottonseed oil.

It is therefore vital to promptly discontinue such detrimental policy measures. Institutional support to organic and agroecological farming has increased the visibility and importance of a wider range of mountain organic products and these countries are providing inspiration and impetus. However, to upscale the role of organic and agroecological farming in mountain development and worldwide, policy frameworks should go beyond the conventional „value-adding chain“ approach and pursue organic and agroecological farming as a holistic strategy to achieve the vast spectrum of targets foreseen by the Sustainable Development Goals (SDGs) and the 2030 Agenda.

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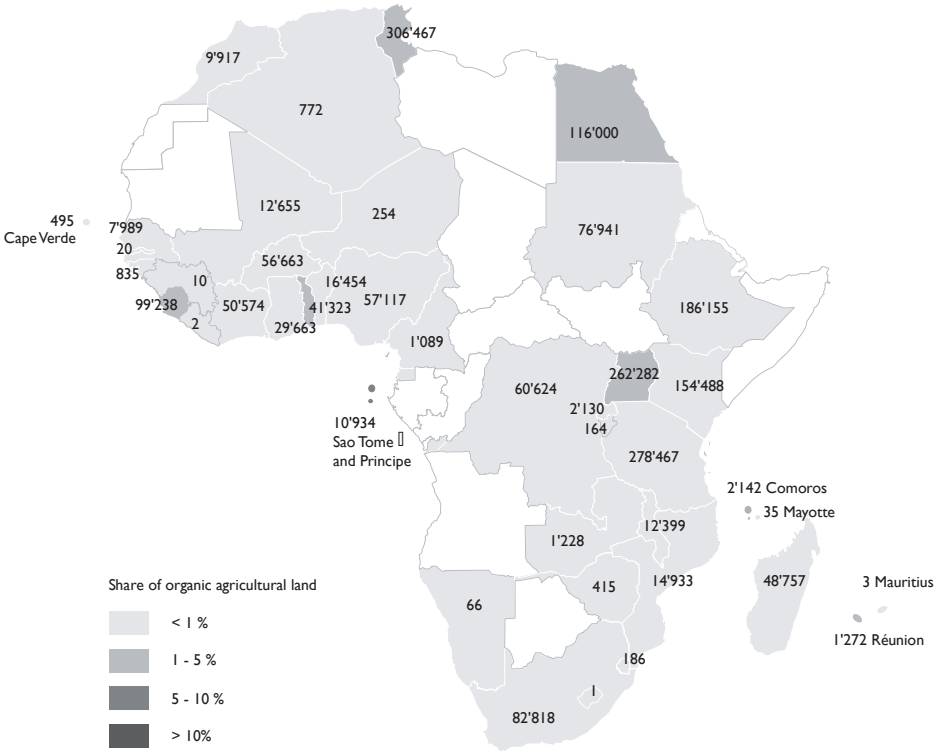

Map 2: Organic agricultural land in the countries of Africa 2018 (in hectares)

Source: FiBL survey 2020, based on information from the private sector, certifiers, governments, and for North Africa, the Mediterranean Organic Agricultural Network (MOAN)
For detailed data sources see annex, page 315

Latest Developments in Organic Agriculture in Africa

JORDAN GAMA[1] AND DAVID AMUDAVI[2]

Organic agriculture (known as ecological organic agriculture in Africa) has gained momentum and grown in recognition among farmers, practitioners, policymakers and other stakeholders for its significant role in addressing food insecurity, land degradation, poverty, and climate change among other benefits. Specifically, efforts have been made in mainstreaming organic agriculture into policy, national extension systems, marketing and value chain development, and curricula of some academic institutions and African-led research activities in the continent.

The Ecological Organic Agriculture Initiative (EOA-I)

The Ecological Organic Agriculture Initiative (EOA-I) had several achievements during the year 2019. Databases of the initiative have been established by partners to make research findings and knowledge on Ecological Organic Agriculture (EOA) available and accessible by various users[3]. An external process identified 18 organic practices to be scaled up, including conservation farming, practices for maintenance and enhancement of soil fertility, biopesticides, organic manure and water conservation practices.

There has been increased public awareness of EOA practices and products and their "multi-functional" benefits. Overall, two-thirds of those reached by the EOA Initiative in participating countries are already aware of EOA practices and technologies. Across the 18 practices identified, the proportion of producers implementing such practices increased in 2017 compared to 2013. Evaluation findings show evidence of impact on farmers' knowledge, attitudes and uptake of EOA practices and technologies leading to the uptake of a range of technologies and practices. Overall, it is reported that about 58 percent of the organic producers have realized a more than 10 percent increase in their incomes, while 73 percent have had their quality of life improved. However, there are obstacles to transition that need to be addressed, including farmers' fears of social exclusion, low economies of scale, lack of organized value chains, and lack of knowledge at all levels.

With the expectation of a substantially increased share of organic quality products in local, national and regional markets, achievements have varied in terms of improved access to markets and increased monetary income by participating households. Some countries have adopted very innovative approaches to reach farmers and connect

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[3] Fore more information see the EOA website http://eoai-africa.org/research

them to markets. This has consequently led to increased knowledge and practice of EOA, improved access to seed, improved food security, increased incomes, and advocacy platforms. Volumes of organic exports have increased in some countries. The EOA-I partners supported several trade fairs resulting in numerous market orders from European, Japan and China.

Multi-stakeholder platforms with varying membership compositions have been established in all eight participating EOA-I countries (Benin, Ethiopia, Kenya, Mali, Nigeria, Senegal, Tanzania and Uganda). Consequently, some countries have made good progress in advocating for policy change by introducing policy drafts. For example, Kenya has an organic agricultural policy draft, which is within the national structures of policymaking. In Uganda, in collaboration with the organic sector, the Ministry of Agriculture obtained the Certificate of Financial Implications from the Ministry of Finance and Economic Development, eventually leading to the approval of the organic policy in July 2019. Nigeria has its third draft policy on organic agriculture. The policy focuses on promoting, propagating, developing and implementing the practice of organic agriculture and seeks to prevent contamination of underground water, destruction of the environment, and depletion of natural resources, among others.

The EOA Initiative, supported by the Swiss Agency for Development and Cooperation (SDC), the Swedish Society for Nature Conservation (SSNC) and the African Union, included a range of beneficiaries, both men and women. In the evaluation of the first phase, 75 percent of the key informants reported an increase of 20 to 30 percent in the adoption of EOA practices and technologies as well as entry into new markets. Farmers, traders/processors and consumers are some of the key value chain actors in organic agriculture production, market and consumer systems. Farmer needs revolve around knowledge, skills and practices on EOA as well as access to organic inputs and markets. The processors are keen on having a consistent supply of quality organic products, accessing reliable markets of organic products and financial services, including insurance. Consumers would like to have access to healthy foods free from chemicals and thus, would consistently require information on sources and availability of information on a range of organic products/differentiation of products.

Another achievement was that the EOA-I platforms in Eastern, Western and Northern Africa were successfully held in the second half of 2019. The 1st International Conference on Agroecology Transforming Agriculture and Food Systems in Africa took place in June 2019. It was organized by Biovision Africa Trust, IFOAM – Organics International and World Food Preservation (LLC) and brought together over 400 national, regional, continental and international agroecology and agribusiness development stakeholders.

Institutional Developments

The African Union (AU)-led EOA-I Continental Steering Committee (EOA-I CSC), supported by its Secretariat, has provided strategic guidance on the implementation of EOA in Africa as informed by various efforts. The 11th EOA-I CSC meeting held in Zanzibar commissioned a study to assess the EOA-I governance structures and provide recommendations to revamp them that can effectively drive the implementation of the EOA-I agenda in Africa. The report has been produced, and actions for implementation are on course. The structures driving the mainstreaming of various elements of the initiative include the National Steering Committees (NSC) chaired by representatives of the Ministries of Agriculture or the related line ministries, Regional Steering Committees (RSC) chaired by representatives of Regional Economic Committees and the EOA-I CSC chaired by a representative of the African Union Commission (AUC).

The African Union also commissioned a study on the legal, policy and institutional development of EOA in Southern, Northern, Central and Western Africa, building on the East Africa study commissioned by Biovision Africa Trust on behalf of the EOA-I CSC. Results from the study, including the development of scorecards to show the status of EOA developments in African countries, were presented at the Ministerial Session of the 3rd Specialized Technical Committee on Agriculture, Rural Development, Water and Environment in October 2019. The ministers have recommended that the Heads of States endorse the EOA-I CSC Secretariat to be officially recognized as an official support agency of the African Union, implementing its decision on organic agriculture and that Biovision Africa Trust be recognized as its official host. Further, the Member States and Regional Economic Communities have been urged to fast track the establishment of regional and national committees to partner with others to implement the EOA Initiative. The ministers have also urged the AU and the Member States to mainstream EOA into national investment plans and the African Union Commission & EOA-I Secretariat to develop some high-level indicators to monitor the performance of EOA in the continent and have them included in the Comprehensive Africa Agriculture Development Programme (CAADP) biennial review process.

Growth in the coalition of international partners was realized during 2019. A key milestone for the EOA-I is the collaboration and partnership between the Initiative and the new Knowledge Centers for Organic Agriculture (KCOA) initiative supported by the German development agency. The initiative was officially launched during the Nuremberg Biofach event in February 2019. With the current trend of depletion of resources and climate change, Africa is likely to feel the consequences more strongly. This initiative, therefore, will contribute to improvements in entire food and agricultural systems using ecologically sustainable practices. Recognizing the value of the initiative, the African Union Commission has requested that BMZ (the German Federal Ministry of Economic Cooperation and Development) consider extending support for additional regional knowledge hubs to Central Africa. GIZ (the German Corporation for International Cooperation) and the EOA-I secretariat have also

requested that the AU consider hosting the KCOA continental digital platform. This request has been received with much enthusiasm by the Department of Rural Economy and Agriculture (DREA) of the African Union Commission.

To bring in more efficiency and effectiveness in the implementation of EOA projects in Africa, the EOA-I CSC – with the support of the Swiss Agency for Development and Cooperation (SDC) and its fund executing agency, Biovision Africa Trust – introduced a more effective granting system and monitoring and evaluation system and built a SharePoint-based extranet that would make the work of the EOA-I CSC more efficient.

Data on the status of organic agriculture

Data on organic agriculture in Africa is scanty and perhaps not precise. The EOA-I CSC, collaborating with IFOAM, has developed a survey tool to support the gathering of relevant data[1] on programmes and initiatives. The tool will be regularly used with other strategies, bringing Ministries of Agriculture and National Bureaus of Statistics on board to provide relevant data on organic agriculture and identify gaps and opportunities for further actions. This will be further facilitated by the development of some high-level indicators to monitor the performance of EOA in the continent and have them included in CAADP's biennial review reporting process. These efforts are aimed to improve the data that will be fed into the database of Eurostat, the Statistical Office of the European Union.

Achievements by the African Organic Network (AfrONet)

The year 2019 saw significant achievements in the institutionalization of the African Organic Network (AfrONet).[2] AfrONet is the umbrella body, established during the second African Organic Conference in 2012, in Lusaka, Zambia to unite and motivate non-state African ecological/organic stakeholders (Gama, 2018). AfrONet is an important body for the future of the African organic movements and organic sector development.

AfrONet aims to strengthen and support national, regional and continental networks, overseeing the development and growth of the EOA Initiative for Africa, and it is a member of the EOA's Continental Steering Committee (CEC) and Regional/Cluster Steering Committees.[3] AfrONet is positioning itself to network with all key networks

[1] https://www.surveymonkey.de/r/C7JQ537

[2] Information about AfrONet is available on www.afronet.bio

[3] The EOA initiative in Africa is a response to support and implement the African Union Council Decision on Organic Farming passed during the Eighteenth Ordinary Session, 24-28 January 2011, EX.CL/Dec.621 (XVIII). The overall goal of the initiative is to mainstream Ecological Organic Agriculture into national agricultural production systems by 2025 to improve agricultural productivity, food security, access to markets and sustainable development in Africa. This is to be realized through scaling up ecologically and organically sound strategies and practices through institutional capacity development, scientific innovations, market participation, public policies and programs, outreach and communication, efficient coordination, networking and partnerships in Africa.

in the African continent. Specifically, in Southern Africa, AfrONet is reaching out to the Southern African Network for Organic Development (SANOD) and IFOAM's Southern African Network (ISAN), which have been uniting stakeholders and further developing organic agriculture in the region. Other active regional networks relevant to AfrONet are from Western, Central, and Eastern Africa. AfrONet has been bringing together all the networks, partners and other stakeholders under the platform of the African Organic Conference (AOC). Following the 4th AOC in Saly, Senegal, 2018, Morocco will host the 5th AOC in Marrakesh in 2021. This conference will be the first AOC to be held in a north African Member State.

Stemming from the desire to have a platform akin to the Partnership Platform of the Comprehensive Africa Agriculture Development Programme (CAADP), the EOA-I CSC Meeting held in Accra, Ghana in November 2019 recommended a review of the governance of the EOA Initiative and that it be led by a strong Multi-stakeholder Platform (MSP). This will help galvanize efforts and improve coordination between institutions and different levels of government, fast-track access to empirical evidence for policymakers and technocrats, and support fundraising for the initiative. The MSP arrangement will bring together representatives from different interest groups to discuss and share challenges, opportunities, policy actions and advocacy strategies and to tap into the potential by different partners to address complex challenges facing the development and scale-up of the EOA Initiative.

AfrONet's regional affiliates achieved various milestones in 2019. The 5th West African Organic Conference (WAOC) with the theme "Organic Agriculture: Life for All" by the West African Organic Network was held in Ghana from 12th to 15th November, with over 350 participants from about 30 countries. The forum resolved that all Member States within the Economic Community of West African States region and beyond should strive to develop a vibrant organic and ecological agriculture sector that contributes much to improve life for all – including ecosystems, biodiversity, lives and businesses – and leave a flourishing legacy for future generations. Establishment of an annual BioWest Africa Fair was approved, as well as harmonization of PGS organic standards in the region. Burkina Faso will host the 6th WAOC in 2021.

The National Institute for Agricultural Research (INRA) Morocco, the International Society of Organic Agriculture Research (ISOFAR), AfrONet and other institutions co-organised the 1st EU/North-African conference on organic agriculture (EU-NACOA) in Marrakesh, Morocco from 11-12 November with the theme "Bridging the gap, empowering organic Africa", which brought together 140 participants. The conference had 33 oral presentations and 62 posters from a total of 24 countries representing Africa, Europe, Asia and North America (Azim et al. 2019). The status of organic production in North Africa and Morocco was presented. In this region, the umbrella organization FIMABIO (the Organic Federation of Morocco) is an important actor, coordinating producers, processors and distributors of organic products. The scientific track had presentations on research activities and results, which aimed to solve

problems and challenges related to organic production. Information was also given about regulations, for example, the organic regulation in the USA as well as changes to the recently revised EU regulation that are of relevance for countries exporting to the EU. Contributions from young Masters and PhD students were presented, sharing their results in posters and presentations, and actively taking part in the discussion. Their excellent results and presentations give hope for the fruitful development of organic agriculture in Morocco and beyond (Loes 2019). Tunisia will host the second edition of the EU-NACOA in 2022. To underscore the focus on organic agriculture, INRA Morocco plans to have a four-year research program on Organic and Ecological Agriculture (2021-2024), which will be funded by the Moroccan government along with FIMABIO.

The Network of Organic Agriculture Researchers in Africa (NOARA)

NOARA, the Network of Organic Agriculture Researchers in Africa, is a network established by African organic agriculture researchers that met for the first time in Modena, Italy, in 2008. It was launched in 2009, during the 1st African Organic Conference (AOC) in Kampala, Uganda and was revamped during the 2nd AOC held in Lusaka, Zambia, in May 2012. To enhance hosting of NOARA and better management of its activities, the General Assembly of the 4th AOC in 2018 at Saly, Senegal, recommended that AfrONet host NOARA and re-organize the network for effective and efficient execution of its roles. NOARA is now officially registered and hosted in Nigeria with a Board of Trustees in place. The vision of NOARA is Africa with zero hunger, poverty eradicated, improved livelihoods and a sustained ecosystem through innovative organic and ecological agriculture research (for more information visit www.noara.bio).

The roles of NOARA include: spearheading organic agriculture research, extension, training and value chains and market development; undertaking lobbying and advocacy on organic and ecological agriculture research at high levels; supporting capacity building for key players in organic and ecological agriculture across the continent; mobilizing resources for NOARA's endeavours in promoting organic agriculture on the continent; providing management and administrative consultancy to like-minded programmes and partners on organic agriculture research; and undertaking any other functions as deemed necessary to address NOARA's objectives.

In 2019, NOARA rigorously stepped up its activities with the registration of over 200 members from 16 countries, cutting across all regions of Africa and three non-African countries that contributed to various organic agriculture conferences that took place in Africa. The network launched its maiden edition of the African Journal of Organic Agriculture and Ecology (AJOAE) during the 5th West Africa Organic Conference held in Ghana and is currently leading the process of developing a demand-driven Organic Agriculture Research Agenda for Africa 2030 with a multi-stakeholder approach, expected to be completed by June 2020.

Outlook

Organic production growth projections in Africa show 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 based on low external inputs provides an excellent foundation upon which organic agriculture can enhance productivity, resilience, and the profitability of smallholder farming in Africa. With this base and investments allocated to research and development of ecologically sustainable systems, going organic portends an ideal development option for Africa. Organic farming practices integrate traditional farming methods and the use of affordable, locally available resources. As such, they are highly relevant to the 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. A better future for the organic sector requires African governments and their relevant institutions, farmers and farmer organizations, development partners and the private sector to invest resources in relevant research, policy and programmes and establish platforms for experience sharing, learning and collaboration and thereby build the basis for sustainable, long-term food and nutrition security and poverty reduction.

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Africa: Current Statistics

JAN TRÁVNÍČEK[1], BERNHARD SCHLATTER[2], JULIA LERNOUD[3] AND HELGA WILLER[4]

There were almost 2.0 million hectares of agricultural land in 2018, which is 0.2 percent of the continent's total agricultural area and 2.8 percent of the global organic agricultural area. The organic agricultural land in Africa has increased by 4'130 hectares or 0.2 percent compared to 2017, and it increased by almost 2 million hectares from the 53'000 hectares in 2000. In 2018, 47 countries reported data on organic activities. Tunisia is the country with the largest organic area, with almost 306'500 hectares, and Uganda is the country with the highest number of organic producers, with over 210'000. The country with the highest organic share of the total agricultural land is the island state of Sao Tome and Principe, with 22.5 percent of its agricultural area being organic, followed by Egypt with 3.1 percent, and Tunisia with 3 percent.

Land use

In 2018, almost two-thirds of all organic agricultural land was used for permanent crops (almost 1.3 million hectares) in Africa. Almost 30 percent was used for arable crops (over 550'000 hectares), and only 0.2 percent (over 4'000 hectares) was grassland/grazing area. For 10 percent of the organic agricultural land, no details were available.

Tunisia (306'000 hectares, mainly olives), Tanzania (over 278'000 hectares, mainly coffee Uganda (over 262'000 hectares, mainly nuts and coffee), Ethiopia (186'000 hectares mainly coffee), Kenya (over 154'000 hectares, mainly nuts and coconuts), and Egypt (116'000, mainly medicinal plants), had the largest organic permanent crop areas. The key organic permanent crop is coffee, with over 360'000 hectares reported, 12.6 percent of the total coffee area of the region. The largest organic coffee areas are in Ethiopia (over 161'000 hectares) and Tanzania (almost 82'000 hectares). The organic coffee area has increased almost 20-fold since 2004; some of the increase can be attributed to the continually improving data availability. Cocoa was grown on almost 171'500 hectares, and it has grown more than 70-fold since 2004, representing 2.1 percent of the continent's cocoa area. The largest areas of organic cocoa are found in Sierra Leone (61'500 hectares), Democratic Republic of Congo (51'900 hectares), and Uganda (over 19'000 hectares).

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

Almost thirty percent of the organic farmland was used for arable crops, most of which are oilseeds (almost 194'000 hectares, 0.7 percent of the total oilseed area; mainly sesame), textile crops (104'000 hectares, 2.2 percent of the region's total cotton area), and cereals. More than 65 percent of the region's cotton is found in the United Republic of Tanzania (almost 68'500 hectares), followed by Uganda (13'100 hectares). Since 2004, the organic cotton area grew almost 11-fold. Cereals were grown on over 65'000 hectares in 2018; the key producing countries were the United Republic of Tanzania (almost 51'000 hectares), Egypt (almost 9'000 hectares), and Senegal (almost 3'700 hectares).

Producers

There were at least 788'858 organic producers in Africa. The countries with the most organic producers are Uganda (over 210'000), Ethiopia (over 203'000), and the United Republic of Tanzania (over 148'000). It can be assumed that the number of producers is higher because some countries only report the number of farm enterprises/companies.

Wild collection

Wild collection has an important role in Africa with over 11.5 million hectares certified as organic in 2018. Zambia is the country with the largest area (more than 3.2 million hectares, mainly beekeeping), followed by the United Republic of Tanzania (2.4 million hectares, mainly beekeeping), South Africa (1.5 million hectares, mainly devil's claw), Namibia (1.1 million hectares, mainly devil's claw), Somalia (over 826'000 hectares, mainly natural gums), and Mozambique (more than 813'000 hectares, mainly coconuts). Medicinal plants, such as devil's claw (*Harpagophytum procumbens*) are the commodities that have the largest area (over 2.7 million hectares), followed by nuts (over 700'000 hectares), such as mongongo nuts. Beekeeping is the key activity in organic wild collection in Africa with more than 5.0 million hectares. Zambia is the country with the largest wild collection area used for organic beekeeping with more than 2.5 million hectares, representing 49 percent of the total beekeeping area.

For more information about the African figures, see data tables for Africa, page 198.

Organic Agriculture in Africa: Graphs

Africa: The ten countries with the largest organic area 2018
Source: FiBL survey 2020

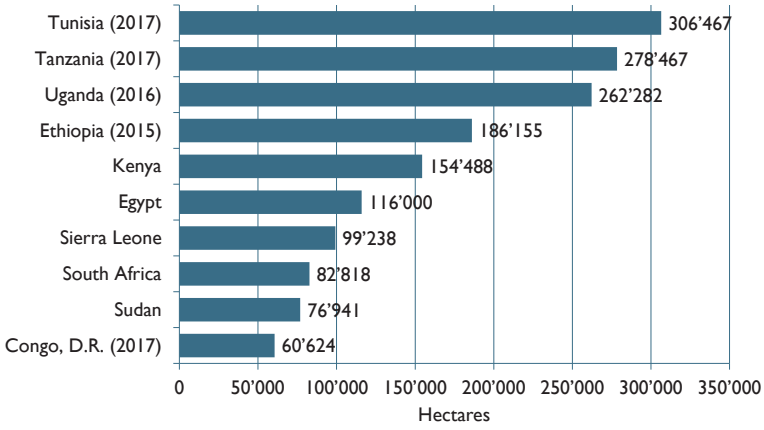

Figure 60: Africa: The ten countries with the largest organic agricultural area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Africa: The countries with the highest organic share of total agricultural land 2018
Source: FiBL survey 2020

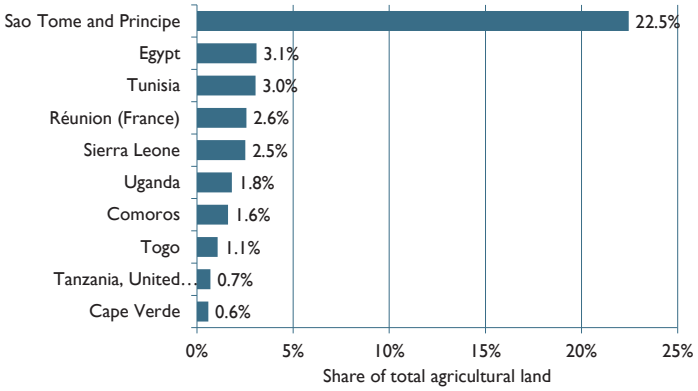

Figure 61: Africa: The countries with the highest organic share of total agricultural land 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Africa: Development of organic agricultural land 1999-2018
Source: FiBL-IFOAM-SOEL-Surveys 2001-2020

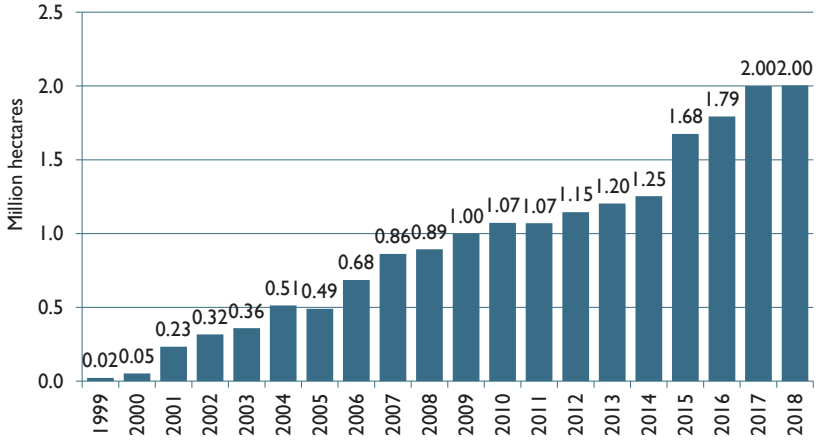

Figure 62: Africa: Development of organic agricultural land 1999-2018

Source: FiBL-IFOAM-SOEL-surveys 2001-2020

Africa: Use of organic agricultural land 2018
Source: FiBL survey 2020; based on information from the private sector, certifiers, and governments.

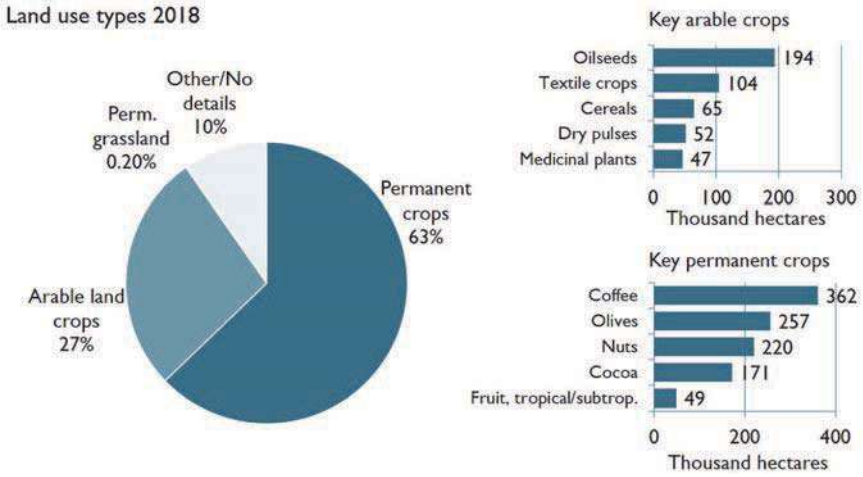

Figure 63: Africa: Use of organic agricultural land 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Africa: The ten countries with the most organic producers 2018
Source: FiBL survey 2020

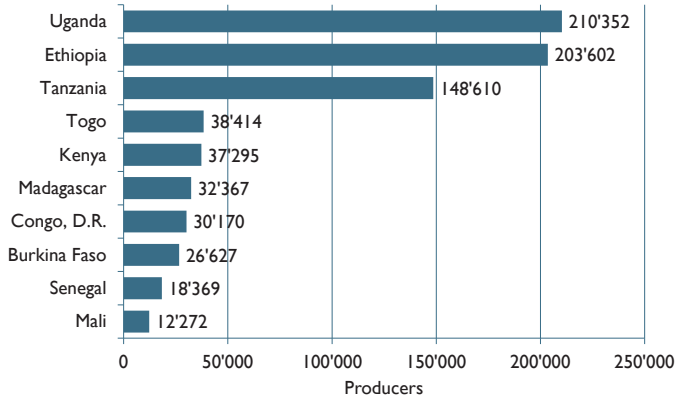

Figure 64: Africa: The ten countries with the largest number of organic producers 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Organic Agriculture in Africa: Tables

Table 48: Africa: Organic agricultural land, organic share of total agricultural land and number of organic producers 2018

For information on data year, see page 310.

Country	Area [ha]	Share of total agr. land [%]	Producers [no.]
Algeria	772	0.002%	64
Benin	16'454	0.4%	4'030
Burkina Faso	56'663	0.5%	26'627
Burundi	164	0.01%	16
Cameroon	1'089	0.01%	499
Cape Verde	495	0.6%	1
Comoros	2'142	1.6%	680
Côte d'Ivoire	50'574	0.2%	2'776
Congo, D.R.	60'624	0.2%	30'170
Egypt	116'000	3.1%	970
Eswatini	186	0.02%	2
Ethiopia	186'155	0.5%	203'602
Gambia	20	0.003%	1
Ghana	29'663	0.2%	3'228
Guinea	10	0.0001%	1
Guinea-Bissau	835	0.1%	1
Kenya	154'488	0.6%	37'295
Lesotho	1	0.00004%	3
Liberia	2	0.0001%	
Madagascar	48'757	0.1%	32'367
Malawi	12'399	0.2%	295
Mali	12'655	0.03%	12'272
Mauritius	3	0.003%	22
Mayotte	35	0.3%	3
Morocco	9'917	0.03%	277
Mozambique	14'933	0.03%	269
Namibia	66	0.0002%	8
Niger	254	0.001%	2
Nigeria	57'117	0.1%	1'091
Réunion (France)	1'272	2.6%	306
Rwanda	2'130	0.1%	3'870
Sao Tome and Principe	10'934	22.5%	3'564
Senegal	7'989	0.1%	18'369
Sierra Leone	99'238	2.5%	304
South Africa	82'818	0.1%	237
Sudan	76'941	0.1%	3
Tanzania	278'467	0.7%	148'610
Togo	41'323	1.1%	38'414
Tunisia	306'467	3.0%	7'456
Uganda	262'282	1.8%	210'352
Zambia	1'228	0.01%	286
Zimbabwe	415	0.003%	511
Total*	**2'003'976**	**0.2%**	**788'858**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 316
**Total number includes data for countries with less than three operators.*

Table 49: Africa: All organic areas 2018

Country	Agri-culture [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agri. land [ha]	Wild collection [ha]	Total [ha]
Algeria	772				628	1'400
Benin	16'454				3'700	20'154
Botswana					102'502	102'502
Burkina Faso	56'663				231'765	288'428
Burundi	164					164
Cameroon	1'089				47'000	48'089
Cape Verde	495					495
Chad					124'130	124'130
Comoros	2'142					2'142
Côte d'Ivoire	50'574				1'522	52'096
Congo, D.R.	60'624					60'624
Egypt	116'000				60'000	176'000
Eswatini	186					186
Ethiopia	186'155				9'033	195'188
Gambia	20					20
Ghana	29'663				108'981	138'644
Guinea	10				1'000	1'010
Guinea-Bissau	835					835
Kenya	154'488				121'625	276'113
Lesotho	1				6'363	6'364
Liberia	2					2
Madagascar	48'757				7'649	56'407
Malawi	12'399					12'399
Mali	12'655				8'690	21'344
Mauritania					2'800	2'800
Mauritius	3					3
Mayotte	35					35
Morocco	9'917				268'129	278'046
Mozambique	14'933				813'000	827'933
Namibia	66				1'123'603	1'123'669
Niger	254					254
Nigeria	57'117	3'600			1'000	61'717
Réunion (France)	1'272					1'272
Rwanda	2'130					2'130
Sao Tome and Principe	10'934					10'934
Senegal	7'989				34'413	42'402
Sierra Leone	99'238					99'238
Somalia					826'400	826'400
South Africa	82'818				1'538'832	1'621'756
Sudan	76'941		451		2'393	79'785
Tanzania	278'467				2'418'740	2'697'207
Togo	41'323					41'323
Tunisia	306'467		71'533	27'605	25'486	431'091
Uganda	262'282				158'328	420'610
Zambia	1'228				3'200'000	3'201'228
Zimbabwe	415				282'014	282'429
Total	**2'003'976**	**3'600**	**71'984**	**27'605**	**11'529'725**	**13'636'998**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Table 50: Africa: Land use in organic agriculture 2018

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		**169'179**
Arable crops	Cereals	65'050
	Dry pulses	51'558
	Fallow land, crop rotation	11'309
	Flowers and ornamental plants	937
	Fresh vegetables and melons	39'827
	Industrial crops	92
	Medicinal and aromatic plants	46'628
	Oilseeds	193'684
	Plants harvested green	6'203
	Root crops	19'253
	Seeds and seedlings	2
	Strawberries	679
	Sugarcane	9'773
	Textile crops	104'373
	Arable crops, other	967
Arable land crops total		**550'334**
Cropland, no details		**20'462**
Other agricultural land		**1'322**
Permanent crops	Berries	34
	Citrus fruit	7'539
	Cocoa	171'363
	Coconut	24'531
	Coffee	361'640
	Fruit	8'722
	Fruit, temperate	3'849
	Fruit, tropical and subtropical	49'155
	Grapes	6'388
	Medicinal and aromatic plants	40'953
	Nurseries	2
	Nuts	220'046
	Olives	256'809
	Tea/mate, etc.	6'285
	Permanent crops, other	101'333
Permanent crops total		**1'258'648**
Permanent grassland		**4'031**
Total		**2'003'976**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Table 51: Africa: Use of wild collection areas 2018

Land use	Area [ha]
Medicinal and aromatic plants, wild	2'769'518
Apiculture	2'573'441
Forest honey	2'500'000
Nuts, wild	958'969
Fruit, wild	301'369
Oil plants, wild	31'692
Rose hips, wild	21'788
Wild collection, no details	2'372'948
Total	**11'529'725**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 316

Asia

Map 3: Organic agricultural land in the countries of Asia 2018

Source: FiBL survey 2020 based on information from the private sector, certifiers, governments, and, the Mediterranean Organic Agricultural Network (MOAN) for the Mediterranean countries
For detailed data sources see annex, page 315.

Developments in the Organic Sector in Asia in 2019[1]

SHAIKH TANVEER HOSSAIN[2] AND JENNIFER CHANG[3]

Major developments in the organic sector in Asia in 2019

The area of organic agricultural land in Asia is about 6.5 million hectares or 0.4 percent of the total agricultural sector of the region. There is a growing interest in organic production in Asia. Assuring consumers of the genuineness and safety of organic products is critical for thriving commercial organic agriculture and agribusiness, particularly in the context of Asian consumers. Asian farmers are becoming more concerned about the origin and trustworthiness of organic products. They like to know how the products are grown and how quality is maintained throughout the supply chain. Trusted food traceability systems are needed to track and monitor food products along the entire value chain, including the integrity of farm inputs, food production at the farm level, and harvest and postharvest handling such as processing, transporting, warehousing, marketing, etc.

Blockchain and Internet of Things (IoT) technologies, which involve all parties in a smart agriculture ecosystem, can help in the development of a trusted, self-organised, open, ecological food traceability system. The adoption of digital technology in organic farming is not only making the organic sector a more profitable enterprise but will also encourage youth to practice agriculture. Further, these new technologies will address the issues of ageing and agricultural successors in countries like Japan, South Korea and Taiwan. Some countries, such as Vietnam, took initiative by incentivising entrepreneurs to import digital equipment in order to promote smart digital organic agriculture.

Significant achievements were observed in some Asian countries in 2019, such as the launch of the third version of the national organic standard in China. Similarly, the National Organic Agriculture Board of the Philippines approved the resolution for the inclusion of Participatory Guarantee Systems (PGS) in the national organic standards after consultation with various stakeholders. In South Korea, a pilot program started to provide environment-friendly rice to military bases, and the central government approved the budget to provide a box scheme of environmentally-friendly food to pregnant women.

The demand for organic food in Asia continues to grow fast, and it is uncertain whether the supply of local organic produce can keep up with the ever-increasing demand.

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[1] For more information about Bhutan, India and Nepal see policy hapter by Varini in this volume, page 178.

[2] Dr. Shaikh Tanveer Hossain, Agriculture Department, Asian Productivity Organization, Japan

[3] Jennifer Chang, IFOAM Asia, Seoul, Republic of Korea, https://asia.ifoam.bio/

Bangladesh

The growth of the organic sector is gradually increasing in Bangladesh after the adoption of the National Organic Agriculture Policy (NOAP) in 2016. Although organic farming is expanding, the organic farmland area and the number of organic producers remains small. The total certified area under organic production, including aquaculture, is only about 6'000 hectares, which is less than 0.1 percent of the country's total farmland. Aquaculture (shrimp) accounts for a significant share (5781 hectares) of the certified area while the rest (503.9 hectares) is covered by organic tea. Organic tea is mostly exported to the USA, Japan, UK, and Germany and organic shrimp to the European market.

Apart from certified organic products, different entrepreneurs and progressive farmers are also involved in producing various non-certified organic products such as fruits, vegetables, rice, wheat, cashew nut, and soybeans to meet the domestic market requirements. Some NGOs are trying to adopt the PGS for their product certification in the domestic market. Farmers, retailers, and consumers are becoming more concerned and the demand for more organic produce. However, trustworthiness is the biggest issue from the consumers' point of view. Thus, traceability systems will play a significant role in the domestic organic market.

Cambodia

Cambodia has been a focus for interventions by international development agencies since the early 1990s after thirty years of civil war. Policy development has become reliant on aid programs, which applies to the organic agriculture sector as well. With no equivalent word for "organic" in the local language, it was translated as "natural" and understood as farming without chemical inputs.

The Cambodian Organic Agriculture Association (COrAA), the only local organic certification body, was established through an international development initiative in 2006 and is still struggling to make the organisation "localised" and self-sustaining.

There are forty NOP-certified[1] operators, 14 of which are in organic rice production and 12 are in organic pepper production. All production was through contract farming. The number of buyers involved in contract farming through agriculture cooperatives for organic rice has increased while contract farming of organic cashew nuts has also been launched.

The Cambodian government is under pressure to be part of the efforts to harmonise the organic standards among ASEAN countries.[2] With the support of European donors, the Ministry of Agriculture Forestry and Fisheries has organised a

[1] The National Organic Program (NOP) is the federal regulatory framework in the United States of America governing organic food.

[2] The ASEAN standard for organic agriculture is available on the ASEAN website, https://tinyurl.com/qor3crn

consultation workshop to prepare the "Technical Guideline for a National Organic Standard".

China

Market: Under the "Belt and Road Initiative"[1], the import of organic products is growing rapidly, with an increase in foreign certification under the China organic standards. More and more organic products are sold in high-end Supermarkets and through online platforms. However, some problems have been detected with online sales as farmers claimed to be "organic" to profit from the premium price for certified organic products.

Policy: The third version of the national organic standard was revised and was enforced from 1st January 2019. Group certification is now required to be inspected annually, which will be helpful for smallholders to access the domestic market. The increasing number of policies focusing on ecological development has led to the central and local governments taking more interest in promoting organic farming. More and more central government agencies are visiting the head office of IFOAM - Organics International in Bonn to discuss options for future partnerships in organic agriculture.

Anniversary of the organic movement: The 30th anniversary of China's organic movement was celebrated by the Chinese organic stakeholders in November 2019 with the attendance of high-level IFOAM personnel. Big organic brands are joining IFOAM as members, which shows increasing consumer awareness and demand for organic and healthy food in China. The IFOAM Asia Country Office in China was officially launched to enable better networking in China.

India

The effects of climate change have again impacted agriculture in the country, ringing alarm bells for the country to react and change. Following years of drought or scarce rainfall, the average rainfall during just the month of September 2019 was 48 percent above normal. Overall, the country recorded the highest rainfall in 25 years during the monsoon period.[2]

Crops were devastated by the excessive rain in many parts of the country. Organic production was also affected as a result – however, there are various instances in the country, where organic farms with fertile soils and rich biodiversity have stood the test of such effects of climate change.

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[1] The Belt and Road Initiative (BRI) is a global development strategy adopted by the Chinese government in 2013. More information can be found on Wikipedia at https://en.wikipedia.org/wiki/Belt_and_Road_Initiative.

[2] The Times of India, September 30, 2019: September rainfall in India on course to be highest in 102 years. Available at https://timesofindia.indiatimes.com/india/september-rainfall-in-india-on-course-to-be-highest-in-102-years/articleshow/71366624.cms

With lessons learned from the changing climate and the effects of chemicals on the ecosystem, the Government of India has begun to promote various initiatives that provide incentives for organic farmers. These include dedicated schemes such as Parampragat Krishi Vikas Yojana (PKVY) and Mission Organic Value Chain Development for the North Eastern Region (MOVCDNER) among other schemes that pertain to the agriculture sector in general.[1]

The year has witnessed an increase in area under organic cultivation and increased demand for organic products within the country. The organic market trends in India indicate a current growth rate of 25 percent, and it is estimated to grow at this rate until 2022, according to ASSOCHAM (Associated Chambers of Commerce and Industry). There is still a large scope for organic certification and India is expected to become one of the top producers and consumers of organic foods in the world. [2,3]

Indonesia

In 2019, no new policy or regulation on organic agriculture was released by the government. The government program "1000 Organic Villages" has shown significant results where many farmer groups have joined the program and have been certified organic for trading on both domestic and international markets.

The organic industry also continues to grow, especially to fulfil international market demand. The biggest growth was in organic essential oils both for food and cosmetic ingredients. Organic coconut also shows increasing growth in the form of oil, milk, desiccated coconut and water.

Research on organic agriculture is led by the farmers' movement, and there is also a growing interest in environmental issues. Research on organic cultivation still focuses on soil fertility and plant protection of certain crops only. Many potential crops have not yet attracted the interest of organic researchers.

