Organic Agriculture Worldwide
Key results from 'The World of Organic Agriculture 2009', published by FiBL and IFOAM

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Data as published in 'The World of Organic Agriculture 2009'
with some minor revisions and some updates (October 30, 2009)
For updates check www.organic-world.net

About this presentation

- **This presentation summarizes the results of the global survey on organic agriculture carried out by the Research Institute of Organic Agriculture FiBL and the International Federation of Organic Agriculture Movements IFOAM.**
- **The results are published in the yearbook 'The World of Agriculture', which contains the tables with the full data sets.**
- **Further, more detailed data as well as more graphs are available at www.organic-world.net**
- **More information and background on geographical and other current aspects of organic agriculture are available in the above-mentioned yearbook (see http://www.organic-world.net/yearbook.html)**

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The Global Organic Survey 2009

The global organic survey 2009 as well as the production of the yearbook 'The World of Organic Agriculture' was carried out with the support of

- **International Trade Centre, Geneva**
- **Swiss State Secretariat of Economic Affairs SECO, Berne**
- **Nürnberg Messe, the organizers of the BioFach Organic Trade Fair**

International Trade Centre

Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Confederation

Federal Department of Economic Affairs FDEA
State Secretariat for Economic Affairs SECO

BioFach

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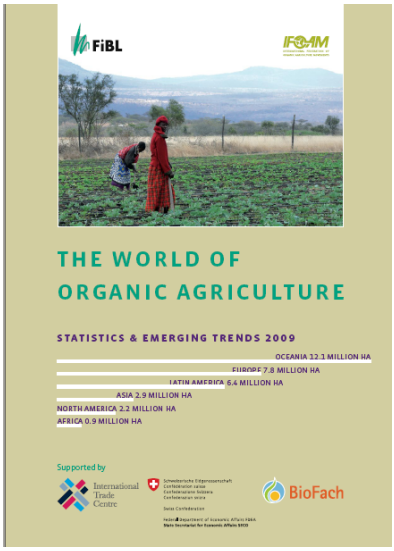
Yearbook ‘The World of Organic Agriculture’

- 10th edition of ‘The World of Organic Agriculture’, published by FiBL, IFOAM and ITC
- With contributions from more than 40 authors
- Contents:
  - Results of the global organic survey;
  - Organic agriculture in the geographical regions, special focus on Latin America;
  - Chapters on the global market, standards and legislation, activities of UN organizations, crops, food security, other issues.
- Quote: Willer, H. and Kilcher, L. (Eds.) (2009): The World of Organic Agriculture. Statsitics and Emering Trends 2009. IFOAM, Bonn; FiBL, Frick; ITC, Geneva.



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Website www.organic-world.net

- Detailed statistics in Excel format
- Graphs & maps
- Data revisions
- Background/country information
- Order form
- News, with a focus on statistical developments in organic agriculture

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Data differences in this presentation compared with the 2009 edition of 'The World of Organic Agriculture'

- **Czech Republic: Share of agricultural land corrected**
- **Latvia: Organic agricultural land and share corrected**
- **European Union / Europe: Totals corrected**
- **Saudi Arabia: Data were received after the finalization of the survey; these are included**

Note on the use of the term 'organic'

- **In this presentation, the term 'organic' includes both the fully converted as well as the certified in-conversion area, unless otherwise stated.**

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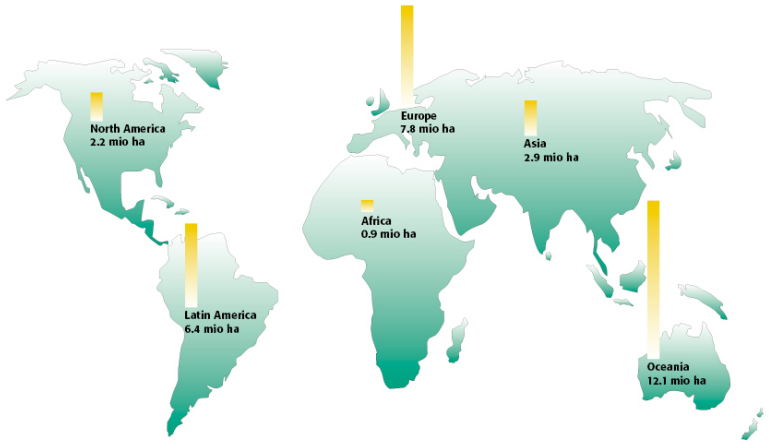
Organic agriculture worldwide 2007 – the tenth global organic survey



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Source: FiBL & IFOAM Survey 2009

The tenth survey on organic agriculture worldwide was carried out by the Research Institute of Organic Agriculture FiBL and the International Federation of Organic Agriculture Movements IFOAM (IFOAM for Africa).

The survey was carried out between July 2008 and finalized in February 2009.

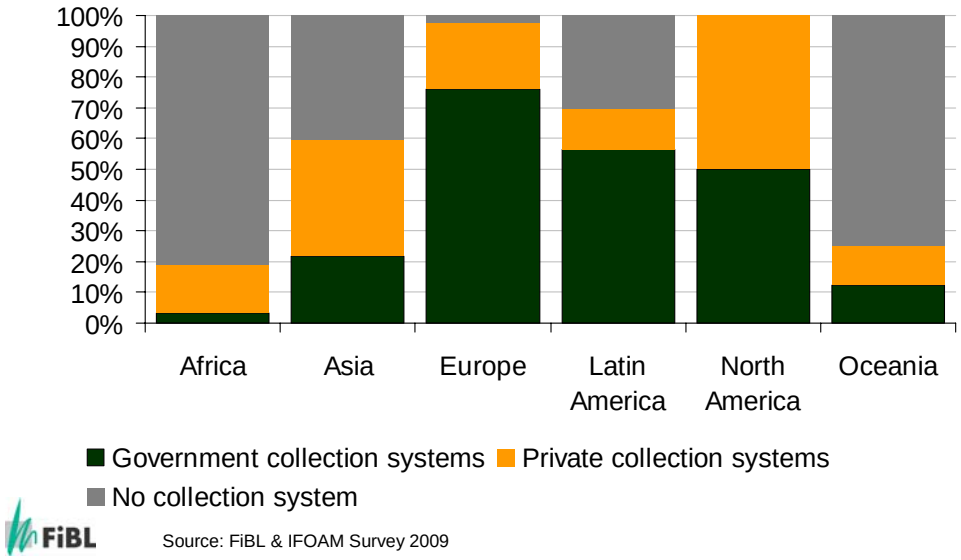
Most data collected are from 2007, for some countries for 2008. For some countries only older data were available.

Data were received from 142 countries (2006: 135 countries).

Data were provided by country experts (representatives from NGOs, certification bodies, governments, researchers).

The results are published in the yearbook ‘The World of Organic Agriculture 2009’ and at www.organic-world.net.

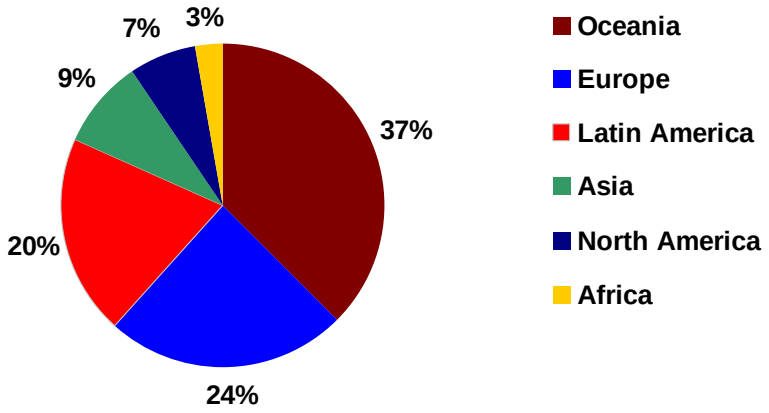
Data collection systems (land area and producer data)



Source: FiBL & IFOAM Survey 2009

- According to the global organic survey (142 countries), 55 countries have government data collection systems in place and and 34 have private collection systems.
- 53 countries have no permanent data collection system in place.
- For these countries, data were received from international certifiers or from contacts in the country, who provided the data specifically for the survey.
- These data are often not complete, and there is a problem of continuity over the years.
- Particularly in Africa and in Asia, data collection systems are still underdeveloped.
- This should be kept in mind with the data presented in the following slides.

World: Distribution of organically managed agricultural land by geographical region 2007



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Source: FiBL & IFOAM Survey 2009

32.2 million hectares of agricultural land are managed organically (end 2007).

More than one third of the world's organic land is in Oceania, followed by Europe (24%) and Latin America (20%).

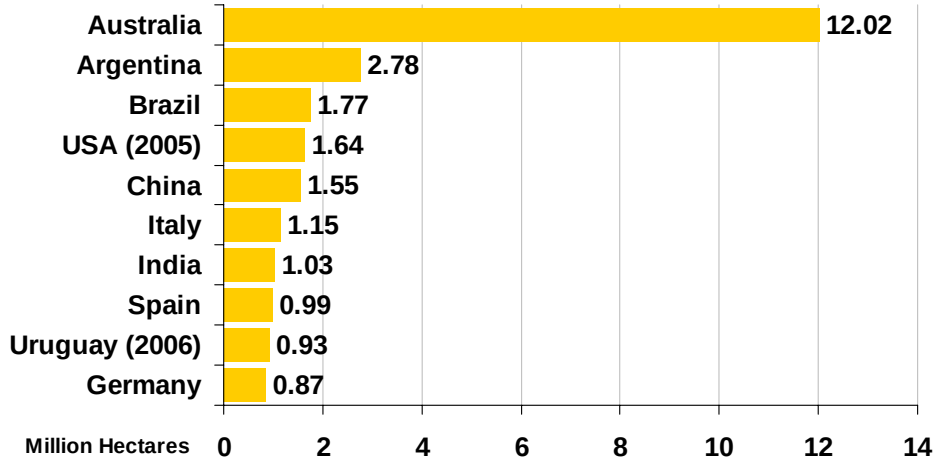
Compared with the 2006 data, Latin America and Africa have higher shares of the organic agricultural land, the share of Europe remained stable whereas as the relative importance of Oceania (mainly Australia) is decreasing.

In addition to the organic agricultural land there are:

- 0.4 million hectares of organic aquaculture areas
- 30.7 million hectares of organic wild collection areas

For statistics showing organic agricultural land and producers by region in 2007 (including in-conversion area) see Table 1, page 27, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net/basic-data.html

World: The ten countries with the most organic agricultural land 2007



Argentina, US and Uruguay: Only fully converted areas

FiBL Source: FiBL & IFOAM Survey 2009

The three countries with the most organic land are:

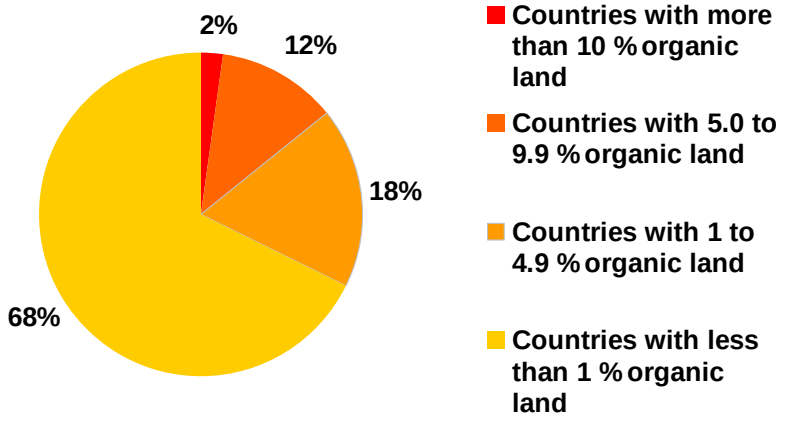
- Australia (12 million hectares), followed by
- Argentina (2.8 million hectares) and
- Brazil (1.8 million hectares)

Compared to 2006 the following major changes have occurred:

- Brazil, which held rank 8 in 2006 is now number 3, due to the fact that for the first time in-conversion data were received.
- China, which held rank 3 in 2006 held rank 6 in 2007, due to the fact that for the 2007 data land certified by foreign certifiers not registered under the Chinese organic law was not included.
- India appears for the first time among the ten countries with the largest organic agricultural land areas, due to government support and the increasing importance of organic cotton production.

For a list of organic agricultural land by country, sorted by importance, see Table 58, page 279, of 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net/basic-data.html.

World: Distributions of the countries‘ shares of organic land 2007 (142 countries)



FiBL Source: FiBL & IFOAM Survey 2009

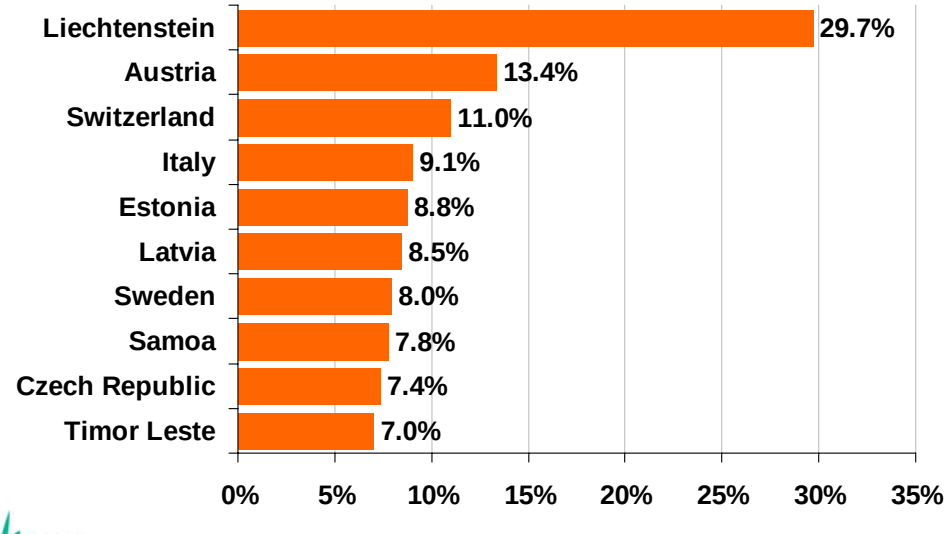
In more than two thirds of the countries included in the global organic survey, less than one percent of the agricultural land is organic.

Only three countries have a higher share than ten percent: Liechtenstein (almost 30 percent), Austria (13.4 percent) and Switzerland (11 percent).

The highest shares are in the countries of Europe: Here 66 percent of the countries have more than 1 percent of organic land.

For a list of the organic share of the total agricultural land by country, sorted by importance, see Table 59, page 281, in ‘The World of Organic Agriculture’, 2009 edition, or www.organic-world.net/basic-data.html.

World: The ten countries with the highest shares of organic agricultural land 2007



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Source: FiBL & IFOAM Survey 2009

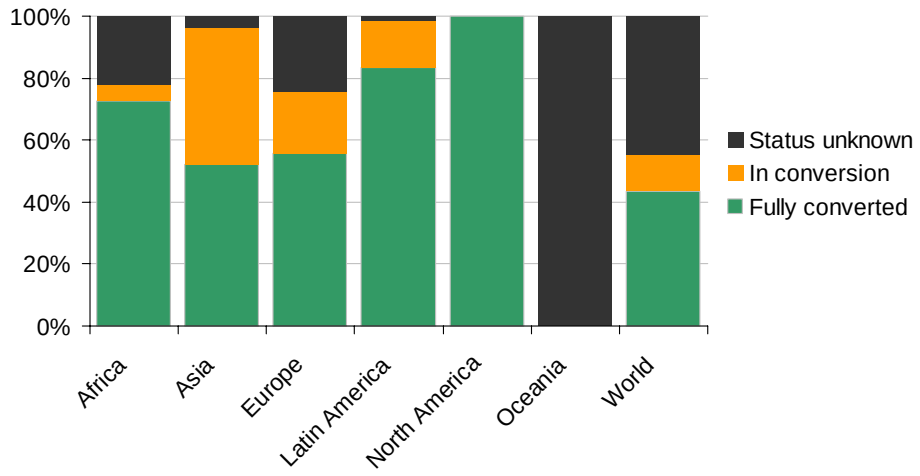
Almost 30% of the agricultural land in Liechtenstein is organic, followed by Austria (13.4%) and Switzerland (11%).

It is notable that most of the countries with high shares of organic land are in Europe with its strong market and high levels of government support.

It is interesting to note that several small island states are also reaching high shares.

For a list of the organic share of the total agricultural land by country, sorted by importance, see Table 59, page 281, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net/basic-data.html.

Conversion status of organically managed land 2007



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Source: FiBL & IFOAM Survey 2009

Data provided on the conversion status of the organic land were collected and processed for the first time on a global level.

The area in conversion shows what extent of future supply of the organic market can be expected.

Experts were asked to provide for all crops:

- Total certified organically managed land;
- Certified land in conversion;
- Certified, fully converted land.

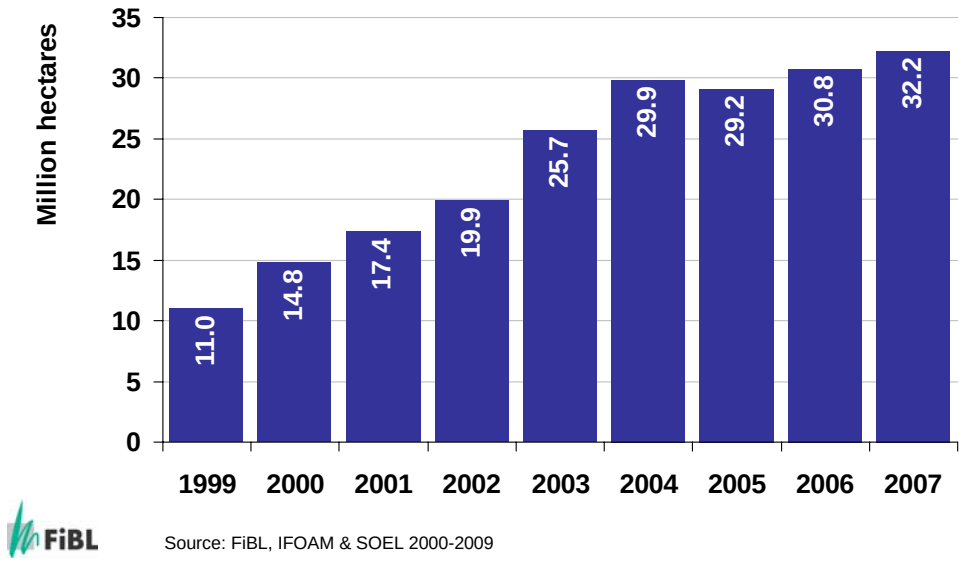
It should be noted that:

- Information on the conversion status was not available for all countries;
- Some countries only provided data on the fully converted land (for instance the US, Argentina, Chile and Uruguay);
- For some countries data were collated from several certifiers, some of which provided information on the conversion status whereas others did not.
- 86 of 142 countries made the requested details available. Of these 86 countries, 16 provided only data on the fully converted area, in which case the conversion area is not known.

The above graph can only give an idea of the overall picture and the data availability on this issue in general. More important are the in-conversion data on a country and on crop levels, showing from which countries and for which crops supply may be expected in the near future.

For a list showing the conversion status of the organic land by country,

World: Development of organic agricultural land 1999-2007 (Revision date: May 2009)



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Source: FiBL, IFOAM & SOEL 2000-2009

Compared to 2006, there has been an increase in organic agricultural land of 1.5 million hectares.

In 2007, the organic land increased in more than 80 countries.

Since 1999, the organic agricultural land has trebled.

The data are constantly revised as for many countries information is becoming available in retrospect. The graph reflects the status of the revision process per May 2009.

