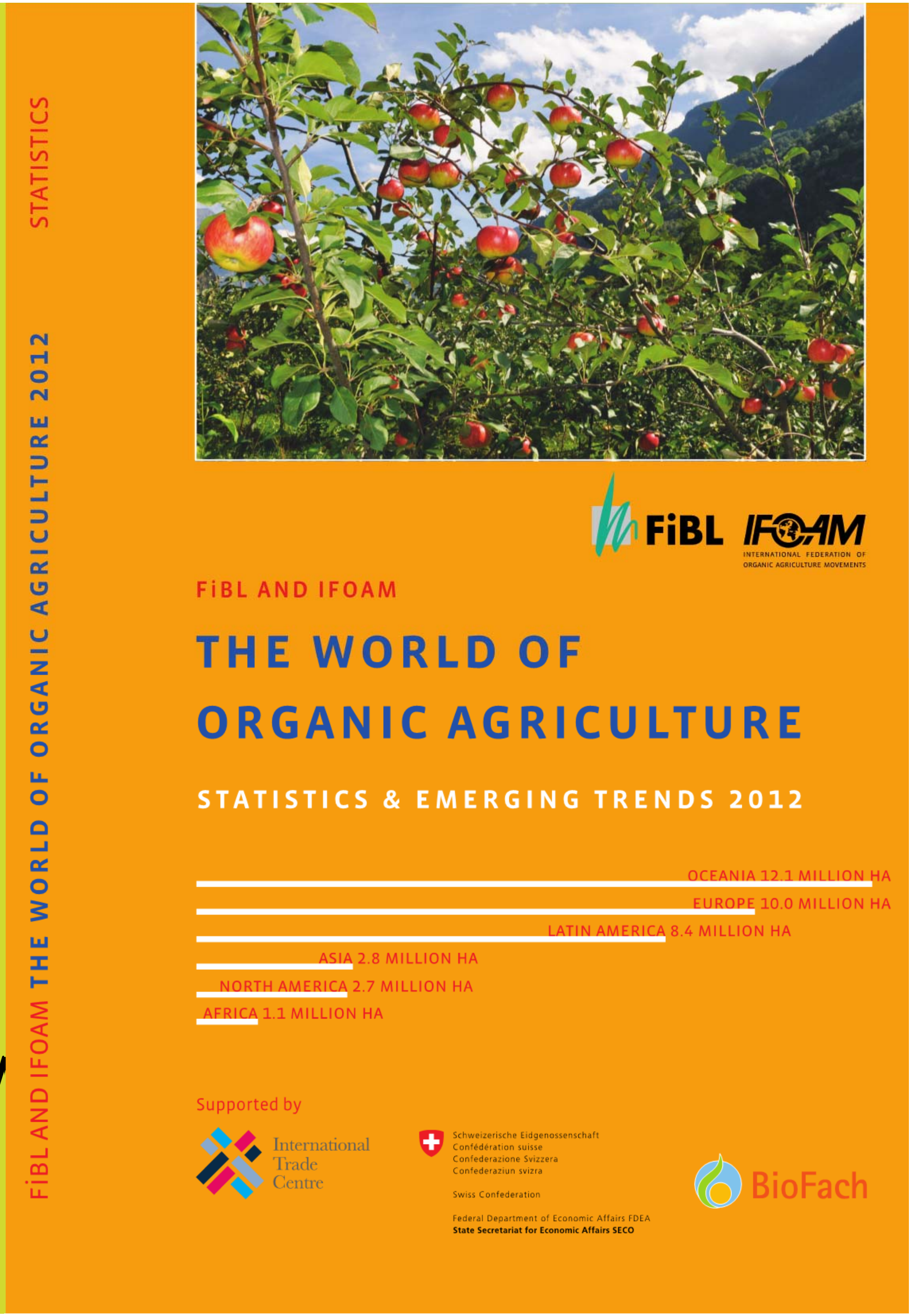
Welcome!