Japan[4]

The Ministry of Agriculture, Forestry and Fisheries in Japan (MAFF) revised the Japanese Agricultural Standard (JAS) and implemented the "Organic Food Identification Standards for Restaurants" in January 2019. A MAFF survey shows the

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[1] For more information about Bhutan, India and Nepal see policy hapter by Varini in this volume, page 178.
[2] The total farm area currently under third-party organic certification and PGS-India certification in the country is 2.7 million hectares including 0.6 million hectares under the PKVY scheme; 640'000 hectares under MOVCDNER scheme (both PGS), and 170'000 hectares under other initiatives. An additional 10'000 hectares are certified by civil society-led PGS initiatives. Under the National Program for Organic Production (NPOP) of APEDA 1.9 million hectares are certified.
[3] The Hindu Business Line: Organic market may touch 12,000 cr by 2020: March 21, 2018. Available at https://www.thehindubusinessline.com/economy/agri-business/organic-market-may-touch-12000-crore-by-2020/article23314105.ece#
[4] More information about organic agriculture in Japan can be found on the website of the Ministry of Agriculture and Fisheries at https://www.maff.go.jp/e/policies/env/sustainagri/organicagri.html

Japanese Organic Market is estimated at 185 billion yen[1] as compared to 130 million yen in 2009, showing rapid growth of the organic market.

The export of organic green teas is increasing, and the share of certified organic tea farms accounts for 6.3 percent of the total tea farms, which is a considerably higher share than that of other organic crops in Japan.

The total certified organic farmland is 10'792 hectares comprising 0.24 percent of all farmland in Japan.[2] Currently, 0.5 percent of all farmers in Japan practice organic farming, though only 0.2 percent are certified organic. Of the conventional farmers, 55 percent are willing to convert to organic farming, showing there is room for organic farming to grow. Support for farming techniques, knowledge sharing, building market and creation of retail logistics are needed for the organic sector.

MAFF is now supporting local governments promoting organic agriculture through the establishment of a platform of local governments. In August 2019, seventeen local governments became part of this initiative.

South Korea

In 2019, the South Korean organic market is estimated at approximately 350 million euros (450 billion Korean won), while the market for pesticide-free food is estimated at approximately 1 billion euros. Approximately 39 percent of the market share of environmentally-friendly food (organic and pesticide-free food combined) was taken up by school meal programs, 29.4 percent by large food outlets and 19.2 percent by speciality shops and consumer cooperatives.

According to the newly-amended Environmentally-Friendly Promotion Act, the definition of environmentally-friendly agriculture is "an industry increasing biodiversity, enhancing biological circulation and processes of the soil and producing agricultural products in a healthy environment to preserve farming ecosystems", moving away from the food safety-centred approach. It is hoped that this approach will help consumers broaden their view on organic agriculture. In June 2019, a one-month pilot program contributed 5000 tons of environmentally-friendly rice to military bases, and it is expected that this volume will increase in 2020. In 2020, another pilot program will provide pregnant women with environmentally-friendly food.[3]

Philippines

The growth of organic agriculture in the Philippines in the last few years was reinforced by the continuous growth of the League of Organic Agriculture Municipalities and Cities in the Philippines (LOAMCP-PH). In 2019, they partnered

[1] One euro corresponded to 130.40 yen in 2018, according to the Central European Bank (see http://sdw.ecb.europa.eu/browse.do?node=9691296)
[2] As of April 1st, 2018.
[3] Fifty percent of the funds for the box scheme food package will be provided by the central government and 30 percent from the local governments.

with the Department of the Interior and Local Government (DILG)[1], which mandated all Local Chief Executives (LCEs) or municipal and city mayors to become members of LOAMCP-PH.

In an effort to mainstream organic agriculture, the Negros Island Region (part of the Visayas region) has been hosting the Organic Farmers Festival for the last 14 years with support from the local government. Its vision is to reach 100'000 hectares in conversion and certified organic farms on the island. Currently, there are 20'000 hectares with organic production, including 5000 hectares of bananas, pineapples, the cereal adlai *(Coix lacryma-jobi)*, moringa, coffee, cacao, rice and other crops.

In November 2019, the National Organic Agriculture Board, in consultation with various stakeholders, approved the resolution for the inclusion of Participatory Guarantee Systems into the national organic standards. This will pave the way for thousands of farmers to label their products as organic.

Another major resolution was the creation of the Undersecretary for Organic Agriculture to facilitate the tracking of organic agriculture in the Philippines. These major resolutions will have significant effects on the continuous growth of organic agriculture in the Philippines.

Thailand

Thai organic agriculture continues to see a rapid expansion of organic rice farming after the launch of the subsidy scheme by the Ministry of Agriculture and Cooperative since 2017. However, without a comprehensive follow-up plan, the progress is unlikely to continue when the project ends in 2020.

With the unfavorable exchange rate, Thai organic exports suffer from slow growth, if not stagnant. Domestic markets, however, are expanding fast with the acceptance of PGS organic. The recent efforts by some local public hospitals to procure organic foods for its patients also help local organic expansion.

IFOAM Asia in 2019

The operations of IFOAM Asia were expanded to China and the Philippines with the opening of country offices.

Global interest in the Asian Local Governments for Organic Agriculture (ALGOA)[2] grew with the hosting of the International Organic Agriculture Policy Summit "ALGOA+4", which brought together policy experts and implementers from all continents. Membership grew rapidly in close partnership with the local governments in the Philippines and South Korea. International partnerships are under discussion, especially with similar groups in Europe.

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[1] The central government agency, which supervises all local chief executives.

[2] Asian Local Governments for Organic Agriculture (ALGOA) is a sub-organization under IFOAM Asia and is legally registered in South Korea. The current membership stands at over 260 with representation of local governments from 18 countries in Asia and Central Asia.

ALGOA focusses on capacity and policy development, research and documentation, public procurement and good governance. It will be set up in strategic countries in Asia under the full support of the respective governments and ALGOA/IFOAM Asia members and partners.

The Asia Organic Youth Forum will be expanded into a "World Organic Youth Forum" in June 2020 with the full support of the government of Goesan County, South Korea, while "Women in Organic Agriculture in Asia (WOAA)" is expected to be launched in early 2020 to represent the voices of the women stakeholders in organic agriculture.

Furthermore, the Asia Organic Innovation Committee sponsored by Xichong County, China, was launched in December 2019 to carry out research and document best practices in innovations in Asia.

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Asia: Current statistics

JAN TRÁVNÍČEK[1], BERNHARD SCHLATTER[2], JULIA LERNOUD[3] AND HELGA WILLER[4]

Overview

The area of organic agricultural land in Asia is more than 6.5 million hectares, which is 0.4 percent of the total agricultural area in the region. Nine percent of the global organic agricultural land is in Asia. Since 2001 (420'000 hectares), the organic land has grown over fifteen-fold. Between 2017 and 2018, the organic area in Asia increased by over 0.5 million hectares or 9 percent. The country with the largest organic agricultural area is China (3.1 million hectares), and the country with the most producers is India (1'149'371 producers). The countries with the highest organic shares of the total agricultural land are Timor-Leste (16.8 percent) and Sri Lanka (2.8 percent).

Land use

In Asia, 53 percent of all organic farmland was used for arable crops (3.4 million hectares) in 2018, 10 percent (nearly 667'000 hectares) for permanent crops, and 0.4 percent for grassland/grazing areas (over 27´000 hectares). Land use information was not available for 37 percent of the agricultural land, so we can assume that each category has a larger share of the total organic land.

Cereals comprise the key organic arable crop group (mainly wheat and rice), with over 1.3 million hectares, representing 0.4 percent of the total cereal area in Asia. Most organic cereals were grown in China (over 968'000 hectares) and Kazakhstan (more than 111'000 hectares). Oilseeds (mainly soybeans) are also an important crop group grown on at least 634'000 hectares (mainly in China and India) and represented 1.2 percent of the total oilseed area in Asia. The key organic cereals were rice, grain maize and wheat. Organic rice represented 41 percent of the total organic cereal area and, together with wheat (22 percent) and grain maize (19 percent), represented almost 82 percent of the total organic cereal area in Asia. Organic rice was mainly grown in China (332'000 hectares), constituting 64 percent of the total organic rice in the region. The largest organic wheat areas were also in China (174'000 hectares) followed by Kazakhstan (over 100'000 hectares), representing almost all of the total organic wheat area in Asia.

Most of the organic permanent cropland was used for coconuts (over 232'000 hectares), tea (nearly 132'000 hectares), coffee (over 67'000 hectares), nuts (over 55´000 hectares), and temperate fruit (over 53'000 hectares). The Philippines had the largest

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organic coconut area, with almost 160'000 hectares, representing 69 percent of the total organic coconut area of the region. Most of the organic coffee in Asia was grown in Indonesia, where over 60'000 hectares were reported, followed by Timor-Leste (4'100 hectares); both countries represented 95 percent of the organic coffee area in Asia. Organic coffee represented 2.5 percent of the total coffee in Asia. Almost 3.7 percent of the total tea grown in Asia was organic; most of it was in China (111'000 hectares) followed by Viet Nam (almost 8'900 hectares).

Producers

In 2018, 1'317'023 organic producers were reported in Asia. India is the country with the most organic producers (1'149'371), followed by the Thailand (58'490). Unfortunately, many countries do not report the number of producers or only report the number of companies; thus it is assumed that the number of producers is higher. Since 2004, when there were 100'000 organic producers, the number has increased over thirteen-fold.

Wild collection

In 2018, 2.8 million hectares of organic wild collection were reported in Asia. Unfortunately, detailed data is available for only 4 percent of the reported area. From the details available, wild nuts (over 55'000 hectares) and wild fruit (3'750 hectares) are the key commodities. Furthermore, bee pastures (over 56'000 hectares) play an important role. India is the country in the region with the largest organic wild collection area, with 1.5 million hectares, followed by China (1 million hectares), and Thailand (over 117'000 hectares).

Market

In Asia, organic market data is not available for most of the countries, but we can assume that the market is continually growing. Nine countries (more than 20 percent of the countries with organic data) provided organic retail sales values (Table 13, page 68). From the data available, we can assume that at least 10 billion euros of organic products were sold in Asia. For China, nearly 8.1 billion euros were reported for 2018, making the country the world's fourth-largest market for organic products. Furthermore, Japan has a large organic domestic market valued at 1.4 billion euros, and South Korea reported a market of 330 million euros (2017). More information about the Asian market is available in the chapter about the global market from Amarjit Sahota (page 138).

For more information about the Asian figures, see data tables for Asia, page 211.

Organic Agriculture in Asia: Graphs

Asia: The ten countries with the largest organic area 2018
Source: FiBL survey 2020

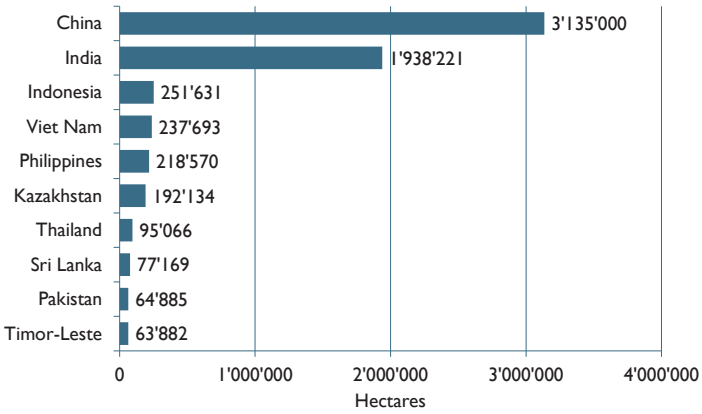


Figure 65: Asia: The ten countries with the largest organic agricultural area 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Asia: The countries with the highest organic share of total agricultural land 2018
Source: FiBL survey 2020

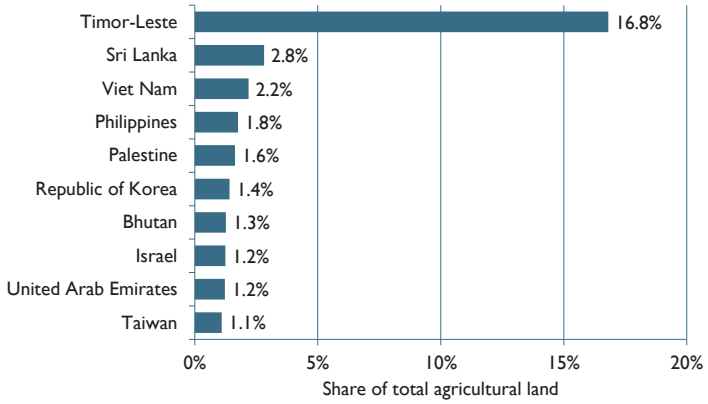


Figure 66: Asia: The countries with the highest organic share of total agricultural land 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Asia: Development of organic agricultural land 1999- 2018

Source: FiBL-IFOAM-SOEL-Surveys 2001-2020

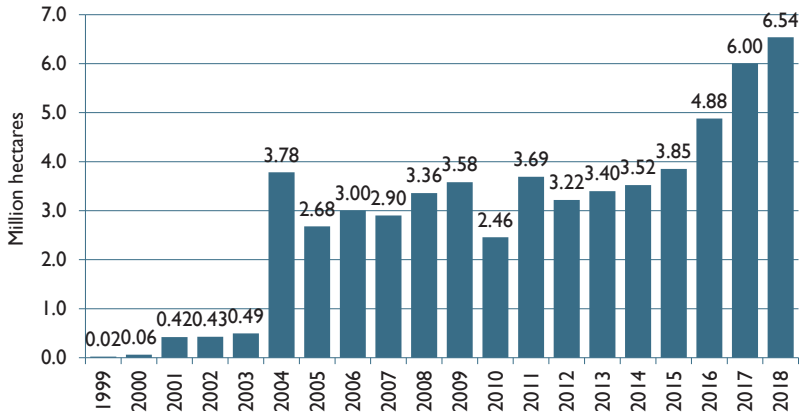


Figure 67: Asia: Development of organic agricultural land 1999 to 2018

Source: FiBL-IFOAM-SOEL surveys 2001-2020; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Asia: Use of organic agricultural land 2018

Source: FiBL survey 2020; based on information from the private sector, certifiers, and governments.

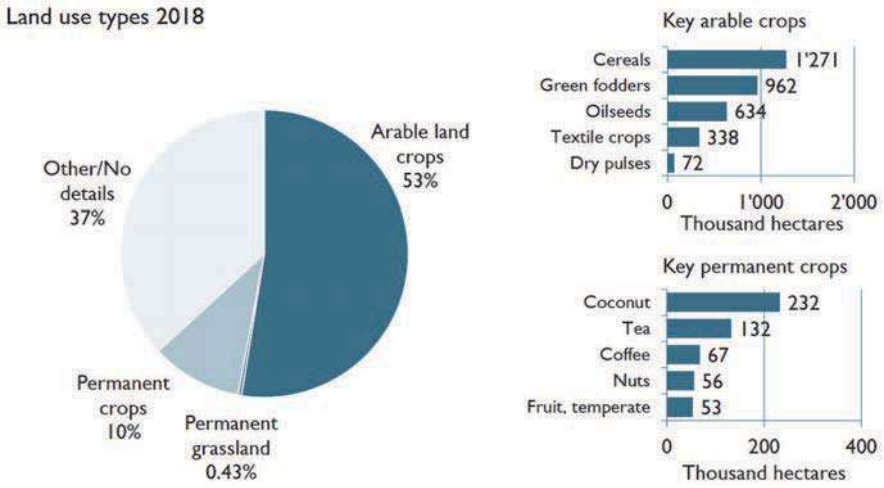


Figure 68: Asia: Use of organic agricultural land 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Organic Agriculture in Asia: Tables

Table 52: Asia: Organic agricultural land, organic share of farmland, producers 2018

For information on data year, see page 310.

Country	Area [ha]	Organic share [%]	Producers [no.]
Afghanistan	786	0.002%	10
Armenia	694	0.04%	35
Azerbaijan	37'630	0.8%	305
Bangladesh	504	0.01%	9'335
Bhutan	6'632	1.3%	4'354
Cambodia	27'550	0.5%	5'788
China	3'135'000	0.6%	6'308
Georgia	1'452	0.1%	1'075
India	1'938'221	1.1%	1'149'371
Indonesia	251'631	0.4%	18'162
Iran (Islamic Republic of)	11'916	0.03%	20
Iraq	63	0.001%	
Israel	6'666	1.2%	349
Japan	10'792	0.2%	3'678
Jordan	1'446	0.1%	23
Kazakhstan	192'134	0.1%	63
Kuwait	22	0.01%	1
Kyrgyzstan	22'118	0.2%	1'107
Lao P.D.R.	7'668	0.3%	1'342
Lebanon	1'241	0.2%	111
Malaysia	9'576	0.1%	29
Mongolia	636	0.001%	13
Myanmar	12'305	0.1%	48
Nepal	11'851	0.3%	1'622
Oman	43	0.003%	5
Pakistan	64'885	0.2%	415
Palestine	4'870	1.6%	1'440
Philippines	218'570	1.8%	12'366
Republic of Korea	24'700	1.4%	15'500
Saudi Arabia	18'631	0.01%	6
Singapore	3	0.4%	
Sri Lanka	77'169	2.8%	1'416
Syrian Arab Republic	19'987	0.1%	2'458
Taiwan	8'759	1.1%	3'556
Tajikistan	8'806	0.2%	953
Thailand	95'066	0.4%	58'490
Timor-Leste	63'882	16.8%	4
United Arab Emirates	4'687	1.2%	95
Uzbekistan	943	0.004%	1
Viet Nam	237'693	2.2%	17'169
Total*	**6'537'226**	**0.4%**	**1'317'023**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315
**Total number includes data for countries with less than three operators.*

Table 53: Asia: All organic areas 2018

Country	Agri-culture [ha]	Aqua-culture [ha]	Forest [ha]	Wild collection [ha]	Other non agri. land [ha]	Total [ha]
Afghanistan	786					786
Armenia	694			9'310		10'004
Azerbaijan	37'630	123	123	1'063		38'939
Bangladesh	504	5'781				6'285
Bhutan	6'632			7'746		14'378
Brunei Darussalam		29				29
Cambodia	27'550					27'550
China	3'135'000			973'000		4'108'000
Georgia	1'452			215	1'507	3'174
India	1'938'221			1'490'418		3'428'639
Indonesia	251'631			18'412		270'043
Iran	11'916			50'219	20'000	82'135
Iraq	63					63
Israel	6'666			4		6'669
Japan	10'792					10'792
Jordan	1'446					1'446
Kazakhstan	192'134					192'134
Kuwait	22					22
Kyrgyzstan	22'118			13'489		35'607
Lao P.D.R.	7'668			17'068		24'736
Lebanon	1'241			309		1'551
Malaysia	9'575					9'575
Mongolia	636					636
Myanmar	12'305	15				12'320
Nepal	11'851			24'422		36'273
Oman	43					43
Pakistan	64'885			44'620		109'505
Palestine	4'870					4'870
Philippines	218'570					218'570
Republic of Korea	24'700					24'700
Saudi Arabia	18'631					18'631
Singapore	3					3
Sri Lanka	77'169					77'169
Syrian Arab Republic	19'987			8'000		27'987
Taiwan	8'759	2				8'761
Tajikistan	8'806					8'806
Thailand	95'066	268		117'704	17'866	230'905
Timor-Leste	63'882					63'882
United Arab Emirates	4'687					4'687
Uzbekistan	943			5'000		5'943
Viet Nam	237'693	200'000		54'450		492'143
Total	**6'537'226**	**206'218**	**123**	**2'835'448**	**40'880**	**9'618'388**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Table 54: Asia: Land use in organic agriculture 2018

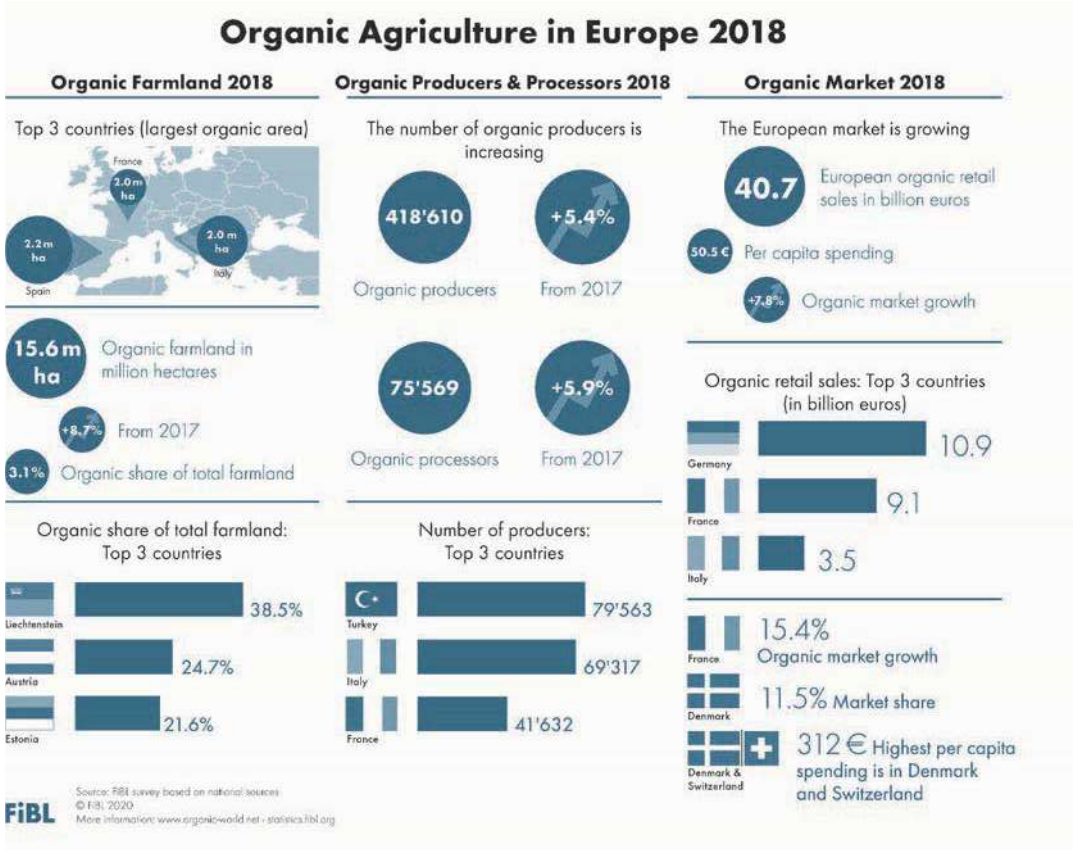
Land use	Crop group	Area [ha]
Agricultural land and crops		**2'336'057**
Arable land crops	Cereals	68'786
	Dry pulses and protein crops for the production of grain	1'127'835
	Fallow land, crop rotation	363'269
	Fresh vegetables and melons	61'425
	Medicinal and aromatic plants	10'300
	Mushrooms and truffles	1'629
	Oilseeds	59'963
	Plants harvested green	1'545
	Root crops	341'397
	Seeds and seedlings	20'349
	Strawberries	68
	Sugarcane	44
	Textile crops	2'399
	Tobacco	341'616
	Arable crops, no details	52'400
Arable land crops total		**3'434'390**
Cropland, no details		**58'861**
Other agricultural land		**13'156**
Permanent crops	Berries	**139**
	Citrus fruit	12'980
	Cocoa	376
	Coconut	232'293
	Coffee	67'152
	Flowers and ornamental plants, permanent	22
	Fruit	10'159
	Fruit, temperate	53'382
	Fruit, tropical and subtropical	34'354
	Grapes	22'590
	Medicinal and aromatic plants, permanent	17'047
	Nuts	55'613
	Olives	6'535
	Tea/mate, etc.	131'907
	Permanent crops, other	19'146
Permanent crops total		**666'832**
Permanent grassland		**27'930**
Total		**6'537'226**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Table 55: Asia: Use of wild collection areas 2018

Land use	Area [ha]
Apiculture	56'267
Berries, wild	161
Fruit, wild	3'750
Medicinal and aromatic plants, wild	56
Mushrooms, wild	0.1
Nuts, wild	55'076
Oil plants, wild	303
Palm sugar	916
Rose hips, wild	10
Seaweed	136
Vegetables, wild	4
Wild collection, no details	2'718'769
Total	**2'835'448**

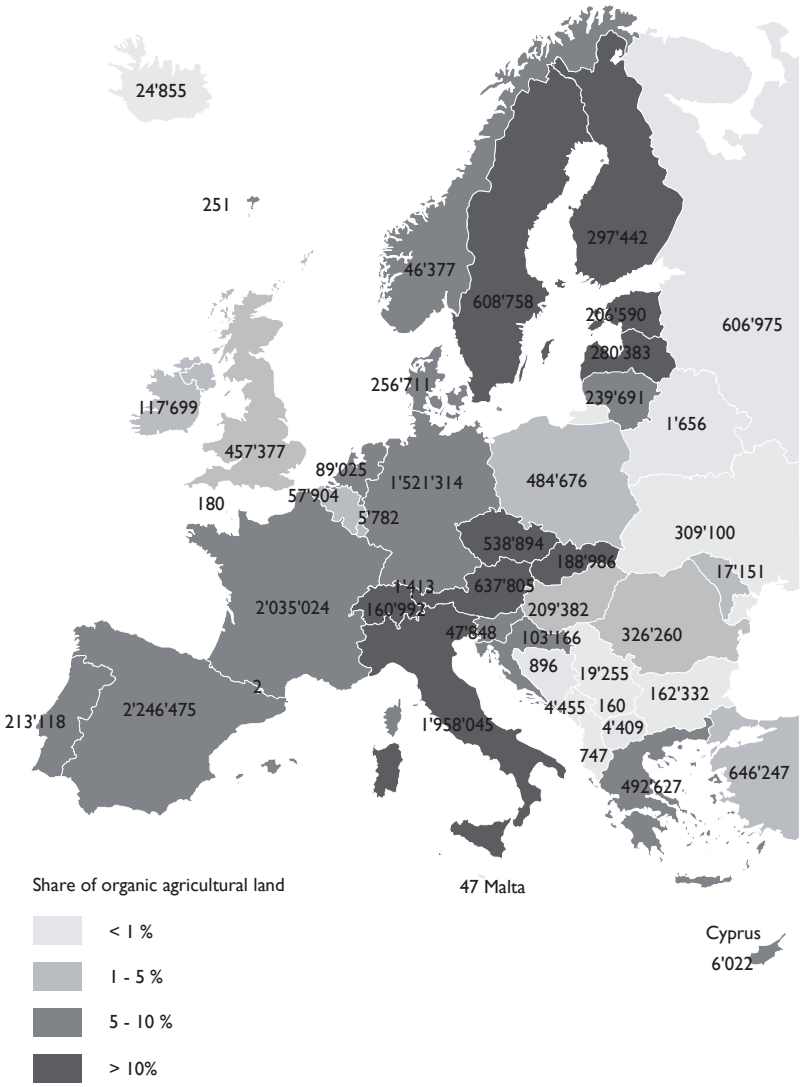
Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315



Infographic 5: Organic agriculture in Europe: Key indicators 2018

Source: FiBL-AMI survey 2020

Europe



Map 4: Organic agricultural land in the countries of Europe 2018 (in hectares)

Source: FiBL-AMI survey 2020; based on information from the private sector, certifiers, governments, Eurostat and the Mediterranean Organic Agriculture Network. For detailed information on sources, please check annex.

Organic in Europe: Recent Developments

HELGA WILLER,[1] BRAM MOESKOPS,[2] EMANUELE BUSACCA,[3] LÉNA BRISSET[4], AND MARIA GERNERT[5]

In 2018, in Europe, the organic area and market continued to grow. Data show that the European organic food market increased to more than 40 billion euros; however, only by single digits (+7.5 percent) and thus slower than in the past. The area grew more or less at the same pace as the market did (Figure 69; see chapter on European organic statistics, page 227).

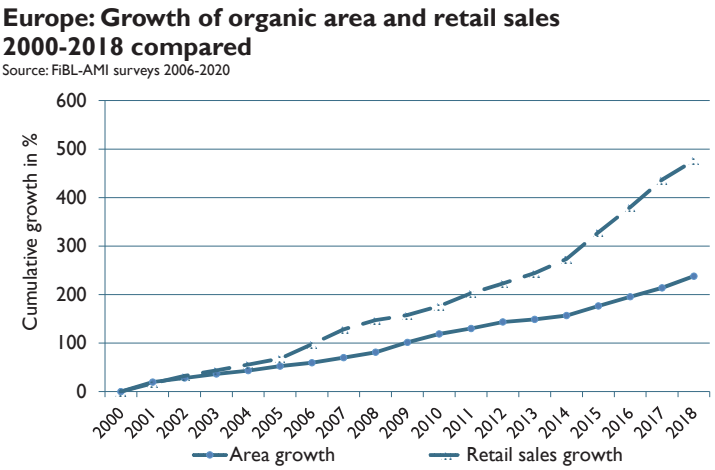


Figure 69: Europe and the European Union: Growth of organic farmland and retail sales compared, 2000-2018

Source: FiBL-AMI surveys

Projections from the European Commission indicate that increasing demand for organic food is expected to boost EU supply in the short term. However, over the medium term, challenges for conversion to organic farming, as well as further market shifts towards other environmentally-friendly alternatives, could slow down the growth of organic production, according to the European Commission (2019a). Facts and developments presented in this chapter – the EU regulation on organic

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production, the Common Agricultural Policy (CAP), and research efforts – will also influence the evolution of the sector.

New EU organic rules adopted

In June 2018, the new European Union (EU) Regulation 2018/848 on production and labelling of organic products was published. The new EU organic regulation will apply from 01 January 2021. The text that has been adopted represents the "Basic Act". This means that many details of the text still have to be developed and adopted in the form of delegated and implementing acts. The process of development of secondary legislation started in June 2018 and should be concluded at the latest by June 2020, six months before the actual application of the new organic regulation. More details about the new organic regulation can be found on page 150.

Proposal for the Common Agricultural Policy post-2020 launched

In June 2018, the European Commission launched its proposal for the Common Agricultural Policy (CAP) for the period 2021 to 2027. The new CAP presents a New Delivery Model founded on a results-based approach, which gives more flexibility to member states in the implementation of the policy objectives.

Organic farming can make a decisive contribution towards a sustainable food and farming sector while satisfying citizens' preferences. However, large-scale conversion to organic is only possible if the CAP's ambition is revised upwards, allowing more farmers to make the necessary additional efforts and investments. With the right incentives and an adequate budget in the next CAP, many more farmers could make an even larger contribution to the environment, climate, and rural communities beyond 2020 (IFOAM EU, 2019).

The organic movement is concerned about the significant cuts foreseen to the second pillar, Rural Development, which so far has been providing crucial support to farmers for the conversion to organic and has helped them with maintenance payments. The second pillar should be strengthened, and more than 30 percent of its budget should be dedicated to the climate and environment CAP objectives (IFOAM EU 2019).

As part of the new green architecture, the newly proposed eco-schemes offer a good opportunity to compensate farmers who want to do more for the climate and the environment. The schemes are 100 percent funded under the first pillar, which constitutes over three-quarters of the total CAP budget. However, essential elements are still missing: eco-schemes should be better defined in order to favour farming systems that provide multiple objectives including organic farming. Moreover, a minimum of 30 percent of the first pillar should be dedicated to this new tool.

Last but not least, the increased flexibility of the CAP must be counterbalanced with strong common safeguards. Ambitious ring-fencing of at least 70 percent of the entire CAP budget across both pillars can avoid a downward spiral for the climate and the environment.

Organic Agriculture and the SDGs

At an event on organic agriculture and the Sustainable Development Goals (SDGs) held in Brussels in February 2019, members of the Research Institute of Organic Agriculture (FiBL) and further scientists presented research results showing that in low-income countries organic farming can represent an economic advantage for smallholders in addition to the well-known environmental benefits that the organic system brings. Organic agriculture is, therefore, a means of achieving the United Nations' Sustainable Development Goals (SDGs), according to the organizers (de Porras 2019).

SDG 2 seeks to end hunger and malnutrition and ensure access to safe, nutritious and sufficient food (Eurostat 2019). According to Eurostat, organic farming is a production method that puts the highest emphasis on environmental protection and animal welfare considerations, avoiding or largely reducing the use of synthetic chemical inputs such as fertilisers, pesticides, additives and medical products. It is interesting to note that the European Union (Eurostat 2019) uses the indicator "Area under organic farming" to measure measures progress towards SDG 2 (among other indicators)). Eurostat (2019) notes that with 7 percent of the farmland being organic in 2017, significant progress towards SDG 2 has been made. However, while the European Commission did not set a target for the further development of the organic area, Germany did, declaring it aimed to achieve an organic share of 20 percent of the total farmland – as a contribution to achieving SDG 2 (Bundesregierung 2018).

In Germany, the organic share of the total market is also used to measure the progress towards SDG 12 – sustainable consumption (Bundesregierung 2018).

Research

Organic farming research is funded under national research programs or national organic action plans as well as through European programmes. Several organic farming research projects have been funded under the EU framework programmes since the mid-1990s. So far, the following projects focussing on organic agriculture have been funded by the current framework programme (Horizon 2020): OK-Net Arable, OK-Net EcoFeed[1] (see more information below), LIVESEED[2], ECOBREED[3], BRESOV[4] (three projects on organic seed and plant breeding). RELACS[5] and Organic-PLUS,[6] which investigate alternatives for contentious inputs used in organic farming, started in spring 2018. In 2019, a new project addressing animal welfare in organic farming, PPilow, started as well as a thematic network on organic fruit production, BioFruitNet.

[1] https://ok-net-ecofeed.eu/
[2] https://www.liveseed.eu/
[3] http://ecobreed.eu/
[4] https://bresov.eu/
[5] https://relacs-project.eu/
[6] https://organic-plus.net/

In 2019, the CORE Organic network, which joins forces of the EU Member States and funds transnational research projects, celebrated its 15th anniversary. The current CORE Organic consortium,[1] which includes 26 partners from 19 countries, selected 12 projects that will run until 2021 and are distributed across four thematic areas: Plant production systems, animal feed, livestock systems, and organic food processing.[2] Also in 2019, CORE Organic joined forces with the ERA-Net SUSFOOD2 in the transnational Call "Towards sustainable and organic food systems" focusing on the following research themes: Resource-efficient, circular and zero-waste food systems, diversity in food from field to plate, mild food processing, and sustainable and smart packaging.

The outcomes of the CORE Organic projects are archived in the Organic Eprints open access repository, which today has more than 22'000 entries (Willer/Rasmussen 2019).

Organic Farm Knowledge for farmers and advisers to exchange knowledge

In December 2018, the Horizon 2020-funded "OK-Net Ecofeed" project launched the extended knowledge platform Organic Farm Knowledge (www.organic-farmknowledge.eu), which was originally set up in the framework of OK-Net Arable. The platform aims to promote the exchange of information and share practical solutions among farmers across Europe. The platform is available in 12 languages. In 2019, the platform started to be expanded to cover tools and solutions related to organic feed for pigs and poultry, as well as seed, breeding, and many other topics. The final goal is for the platform to become the European reference platform for practical knowledge on organic farming.

Field days – Exchange meetings of farmers and researchers

National and international exchange meetings of farmers, researchers, and other actors have been gaining in importance in recent years. The French "Tech and Bio" and the Swiss organic arable day ("Bioackerbautag" recently alternating annually with the organic livestock days "Bioviehtag") have taken place for several years now. In Germany, in 2019, the second edition of the organic field days (Ökofeldtage) took place, attracting more than 11'000 visitors.

Science Day 2019 at Biofach

On 15 February 2019, the TP Organics' Science Day took place at BIOFACH under the title **"**Research, Innovation and Knowledge Exchange – Challenges of the Organic Sector**"**. TP Organics[3] is the European Technology Platform for Organic Food and Farming. The Science Day was dedicated to the draft research topics in TP Organics' new Strategic Research and Innovation Agenda, "Diversified farming systems based on ecological approaches", "Redesign of food and agricultural policies from local to

[1] CORE Organic was initiated as a part of the Commission's ERA-NET Scheme in 2004. It intends to step up cooperation between national research activities and aims to enhance the quality, relevance, and utilisation of European research resources through coordination and collaboration.
[2] http://projects.au.dk/coreorganiccofund
[3] www.tporganics.eu

EU level", "Sustainable food systems for sustainable consumption", "Research & innovation in light of the new organic regulation" and "Organics and emerging technologies". In parallel workshops, the participants discussed further substantiating the content in terms of the specific challenges, the research scope as well as expected impacts. The Strategic Research and Innovation Agenda was produced in 2019 in view of Horizon Europe, the follow-up research and innovation framework programme of Horizon 2020. In the second part of Science Day, the Organic Farm Knowledge platform was launched by FiBL before a policy debate with the European Commission, Bundesanstalt für Landwirtschaft und Ernährung and organic farmers' association Naturland took place on promoting innovation and knowledge exchange between researchers, farmers and food small and medium enterprises.

Organic Innovation Days

The 5th edition of the Organic Innovation Days,[1] TP Organics' annual event, took place in cooperation with the EU projects LIAISON[2] and XF-ACTORS[3] in Brussels in December 2019. The Organic Innovation Days aim to discuss research needs and innovations within and outside the organic sector to transform our food systems together with a broad range of stakeholders – including companies and researchers, farmers and farmer organisations, and policymakers across Europe. The first day showed the important role of organic farming and agroecology in the transition of food and farming systems. On the second day, TP Organics launched its new Strategic Research & Innovation Agenda[4] (see below). In a high-level policy debate with the European Commission and FiBL Europe, farmer representatives discussed the needs of young organic farmers innovating for the future. In a panel discussion, participants from different EU projects shared their views on the use of technology in organic food and farming. The panel stressed the importance of knowledge sharing and participation of farmers as well as consumers in research to create a fair share along the value chain.

Horizon Europe

Horizon Europe, the EU's 9th Framework Programme for research and innovation (R&I), will provide a proposed budget of 100 billion euros for the period 2021-2027. TP Organics published a briefing[5] that aims to provide an overview of the programme (its structure and content) and policy process, including the anticipated timeline. The European Parliament and the Council of the EU reached a provisional agreement on Horizon Europe in spring 2019. Following this agreement, the European Commission has begun the preparation of the first Strategic Plan. The Strategic Plan will identify missions and European Partnerships and serve to prepare the content of the work

[1] http://tporganics.eu/organic-innovation-days/
[2] http://liaison2020.eu/
[3] https://www.xfactorsproject.eu/
[4] https://tporganics.eu/wp-content/uploads/2019/12/ifoam-sria-full-final.pdf
[5] https://tporganics.eu/wp-content/uploads/2019/12/tporganics-horizon-europe-briefing.pdf

programmes and calls for proposals for the first four years of Horizon Europe. The first work programme is expected by autumn 2020.

Ten billion euros are to be allocated to the Cluster "Food, Bioeconomy, Natural Resources, Agriculture and Environment". Thanks to TP Organics, the legal texts of Horizon Europe state that Horizon Europe should support organic farming and agroecology. TP Organics also welcomes the planned Mission for Soil Health and Food as well as the partnership for "Accelerating farming systems transition" which will be crucial to support the upscaling of organic farming and agroecology. However, TP Organics is concerned that the inclusion of the "Innovation Principle" in Horizon Europe could be used to undermine the Precautionary Principle, and hence social and environmental protections in the EU[1]. Innovation is only useful if it does not harm public and environmental health.

Strategic Research and Innovation Agenda of TP Organics

TP Organics' new Strategic Research & Innovation Agenda for Organics & Agroecology (TP Organics 2019) that was launched during the Organic Innovation Days 2019 (see above) is the outcome of an intensive participatory development process which included discussions and stakeholder consultations at workshops and online held in 2018-2019 as well as the collaboration of many different experts. Reflecting the combined knowledge and expertise of the whole organic value chain, this key document serves to relay the research needs of the organic sector to policymakers who have a crucial role to play in the transformation of European food and farming systems that is urgently needed by ensuring a common, integrated and holistic approach to food policy.

Research and innovation on organics and agroecology can enable this transition towards a more sustainable future for all. The four main research areas (moving organics further, redesign of food and agricultural policies, climate-resilient and diversified farming systems, and sustainable value chains) and 29 priorities identified require proper support at the EU level, in particular through Horizon Europe (see above), the European Partnerships and Missions as well as EIP-AGRI to leverage the potential of organic food and farming and agroecology. The priorities reflect the knowledge and innovation needs of farmers, processors, companies and civil society groups that are all eager to work with researchers to transform the food and farming systems of Europe. TP Organics is convinced that dedicating appropriate funding and support to these priorities will help steer Europe's food and farming systems towards full sustainability and thriving societies.

[1] This tool was created by industry lobbyists to block and delay important social, health and environmental regulations. Despite several efforts by civil society organisations including TP Organics to remove the Innovation Principle from Horizon Europe, it is still part of the recitals. More information about this dangerous principle making its way into EU law is available at https://tporganics.eu/innovation-principle/

20th Organic World Congress

Every three years, the organic sector comes together to host the world's largest organic gathering, the Organic World Congress (OWC). In 2020, the 20th OWC will be held in Europe for the first time since 2008, and it will take place from 21 to 27 September in Rennes, France. Drawing from the motto, „From its Roots, Organic Inspires Life", OWC 2020 will aim to provide organic and likeminded stakeholders working toward sustainable agriculture, value chains, and consumption with an opportunity to exchange their knowledge, innovations, and experiences. In the days leading up to the congress, delegates have the opportunity to participate in one of eight, topic-specific pre-conferences, one of which will focus on organic farming statistics.[1]

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[1] More information about the pre-conferences is available at https://owc.ifoam.bio/2020/pre-conferences/improving-transparency-along-the-supply-chain

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- organic-market.info: Market News and updates: www.organic-market.info
- tporganics.eu: European Technology Platform TP Organics

Europe and the European Union: Key indicators 2018

Indicator	Europe	European Union	Top 3 countries Europe
Organic farmland in hectares	15.6 million ha	13.8 million ha	Spain (2.2 million ha) France (2.0 million ha) Italy (2.0 million ha)
Organic share of total farmland	3.1 %	7.7 %	Liechtenstein (38.5%) Austria (24.7%) Estonia (21.6%)
Increase in organic farmland 2017-2018 in hectares	1.25 million ha	1 million ha	France (+290'604 ha) Spain (+164'302 ha) Germany (+148'157 ha)
Relative increase in organic farmland 2017-2018	8.7%	7.6%	Montenegro (+64%) Ireland (+60%) North Macedonia (+52%)
Land use [in million hectares]	Arable crops: 7.5 Permanent crops: 1.7 Permanent pastures: 6.2	Arable crops: 6.1 Permanent crops 1.5 Permanent pastures: 6.0	
Top arable crop groups	Cereals: 2.6 million ha Green fodder: 2.5 million ha Dry pulses: 0.5 million ha	Green fodder: 2.3 million ha Cereals: 2.2 million ha Dry pulses: 0.4 million ha	Largest arable areas: France (1.1 million ha) Italy (0.9 million ha) Germany (0.6 million ha)
Top permanent crop groups	Olives: 0.6 million ha Grapes: 0.4 million ha Nuts: 0.3 million ha	Olives: 0.5 million ha Grapes: 0.3 million ha Nuts: 0.3 million ha	Largest permanent crop areas: Spain (0.6 million ha) Italy (0.5 million ha) Turkey (0.2 million ha)
Wild collection area	17.2 million ha	13.9 million ha	Finland (11.2 million ha) Romania (1.8 million ha; 2014) Albania (0.6 million ha)
Producers [no.]	418'610	327'222	Turkey: (79'563) Italy (69'317) France (41'632)
Processors [no.]	75'569	71'960	Italy (20'087) France (16'651) Germany (15'441)
Importers [no.]	5'790	5'034	Germany (1'723) Switzerland (548) France (545)
Retail sales	40.7 billion euros	37.4 billion euros	Germany (10'910 million euros) France (9'139 million euros) Italy (3'483 million euros)
Growth of retail sales 2017-2018	7.8%	7.7%	France (15.4%) Switzerland (13.3%) Denmark (12.9%)
Organic share of total market	No data	No data	Denmark (11.5 %) Switzerland (9.9 %) Sweden (9.6 %)
Per capita consumption [euros]	50 euros	76 euros	Switzerland (312 euros); Denmark (312 euros) Sweden (231 euros)

Source: FiBL-AMI survey 2020.
For detailed data sources see annex

Organic Farming and Market Development in Europe and the European Union

HELGA WILLER[1], BERNHARD SCHLATTER AND[2] DIANA SCHAACK[3]

In 2018, the development of the organic sector in Europe was characterized by the trend that both market and area grew more or less at the same pace. This marks a change compared to the previous years when the market grew at a faster rate than the area/production. It remains to be seen if the trend continues.

