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THE WORLD OF ORGANIC AGRICULTURE

STATISTICS & EMERGING TRENDS 2021

OCEANIA 35.9 MILLION HA

EUROPE 16.5 MILLION HA

LATIN AMERICA 8.3 MILLION HA

ASIA 5.9 MILLION HA

NORTH AMERICA 3.6 MILLION HA

AFRICA 2 MILLION HA

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Research Institute of Organic Agriculture FiBL

IFOAM – Organics International

The World of Organic Agriculture Statistics and Emerging Trends 2021

Edited by

Helga Willer, Jan Trávníček, Claudia Meier and Bernhard Schlatter

For the PDF version, corrigenda, supplementary material see http://www.organic-world.net/yearbook/yearbook-2021.html

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Any inquiries regarding this book and its contents should be sent to Helga Willer, FiBL, Ackerstrasse 113, 5070 Frick, Switzerland, e-mail helga.willer@fibl.org.

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Research Institute of Organic Agriculture FiBL, Ackerstrasse113, 5070 Frick, Switzerland,
Tel. +41 62 865 72 72, Fax +41 62 865 72 73, e-mail info.suisse@fibl.org, Internet www.fibl.org
IFOAM – Organics International, Charles-de-Gaulle-Str. 5, 53113 Bonn, Germany, Tel. +49 228 926 50-10, Fax +49 228 926 50-99, e-mail contact@ifoam.bio, Internet www.ifoam.bio, Trial Court Bonn, Association Register no. 8726

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Cover: Simone Bissig, FiBL, Frick, Switzerland
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Graphs (if not otherwise stated): Jan Trávníček, Bernhard Schlatter, Olivia Keller, FiBL, Frick, Switzerland
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Cover picture: Flight above organic farm, Velké Hostěrádky (VH), located in the South Moravia region, Czech Republic, May 2020.
Background: VH Agroton s.r.o. is a 367 ha organic arable farm located in the heart of Southern Moravia. Despite the scenic surroundings, the farm is prone to excessive erosion due to its hilly landscape. These challenges are being overcome and the knowledge gained is shared with others via demonstrations of suitable practices for profitable and sustainable organic production in arid and erosion threatened areas for the benefit of people and nature. It is a pleasure to inspire others on this challenging but rewarding journey.
Picture: Martin Matěj, Czech Republic.

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€/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
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 (from 2020 onward: EU-27)
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
MOAN: Mediterranean Organic Agriculture Network hosted by CIHEAM Bari, 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: Swiss Agency for Development and Cooperation
SECO: State Secretariat for Economic Affairs, Switzerland
SÖL: Stiftung Ökologie & Landbau – Foundation Ecology & Agriculture, Germany
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

In the dynamic field of organic agriculture, access to good quality data on organic farming helps to measure success toward achieving the Sustainable Development Goals (SDGs) and serves as a resource for further analysis and informed decision-making by researchers, policymakers, industry actors 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, which has proven to be particularly important over the past year.

COVID-19 is having a deep impact on all of us, highlighting the need to understand what is happening in the sector in order to mitigate the negative impacts of the crisis and reduce the vulnerability of supply chains. For the organic sector, it was a special year, as consumer demand for organic foods increased substantially during the pandemic. Evidence shows that retail sales have risen by up to 30 percent in some countries.

This report, which looks at the consolidated data from 2019, shows that once again, increasing demand for organic products stimulated growth in the organic sector with organic food sales heading towards the 110 billion euro mark. 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 grew in many countries, and the total organic area increased to more than 72 million hectares, representing 1.5 percent of agricultural land worldwide, managed by more than three 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
Head of the Division for Trade Promotion
Swiss State Secretariat for Economic Affairs (SECO)
Bern, Switzerland

Joseph Wozniak
Head, Trade for Sustainable Development Programme (T4SD)
International Trade Centre (ITC)
Geneva, Switzerland

Foreword from FiBL and IFOAM – Organics International

With the 22nd 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 more than 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 articles and reports on organic agriculture.

This publication also demonstrates the contribution of organic agriculture to overarching sustainability strategies like the Sustainable Development Goals, the EU Farm to Fork Strategy and the upcoming UN Food Systems Summit. Given that organic agriculture contributes substantially to all of the goals and strategies, 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 Nürnberg Messe 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 2021

Prof. Dr. Knut Schmidtke
Director
Research Institute of Organic Agriculture FiBL
Frick, Switzerland

Louise Luttikholt
Executive Director
IFOAM – Organics International
Bonn, Germany

Foreword from the Editors

In the 22nd 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 with a focus on organic food service, organic cotton, the European Union's organic import data as well as the statistics of Demeter International.

Like for the 2020 edition, we did not provide texts in the crop chapters, 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 10th time by the Organic and Beyond company.

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

Helga Willer, Jan Trávníček, Claudia Meier and Bernhard

Research Institute of Organic Agriculture FiBL, Frick, Switzerland

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Olugbenga O. AdeOluwa, Network of Organic Agriculture Research in Africa (NOARA), University of Ibadan, Nigeria, www.unaab.edu.ng; **Marcelle Agius**, Ministry for the Environment, Sustainable Development and Climate Change, Malta, **Moises Aisu**, Network of Organic Agriculture Research in Africa (NOARA), University of Ibadan, Nigeria, Ibadan, Nigeria, www.unaab.edu.ng; **Khurshid Alam**, Bangladesh Agricultural Research Institute (BARI), Bangladesh, **Saif Moh Al-Shara**, Ministry of Environment and Water, Agricultural Affairs and Animal Sector, Dubai, United Arab Emirates, www.moew.gov.ae; **David Amudavi**, Biovision Africa Trust, Nairobi, Kenya; **Sara Anselmi**, IFOAM - Organics International, Bonn, Germany, www.ifoam.bio; **Stoilko Apostolov**, Bioselena: Foundation for organic agriculture, Karlovo, Bulgaria, www.bioselena.com; **Lidya Ariesusanty**, Indonesia Organic Alliance IOA, Bogor, Indonesia, www.organicindonesia.org; **Angela Atallah**, CCPB Middle East, Beirut, Lebanon, www.ccpb.it; **Vugar Babayev**, Ganja Agribusiness Association (GABA), Ganja City, Azerbaijan, www.gaba.az; **Nouhoun Barro**, Ecocert SA West Africa Office, Ougadougou, Burkina Faso, www.ecocert.com; **Lisa Barsley**, Textile Exchange, London, United Kingdom; **Elif Bayraktar Öktem**, Ministry of Agriculture and Forestry of the Republic of Turkey, Ankara, Turkey, **Milena Belli**, Istituto per la Certificazione Etica ed Ambientale (ICEA), Bologna, Italy, www.icea.info; **Albrecht Benzing**, CERES - CERtification of Environmental Standards - GmbH, Happurg, Germany, **Olena Berezovska**, Organic Ukraine NGO of organic producers, Kyiv, Ukraine; **Florian Bernardi**, Klaus Büchel Anstalt, Mauren, Liechtenstein, www.kba.li; **Eva Berre**, Ecocert International, L'Isle Jourdain, France, www.ecocert.com; **Rommel Aníbal Betancourt Herrera**, Agencia de Regulación y Control Fito y Zoosanitario - AGROCALIDAD, Ministerio de Agricultura y Ganadería MAG, Quito, Ecuador, www.agrocalidad.gob.ec; **Sandeep Bhargava**, OneCert International Pvt. Ltd, Jaipur, Rajasthan, India, www.onecertasia.in; **Olivera Bicikliski,** Ministry of Agriculture, Forestry and Water Management, Skopje, North Macedonia; **Simone Bissig**, Research Institute of Organic Agriculture FiBL, Frick, Switzerland; **Barbara Böck**, NürnbergMesse, Nuremberg, Germany; **Thavisith Bounyasouk**, Department of Agriculture (DOA), Vientiane, Lao PDR; **Lorcan Bourke**, Bord Bia - Irish Food Board, Dublin 2, Ireland, www.agriculture.gov.ie; **Léna Brisset**, IFOAM Organics Europe, Brussels, Belgium, www.ifoam-eu.org; **Danila Brunner**, Nürnberg Messe; **Marie Reine Bteich**, CIHEAM Bari, Bari, Italy; **Klaus Büchel,** Klaus Büchel Anstalt, Mauren, Liechtenstein, www.kba.li; **Emanuele Busacca**, IFOAM Organics Europe, Brussels, Belgium, www.ifoam-eu.org; **Myroslava Bzhestovska**, Ministry for Development of Economy, Trade and Agriculture of Ukraine, Kyiv, Ukraine; **Liliana Calmațui**, Asociația Educație pentru Dezvoltare (AED), Chișinău, Republica Moldova; **Celia Carave**, Ecocert Group, Sevilla, Spain; **Geisel Carvalho de Menezes**, Ministry of Finance, Commerce and

Blue Economy, Sao Tomé and Príncipe**; Jennifer Chang**, IFOAM Asia, Seoul, Republic of Korea, www.kfsao.org; **Dong-Geun Choi**, Korean Federation of Sustainable Agriculture Organizations, Namyangju City, Gyeonggi Province, South Korea; **Thomas Cierpka,** IFOAM - Organics International, Bonn, Germany, www.ifoam.bio; **Genaro Coronel**, Servicio Nacional de Calidad y Sanidad Vegetal y de Semillas (SENAVE), Asunción, Paraguay, www.senave.gov.py; **Finn Cottle**, Soil Association, Bristol, United Kingdom; **Eduardo Cuoco**, Technology Platform Organics, Brussels, www.tporganics.eu; **Joy Daniel,** Institut for Integrated Rural Development (IIRD), Aurangabad, Maharashtra, India; **Nune Darbinyan**, ECOGLOBE - Organic control and certification body, Yerevan, Republic of Armenia, www.ecoglobe.am; **Wahyudi David**, Universitas Bakrie,; **Monique Decker**, Administration des services techniques de l'agriculture (ASTA), Luxembourg, www.asta.etat.lu; **Giorgia DeSantis**, Food and Agriculture Organization of the United Nations (FAO), Rome, Italy; **Lauren Dietemann,** Research Institute of Organic Agriculture FiBL, Frick, Switzerland; **Priyanga S. Dissanayake**, Sustainable Agriculture Research and Development Centre, Department of Agriculture; **Dóra Drexler**, Hungarian Research Institute of Organic Agriculture (ÖMKi), Budapest, Hungary, www.biokutatas.hu; **Gita Đurković**, Ministry of Agriculture Croatia, Croatia, www.dzs.hr; **Pilar M. Eguillor Recabarren**, Oficina de Estudios y Politicas Agrarias ODEPA, Santiago Centro, Chile, www.odepa.gob.cl; **Pauline Eid Saad**, Ministry of Agriculture, Lebanon; **Lucy Ellis**, Department of Agriculture, Stanley, Falkland Islands (Malvinas), www.agriculture.gov.fk; **Carlos Andres Escobar Fernandez**, ECONEXOS, Conexion Ecologica, Cali, Colombia, www.econexos.com; **Vic Anthony Joseph Fabre**, IFOAM Asia, Philippines; **Nawal Farkacha**, Ministry of Agriculture, Fisheries, Rural development and Forests, Rabat, Morocco; **Ditta Fekete**, Control Union Certifications B.V., Zwolle, The Netherlands, www.controlunion.com; **Li Feng**, IFOAM Asia China Office; **Sara Fischer**, Demeter-International e.V., Office Echterdingen, Echterdingen, Germany; **Tobias Fischer**, BCS Öko-Garantie GmbH, Nürnberg, Germany, www.bcs-oeko.de; **Barbara Fitch Haumann**, Organic Trade Association (OTA), Brattleboro, United States of America, www.ota.com; **Dorian Fléchet**, Agence Bio, Montreuil-sous-Bois, France, www.agencebio.fr; **Patricia Flores Escudero**, Latin American Office of IFOAM - Organics International, Lima, Peru; **Alexandra Forbord**, Norwegian Agriculture Agency Landbruksdirektoratet, Oslo, Norway, www.slf.dep.no; **Nicole Ford**, Australian Organic Ltd, Nundah, Australia; **Emmeline Foubert**, Certisys, Walhain, Belgium, www.certisys.eu; **Sergiy Galashevskyy**, Organic Standard, Kyiv, Ukraine; **Juan Manuel Gámez**, Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina, www.ciaorganico.net; **Osvaldo Garcia**, IMOcert Latinoamerica LTDA, Cochabamba, Bolivia, www.imocert.bio; **Maria Gernert**, IFOAM Organics Europe, Brussels, Belgium, www.ifoam-eu.org; **Maheswar Ghimire**, Kathmandu, Nepal; **Juan Gilardoni**, LETIS S.A., Santa Fe, Argentina; **Laurent C. Glin**, Benin; **Amish Gosai**, Textile Exchange, Bangalore, India; **R.P.N. Gunaratne**, Department of Agriculture, Sustainable Agriculture Research and Development Centre, Makandura, Sri Lanka; **Gunnar Gunnarsson**, Vottunarstofan Tún ehf., Reykjavik, Iceland, www.tun.is; **Owen Gwilliams**, Australian Organic Ltd, Nundah, Australia; **Zuhair Hasnain**, PMAS Arid Agriculture University, Rawalpindi, Pakistan; **Abid Ali Hasan**, Zakho Small Villages Projects ZSVP; Dohuk City, Dohuk, Iraq: **Jan Heusser**, Coop Fonds für Nachhaltigkeit, Basel, Switzerland; **Serhii Hlushchenko**, Ministry for Development of Economy, Trade and Agriculture of Ukraine, Kyiv, Ukraine; **Otto Hofer**, Bundesministerium für Nachhaltigkeit und Tourismus, Wien, Austria, www.bmlfuw.gv.at; **Lee Holdstock**, Soil Association, Bristol UK; **Tanveer Hossain Shaikh**, Asian Productivity Organization (APO), Tokyo, Japan, tanveerbrri.webs.com; **Andrea Hrabalová**, CTPOA, Brno, Czech Republic; **Beate Huber,** Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org; **Dang Huong**, Vietnam Organic Agriculture Association VOAA, Vietnam; **Xhona Hysa**, IFOAM - Organics International, Bonn, www.ifoam.org; **Barbara Jäggin**, Swiss State Secretariat for

Economic Affairs SECO, Bern, Switzerland; **Hakkyun Jeong**, Korea Institute of Rural Social Affairs, Chungnam Province, Republic of Korea, www.kfsao.org; **ManChul Jung**, Korea Institute of Rural Social Affairs, Chungnam Province, Republic of Korea, www.kfsao.org; **Joelle Katto-Andrighetto**, IFOAM - Organics International, Bonn, Germany, www.ifoam.bio; **Olivia Keller**, Research Institute of Organic Agriculture FiBL, Frick, Switzerland; **Laura Kemper**, Research Institute of Organic Agriculture FiBL, Frick, Switzerland; **Liudmyla Khomichak**, Ministry for Development of Economy, Trade and Agriculture of Ukraine, Kyiv, Ukraine; **Cornelia Kirchner**, IFOAM - Organics International, Bonn, Germany, www.ifoam.bio; **Natalie Kleine-Herzbruch**, FiBL Deutschland, Frankfurt; **Lyubomyr Klepbach**, Center for Environmental Solutions (CES), Minsk, Belarus; **Barbara Köcher-Schulz**, AMA-Marketing GesmbH AMA, Wien, Austria, www.ama-marketing.at; **Milana Kosanovic**, Ecocert Balkan, Belgrad, Serbia, www.ecocert.com; **Marja-Riitta Kottila**, Pro Luomu, Kauniainen, Finland, www.luomu.fi; **Daniël Kotzé**, Ecocert South Africa, Stellenbosch, South Africa, www.ecocertsouthafrica.com**; Eva Lacarce**, Agence Bio, Montreuil-sous-Bois, France, www.agencebio.fr; **Graciela Lacaze**, Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina, www.ciaorganico.net; **Nicolas Lampkin**, Organic Policy, Business and Research Consultancy; **Julia Lernoud**, IFOAM Board of Directors Argentina; **Francesca Lilliu**, IFOAM Organics Europe, Brussels, Belgium, www.ifoam-eu.org; **Aurora Josefina Lobato García**, 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; **Tia Loftsgard**, Canada Organic Trade Association, Ottawa, Canada, www.ota.com; **Pedro Lopez,** PROVOTEC, Madrid, Spain, www.provotec.es; **Marly Cristina López Rengifo**, Dirección General Agrícola (DGA - MINAGRI), Lima, Peru; **Anna Lubovedskaya**, Union Organic Farming, Moscow, Russian Federation, www.soz.bio; **Virginija Luksiene**, Ekoagros, Kaunas, Lithuania, www.ekoagros.lt; **Martin Lundø,** Statistics Denmark, Copenhagen, Denmark, www.dst.dk; **Louise Luttikholt,** IFOAM - Organics International, Bonn, Germany; **Samia Maamer Belkhiria**, Ministère de l'Agriculture, des Ressources Hydrauliques et de la Pêche, Tunis, Tunisia, www.tunisie.com; **Hossein Mahmoudi**, Environmental Sciences Research Institute, Evin Shahid Beheshti University SBU, Velenjak, Evin, Tehran, Iran; **Fernando Maldonado Cestona**, Dirección General de Sanidad Vegetal y Animal, El Salvador; **John Manhire**, The AgriBusiness Group, Lincoln, New Zealand, www.agribusinessgroup.com; **Karen Mapusu**a, Pacific Community, SPC, Suva, Fiji, www.spc.int; **Félix Oswaldo Maquera Cuayla**, Servicio Nacional de Sanidad Agraria (SENASA), Ministerio de Agricultura y Riego (MINAGRI), Lima, Peru; **Roberto Maresca**, Controllo e Certificazione Prodotti Biologic CCPB, Bologna; **Ayumi Matsuura**, Cambodian Organic Agriculture Association (COrAA), Phnom Penh, Cambodia, www.coraa.org; **Virgínia Mendes Cipriano Lira**, Ministério da Agricultura, Pecuária e Abastecimento (DTECSDAMAPA), Brasilia, Brazil; **Manoj Kumar Menon**; International Competence Centre for Organic Agriculture ICCOA, Rajarajeshwarinagar, Bangalore, India; **Dorota Metera**, BIOEKSPERT, Warszawa, Poland, www.bioekspert.waw.pl; **Merit Mikk**, Centre of Ecological Engineering - Ökoloogiliste Tehnoloogiate Keskus, Tartu, Estonia, www.ceet.ee; **Jelena Milic**, Ministry of Agriculture, Forestry and Water Economy, Belgrade, Republic of Serbia; **Eugene Milovanov**, Organic Federation of Ukraine, Kyiv, Ukraine, organic.com.ua; **Rodrigo Misiac**, Argencert, Buenos Aires, Argentina; **Satoko Miyoshi**, Global Organic Textile Standard (GOTS) Japan, Tokyo, Japan, www.oci2010.org; **Nadejda Mocanu**, Cultivating New Frontiers in Agriculture, Chisinau, Moldova, www.cnfa.org**; Bram Moeskops**, IFOAM Organics Europe, Brussels, Belgium, www.ifoam-eu.org; **Carolin Möller**, NASAA Certified Organic, Stirling, Australia; **Flávia Moura e Castro**, IFOAM - Organics International, Bonn, Germany, www.ifoam.org; **Arijana Mušić**, Organska Kontrola (OK), Sarajevo, Bosnia & Herzegovina; **Mohammed Mutarad Aloun**, Ministry of Climate Change and Environment of the United Arab Emirates, United Arab Emirates,

www.moccae.gov.ae; Alex Mutung, AfrONet, Dar es Salaam, Tanzania; Từ Thị Tuyết Nhung, Vietnam Organic Agriculture Association, Hanoi, Vietnam, www.vietnamorganic.vn; **Urs Niggli**, Agroecology.Science, Frick, Switzerland, www.agroecology.science; **Ramón Ernesto Noguera García**, Instituto de Protección y Sanidad Agropecuaria IPSA, Departamento de Inspección Certificación Fitosanitaria, Managua, Nicaragua; **Fatima Obaid Saeed**, Ministry of Environment and Water of the United Arab Emirates, United Arab Emirates; **Sharon Ong**, Ecocert South-East Asia, Singapore; **Susanne Padel**, Thünen Institute, Germany; A**mresh Pandey,** Ecocert; Aurangabad, Maharashtra, India; **Elena Panichi**, European Commission, Agriculture & Rural Development, Brussels, Belgium; **Vitoon Panyakul**, Green Net, Bangkok, Thailand, www.greennet.or.th; **Ejvind Pedersen**, Landbrug & Fødevarer, Copenhagen, Denmark, www.lf.dkOekologi.aspx; **Eliza Petrosyan-Sudzilovskaya**, ECOGLOBE - Organic control and certification body, Yerevan, Republic of Armenia, www.ecoglobe.am; **Diego Pinasco**, Servicio Nacional de Sanidad y Calidad Agroalimentaria SENASA, Buenos Aires, Argentina; **Roberto Pinton**, Pinton Organic Consulting, Padova, Italy; **Ritu Priya**, OneCert International Pvt. Ltd, Jaipur, Rajasthan, India, www.onecert.com; **Natalie Prokopchuk**, SECO-FiBL-SAFOSO Swiss-Ukrainian Program "Higher Value Added Trade from the Organic and Dairy Sector in Ukraine", Kyiv, Ukraine, www.qftp.org; **Andrijana Rakočević**, Ministry of Agriculture and Rural Development, Podgorica, Crna Gora, Montenegro; **Brayène Ramanantsoa**, Ecocert, Antananarivo, Madagascar; **Juan Carlos Ramirez**, Servicio Nacional de Sanidad y Calidad Agroalimentaria SENASA, Buenos Aires, Argentina, www.senasa.gov.ar; **Hans Ramseier**, Bio Suisse, Basel, Switzerland, www.bio-suisse.ch; **Pia Reindl**, AMA-Marketing GesmbH AMA, Wien, Austria, www.ama-marketing.at; **Michel Reynaud**, Ecocert International, Office, L'Isle Jourdain, France, www.ecocert.com; **Kurt Riedi**, Research Institute of Organic Agriculture FiBL, Frick, Switzerland; **Nathalie Rison Alabert**, Agence Bio, Montreuil-sous-Bois, France, www.agencebio.fr; **Christian Robin**, Swiss State Secretariat for Economic Affairs, Bern, Switzerland; **Fermín Vicente Romero Houlstan**, Dirección Nacional de Sanidad Vegetal; Ministerio de Desarrollo Agropecuario (MIDA), Panamá, República de Panamá, www.mida.gob.pa; **Monica Rubiolo**, Swiss State Secretariat for Economic Affairs, Bern, Switzerland; **Cecilia Ryegård**, Ekoweb, Sweden; **Olle Ryegård**, Ekoweb, Sweden; **Ayman Saad Al-Ghamdi**, Organic Agriculture Department, Saudi Arabia; **Amarjit Sahota**, Ecovia Intelligence, London, United Kingdom, www.ecoviaint.com; **Gregory Sampson**, International Trade Centre (ITC), Geneva, Switzerland; **Sisigué Arsène Sanou**, Ecocert Burkina Faso, Ougadougou, Burkina Faso; **Diana Schaack**, Agrarmarkt Informations-Gesellschaft mbH, Bonn, Germany, www.ami-informiert.de; **Aender Schanck**, OIKOPOLIS Groupe, Munsbach, Luxembourg, www.oikopolis.lu; **Silvia Schmidt**, IFOAM Organics Europe, Brussels, Belgium, www.ifoam-eu.org; **Knut Schmidtke**, Forschungsinstitut für biologischen Landbau FiBL, Frick, www.fibl.org; **Claudine Schmit**, Administration des services techniques de l'agriculture (ASTA), Luxembourg, www.asta.etat.lu; **Bernhard Schulz**, CERES - CERtification of Environmental Standards - GmbH, Happurg, Germany, www.ceres-cert.com; **Hana Šejnohová**, Institute of agricultural economics and information, Brno, Czech Republic, www.uzei.cz; **Andreas Selearis**, Department of Agriculture (MOA), Nicosia, Cyprus, www.moa.gov.cy; **Dheeraj Sharma**, OneCert International Pvt. Ltd, Jaipur, Rajasthan, India, www.onecertasia.in; **Elene Shatberashvili**, Elkana - Biological Farming Association, Akhaltsikhe, Georgia, www.elkana.org.ge; **Christoph Simpfendörfer**, Demeter-International e.V., Office Echterdingen, Echterdingen, Germany; **Harpreet Singh Sondh**, Control Union Certifications B.V., Zwolle, www.controlunion.com www.controlunion.com; **Anamarija Slabe**, Institut za trajnostni razvoj, Lubljana, Slovenia, www.itr.si**; Nicolette van der Smissen**, Consultant for Organic Production, Feres, Greece; **Manjo Smith**, Namibian Organic Association NOA, Okahandja, Namibia, www.noa.org.na; **Francesco Solfanelli**, Università Politecnica Marche, Ancona, Italy, www.univpm.it; **Michael Stadler**,

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CERES - CERtification of Environmental Standards - GmbH, Happurg, Germany, www.ceres-cert.com; **Marcela Stahil**, Ministry of Agriculture, Regional Development and Environment of Moldova, Department for Organic Production and Products of Origin, Chişinău, Moldova; **Franziska Staubli**, Bioinspecta, Frick, Switzerland, www.bio-inspecta.ch; **Evonne Tan**, Textile Exchange, Kuala Lumpur, Malaysia; **Ilse Timmermans**, Departement Landbouw en Visserij, Brussels, Belgium; **Thanh Trinh**, Vietnam Organic Agriculture Association VOOA, Hanoi, Vietnam; **Bence Trugly**, Hungarian Research Institute of Organic Agriculture (ÖMKi), Budapest, Hungary, www.biokutatas.hu**; Liesl Truscott**, Textile Exchange, Bath, United Kingdom; **Emma Tsessue**, Ecocert SAS, L'Isle Jourdain, France, www.ecocert.com; **Kesang Tshomo**, Ministry of Agriculture MOA, Thimphu, Bhutan, www.moa.gov.bt; **Daava Tungalag**, Ministry of Food Agriculture and Light industry of Mongolia, Ulaanbaatar, Mongolia; **Tal Weil Tzameret**, Ministry of Agriculture & Rural Development, Plant Protection & Inspection Services (PPIS), Israel; **Francesco Tubiello,** Food and Agriculture Organization of the United Nations (FAO), Rome, Italy; **Ray Tzeng**, Organic Center, National Ilan University (NIU), Yilan City, Taiwan; **Edgardo Uychiat**, Negros Island Sustainable Agriculture Research & Development, The Philippines; **Miriam van Bree**, Bionext, JC Ede, The Netherlands, bionext.nl; **Marijke van Schagen**, European Commission, Directorate-General for Agriculture and Rural Development, Bruxelles, Belgium; **Frederica Varini,** IFOAM - Organics International, Bonn, www.ifoam.org; **Jelena Vasiljevic**, Ministry of Agriculture Serbia, Belgrade, Serbia, www.minpolj.gov.rs; **Airi Vetemaa**, Estonian Organic Farming Foundation EOFF, Tartu, Estonia, www.lzuu.lt; **Rita Villarreal**, Dirección Nacional de Sanidad Vegetal; Ministerio de Desarrollo Agropecuario (MIDA), Panamá, República de Panamá, www.mida.gob.pa; **Venancia Wambua**, AfrONet, Dar es Salaam, Tanzania; *Joseph Wozniak*, International Trade Centre (ITC), Geneva, Switzerland; *P.I. Yapa*, Sabaragamuwa University of Sri Lanka; **David Yavruyan**, Eco Consulting Group; **Suet Yin Siew,** Textile Exchange, India; **Qiao Yuhui**, China Agricultural University, Beijing, China, www.cau.edu.cnzihuan; **Valentyna Zaiets**, Ministry for Development of Economy, Trade and Agriculture of Ukraine, Kyiv, Ukraine; **Raffaele Zanoli**, Università Politecnica delle Marche UNIVPM, Ancona, www.univpm.it**; José Zapata**, Oficina de Control Agricultura Organica, Direccion de Certificacion de Productos Agropecuarios (DICERT-RD), Santo Domingo, Republica Dominicana, www.agricultura.gob.do; **Diana Zeidan**, Canada Organic Trade Association, Ottawa, Canada, www.ota.com; **Lisha Zheng**, Ecocert China, Beijing, China; Zhejiang Zhou, IFOAM Asia, China, www.ifoam.org; **Darko Znaor**, Independent Consultant, Zagreb, Croatia; **Silvia Zucconi**, Nomisma - Economic Research Institute, Bologna, Italy

Organic Agriculture: Key Indicators and Top Countries

Indicator	World	Top countries
Countries with organic activities[1]	2019: 187 countries	
Organic agricultural land	2019: 72.3 million hectares (1999: 11 million hectares)	Australia (35.7 million hectares) Argentina (3.7 million hectares) Spain (2.4 million hectares)
Organic share of total agricultural land	2019: 1.5 %	Liechtenstein (41.0 %) Austria (26.1 %) São Tomé and Príncipe (24.9 %)
Wild collection and further non-agricultural areas	2019: 35.1 million hectares (1999: 4.1 million hectares)	Finland (4.6 million hectares) Zambia (3.2 million hectares) Namibia (2.6 million hectares)
Producers	2019: 3.1 million producers (1999: 200'000 producers)	India (1'366'226) Uganda (210'353) Ethiopia (203'602)
Organic market[2]	2019: 106.4 billion euros (2000: 15.1 billion euros)	US (44.7 billion euros) Germany (12.0 billion euros) France (11.3 billion euros)
Per capita consumption	2019: 14.0 euros	Denmark (344 euros) Switzerland (338 euros) Luxembourg (265 euros)
Number of countries with organic regulations	2019: 108 countries	
Number of affiliates of IFOAM – Organics International	2020: 719 affiliates	Germany: 79 affiliates India: 52 affiliates USA: 48 affiliates Italy: 46 affiliates

Source: FiBL survey 2021, based on national data sources, data from certifiers and IFOAM – Organics International

[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 112 billion US dollars in 2019. One euro corresponded to 1.1195 US dollars in 2019 according to the European Central Bank.

The World of Organic Agriculture 2021: Summary

HELGA WILLER,[1] CLAUDIA MEIER,[2] BERNHARD SCHLATTER,[3] LAUREN DIETEMANN,[4] LAURA KEMPER[5] AND JAN TRÁVNÍČEK[6]

The latest available data on organic agriculture worldwide show that the year 2019 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 187 countries (data as of the end 2019). Consolidated data for 2020, which were not available at the time of writing this report, are expected to show the first impacts of the COVID-19 pandemic on organic markets. This data will be released by the countries during 2021 and made available in the 2022 edition of this report.

More than 72.3 million hectares of organic farmland

In 2019, 72.3 million hectares of organic agricultural land, including in-conversion areas, were recorded. The regions with the largest organic agricultural land areas are Oceania (35.9 million hectares, which is half the world's organic agricultural land) and Europe (16.5 million hectares, 23 percent). Latin America has 8.3 million hectares (11 percent) followed by Asia (5.9 million hectares, 8 percent), North America (3.6 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 (3.7 million hectares) and Spain (2.4 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 (9.6 percent) and Europe (3.3 percent; European Union 8.1 percent).

Liechtenstein has the highest organic share with 41.0 percent

Some countries reach far higher shares than the global share: Liechtenstein (41.0 percent) and Austria (26.1 percent) have the highest organic shares. In sixteen countries, 10 percent or more of the agricultural land is organic.

[1] Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[2] Claudia Meier, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[3] Bernhard Schlatter, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[4] Lauren Dietemann, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[5] Laura Kemper, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[6] Jan Trávníček, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

Growth in organic farmland - Increase of 1.1 million hectares or 1.6 percent

Organic farmland increased by 1.1 million hectares or 1.6 percent in 2019. Many countries reported a significant increase, for instance, India (18.6 percent increase; over 0.36 million hectares more) and Kazakhstan (18.6 percent increase; almost 0.1 million hectares more).

Increase of organic farmland in almost all regions

In 2019, organic agricultural land increased in Africa, Europe, Latin America, and Northern America (Table 6). The agricultural area decreased in Asia (-7.1 percent, -0.45 million hectares), mainly due to a drop in organic areas reported from China, and Oceania (-0.3 percent, -0.12 million hectares). The highest absolute growth was in Europe (+5.9 percent, +0.9 million hectares), followed by Northern America (+9.1 percent, +0.30 million hectares) and Latin America (+3.5 percent, +0.28 million hectares).

Apart from land dedicated to organic agriculture, there are further areas of organic land dedicated to other activities. The largest part of these is wild collection areas and areas for beekeeping. Further non-agricultural areas include aquaculture, forests, and grazing areas on non-agricultural land. These areas totalled 35.0 million hectares, and all the organic areas together summed up to 107.4 million hectares.

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 75).

Over two-thirds of the organic agricultural land was grassland/grazing areas (almost 49 million hectares), which increased in 2019 by 1.2 percent.

With over 13.1 million hectares, **arable land constitutes 18 percent of the organic** agricultural land. A decrease of 1.7 percent since 2018 was reported, mainly due to a decrease of organic arable land reported from China. Most of this category of land was used for cereals including rice (5.1 million hectares), followed by green fodder from arable land (almost 3.2 million hectares), oilseeds (1.7 million hectares), dry pulses and vegetables.

The significant growth in organic cotton production seen in 2017/18, when global fibre volumes rose 56 percent, continued into 2018/19 with a further 31 percent growth, according to the Textile Exchange. Global production reached 239′787 metric tons. Estimates show that the current growth trend will continue next year, though to a slightly lesser degree, with a ten percent growth expected. Globally, an estimated 222′134 farmers were growing certified organic cotton in 2018/19, spread across 19 countries and 418′935 hectares of certified land. For more information, see Barsley et al. on page 130.

Permanent crops account for seven percent of the organic agricultural land, amounting to over 4.7 million hectares. Compared to the previous survey, an increase of more than 17′000 hectares, or 0.4 percent, was reported. The most important crops are olives, with nearly 0.9 million hectares or 19 percent, coffee (over 0.7 million

hectares or 15 percent of the organic permanent cropland), nuts (0.6 million hectares or 13 percent), grapes (0.5 million hectares or 10 percent) and cocoa (almost 0.4 million hectares or 8 percent) (see page 71).

Organic producers on the rise – 3.1 million producers in 2019

There were at least 3.1 million organic producers in 2019.[1] Fifty-one percent of the world's organic producers are in Asia, followed by Africa (27 percent), Europe (14 percent) and Latin America (7 percent). The countries with the most producers are India (1'366'226), Uganda (210'353) and Ethiopia (203'602) (page 58). There has been an increase in the number of producers of more than 347'000, or 12.5 percent, compared to 2018.

Global market and EU organic imports

Global market reached more than 100 billion euros

Organic food and drink sales reached more than 106 billion euros, according to FiBL (page 64)[2,3] in 2019. In 2019, the countries with the largest organic markets were the United States (44.7 billion euros), Germany (12.0 billion euros), and France (11.3 billion euros). The **largest single market was the United States** (42 percent of the global market), followed by the European Union (41.4 billion euros, 39 percent) and China (8.5 billion euros, 8.0 percent). The highest per-capita consumption in 2019, with 344 euros, was found in Denmark. The highest organic market shares were reached in Denmark (12.1 percent), Switzerland (10.4 percent) and Austria (9.3 percent) (See the chapter on the FiBL survey on the global market, page 64).

Effect of the pandemic on the global organic market

Although North America and Europe generate most sales, their share of the total market is shrinking (Sahota (page 136). The coronavirus crisis is predicted to accelerate this trend as more regional markets for organic foods develop. In particular, the share of developing countries, such as China, India, Brazil and Indonesia, is likely to grow at a fast rate in the coming years. The pandemic, which began in spring 2020, has had a profound impact on our daily lives, as well as on the organic food industry. Consumers are turning to organic foods as they look more closely at personal health, wellness and nutrition. Organic is likely to benefit as the food industry transitions to a post-COVID world, writes Sahota (page 136). According to him, the coronavirus pandemic is likely to change the global organic food industry with several trends affecting the further

[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 112 billion U.S. dollars in 2019.

[3] One euro corresponded to 1.1195 U.S. dollars in 2019 according to the European Central Bank.

development of organic agriculture in various ways. Examples of such changes include the de-globalisation of food supply chains, increasing importance of food security, more government support; move towards traceability and transparency in food supply chains, changing consumer behaviour and increased importance of online retailing.

Organic imports in the European Union

The European Union, which is the second-biggest organic market, provided data on its organic imports, showing the key import products and key importing countries (based on volume in metric tons). In 2019, the EU imported a total of 3.2 million tonnes of organic agri-food products. Imports of tropical fruit (fresh or dried), nuts and spices represented the single biggest category, totalling 885'930 tonnes or 27.3 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 433´705 tonnes; 13.4 percent of the total organic import volume. Ukraine, the Dominican Republic, and Ecuador each have a 10 percent share of the total organic import volume. For more information, see the contribution about the EU organic imports on page 140.

Standards, regulations, policy support

According to the latest IFOAM survey on **organic regulations**, 72 countries had fully implemented organic regulations as of 2020. Twenty-two countries had regulations, which were not fully implemented, while 14 unregulated countries were drafting legislation. Among the countries that newly passed organic regulations in 2020 are Madagascar and Egypt. Some countries are majorly revising their existing regulations, among these are the European Union and the United States. Countries that have concluded significant amendments of their existing regulations in 2020 include the Philippines and Peru. For more information, see the chapter by Kirchner et al., page 152.

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. Despite the difficulties related to the impact of the COVID-19 pandemic in 2020, the number of PGS initiatives and producers involved and certified by them has been growing worldwide. They represent today a well-established guarantee system for organic agriculture in many countries. The overall trend towards an increase in the number of PGS initiatives and producers certified is maintained. To date, IFOAM – Organics International has recorded in its PGS database 235 PGS initiatives in 77 countries, with at least 1'153'220 producers involved and 1'110'964 producers certified. It is estimated that these producers manage over 755'000 ha of land (area under organic management that is PGS certified is not available for all PGS initiatives and countries). For more information, see the chapter by Moura e Castro et al. on page 158.

Statistics provided by **Demeter** International show that there are more than 4'400 Demeter farmers worldwide with over 220'000 hectares in 62 countries (July 2020). 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 the article by Simpfendörfer and Fischer, page 165.

When it comes to fostering organic production and consumption, of particular interest to the organic sector is adopting sustainability-oriented **public food procurement policies** and standards applied to food and catering services in public institutions. Such measures can shift buying power to support environmental, health and socio-economic objectives in line with the principles of organic agriculture. As shown with several examples from all contents, public food procurement can help create new and stable markets for organic products, stimulate changes in food habits and foster conversion to organic agriculture. For more information, see the article by Varini and Hysa, page 170.

Organic in the Continents

Africa

There were more than **2 million hectares of certified organic agricultural land in Africa** in 2019. Compared to 2018, Africa reported 177'054 hectares more, a 9.5 percent increase. There were at least 850'000 producers. Tunisia was the country with the largest organic area (with almost 287'000 hectares in 2018), 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 São Tomé and Príncipe, with 24.9 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, cocoa, nuts, oilseeds, and cotton (see page 189). Five countries in Africa have legislation on organic agriculture, and five countries are drafting legislation. Six countries have a national standard but no organic legislation.

In Africa, the Ecological Organic Agriculture Initiative realised several achievements during 2020. Geographical coverage expanded to include Rwanda as the ninth country. The value chains and market development approach was adopted with all participating partners in nine countries in East and West Africa. An important current project is the Knowledge Center for Organic Agriculture in Africa, which aims at ensuring knowledge hubs in West, Eastern, North and Southern Africa and later also in Central Africa. These hubs are successfully introduced as an innovative strategy for promoting organic agriculture with actors in Africa. The African Organic Network AfrONet as custodian of the African organic movements and organic sector development aims to strengthen and support national, regional and continental networks, overseeing the development and growth of the Ecological Organic Agriculture Initiative for Africa. AfrONet has been bringing together all the networks, partners and other stakeholders under the African Organic Conference platform. Morocco will be hosting the 5th Conference in Marrakesh in November 2021. Furthermore, planning for the 6th West African Organic Conference (WAOC) to be held in Burkina Faso from October 13 to 16, 2021. For more information, see the chapter by Amudavi, page 180.

Asia

The total area dedicated to **organic agriculture in Asia was more than 5.9 million hectares in 2019**. There were 1.4 million producers, most of which were in India. The leading countries by area were India (2.3 million hectares) and China (over 2.2 million hectares). Timor-Leste had the highest proportion of organic agricultural land (8.5 percent) (page 189). Twenty-one countries in the region have legislation on organic agriculture, and seven countries are drafting legislation.

Together with the rest of the world, Asia has suffered much due to the effects of COVID-19, write Hossain et al. (page 198). As traditional markets were closed and schools, offices and other establishments were shut down, every stakeholder across the supply chain was affected in one way or another. However, the resiliency of many countries in Asia was highlighted, as they searched for ways to mitigate the effects of the pandemic. In South Korea, the closure of schools meant the cessation of school meals, which was a significant source of income for many organic farmers. In response, a Countermeasures Committee for COVID-19 was established, providing thousands of food packages of environmentally-friendly farm products to more than 6'000 self-quarantined people. In Japan, there was a major development in the Basic Plan for Agriculture and Management, aiming to triple the number of organic farmers and organic lands by 2030. In Indonesia, the National Medium-Term Development Plan IV (2020-2024) will increase the policies related to organic agriculture. Finally, the Philippines had one of the most significant milestones in organic agriculture with the amendment of the Organic Act of 2010, including Participatory Guarantee Systems (PGS) under the country's national organic standards.

In 2020, IFOAM Asia expanded the networking activities of the Asian Local Governments for Organic Agriculture (ALGOA), which celebrated its 5th anniversary. The 6th ALGOA Summit was a historic occasion as ALGOA took the initiative in linking up with the International Network of eco-regions and other European partners, to launch the Global Alliance of Organic Districts (GAOD). Another significant activity was that the Asian Organic Youth Forum took the initiative to expand its organic youth network globally and launched the Young Organics Global Network in September 2020. More information can be found in the chapter by Hossain et al., page 198.

Europe

As of the end of 2019, **16.5 million hectares of agricultural land in Europe** (European Union: 14.6 million hectares) were managed organically by over 430'000 producers (European Union: almost 344'000). In Europe, 3.3 percent of the agricultural area was organic (European Union: 8.1 percent). Organic farmland has increased by over 0.97 million hectares compared to 2018. The countries with the largest organic agricultural areas were Spain (2.4 million hectares), France (2.2 million hectares) and Italy (2.0 million hectares). In twelve countries, at least 10 percent of the farmland was organic: Liechtenstein has the lead (41.0 percent), followed by Austria (26.1 percent) and Estonia (22.3 percent). Retail sales of organic products totalled 45.0 billion euros in 2019 (European Union: 41.4 billion euros), an increase of 8.0 percent since 2018. The largest

market for organic products in 2019 was Germany, with retail sales of 12.0 billion euros, followed by France (11.3 billion euros) and Italy (3.6 billion euros) (see the article by Trávníček et al., page 229).

In December 2019, the European Commission unveiled the European Green Deal, a new growth strategy aiming for Europe to be the first climate-neutral continent by becoming a modern, resource-efficient economy. The Farm to Fork (F2F) strategy, which was published in April 2020, is part of the European Green Deal and includes a target of increasing the total of the EU's agricultural land under organic farming to least 25% by 2030 and a significant increase in organic aquaculture. As part of the F2F strategy, the Commission pledged to review the EU promotion programme for agricultural and food products to enhance its contribution to sustainable production and consumption. For more information about the Farm to Fork strategy, the Common Agricultural Policy and research updates, see the article by FiBL and IFOAM Organics Europe on page 219.

Latin America and the Caribbean

In Latin America, **over 224'000 producers managed almost 8.3 million hectares of agricultural land organically in 2019**. This constituted 11 percent of the world's organic land and 1.2 percent of the region's agricultural land. The leading countries were Argentina (3.7 million hectares), Uruguay (2.1 million hectares) and Brazil (1.3 million hectares). The highest organic shares of total agricultural land were in Uruguay (15.3 percent), French Guiana (11.3 percent) and the Dominican Republic (5.5 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 two countries are drafting legislation. Brazil has the largest market for organic products in Latin America. Like Asia, demand is coming from a growing middle class seeking healthy, nutritious foods.

In the last 20 years, the organic agriculture sector has developed, especially organised export-oriented family farmers focused on international trade to supply markets in the European Union, the United States, Canada and Japan. Organic production of coffee, cocoa, tropical fruits (banana, mango), ginger, turmeric and Andean grains stand out. This is especially noteworthy in the industry of fine aroma cacao and chocolate – here the cacao value chain has been developed based on native genetic resources and the organisation of cacao growers giving special attention to the quality of the final product. Notable developments which took place in 2020 included the implementation of the Memorandum of Understanding on Organic Products between Chile and Brazil, and in Mexico, the competent Mexican authority SENASICA is also developing equivalence agreements with its main trade partners, the United States, Canada and the EU. The equivalence will allow the free flow of Mexican organic products that hold the National Organic Seal to the world's most competitive markets. For more information, see the chapter by Flores on page 268.

The Inter-American Commission for Organic Agriculture (CIAO), which comprises Competent Authorities for Control of Organic Agriculture in the region, is a technical

entity created in July 2008 with the aim of contributing to the development of organic agriculture and organic trade in countries in the Americas. In May 2020, CIAO and IFOAM - Organics International signed a Memorandum of Understanding to strengthen the collaboration among the parties. Since 2019, CIAO and the Research Institute of Organic Agriculture FiBL have been working together to collect statistical data on organic production. For more information, see the article by Lacaze & Gámez, page 272.

North America

In North America, over **3.6 million hectares of farmland were managed organically in 2019**. Of these, 2.3 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 291).

New records were achieved in both the US organic food market and organic non-food market. Organic food sales reached 50.1 billion US dollars (approx. 44.7 billion euros), an increase of 4.5 percent compared to 2018. Sales of organic non-food products jumped by 8.7 percent to 6 billion US dollars. Almost six percent of the food sold in the United States is now organic.

In the United States (although 2020 numbers are not yet available), the COVID-19 pandemic has had dramatic consequences for the organic sector. As shoppers searched for healthy, clean food to feed their families, organic proved to be the food of choice for home consumption. Demand for organic fresh produce grew substantially from March onward as consumers continued at-home eating in the face of restaurant closures. In fact, the Organic Produce Network predicted double-digit growth of fresh produce sales in its analysis during the year. Fresh fruit and vegetable sales averaged 18 percent year-over-year growth in each of the first three quarters. Another notable development were the Organic Trade Association's 'Organic Fraud Prevention Solutions' programme and a fraud-fighting training package from USDA. Furthermore, the USDA's National Organic Program (NOP) published its Strengthening Organic Enforcement and Oversight proposed rule to support the continued growth of the organic market and improve oversight at critical links in the supply chain. For more information, see the article by Haumann on page 284.

Canada's total organic market (including food and non-food items) reached 6.93 billion Canadian dollars (approx. 4.7 billion euros), 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 2.6 to 3.2 percent (2019).

In Canada, the most recent State of Organic Performance Report outlines the current forms of support for the organic sector from Federal, Provincial and Territorial jurisdictions and provides a broad set of summarised recommendations for each level of government. One finding includes that while there is great consumer confidence in the Canada Organic Regime, and recognition is growing for the Canadian Organic Logo, the lack of comprehensive programming assistance at the provincial/territorial level leaves a patchwork of provincially applied standards for intra-provincial trade.

There is also a need for the federal government to provide more robust and comprehensive data on production, imports, exports and consumption, which are paramount for good decision making on government objectives related to climate change. For more information, see the chapter by Loftsgard on page 289.