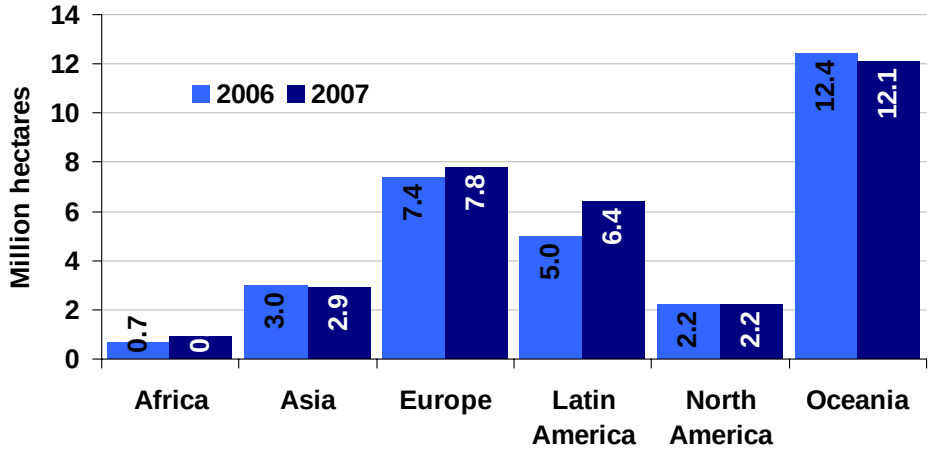
The following should be noted:

•During 2003 the organic land in Australia increased by 5 million hectares; this explains the major increase in that year.

•During 2004, the organic area in China increased by more than 2 million hectares; this partly explains the major increase during that year.

•During 2005, there was a drop of the organic area in China (-1.2 million hectares) and in Australia (-0.36 million hectares), mainly extensively managed grazing areas which are not of major relevance to the organic market. In spite of growth in most countries during that year the global organic land area went down, due to the decrease of grassland under organic management in the countries mentioned above.

World: Development of organic agricultural land 2006 to 2007 by geographical region



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Source: FiBL & IFOAM Survey 2009

The largest increases during 2007 were in:

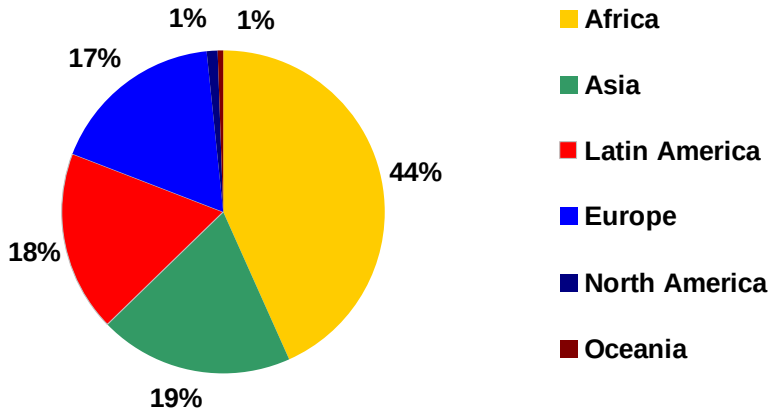
- Latin America (1.4 million hectares, including 0.8 million hectares of in-conversion land in Brazil which were previously not reported)
- 0.3 million hectares in Europe
- 0.2 million hectares in Africa

In China the organic land area decreased, due to the fact that for 2007 the authority in charge did not include farms & land certified solely according to the standards of foreign certifiers. Furthermore the aquaculture area was deducted (0.4 million hectares for China).

North America: Data for 2006 and 2007 for the US will be made available in the summer of 2009.

For data on the growth of organically managed agricultural land by region from 2006 to 2007, see Table 2, page 31, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net/basic-data.html.

World: Organic producers by geographical region 2007



Source: FiBL & IFOAM Survey 2009

1.2 million organic producers, including smallholders, were reported for 2007.

Almost half of the producers are in Africa, followed by Latin America and Europe.

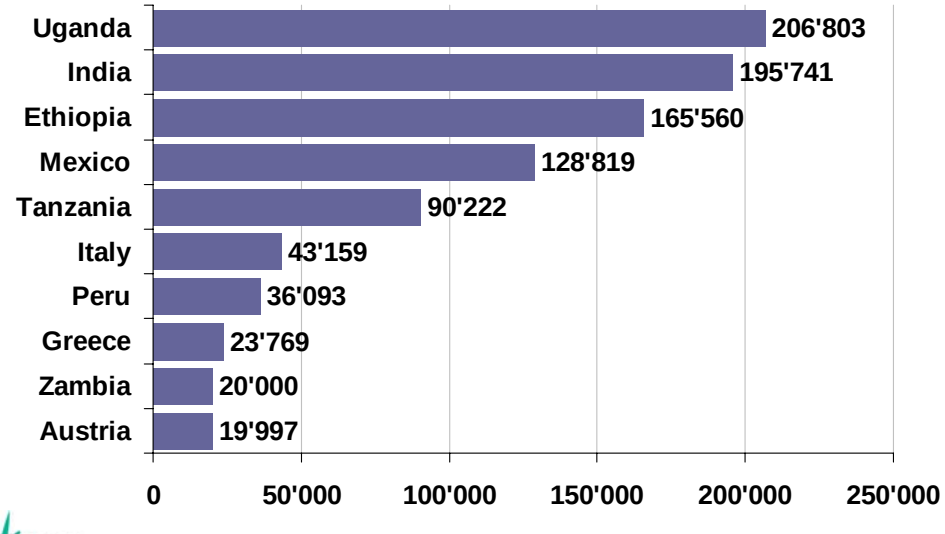
Obtaining precise figures on the number of organic farms remains difficult, as some countries report the number of smallholders, and others only the numbers of companies, projects or grower groups, which may each comprise a number of producers.

Some countries provide the number of producers per crop, and there may be overlaps for those growers who grow several crops.

The global number of organic producers should consequently be treated with caution.

For data on the numbers of farms by geographical region, see Table 1, page 27, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net/basic-data.html.

World: The ten countries with the largest numbers of organic producers 2007



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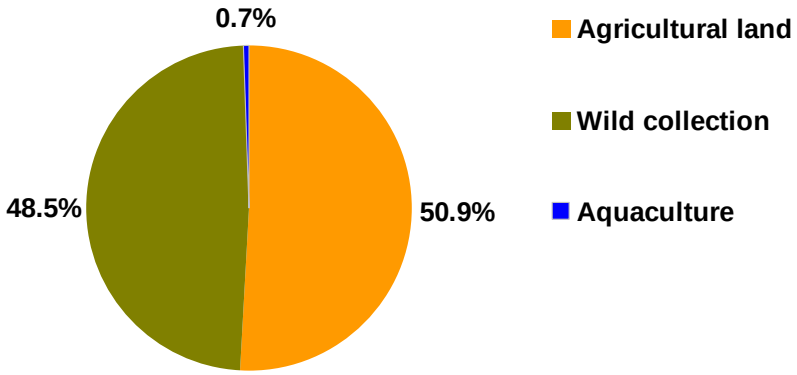
Source: FiBL & IFOAM Survey 2009

The country with the most producers is Uganda, followed by India, Ethiopia and Mexico.

Whereas in Africa and Latin America farm sizes are small, in Australia and North America farms are characterized by large sizes.

For a list of organic producers by country, sorted by importance, see Table 60, page 283, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net/basic-data.html.

World: Use of total land under organic certification (63.3 million hectares) 2007



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Source: FiBL & IFOAM Survey 2009

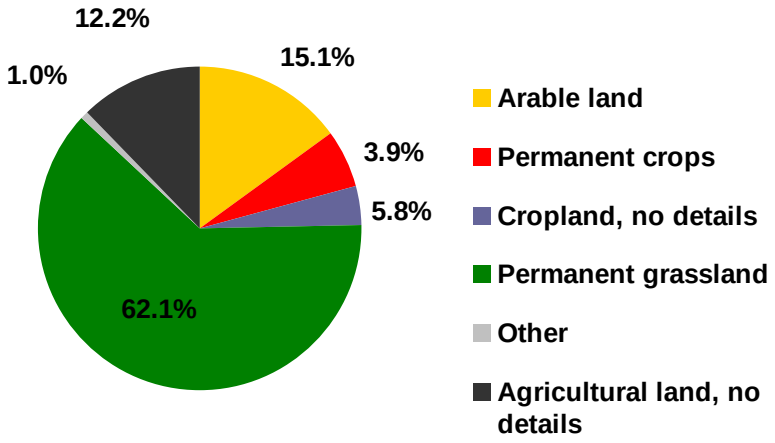
Most of the world's certified organic area is agricultural land: 32.2 million hectares, constituting 50.9 percent of the certified area.

30.7 million hectares are wild collection areas, which are not managed or used agriculturally. These areas constitute 48.5 percent of the world's certified area.

0.4 million hectares or 0.7 percent of the certified area are aquaculture.

For data on the organically managed agricultural area by main use (agriculture, wild collection, aquaculture) and geographical region in 2007 see Table 3, page 35, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net/basic-data.html.

World: Use of organic agricultural land 2007 (32.2 million hectares)



FiBL Source: FiBL & IFOAM Survey 2009

Land use details were available for approximately 90 percent of the organically managed agricultural area.*

62 percent of the world's agricultural land is grassland/grazing lands (20 million hectares).

The cropped area (arable and permanent crops) amounts to 7.8 million hectares, constituting one quarter of the world's organic agricultural land.

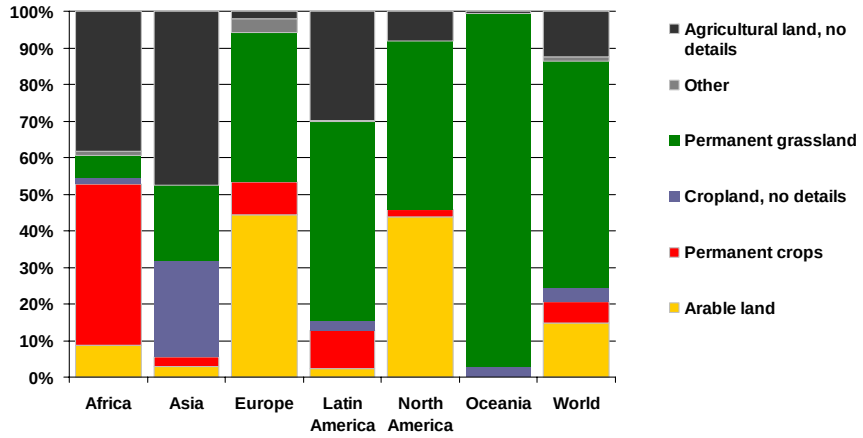
For 12 percent of the agricultural land reported, no land use details were available at all.

*It should be noted, that

- Land use & crop information is not available for every country, and for some major producing countries (India, Brazil) such data are missing, even though they provided the total area under organic management.
- Even though some countries provide general land use details, detailed crop information is not necessarily available. For Australia, for instance, there is only a rough estimate that 97% of the country's agricultural land is grazing land.

For data on the organically managed agricultural area by main land use type and geographical region in 2007 see Table 3, page 35, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net/basic-data.html .

Agricultural land use by geographical region in organic agriculture 2007



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Source: FiBL & IFOAM Survey 2009

The chart of the share of land use types in the geographical regions shows:

• For a large part of the organic agricultural land in both Africa and Asia, land use information is not available. In addition, for Asia (mainly China) no details on the uses of the cropped land are available.

• Africa has a large proportion of permanent crops; these are mainly cash crops such as coffee, tropical fruit and olives.

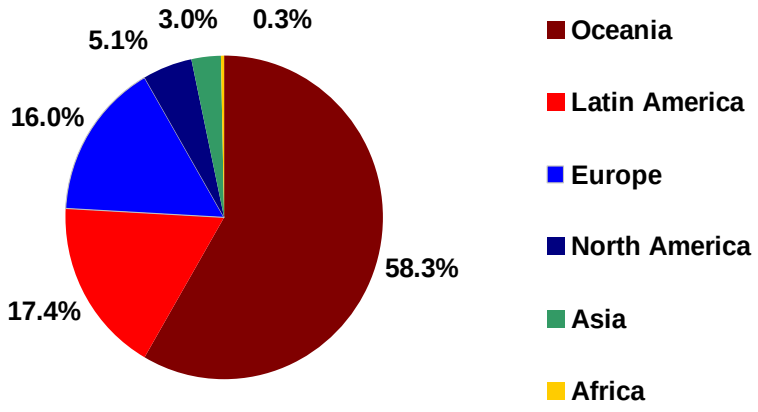
• Europe and North America use about half of their organic agricultural land as grassland, and the other half is arable land. In Europe the share of permanent crops is higher than in North America, mainly due to olives and vines grown in the Mediterranean countries.

• Latin America has little arable land compared to the large grazing areas (Uruguay and Argentina). It has a comparatively high share of permanent crops (mainly coffee).

• Oceania is characterized by the large grazing areas of Australia. The Pacific Islands produce a large range of tropical crops; New Zealand produces a lot of fruit.

For data on the organically managed agricultural area by main land use type and geographical region in 2007 see Table 3, page 35, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net/basic-data.html. .

Organic permanent grassland by geographical region 2007 (total 20 million hectares)



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Source: FiBL & IFOAM Survey 2009

Permanent grassland/grazing areas (20 million hectares) account for at least 62 percent of the world's organically managed land.

This is a lower share than for total agriculture, where permanent grassland accounts for 68 percent of the agricultural land.

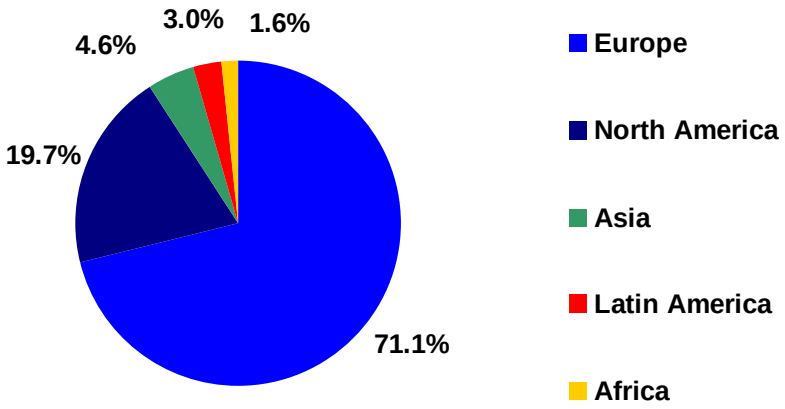
Compared with the 2006 data, 0.8 million hectares less permanent grassland were reported.

More than half of the grassland/grazing areas are in Australia (11.7 million hectares).

Furthermore, large areas of permanent grassland (including rough grazing areas) are in Latin America (3.5 million hectares) and Europe (3.2 million hectares).

For data on the organically managed grassland by geographical region in 2007 see Table 3, page 35 in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net/basic-data.html.

Organic arable land by geographical region 2007 (total 4.7 million hectares)



FiBL Source: FiBL & IFOAM Survey 2009

With a total of at least 4.7 million hectares, arable land accounts for 15 percent of the organic agricultural land (and 18 percent of the organic area for which land use information was available).

This is less than for total agriculture, where arable land constitutes 28 percent of the agricultural area (calculated on the basis of the data provided by FAOSTAT).

The organic arable land accounts for 0.3 percent of the world's arable land.

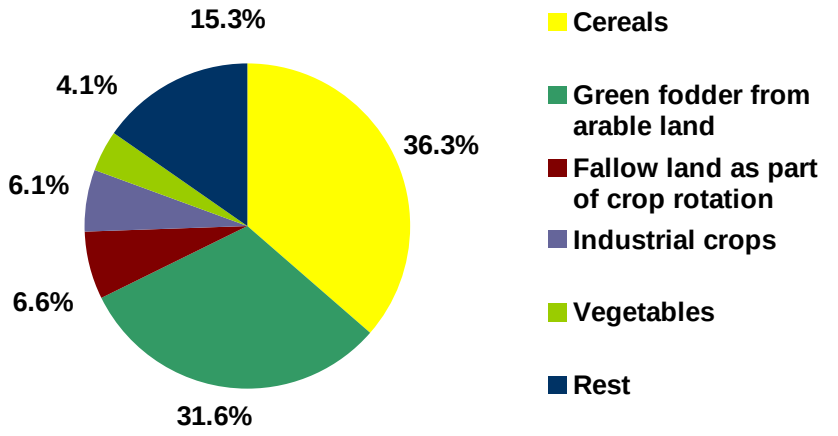
Compared with data for 2006, 0.3 million more hectares of arable crops were reported – which is more than a seven percent increase.

Most of the world's organically managed arable land is in

- Europe (3.5 million hectares), followed by
- North America (almost 1 million hectares) and
- Latin America (0.15 million hectares).

For data on the organically managed arable land by geographical region in 2007 see Table 3, page 35, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net/basic-data.html.

Organic arable land worldwide by main crop types 2007 (total 4.7 million hectares)



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Source: FiBL & IFOAM Survey 2009

Most of of the organic arable land (4.7 million hectares) is used for

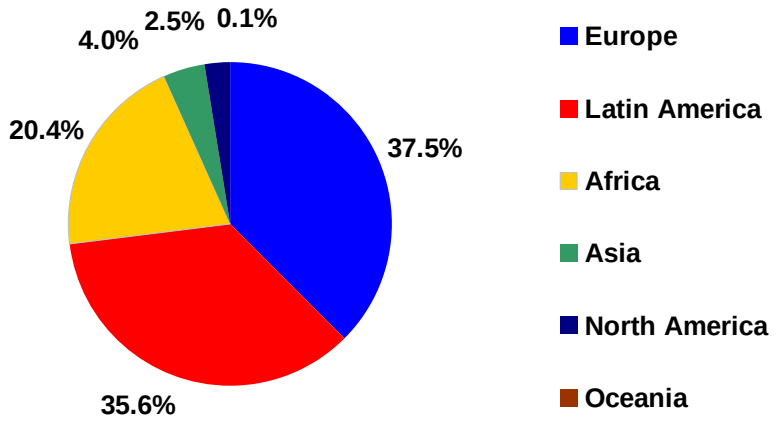
- Cereals including rice (1.8 million hectares), followed by
- Field fodder crops (1.5 million hectares) and
- Vegetables (0.2 million hectares).

Compared with the previous FiBL-IFOAM survey (data 2006), more land was reported for

- Green fodder from arable land (+0.24 million hectares);
- Medicinal plants (+100,000 hectares);
- Cereals (+40,000 hectares);
- Industrial crops such as cotton (+36,000 hectares);
- Vegetables (+26,000 hectares).

For data on the global organically managed arable cropland by crop category and the organically managed agricultural area by main use in 2007 see Table 4, page 37, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net.

Organic permanent cropland by geographical region 2007 (total 1.9 million hectares)



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Source: FiBL & IFOAM Survey 2009

Permanent crops (1.87 million hectares) account for at least six percent of the organically managed agricultural land, amounting to almost two million hectares.

In organic agriculture, permanent cropland has a higher share than in total agriculture, where permanent crops account for approximately three percent of the agricultural land.

The organic permanent cropland constitutes 1.3 percent of the world's permanent cropland.