1 Key facts and figures: Production and market highlights

More than 15 million hectares of farmland were organic in Europe in 2018 – Spain had the largest area

In Europe, 15.6 million hectares were managed organically in 2018 (European Union: 13.8 million hectares). With more than 2.2 million hectares, Spain continued to be the country with the largest organic area in Europe (more than 14% of the European organic farmland), followed by France (2 million hectares), and Italy (1.95 million hectares).

European organic farmland increased by more than one million hectares

The organic land increased by almost 1.3 million hectares in Europe (with a major increase in farmland in the Russian Federation) and by almost 1 million hectares in the European Union, representing an increase of 8.7 percent in Europe and 7.6 percent in the European Union. Growth was a bit higher than in 2017 and higher than in the first years of the current decade. From 2009 to 2018, the organic agricultural land increased by more than two thirds.

Liechtenstein is the country with the highest organic area share in the world

Organic farmland in Europe constitutes 3.1 percent of the total agricultural land and 7.7 percent in the European Union. In Europe (and globally), Liechtenstein has the highest organic share of all farmland (38.5 percent) followed by Austria, the country in the European Union with the highest organic share of agricultural land (24.7 percent.

Organic producers, processors and importers on the rise

There were almost 420’000 organic producers in Europe (European Union: almost 330’000), with the largest numbers in Turkey (79'563) and Italy (69'317). While in 2018 the number of producers grew by 5.4 percent in Europe (7.1 percent in the European Union), growth was 64 percent in Europe and 56 percent in the European Union from 2009-2018.

[1] Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[2] Bernhard Schlatter, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, www.fibl.org
[3] Diana Schaack, Agrarmarkt Informations-Gesellschaft mbH, Bonn, Germany, www.ami-informiert.de

There were almost 75’600 organic processors in Europe (+5.9 percent compared to 2017) and almost 72’000 in the European Union (+5.5 percent). The country with the largest number of processors was Italy (20'087).

The number of importers grew faster than the number of producers and processors: Almost 5’800 importers (+ 8.9 percent) were counted in Europe and more than 5’000 in the European Union (+9.8 percent). Germany had the most importers (1'723).

Retail sales reached the 40 billion euro mark - Market continues to grow

Organic retail sales in Europe were valued at 40.1 billion euros (37.4 billion euros in the European Union). The European Union represents the second largest single market for organic products in the world after the United States. With 10.9 billion euros of retail sales, Germany is the biggest market in Europe and the second biggest in the world.

The European organic market recorded a growth rate of 7.8 percent (European Union: 7.7 percent). Among the key markets, the highest growth was observed in France (15.4 percent). In the decade 2009-2018, the value of European and European Union organic markets more than doubled.

Organic imports – China is the largest supplier

Data on organic imports to the European Union in 2018 show that a total of 3.3 million metric tons of organic products were imported the to European Union. The largest supplier was China.

European consumers spend more on organic food

European consumers spent 50 euros on organic food per person in 2018 (European Union: 76 euros). Per capita consumer spending on organic food has doubled in the last decade. Danish and Swiss consumers spent the most on organic food per capita (312 euros).

Highest organic market shares are in Europe

Globally, European countries account for the highest shares of organic food sales as a percentage of their respective food markets. Denmark has the highest organic market share globally (11.5 percent) and was the first country to pass the 10 percent mark.

2 Organic agricultural land: Area, organic shares, growth

Table 56: Europe: Organic agricultural land in Europe and the European Union 2018

	Organic area [million ha]	Organic share [%]	Change 2017-2018 [%]	Change 2017-2018 [million ha]	Change 2008-2018 [%]	Change 2008-2018 [million ha]
European Union	13.8	7.7%	7.6%	1.0	65%	5.4
Europe	15.6	3.1%	8.7%	1.3	69%	6.4

Source: FiBL-AMI survey based on Eurostat and national data sources. For country details, see Table 63.

2.1 Organic agricultural land

In 2018, 15.6 million hectares were farmed organically in Europe and almost 13.8 million hectares in the European Union (Table 56). Almost 90 percent of Europe's organic farmland was in the European Union. The countries with the largest areas of organic land were Spain (14 percent of Europe's organic farmland), France, Italy, and Germany. Slightly more than half of Europe's organic farmland was in these countries (Figure 70). A bit more than one-fifth of the world's organic farmland was in Europe. While in former years this share amounted to one quarter of the world's organic farmland, it went down due to an impressive area increase in Australia in 2017.

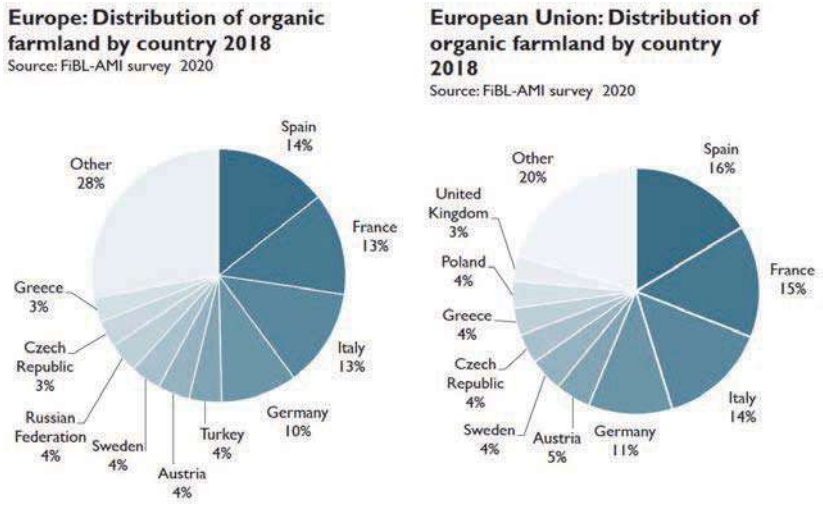


Figure 70: Europe: Distribution of organic farmland by country 2018

Source: FiBL-AMI survey 2020 based on national data sources and Eurostat
For detailed data sources see annex

Europe: Organic agricultural land by country 2018

Source: FiBL-AMI survey 2020

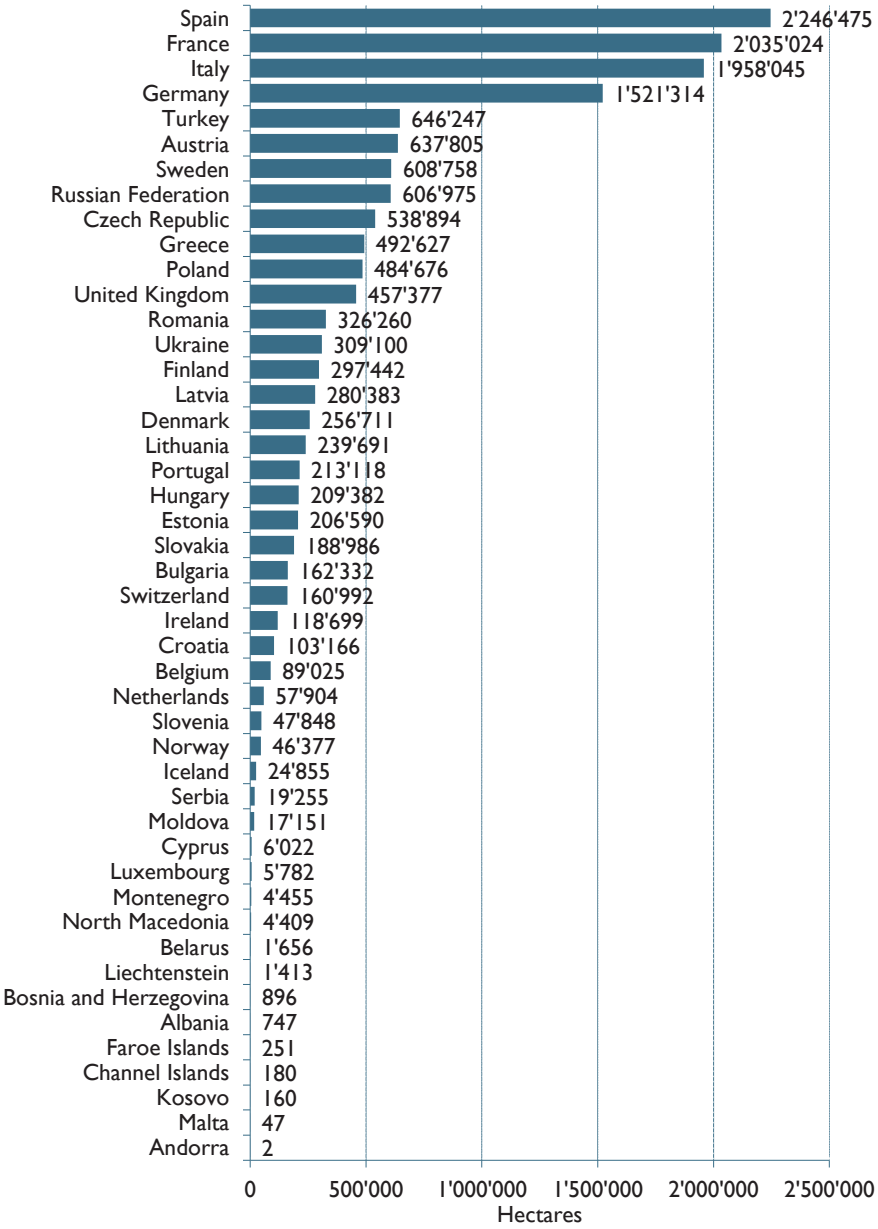


Figure 71: Europe: Organic agricultural land by country 2018

Source: FiBL-AMI survey 2020 based on Eurostat national data sources.
For detailed data sources see annex.

2.2 Organic shares of total agricultural land

In Europe, 3.1 percent of the agricultural land is organic and in the European Union, 7.7 percent (Table 56). In ten countries (European Union: eight), ten percent or more of the agricultural land is managed organically (Figure 72). The countries with the highest organic shares are Liechtenstein (38.5 percent), Austria (24.7 percent), Estonia (21.6 percent), and Sweden (19.9 percent). Liechtenstein is the country with the highest organic farmland share in the world.

2.3 Growth of organic agricultural land

In 2018, the organic agricultural land in Europe increased by 1.25 million hectares (EU: almost 1 million hectares) or 8.7 percent (EU 7.6 percent). Growth was therefore comparable with that of 2015 and 2016 and considerably faster than between 2011 and 2014 (Figure 73, Figure 74). In Europe, the absolute growth was higher than in the European Union, due to a major increase in organic farmland in the Russian Federation reported by one international certifier.

The countries that contributed the most to the growth were France, Spain, Germany and the Russian Federation, with 730'000 additional hectares together (Figure 75). The highest relative increases were in Montenegro (+64 percent) Ireland (+60 percent) and North Macedonia (+52 percent). However, there were also countries that showed a decrease in organic land such as Portugal, the United Kingdom and Poland (Table 63).

2.4 Conversion status of organic farmland

Most, countries provided data on their fully converted and under-conversion areas, but such details are not available for all countries – for instance, for Austria, Germany, and Switzerland (Table 64).

In Europe, of the 15.6 million hectares of organic agricultural land, 10.5 million hectares were fully converted[1] (9.2 million out of 13.8 million hectares in the European Union), and at least 2.7 million hectares were under conversion (2.4 million in the European Union). This suggests that, in the near future, an increase in the supply of organic products can be expected (Figure 76).

By country, the largest in-conversion areas are in Western and Southern European countries, notably France (532'452 hectares), Italy (467'192 hectares), Spain (316'745 hectares), and Greece (175'874 hectares) (Table 64).

[1] Without Austria, Germany and Switzerland

Europe: Organic share of total agricultural land by country and country group 2018

Source: FiBL-AMI survey 2020

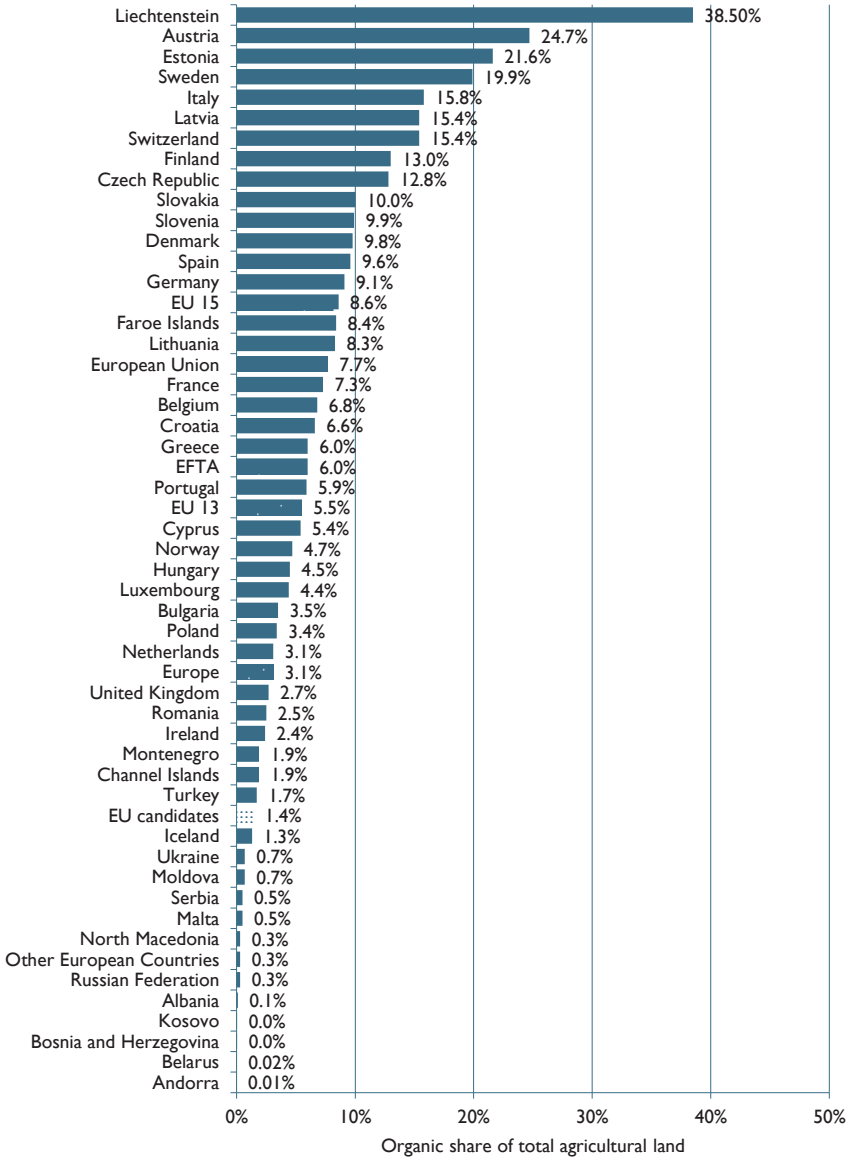


Figure 72: Europe: Organic shares of total agricultural land 2018

Source: FiBL-AMI survey 2020 based on national data sources and Eurostat
For detailed data sources see annex of this book.
EU Candidates = Candidates and Potential Candidate countries of the European Union; EFTA = European Free Trade Association; EU = European Union; EU-13 = countries, which became members of the European Union in or after May 2004; EU-15 = countries, which were member countries of the European Union before May 2004.

Europe and European Union: Development of organic agricultural land 1985-2018

Source: Nic Lampkin, FiBL-AMI survey 2020, based on national data sources and Eurostat

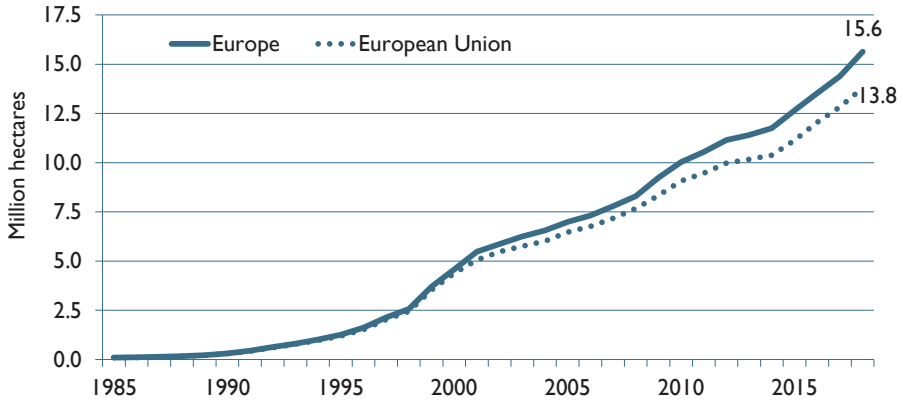


Figure 73: Europe and the European Union: Development of organic agricultural land 1985-2018

Source: FiBL-AMI Surveys 2006-2020 based on national data sources and Eurostat. Data from before 2000 based on surveys from Nic Lampkin. The data for the European Union cover all countries that were members of the European Union in 2018.

Europe and European Union: Growth rates of organic agricultural land 1986-2018

Source: FiBL-AMI survey 2020, based on national data sources and Eurostat

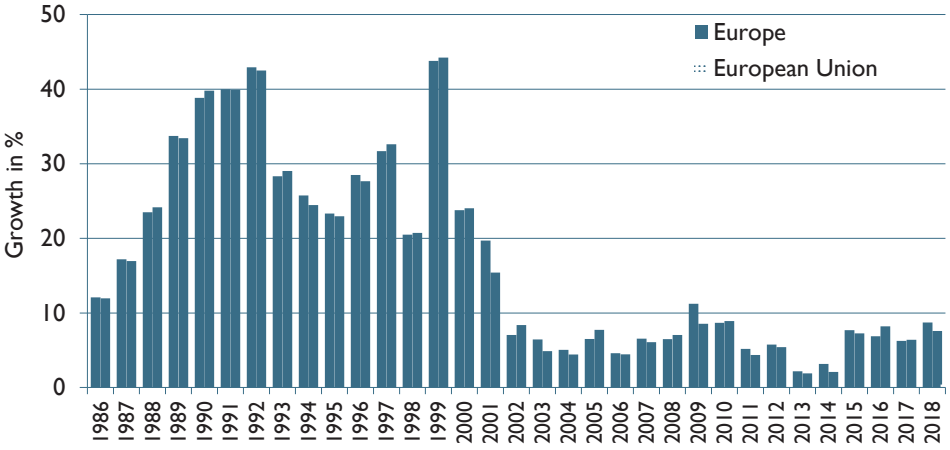
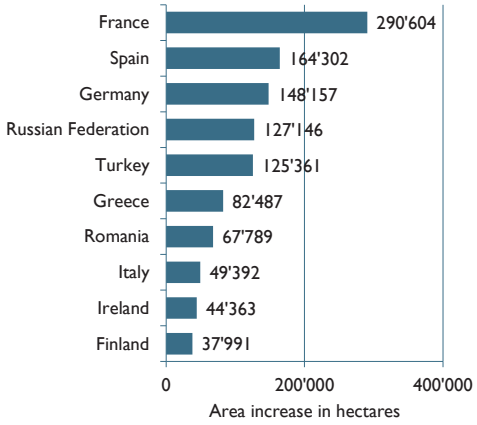


Figure 74: Europe: Growth rates for organic agricultural land in Europe and the European Union 1985-2018

Source: FiBL-AMI Surveys 2006-2020 based on national data sources and Eurostat. Data from before 2000 based on surveys from Nic Lampkin. For detailed data sources see annex.

Europe: The 10 countries with the highest growth in organic farmland in 2018 (hectares)
Source: FiBL-AMI survey 2020 based on Eurostat and national data sources



Europe: The 10 countries with the highest relative growth in organic agricultural land in 2018 (%)
Source: FiBL-AMI survey 2020 based on Eurostat and national data sources

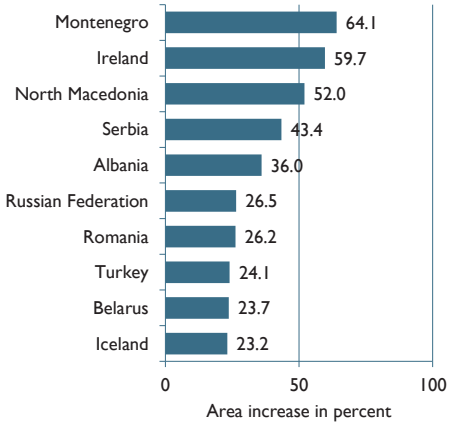


Figure 75: Europe: The ten countries with the highest growth in organic agricultural land in hectares and percentage in 2018

Source: FiBL-AMI survey 2020 based on national data sources and Eurostat
For detailed data sources see annex.

Europe and European Union: Conversion status of organic farmland 2018
Source: FiBL-AMI survey 2020

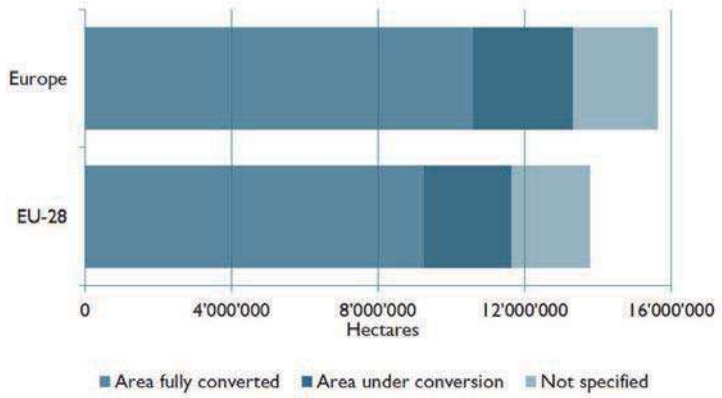


***Figure 76*: Europe and the European Union: Conversion status of organic land in Europe and the European Union 2018**

Source: FiBL-AMI survey 2020 based on national data sources and Eurostat
For detailed data sources see annex.

3 Land use and crops grown in organic agriculture

3.1 Land use

For all countries in Europe, land use and crop details are available. In this respect, Europe differs substantially from other parts of the world, for which such data is often not available. The area for all land use types[1] has grown steadily since 2004.[2]

Table 57: Europe and the European Union: Land use 2018

Crop group	Europe [Million hectares] (Share of total)	European Union [Million hectares] (Share of total)	Change 2017-2018 Europe/EU [%]	Change 2009-2017 Europe/EU [%]
Arable land	7.4 (2.7%)	6.1 (5.8%)	11.8%/10.5%	87%/79%
Permanent grassland	6.2 (3.5%)	6.0 (9.3%)	6.0%/6.0%	51%/52%
Permanent crops	1.7 (11.4%)	1.5 (12.5%)	5.8%/5.5%	70%/73%
Total	**15.6 (3.1%)**	**13.8 (7.7%)**	**8.7%/7.6%**	**69%/66%**

Source: FiBL-AMI survey 2020 based on national data sources Eurostat.
Note: Total includes other agricultural land and correction values for double-cropped areas.

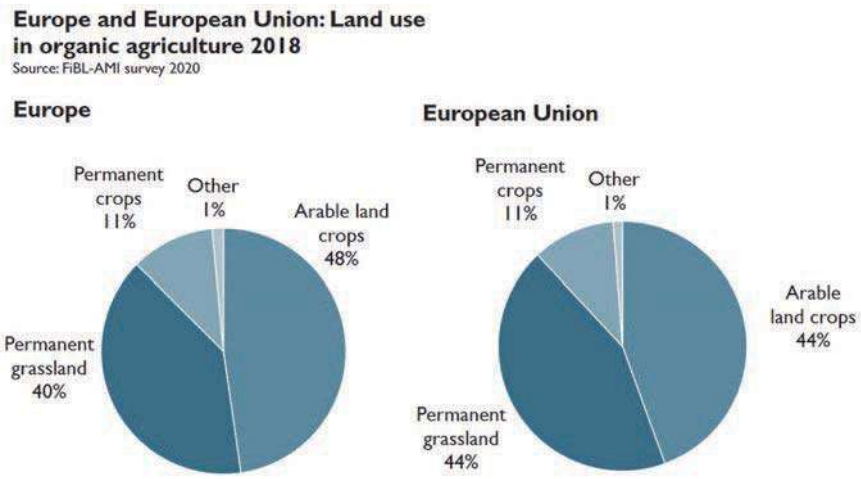


Figure 77: Europe: Distribution of land use in organic agriculture 2018

Source: FiBL-AMI survey 2020 based on Eurostat and national data sources

[1] The main land use types are:
› Arable land crops (mainly cereals, fresh vegetables, green fodder and dry pulses and oilseeds),
› Permanent grassland (pastures and meadows), and
› Permanent crops (fruit trees and berries, olive groves and vineyards).

[2] In 2004, FiBL started its data collection on organic crop and land use data.

Table 57 and Figure 77 show that arable land constitutes a large part of the organic farmland, with almost 7.5 million hectares in Europe and 6.1 million hectares in the European Union (48 and 44 percent of the organic farmland, respectively). The arable land share is higher in Europe as the Russian Federation and Ukraine have large areas for the production of cereals, oilseed, and dry pulses. Permanent grassland accounted for 6.2 million hectares in Europe and 6 million hectares in the European Union. Permanent crops constituted 11 percent of the organic farmland with 1.7 and 1.5 million hectares in Europe and the European Union, respectively. Compared to total agriculture (based on FAO land use data and not strictly comparable), the organic arable land constitutes 2.7 percent of the total arable land in Europe and 5.8 percent in the European Union. Whereas the organic share of total permanent grazing area is as high as 9.3 percent in the European Union, it is lower in Europe (3.6 percent). Permanent crops have the highest organic shares: 12.5 percent in the European Union and 11.4 percent in Europe.

The largest increase in 2017-2018 was in arable crops (11 percent in Europe), mainly because additional organic arable area was reported for Russia. In the European Union, arable land increased by 10.5 percent. Grassland and permanent crops increased by approximately 6 percent (Table 57, Figure 79, Figure 80). Both arable and permanent crops almost doubled in the decade 2009-2018 and thus showed a greater increase than the permanent grassland, which grew by about 50 percent (Table 57, Figure 79, Figure 80). It also shows the intensification of organic agriculture as the importance of extensive grassland is decreasing. By country, the largest permanent grassland or grazing area is in Spain with almost 1.2 million hectares, followed by Germany and France (Figure 78). The largest cropland area (i.e., arable and permanent crops together) is in Italy (1.4 million hectares), France (1.3 million hectares) and Spain (1.0 million hectares). (Figure 78).

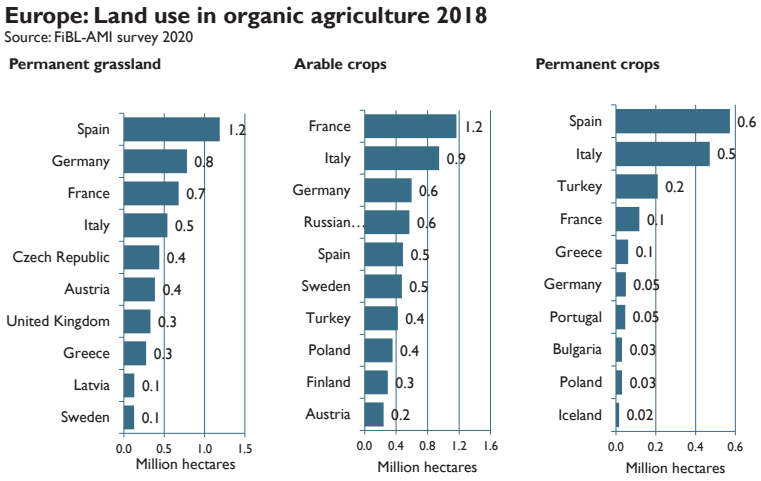


Figure 78: Europe: Land use in organic agriculture by top 10 countries 2018

Source: FiBL-AMI survey 2020 based on Eurostat and national data sources

Europe: Growth of area by land use type 2004-2018
Source: FiBL-AMI surveys 2006-2020

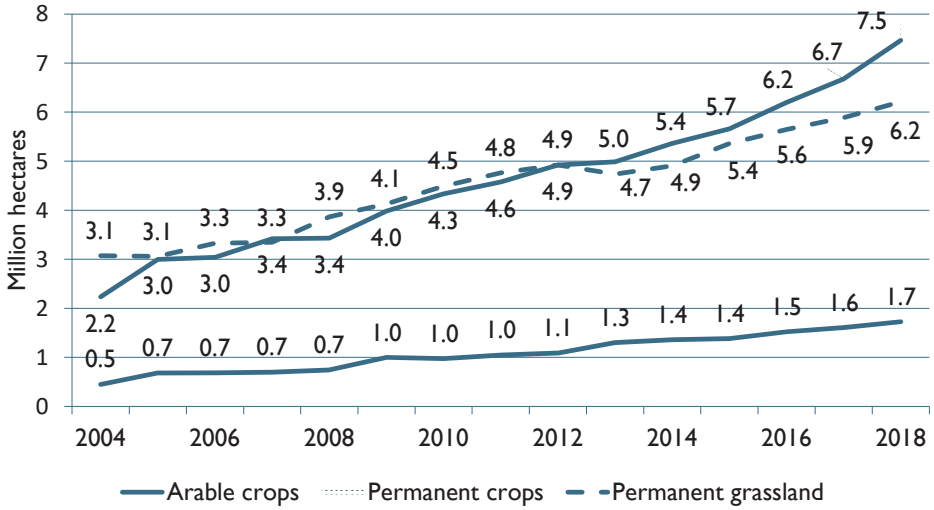


Figure 79: Europe: Growth in organic agricultural land by land use type 2004-2018

Source: FiBL-AMI Surveys 2006-2020 based on national data sources and Eurostat

European Union: Growth area by land use type 2004-2018
Source: FiBL-AMI surveys 2006-2020

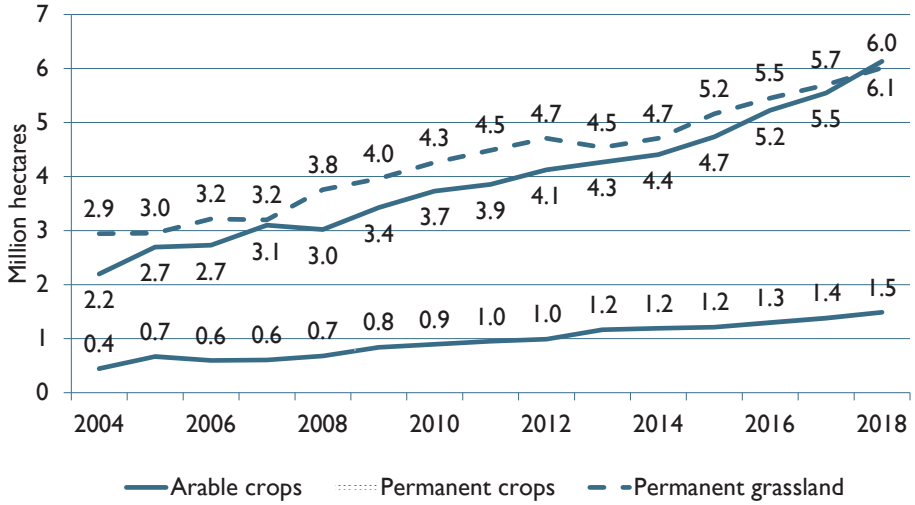


Figure 80: European Union: Growth in organic agricultural land by land use type 2004-2018

Source: FiBL-AMI Surveys 2006-2020 based on national data sources and Eurostat

3.2 Crops grown in organic agriculture

Except for a decline of tropical and subtropical fruits (decline in Turkey but increase in other countries) and a decline of citrus fruit (decline in Italy), all key arable and permanent crop groups showed growth in Europe and the European Union (Table 58).

Table 58: Europe and the European Union: Key crops/crop group 2018

	Crop group	Area (ha)		Organic share (%)		Change 2017-2018		Change 2009-2018	
		Europe	EU	Europe	EU	Europe	EU	Europe	EU
Arable crops	Cereals	2'639'748	2'179'519	2%	3.9%	9%	9%	52%	50%
	Dry pulses	504'474	442'829	8.2%	18.5%	16%	15%	207%	233%
	Green fodder	2'489'390	2'333'638	N/A	NA	5%	6%	79%	85%
	Oilseeds	496'099	307'725	1.4%	2.5%	23%	14%	224%	191%
	Root crops	55'913	42'425	0.6%	1.2%	8%	10%	44%	41%
	Vegetables	184'373	170'909	3.6%	7.2%	7%	8%	83%	81%
Permanent crops	Berries	41'115	37'588	13.5%	22.2%	1%	2%	108%	101%
	Citrus fruit	53'059	52'354	8.1%	10.2%	-4%	-4%	71%	73%
	Grapes	365'858	349'036	9.5%	11.1%	8%	8%	119%	125%
	Nuts	343'663	279'559	19%	26%	10%	6%	107%	93%
	Olives	603'019	516'918	10%	10%	2%	1%	66%	50%
	Temperate fruit	138'442	111'006	5.2%	8.5%	3%	9%	92%	93%
	(Sub)Tropical fruit	36'010	16'207	16.9%	11.4%	-6%	16%	135%	132%

Source: FiBL-AMI survey 2020 based on national data sources and Eurostat. Totals for arable and permanent crops include further crop groups
Note: For crop details by country, please check crop chapter in this book from page 92 and statistics.fibl.org

Arable crops

A large proportion of the organic arable land (7.5 million hectares in Europe and 6.1 million in the European Union) is used for the production of cereals and green fodder from arable land, which, together, account for about two-thirds of the organic arable land. Regarding the organic share, dry pulses are the most successful crop; in the European Union, they account for almost one-fifth of the total dry pulses area. In organic farming, they are important for crop rotation and animal feeding, whereas they have disappeared in conventional farming as protein crops for animal feed are imported, and crop rotation is replaced by fertiliser. Of the major groups, cereals and green fodder showed the highest increase in land area. Over the decade 2009-2018, the largest growth was noted for oilseed and dry pulses, which more than doubled. For more information about crop groups by country, see the crop chapters in this book (page 92) and our online database at statistics.fibl.org.

- **Cereals** were the largest crop group in Europe and accounted for 2.6 million hectares or 2 percent of the cereal area in Europe, and in the European Union, they were the second-largest group, accounting for 2.2 million hectares or 3.9 percent of the total cereal area. Wheat is the most important cereal (1 million hectares). The countries with the largest cereal areas are Italy (approx. 326´000 hectares, including large areas of durum wheat), France (approx. 311´000 hectares) and Germany (approx. 302´000 hectares). The highest organic shares of the total cereals area are in Austria (15.6 percent), Estonia (13.8 percent) and Sweden (11.4 percent). Outside the European Union, Turkey, Ukraine and the Russian Federation are major cereal producers.
- In the European Union, the arable crop group with the largest area was **plants harvested green** (green fodder from arable land) with 2.5 million hectares (Europe: 2.3 million hectares). Clover, green maize, and grass on arable land were the main crop types.
- In 2018, organic **vegetables**[1] were grown on almost 185’000 hectares of land in Europe, and more than 170’000 hectares in the European Union, covering 3.6 percent and 7.2 percent of the vegetable area, respectively. The largest areas were in Italy (60'732 hectares), France (26'363 hectares), and Spain (22'131 hectares). High organic shares of all vegetables are found in Luxembourg (54 percent), Denmark (34.6 percent), Iceland (30.5 percent) and Austria (25.4 percent).
- With 500’000 hectares in Europe and 440´000 hectares in the European Union, organic **dry pulses** accounted for a large share of all dry pulses (8.2 percent in Europe; 18.5 percent in the European Union). One reason is that the conventional crop area has been decreasing for many years due to the availability of cheap protein like soybeans on the world market for both animal feed and human consumption. The strong growth of dry pulses and their high organic shares also reflects the efforts of European organic farmers to improve soil fertility and to become less dependent on imports of protein crops. The countries with the largest areas of dry pulses were France (115’599 hectares), Italy (50’477 hectares), Germany (49’000) and Poland (42'328 hectares). The highest organic shares were found in Greece (63 percent), Austria (59 percent), and Denmark (58 percent).

Permanent crops

A large part of the permanent cropland (1.7 million hectares in Europe and 1.46 million hectares in the European Union) is used for olives, grapes, and nuts. Olives cover one-third of the permanent crop area, and grapes one fifth. Over the decade 2009-2018, the largest growth was noted for grapes, which more than tripled. In Europe, olives (0.52 million hectares) and grapes (0.35 million hectares) cover half of the permanent cropland (Table 58). Both reach an organic share of more than ten percent of their respective totals.

[1] It should be noted that for some countries, potatoes are included in the vegetable category.

The organic shares for most permanent crops were higher than those for the arable crops. However, it should be noted that the FAO data, with which the organic data are compared, do not include all berries or nut types grown in organic agriculture. Thus, a direct comparison is not possible in all cases. For more information about crop groups by country, see crop chapters in this book (page 92) and our online database at statistics.fibl.org.

- Spain and Italy had an organic **grape** area of more than 100’000 hectares each, and, together with France (12.6 percent) and Austria (12.2 percent), they had the highest organic shares of grapes (except some minor organic grape producers that reach even higher shares, such as the UK, Netherlands or Belgium). In Italy, 15.9 percent of the grape area is organic and 12.1 percent in Spain.
- For **olives**, Italy and Spain also have the lead (239'096 hectares and 200'129 hectares, respectively). France (30 percent) and Malta (26.5 percent) have the highest organic shares. The largest growth occurred in Spain, where the organic olive area increased by more than 5’000 hectares in 2018.
- Temperate fruits are grown on 138'442 hectares (European Union 111'006 hectares), and they cover 5.2 percent of the total temperate fruit area (8.5 percent in the European Union). Several countries in the European Union have a considerable amount of land dedicated to temperate fruit (e.g., apples in Poland and berries in the Baltic countries, both for processing rather than for the fresh market). The most important fruits were apples (57’298 hectares), plums (16’099 hectares), apricots (15’938 hectares) and cherries (15’870 hectares). The largest temperate fruit producers are Italy (27'326 hectares), France (21'388 hectares) and Turkey (20'609 hectares); the highest organic area shares are found in Latvia (33 percent).

3.3 Further organic areas

In addition to the agricultural land, there are further organic areas. Large parts of these are wild collection areas constituting 17.0 million hectares (European Union: 13.9 million hectares). The largest wild collection area in Europe (and in the world) is in Finland with 11.3 million hectares (mainly berries). For country details on wild collection areas, see Table 66.

4 Organic livestock

Statistics on the number of organic animals are incomplete and do not currently allow for a complete picture of the sector. However, taking into account all currently available information, the organic animal sector is developing at a fast pace in European countries. Table 59 provides an overview of European organic livestock in 2018. In many countries, organic animal husbandry began with beef, lamb, and milk production. In Europe, 4.85 million bovine animals, 5.9 million sheep, almost 1.4 million pigs, and 56.5 million poultry were kept (For European Union data, see Table 59).

Table 59: Europe and the European Union: Organic livestock 2018

	Europe				European Union	
	Animals [head]	Organic share of total [%]	Change 2017-2018 [%]	Change 2009-2018 [%]	Animals [head]	Organic share of total [%]
Bovine animals	4'853'724	3.8%	10.3%	88.1%	4'603'380	5.2%
Sheep	5'941'470	3.8%	14.5%	67.8%	5'685'771	5.0%
Pigs*	1'362'618	0.8%	36.4%	105.2%	1'321'170	0.7%
Poultry**	56'524'703	2.3%	12.7%	127.9%	53'615'279	3.3%

Source: FiBL survey 2020 based on Eurostat and national data sources.