Oceania

This region includes Australia, New Zealand, and the Pacific Island states. Altogether, there were over 18'000 producers, managing almost 36.0 million hectares. This constituted 9.7 percent of the region's agricultural land 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 New Zealand (almost 89'000 hectares) and Samoa (over 41'000 hectares). The highest organic shares of all national agricultural land were in Samoa (14.5 percent), followed by Australia (9.9 percent), Fiji (5.5 percent), Vanuatu (4.5 percent), Solomon Islands (3.5 percent) and French Polynesia (3.4 percent). Four countries in Oceania have legislation on organic agriculture, and twelve countries have a national standard but no organic legislation.

In Australia, fueled by years of drought, hot summer temperatures and an abundance of fuel loads, such as dry leaf litter, over ten million hectares of bushland were incinerated. For some of the hardest-hit regions, re-establishing their organic status will take much time, and some have lost entire orchards and native tea tree plantations. Many of these operators will be without production for years. Due to the drought and shortages of available feed for many livestock producers, the year 2020 has seen the largest demand for organic hay and grain for at least a decade with livestock fodder. Following on from the improvements to the regulatory system for exports, in December 2020, the Australian Minister for Agriculture, Water and the Environment has requested his Department appoint an Organics Industry Advisory Group to investigate the creation of a nationwide regulatory framework for the production and sale of organic products domestically. The group will review whether the current domestic regulatory framework is fit for purpose and better understand the potential of improving current regulations to facilitate the organic industry's development and growth. For more information about Australia, see the report by Ford on page 298.

While generally, certification continues to expand across the Pacific, some countries are reflecting a drop in certified land in recent years. This can be attributed to natural disasters affecting perennial crops, such as coconuts, causing the licensees to suspend or leave certification programs until their crops produce again. Governments are becoming more and more interested in creating a supportive policy environment. A significant development is regional and national agencies and development partners increasingly recognising the value of organic agriculture as a development tool for the Pacific islands context. The local market for organic products is expected to continue to expand as the tourism and hospitality industries in the Pacific Islands develop their brand for organic and sustainability (see the chapter by Mapusua, page 302).

Outlook

The year 2020 will be remembered for the global COVID-19 pandemic, the impact of which is likely to be felt for a much longer time, writes Louise Luttikholt, executive Director of IFOAM – Organics International. According to her, the crisis revealed the vulnerability of global food systems and that the transition to sustainable and resilient food systems is needed; in COVID times, it almost looked as if food was regarded as medicine. It remains to be seen if the 2021 United Nation's Food Systems Summit, aiming to 'launch bold and new actions to transform the way the world produces and consumes food', will take these signals seriously. For more information, see the chapter by Luttikholt on page 310.

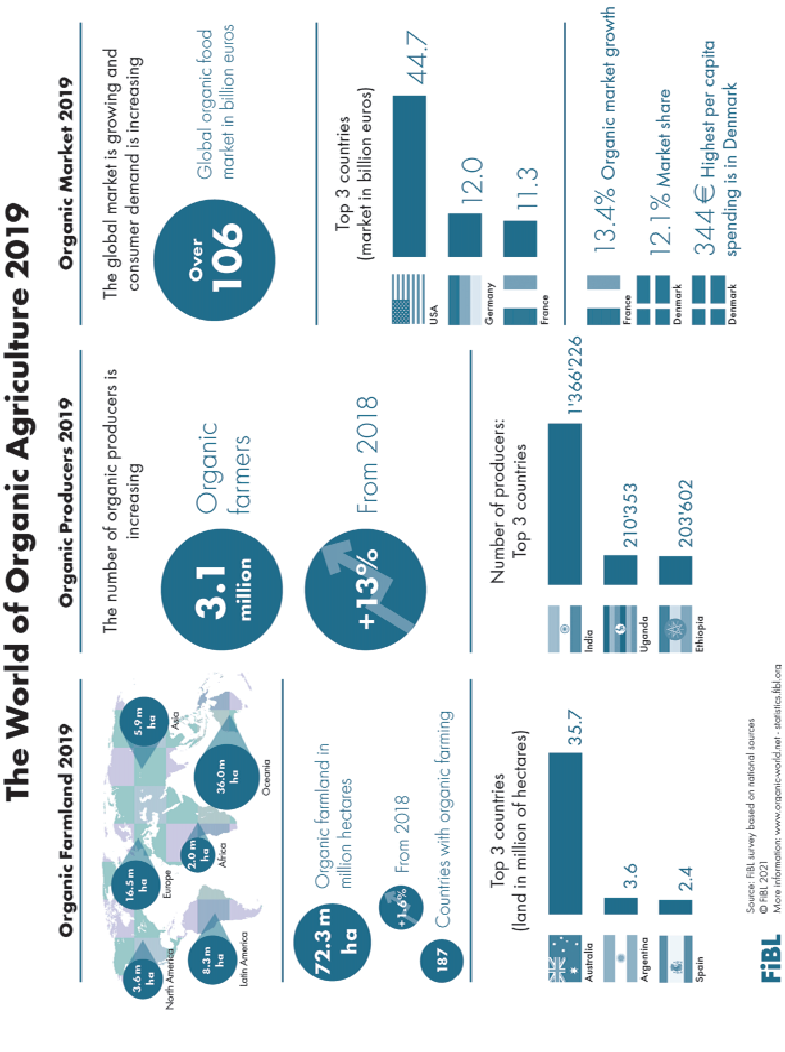
IFOAM Organic World Congress and Statistics pre-conference

The 20th Organic World Congress (OWC), originally scheduled to take place in 2020, will be held from September 6 to 10, 2021 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 focusing on statistics. More information is available at OWC 2021 website https://owc.ifoam.bio/2021/.

Next FiBL survey on organic agriculture worldwide

The next global organic survey will start in mid-2021; data will be published in February 2022 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 2022 edition of "The World of Organic Agriculture." Corrections will also be posted on www.organic-world.net.

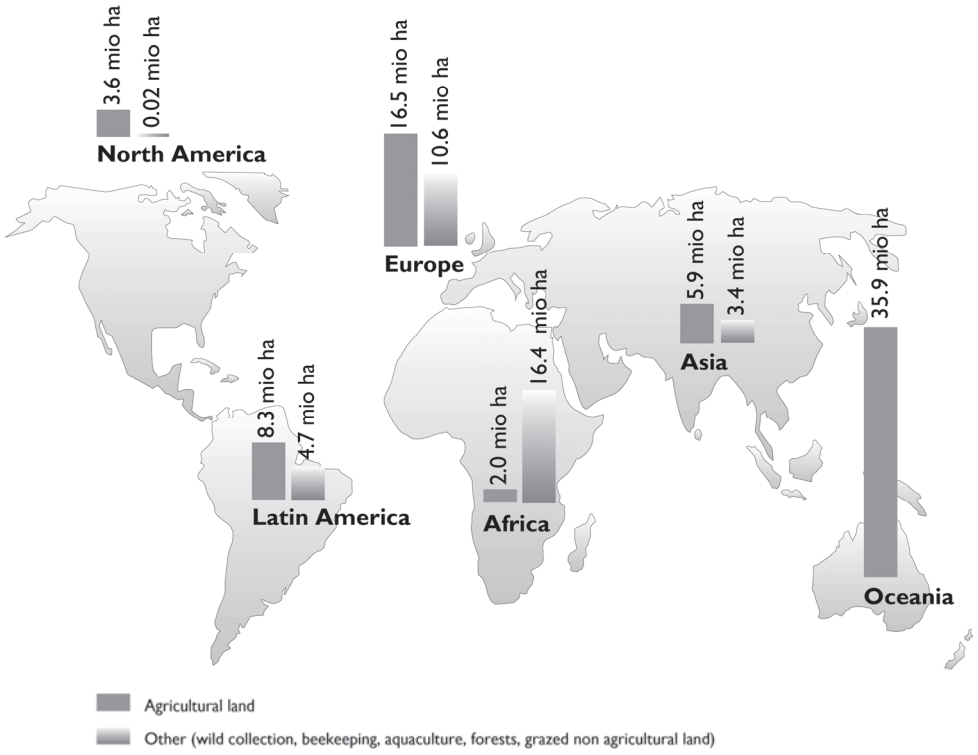
Contact: helga.willer@fibl.org.



Infographic 1: Organic agriculture worldwide - key indicators 2019

Source: FiBL survey 2021

Organic Agriculture Worldwide: Current Statistics



Map 1: Organic agricultural land and non-agricultural areas in 2019

Source: FiBL survey 2021

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

BERNHARD SCHLATTER,[1] JAN TRÁVNÍČEK,[2] CLAUDIA MEIER,[3] OLIVIA KELLER[4] AND HELGA WILLER[5]

Introduction

The 22nd 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. The survey was supported by the Swiss State Secretariat for Economic Affairs (SECO), the International Trade Centre (ITC),[6] the Sustainability Fund of Coop Switzerland,[7] and NürnbergMesse.[8]

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: ACO Certification, BioInspecta, CCPB, CERES, Certisys, Control Union, Ecocert, Ecoglobe, Ekoagros, ICEA, Imocert, Kiwa BCS Oko-Garantie GmbH, LACON, LETIS, NASAA Certified Organic (NCO), Organic Agriculture Certification Thailand (ACT), Organización Internacional Agropecuaria (OIA), OneCert and Quality Certification Services (QCS).

Our collaboration with the Inter-American Commission for Organic Agriculture (CIAO) eased data collection in Latin American and the Caribbean substantially. Data from the Mediterranean countries were supplied by the Mediterranean Organic Agriculture Network (MOAN, c/o Mediterranean Agronomic Institute of Bari). Data from the Pacific Islands was provided by the Pacific Organic and Ethical Trade

[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] Claudia Meier, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[4] Olivia Keller, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[5] Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[6] Since 2014, data collection on organic agriculture worldwide and on further voluntary standards 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
[7] Since 2019, the data collection on organic agriculture has been supported by the Sustainability Fund of Coop Switzerland.
[8] 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.

Community (POET.com). Another important source covering many countries is Eurostat. A list of all data sources and contacts is provided in the annex.

Countries covered

In total, data from 187 countries/territories were available. 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 2019

Region	Countries* with data on organic agriculture	Countries per region[1]	Share of countries that provided data (%)
Africa	47	60	77%
Asia	42	50	82%
Europe	48	52	94%
Latin America and the Caribbean	35	52	73%
North America	3	5	75%
Oceania	12	29	50%
World	**187**	**249**	**78%**

Source: FiBL survey 2021

*Where the designation "country" appears in this book, it covers countries or territories, see UNSTAT website.[2]

Indicators covered

Data on the following indicators were collected:

- organic area and production 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 https://orgprints.org/36848/).

[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 2021 survey

With the 2021 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.

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: For some countries, areas certified by Participatory Guarantee Systems (PGS) have been included. (For more information about PGS, see the article by Moura e Castro et al. on page 158).

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.

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 317).

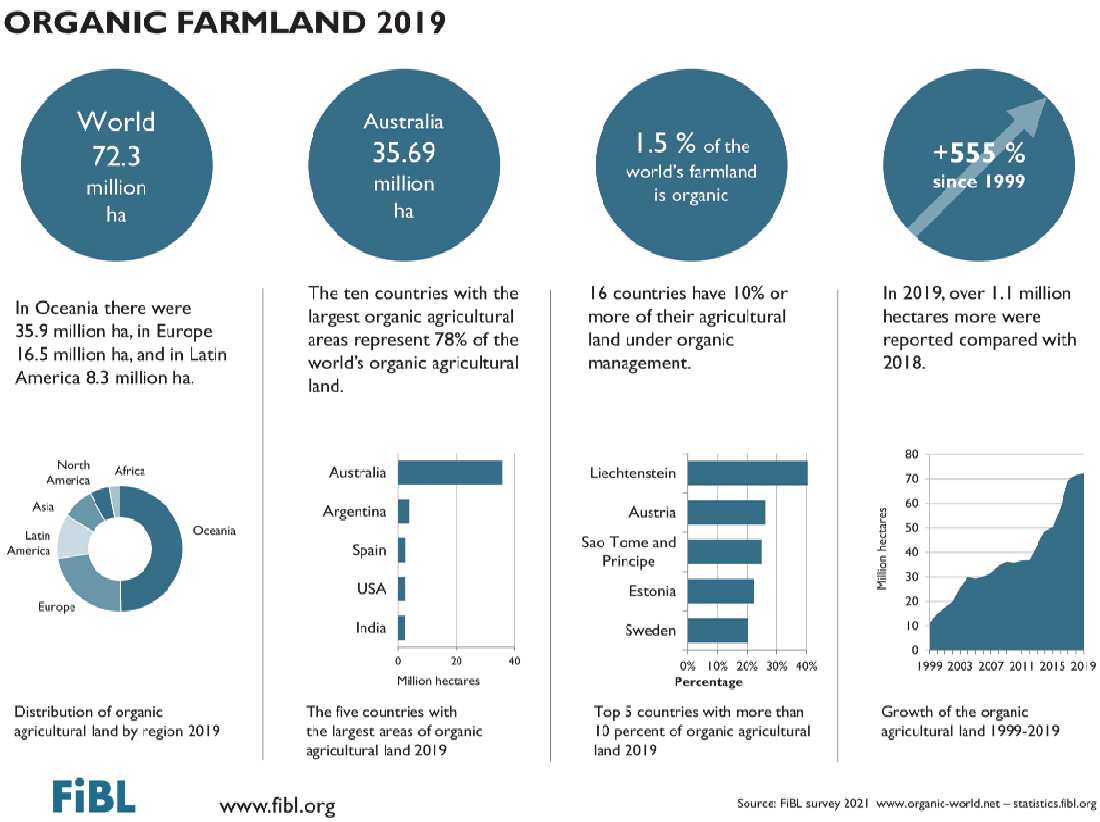
Direct year-to-year comparison: A direct year-to-year comparison is not possible for all data, as the data sources may change, data may not be provided on an annual basis, data may have been revised or corrected, data access may improve, or exchange rates might change from year to year.

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 statistics.fibl.org.

Metadata: Metadata for the FiBL survey on organic agriculture worldwide are available on Organic Eprints at https://orgprints.org/36848.

[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 2019

Source: FiBL survey 2021

Organic land

Organic agricultural land

In 2019, 72.3 million hectares were under organic agricultural management worldwide.[1]

The region with the most organic agricultural land is Oceania, with 35.9 million hectares, followed by Europe with 16.5 million hectares, Latin America (8.3 million hectares), Asia (5.9 million hectares), North America (3.6 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 23 percent of the world's organic agricultural land followed by Latin America with 12 percent (Figure 1, page 38).

Australia is the country with the most organic agricultural land (increased by +200 percent in the last decade); it is estimated that 97 percent (increased by +200 percent in the last decade) of the farmland is extensive grazing areas. Argentina is second, followed by Spain in third place (Figure 2, page 38). The 10 countries with the largest organic agricultural areas have a combined total of 56.5 million hectares and constitute almost 80 percent of the world's organic agricultural land.

Apart from the organic agricultural land, there are further organic areas such as wild collection areas. These areas constitute approximately 35 million hectares.

Table 2: World: Organic agricultural land (including in-conversion areas) and regions' shares of the global organic agricultural land 2019

Region	Organic agricultural land [hectares]	Regions' shares of the global organic agricultural land
Africa	2'030'830	2.8%
Asia	5'911'622	8.2%
Europe	16'528'677	22.9%
Latin America	8'292'139	11.5%
Northern America	3'647'623	5.0%
Oceania	35'881'053	49.6%
World*	**72'285'656**	**100.0%**

Source: FiBL survey 2021. 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.

Distribution of organic agricultural land by region 2019
Source: FiBL survey 2021

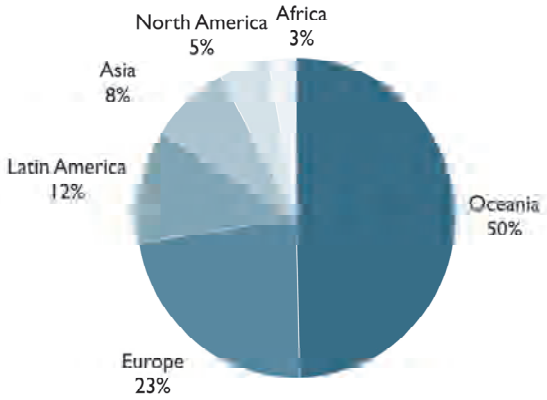


Figure 1: World: Distribution of organic agricultural land by region 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

The ten countries with the largest areas of organic agricultural land 2019
Source: FiBL survey 2021

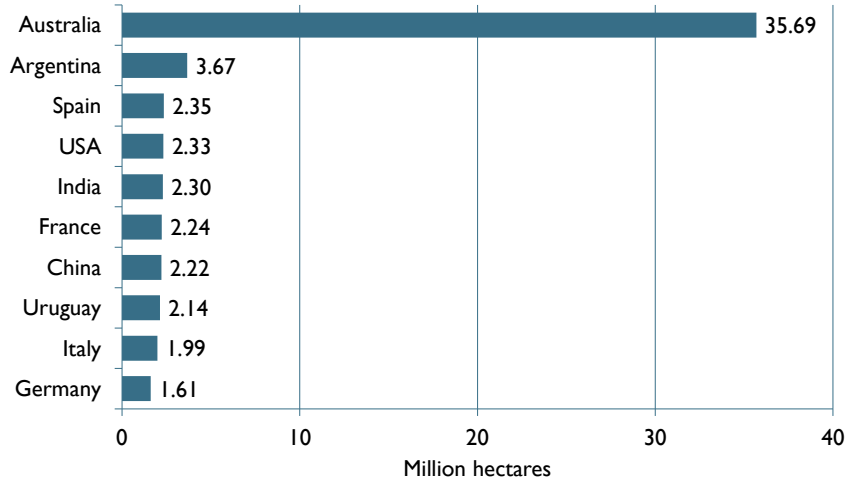


Figure 2: World: The ten countries with the largest areas of organic agricultural land 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Table 3: World: Organic agricultural land (including in-conversion areas) by country 2019 (sorted)

For an alphabetical country list, see page 313.

Country	Hectares
Australia	35'687'799
Argentina	3'672'350
Spain	2'354'916
United States of America	2'326'551
India	2'299'222
France	2'240'797
China	2'216'000
Uruguay	2'143'640
Italy	1'993'225
Germany	1'613'785
Canada	1'321'072
Brazil	1'283'054
Russian Federation	674'370
Austria	669'921
Sweden	613'964
Czech Republic	540'986
Greece	528'752
Turkey	518'435
Poland	507'637
Ukraine	467'980
United Kingdom	459'275
Romania	395'228
Finland	306'484
Hungary	303'190
Mexico	301'891
Kazakhstan	294'289
Portugal	293'213
Latvia	289'796
Tunisia	286'623
Denmark	285'526
Tanzania' United Republic of	278'467
Indonesia	251'619
Lithuania	242'118
Peru	235'592
Ethiopia	221'189
Estonia	220'737
Slovakia	197'565
Thailand	188'451
Uganda	183'598
Switzerland	172'713
Philippines	168'352
Sierra Leone	157'531
Kenya	154'488
Bolivia (Plurinational State of)	144'231
Dominican Republic	134'375
Bulgaria	117'779

Country	Hectares
Egypt	116'000
Croatia	108'127
Belgium	93'119
New Zealand	88'871
Democratic Republic of the Congo	88'727
Guatemala	88'178
Burkina Faso	87'490
Madagascar	76'530
Ireland	73'952
Sudan	73'903
Sri Lanka	70'436
Netherlands	68'068
Côte d'Ivoire	66'728
Pakistan	64'885
Viet Nam	61'901
Paraguay	57'566
Nigeria	55'047
Slovenia	49'638
Ecuador	47'836
Norway	45'312
Nicaragua	42'952
Samoa	41'083
Togo	38'506
Azerbaijan	37'630
Timor-Leste	32'472
Falkland Islands (Malvinas)	31'937
Ghana	31'199
Colombia	30'447
South Africa	30'214
Republic of Korea	29'711
Honduras	29'274
Moldova	27'833
Cambodia	25'757
Papua New Guinea	24'696
Saudi Arabia	24'517
Fiji	22'612
Serbia	21'266
Chile	20'897
Syrian Arab Republic	19'987
Kyrgyzstan	19'054
Benin	15'164
Myanmar	12'948
Malawi	12'294
Iran (Islamic Republic of)	11'916
Mali	11'300

Country	Hectares
São Tomé and Príncipe	10'934
Japan	10'792
Tajikistan	10'340
Morocco	9'917
Taiwan	9'536
Nepal	9'361
Lao People's Democratic Republic	8'952
Costa Rica	8'832
Vanuatu	8'368
Mozambique	7'762
Bhutan	6'632
Senegal	6'486
Israel	6'307
Cyprus	6'240
Panama	5'929
Luxembourg	5'814
Iceland	5'740
Palestine	5'388
Montenegro	4'751
United Arab Emirates	4'642
Solomon Islands	4'086
North Macedonia	3'711
French Guiana (France)	3'667
Haiti	3'333
Cuba	2'373
Bangladesh	2'249
El Salvador	1'708
Bosnia and Herzegovina	1'692
Lebanon	1'574
French Polynesia	1'562
Réunion (France)	1'474
Liechtenstein	1'470
Georgia	1'452
Jordan	1'446
Belarus	1'375
Malaysia	1'276
Rwanda	1'265
Comoros	1'164
Tonga	1'119
Chad	1'113
Kosovo	1'036
Guinea	1'000
Uzbekistan	932
Zimbabwe	848
Eswatini	843
New Caledonia	800
Afghanistan	786
Guinea-Bissau	781
Algeria	772
Albania	653

Country	Hectares
Martinique (France)	613
Armenia	594
Cape Verde	495
Guadeloupe (France)	492
Jamaica	374
Niger	254
Faroe Islands	251
Dominica	240
Zambia	207
Cameroon	204
Channel Islands	180
Namibia	112
Suriname	109
Grenada	84
Burundi	84
Belize	77
Gambia	68
Iraq	63
Mongolia	61
Malta	55
Bahamas	49
Niue	43
Oman	43
Mayotte	41
Kuwait	33
United States Virgin Islands	26
Cook Islands	15
Singapore	15
Puerto Rico	14
Mauritius	6
Andorra	2
Liberia	2
World*	**72'285'656**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317
**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 (9.6 percent) followed by Europe with 3.3 percent and Latin America with 1.2 percent. In the European Union, the organic share of the total agricultural land is 8.1 percent. In the other regions, the share is less than one percent (Table 4).

Many individual countries, however, have a much higher organic share (Table 5, page 43), 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 41 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 São Tomé and Príncipe.

However, 58 percent of the countries for which data is available have less than one percent of their agricultural land under organic management (Figure 4: World: Distribution of the organic shares of the agricultural land 2019).

Table 4: World: Organic agricultural land (including in-conversion areas) and organic share of total agricultural land by region 2019

Region	Organic agri. land [ha]	Share of total agri. land
Africa	2'030'830	0.2%
Asia	5'911'622	0.4%
Europe	16'528'677	3.3%
Latin America	8'292'139	1.2%
North America	3'647'623	0.8%
Oceania	35'881'053	9.6%
World*	**72'285'656**	**1.5%**

Source: FiBL survey 2021.
** 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

Countries with an organic share of at least 10 percent of the agricultural land 2019

Source: FiBL survey 2021

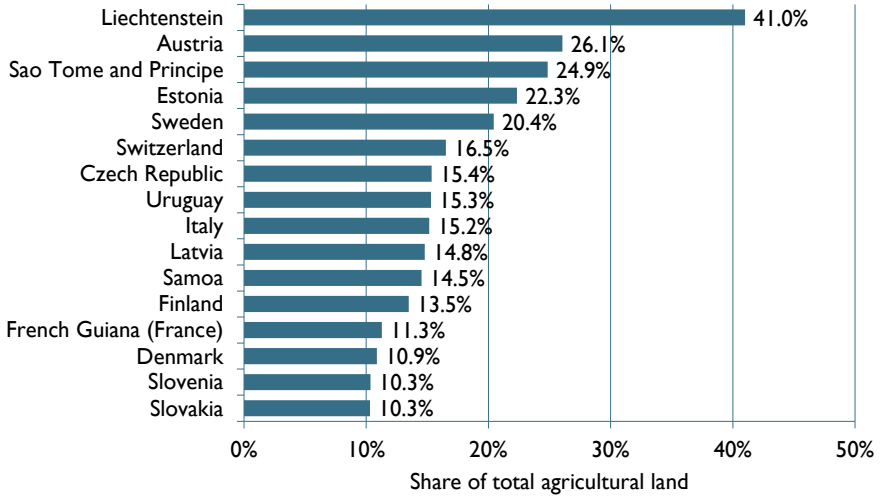


Figure 3: World: Countries with an organic share of the total agricultural land of at least 10 percent 2019

Source: FiBL survey 2021, 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 317

Distribution of the organic shares of the agricultural land 2019

Source: FiBL survey 2021

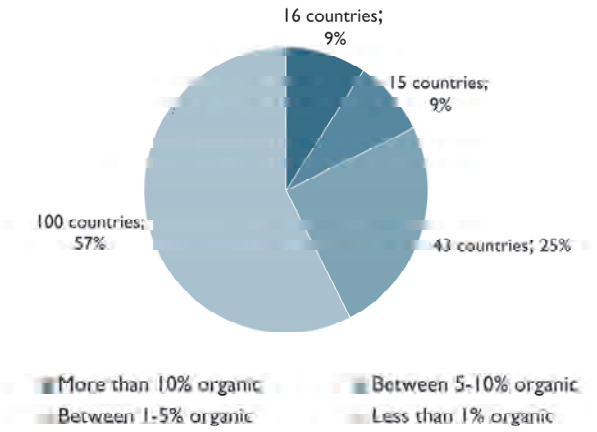


Figure 4: World: Distribution of the organic shares of the agricultural land 2019

Source: FiBL survey 2021, 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 317

Table 5: World: Organic shares of total agricultural land by country 2019 (sorted)

For an alphabetical country list, see page 313.

Country	Organic share
Liechtenstein	41.0%
Austria	26.1%
São Tomé and Príncipe	24.9%
Estonia	22.3%
Sweden	20.4%
Switzerland	16.5%
Czech Republic	15.4%
Uruguay	15.3%
Italy	15.2%
Latvia	14.8%
Samoa	14.5%
Finland	13.5%
French Guiana (France)	11.3%
Denmark	10.9%
Slovenia	10.3%
Slovakia	10.3%
Australia	9.9%
Germany	9.7%
Spain	9.7%
Greece	8.7%
Timor-Leste	8.5%
Faroe Islands	8.4%
Portugal	8.2%
Lithuania	8.1%
France	7.7%
Croatia	7.2%
Belgium	6.9%
Hungary	5.7%
Dominican Republic	5.5%
Fiji	5.3%
Cyprus	5.0%
Norway	4.6%
Vanuatu	4.5%
Luxembourg	4.4%
Sierra Leone	4.0%
Netherlands	3.7%
Solomon Islands	3.5%
Poland	3.5%
French Polynesia	3.4%
Tonga	3.2%
Réunion (France)	3.1%
Egypt	3.0%
Tunisia	2.9%
Romania	2.9%
Falkland Islands (Malvinas)	2.8%
United Kingdom	2.6%
Sri Lanka	2.5%
Argentina	2.5%

Country	Organic share
Bulgaria	2.3%
Guatemala	2.3%
Canada	2.3%
Singapore	2.2%
Papua New Guinea	2.1%
Martinique (France)	2.0%
Channel Islands	2.0%
Montenegro	1.8%
Republic of Korea	1.8%
Ireland	1.6%
Turkey	1.4%
Philippines	1.4%
Bhutan	1.3%
India	1.3%
Uganda	1.3%
Moldova	1.2%
United Arab Emirates	1.2%
Taiwan	1.2%
Palestine	1.2%
Ukraine	1.1%
Grenada	1.1%
Cook Islands	1.0%
Israel	1.0%
Togo	1.0%
Peru	1.0%
Dominica	1.0%
Guadeloupe (France)	1.0%
Comoros	0.9%
Ecuador	0.9%
Honduras	0.9%
Niue	0.9%
Thailand	0.9%
New Zealand	0.8%
Nicaragua	0.8%
Azerbaijan	0.8%
Burkina Faso	0.7%
Tanzania, United Republic of	0.7%
United States Virgin Islands	0.7%
Cape Verde	0.6%
Serbia	0.6%
Ethiopia	0.6%
United States of America	0.6%
Kenya	0.6%
Brazil	0.5%
Viet Nam	0.5%
Costa Rica	0.5%
Malta	0.5%
Cambodia	0.5%

Country	Organic share
New Caledonia	0.4%
China	0.4%
Indonesia	0.4%
Benin	0.4%
Bolivia (Plurinational State of)	0.4%
Lao People's Democratic Republic	0.4%
Iceland	0.4%
Bahamas	0.3%
Côte d'Ivoire	0.3%
Russian Federation	0.3%
North Macedonia	0.3%
Mexico	0.3%
Democratic Republic of the Congo	0.3%
Paraguay	0.3%
Panama	0.3%
Kosovo	0.2%
Japan	0.2%
Lebanon	0.2%
Nepal	0.2%
Tajikistan	0.2%
Malawi	0.2%
Ghana	0.2%
Mayotte	0.2%
Madagascar	0.2%
Haiti	0.2%
Kyrgyzstan	0.2%
Pakistan	0.2%
Syrian Arab Republic	0.1%
Jordan	0.1%
Kazakhstan	0.1%
Chile	0.1%
Suriname	0.1%
El Salvador	0.1%
Sudan	0.1%
Myanmar	0.1%
Guinea-Bissau	0.1%
Bosnia and Herzegovina	0.1%
Jamaica	0.1%
Nigeria	0.1%
Senegal	0.1%
Rwanda	0.1%
Eswatini	0.1%
Colombia	0.1%
Georgia	0.1%
Albania	0.1%
Belize	0.04%
Cuba	0.04%
Armenia	0.04%
Morocco	0.03%

Country	Organic share
South Africa	0.03%
Mali	0.03%
Iran (Islamic Republic of)	0.03%
Bangladesh	0.02%
Kuwait	0.02%
Mozambique	0.02%
Belarus	0.02%
Malaysia	0.01%
Saudi Arabia	0.01%
Gambia	0.01%
Andorra	0.01%
Puerto Rico	0.01%
Guinea	0.01%
Mauritius	0.01%
Zimbabwe	0.01%
Burundi	0.004%
Uzbekistan	0.004%
Oman	0.003%
Chad	0.002%
Cameroon	0.002%
Afghanistan	0.002%
Algeria	0.002%
Zambia	0.001%
Iraq	0.001%
Niger	0.001%
Namibia	0.0003%
Liberia	0.0001%
Mongolia	0.0001%
Bermuda (Processing)	
Brunei Darussalam (Aquaculture)	
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 2021, 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 317

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: World: Growth of the organic agricultural land and organic share 1999-2019). In 2019, 1.1 million hectares, or 1.6 percent, more were reported compared with 2018. Many countries reported a significant increase, for instance, India (18.6 percent increase; over 0.36 million hectares more) and France (10.1 percent increase; almost 0.21 million hectares more). In addition, Ukraine (51.4 percent increase; almost 0.16 million hectares more) and Mexico (almost 0.12 million hectares more) reported significant increases (Figure 7: World: The ten countries with the highest increase of organic agricultural land 2019).

In 2019, the organic agricultural land increased Africa, Europe, Latin America and Northern America (Table 6). The agricultural area decreased in Asia (-7.1 percent, -0.45 million hectares; mainly due to a drop in organic farmland reported from China) and Oceania (-0.3 percent, -0.12 million hectares). The highest absolute growth was in Europe (+5.9 percent, +0.9 million hectares), followed by Northern America (+9.1 percent, +0.30 million hectares) and Latin America (+3.5 percent, +0.28 million hectares).

Ninety countries experienced an increase in the area of their organic agricultural land, while a decrease was reported in 48 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 2018-2019 and 10 years growth

Region	Organic agri. land 2018 [ha]	Organic agri. land 2019 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
Africa	1'854'646	2'030'830	176'184	9.5%	958'706	89.4%
Asia	6'364'778	5'911'622	-453'156	-7.1%	3'453'707	140.5%
Europe	15'607'636	16'528'677	921'042	5.9%	6'499'896	64.8%
Latin America	8'008'581	8'292'139	283'559	3.5%	752'496	10.0%
North America	3'342'849	3'647'623	304'774	9.1%	1'174'944	47.5%
Oceania	35'999'373	35'881'053	-118'320	-0.3%	23'735'998	195.4%
World*	**71'172'783**	**72'285'656**	**1'112'873**	**1.6%**	**36'571'729**	**102.4%**

Source: FiBL survey 2021, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 317

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

Growth of the organic agricultural land and organic share 1999-2019

Source: FiBL-IFOAM-SOEL-Surveys 2001-2021

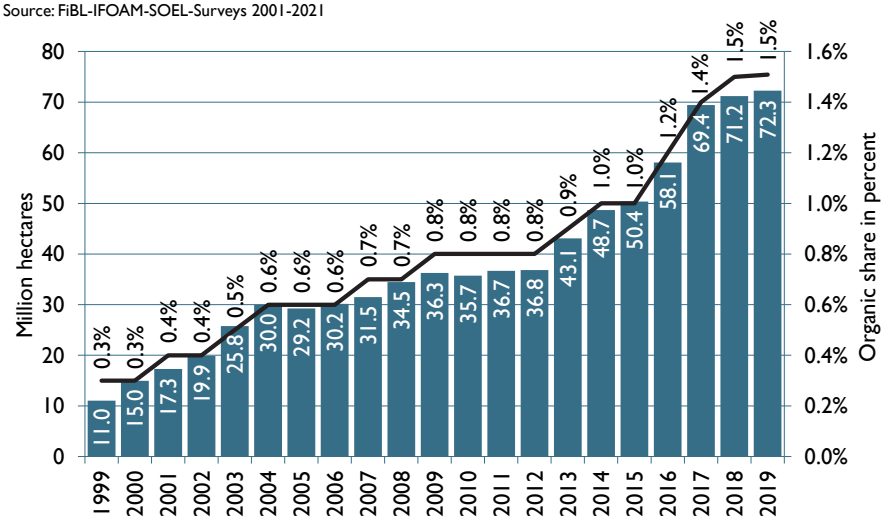


Figure 5: World: Growth of the organic agricultural land and organic share 1999-2019

Source: FiBL-IFOAM-SOEL surveys 2001-2021

Growth of the organic agricultural land by continent 2011-2019

Source: FiBL-IFOAM survey 2012-2021

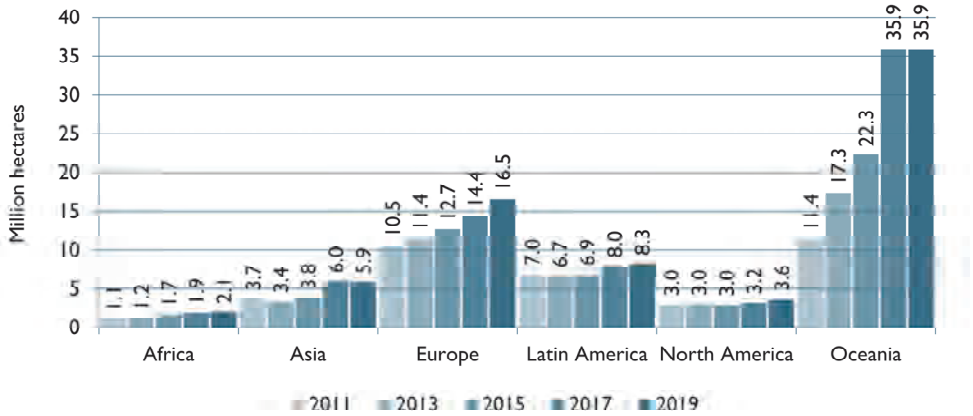


Figure 6: World: Growth of the organic agricultural land by continent 2011 to 2019

Source: FiBL-IFOAM-SOEL surveys 2012-2021

The ten countries with the highest increase of organic land 2019

Source: FiBL survey 2021

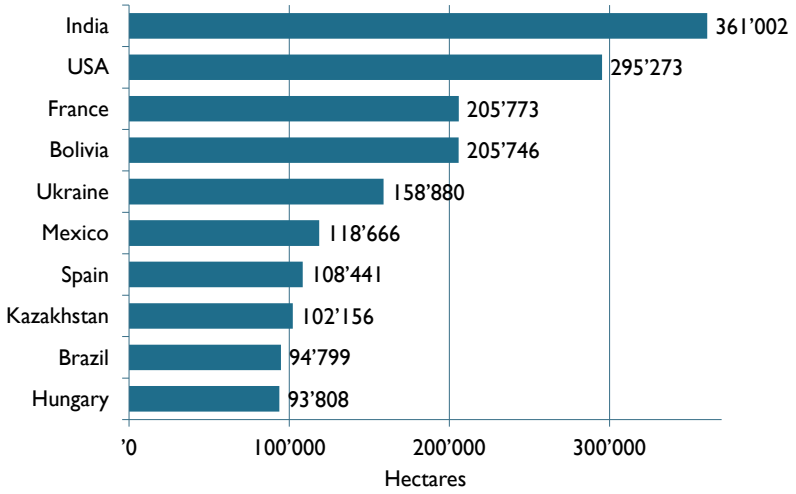


Figure 7: World: The ten countries with the highest increase of organic agricultural land 2019

Source: FiBL survey 2021, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 317

Table 7: World: Development of organic agricultural land by country 2018-2019

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 317). On statistics.fibl.org data back to 2000 is available.[1]

Country	Organic agri. land 2018 [ha]	Organic agri. land 2019 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
Afghanistan	786	786	0	0.0%	725	1182.4%
Albania	747	653	-94	-12.5%	369	129.9%
Algeria	772	772	0	0.0%	149	23.9%
Andorra	2	2	0	0.0%	0	0.0%
Argentina	3'629'968	3'672'350	42'382	1.2%	-502'124	-12.0%
Armenia	694	594	-99	-14.3%	-156	-20.7%
Australia	35'687'799	35'687'799	0	0.0%	23'686'075	197.4%
Austria	637'805	669'921	32'116	5.0%	101'728	17.9%
Azerbaijan	37'630	37'630	0	0.0%	16'284	76.3%
Bahamas	49	49	0	0.0%	49	
Bangladesh	2'249	2'249	0	0.0%	1'450	181.5%
Belarus	1'361	1'375	14	1.0%	1'375	
Belgium	89'025	93'119	4'094	4.6%	33'899	57.2%
Belize	220	77	-143	-65.0%	-399	-83.9%
Benin	16'454	15'164	-1'289	-7.8%	13'997	1198.9%

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

Country	Organic agri. land 2018 [ha]	Organic agri. land 2019 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
Bhutan	6'632	6'632	0	0.0%	6'632	
Bolivia (Plurinational State of)	114'306	144'231	29'925	26.2%	32'123	28.7%
Bosnia and Herzegovina	896	1'692	796	88.8%	1'112	191.7%
Brazil	1'188'255	1'283'054	94'799	8.0%	350'934	37.6%
Bulgaria	128'853	117'779	-11'074	-8.6%	92'131	359.2%
Burkina Faso	56'663	87'490	30'827	54.4%	73'688	533.9%
Burundi	81	84	3	3.3%	-266	-76.1%
Cambodia	27'550	25'757	-1'793	-6.5%	17'673	218.6%
Cameroon	1'089	204	-885	-81.3%	-292	-59.0%
Canada	1'311'572	1'321'072	9'501	0.7%	617'394	87.7%
Cape Verde	495	495	0	0.1%	495	
Chad		1'113	1'113		1'113	
Channel Islands	180	180	0	0.0%	-180	-50.0%
Chile	16'305	20'897	4'592	28.2%	-10'800	-34.1%
China	3'135'000	2'216'000	-919'000	-29.3%	1'126'000	103.3%
Colombia	22'314	30'447	8'133	36.4%	-2'887	-8.7%
Comoros	2'142	1'164	-978	-45.6%	119	11.4%
Cook Islands	24	15	-9	-35.5%	-2	-13.5%
Costa Rica	8'964	8'832	-132	-1.5%	-2'282	-20.5%
Côte d'Ivoire	50'574	66'728	16'154	31.9%	48'594	268.0%
Croatia	103'166	108'127	4'961	4.8%	84'775	363.0%
Cuba	6'181	2'373	-3'808	-61.6%	267	12.7%
Cyprus	6'022	6'240	218	3.6%	2'665	74.5%
Czech Republic	538'894	540'986	2'093	0.4%	92'784	20.7%
Democratic Republic of the Congo	60'624	88'727	28'103	46.4%	56'204	172.8%
Denmark	256'711	285'526	28'815	11.2%	122'623	75.3%
Dominica	240	240	0	0.0%	240	
Dominican Republic	169'026	134'375	-34'651	-20.5%	-30'734	-18.6%
Ecuador	41'793	47'836	6'043	14.5%	-16'915	-26.1%
Egypt	116'000	116'000	0	0.0%	33'833	41.2%
El Salvador	1'679	1'708	29	1.7%	-5'029	-74.6%
Estonia	206'590	220'737	14'147	6.8%	107'765	95.4%
Eswatini	186	843	657	353.7%	837	14427.2%
Ethiopia	197'503	221'189	23'686	12.0%	83'993	61.2%
Falkland Islands (Malvinas)	31'937	31'937	0	0.0%	-366'869	-92.0%
Faroe Islands	251	251	0	0.0%	-2	-0.7%
Fiji	41'154	22'612	-18'542	-45.1%	22'512	22511.8%
Finland	297'442	306'484	9'042	3.0%	137'316	81.2%
France	2'035'024	2'240'797	205'773	10.1%	1'395'355	165.0%
French Guiana (France)	3'103	3'667	564	18.2%	1'891	106.5%
French Polynesia	1'512	1'562	49	3.3%	-165	-9.6%
Gambia	20	68	48	243.5%	68	
Georgia	1'452	1'452	0	0.0%	51	3.6%
Germany	1'521'314	1'613'785	92'471	6.1%	623'083	62.9%
Ghana	29'663	31'199	1'536	5.2%	18'564	146.9%
Greece	492'627	528'752	36'125	7.3%	218'929	70.7%
Grenada	84	84	0	0.0%	-1	-1.7%
Guadeloupe (France)	272	492	220	80.9%	465	1722.2%
Guatemala	14'000	88'178	74'178	529.8%	74'803	559.3%
Guinea	10	1'000	990	9900.0%	1'000	
Guinea-Bissau	835	781	-53	-6.4%	781	
Guyana			0		-4'249	-100.0%
Haiti	4'403	3'333	-1'070	-24.3%	3'199	2378.9%
Honduras	29'274	29'274	0	0.0%	11'449	64.2%
Hungary	209'382	303'190	93'808	44.8%	175'585	+137.0%
Iceland	24'855	5'740	-19'115	-76.9%	-66	-1.1%
India	1'938'221	2'299'222	361'002	18.6%	1'519'222	194.8%

Country	Organic agri. land 2018 [ha]	Organic agri. land 2019 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
Indonesia	251'631	251'619	-12	0.0%	180'505	253.8%
Iran (Islamic Republic of)	11'916	11'916	0	0.0%	4'660	64.2%
Iraq	63	63	0	0.0%	63	
Ireland	118'699	73'952	-44'747	-37.7%	26'088	54.5%
Israel	6'666	6'307	-359	-5.4%	-2'487	-28.3%
Italy	1'958'045	1'993'225	35'180	1.8%	879'483	79.0%
Jamaica	374	374	0	0.0%	-168	-31.0%
Japan	10'792	10'792	0	0.0%	1'725	19.0%
Jordan	1'446	1'446	0	0.0%	-23	-1.5%
Kazakhstan	192'134	294'289	102'156	53.2%	160'727	120.3%
Kenya	154'488	154'488	0	0.0%	149'646	3090.4%
Kiribati	1'600		-1'600	-100.0%	0	
Kosovo	160	1'036	876	547.5%	1'036	
Kuwait	22	33	11	51.2%	33	
Kyrgyzstan	36'749	19'054	-17'695	-48.2%	4'014	26.7%
Lao People's Democratic Republic	7'668	8'952	1'284	16.7%	2'946	49.1%
Latvia	280'383	289'796	9'413	3.4%	123'476	74.2%
Lebanon	1'241	1'574	333	26.8%	347	28.3%
Lesotho	1		-1	-100.0%	0	
Liberia	2	2	0	0.0%	2	
Liechtenstein	1'413	1'470	57	4.0%	450	44.1%
Lithuania	239'691	242'118	2'427	1.0%	98'474	68.6%
Luxembourg	5'782	5'814	32	0.6%	2'094	
Madagascar	48'757	76'530	27'773	57.0%	56'242	277.2%
Malawi	12'399	12'294	-105	-0.8%	11'471	1392.6%
Malaysia	9'576	1'276	-8'300	-86.7%	-305	-19.3%
Mali	12'655	11'300	-1'355	-10.7%	-3'899	-25.7%
Malta	47	55	8	16.5%	31	129.2%
Martinique (France)	398	613	215	54.0%	422	220.9%
Mauritius	3	6	3	132.0%	-29	-83.3%
Mayotte	35	41	6	17.1%	41	
Mexico	183'225	301'891	118'666	64.8%	-30'594	-9.2%
Moldova	17'151	27'833	10'682	62.3%	-4'272	-13.3%
Mongolia	636	61	-574	-90.4%	61	
Montenegro	4'455	4'751	297	6.7%	1'190	33.4%
Morocco	9'917	9'917	0	0.0%	-7'113	-41.8%
Mozambique	14'933	7'762	-7'172	-48.0%	2'243	40.6%
Myanmar	12'305	12'948	643	5.2%	12'889	21520.4%
Namibia	66	112	46	69.7%	-12	-9.7%
Nepal	9'361	9'361	0	0.0%	-429	-4.4%
Netherlands	63'809	68'068	4'259	6.7%	21'835	47.2%
New Caledonia	94	800	706	751.1%	800	
New Zealand	88'871	88'871	0	0.0%	-35'593	-28.6%
Nicaragua	34'787	42'952	8'165	23.5%	9'330	27.8%
Niger	254	254	0	0.0%	206	428.3%
Nigeria	54'590	55'047	457	0.8%	43'069	359.5%
Niue	43	43	0	0.0%	-116	-72.8%
North Macedonia	4'409	3'711	-698	-15.8%	-31'453	-89.4%
Norway	46'377	45'312	-1'065	-2.3%	-11'907	-20.8%
Oman	43	43	0	0.0%	3	8.6%
Pakistan	64'885	64'885	0	0.0%	42'782	193.6%
Palestine	4'870	5'388	518	10.6%	-966	-15.2%
Panama	5'929	5'929	0	0.0%	2'687	82.9%
Papua New Guinea	49'573	24'696	-24'878	-50.2%	21'540	682.5%
Paraguay	42'818	57'566	14'748	34.4%	6'376	12.5%
Peru	311'461	235'592	-75'869	-24.4%	18'836	8.7%
Philippines	218'570	168'352	-50'218	-23.0%	88'360	110.5%
Poland	484'676	507'637	22'961	4.7%	-14'333	-2.7%

Country	Organic agri. land 2018 [ha]	Organic agri. land 2019 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
Portugal	213'118	293'213	80'095	37.6%	92'159	45.8%
Puerto Rico	14	14	0	0.0%	14	
Republic of Korea	24'700	29'711	5'011	20.3%	14'193	91.5%
Réunion (France)	1'272	1'474	202	15.9%	1'197	432.1%
Romania	326'260	395'228	68'968	21.1%	212'522	116.3%
Russian Federation	606'975	674'370	67'395	11.1%	630'353	1432.1%
Rwanda	2'130	1'265	-865	-40.6%	-2'335	-64.9%
Samoa	97'656	41'083	-56'573	-57.9%	31'369	322.9%
São Tomé and Príncipe	10'934	10'934	0	0.0%	6'524	147.9%
Saudi Arabia	18'631	24'517	5'886	31.6%	-17'859	-42.1%
Senegal	7'989	6'486	-1'504	-18.8%	-21'689	-77.0%
Serbia	19'255	21'266	2'011	10.4%	12'631	146.3%
Sierra Leone	99'238	157'531	58'293	58.7%	92'279	141.4%
Singapore	3	15	12	461.5%	15	
Slovakia	188'986	197'565	8'579	4.5%	23'094	13.2%
Slovenia	47'848	49'638	1'790	3.7%	18'942	61.7%
Solomon Islands	4'714	4'086	-628	-13.3%	2'780	212.9%
South Africa	23'278	30'214	6'936	29.8%	-25'406	-45.7%
Spain	2'246'475	2'354'916	108'441	4.8%	898'244	61.7%
Sri Lanka	77'169	70'436	-6'733	-8.7%	48'177	216.4%
Sudan	76'941	73'903	-3'038	-3.9%	20'301	37.9%
Suriname	94	109	16	16.6%	98	891.4%
Sweden	608'758	613'964	5'206	0.9%	175'271	40.0%
Switzerland	160'992	172'713	11'721	7.3%	61'199	54.9%
Syrian Arab Republic	19'987	19'987	0	0.0%	0	0.0%
Taiwan	8'759	9'536	777	8.9%	6'575	222.0%
Tajikistan	8'806	10'340	1'534	17.4%	9'949	2546.3%
Tanzania' United Republic of	278'467	278'467	0	0.0%	205'802	283.2%
Thailand	95'066	188'451	93'385	98.2%	154'372	453.0%
Timor-Leste	63'882	32'472	-31'410	-49.2%	7'722	31.2%
Togo	41'323	38'506	-2'817	-6.8%	35'097	1029.5%
Tonga	685	1'119	434	63.4%	1'119	
Tunisia	286'623	286'623	0	0.0%	111'557	63.7%
Turkey	646'247	518'435	-127'812	-19.8%	134'653	35.1%
Uganda	183'598	183'598	0	0.0%	-44'821	-19.6%
Ukraine	309'100	467'980	158'880	51.4%	197'754	73.2%
United Arab Emirates	4'687	4'642	-45	-0.9%	4'282	1189.6%
United Kingdom	457'377	459'275	1'898	0.4%	-240'363	-34.4%
United States of America	2'031'277	2'326'551	295'273	14.5%	557'550	31.5%
United States Virgin Islands	26	26	0	0.0%	26	
Uruguay	2'147'083	2'143'640	-3'443	-0.2%	1'212'675	130.3%
Uzbekistan	943	932	-11	-1.2%	867	1333.2%
Vanuatu	25'648	8'368	-17'280	-67.4%	5'680	211.3%
Viet Nam	51'359	61'901	10'542	20.5%	42'629	221.2%
Zambia	1'228	207	-1'021	-83.2%	-3'395	-94.3%
Zimbabwe	415	848	433	104.3%	-1'147	-57.5%
World*	**71'172'783**	**72'285'656**	**1'112'873**	**1.6%**	**36'571'729**	**102.4%**

Source: FiBL survey 2021, 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 317
**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 35.0 million hectares, and all the organic areas together summed up to 107.4 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 (Table 22: Number of organic beehives by country 2019, Table 24: Organic aquaculture: Production volume by country 2019). While some area data on aquaculture are available, it should be noted that it is not complete.