Most of the permanent cropland is in

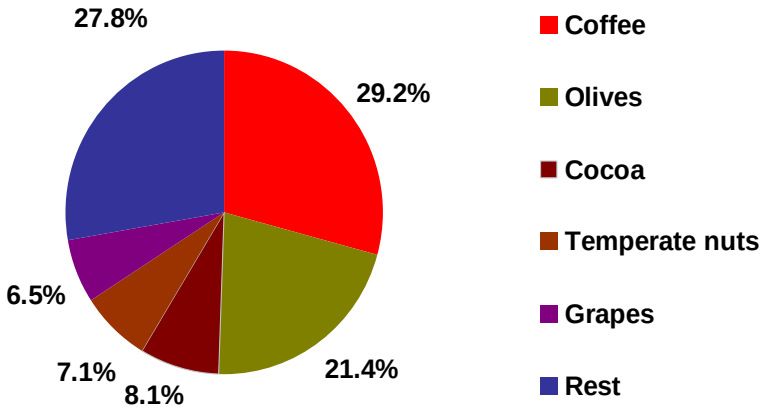
- Europe (0.7 million hectares), followed by
- Latin America (0.67 million hectares) and
- Africa (0.38 million hectares).

Compared with the previous FiBL-IFOAM survey, 0.4 million hectares more were reported (+30 percent).

Particular increases compared with the previous survey were reported for coffee.

For data on the organically managed permanent cropland by geographical region in 2007 see Table 3, page 35, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net/basic-data.html.

Organic permanent cropland by main crop types 2007 (total 1.9 million hectares)



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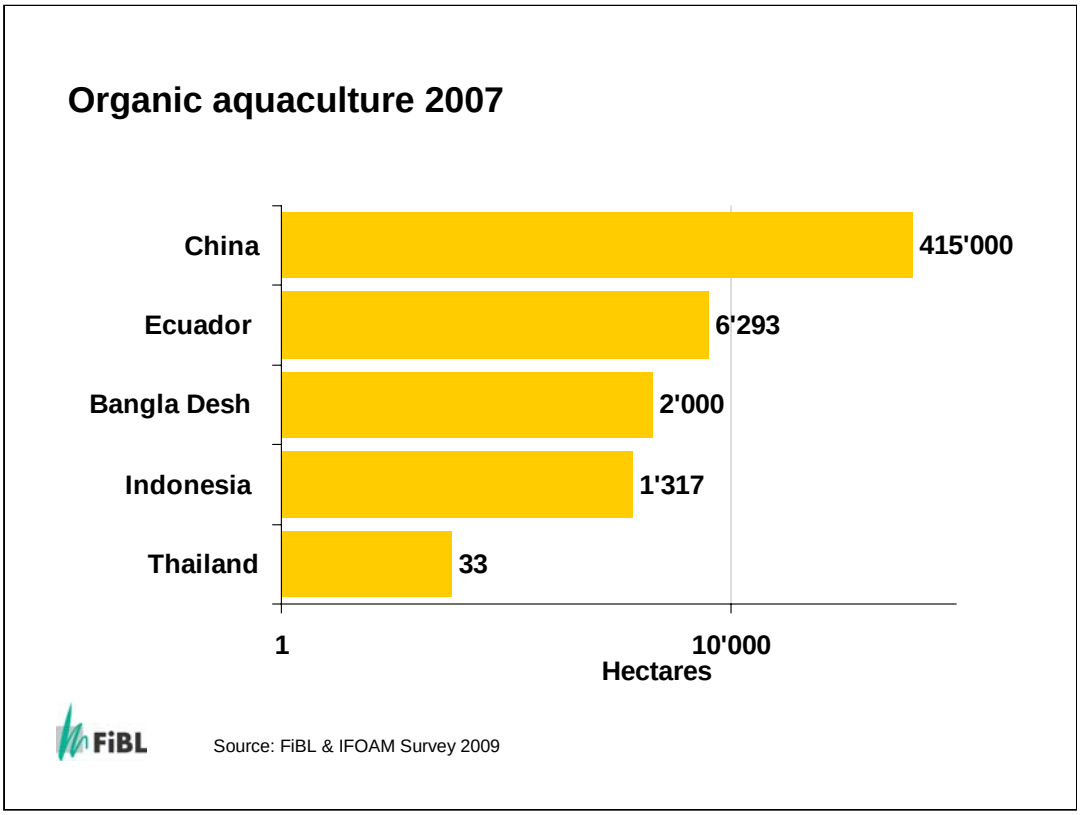
Source: FiBL & IFOAM Survey 2009

The most important permanent crops (1.87 million hectares) are

- Coffee (0.6 million hectares: constituting more than a quarter of the organic permanent cropland and 5.3 percent of the world's harvested coffee area), followed by
- Olives (0.4 million hectares: 5.3 percent of the world's harvested olive area),
- Cocoa (0.15 million hectares: two percent of the harvested cocoa bean area),
- Temperate nuts (0.13 million hectares) and
- Grapes (0.12 million hectares).

For data on the global organically managed permanent cropland by crop category and the organically managed agricultural area by main use in 2007, see Table 4, page 37, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net.



A total of 0.4 million hectares of organic aquaculture area were reported for the global organic survey.

Since the mid-1990s, the progression of certified organic aquaculture has been characterized by a steady increase of product volumes on the market.

Organic aquaculture gradually lost its image as a niche activity, and bigger retail companies in Germany, the United Kingdom and Switzerland added aquaculture products into their assortment, which in turn encouraged more producers in many countries to convert to organic production.

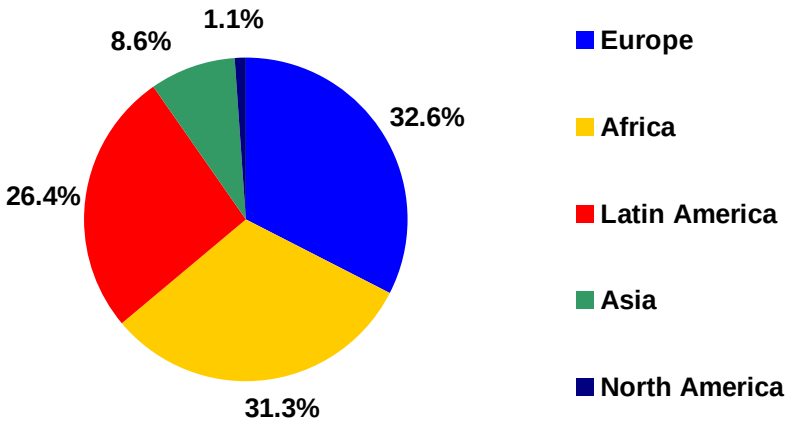
However, only a small number of countries provided data on their areas used for aquaculture: Bangladesh, China, Ecuador, Indonesia, Thailand.

It should be noted that organic aquaculture is present in far more countries, which perhaps did not report their activities as the FiBL & IFOAM survey is primarily concerned with organic agricultural land.

Further reading: Bergleiter, S. (2008): Organic Aquaculture. In: FiBL/IFOAM: The World of Organic Agriculture. Statistics and Emerging Trends 2008. Bonn and Frick

For data on the organically managed agricultural area by main use (agriculture, wild collection, aquaculture) and geographical region in 2007 see Table 3, page 35, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net/basic-data.html.

Organic wild collection & bee-keeping areas: Distribution by geographical region 2007



FiBL

Source: FiBL & IFOAM Survey 2009

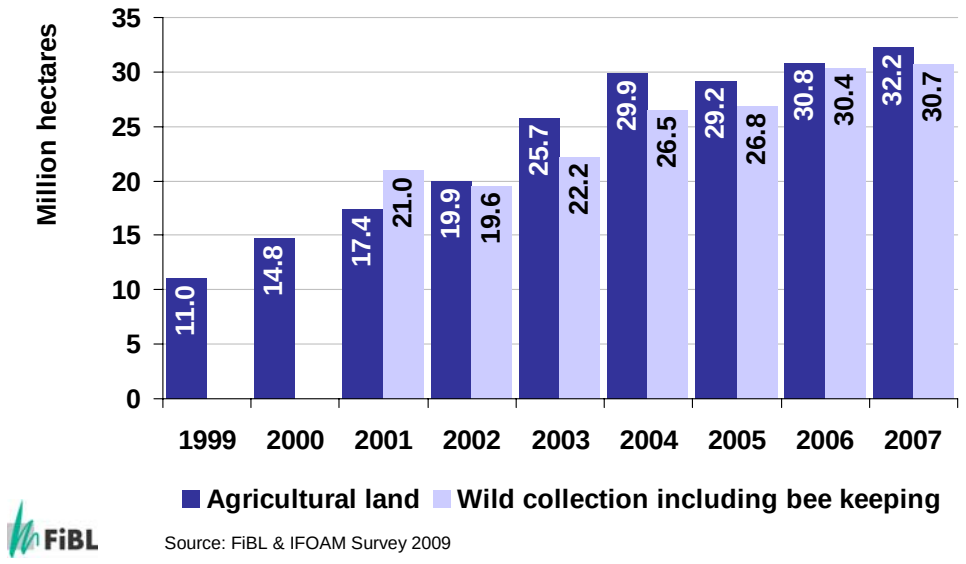
30.7 million hectares of wild collection and bee-keeping areas were reported for 2007, constituting an increase of 0.3 million hectares compared with 2006.

The wild collection / bee-keeping areas are more or less evenly distributed over four geographical regions: Africa, Asia, Europe and Latin America, reflecting quite a different pattern than that for agricultural land. The collection of wild harvested crops is defined in the IFOAM Basic Standards (IFOAM 2006), and wild collection activities are regulated in organic laws.

For data on the organically managed agricultural area by main use (agriculture, wild collection, aquaculture) and geographical region in 2007 see Table 3, page 35, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net/basic-data.html.

For global data on organic wild collection and bee-keeping products, see Table 7, page 41, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net/basic-data.html.

World: Development of organic agricultural land and wild collection & bee-keeping areas 1999 to 2007

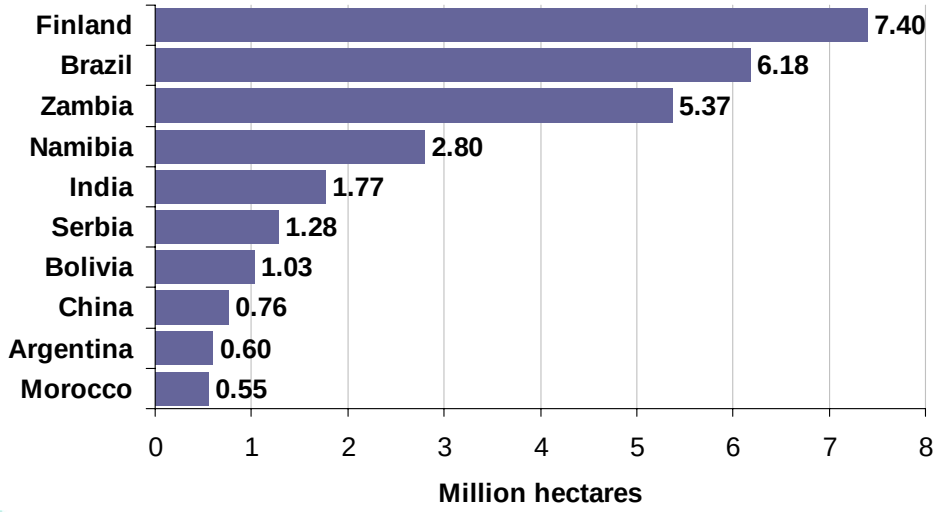


FiBL

Source: FiBL & IFOAM Survey 2009

Like the agricultural land, the organic wild collection and bee-keeping areas have increased steadily over the past years.

Organic wild collection: The ten countries with the largest wild collection areas (including bee-keeping) 2007



FiBL

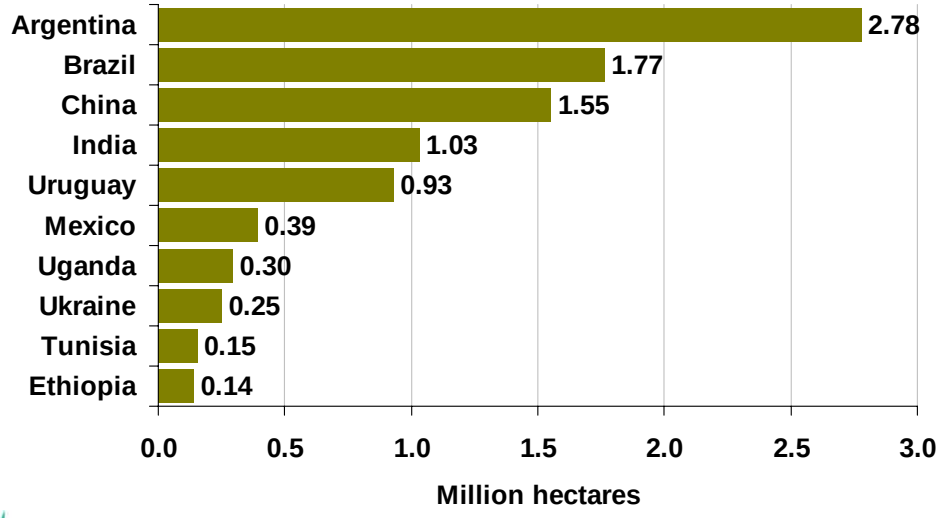
Source: FiBL & IFOAM Survey 2009

The countries with the largest areas are Finland (mainly berries), followed by Brazil and Zambia (bee-keeping).

Tables on the importance of organic wild harvested products by country are available in 'The World of Organic Agriculture 2009' as well as at www.organic-world.net:

- *Table 28: Africa: Wild collection areas and bee-keeping 2007, page 126*
- *Table 35: Asia: Wild collection areas 2007, page 146*
- *Table 39: Europe: Organic wild collection areas 2007, page 173*
- *Table 48: Latin America: Wild collection areas and bee-keeping 2007, page 223*

Developing countries: The ten countries with the largest areas of organically managed land 2007



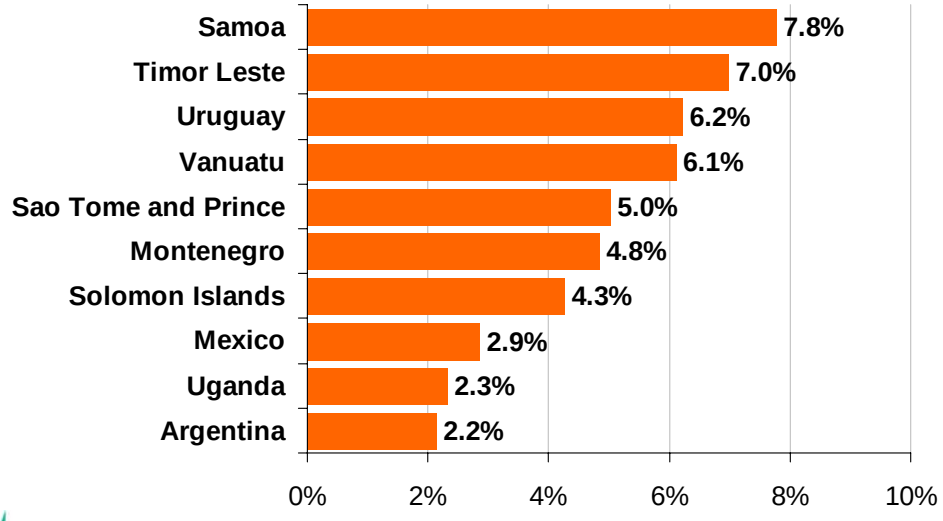
FiBL

Source: FiBL & IFOAM 2009

For the chapter on organic farming in developing countries, the data of the countries listed in the List of Recipients of Official Development Assistance (ODA) of the Development Assistance Committee (DAC) of the Organization for Economic Cooperation and Development (OECD) were analysed. The list is available at www.oecd.org/dataoecd/23/34/37954893.pdf.

More than one quarter of the world's organically managed land - nine million hectares - is located in developing countries. Most of this land is in Latin American countries, with Asia and Africa in second and third place. Countries with the largest area under organic management are Argentina, Brazil, China, India and Uruguay, in that order of importance.

Developing countries: The countries with the highest shares of organic land 2007



FiBL

Source: FiBL & IFOAM 2009

However, when it comes to land under organic management as a percentage of total area under agriculture in developing countries, the order is totally different.

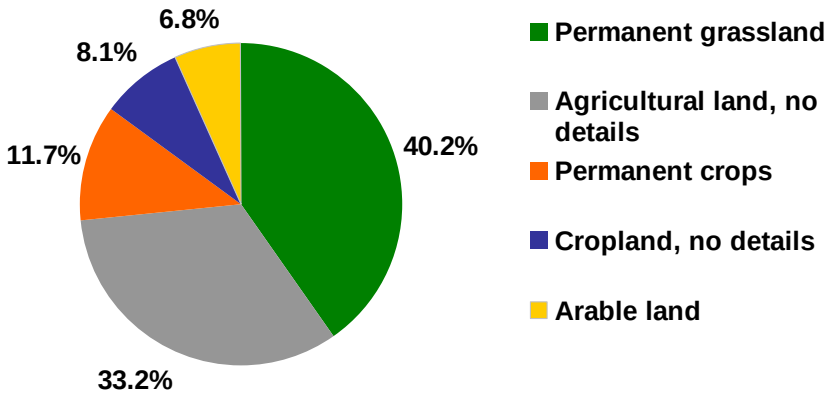
The highest percentages of organically managed land are in several Pacific Island countries, and in Timor Leste. Uruguay, the country with the fifth largest area under organic management in developing countries, has the third highest percentage of total land in agriculture.

Argentina, with by far the largest area under organic management with 2.78 million hectares, is tenth on the list of organically managed area relative to total agricultural area.

In these ten countries, the shares of organically managed land in relation to all agricultural land are comparable to those in Europe. These high shares can probably be attributed to a high potential for, and focus on, exports and to several support activities.

However, among the developing countries only a few have a share of organically managed land that is more than one percent of the agricultural area. Thus, compared with developed countries, organic farming lags behind in most developing countries.

Developing countries: Land use of organically managed land 2007

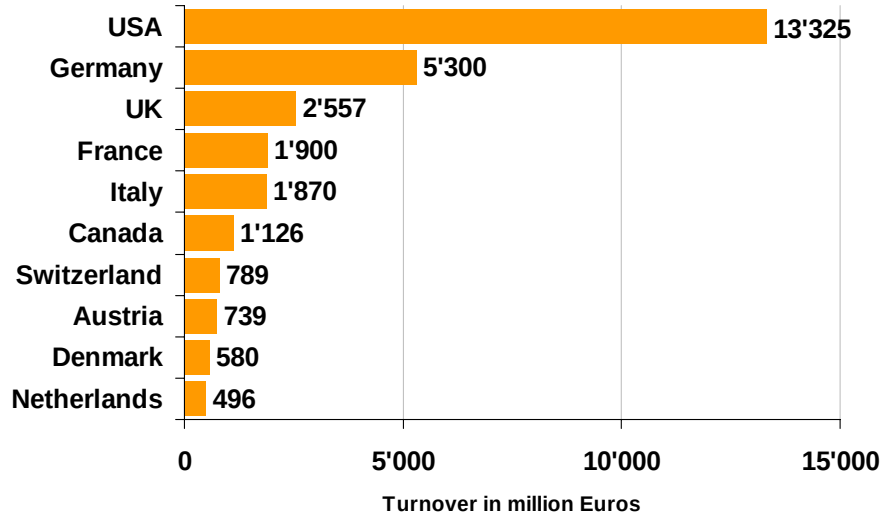


Source: FiBL & IFOAM 2009

Land use details were not available for all developing countries. However, the available statistics show that the shares of grassland (more than half of the organically managed land in these countries) and of permanent crops are relatively high as compared with Europe and North America. Arable land is of minor importance.

This can be attributed to the fact that export plays an important role - either for meat products (mainly from Latin America) or for permanent crops. The most important permanent crops are export crops, such as coffee, olives, cocoa and sugarcane.

Global organic market: The ten countries with the largest markets for organic food 2007



FiBL Source: FiBL Survey 2009

Global demand for organic products remains robust, with sales increasing by over five billion US dollars a year.

Organic Monitor estimates international sales to have reached 46.1 billion US dollars in 2007, thus having trebled since 1999.