International Federation of Organic Agriculture Movements

Organic Market overview



Partner of BioFach

IFOAM

- **Issued by**

FiBL Forschungsinstitut für biologischen Landbau
Institut de recherche de l'agriculture biologique
Research Institute of Organic Agriculture
EXCELLENCE FOR SUSTAINABILITY

IFOAM

- **Supported by**

International Trade Centre

Schweizerische Eidgenossenschaft
Confédération suisse
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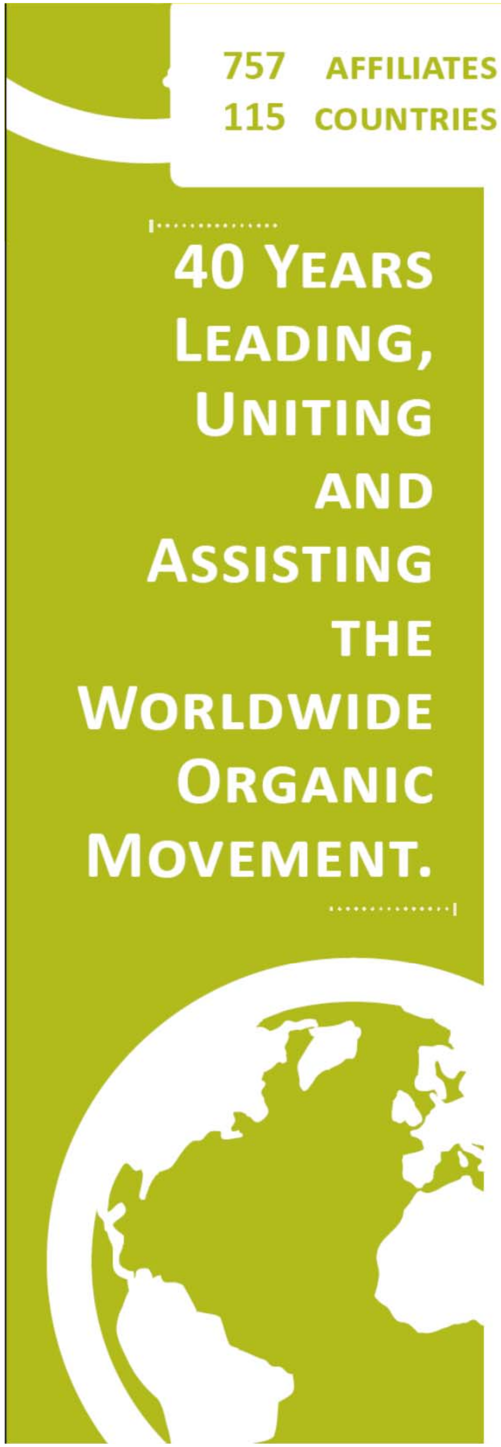
Swiss Confederation

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

geen grenzen aan mensen
Hivos

BioFach



BE PART OF THE GLOBAL ORGANIC MOVEMENT. APPLY TODAY.

IFOAM

International Federation of Organic Agriculture Movements

It unites, leads and assists the organic movement in its full diversity

1.6 mil certified farmers
70 million ha land
59 billion US$ consumer purchases

The Definition of Organic Agriculture

Organic Agriculture is a production system that sustains the health of soils, ecosystems and people. It relies on ecological processes, biodiversity and cycles adapted to local conditions, rather than the use of inputs with adverse effects. Organic Agriculture combines tradition, innovation and science to benefit the shared environment and promote fair relationships and a good quality of life for all involved.

The Principles of Organic Agriculture

Organic Agriculture is based on the principles of health, ecology, fairness and care.

Other terms used are: Bio, Biological, Eco, Ecological, Ecological Organic Farming, Agroecological Farming, Low Input Agriculture, Sustainable Agriculture, Natural Farming, Biodynamic Farming, Permaculture etc.

Some of these terms are legally protected, usually for a defined range of products, in some countries

IFOAM is not an umbrella for: Industrialized Agriculture, Green Revolution, Conventional Agriculture, Integrated Agriculture, IPM, Conservation Agriculture, GAP (Good Agriculture Practice), Rainforest Alliance, Slow Food, Fair Trade, 4C etc.

IFOAM is the international umbrella organization of organic agriculture movements worldwide

International Federation of Organic Agriculture Movements

Mission

IFOAM's mission is leading, uniting and assisting the organic movement in its full diversity.

Vision

Our goal is the worldwide adoption of ecologically, socially and economically sound systems that are based on the principles of Organic Agriculture.

UNITING THE ORGANIC WORLD

Organic!Agriculture!2012:!Key!Indicators!and!Leading!Countries!