Notes: *Data for the calculation of organic shares are based on Eurostat and FAOSTAT. The numbers for the organic shares of all livestock are based on FAOSTAT data. FAOSTAT only provides totals for bovine animals, sheep, pigs, and poultry, without further specifications. Please note that growth rates from 2008-2018 were similar for Europe and the European Union and are hence not included in the table.*
** Please note there is no consistent reporting in the official statistics, no clear distinction is made between the number of animals slaughtered, the places or average numbers of stock. Therefore, the data should be treated with caution.[1] According to the Agricultural Market Information Company AMI, the average stock of fattening pigs was 565'300 in Europe, and 528'700 in the European Union.*
*** Also for poultry, there is no consistent reporting. According to the Agricultural Market Information Company (AMI), the average stock of broilers was 11.8 million Europe, and 10.8 million in the European Union. The average stock of laying hens was 24.3 million in Europe and 22.4 million in the European Union.*

The organic share of all livestock remains small compared to some of the crop groups, depending on the animal species (between 0.7 percent and 5.2 percent (Table 59). Monogastric animals (pigs and poultry) account for the lowest shares, partly because of insufficient local supply of organic feed, the difficulties in the provision of traceable certified feed imports, the high investment in pig and poultry barns and pens, and the high price premiums consumers have to pay. The highest organic shares were for

[1] In the case of pigs and poultry, in the official statistics, no clear distinction is made between the number of animals slaughtered and the places or average numbers of stock over the year, and it is not always clear which of these is given when "livestock numbers" are quoted. Adding up the data for pigs and poultry over all countries, therefore, is not completely reliable and country data are not necessarily comparable. The data that are presented here should, therefore, be treated with caution and are only an approximation of the overall picture.

sheep and cattle as the conversion of these rather extensive production schemes is easier. At the same time, not all of this organic production is sold on the organic market at a premium price.

Between 2009 and 2018, the greatest increase was in poultry (128 percent), which can be partly attributed to the high demand for eggs (see the section on the organic market in Europe; Table 62). However, beef and dairy cattle also grew substantially in that decade (+88 percent), as did sheep (+69 percent) and pigs (+105 percent) (Table 59).

For bovine animals (4.85 million head in Europe), the largest numbers are found in Germany, France, and Austria (Table 67). The highest organic shares are in Latvia, Liechtenstein, Sweden, and Austria (all more than 20 percent). For sheep (5.9 million head in total), the largest numbers are in Greece, France and the United Kingdom. The highest organic shares are in the three Baltic countries[1] and the Czech Republic (all with more than 40 percent). Looking at the available data for pig stocks Denmark, Germany, Denmark and France have the highest numbers. For poultry, we assume that – like for pigs – country-level data is not comparable, due to different definitions (Table 67).

Organic cow's milk

Organic cow's milk production is one of the production-related indicators with good coverage across all European countries. Organic cow's milk has almost doubled since 2007 to meet rising demand for milk and dairy products. Production now stands at 5.4 million metric tons (European Union: 5.3 million), constituting 3.4 percent of the European Union's milk production from dairy cows in 2018 (Figure 81).

Europe and European Union: Development of organic cow's milk production, 2007-2018
Source: FiBL-AMI surveys 2009-2020

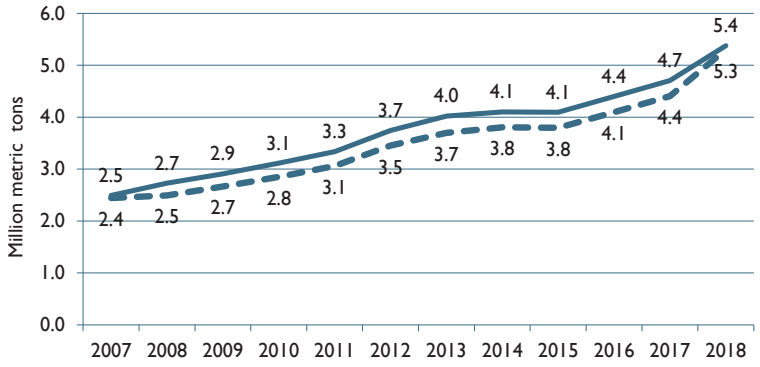


Figure 81: Europe and the European Union: Development of organic cow's milk production 2007-2018

Source: FiBL survey 2009-2020

5 Producers, processors, importers, and exporters

While data on organic producers are available for almost all countries, this is not the case for processors and importers and even less for exporters. Although data availability is improving, it is still not possible to draw a clear picture for the latter groups over the years. Hence, in the table below, a ten-year development is not shown for the number of exporters.

Table 60: Europe: Organic operators by country group 2018

	Europe			European Union		
	No.	Growth 1 year	Growth 10 years	No.	Growth 1 year	Growth 10 years
Producers	418'610	5.4%	64.3%	327'222	7.1%	56.1%
Processors	75'569	5.9%	99.3%	71'960	5.5%	94.3%
Importers	5'790	8.9%	105.2%	5'034	9.8%	84.5%
Exporters	3'334	14.4%	N/A	3'107	16.5%	

Source: FiBL-AMI survey 2020 based on national data sources and Eurostat. For a breakdown by country, see Table 68. For detailed data sources see annex.

5.1 Organic producers

In 2018, there were almost 419'000 organic producers in Europe and slightly more than 327'000 in the European Union (Table 60 and Table 68). In the European Union, the country with the largest number of producers was Italy (more than 69'000); in Europe, it was Turkey (more than 79'500) (Figure 84). Growth in the European Union (+7.1 percent), was stronger than in Europe as a whole (+5.4 percent), mainly due to a major increase in France and Greece. Over the decade 2009-2018, the number of producers in Europe increased by 64 percent (EU: +56 percent). Almost one-sixth of the world's organic farmers are in Europe (Figure 82).

5.2 Organic processors and importers

There were more than 75'500 organic processors in Europe (+5.9 percent compared to 2017) and almost 72'000 in the European Union (+5.5 percent). The country with the largest number of processors was Italy (20'087). Almost 5'800 importers (+ 8.9 percent growth) were counted in Europe and more than 5'000 in the European Union (+9.8 percent). Germany was the country, which had the most importers (1'723) (Table 60, Table 68, Figure 83).

Europe and European Union: Development of organic producers 2000-2018

Source: FiBL-AMI surveys 2006-2020 based on national data sources and Eurostat

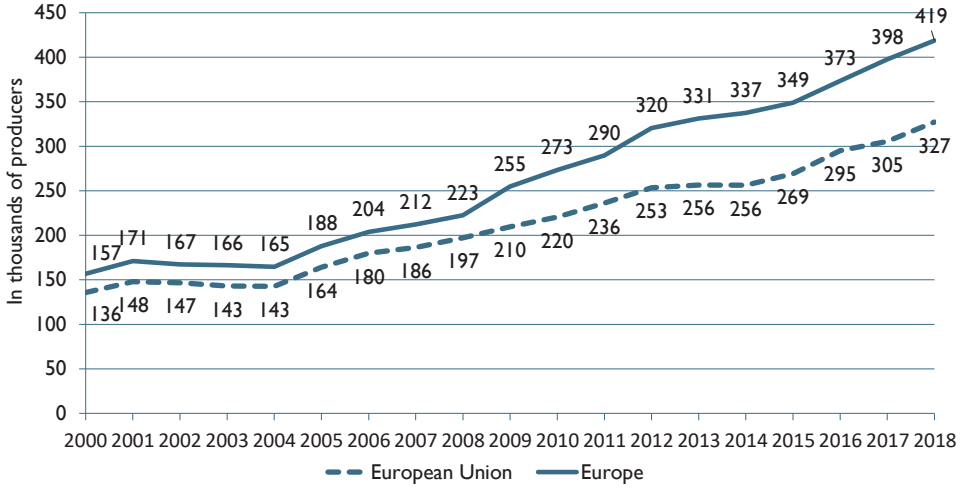
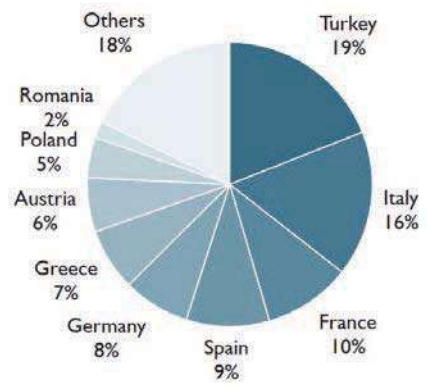


Figure 82: Europe and the European Union: Development of the number of organic producers in 2000-2018

Source: FiBL-AMI surveys 2006-2020 based on national data sources and Eurostat

Europe: Distribution of organic producers 2018

Source: FiBL-AMI survey 2020



Europe: Distribution of organic processors 2018

Source: FiBL-AMI survey 2020

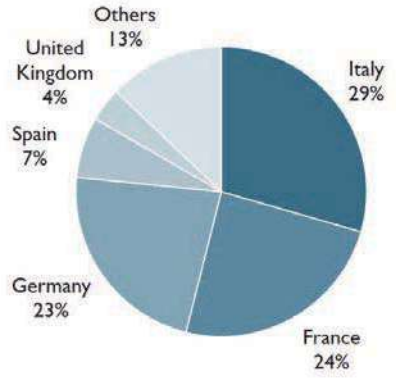


Figure 83: Europe: Distribution of organic producers and processors by country 2018

Source: FiBL-AMI survey 2020, based on national data sources and Eurostat.

Europe: Organic producers by country 2018

Source: FiBL-AMI survey 2020

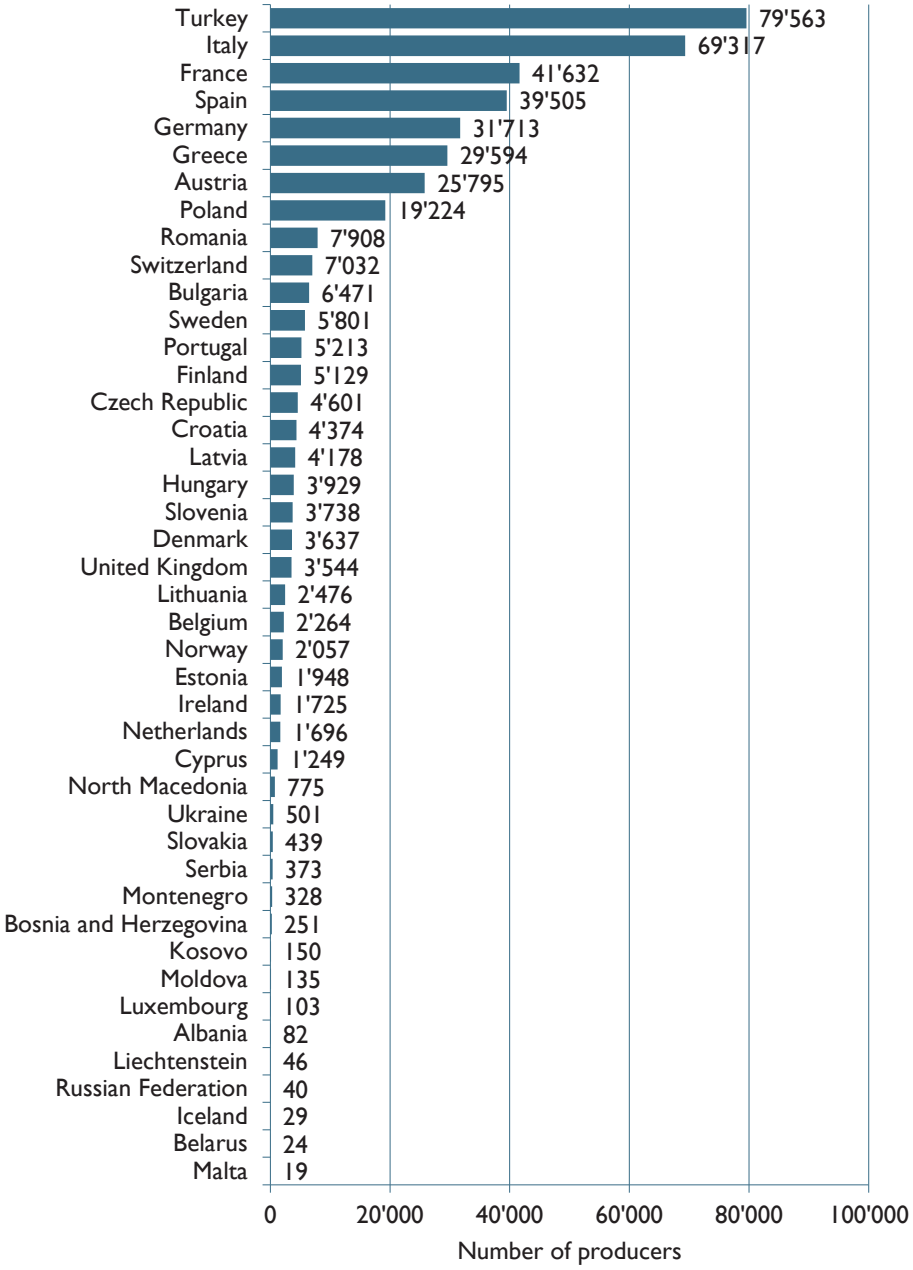


Figure 84: Europe: Number of organic producers by country 2018

Source: FiBL-AMI survey 2020 based on national data sources and Eurostat. For detailed data sources see annex.

6 Organic retail sales

In 2018, the organic market in Europe grew to 40.7 billion euros (European Union: 37.4 billion euros). Unfortunately, not all countries provide data on their domestic markets on a regular basis (Table 69), and it may be assumed that the market is larger than indicated by the figures in Table 61 and Table 69.

Table 61: Europe and the European Union: Organic retail sales 2018: Key data

	Retail sales [Million €]	Per capita consumption [€]	Growth 2017-2018 [%]	Growth 2009-2018 [%]
European Union	37'412	76.2	7.7%	121%
Europe	40'729	50.5	7.8%	125%

Source: FiBL-AMI survey 2020 based on national data sources. For country details, see Table 69.

6.1 Size of the organic market

Germany continues to be the largest market in Europe (10.9 billion euros) (Figure 86), and, after the United States, it is the second biggest organic market in the world. France holds second place in Europe with 9.1 billion euros. Comparing organic markets worldwide by single market, the United States has the lead: 42 percent of global retail sales of organic products are in the United States (40.6 billion euros), followed by the European Union (37.4 billion euros; 39 percent of organic global retail sales, Figure 85). Comparing retail sales by continent, North America is the largest market (43.7 billion euros).

Figure 85: Europe: Distribution of retail sales by country and by single market worldwide 2018

Source: FiBL-AMI survey 2020 based on national data sources

Europe: Organic retail sales value by country 2018
Source: FiBL-AMI survey 2020

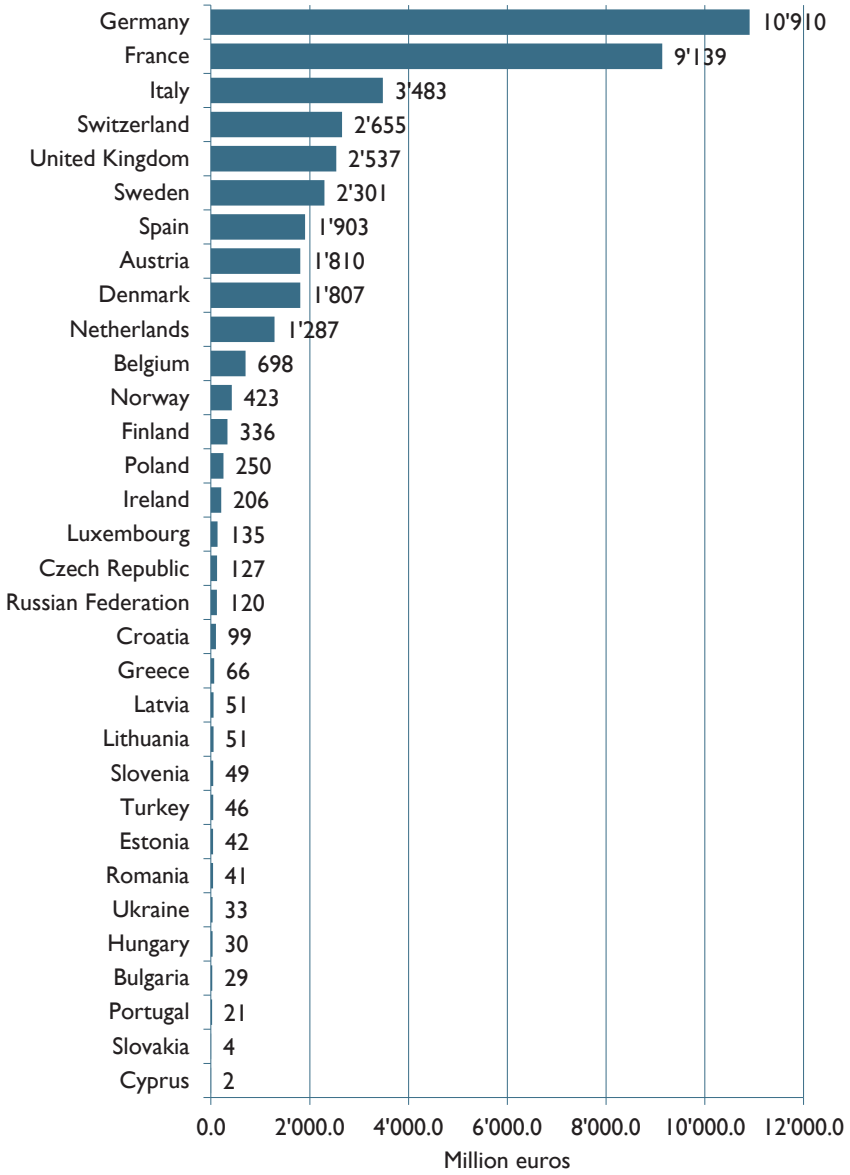


Figure 86: Europe: Retail sales by country 2018

Source: FiBL-AMI survey 2020 based on national data sources (only countries with a turnover of more than one million euros). Please note that 2018 data were not available for all countries. For detailed data sources see annex.

6.2 Growth of the organic market

The organic market grew in Europe by 7.8 percent (+7.7 percent in the European Union). In the decade 2009 to 2018, the organic market more than doubled in size (Figure 87).

All countries for which new data was available showed growth, some in the double-digits (Figure 88). With 15 percent, France showed the highest increase followed by Switzerland and Denmark (both 13 percent)(Figure 88, Table 69).

In the United Kingdom, where retail sales had been decreasing for several years, growth was noted for the seventh consecutive year (5.3 percent increase in 2018). It should be noted that UK sales in euros show a drop for the years 2015-2017, due to the exchange rate loss of the British pound after the Brexit vote.

In its agricultural outlook 2019 to 2030, the European Commission (2019b) expects increasing demand for organic food to boost EU supply in the short term. Over the medium term, challenges for conversion to organic farming, as well as further market shifts towards other environmentally-friendly alternatives, could, however, slow down the growth of organic production.

Europe and European Union: Development of retail sales 2000-2018

Source: FiBL-AMI Surveys 2006-2020, OrganicDataNetwork Surveys 2013-2015

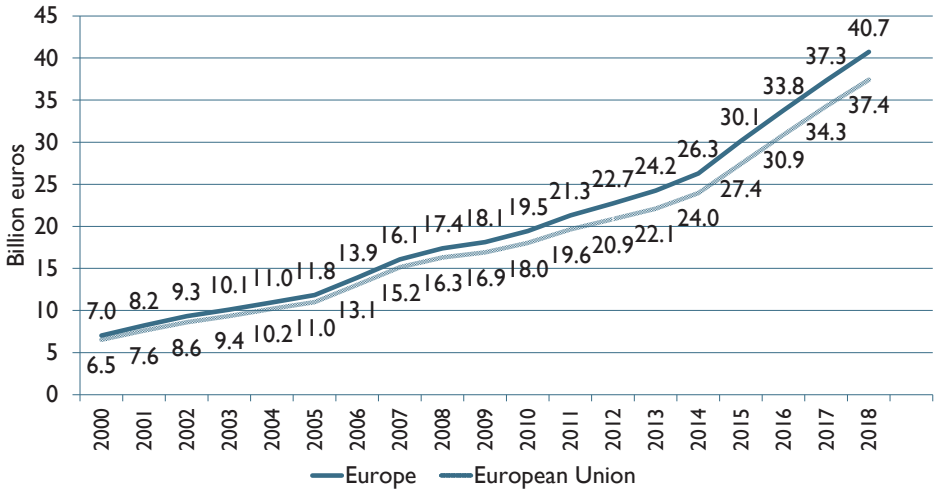


Figure 87: Europe: Growth of organic retail sales in Europe and the European Union, 2000-2018

Source: FiBL-AMI surveys 2004-2020, and OrganicDataNetwork Surveys 2013-2015

Europe: The countries with the highest growth of the organic market 2017-2018
Source: FiBL-AMI survey 2020

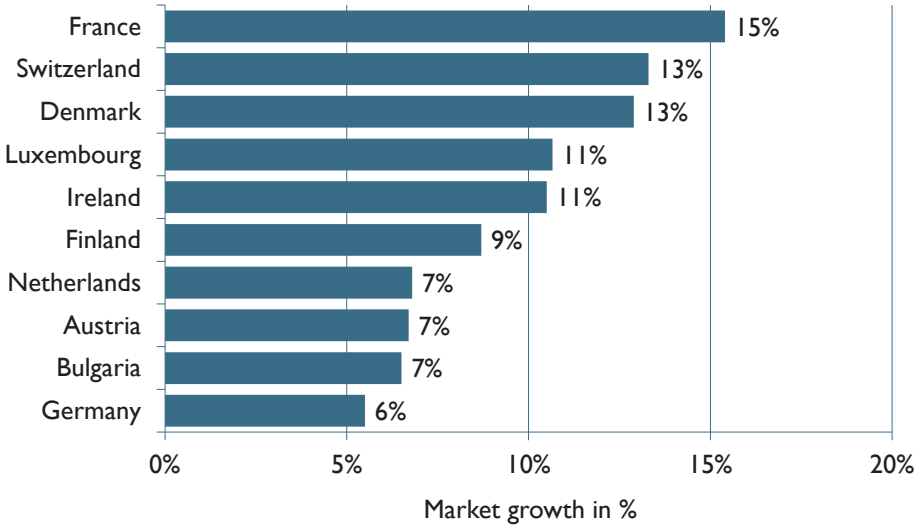


Figure 88: Europe: The countries with the highest organic market growth 2018

Source: FiBL-AMI surveys 2020. For detailed data sources see annex.

6.3 Per capita consumption of organic food

Like in the previous years, the highest per capita consumption of organic food was in Switzerland (312 euros) and Denmark (312 euros). Seven countries had a per capita consumption of more than 100 euros in 2017 (Figure 89, Table 69).

The continual growth in consumer interest is well documented by the growth of per capita consumption, with specific notable growth in 2018 (Figure 90). The per capita consumption in Europe rose to 51 euros and to 76 euros in the European Union.

In the Central Eastern European countries, consumer spending is still low (Table 69). There are indications that markets are currently developing fast, especially in the Baltic countries,[1] however, retail sales data are scarce for some countries and not regularly updated. Whereas the availability and accessibility of area and operator data is good, the Czech Republic is the only country with a permanent collection system for retail sales data.

[1] Estonia, Latvia and Lithuania.

Europe: The countries with the highest per capita consumption of organic food 2018

Source: FiBL-AMI survey 2020

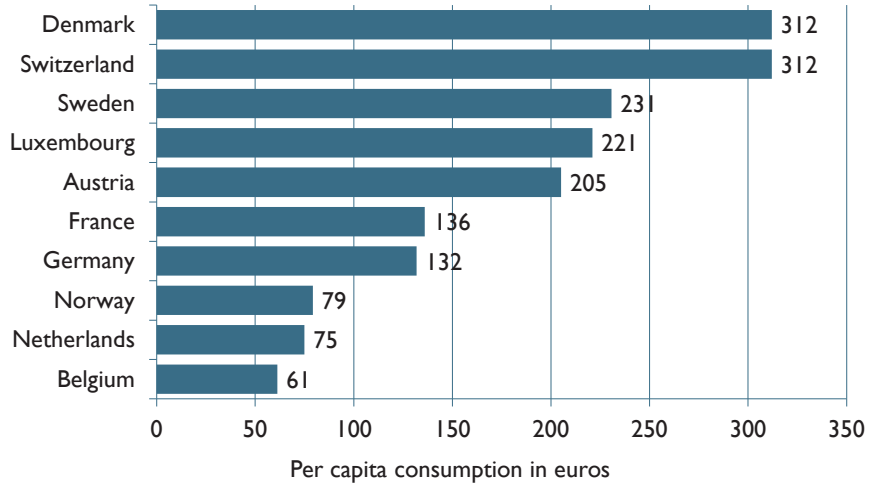


Figure 89: Europe: The countries with the highest per capita consumption 2018

Source: FiBL-AMI survey 2020 based on national data sources. For detailed data sources see annex.

Europe and European Union: Growth of the per capita consumption 2000-2018

Source: FiBL-AMI surveys 2006-2020, OrganicDataNetwork Surveys 2013-2015

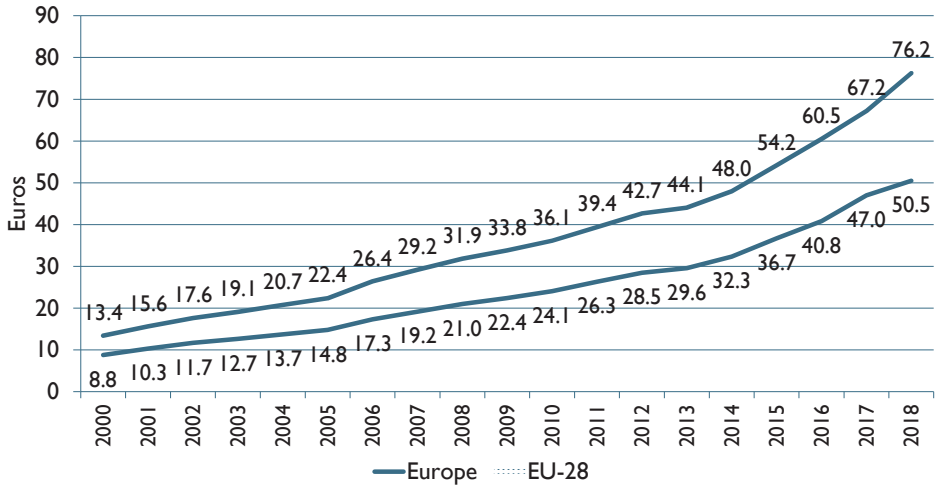


Figure 90: Europe: Growth of the per capita consumption 2000-2018

Source: FiBL-AMI survey 2020 based on national data sources. Calculation based on Eurostat population data. For detailed data sources see annex.

6.4 Organic market shares

The organic share of overall retail sales shows the importance that the organic market has in a given country. As in the past, the highest market shares were reached in Denmark (11.5 percent, highest organic market share in the world), Switzerland (9.9 percent) and Sweden (9.1 percent) (Figure 91, Table 69). The fact that, in many countries, the total food market is not growing and that, in many cases, food prices are decreasing makes organic shares grow even faster. Market shares of individual products and product groups can be far higher; these data are provided in Table 62. As there are no retail sales data for Europe or the European Union as a whole, it is not possible to calculate the overall organic market shares.

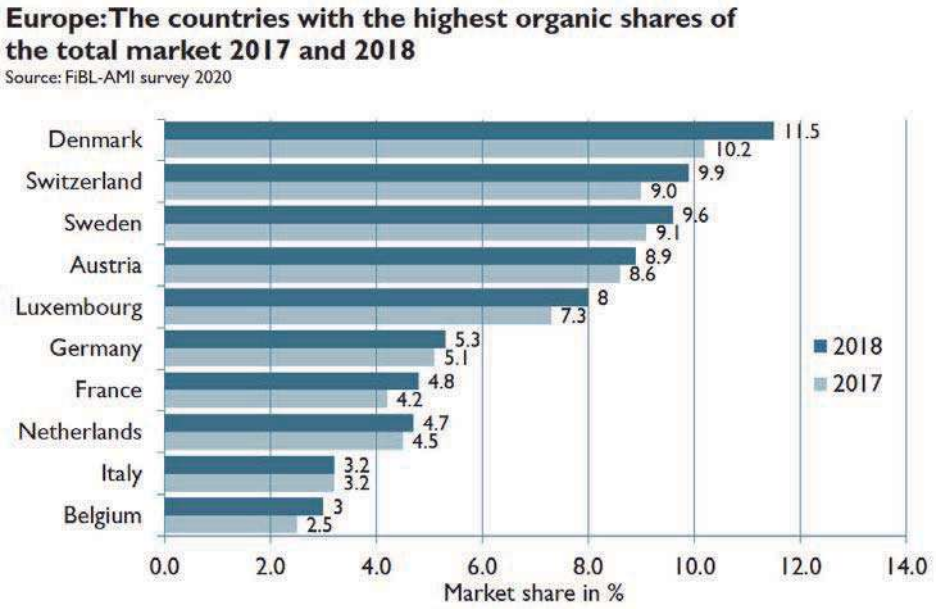


Figure 91: Europe: The countries with the highest shares of the total retail sales 2018

Source: FiBL-AMI survey 2020 based on national data sources. For detailed data sources see annex.
Notes: For Denmark, the 2017 figure was revised and is lower than what was communicated previously.

6.5 Comparison of organic products and product groups with the total market

While the organic share of the total market is an important indicator, it is also important to look at the organic market shares that individual products can have.

In many countries, organic eggs are one of the success stories within the total retail market, and they reach impressive proportions of the total egg market. Table 62 shows that, in Denmark and France, eggs reach organic market shares of approximately 30 percent (in value).

Table 62: Organic shares for retail sales values (euros) for selected products 2018

	Austria	Belgium	Czech Republic (2016)	Denmark (2017)	Finland	France (2017)	Germany	Netherlands	Norway	Spain (2017)	Sweden (2017)	Switzerland	UK
Baby food					20.0%	12.7%			33.1%				
Beverages			0.4%			5.0%			0.6%		5.6%	3.7%	
Bread & bakery products		2.4%	0.4%		6.3%	3.4%	8.6%	2.6%	1.9%		3.5%		0.3%
Eggs	22.3%	14.5%		32.6%	18.0%	29.6%	21.0%	15.9%	8.7%	2.9%		27.6%	6.9%
Fish and fish products		0.4%				2.5%		1.3%	0.8%	0.6%	12.9%		0.8%
Fresh vegetables	16.0%			1.3%		6.3%	9.7%		4.5%	3.3%	12.2%	25.4%	4.3%
Fruit	10.7%			18.8%		7.7%	7.8%		2.3%	1.7%	18.4%	16.2%	2.7%
Vegetables and fruit			1.3%		4.0%	6.9%		5.8%				18.9%	
Meat and meat products	4.4%		0.2%			2.4%	2.5%	4.7%	0.5%	1.2%	2.9%	6.1%	1.4%
Milk and dairy products			1.4%			4.4%		5.6%	2.0%	1.1%	10.4%		3.8%
- Butter	10.8%	4.7%		16.6%		5.6%	4.5%		3.1%				
- Cheese	10.2%			5.0%	2.0%	1.6%	4.7%		0.7%				1.1%
- Milk	23.2%	3.3%			4.0%	12.7%	12.1%		4.0%				5.9%
- Yoghurt	21.9%	8.5%			2.0%	6.9%	8.1%		0.7%				8.2%

Sources: FiBL-AMI survey 2020, based on data from Austria: RollAMA based on GfK, Belgium: LV based on GFK; Czech Republic: UZEI; Denmark: GfK ConsumerScan, provided by LF, Finland: Pro Luomu; France: Agence Bio (only supermarkets/general retailers). For baby food: Data from 2017, supermarket sales only; Germany: Agricultural Market Information Company AMI based on GfK; Netherlands: Bionext; Norway: Nielsen Norway; Sweden: Statistics Sweden (excludes alcoholic beverages); Switzerland: Bio Suisse based on Nielsen; UK: Soil Association. Note: Due to classifications and nomenclatures differing from country to country, it is not possible to supply data for all product groups, even if data for individual products may be available. Not all countries have data on the market shares of organic products. Please note that the products shown in the table above are a selection.

Organic fruit and vegetables continue to be highly popular purchases among European organic consumers. Organic vegetables have the highest market shares after eggs, representing 10 percent or more of the sales value of all vegetables sold in countries such as Switzerland, Austria, Denmark, and Sweden. For example, fresh carrots or fresh pumpkins alone have a nearly 30 percent market share in Germany. In Sweden and Switzerland, organic dairy products are reaching organic market shares of 10 percent or higher. In Denmark, organic milk has an organic market share of 30 percent. Individual products can reach even higher market shares. Organic oatmeal (over 52 percent in Denmark) or organic savoury bread spreads (59 percent in Germany) are good examples. On the other hand, products like organic beverages (except wine) and meat (especially poultry), have low market shares in many countries. These products are often highly processed and very cheap on the conventional market. Another factor is that many organic consumers tend to eat little or no meat.

6.6 Marketing channels in organic agriculture

Some countries are in a position to break down their retail sales data by marketing channel. Wherever possible, the figure for catering sales was deducted from the figure for the total organic market (Table 69). Figure 92 shows that the importance of the various retail marketing channels (excluding food service/catering) differs from country to country. In the past, countries with strong involvement by general retailers showed steady organic market growth (e.g., Austria, Denmark, Sweden, Switzerland, and the United Kingdom). France and Italy are good examples of countries with strong market growth, where specialized retailers play a very important role, even though their importance is decreasing as shown in Figure 93.

In Germany, supermarkets have become the driving force in the market, whereas specialised retailers are facing more and more competition. While in 2014, 33 percent of all organic products were sold in organic food shops, this number decreased to 27 percent in 2018.

Austria and Switzerland have once again developed very dynamically. In both countries, food retail chains have been heavily involved in organic market development from the very beginning - both countries have shares of approximately 80 percent. There is close cooperation between the retail chains and the respective organic associations, Bio Austria and Bio Suisse. The trade has helped to develop the trademarks. Coop and Migros in Switzerland have been promoting and developing projects for years, for example on biodiversity, seasonality and horn-bearing cows. In Austria, the Hofer discount store has developed its “Back to the Origin” (“Zurück zum Ursprung”) brand into the second most well-known organic brand in Austria within a few years, with 450 products to date. The Research Institute of Organic Agriculture (FiBL) evaluates the sustainability of the “Back to Origin” farmers on the basis of 58 criteria in four dimensions according to the international guidelines of the FAO (Food and Agriculture Organization of the United Nations).

Retail sales by channel in selected European countries 2018, based on retail sales value (million euros)
Source: FiBL-AMI survey 2020

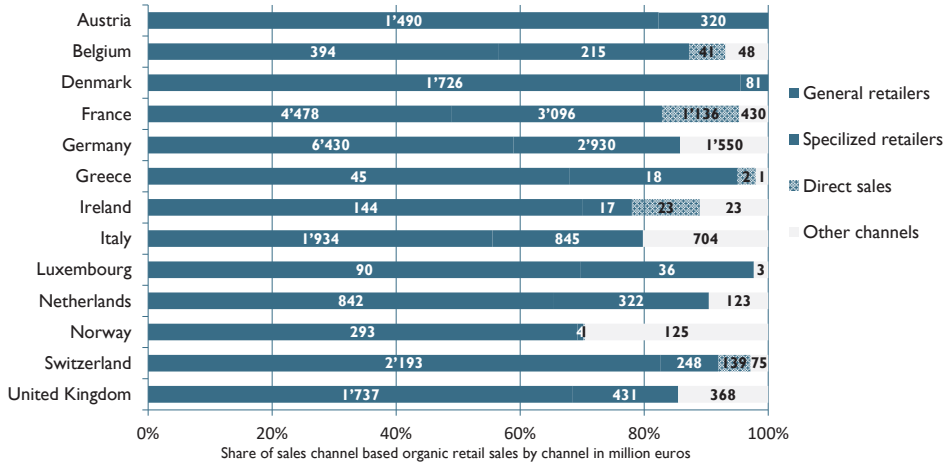


Figure 92: Europe: Marketing channels for organic products in selected countries 2018

Source: FiBL-AMI survey 2020 based on national data sources
For detailed data sources see annex.

Europe: Development of organic retail sales by channel for selected countries 2016-2018
Source: Austria: AMA Marketing, Denmark: Organic Denmark/LV, France: Agence Bio, Germany: Arbeitskreis Biomarkt, Italy: AssoBio/Nomisma, Switzerland: Bio Suisse

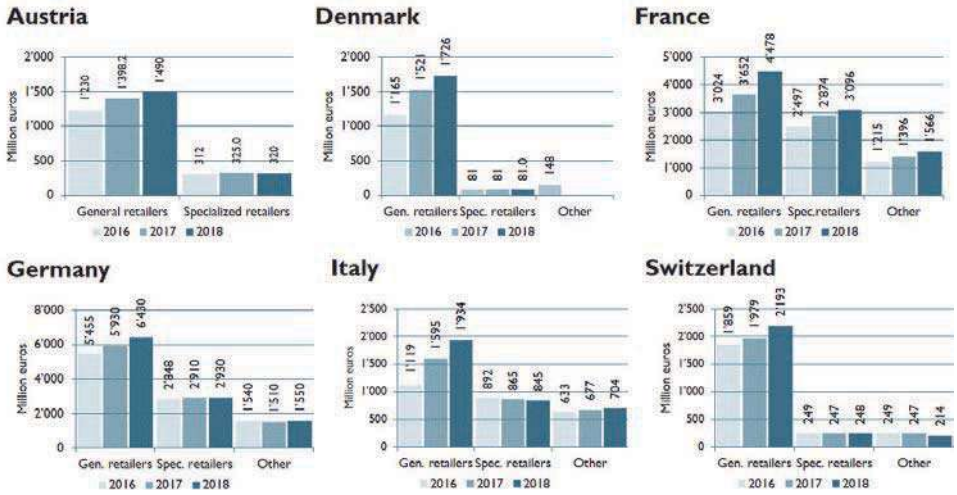


Figure 93: Europe: Growth of marketing channels for organic products 2016-2018 in selected countries

Source: Austria: AMA Marketing, Denmark: Organic Denmark/LV, France: Agence Bio, Germany: Arbeitskreis Biomarkt, Italy: AssoBio/Nomisma, Switzerland: Bio Suisse.

6.7 Organic imports

The European Union, which is the second-biggest organic market, provided data on its organic imports, showing, for the first time, the key import products and key importing countries (based on volume in metric tons). In 2018, the EU imported a total of 3.3 million tonnes of organic agri-food products. Imports of tropical fruit (fresh or dried), nuts and spices represented the single biggest category, totalling 793'597 tonnes or 24.4 percent of total imports, followed by oilcakes, cereals other than wheat, as well as rice, and wheat. China is the biggest supplier of organic agri-food products to the EU, with 415'243 tonnes of produce; that is 12.7 percent of the total organic import volume. For more information, see contribution by Panichi on page 142.

7 Outlook 2019-2030 from the European Commission

In a new publication on the agricultural outlook 2019-2030 (European Commission, 2019), further growth in organic demand is expected to boost supply, and demand for organic products is expected to continue to grow at a sustained rate until 2030.

However, the Commission states that addressing the demand for organic produce has proved to be challenging, as farmers need to implement very different production techniques characterized by a higher reliance on labour and stricter rules on animal welfare and medication. Higher production prices for organic products do not systematically offset production and conversion costs, which has resulted in production lagging behind demand in the EU. Despite these challenges, organic production has strongly increased over the past 10 years and high growth rates indicate that the organic market has not yet reached maturity.

The annual growth of production is expected to remain strong but will likely be lower over the second part of the outlook period (2019-2030), due to challenges for conversion. Market differentiation, such as zero pesticide labelling, could also weigh on the growth of the organic market. According to the Commission, the EU organic area could reach 18 million hectares by 2030, or 10 percent of the total agricultural land, representing a growth in land use of 3 percent per year. Slower development is expected for permanent pastures and permanent crops, where organic products has already reached significant shares. These areas are easier to convert to organic systems and were therefore able to mature at a quicker pace.

Production of organic arable crops is projected to keep increasing at a faster pace compared to pastures and permanent crops, given that production is strongly lagging behind demand, particularly for feed. This mainly includes cereals and oilseeds, but also sugar beet or pulses. For these crops, insufficient domestic supply is compensated by imports as demonstrated by the new organic EU import statistics (see article from Panichi, page 142). Despite significant production growth, reliance on imports could remain high as demand also increases, says the European Commission. Imports of organic products that are either not produced or produced in small quantities in the EU (e.g. coffee, tea, tropical fruits and nuts) are also expected to increase.

Facilitated by the increasing availability of organic feed, organic livestock is projected to grow significantly for pigs and poultry. Organic pig production, however, remains very challenging to implement (e.g. outdoor access) and is projected to remain limited to two percent of the total pig production by 2030. The share of organic poultry livestock (including laying hens) could double from the current 2.5 to 5 percent (Table 59). In comparison, the share of organic cattle, sheep and goats is already high but their growth is projected to slow down. The number of organic dairy cows is however expected to continue growing at a sustained pace, which could translate into a 7 percent share of organic dairy milk production, up from 3 percent in 2017. Growth in organic dairy is mainly driven by increasing organic cheese production, while lower growth is expected in the already well-established organic milk production (European Commission 2019).

8 Conclusion

Currently available data on organic farming in the global and European market show that, in an international context, the European organic sector is well developed. Relatively high shares of agricultural land, continual growth in the area and number of operators, as well as a fast-growing market, show the exceptional dynamics that the European organic market and sector has.

In the past years, in many countries, the organic market was growing faster than production, and domestic supply can still not meet demand. Therefore, many organic organisations or market actors are calling for more farmers to convert to organic – an the effects of these efforts are now visible with production growing at the same pace as the market. Now more processing facilities are needed in order to process larger amounts of raw products.

The European Commission's outlook 2019-2030 (2019) expects organic demand to boost supply, and demand for organic products is expected to continue to grow at a sustained rate until 2030. Despite challenges, organic production has strongly increased over the past ten years and high growth rates indicate that the organic market has not yet reached maturity.

Data availability and quality remains an issue. For instance, imports and exports play a very important role, but almost no relevant data exists. Denmark is the only European country that consistently supplies international trade data with a breakdown by country of origin/destination and product. A major development is therefore the new European import statistics showing which countries and products are the major exporting countries targeting the European Union. This is an important step towards making it possible to compare production data on organic agriculture worldwide with international trade data, which could give important hints on potential fraud cases.

Furthermore, while the availability of domestic market data is improving, it is collected with a wide range of methods and, strictly speaking, is not accurately comparable. Diverging methods and availability remain as challenges. For many

countries, particularly in Central and Eastern Europe, retail sales data are not collected on a continual basis, and thus, little is known about the importance of organic product sales. Therefore, we recommend that data availability and accessibility are increased, that classifications, nomenclature, and definitions, in particular for organic market data, are harmonized, and that data quality is improved.