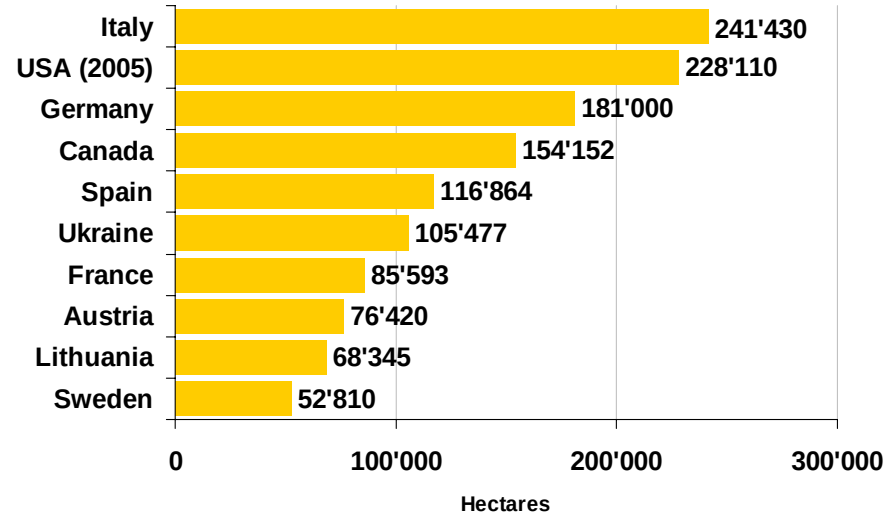
Consumer demand for organic products is concentrated in North America and Europe; according to Organic Monitor these two regions comprise 97 percent of global revenues.

Asia, Latin America and Australasia are important producers and exporters of organic foods.

The countries with the largest markets are the United States, followed by Germany and the UK.

Source: Amarjit Sahota: The Global Market for Organic Food & Drink. The World of Organic Agriculture 2009, IFOAM, FIBL, ITC

Organic cereals: The ten countries with the largest areas 2007



FiBL

Source: FiBL & IFOAM Survey 2009

In 2007, 1,778 million hectares of cereals were under organic management.

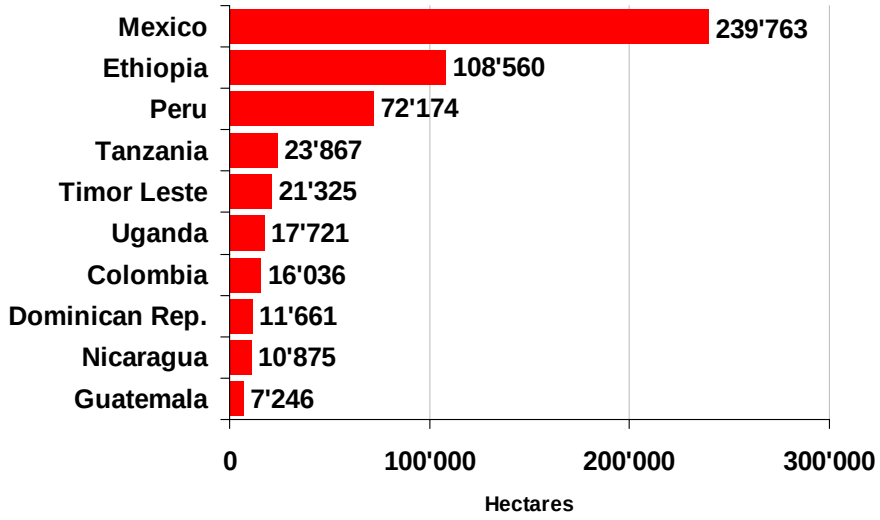
As some of the world's large cereal producers (such as India, China and the Russian Federation) did not provide land use details, it can be assumed that the area is actually larger.

0.3 percent of the total cereal area is under organic management (according to FAO 700 million hectares of cereals were harvested in 2007).

Some countries are, however, reaching higher shares: Portugal 12.2 percent; Austria 9.4 percent; Lithuania 6.8 percent; Italy 6.2 percent; and Latvia 5.5 percent.

For data on the organic cereal area per country see Table 8: Organic cereals, page 42, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net.

Organic coffee: The ten countries with the largest areas 2007



FiBL Source: FiBL & IFOAM Survey 2009

547,275 hectares of coffee were grown organically in 2007.

This constitutes 5.3 percent of the world's harvested coffee area of 10.2 million hectares in 2007.

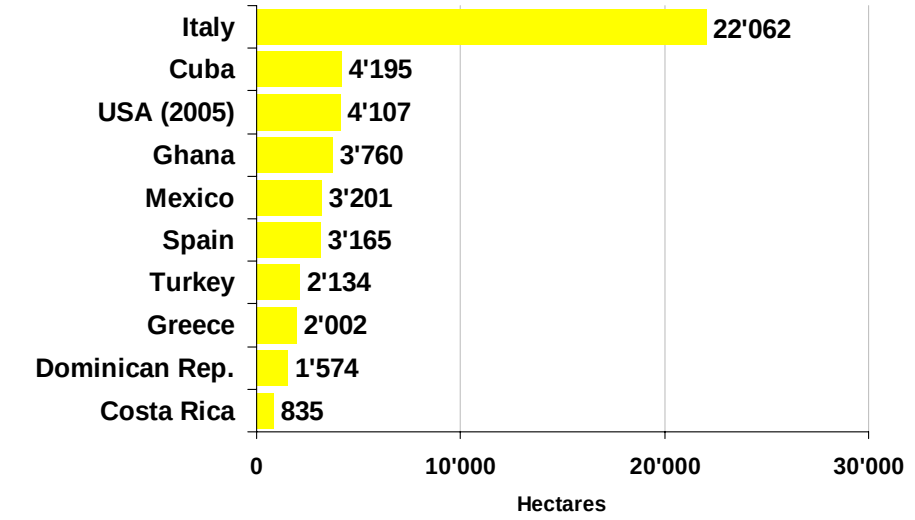
The largest organic coffee areas are in Mexico, Ethiopia and Peru.

Some countries are reaching high shares: 30 percent of Mexico's harvested coffee area is organic.

Data were not available for all major coffee-producing countries (the leading producers are Brazil, Indonesia, Mexico, Colombia and Vietnam).

For data on the organic coffee area per country see Table 12: Organic coffee, page 48, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net.

Organic citrus: The ten countries with the largest areas 2007



FiBL Source: FiBL & IFOAM Survey 2009

The area of organic citrus fruits includes oranges, lemons and limes, grapefruit and pomelos and ‘other citrus fruits’.

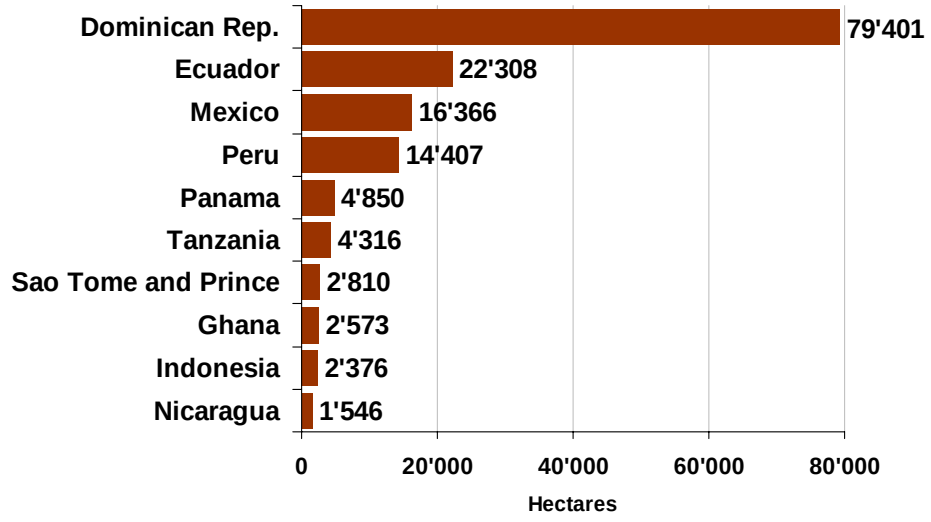
50,150 hectares of citrus fruit are grown organically worldwide. This constitutes 0.6 percent of the world’s citrus area of 8.3 million hectares (FAOSTAT).

The countries with the largest organic citrus areas are: Italy, Cuba and the United States.

As no crop details were available for some of the world’s leading citrus producers - China, Brazil, Nigeria and India, in that order of importance - it can be assumed that the world figures for areas under organic citrus are higher.

For data on the organic citrus fruit area per country see Table 9: Organic coffee, page 44, in ‘The World of Organic Agriculture’, 2009 edition, or www.organic-world.net.

Organic cocoa beans: The ten countries with the largest areas 2007



FiBL

Source: FiBL & IFOAM Survey 2009

Over 150,000 hectares of cocoa were grown organically in 2007.

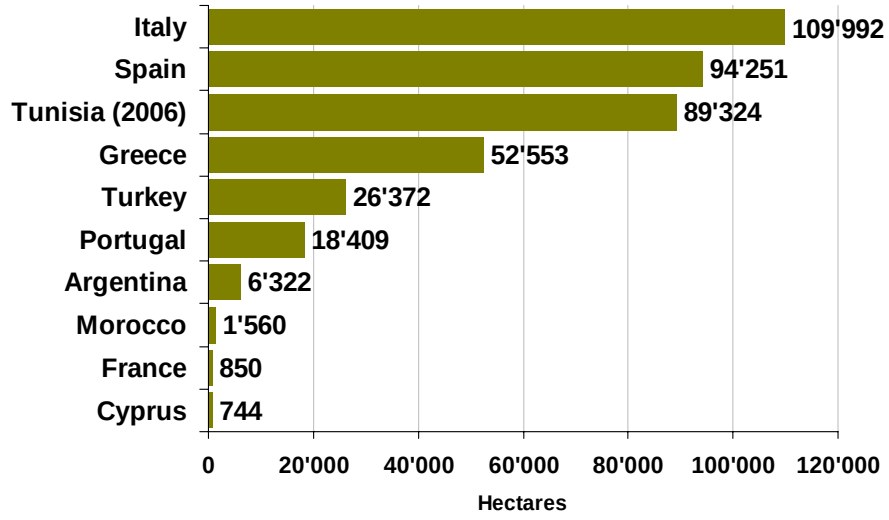
This constitutes two percent of the world's harvested cocoa bean area of 7.4 million hectares (FAOSTAT).

The leading producers are Ghana, Ivory Coast, Nigeria, Brazil and Indonesia, but data on the organic cocoa area were not available for all these countries.

The countries with the most organic cocoa beans are the Dominican Republic, Ecuador and Mexico.

For data on the organic cocoa area per country see Table 11: Organic cocoa, page 46, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net.

Organic olives: The ten countries with the largest areas 2007



FiBL

Source: FiBL & IFOAM Survey 2009

402,152 hectares of organic olives were grown in 2007.

This is approximately 5.2 percent of the world's total harvested olive area (7.7 million hectares, FAOSTAT).

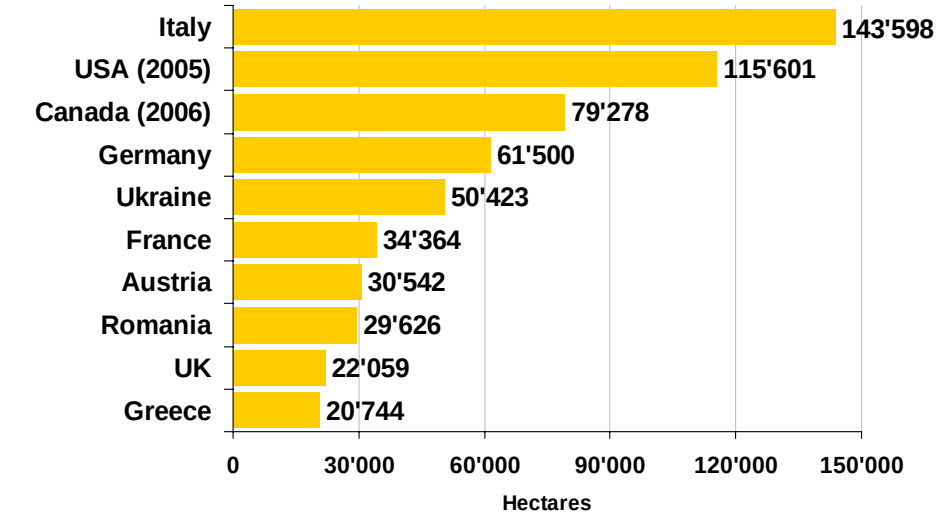
The main countries in which olives are grown are the countries of the Mediterranean, with Spain by far the largest grower, and Italy, Greece, Turkey and Morocco also important producers.

Although the same countries are important in organic production, the sequence is somewhat different. Italy has the largest area under organic olives, with Spain and Tunisia close behind.

The highest percentage for organic olives is in Italy (9.5 percent), followed by Greece (6.6 percent), Turkey (4.3 percent) and Spain (3.4 percent).

For data on the organic olive area per country see Table 14: Organic cocoa, page 49, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net.

Organic Wheat: The ten countries with the largest areas 2007



FiBL

Source: FiBL & IFOAM Survey 2009

Of the six most important wheat growers in the world, only the US provided data on the area under organic wheat grown in 2005.

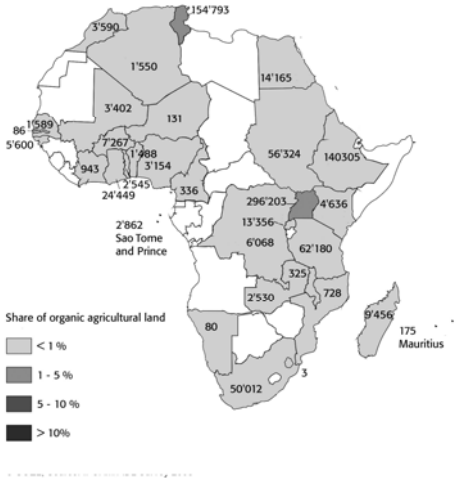
It is therefore not surprising that the total area under organic wheat recorded here (700,000 hectares) is only 0.3 percent of the total area of wheat grown in the world (217.5 million hectares, FAOSTAT). India, the Russian Federation, China, Kazakhstan and Australia are among the world's largest wheat growers, but did not provide data on organic wheat.

The largest organic wheat growers for which data are available (US, Canada, Turkey, Pakistan, Ukraine, Argentina and France) all had less than one percent of their total wheat areas under organic management.

The largest proportion of organic wheat area can be found in Austria (10.4 percent), followed by Italy (7.1 percent). The rest of the countries recorded less than five percent.

For data on the organic wheat area per country see Table 15: Organic wheat, page 50, in 'The World of Organic Agriculture', 2009 edition, or www.organic-world.net.

Africa: Land under organic management (ha) in the countries of Africa 2007



Source: IFOAM and FiBL 2009

In Africa in 2007, almost 0.9 million hectares – about 3 percent of the world's organic agricultural land – were certified organic.

This constitutes an increase of more than 185,000 hectares compared to 2006.

The countries with the largest organic agricultural land area are Uganda (296,203 hectares), Tunisia (154,793 hectares), Ethiopia (140,308 hectares) and Tanzania (62,180 hectares), where almost three-quarters of the region's organic land is concentrated.

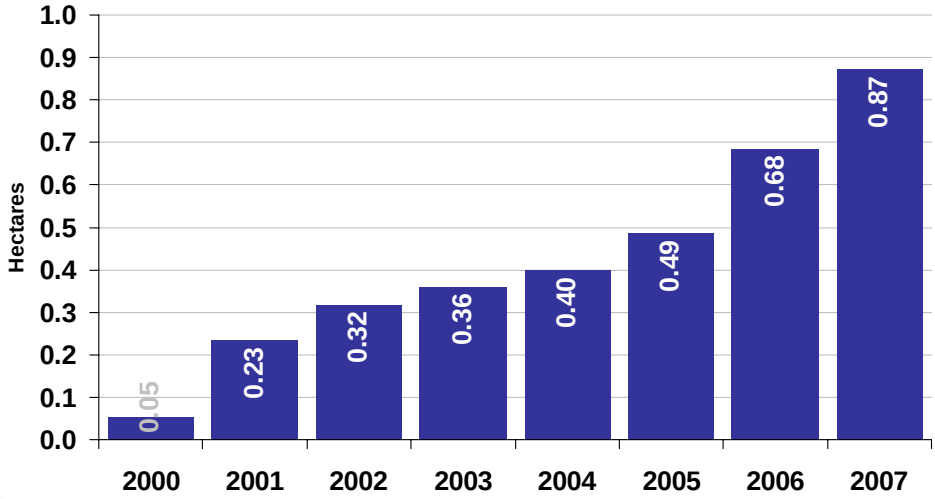
Only one country (Sao Tome and Principe) has more than 5 percent of its land organic.