For more information on aquaculture and beekeeping, see pages 87 and 84. More information on the use of the wild collection areas is available in the corresponding chapter, page 79.

Distribution of all organic areas in 2019
Source: FiBL survey 2021

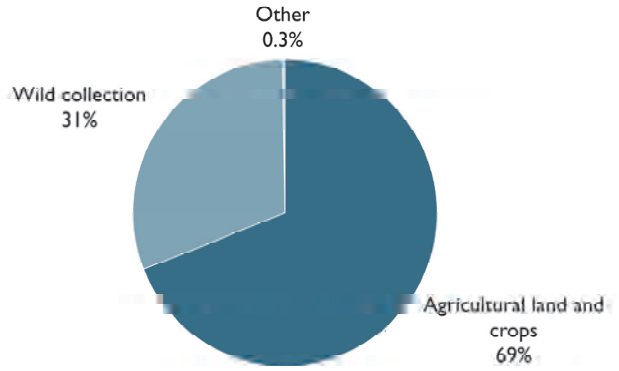


Figure 8: World: Distribution of all organic areas 2019. Total: 107.4 million hectares

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Table 8: World: Organic areas: Agricultural land (including conversion areas) and further organic areas by region in 2019

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	2'030'830		50'295	22'595	16'341'099	3'028	18'447'847
Asia	5'911'622	106'195	123	20'000	3'222'620	5'156	9'265'716
Europe	16'528'677		19'563		10'613'341		27'162'684
Latin America	8'292'138	568	40'007	2'750	4'593'699	23'090	12'952'253
Northern America	3'647'623				24'119		3'671'742
Oceania	35'881'053				112		35'881'165
World**	**72'285'656**	**106'762**	**109'988**	**45'345**	**34'794'989**	**31'275**	**107'375'118**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317; Blank cells: No data available.
**Wild collection and beekeeping areas; **Total includes correction value for French overseas departments.*

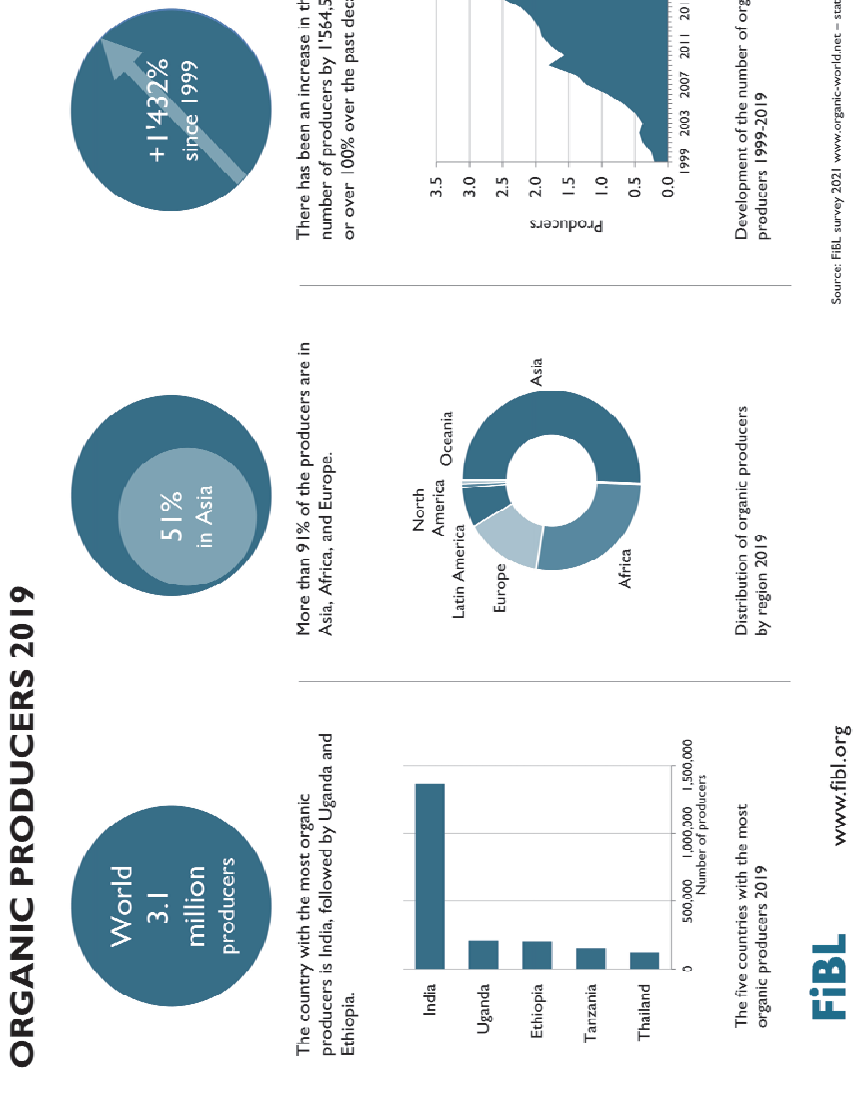
Table 9: World: Organic areas: Agricultural land (including conversion areas) and further organic areas by country 2019

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	653				645'042		645'695
Algeria	772				628		1'400
Andorra	2						2
Argentina	3'672'350				20'900		3'693'250
Armenia	594				8'570		9'164
Australia	35'687'799						35'687'799
Austria	669'921						669'921
Azerbaijan	37'630	123	123		1'063		38'939
Bahamas	49						49
Bangladesh	2'249	5'781					8'030
Belarus	1'375		2		946'897		948'273
Belgium	93'119				3		93'121
Belize	77						77
Benin	15'164						15'164
Bhutan	6'632				7'746		14'378
Bolivia (Plurinational State of)	144'231				1'455'835		1'600'066
Bosnia and Herzegovina	1'692				11'579		13'271
Botswana					2		2
Brazil	1'283'054				1'701'438		2'984'492
Bulgaria	117'779				307'020		424'799
Burkina Faso	87'490				265'582		353'072
Burundi	84						84
Cambodia	25'757						25'757
Cameroon	204				112'000		112'204
Canada	1'321'072				24'119		1'345'191
Cape Verde	495						495
Chad	1'113				5'800		6'913
Channel Islands	180						180
Chile	20'897	489			93'079		114'465
China	2'216'000				1'549'800		3'765'800
Colombia	30'447				7'320	23'090	60'858
Comoros	1'164						1'164
Cook Islands	15						15
Costa Rica	8'832						8'832
Côte d'Ivoire	66'728						66'728
Croatia	108'127						108'127
Cuba	2'373						2'373
Cyprus	6'240						6'240
Czech Republic	540'986						540'986

Country	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non-agri. land [ha]	Wild collection [ha]*	Other non-agri. land [ha]	Total [ha]
Democratic Republic of the Congo	88'727						88'727
Denmark	285'526				2'648		288'174
Dominica	240						240
Dominican Republic	134'375						134'375
Ecuador	47'836	79	40'007		1'000		88'921
Egypt	116'000						116'000
El Salvador	1'708						1'708
Estonia	220'737				104'305		325'042
Eswatini	843				564		1'406
Ethiopia	221'189				7'629		228'818
Falkland Islands (Malvinas)	31'937						31'937
Faroe Islands	251				0		251
Fiji	22'612						22'612
Finland	306'484				4'600'000		4'906'484
France	2'240'797						2'241'903
French Guiana (France)	3'667						3'667
French Polynesia	1'562						1'562
Gambia	68						68
Georgia	1'452				215		1'667
Germany	1'613'785						1'613'785
Ghana	31'199				51'720		82'919
Greece	528'752				317'053		845'805
Grenada	84						84
Guadeloupe (France)	492						492
Guatemala	88'178				147'234		235'412
Guinea	1'000				1'075		2'075
Guinea-Bissau	781						781
Guyana					55'449		55'449
Haiti	3'333						3'333
Honduras	29'274						29'274
Hungary	303'190						303'190
Iceland	5'741						5'741
India	2'299'222				1'370'579		3'669'801
Indonesia	251'619				18'412		270'031
Iran (Islamic Republic of)	11'916			20'000	50'219		82'135
Iraq	63						63
Ireland	73'952						73'952
Israel	6'307				2		6'309
Italy	1'993'225						1'993'225
Jamaica	374				36		410
Japan	10'792						10'792
Jordan	1'446						1'446
Kazakhstan	294'289						294'289
Kenya	154'488				703'886		858'374
Kosovo	1'036				179'580		180'616
Kuwait	33						33
Kyrgyzstan	19'054				13'479		32'533
Lao People's Democratic Republic	8'952				17'068		26'020
Latvia	289'796						289'796
Lebanon	1'574				259		1'833
Lesotho					1'667'028		1'667'028
Liberia	2						2
Liechtenstein	1'470						1'470
Lithuania	242'118						242'118
Luxembourg	5'814						5'814
Madagascar	76'530				12'195		88'725
Malawi	12'294						12'294
Malaysia	1'276						1'276
Mali	11'300				9'254		20'554
Malta	55						55
Martinique (France)	613						612
Mauritania					2'800		2'800
Mauritius	6						6
Mayotte	41						41
Mexico	301'891				952'755		1'254'646
Moldova	27'833				1'845		29'678
Mongolia	61						61
Montenegro	4'752				143'410		148'161
Morocco	9'917				268'129		278'046
Mozambique	7'762				1'287'690		1'295'452
Myanmar	12'948	20					12'968
Namibia	112				2'609'108		2'609'220
Nepal	9'361				24'422		33'783

Country	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non-agri. land [ha]	Wild collection [ha]*	Other non-agri. land [ha]	Total [ha]
Netherlands	68'068						68'068
New Caledonia	800						800
New Zealand	88'871						88'871
Nicaragua	42'952				93		43'045
Niger	254						254
Nigeria	55'047						55'047
Niue	43				112		155
North Macedonia	3'711				556'600		560'308
Norway	45'312						45'312
Oman	43						43
Pakistan	64'885				44'620		109'505
Palestine	5'388						5'388
Panama	5'929						5'929
Papua New Guinea	24'696						24'696
Paraguay	57'565						57'565
Peru	235'592			2'750	158'560		396'902
Philippines	168'352						168'352
Poland	507'637						507'637
Portugal	293'213		19'533		40'000		352'746
Puerto Rico	14						14
Republic of Korea	29'711						29'711
Réunion (France)	1'474						1'474
Romania	395'228				1'787'548		2'182'776
Russian Federation	674'370				158'052		832'422
Rwanda	1'265				42'377		43'642
Samoa	41'083						41'083
São Tomé and Príncipe	10'934						10'934
Saudi Arabia	24'517						24'517
Senegal	6'486				41'064		47'549
Serbia	21'265						21'265
Sierra Leone	157'531						157'531
Singapore	15						15
Slovakia	197'565						197'565
Slovenia	49'638				13'238		62'876
Solomon Islands	4'086						4'086
Somalia					822'300		822'300
South Africa	30'215		887		1'778'702	3'028	1'812'833
Spain	2'354'916				38'184		2'393'100
Sri Lanka	70'436						70'436
Sudan	73'903		451		604'718		679'073
Suriname	109						109
Sweden	613'964						613'964
Switzerland	172'712						172'712
Syrian Arab Republic	19'987				8'000		27'987
Taiwan	9'536	2					9'538
Tajikistan	10'340						10'340
Tanzania' United Republic of	278'467				2'403'700		2'682'167
Thailand	188'451	269			90'716	5'156	284'592
Timor-Leste	32'472						32'472
Togo	38'506				6'470		44'976
Tonga	1'119						1'119
Tunisia	286'623		48'956	22'595	48'958		407'132
Turkey	518'435				180'336		698'771
Uganda	183'598				78'684		262'282
Ukraine	467'980		29		580'000		1'048'009
United Arab Emirates	4'642						4'642
United Kingdom	459'275						459'275
United States of America	2'326'551						2'326'551
United States Virgin Islands	26						26
Uruguay	2'143'640						2'143'640
Uzbekistan	932				5'000		5'932
Vanuatu	8'368						8'368
Viet Nam	61'901	100'000			12'450		174'351
Zambia	207				3'200'000		3'200'207
Zimbabwe	848				309'037		309'885
World**	**72'285'656**	**106'762**	**109'988**	**45'345**	**34'794'989**	**31'275**	**107'375'118**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317 ; Blank cells: No data available.
**Wild collection and beekeeping areas, **Total includes correction value for French overseas departments.*



Infographic 3: Organic producers 2019

Source: FiBL survey 2021

Organic producers and other operator types

Producers

There were more than 3.1 million organic producers worldwide. According to the data obtained, over 91 percent of the producers are in Asia, Africa, and Europe (Table 10). The country with the most organic producers is India, followed by Uganda and Ethiopia (Figure 9: World: Distribution of organic producers by region 2019 (Total: 3.1 million producers).

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 smallholders, whereas other certifiers provide data on the certificates only. This problem became particularly marked in the case of Mexico, where the data source changed in 2018, and the new source did not include the smallholder farmers, resulting in a major drop of organic producers in Mexico and Latin America as a whole. There has been an increase in the number of producers of more than 347'000, or 12.5 percent, compared to 2018. In all continents, with the exception of Latin America and Oceania, the number of producers increased.

Table 10: World: Development of the numbers of producers by region 2018 to 2019

Region	2018 [no.]	2019 [no.]	1 year growth [no.]	1 year growth [%]	10 years growth [no.]	10 years growth [%]
Africa	786'808	850'490	63'682	8.1%	315'275	58.9%
Asia	1'307'220	1'589'563	282'343	21.6%	1'127'789	244.2%
Europe	419'019	430'742	11'723	2.8%	157'419	57.6%
Latin America	227'609	224'388	-3'221	-1.4%	-44'336	-16.5%
North America	20'008	22'153	2'145	10.7%	5'234	30.9%
Oceania	20'859	18'416	-2'443	-11.7%	9'933	117.1%
World	**2'781'523**	**3'135'129**	**353'606**	**12.7%**	**1'570'832**	**100.4%**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Distribution of organic producers by region 2019
Source: FiBL survey 2021

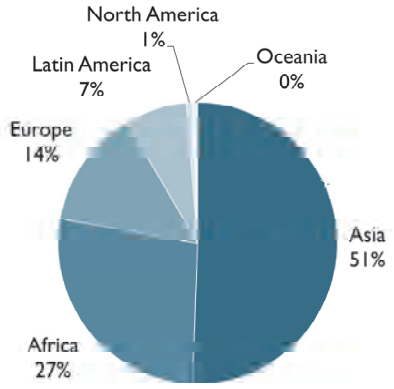


Figure 9: World: Distribution of organic producers by region 2019 (Total: 3.1 million producers)

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

The ten countries with the most organic producers 2019
Source: FiBL survey 2021

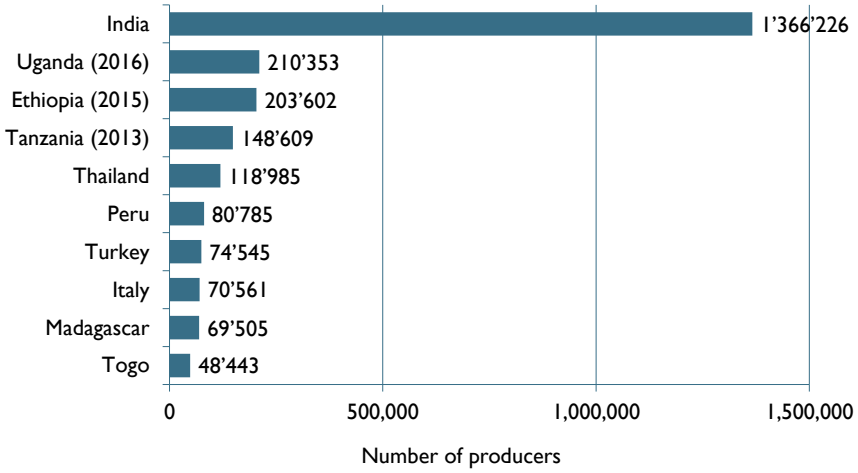


Figure 10: World: The ten countries with the largest numbers of organic producers 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Further operator types

Regarding data on further operator types, there are over 105'000 processors and approximately 7'300 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 2019

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

Country	Data year	Producers[1]	Processors	Importers	Exporters
Afghanistan	2018				5
	2019	1	1		
Albania	2019	86	8		25
Algeria	2015			1	2
	2016	64	3		
Andorra	2019		3		
Argentina	2016				99
	2019	1'269	462		
Armenia	2019	29			
Australia	2016			161	299
	2018	1'829	2'077		
Austria	2019	26'042	1'691	58	4
Azerbaijan	2015	305	50	50	
Bahamas	2016	1	1		
Bangladesh	2017	2			
	2018				1
Belarus	2018	24	24		7
	2019	7			
Belgium	2019	2'394	1'585	304	153
Belize	2018		1		1
	2019	157			
Benin	2017	4'028	24		18
	2019	1'142	1		
Bermuda	2017		1		
Bhutan	2018	4'354			2
Bolivia (Plurinational State of)	2019	14'161	7'619		233
Bosnia and Herzegovina	2018	251	23		20
	2019	86	51		
Botswana	2019	1	1		1
Brazil	2018	15	10		7
	2019	22'176	35		1
Bulgaria	2018	6'213	234	26	4
Burkina Faso	2017	19'402	96		71
	2018	2	2		
	2019	9'810	20		
Burundi	2019	25	1		1
Cambodia	2018				13

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

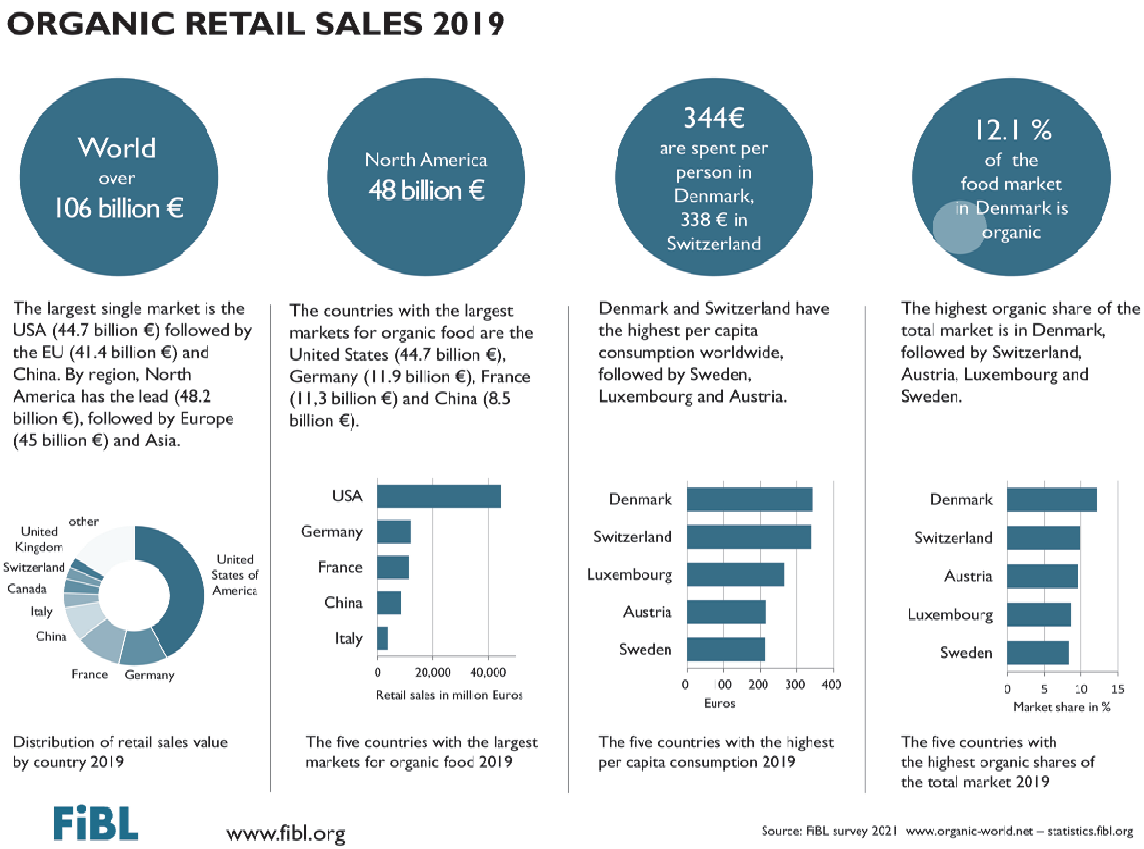
Country	Data year	Producers[1]	Processors	Importers	Exporters
	2019	6'350	57		22
Cameroon	2017	499	44		19
Canada	2019	5'677	1'710		
Cape Verde	2019	1	1		1
Chad	2017		3		3
China	2016	6'308	3'865	66	1'198
Chile	2013				88
	2019	781	202		
Colombia	2018	3'496	58		89
	2019	659	12		21
Comoros	2019	851	7		7
Cook Islands	2019	58			
Costa Rica	2019	54	42		49
Côte d'Ivoire	2017	2'770	30		25
	2019	135	17		3
Croatia	2019	5'153	395	22	3
Cuba	2018	1			1
	2019	8	4		1
Cyprus	2019	1'252	61	14	
Czech Republic	2019	4'694	802	311	163
Democratic Republic of the Congo	2019	34'613	20		17
Denmark	2015				99
	2018			94	
	2019	4'109	1'092		
Dominican Republic	2014		152		
	2019	16'311			136
Ecuador	2019	13'744	190	14	233
Egypt	2019	970	242		242
El Salvador	2019	380	10		
Estonia	2019	2'060	173	38	16
Eswatini	2019	2	2		2
Ethiopia	2015	203'602			
	2019		150		31
Falkland Islands (Malvinas)	2019	3			
Faroe Islands	2019	1	1		
Fiji	2019	13			
Finland	2019	5'129	399	63	20
France	2019	47'196	19'311	662	
French Guiana (France)	2019	84	10		
French Polynesia	2019	59			1
Gambia	2019	1			
Georgia	2014		2		
	2015	1'075			
Germany	2019	34'136	16'162	1'831	1'288
Ghana	2017	3'147	22		20
	2019	52	29		31
Greece	2019	30'124	1'642	44	52
Grenada	2018	23			
	2019		5		
Guadeloupe (France)	2019	103	10		
Guatemala	2011		23		92
	2014	6'346			
Guinea	2017		3		3
Guinea-Bissau	2019	1	1		1
Guyana	2018		1		1
Haiti	2018	4'631	1		7
	2019	2	1		1
Honduras	2009			1	25
	2017	6'023			
Hong Kong	2017		1		
Hungary	2019	5'136	523	44	

Country	Data year	Producers[1]	Processors	Importers	Exporters
Iceland	2019	26	20	2	
India	2019	1'366'226	1'667		
Indonesia	2017	17'836	120		
	2018	326	655		224
	2019		5		
Iran (Islamic Republic of)	2019	24	50		28
Ireland	2016			24	
	2017	1'725	26		2
Israel	2019	350	144	78	48
Italy	2019	70'561	21'940	527	741
Jamaica	2016	127			
	2019		4		
Japan	2018	3'678	3'361	302	
Jordan	2016				4
	2017	23	5		
Kazakhstan	2015			7	
	2017	10			
	2018	19	1		2
	2019	12	6		
Kenya	2018	37'295	22	15	32
	2019		4		
Kosovo	2019	200	35		8
Kuwait	2019	1	1	1	1
Kyrgyzstan	2019	1'051	9		6
Lao People's Democratic Republic	2011	1'342			1
	2019	823	1		
Latvia	2017	4'178	51	10	0
Lebanon	2019	122	69	5	
Lesotho	2019	3	3		1
Liberia	2019	1			
Liechtenstein	2019	47			
Lithuania	2019	2'417	124	3	
Luxembourg	2019	105	101	7	
Madagascar	2017	1'728			
	2019	67'777	196		148
Malawi	2018	1	1		1
	2019	4	4	1	4
Malaysia	2019	31	34		13
Mali	2017	12'272	13		16
Malta	2019	24	7	14	
Martinique (France)	2019	80	21		
Mauritania	2017		1		1
Mauritius	2019	19	5		5
Mayotte	2019	11			
Mexico	2018		39		24
	2019	36'587			
Moldova	2019	241	21	3	52
Monaco	2019		2		
Mongolia	2019	112	1		
Montenegro	2019	393	11		
Morocco	2016		75		
	2018	277			215
Mozambique	2018				2
	2019	149	12		10
Myanmar	2018				27
	2019	48	81		1
Namibia	2019	13	15		1
Nepal	2017	983			
	2018		6		
Netherlands	2019	1'867	1'021	462	120
New Zealand	2018	876	304	29	94

Country	Data year	Producers[1]	Processors	Importers	Exporters
Nicaragua	2009		30		
	2019	10'448			61
Niger	2017	2	1		
Nigeria	2017	310			
	2018				2
	2019	9	18		3
North Macedonia	2019	817	23	5	7
Norway	2019	1'976	428	94	
Oman	2013	4			
	2019	1			
Pakistan	2018	415	125		37
Palestine	2019	1'449	46	4	
Panama	2011		2		
	2018	18			6
Papua New Guinea	2019	12'458	5		
Paraguay	2015				23
	2019	5'122	24		
Peru	2018				80
	2019	80'785	59		
Philippines	2019	12'037	20	33	39
Poland	2019	18'655	636	238	256
Portugal	2019	5'637	933	41	34
Puerto Rico	2015		2		
	2016	5			
Republic of Korea	2016		729		
	2019	18'199			
Réunion (France)	2019	38	41		
Romania	2019	9'277	191	24	15
Russian Federation	2016		1		
	2017	6			6
	2019	51	38		8
Rwanda	2018				4
	2019	6'990	19		10
Saint Lucia	2019	1			
Samoa	2019	1'875	1		2
San Marino	2018		2		
São Tomé and Príncipe	2017	3'563	3		5
Saudi Arabia	2015				2
	2019	244			
Senegal	2013	18'369			
	2017		19		15
	2019	6	4		3
Serbia	2018	373	123	51	3
Seychelles	2019		1		1
Sierra Leone	2019	5'502	3		3
Singapore	2019		6	6	10
Slovakia	2017		85	22	1
	2018	802			
Slovenia	2019	3'823	142	27	
Solomon Islands	2019	1'127			
Somalia	2017		1		
	2019		4		4
South Africa	2019	154	193	10	113
Spain	2019	41'838	5'230	364	137
Sri Lanka	2018				312
	2019	2'338	681	3	10
Sudan	2019	5	3		2
Suriname	2018		1		1
	2019	39	2		
Sweden	2019	5'730	1'117	257	19
Switzerland	2017		1'289	548	18

Country	Data year	Producers[1]	Processors	Importers	Exporters
	2019	7'284			
Syrian Arab Republic	2009		9		
	2010	2'458			
Taiwan	2019	3'761	11		
Tajikistan	2018	949			1
Tanzania' United Republic of	2011				28
	2013	148'607			
	2019	2	2		
Thailand	2018				2
	2019	118'985	214		
Timor-Leste	2018				4
	2019	4	16		
Togo	2017	19'708	42		31
	2018	1'770			
	2019	26'965	1		
Tonga	2019	81	1		1
Trinidad and Tobago	2019		4		
Tunisia	2018	7'456	330	12	149
Turkey	2019	74'545	1'356	58	209
Uganda	2016	210'352			
	2019	1	66		19
Ukraine	2018	470	20		18
United Arab Emirates	2017	95			
	2019	7	5	8	10
United Kingdom	2019	3'581	2'566	216	
United States of America	2019	16'476			
United States Virgin Islands	2017		1		
Uruguay	2018		21		6
	2019	748	1		10
Uzbekistan	2018	1			
	2019	1			
Vanuatu	2019	40			
Venezuela (Bolivarian Republic of)	2018		1		1
Viet Nam	2018		555	40	60
	2019	17'174			
Zambia	2019	5	5		5
Zimbabwe	2019	8	8		6
World*		**3'135'129**	**109'250**	**7'355**	**8'640**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317
Blank cells: No data available.
**Total number includes data for countries with less than three operators.*



Infographic 4: Organic retail sales 2019

Source: FiBL survey 2021

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 136), 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 57 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 over 106 billion euros in 2019. The country with the largest market for organic food was the United States (44.7 billion euros), followed by Germany (12.0 billion euros), France (11.3 billion euros) and China (8.5 billion euros). The largest single market was the United States, followed by the European Union (41.4 billion euros) and China (Figure 84). By region, North America had the lead (48.2 billion euros), followed by Europe (45.0 billion euros) and Asia (Table 12).

Market growth was noted in all countries for which 2019 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 13.4 percent. Whereas the highest per capita consumption by continent is in North America (132 euros), by country it is highest in European countries. In 2019, Denmark had the highest per capita consumption (344 euros) worldwide, followed by Switzerland (338 euros), Luxembourg (265 euros) and Austria (216 euros) (Table 13).

Looking at the shares the organic market has of the total market, the leader is Denmark (12.1 percent), followed by Switzerland (10.4 percent), Austria (9.3 percent), Sweden (9 percent) and Luxembourg (8.6 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 140. 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 2019

Region	Retail sales [Million €][1]	Per capita consumption [€]
Africa*	17	0.01
Asia	10'949	2.4
Europe	45'049	55.8
Latin America**	810	1.5
North America	48'201	132.3
Oceania	1'378	33.5
World	**106'404**	**14.0**

Source: FiBL-AMI survey 2021, based on data from government bodies, the private sector, and market research companies. For data sources, see annex, page 317.
** 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 2019
Figure 12: Global market for organic food: Distribution of retail sales by region 2019

Source: FiBL-AMI survey 2021, based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 317

[1] According to the Central European Bank, 1 euro corresponded to 1.1195 US dollars in 2019.

The ten countries with the largest markets for organic food
2019
Source: FiBL-AMI survey 2021

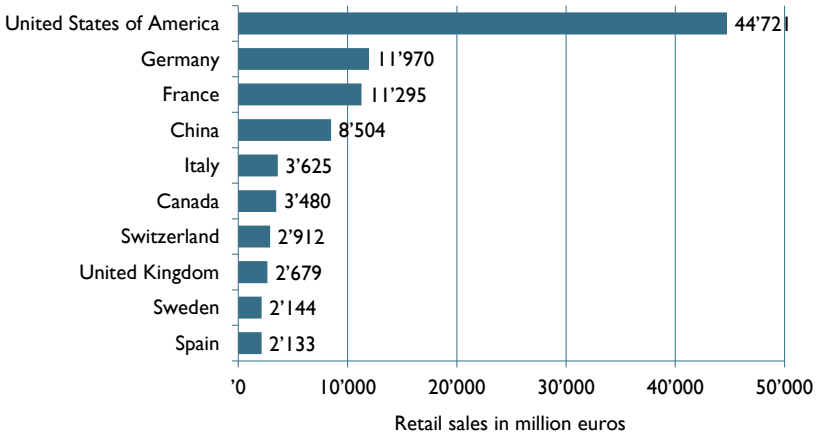


Figure 13: Global market: The countries with the largest markets for organic food 2019

Source: FiBL-AMI survey 2021, based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 317

The ten countries with the highest per capita consumption
2019
Source: FiBL-AMI survey 2021

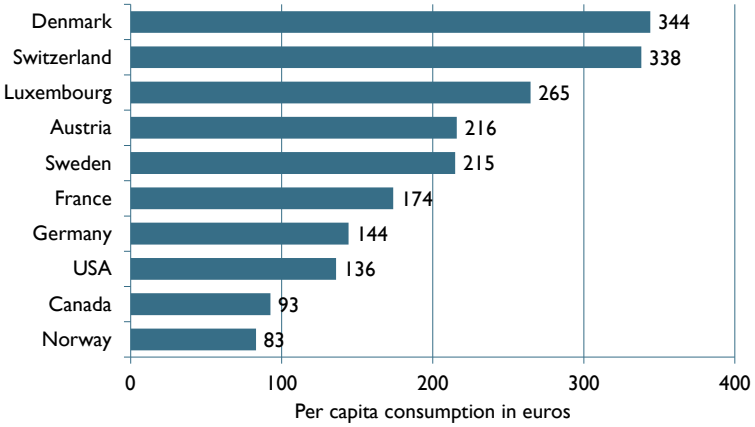


Figure 14: Global market: The ten countries with the highest per capita consumption 2019

Source: FiBL-AMI survey 2021, based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 317

Table 13: Global market data: Retail sales, organic share of all retail sales, per capita consumption, and exports by country 2019

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	2019	1'920	9.3	216	
Azerbaijan	2011	3		0	
Belgium	2019	779	3.1	68	
Belize	2015	0		0	0
Bhutan	2018	0	0.3	0	0
Bolivia (Plurinational State of)	2011				179
Bosnia and Herzegovina	2017	0		0	
	2018				6
Brazil	2016	778		4	126
Bulgaria	2018	30			
	2019		0.4	4	
Canada	2019	3'480	3.2	93	310
Chile	2009	2		0	
	2019				245
China	2019	8'504		6	
Colombia	2007				13
Costa Rica	2008	1		0	
	2009				19
Croatia	2011				3
	2018	99	2.2	24	
Cyprus	2006	2	0.1	2	
Czech Republic	2018	164	1.6	16	83
Denmark	2019	1'979	12.1	344	406
Dominican Republic	2018				423
Estonia	2019	62	3.7	47	27
Ethiopia	2015	13		0	181
Finland	2019	368	2.6	67	28
France	2019	11'295	6.1	174	826
Germany	2019	11'970	5.7	144	
Greece	2017	66	0.3	6	
Hungary	2009				20
	2015	30	0.3	3	
India	2018	186		0.2	613
Ireland	2017	206	2.5	43	
Italy	2019	3'625	3.7	60	2'425
Jamaica	2016	1		0	
Japan	2017		1.4		
	2018	1'419		11	
Kazakhstan	2015				9
Kenya	2016				24
	2018	4		0	
Kosovo	2015				6
Kyrgyzstan	2019				288
Latvia	2017	51	1.5	6	51
Lithuania	2017	51	1.0	18	45
Luxembourg	2019	160	8.6	265	
Mexico	2013	14		0	373

[1] According to the Central European Bank, 1 euro corresponded to 1.1195 US dollars in 2019.

Netherlands	2016				1'200
	2019	1'211	4.9	71	
New Zealand	2017	155	2.2	33	224
Norway	2016		1.7		
	2019	442		83	
Peru	2010	14		0	
	2019				338
Poland	2019	314	0.6	8	
Portugal	2011	21	0.2	2	
Republic of Korea	2019	357		6.5	8
Romania	2011				200
	2016	41	0.2	2	
Russian Federation	2009				4
Saudi Arabia	2018	296		8	
Serbia	2016				19
Singapore	2017	16		3	
Slovakia	2010	4	0.2	1	
Slovenia	2009				0
	2013	49	1.8	27	
Spain	2016				891
	2017		2.8		
	2018	2'133		47	
Sri Lanka	2015				259
Sweden	2018				117
	2019	2'144	9.0	215	
Switzerland	2019	2'912	10.4	338	
Thailand	2014	12		0	28
Tunisia	2018				224
Turkey	2014	46		1	
	2017				182
Uganda	2015				50
Ukraine	2019	36		1	168
United Kingdom	2016				194
	2019	2'679	1.8	40	
USA	2016				2'981
	2018			136	
	2019	44'721	5.8		
Viet Nam	2018		0.2		
	2019	157		2	502
World		**106'404**		**14.0**	

Source: FiBL-AMI survey 2021, based on data from government bodies, the private sector, and market research companies. For data sources see annex, page 317
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 the DAC are studied in this section.

More than 2.7 million organic producers from the countries on the DAC list[1] were counted (87 percent of all organic producers). More than a fifth of the world's organic agricultural land, 15.1 million hectares, is located in countries listed on the DAC list.

If wild collection and beekeeping areas are included, the total area is 41.5 million hectares. Almost half of the agricultural land of the countries on the DAC list is located in Latin American countries (almost 6.1 million hectares), with Asia (5.8 million) and Africa (2.0 million) in second and third place. The countries with the largest areas of organic agricultural land are Argentina, India, China and Brazil, in that order. Not surprisingly, all 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 São Tomé and Príncipe (24.9 percent), Samoa (14.5 percent) and Timor-Leste (8.5 percent). Argentina, with by far the largest area under organic cultivation (with 3.7 million hectares), is ranked thirteenth 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 18 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 arable land areas constitute over 29 percent of the organic agricultural land, organic grassland/grazing over 25 percent, and organic permanent crops almost 20 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.

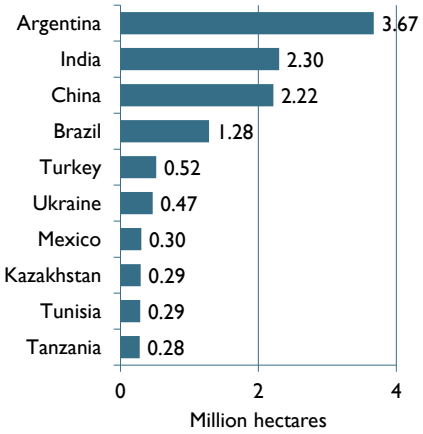
[1] The country list of the Development Assistance Committee DAC is available on the OECD website at http://www.oecd.org/dac/stats/daclist.htm

Table 14: Countries on the DAC list[1]: Development of organic agricultural land 2014-2019

Region	2014	2015	2016	2017	2018	2019
Africa	1'252'674	1'685'509	1'711'656	1'917'717	1'842'166	2'029'315
Asia	3'432'816	3'765'408	4'809'139	5'935'403	6'517'479	5'826'027
Europe	931'955	947'430	957'978	861'048	1'002'419	1'047'354
Latin America	5'097'592	5'422'748	5'667'297	6'058'204	5'809'394	6'090'804
Oceania	85'149	73'792	113'154	158'846	221'073	102'006
Total	**10'800'185**	**11'894'888**	**13'259'224**	**14'931'218**	**15'392'531**	**15'095'506**

Source: FiBL surveys 2016-2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

The ten countries on the DAC list with the largest areas of organic agricultural land 2019
Source: FiBL survey 2021



The ten countries on the DAC list with the highest organic shares of the total agricultural land 2019
Source: FiBL survey 2021

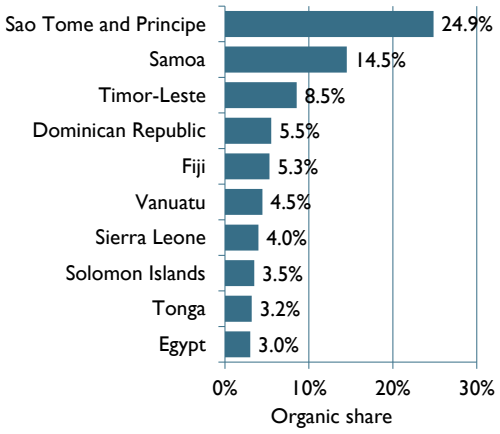


Figure 15 (left): Countries on the DAC list: The ten countries with the largest areas of organic agricultural land in 2019

Figure 16 (right): Countries on the DAC list: The ten countries with the highest organic shares of the total agricultural land in 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

[1] The development is displayed for all countries, which are on the 2019 DAC list. The data is not comparable to those previously published, as there were changes in the list.

Land use and key commodities in organic agriculture

Land use

Over two-thirds of the 72.3 million hectares of organic agricultural land in 2019 were grassland/grazing areas (almost 48.9 million hectares). The cropland area (arable land with 13.1 million hectares and permanent crops with 4.7 million hectares) constituted 17.8 million hectares, and about 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 91 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, cocoa and olives; among the main arable crops are oilseeds (sesame, and soybeans) and cotton. For land use details in Africa, see page 189.
- 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 208.
- 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 (48 percent) is mainly used for the cultivation of cereals and by green fodder (almost 3 million hectares and

[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

almost 2.6 million hectares respectively). Permanent crops account for almost 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 228).

- Latin America and the Caribbean: Almost three-quarters of the total organic agricultural land in Latin America is permanent grassland. Permanent crops account for almost 8 percent of the total organic agricultural area. 40 percent 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 218.
- North America: Arable land and permanent grassland/grazing areas are contributing the majority of the total organic agricultural land, 36 respectively 46 percent. 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 284.
- 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 298.

Distribution of main land use types by region 2019
Source: FiBL survey 2021

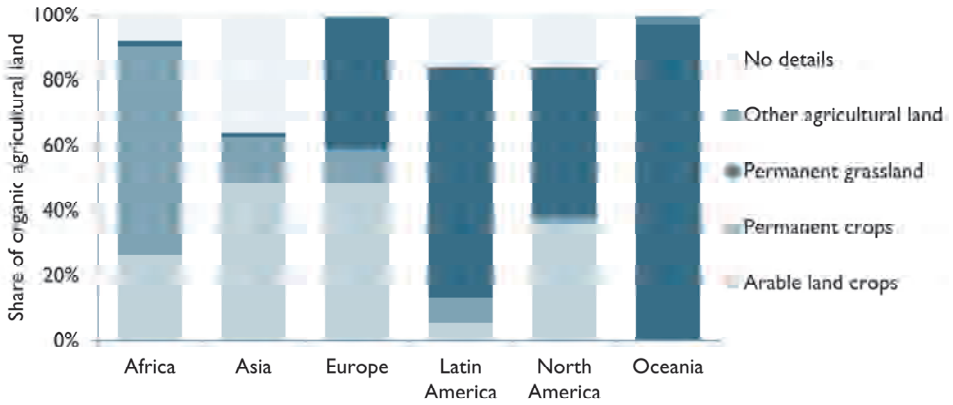


Figure 17: World: Distribution of main land use types by region 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

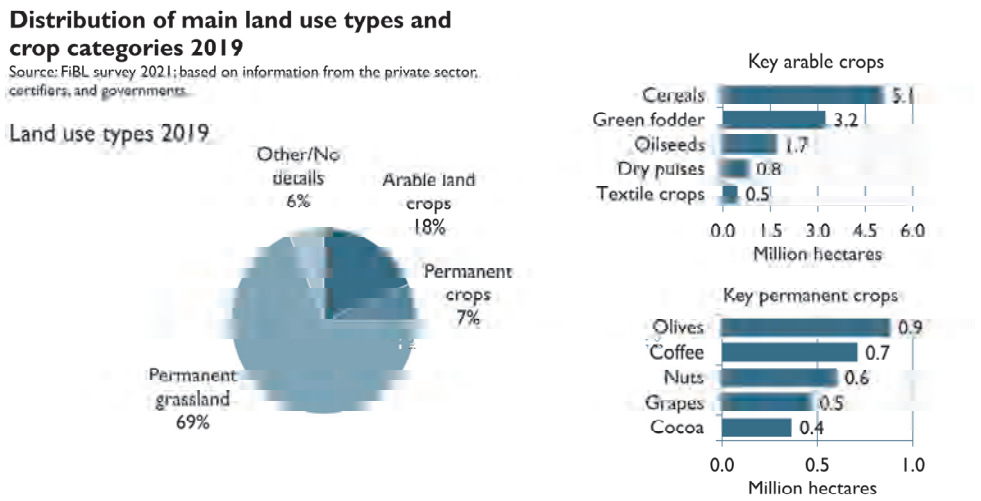


Figure 18: World: Distribution of main land use types and key crop categories 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

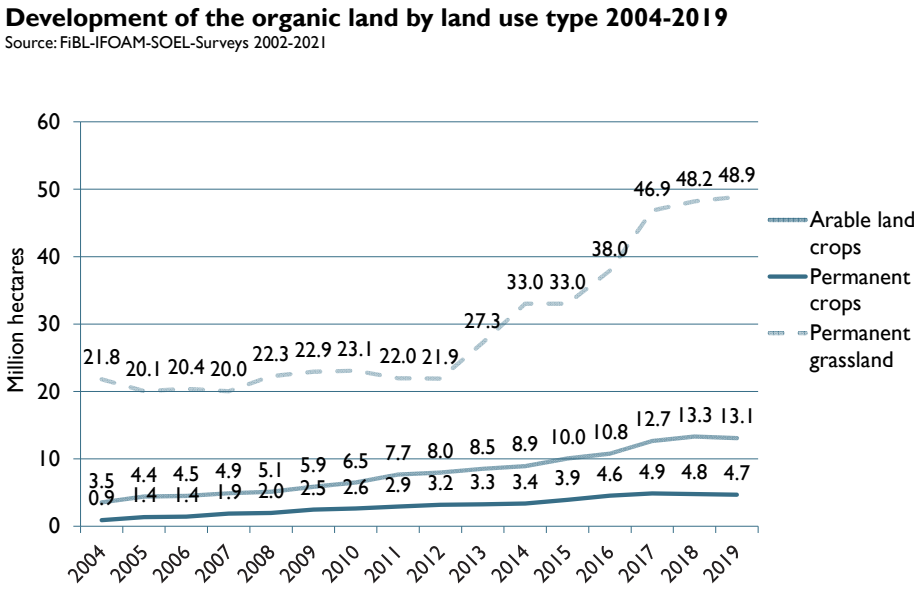


Figure 19: World: Development of organic arable land, permanent cropland and permanent grassland/grazing areas 2004-2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Table 15: World: Land use in organic agriculture by region (including in-conversion areas) 2019

Land use	Africa [ha]	Asia [ha]	Europe [ha]	Latin America [ha]	North America [ha]	Oceania [ha]	World [ha]
Arable crops	535'953	2'906'354	7'855'566	440'691	1'311'899	45'334	13'095'796
Permanent crops	1'299'865	795'381	1'768'061	643'129	84'464	102'797	4'693'697
Permanent grassland	26'968	64'815	6'535'444	5'889'601	1'669'772	34'681'443	48'868'043
Total*	**2'030'830**	**5'911'622**	**16'528'677**	**8'292'138**	**3'647'623**	**35'881'053**	**72'285'656**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Table 16: World: Land use and crop categories in organic agriculture worldwide 2019

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		**3'811'294**
Arable crops	Arable crops, no details	61'891
	Arable crops, other	265'955
	Cereals	5'073'137
	Dry pulses and protein crops	806'862
	Fallow land, crop rotation	519'575
	Flowers and ornamental plants	12'633
	Fresh vegetables and melons	433'165
	Green fodder from arable land	3'238'540
	Hops	434
	Industrial crops	16'169
	Medicinal and aromatic plants	320'385
	Mushrooms and truffles	12'569
	Oilseeds	1'676'502
	Root crops	101'674
	Seeds and seedlings	134
	Strawberries	7'253
	Sugarcane	88'585
	Textile crops	459'607
	Tobacco	725
Arable crops total		***13'095'796***
Permanent crops	Berries	74'672
	Citrus fruit	102'897
	Cocoa	363'706
	Coconut	300'960
	Coffee	709'118
	Flowers and ornamental plants, permanent	23
	Fruit	29'173
	Fruit of temperate climate zones	308'543
	Fruit, tropical and subtropical	237'026
	Fruit/nuts/berries	4'027
	Grapes	467'760
	Medicinal and aromatic plants, permanent	97'679
	Nurseries	777
	Nuts	600'328
	Olives	881'543
	Permanent crops, other	332'856
	Tea/mate, etc.	182'609
Permanent crops total		***4'693'697***
Permanent grassland		**48'868'043**
World*		**72'285'656**

*Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317. *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 million hectares, organic arable land constitutes 18 percent of the world's organic agricultural land and 1 percent of the world's arable cropland.