9 Acknowledgements

The data compiled for this article builds on the collection activities of the OrganicDataNetwork project, which was funded by the European Union (EU) under its seventh framework programme for research, demonstration, and technological development, which ended in 2014.[1] The authors would like to thank all of those who have provided data and information for this report, in particular, the partners of the OrganicDataNetwork project.

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Note on data collection and countries covered

Data collection in Europe, like in the rest of the world, is carried out using multiple information sources. We would, however, like to point out that Eurostat, the statistical office of the European Union, is constantly expanding its data collection effort in the field of organic agriculture, and most of the data on organic areas, livestock, and operators was taken from Eurostat.

This articles focusses on organic farming and market statistics in Europe and includes:

- the 28 Member States of the European Union, which consist of the EU-13 countries, which became members of the European Union in or after May 2004, and the EU-15 countries, who were member countries of the European Union before the accession of ten candidate countries on May 1, 2004.
- The EU Candidate and Potential Candidate countries (CPC): Albania, Bosnia-Herzegovina, Kosovo, North Macedonia ; Montenegro, Serbia, Turkey),
- the members of the European Free Trade Association (EFTA): Iceland, Norway, Liechtenstein, Switzerland,
- as well as other European countries: Andorra, Belarus, Moldova, Russian Federation, San Marino and Ukraine.

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

Organic Agriculture in Europe: Tables

Table 63: Europe: Organic agricultural land by country 2018

Country	Organic area [ha]	Organic share [%]	Change 2017-18 [%]	Change 2009-18 [%]	Change 2017-18[ha]
Albania	747	0.1%	36.0%	175.5%	198
Andorra	2	0.0%	0.0%	0.0%	0
Austria	637'805	24.7%	2.7%	16.7%	17'041
Belarus	1'656	0.0%	23.7%		317
Belgium	89'025	6.8%	6.6%	114.7%	5'515
Bosnia & Herzegovina	896	0.0%	-29.6%	54.6%	-376
Bulgaria	162'332	3.5%	18.8%	1217.6%	25'703
Channel Islands	180	1.9%	0.0%	-51.4%	0
Croatia	103'166	6.6%	6.8%	626.8%	6'548
Cyprus	6'022	5.4%	7.2%	68.5%	407
Czech Republic	538'894	12.8%	3.6%	35.3%	18'861
Denmark	256'711	9.8%	13.4%	64.1%	30'404
Estonia	206'590	21.6%	5.2%	117.1%	10'149
Faroe Islands	251	8.4%	-0.8%	1992.9%	-2
Finland	297'442	13.0%	14.6%	79.0%	37'991
France	2'035'024	7.3%	16.7%	200.4%	290'604
Germany	1'521'314	9.1%	10.8%	60.6%	148'157
Greece	492'627	6.0%	20.1%	51.0%	82'487
Hungary	209'382	4.5%	4.9%	49.2%	9'698
Iceland	24'855	1.3%	23.2%	273.1%	4'679
Ireland	118'699	2.4%	59.7%	148.0%	44'363
Italy	1'958'045	15.8%	2.6%	76.9%	49'392
Kosovo	160	-	-		0
Latvia	280'383	15.4%	4.3%	75.0%	11'513
Liechtenstein	1'413	38.5%	1.7%	40.6%	24
Lithuania	239'691	8.3%	2.4%	85.7%	5'557
Luxembourg	5'782	4.4%	6.2%	60.0%	338
Malta	47	0.5%	8.9%	81.6%	4
Moldova	17'151	0.7%	-43.1%	-46.6%	-12'990
Montenegro	4'455	1.9%	64.1%	-3.2%	1'739
Netherlands	57'904	3.1%	3.0%	11.5%	1'701
North Macedonia	4'409	0.3%	52.0%	220.9%	1'509
Norway	46'377	4.7%	-1.4%	-18.3%	-665
Poland	484'676	3.4%	-2.1%	32.0%	-10'303
Portugal	213'118	5.9%	-16.0%	40.7%	-40'668
Romania	326'260	2.5%	26.2%	93.9%	67'789
Russian Federation	606'975	0.3%	26.5%	673.7%	127'146
Serbia	19'255	0.5%	43.4%	122.3%	5'831
Slovakia	188'986	10.0%	-0.1%	29.9%	-162
Slovenia	47'848	9.9%	3.5%	62.8%	1'626
Spain	2'246'475	9.6%	7.9%	68.8%	164'302
Sweden	608'758	19.9%	5.5%	55.5%	31'913
Switzerland	160'992	15.4%	6.3%	43.6%	9'588
Turkey	646'247	1.7%	24.1%	98.3%	125'361
Ukraine	309'100	0.7%	7.0%	14.4%	20'100
United Kingdom	457'377	2.7%	-8.1%	-36.6%	-40'365
Europe	**15'635'505**	**3.1%**	**8.7%**	**69.4%**	**1'253'025**
European Union	**13'790'384**	**7.7%**	**7.6%**	**65.5%**	**970'566**

Source: *FiBL-AMI survey 2020 based on Eurostat and national data sources. For data sources see annex. For information on data year, see page 310.*

Table 64: Europe: Conversion status of organic agricultural land 2018

Country	Area [ha]	Fully converted [ha]	Conversion area [ha]
Albania	747		
Andorra	2	2	
Austria	637'805		
Belarus	1'656		
Belgium	89'025	76'531	12'494
Bosnia and Herzegovina	896	547	350
Bulgaria	162'332	106'433	55'899
Channel Islands	180	180	
Croatia	103'166	57'252	45'914
Cyprus	6'022		
Czech Republic	538'894	472'798	47'235
Denmark	256'711	187'504	69'207
Estonia	206'590	214'067	25'624
Faroe Islands	251		
Finland	297'442	235'597	61'845
France	2'035'024	1'502'572	532'452
Germany	1'521'314		
Greece	492'627	316'753	175'874
Hungary	209'382	171'112	38'271
Iceland	24'855		
Ireland	118'699	71'327	47'372
Italy	1'958'045	1'490'852	467'192
Kosovo	160	160	
Latvia	280'383	249'910	30'473
Liechtenstein	1'413		
Lithuania	239'691	214'067	25'624
Luxembourg	5'782	5'127	654
Malta	47	37	10
Moldova	17'151	10'176	7'472
Montenegro	4'455	3'528	926
Netherlands	57'904	53'519	4'385
North Macedonia	4'409	994	1'168
Norway	46'377	41'686	4'691
Poland	484'676	363'565	121'112
Portugal	213'118	195'297	17'820
Romania	326'260	171'594	154'666
Russian Federation	606'975	490'560	57'307
Serbia	19'255	12'655	6'600
Slovakia	188'986	175'099	13'887
Slovenia	47'848	41'669	6'179
Spain	2'246'475	1'929'729	316'745
Sweden	608'758	495'488	81'357
Switzerland	160'992		
Turkey	646'247	475'864	170'386
Ukraine	309'100	233'500	75'600
United Kingdom	457'377	425'721	31'657
Europe	**15'635'505**	**10'493'471**	**2'708'447**
European Union	**13'790'384**	**9'223'619**	**2'383'948**

Source: *FiBL-AMI survey 2020 based on Eurostat and national data sources. For data sources see annex.*

Table 65: Europe: Land use in organic agriculture by country 2018

Country	Arable land crops [ha]	Permanent crops [ha]	Permanent grassland [ha]	Total [ha]
Albania	692	55		747
Andorra		2		2
Austria	239'874	10'787	385'639	637'805
Belarus	1'277	55		1'655
Belgium	31'300	1'078	56'647	89'025
Bosnia and Herzegovina	266	150		896
Bulgaria	65'648	29'478	33'713	162'332
Channel Islands				180
Croatia	50'281	12'614	39'575	103'166
Cyprus	2'955	2'964	103	6'022
Czech Republic	76'206	5'230	437'745	538'894
Denmark	209'915	1'810	44'986	256'711
Estonia	109'335	2'449	94'806	206'590
Faroe Islands	1	0	250	251
Finland	295'190	548	1'707	297'442
France	1'166'243	140'394	728'487	2'035'024
Germany	596'656	49'655	780'000	1'521'314
Greece	156'927	60'508	275'203	492'627
Hungary	74'086	10'937	116'389	209'382
Iceland	650	15'191	6'092	24'855
Ireland	4'433	65	114'201	118'699
Italy	946'691	471'342	540'012	1'958'045
Kosovo	160			160
Latvia	141'428	2'877	136'078	280'383
Liechtenstein	248	7	1'078	1'413
Lithuania	148'677	5'989	85'024	239'691
Luxembourg	2'648	190	2'944	5'782
Malta	29	17		47
Moldova	14'377	2'509		17'151
Montenegro	302	457	3'696	4'455
Netherlands	25'280	728	31'896	57'904
North Macedonia	3'804	605	0	4'409
Norway	37'296	330	8'751	46'377
Poland	354'793	30'220	99'663	484'676
Portugal	42'888	46'075	124'176	213'118
Romania	240'800	18'569	66'890	326'260
Russian Federation	570'562	41	5'197	606'975
Serbia	7'748	5'975	5'531	19'254
Slovakia	63'662	1'704	123'622	188'986
Slovenia	6'270	2'878	38'700	47'848
Spain	487'363	572'207	1'186'905	2'246'474
Sweden	472'926	622	135'210	608'758
Switzerland	36'039	2'170	120'265	160'992
Turkey	420'705	209'478	16'071	646'247
Ukraine	235'290	5'000	34'680	309'100
United Kingdom	119'093	4'158	330'252	457'377
Europe	**7'461'013**	**1'728'119**	**6'212'185**	**15'635'505**
European Union	**6'131'596**	**1'486'093**	**6'010'573**	**13'790'382**

Source: FiBL-AMI survey 2020 based on Eurostat and national data sources. For data sources see annex. Total includes other agricultural areas for which no land use details were available.

Table 66: Europe: Organic agricultural land and wild collection areas by country 2018

Country	Agricultural land [ha]	Wild collection [ha]	Total [ha]
Albania	747	613'893	614'640
Andorra	2		2
Austria	637'805	1	639'250
Belarus	1'655	577'019	578'674
Belgium	89'025	3	89'028
Bosnia and Herzegovina	896	165'534	166'430
Bulgaria	162'332	307'020	469'352
Channel Islands	180		180
Croatia	103'166		103'166
Cyprus	6'022		6'022
Czech Republic	538'894		538'894
Denmark	256'711	2'648	259'359
Estonia	206'590	174'034	380'624
Faroe Islands	251		251
Finland	297'442	11'263'583	11'561'025
France	2'035'024		2'035'024
Germany	1'521'314		1'521'314
Greece	492'627	317'053	809'680
Hungary	209'382		209'382
Iceland	24'855	200'032	224'887
Ireland	118'699		118'699
Italy	1'958'045		1'958'045
Kosovo	160	179'580	179'740
Latvia	280'383		280'383
Liechtenstein	1'413		1'413
Lithuania	239'691		239'691
Luxembourg	5'782		5'782
Malta	47		47
Moldova	17'151	377	17'528
Montenegro	4'455	143'410	147'864
Netherlands	57'904		57'904
North Macedonia	4'409	556'600	561'009
Norway	46'377		46'377
Poland	484'676		484'676
Portugal	213'118	40'000	272'651
Romania	326'260	1'787'548	2'113'808
Russian Federation	606'975	133'838	740'813
Serbia	19'254		19'254
Slovakia	188'986		188'986
Slovenia	47'848	13'238	61'086
Spain	2'246'474	38'184	2'284'659
Sweden	608'758		608'758
Switzerland	160'992		160'992
Turkey	646'247	163'224	809'471
Ukraine	309'100	570'000	879'100
United Kingdom	457'377		457'377
Europe	**15'635'505**	**17'246'818**	**32'903'297**
European Union	**13'790'382**	**13'943'312**	**27'754'671**

Source: FiBL-AMI survey 2020 based on Eurostat and national data sources. For data sources see annex.

Table 67: Europe: Organic livestock by country 2018

	Bovine animals		Pigs		Poultry		Sheep	
	No	Share (%)	No	Share (%)	No	Share (%)	No	Share (%)
Austria	421'324	21.3%	41'912	1.4%	2'594'068	15.3%	123'495	34.2%
Belgium	106'049	4.3%	17'399	0.3%	3'305'154	9.2%	24'670	20.7%
Bulgaria	6'950	1.2%	126	0.0%	6'950	0.0%	23'636	1.6%
Croatia	19'613	4.3%	1'887	0.2%	1'870	0.0%	62'315	9.2%
Cyprus	469	0.8%		0.0%	24'330	0.8%	879	0.3%
Czech Republic	262'061	19.4%	2'867	0.2%	50'334	0.2%	94'089	42.6%
Denmark	220'754	13.7%	488'886*	4.0%	3'506'802	23.9%	11'292	7.3%
Estonia	41'499	16.9%	458	0.1%	36'212	1.7%	32'901	42.8%
Faroe Islands				-	11	-	169	0.2%
Finland	72'082	7.9%	4'857	0.4%	312'202	4.9%	31'985	24.6%
France	751'382	4.0%	317'925**	2.3%	20'181'495***	9.4%	1'132'809	15.2%
Germany	771'320	15.8%	178'200	0.9%	9'826'000	7.5%	158'000	12.1%
Greece	138'015	20.1%	4'746	0.4%	252'280	0.7%	1'299'677	13.6%
Hungary	18'964	2.7%	4'459	0.1%	83'538	0.2%	5'538	0.5%
Iceland	236	0.3%		0.0%	12'413	3.9%	1'226	0.3%
Ireland	61'819	0.9%	642	0.0%	161'816	1.0%	83'302	1.6%
Italy	375'414	6.0%	59'623	0.6%	3'482'435	2.1%	680'369	8.6%
Latvia	96'423	25.3%	1'845	0.5%	37'417	0.8%	39'407	49.3%
Liechtenstein	1'525	24.3%%	71	4.1%	1'787	-	1'252	33.0%
Lithuania	57'884	7.7%	142	0.0%	16'719	0.2%	24'158	40.0%
Luxembourg	4'956	2.6%	895	1.0%	32'528	28.8%	539	6.6%
Moldova	320	0.2%		0.0%		0.0%	1'115	0.2%
Montenegro	420	0.5%		0.0%	170	0.0%	1'545	0.7%
Netherlands	71'715	1.8%	93'210	0.8%	3'306'422	3.4%	12'815	1.2%
N. Macedonia	6'390	2.5%		0.0%		0.0%	101'317	13.8%
Norway	30'307	3.5%	2'924	0.3%	592'267	12.7%	46'823	2.1%
Poland	26'953	0.5%	3'221	0.0%	349'697	0.3%	16'243	6.1%
Portugal	93'191	6.2%	2'896	0.1%	57'548	0.1%	96'620	4.6%
Romania	16'890	0.8%	9	0.0%	61'520	0.1%	32'579	0.4%
Russian Fed.	1'874	0.0%		0.0%		0.0%	1'332	0.0%
Serbia	3'594	0.4%	284	0.0%	6'735	0.0%	5'138	0.3%
Slovakia	63'340	13.7%	547	0.1%	9'386	0.1%	84'912	21.6%
Slovenia	35'751	7.7%	3'203	0.9%	93'145	4.1%	35'071	29.2%
Spain	212'066	3.6%	20'196	0.1%	1'030'745	0.7%	622'958	3.8%
Sweden	332'294	22.1%	33'579	2.5%	1'411'540	16.8%	128'914	21.1%
Switzerland	200'450	6.5%	38'169	1.3%	1'053'871	4.6%	84'765	12.4%
Turkey	5'113	0.0%	0	0.0%	1'242'170	0.5%	10'475	0.0%
United Kingdom	324'202	3.3%	37'440	0.8%	3'383'126	2.2%	826'598	2.6%
Europe	**4'852'199**	**3.8%**	**1'362'547**	**0.8%**	**56'522'916**	**2.3%**	**5'940'218**	**3.8%**
European Union	**4'603'380**	**5.7%**	**1'321'170**	**0.9%**	**53'615'279**	**3.8%**	**5'685'771**	**5.8%**

Source: FiBL survey 2020 based on Eurostat and national data sources. For data sources see annex.
**Pigs Denmark: The number in the table includes animals slaugthered; the average stock is 212'000 according to AMI*
***Pigs France: The number in the table includes animals slaugthered; the average stock is 145'000 according to AMI*
****Poultry France: Numbers based on animals slaughtered. AMI estimated the average stock to be around 10.5 million heads.*

Note: In the case of pigs and poultry, in the official statistics, no clear distinction is made between the number of animals slaughtered and the places or average numbers of stock over the years, and it is not always clear which of these is given when "livestock numbers" are quoted. Adding up the data for pigs and poultry over all countries, therefore, is not completely reliable and country data are not necessarily comparable. The data that are presented here should, therefore, be treated with caution and are only an approximation of the overall picture.

Table 68: Europe: Organic producers, processors, and importers by country 2018

For information on data year, see page 310.

Country	Producers	Processors	Importers	Exporters
Albania	82	58	4	30
Andorra	1	4		
Austria	25'795	1'651	62	4
Belarus	24	24		7
Belgium	2'264	1'403	279	107
Bosnia and Herzegovina	251	23		20
Bulgaria	6'471	181	29	6
Croatia	4'374	368	14	3
Cyprus	1'249	57	19	1
Czech Republic	4'601	822	303	165
Denmark	3'637	1'018	78	80
Estonia	1'948	171	33	16
Faroe Islands	1	1		
Finland	5'129	301	63	20
France	41'632	16'651	545	
Germany	31'713	15'441	1'723	1'208
Greece	29'594	1'542	33	47
Hungary	3'929	515	42	
Iceland	29	26	3	
Ireland	1'725	26	24	2
Italy	69'317	20'087	472	962
Kosovo	150	35		8
Latvia	4'178	51	10	0
Liechtenstein	46			
Lithuania	2'476	81	11	
Luxembourg	103	94	8	
Malta	19	5	14	
Moldova	135	14	2	31
Montenegro	328	5		
Netherlands	1'696	995	385	87
North Macedonia	775	20	4	5
Norway	2'057	457	93	
Poland	19'224	533	208	249
Portugal	5'213	788	33	23
Romania	7'908	161	9	6
Russian Federation	40	26		8
San Marino		2		
Serbia	373	123	51	3
Slovakia	439	85	22	1
Slovenia	3'738	409	24	
Spain	39'505	4'627	320	109
Sweden	5'801	1'328	89	10
Switzerland	7'032	1'289	548	18
Turkey	79'563	1'501	51	97
Ukraine	501			
United Kingdom	3'544	2'569	182	1
Europe	**418'610**	**75'569**	**5'790**	**3'334**
European Union	**327'222**	**71'960**	**5'034**	**3'107**

Source: FiBL-AMI survey 2020 based on Eurostat and national data sources. For data sources see annex.
**Total number includes data for countries with less than three operators.*

Table 69: Europe: The organic food market 2018

Country	Data year	Retail sales [Million €]	€/person [€]	Organic share [%]	One year growth [%]	Food service [Million €]	Exports [Million €]
Austria	2011						80
	2018	1'810	205	8.9	6.7	120	
Belgium	2017				5.0		
	2018	698	61	3.0			
Bosnia and Herzegovina	2017	0.4	0.1				
	2018						6
Bulgaria	2017	29	4		6.5		
Croatia	2011						3
	2018	99	24	2.2			
Cyprus	2006	2	2				
Czech Republic	2016						61
	2017	127	12	1.2		4	
Denmark	2018	1'807	312	11.5	12.9	316	390
Estonia	2017	42	32	2.7		10	27
Finland	2018	336		2.4	8.7		28
France	2017						707
	2018	9'139	136	4.8	15.4	555	
Germany	2009					300	
	2018	10'910	132	5.3	5.5		
Greece	2017	66	6				
Hungary	2009						20
	2015	30	3				
Ireland	2011			0.7			
	2017	206	43		10.5		
Italy	2017			3.2			
	2018	3'483	58		5.3	606	2'266
Kosovo	2015						6
Latvia	2017	51	6	1.5			51
Lithuania	2017	51	18	1.0		5	45
Luxembourg	2018	135	221	8.0	10.7	6	
Netherlands	2016						1'200
	2018	1'287	75	4.7	6.8	351	
Norway	2016			1.7			
	2018	423	79		3.9	27	
Poland	2018	250	7				
Portugal	2011	21	2	0.2			
Romania	2011						200
	2016	41	2				
Russian Federation	2009						4
	2018	160	1				
Serbia	2016						19
Slovakia	2010	4	1	0.2			
Slovenia	2009					0	0
	2013	49	27	1.8			
Spain	2016						891
	2017	1'903	42	2.8		59	
Sweden	2018	2'301	231	9.6	4.0	507	117
Switzerland	2018	2'655	312	9.9	13.3		
Turkey	2014	46	1				
	2017						182
Ukraine	2018	33	1				104
United Kingdom	2016						194
	2018	2'537	38		5.3	103	
Europe		**40'729**	**50**				
European Union		**37'412**	**76**				

Source: FiBL-AMI survey 2020. For details on data sources see annex.

Note on table: Where no published data exists, best estimates from experts have been used, but new data were not available for all countries. Therefore, in some cases earlier estimates are shown. Values published in national currencies were converted to euros using the 2018 average annual exchange rates according to the Central European bank. Please note that due to fluctuating exchange rates it is not possible to make a year-to-year comparison for countries that do not have the Euro as their currency.

Latin America and the Caribbean

Map 5: Organic agricultural land in the countries of Latin America and the Caribbean 2018 (in hectares)

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315.

Latin America

PATRICIA FLORES[1]

Latin America is a vast region of more than 22 million square kilometres and 626 million people. The region is characterised by a high biological and cultural diversity, with indigenous people and ancient cultures that keep their knowledge, wisdom and traditions alive. Most of the organic production in the region is generated by smallholders, peasants, and indigenous people.

This year, the chapter focusses on Mexico and its "fourth transformation" as well as on recent developments in Brazil, Chile and Peru.

Mexico and the "fourth transformation" based on agroecology

In December 2018, Andres Manuel López Obrador took office as President of the United Mexican States. The Mexican President's keen sense of his country's history has found expression in his promise to inaugurate the country's "fourth transformation". The phrase is a reference to the march of Mexican politics towards social democracy. The three other transformations were: independence in 1810, the liberal reforms of the 1850s, and the Mexican revolution in the early 1900s.

For the Mexican government, one pillar of the so-called "fourth transformation" is agroecology. The process is led by SEMARNAT, the Secretariat of Environment and Natural Resources (Mexico's environment ministry).[2] The objective of the National Agroecology Plan is "to establish agroecology as a guiding principle in environmental policies for the design of means and management instruments that will improve living conditions of people, conservation of agroecosystems, sustainable use of biodiversity, and sustainable management of the territory moving towards food security." The plan encompasses production (agriculture, livestock and fishing), distribution, processing and consumption (SEMARNAT 2019).

It is inspired by and based on five components (SEMARNAT 2019):

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[1] Patricia Flores, IFOAM Latin America Office Coordinator, Lima, Peru

[2] The driving force of the environmental policy in Mexico is the defence of the human right for a healthy and dignified environment, based on two pillars: a) quality scientific and technical information; and b) environmental policy addressing citizens.
To this end, the following strategic lines are proposed:

- Agro-ecological transition: Healthy production of healthy food
- Energy transition to renewable energies
- Recovery of rivers and water bodies
- Water for all (general water law), democratisation of water use
- Conservation efforts taking into account social and cultural aspects: 70 million hectares are under conservation management, but 80 percent of the communities that inhabit these areas live in very marginal conditions as the conservation policy has forgotten social and cultural aspects.
- Environmental education and culture.

- Research, science and technology centres with a total of twelve academic institutions;
- Farmer field schools - "Escuelas Campesinas" -, which are acknowledged as a movement;
- Tianguis[1] and organic markets, of which around 80 exist, connecting agroecology with social and solidarity-based economy;
- Responsible consumers;
- Community and regional social and economic organisations based on the community experiences of, for example:
- *Milperos,* which promotes maize and organises fairs, of which about 120 exist across the country;
- Coffee growers as the backbone of agroecology, organised into cooperatives;
- Honey producers, especially with meliponiculture[2] in the Yucatan peninsula, who are active against GM soybeans;

In Mexico, agroecology in the 4th transformation process focuses on food. The Alliance for Food Health[3], which is comprised of 32 organisations, advocates for the right to food based on agroecological and sustainability principles. This alliance plays a role in consulting processes to build public policies and national communication strategies for a better food system to combat all forms of malnutrition (SDG 2).

SEMARNAT, the Secretariat of Environment and Natural Resources, leads a multi-sectoral group on health, food and environment. The group works towards agroecology, with the theme "food" at the core of its work. It is developing a "Special Program for a Fair, Healthy and Sustainable Agricultural and Food System 2020-2024".

Participants in the programme include SADER, the Secretariat of Agriculture and Rural Development (Mexico's agriculture ministry), to create a "Program for the Agroecological Transition" which focuses on food self-sufficiency. Agreements are foreseen with research and education centres specialising in agroecology so that they can participate in the different processes.

Chile and Brazil: Memorandum of Understanding on Organic Products

In April 2019, the implementation of the Memorandum of Understanding on Organic Products between Chile and Brazil was announced. This memorandum will promote trade in organic products in both countries through the mutual recognition of their certification and control systems. The initiative was long awaited by exporters and importers of organic products. The negotiations were carried out between the Chilean

[1] A tianguis is an open-air market or bazaar that is traditionally held on certain market days in a town or city neighbourhood in Mexico and Central America. More information is available at Wikipedia on https://en.wikipedia.org/wiki/Tianguis

[2] Meliponines are stingless bees, sometimes called stingless honeybees, and are a large group of bees (about 500 species). More information is available on Wikipedia at https://en.wikipedia.org/wiki/Stingless_bee.

[3] More information is available at www.alianzasalud.org.mx

Ministry of Agriculture through the Agricultural and Livestock Service (SAGI) and the Coordination of Agroecology and Organic Production of the Ministry of Agriculture, Livestock and Supply of Brazil (COAGRE-MAPA).

Brazil is a big organic market in the region. Brazilian consumers are interested in agroecological production, and this memorandum is an excellent business opportunity for both countries as they can now complement the food supply of high-quality organic products for local consumers.

This agreement is the first in the world to recognise, without restrictions, the modalities of organic certification for both countries: third party certification, where a company certifies the organic operation according to current standards, and Participatory Guarantee Systems, which are considered first-party certification in Chile as they are carried out by producers' organisations complying with the regulatory requirements of organic certification.

Accordingly, fresh and processed vegetable products, which are certified under the scope of this agreement, may be exported and marketed in both Chile and Brazil. The products must carry the Chilean or the Brazilian organic seal specifying if a product was certified by a certifying company or a participatory guarantee system.

Figure 94: Brazilian organic seals for products certified under participatory guarantee systems (left) or by a certification company/third party certification (right)

Chile and Switzerland

The Swiss Federal Office of Agriculture (FOAG) and the Chilean Agricultural and Livestock Service (SAG) have agreed on the mutual recognition of the standards they apply to organic products. The equivalence agreement that seals this mutual recognition came into force in August 2019 and will facilitate trade in organic products between the two countries.

The agreement negotiated between Switzerland and Chile implies the mutual recognition of equivalence of organic production requirements and control systems used in this area. This agreement means that organic food produced in Switzerland can be sold in Chile without having to undergo new controls. The same will apply to Chilean organic products in Switzerland.

The equivalence agreement applies to organic products produced or manufactured, processed or packaged in Switzerland or Chile. Organic products of animal origin from Chile, except those from beekeeping (e.g. honey), are excluded from the agreement. The equivalence agreement between Chile and Switzerland will facilitate

trade in organic products, thus contributing to the development of the organic sector in Switzerland and Chile.

Peru: International Food Education Forum

For some years now, the issue of food and food systems has been at the centre of policy and strategy discussions at the national, regional and local levels. Peru is recognised for its varied and nutritious gastronomy, based on indigenous foods prepared with traditional recipes with a great deal of innovation. On the other hand, the Peruvian population suffers the consequences of malnutrition, due to lack of access and consumption of food in sufficient quantity and quality. Obesity, undernutrition and anaemia impede the development of human potential, especially the most vulnerable. In Peru, half of the adult population is overweight, one in three children between the ages of five and nine is obese, and almost half of the children under five suffer from anaemia.

Against this backdrop, the first edition of the International Food Education Forum was held in November 2019 to promote healthy eating and nutritional education. It shared the best and most successful experiences in the world. More than 1,600 participants and several guest countries (Japan, Argentina, USA, Brazil, Ecuador, Colombia) attended the event. Key stakeholders of international and government organisations included representatives of the Partnership for Healthy Cities, FAO's regional coordinator of the School Meal Programs and acknowledged chefs like Gastón Acurio.

Peru's enforcement of Law No. 30021 (Law for Promotion of Healthy Eating) establishes this forum as a platform to promote healthy eating in schools across the country. It aims to promote education policies on healthy food and a national nutrition education program in schools. Organic and agroecologically-produced food is highlighted this way and put forward in the first priorities to launch such public policies.

The Agroecological Consortium, including its organic stakeholders, is part of this national effort that brings fresh air and new input to build healthier, just and ecologically-sound food systems.

A new edition of the forum is expected to be launched in the following year. More information is available at www.educaalimentaria.com.

Reference

SEMARNAT - Secretaría de Medio Ambiente y Recursos Naturales (2019) Presenta Toledo Manzur los lineamientos de la política ambiental del Gobierno de México. Comunicado de Prensa Núm. 85/19 Ciudad de México, a 05 de junio de 2019-. Available at the website of Gobierno de México/Government of Mexico. Available at https://www.gob.mx/semarnat/prensa/presenta-toledo-manzur-los-lineamientos-de-la-politica-ambiental-del-gobierno-de-mexico-203226

Latin America and the Caribbean: Current statistics

JAN TRÁVNÍČEK[1], BERNHARD SCHLATTER[2], JULIA LERNOUD[3] AND HELGA WILLER[4]

Overview

In 2018, 8 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. More than sixteen percent of the world's organic agricultural land is in Latin America and the Caribbean. More than 13'000 hectares more were reported than in 2017. The organic area has doubled since 2000 (over 4 million hectares). The country with the largest organic agricultural area was Argentina with 3.6 million hectares (Figure 95), and the country with the largest number of producers is Peru with more than 103'000 (Table 70). The highest proportion of the total agricultural area being organic was reached in Uruguay with 14.9 percent, followed by French Guiana with 10.1 percent.

Land use

Land use details were available for 87 percent of the organic agricultural land. In 2018, only 4 percent of all organic farmland was utilized for arable crops (almost 336'000 hectares); while almost 74 percent was grassland/grazing areas (5.9 million hectares). Permanent crops were grown in more than 740'000 hectares (9 percent of the organic area in the region), and for 13 percent of the reported area, no details were available. Argentina (nearly 3.4 million hectares), Uruguay (over 2.1 million hectares), and Brazil (over 318'000 hectares) had the largest permanent grassland/grazing areas.

The key organic arable crops are cereals, with more than 165'000 hectares, representing 49 percent of the organic arable area of Latin America and Caribbean, and 0.3 percent of the total cereal area in the region. The key organic cereal in the region was quinoa (over 92'000 hectares) representing more than 53 percent of all the quinoa grown in the region. Organic sugarcane was grown on more than 78'000 hectares in 2018, 0.6 percent of the total sugarcane in the region, with the key producing countries being Paraguay (almost 34'000 hectares) and Argentina (almost 19'000 hectares).

The main organic permanent crops were coffee (almost 248'000 hectares), cocoa (almost 148'000 hectares), and tropical and subtropical fruits (almost 131'000 hectares). Organic coffee represented 5 percent of the total coffee area in the region and 48 percent of the world's organic coffee. The countries with the largest organic coffee areas were Peru (over 121'000 hectares), Mexico (over 44'000 hectares), and Nicaragua (nearly 24'000 hectares). Furthermore, 8.7 percent of the cocoa area in Latin

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

America is organic. More than 46 percent of the world's organic cocoa area and some of the countries with the largest organic cocoa areas are in Latin America. Nicaragua is the country with the largest area, with more than 81′000 hectares, followed by Peru (almost 37′000 hectares), and Ecuador (more than 15′000 hectares). Organic bananas are the key tropical fruit grown in the region (over 73′000 hectares), 3.3 percent of the regional banana area is organic. The countries with the largest organic banana area are the Dominican Republic (over 41′000 hectares) and Ecuador (over 14′000 hectares); these two countries represent almost three-quarters of the regional organic banana area.

Producers

Almost 228′000 organic producers were recorded in Latin America and the Caribbean, in 2018. The countries with the most organic producers are Peru (103′500), Mexico (over 27′000), and Brazil (over 17′500). It can be assumed that the number of producers is higher because some countries only report the number of farm enterprises/companies. The reported drop of producers compared to previous years is due to the change of the data source in the case of Mexico.

Wild collection

In Latin America and the Caribbean, organic wild collection plays an important role. There are over 3.4 million hectares of organic wild collection areas. They are mainly used for the collection of wild nuts (1.1 million hectares), palmito (more than 66′000 hectares) and mushrooms (over 380 hectares). The countries with the largest organic wild collection areas are Brazil (over 1.2 million hectares, 2011 data), Mexico (0.9 million hectares), Bolivia (0.9 million hectares, data 2014), and Peru (over 0.2 million hectares, mainly wild chestnuts). Information on wild collection is not available for many countries, so it can be assumed that the total organic wild collection area is higher than that presented here.

For more information about the Latin American and the Caribbean figures, see data tables for the region, page 274.

Organic Agriculture in Latin America and Caribbean: Graphs

Latin America and Caribbean: The ten countries with the largest organic area 2018
Source: FiBL survey 2020

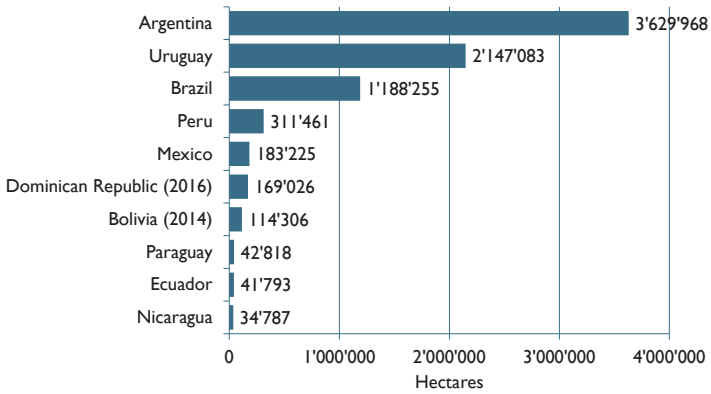


Figure 95: Latin America and Caribbean: The ten countries with the largest areas of organic agricultural land 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Latin America and Caribbean: The countries with the highest organic share of total agricultural land 2018
Source: FiBL survey 2020

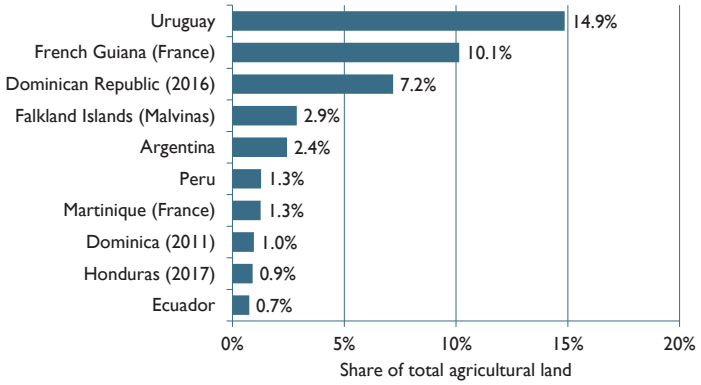


Figure 96: Latin America and Caribbean: The ten countries with the highest organic share of total agricultural land 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Latin America and Caribbean: Development of organic agricultural land 1999 to 2018
Source: FiBL-IFOAM-SOEL-Surveys 2002-2020

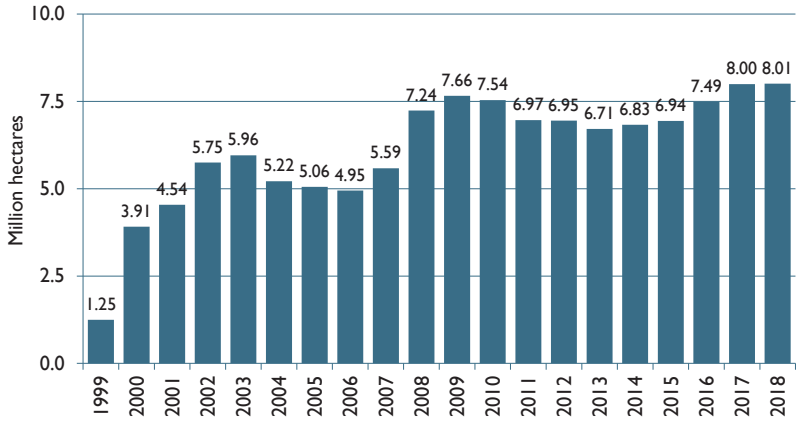


Figure 97: Latin America and Caribbean: Development of organic agricultural land 1999-2018

Source: FiBL-IFOAM-SOEL surveys 2001-2020

Latin America and Caribbean: Use of organic agricultural land 2018
Source: FiBL survey 2020; based on information from the private sector, certifiers, and governments.

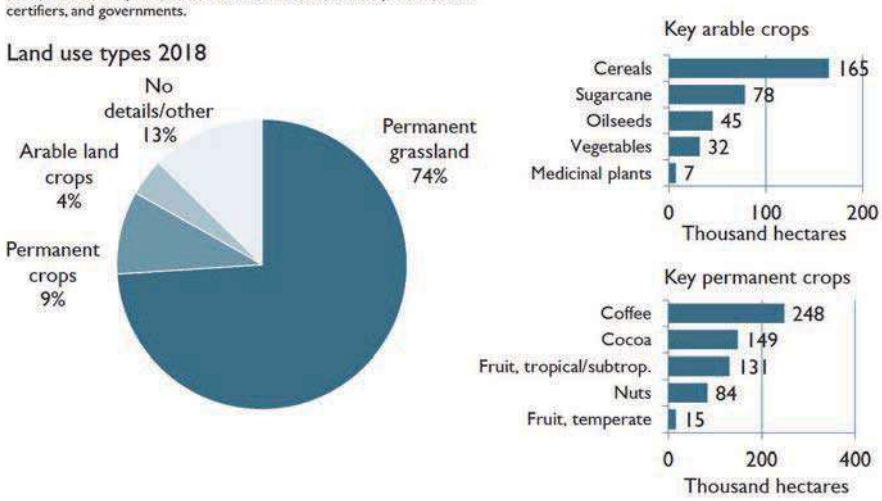


Figure 98: Latin America and Caribbean: Use of agricultural organic land 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Organic Agriculture in Latin America and Caribbean: Tables

Table 70: Latin America: Organic agricultural land, organic share of total agricultural land, and number of producers 2018

For information on data year, see page 309.