In addition to the agricultural land, 9.6 million hectares of land are certified for bee-keeping, forest and wild collection

Further reading:

Hervé Bouagnimbeck: Organic Farming in Africa. In: The World of Organic Agriculture 2009. IFOAM/FiBL/ITC, Bonn, Frick, Geneva

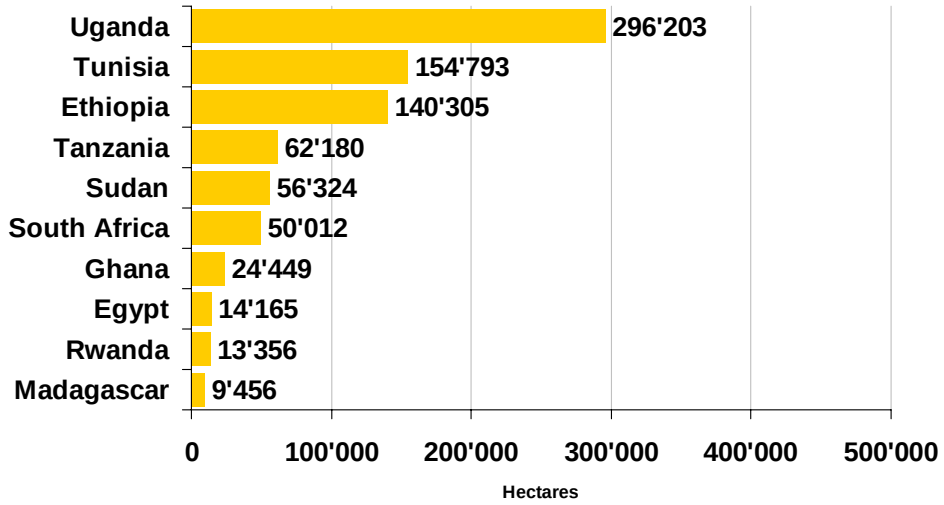
Africa: Development of organically managed agricultural land 2000-2007



FiBL

Source: IFOAM and FiBL 2009

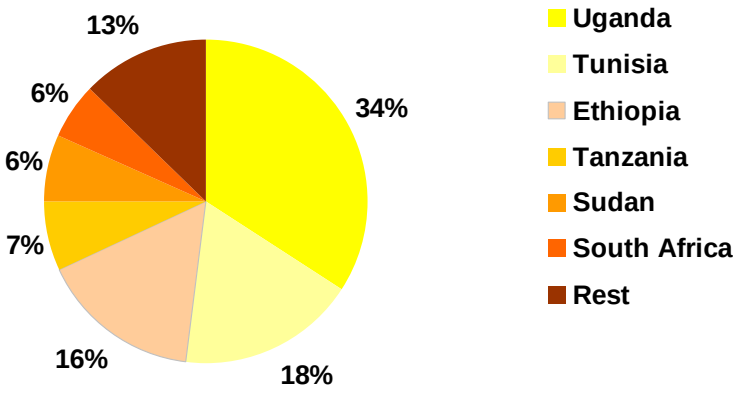
Africa: The ten countries with the most organic agricultural land 2007



FiBL

Source: IFOAM and FiBL 2009

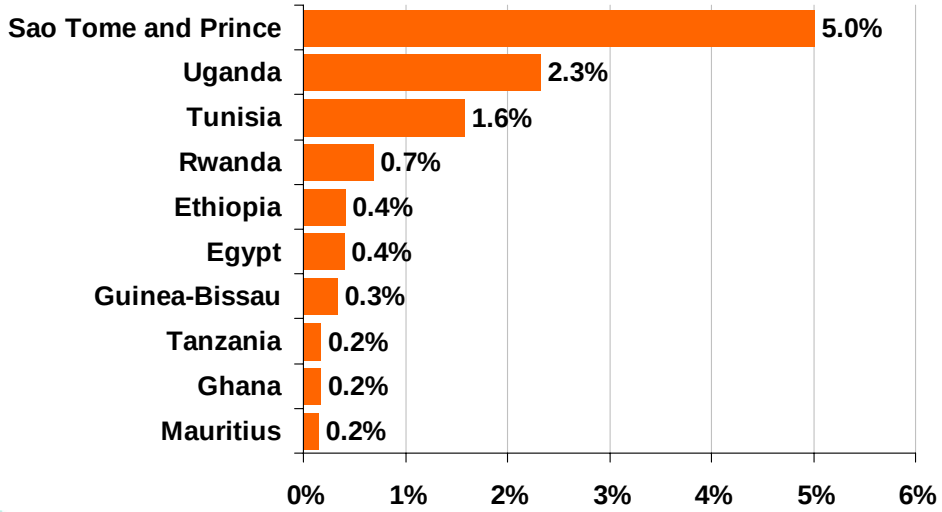
Africa: Distribution of organically managed land by country 2007 (total: 870,000 ha)



FiBL

Source: IFOAM and FiBL 2009

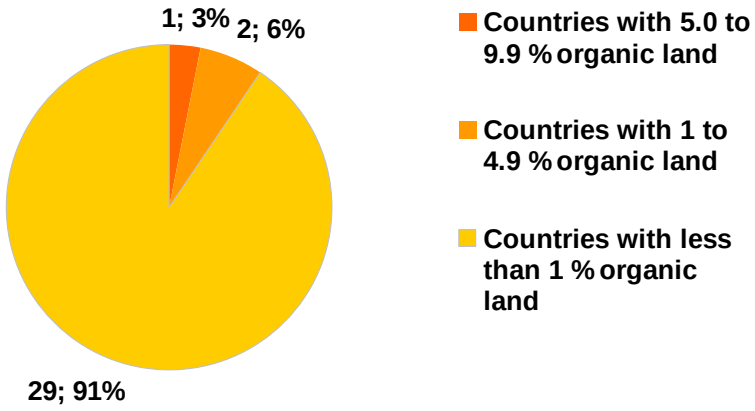
Africa: The ten countries with the highest shares of organic agricultural land 2007



FiBL

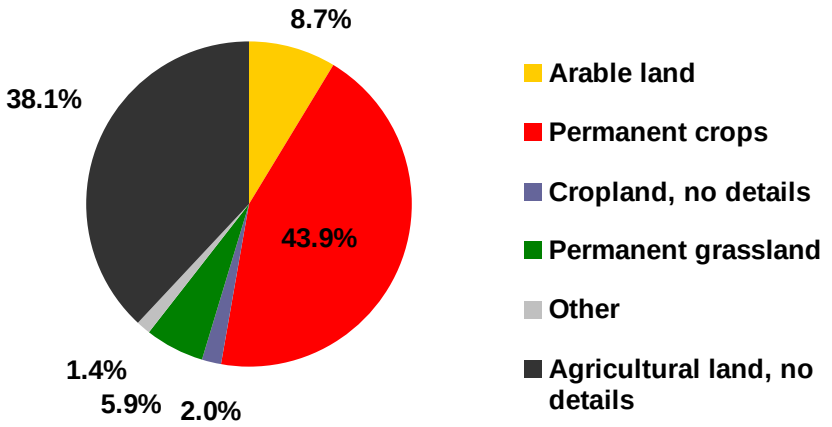
Source: IFOAM and FiBL 2009

Africa: Distribution of the countries‘ shares of organic land 2007 (by country)



Source: IFOAM and FiBL 2009

Africa: Use of organic agricultural land 2007 (0.87 million hectares)



FiBL

Source: IFOAM and FiBL 2009

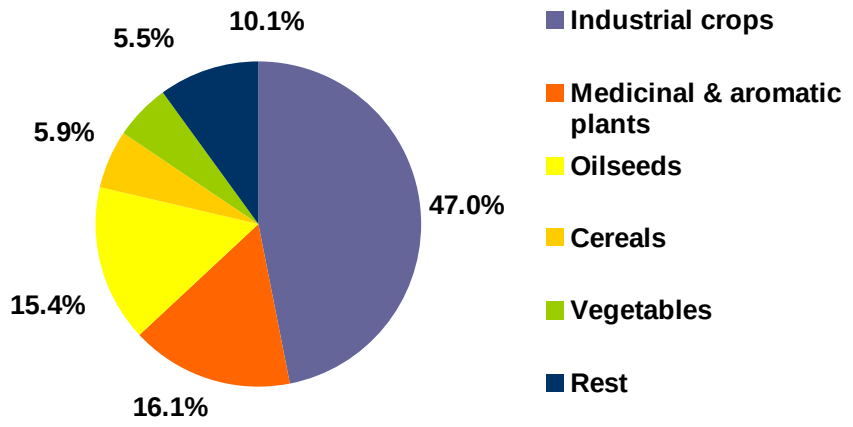
For Africa, land use information covering about half of the organic agricultural land was available (0.87 million hectares).

Most of this land is used for permanent crops (0.382 million hectares).

The main permanent crops are cash crops such as coffee and olives.

76,000 hectares are arable land.

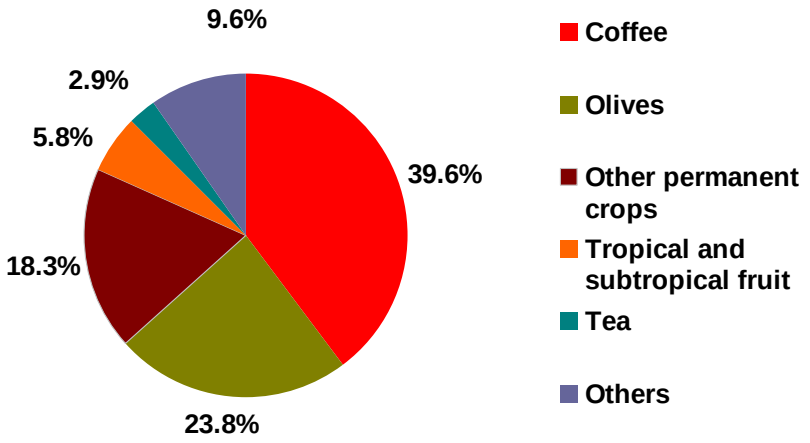
Africa: Use of arable land 2007 (78,000 hectares)



FiBL

Source: IFOAM and FiBL 2009

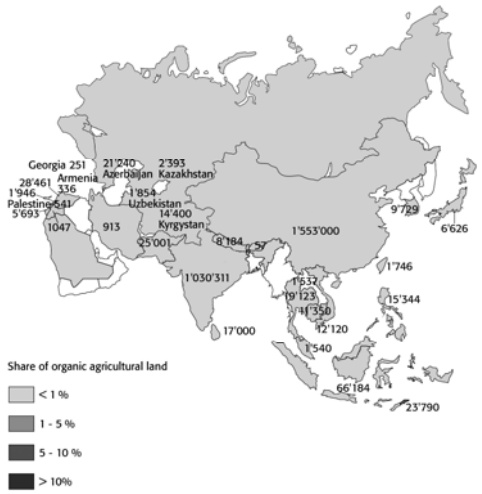
Africa: Use of permanent cropland (0.38 million hectares)



FiBL

Source: IFOAM and FiBL 2009

Land under organic management (ha) in the countries of Asia 2007



FiBL

Source: FiBL Survey 2009

The total organic area in Asia is nearly 2.9 million hectares. This constitutes nine percent of the world's organic agricultural land. 230,000 producers were reported.

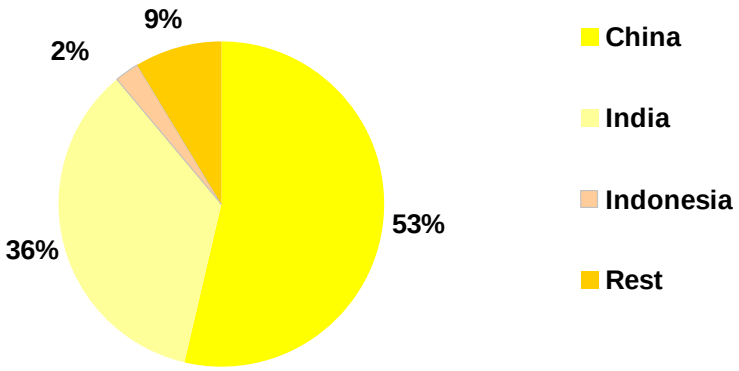
The leading countries are China (1.6 million hectares) and India (1 million hectares). It should be noted that in addition to China's organic agricultural land a further 0.4 million hectares are certified aquaculture areas.

The highest shares of organic land in relation to all agricultural land are in Timor Leste (seven percent).

Further reading:

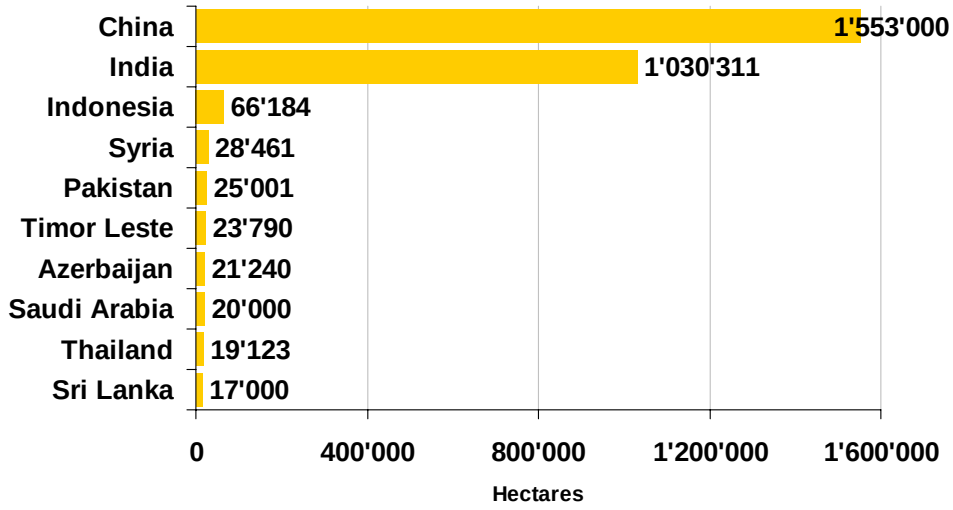
Ong Kung Wai: Organic Asia - From Back to Nature Movement & Fringe Export to Domestic Market Trend . In: The World of Organic Agriculture 2009. IFOAM/FiBL/ITC, Bonn, Frick, Geneva

Asia: Distribution of organically managed agricultural land by country 2007; total: 2.9 million hectares



Source: FiBL 2009

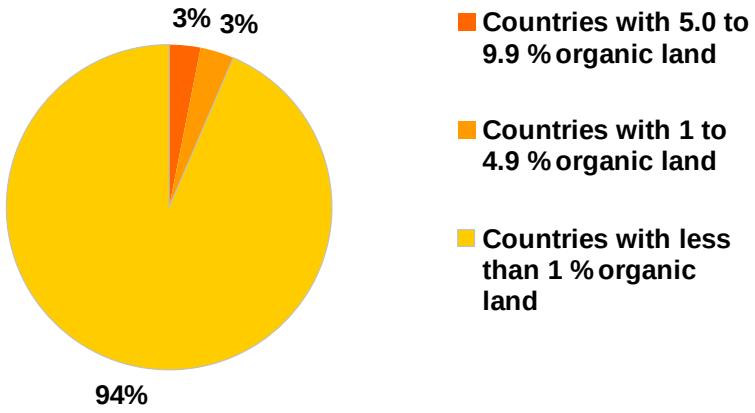
Asia: The ten countries with the most organic agricultural land 2007



FiBL

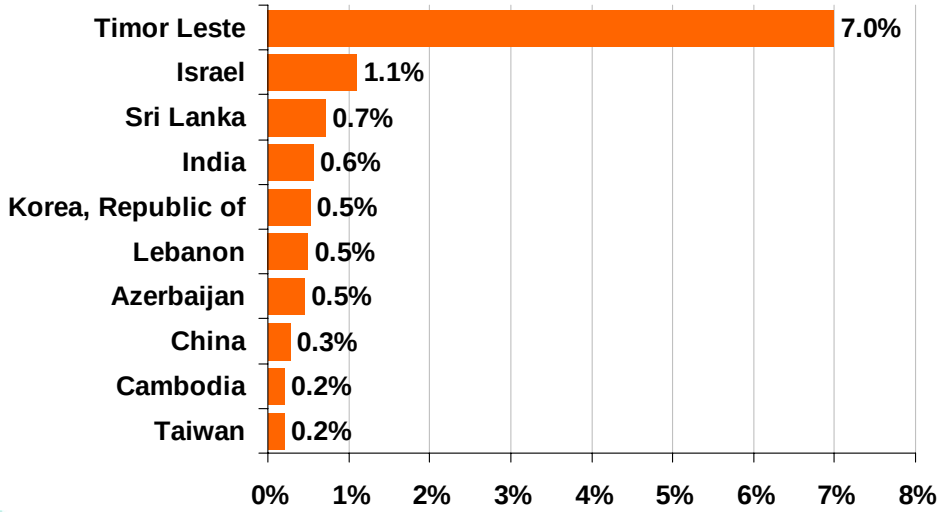
Source: FiBL 2009

Asia: Distribution of the countries‘ shares of organic land 2007



Source: FiBL 2009

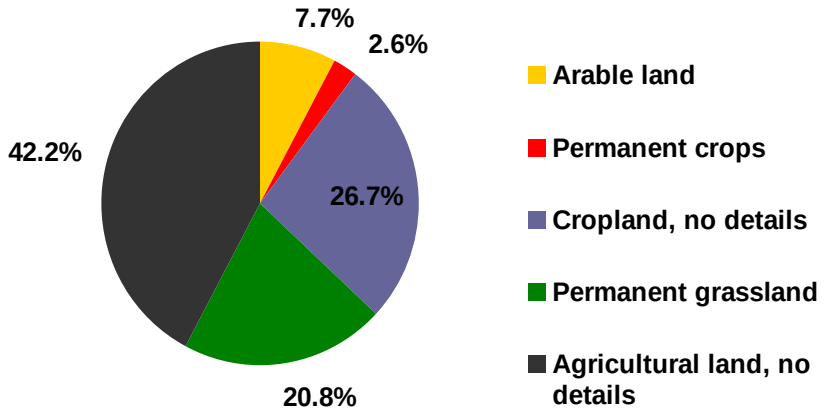
Asia: The ten countries/territories with the highest shares of organic agricultural land 2007



FiBL

Source: FiBL 2009

Asia: Use of organic agricultural land 2007 (2.9 million hectares)



FiBL

Source: FiBL Survey 2009

Organic wild collection areas play a major role in India and China. Production of final processed products is growing, although a majority of production is still fresh produce and field crops with low value-added processing, such as dry or processed raw ingredients.

Aquaculture (shrimp and fish) on the other hand, is emerging in China, Indonesia, Vietnam, Thailand, Malaysia and Myanmar.

Textiles represent another important trend.

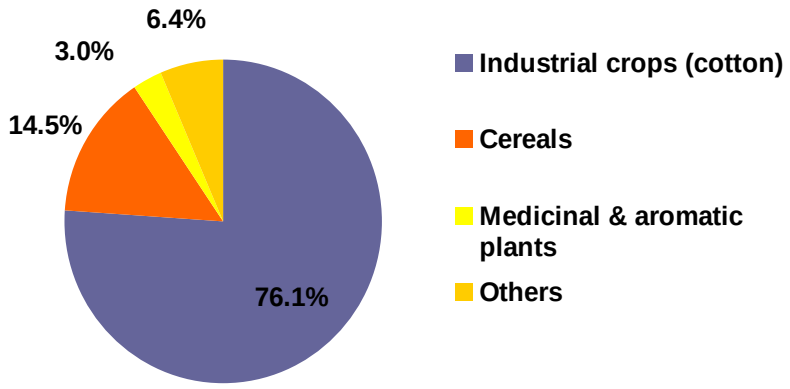
Some land use details are known for two-thirds of the organically managed land in Asia.

Arable land is mainly used for cereals, including rice.

Furthermore, cotton is important: India and Syria are two of the world‘s leading organic cotton producers.

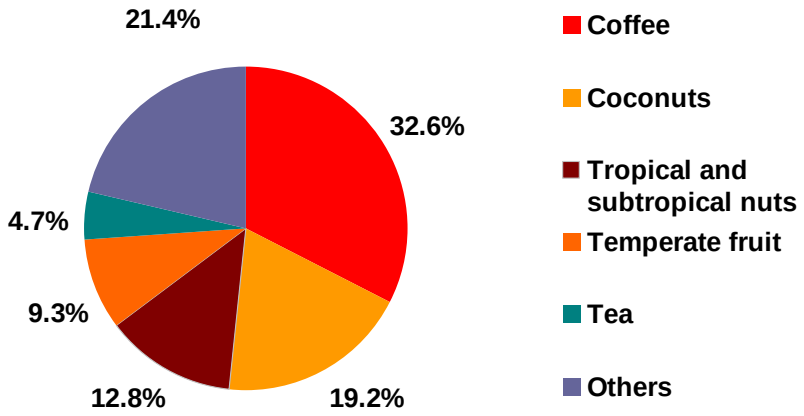
Detailed data: Table 34: Asia: Land use and main crop categories 2007, page 145, ‘The World of Organic Agriculture’ (see also www.organic-world.net).

Asia: Use of organic arable land 2007 (82,000 hectares)



Source: FiBL Survey 2009

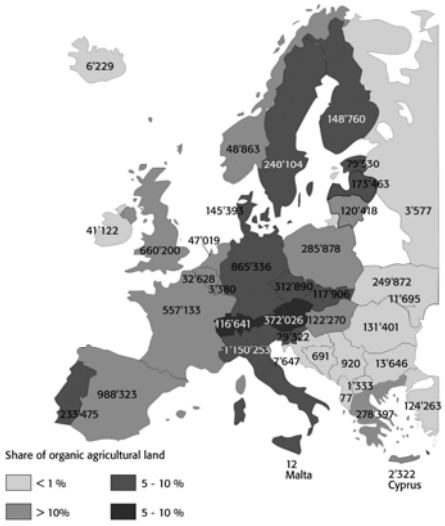
Asia: Use of organic permanent cropland (0.67 million hectares)



FiBL

Source: FiBL Survey 2009

Land under organic management in the countries of Europe 2007



Source: FiBL & ZMP Survey 2009

At the end of 2007, 7.7 million hectares in Europe were managed organically by more than 200,000 farms.

In the European Union, 7.2 million hectares were under organic management, with more than 180,000 organic farms.

1.9 percent of the European agricultural area and 4 percent of the agricultural area in the European Union is organic.

Twenty-four percent of the world's organic land is in Europe.