The reported 1.7 percent decrease compared to 2018 was mainly due to a loss of 663'000 hectares of temporary grassland in China. This loss hides the actual growth in major crop groups like cereals, oilseeds, dry pulses and vegetables.

Around 60 percent of the arable land is located in Europe, followed by Asia (22 percent), and North America (10 percent) (Figure 20). Most of the arable cropland is used for cereals including rice (5.1 million hectares), green fodder (3.2 million hectares), and oilseeds (1.7 million hectares) (Figure 21 and Table 17).

Table 17: Use of organic arable land (including in-conversion areas), 2018 and 2019 compared

Crop group	2018 [ha]	2019 [ha]	Change 2018-2019 [ha]	Organic share [%]
Cereals	4'763'398	5'073'137	309'738	0.70
Dry pulses	734'293	806'862	72'569	0.84
Flowers and ornamental plants	586	12'633	12'047	0.00
Green fodder from arable land	3'802'355	3'238'540	-563'815	7.12
Hops	713	434	-279	0.46
Industrial crops	9'997	16'169	6'172	15.16
Medicinal and aromatic plants	280'628	320'385	39'757	17.44
Mushrooms and truffles	16'605	12'569	-4'036	17.18
Oilseeds	1'493'941	1'676'502	182'561	0.70
Root crops	113'062	101'674	-11'388	0.15
Strawberries	7'470	7'253	-217	1.94
Sugarcane	94'811	88'585	-6'226	0.34
Textile crops	472'725	459'607	-13'118	1.30
Tobacco	5'013	725	-4'288	0.02
Vegetables	387'754	433'165	45'411	0.69
World*	**13'318'218**	**13'095'796**	**-222'421**	**1.00**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317
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.*

Distribution of organic arable cropland by region 2019
Source: FiBL survey 2021

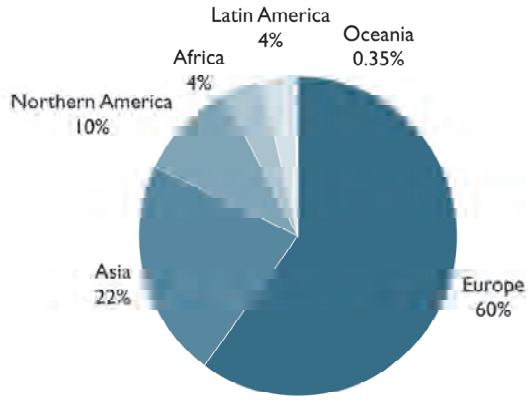


Figure 20: World: Distribution of organic arable cropland by region 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Use of organic arable cropland by crop group 2019
Source: FiBL survey 2021

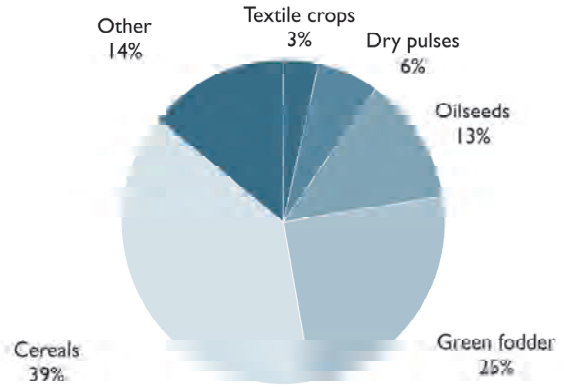


Figure 21: World: Use of arable cropland by crop group 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Permanent crops

Permanent crops accounted for almost 4.7 million hectares, which is 2.8 percent of the world's permanent cropland. Compared with 2018, an increase of more than 17'000 hectares, or 0.4 percent, 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 (almost 1.8 million hectares), followed by Africa (1.3 million hectares) and Asia (almost 0.8 million hectares) (Table 15 and Figure 22). The most important crops are olives, with nearly 0.9 million hectares, constituting almost 19 percent of the organic permanent cropland, followed by coffee (more than 0.7 million hectares), nuts (0.6 million hectares), grapes (almost 0.5 million hectares), and cocoa (almost 0.4 million hectares) (Figure 23 and Table 18).

Table 18: Use of organic permanent cropland (including in-conversion areas), 2018 and 2019 compared

Crop group	2018 [ha]	2019 [ha]	Change 2018-2019 [ha]	Organic share [%]
Berries	60'545	74'672	14'127	13.5
Citrus fruit	90'045	102'897	12'852	0.9
Cocoa	321'484	363'706	42'223	3.1
Coconut	386'448	300'960	-85'488	2.4
Coffee	729'319	709'118	-20'201	6.7
Flowers and ornamental plants' permanent	24	23	-1	0.0
Fruit	24'318	29'173	4'854	0.5
Fruit of temperate climate zones	236'325	308'543	72'218	2.6
Fruit' tropical and subtropical	276'642	237'026	-39'616	0.8
Fruit/nuts/berries	6'071	4'027	-2'043	0.0
Grapes	422'747	467'760	45'012	6.7
Medicinal and aromatic plants' permanent	92'277	97'679	5'402	3.1
Nurseries	981	777	-204	0.0
Nuts	631'929	600'328	-31'601	4.1
Olives	858'978	881'543	22'566	8.4
World*	**4'676'455**	**4'693'697**	**17'242**	**2.8**

Source: FiBL survey 2021, based on data from governments, the private sector, and certifiers. For detailed data sources see annex, page 317
**Total includes permanent crop groups, for which no further details were available.*

Distribution of organic permanent cropland by region 2019
Source: FiBL survey 2021

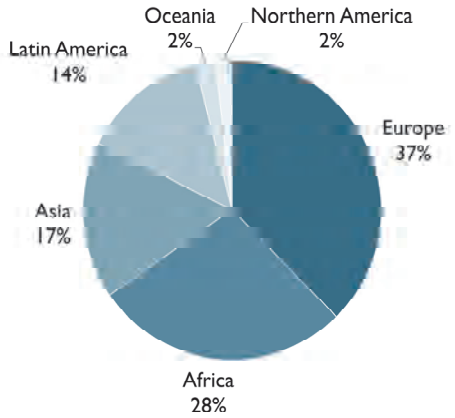


Figure 22: World: Distribution of permanent cropland by region 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Use of permanent cropland by crop group 2019
Source: FiBL survey 2021

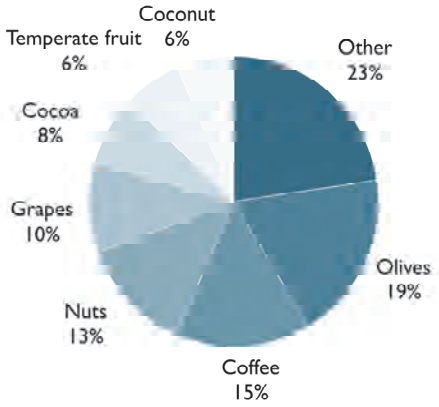


Figure 23: World: Use of permanent cropland by crop group 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

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 34.8 million hectares was reported in 2019. 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, Namibia and the United Republic of Tanzania (beekeeping) (Figure 25). According to experts, wild berries, apiculture, and medicinal and aromatic plants, as well as nuts in Africa and 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 2018 and 2019 compared

Region	2018 [ha]	2019 [ha]	Change 2018-2019 [ha]	Change 2018-2019 [%]
Africa	11'471'980	16'341'099	+4'869'119	+42.4%
Asia	2'795'448	3'222'620	+427'172	+15.3%
Europe	16'939'795	10'613'341	-6'326'454	-37.3%
Latin America	3'444'450	4'593'699	+1'149'249	+33.4%
North America	6'981	24'119	+17'137	+245.5%
Oceania	765	112	-653	-85.4%
World	**34'659'419**	**34'794'989**	**+135'570**	**+0.4%**

Source: FiBL survey 2021, based on data from governments, the private sector, and certifiers.
For detailed data sources see annex, page 317

Table 20: Wild collection and beekeeping areas by crop group 2019

Land use	Area [ha]
Apiculture	2'581'592
Berries, wild	161'613
Coffee, wild	8'666
Forest honey	2'500'000
Forest products	2'685
Fruit, wild	2'379'232
Medicinal and aromatic plants, wild	4'119'427
Mushrooms, wild	11
Nuts, wild collection	3'660'356
Oil plants, wild	31'995
Palm sugar	916
Palmito, wild	60'249
Rose hips, wild	2'692'271
Seaweed	2'255
Wild collection, no details	16'593'722
World	**34'794'989**

Source: FiBL survey 2021, 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 317

Distribution of organic wild collection and beekeeping areas by region 2019
Source: FiBL survey 2021

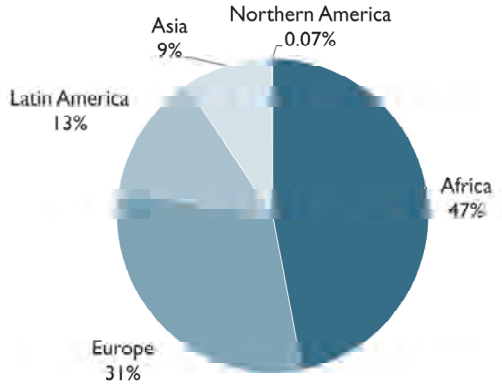


Figure 24: World: Distribution of organic wild collection and beekeeping areas by region in 2019

Source: FiBL survey 2021, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 317

The ten countries with the largest wild collection and beekeeping areas 2019
Source: FiBL survey 2021

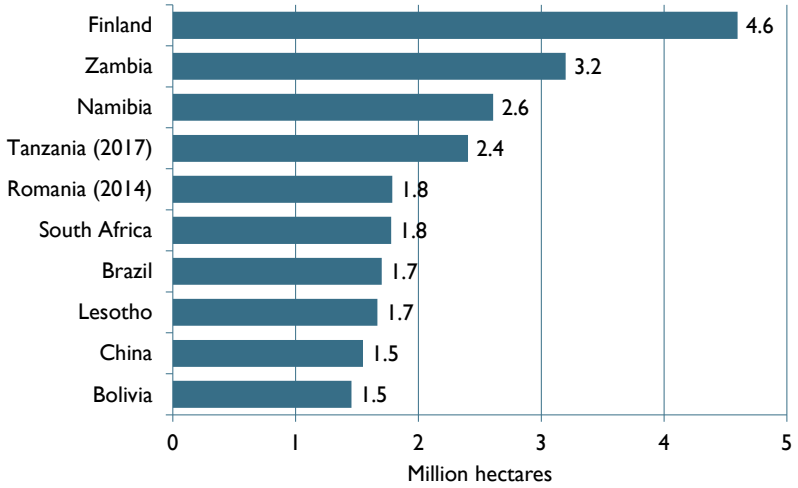


Figure 25: World: The ten countries with the largest organic wild collection and beekeeping areas in 2019

Source: FiBL survey 2021, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 317

Table 21: Wild collection and beekeeping areas by country 2019

Country	Land use	Area [ha]
Albania	Wild collection, no details	645'042
Algeria	Wild collection, no details	628
Argentina	Wild collection, no details	20'900
Armenia	Wild collection, no details	8'570
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	Strawberries, wild	3
	Wild collection, no details	946'895
Belgium	Wild collection, no details	3
Bhutan	Wild collection, no details	7'746
Bolivia	Berries, wild	69'073
	Medicinal and aromatic plants, wild, other	1
	Brazil nuts, wild collection	1'386'761
Bosnia and Herzegovina	Wild collection, no details	11'579
Botswana	Fruit, wild, other	2
Brazil	Bamboo, wild	27
	Brazil nuts, wild collection	1'693'830
	Acai, wild collection	7'581
Bulgaria	Wild collection, no details	307'020
Burkina Faso	Shea nuts, wild	229'172
	Wild collection, no details	36'410
Cameroon	Fruit, wild	112'000
Canada	Wild collection, no details	24'119
Chad	Gums natural	5'800
Chile	Berries, wild, other	92'092
	Blackberries, wild	187
	Seaweed	800
China	Wild collection, no details	1'549'800
Colombia	Palmito, wild	6'800
	Wild collection, other	520
Denmark	Wild collection, no details	2'648
Ecuador	Wild collection, no details	1'000
Estonia	Wild collection, no details	104'305
Eswatini	Forest products	564
Ethiopia	Coffee, wild	7'629
Faroe Islands	Wild collection, no details	0
Finland	Wild collection, no details	4'600'000
Georgia	Wild collection, no details	215
Ghana	Coconuts, wild	44'750
	Medicinal and aromatic plants, wild	3'777
	Shea nuts, wild	3'193
Greece	Wild collection, no details	317'053
Guatemala	Wild collection, no details	147'234

Country	Land use	Area [ha]
Guinea	Wild collection, other	1'075
Guyana	Forest products	2'000
	Palmito, wild	53'449
India	Wild collection, no details	1'370'579
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	Strawberries, wild	2
Jamaica	Bamboo, wild	36
Kenya	Apiculture	121'625
	Coconuts, wild	582'261
Kosovo	Wild collection, no details	179'580
Kyrgyzstan	Almonds, wild	177
	Apples, wild	1'995
	Pistachios, wild	2'900
	Plums, wild	1'214
	Walnuts, wild	7'193
Lao P.D.R.	Bamboo, wild	282
	Wild collection, no details	16'786
Lebanon	Nuts, wild, no details	259
Lesotho	Rose hips, wild	1'667'028
Madagascar	Medicinal and aromatic plants, wild	12'195
Mali	Shea nuts, wild	9'247
	Wild collection, other	7
Mauritania	Wild collection, no details	2'800
Mexico	Wild collection, no details	952'755
Moldova	Fruit, wild, other	200
	Medicinal and aromatic plants, wild, other	234
	Rose hips, wild	68
	Walnuts, wild	1'343
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	Fruit, wild, other	1'256'290
	Wild collection, no details	31'400
Namibia	Devil's claw	2'609'108
Nepal	Wild collection, no details	24'422
Nicaragua	Medicinal and aromatic plants, wild, other	93
Niue	Fruit, wild, no details	112
North Macedonia	Medicinal and aromatic plants, wild	556'600
Pakistan	Pine nuts, wild	44'620
Peru	Brazil nuts, wild collection	158'560
Portugal	Wild collection, no details	40'000
Romania	Wild collection, no details	1'787'548

Country	Land use	Area [ha]
Russian Federation	Pine nuts, wild	121
	Seaweed	1'317
	Wild collection, no details	156'614
Rwanda	Medicinal and aromatic plants, wild	42'377
Senegal	Gums natural	20'240
	Nuts, wild	20'724
	Wild collection, other	100
Slovenia	Wild collection, no details	13'238
Somalia	Gums natural	801'000
	Medicinal and aromatic plants, wild, no details	14'000
	Wild collection, no details	7'300
South Africa	Aloe vera, wild collection	45'000
	Devil's claw	10'000
	Forest products	6
	Honeybush	1'358
	Medicinal and aromatic plants, wild	667'354
	Mushrooms, wild	11
	Rooibos tea, wild	28'756
	Rose hips, wild	1'025'175
	Wild collection, no details	5
	Coffee, wild	1'037
Spain	Wild collection, no details	38'184
Sudan	Baobab	1'340
	Fruit, wild	98'026
	Gum Olibanum	1'053
	Gums natural	404'300
	Wild collection, other	100'000
Syrian Arab Republic	Wild collection, no details	8'000
Tanzania, United Republic of	Apiculture	2'403'700
Thailand	Wild collection, no details	90'716
Togo	Fruit, wild	6'455
	Wild collection, other	15
Tunisia	Seaweed	2
	Wild collection, other	48'956
Turkey	Berries, wild	95
	Medicinal and aromatic plants, wild	9'796
	Nuts, wild	23'392
	Wild collection, other	147'053
Uganda	Shea nuts, wild	78'684
Ukraine	Wild collection, no details	580'000
Uzbekistan	Wild collection, no details	5'000
Viet Nam	Wild collection, no details	12'450
Zambia	Forest honey	2'500'000
	Fruit, wild, other	700'000
Zimbabwe	Forest products	115
	Fruit, wild, other	190'450
	Medicinal and aromatic plants, wild	118'472
World		**34'794'989**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Beehives

There were 3 million organic beehives in 2019, representing almost 3.4 percent of the world's beehives.[1] Organic beehives are concentrated in Europe (47 percent) and Latin America (30 percent) (Figure 26). The country with the largest number of organic beehives is Brazil (629'939), followed by Zambia (368'274) and Bulgaria (264'069). The total number increased almost six-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 2019, decreases were reported for Bulgaria, Mexico and Chile.

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 90'116'413 beehives in 2019. 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

Distribution of organic beehives by region 2019
Source: FiBL survey 2021

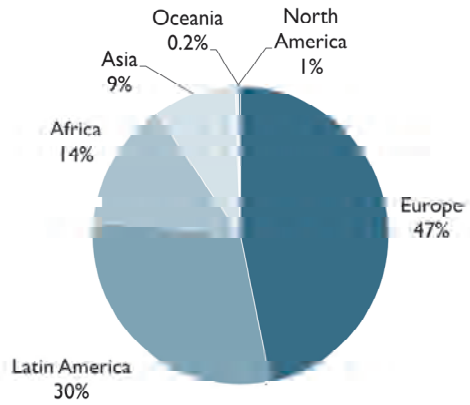


Figure 26: World: Distribution of organic beehives by region in 2019

Source: FiBL survey 2021, based on data from government bodies, the private sector, and certifiers. For detailed data sources see annex, page 317

Development of the organic beehives 2008-2019
Source: FiBL-IFOAM-SOEL-Surveys 2006-2021

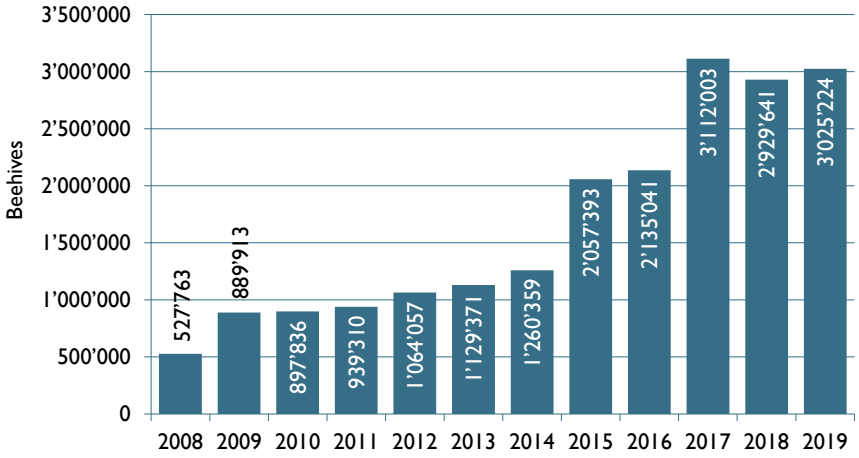


Figure 27: World: Development of the organic beehives 2008-2019

Source: FiBL-IFOAM-SOEL surveys 2006-2021. For detailed data sources see annex, page 317

Table 22: Number of organic beehives by country 2019

Country	Beehives [no.]
Argentina	33'426
Armenia	2'358
Australia	6'475
Austria	22'874
Azerbaijan	932
Belarus	65
Belgium	22
Bhutan	177
Bosnia and Herzegovina	150
Brazil	629'939
Bulgaria	264'069
Burkina Faso	11
Canada	10'882
Chile	10'123
China	229'084
Croatia	2'023
Cuba	58'901
Czech Republic	703
Denmark	631
Dominican Republic	9'804
Estonia	2'530
Finland	5'483
France	245'192
Georgia	570
Germany	35'000
Guadeloupe (France)	80
Guatemala	2'210
Iran (Islamic Republic of)	4'640
Iraq	1'900
Italy	171'094
Kosovo	40
Latvia	52'369
Lebanon	527
Liechtenstein	174
Lithuania	1'785
Luxembourg	145
Madagascar	47'798
Mexico	111'131
Moldova	7'200
Montenegro	1'964
Morocco	1'242
Nicaragua	20'985
North Macedonia	17'199
Norway	3'551
Poland	5'175
Portugal	95'954
Réunion (France)	1'332
Romania	262'154
Russian Federation	716
Saudi Arabia	5'794
Serbia	3'061
Slovakia	439
Slovenia	1'814
South Africa	1
Spain	158'050
Sweden	2'182
Thailand	27'337
Tunisia	786
Turkey	50'100
Ukraine	300
Uruguay	24'297
Zambia	368'274
World	**3'025'224**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

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 almost 690'000 metric tons of organic aquaculture was reported in 2019. According to the available data, aquaculture production is concentrated in Asia (81 percent mainly China) and Europe (15 percent). The largest production volume was found in China (561'200 metric tons) followed by Ireland (more than 27'000 metric tons) and Chile (more than 26'000 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.

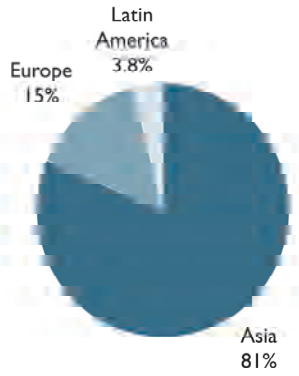
A breakdown by species was available for two thirds of the total production. According to the available data, organic mussels are the most produced species (over 27'000 metric tons), followed by salmon (16'400 metric tons), and sturgeon (almost 1'800 metric tons).

Table 23: Organic aquaculture: Production volume by species 2019

Main species	Production [MT]
Aquatic plants	417'383
Aquaculture, no details	222'153
Mussels	27'315
Salmon	16'361
Sturgeon	1'766
Rainbow trouts	1'581
Carps	1'574
Trout	560
Shrimps	382
Sea bass	244
Seabream	216
Bream	54
Bass	44
Oysters	6
Total	**689'638**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Distribution of organic aquaculture production volume by region 2019
Source: FiBL survey 2021



The ten countries with the largest aquaculture production volume 2019
Source: FiBL survey 2021

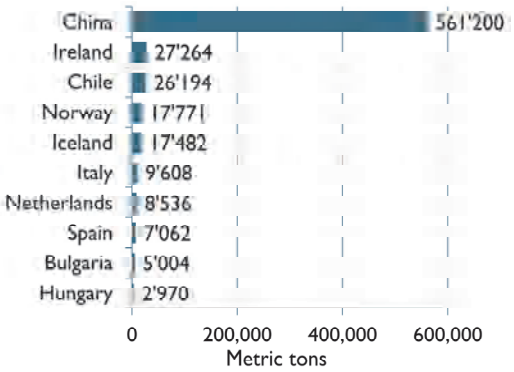
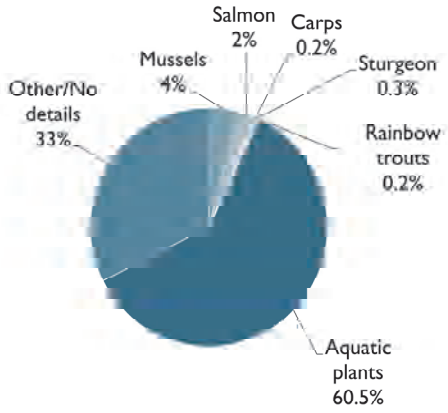


Figure 28: World: Organic aquaculture production volume: Distribution by continent and top 10 countries 2019

Source: FiBL-survey 2021; based on national data sources and certifier data. For detailed data sources see annex, page 317

Distribution of organic aquaculture production volume by species 2019
Source: FiBL survey 2021



Key organic aquaculture species by production volume 2019
Source: FiBL survey 2021

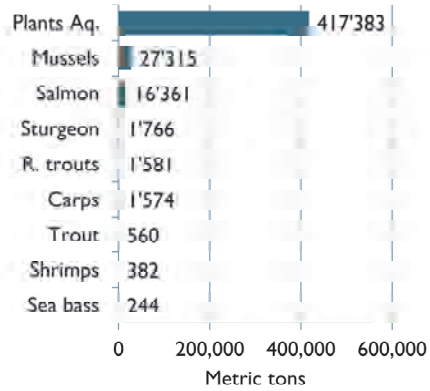


Figure 29: World: Organic aquaculture production volume: Distribution by species and key species 2019

Source: FiBL-survey 2021; based on national data sources and certifier data. For detailed data sources see annex, page 317

Table 24: Organic aquaculture: Production volume by country 2019

Country	Production [MT]
Bangladesh	342
Bulgaria	5'004
Chile	26'194
China	561'200
Croatia	291
Czech Republic	1
Ecuador	79
Greece	1'267
Hungary	2'970
Iceland	17'482
Ireland	27'264
Italy	9'608
Latvia	8
Lithuania	613
Netherlands	8'536
Norway	17'771
Poland	160
Portugal	1'100
Romania	1'493
Slovenia	733
Spain	7'062
Switzerland	370
Taiwan	50
Viet Nam	40

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

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.

Also in this edition, we are presenting graphs on selected crops and crop groups: 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 2018 as provided by FAO and Eurostat. 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 2019 (overview including conversion areas)

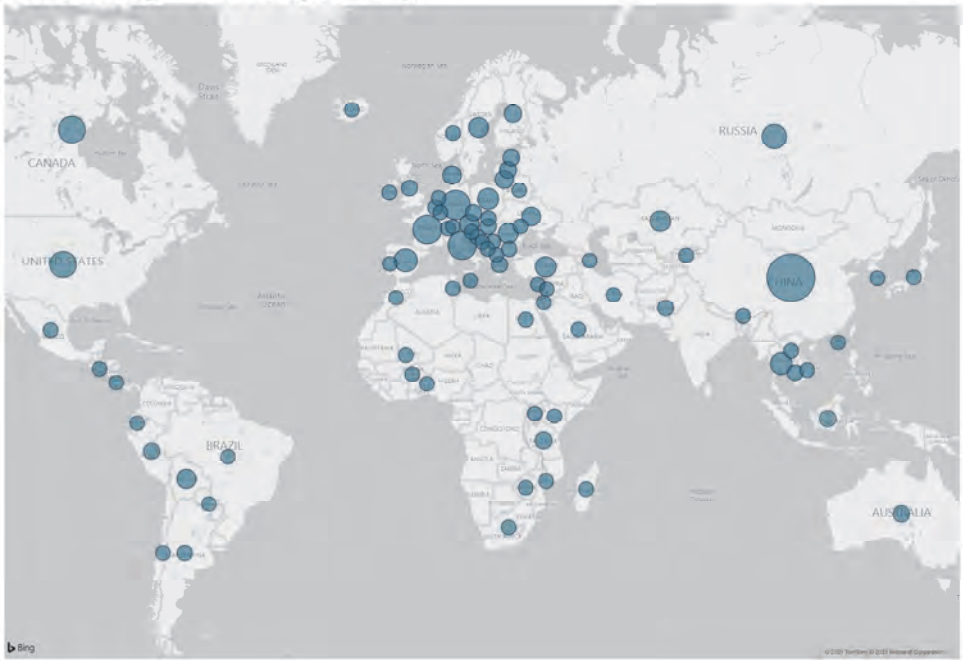
Crop	Africa [ha]	Asia [ha]	Europe [ha]	Latin America [ha]	North America [ha]	Oceania [ha]	Total [ha]
Cereals	74'344	1'253'310	2'958'165	163'769	582'255	41'293	5'073'137
Citrus fruit	10'378	12'787	57'472	16'857	5'403		102'897
Cocoa	217'169	423		146'114			363'706
Coffee	330'253	99'478		268'418	115	10'855	709'118
Dry pulses	51'846	83'896	548'275	18'016	104'829		806'862
Fruit temperate	15'091	118'124	147'926	8'284	19'117		308'543
Fruit, tropical and subtropical	47'484	69'957	38'874	75'513	5'122	76	237'026
Grapes	3'401	17'141	398'659	13'612	27'444	7'503	467'760
Oilseeds	183'884	640'235	653'600	60'805	137'978		1'676'502
Olives	243'552	6'512	624'260	6'591	628		881'543
Vegetables	40'055	66'833	201'071	41'050	80'120	4'035	433'165

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

› Cereals

In 2019, almost 5.1 million hectares or 0.7 percent of the global cereal area was under organic management.

Cereals: Organic area by country



Cereals: Distribution of the global organic cereal area by cereal type

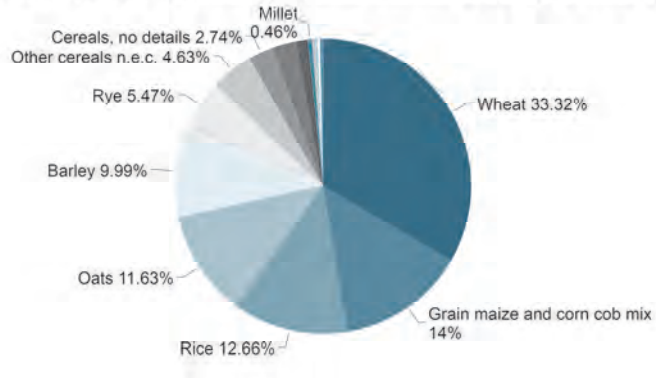


Figure 30: Cereals: Organic area 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments.

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

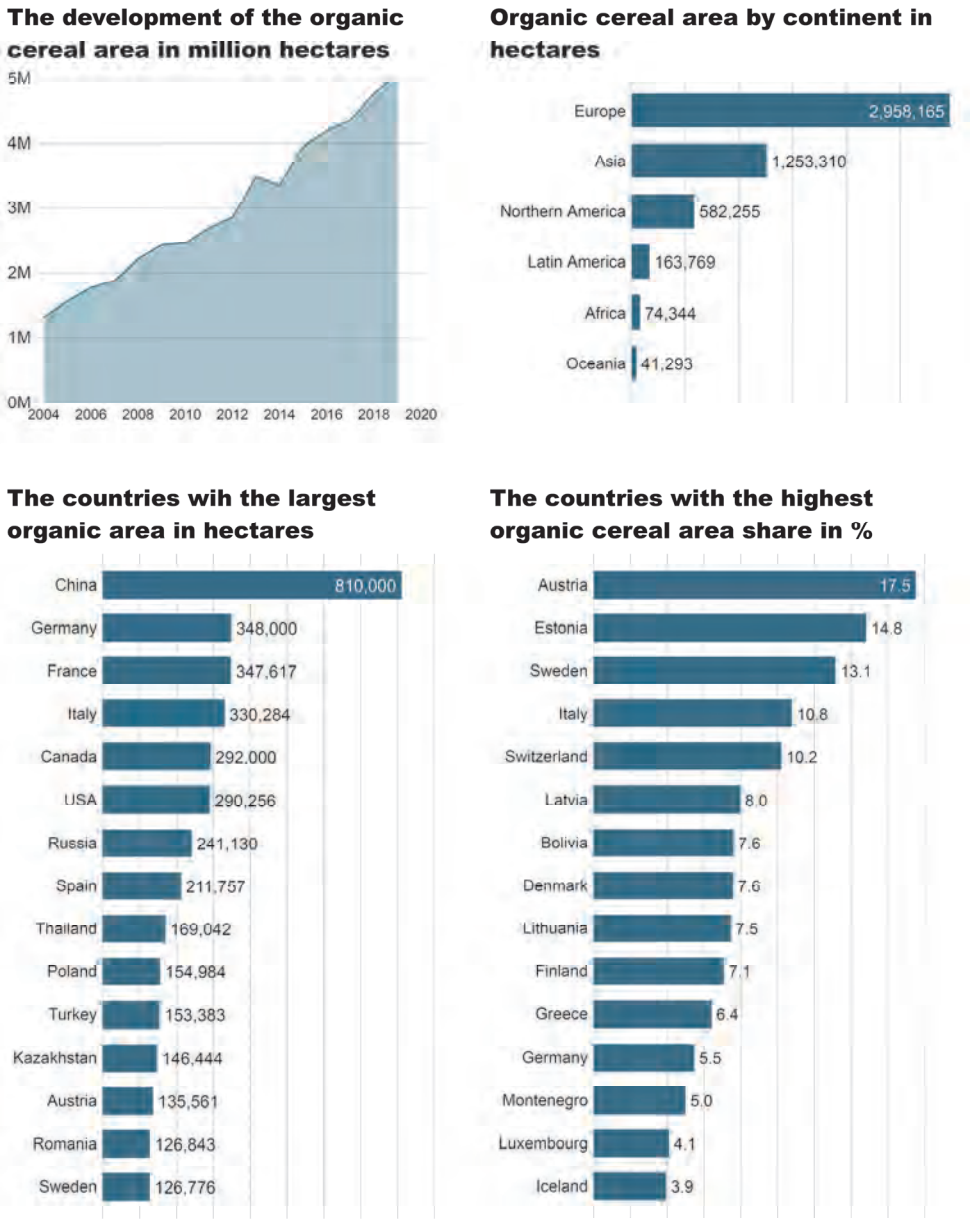


Figure 31: Cereals: Organic area 2019

Source: FiBL survey 2021, 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 2019

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	14'298	0.09		
Australia	41'293	0.25	41'293	
Austria	135'561	17.50		
Azerbaijan	1'598	0.15		1'598
Belarus	464	0.02		
Belgium	12'199	3.90	8'944	3'255
Benin	4	0.00		
Bhutan	537	0.96	523	14
Bolivia	106'232	7.59	96'865	9'367
Bosnia and Herzegovina	138	0.04	138	
Brazil	434	0.00		
Bulgaria	17'846	0.87	15'821	2'026
Burkina Faso	5'163	0.11	5'163	
Cambodia	23'858	0.77	23'420	438
Canada	292'000	1.95		
Chile	273	0.05	273	
China	810'000	0.81	593'000	217'000
Congo D.R.	212	0.01	212	
Costa Rica	38	0.10	38	
Croatia	15'814	3.22	13'357	2'457
Cyprus	890	3.86	725	164
Czech Republic	40'909	3.03	29'926	10'983
Denmark	103'385	7.57	65'641	37'744
Ecuador	1'289	0.19	1'147	141
Egypt	8'869	0.29	8'869	
Estonia	53'919	14.81	46'247	7'674
Finland	67'012	7.07	57'058	9'955
France	347'617	3.75	203'943	143'675
Germany	348'000	5.46		
Greece	46'494	6.39	26'748	19'747
Hungary	40'698	1.61	31'534	9'164
Iceland	59	3.93	59	
Indonesia	53'974	0.25	53'963	11
Iran	522	0.01	510	12
Ireland	2'511	0.94	2'005	507
Israel	1'188	1.72	1'068	120
Italy	330'284	10.77	268'177	62'110
Japan	2'964	0.16	2'964	
Kazakhstan	146'444	0.99		35'468
Kenya	486	0.02	214	272
Kyrgyzstan	462	0.08	334	128
Lao P.D.R.	4'598	0.45		
Latvia	58'523	7.96	52'544	5'980
Lebanon	61	0.11	61	
Liechtenstein	98	0.00	95	3

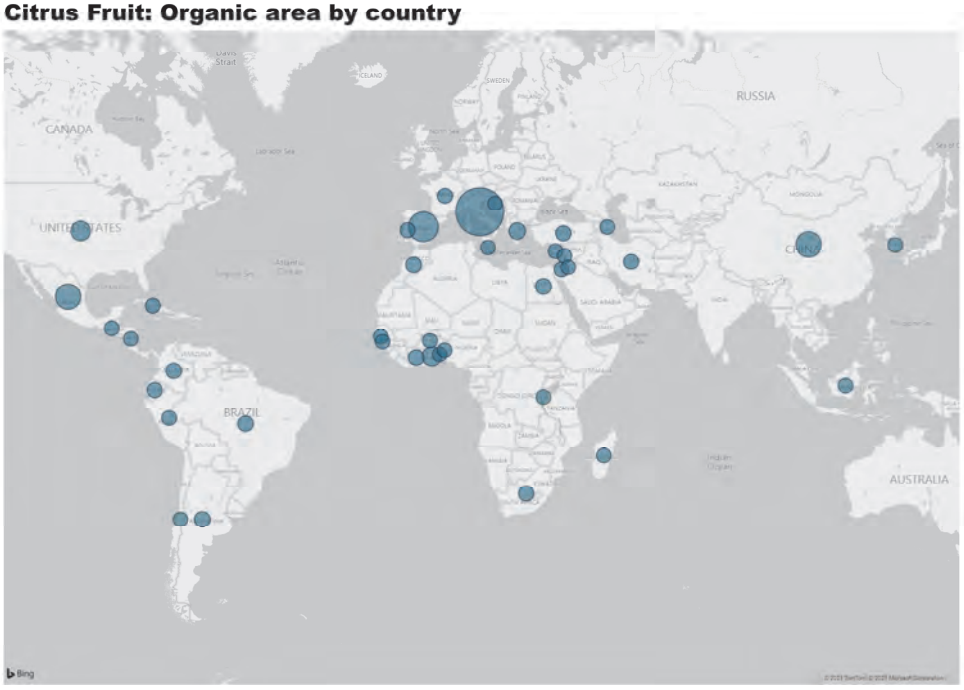
Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Lithuania	100'938	7.45	95'248	5'690
Luxembourg	1'114	4.09	999	114
Madagascar	56	0.01	46	10
Mali	260	0.00	260	
Malta	4	0.00	4	
Mexico	3'888	0.04	3'888	
Moldova	11'401	1.23	8'201	3'200
Montenegro	110	4.98	79	31
Morocco	12	0.00	12	
Mozambique	4	0.00	4	
Netherlands	3'807	2.12	3'259	548
North Macedonia	1'145	0.71	638	507
Norway	6'427	2.30	5'783	644
Pakistan	31'179	0.23	27'327	3'851
Palestine	95	0.40	51	44
Paraguay	250	0.01	250	
Peru	37'067	2.98		
Poland	154'984	2.20	117'875	37'109
Portugal	4'513	1.99	4'079	435
Republic of Korea	1'686	0.20		
Romania	126'843	2.28	83'470	43'373
Russian Federation	241'130	0.57		2'650
Saudi Arabia	430	0.17	367	63
Serbia	4'789	0.28	2'741	2'048
Slovakia	22'691	2.95	18'662	4'029
Slovenia	2'267	2.30	2'068	198
South Africa	1'797	0.06	1'607	190
Spain	211'757	3.55	190'547	21'212
Sweden	126'776	13.14	111'079	15'697
Switzerland	14'482	10.19		
Taiwan	3'033	1.00	3'033	
Tanzania	50'860	0.77	50'860	
Thailand	169'042	1.44		
Tunisia	1'595	0.10	1'595	
Turkey	153'383	1.41	120'368	33'015
Uganda	5'016	0.27		
Ukraine	107'537	0.76		8'057
United Kingdom	39'647	1.23	36'674	2'973
USA	290'256	0.54	290'256	
Viet Nam	1'640	0.02	1'263	377
Zimbabwe	10	0.00	10	
World	**5'073'137**	**0.70**	**2'835'482**	**766'079**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317
Blank cells: No data available

› Citrus fruit

In 2019, about 100'000 hectares or 0.9 percent of the global citrus fruit area was under organic management.

Citrus Fruit: Organic area by country



Citrus fruit: Use of the organic citrus fruit area

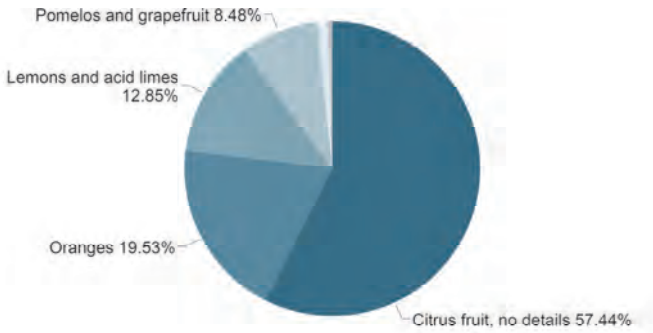


Figure 32: Citrus fruit: Organic area 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments.

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

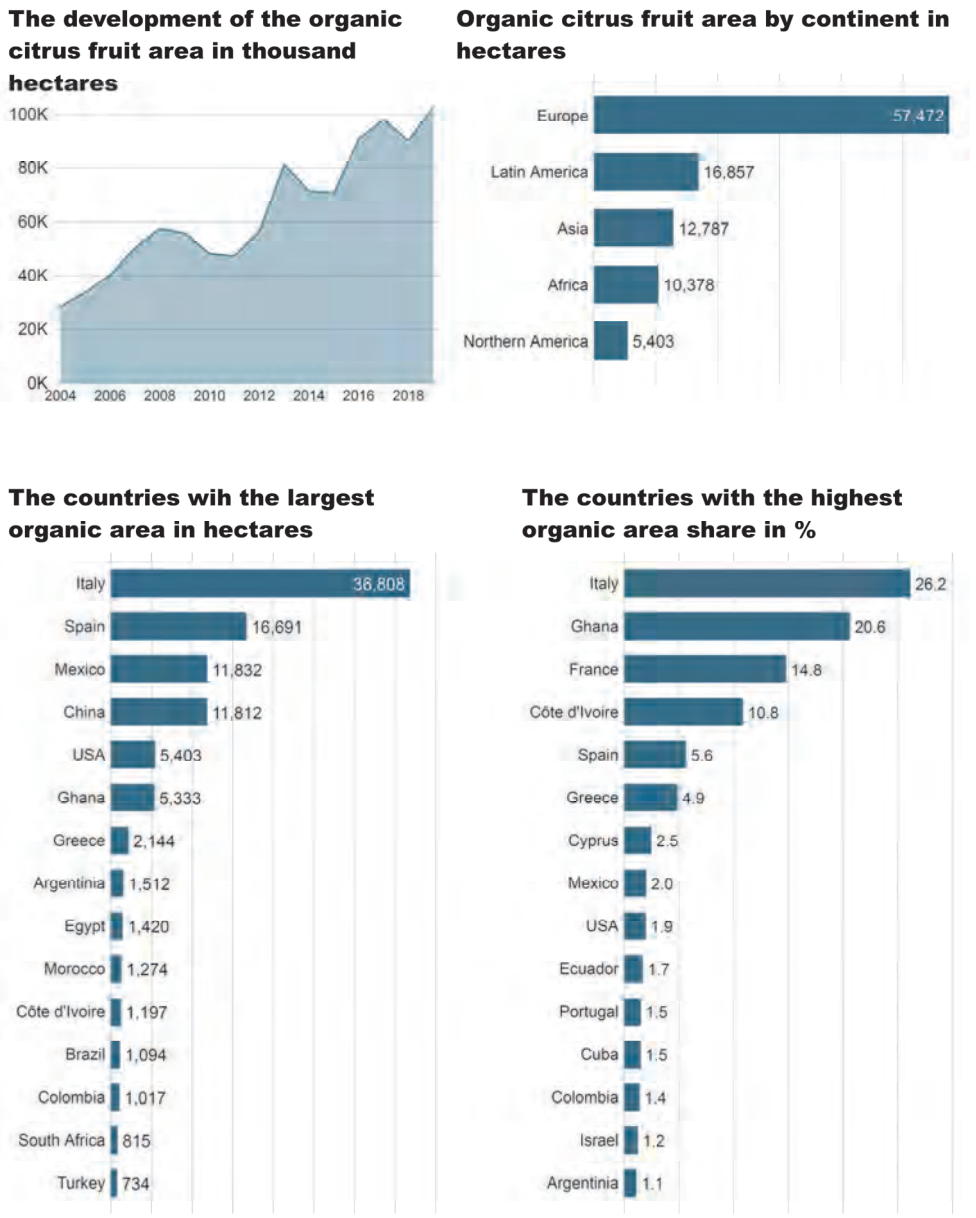


Figure 33: Citrus fruit: Organic area 2019

Source: FiBL survey 2021, 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 2019

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	1'512	1.1		
Azerbaijan	21	0.7	2	19
Benin	2	0.0		
Brazil	1'094	0.2		
Burkina Faso	283		283	
Burundi	0	0.0	0	0
Chile	144	0.7	144	
China	11'812	0.4	4'348	7'464
Colombia	1'017	1.4	980	37
Côte d'Ivoire	1'197	10.8	1'197	
Croatia	23	1.0	12	11
Cuba	167	1.5		
Cyprus	79	2.5	66	13
Ecuador	580	1.7	531	49
Egypt	1'420	0.7	1'420	
France	681	14.8	398	283
Gambia	11	0.0		11
Ghana	5'333	20.6	5'333	
Greece	2'144	4.8	1'379	766
Guatemala	224	0.9	224	
Guinea-Bissau	1	0.0	1	
Indonesia	0	0.0	0	
Iran	583	0.3	4	579
Israel	274	1.2	239	35
Italy	36'808	26.2	31'813	4'995
Jordan	13	0.2		
Lebanon	23	0.2	20	3
Madagascar	33	0.2	33	0
Malta	1	0.0		1
Mexico	11'832	2.0	11'832	
Morocco	1'274	1.0	995	279
Nicaragua	4	0.0		4
Palestine	1	0.0	1	
Peru	283	0.4		
Portugal	311	1.5	204	107
Republic of Korea	60	0.3		
South Africa	815	0.9	610	205
Spain	16'691	5.6	10'045	6'646
Togo	9	0.3	9	
Turkey	734	0.5	249	485
USA	5'403	1.9	5'403	
World	**102'897**	**0.9**	**77'775**	**21'991**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317. Blank cells: No data available.