Indicator!	World!	Leading!countries!!
Countries!with!data!on! certified!organic! agriculture!	2010:!160!countries!	!
Organic!agricultural!land!!	2010:!37!million!hectares!! (2009:!37.1!million!hectares;! 1999:!11!million!hectares)!	Australia!(12!mio.!hectares,!2009)! Argentina!(4.2!mio.!hectares)! US!(1.9!mio.!hectares,!2008)!
Share!of!total!agricultural! land!	2010:!0.9!%!! !	Falkland!Islands!(Malvinas)!(35.9!%)! Liechtenstein!(27.3!%)! Austria!(19.7!%)!
Growth!of!organic! agricultural!land!	2010:!]50'000!hectares!=!]0.1%!! (2009:!+1.9!mio.!hectares!=!+5%;! 2008:!+2.9!mio.!hectares!=!+9%)!	France:!+168'000!hectares!(+24!%)!! Poland:!+155'000!hectares!(+42!%)! Spain:!+126'000!hectares!(+9%)!
Further,!non;agricultural! organic!areas!(mainly!wild! collection)!	2010:!43!million!hectares!! (2009:!41!million!hectares;! 2008:!31.9!million!hectares)!!	Finland!(7.8!million!hectares),! Brazil!(6.2!million!hectares;!2007)! Cameroon!(6!million!hectares)!
Producers!!	1.6!million!producers!! (2009:!1.8!million!producers;! 2008:!1.4!million!producers)!	India!(400'551),!Uganda!(188'625),!Mexico! (128'826)!!
Organic!market!size!!	44.5!billion!euros!or!59.1!billion!US! dollars!! (2009:!54.1!billion!US!dollars! 1999:!15.2!billion!US!dollars)! Source:!Organic!Monitor!	US!(20.2!billion!euros!or!26.7!billion!USD),!! Germany!(6!billion!euros!or!8.4!billion!US!dollars),! France!(3.4!billion!euros!or!4.7!billion!US!dollars)!
Per!capita!consumption!	2010:!6.5!euros!or!8.6!US!dollars!	Switzerland!(153!euros,!213!USD)!! Denmark!(142!euros,!198!USD)! Luxemburg!127!euros!(177!USD)!
Number!of!countries!with! organic!regulations!2010!	84!countries!! (2009:!74!countries)!	!
Organic!certifiers!2010!	2011:!549!certifiers! (2010:!532;!2009!489)!	Japan,!USA,!South!Korea!

Source:!FiBL!and!IFOAM;!for!total!global!market:!Organic!Monitor;!for!number!of!certifiers:!
Organic!Standard/Grolink.

The Speakers

- **Laura Batcha**: **North America** markets**,** 10 minutes
- **Helga Willer**: **Europe,** 4 minutes
- **Diana** Schaack**: Germany**: 8 minutes
- **Susanne Padel: UK**: 8 minutes
- **Burkhard Schaer/Bernhard Jansen: Eastern Europe**: 8 minutes
- **Vitoon Panyakul: Asia**: 12 minutes

- **Amarjit Sahota, Reflections, Q&A**
- **Markus Arbenz, Moderation**

UNITING THE ORGANIC WORLD

- **Markus Arbenz** (IFOAM): 4 minutes
- A short introduction with the global figure to set the scene and link to the statistics book. Thanks to Organic Monitor/FiBL/IFOAM and sponsors. Introduce objectives and the speakers.

Speakers:

- **Laura Batcha**: North America markets***,*** 10 minutes
- The figures and developments in the US/Canada (also Mexico?) markets in 2010 and 2011. Which are the widely discussed issues and trends in the market and what are the concerns for consumers. E.g. the CSA (Community Supported Agriculture) or the (expected) impacts of equivalence agreements US, Canada, EU? What is going well and what is difficult in North America e.g. on product or marketing channels levels? A few thoughts on emerging markets Mexico would be nice, too.
  Remark: Coordinate with Matthew Holmes
- **Helga Willer**: Europe***,*** 4 minutes
- Overview of the figures and developments in European (not on country level) markets in 2010 and with a brief outlook to 2011.
- **Diana** Schaack**: Germany**: 8 minutes
- The figures and developments in the German market in 2010 and 2011. Which are the widely discussed issues and trends in the market and what are the concerns for consumers. E.g. the differentiation between organic/not organic or fair trade or the movement's labels for big retailers (Naturland/Rewe) ? What is going well and what is difficult in Germany e.g. on product or marketing channels levels?
- **Susanne Padel: UK**: 8 minutes
- The figures and developments in the UK/Irish market in 2010 and 2011. Which are the widely discussed issues and trends in the market and what are the concerns for consumers. E.g. the pricing ? What is going well and what is difficult in UK/Ireland e.g. on product or marketing channels levels? What are the reasons for continuous difficulties? Why is UK have a different development and what can the rest learn to avoid the recent developments.
- **Anais Riffiod: France**: 8 minutes
- The figures and developments in the French market in 2010 and 2011. Which are the widely discussed issues and

Program

1. Global organic farming statistics
2. The global market for organic food
3. Latest developments in the area of organic regulations
4. Q&A

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