Further reading

The World of Organic Agriculture 2009. IFOAM/FiBL/ITC, Bonn, Frick, Geneva

•Helga Willer: Europe: Overview, page 148

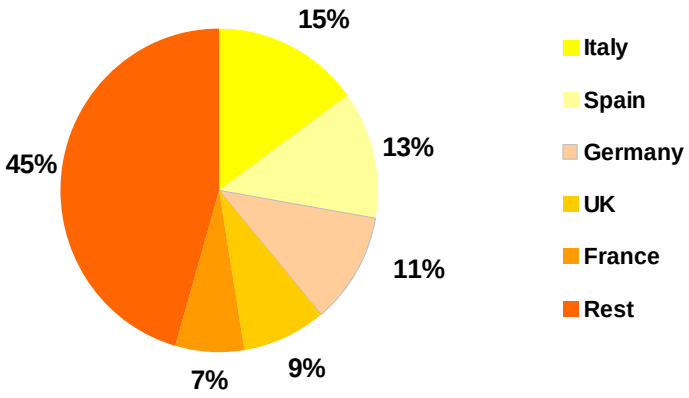
•Diana Schaack: Five Percent More Organic Land in the EU-27 - All Crops on the Increase, page 152

•Susanne Padel, Diana Schaack and Helga Willer: Development of the Organic Market in Europe, page 155

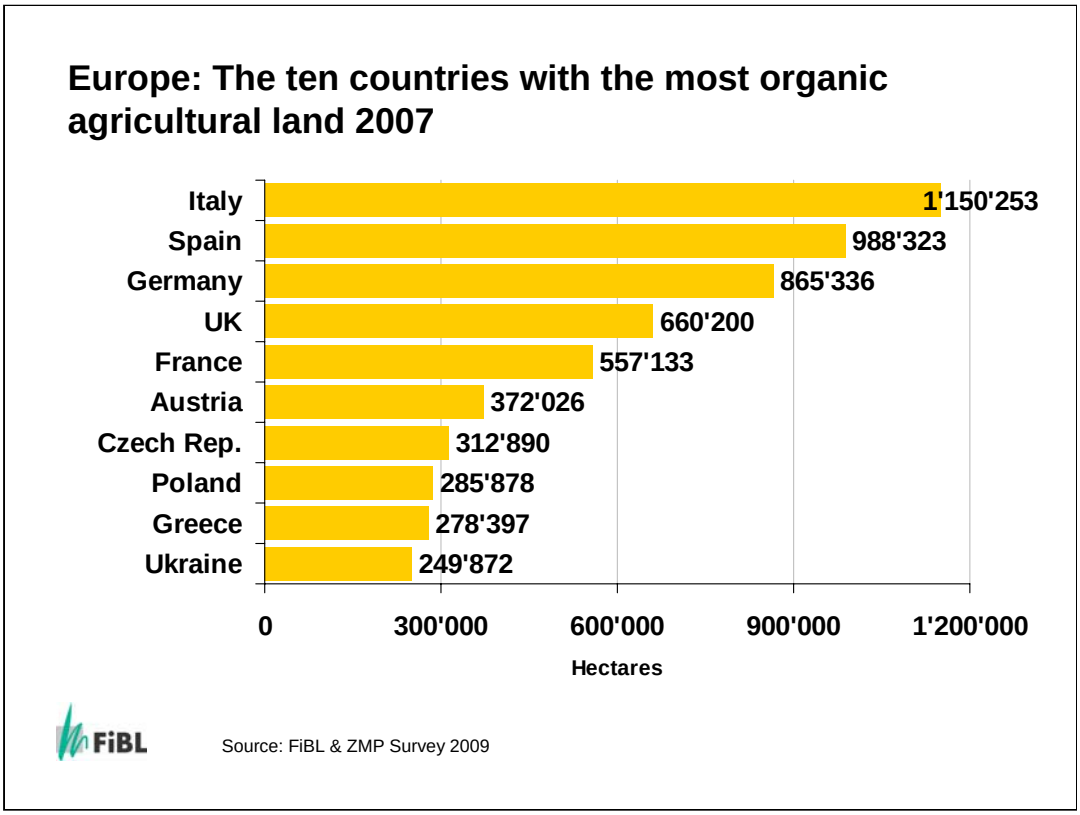
•Burkhard Schaer: The Organic Market in Europe: Trends and Challenges, page 164

•Victor Gonzalvez: Organic Action Plans in Europe, page 168

Europe: Distribution of organically managed agricultural land by country 2007 (7.7 million hectares)

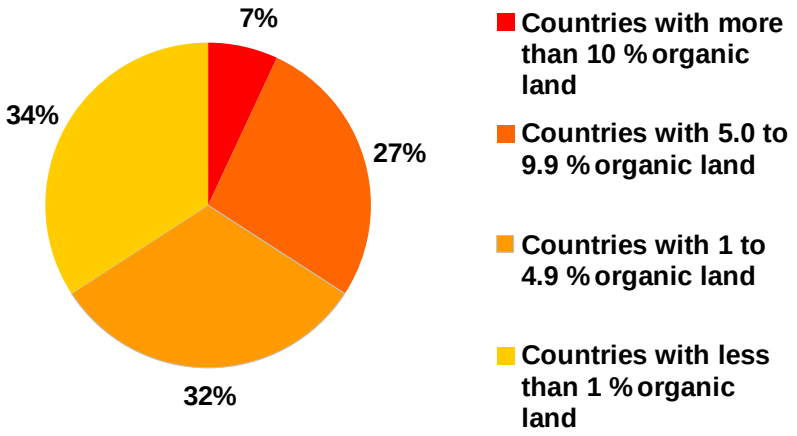


Source: FiBL & ZMP Survey 2009



In 2007, the countries with the largest organic area are Italy (1,150,253 hectares), Spain (988,323 hectares) and Germany (865,336 hectares) (2007).

Europe: Shares of organic land 2007

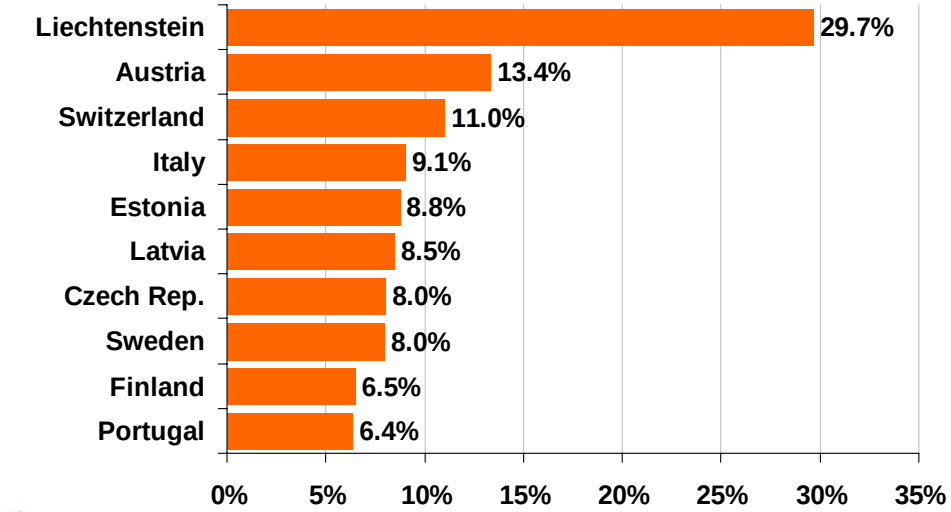


FiBL

Source: FiBL & ZMP Survey 2009

Europe is the region with the largest number of countries in which more than one percent of agricultural land is organic.

Europe: The ten countries with the highest shares of organic agricultural land 2007

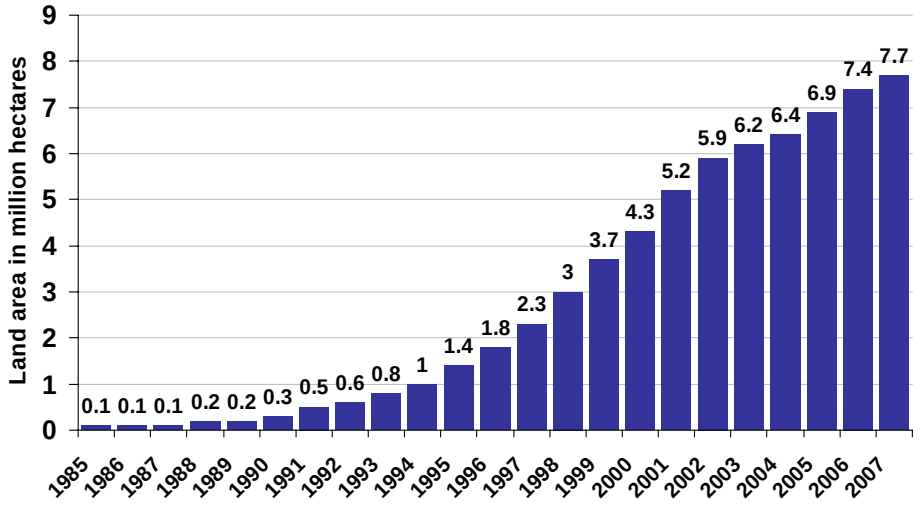


FiBL

Source: FiBL & ZMP Survey 2009

The highest percentages are in Liechtenstein (29 percent), Austria (13.4 percent) and Switzerland (11 percent).

Development of the organic agricultural land in Europe 1985-2007

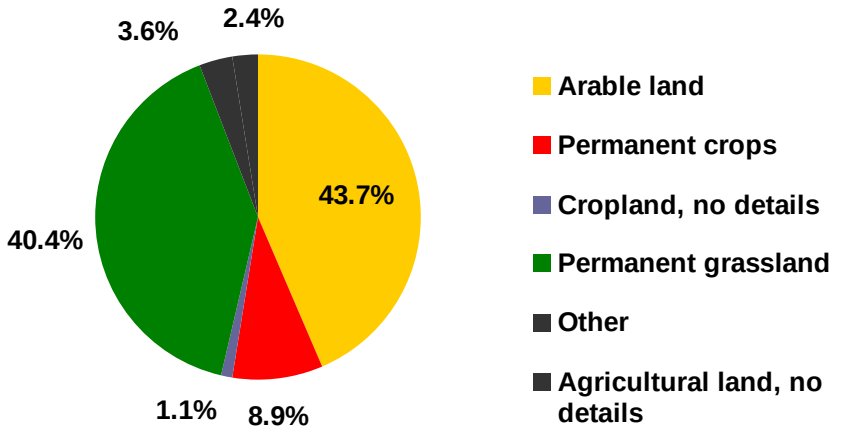


FiBL

Source: FiBL, Aberystwyth University, ZMP

Compared to 2006, organic land in Europe increased by more than 0.3 million hectares.

Europe: Use of organic agricultural land 2007 (7.7 million hectares)

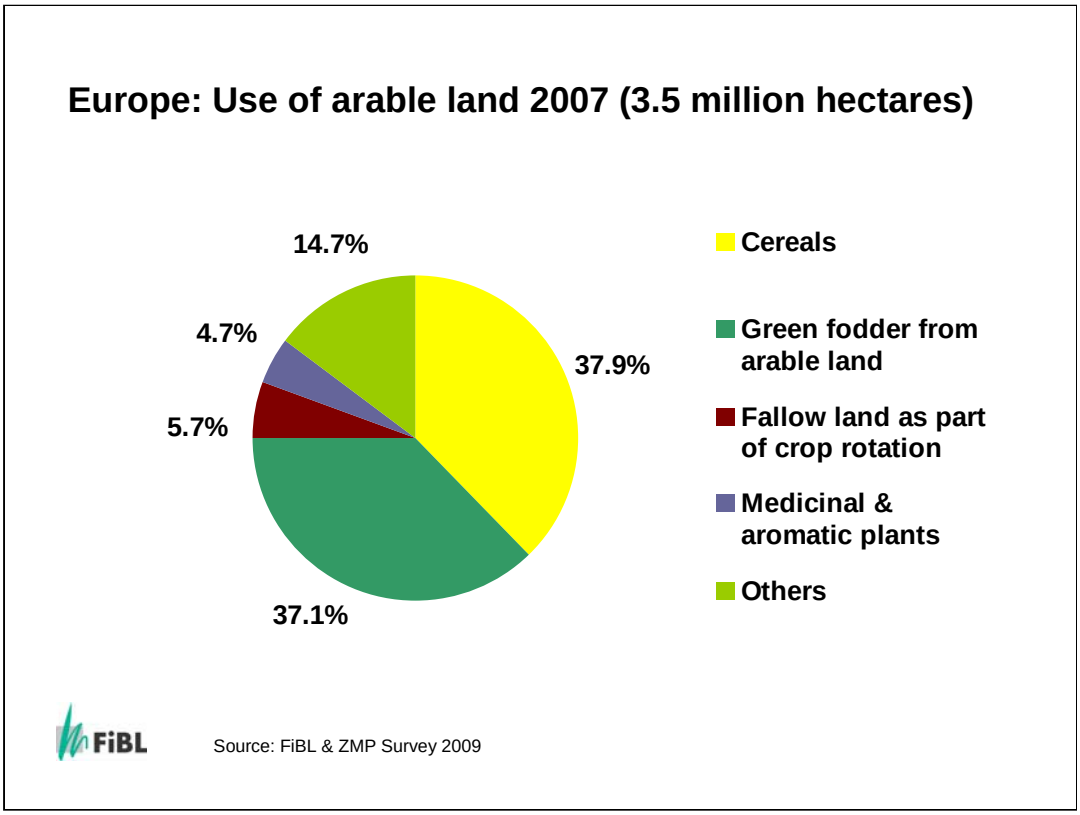


FiBL

Source: FiBL & ZMP Survey 2009

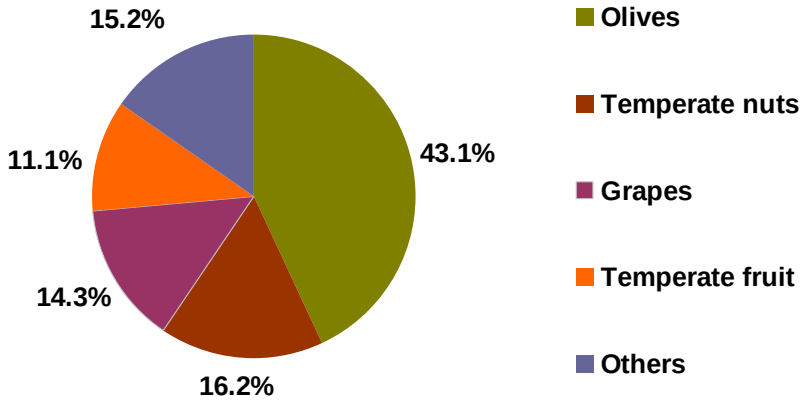
In Europe, the organically managed land uses are relatively well known, and the main crop categories are well documented.

Permanent pastures (3.2 million hectares) and arable land (3.5 million hectares) have approximately equal shares of the organic agricultural area.



The arable land is mainly used for cereals (1.3 million hectares), followed by the cultivation of field fodder (1 million hectares).

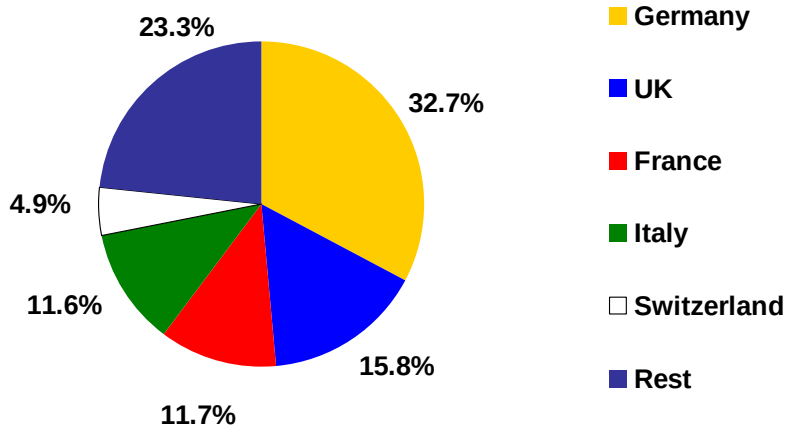
Europe: Use of permanent cropland 2007 (0.7 million hectares)



Source: FiBL & ZMP Survey 2009

Permanent crops (0.7 million hectares) account for nine percent of organic agricultural land. More than half of this land is used for olives, followed by nuts, fruits and grapes.

Europe: Distribution of sales of organic food and drink by country 2007 (total: 16.2 billion Euros)

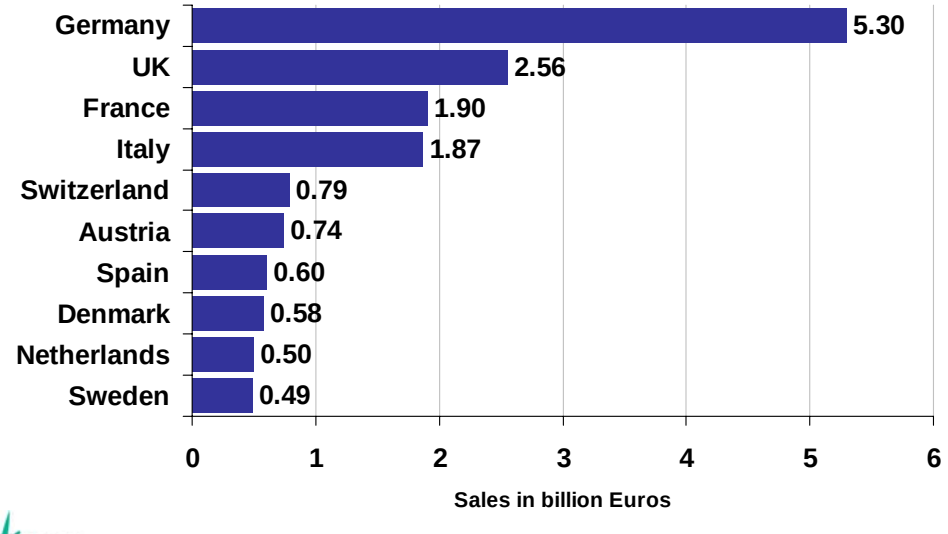


FiBL

Source: Aberystwyth University, FiBL & ZMP 2009

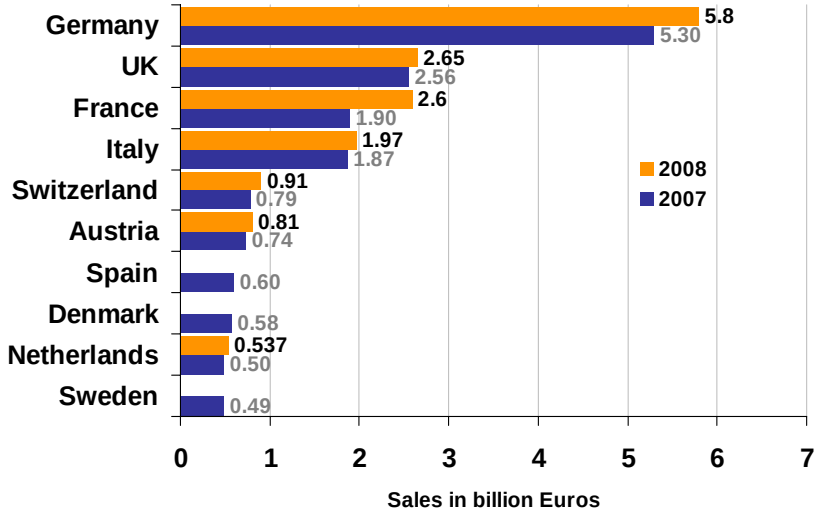
Sales of organic products were approximately 16 billion Euros in 2007. The largest market for organic products in 2007 was Germany with a turnover of 5.3 billion Euros (2008: 5.8 billion Euros), followed by the UK (2.6 billion Euros), France and Italy (both 1.9 billion Euros).