› Cocoa beans

In 2019, about 363'000 hectares or 3.1 percent of the global cocoa area was under organic management.

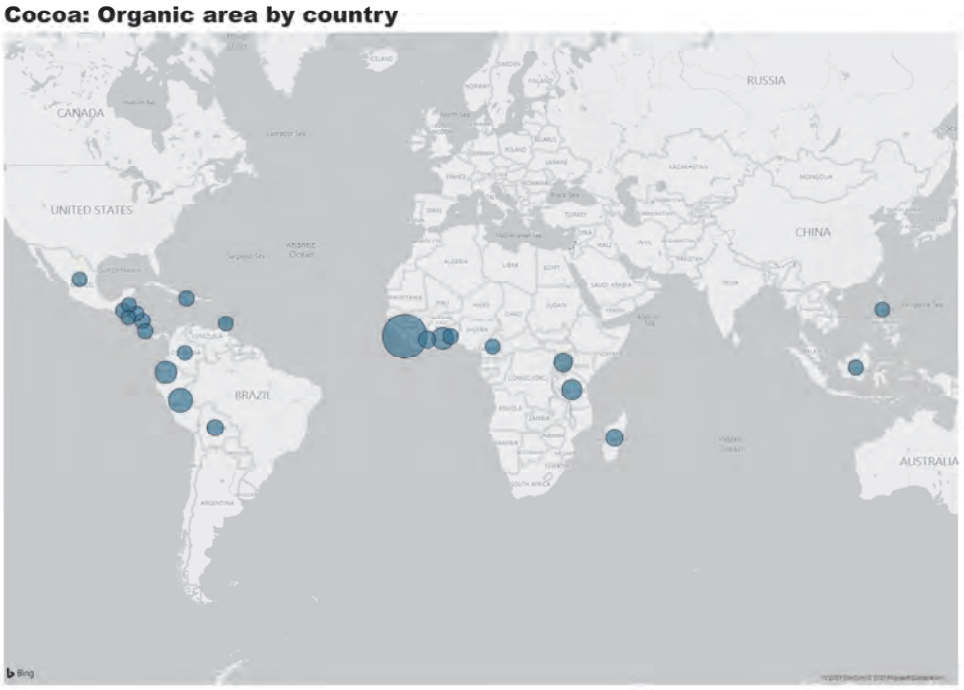


Figure 34: Cocoa: Organic area 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments.

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

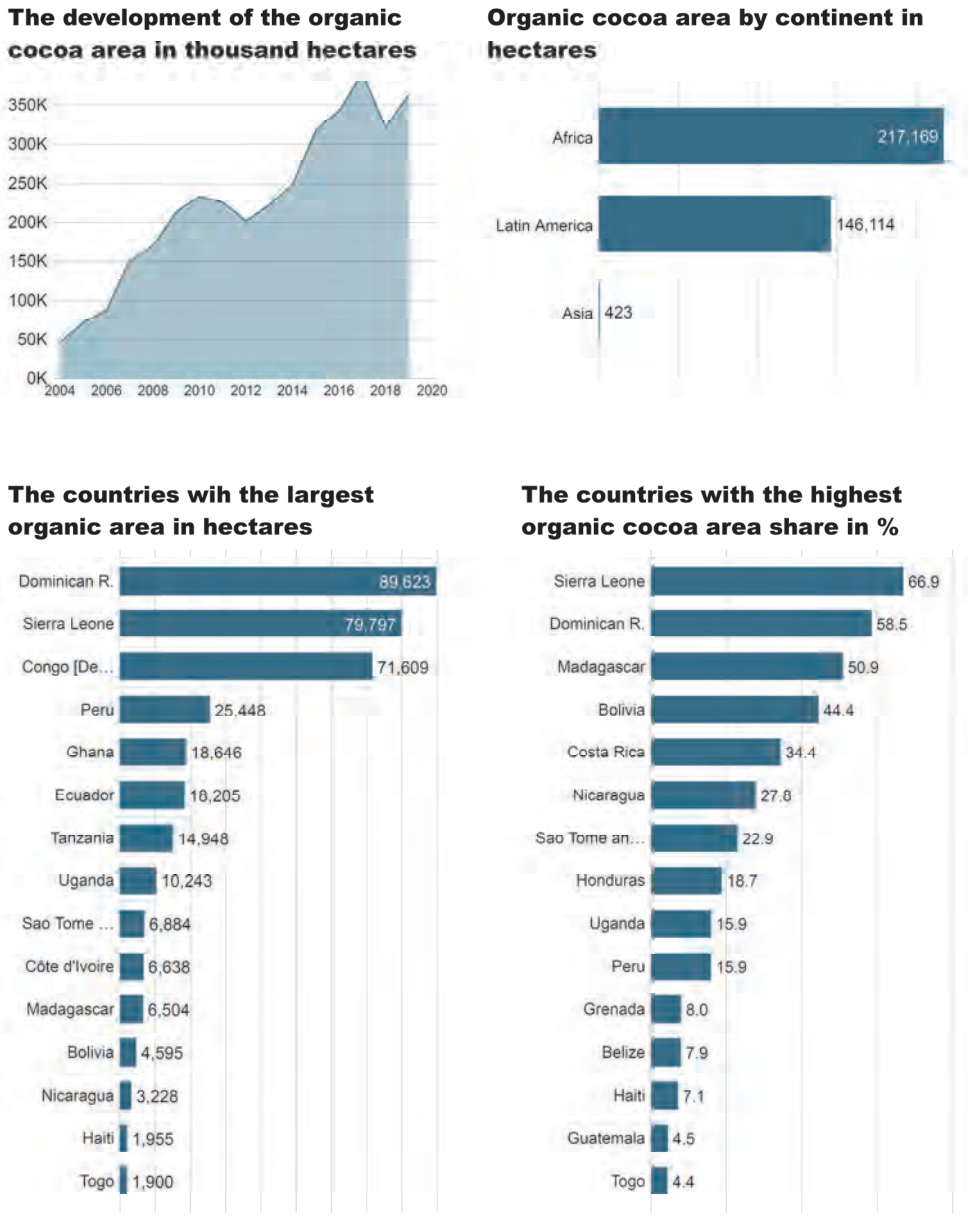


Figure 35: Cocoa: Organic area 2019

Source: FiBL survey 2021, 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 2019

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Belize	40	7.9		
Bolivia	4'595	44.4	3'976	619
Cameroon	1	-		
Colombia	375	0.3	357	18
Costa Rica	1'492	34.3	1'492	
Côte d'Ivoire	6'638	0.2	6'368	270
Congo D.R.	71'609		71'609	
Dominican Republic	89'623	58.5	89'623	
Ecuador	18'205	3.6	15'708	2'497
El Salvador	2	0.2		2
Ghana	18'646	1.0	18'259	387
Grenada	84	8.0		
Guatemala	194	4.5	194	
Haiti	1'955	7.1	1'955	
Honduras	753	18.7		
Indonesia	376	-	360	17
Madagascar	6'504	50.9	6'504	0
Mexico	119	0.2	119	
Nicaragua	3'228	27.8	2'563	665
Peru	25'448	15.9		
Philippines	47	0.2	47	
São Tomé and Príncipe	6'884	22.9	6'884	
Sierra Leone	79'797	66.9	79'797	0
Tanzania, United Republic of	14'948		14'948	
Togo	1'900	4.4	1'900	
Uganda	10'243	15.9		
World	**363'706**	**3.1**	**322'662**	**4'474**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317
Blank cells: No data available.

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 2020."[1]

[1] Meier, C., Sampson, G., Larrea, C., Schlatter, B., Voora, V., Dang, D., Bermudez, S., Wozniak, J., and Willer, H. (2020). The State of Sustainable Markets 2020: Statistics and Emerging Trends. ITC, Geneva. Available at: https://vss.fibl.org/.
For interactive online graphics see the Sustainability Map at https://www.sustainabilitymap.org/trends

› Coffee

In 2019, around 709'000 hectares or 6.7 percent of the global coffee area was under organic management.

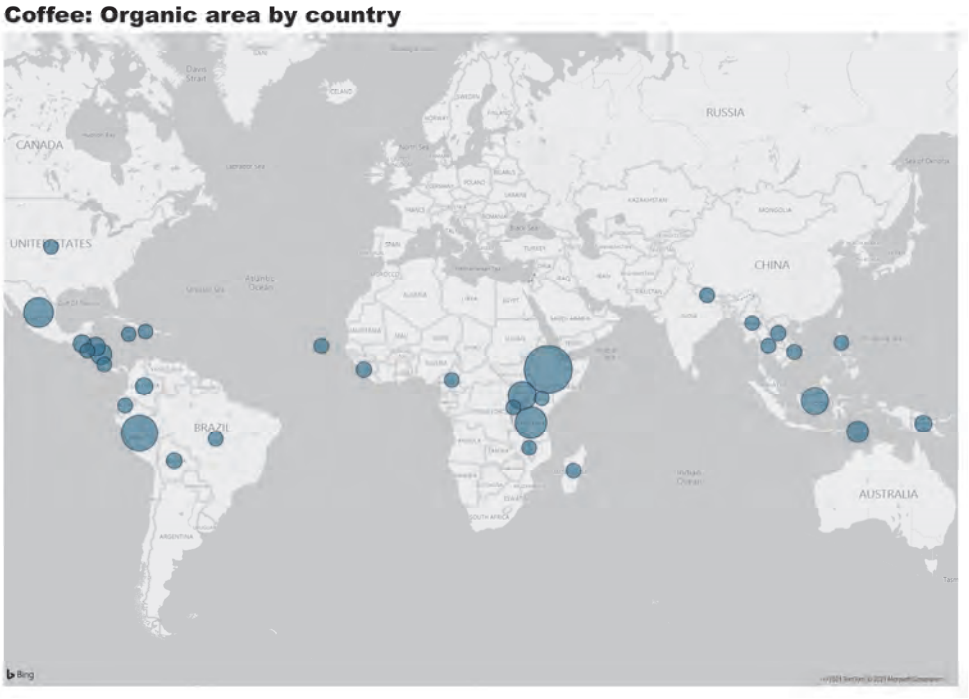


Figure 36: Coffee: Organic area 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments.

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

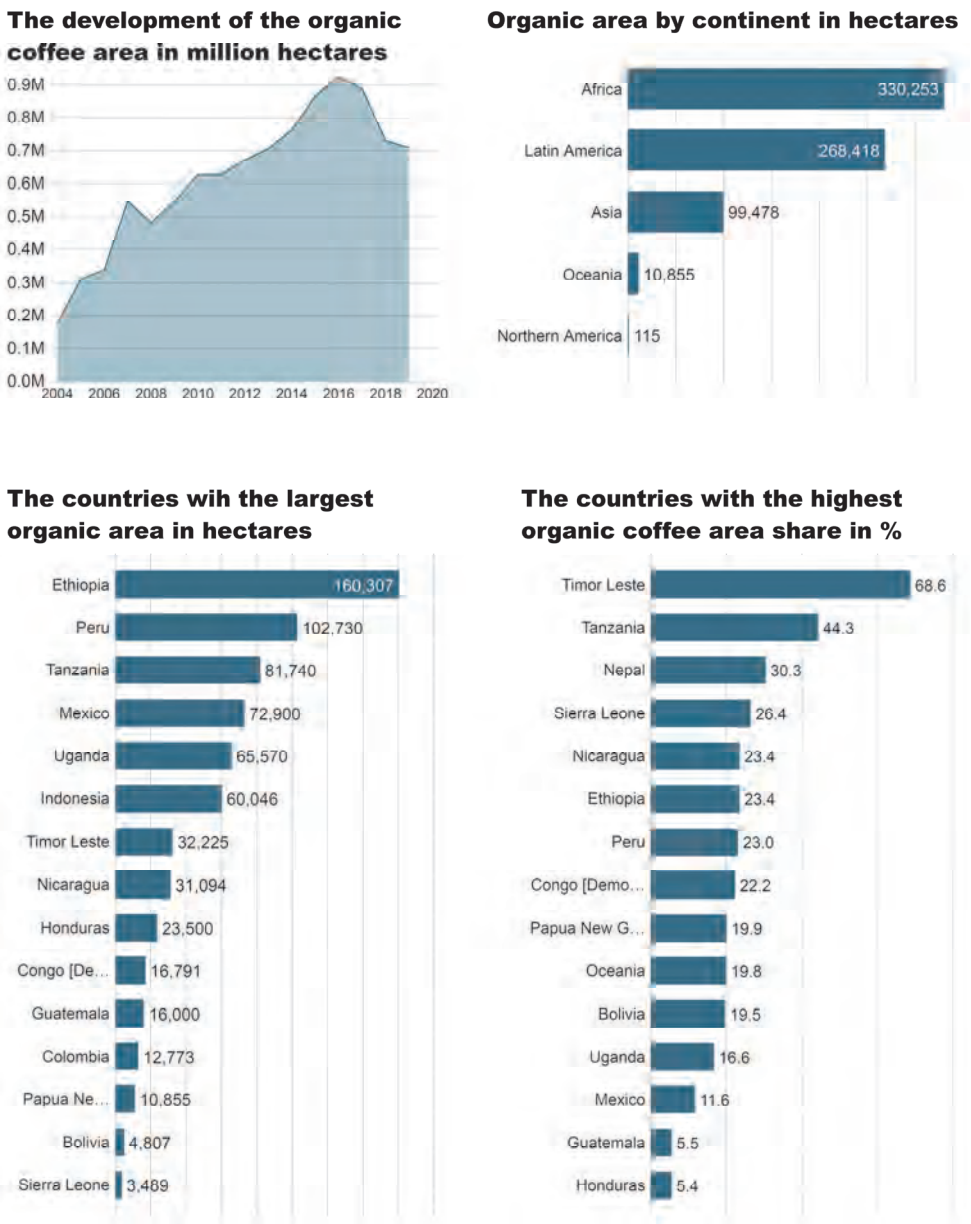


Figure 37: Coffee: Organic area 2019

Source: FiBL survey 2021, 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 2019

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Bolivia	4'807	19.5	4'255	552
Brazil	576	-		
Cameroon	17	-		
Cape Verde	495		495	
Colombia	12'773	1.6	11'864	909
Costa Rica	591	0.7	591	
Congo D.R.	16'791	22.2	16'791	
Dominican Republic	205	0.3	205	
Ecuador	1'550	4.9	1'289	261
El Salvador	1'522	1.2	1'468	53
Ethiopia	160'307	23.4	160'307	
Guatemala	16'000	5.5	16'000	
Haiti	169	0.2	169	
Honduras	23'500	5.4		
Indonesia	60'046	4.8	59'828	218
Jamaica	2	0.0		2
Kenya	251	0.2	250	1
Lao P.D.R.	2'982	3.6		
Madagascar	571	0.5	571	0
Malawi	8	0.2	7	1
Mexico	72'900	11.6	72'900	
Myanmar	37	0.3	37	
Nepal	804	30.3	804	
Nicaragua	31'094	23.4	22'885	8'209
Papua New Guinea	10'855	19.9	10'855	
Peru	102'730	23.0		
Philippines	6	0.0	6	
Rwanda	586	1.2	586	0
São Tomé and Príncipe	429		429	
Sierra Leone	3'489	26.4	3'489	0
Tanzania	81'740	44.3	81'740	
Thailand	1'259	2.9		
Timor-Leste	32'225	68.6	32'225	
Uganda	65'570	16.6		
USA	115	3.7	115	
Viet Nam	2'120	0.3	420	1'700
World	**709'118**	**6.7**	**500'580**	**11'905**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317
Blank cells: No data available.

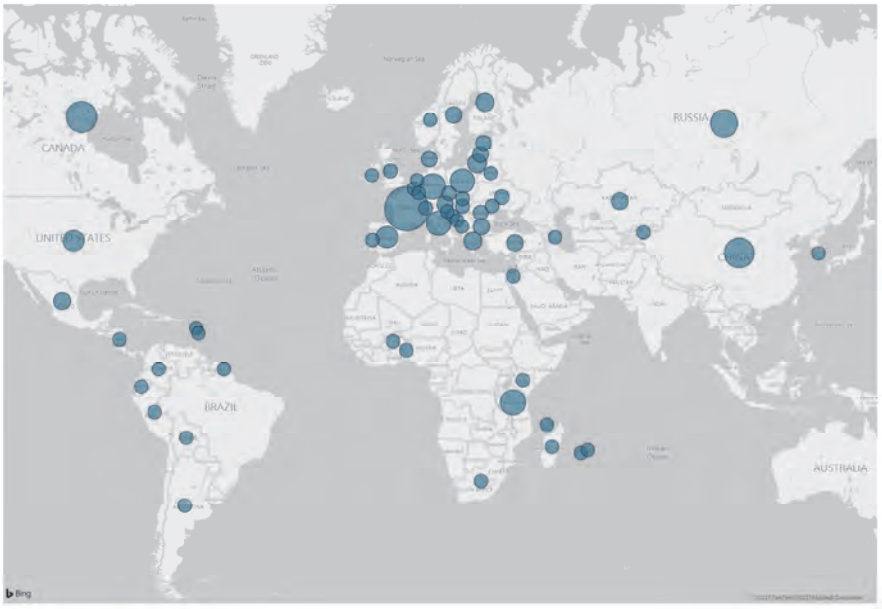
For more information on coffee production (organic and other Voluntary Sustainability Standards - VSS), please see the report "The State of Sustainable Markets – Statistics and Emerging Trends 2020."[1]

[1] Meier, C., Sampson, G., Larrea, C., Schlatter, B., Voora, V., Dang, D., Bermudez, S., Wozniak, J., and Willer, H. (2020). The State of Sustainable Markets 2020: Statistics and Emerging Trends. ITC, Geneva. Available at: https://vss.fibl.org/.
For interactive online graphics see the Sustainability Map at https://www.sustainabilitymap.org/trends

› Dry pulses[1]

In 2019, almost 807'000 hectares or 0.8 percent of the global dry pulses area was under organic management.

Dry Pulses: Organic area by country



Dry Pulses: Use of the organic dry pulses area

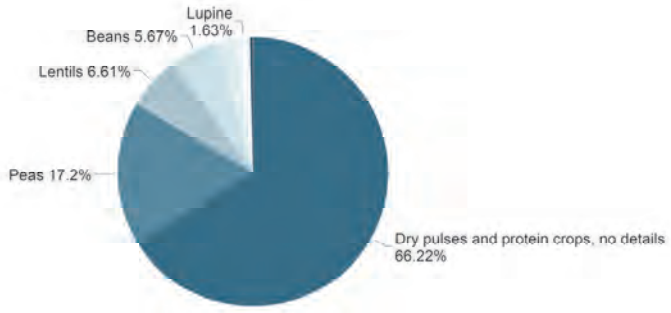


Figure 38: Dry Pulses: Organic area 2019

Source: FiBL survey 2021, 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."

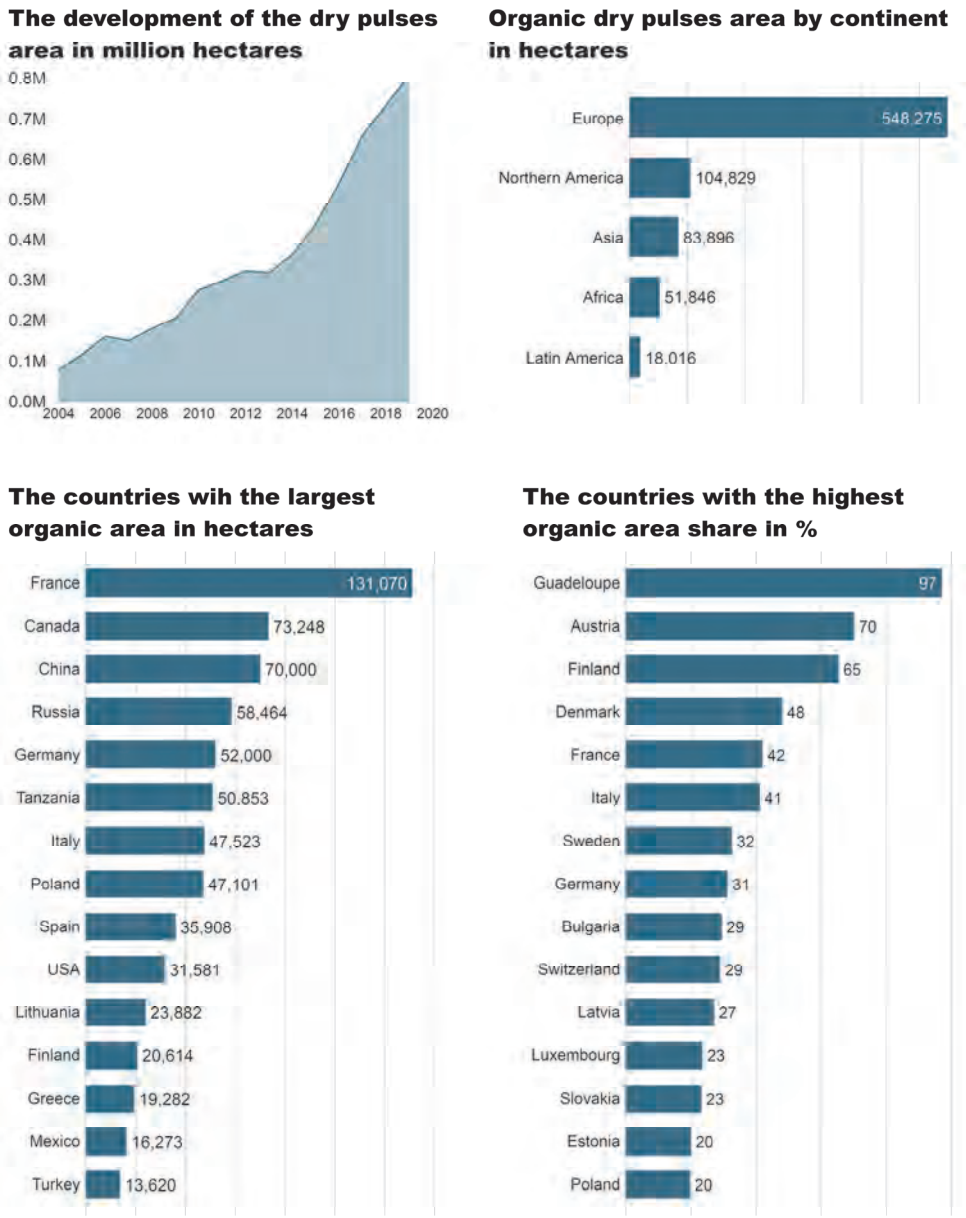


Figure 39: Dry Pulses: Organic area 2019

Source: FiBL survey 2021 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 2019

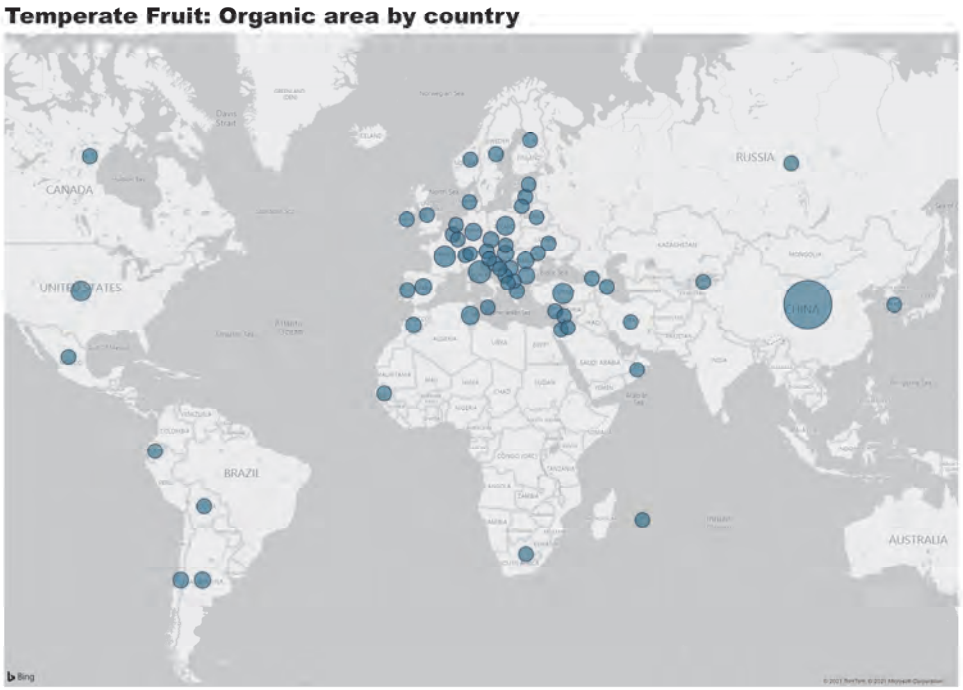
Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	1'224	0.2		
Austria	12'374	70.0		
Azerbaijan	6	0.0	2	4
Belarus	40	0.0		
Belgium	384	8.3	326	58
Benin	0	0.0		
Bolivia	31	0.0	21	10
Bosnia and Herzegovina	24	0.2	24	
Bulgaria	12'380	29.4	11'154	1'227
Burkina Faso	16	0.0	16	
Canada	73'248	2.3		
China	70'000	2.5	57'000	13'000
Colombia	4	0.0	4	
Croatia	97	3.9	84	12
Czech Republic	4'115	12.2	2'882	1'233
Denmark	10'645	48.0	4'924	5'722
Ecuador	49	0.2	25	24
Estonia	8'544	19.9	7'034	1'511
Finland	20'614	65.2	16'312	4'302
France	131'070	41.9	92'666	38'404
French Guiana (France)	114	0.0	74	40
Germany	52'000	31.2		
Greece	19'282	15.0	13'041	6'241
Guadeloupe (France)	66	97.1	45	21
Hungary	3'244	18.5	2'923	321
Ireland	101	1.2	78	24
Israel	38	0.5	32	6
Italy	47'523	41.0	39'653	7'869
Kazakhstan	13'388	1.6		8'880
Kenya	215	0.0	215	
Kyrgyzstan	400	0.4	400	
Latvia	10'902	27.0	9'903	999
Lithuania	23'882	16.1	22'338	1'544
Luxembourg	96	23.4	96	
Macao		0.0		
Madagascar	183	0.2	183	0
Martinique (France)	46	2.6	43	3
Mauritius	0	0.0	0	
Mayotte	4	0.0	3	1
Mexico	16'273	0.9	16'273	
Moldova	1'658	4.3	889	769
Montenegro	1	0.2	1	
Netherlands	242	6.9	212	30
Nicaragua	205	0.1	205	
Norway	426	13.1	355	71

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Peru	5	0.0		
Poland	47'101	19.6	34'944	12'157
Portugal	1'016	4.8	983	34
Republic of Korea	64	0.5		
Réunion (France)	275	0.0	239	36
Romania	7'411	6.3	5'991	1'420
Russian Federation	58'464	2.2		878
Slovakia	2'257	23.1	1'857	400
Slovenia	75	7.3	66	9
South Africa	300	0.4	263	37
Spain	35'908	8.5	31'713	4'194
Sweden	12'783	32.5	10'252	2'532
Switzerland	1'628	28.9		
Tanzania	50'853	2.4	50'853	
Turkey	13'620	1.5	6'249	7'371
Ukraine	4'964	0.9		327
United Kingdom	3'403	1.9	2'754	650
United States of America	31'581	1.8	31'581	
World	**806'862**	**0.8**	**477'181**	**122'371**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317
Blank cells: No data available

Temperate Fruit

In 2019, more than 308'000 hectares or 2.6 percent of the global temperate fruit area was under organic management.



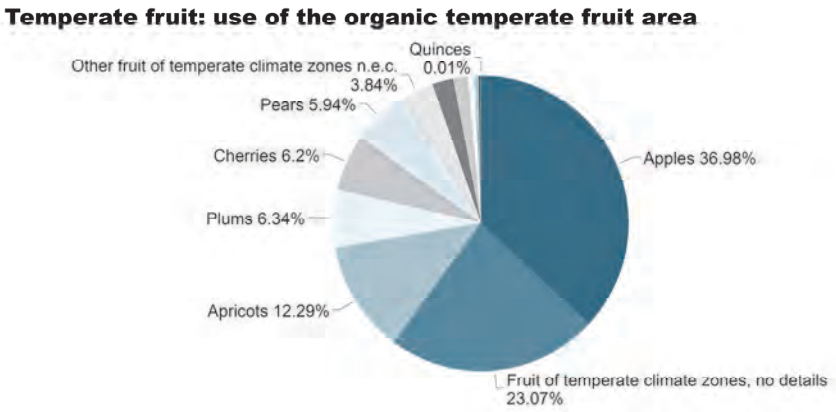


Figure 40: Temperate Fruit: Organic area 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments.

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

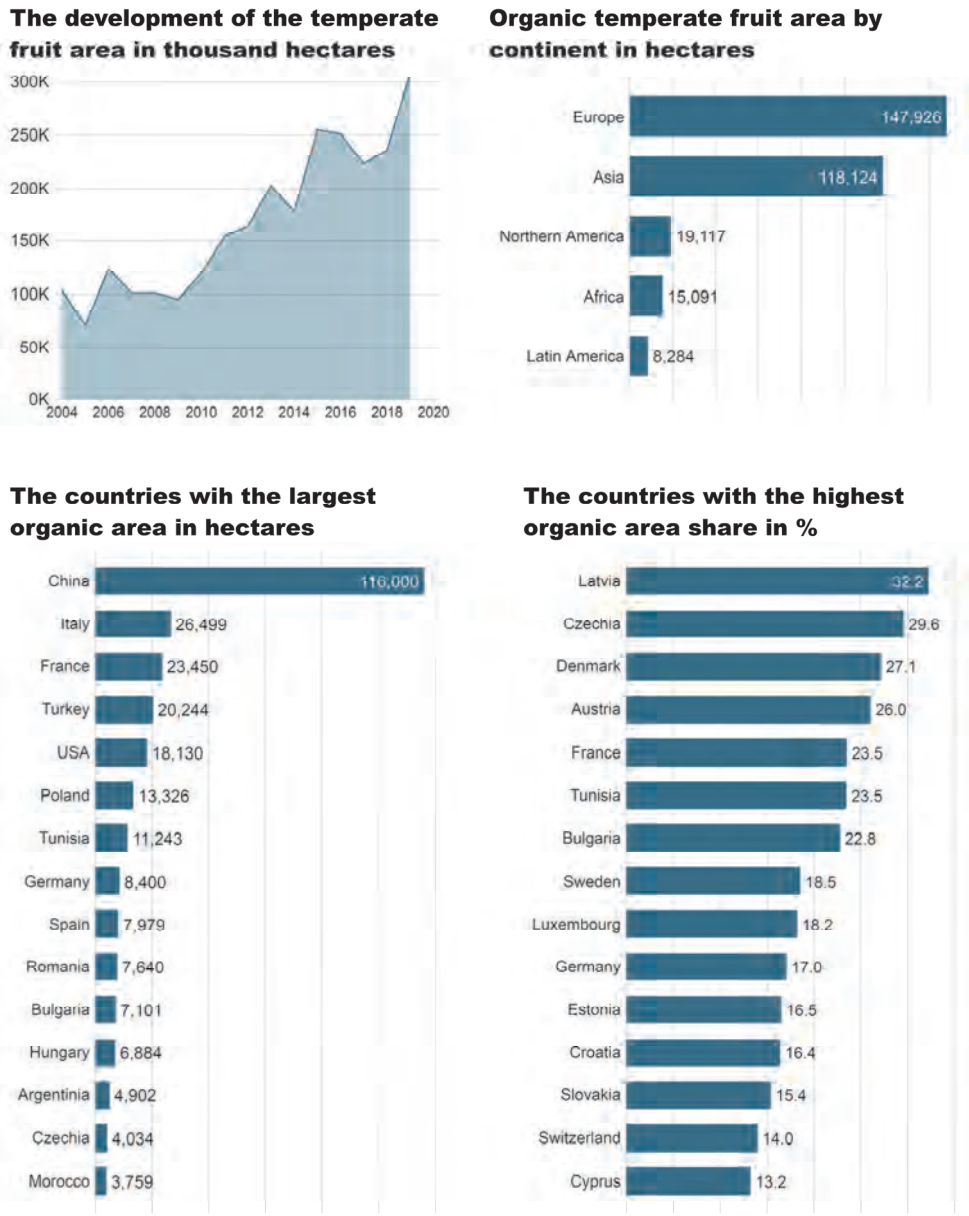


Figure 41: Temperate Fruit: Organic area 2019

Source: FiBL survey 2021, 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 2019

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	2	0.0		2
Argentina	4'902	5.8		
Austria	2'235	26.0		
Azerbaijan	754	1.3	112	642
Belarus	14	0.0		
Belgium	1'043	6.0	628	415
Bolivia	2	0.0	2	
Bosnia and Herzegovina	2	0.0	2	0
Bulgaria	7'101	22.8	4'645	2'456
Canada	987	4.4		
Chile	3'273	3.2	3'273	
China	116'000	2.0	84'000	32'000
Croatia	2'337	16.4	1'607	731
Cyprus	210	13.2	167	44
Czech Republic	4'034	29.6	3'461	574
Denmark	624	27.1	439	186
Ecuador	1	0.0	1	
Estonia	477	80.8	416	62
Finland	88	12.8	80	6
France	23'450	23.5	14'463	8'987
Georgia	855	2.1	855	
Germany	8'400	17.0		
Greece	2'013	2.4	1'299	714
Hungary	6'884	10.1	3'736	3'148
Iran (Islamic Republic of)	2	0.0	2	
Ireland	54	7.6	51	2
Israel	39	0.4	30	9
Italy	26'499	13.0	19'304	7'195
Jordan	0	0.0		
Kyrgyzstan	282	0.6	276	6
Latvia	1'337	32.2	1'207	129
Lebanon	58	0.2	54	4
Liechtenstein	3	0.0	2	1
Lithuania	1'006	7.8	898	108
Luxembourg	60	18.2	60	
Malta	1	0.0		1
Mauritius	1	0.0	1	
Mexico	107	0.1	107	
Moldova	656	0.7	609	47
Montenegro	102	7.6	53	49
Morocco	3'759	3.8	3'568	191
Netherlands	597	3.4	518	79
North Macedonia	240	0.6	131	112
Norway	229	10.7	182	46
Oman	4	0.0		

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Poland	13'326	5.9	10'003	3'324
Portugal	1'447	3.5	1'204	245
Republic of Korea	130	0.2		
Romania	7'640	5.8	4'144	3'498
Russian Federation	20	0.0		20
Senegal	1	0.0	1	
Serbia	2'352	1.7	1'833	518
Slovakia	555	15.4	522	33
Slovenia	392	12.8	228	165
South Africa	87	0.2	71	16
Spain	7'979	4.1	4'950	3'030
Sweden	313	18.5	264	47
Switzerland	851	14.0		
Tunisia	11'243	23.4	11'243	
Turkey	20'244	4.0	11'355	8'891
Ukraine	1'943	1.2		1'039
United Kingdom	1'164	6.2	1'111	54
USA	18'130	7.2	18'130	
World	**308'543**	**2.6**	**211'298**	**78'826**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317
Blank cells: No data available.

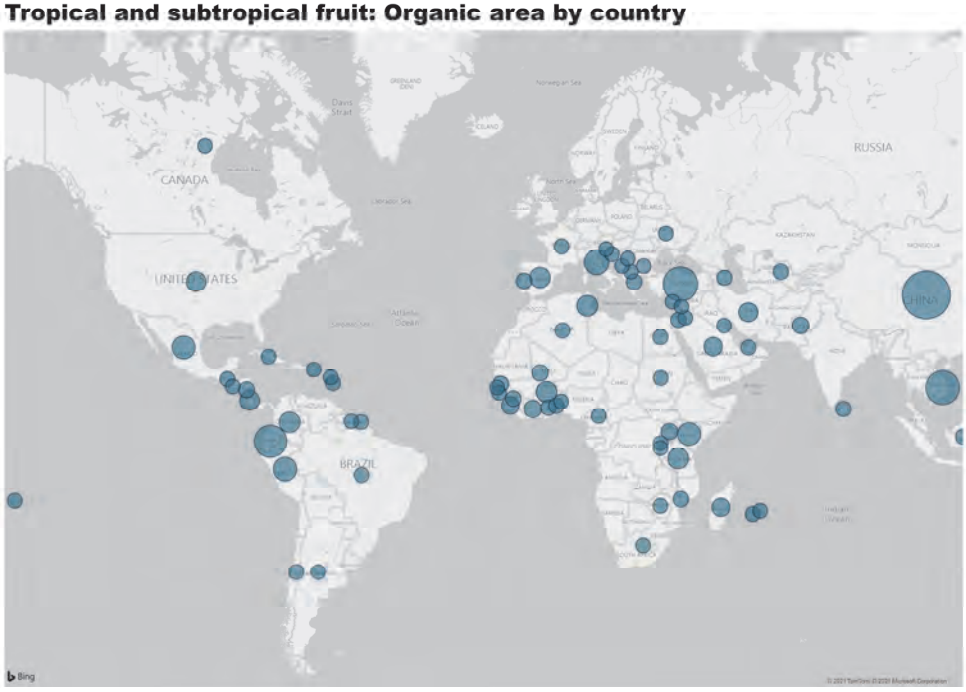
Further reading

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 2019, around 237'000 hectares or 0.9 percent 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

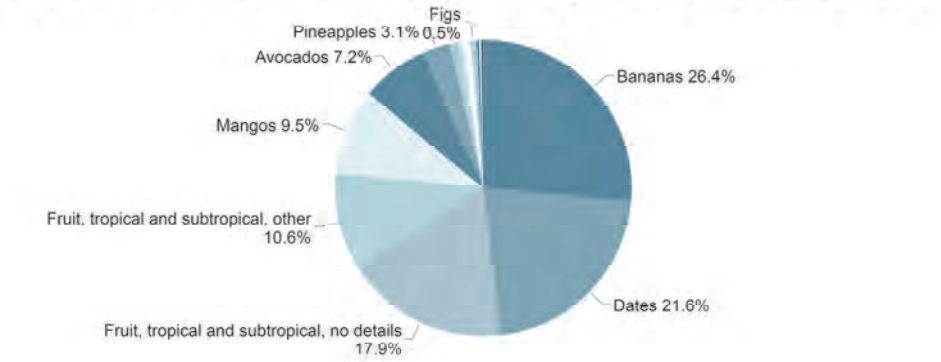


Figure 42: Tropical and subtropical fruit: Organic area 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments.

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

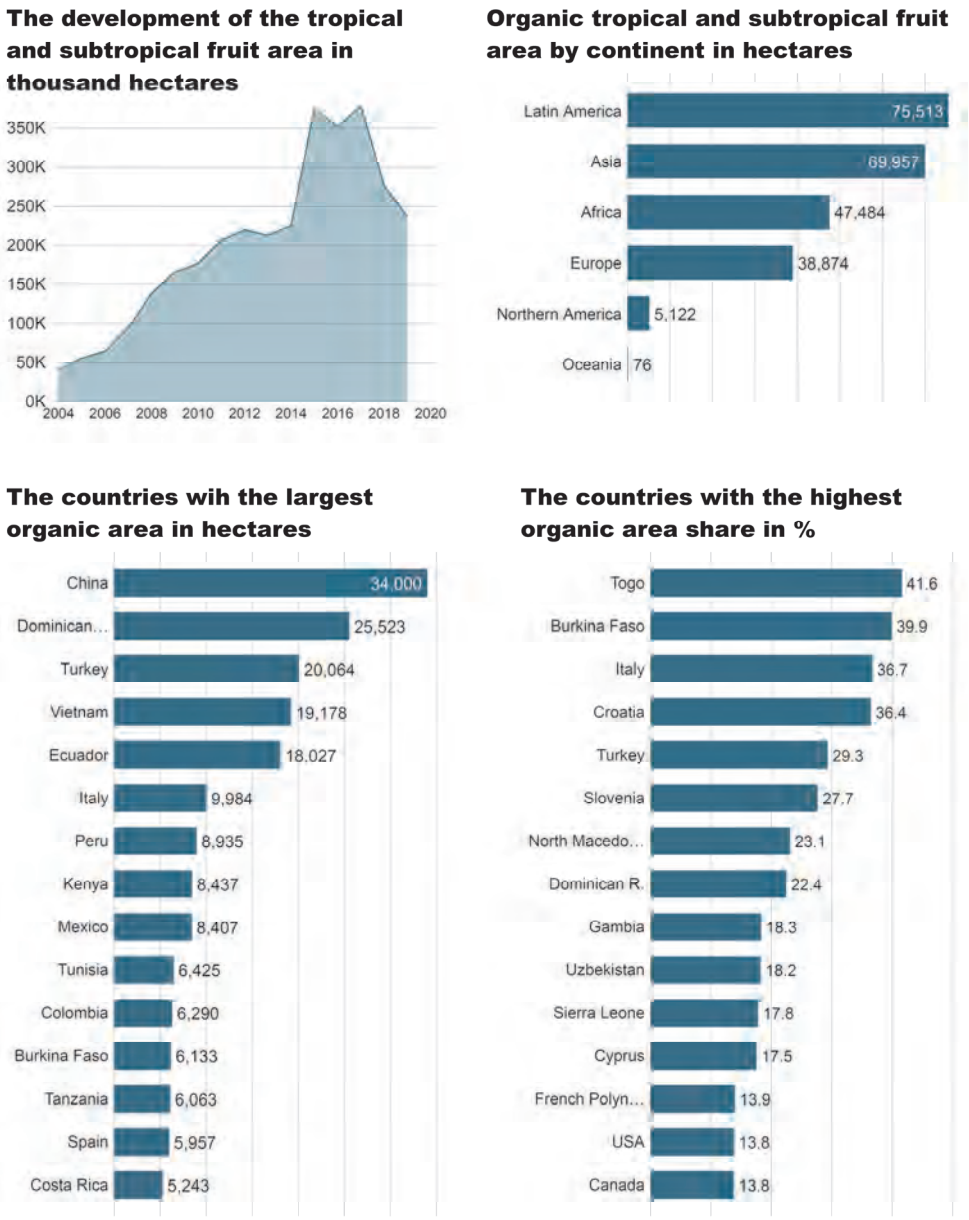


Figure 43: Tropical and subtropical fruit: Organic area 2019

Source: FiBL survey 2021, 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 2019

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Algeria	564	0.3	564	
Argentina	19	0.2		
Azerbaijan	495	4.0	180	315
Benin	58	0.4		
Brazil	180	0.0		
Bulgaria	36	0.0	32	4
Burkina Faso	6'133	39.9	6'115	18
Burundi	83	0.0	83	0
Cameroon	183	0.0		
Canada	1	13.8		
Chile	315	0.8	315	
China	34'000	1.1	11'000	23'000
Colombia	6'290	0.9	5'553	737
Cook Islands	15	13.5	15	
Costa Rica	5'243	4.6	5'243	
Côte d'Ivoire	2'777	0.4	2'406	371
Croatia	153	36.4	49	104
Cuba	68	0.1		
Cyprus	142	17.5	75	67
Democratic Republic of the Congo	7	0.0	7	
Dominican Republic	25'523	22.4	25'523	
Ecuador	18'027	5.8	15'006	3'021
Egypt	542	0.2	542	
El Salvador	12	0.1	12	
France	284	1.5	125	158
French Guiana (France)	326	11.0	237	89
French Polynesia	61	13.9	61	
Gambia	48	18.3	48	
Ghana	1'034	0.3	1'034	
Greece	1'182	7.6	770	413
Guadeloupe (France)	131	3.7	62	69
Guatemala	270	0.2	270	
Guinea	1'000	0.4	1'000	
Guinea-Bissau	98	0.5	98	
Indonesia	888	0.1	888	
Iran (Islamic Republic of)	4'750	1.7	4'619	131
Israel	1'021	4.1	837	184
Italy	9'984	36.7	7'625	2'359
Jordan	167	3.2		
Kenya	8'437	5.2	3'272	5'165
Kuwait	10	0.3	10	
Lebanon	55	1.3	28	27
Madagascar	3'303	1.5	3'303	0
Mali	1'800	2.1	1'720	80

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Martinique (France)	266	4.3	176	90
Mauritius	0	0.0	0	
Mexico	8'407	1.4	8'407	
Montenegro	3	0.2	1	1
Mozambique	785	0.8	785	
Nicaragua	1'384	7.1	1'258	125
North Macedonia	9	23.1	2	7
Pakistan	2'117	0.5	2'117	
Palestine	5	0.2	1	3
Peru	8'935	3.1		
Philippines	61	0.0	61	
Portugal	1'013	10.6	767	246
Puerto Rico	8	0.1		
Réunion (France)	368	0.0	277	91
Rwanda	243	0.1	238	6
Saudi Arabia	3'868	3.3	2'776	1'092
Senegal	1'491	6.4	1'491	
Serbia	0	0.0	0	
Sierra Leone	3'097	17.8	3'097	0
Slovenia	47	27.6	29	18
South Africa	8	0.0	6	2
Spain	5'957	8.1	3'584	2'374
Sri Lanka	591	0.6	591	0
Sudan	19	0.0	19	
Suriname	109	4.2	109	
Taiwan	1'548	1.8	1'548	
Tanzania	6'063	0.7	6'063	
Togo	976	41.6	976	
Tunisia	6'425	7.4	6'425	
Turkey	20'064	29.3	14'421	5'643
Uganda	1'942	0.2		
Ukraine	0	0.1		
United Arab Emirates	403	1.0	402	1
USA	5'122	13.8	5'122	
Uzbekistan	800	18.2	800	
Viet Nam	19'178	7.6	19'118	60
Zimbabwe	1	0.0	1	
World	**237'026**	**0.9**	**179'395**	**46'071**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments.

› Grapes

In 2019, almost 468'000 hectares or 6.7% of the global grape area was under organic management.

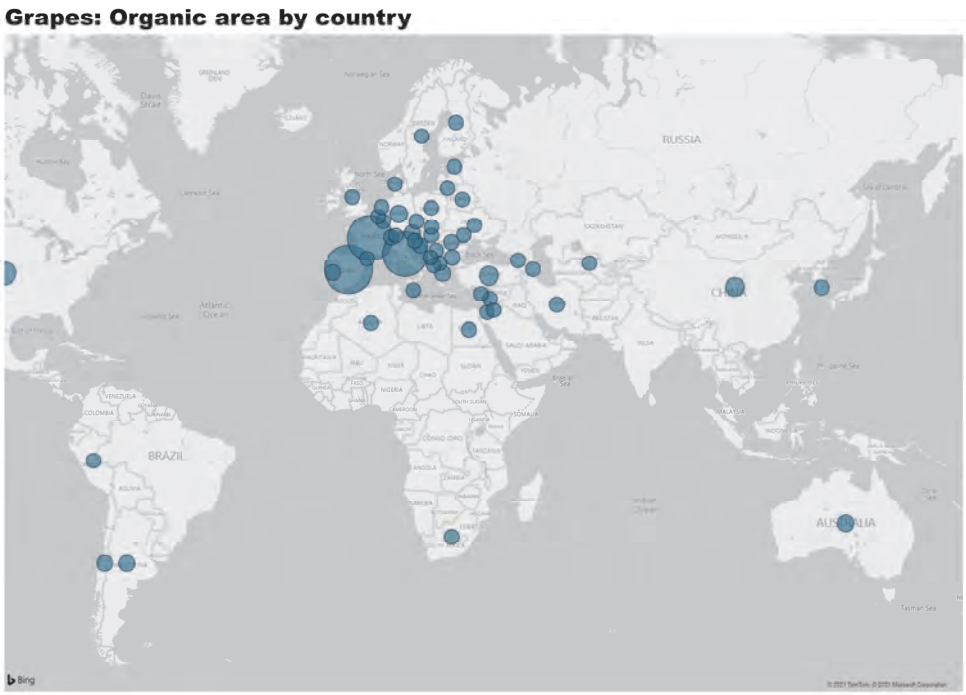


Figure 44: Grapes: Organic area 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments.