Country	Area [ha]	Organic share [%]	Producers [no.]
Argentina	3'629'968	2.4%	1'366
Bahamas	49	0.3%	1
Belize	220	0.1%	150
Bolivia	114'306	0.3%	12'114
Brazil	1'188'255	0.4%	17'508
Chile	16'305	0.1%	1'609
Colombia	22'314	0.05%	3'496
Costa Rica	8'964	0.5%	50
Cuba	6'181	0.1%	510
Dominica	240	1.0%	
Dominican Republic	169'026	7.2%	16'119
Ecuador	41'793	0.7%	12'912
El Salvador	1'679	0.1%	380
Falkland Islands (Malvinas)	31'937	2.9%	4
French Guiana (France)	3'103	10.1%	75
Grenada	84	1.1%	23
Guadeloupe (France)	272	0.5%	63
Guatemala	14'000	0.4%	6'346
Haiti	4'403	0.2%	4'661
Honduras	29'274	0.9%	6'023
Jamaica	374	0.1%	127
Martinique (France)	398	1.3%	64
Mexico	183'225	0.2%	27'000
Nicaragua	34'787	0.7%	8'193
Panama	5'929	0.3%	18
Paraguay	42'818	0.2%	5'187
Peru	311'461	1.3%	103'554
Puerto Rico	14	0.01%	5
Suriname	94	0.1%	39
US Virgin Islands	26	0.7%	
Uruguay	2'147'083	14.9%	12
Total*	**8'008'581**	**1.1%**	**227'609**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315
**Total number includes data for countries with less than three operators.*

Table 71: Latin America: All organic areas 2018

Country	Agriculture [ha]	Aquaculture [ha]	Forest [ha]	Other non agri. land [ha]	Wild collection [ha]	Total [ha]
Argentina	3'629'968				1'001	3'630'969
Bahamas	49					49
Belize	220					220
Bolivia	114'306				922'991	1'037'297
Brazil	1'188'255				1'229'445	2'417'700
Chile	16'305				51'548	67'853
Colombia	22'314			23'090	7'320	52'724
Costa Rica	8'964					8'964
Cuba	6'181					6'181
Dominica	240					240
Dominican Republic	169'026					169'026
Ecuador	41'793	79	40'007		330	82'209
El Salvador	1'679					1'679
Falkland Islands (Malvinas)	31'937					31'937
French Guiana (France)	3'103					3'103
Grenada	84					84
Guadeloupe (France)	272					272
Guatemala	14'000				5	14'005
Guyana					60'000	60'000
Haiti	4'403					4'403
Honduras	29'274					29'274
Jamaica	374				36	410
Martinique (France)	398					398
Mexico	183'225				958'380	1'141'605
Nicaragua	34'787					34'787
Panama	5'929					5'929
Paraguay	42'818					42'818
Peru	311'461	4			213'393	524'858
Puerto Rico	14					14
Suriname	94					94
US Virgin Islands	26					26
Uruguay	2'147'083					2'147'083
Total	**8'008'581**	**83**	**40'007**	**23'090**	**3'444'450**	**11'516'211**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Table 72: Latin America: Land use in organic agriculture 2018

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		**873'184**
Arable crops	Cereals	165'361
	Dry pulses	3'666
	Fallow land, crop rotation	426
	Fresh vegetables and melons	31'801
	Industrial crops	0.3
	Medicinal and aromatic plants	7'012
	Mushrooms and truffles	0.06
	Oilseeds	45'261
	Plants harvested green	62
	Root crops	532
	Seeds and seedlings	113
	Strawberries	9
	Sugarcane	78'425
	Textile crops	1'876
	Tobacco	45
	Arable crops, other	1'151
Arable crops total		***335'740***
Cropland, no details		**133'847**
Other agricultural land		**1'647**
Permanent crops	Berries	9'534
	Citrus fruit	11'550
	Cocoa	148'510
	Coconut	2'173
	Coffee	247'789
	Flowers and ornamental plants, permanent	2
	Fruit	870
	Fruit, temperate	15'378
	Fruit, tropical and subtropical	130'998
	Grapes	8'101
	Medicinal and aromatic plants, permanent	974
	Nuts	83'571
	Olives	5'154
	Tea	1'833
	Permanent crops, other	73'839
Permanent crops total		***740'278***
Permanent grassland		**5'923'885**
Total		**8'008'581**

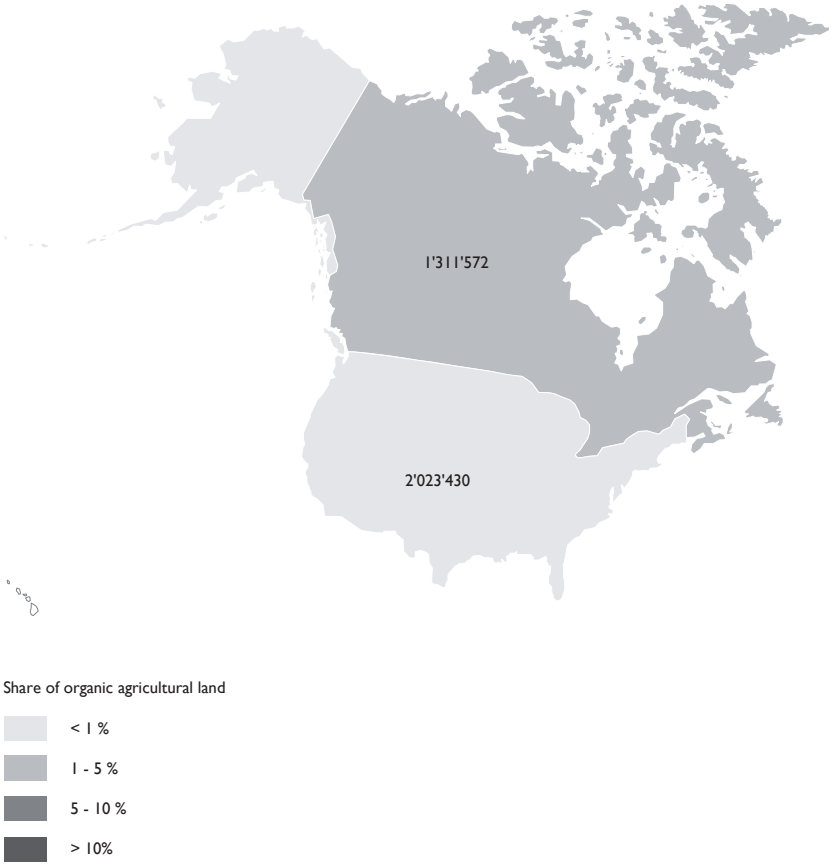
Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Table 73: Latin America: Use of wild collection areas 2018

Land use	Area [ha]
Apiculture	5
Mushrooms, wild	330
Palmito, wild	66'800
Nuts, wild	1'136'385
Wild collection, no details	2'240'930
Total	**3'444'450**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

North America



Map 6: Organic agricultural land in Canada and the United States 2018

Source: Canada Organic Trade Association (COTA) and United States Department of Agriculture (USDA). For detailed data sources see annex, page 315.

US Organic Sales Break Through 50 Billion Dollar Mark

Barbara Fitch Haumann[1]

The US organic market in 2018 broke through the 50 billion US dollar mark for the first time, with sales hitting a record 52.5 billion US dollars, up more than 6 percent from the previous year, according to the 2019 Organic Industry Survey released by the Organic Trade Association.

New records were made in both the organic food market and organic non-food market. Organic food sales reached 47.9 billion US dollars, for an increase of 5.9 percent compared to 2017. Sales of organic non-food products jumped by 10.6 percent to 4.6 billion US dollars. The growth rate for organic continued to easily outpace the general market, with total US food sales in 2018 edging up just 2.3 percent and total non-food sales rose only 3.7 percent.

Almost six percent of the food sold in the United States is now organic. Today's consumers can find organic products in every aisle of their grocery stores, at big box stores, club warehouse stores, neighborhood convenience stores, and increasingly on the internet.

Millennials are a major factor, pushing for transparency and integrity in the food supply chain, and are savvy to misleading marketing. The USDA Organic seal is gaining new appeal as consumers realize that organic is a certification that is not only monitored and supported by official standards, but is the only seal encompassing the spectrum of Non-GMO, no toxic pesticides or chemicals, dyes or preservatives.

Farmers are choosing organic

The latest organic production data available from the US Department of Agriculture's (USDA's) National Agricultural Statistics Service (NASS) come from its 2017 Census of Agriculture on characteristics of all US farms and farms with organic sales. According to the report, NASS recorded 11'650 certified organic farms with 50 percent or more of their total sales from organic production, with another 4'301 certified farms reporting their organic operations generated less than 50 percent of their total sales. Meanwhile, 2'215 farms with organic sales registered as exempt from certification because their annual gross organic sales are below 5'000 US dollars. The average age of producers was 57.5 years for all farms, while that of certified organic farmers was around 50.5 years.

Meanwhile UDA's Organic Integrity Database as of December 2019 included 27'777 records of certified organic operations (farms and handlers) across all 50 states.

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[1] Barbara Fitch Haumann is Senior Writer/Editor for the Organic Trade Association headquartered in Washington, D.C., USA.

Stepping up global trade

2019 was a successful year for US international organic programs overseen by the Organic Trade Association and funded through USDA, with 17 international activities in seven countries. Overall, 45 US companies participated in international trade shows and trade missions. In 2019 alone, projected US organic export sales from international activities with the trade association were over 34 million US dollars. These activities are crucial to opening and maintaining market access for US organic products across the globe. Activities took place in Asia, Europe, Latin America, the Middle East, and North America, with an increase in demand for organic baby food, snacks, nuts, and pre-packed meals in particular.

During the year, the trade association unveiled its new organic business directory, Find.Organic. This is an intuitive online tool designed to become the go-to source for information on US organic products. There are over 950 companies listed on this online directory created to help facilitate industry connections domestically and abroad. Users can search the directory to source ingredients for organic products, get connected to an organic certifier or distributor, create business connections to export US-produced organic products, and so much more.

Organic fraud prevention

In a major step by the organic industry to fight against fraud globally, the Organic Trade Association officially launched its ground-breaking Organic Fraud Prevention Solutions program. Organic businesses may now voluntarily enroll in this program to help minimize or eliminate organic fraud both inside and outside of the United States. The new program is based on the trade association's tested Organic Fraud Prevention Guide that provides businesses engaged in organic trade with a risk-based process for developing and implementing organic fraud mitigation measures. The program is a quality assurance program, not a certification or verification program.

Integrity of organic standards

Animal welfare: The Organic Trade Association continued its court fight to advance organic animal welfare standards with a clear and concise rule. Originally prompting this legal battle was USDA's repeated refusal to act on--and subsequent withdrawal of--a thoroughly vetted Organic Livestock and Poultry Practices final rule to improve livestock living conditions and care, including requiring poultry access to the outdoors. In doing so, USDA failed to follow the public/private rulemaking process established by the Organic Foods Production Act of 1990 that Congress created, the industry worked within, and consumers trust. This case has importance to all organic stakeholders because USDA's refusal to follow the process by which organic regulations are set could reverberate adversely for years if not corrected by the federal judiciary. At the end of the year, the issue was still before the courts.

Organic Flavors: As of December 27, 2019, USDA's National Organic Program (NOP) now requires the use of organic flavors when they are commercially available in the appropriate quality, quantity or form in place of natural flavors. This is a forward step

for expanding further development and production of organic flavors, and is the result of a petition submitted by the Organic Trade Association to the National Organic Standards Board (NOSB) in 2014.

Vegetarian "Made with Organic" supplements: At its April 2019 meeting, NOSB approved a proposal to add pullulan to the National List to allow the availability of certified vegetarian encapsulated dietary supplements that could be labeled "made with organic." Without this action, the production of NOP certified encapsulated vegetarian supplements would not be possible.

Origin of Livestock: During 2019, efforts focused on securing a final rule on the standard for Origin of Organic Livestock. Both the organic sector and Congress made it clear that USDA needed to act to address the inconsistency in enforcement of organic standards that now puts organic livestock farmers at a devastating economic disadvantage. They are seeking a final rule clarifying that: a) organic dairy animals must be raised organically from the last third of gestation or be raised organically for one year if transitioning a conventional herd to organic; b) once a distinct herd is transitioned to organic, all animals must be raised organically from the last third of gestation; and c) cycling of dairy animals in and out of organic production is prohibited. Action on this issue is expected in early 2020.

Voluntary research and promotion

During 2019, the US organic sector moved ahead with an innovative check-off like voluntary program operating as GRO Organic (Generate Results and Opportunity for Organic). For this endeavor, the Organic Trade Association has partnered with The Organic Center and numerous organic brands, businesses and leaders across the industry to implement projects as prototypes that can be expanded into even more ambitious future initiatives. In less than a year, organic stakeholders invested 1.5 million US dollars to advance projects that focus on four key actions:

- **Launching a national campaign to reduce consumer confusion about organic**--Since its launch, the campaign has served more than 15 million impressions and reached close to 4 million unique consumers using the message *Skip the chemicals*. The campaign will continue in 2020.
- **Learning what customers are hearing, and how it affects their behavior**--This entails a 25-minute online survey with at least 3'020 respondents from the general population (balanced on age, gender, ethnicity, geography, education and income). Twenty messaging concepts were developed, with each respondent seeing and responding to five concepts on a randomized basis.
- **Connecting technical specialists with transitioning and existing organic farmers as well as programs to train the trainers**--The Organic Agronomy Training Service (OATS) is a "train-the-trainer" program for agricultural professionals working with organic and transitioning farmers. It held three trainings in 2019 focused on domestic grain producers. They plan to hold at least five regional trainings in 2020.

– **Researching how organic is part of the solution to soil health and climate change**--The Organic Center is directing the GRO Organic research portfolio, combining soil and climate issues with farmer benefits to move the needle toward a more sustainable climate. Projects and collaborators are: **Science-based best management practices for healthy soil on organic farms** (University of Maryland); **Investigating the impacts of organic Management on carbon sequestration** (University of Maryland); and **Impacts of organic soil-building strategies on yield** (University of California, Berkeley).

Strengthening NOP

A bold theme for the organic sector in 2019 and beyond centers on improvement and accountability. During 2019, the trade association declared it was time to repair the public-private partnership that encompasses the USDA organic program so that industry can continue to advance and meet consumer expectations.

As 2019 came to a close, NOP was expected to release a proposed rule early in 2020 on Strengthening Organic Enforcement and Oversight to strengthen the organic regulations in multiple areas where increased oversight and enforcement are needed. This may be the largest piece of single rulemaking in the history of NOP. The outcome of the revised rule will undoubtedly affect organic trade.

The 2018 Farm Bill authorized spending for this work, including money for NOP to invest in technology systems to modernize and improve international organic trade tracking and prevent fraud, and to require electronic organic import certificates to ensure full traceability without hindering trade and establishing a USDA tracking system. It also would establish an interagency working group between USDA and Customs and Border Protection to verify the authenticity of organic imports.

Moreover, the sector will continue its advocacy for a final rule on Origin of Livestock, and monitor progress for animal welfare standards through the trade association's court battle with USDA.

New opportunity: domestic organic hemp

Meanwhile, domestic hemp production will offer a new opportunity for organic producers. In late October, USDA published an Interim Final Rule establishing the US Domestic Hemp Production Program for monitoring hemp cultivation and production. This rule stems from the 2018 Farm Bill's legalization of hemp. Previously, the 2014 Farm Bill had only allowed institutions of higher education and state agriculture departments to grow hemp under a research pilot program where state laws permitted it. Now, NOP has issued its updated instructions for USDA organic certification of industrial hemp. Only hemp produced in accordance with the US Domestic Hemp Production Program may be certified organic if produced in accordance with USDA's organic regulations. This action is predicted to open up organic hemp acres in the United States. For imported hemp, existing regulations and guidelines continue to govern whether products may be certified as organic.

References

- 2017 Census of Agriculture: Characteristics of all U.S. farms and farms with organic sales, https://www.nass.usda.gov/Publications/AgCensus/2017/Online_Resources/Organics_Tabulation/organictab.pdf), USDA's National Agricultural Statistics Service, Issued October 2019.
- 2019 Organic Industry Survey, Organic Trade Association, 2019.
- GRO Organic hits the ground running with major programs underway, Organic Trade Association, March 4, 2019, https://ota.com/news/press-releases/20507
- Organic Fraud Prevention Solutions, Organic Trade Association, 2019 https://ota.com/OrganicFraudPrevention
- Origin of Livestock Federal Register Notice, Oct. 1, 2019 https://www.federalregister.gov/documents/2019/10/01/2019-20869/national-organic-program-origin-of-livestock
- U.S. Department of Agriculture's National Agricultural Statistics Service Newsroom https://www.nass.usda.gov/Newsroom/2019/11-19-2019.php, November 19, 2019.
- U.S. Department of Agriculture's Organic Integrity Database, December 2019, https://organic.ams.usda.gov/integrity/
- U.S. Domestic Hemp Production Program, https://www.ams.usda.gov/rules-regulations/hemp

Canada

TIA LOFTSGARD[1]

Canada's national consumer campaigning efforts

Canada's 10th annual organic week took place from September 8th-16th, 2019. This nationwide celebration of organic food, farming, and products brings together the entire supply chain – farmers, retailers, industry, and consumers – to celebrate the benefits of organic farming on human health and the environment. The campaign's success relied on the unwavering support of 18 organic sponsors, ensuring that Organic Week continues to flourish every year. In its 10th year, the Organic Week campaign boasted over 3 million social media impressions of #OrganicWeek, over half a million advertising impressions, more than 20 earned media impressions, and nearly 1'400 consumer contest entries. 1'000 retailers participated in the campaign, displaying promotional tools in their stores nationwide and offering discounted organic products. Participants were also encouraged to download and use Organic Week's free digital assets, including campaign logos, imagery, social media graphics, email signatures, and more.

New regulatory framework for organics

The Safe Food for Canadians Act was passed in 2012 and brought into force January 15, 2019 in Canada. Organic is covered under Chapter 14 of the Safe Food for Canadian Regulations. The previously voluntary aquaculture standard, CGSB 32.312, is now regulated under the scope of the Canadian Organic Regime. The Aquaculture standard will not be enforceable until January 15, 2021, allowing a one-year window for operators to comply. Canada is very interested in exploring equivalency arrangement expansions with other jurisdictions that have aquaculture included in their regulated standards.

Updated organic standards in Canada coming 2020

The Canadian Organic Standards are in their review process to be updated as part of its regular 5-year review process. The new standards will be published in November 2020 and will be mandatory November 2021. Canada will be reviewing equivalency arrangements in light of these changes as well as the new regulatory framework.

Massive growth in new farms adopting organic

The Canadian organic sector continues to record significant growth despite the overall agricultural land base remaining stable and non-organic farm operations are in decline. There are now 7266 certified organic operations, up from 6357 certified

[1] Tia Loftsgard, Executive Director, Canada Organic Trade Association, Ottawa, Canada

operations in 2017. This 14% increase can be attributed to continued consumer demand that continues to place organic as the fastest growing sector of agriculture in Canada. The operator growth was primarily due to more farmers converting to organic. In 2018, the total of certified organic producers was 5791 (4'800 the year prior) and resulted in 3.3 million acres of certified acreage. Organic acreage is 2.1% of the total agricultural land of Canada, well above the global average. While the number of total farms has declined across Canada, organic producers are flourishing. There are more organic farms operating on more acres than ever before in Canada.

Organic processing

COTA launched is first ever Organic Food Service Report, outlining the barriers to growth as well as the opportunity and innovation occurring within the organic food processing sector. According to the research report, there are 1719 organic food processors/handlers and manufacturing companies in Canada. The estimated sales value of organic processed foods and beverages is $2.95 billion in sales for 2019. According to interviews with the leading organic food processors in Canada, most businesses are experiencing year-over-year growth in excess of 10%.

Market updates

Canada's total organic market (including food and non-food items) has reached 6.38 billion Canadian dollars, up from 3.5 billion Canadian dollars in 2012, with a compound annual growth rate of 8.7%. The 2017 statistics indicate the market share of organic food and beverages sold through mainstream retailers has grown from 1.7% to 2.6%.

In late 2019, the Canada Organic Trade Association released the first ever Canadian Organic Foodservice Report. This in-depth publication provides the most up-to-date overview of the Canadian organic foodservice market to provide valuable insights into the market size, growth trends and foodservice operator perceptions of why their customer base demands organic.

COTA's State of Organic Performance Report

The Canada Organic Trade Association released its 2018 report evaluating the federal and provincial government performance on supporting the growth of the organic sector. Key recommendations outlining regulatory and programmatic gaps that need to be addressed brought significant attention to the issues the industry face and some positive changes occurred as a result of the report.

Canada's national organic standards apply to products that are sold across provincial, territorial or national borders or bear the Canada Organic logo. However, a significant regulatory gap exists for products that are grown and sold only within provincial borders and do not bear the Canada Organic logo as there is no federal oversight of products that claim to be organic in these scenarios. Provincial Organic regulations are necessary to ensure a level playing field for organic farmers in order to have provincial oversight and enforcement over organic claims for products sold within

their provinces. Alberta's Provincial regulation came into force in 2019, now bringing the number of provinces that have a regulation up to six (out of the ten provinces). Ontario is currently in the law-making process in order to adopt a regulation in 2020.

Links/further reading

- Canada Organic Trade Association – www.canada-organic.ca and www.canada-organic.myshopify.com (publications)
- Canadian Organic Growers – www.cog.ca
- Organic Federation of Canada – www.ofc.ca
- Organic Agriculture Centre of Canada at Dalhousie University - https://www.dal.ca/faculty/agriculture/oacc/en-home.html

North America: Current statistics

JAN TRÁVNÍČEK[1], BERNHARD SCHLATTER[2], JULIA LERNOUD[3] AND HELGA WILLER[4]

Overview

North America's organic agricultural land was 3.3 million hectares in 2018, which is 0.8 percent of the total agricultural area. The area under organic cultivation has trebled from the million hectares in 2000, and now represents five percent of the global organic agricultural land. Between 2017 and 2018, the area increased by almost 112'000 hectares or 3.5 percent. Over 2.0 percent of the farmland in Canada is organic, and the proportion in the United States is 0.6 percent. There is a total of 23'957 producers in North America; most of them are in the United States (over 75 percent).

Land use

Land use details were available for almost the whole of the organic agricultural land. In 2018, only five percent of all organic farmland was utilized for permanent crops (almost 152'000 hectares) while more than 44 percent was used to grow arable crops (nearly 1.5 million hectares), and 41 percent (nearly 1.4 million hectares) was grassland/grazing. The United States has the largest grassland/grazing area, almost 933'000 hectares, and Canada reported more than 439'000 hectares.

The key organic arable crop group is cereals, with more than 600'000 hectares, representing almost 41 percent of the region organic arable area, and 0.9 percent of the total cereal area in the region. In the United States, over 281'000 hectares of organic cereals were grown, and Canada reported more than 319´000 hectares. The key organic cereal in the region was wheat (more than 286´000 hectares), this represented 1.2 percent of the total wheat grown in the region. Organic vegetables were grown on 73'000 hectares in 2018, 8.1 percent of the total vegetables in the region, with leafy/stalked vegetables (nearly 25'000 hectares) and fruit vegetables (over 16'500 hectares) being the key produced vegetables.

The main organic permanent crops were temperate fruits (almost 12'500 hectares), grapes (almost 12'000 hectares), and berries (almost 11´000 hectares). Organic temperate fruits represented 4.2 percent of the total temperate fruit area in the region. The key temperate fruits are apples, cherries, and peaches. The key organic berries are blueberries (over 6'400 hectares, 10.4 percent of the total blueberries grown in the region), and cranberries (800 hectares, 3.3 percent of the region's cranberries).

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Producers

In 2018, 23'957 organic producers were reported in North America. The United States is the country with the most organic producers, over 18'000, and Canada reported over 5′700 organic producers. Since 2004, when there were 11′000 organic producers, the number increased over 109 percent.

Wild collection

Unfortunately, for the United States data on organic wild collection is not available with the exception of over 4′200 ha of wild cereals and over 300 of wild blueberries, so it can be assumed that the wild collection area is much bigger in the region than the current 28'468 hectares reported mainly by Canada.

Market

In 2018, the organic market continued to grow in North America, reaching almost 43.7 billion euros. In Canada, the organic market grew by over 3.9 percent in 2018, and in the United States, the organic market grew by 1.4 percent. The United States is the largest single organic market in the world, and North America continues to be the region with the largest organic market. In the United States, people spent 125 euros per capita on organic products in 2018, while in Canada the per capita consumption was 84 euros. For 2018, Canada reported an organic share of the total retail sales of 2.6 percent, and in the United States, an organic share 5.7 percent was noted.

For more information about the North American figures, see data tables, page 286.

Organic Agriculture in North America: Graphs

North America: Organic agriculture area 2018
Source: COTA and USDA, 2020

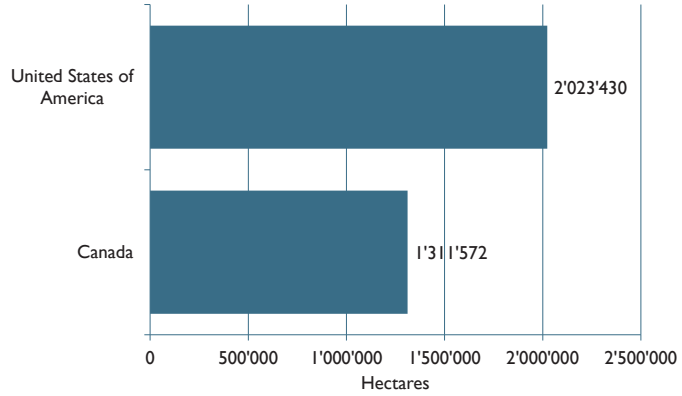


Figure 99: North America: Organic agricultural land in Canada and the United States 2018

Source: Canada Organic Trade Association and United States Department of Agriculture.

North America: Organic share of total agricultural land 2018
Source: COTA and USDA, 2020

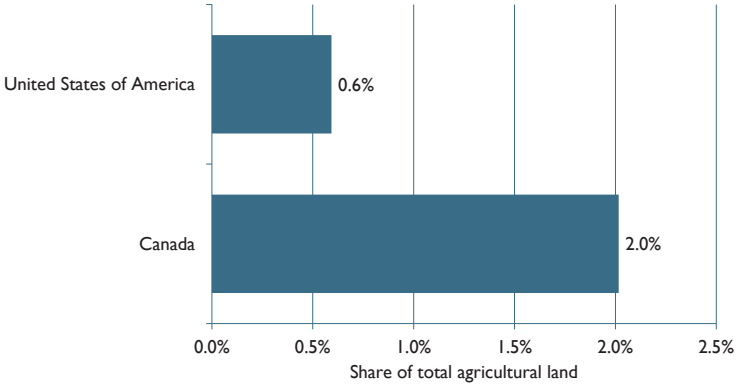


Figure 100: North America: Organic share of total agricultural land in Canada and the United States 2018

Source: Canada Organic Trade Association and United States Department of Agriculture.

North America: Development of organic agricultural land 2000-2018
Source: COG-COTA and USDA, 2000-2018

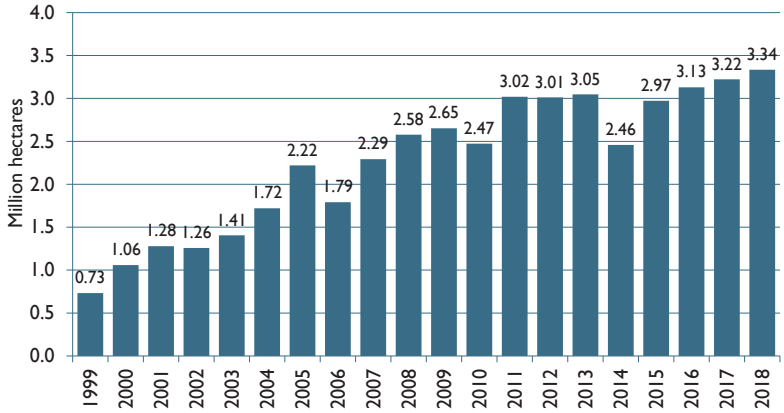


Figure 101: North America: Development of organic agricultural land 1999-2018

Source: Canada Organic Trade Association and United States Department of Agriculture[1]

North America: Use of organic agricultural land 2018
Source: FiBL survey 2020; based on information from the private sector, certifiers, and governments.

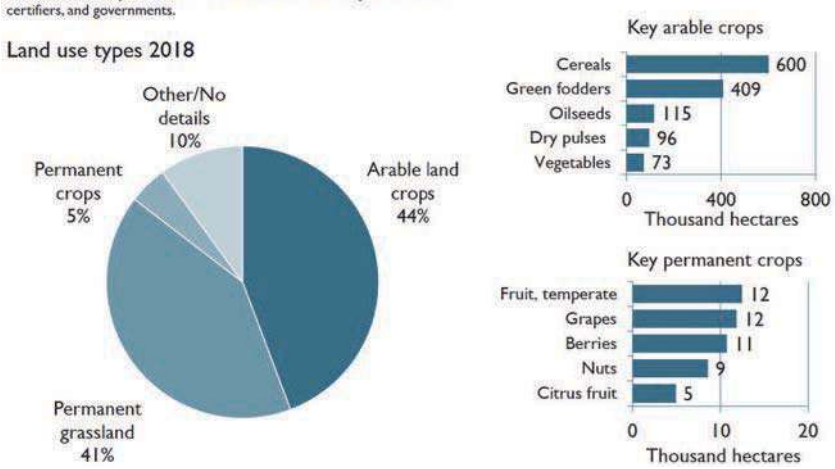


Figure 102: North America: Land use in organic agriculture 2018

Source: Canada Organic Trade Association and United States Department of Agriculture

[1] Due to methodological differences, the United States shows a drop of its area in 2014. A reason could be that the wild collection might have been included in the past.

Organic Agriculture in North America: Tables

Table 74: North America: Organic agricultural land, organic share of total agricultural land, and number of producers 2018

Country	Area [ha]	Share of total agr. land [%]	Producer [no.]
Bermuda		Processing	
Canada	1'311'572	2.0%	5'791
United States of America	2'023'430	0.6%	18'166
Total	**3'335'002**	**0.8%**	**23'957**

Source: Canada Organic Trade Association and United States Department of Agriculture; FiBL survey 2020

Table 75: North America: All organic areas 2018

Country	Agriculture [ha]	Forest [ha]	Other non agri. land [ha]	Wild collection [ha]	Total [ha]
Bermuda			Processing		
Canada	1'311'572		21'487	6'643	1'339'701
United States of America	2'023'430	205'196		338	2'228'964
Total	**3'335'002**	**205'196**	**21'487**	**6'981**	**3'568'665**

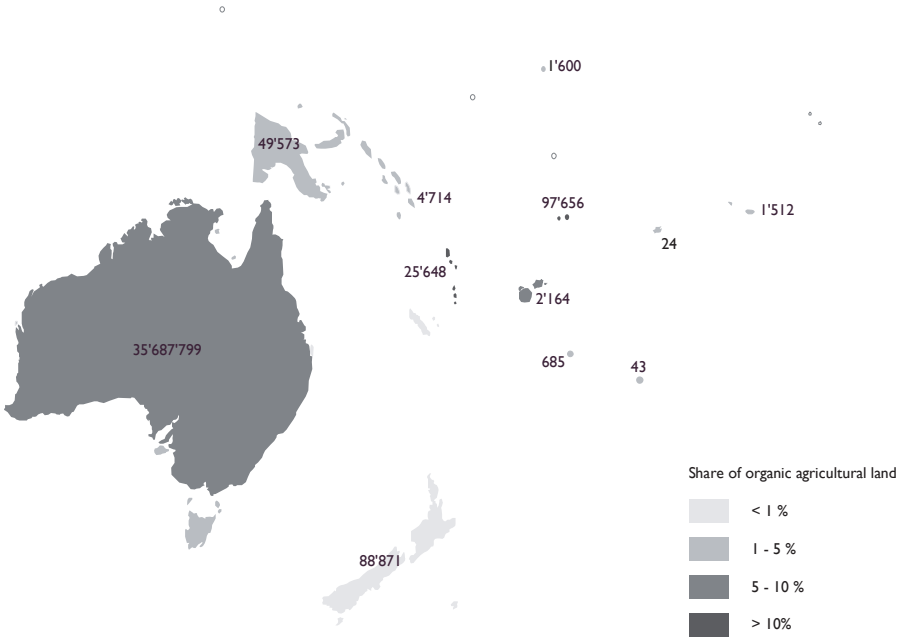
Source: Canada Organic Trade Association and United States Department of Agriculture; FiBL survey 2020

Table 76: North America: Land use in organic agriculture 2018

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		**307'809**
Arable land crops	Arable crops, no details	5'863
	Cereals	600'363
	Dry pulses and protein crops for the production of grain	95'590
	Fallow land, crop rotation	127'440
	Flowers and ornamental plants	380
	Hops	297
	Medicinal and aromatic plants	943
	Mushrooms and truffles	11'375
	Oilseeds	115'063
	Plants harvested green	408'743
	Root crops	12'026
	Strawberries	2'590
	Textile crops	11'631
	Tobacco	4'045
	Vegetables	73'238
	Arable crops, other	7'095
Arable land crops total		***1'476'682***
Other agricultural land total		**26'651**
Permanent crops	Berries	10'726
	Citrus fruit	4'919
	Coffee	87
	Fruit, temperate	12'465
	Fruit, tropical and subtropical	3'519
	Grapes	11'836
	Nurseries	91
	Nuts	8'575
	Olives	719
	Permanent crops, other	96'810
Permanent crops total		***151'966***
Permanent grassland		**1'371'893**
Total		**3'335'002**

Source: Canada Organic Trade Association and United States Department of Agriculture; FiBL survey 2020

Oceania



Map 7: Organic agricultural land in the countries of Oceania 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers and governments.

Australia – Findings from the Australian Organic Market Report 2019[1]

HARRIET KENDRICK[2]

Introduction

Now estimated to be worth 2.6 billion Australian dollars, the Australian organic industry (exports and retail sales) continued to grow in 2018 despite harsh environmental conditions - with many regions still experiencing significant drought. In the 2012 to 2018 period, a compound annual growth rate (CAGR) of 13 percent was achieved, as the industry continues to react to significant international trends including consumer demands for convenience-based products**.** The growing interest in Australian products from export markets is continuing to forge ahead with the amount of total export volume for 2018 growing by 13 percent since 2017. Over 2018, 30'155 tonnes of organic products were exported to 61 different countries.

The number of certified organic operations has grown by 19 percent since 2017 with certified organic farmland in Australia now representing over 35.7 million hectares – about half of the global organic farmland. Consumers continue to recognise the benefits of organic produce and the importance of certification marks on product labels, as 55 percent of organic buyers now look for certification logos on their products.

Primary producers and area of farmland

Australia continues to hold the world's largest area of agricultural land under certified organic management. Celebrating their 20th-anniversary publication, the World of Organic Agriculture Report 2019 reports there were 69.8 million hectares of organic farmland in 2017 with a record growth of 20 percent (11.7 million hectares) since 2016 (Willer/Lernoud 2019). Also in 2018, Australia continued to hold about half of the total global area, with at least 35.7 million hectares of certified organic farmland (approximately 9.6 percent of all of Australia's agricultural land). The vast majority of Australia's organic farmland is pastoral operations focused particularly on beef cattle. While most of the Australian producers are active in the production of livestock fodder, fruit, vegetables and lamb/sheep meat, the Australian processing and manufacturing sectors are dominated by fruit, vegetables and dairy products.

The number of certified operators (producers, processors, handlers, importers and exporters) in Australia grew by 19 percent in 2018, an increase from 4'028 in 2017 to 4'802 in 2018. Australia also saw an increase in the number of processors and handlers

[1] Australian Organic Ltd (2019): Australian Organic Market Report 2019. Australian Organic Ltd, Nundah, QLD, Australia, www.austorganic.com

[2] Harriet Kendrick, Communications & Digital Coordinator, Australian Organic Ltd, Nundah, Australia, www.austorganic.com

at 2'077 and 896 respectively (in line with historical trends), whereas the number of organic producers continues to fall. Down from 2'075 in 2016, there were 1'829 organic producers in Australia in 2018 – a decrease perhaps due to the consolidation of smaller farmers into larger operations.

Certified organic producers and processors are found in all Australian states and territories, each with their particular niches. There is a shift compared to 2017 data of the proportion of overall certified organic producers within both plant-based and animal-based categories, which reflects the climatic challenges of the past year and the ability of the organic sector to diversify in response to climate variability. Due to the drought and shortages of available feed for many livestock producers (particularly in New South Wales (NSW) and Queensland), the year has seen the largest demand for hay and grain for at least a decade with livestock fodder transported from Western Australia, South Australia and Victoria, north to NSW and Queensland.

Table 77: Estimated certified organic primary producer operations and area in Australia 2002-2018

Year	Primary producers/operations	Area under certified organic management (ha)
2002	1'650	6'150'171
2003	1'730	11'198'188
2004	1'859	12'077'362
2005	1'871	11'715'744
2007	1'776	11'988'044
2009	2'129	12'001'724
***2011**	2'117	11'199'578
2014	1'707	22'690'000
****2015**	1'999	22'108'495
****2016**	2'075	27'145'021
****2017**	1'998	35'645'038
****2018**	1'829	35'687'799

**Estimated using Australian Bureau of Statistics (ABS) data. Organic industry sources put this as high as almost 17 million hectares.*
*** Based on data from the two largest certifiers only – ACO Certification Ltd and NASAA Certified Organic (NCO) – and therefore an underestimate.*
Sources: 2002-2019 Australian Organic Market Reports

Production value

Organics now represents three percent of the total production value of all agricultural commodities, a significant increase from 1 percent in 2014.

Fruit, vegetables, nuts, meat, grains, eggs and poultry meat together constitute 82 percent of the production value with continued significant growth of fruit, vegetable and nuts by around 17 percent since 2017.

Across all the sectors, there has been substantial growth, with an estimated CAGR of 15 percent since 2014. However, there has been a slowing in meat, dairy, grains, eggs

and poultry meat, wine, honey and animal feedstuffs, which is indicative of the impacts of drought on commodities.

Given the impacts of the drought, overall farm-gate production, processing and export continue to be strong, reflected by the substantial gains since 2012 even though the growth rate has fallen slightly since 2017 across the sectors.

Exports

Organic products grown and manufactured in Australia are exported to 61 countries, with modest new markets opening up in South America, Oceania, Africa, the Middle East and Europe. Key export markets for Australian organic food are the United States, Europe, China (including Hong Kong) and the Republic of Korea. Despite challenging dry seasonal conditions in eastern Australia in 2017 and 2018, the export scene for organic agriculture remains strong, with a growth of 13 percent in volume since 2017 and a compound annual growth rate (CAGR) of 13 percent from 2012 to 2018. In volume, the total exports amounted to 30'155 metric tonnes and 685 million Australian dollars (or 433 million euros) in 2018.

The top 5 export destinations from Australia by tonnes were the USA, China, New Zealand, South Korea and Singapore (Figure 103). Combined, these countries accounted for 70 percent of the total volume exported in 2018. Beef comprises almost a third of the export volume, followed by 18 percent for processed products, 12 percent for wine, and the remaining 38 percent (mainly in single digits) for all other organic export commodities. Singapore emerged as a growing importer of Australian organic products, representing 32 percent of dairy and 10 percent of baby food exports, which may account for the decrease of overall exports to Mainland China. Singapore is also now the largest importer of Australian produced organic fruit and vegetables. The strongest importer of Australian-produced organic soya products is South Korea, followed by Thailand with organic bakery items. Mainland China is strong in organic dairy and baby foods/formula, and Hong Kong is the dominant export destination for organic eggs. The Swedes continue their love for Australian organic wines and the Japanese for organic nuts.

One of the biggest export impediments for Australia is the country's lack of equivalency with chief markets. A significant obstacle to achieving equivalency is the absence of organic domestic legislation. Other challenges for Australia's organic exports continue to include multiple non-harmonised organic standards around the world, eco-label proliferation and 'buying local' trends.

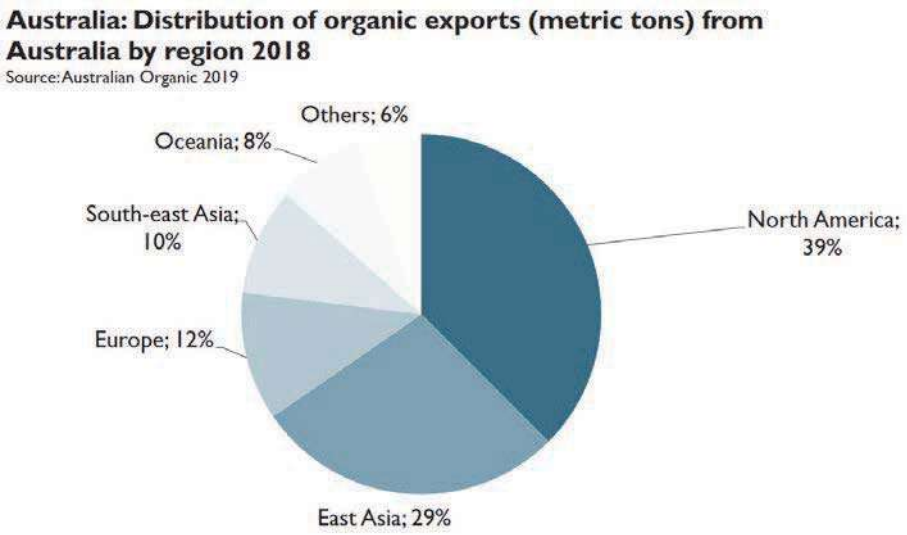


Figure 103: Australia: Distribution of organic export (metric tons) from Australia by region 2018

Source: Australian Organic Market Report 2019

Retail sales and the Australian organic consumer

The total value of Australian organic retail sales was 1.9 billion Australian dollars (approx. 1.2 billion euros) in 2018.

The most important product group is fruit, vegetables and nuts – more than half of the total retail sales value is spent on these products.

Industry insights conducted by the University of New England along with consumer insights from 1'025 Australians compiled by the market research group Mobium in February 2019 show that over 90 percent of purchasers say that they buy organic products in the supermarkets occasionally, with 51 percent of organic buyers saying they increased household food spending on organic products over the past year. Fifty-five percent of organic buyers say they look for a certification logo to check if a product is organic, up from 50 percent in 2018, and 3 in 4 organic shoppers say they regularly reference product labels and/or shelf information to make purchase decisions.

Fruit and vegetables remain the highest-ranked and the key entry category for organic purchasers, with over 6 in 10 shoppers saying they purchased organic fruit and vegetables at least once in the past 12 months.

Most current organic shoppers say that they began buying organic because of positive personal health impacts; just under half of the shoppers said that "becoming more aware of the impact food, fibre or cosmetics had on personal health" was the key prompt to start buying organic. While "free-from" aspects remain the key perceived benefits of organic food in the Australian community (8 in 10 shoppers see 'chemical-

free' as a recognised benefit), price and "value for money" remains the number one barrier for non-purchasers.

Regulatory framework

By law, Australian-produced products that are labelled as organic and exported from Australia must be certified as organic by one of the six government-accredited certifying organizations; AUSQUAL, ACO Certification Limited (ACOCL) (formerly known as Australian Certified Organic), BioDynamic Research Institute (BDRI), NASAA Certified Organic (NCO), Organic Food Chain (OFC) and Southern Cross Certified Australia (SCCA). Safe Food Production Queensland (SFPQ) renounced its accreditation early in 2018 and SCCA became the sixth accredited certifier body from March 2019.

The certifiers must certify to the National Standard for Organic and Bio-Dynamic Produce (National Standard) or another standard deemed equivalent to the National Standard. ACOCL, BDRI and NCO certify operators to their own standards (which incorporate the minimum requirements of the National Standard) for additional market access or branding purposes. OFC, AUSQUAL and SCCA certify directly with the National Standard. The National Standard was last updated in 2016 (Edition 3.7) and is maintained by the industry-owned and funded Organic Industry Standards and Certification Council (OISCC) on behalf of the Australian Government's Department of Agriculture and Water Resources (DAWR).

Research

The Centre for Organics Research at Southern Cross University continues to support the organic industry in Australia. Through a joint initiative between Southern Cross University and the New South Wales Department of Primary Industries, the Centre conducts research in partnership with industry stakeholders and the organic community, focusing on clarifying complex issues regarding supply chains and production systems. Professor Carlo Leifert continues to lead the initiative, bringing a wealth of knowledge and research experience surrounding organic and sustainable farming, food production systems and security.

References

ABS (2018) 7121.0 - Agricultural Commodities, Australia, 2016-17 https://www.abs.gov.au/AUSSTATS/abs@.nsf/allprimarymainfeatures/97B95C93A7FD9B75CA2573FE-00162CAF?opendocument

Australian Organic Ltd (2019): Australian Organic Market Report 2019. Australian Organic Ltd, Nundah, QLD, Australia www.austorganic.com

Willer, Helga and Julia Lernoud (Eds.), The World of Organic Agriculture - Statistics and Emerging Trends 2019. Research Institute of Organic Agriculture FiBL and IFOAM - Organics International, 2019. https://www.organic-world.net/yearbook/yearbook-2019.html

The Pacific Islands

KAREN MAPUSUA[1]

Recent developments

While certification continues to expand across the Pacific and governments are becoming increasingly interested in taking action to create a supportive policy environment, a significant development is that regional and national agencies and development partners are increasingly recognising the value of organic agriculture as a development tool for the Pacific islands context.