The European market for organic food and drink: The countries with the highest sales 2007



Source: Aberystwyth University, FiBL & ZMP 2009

The European market for organic food and drink: The countries with the highest sales 2007 and 2008 (survey date June 2009)

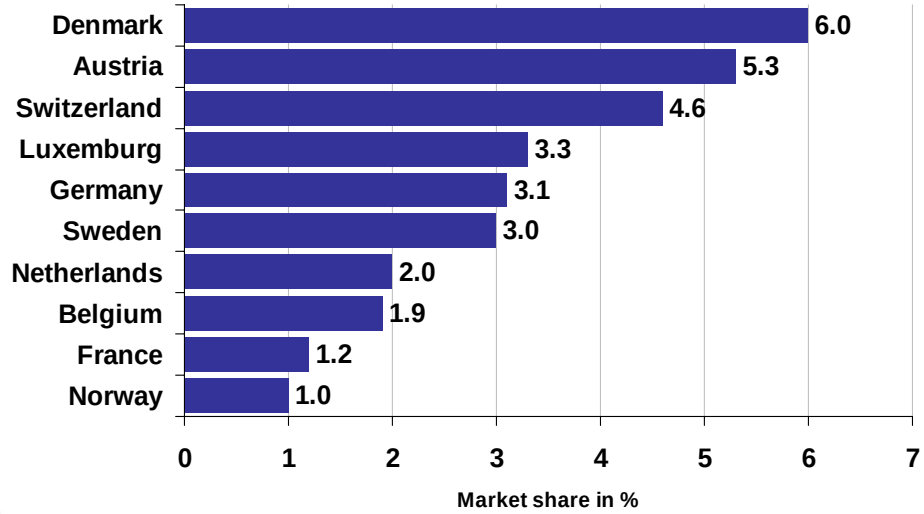


FiBL

Source: Aberystwyth University, FiBL & ZMP Survey 2009

As a portion of the total market share, the highest levels have been reached in Austria, Denmark and Switzerland, with around five percent.

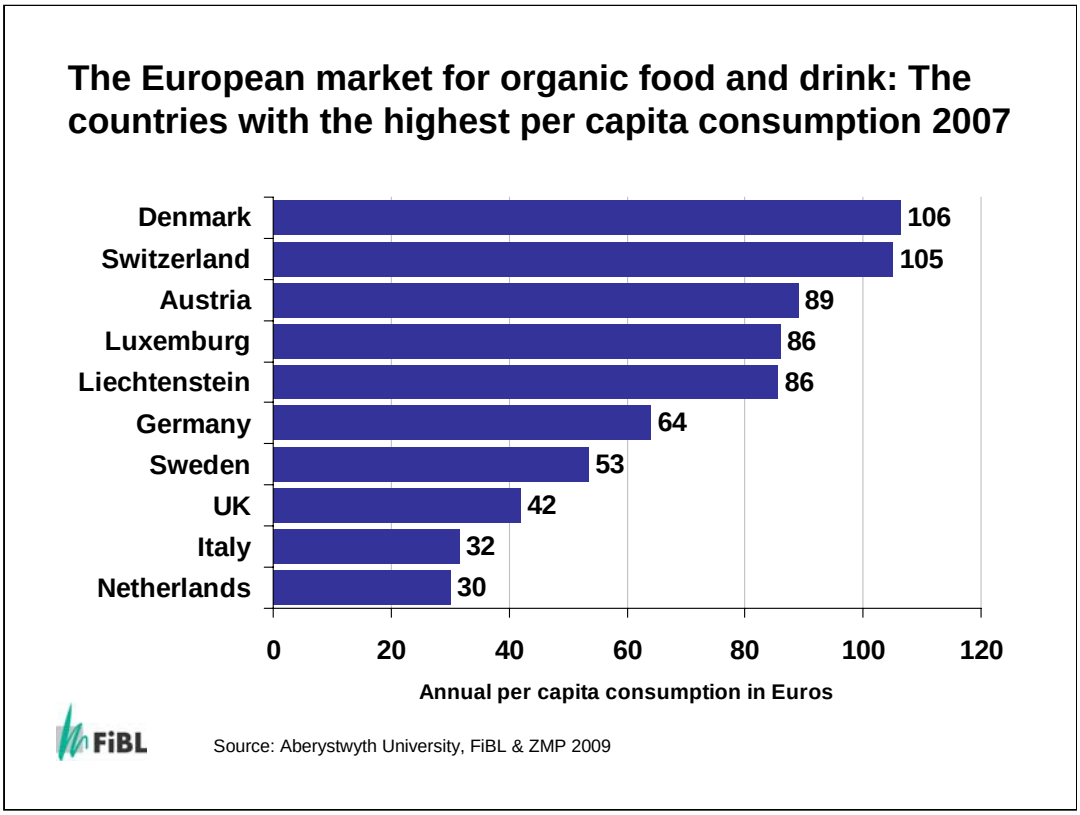
The European organic market for organic food and drink: The countries with the highest shares of organic food sales 2007



FiBL

Source: Aberystwyth University, FiBL & ZMP 2009

As a portion of the total market share, the highest levels have been reached in Austria, Denmark and Switzerland, with around five percent.



The highest per capita spending is also in these countries.

Latin America/Caribbean: Land under organic management (ha) 2007

Source: FiBL Survey 2009

In Latin America, 220,000 producers managed 6.4 million hectares of agricultural land organically in 2007. This constitutes 20 percent of the world's organic land. The leading countries are Argentina (2,777,959 hectares), Brazil (1,765,793 hectares) and Uruguay(930,965 hectares).

The highest shares of organic agricultural land are in the Dominican Republic and Uruguay with more than six percent and in Mexico and Argentina with more than two percent.

Most organic production in Latin America is for export. Important crops are tropical fruits, grains and cereals, coffee and cocoa, sugar and meats. Most organic food sales in the domestic markets of the countries concerned occurs in major cities, such as Buenos Aires and São Paulo.

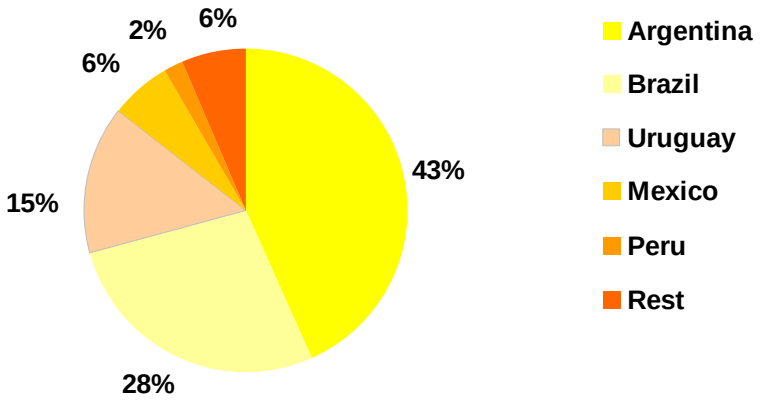
In recognition of the growing importance of the organic sector to Latin America's agricultural economy, governmental institutions have begun to take steps towards increasing involvement; governments are beginning to play a central role in the promotion of organic agriculture. The types of support in Latin American countries range from organic agriculture promotion programs to market access support by export agencies. In a few countries, limited financial support is being given to pay certification cost during the conversion period.

Further reading

The World of Organic Agriculture 2009. IFOAM/FiBL/ITC, Bonn, Frick, Geneva:

•*Organic Farming in Latin America and the Caribbean*
Salvador V. Garibay and Roberto Ugas

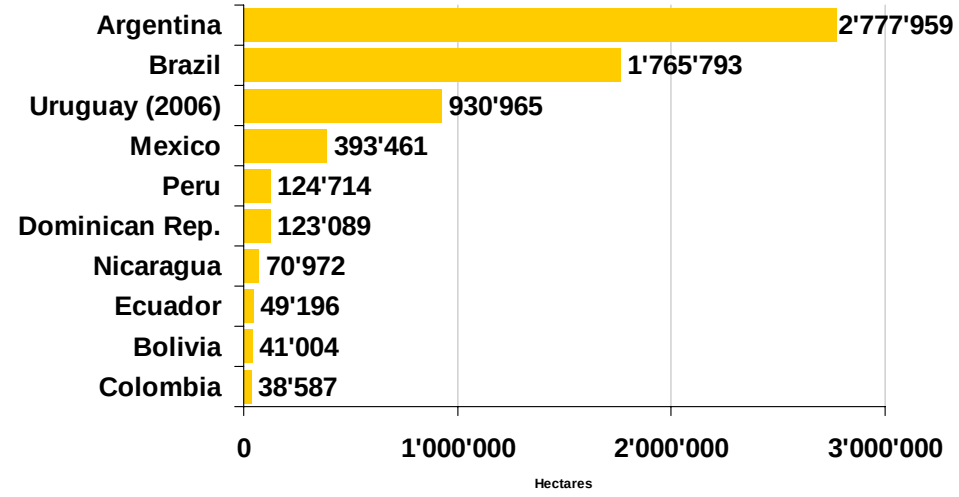
Latin America/Caribbean: Distribution of organically managed agricultural land by country 2007 (total: 6.4 million hectares)



FiBL

Source: FiBL Survey 2009

Latin America/Caribbean: The ten countries with the most organic agricultural land 2007

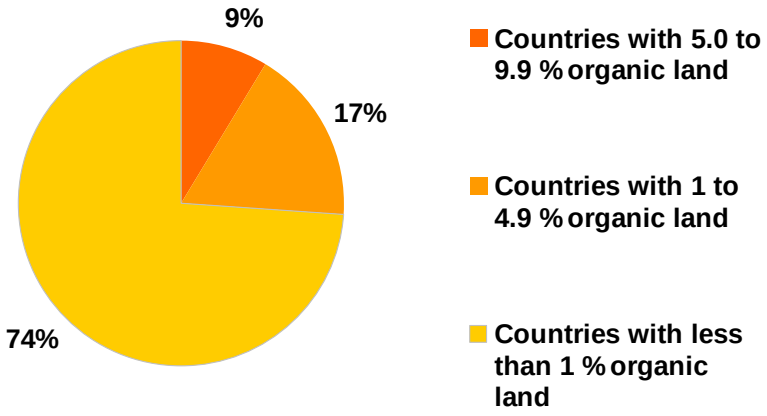


Argentina and Uruguay: Only fully converted area

Source: FiBL Survey 2009

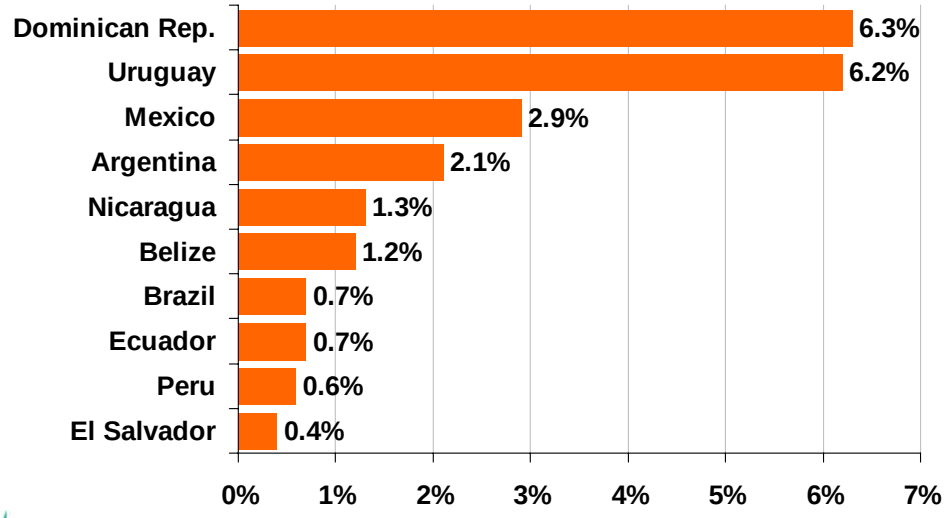
The leading countries are Argentina (2,777,959 hectares), Brazil (1,765,793 hectares) and Uruguay(930,965 hectares).

Latin America: Shares of organic land 2007



Source: FiBL Survey 2009

Latin America: The ten countries with the highest shares of organic agricultural land 2007

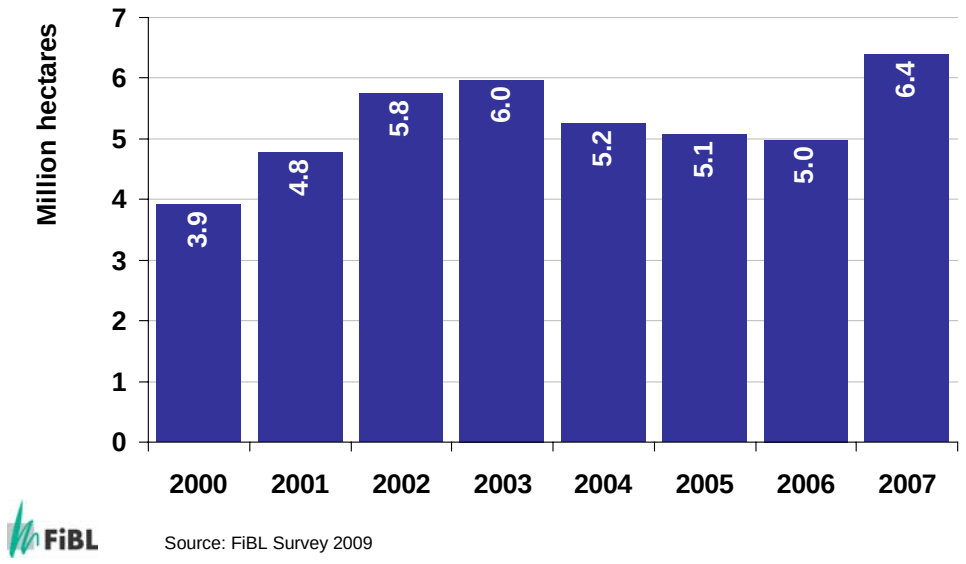


FiBL

Source: FiBL Survey 2009

The highest shares of organic agricultural land are in the Dominican Republic and Uruguay with more than six percent and in Mexico and Argentina with more than two percent.

Latin America: Development of organically managed agricultural land 2000-2007



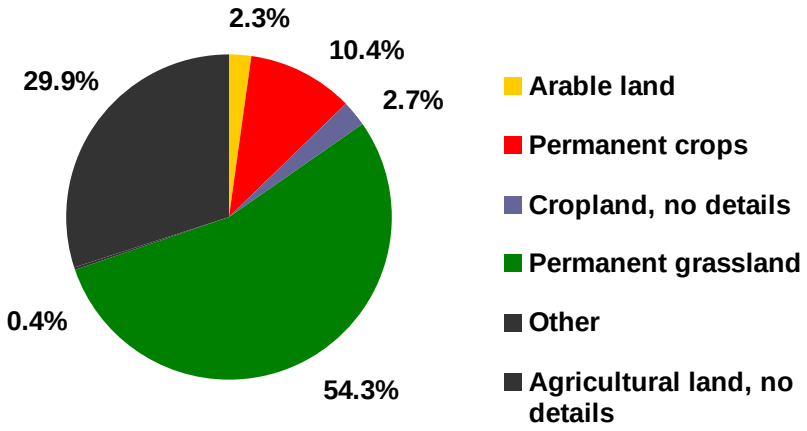
FiBL

Source: FiBL Survey 2009

The organic area increased by 1.4 million hectares during 2007 (partly due to the fact that for the first time the in-conversion area for Brazil was available).

The drop of organic land in 2004 is due to the economic crisis in Argentina, due to which the organic area in this country decreased.

Latin America/Caribbean: Use of organic agricultural land 2007 (6.4 million hectares)

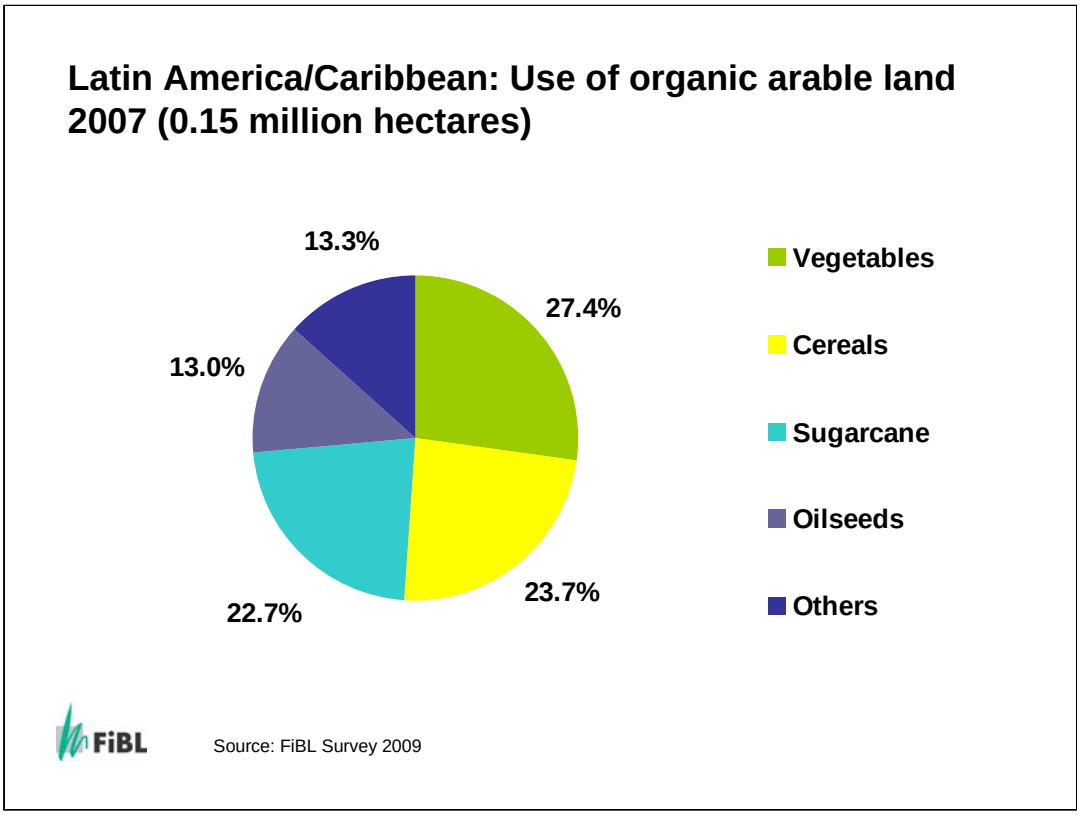


FiBL

Source: FiBL Survey 2009

For 70% of the organic agricultural land in Latin America (6.4 million hectares), land use data were available.

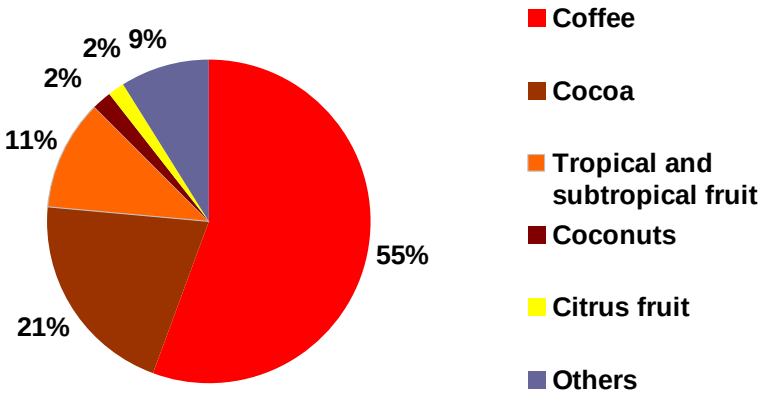
3.5 million hectares or more than half of the organic agricultural land are used for permanent pastures (mainly Argenrtina and Uruguay).