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

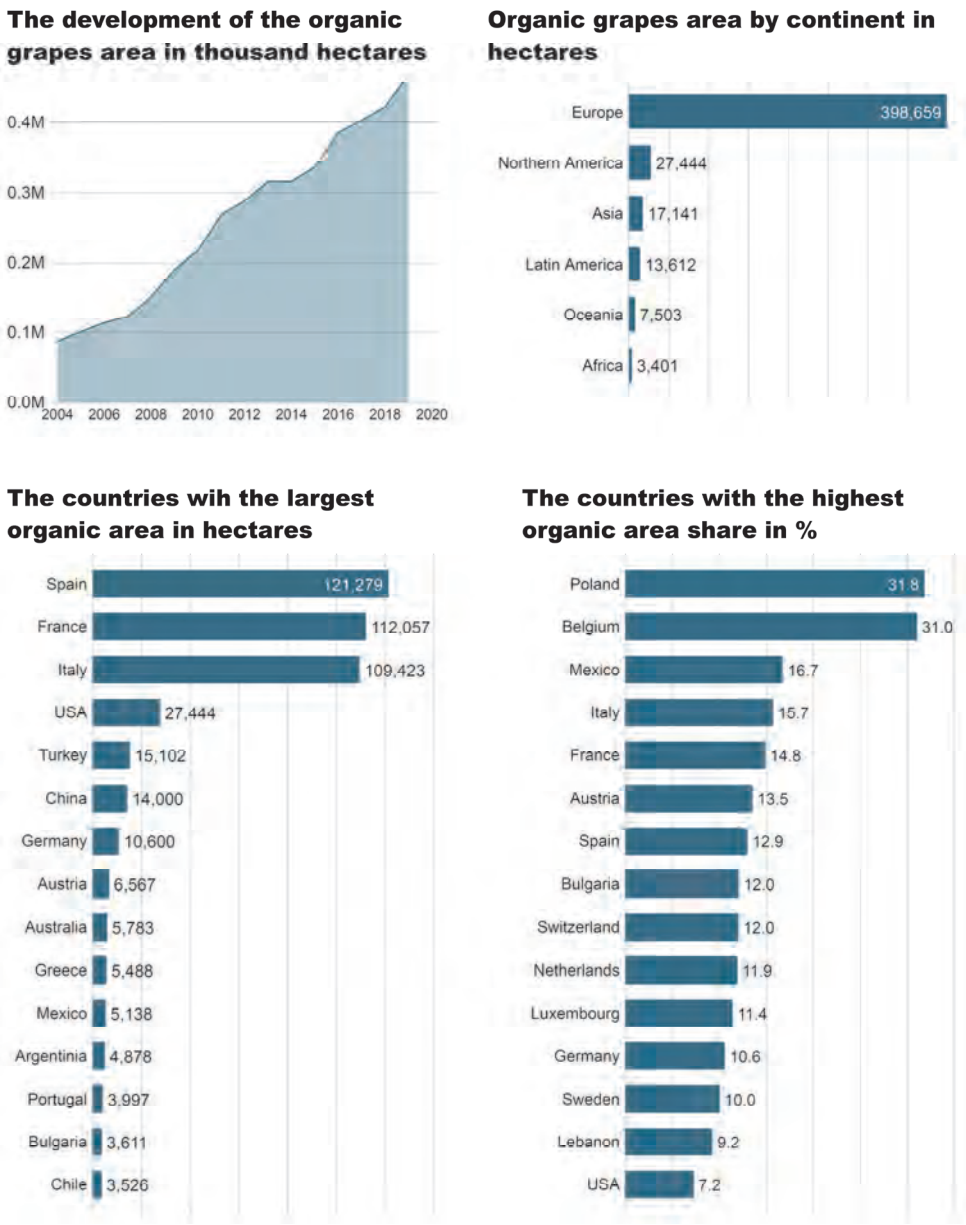


Figure 45: Grapes: Organic area 2019

Source: FiBL survey 2021, 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 2019

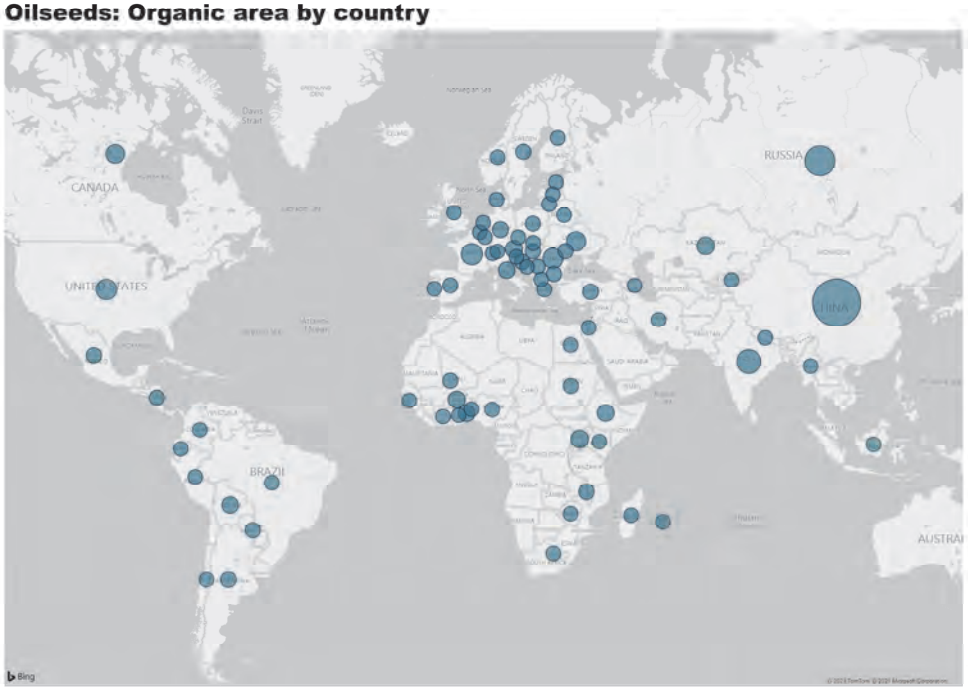
Country	Organic area [ha]	Organic area [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	3	0.0		3
Algeria	208	0.3	208	
Andorra	2	0.0	2	
Argentina	4'878	2.2		
Australia	5'783	4.3		
Austria	6'567	13.5		
Azerbaijan	41	0.3	1	40
Belarus	0	0.0		
Belgium	118	31.0	82	35
Bulgaria	3'611	12.0	2'967	644
Chile	3'526	1.7	3'526	
China	14'000	1.8	11'000	3'000
Croatia	1'072	5.4	908	164
Cyprus	262	3.9	245	17
Czech Republic	977	6.1	851	126
Denmark	55	0.0	31	24
Egypt	2'157	2.7	2'157	
Estonia	3	0.0	3	1
Finland	1	0.0	1	
France	112'057	14.8	68'506	43'551
Georgia	130	0.2	55	75
Germany	10'600	10.5		
Greece	5'488	5.4	4'283	1'204
Hungary	1'883	2.9	1'313	570
Iran	2'012	1.2	2'012	
Israel	80	1.0	48	32
Italy	109'423	15.7	83'825	25'599
Jordan	10	0.3		
Lebanon	713	9.2	651	62
Liechtenstein	4	0.0	4	
Lithuania	1	0.0	1	
Luxembourg	141	11.4	101	40
Malta	9	2.2	6	2
Mexico	5'138	16.7	5'138	
Moldova	18	0.0	4	13
Montenegro	0	0.0	0	
Netherlands	19	11.9	17	2
New Zealand	1'720	4.4		
North Macedonia	124	0.5		124
Peru	70	0.2		
Poland	235	31.8	177	59
Portugal	3'997	2.2	3'036	961
Republic of Korea	70	0.6		
Romania	2'790	1.6	1'644	1'145
Serbia	52	0.3	11	41
Slovakia	163	2.1	98	64
Slovenia	706	4.5	548	158
South Africa	1'036	0.9	762	274
Spain	121'279	12.9	99'386	21'893
Sweden	5	10.0	5	
Switzerland	1'737	12.0		
Turkey	15'102	3.6	9'273	5'829
Ukraine	56	0.1		5
UK	98	3.8	84	15
USA	27'444	7.2	27'444	
Uzbekistan	85	0.1	85	
World	**467'760**	**6.7**	**330'500**	**105'774**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317
Blank cells: Not data

› Oilseeds

In 2019, more than 1'676'000 hectares or 0.7 percent of the global oilseeds area was under organic management.

Oilseeds: Organic area by country



Oilseeds: Distribution of global organic oilseeds area by crop

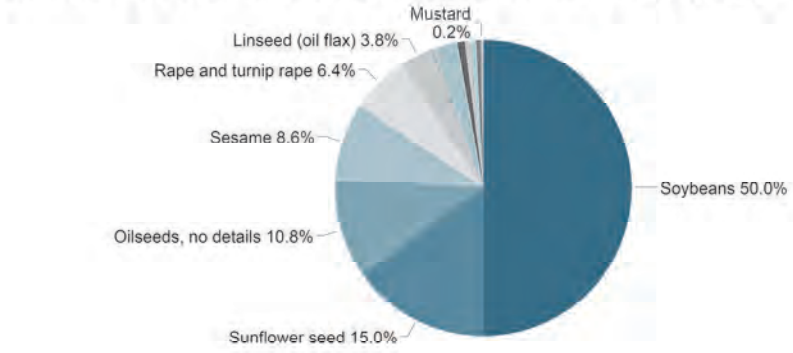


Figure 46: Oilseeds: Organic area 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments.

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

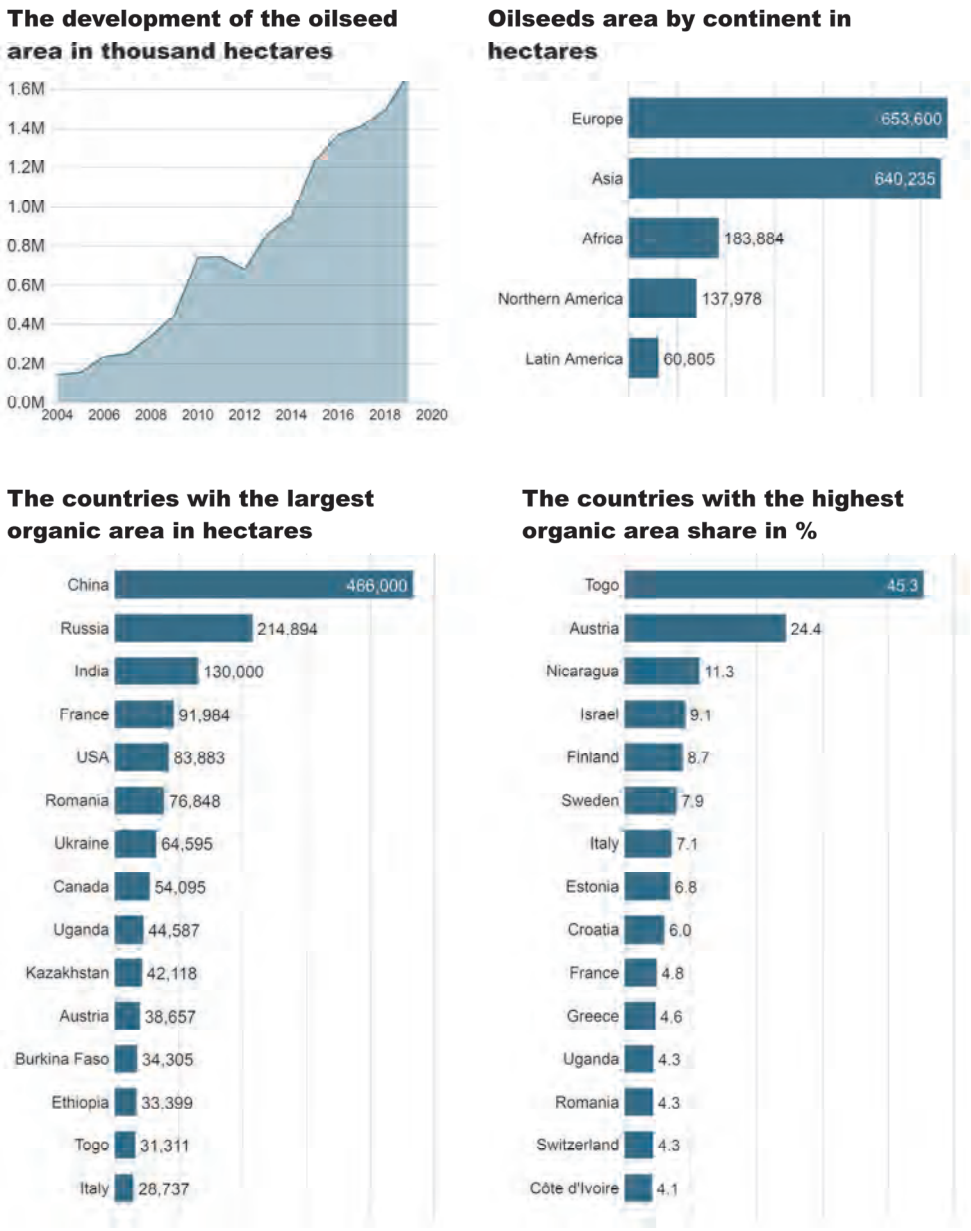


Figure 47: Oilseeds: Organic area 2019

Source: FiBL survey 2021, 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 2019

Country	Organic area [ha]	Organic area [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	12'333	0.1		
Austria	38'657	24.4		
Azerbaijan	126	0.5	50	76
Belarus	100	0.0		
Belgium	256	2.7	200	56
Benin	3'001	0.7		
Bolivia	24'671	1.6	22'650	2'021
Bosnia and Herzegovina	29	0.2	29	
Bulgaria	10'636	1.1	9'556	1'080
Burkina Faso	34'305	4.0	34'305	
Canada	54'095	0.4		
Chile	31	0.0	31	
China	466'000	2.3	394'000	72'000
Colombia	40	0.1	40	
Côte d'Ivoire	1'000	4.1	1'000	
Croatia	9'557	6.0	7'875	1'682
Czech Republic	2'434	0.5	1'308	1'126
Denmark	3'457	2.1	1'959	1'499
Ecuador	28	0.1	12	16
Egypt	1'761	1.4	1'761	
Estonia	5'243	6.8	4'706	538
Ethiopia	33'399	3.4	22'936	10'463
Finland	2'797	8.7	2'475	322
France	91'984	4.8	56'372	35'613
French Guiana (France)		0.0		
Germany	18'800	2.1		
Ghana	228	0.0	228	
Greece	4'959	4.6	2'917	2'043
Guinea-Bissau	27	0.1	27	
Hungary	11'780	1.2	10'280	1'500
India	130'000	0.5		
Indonesia	221	0.0	221	
Iran	650	0.2	650	
Israel	649	9.1	347	302
Italy	28'737	7.1	23'599	5'137
Kazakhstan	42'118	1.5		2'679
Kenya	715	0.4	1	714
Kyrgyzstan	4	0.0	3	1
Latvia	2'084	1.5	1'814	269
Liechtenstein	26	0.0	26	
Lithuania	7'279	2.9	7'034	245
Luxembourg	30	1.0	29	1
Madagascar	1'387	1.5	1'387	0
Malawi	11'996	2.0	11'996	
Mali	8'153	1.8	8'153	
Mexico	9'244	2.5	9'244	

Country	Organic area [ha]	Organic area [%]	Area fully converted [ha]	Area under conversion [ha]
Moldova	9'192	2.1	6'818	2'374
Myanmar	345	0.0	345	
Nepal	122	0.0		122
Netherlands	69	1.9	61	8
Nicaragua	6'389	11.3	4'639	1'750
Nigeria	4'581	0.1	4'581	
North Macedonia	23	0.5	16	7
Norway	72	2.2	52	20
Paraguay	7'783	0.2	7'783	
Peru	183	3.1		
Poland	4'292	0.5	1'551	2'741
Portugal	29	0.4	22	7
Réunion (France)	4	0.0	3	1
Romania	76'848	4.3	54'519	22'329
Russian Federation	214'894	1.6		179
Serbia	2'172	0.4	2'091	82
Slovakia	5'733	2.2	2'766	2'968
Slovenia	318	3.7	265	52
South Africa	219	0.0	209	10
Spain	10'544	1.3	8'353	2'192
Sudan	7'209	0.1	7'209	
Sweden	8'441	7.8	7'892	548
Switzerland	1'225	4.3		
Togo	31'311	45.3	30'410	901
Turkey	16'201	1.7	8'550	7'651'
Turkmenistan		0.0		
Uganda	44'587	4.3		
Ukraine	64'595	0.7		5'143
United Kingdom	107	0.0	16	91
USA	83'883	0.2	83'883	
Zimbabwe	3	0.0	3	
World	**1'676'502**	**0.7**	**871'255**	**188'558**

Source: FiBL survey 2021 based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317. Blank cells: no data.

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 2020."[2]

[2] Meier, C., Sampson, G., Larrea, C., Schlatter, B., Voora, V., Dang, D., Bermudez, S., Wozniak, J., and Willer, H. (2020). The State of Sustainable Markets 2020: Statistics and Emerging Trends. ITC, Geneva. Available at: https://vss.fibl.org/.
For interactive online graphics see the Sustainability Map at https://www.sustainabilitymap.org/trends

› Olives

In 2019, over 881'000 hectares or 8.4 percent of the global olive area was under organic management.

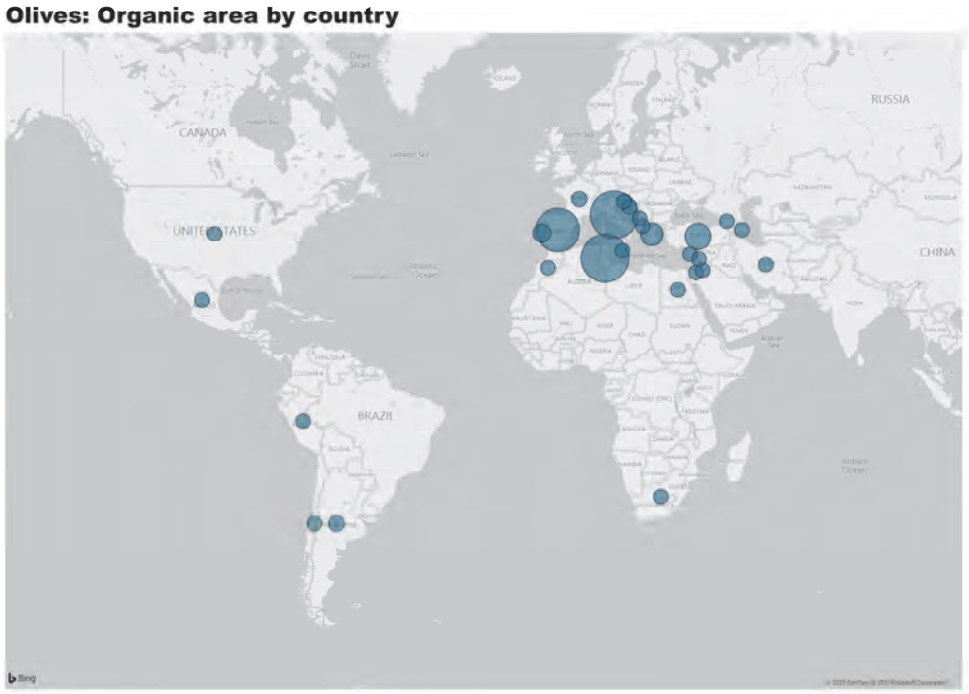


Figure 48: Olives: Organic area 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments.

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

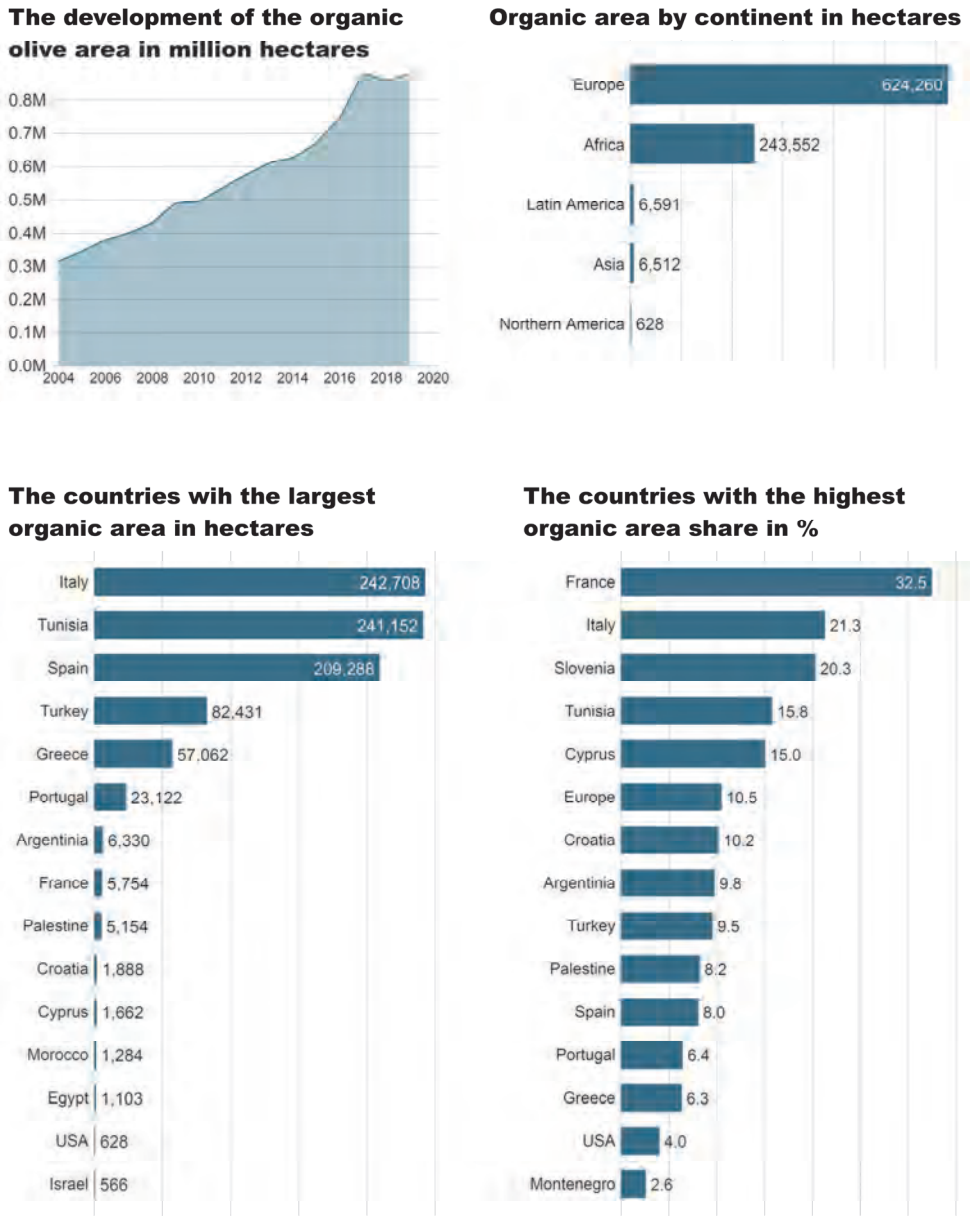


Figure 49: Olives: Organic area 2019

Source: FiBL survey 2021, 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 2019

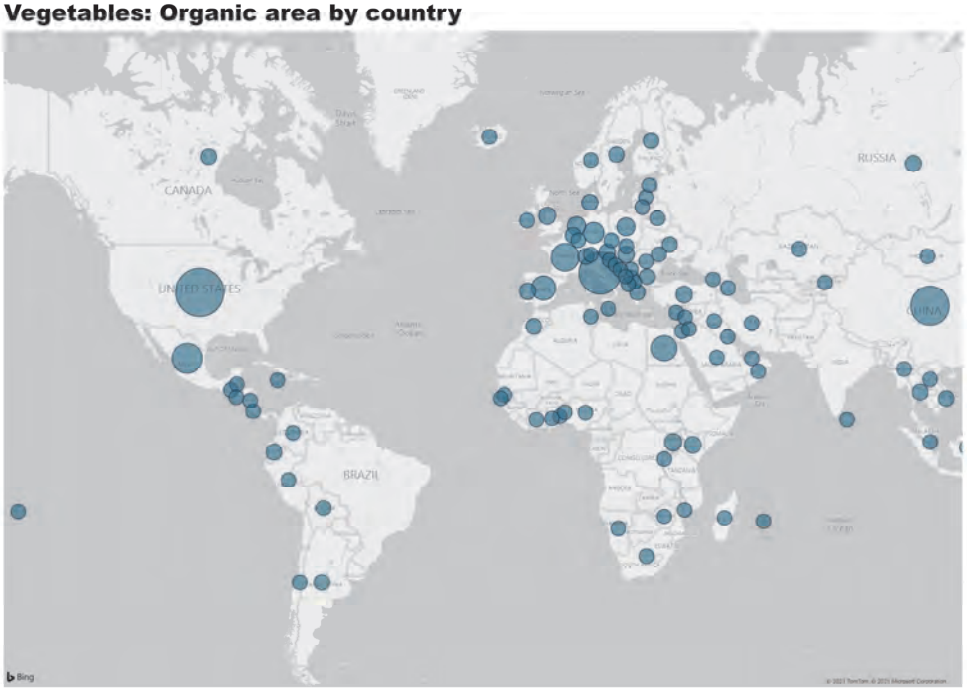
Country	Organic area [ha]	Organic area [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	50	0.1	41	9
Argentina	6'330	9.8		
Azerbaijan	13	0.4	5	8
Chile	146	0.7	146	
Croatia	1'888	10.1	1'503	385
Cyprus	1'662	15.0	1'532	130
Egypt	1'103	1.5	1'103	
France	5'754	32.5	4'324	1'430
Georgia	70	0.0		70
Greece	57'062	6.3	36'462	20'600
Iran (Islamic Republic of)	245	0.4	155	90
Israel	566	1.7	538	28
Italy	242'708	21.3	203'273	39'434
Jordan	356	0.6		
Lebanon	108	0.2	98	10
Malta	14	0.0	9	5
Mexico	40	0.8	40	
Montenegro	4	2.6	4	
Morocco	1'284	0.1	1'168	116
Palestine	5'154	8.2	4'317	837
Peru	74	0.3		
Portugal	23'122	6.4	21'023	2'099
Slovenia	278	20.3	232	46
South Africa	13	0.0	13	0
Spain	209'288	8.0	182'579	26'709
Tunisia	241'152	15.8	241'152	
Turkey	82'431	9.5	60'875	21'556
United States of America	628	4.0	628	
World	**881'543**	**8.4**	**761'220**	**113'561**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317
Blank cells: No data available.

› Vegetables

In 2019, over 433'000 hectares or 0.7 percent of the global fresh vegetable area was under organic management.

Vegetables: Organic area by country



Vegetables: Distribution of the global organic vegetable area by crop

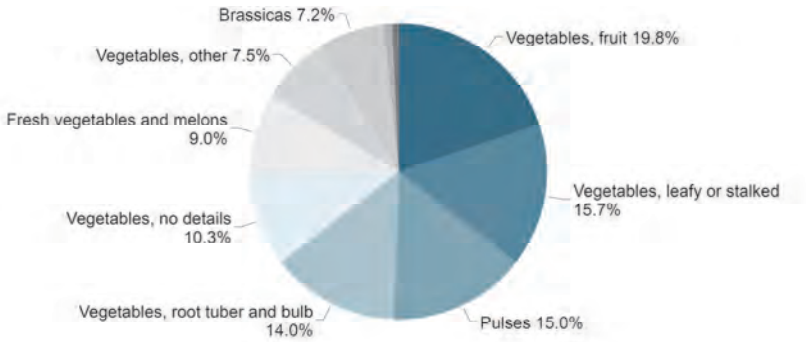


Figure 50: Vegetables: Organic area 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments.

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

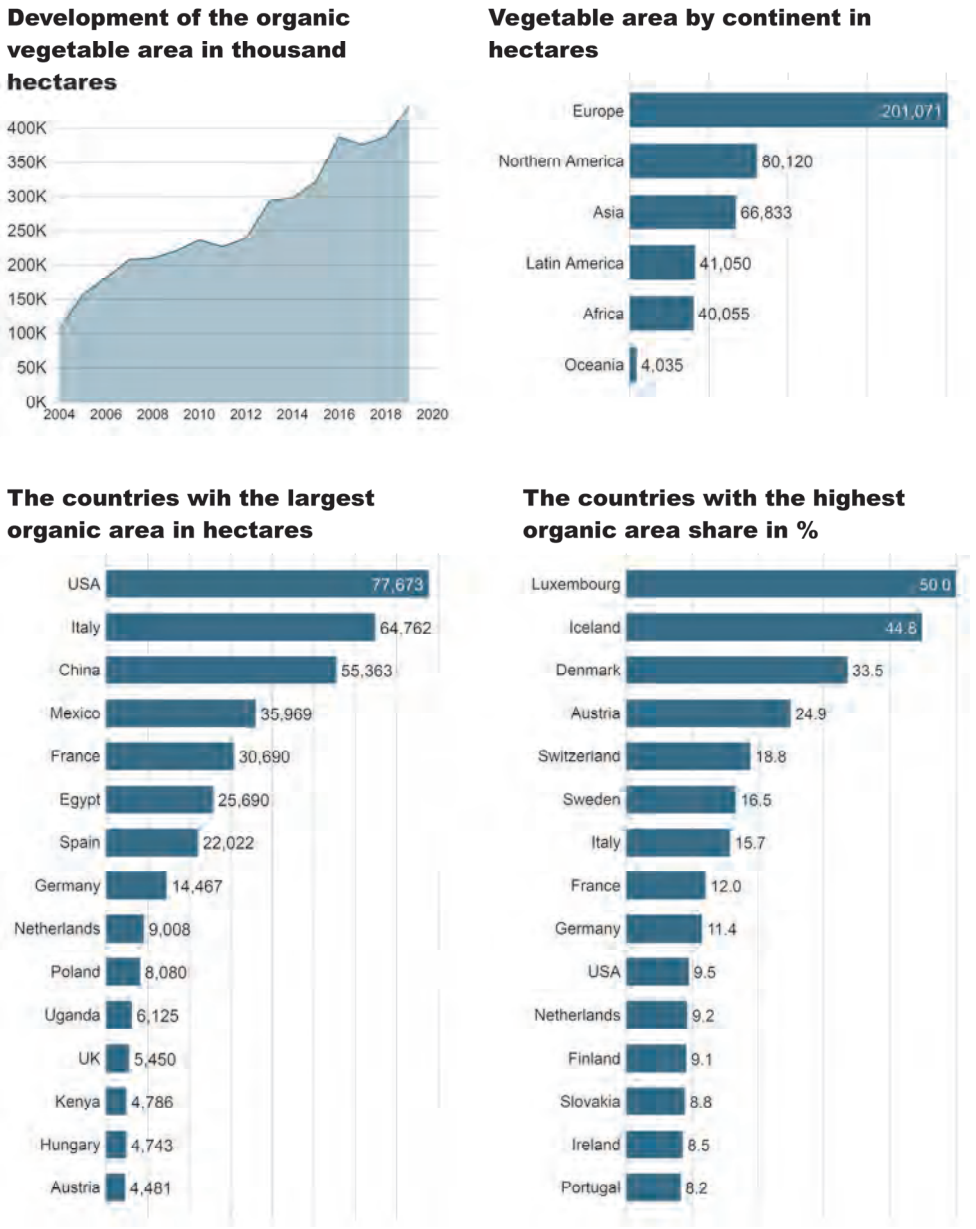


Figure 51: Vegetables: Organic area 2019

Source: FiBL survey 2021, 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 2019

Country	Organic area [ha]	Organic area [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	4	0.0		4
Argentina	1'114	0.5		
Australia	3'902	5.3	3'902	
Austria	4'481	24.9		
Azerbaijan	213	0.2	55	158
Belarus	159	0.3		
Belgium	2'934	4.4	2'717	217
Belize	36	1.7		
Benin	1	0.0		
Bolivia (Plurinational State of)	31	0.0	21	10
Bosnia and Herzegovina	9	0.0	9	
Bulgaria	2'433	6.9	2'121	311
Canada	2'447	3.2		
Chile	150	0.2	150	
China	55'363	0.2	38'143	17'220
Colombia	10	0.0	10	
Costa Rica	456	2.9	456	
Côte d'Ivoire	59	0.0	59	
Croatia	239	2.7	194	44
Cyprus	93	3.5	76	18
Czech Republic	339	3.2	277	62
Denmark	4'093	33.5	4'035	57
Ecuador	2'949	4.1	2'485	464
Egypt	25'690	3.4	25'690	
El Salvador	3	0.0	3	
Estonia	125	6.1	98	28
Finland	1'099	9.1	764	335
France	30'690	12.0	26'895	3'795
French Polynesia	25	4.2	25	
Gambia	1	0.0	1	
Georgia	8	0.1	8	
Germany	14'467	11.4		
Ghana	1	0.0	1	
Greece	2'353	3.4	1'688	665
Guatemala	147	0.1	147	
Hungary	4'743	5.2	3'265	1'479
Iceland	13	44.8	13	
Indonesia	123	0.0	123	
Iran (Islamic Republic of)	385	0.1	100	285
Iraq	53	0.0		
Ireland	367	8.5	287	80
Israel	733	1.0	727	6
Italy	64'762	15.7	53'093	11'669
Jamaica	57	0.3	56	0
Jordan	16	0.0		
Kazakhstan	923	0.4		
Kenya	4'786	2.6	4'786	
Kosovo	522	0.0	522	
Kuwait	23	0.5	23	
Kyrgyzstan	30	0.0	25	46
Lao People's Democratic Republic	47	0.0		
Latvia	424	5.0	399	24
Lebanon	59	0.2	59	0
Liechtenstein	13	0.0	13	
Lithuania	408	3.3	388	20
Luxembourg	55	50.0	54	
Madagascar	118	0.2	114	4
Malaysia	161	0.2	161	
Malta	5	0.3	4	

Country	Organic area [ha]	Organic area [%]	Area fully converted [ha]	Area under conversion [ha]
Mauritius	1	0.0	1	
Mexico	35'969	4.9	35'969	
Moldova	18	0.1	18	
Mongolia	27	0.3		27
Montenegro	1	0.0	0	1
Morocco	2'160	1.2	1'795	365
Mozambique	6	0.0	1	5
Myanmar	50	0.0	50	
Namibia	79	1.1	79	
Netherlands	9'008	9.2	8'843	165
Nicaragua	1	0.0	1	
Nigeria	105	0.0	100	
North Macedonia	347	0.7	126	221
Norway	373	5.1	367	6
Oman	16	0.1		
Palestine	13	0.1	6	7
Peru	128	0.1		
Philippines	5	0.0	5	
Poland	8'080	4.3	7'081	1'000
Portugal	3'945	8.2	3'778	166
Republic of Korea	310	0.1		
Romania	774	0.5	415	361
Russian Federation	3'535	0.5		5
Saudi Arabia	438	0.6	344	94
Senegal	163	0.3	163	
Serbia	171	0.2	132	39
Singapore	15	1.0	15	
Slovakia	624	8.8	523	100
Slovenia	298	4.6	242	57
South Africa	560	0.5	516	44
Spain	22'022	5.8	18'692	3'329
Sri Lanka	121	0.2	121	
Sweden	2'168	16.5	2'144	24
Switzerland	3'096	18.8		
Taiwan	2'930	2.0	2'930	
Thailand	2'693	0.6		
Togo	8	0.0		8
Tonga	108	1.5	108	
Tunisia	179	0.1	179	
Turkey	4'453	0.5	2'680	1'774
Uganda	6'125	2.4		
Ukraine	1'877	0.4		64
United Arab Emirates	23	0.2	21	1
United Kingdom	5'450	4.7	5'207	244
United States of America	77'673	9.5	77'673	
Viet Nam	2'057	0.2	1'981	76
Zimbabwe	14	0.0	14	
World	**433'165**	**0.7**	**346'561**	**45'184**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Organic Cotton[1]

LISA BARSLEY,[2] EVONNE TAN,[3] SUET YIN,[4] AMISH GOSAI[5] AND LIESL TRUSCOTT[6]

Global Trends

The significant growth in organic cotton production seen in 2017/18, when global fibre volumes rose 56 percent, continued into 2018/19 with a further 31 percent growth. Global production reached 239′787 metric tons (MT), which is just shy of the largest ever organic cotton harvest, seen in 2009/10, just before the financial crash that prompted a dramatic decline. Estimates show that the current growth trend will continue next year, though to a slightly lesser degree, with growth expected to be around ten percent.

Globally, an estimated 222′134 farmers were growing certified organic cotton in 2018/19, spread across 19 countries and 418′935 hectares of certified land. Although the number of countries growing organic cotton remained the same, the list changed slightly, with Senegal temporarily dropping out of certification, and Pakistan joining the line up with its first harvest of certified production in 2018/19.

The top seven countries producing organic cotton remained the same, although Tanzania jumped marginally ahead of the US as the sixth biggest producer. Ranked by production, the top seven producing countries were: India (51 percent), China (17 percent), Kyrgyzstan (ten percent), Turkey (ten percent), Tajikistan (five percent), Tanzania (two percent), and the US (two percent). These seven countries continue to account for the vast majority (97 percent) of global organic cotton.

India was by far the biggest contributor to the global growth seen in 2018/19, adding 37′138 MT to the worldwide total. Turkey was also a significant contributor, followed by Tajikistan, China and Uganda. India and Pakistan had the most land in conversion to organic in 2018/19, with 23′251 ha and 17′632 ha, respectively, followed by Turkey, Greece, and Tajikistan.

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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 2020 Organic Cotton Market Report is available here: https://store.textileexchange.org/product/2020-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

[2] Lisa Barsley, Materials Program Manager, Textile Exchange, UK

[3] Evonne Tan, Data Management & China Strategy Director, Textile Exchange, Malaysia

[4] Suet Yin Siew, Senior Data Analyst & Statistician, Textile Exchange, Malaysia

[5] Amish Gosai, South Asia Manager, Textile Exchange, India

[6] Liesl Truscott, European and Materials Strategy Director, Textile Exchange, UK

Development of organic cotton fibre production
Source: Textile Exchange Organic Cotton Market Report 2020

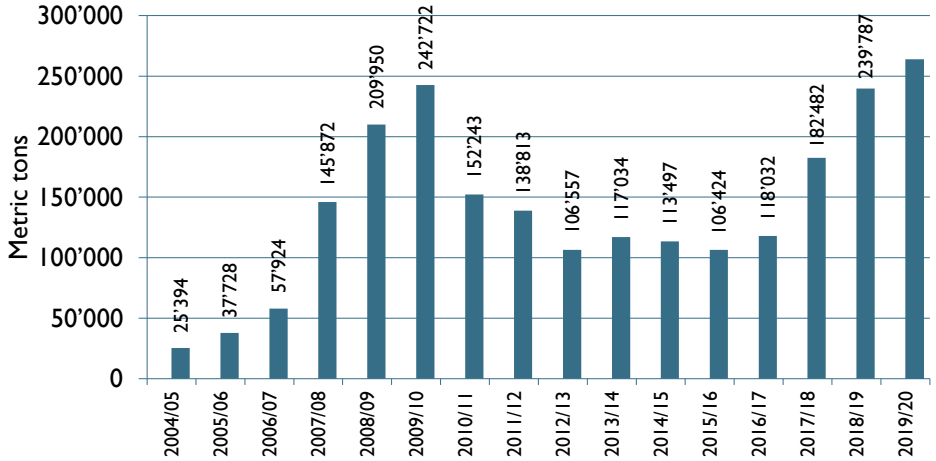

Figure 52: Development of organic cotton fibre production in metric tons

Source: Textile Exchange Organic Cotton Market Report 2020; Estimate for 2019/2020

Geography of production

Though a total of 19 countries grew certified organic cotton in 2018/19, 97 percent of production stemmed from just seven countries: India (51 percent), China (17 percent), Kyrgyzstan (10 percent), Turkey (10 percent), Tajikistan (5 percent), the United States (2 percent) and Tanzania (2 percent).

The remaining three percent was produced by Uganda (1.08 percent), Greece (0.49 percent); Benin (0.42 percent); Peru (0.23 percent); Burkina Faso (0.19 percent); Pakistan (0.17 percent); Egypt (0.12 percent); Ethiopia (0.05 percent); Brazil (0.04 percent); Mali (0.03 percent); Argentina (0.005 percent); and Thailand (0.003 percent).

See Table 37 for more detail on country-level production, or read on for region-level summaries.

Africa

Countries producing organic cotton in Africa in 2018/19 included Ethiopia, Tanzania and Uganda in the East, and Benin, Burkina Faso, and Mali in the West. A total of 9'527 metric tons of organic cotton fibre was produced on 51'576 hectares by 46'264 farmers across Africa. This represents a fibre production growth of 35 percent over the previous season, and Africa currently accounts for four percent of global organic cotton production. An additional 1'661 hectares of cotton-growing land were in conversion to organic in Tanzania.

Organic Cotton

Table 37: Organic cotton farmers, area and production 2018/2019[1, 2]

Region	Country	No. of farmers	Certified organic land area [ha]*	Organic seed cotton [MT]	Organic cotton fibre [MT]	Share of global organic fibre prod. [%]	Total in-conversion land area [ha]
Africa	Benin	4'402	3'879	2'473	998	0.42	-
	Burkina Faso	7'027	2'726	1'098	453	0.19	-
	Ethiopia	200	174	364	130	0.05	-
	Mali	3'506	7'900	228	84	0.03	-
	Senegal	-	-	-	-	-	-
	Tanzania	10'729	26'608	13'144	5'281	2.20	1'661
	Uganda	20'400	10'290	6'401	2'581	1.08	-
Africa Total		***46'264***	***51'576***	***23'709***	***9'527***	***3.97***	***1'661***
China		1'279	19'464	108'808	41'247	17.20	710
Middle East & Central Asia	Egypt	18	219	776	287	0.12	-
	Greece	-	1'460	3'540	1'168	0.49	2'592
	Kyrgyzstan	220	12'852	59'093	23'637	9.86	103
	Tajikistan	955	8'114	30'446	12'178	5.08	2'226

[1] Please note that the land area figures reported by Textile Exchange refer to total land area certified to an organic standard by a producer group growing organic cotton. The same piece of land could be, and increasingly is being, used to grow other organic crops in addition to cotton as part of a rotation system; a fundamental element of organic agriculture. This means that reported land area figures do not necessarily reflect the land area used to grow only organic cotton and, as a result, may seem disproportionately high compared to the organic cotton volumes harvested.

[2] Please also note that some organic cotton farmers are involved in group certification under ICS (Internal control system), so not all land listed is necessarily allocated to organic cotton, or not all farmers listed are necessarily under organic cotton cultivation. The figures might also include land/farmers in-conversion to organic.

Region	Country	No. of farmers	Certified organic land area [ha]*	Organic seed cotton [MT]	Organic cotton fibre [MT]	Share of global organic fibre prod. [%]	Total in-conversion land area [ha]
	Turkey	384	10'668	55'759	22'839	9.52	6'148
Middle East & Central Asia Total	***1***	***1'577***	***33'313***	***149'614***	***60'110***	***25.07***	***11'069***
Latin America	Argentina	32	100	27	11	0.00	-
	Brazil	1'903	2'072	280	97	0.04	527
	Peru	184	663	1'486	558	0.23	745
Latin America Total	***Latin America Total***	***2'119***	***2'835***	***1'793***	***666***	***0.28***	***1'272***
	India	166'767	302'863	349'786	122'668	51.16	23'251
	Pakistan	4'003	781	1'172	398	0.17	17'632
	Thailand	46	46	17	6	-	-
	Myanmar	13	8	-	-	-	8
South Asia Total	***South Asia Total***	***170'829***	***303'698***	***350'975***	***123'072***	***51.32***	***40'892***
USA	USA Total	66	8'050	14'756	5'165	2.15	230
Total	***Global total***	***222'134***	***418'935***	***649'656***	***239'787***	***100.00***	***55'833***

Source: Textile Exchange Organic Cotton Market Report 2020

Global Market

Organic Imports

The Global Market for Organic Food & Drink[1]

BY AMARJIT SAHOTA[2]

Introduction

The coronavirus pandemic is described as a multi-layered crisis with health, social and economic impacts. Since it began in spring 2020, it has been having a profound impact on our lives. It is also elevating consumer demand for organic foods.

Organic food sales are seeing an uplift during the coronavirus pandemic. Retailers across the globe are reporting significant sales increases since the virus outbreak in March. Consumers are turning to organic foods as they look more closely at personal health, wellness and nutrition.

Ecovia Intelligence predicts demand will continue to follow the positive trajectory in the coming years. Previous health and food scares have caused an initial spike in organic food sales, followed by sustained demand. The current crisis is, however, likely to have long-term ramifications. Sustainability issues, such as food security, transparency and supply chain integrity, are likely to become more prominent. Organic, as the most sustainable form of agriculture, is likely to benefit as the food industry makes the transition to a post-COVID world.

Global market overview

International sales of organic food and drink reached 112 billion US dollars in 2019. The market has expanded by 55 percent since 2013.[3]

Figure 53 shows that although North America and Europe generate most sales, their share (roughly 90 percent) is shrinking. The two regions generated 97 percent of global sales in 2000. The coronavirus crisis is predicted to accelerate this trend as more regional markets for organic foods develop. In particular, the share of developing countries such as China, India, Brazil and Indonesia is likely to grow at a fast rate in the coming years.

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[1] This chapter has been prepared by Ecovia Intelligence (formerly known as Organic Monitor) from its ongoing research on the Global Market for Organic Food & Drink. No part of this chapter maybe reproduced or used in other commercial publications without written consent from Ecovia Intelligence. To request permission, write to Ecovia Intelligence, 79 Western Road, London W5 5DT, UK, Tel. +44 20 8567 0788, e-mail services@ecoviaint.com, www.ecoviaint.com

[2] Amarjit Sahota, President of Ecovia Intelligence, Ecovia Intelligence, 79 Western Road, London W5 5DT, UK, www.ecoviaint.com

Amarjit Sahota is the Founder and President of Ecovia Intelligence (formerly Organic Monitor), a specialist research, consulting & training firm that focuses on global sustainable product industries. More details are on www.ecoviaint.com

[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.

Figure 53: Growth in Global Organic Food Sales by Leading Regions, 2000-2019

Source: Ecovia Intelligence

Coronavirus impact

The global COVID-19 pandemic is creating a demand surge for organic foods. According to Nielsen, US organic food sales increased by 25 percent in the 17 weeks prior to July 2020. In the UK, organic food sales rose by 18 percent in the 12 weeks before June.

Consumers are turning to organic products as they look to boost their personal immunity. Since organic foods avoid synthetic pesticides, fertilisers, growth promoters and related agro-chemicals, they are considered healthier and safer than conventional foods.

Organic food retailers have benefited from the emergency measures (lockdowns or circuit-breakers) introduced by national governments. Organic food and health food shops have remained open during the crisis, attracting new shoppers to their stores whilst existing customers are spending more. In France, organic food shops like Biocoop and Naturalia reported sales increases of over 30 percent since the crisis started.

Online retailers are reporting the highest sales growth. The pandemic has encouraged many consumers to shop from home. In the UK, analysts predicted online grocery sales will increase by a quarter in 2020. Amazon is widely tipped to be a major winner of the current crisis, expected to report record sales and profits. Its subsidiary Whole Foods Market is also benefiting from the shift to online sales. In April, the natural and organic food retailer was limiting the number of its online grocery customers because of unprecedented demand.