An example of this is the project "Building Prosperity for Women Producers through Organic Value Chains" (BWBP), which was launched in 2018. It is a four-year project implemented in partnership with the Pacific Community (SPC), Pacific Organic & Ethical Trade Community (POETCom) and the Australian Department of Foreign Affairs and Trade (DFAT) through the programme "Pacific Women Shaping Pacific Development" (Pacific Women). Pacific Women recognised the potential for organic value chains and mechanisms such as Participatory Guarantee Systems (PGS) to economically and socially empower women. They worked with POETCom to design the project that will work with organic producers, processors, vendors and organic associations with a focus on niche organic products that women can develop. Such niche products promise the best income returns because they sell for premium prices and as such, producers will be able to absorb high trade costs like transportation. Through BWBP, these women will learn business and financial skills, organic agriculture and certification, thereby empowering them by increasing their financial independence within the household.

Market, trade and certification

Most of the organically certified products from the Pacific are for export; however, there are indications of growing local markets through basket (box) schemes, unverified organic claims on labels, PGS development, organic stalls at farmers markets, and increased awareness. Table 78 lists the main products that are currently organically certified in the Pacific.

Table 78: Pacific: Main products that are currently organically certified

Products	Countries
Vanilla, ginger & other spices	Fiji, Vanuatu, Niue, Samoa
Cocoa	Vanuatu, Samoa, PNG
Virgin Coconut Oil	Samoa, Fiji, Solomon Islands, Tonga, Vanuatu
Coconut meal	Vanuatu

[1] Karen Mapusua, Operations Manager Land Resources Division, Pacific Community (SPC), Private Mail Bag, Suva, Fiji, www.spc.int/

Products	Countries
Nonu /noni (Morinda Citrifolia)	Cook Islands, Samoa, Fiji, Niue, French Polynesia
Honey	Niue, Fiji
Bananas (including processed)	PNG, Samoa
Coffee	PNG, Samoa, Vanuatu
Livestock(Beef, Goats and Sheep)	Vanuatu, Fiji
Fruit & Vegetables (including processed)	Fiji, New Caledonia, Samoa, French Polynesia, Cook Islands, Republic of the Marshall Islands
Rum	French Polynesia
Forest nuts	Solomon Islands

As yet, there are no mechanisms for collecting local organic market data. However, growth can be inferred from the growth in PGS certified farms and the number of organic value chains and market opportunities.

PGS models in the Pacific include wild harvest, "whole island", as well as more traditional grower groups. Respect for traditional authorities (chiefs) is strong in the Pacific Islands, and in some cases, traditional governance systems have been embraced to provide support to the guarantee system. Processing and value-adding operations are also certified through the PGS process, and this has created a need to provide considerable upskilling to the PGS members who include processing to manage the more complex inspection requirements.

There are currently 11 PGS approved to use the Organic Pasifika Mark. The number and variety of PGS certified products on local markets and for export is expanding. For example, 2018-19 saw the range grow to include organic manioc flour, peanuts and coffee from Vanuatu, with over 1000 farmers involved in the PGS. The growth of PGS and improved recognition of the value of organics has also contributed to a rise in farmers markets and supply agreements. Samoa, Niue, Cook Islands and Fiji now have certified produce sold through farmers markets, and the Republic of the Marshall Islands has a small amount of certified fresh produce available in selected supermarkets. Fiji also has 135 PGS-certified farmers supplying vegetables to the country's only organic restaurant, Tukuni, established by the Foundation for Rural Enterprises and Development (FRIEND).

Third-party organic certification continues to grow slowly. Each year shows some withdrawals from certification and some new licensees. For some growers of long-term crops such as coconuts, devastation by tropical cyclones makes maintaining certification through the recovery period uneconomical. These issues are likely to be exacerbated under climate change scenarios with more frequent and stronger climate events.

It remains challenging to obtain export data, but in a few instances, central banks publish export data from which - when combined with other market intelligence - we can provide insights. For example, the Central Bank of Samoa published data in 2019 that showed a 3600 percent increase in exports of coconut oil in 12 months and a 400 percent increase in the farm gate price of coconuts. If cross-referenced with other

intelligence, growth can be attributed to the rapid growth in exports from new players in the coconut industry that started to export organic and fair trade copra oil in the previous 12 months. Such a rapid expansion of organic exports cannot be claimed to be widespread across the region, but it does show the potential for some organic value chains.

Legislation

New Caledonia and French Polynesia remain the only territories to have regulated organics. Independent countries in the region have not yet passed organic regulations. The Government of Vanuatu has endorsed its first national organic policy, and the Government of Fiji is now consulting on a draft policy developed by the organic sector in the country and presented to the government – a unique bottom-up approach to policy development.

Government and international support

The Pacific Community as a regional intergovernmental organisation continues to provide support for organics development and houses the POETCom secretariat. POETCom remains predominantly funded through development projects. POETCom national affiliates continue to receive assistance from international NGOs and through bilateral development assistance. In a few cases, national governments provide financial support for organic certification costs as in the case of Samoa and Niue, where the national governments cover certification fees for national grower groups.

Outlook

Development partner support has been secured to review POETCom's structure and design a sustainable funding mechanism to support the organic movement and the Pacific Organic Guarantee Scheme. Opportunities for scaling organics as a response to climate change are growing with development partners more interested in funding programmes of this nature. There is also an expectation that the local market for organic products will continue to expand as tourism and hospitality industries look towards organic and sustainability as part of the Pacific Islands brand.

Links/Further reading

- Pacific Organic and Ethical Trade Community www.organicpasifika.com
- Pacific Organic Standard, http://www.organicpasifika.com/poetcom/wp-content/uploads/sites/2/2014/08/POS.pdf
- Growing Our Future POETCom Strategic Plan 2013 – 2017 http://www.organicpasifika.com/poetcom/wp-content/uploads/sites/2/2014/08/POETCom-Strategic-Plan.pdf
- POETCom Annual Reports http://www.organicpasifika.com/poetcom/who-are-we/annual-reports/
- Pacific Organic Policy Toolkit http://www.organicpasifika.com/pasifikapolicytoolkit/

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Oceania: Current statistics

JAN TRÁVNÍČEK[1], BERNHARD SCHLATTER[2], JULIA LERNOUD[3] AND HELGA WILLER[4]

In 2018, the organic agricultural land in Oceania was 36.0 million hectares, which constituted 8.6 percent of the total agricultural area in the region. Half of the world's organic agricultural land is in Oceania. The area under organic production has increased almost seven fold since 2000 (5.3 million hectares). Between 2017 and 2018, the area in Oceania grew by over 105′000 hectares – 0.3 percent more - due to a growth of the organic agricultural area in Australia (almost 43′000 hectares, 0.1 percent growth), Papua New Guinea (nearly 36'000 hectares more, over 262 percent) and Fiji (over 24′500 hectares more, 148 percent growth) showed an important growth. The country with the biggest organic agricultural area is Australia with 35.7 million hectares, and the highest organic share of total agricultural land is in Samoa, with 34.5 percent of all farmland under organic cultivation, followed by Australia with 8.8 percent.

Land use

It is estimated that in 2018, more than 96 percent of all organic farmland in Oceania was grassland/grazing areas (34.7 million hectares, mainly in Australia). Detailed data on crop was not available for Australia, the country with the largest area. However, it was available for all other countries. From the available data, we can assume that permanent crops play an important role in the Pacific region. Coconut is the largest grown commodity (over 127'000 hectares, 24 percent of the total region's coconut area) in the Pacific Islands, mainly for oil production. Furthermore, coffee (over 24'000 hectares) is also largely grown.

Producers

There were almost 21'000 organic producers in the region, with the largest number of producers in Papua New Guinea (almost 12'800 producers), Samoa (over 2′000 producers), and Australia (over 1′800 producers). Since 2006, when data for most of the countries became available, their number has almost trebled.

Market

For 2018, the total organic market was almost 1.4 billion euros for the region. Australia reported an organic market of 1.2 billion euros and New Zealand retail sales value 155 million euros. For the other countries in the region, no data is available. The annual organic consumption was 49 euros per person in Australia and 33 euros per person in New Zealand. For more information, see the data tables on page 292.

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

Organic Agriculture in Oceania: Graphs

Oceania: Organic agricultural land by country 2018
Source: FiBL survey 2020

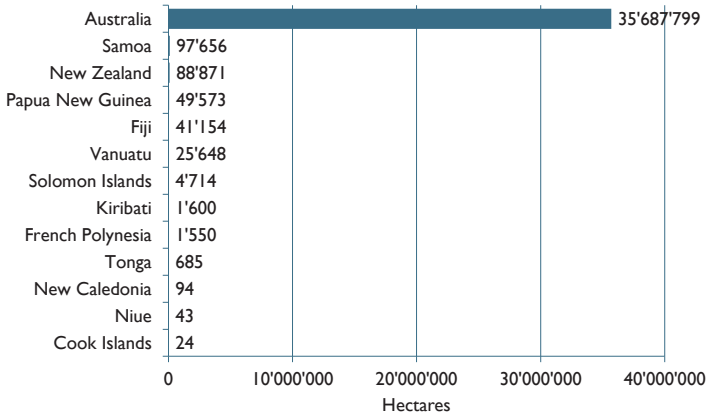

Figure 104: Oceania: Organic agricultural land by country 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Oceania: Organic share of total agricultural land by country 2018
Source: FiBL survey 2020

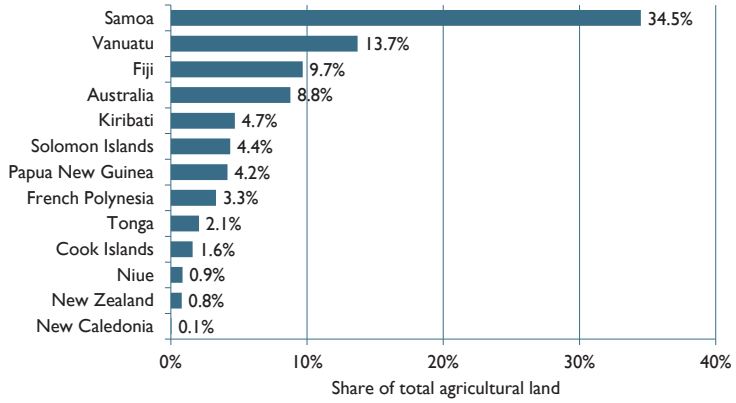

Figure 105: Oceania: Organic share of total agricultural land by country 2018

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Oceania: Development of organic agricultural land 1999-2018

Source: FiBL-IFOAM-SOEL-Surveys 2001-2020

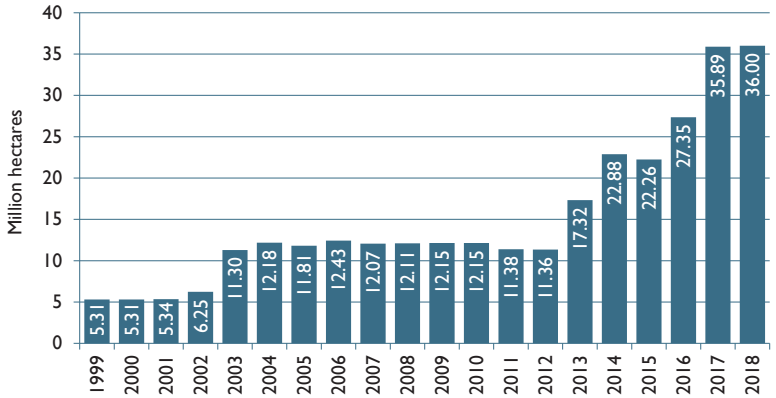

Figure 106: Oceania: Development of organic agricultural land 1999-2018

Source: FiBL-IFOAM-SOEL 2001-2020; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Organic Agriculture in Oceania: Tables

Table 79: Oceania: Organic agricultural land, organic share of total agricultural land, and number of producers 2018

Country	Area [ha]	Share of total agr. land [%]	Producer [no.]
Australia	35'687'799	8.8%	1'829
Cook Islands	24	1.6%	58
Fiji	41'154	9.7%	67
French Polynesia	1'512	3.3%	13
Kiribati	1'600	4.7%	900
New Caledonia	94	0.1%	131
New Zealand	88'871	0.8%	876
Niue	43	0.9%	1
Papua New Guinea	49'573	4.2%	12'742
Samoa	97'656	34.5%	2'038
Solomon Islands	4'714	4.4%	1'098
Tonga	685	2.1%	1'060
Vanuatu	25'648	13.7%	47
Total	**35'999'373**	**8.6%**	**20'860**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Table 80: Oceania: All organic areas 2018

Country	Agriculture [ha]	Wild collection [ha]	Total [ha]
Australia	35'687'799		35'687'799
Cook Islands	24		24
Fiji	41'154	653	41'807
French Polynesia	1'512		1'512
Kiribati	1'600		1'600
New Caledonia	94		94
New Zealand	88'871		88'871
Niue	43	112	155
Papua New Guinea	49'573		49'573
Samoa	97'656		97'656
Solomon Islands	4'714		4'714
Tonga	685		685
Vanuatu	25'648		25'648
Total	**35'999'373**	**765**	**36'000'138**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Table 81: Oceania: Land use in organic agriculture 2018

Land use	Crop group	Area [ha]
Arable crops	Arable crops, other	94
	Cereals	41'293
	Fresh vegetables and melons	3'927
	Medicinal and aromatic plants	11'713
	Sugarcane	7
Arable crops total		***57'034***
Cropland, no details		**41'827**
Other agricultural land		**999'692**
Permanent crops	Cocoa	1'935
	Coconut	127'451
	Coffee	24'182
	Fruit	4'567
	Fruit, tropical and subtropical	20'412
	Grapes	7'503
	Medicinal and aromatic plants, permanent	10'650
	Tea/mate, etc.	487
	Permanent crops, other	20'063
Permanent crops total		***217'250***
Permanent grassland		**34'683'571**
Total		**35'999'373**

Source: FiBL survey 2020, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 315

Achievements and Outlook

Worldwide Organic Outlook - Improving Data, Engaging Citizens, and Implementing Smart Policies

LOUISE LUTTIKHOLT[1]

Good data is one foundation for the development of organic agriculture. That is why the yearly "The World of Organic Agriculture" statistics book is so important. Acreages, sales numbers, and turnover are important, yet only tell part of the story. Equally important is the context in which we look at the data. And the context and narrative are changing.

Growing societal awareness

The "We Are Fed Up" demonstration held at the International Green Week in Germany, the 'Fridays for Future' demonstrations, and the protests against the fires in the Amazon show that citizens do not want to be reduced to consumers sitting on the side-lines. They care about the environment and want to safeguard it for future generations.

Given the state of our Earth, we can no longer afford to discuss questions like "can organic feed the world?" when we should be asking, if anything, why the industrial model of agriculture is not feeding the world. Instead, we should be highlighting what works, namely food systems that provide sufficient and nutritious food for all, minimise environmental impacts, and enable producers to earn a decent living. Food systems should benefit the public good, i.e. positively contribute to the Sustainable Development Goals, and help us live within our planetary boundaries. Here, organic agriculture has proven to be a valuable tool in policy-making as it balances and optimises several 'goods' without adding to the "public bads".

Challenges to overcome

It is discouraging to see research money spent on the hypothetical question of what happens to greenhouse gas (GHG) emissions if country XY transitions to 100% organic. Such studies assume that all conditions like meat consumption and food waste remain constant and draw the conclusion that organic yields less harvest, therefore requiring the need to import products, which increases GHG emissions. The effects on biodiversity or water are not taken into account. Research money could instead be used to see how organic practices can be improved – indeed there is still improvement needed – for the benefit of *all* farmers and of *all* consumers.

[1] Louise Luttikholt, Executive Director, IFOAM - Organics International, 53113 Bonn, Germany, www.ifoam.bio

Smart policies: Crucial and viable

Given the influence agriculture and food-related policies can have on farming and business practices, costs, prices, and consumer choice, they can either perpetuate the status quo or pave the way to more sustainability. The publication 'Sustainability in Global Agriculture Driven by Organic Farming' shows how smart policies can trigger the required transition to true sustainability in agriculture.

Fortunately, the shift from competing narratives to a collaborative strategy has already begun. UN institutions are increasingly recognising the role of agroecology as a science, a practice, and a social movement that contributes to making agriculture and food systems more sustainable. At the Committee of World Food Security's FAO meeting last October, represented countries expressed overwhelming support for the 'Scaling up Agroecology' initiative. Except for a few countries, such as the USA, world leaders understand the multi-dimensional benefits that organic delivers.

This shift is pushed by honest conversations from citizens in their roles as voters. They understand how current chemical-based agriculture is causing more environmental harm than good. And many are puzzled by the fact that it is financially more advantageous to harm the environment, exploit people, and negatively affect health than it is to protect and enhance natural resources and strive for the well-being of our society.

Reaching new audiences

We are honoured to support these conversations through our global campaigns, like 'Honest Food' (www.honestfood.bio). This campaign highlights that Honest Food is food with nothing to hide and is our way to reach those individuals who may not yet speak our language. By communicating clearly on the positive contributions of organic agriculture, we can build new partnerships and together create greater awareness of how organic agriculture is part of the solution.

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Annex

Key Indicators by Country and Region

Table 82: Key indicators by region 2018

Region	Organic area [ha]	Shares of the global organic farmland area [%]	Organic share of total farmland area [%]	Growth 2017-2018 [%]	Organic producers [no.]	Organic retail sales [Million €]
Africa*	2'003'976	3%	0.2%	+0.2%	788'858	17
Asia	6'537'226	9%	0.4%	+8.9%	1'317'023	10'071
Europe	15'635'505	22%	3.1%	+8.7%	418'610	40'729
Latin America	8'008'581	11%	1.0%	+0.2%	227'609	810
North America	3'335'002	5%	0.8%	+3.5%	23'957	43'677
Oceania	35'999'373	50%	8.6%	+0.3%	20'859	1'378
World**	**71'514'583**	**100%**	**1.5%**	**2.9%**	**2'796'916**	**96'683**

Source: FiBL survey 2020. Note: Agricultural land includes in-conversion areas and excludes wild collection, aquaculture, forest, and non-agricultural grazing areas.
**Data from Ethiopia and Kenya. **Includes correction value for French overseas departments.*

Table 83: Key indicators by country 2018

Country	Organic area [ha]	Organic share [%]	Organic producer [no.]*	Organic retail sales [Million €]
Afghanistan	786	0.002%	10	
Albania	747	0.1%	82	
Algeria	772 (2017)	0.002%	64 (2016)	
Andorra	2	0.01%	1	
Argentina	3'629'968	2.4%	1'366	
Armenia	694	0.04%	35	
Australia	35'687'799	8.8%	1'829	1'224
Austria	637'805	24.7%	25'795	1'810
Azerbaijan (2015)	37'630	0.8%	305	3
Bahamas (2016)	49	0.3%	1	
Bangladesh	504	0.01%	9'335 (2011)	
Belarus	1'656	0.02%	24	
Belgium	89'025	6.8%	2'264	698
Belize	220	0.1%	150	0.1 (2015)
Benin	16'454	0.4%	4'030 (2017)	
Bermuda				Processing
Bhutan	6'632	1.3%	4'354	0.03
Bolivia (2014)	114'306	0.3%	12'114	
Bosnia and Herzegovina	896	0.04%	251	0.4 (2017)
Botswana			2	
Brazil	1'188'255	0.4%	17'508	778 (2017)
Brunei Darussalam				Aquaculture
Bulgaria	162'332	3.5%	6'471 (2017)	29 (2017)
Burkina Faso (2017)	56'663	0.5%	26'627	
Burundi	164	0.01%	16	
Cambodia	27'550	0.5%	5'788	

Country	Organic area [ha]	Organic share [%]	Organic producer [no.]*	Organic retail sales [Million €]
Cameroon	1'089	0.01%	499	
Canada	1'311'572	2.0%	5'791	3'119
Cape Verde	495	0.6%	1	
Chad			1	
Channel Islands (2016)	180	1.9%		
Chile	16'305	0.1%	1'609	2 (2009)
China	3'135'000	0.6%	6'308 (2016)	8'087
Colombia	22'314	0.0%	3'496	
Comoros	2'142	1.6%	680	
Cook Islands	24	1.6%	58	
Costa Rica	8'964 (2010)	0.5%	50 (2017)	1 (2008)
Côte d'Ivoire	50'574	0.2%	2'776 (2017)	
Croatia	103'166	6.6%	4'374	99
Cuba	6'181	0.1%	510 (2016)	
Cyprus	6'022	5.4%	1'249	2 (2006)
Czech Republic	538'894	12.8%	4'601	127 (2017)
Congo, D.R.	60'624 (2017)	0.2%	30'170	
Denmark	256'711	9.8%	3'637 (2017)	1'807
Dominica (2011)	240	1.0%		
Dominican Republic	169'026 (2016)	7.2%	16'119	
Ecuador	41'793	0.7%	12'912	
Egypt	116'000	3.1%	970	
El Salvador	1'679	0.1%	380	
Estonia	206'590	21.6%	1'948	42 (2017)
Eswatini	186	0.02%	2	
Ethiopia	186'155	0.5%	203'602	13
Falkland Islands (Malvinas)	31'937	2.9%	4	
Faroe Islands	251	8.4%	1	
Fiji	41'154	9.7%	67	
Finland	297'442	13.0%	5'129	336
France	2'035'024	7.3%	41'632	9'139
French Guiana (France)	3'103	10.1%	75	
French Polynesia	1'512	3.3%	12	
Gambia	20	0.003%	1 (2017)	
Georgia (2015)	1'452	0.1%	1'075	
Germany	1'521'314	9.1%	31'713	10'910
Ghana	29'663	0.2%	3'228 (2017)	
Greece	492'627	6.0%	29'594	66 (2017)
Grenada	84	1.1%	23	
Guadeloupe (France)	272	0.5%	63	
Guatemala (2014)	14'000	0.4%	6'346	
Guinea (2017)	10	0.0001%	1	
Guinea-Bissau	835	0.1%	1	
Guyana				Wild collection
Haiti	4'403	0.2%	4'661	
Hong Kong				Processing
Honduras (2017)	29'274	0.9%	6'023	

Country	Organic area [ha]	Organic share [%]	Organic producer [no.]*	Organic retail sales [Million €]
Hungary	209'382	4.5%	3'929	30 (2017)
Iceland	24'855	1.3%	29	
India	1'938'221	1.1%	1'149'371	186 (2017)
Indonesia	251'631	0.4%	18'162 (2017)	
Iran (Islamic Republic of)	11'916 (2017)	0.03%	20	
Iraq	63	0.001%		
Ireland	118'699	2.4%	1'725 (2017)	206 (2017)
Israel	6'666	1.2%	349	
Italy	1'958'045	15.8%	69'317	3'483
Jamaica	374	0.1%	127	1
Japan	10'792	0.2%	3'678	1'419
Jordan (2017)	1'446	0.1%	23	
Kazakhstan	192'134	0.1%	63	
Kenya	154'488	0.6%	37'295	4
Kiribati (2017)	1'600	4.7%	900	
Kosovo	160 (2015)	0.04%	150	
Kuwait	22	0.01%	1	
Kyrgyzstan	22'118	0.2%	1'107 (2017)	
Lao P.D.R.	7'668 (2016)	0.3%	1'342 (2011)	
Latvia	280'383	15.4%	4'178 (2017)	51 (2017)
Lebanon	1'241	0.2%	111	
Lesotho	1	0.00004%	3	
Liberia	2	0.0001%		
Liechtenstein	1'413	38.5%	46	
Lithuania	239'691	8.3%	2'476	51 (2017)
Luxembourg	5'782	4.4%	103	135
Madagascar	48'757	0.1%	32'367	
Malawi	12'399	0.2%	295	
Malaysia	9'576	0.1%	29	
Maldives				
Mali (2017)	12'655	0.03%	12'272	
Malta	47	0.5%	19	
Martinique (France)	398	1.3%	64	
Mauritania				Wild collection
Mauritius	3	0.003%	22	
Mayotte	35	0.3%	3	
Mexico	183'225	0.2%	27'000	14
Moldova	17'151	0.7%	135	
Monaco				Processing
Mongolia	636	0.001%	13	
Montenegro	4'455	1.9%	328	0
Morocco	9'917	0.03%	277	
Mozambique	14'933	0.03%	269	
Myanmar	12'305	0.1%	48	
Namibia	66	0.0002%	8	
Nepal	11'851	0.3%	1'622	
Netherlands	57'904	3.1%	1'696 (2017)	1'287

Country	Organic area [ha]	Organic share [%]	Organic producer [no.]*	Organic retail sales [Million €]
New Caledonia	94 (2017)	0.1%	131	
New Zealand	88'871	0.8%	876	155
Nicaragua	34'787	0.7%	8'193	
Niger (2017)	254	0.001%	2	
Nigeria	57'117	0.1%	1'091	
Niue	43	0.9%	1	
North Macedonia	4'409	0.3%	775	
Norway	46'377	4.7%	2'057	423
Oman	43 (2015)	0.003%	5 (2013)	
Pakistan	64'885	0.2%	415	
Palestine	4'870	1.6%	1'440 (2017)	
Panama	5'929	0.3%	18	
Papua New Guinea	49'573	4.2%	12'742	
Paraguay	42'818	0.2%	5'187	
Peru	311'461	1.3%	103'554	14
Philippines	218'570	1.8%	12'366	
Poland	484'676	3.4%	19'224	250
Portugal	213'118	5.9%	5'213	21
Puerto Rico (2016)	14	0.01%	5	
Republic of Korea	24'700	1.4%	15'500	330 (2017)
Réunion (France)	1'272	2.6%	306	
Romania	326'260	2.5%	7'908 (2017)	41 (2016)
Russian Federation	606'975	0.3%	40	160
Rwanda	2'130	0.1%	3'870	
Samoa	97'656	34.5%	2'038	
San Marino				Processing
Sao Tome and Principe	10'934	22.5%	3'564	
Saudi Arabia	18'631	0.01%	6	
Senegal (2013)	7'989	0.1%	18'369	
Serbia	19'255	0.5%	373	
Seychelles			1	
Sierra Leone	99'238	2.5%	304	
Singapore	3	0.4%		16 (2017)
Slovakia	188'986	10.0%	439 (2017)	4 (2010)
Slovenia	47'848	9.9%	3'738	49
Solomon Islands	4'714	4.4%	1'098	
Somalia				Wild collection
South Africa	82'818	0.1%	237	
Spain	2'246'475	9.6%	39'505	1'903 (2017)
Sri Lanka	77'169	2.8%	1'416	
Sudan	76'941	0.1%	3	
Suriname	94	0.1%	39	
Sweden	608'758	19.9%	5'801 (2017)	2'301
Switzerland	160'992	15.4%	7'032	2'655
Syrian Arab Republic (2010)	19'987	0.1%	2'458	
Taiwan	8'759	1.1%	3'556	
Tajikistan	8'806	0.2%	953	

Country	Organic area [ha]	Organic share [%]	Organic producer [no.]*	Organic retail sales [Million €]
Tanzania	278'467 (2017)	0.7%	148'610 (2013)	
Thailand	95'066	0.4%	58'490	12
Timor-Leste	63'882	16.8%	4	
Togo (2017)	41'323	1.1%	38'414	
Tonga	685	2.1%	1'060	
Tunisia	306'467 (2017)	3.0%	7'456	
Turkey	646'247	1.7%	79'563	46
Uganda (2016)	262'282	1.8%	210'352	
Ukraine	309'100	0.7%	501	33
United Arab Emirates (2017)	4'687	1.2%	95	
United Kingdom	457'377	2.7%	3'544	2'537
United States of America	2'023'430	0.6%	18'166 (2017)	40'559
US Virgin Islands (2016)	26	0.7%		
Uruguay	2'147'083	14.9%	12	
Uzbekistan	943	0.004%	1	
Vanuatu	25'648	13.7%	47	
Venezuela				Processing
Viet Nam	237'693	2.2%	17'169	18
Zambia	1'228	0.01%	286	
Zimbabwe	415	0.003%	511	
World*	**71'514'583**	**1.5%**	**2'796'916**	**96'683**

Source: FiBL survey 2020, based on data from governments, the private sector, and certifiers. For retail sales data: FiBL-AMI- survey 2020, based on data from government bodies, the private sector, and market research companies. For detailed data sources see annex, page 315
**Total number includes data for countries with less than three operators.*

Data Providers and Data Sources

Compiled by Helga Willer[1]

Afghanistan

Certifier data.

Albania

Source

› Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat, Istituto Agronomico Mediterraneo di Bari (CHEAM Bari), Bari, Italy

Algeria

Source

› Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat, Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy. The data is from 2017.

Andorra

Source

› Ecocert Iberica, Sevilla, Spain

Contact

› Celia Carave Blanco, Ecocert Iberica, Sevilla, Spain

Argentina

Source

› Land use/operator/production/export volume data: SENASA, 2019 "Situación de la Producción Orgánica en la Argentina durante el año 2018". Buenos Aires. In addition, further data was provided by SENASA, www.senasa.gov.ar
› Export value data is from 2009.

Contact

› Juan Carlos Ramirez and Diego Pinasco, SENASA, Buenos Aires, Argentina, www.senasa.gob.ar
› Facundo Soria, Ministerio de Agricultura Ganadería y Pesca (MAGYP), Buenos Aires, Argentina, http://www.alimentosargentinos.gob.ar/HomeAlimentos/Organicos/

Armenia

Source

› Survey of Ecoglobe - Organic control and certification body, Yerevan, Republic of Armenia, www.ecoglobe.am

Contact

› Nune Darbinyan and Eliza Petrosyan, Ecoglobe - Organic control and certification body, Yerevan, Republic of Armenia, www.ecoglobe.am.

Australia

Source

› Australian Organic (2019): Market Report 2019. Australian Organic, Nundah
› Land use and crop data from 2017. Source: Australian Bureau of Statistics ABS, provided by Els Wynen.[2]

Contact

› Niki Ford, Australian Organic, Nundah, Australia
› Harriet Kendrick, Australian Organic, Nundah, Australia

Austria

Sources

› Area, land use and farms: Bundesministerium für Nachhaltigkeit und Tourismus , Vienna, Austria
› Operators: Eurostat database, Eurostat, Luxembourg
› Retail sales: RollAMA based on GfK, AMA-Marketing, Agrarmarkt Austria Marketing GesmbH, Vienna, Austria
› Export data are from 2011 and were compiled by the Organic Retailers Association (ORA).

Contact

› Otto Hofer, Federal Ministry of Agriculture, Forestry, Environment and Water Management (AT), Vienna, Austria
› Barbara Köcher-Schulz, AMA-Marketing GesmbH AMA, Vienna, Austria
› Pia Reindl, AMA-Marketing GesmbH AMA, Vienna, Austria

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

[2] See Wynen, Els (2019): Organic Australia in 2010/11 and 2015/16. In: Willer, Helga and Julia Lernoud (Eds.) (2019): The World of Organic Agriculture. Research Institute of Organic Agriculture FiBL, Frick, and IFOAM – Organics International, Bonn. Available at https://www.organic-world.net/yearbook/yearbook-2019.html

Azerbaijan

Source

› Experimental and Resource Center affiliated to the Azerbaijan Botanic Center, Ganja, Azerbaijan, www.etkt.az. The data is from 2015.

Contact

› Dr. Vugar Babayev, Ganja Agribusiness Association (GABA), Ganja, Azerbaijan, www.etkt.az.

Bahamas

› Certifier data.

Bangladesh

Source

› Data were provided by the Asian Productivity Organization (APO) and Bangladesh Agricultural Research Institute (BARI), all certifiers active in the country were covered. The certified organic area is 6284.9 hectares. Aquaculture (shrimp) accounts for the major share (5781 hectares) of the certified area while the rest (503.9 hectares) is covered by organic tea.According to these two institutions, there are an additional 152'240 hectares under non-certified organic production
› Previous data from the Horticulture Export Development Foundation, Dhaka, Bangladesh, www.hortex.org (from 2012) were removed from the database for the years after 2016.
› Please note that due to the changing data sources a direct year-to-year comparison is not possible for Bangladesh.

Contact

› Dr. Tanveeer, Hossein Shaik, Asian Productivity Organization (APO), Tokyo, Japan
› Dr. Alam Khurshid, Bangladesh Agricultural Research Institute (BARI), Bangladesh

Belarus

Source

› Center for Environmental Solutions (CES), 220029 Minsk, Belarus

Contact

› Lyubomyr Klepach, Center for Environmental Solutions (CES), 220029 Minsk, Belarus

Note

The data7 is based on a survey among the international certifiers active in the country. The Center for Environmental Solutions provided both 2017 and 2018 data.

Belgium

Sources

› Area and operator data: Landbouw en Visserij, Brussels, Belgium
› Livestock data: Eurostat database, Eurostat, Luxembourg and Landbouw en Visserij, Brussels, Belgium
› Retail sales: Landbouw en Visserij, Brussels, Belgium

Contact

› Ilse Timmermans, Landbouw en Visserij, Brussels, Belgium

Belize

Source

› Certifier data.

Note

› Please note that the data source has changed and that therefore a direct year-to-year comparison is not possible.

Benin

Source

› Survey among certifiers; not all certifiers provided updated data.

Contact

› Laurent C. Glin, Sikasso, République du Mali

Bermuda

› Certifier data. (Processing)

Bhutan

Source

› Ministry of Agriculture (MOA), National Organic Programme DOA, Thimphu, Bhutan, www.moa.gov.bt

Contact

› Kesang Tshomo and Kinga Iham, Ministry of Agriculture MOA, National Organic Programme DOA, Thimphu, Bhutan, www.moa.gov.bt.

Bolivia

Source

› Survey of the Bolivian Association of Organic Producers Organisations – AOPEB. The data is from 2014.

Bosnia Herzegovina

Source

› Organska Kontrola, Sarajevo, Bosnia & Herzegovina

Contact

› Dino Beširević, Organska Kontrola, Sarajevo, Bosnia & Herzegovina

Brazil

Sources

Area and operator data: Ministério da Agricultura, Pecuária e Abastecimento/Ministry of Agriculture, Livestock and Food (MAPA). To this data the area and operator data of two international certifiers were added by FiBL. The data of these certifiers are currently not registered under the system of the MAPA. For MAPA data see Table 84.

› Please note that landuse and crop details were available only from the international certifiers and not for the total organic farmland.
› Retail sales data: Organic Brasil (2017 data)

Contact

› Virgínia Mendes Cipriano Lira, Ministério da Agricultura, Pecuária e Abastecimento (DTEC/SDA/MAPA), Coordenadora de Produção Orgânica – CPO, Brasilia, Brazil

Brunei Darussalam

› For Brunei Darussalam, aquaculture data from 2016 are available.

Source

› Ecocert China, Beijing, China

Contact

› Lisha Zheng, Ecocert China, Beijing, China

Bulgaria

Sources

› Land area, operators: Eurostat and data from the Bulgarian Ministry of Agriculture provided by FOA Bioselena, Karlovo, Bulgaria. www.bioselena.com
› Domestic market data (from 2017): Boshnakova, Mila (2018): Bulgaria: Organic Market Update. GAIN Report Number BU1811. USDA, Foreign Agricultural Service, Washington

Contact

› Dr. Stoilko Apostolov, FOA Bioselena, Karlovo, Bulgaria. www.bioselena.com

Burkina Faso

Sources

The data were compiled by FiBL based on the data of the following international certifiers.

› CERTISYS, B-1150 Bruxelles, Belgium, www.certisys.eu.
› Control Union, Zwolle, The Netherlands, www.controlunion.org
› Ecocert West Africa, Ougadougou, Burkina Faso
› LACON GmbH, Moltkestraße 4, Offenburg, Germany

All data are from 2017.

Contact

› Emmeline Foubert, CERTISYS, 1150 Bruxelles, Belgium, www.certisys.eu.
› Ditta Fetekene, Control Union, Zwolle, The Netherlands, www.controlunion.org

Burundi

› Ecocert East Africa, Antananarivo, Madagascar

Contact

› Brayene Ramanantsoa, Ecocert East Africa, Antananarivo, Madagascar

Cambodia

Source

› Certifier data.

Cameroon

Source

› Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com Ecocert, L'Isle Jourdain, France, www.ecocert.com. The data is from 2017.

Canada

Source

› Land area, producers and other operator types, market data: Survey of the Canada Organic Trade Association (COTA), Ottawa, Canada, based on information of the certifiers.

Contact

› Diana Zeidan, Special Projects Coordinator, Canada Organic Trade Association, Ottawa, Canada, http://ota.com/otacanada.html

Note

› See also article about organic farming in Canada in this and in previous editions of "The World of Organic Agriculture."

Cape Verde

Certifier data. The data is from 2017.

Chad

Certifier data. Not all certifiers provided updated data.

Channel Islands

Source

› FAOSTAT (2016) Organic area data Channel Islands. The FAOSTAT website, FAOSTAT, Rome, Italy, FAOSTAT > Agri-Environmental Indicators> Inputs. The data is from 2016.

Chile

Source

› Area data, producers/ smallholders, livestock and export data: Servicio Agrícola y Ganadero (SAG) Santiago, Chile, www.sag.gob.cl, provided via Comisión Interamericana de

Agricultura Orgánica (CIAO), Buenos Aires, Argentina
› Domestic market data (2009) according to USDA: Organic Products Report Chile. GAIN Report Number CI0031. November 30, 2010

Contact

› Pilar M. Eguillor Recabarren, Oficina de Estudios y Políticas Agrarias (ODEPA), Ministerio de Agricultura, Teatinos 40, Santiago, Chile, www.odepa.gob.cl.
› Claudio Cárdenas Catalán, Servicio Agrícola y Gandero (SAG), Ministerio de Agricultura, Santiago, Chile, http://www.sag.cl

China

Sources

› Land area, operators, market and export data; Chinese Agricultural University, Beijing, China

Contact

› Yuhui Qiao, Chinese Agricultural University, Beijing, China
› Zejiang Zhou, President, Board of IFOAM Asia, China

Colombia

Source

› Total area and operator data: Ministry of Agriculture and Rural Development (Ministerio de Agricultura y Desarrollo Rural), Bogotá, Columbia. Please note that based not he data from the ministry, the 2017 data (published in "The World of Organic Agriculture 2019) were revised.
› Land use and crop data were provided ECONEXOS, Conexion Ecologica, Cali, Colombia, www.econexos.com, based on a survey among the certifiers. The land use and crop data is from 2014.

Contact

› Carlos Escobar, ECONEXOS - Desarrollo en Movimiento, Cali, República de Colombia, www.econexos.com.

Note

The data collection official system from the Ministry of Agriculture only shows information about the area, products, etc certified according to the to national standard. This means that if an operator has e.g. only EU certification, this data is not included into this system. If tan operator has EU certification + national certification, the data is included. It might therefore be that the organic area in Colombia is higher.

Comoros

Source

› Ecocert East Africa, Antananarivo, Madagascar

Contact

› Brayene Ramanantsoa, Ecocert East Africa, Antananarivo, Madagascar

Congo, Democratic Republic of

Certifier data.

Cook Islands

Source

› Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int.

Contact

› Karen Mapusua, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

Costa Rica

Source

› Land area, operators and export volume data: Servicio Fitosanitario del Estado (2018): Programas Especiales/ Agricultura Orgánica. Estadísticas 2018. M.A.G Costa Rica, San José.
› Export value (2009 data) PROMOCER (2011): Costa Rica: exportaciones de productos orgánicos según destino.
› Domestic market data (2008) were provided by the organic sector organization MAOCO.

Côte d'Ivoire

Sources

The data were compiled by FiBL based on the data of the following international certifiers:
› CERTISYS, B-1150 Bruxelles, Belgium
› Control Union, Zwolle, The Netherlands, www.controlunion.org
› Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com
› ICEA, Bologna, Italy

Not all certifiers provided updated data.

Contact

› Emmeline Foubert, CERTISYS, 1150 Bruxelles, Belgium, www.certisys.eu.
› Ditta Fetekene, Control Union, Zwolle, The Netherlands, www.controlunion.org
› Nohoun Barro, Ecocert SA West Africa Office, Ougadougou, Burkina Faso

Croatia

Sources

› Area and operators: Eurostat database organic farming, Eurostat, Luxembourg and Mediterranean Organic Agriculture Network MOAN, Bari, Italy

› Market (from 2014) & export data (from 2011): Darko Znaor, Independent Consultant, 10000 Zagreb, Croatia

Contact

› Darko Znaor, Independent Consultant, 10000 Zagreb, Croatia

Cuba

Certifier data.

Cyprus

Source

› Land area and producer data: Department of Agriculture, Nicosia, Cyprus
› Production data: Eurostat database, Eurostat, Luxembourg
› Market data (from 2006): Organic Retailers Association, Ecozept and Biovista (eds.) (2008): Specialised Organic Retail Report 2008. Freising and Vienna 2008

Contact

› Andreas Selearis, Department of Agriculture, Nicosia, Cyprus

Czech Republic

Source

› Area, operators, market and international trade data: Institute of Agricultural Economics and Information (UZEI), Department of Agri-environmental Policy, 602 00 Brno, Czech Republic. The market and international trade data are from 2017.

Contact

› Hana Šejnohová, Institute of Agricultural Economics and Information (UZEI), Department of Agri-environmental Policy, Brno, Czech Republic
› Andrea Hrabalová, Brno, Czech Republic

Denmark

Sources

› Land area, land use, Operators: Eurostat database, Eurostat, Luxembourg
› Retail sales: Landbrug & Fødevarer. Based on data from Statistics Denmark (general retail sales) and Organic Denmark (for other marketing channels)
› Food service and exports: Statistics Denmark.

Contact

› Martin Lundoe, Statistics Denmark, Copenhagen, www.statbank.dk
› Ejvind Pedersen, Danish Agriculture & Food Council, Agro Food Park 13, 8200 Aarhus N, Denmark

Dominica

Source

› Division of Agriculture provided by Dominica Organic Agriculture Movement (DOAM) Inc., PO Box 1953 - Roseau, Commonwealth of Dominica.