Arable land amounted to 0.15 million hectares in 2007.

One quarter each are used for vegetables, cereals and sugarcane.

Latin America/Caribbean: Use of organic permanent cropland 2007 (0.67 million hectares)



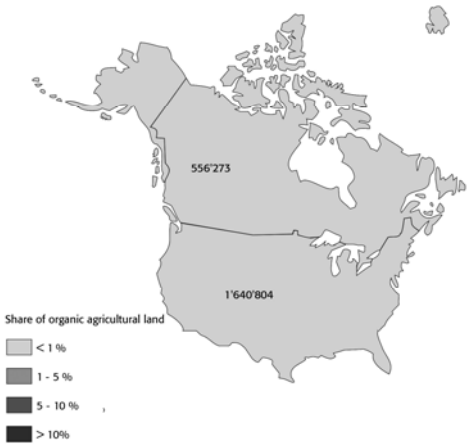
FiBL

Source: FiBL Survey 2009

With 0.7 million hectares, permanent crops account for about ten percent of the agricultural area.

About half of the permanent cropland is for coffee, followed by cocoa and tropical fruits.

North America: Land under organic management (ha) 2007



Source: FiBL Survey 2009

Seven percent of the world's organic agricultural land is in North America.

In North America, almost 2.2 million hectares are managed organically.

This represents approximately 0.6 percent of the total agricultural area.

There are 12,064 producers.

The major part of the organic land is in the US with 1.6 million hectares in 2005.

For the US the latest data available are from 2005. New data are expected to be published early summer 2009 by the United States Department of Agriculture USDA.

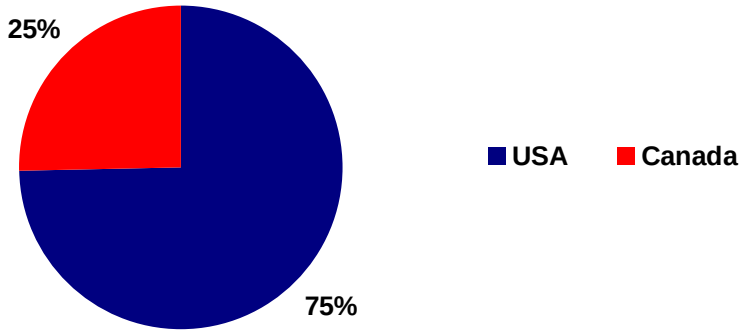
Further reading

The World of Organic Agriculture 2009. IFOAM/FiBL/ITC, Bonn, Frick, Geneva:

•*United States*
Barbara Haumann

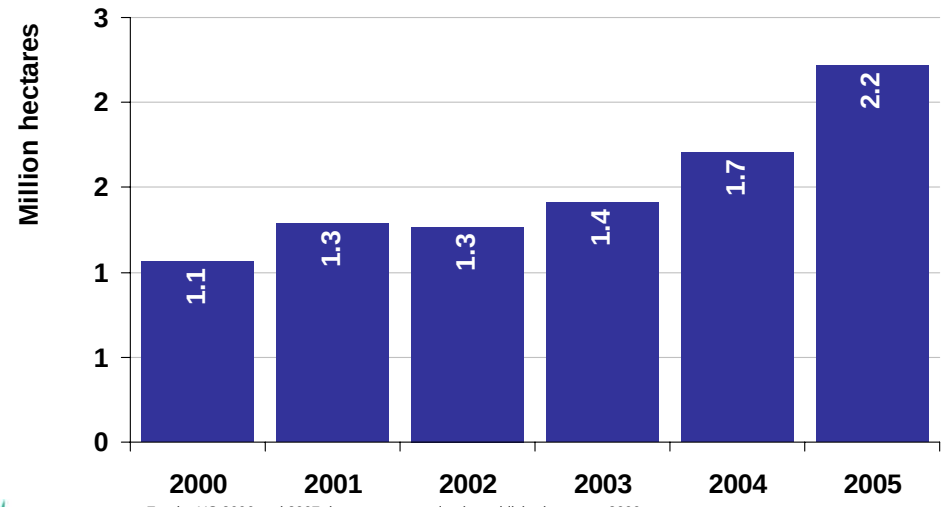
•*Canada*
Matthew Holmes and Anne Macey

North America: Distribution of organically managed agricultural land by country 2007; total: 2.2 million hectares



Source: USDA and Canadian Organic Growers 2000-2009

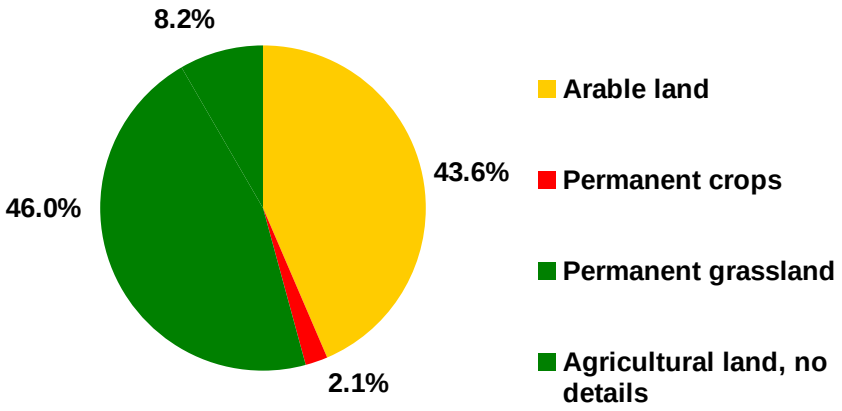
North America: Development of organically managed agricultural land 2000-2007



For the US 2006 and 2007 data are expected to be published summer 2009

Source: USDA and Canadian Organic Growers 2000-2009

North America: Use of organic agricultural land 2007 (2.2 million hectares)



Source: FiBL Survey 2009

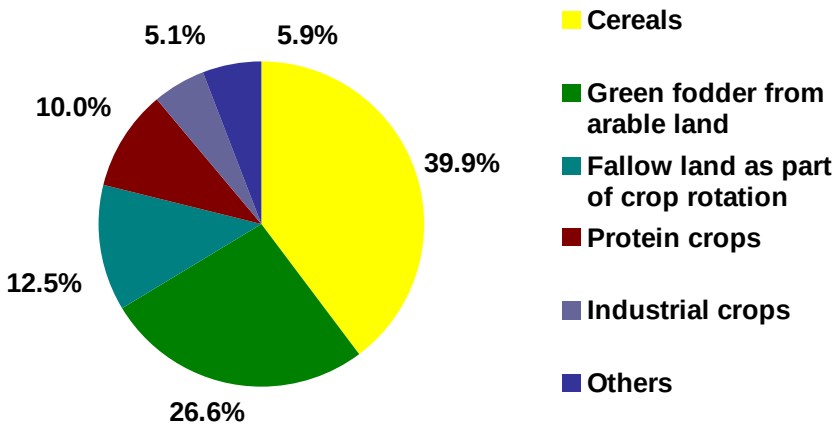
In North America (2.2 million hectares), crop information was available for most of the land.

As in Europe, arable land (0.96 million hectares) and permanent grassland (1 million hectares) have almost equal shares.

0.05 million hectares of permanent crops were grown.

A major part of the arable land is used for cereal production.

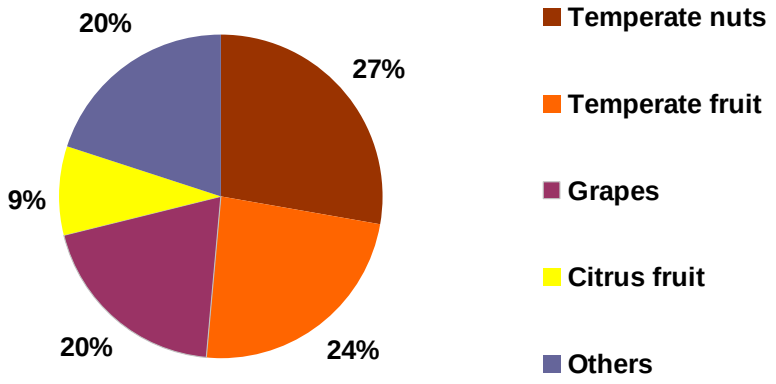
North America: Use of arable land 2007 (0.9 million hectares)



FiBL

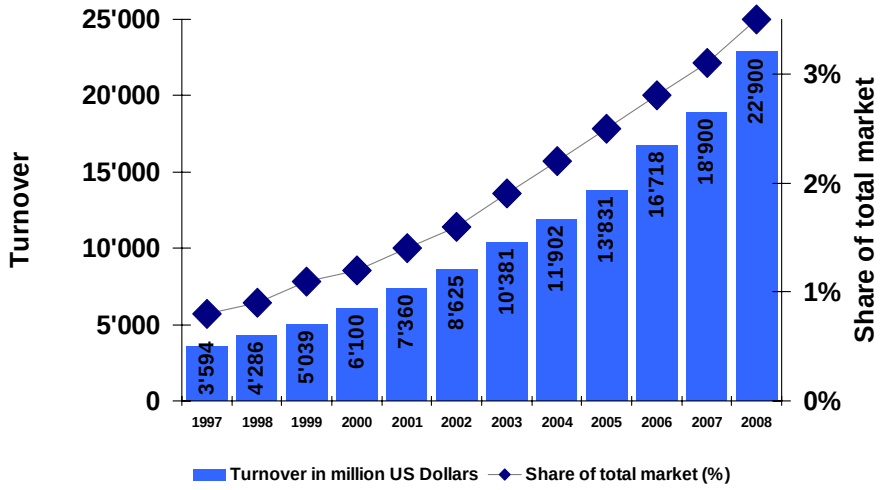
Source: FiBL Survey 2009

North America: Use of permanent cropland 2007 (0.05 million hectares)



Source: FiBL Survey 2009

US: Organic food sales 1997-2008



Source: OTA: Organic Industry Survey 2009 and previous surveys; data 2008 according to USDA.

Valued at more than 20 billion US dollars in 2007 (Organic Monitor), the North American market accounted for 45 percent of global revenues.

Growing consumer demand for healthy & nutritious foods and increasing distribution in conventional grocery channels are the major drivers of market growth.

The US organic industry grew 21 percent in sales in 2006, and was forecast to experience 18 percent sales growth each year on average from 2007 through 2010. Whether this rate will actually be realized is uncertain due to the economic downturn and reduction in consumer spending in the last quarter of 2008.

Likewise, a downturn is expected in Canada, even though the market growth in Canada, paired with the introduction of the new organic regulations, should provide a good outlook over the coming years.

However, during 2008 the organic market continued to grow: According to OTA (2009), the US market for organic food reached 22.9 billion US dollars.

Further reading

The World of Organic Agriculture 2009. IFOAM/FiBL/ITC, Bonn, Frick, Geneva

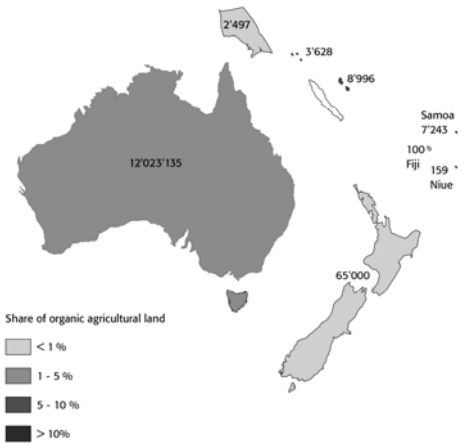
•*United States, Barbara Haumann*

•*Canada. Matthew Holmes and Anne Macey*

Organic-World.Net

•*North America – USA - Canada*

Oceania: Land under organic management (ha) 2007



Source: FiBL 2009

This region includes Australia, New Zealand, and island states such as Fiji, Papua New Guinea, Tonga and Vanuatu.

Altogether, there are 7,222 producers, managing almost 12.1 million hectares.

This constitutes 2.6 percent of the agricultural land in the area and 38 percent of the world's organic land.

Ninety-nine percent of the organically managed land in the region is in Australia (12 million hectares, 97 percent extensive grazing land), followed by New Zealand (65,000 hectares) and Vanuatu (8,996 hectares).

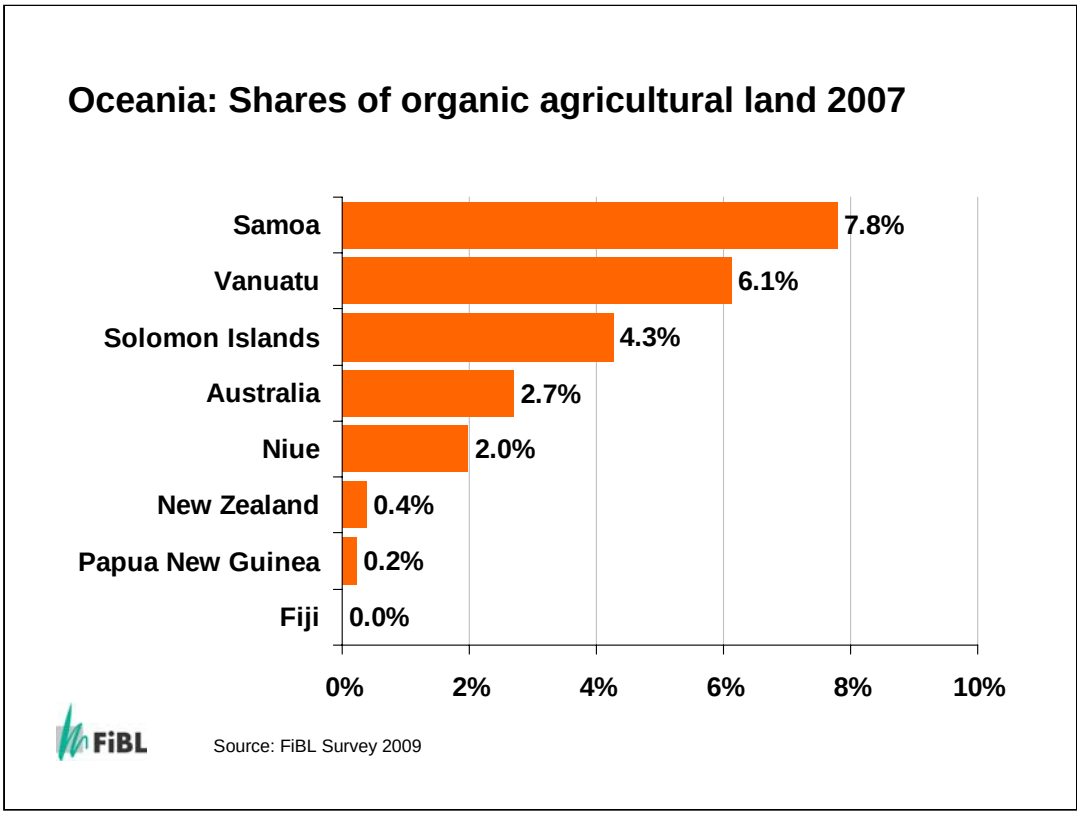
Further reading

The World of Organic Agriculture 2009. IFOAM/FiBL/ITC, Bonn, Frick, Geneva :

•*Organic Farming in Australia, Els Wynen*

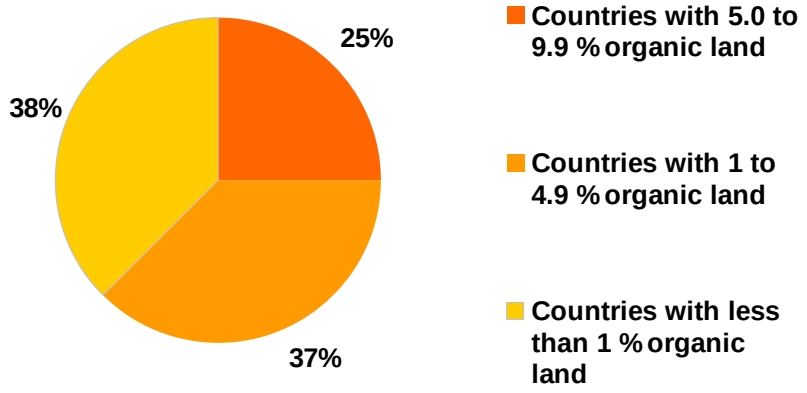
•*New Zealand, Seager Mason*

•*Organic Agriculture in the Pacific Region, Karen Mapusua*

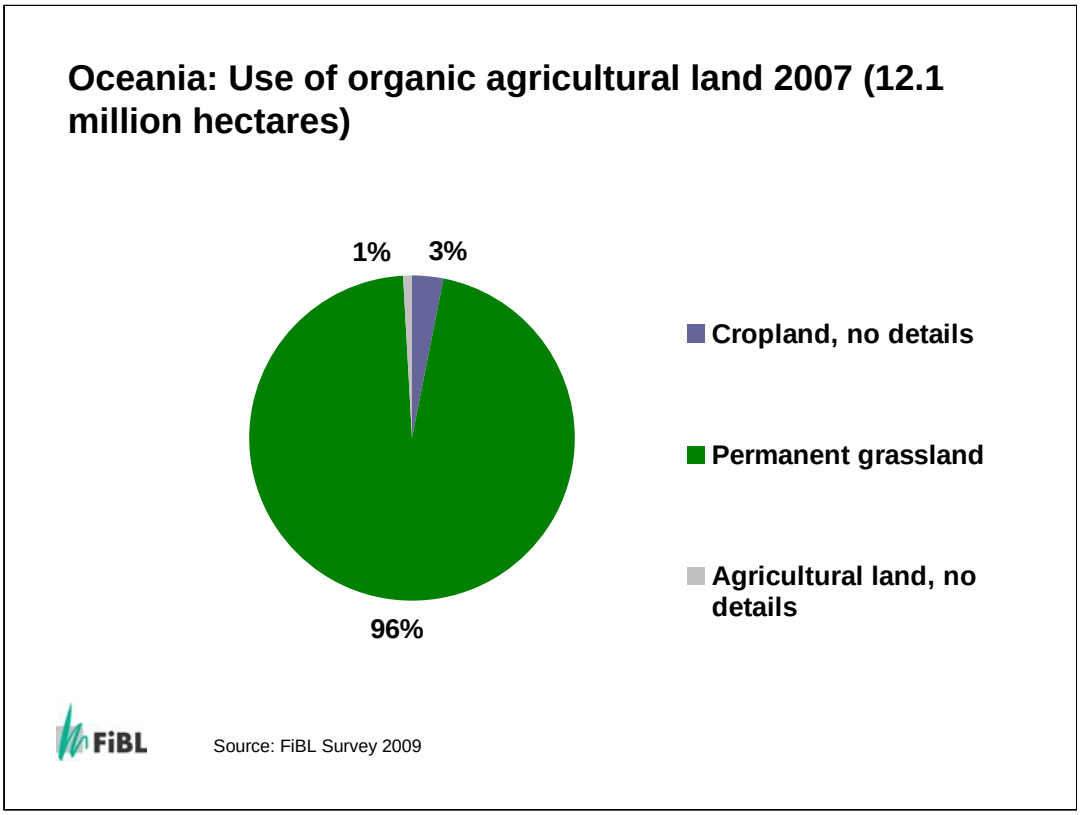


The highest shares of all agricultural land are in Samoa (7.8 percent), Vanuatu (6.1 percent), and the Solomon Islands (3.1 percent).

Oceania: Shares of organic land 2007



Source: FiBL Survey 2009



Oceania: Most of the land in Australia is used for extensive grazing areas, constituting 97 percent of the country's agricultural land.

Little or no information is available for the remaining land in the region.