Organic vegetable box scheme operators are also reporting a sales surge. Abel & Cole, the leading operator in the UK, reported a 25 percent increase in sales orders in March

2020. It delivers over 55'000 food boxes a week. Riverford, another organic vegetable box scheme company, also showed a demand spike.

Online organic food retailers in Asia also reported the same trend. Nourish Organic, an Indian online retailer, experienced a 30 pcercent sales rise in March 2020. Greenheart Organic Farms and Koita Milk in the United Arab Emirates (UAE) observed a three-fold increase in home deliveries.

The coronavirus crisis has also brought supply issues. Many organic food companies have international supply networks that have come under pressure. Many of the raw materials used by organic food companies in Europe and North America are produced in other regions. Lockdowns have disrupted supply chains. For instance, India is a major source of organic tea, herbs, spices and related ingredients. Emergency measures introduced by the Indian government halted food processing and exports. The virus outbreak has led many companies to look at diversifying their source bases.

Implications of COVID-19

The coronavirus pandemic is likely to change the global organic food industry in six major ways:

i. De-globalisation of food supply chains

Some argue that COVID-19 has put the brakes on globalisation. The pandemic has highlighted the vulnerabilities of international supply chains. The supply of raw materials was disrupted as countries entered emergency measures. For instance, some countries halted exports of agricultural products as they entered lockdowns. The flow of organic ingredients continues to be adversely affected by higher freight and transportation costs and longer delivery times. Organic food companies and ingredient firms have set up international supply chains for their raw materials. COVID-19 has shown that winners in the current crisis are those that have kept their supply chains close to home. Operators that are reliant on organic ingredients from other geographic regions have been the most negatively affected. The way forward appears to be more local – if not, regional – supply chains.

ii. Food security

The pandemic has also re-iterated the importance of food security. Seeing the frailties of their supply chains, some national governments focused on keeping food supply networks moving during the crisis. Countries like Singapore and the United Arab Emirates ensured there was no disruption to food imports during the crisis. Expect to see more governments invest in domestic farming and food production in the coming years. Access to safe, sufficient and nutritious food is likely to rise on the political agenda. Organic food production is likely to play an important role, considering there is growing acceptance of its environmental and health benefits. Asian and African countries that have traditionally focused on export-oriented organic food industries will look to developing internal markets.

iii. Government support

The previous two trends are likely to be accelerated by government support. National governments are expected to invest more in organic farming as they look to make their food industries more resilient. Organic farming will also be encouraged as countries

look to reduce pesticide usage and improve soil fertility. In May 2020, as part of the European Green Deal, the EU announced the target of reaching 25 percent of farmland organic by 2030. The EU's farm to fork strategy aims to improve food security in Europe. The strategy plans to reduce the environmental impact of the European food system, reduce chemical pesticide use by 50 percent, hazardous pesticide use by 50 percent, fertiliser use by 20 percent and nutrient losses by 50 percent by 2030.

iv. Transparency and traceability

The move towards traceability and transparency in supply chains of agricultural products is expected to gain impetus. As supply of organic ingredients/products becomes tighter, risks of fraud and adulteration increase. Traceability tools will be deployed to maintain the integrity of organic products. Blockchain technology is expected to play a key role. Carrefour, Europe's largest supermarket chain, is already using blockchain to provide transparency for some of its private label organic products. The Thai government is also planning to use blockchain to promote its organic rice in export markets.

v. Changing consumer behaviour

COVID-19 is arguably having the most impact on us as consumers, changing the way we shop and eat. From initial panic-buying and stockpiling to less frequent shopping visits and online purchasing, the coronavirus is causing a major shift in consumer attitudes and behaviour. Organic food sales are rising during the crisis. However, demand for plant-based foods, nutritional supplements, and natural products is also increasing. Consumers are turning to health and wellness products as they look more closely at disease prevention and maintenance. The challenge for the industry is to ensure organic product sales meet the needs of changing consumer behaviour. Organic dairy product sales have already been adversely affected by the rise of plant-based products. Organic meat sales could suffer the same fate if consumers do not associate them with ethics and nutrition.

vi. Food retailing

Online retailers are clear winners of the current crisis. Amazon, along with Whole Foods Market, has capitalised on the shift to home shopping. Online retailers are expected to take a bigger chunk of organic food sales in the coming years. Large conventional grocery chains and dedicated organic food online retailers will gain market share. Organic food retailers, especially those in Europe and Asia, will need to adapt. The growing purchasing power of millennials and Gen Z is expected to accelerate this trend.

Conclusions

Organic foods were first introduced on a large-scale in the early 1990s. It took over 15 years for global organic product sales to reach 50 billion US dollars in 2008. Ten years later (2018), they surpassed the 100 billion US dollar mark. With COVID-19 changing the way we shop and eat, the next leap to 150 billion US dollars could possibly be within the next few years.

Imports of Organic Agri-food Products into the European Union – Summary of the EU Agricultural Market Brief on EU Organic Imports 2019[1]

This is a summary prepared by FiBL of the EU Agricultural market brief "EU imports of organic agri-food products - Key developments in 2019" published by the European Commission, DG Agriculture and Rural Development.

The present brief describes data on EU organic imports[2] of agri-food products in 2019 and reflects on key developments compared to 2018. It characterises these imports in terms of origin and destination, as well as product categories.

Organic agri-food import volumes by EU member state 2018 and 2019
Source: Traces/European Commission 2020

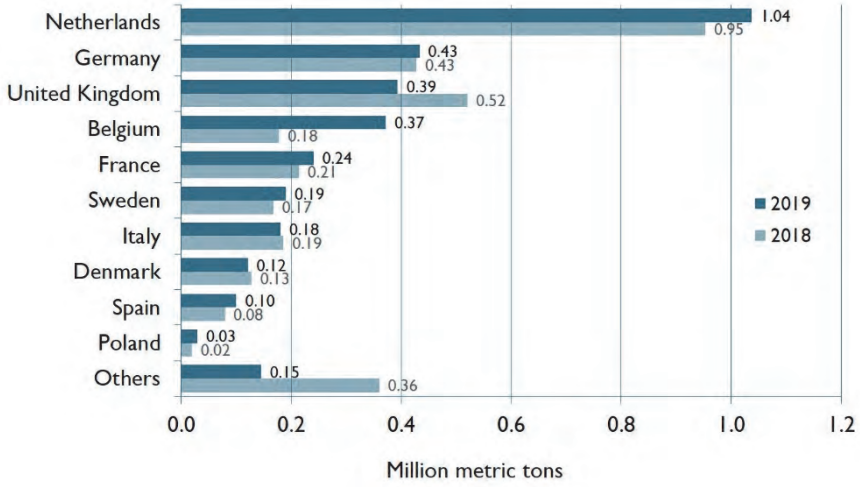


Figure 54: Organic agri-food import volumes by import country

Source: Traces/European Commission 2020

In 2019, the EU imported 3.24 million metric tons (MT) of organic agri-food products. This represents a negligible increase compared to the 3.23 million metric tons imported in 2018 (+0.4 percent). Almost one-third of the 2019 organic imports into the EU were imported by the Netherlands (32 percent). Other EU Member States that imported a significant share of organic products include Germany (13 percent), the UK (12 percent)

[1] European Commission (2020): EU imports of organic agri-food productsKey developments in 2019. EU Agricultural Market Briefs No 17, June 2020. https://ec.europa.eu/info/sites/info/files/food-farming-fisheries/farming/documents/market-brief-organic-imports-june2020_en.pdf

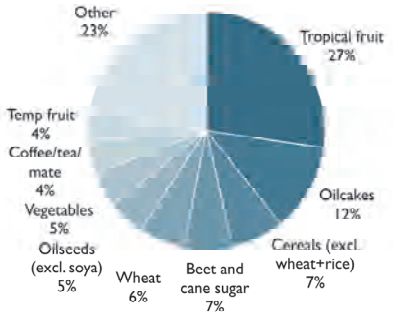
[2] These data include the 28 countries that were member states of the European Union in 2019.

and Belgium (11 percent). Organic imports in Member States which joined the EU after 2004 remain minor at slightly more than 3 percent (Figure 54, Table 42).

Main trade partners for organic imports include China, Ukraine, Dominican Republic and Ecuador

Seventy percent of EU organic imports came from ten countries (Figure 55, Table 43).

European Union: Distribution of organic agri-food imports by aggregated product category 2019
(based on export volume in MT)
Source: Traces/European Commission



European Union: Distribution of organic agri-food imports by country 2019
(based on organic import volume in MT)
Source: Traces/European Commission

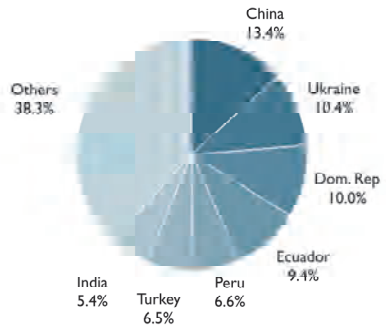


Figure 55: Share (%) of total organic agri-food import volumes by product groups (left) and export country (right) 2019

Source: Traces/European Commission 2020

Together, these ten countries increased their exports to the EU substantially, by 13 percent. In comparison with 2018, the United States and the United Arab Emirates lost their ranking in the top ten and were replaced by Colombia and Kazakhstan.

Imports from China include mainly organic oilcakes (75 percent), while Ecuador, the Dominican Republic and Peru supply the EU with organic tropical fruit, nuts and spices. Organic cereals (including wheat, excluding rice) is the main imported product from Ukraine, Turkey and Kazakhstan, and organic sugar is the number one from Brazil and Colombia.

Key imported organic products

Tropical fruit still on top of imported products

The ten most imported product categories represent 82 percent of total organic import volumes in 2019 (Figure 55). First come tropical fruit, nuts and spices with 27 percent (0.9 million MT), followed by oilcakes with 12 percent (0.4 million MT), cereals other than wheat and rice, and beet and cane sugar (both 7 percent, 0.2 million MT) (Figure 55, Table 44).

Compared to 2018 organic imports, a significant increase was observed in the volume imported of tropical fruit, nuts and spices (+13 percent), oilcakes (+13 percent), sugar

(+29 percent), vegetables (+8 percent), unroasted coffee, tea and maté (+11 percent) and soybeans (+25 percent). Also, for the first time, a very small volume of organic cheese was imported in 2019 (1.2 MT).

The remaining top-ten product categories decreased compared to the previous year: cereals other than wheat and rice (-8 percent), wheat (-16 percent), oilseeds other than soybeans (-17 percent), fruit other than citrus or tropical fruit (-8 percent).

Almost one-fifth of imported olive oil estimated to be organic

For some of the products categories, organic imports are estimated to represent a significant share of total imports. In particular, for olive oil, almost 20 percent of imports are estimated to be organic. For the other product categories, organic imports represent up to a maximum of 10 percent of total imports, and for the large majority, less than 5 percent. Overall, organic agri-food imports are estimated to represent about 2 percent of the total volume of agri-food imports (Table 44).

Imports of organic cereals, oilseeds, sugar and derived products[1]

Close to half of the imported organic products pertain to the arable crop product categories or to their derivatives (45 percent or 1.5 million metric tons) (Table 38).

Table 38: Organic cereals, oilseeds and sugar import volumes for key product categories, 2018 and 2019 (thousand MT)

	2018 Imports (1000 MT)	2019 Imports (1000 MT)	Change (%)
Oilcakes	342	386	13.0
› *of which soybean meals*	*305*	*357*	*16.5*
Cereals, other than wheat and rice	254	233	-8.3
› *of which maize*	*224*	*208*	*-7.3*
Beet and cane sugar	166	214	28.9
Wheat	242	204	-15.7
Oilseeds, other than soybeans	193	160	-16.8
› *of which sunflower*	*103*	*58*	*-43.4*
› *of which linseed*	*29*	*27*	*-5.4*
› *of which rapeseed*	*17*	*22*	*30.9*
› *of which sesamum seed*	*15*	*19*	*23.6*
Soybeans	106	132	24.8
Rice	216	71	-67.4
Palm & palm kernel oils	40	41	2.4
Flours and other products of the milling industry	20	19	-5.0
Vegetable oils other than palm & olive oils	10	13	28.1

Source: Traces/European Commission 2020

Of these, oilseeds, oilcakes and vegetable oils cover slightly more than 0.7 million MT (50 percent), with the largest category being oilcakes (of which 92 percent are soybean

[1] The analysis covers only the largest product categories listed in Table 38. It does not include imports of other organic derived products such as starches, pasta, pastry, biscuits and bread, or ethanol, for which imports remain limited.

meals). Oilcakes are an important feed component for EU livestock production, in particular for organic pig meat and poultry. A further 0.5 million MT is composed of cereals and flours (36 percent), mainly wheat and maize. The remaining 0.2 million MT is sugar (15 percent).

Imports of organic oilseeds and derivative products increased on average by 6 percent in 2019. Among these product categories, only imports of oilseeds other than soybeans decreased compared to 2018. For cereals (including wheat and rice), organic imports show a decline over all product categories, resulting in an average decrease of 28 percent in 2019 imports. With regard to sugar, an additional volume of 29 percent was imported.

Over 80 percent of organic oilcakes are imported from China. With regard to oilseeds, important origins include China, Ukraine and India, as well as Togo for soybeans and Turkey for other oilseeds. The vast majority of organic cereals (excluding rice) are imported from Ukraine (32 percent of wheat, 77 percent of other cereals) and Turkey (22 percent of wheat, 11 percent of other cereals) as well as from Kazakhstan for wheat (31 percent). Pakistan and India are the main origin countries of imported organic rice (respectively 36 percent and 25 percent of total organic rice imports). Three-quarters of organic sugar is imported from four countries: Brazil (27 percent), Colombia, India (both 18 percent) and Paraguay (14 percent).

Imports of organic fruit and vegetables

Fruit and vegetables is the second largest category of imported organic products, with 1.35 million MT imported in 2019 (42 percent of total organic imports). The largest share is composed of tropical fruit, nuts and spices (66 percent) which include mainly bananas (85 percent of tropical fruit) (Table 39).

Imports of organic fruit and vegetables increased by 8 percent in 2019. A particularly strong increase is observed in imports of tropical fruit, nuts and spices, with 2019 imports close to 0.9 million MT (+13 percent). Two categories show, however, a decrease compared to the previous year: fruit other than exotic and citrus fruit (-8 percent) and fruit juices (-3 percent).

Organic tropical fruit, nuts and spices are imported mainly from the Dominican Republic (34 percent of total, equal to 0.3 million MT), Ecuador (31 percent) and Peru (15 percent). Almost half of the imported organic citrus fruit originates from South Africa (46 percent), while other organic fruits come from mainly from Turkey (25 percent) and Argentina (17 percent). Half of the organic fruit juices imported come from Turkey and Mexico (both 25 percent). Middle Eastern countries are the main origin of organic vegetables, including Egypt (26 percent), Israel (22 percent) and Turkey (17 percent). For preparations of vegetables, fruit or nuts, none of the origin countries export significantly more to the EU than the others.

Table 39: Organic fruit and vegetables import volumes by product category, 2018 and 2019 (thousand MT)

	2018 Imports (1000 MT)	2019 Imports (1000 MT)	Change (%)
Tropical fruit, fresh or dried, nuts and spices	785	886	12.8%
› *of which bananas*	*654*	*749*	*14.6%*
Vegetables, fresh, chilled and dried	147	159	7.9%
› *of which dried leguminous*	*58*	*58*	*1.3%*
› *of which potatoes*	*33*	*28*	*-16.1%*
› *of which onions, shallots and garlic*	*13*	*27*	*115.5%*
Fruit, fresh or dried, excl. citrus & tropical fruit	146	134	-8.5%
› *of which apples and pears*	*59*	*38*	*-36.3%*
› *of which grapes*	*20*	*22*	*11.0%*
Fruit juices	89	87	-2.8%
› *of which orange juice*	*32*	*30*	*-4.6%*
› *of which apple juice*	*30*	*24*	*-20.1%*
Preparations of vegetables, fruit or nuts	55	57	3.9%
› *of which preparations of fruit*	*50*	*51*	*1.0%*
Citrus fruit	29	30	2.7%
› *of which lemons*	*16*	*16*	*5.9%*
› *of which oranges*	*8*	*7*	*-4.3%*
Total	**1'252**	**1'352**	**8.0%**

Source: Traces/European Commission 2020

Imports of organic permanent crops (excluding fruit and nuts)

Besides organic fruit and nuts, a further 260'000 MT of organic permanent crops (and their derivatives) are imported (Table 40). This includes in particular unroasted coffee, tea in bulk and maté (54 percent), of which 92 percent is coffee, as well as cocoa beans (25 percent). Organic imports under these product categories increased slightly in 2019 compared to 2018 (+3 percent). While unroasted coffee, tea in bulk and mate increased by 11 percent, imports of cocoa beans showed a similar percentage decrease.

Table 40: Organic permanent crops (excl. fruit and nuts) import volumes by product category, 2018 and 2019 (thousand MT)

	2018 Imports (1000 MT)	2019 Imports (1000 MT)	Change (%)
Unroasted coffee, tea in bulk & maté	127	141	11.1
› *of which coffee*	117	130	11.6
Cocoa beans	74	66	-11.3
Olive oil	30	34	11.6
Wine, vermouth, cider and vinegar	21	20	-5.3
› *of which wine*	19	19	2.3
Roasted coffee and tea	0.8	0.9	13.4
Total	**253**	**262**	**3.3**

Source: Traces/European Commission 2020

Unroasted coffee is largely imported from Peru and Honduras: Peru and Honduras together represent 58 percent of the coffee exports (respectively 32 percent and 26 percent). Cocoa beans come from the Dominican Republic (37 percent), Peru (20 percent) and Sierra Leone (17 percent). Tunisia is the sole exporter of organic olive oil to the EU. Chile and Argentina each export about a third of the organic wine, vermouth, cider and vinegar to the EU, and further quantities are imported mainly from South Africa and Australia.

Imports of organic animal products

Honey is the main imported organic animal product. Imports in 2019 remained stable compared to the previous year around 18 000 MT. Besides honey, imports of organic animal products in the EU are negligible and together represent less than 1'000 MT in 2019 (Table 41).

China, Mexico and Brazil are the main exporting countries of eggs and honey to the EU. Bovine meat and non-edible animal products are imported mainly from Uruguay. Organic sheep and goat meat originates from New Zealand. The 1 MT of cheese is imported from the United States.

Table 41: Organic animal product import volumes by product category, 2018 and 2019 (MT)

	2018 Imports (MT)	2019 Imports (MT)	Change (%)
Eggs and honey	17'808	18'032	1.3
› *of which honey*	*17'693*	*17'901*	*2.6*
Bovine meat, fresh, chilled and frozen	666	486	-27.1
Non edible animal products	453	233	-48.4
Sheep and goat meat, fresh, chilled and frozen	132	71	-46.3
Cheese	0	1	N.A.
Pork meat, fresh, chilled and frozen	19	0	N.A.
Butter	0.2	0	N.A.
Total	**19'079**	**18'823**	**-1.3**

Source: Traces/European Commission 2020

Reference

European Commission (2020); EU imports of organic agri-food products - Key developments in 2019 = EU Agricultural Market Brief No 17 of June 2020. European Commission, Brussels. The EU Agricultural Market Brief including the full data set is available at https://ec.europa.eu/info/food-farming-fisheries/farming/facts-and-figures/performance-agricultural-policy/studies-and-reports/market-analyses-and-briefs_en

Table 42: European Union: Imports by Member State 2019

Member State	Quantity in MT
Austria	28'379.11
Belgium	371'911.61
Bulgaria	14'847.12
Croatia	1'058.96
Cyprus	251.62

Member State	Quantity in MT
Czech Republic	19'955.99
Denmark	120'704.77
Estonia	326.06
Finland	18'921.34
France	240'582.45
France	240'582.45
Germany	432'897.05
Greece	8'269.80
Hungary	991.76
Ireland	4'099.41
Italy	180'388.11
Latvia	3'359.44
Lithuania	8'346.20
Luxembourg	47.25
Malta	8.82
Mexico	134'278.00
Netherlands	1'037'553.49
Poland	29'285.29
Portugal	4'305.05
Romania	9'025.71
Slovakia	616.96
Slovenia	22'418.91
Spain	100'140.05
Sweden	190'023.20
United Kingdom	393'666.09
European Union	**3'242'382.00**

Source: Traces/European Commission 2020

Table 43: Organic import volumes by exporting country, 2018 and 2019

Rank	Exporting countries	2018 Imports (MT)	2019 Imports (MT)	Change (%)	Share in total (%, 2019)	Cumulated share (%, 2019)
1	China	404 '623	433 '705	7.2	13.4	13.4
2	Ukraine	265 '817	337 '856	27.1	10.4	23.8
3	Dominican Republic	271 '801	324 '354	19.3	10.0	33.8
4	Ecuador	276 '879	304 '297	9.9	9.4	43.2
5	Peru	204 '871	214 '240	4.6	6.6	49.8
6	Turkey	262 '722	210 '760	-19.8	6.5	56.3
7	India	125 '477	176 '568	40.7	5.4	61.7
8	Colombia	63 '114	87 '341	38.4	2.7	64.4
9	Kazakhstan	50 '250	85 '675	70.5	2.6	67.1
10	Brazil	72 '204	78 '825	9.2	2.4	69.5
11	Mexico	69 '497	74 '857	7.7	2.3	71.8
12	Argentina	66 '838	63 '369	-5.2	2.0	73.8
13	Egypt	46 '599	56 '591	21.4	1.7	75.5
14	Togo	22 '123	44 '684	102.0	1.4	76.9
15	Tunisia	40 '126	42 '591	6.1	1.3	78.2
16	Israel	40 '610	40 '983	0.9	1.3	79.5
17	Moldova, Republic of	55 '368	40 '053	-27.7	1.2	80.7
18	Paraguay	35 '121	38 '271	9.0	1.2	81.9
19	Honduras	40 '235	37 '352	-7.2	1.2	83.0
20	Pakistan	27 '091	34 '116	25.9	1.1	84.1
21	Sri Lanka	26 '096	32 '089	23.0	1.0	85.1

Rank	Exporting countries	2018 Imports (MT)	2019 Imports (MT)	Change (%)	Share in total (%, 2019)	Cumulated share (%, 2019)
22	Canada	29 '726	30 '924	4.0	1.0	86.0
23	Thailand	31 '872	30 '415	-4.6	0.9	87.0
24	Philippines	23 '869	26 '487	11.0	0.8	87.8
25	Russian Federation	34 '069	26 '313	-22.8	0.8	88.6
26	South Africa	23 '145	25 '430	9.9	0.8	89.4
27	Chile	33 '223	24 '492	-26.3	0.8	90.1
28	Cote d'Ivoire	14 '392	23 '503	63.3	0.7	90.9
29	Morocco	19 '950	20 '744	4.0	0.6	91.5
30	Ghana	14 '915	20 '318	36.2	0.6	92.1
31	United States	170 '533	19 '881	-88.3	0.6	92.7
32	Serbia	20 '989	18 '065	-13.9	0.6	93.3
33	New Zealand	19 '148	17 '304	-9.6	0.5	93.8
34	Uganda	23 '327	16 '616	-28.8	0.5	94.3
35	Ethiopia	7 '265	14 '850	104.4	0.5	94.8
36	Costa Rica	16 '477	14 '776	-10.3	0.5	95.3
37	Bolivia	13 '127	13 '964	6.4	0.4	95.7
38	Burkina Faso	12 '456	13 '312	6.9	0.4	96.1
39	Sierra Leone	7 '965	11 '535	44.8	0.4	96.5
40	Viet Nam	12 '561	11 '466	-8.7	0.4	96.8
41	Cambodia	8 '553	9 '480	10.8	0.3	97.1
42	Cuba	13 '972	8 '731	-37.5	0.3	97.4
43	Indonesia	7 '468	7 '848	5.1	0.2	97.6
44	Congo, Democratic Republic Of	10 '788	7 '449	-30.9	0.2	97.8
45	Lao People S Democratic Republic	1 '374	5 '968	334.3	0.2	98.0
46	Madagascar	5 '162	5 '412	4.8	0.2	98.2
47	Nicaragua	3 '790	5 '182	36.7	0.2	98.4
48	Kenya	6 '684	4 '846	-27.5	0.1	98.5
49	Senegal	2 '637	4 '765	80.7	0.1	98.7
50	Tanzania, United Republic Of	4 '233	3 '514	-17.0	0.1	98.8
51	Japan	2 '756	2 '958	7.4	0.1	98.9
52	Mali	2 '539	2 '937	15.7	0.1	98.9
53	Australia	3 '375	2 '716	-19.5	0.1	99.0
54	Guatemala	1 '285	2 '548	98.2	0.1	99.1
55	Sudan	2 '579	2 '187	-15.2	0.1	99.2
56	Benin	1 '328	2 '081	56.6	0.1	99.2
57	Albania	1 '302	1 '881	44.5	0.1	99.3
58	Iran, Islamic Republic Of	1 '873	1 '871	-0.1	0.1	99.4
59	Bosnia and Herzegovina	1 '475	1 '521	3.1	0.0	99.4
60	São Tomé and Príncipe	1 '472	1 '508	2.4	0.0	99.4
61	Algeria	1 '198	1 '442	20.4	0.0	99.5
62	Papua New Guinea	1 '180	1 '441	22.0	0.0	99.5
63	Rwanda	1 '150	1 '366	18.9	0.0	99.6
64	Azerbaijan	966	1 '314	36.0	0.0	99.6
65	Mozambique	99	1 '216	1129.5	0.0	99.7
66	Uruguay	1 '378	960	-30.3	0.0	99.7
67	Belarus	942	943	0.0	0.0	99.7
68	Uzbekistan	949	779	-18.0	0.0	99.7
69	Palestinian Territory, Occupied	461	675	46.6	0.0	99.8
70	Niger	680	640	-5.9	0.0	99.8
71	Panama	6 '278	609	-90.3	0.0	99.8
72	Lesotho	515	606	17.6	0.0	99.8
73	Chad	1 '116	580	-48.0	0.0	99.8
74	Kosovo	544	490	-10.0	0.0	99.8
75	Guyana	433	489	12.9	0.0	99.9
76	Georgia	377	445	18.0	0.0	99.9
77	North Macedonia	211	413	95.7	0.0	99.9
78	Kyrgyzstan	49	328	562.7	0.0	99.9
79	Cameroon	401	304	-24.2	0.0	99.9
80	Nigeria	61	289	377.1	0.0	99.9

Organic Imports to the European Union

Rank	Exporting countries	2018 Imports (MT)	2019 Imports (MT)	Change (%)	Share in total (%, 2019)	Cumulated share (%, 2019)
81	Zambia	304	221	-27.1	0.0	99.9
82	Haiti	222	216	-2.9	0.0	99.9
83	Korea, Republic Of	123	214	74.3	0.0	99.9
84	Maldives	0	187	N.A.	0.0	99.9
85	Myanmar	201	150	-25.2	0.0	99.9
86	Zimbabwe	65	143	120.3	0.0	100.0
87	French Polynesia	138	142	3.2	0.0	100.0
88	El Salvador	95	132	38.9	0.0	100.0
89	Nepal	209	130	-37.7	0.0	100.0
90	Namibia	152	126	-17.1	0.0	100.0
91	Burundi	3	115	4088.3	0.0	100.0
92	Samoa	159	115	-27.6	0.0	100.0
93	Bangladesh	251	114	-54.5	0.0	100.0
94	Saudi Arabia	107	96	-10.2	0.0	100.0
95	Malaysia	20	69	243.9	0.0	100.0
96	United Arab Emirates	127 '806	62	-100.0	0.0	100.0
97	Comoros	26	62	137.0	0.0	100.0
98	Armenia	180	54	-69.8	0.0	100.0
99	Somalia	66	50	-24.1	0.0	100.0
100	Vanuatu	0	42	N.A.	0.0	100.0
101	Taiwan	27	37	37.0	0.0	100.0
102	Suriname	18	36	105.9	0.0	100.0
103	Belize	27	28	3.9	0.0	100.0
104	Seychelles	0	24	N.A.	0.0	100.0
105	Jordan	31	24	-22.9	0.0	100.0
106	Montenegro	22	21	-4.0	0.0	100.0
107	Fiji	57	20	-65.8	0.0	100.0
108	Guinea	0	18	N.A.	0.0	100.0
109	Lebanon	7	14	98.7	0.0	100.0
110	Guinea-Bissau	0	5	N.A.	0.0	100.0
111	Botswana	0	3	N.A.	0.0	100.0
112	Mauritius	2	3	33.6	0.0	100.0
113	Gambia	1	2	194.6	0.0	100.0
114	Singapore	66	2	-97.7	0.0	100.0
115	Saint Lucia	0	1	N.A.	0.0	100.0
116	New Caledonia	0	0	N.A.	0.0	100.0
117	Oman	0	0	-47.1	0.0	100.0
118	Afghanistan	0	0	-98.9	0.0	100.0
119	East Timor	55	0	-100.0	0.0	100.0
120	Netherlands Antilles	54	0	-100.0	0.0	100.0
121	Equatorial Guinea	46	0	-100.0	0.0	100.0
122	Solomon Islands	28	0	-100.0	0.0	100.0
123	Grenada	3	0	-100.0	0.0	100.0
	Total	**3'230'675**	**3'242'382**	**0.36**		

Source: Traces/European Commission 2020

Table 44: Organic import volumes by product category, 2018 and 2019 (MT)

Rank	Product categories	2018 Imports (MT)	2019 Imports (MT)	Change (%)	Share in total (%, 2019)	Cumu-lated share (%, 2019)	Estimated share of total import (%, 2019)
1	Tropical fruit, fresh or dried, nuts and spices	785'162	885'930	12.8	27.3	27.3	9
2	Oilcakes	341'663	385'924	13.0	11.9	39.2	2
3	Cereals, other than wheat and rice	254'197	233'179	-8.3	7.2	46.4	*1*
4	Beet and cane sugar	165'811	213'797	28.9	6.6	53.0	*8*
5	Wheat	241'882	203'927	-15.7	6.3	59.3	*4*
6	Oilseeds, other than soybeans	192'514	160'137	-16.8	4.9	64.2	*2*
7	Vegetables, fresh, chilled and dried	147'471	159'155	7.9	4.9	69.1	*3*
8	Unroasted coffee, tea in bulk & maté	127'232	141'383	11.1	4.4	73.5	*4*
9	Fruit, fresh or dried, excl. citrus & tropical fruit	146'111	133'723	-8.5	4.1	77.6	*3*
10	Soybeans	105'870	132'000	24.8	4.1	81.7	*1*
11	Fruit juices	89'008	86'519	-2.8	2.7	84.4	*4*
12	Rice	216'017	70'509	-67.4	2.2	86.5	*3*
13	Cocoa beans	74'100	65'751	-11.3	2.0	88.6	*3*
14	Preparations of vegetables, fruit or nuts	54'847	56'983	3.9	1.8	90.3	*3*
15	Sugar, other than beet & cane	39'400	43'186	9.6	1.3	91.7	*2*
16	Palm & palm kernel oils	39'644	40'586	2.4	1.3	92.9	*0*
17	Olive oil	30'125	33'621	11.6	1.0	94.0	*19*
18	Citrus fruit	29'042	29'837	2.7	0.9	94.9	*1*
19	Food preparations, not specified	17'994	22'725	26.3	0.7	95.6	*5*
20	Wine, vermouth, cider and vinegar	21'062	19'937	-5.3	0.6	96.2	*1*
21	Flours and other products of the milling industry	20'324	19'304	-5.0	0.6	96.8	*10*
22	Eggs and honey	17'808	18'032	1.3	0.6	97.3	*8*
23	Bulbs, roots and live plants	12'484	13'519	8.3	0.4	97.8	*5*
24	Vegetable oils other than palm & olive oils	10'155	13'005	28.1	0.4	98.2	*0*
25	Miscellaneous seeds and hop cones	7'332	9'157	24.9	0.3	98.4	*9*
26	Gums, resins and plant extracts	7'060	8'720	23.5	0.3	98.7	*3*
27	FISH	5'828	7'098	21.8	0.2	98.9	*N.A.*
28	Soups and sauces	5'940	6'226	4.8	0.2	99.1	*2*
29	Infant food and other cereals, flour, starch or milk preparations	4'483	4'882	8.9	0.2	99.3	*2*
30	Starches, inulin & gluten	3'947	3'823	-3.1	0.1	99.4	*3*
31	Pasta, pastry, biscuits and bread	2'917	3'318	13.7	0.1	99.5	*0*
32	Pet food	1'844	3'096	67.9	0.1	99.6	*0*
33	Water and soft drinks	1'718	2'585	50.5	0.1	99.7	*0*
34	Other feed and feed ingredients	2'580	2'191	-15.1	0.1	99.7	*0*
35	Cocoa paste and powder	1'812	2'160	19.2	0.1	99.8	*0*
36	NON AGRI	729	1'525	109.1	0.0	99.9	*N.A.*
37	Essential oils	1'170	1'192	1.9	0.0	99.9	*3*
38	Roasted coffee and tea	788	894	13.4	0.0	99.9	*1*
39	Bovine meat, fresh, chilled and frozen	666	486	-27.1	0.0	99.9	*0*
40	Chocolate, confectionery and ice cream	382	459	20.1	0.0	99.9	*0*
41	Sugar alcohols	250	450	80.0	0.0	100.0	*1*
42	Ethanol	233	352	51.4	0.0	100.0	*0*
43	Coffee and tea extracts	253	342	35.4	0.0	100.0	*0*
44	Spirits and liqueurs	99	261	164.4	0.0	100.0	*0*
45	Non edible animal products	453	233	-48.4	0.0	100.0	*0*
46	Fatty acids and waxes	74	85	13.7	0.0	100.0	*0*
47	Sheep and goat meat, fresh, chilled and frozen	132	71	-46.3	0.0	100.0	*0*
48	Odoriferous substances	42	19	-55.7	0.0	100.0	*2*
49	Cut flowers and plants	1	9	542.7	0.0	100.0	*0*
50	Cheese	0	1	N.A.	0.0	100.0	*0*
51	Pork meat, fresh, chilled and frozen	19	0	-100.0	0.0	100.0	*0*
52	Butter	0	0	-100.0	0.0	100.0	*0*
	Total	**3'230'675**	**3'242'382**	**0.36**			**2**

Source: Traces/European Commission 2020

Standards and Legislation, Policy Support

Organic Agriculture Regulations Worldwide: Current Situation

CORNELIA KIRCHNER,[1] JOELLE KATTO-ANDRIGHETTO[2] AND FLÁVIA MOURA E CASTRO[3]

According to data collected by IFOAM – Organics International and FiBL, 72 countries had fully implemented organic regulations as of 2020. Twenty-two countries had regulations, which were not fully implemented, while 14 countries were in the process of drafting legislation (Table 45, Table 46).

Among the countries that passed new organic regulations in 2020 are Madagascar and Egypt. There are also countries that are going through major revisions of their existing regulations; among these are the European Union and the United States. Countries that have concluded significant amendments of their existing regulations in 2020 include the Philippines and Peru.

Table 45: Status of organic agriculture regulation: Number of countries by region 2020

Region	Drafting	Fully Implemented	Not fully Implemented	Total countries
Africa	5	1	4	10
Asia	7	10	11	28
Europe		39	4	43
Latin America and the Caribbean	2	16	3	21
North America		2		2
Oceania		4		4
Total	**14**	**72**	**22**	**108**

Source: IFOAM – Organics International 2021

In an increasingly regulated world and with a growing global organic market, trade and equivalence agreements are increasingly relevant and desired in order to lift trade barriers. In 2020, Taiwan was the most active actor in negotiating equivalence agreements. Taiwan's revised organic regulation that came into force in May 2019 included a one-year timeline for converting existing unilateral recognitions by Taiwan into bilateral equivalency agreements; otherwise, they would expire. By autumn 2020 Taiwan had signed five new bilateral equivalency agreements with Japan, Australia,

[1] Cornelia Kirchner, Policy & Guarantee Senior Coordinator, IFOAM – Organics International, 53113 Bonn, Germany, www.ifoam.bio, c.kirchner@ifoam.bio
[2] Joelle Katto-Andrighetto, Senior Manager Policy & Guarantee, IFOAM – Organics International, 53113 Bonn, Germany, www.ifoam.bio, j.katto@ifoam.bio
[3] Flávia Moura e Castro, Policy & Guarantee Senior Coordinator at IFOAM – Organics International, 53113 Bonn, Germany, www.ifoam.bio, f.castro@ifoam.bio

Canada, New Zealand and the United States. With Brexit advancing, the United Kingdom is a new player entering trade agreement negotiations.[1]

New organic regulations were adopted in Madagascar, Egypt and Russia

New organic law passed in Madagascar ensures organic integrity without hindering growth

In May 2020, Madagascar approved its first organic regulation, the law No. 10/2019 of 28 November, 2019. The law was developed in close collaboration with the private sector, producer organizations, NGOs, certification bodies, research institutions, and corresponding Ministries. The law establishes the framework to develop a national organic standard for producers wishing to produce for the local market. However, it also recognizes the equivalence of other organic standards, particularly those already used for exports, so that the products certified against those standards will continue to be marketable as organic on the domestic market. Another strength of this organic law is that it encourages the participation of small producers in the sector by recognizing Participatory Guarantee Systems (PGS) as a valid means of certification for the domestic market. These are expected to be cheaper and more appropriate than third-party certification for small farmers aiming to operate in the domestic market. The next steps will be the development of complementary legislation, including the national organic standard and the development of the first national organic strategy for organic agriculture.

New organic law approved in Egypt

In January 2020, the Egyptian Parliament passed its first organic regulation. The law aims to limit the negative effects of farming methods that depend on synthetic chemicals in planting and animal feeding. Many details, including the production rules, control procedures and conditions for import and export still need to be defined.

Organic law came into force in Russia

In Russia, the organic regulation that was passed in July 2018 - Federal Law No. 280 - came into force in January 2020. For the first time, the law regulates production, storage, transportation, labelling, and marketing of organic products in the country. The law also includes the creation of a unified state registry for organic producers.

Important revisions are ongoing or were finalized in the US, the European Union, the Philippines, Peru and Mexico

Revision of the US Organic Regulation aims to strengthen organic enforcement

In August 2020, the US National Organic Program (NOP) published a proposal to revise the USDA organic regulation, with a view to strengthen oversight and enforcement in

[1] Information about current equivalence agreements can be accessed at https://www.ifoam.bio/equivalence-tracker.

the organic supply chain. Among the main changes proposed in the first public draft are:

- Fewer exemptions from organic certification for handlers
- Mandatory use of electronic NOP import certificates
- Increased traceability and mass-balance/supply chain audits
- Revision of grower group requirements to standardize and strengthen oversight

The revision process is expected to continue well into 2021.

Revision process of the European Union (EU) organic regulation continues

The new EU organic regulation 2018/848 was adopted in 2018 when the basic act was published. Drafting of the secondary legislation – the implementing and delegated acts – for production, labelling, controls, and trade started in 2018 and will continue in 2021. The timelines for the new regulation to come into force are as follows:

- New EU regulation comes into force: 1. January 2022.
- Transition period for certification bodies to apply the EU Standard and move from equivalence to compliance: up to three years from the date the regulations comes into force.
- Transition period for negotiation of trade agreements with countries currently recognized as equivalent: 5 years from the date the regulations comes into force.

Law that recognizes PGS in the Philippines is celebrated as achievement

In 2020 an amendment of the Organic Agriculture Law – the Republic Act 10068 from 2010 – was approved by the Senate. The amendment includes official recognition of PGS as a verification system for organic agriculture alongside third-party certification. The Philippines is among the world's leading countries in terms of PGS implementation with a more than 15-year history. Many local government units actively support PGS. The system has proven to be a reliable tool to guarantee organic quality on the domestic market that is also accessible for small producers. This change in the law in favour of PGS recognition is the result of a decade of intense advocacy efforts by stakeholders from the organic sector in the Philippines. The rules applicable to the PGS initiatives in the country have been drafted in close consultation with the sector.

Amendment of organic law in Peru that recognizes PGS is met by criticism

Peru is another country that now officially recognizes PGS. In February 2020, the government approved an amendment to its organic regulation – law 29196 from 2012. The amendment recognizes PGS initiatives as certification entities for organic agriculture on the same level as third-party certification bodies. Despite having gained recognition, the law is viewed critically by many actors involved in PGS and the organic movement in Peru. They are concerned about the country's existing PGS laws and structures being neglected and the heavy bureaucracy proposed. It is expected that many existing PGS groups will find it difficult to enter into the government recognition scheme and that barriers are high, especially for smallholders and remote initiatives.

Mexico expands the scope of the regulation

Mexico revised its organic regulation that had been published in 2013. The revisions expanded the scope to beekeeping and aquaculture production and aimed to harmonize the regulation with international regulations to facilitate future equivalence agreements with its main export markets, the US, Canada and the EU.

Contact

Please send comments or information about countries that are not listed in the table below to Cornelia Kirchner (c.kirchner@ifoam.bio).

Annex: Table on the status of organic agriculture regulations

Table 46: Status of organic agriculture regulations

Region	Country	Status of regulations	Relevant Remarks
Africa	Algeria	Drafting	
	Botswana		
	Burkina Faso		
	Burundi		Regional voluntary standards (EAOPS[1])
	Cameroon	Drafting	
	Cape Verde		
	Central African Republic		
	Comoros		
	Congo, Dem. Rep.		
	Congo, Rep.		
	Djibouti		
	Egypt	Not fully Implemented	
	Equatorial Guinea		
	Eritrea		
	Eswatini		
	Ethiopia	Not fully Implemented	
	Gabon		
	Gambia		
	Ghana		
	Guinea		
	Guinea-Bissau		
	Ivory Coast		
	Kenya		Regional voluntary standards (EAOPS)
	Lesotho		
	Liberia		
	Libya		
	Madagascar	Not fully Implemented	PGS recognition.
	Malawi		
	Mali		
	Mauritania		
	Mauritius	Drafting	
	Morocco	Not fully Implemented	
	Mozambique		
	Namibia		
	Niger		
	Nigeria		
	Rwanda		Regional voluntary standards (EAOPS)
	São Tomé and Príncipe		
	Senegal		
	Seychelles		
	Sierra Leone		
	Somalia		
	South Africa	Drafting	
	South Sudan		
	Sudan	Drafting	
	Tanzania		Regional voluntary standards (EAOPS)
	Togo		
	Tunisia	Fully Implemented	
	Uganda		Regional voluntary standards (EAOPS)
	Zambia		

[1] EAOPS = East African Organic Standard

Region	Country	Status of regulations	Relevant Remarks
	Zimbabwe		
Asia	Afghanistan		
	Armenia	Not fully Implemented	
	Azerbaijan	Not fully Implemented	
	Bahrain		
	Bangladesh	Drafting	
	Bhutan	Drafting	
	Brunei Darussalam		
	Cambodia	Drafting	
	China	Fully Implemented	
	DPR Korea		
	East Timor		
	Hong Kong		
	India	Fully Implemented	PGS recognition.
	Indonesia	Fully Implemented	
	Iran	Not fully Implemented	
	Iraq		
	Israel	Fully Implemented	
	Japan	Fully Implemented	
	Jordan	Not fully Implemented	
	Kazakhstan	Not fully Implemented	
	Kuwait	Fully Implemented	
	Kyrgyzstan	Not fully Implemented	
	Laos		
	Lebanon	Drafting	
	Malaysia	Fully Implemented	
	Maldives		
	Mongolia	Not fully implemented	PGS recognition.
	Myanmar		
	Nepal		
	Oman		
	Pakistan	Drafting	
	Palestine		
	Philippines	Not fully Implemented	PGS recognition.
	Qatar		
	Republic of Korea	Fully Implemented	
	Saudi Arabia	Not fully implemented	
	Singapore		
	Sri Lanka	Drafting	
	Syria		
	Taiwan	Fully Implemented	
	Tajikistan	Not fully Implemented	
	Thailand		
	Turkmenistan		
	United Arab Emirates	Fully Implemented	
	Uzbekistan	Drafting	
	Vietnam	Not fully Implemented	
	Yemen		
Europe	Albania	Fully Implemented	
	Andorra	Fully Implemented	
	Austria	Fully Implemented	Regional compulsory regulation (EU Reg)
	Belarus	Not fully implemented	
	Belgium	Fully Implemented	Regional compulsory regulation (EU Reg)
	Bosnia & Herzegovina	Not fully Implemented	
	Bulgaria	Fully Implemented	Regional compulsory regulation (EU Reg)
	Croatia	Fully Implemented	Regional compulsory regulation (EU Reg)
	Cyprus	Fully Implemented	Regional compulsory regulation (EU Reg)
	Czech Republic	Fully Implemented	Regional compulsory regulation (EU Reg)
	Denmark	Fully Implemented	Regional compulsory regulation (EU Reg)
	Estonia	Fully Implemented	Regional compulsory regulation (EU Reg)
	Finland	Fully Implemented	Regional compulsory regulation (EU Reg)
	France	Fully Implemented	Regional compulsory regulation (EU Reg)
	Georgia	Fully Implemented	
	Germany	Fully Implemented	Regional compulsory regulation (EU Reg)
	Greece	Fully Implemented	Regional compulsory regulation (EU Reg)
	Hungary	Fully Implemented	Regional compulsory regulation (EU Reg)
	Iceland	Fully Implemented	
	Ireland	Fully Implemented	Regional compulsory regulation (EU Reg)
	Italy	Fully Implemented	Regional compulsory regulation (EU Reg)
	Kosovo		
	Latvia	Fully Implemented	Regional compulsory regulation (EU Reg)
	Liechtenstein	Fully Implemented	
	Lithuania	Fully Implemented	Regional compulsory regulation (EU Reg)
	Luxemburg	Fully Implemented	Regional compulsory regulation (EU Reg)
	Malta	Fully Implemented	Regional compulsory regulation (EU Reg)
	Moldova		
	Monaco		
	Montenegro	Fully Implemented	
	Netherlands	Fully Implemented	Regional compulsory regulation (EU Reg)

Region	Country	Status of regulations	Relevant Remarks
	North Macedonia		
	Norway	Fully Implemented	
	Poland	Fully Implemented	Regional compulsory regulation (EU Reg)
	Portugal	Fully Implemented	Regional compulsory regulation (EU Reg)
	Romania	Fully Implemented	Regional compulsory regulation (EU Reg)
	Russia	Not fully Implemented	
	San Marino	Fully Implemented	
	Serbia	Fully Implemented	
	Slovak Republic	Fully Implemented	Regional compulsory regulation (EU Reg)
	Slovenia	Fully Implemented	Regional compulsory regulation (EU Reg)
	Spain	Fully Implemented	Regional compulsory regulation (EU Reg)
	Sweden	Fully Implemented	Regional compulsory regulation (EU Reg)
	Switzerland	Fully Implemented	
	Turkey	Fully Implemented	
	Ukraine	Not fully Implemented	
	United Kingdom	Fully Implemented	Regional compulsory regulation (EU Reg)
Latin America and the Caribbean	Antigua and Barbuda		
	Argentina	Fully Implemented	
	Bahamas		
	Barbados		
	Belize		
	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	
	Dominica		
	Dominican Republic	Fully Implemented	
	Ecuador	Fully Implemented	PGS recognition.
	El Salvador	Not fully Implemented	
	Grenada		
	Guatemala	Fully Implemented	
	Guyana		
	Guyana		
	Haiti		
	Honduras	Fully Implemented	
	Jamaica	Drafting	
	Mexico	Fully Implemented	PGS recognition.
	Montserrat		
	Nicaragua	Fully Implemented	
	Panama	Fully Implemented	
	Paraguay	Fully Implemented	PGS recognition.
	Peru	Fully Implemented	PGS recognition.
	Saint Lucia		
	Saint Vincent and the Grenadines		
	St. Kitts and Nevis		
	St. Lucia	Drafting	
	St. Vincent and the Grenadines		
	Suriname		
	Trinidad and Tobago		
	Uruguay	Fully Implemented	PGS recognition.
	Venezuela	Not Fully Implemented	
	Canada	Fully Implemented	
	USA	Fully Implemented	
Oceania	Australia	Fully Implemented	Only for export.
	Fiji		Regional voluntary standards (POS)
	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 2021

Participatory Guarantee Systems in 2020

FLÁVIA MOURA E CASTRO,[1] SARA ANSELMI,[2] CORNELIA KIRCHNER[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]). Despite the difficulties related to the impact of the COVID-19 pandemic in 2020, the number of PGS initiatives and producers involved in and certified by them has been growing on all regions of the world (for definitions see the end of the article). They represent today a well-established guarantee system for organic agriculture in many countries.