The data is from 2011.

Dominican Republic

Source

› Secretaria de Estado de Agricultura, Oficina de Control Orgánico, Santa Domingo, Dominican Republic, www.agricultura.gob.do. Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina

Contact

› Leandro Duarte Nina Fortuna, Director Oficina de Control de la Agricultura Orgánica, ViceMinisterio de Extensión y Capacitación Agropecuarias. Ministerio de Agricultura, Santa Domingo, Dominican Republic, www.agricultura.gob.do.

Ecuador

Source

› Land area, operators, exports: Agrocalidad, Quito Ecuador, www.agrocalidad.gob.ec

Contact

› Rommel Aníbal Betancourt Herrera, Agrocalidad, Quito, Ecuador

Egypt

Source

› Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy

El Salvador

Source

› Ministerio de Agricultura y Ganadería, Final 1a. Avenida Norte, 13 Calle Poniente y Avenida Manuel, Gallardo, Santa Tecla, El Salvador

Contact

› Jose Fernando Maldonado Cestona, Coordinador Area de Inocuidad de Alimentos y Agricultura Orgánica Ministerio de Agricultura y Ganadería Dirección General de Sanidad Vegetal, El Salvador

Estonia

Sources

› Land area, land use, operators: Organic Farming in Estonia 2018. Compiled by the Estonian Organic Farming Foundation based

on Ministry of Agriculture, Republic of Estonia, Tallin and Eurostat database, Eurostat, Luxembourg
› Retail sales data (2017): Estonian Institute of Economic Research, Estonia
› Export data: Estonian Ministry of Agriculture
› A detailed report about organic farming in Estonia can be found at http://www.maheklubi.ee/mison/eestis/

Contact

› Merit Mikk, Centre of Ecological Engineering, Tartu, Estonia

Eswatini

Certifier data

Ethiopia

Source

› Ethiopian Institute of Agricultural Research, Akaki, Ethiopia. The data is from 2015.

Contact

› Addisu Alemayeh Ferede, Ethiopian Institute of Agricultural Research, Akaki, Ethiopia

Falkland Islands/Malvinas

Source

› Department of Agriculture, Bypass Road, Stanley, Falkland Islands, www.agriculture.gov.fk.

Contact

› Lucy Ellis, Department of Agriculture, Bypass Road, Stanley, Falkland Islands, www.agriculture.gov.fk

Faroe Islands

Source

› Vottunarstofan Tún ehf, Laugavegur 7, 101 Reykjavík, Iceland, www.tun.is.

Contact

› Rannveig Guðleifsdóttir, Vottunarstofan Tún ehf., Reykjavík, Iceland, www.tun.is

Fiji Islands

Sources

› Pacific Organic and Ethical Trade Community (POETCom), Suva, Fiji, www.spc.int

Contact

› Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom), Suva, Fiji

Finland

Sources

› Land area: The Finnish Food Safety Authority Evira, Finland.
› Operators: Eurostat database, Eurostat Luxembourg.
› Market data: Pro Luomu, Kauniainen, Finland
› Export data: Pro Luomu, Kauniainen, Finland. The total exports are estimated at 25 to 30 million euros

Contact

› Marja-Riitta Kottila, Pro Luomu, Kauniainen, Finland

France

Source

› Area and operators: Agence Bio, Montreuil-sur-Bois, France. www.agencebio.org, and Eurostat database, Eurostat Luxembourg
› Retail sales: Agence Bio, Montreuil-sur-Bois, France
› Export and import data (2017): Agence Bio, Montreuil-sur-Bois, France

Contact

› Eva Lacarce, Agence Bio, Montreuil-sous-Bois, France, www.agencebio.fr

French Guyana

Source

› Agence Bio, Montreuil-sur-Bois, France. www.agencebio.org.

Contact

› Eva Lacarce, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

French Polynesia

Source

› Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int.

Contact

› Karen Mapusua, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

Gambia

Certifier data.

Georgia

Source

› Elkana Survey, Elkana, 16 Gazapkhuli street, 0177 Tbilisi, Georgia, www.elkana.org.ge. The data is from 2015.

Contact

› Elene Shatberashvili, Biological Farming Association Elkana, 16 Gazapkhuli street, 0177 Tbilisi, Georgia, www.elkana.org.ge

Germany

Sources

› Area and operator data: Federal Agency for Agriculture BLE, Bonn, Germany
› Crop and livestock details: Agrarmarkt Informations-Gesellschaft mbH (AMI), Bonn, Germany, www.ami-informiert.de.
› Retail sales: Arbeitskreis Biomarkt (Working group organic market), coordinated by AMI

based on data of GfK, Nielsen, bioVista und Klaus Braun Kommunikationsberatung.

Contact

› Diana Schaack, Agrarmarkt Informations-Gesellschaft mbH (AMI), Bonn, Germany, www.ami-informiert.de

Ghana

Source

The data was compiled by FiBL based on the data of the following international certifiers. Not all certifiers provided updated data.

› CERTISYS, Brussels, www.certisys.eu
› Control Union, Zwolle, The Netherlands, www.controlunion.org
› Ecocert West Africa, Ougadougou, Burkina Faso
› Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de

Contact

› Tobias Fischer, Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
› Emmeline Foubert, CERTISYS, Brussels, Belgium
› Ditta Fetekene, Control Union, Zwolle, The Netherlands

Greece

Sources

› Land area and operators: Eurostat database, Eurostat, Luxembourg.
› Market data: Daso Business Performance PC, Strategy & Management Consultants, Thessaloniki, Greece
› Wild collection data (2015) Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy

Contact

› Nicolette van der Smissen, Feres, Greece

Grenada

Certifier data.

Guadeloupe

Source

› Agence Bio, Montreuil-sur-Bois, France. www.agencebio.org.

Contact

› Eva Lacarce, Agence Bio, Montreuil-sous-Bois, France, www.agencebio.fr

Guatemala

Source

› Total area: USDA Source: USDA Foreign Agricultural Service, Global Agricultural Information Network (2015): Guatemala. USDA, Washington D.C.
› Crop data: Department of Organic Agriculture, Ministerio de Agricultura, Ganaderia y Alimentación (MAGA), Ciudad de Guatemala, Guatemala C.A. 01013, www2.maga.gob.gt. The data is from 2011.

Contact

› Álvaro Alfredo Ramos Méndez, Lauro Antonio Rivera Gramajo, Dirección de Fitozoogenética y Recursos Nativos (DFRN), Viceministerio de Sanidad Agropecuaria y Regulaciones (VISAR), Ministerio Agricultura, Ganadería y Alimentación (MAGA), Ciudad de Guatemala, Guatemala, https://visar.maga.gob.gt/

Guinea

Certifier data (from 2017).

Guinea Bissau

Certifier data.

Guyana

Source

› Ecocert Colombia, Mexico, Peru Bogota D.C., Colombia (wild collection).

Contact

› Guillaume Granier, Ecocert Colombia, Mexico, Peru, Bogota D.C, Colombia

Haiti

Source

› IMOcert Latinoamerica LTDA, Cochabamba, Bolivia
› Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
› Ecocert France, L'Isle-Jourdain, France

Contact

› Eva Berre, Ecocert France, L'Isle-Jourdain, France
› Osvaldo Garcia, IMOcert Latinoamerica LTDA, Cochabamba, Bolivia
› Tobias Fischer, Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de

Honduras

Source

› Agricultura Orgánica Honduras, Secretaria de Agricultura y Ganadería, Tegucigalpa, Honduras, SENASA Honduras.

Contact

› Carlos Galo, Jefe del Departamento de Agricultura Orgánica (DAO) Sub Dirección de Sanidad Vegetal (SAVE). Servicio Nacional de Sanidad Vegetal (SENASA) Secretaría de Agricultura y Ganadería (SAG) Edificio

Senasa Boulevard Centroamérica, Ave. La FAO, antes de INJUPEMH, Tegucigalpa. M.D.C. Honduras.

Hong Kong

Certifier data.

Hungary

Sources

› Land area and operator data: National Food Chain Safety Office, Food and Feed Safety Office, Food Trade Control Department, Hungary, www.nebih.gov.hu, and Eurostat database, Eurostat, Luxembourg
› Market and trade data (2015): Survey/Estimate by Ferenc Frühwald, Budapest, Hungary

Contact

› Bence Trugly, ÖMKI, Budapest, Hungary, www.biokutats.hu

Iceland

Source

› Vottunarstofan Tún ehf. Laugavegur 7, 101 Reykjavík, Iceland, www.tun.is.

Contact

› Rannveig Guðleifsdóttir, Vottunarstofan Tún ehf., Reykjavík, Iceland, www.tun.is

India

Source

› Land area, operators, exports: Agricultural and Processed Food Products Export Development (APEDA) Ministry of Commerce & Industry, Government of India, New Delhi, India, www.apeda.com.
› Retail sales data (2017): ICCOA- International Competence Centre for Organic Agriculture, Karnataka, India

Note:

› In 2018, there were 426'403 hectares PGS certified and managed by a total of 605'254 farmers organized in 23'061 PGS groups. The data is available at: http://pgsindia-ncof.gov.in.

Contact

› Manoj Kumar Menon, International Competence Centre for Organic Agriculture ICCOA, Bangalore, India

Indonesia

Source

› Indonesian Organic Alliance, Bangor, Indonesia (www.organicindonesia.org). Survey among the certifiers active in the country.

Contact

› Lidya Ariesusanty, lidya.arie@gmail.com

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. The data is from 2017.

Contact

› Hossein Mahmoudi, Environmental Sciences Research Institute, Shahid Beheshti University ESRI, Tehran, Iran.

Iraq

Source

› Zakho Small Villages Projects (ZSVP), Dohuk City, Dohuk, Iraq

Contact

› Dr. Abid Ali Hasan, Zakho Small Villages Projects (ZSVP), Program Coordinator in Iraq, Dohuk City, Dohuk, Iraq

Ireland

Source

› Area, operators and livestock data: Eurostat, Luxembourg
› Market data (2017): Bord Bia, Dublin, Ireland. The retail sales presented here are a Bord Bia extrapolation of the Kantar panel data and hence not comparable to the total organic retail sales provided in the previous years.

Contact

› Lorcan Burke, Bord Bia, Dublin, Ireland

Israel

Source

› Standardization and Accreditation Department Ministry of Agriculture and Rural Development Plant Protection and Inspection Services (PPIS), Israel, www.ppiseng.moag.gov.il/ppiseng/ISREAL

Contact

› Tal Weil Tzameret, Standardization and Accreditation Department, Ministry of Agriculture and Rural Development, Plant Protection and Inspection Services (PPIS), Israel

Italy

Sources

› Operator, primary crops, livestock products: SINAB (2019): Bio in Cifre 2018. SINAB, Rome, Italy, Eurostat database, Eurostat, Luxembourg, and Mediterratnen Organic Networ MOAN, Bari, Italy
› Market: Nomisma (2019): Osservatoria Sana 2019. Il posizionamento competitivo del BIO Made in Italy sui mercati esteri. Nomisma,

Bologna. Presentation at Sana, September 2019, Bologna, Italy. http://www.sinab.it/content/bio-statistiche

Contact

› Roberto Pinton, Assobio, 35121 Padova, Italy
› Silvia Zucconi, Nomisma, Bologna, Italy

Jamaica

Source

› Jamaica Organic Movement JOAM, P.O. Box 5728, Kingston 6, Jamaica, www.joamltd.org. The data is from 2016.

Contact

› Trevor Brown, Jamaica Organic Movement JOAM, www.joamltd.org

Japan

Source

› Area and producer data: Ministry of Agriculture, Forestry and Fisheries (MAFF),Tokyo, Japan, http://www.maff.go.jp/j/jas/jas_kikaku/yuuki.html#zisseki
› Domestic market data: Ministry of Agriculture, Forestry and Fisheries (MAFF), Tokyo, Japan. Data provided by the Italian Embassy in Tokyo at a presentation at SANA 2019, Bologna

Contact

› Saori Hearn, IFOAM JAPAN, Tokyo, Japan
› Heinz Kuhlmann, ABC Enterprises, Tokyo, Japan
› Miyoshi Satoko, Global Organic Textile Standard (GOTS) Japan, Tokyo, Japan

Jordan

Source

› Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy. The data is from 2017.

Kazakhstan

Sources

› Bioinspecta, Frick, Switzerland
› Control and Certification for Organic Products Office Ufficio Attività di Controllo e Certificazione Prodotti Biologici, Bologna, Italy, www.ccpb.it
› Ecocert Balkan, Belgrad, Serbia
› Ekoagros, Kaunas, Lithuania
› Organic Standard, Kyiv, Ukraine

Contact

› Sergiy Galashevskyy, Organic Standard, Kyiv, Ukraine
› Milana Kosanovic, Ecocert Balkan , Belgrad, Serbia
› Virginija Luksiene, Ekoagros, Kaunas, Lithuania
› Roberto Maresca , Control and Certification for Organic Products Office CCPB, Bologna, Italy, www.ccpb.it
› Franziska Staubli, Bioinspecta, Frick, Switzerland

Kenya

Source

› Kenya Organic Movement (KOAN), Nairobi, Kenya, www.koan.co.ke.

Contact

› Samuel Ndungu, Kenya Organic Movement (KOAN), Nairobi, Kenya, www.koan.co.ke

Kiribati

Sources

› Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Contact

› Karen Mapusua, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

Korea, Republic of

Source

› Korea Institute of Rural Social Affairs, Chungnam Province, Republic of Korea, Republic of Korea

Contact

› Jennifer Chang, Korean Federation of Organic Agriculture Organisations (KFSA), Republic of Korea
› Hakkyun Jeong, Korea Institute of Rural Social Affairs, Chungnam Province, Republic of Korea

Kosovo

Source

› Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy

Kuwait

Source

› Ecocert India, Aurangabad, Maharashtra, India, www.ecocert.com

Contact

› Amresh Kumar Pandey, Ecocert India, Aurangabad, Maharashtra, India, www.ecocert.com

Kyrgyzstan

Source

› Agricultural Commodity and Service Cooperative "Bio Farmer", Kyrgyzstan. To this

data, the data of two international certifiers was added.

Contact

› Gulzaada Aleshova, Helvetas, Jalalabad, Kyrgyzstan

Lao People's Democratic Republic

Source

› Department of Agriculture (DOA), PO BOX 811, Vientiane, Laos. The data is from 2016.

Contact

› Thavisith Bounyasouk, Department of Agriculture (DOA), PO BOX 811, Vientiane, Laos

Latvia

Source

› Area and Operators: Eurostat database, Eurostat, Luxembourg
› Market data (from 2017): Retail sales and export data: Moreganic Sourcing AB (2018): Baltic Organic Market Report 2018/2019. Moreganic Sourcing, Uppsala, Sweden

Lebanon

Source

› Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy
› For some crop details, the data of CCPB Middle East were used.

Lesotho

Certifier data.

Liechtenstein

Source

› Klaus Büchel Anstalt, Institute of Agriculture and Environment, 9493 Mauren, Liechtenstein, www.kba.li.

Contact

› Florian Bernardi and Klaus Büchel, Institute of Agriculture and Environment, 9493 Mauren, Liechtenstein, www.kba.li.

Note

Retail sales data are not available for Liechtenstein. Data published previously were based on estimates and removed from the database.

Lithuania

Source

› Land area, production volume, operators: Eurostat database, Eurostat, Luxembourg
› Market data: Retail sales and export data (2017): Moreganic Sourcing AB (2018): Baltic Organic Market Report 2018/2019. Moreganic Sourcing, Uppsala, Sweden

Contact

› Virginija Luksiene, Ekoagros, Kaunas, Lithuania
› Virgilijus Skulskis, Lithuanian Institute of Agri Economics, Vilnius, Lithuania

Luxembourg

Source

› Land area and operator data: Administration des Services Techniques de l'Agriculture, Service de la protection des végétaux, Luxembourg, www.asta.etat.lu
› Market data: Oekopolis estimate based on turnover data of the specialized shops and supermarkets, Oikopolis, Munsbach, Luxembourg

Contact

› Claudine Schmit, Ministère de l'Agriculture, de la Viticulture et de la Protection des consommateurs, Luxembourg, www.asta.etat.lu
› Aender Schanck, Biogros, Munsbach, www.biogros.lu

Madagascar

Certifier data.

Malawi

Source

The data were compiled by FiBL based on the data of the following international certifiers.

› Control Union, Zwolle, The Netherlands, www.controlunion.org
› Ecocert Southern Africa, Gardens Cape Town, www.ecocert.com
› Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de

›

Contact

› Ditta Fetekene, Control Union, Zwolle, The Netherland
› Tobias Fischer, Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
› Alta Saunders, Ecocert Southern Africa, Stellenbosch, South Africa
› Marianna Smith, , Ecocert Southern Africa, Stellenbosch, South Africa

Note

› The number of producers is higher than in the past, as for the first time the number of smallholders was provided by one certifier.

Malaysia

Source

› Control Union, Zwolle, The Netherlands

› Ecocert India, Aurangabad, Maharashtra, India, www.ecocert.com
› National Association for Sustainable Agriculture Australia (NASAA) Certified Organic (NCO, Stirling, Australia
› Organic Agriculture Certification Thailand (ACT), Bangkok, Thailand

Contacts

› Ditta Fetekene, Control Union, Zwolle, The Netherlands
› Weena Krut-ngoen, Organic Agriculture Certification Thailand (ACT), Bangkok, Thailand
› Carolin Möller, National Association for Sustainable Agriculture Australia (NASAA) Certified Organic (NCO, Stirling, Australia
› Amresh Kumar Pandey, Ecocert India, Aurangabad, Maharashtra, India, www.ecocert.com

Mali

Certifier data. The data is from 2017.

Malta

Source: Eurostat database, Eurostat, Luxemburg

Martinique (France)

Source

› Agence Bio, Montreuil-sur-Bois, France. www.agencebio.org

Contact

› Eva Lacarce, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

Mauritius

Source

› Ecocert, Antananarivo, Madagascar, www.ecocert.com

Contact

› Brayène Ramanantsoa, Ecocert, Antananarivo, Madagascar, www.ecocert.com

Mayotte (France)

Source

› Agence Bio, Montreuil-sur-Bois, France. www.agencebio.org

Contact

› Eva Lacarce, Agence Bio, Montreuil sous Bois, France, www.agencebio.fr

Mexico

Source

› Subdirectora de Autorización y Aprobación de Organismos de Coadyuvancia, Servicio Nacional de Sanidad, Inocuidad y Calidad Agroalimentaria (SENASICA), Secretaría de Agricultura y Desarrollo Rural (SADER), Ciudad de México, México

Contact

› Aurora Josefina Lobato García, Responsable de control de productos orgánicos., Servicio Nacional de Sanidad, Inocuidad y Calidad Agroalimentaria (SENASICA), Secretaría de Agricultura y Desarrollo Rural (SADER), Ciudad de México, México

Note

Please note that the data source has changed and that **a direct year-to-year comparison is not possible.** The current data include data from all certifiers that are registered under the system of the Mexican Ministry of Agriculture (SADER). Previously the data were provided by the Universidad Autónoma Chapingo (Latest data from 2016). The differences in the total area maybe due to the fact that previous data may have included double-certified operations.
As to the operators, it should be noted that under the current system only operations are counted but not the smallholders associated to them. The current number of all operations including smallholders is not available.

Moldova

Source

Institutul National de Cercetari Economice, data provided by: Liliana Calmațui; Asociația Educație pentru Dezvoltar (AED)

Contact

› Liliana Calmațui, Manager proiect InfOrganic, Asociația Educație pentru Dezvoltare (AED) http://aed.ong/, 012 Chișinău, Republica Moldova

Note

The 2018 data are not diectly comparable with the previous data as the data source has changed. Previous data may have included double-certified operations.

Monaco

Certifier data.

Mongolia

› Department of Coordination for Food Production Policy Implementation, Ministry of Food Agriculture and Light industry of Mongolia Contact
› TUNGALAG Davaa. Senior officer, Department of Coordination for Food Production Policy Implementation, Ministry of Food Agriculture and Light industry of Mongolia

Note

Please note that the data refer to PGS operations certified under the governments' accreditation system.

Montenegro

Source

› Ministry of Agriculture and Rural Development, Podgorica, Montenegro
› Market data (from 2010): Ecozept - Market research and marketing consulting agency. Freising, Germany

Contact

› Andrijana Rakočević, Advisor for Organic production, Ministry of Agriculture and Rural Development, Podgorica, Montenegro

Morocco

Sources

› AMABIO, Casa Blanca, Morocco, www.amabio.org
› Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy

Contact

› Zaoui Elhousseine, AMABIO/FIMABIO, Casa Blanca, Morocco, www.amabio.org

Mozambique

Sources

› Control Union, Zwolle, The Netherlands
› Ecocert, South Africa, Stellenbosch, Namibia
› Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de

Updated data was not available from all certifiers.

Contact

› Ditta Fetekene, Control Union, Zwolle, The Netherlands
› Tobias Fischer, Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
› Alta Saunders, Ecocert Southern Africa, Stellenbosch, South Africa
› Marianna Smith, , Ecocert Southern Africa, Stellenbosch, South Africa

Myanmar

Certifier data (from 2017)

Namibia

Source

› Certifier data.

Note

› Please note that previously PGS data were included. However, these were not confirmed (see also PGS statistics in this book) and therefore this data was removed from the database. This explains the drop in organic farmland in Namibia.

Nepal

Source

› Certifier data

Note

› In previous years data were provided by Maheswar Ghimire, Kathmandu, Nepal.

Netherlands

Sources

› Land area and operator data: Eurostat database, Eurostat, Luxembourg.
› Retail sales and exports data: Bionext, Ede, The Netherlands; the Bionext website, https://bionext.nl/. The export data is from 2016.

Contact

› Miriam van Bree, Bionext, Ede, The Netherlands, www.bionext.nl

New Caledonia

Source

› Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Contact

› Karen Mapusua, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

New Zealand

Source

› 2018 New Zealand Organic Sector Market Report. Organics Aotearoa New Zealand, Wellington, New Zealand, www.oanz.org.nz.

Contact

› Jon Manhire, the AgriBusiness Group, Christchurch, New Zealand, www.agribusinessgroup.com

Nicaragua

Source

› Instituto de Protección y Sanidad Agropecuaria IPSA, Departamento de Inspección Certificación Fitosanitaria, Managua, Nicaragua, www.magfor.gob.ni

Contact

› Ing. Ramón Ernesto Noguera García, Instituto de Protección y Sanidad Agropecuaria IPSA, Departamento de Inspección Certificación Fitosanitaria, Managua, Nicaragua, www.magfor.gob.ni

Niger

Certifier data.

Nigeria

Source

› Association of Organic Agriculture Practitioners of Nigeria (NOAN), Ibadan, Nigeria, and University of Ibadan, Nigeria The data includes PGS area. To this data, the data of international certifiers was added.

Contact

› Olugbenga O. AdeOluwa, University of Ibadan, Nigeria

Niue

Source

› Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Contact

› Karen Mapusua, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

North Macedonia

Source

› Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy
› Wild collection: Certifier data

Norway

Sources

› Land area and operator data: Eurostat database, Eurostat, Luxembourg
› Market data for general retailers: Norwegian Agriculture Agency (Landbruksdirektoratet), Oslo, Norway based on Nielsen data. The total retail sales data were compiled by FiBL based on data from the Norwegian Agriculture Agency and experts estimates on further sales channels.

Contact

› Alexandra Forbord, Norwegian Agriculture Agency (Landbruksdirektoratet), Oslo, Norway

Oman

Source

› Data from one international certifier were added to the data provided previously.

Pakistan

Certifier data.

Palestine, State of

Area for agricultural land, production, beehives, total wild collection area: Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy

Panamá

Source

› Ministerio de Desarrollo Agropecuario, Dirección Nacional de Sanidad Vegetal, Panama, www.mida.gob.pa.

Contact

› Fermín Vicente Romero Houlstan, Rita Villareal, Dirección Nacional de Sanidad Vegetal, Ministerio de Desarrollo Agropecuario (MIDA), Panama, www.mida.gob.pa

Papua New Guinea

Source

› Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Contact

› Karen Mapusua, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

Paraguay

Source

› Servicio Nacional de Calidad y Sanidad Vegetal y de Semillas, Department of Organic Agriculture, Asuncion, Paraguay, www.senave.gov.py

Contact

› Genaro Coronel, Servicio Nacional de Calidad y Sanidad Vegetal y de Semillas, Department of Organic Agriculture, Asuncion, Paraguay, www.senave.gov.py
› Juana Beatriz Caballero Almada, Coordinadora Ejecutiva de la Dirección de Extensión Agraria (Viceministerio de Agricultura, Ministerio de Agricultura y Ganadería) Coordinadora Alterna - Comité Técnico de Promoción de la Producción Orgánica (CTPPO)

Perú

Source

› Area and number of producers: SENASA. Producción Orgánica. Lima, Perú. As not detailed crop data area available (apart from 5 main crops), old data from 2010 are used for the crop details.
› Domestic market data (2010) data: Promperu, Lima, 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). Updates are not available.
› Export data: Promperu, Lima, Perú, www.promperu.gob.pe

Contact

› Félix Oswaldo Maquera Cuayla, Subdirección de Producción Orgánica, Servicio Nacional de Sanidad Agraria (SENASA), Ministerio de Agricultura y Riego (MINAGRI)
› Marly Cristina López Rengifo, Dirección General Agrícola (DGA – MINAGRI). Secretaria Técnica del Consejo Nacional de Productos Orgánicos (CONAPO).

Philippines

Sources

The data were compiled by FiBL from a number of certifiers, but there are more certifiers active than those listed below. Certifiers who provided data:

› Ceres, Happburg, Germany, www.ceres-cert.com;
› Control Union, Zwolle, The Netherlands, www.controlunion.org;
› Ecocert India, Aurangabad, Maharashtra, India, www.ecocert.com
› Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de

Contact

› Albrecht Benzing, Ceres, Happburg, Germany, www.ceres-cert.com
› Ditta Fetekene, Control Union, Zwolle, The Netherlands, www.controlunion.org.
› Tobias Fischer, Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de;
› Amresh Kumar Pandey, Ecocert India, Aurangabad, Maharashtra, India, www.ecocert.com

Note

A direct year-to-year comparison over the years is not possible as not all certifiers provided updates every year. Please note that we undertook a total revision of the historical area and producer data due to the fact that one certifiers provided revised data.

Poland

Source

› Land area and land use, livestock and production: Department of Promotion and Food Quality, Ministry of Agriculture and Rural Development, Poland and Eurostat database, Eurostat, Luxembourg
› Market data: Biokurier, quoted by Biofach: "Bio weltweit weiter auf Wachstumskurs". Biofach Press release of November 5, 2018. https://www.biofach.de/de/news/presseinformationen/biofach-2019-marktbericht%20-4n49w4cfex_pireport

Contact

› Bartosz Pytlak, Organic Farming Unit, Ministry of Agriculture and Rural Development, Warsaw, Poland, www.minrol.gov.pl

Portugal

Source

› Organic land and operators: Eurostat database, Luxembourg
› Market data (2011): INTERBIO, http://www.interbio.pt

Contact

› Catarina Crisostomo, Portugal

Puerto Rico

Certifier data (from 2016).

Réunion

Source

› Agence Bio, Montreuil-sur-Bois, France. www.agencebio.org

Contact

› Eva Lacarce, Agence Bio, Montreuil-sous-Bois, France, www.agencebio.fr

Romania

Sources

› Organic area, land use, livestock and production: Eurostat database, Luxemburg.
› 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. The data is from 2014.
› International trade data (from 2011): BCG-Global Advisors (2013) Romanian Organic Sector – Business Insight Booklet. Global Advisors, Bio-Romania Association, University of Bucharest. Bucharest 2012
› Retail sales data: Dobrescu, Monica (2017): Romania: Organic production and market overview. GAIN Report No. RO 1702. The USDA FAS website. USDA, Washington. The data is from 2016.

Russian Federation

Source

The area data was compiled by FiBL based on the data of the following international certifiers:

› Bio.Inspecta, Frick, Switzerland, www.bio-inspecta.ch
› Control Union, Zwolle, The Netherlands, www.controlunion.org
› Ecocert China, Beijing, China
› Ekoagros, Kaunas, Lithuania

› Ecoglobe - Organic control and certification body, Yerevan, Republic of Armenia, www.ecoglobe.am
› Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
› Control and Certification for Organic Products Office , Roberto Maresca, Ufficio Attività di Controllo e Certificazione Prodotti Biologici, , Bologna, www.ccpb.it
› Organic Standard, Kyiv, Ukraine
› Organización Internacional Agropecuaria (OIA), Buenos Aires, Argentina

Market data (retail sales)

› Prusso, Giuseppe (2019): Il Mercato die Prodotti Bio nella Federazione Russa. Presentation by Prusso, Giuseppe of the Italian Trade Agency at Sana, Bologna, September 6, 2019

Contact

› Nune Darbinyan, Ecoglobe - Organic control and certification body, Yerevan, Republic of Armenia, www.ecoglobe.am.
› Ditta Fetekene, Control Union, Zwolle, The Netherlands, www.controlunion.org
› Tobias Fischer, Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
› Sergiy Galashevskyy, Organic Standard, Kyiv, Ukraine
› Pedro Landa, Organización Internacional Agropecuaria (OIA), Buenos Aires, Argentina
› Virginija Luksiene, Ekoagros, Kaunas, ithuania
› Franziska Staubli, Bio.Inspecta, Frick, Switzerland, www.bio-inspecta.ch

Note

A direct year-to-year comparison over the years is not possible as not all certifiers provide updates every year.

Rwanda

Certifier data.

Samoa

Source

› Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Contact

› Karen Mapusua, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

San Marino

Certifier data.

Sao Tome and Prince

Source

› National Directorate of Planning, Ministry of Finance, Trade and Blue Economy, São Tome and Principe, www.financas.st. The number of producers was provided by Ecocert.

Contact

› Geisel de Menezes, Director of Planning and Prospective, Min. of Finance, Commerce and Blue Economy, São Tome and Principe, www.financas.st.

Saudi Arabia

Source

› Department of Organic Agriculture (DOA), http://moa.gov.sa/organice/portale

Contact

› Eng. Ayman Saad Al-Ghamdi, General Manager of Organic Agriculture Department (DOA), Saudi Arabia
› Raed Saleh Almusaylim; Manager of Control & Legislation Section, Department of Organic Production, Riyadh, Saudi Arabia

Senegal

› Certifier data and 2013 data from National Federation for Organic Agriculture, Thiès, Sénégal

Serbia

Source

› Ministry of Agriculture, Forestry and Water Management, Belgrade, Republic of Serbia

Contact

› Jelena Milic, Ministry of Agriculture, Forestry and Water Management, Belgrade, Republic of Serbia

Sierra Leone

Certifier data.

Singapore

Certifier data.

Slovakia

Sources

› Area, operators, livestock, and crop production: Eurostat database, Luxemburg
› Market data (2010): Ecozept, market research and marketing consulting agency. Freising, Germany

Slovenia

Sources

› Area, operators, livestock, crop production: Ministrstvo za kmetijstvo, gozdarstvo in prehrano-Ministry of Agriculture, Forestry and Food, Ljubljana, Slovenia, www.mkgp.gov.si
› Domestic market data (from 2103): Institute for Sustainable Development, Ljubljana, Slovenia

› Marketing channels (from 2009): Institute for Sustainable Development, Ljubljana, Slovenia
› Exports and imports (from 2009): Institute for Sustainable Development, Ljubljana, Slovenia

Contact

› Anamarija Slabe, Institute for Sustainable Development, Ljubljana, Ljubljana, Slovenia
› Maja Zibert, Ministrstvo za kmetijstvo, gozdarstvo in prehrano-Ministry of Agriculture, Forestry and Food, Ljubljana, Slovenia, www.mkgp.gov.si

Solomon Islands

Source

› Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int.

Contact

› Karen Mapusua, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

Somalia

Certifier data.

South Africa

Sources

The data were compiled by FiBL based on the data of the following international certifiers.

› Control Union, Zwolle, The Netherlands, www.controlunion.org
› Ecocert Southern Africa, Gardens Cape Town, www.ecocert.com
› Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de

Please note that not all certifiers provided updated data. The total area for 2017 was revised as some areas had been counted as agricultural land, when in fact these were wild collection areas. The revised figure for 2017 is 22'646 hectares.

Contact

› Ditta Fetekene, Control Union, Zwolle, The Netherland
› Tobias Fischer, Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
› Alta Saunders, Ecocert Southern Africa, Stellenbosch, South Africa
› Marianna Smith, , Ecocert Southern Africa, Stellenbosch, South Africa

Spain

Sources

› Area and land use, operators: Ministerio de Agricultura y Pesca, Alimentación y Medio Ambiente (2019): Estrategias de vertebración del sector de la producción ecológica de España – Año 2018. MAPAMA, Madrid
› Market and international trade data MAPAMA - Ministerio de Agricultura, Pesca y Alimentación (MAPA) (2018) Caracterizacion y analisis de la viabilidad de una organizacion interprofesional agroalimentria en el sector de la produccion ecologica de Espana. MAPA, Madrid. The market data is from 2017.

Contact

› Pedro López, Pro-Voc-Association, Madrid, Spain, www.provotec.es
› Joan Picazos, Biocop Productos Biológicos, S.A. (BIOCOP), Lliçà de vall (Barcelona), Spain, www.biocop.es

Sri Lanka

Source

› The data were compiled by FiBL using the data from several international certifiers.

Contact

› Please note that some data revisions took place and that the 2018 data is not directly comparable to the 2017 data-

Sudan (former)

Source

Certifier data

Suriname

Source

› Ecocert Colombia, Mexico and Peru, Bogota D.C., Colombia
› Guillaume Granier, Ecocert Colombia, Mexico, Peru, Bogota D.C, Colombia

Sweden

Sources

› Area, livestock and operators: Eurostat database, Luxembourg
› Market data: Ecoweb Sweden. Please note that the data source was changed in 2017 from Statistics Sweden to Ecoweb, also for historical data. Per capita consumption and growth rates were recalculated.

Contact

› Cecilia Ryegård, Ecoweb, Sweden.

Switzerland

Sources

› Land area and crop data, producers: Federal Agency for Statistics (BfS), Neuchatel, Switzerland.
› Operator data: Bio Suisse, Basel, Switzerland
› Market data: Bio Suisse, Basel, Switzerland, www.biosuisse.ch/de/bioinzahlen.php.

Contact

› Helga Willer, FiBL, Frick, Switzerland

Syria

› Source for all data: Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy
› No separate figure for the number of producers was available; the figure communicated is that for all operators in the country.

All data is from 2010.

Taiwan

Source

› Agriculture and Food Agency, Council of Agriculture, Executive Yuan, R.O.C. Taiwan. Available at https://info.organic.org.tw/category/english/statistics/

Contact

› Ray Tzeng, , Organic Center, National I-lan University, Taiwan

Tajikistan

Source

› Please note that previous data for after 2013 from varoius sources have been removed, as no updates were received. Instead the data from Textile exchange on cotton and cotton producers were used and for 2018 further crop data from one international certifier were added.

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

› Jordan Gama, 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. Domestic market and international trade data is from 2014. For some crops, details were added from certifiers data.

Contact

Vitoon Panyakul, Green Net, 10330 Bangkok, Thailand, www.greennet.or.th.

Timor-Leste

Certifier data.

Togo

Sources

The data was compiled by FiBL based on the data of the following international certifiers. Not all certifiers provided updated information.

› CERTISYS, Brussels, Belgium, www.certisys.eu
› Ecocert, Ecocert West Africa, Ougadougou, Burkina Faso, www.ecocert.com
› LACON GmbH, Moltkestraße 4, Offenburg, Germany

Tonga

Source

› Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Contact

› Karen Mapusua, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

Tunisia

Source

› Direction Générale de L'Agriculture Biologique (DGAB), Tunis, Tunisia.

Contact

› Samia Maamer Belkhiria, Direction Générale de L'Agriculture Biologique (DGAB), Ministry of Agriculture and Hydraulic Resources, Tunis, Tunisia

Note

Please note that the data in this volume is from 2017 as the 2018 data were received too late. The data will be included into the FiBL database at a later stage. According to DGAB 286'623 hectares were managed organically by 7456 producers.

Turkey

Source

› Republic of Turkey Ministry of Agriculture and Forestry, Ankara, Turkey
› Market data (2014): USDA Foreign Agricultural Services (2016): Turkish Organic Market Overview. USDA, Washington, USA. Available at https://gain.fas.usda.gov/Recent%20GAIN%20Publications/Turkish%20Organic%20Market%20Overview_Ankara_Turkey_1-26-2016.pdf

Contact

› Elif Bayraktar Öktem, Republic of Turkey Ministry of Agriculture and Forestry, Ankara, Turkey

Notes

Some areas contain crops that can be harvested from the same parcel. Therefore, the total of the land use/crop data exceeds the actual area surface cultivated for organic farming. A

correction value was used in order to calculate the correct total.

Uganda

Source

› National Organic Agricultural Movement of Uganda (NOGAMU), PO Box 70071, Clock Tower, Kampala, Uganda, www.nogamu.org.ug. The data is from 2016.

Ukraine

Sources

› Area and operator data: Ministry for Development of Economy, Trade and Agriculture of Ukraine of Ukraine, Kyiv, Ukraine
› Crop data: Estimate of FiBL Switzerland and Agricultural Information Company AMI based on data of the Organic Federation of Ukraine, Agricultural Information Company AMI and Ministry of Agrarian Policy and Food of Ukraine
› Domestic market, export value and wild collection data: Organic Federation of Ukraine (OFU), Kyiv, Ukraine, www.organic.com.ua

Contact

› Valentyna Zaiets, Ministry for Development of Economy, Trade and Agriculture of Ukraine,,http://www.me.gov.ua
› Eugene Milovanov, Organic Federation of Ukraine, Kyiv, Ukraine, www.organic.com.ua

United Arab Emirates

Source

› Ministry of Environment and Water (MOEW), United Arab Emirates.

Contact

› Eng. Saif Mohamed Alshara, Ministry of Environment and Water, UAE
› Fatima Obaid Saeed, Ministry of Environment and Water, UAE
› Mohammad Al-Oun (PhD), Organic Farming, Plant Health and Development Department, Dubai, UAE

United Kingdom

Sources

› Land use details/crops/operators: Eurostat database, Eurostat, Luxembourg
› Market data: Soil Association (2019): Organic Market Report 2019. Soil Association, Bristol. The export data is from 2016.

Contacts

› Finn Cottle, Soil Association, Bristol, UK

United States of America

Source

› Land area and producers: United States Department of Agriculture, Washington, USA. Available at http://usda.mannlib.cornell.edu/usda/current/OrganicProduction/OrganicProduction-09-20-2017_correction.pdf. The data is from 2016.
› Market data: Organic Trade Association, Washington D.C., USA
› Export data: OTA (from 2016)

Contact

› Barbara Haumann, OTA, Brattleboro VT 05301, www.ota.com
› Bridget McElroy, International Specialist National Organic Program (NOP), Agricultural Marketing Service (AMS), U.S. Department of Agriculture (USDA)

United States Virgin Islands

Certifier data.

Uruguay

Source

› Control Union, Zwolle, The Netherlands, www.controlunion.org
› Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
› Organización Internacional Agropecuaria (OIA), Buenos Aires, Argentina

Contact

› Ditta Fetekene, Control Union, Zwolle, The Netherlands, www.controlunion.org
› Tobias Fischer, Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
› Pedro Landa, Organización Internacional Agropecuaria (OIA), Buenos Aires, Argentina

Uzbekistan

Certifier data.

Vanuatu

Source

› Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Contact

› Karen Mapusua, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

Venezuela

United States Department of Agriculture (USDA) Organic Integrity Database. USDA, Washington

Viet Nam

Source

› Vietnam Organic Agriculture Association, Hanoi, Vietnam. Please note that some PGS figures were included.

Note:

› The increase of the organic farmland and retail sales is due to better data availability and to the fact that the decree on organic agriculture was issued, which encouraged many companies and farmers are encouraged to cultivated organic agriculture.

Contact

› Thanh Trinh, , Vietnam Organic Agriculture Association, Hanoi, Vietnam

Zambia

Source

› Ecocert Southern Africa, Stellenbosch, South Africa

Contact

› Alta Saunders, Ecocert Southern Africa, Stellenbosch, South Africa
› Marianna Smith, , Ecocert Southern Africa, Stellenbosch, South Africa

Zimbabwe

Source

› Ecocert Southern Africa, Stellenbosch, South Africa

Contact

› Alta Saunders, Ecocert Southern Africa, Stellenbosch, South Africa
› Marianna Smith, Ecocert Southern Africa, Stellenbosch, South Africa

Note

› Please note that data from other sources were removed from the database back to 2009 as they were not confirmed and it was not clear if there were duplications with the data from the certifiers.

Table 84: Development of the number of producers and the organic area according to the Ministry of Agriculture, Livestock and Food in Brasil

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Production units	5'406	8'064	11'063	10'064	13'232	13'482	15'590	20'050	22'064	25'227
Pro-ducers			5'934	6'719	10'194	11'478	14'222	17'451	17'473	19'978
Area			1'553'675*	603'206	749'305	940'000	1'094'131	653'630	719'286	822'406

Source: Ministério da Agricultura, Pecuária e Abastecimento
** Includes wild collection areas*

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Organic agriculture is practised in 186 countries, and 71.5 million hectares of agricultural land are managed organically by at least 2.8 million farmers. The global sales of organic food and drink reached more than 95 billion euros in 2018.
The 21st edition of The World of Organic Agriculture, published by the Research Institute of Organic Agriculture (FiBL) and IFOAM – Organics International, provides a comprehensive review of recent developments in global organic agriculture. It presents detailed organic farming statistics that cover the area under organic management, specific information about land use and crops in organic systems, the number of farms and other operator types, and selected market data. The book includes contributions from representatives of the organic sector around the world about the global market for organic food, organic imports, standards and regulations, organic policy developments, and insights into current and emerging trends in organic agriculture in Africa, Asia, Europe, Latin America, North America, and Oceania. In addition, the volume includes reports about the organic sector in Australia, Canada, the Pacific Islands, and the United States of America, and provides updates for various countries in Asia.

The latest data are presented annually at BIOFACH in Nuremberg, Germany 2021: 17–20 February.

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