In 2020, Peru, the Philippines and Madagascar included PGS as recognised guarantee systems to ensure the organic quality of products at the national level. India and Mongolia are also in the process of implementing recently approved regulations, including PGS, bringing the total number of countries and territories that recognise PGS in their legal framework for organic agriculture to 15.[6]

IFOAM – Organics International is the only organisation collecting data about PGS on a global level. During 2020 many PGS initiatives were affected by the measures restricting contact and physical interaction, which were adopted worldwide due to the COVID-19 pandemic. Regular meetings and peer reviews could not be carried out as planned or not including all their members. This is partly reflected in the data reported here, as it was not possible to collect recent figures for all countries. Notwithstanding, the overall trend towards an increase in the number of PGS initiatives and producers certified is maintained and, to date,[7] we have recorded in our PGS database 235 PGS initiatives in 77 countries, with at least 1'153'220 producers involved and 1'110'964

[1] Flávia Moura e Castro, Policy & Guarantee Senior Coordinator at IFOAM – Organics International, 53113 Bonn, Germany, www.ifoam.bio, f.castro@ifoam.bio

[2] Sara Anselmi, Policy & Guarantee Junior Coordinator at IFOAM – Organics International, 53113 Bonn, Germany, www.ifoam.bio, s.anselmi@ifoam.bio

[3] Cornelia Kirchner, Policy & Guarantee Senior Coordinator at IFOAM – Organics International, 53113 Bonn, Germany, www.ifoam.bio, c.kirchner@ifoam.bio

[4] Federica Varini, Policy & Guarantee Coordinator at IFOAM – Organics International, 53113 Bonn, Germany, www.ifoam.bio, (f.varini@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] The 15 countries and territories are: Bolivia, Brazil, Chile, Costa Rica, Ecuador, India, Madagascar, Mexico, Mongolia, Paraguay, Peru, Philippines, Uruguay, French Polynesia and New Caledonia. Some of these have recently approved regulations that are not yet fully implemented.

[7] Data collection was completed on 10 December 2020.

producers certified (Figure 56). It is estimated that these producers manage over 755'000 ha of land[1].

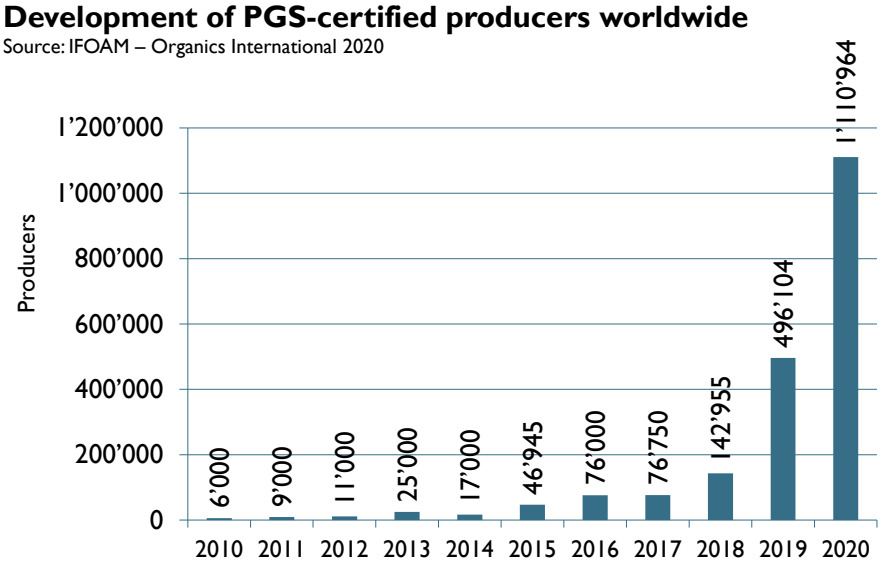


Figure 56: Development of PGS certified producers worldwide

Source: IFOAM – Organics International 2020

The absolute majority of PGS certified producers and producers involved in PGS are found in India, where according to the data from the Indian Ministry of Agriculture and Farmers Welfare, a total of 1'078'535 PGS certified producers manage 614'504 hectares of agricultural land. These figures represent a significant growth compared to 2019: an increase of over 120 percent in the number of PGS certified producers and a 65% increase in hectares of PGS certified area in India. Alongside the governmental PGS initiative, the civil society organisations gathered under "PGS Organic Council" in India certified a total of 5'553 producers, of which 632 are also included in the governmental program. The total of PGS certified producers in India has reached the impressive figure of 1'083'456[2].

Worldwide, there are seven other countries with more than 1'000 producers certified by PGS: Brazil (7'821), Thailand (2'029), Uganda (2'044), Peru (1'790), Bolivia (1'287), Vanuatu (1'269) and France (1'147).

[1] Unfortunately, data referring to the area under organic management that is PGS certified is not available for all PGS initiatives and countries.

[2] Data collection was carried out until 10 December 2020.

Regional development

Africa

This region has seen an overall increase in the figures compared to what we reported in 2019: it is estimated that there are 20'161 producers involved in PGS, 5'345 of whom are certified in African countries. Eleven PGS initiatives are under development in and 21 are operational in the region. Cameroon is now also included in this overview, where the PGS initiative Etso Mbong, involving 170 producers, is currently operational and has granted PGS certification to 22 of them.

Burkina Faso, Ghana, Togo and São Tomé and Príncipe, the four countries involved in the project Organic Market for Development (OM4D),[1] all reported increased figures for the total producers involved in PGS. In Burkina Faso, the total of PGS certified producers almost doubled since the past year. In Ghana, the first 18 PGS certificates have been granted.

Asia

Asia counts more PGS producers than any other region, with at least 1'102'198 producers involved, of which 1'088'432 are certified: over 600'000 more than what was reported in 2019. This development is related to the continuous increase in numbers of farmers joining the governmental initiative "PGS-India" implemented by the National Center of Organic Farming (NCOF) in the past two years, since the approval of the new legal framework that recognises PGS alongside third-party certification for organic certification in the domestic market.[2] After India, the highest numbers for producers involved in PGS in Asia are now found in Kyrgyzstan (3000), which has also seen an increase in the numbers of producers certified (682 in 2019 to 889 in 2020), Thailand (2'155) and South Korea (2'000). In terms of certified producers, Thailand (2'029) continues to hold second place in the region, after India. Asia remains the second region, after Latin and Central America, with the highest number of operational PGS initiatives (35).

Europe and North America

The situation presented here for Europe and North America[3] refers mainly to data collected in 2019 and updates or new entries reported throughout 2020 via the Global Map of PGS initiatives[4]. There has been a minor increase in most indicators in Europe: 2'070 is the total number of producers involved in PGS, of whom 1'667 are certified. The majority of them are located in France, where 1'147 are certified producers. The

[1] This project is implemented by IFOAM – Organics International and Agro Eco – Louis Bolk Institute, together with local and regional partners, and it is funded by the Dutch Ministry of Foreign Affairs; to learn more visit: https://www.ifoam.bio/en/OM4D

[2] 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/

[3] No relevant updates are available for this region.

[4] To access the map, please visit: https://pgs.ifoam.bio/

number of PGS initiatives under development reported this year is also slightly higher: 14 in 2020, instead of 12 in 2019.

Latin and Central America

Brazil and Chile are the two countries responsible for the increase in overall PGS figures observed in this region in 2020. The total number of producers involved in PGS initiatives has increased by 1'437, reaching 23'584, among which 12'609 are certified producers (14% increase compared to 2019). The total area that is PGS certified in the region is likely to have increased, but unfortunately, we do not have access to this information.

Latin and Central America is again the region with the highest number of operational PGS initiatives, 88 in total. While six of these new PGS initiatives are based in Chile (4) and Brazil (2), one is based in El Salvador and has granted PGS certificates for the first time in 2020.

In 2020 Peru, the country in the region with the second-highest number of producers certified (at least 1'790 producers certified), approved an amendment to the organic regulation (Law 29196 from 2012) that recognises PGS initiatives as certification entities for organic agriculture at the same level as third-party certification bodies. Even though advocacy towards this recognition had been ongoing for over a decade, various national PGS stakeholders have manifested concern towards what they see as a neglect of the law for the country's existing PGS structures and the heavy bureaucracy proposed (see contribution by Kirchner et al. on organic regulations, page 152).

Oceania

Oceania saw a decrease of 22 percent in total of PGS certified producers compared to 2019: PGS initiatives in the region reported 2'256 producers and at least 3'447 producers involved in PGS. The reduction in PGS certified producers in this region is seen mainly in Fiji (405 less than in 2019) and French Polynesia[1]. Vanuatu remains the country in the region with the highest number of PGS certified producers (1'269). A decrease has also been observed in the total area that is managed by PGS certified producers: 4'531 ha compared to 7'214 hectares in 2019.

General notes on the data

Every two years IFOAM – Organics International conducts a global PGS survey. The last survey was conducted in 2019; therefore, most PGS figures 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 there is no update for several years. In such cases, initiatives might be considered no longer active and thus excluded from the

[1] The decrease observed for French Polynesia is most likely related to the fact that the over 200 producers, members of 7 local groups, who were considered as individual operators in previous reports. For 2020 only the 7 groups were included in the overview.

current statistics. When PGS are recognised under national organic regulation, data collected and published by competent authorities is used, this is the case in Brazil,[1] Chile,[2] Bolivia,[3] Costa Rica,[4] Mexico,[5] and India.[6]

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.

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:

(a) **Operational PGS**: a PGS that is implementing a functional certification system to certify their producers and has emitted at least one certificate to one farmer.
(b) **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:

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[1] 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

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

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

[4] Servicio Fitosanitario del Estado, MAG, Costa Rica: Registrados en Arao - Certificación Participativa. Available at https://www.sfe.go.cr/SitePages/ARAO/InicioARAO.aspx

[5] Servicio Nacional de Sanidad, Inocuidad y Calidad Agroalimentaria, Mexico: Padrón de Organismos de Certificación Participativa de productos orgánicos a pequeños productores y producción familiar.

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

(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 47: PGS statistics 2020

Row Labels	Producers certified	Producers involved	Operational PGS	Developing PGS	Total PGS certified land [ha]
Africa	**5'345**	**20'161**	**21**	**11**	**1'314**
Benin	228	586	1		164
Burkina Faso	549	968	1		146
Burundi		4'820		1	
Cameroon	22	170	1		
Ethiopia		30		1	
Ghana	18	280	1		68
Kenya	178	1'337	1		
Mali	50	150	1		
Mauritius				1	
Morocco	27	27	1		352
Mozambique	18	90	1		0
Namibia	4	11	1		23
Nigeria	706	706	1		45
Rwanda	0	315		1	
São Tomé and Príncipe	0	40		1	
Senegal	291	497	1		370
South Africa	331	613	7	2	140
Tanzania	864	1'764	1		
Togo	0	518		4	
Uganda	2'044	7'224	1		
Zimbabwe	15	15	1		6
Asia	**1'088'432**	**1'102'198**	**35**	**24**	**727'530**
Bangladesh	0	123		1	0
Bhutan	0	100		1	
Cambodia	112	249	4	5	23
China		1'129		3	
India	1'083'456	1'088'535	2		620'946
Indonesia	295	425	1		83'323
Japan	5	8	1		2
Kyrgyzstan	889	3'000	1		17'997
Laos	310	495	2	1	773
Mongolia	2	26	1		
Myanmar	304	304	1		379
Nepal	39	373	3	1	66
Pakistan				1	
Philippines	222	1'980	6	7	318
South Korea	250	2'000	1		
Sri Lanka	155	756	1	1	222
Taiwan	60	60	1		
Thailand	2'029	2'155	6	1	3'367
Vietnam	304	480	4	2	114

Row Labels	Producers certified	Producers involved	Operational PGS	Developing PGS	Total PGS certified land [ha]
Europe	**1'667**	**2'070**	**17**	**14**	**4'590**
Belgium	80	191	1	1	
Bosnia		5		1	
Czech Republic		2		1	
France	1'147	1'217	3	2	400
Germany	38	38		1	2'670
Greece				1	
Hungary		10		2	
Italy	206	255	3	2	1'428
Spain	196	327	10	2	92
Turkey	0	25		1	
Latin America	**12'609**	**23'584**	**88**	**8**	**9'142**
Argentina	20	40	1	1	170
Belize		5		1	
Bolivia	1'287	3'395	4		190
Brazil	7'821	8'601	28		2'564
Chile	264	259	18	3	908
Colombia	373	649	6		335
Costa Rica	32	50	6		176
Cuba	0	3'712		1	0
Ecuador	637	1'877	4		80
El Salvador	8				
Guatemala	25	50	1		1
Mexico	139	288	7	2	683
Paraguay	78	211	2		235
Peru	1'790	3'947	10		3'250
Uruguay	135	500	1		550
North America	**655**	**1'760**	**1**	**1**	**8'440**
Puerto Rico		10		1	
USA	655	1'750	1		8'440
Oceania	**2'256**	**3'447**	**12**	**3**	**4'531**
Australia	14	25	1	1	2'200
Cook Islands	11	10	1		6
Fiji	706	1'092	5		0
French Polynesia	21	295	1		97
Kiribati	0	120		1	
New Caledonia	95	179	1		1'287
New Zealand	140	150	1		
Samoa				1	
Solomon Islands	0	76	1		50
Vanuatu	1'269	1'500	1		891
Total	**1'110'964**	**1'153'220**	**174**	**61**	**755'547**

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 worldwide network of individual certification organisations. In 1997 Demeter International was founded for closer cooperation in the legal, economic and spiritual spheres. The joint organisation, which is now the Biodynamic Federation – Demeter International, has 45 member organisations in 36 countries working biodynamically. Of these, 19 are certifying organisations. In all other countries, the International Certification Office (ICO) is certifying. There are currently 6'400 Demeter farmers with more than 220'000 hectares in 62 countries (Table 48, Table 49).

The Biodynamic Federation is a non-profit organisation, and its member organisations work together in the spirit of an international confederation with democratic principles. Membership requires a functioning Demeter certification programme. Associations which support the objectives of Biodynamic Federation - Demeter International can be elected as associated members. Its 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 Biodynamic Federation - 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 3'500 to almost 6'500 (Figure 57, Figure 58). The latest developments show a strong interest in Demeter certification. As a result of the growth in recent years, today, more than 220'000 hectares of agricultural land is cultivated biodynamically. Demeter bananas, for example, are currently a very dynamic sector. Due to the great interest in

[1] Christoph Simpfendörfer, Demeter-International e.V., Office Echterdingen, Hauptstraße 82, 70771 Echterdingen, Germany, www.demeter.net
[2] Sarah Fischer, Demeter-International e.V., Office Echterdingen, Hauptstraße 82, 70771 Echterdingen, Germany, www.demeter.net

the conversion and the newly created distribution channels, large areas have been converted to biodynamic cultivation.

Development of Demeter-certified farms
Source: Demeter International 2020

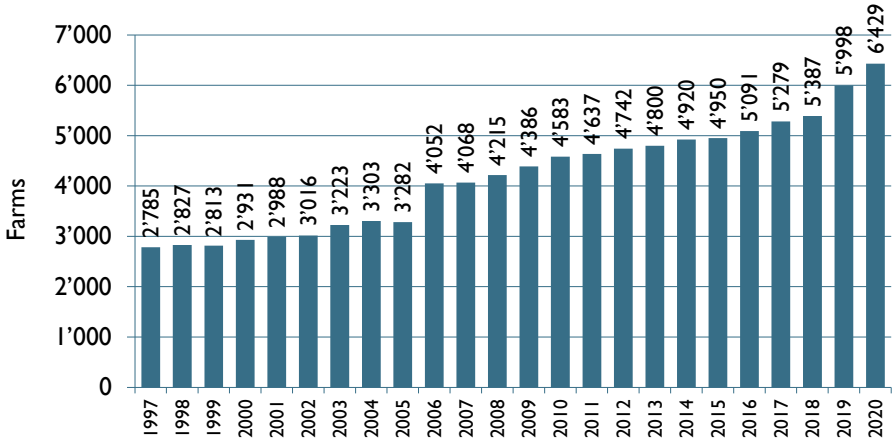

Figure 57: Development of the number of Demeter-certified farms

Source: Demeter International

Development of the Demeter-certified area
Source: Demeter International 2020

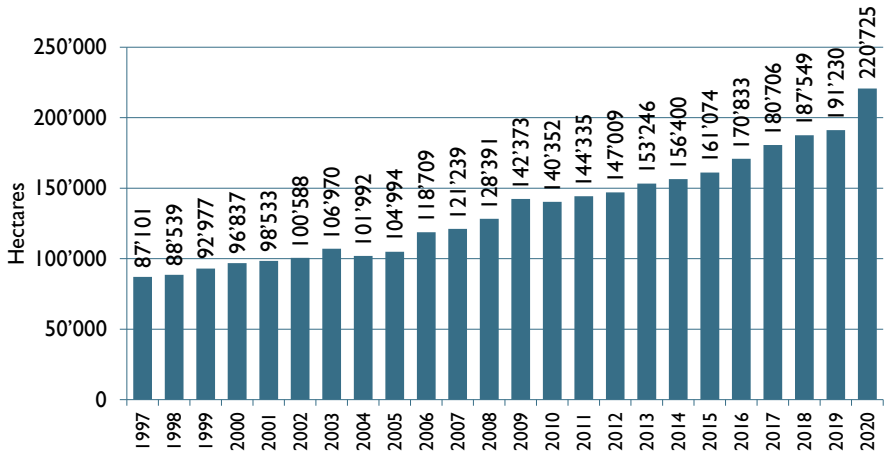

Figure 58: Development of the Demeter-certified area

Source: Demeter International

Biodynamic viticulture is also becoming increasingly important. At present, there are about 1'012 wineries worldwide that are Demeter-certified, led by France with 438 wineries. Outside the European Union, most of the wineries are located in Switzerland, the US, Chile and Argentina. In total, around 15'000 hectares of the Demeter-certified area are biodynamic vineyards.

Table 48: Certified Demeter operations in member countries with a certifying organisation (July 2020)

	Hectares	Farms	Processors	Distributors
Austria	6'905	214	44	0
Brazil	3'349	24	28	5
Denmark	3'418	44	9	8
Egypt	2'838	86	8	0
Finland	391	13	5	5
France	16'754	668	90	69
Germany	91'583	1'678	410	146
Great Britain	3'811	90	44	9
India	9'029	35	8	2
Italy	10'895	389	90	60
Luxembourg	543	13	2	0
The Netherlands	7'852	143	44	47
New Zealand	815	13	0	0
Norway	521	21	7	10
Slovenia	255	32	3	0
Spain	9'397	209	41	9
Sweden	853	13	6	8
Switzerland	5'612	319	82	55
USA	17'352	143	111	55
Total	**192'173**	**4'147**	**1032**	**488**

Source: Biodynamic Federation - Demeter International e.V.

Table 49: ICO-certified[1] Demeter operations in other countries

	Hectares	Farms	Processors	Distributors
Argentina	1'106	35	6	1
Belgium	299	12	6	1
Bulgaria	308	1	0	1
Chile	1'361	21	0	3
China	53	4	2	1
Colombia	137	2	0	0
Croatia	68	1	0	0

[1] ICO is the International Certification Office of Biodynamic Federation – Demeter International

	Hectares	Farms	Processors	Distributors
Czech Republic	2'339	5	0	1
Dominican Rep.	1'869	50	1	1
Ecuador	475	88	3	1
Ethiopia	32	1	0	0
Georgia	5	2	0	0
Greece	466	45	5	3
Guinea Bissao	780	1	0	1
Honduras	72	8	0	0
Hungary	6'284	27	2	2
Iran	67	1	1	0
Ireland	224	6	2	0
Israel	127	1	1	0
Japan	0	0	0	2
Kuwait	0	0	1	0
Liechtenstein	45	2	0	0
Lithuania	1'338	9	0	1
Malaysia	0	0	3	0
Mexico	304	5	1	0
Morocco	27	1	0	0
Nepal	110	90	0	0
Paraguay	926	54	0	0
Peru	305	18	2	0
Poland	3'935	19	0	0
Portugal	798	15	1	1
Romania	200	2	0	0
Russia	0	0	0	1
Serbia	45	1	1	0
Sicily	426	25	2	2
Singapore	0	0	1	0
Slovakia	157	1	0	0
South Africa	245	24	0	1
Sri Lanka	1'493	1'422	4	0
Tanzania	31	1	0	0
Tunisia	714	133	3	0
Turkey	904	147	1	2
Uganda	477	2	0	0
Ukraine	0	0	0	1
United Arab Emirates	0	0	1	0
Uruguay	0	0	1	1
Total	**28'552**	**29'409**	**51**	**28**
Total Table 48 and Table 49	**220'725**	**6'429**	**1083**	**516**

Source: Biodynamic Federation - Demeter International e.V.

Table 50: Demeter certified vintners and grape area worldwide*

Country	Farms*	Cellars**	Area (ha) with certified grapes for wine***
Certified by BFDI members:			
Austria	67	4	786
Denmark	1		1
France	438		7'201
Germany	92		781
Italy	157	7	1'948
Liechtenstein	1		2
New Zealand	6		108
Slovenia	12		114
Spain	60	1	2'390
Switzerland	65		410
United Kingdom	10	2	57
United States	58	21	1'533
Certified by ICO/BFD[1]			
Argentina	11	1	423
Chile	15		1'141
Czech Republic	1		53
Georgia	1		2
Greece	5		16
Hungary	4		30
Mexico	1		6
Portugal	4		3
South Africa	2		75
Turkey	1		1
Total	**1'012**		**17'079**

* *Number of farms with grapes for wine*
** *Number of certified cellars without own land*
*** *Area (ha) with certified grapes for wine*
Demeter and "in conversion" certified
Source: Biodynamic Federation - Demeter International e.V.

[1] ICO is the International Certification Office of Biodynamic Federation – Demeter International

The Power of Public Food Procurement: Fostering Organic Production and Consumption

FEDERICA VARINI[1] AND XHONA HYSA[2]

Public food procurement as a lever for sustainable food systems

Governments are estimated to spend around 15 to 20 percent of their Gross domestic product (GDP) on the procurement of goods, work and services, representing a significant part of the global economy (World Bank, 2017). Considering the environmental and societal challenges we are facing today, we can´t afford to miss the opportunity to couple environmental and social conditionality criteria to public sector spending.

Of particular interest to the organic sector is the adoption of sustainability-oriented Public Food Procurement (PFP) policies and standards applied to food and catering services serving public institutions. Such measures can shift buying power to support environmental, health and socio-economic objectives in line with the principles of organic agriculture[3]. As illustrated in the continental cases reported in this chapter, PFP can help create new and stable markets for organic products, stimulate changes in food habits and foster conversion to organic agriculture.

PFP can be implemented at different scales, ranging from single canteens to local, national or regional schemes. The examples reported below represent policies mainly addressing school meals. However, PFP concerns many more institutions purchasing food such as hospitals, correction facilities, and military and governmental apparatuses.

These cases illustrate the importance of coupling PFP guidelines and policies with other support measures such as capacity building for kitchen staff to strategically plan and gradually increase the amount of organic ingredients in the meals while improving nutritional value and reducing meat and food waste. Wholesalers and local supply chains, in which producers are organised, also play a crucial role in ensuring reliable supplies. In addition to fostering organic production, PFP guidelines should also address other dimensions such as fair work conditions, local purchasing and energy consumption. Thus, PFP can be regarded as a concrete policy pathway towards the achievements of multiple Sustainable Development Goals, striving to transform our food systems towards more sustainability.

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

[2] Xhona Hysa, IFOAM – Organics International, 53113 Bonn, Germany, x.hysa@ifoam.bio, www.ifoam.bio

[3] Health, Ecology, Fairness, and Care.

Continental examples

Asia

According to our knowledge, the most well-established public food procurement program in Asia that includes ecological criteria was implemented in **South Korea** in 2011. A recent article (Gaddis & Jeon, 2020) highlights the main steps taken to establish of the Universal Free, Eco-Friendly (UFEF) school lunch program, which today provides free meals to students from kindergarten to high school across the whole country. In the wake of a long tradition of school feeding programs that started in the country in the 1950s with the aim to distribute food aid, the UFEF finally moved away from a system prioritising lower prices. Today the program supports small-scale producers by directly awarding contracts for services under a certain threshold (i.e., up to 16'000 euros in Seoul). It offers meals based on traditional recipes made with unprocessed ingredients and encourages the adoption of eco-friendly[1] and organic products with the highest food safety standards. Since its launch, the program has reached out to an increasing number of students, reaching over 4 million students in 2017 (Gaddis and Jeon, 2020). The UFEF has a total annual budget of over two billion euros, partially financed by the Korean government and partly by the districts and cities, which resulted in non-homogeneous implementation across the country due to budget constraints.

The capital, Seoul, is a leading example. In 2018, the city announced its intention to double the budget earmarked to the program by 2021 in order to extend it to the entire compulsory education system, which has almost one million students and 1300 institutions. The higher budget resulted in a 70 percent increase in certified eco-friendly and organic food ingredients used for high school meals[2]. The program is therefore fostering the transition to more sustainable agricultural practices, encouraging Korean conventional producers to decrease the use of synthetic inputs, such as antibiotics and pesticides, or to convert to organic agriculture in order to obtain the certifications necessary to be included in the school feeding program. However, there are no studies assessing the direct correlation between the establishment of the program and the positive trends visible in the South Korean organic sector in the last five years. Thanks to the wide public support, a replication of this program to other public institutions, such as hospitals and correctional facilities, is now in the pipeline. This upscaling will result in a consistent increase of public demand for eco-friendly products.

Another interesting public food scheme in South Korea is dedicated to pregnant women. This started in January 2020 with the aim of providing eco-friendly food to 45'000 pregnant women and new mothers. With the onset of the COVID-19 pandemic,

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[1] In South Korea, eco-friendly agricultural or livestock products are classified by law into organic agricultural products, organic livestock products, pesticide free products and antibiotic-free livestock products, according to production methods and materials used.
https://www.naqs.go.kr/eng/contents/contents.do?menuId=MN20568

[2] http://english.seoul.go.kr/seoul-provides-eco-friendly-school-meals/

the program was doubled to reach 80'000 women. According to the scheme, the beneficiaries must place orders online on specific websites set up by the local government authorities. The women can order food for up to 360 euros annually, of which 20 percent is self-financed while the central and local governments cover the rest[1].

Information in English regarding other public food procurement programs supporting organic production and consumptions in Asia is rather limited. In order to get a better insight of what governments across the Asian countries are doing to promote these types of policy frameworks, the Asian Local Governments in Organic Agriculture (ALGOA) will launch the ALGOA Center for Public Procurement in New Taipei City in 2021. In the first three years, the center will concentrate on research on organic school meal programs. It will focus on three Asian countries (South Korea, Taiwan and Japan) and link up with some European countries with similar initiatives.

Africa

In Africa, agriculture sustains a significant portion of most African economies, and smallholder farmers can be regarded as the backbones of this sector since they account for over 80% of the continent's food production. Therefore, it isn´t surprising that several African countries started to implement public food procurement initiatives with the aim to generate positive impacts on smallholder livelihoods and promote market creation for locally grown food. In 2003, the African Union, under the food security pillar of the Comprehensive Africa Agriculture Development Programme (CAADP) within the New Partnership for Africa´s Development (NEPAD), started to promote the Home Grown School Feeding (HGSF) programme: "a school feeding model that is designed to provide children in schools with safe, diverse and nutritious food, sourced locally from smallholders". According to Fernandes et al. (2016), by 2014, at least 47 out of 54 countries were realising school feeding programs in Africa, and of these, at least 20 countries[2] were adopting the HGSF programme. The aim of HGSF is to decentralise procurement of foods for school meals and to source food locally from smallholders. It addresses food and nutrition security through the promotion of local food production, simultaneously promoting school enrolment. The HGSF introduced the School Meals Planner Tool, which supports the creation of menus linking culturally appropriate agricultural production and nutrition objectives. In the future, the inclusion of environmental criteria, such as promoting climate-resilient production and particularly organic farming, could – coupled with other support measures – contribute to the conversion to organic practices of smallholders in many African countries.

The **Ghana** School Feeding Program (GSFP) is an example of a decentralised procurement policy created to comply with the African Union's HGSF programme. It

[1] More information about the "Pregnant Women Food Scheme" in South Korea can be found on the IFOAM website at https://www.ifoam.bio/news/launch-pregnant-women-food-scheme-south-korea

[2] NEPAD launched home-grown school feeding pilots in Côte d'Ivoire, Ghana, Kenya, Mali, Nigeria, the United Republic of Tanzania, Ethiopia, Malawi, Mozambique, Senegal, Uganda and Zambia (FAO & WFP, 2018)

was launched in 2005 to improve food security while reducing malnutrition, increasing school enrolment levels and boosting domestic food production (Fernandes et al., 2016). In Ghana, the issue of market development for smallholders is crucial. Thus, one of the objectives of the GSFP is to link the increased demand for agricultural products that could be created by the school feeding program to smallholder farmers' production. The program was also coupled with an intense campaign of awareness-raising and training for caterers, cooks and school directors, to not only teach them how to use the School Meal Planner Tool but also to provide general education on nutrition and food safety issues. The GSFP meal plans, designed by dedicated nutrition departments at the district level, foresee one hot meal per school, per day, made up of local seasonal ingredients. The meals are prepared and served by private caterers, who are also tasked with procuring the raw ingredients from the local market. In accordance with the guidelines of the GSPF, the caterers must procure 80 per cent of raw ingredients from local smallholder farmers (FAO & WFP, 2018). The government compensates the purchase of the ingredients and the work of the caterers through bi-weekly allowances. As of 2016, the program reached over 1.7 million primary school children in over 2000 districts (Mensah, 2018).

Europe

Support through public procurement for organic production and consumption has increased in Europe in the last decade. The importance of this policy measure is expected to grow in Europe; thanks to the newly launched Farm to Fork Strategy (May 2020). The strategy sets a target of "*reaching at least 25 percent of the EU agricultural land under organic farming by 2030*" and anticipates that the Commission will define "*mandatory criteria for sustainable food procurement […] to boost sustainable farming systems, such as organic farming*" (European Commission, 2020). There is, therefore, the expectation that this strategy will create pressure to develop a more uniform and binding system since the current legal framework is still rather patchy and differs across countries.

The vision of the Farm to Fork strategy for public food procurement is embedded in the European Union's (EU) Green Public Procurement (GPP) policy. It is an EU voluntary framework through which public purchasing power is directed towards choosing environmentally friendly goods, services and works, thus investing public money towards sustainable consumption and production. In 2014, a series of Directives[1] were issued to increase flexibility and adoption of Green Public Procurement procedures to obtain *"better value for public money, to deliver better outcomes for societal and other public policy objectives while increasing efficiency of public spending "*, thus taking a step away from the lower price criteria (European Commission, 2017). In October 2019, the Commission published new voluntary *EU GPP guidelines for food, catering services and vending machines*. Among the core criteria to limit the food and catering sector's

[1] Directive 2014/23/EU (concessions), Directive 2014/24/EU (general) and Directive 2014/25/EU (utilities)

environmental impact, organic product sourcing appears as pivotal (European Commission, 2019).

Currently, several public initiatives promoting organic ingredients in school meals exist across Europe. Generally, they have procedures that include adopting a certain percentage of organic products in the meals provided. However, there is no comprehensive database that shows to which extent green criteria, including the use of organic ingredients, are applied across Europe. Yet, across Europe, there are many examples at the national, regional and local level, including those in Austria, Belgium, Denmark, Finland, France, Germany, Denmark, Ireland, Italy, Latvia, Malta, The Netherlands, Slovenia, Spain, Sweden (EPHA & HCWH Europe, 2019; Neto & Gama Caldas, 2018; IFOAM - Organics International, 2017).

One of the most famous examples is in Copenhagen, the capital of **Denmark**. In 2018, organic ingredients accounted for 88 percent of the ingredients in the meals served by the city's 1000 public schools[1]. A key success factor was the effort dedicated to capacity building for kitchen employees, which focused on creating meals with better nutritional value and improved climate and environmental performance. Concretely, this means that the amount of unprocessed ingredients has increased while meat consumption and food waste has decreased, in order to reduce the higher price of meals due to the use of more organic products[2]. It was also crucial to work with national wholesalers to provide more fresh organic products. Public tenders were issued that specifically requested the availability of a wide assortment of fresh organic products, such as meat. Recently, Denmark issued one of the most ambitious climate plans worldwide, aiming to reduce greenhouse gas emissions by 70 percent by 2030. In May 2020, a broad coalition of Danish stakeholders representing thousands of farmers, restaurants and food companies launched a joint proposal for the Danish Climate Plan suggesting using public and private catering services as the driving force to achieve the 70 percent reduction target[3]. One of the strategies proposed is to set as a national policy target, adopting 90 percent organic ingredients in meals provided by all public and private catering services across Denmark by 2030[4] (the current national average for public kitchens is 60 percent).

Italy represents another remarkable example. Here, organic ingredients have been included in school meals since 1986. The first legislation to promote organic products

[1] The City of Copenhagen website: Copenhagen welcomes the UN SDG'S. Available at https://international.kk.dk/artikel/copenhagen-welcomes-un-sdgs

[2] On average it is estimated that the conversion to 100 percent organic ingredients of a school meal implies an increase of 20-30 percent on the final price. It is nevertheless important to highlight that the costs of the basic ingredients often represent only a small portion of the final cost of a meal.

[3] Organic in Public Danish Kitchens and Private Eateries. Organic without boundaries website. Available at https://www.organicwithoutboundaries.bio/2020/06/18/organic-in-public-danish-kitchens-and-private-eateries/

[4] https://paulholmbeck.com/wp-content/uploads/2020/05/Klimavirkemiddel_Klima-og-percentC3percentB8kologiomstilling-i-de-professionelle-kpercentC3percentB8kkener_sendt.pdf

in school canteens was issued in the early 2000s. Furthermore, since 2015, a national law[1] established a requirement for school canteens to source at least 15 percent of meat and 40 percent of other ingredients, such as fruits and vegetables, from certified organic producers. According to the census of Italian organic school canteens performed by BioBank in 2018, the total food catering sector was worth 80.3 billion euros in 2016. Organic catering reached 377 million euros; an increase of 135 percent compared to the previous decade (Bertino et al., 2018). In 2018, more than 1300 institutions were using organic ingredients in their meals. Of these institutions, 25 percent reached 70 to 100 percent organic, accounting for a total of 1.3 million meals served daily. In order to further support this system, Italy issued a ministerial decree[2] in 2018, which awards a gold certificate to canteens that use over 90 percent organic ingredients. The canteens using 70 percent are awarded a silver certification. This award scheme also aims to decrease food waste, increase the use of products from local producers (150 kilometres distance) and introduce educational activities in the schools. Certified organic canteens can request public support from a dedicated budget of 44 million euros for 2018 to 2021. This fund also helps decrease the costs of meals borne by Italian families. The BioBank census concludes that the policy measures positively impacted the adoption of organic ingredients in public kitchens. In 2004 to 2017, the quantity of certified organic raw ingredients increased by 26.4 percent, reaching almost 50 percent at the national level.

A recent article assessing the case of **Sweden** shows that the adoption of policy measures supporting public organic food procurement since 2006 have had a positive impact on the development of organic farmland in Sweden (Lindström et al., 2020). In 2006, a first GPP policy laid down the framework for increasing public sector investments in the food and catering service, targeting 25 percent organic food served in public canteens by 2010. This policy goal was meant to contribute to another political commitment to reach 20 percent organic farmland by the same year. Ten years later, the objective concerning organic food consumption in public institutions was exceeded, reaching 33 percent; however, the organic land area was lagging behind the target, reaching only 15.6 percent.

For this reason, the government decided in 2017 to adopt a more ambitious policy target: to increase the use of organic produce in school canteens to up to 60 percent by 2030, while the organic farmland target was increased to 30 percent. In Sweden, public institutions represent only 4 percent of the demand for organic products. However, the statistical analysis performed by Lindström et al. (2020) showed that public institutions acting together exert sufficient buying power to influence national wholesalers' purchasing choices. This has a positive impact on organic farmland. The research also highlights that PFP should be coupled with direct subsidies since the greatest impact on organic farmland was associated with the significant positive effects of direct payments for conversion to organic production, as provided under the Common Agriculture Policy.

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[1] Law 28th December 2015, n. 221

[2] Law 18th December 2017, n. 14771

Latin America

The most famous and well-studied program promoting organic and agroecological production in Latin America through public procurement is, without a doubt, the Brazilian National School Feeding Program (PNAE), implemented in **Brazil** in 2009. This legal framework stands out among other policy frameworks of this kind for its holistic vision and its ability to combine the supply of healthy and nutritious foods with the strengthening of family farming, the promotion of environmentally friendly products and the enforcement of the right to food. Although PNAE has existed since the early 1950s, its current framework is regulated by (Law 11.947 / 2009, and in Resolution n. 26 de 2013). These laws introduced a series of changes compared to the past program. Emphasis is now on purchasing food not only from local producers but specifically from family farmers, and priority is given to organic or agroecological products. According to the new law, 30 percent of the financial resources for school meals earmarked by the National Fund for Education Development (FNDE) should be spent to purchase food produced by family farmers (Drake et al., 2016). The law also requires that organic products purchased from farmers include a 30 percent price premium. The new legislation also introduced a set of guidelines to improve the nutritional value of the meals. PNAE is one of the few national school feeding programs worldwide to be universal and free, reaching almost all municipalities of Brazil (more than 5300 in 2016). It provides quality meals to more than 40 million students from public education institutions.

Schneider et al. (2016) concluded that the share of products produced by family farmers relative to the total volume of resources allocated to the program has increased since 2011. However, they also emphasised several challenges in including family farmers, for instance, related to logistical issues and incapacity to provide constant supply and meet the demand of large municipalities. Over the years, the experience of PNAE has been acknowledged at an international level by several multilateral organisations, such as the World Food Program and FAO (FAO & WFP, 2018). Recent reports, however, indicate that PNAE is at risk due to substantial budget cuts; first under the Temer government and now under Bolsonaro´s. The policy has also been weakened by the dismantlement of some key bodies, such, as the National System of Food and Nutrition Security (Sisan), the National Board of Food and Nutrition Security (Consea) and the Interministerial Chamber of Food and Nutrition Security (Caisan) (de Amorim et al., 2020). These bodies were the program's vital organs and had the mandate to create formal spaces for social participation through the Food and Nutrition Security Councils (Consea) in order to ensure the implementation of the program at an inter-ministerial level through the adoption of guidelines, planning and budgeting.

North America

In the **USA,** there are currently no uniform public food procurement policies and standards applied at the federal or state level. However, the potential of redirecting public expenditures for catering services towards green procurement practices is enormous. One needs only to look at the National School Lunch Program implemented by the US Department of Agriculture (USDA) which alone allocates more than 9 billion

EUR in public funds to provide meals annually for over 30 million children. Such funds are currently allocated to food and catering services almost indiscriminately without applying environmental or social precautionary principles (Farnsworth et al., 2018).

In this context, the Good Food Purchasing Programme (GFPP) stands out. The GFPP started in 2012 when the Los Angeles Food Policy Council Procurement working group developed the Good Food Purchasing Guidelines for Food Service Institutions. These were adopted by the City of Los Angeles and by the Los Angeles Unified School District through a municipal decree, impacting the serving of approximately 750'000 meals a day. In 2015, in response to the interest from other cities and institutions across the country, the Center for Good Food Purchasing[1] was created. Today, the Center houses the national initiative with the aim to transfer, scale and network the Good Food Purchasing Program across the country. Since then, many institutions have joined the programme; striving to "*create a transparent and equitable food system, which prioritises the health and well-being of people, animals, and the environment*". Today the Center is working with 43 institutions and local coalitions in 16 cities across the country, including Los Angeles, Buffalo, Boston, Austin, Chicago, New York, Oakland, San Diego, San Francisco and Washington DC. Together, these institutions spend nearly 1 billion euros on food each year, following purchasing guidelines that are grounded on five values: local economies, nutrition, valued workforce, environmental sustainability and animal welfare. Through its program, the Center is helping public bodies to institutionalise fair and sustainable food purchasing. Several of the participating cities have not only adopted voluntary guidelines, but they have also succeeded in implementing food policies that mandate the adoption of GFPP for all institutions providing public food services under their jurisdiction.

Additionally, the GFPP established a strategic planning framework for local food policy directors and staff. This planning framework aims to inform, support better choices and improve transparency in sourcing raw materials while accounting for the economic and social sustainability dimension of the food purchased. Finally, the program provides a tool to stimulate food businesses, such as wholesalers, to develop new products and new sourcing practices in accordance with the values of the programme (Farnsworth et al., 2018). GFPP transcends "organic" but gives rightful credit to organic production through its point system for tracking progress, described in the Good Food Purchasing Standards. –In this system, organic is considered a best practice in two categories: environment sustainability and animal welfare.

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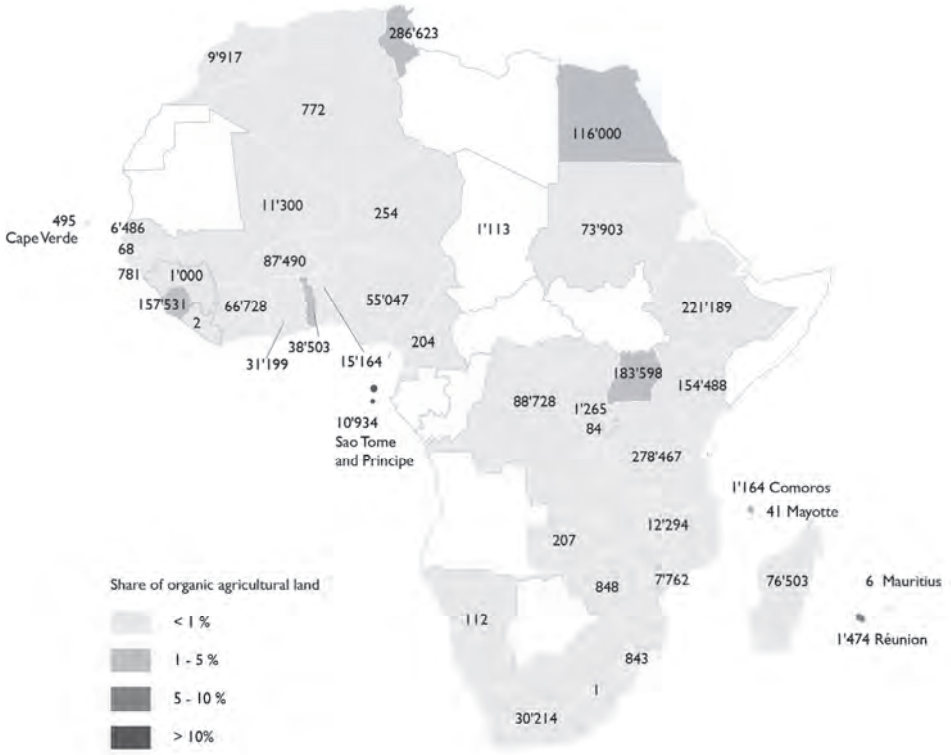
Africa



Map 2: Organic agricultural land in the countries of Africa 2019 (in hectares)

Source: FiBL survey 2021, 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 317

Latest Developments in Organic Agriculture in Africa

DAVID M. AMUDAVI,[1] VENANCIA WAMBUA,[2] ALEX MUTUNG,[3] MOSES AISU[4] AND OLUGBENGA O. ADEOLUWA[5]

The potential of organic agriculture in Africa (now increasingly referred to as ecological organic agriculture, EOA) continues to receive attention among farmers, practitioners, policymakers and other stakeholders to address food insecurity, land degradation, poverty, climate change and resilience to shocks, among other benefits. Despite challenges including the latest COVID-19 pandemic, efforts continue to be made in mainstreaming organic agriculture into policy, national extension systems, marketing and value chain development, curricula of academic institutions and African-led research activities in the continent.

The Ecological Organic Agriculture (EOA) Initiative

Key achievements

Despite the COVID-19 pandemic, the Ecological Organic Agriculture Initiative (EOA-I) realised several achievements during 2020. The Swiss Agency for Development and Cooperation (SDC) approved the 2nd Phase of the initiative for the period 2019-2023 with the support of 6.3 million US dollars. Geographical coverage expanded to include Rwanda as the ninth country. The value chain and market development approach was adopted. Participating partners in all nine countries in Eastern and West Africa selected key value chains under a network of teams approach, which focuses on concentration, coordination and targeting specific groups. The selected value chains included livestock, fruits (bananas, avocado, mangoes, and pineapples), vegetables (tomatoes, potatoes, indigenous vegetables and onions), herbs, legumes (beans, soybean, nuts, sesame and nuts), and cereals (rice, maize, millet and sorghum). The value chains contributed to improved food security, nutrition and income to farmers.

The initiative's databases continued to be strengthened to make research findings and knowledge on EOA available and accessible by various users[6]. About 24 EOA-I practices were promoted during this period. Key practices included the incorporation of farm residues, mulching, cover crops, use of farmyard manure, crop rotation, intercropping, green manure, green fallow, animal manure, nitrogen-fixing plants,

[1] Dr. David Amudavi, Biovision Africa Trust, Nairobi, Kenya
[2] Venancia Wambua, AfroNet, Dar es Salaam, Tanzania
[3] Alex Mutung, AfroNet, Dar es Salaam, Tanzania
[4] Moses Aisu, Network of Organic Agriculture Research in Africa (NOARA), C/O NOAN, University of Ibadan, Nigeria
[5] Olugbenga O. Adeoluwa, Network of Organic Agriculture Research in Africa (NOARA), C/O NOAN, University of Ibadan, Nigeria
[6] For more information, see the EOA website http://eoai-africa.org/research

water conservation, correction of soil pH, soil testing, compost, push-pull management strategy, zero tillage, bio-slurry, liming, cover crops, certification and processing.

At the national level, the EOA-I governance structure brought key ministry officials on board to help govern the EOA and chair the National Steering Committees. In Uganda, the National Organic Agriculture Policy was launched in October 2020. EOA-I partners were among the actors that collaborated with relevant ministries to support the new policy development and approval. At the continental level, focus was put on getting a picture of the status of policy and legislation in support of EOA in Africa, building on the 2019 assessment.

Two studies commissioned by the Africa Union Commission (AUC) and the Biovision Africa Trust in 2019 showed that of 55 African countries:

- Three countries (Morocco, Tunisia and Uganda) have an Ecological Organic Agriculture (EOA) policy, organic production standards, strong government support for EOA and a well-developed National Organic Agriculture Movement (NOAM).
- Fourteen have some government support with policy development underway and strong National Organic Movements (NOAMs)[1].
- Another ten have strong civil society organisations, significant EOA production, including some export, but little government support.
- A further 11 have some civil society capacity, no organic guidelines, little or no export and not much government support.
- Finally, there are 17 countries with minimal institutional capacity, no government support and no exports.

Much of Africa's development budget is spent on food safety nets and Farm Input Support Programmes (FISP). FISP focus on cheap fertilisers, hybrid seeds and agrochemical inputs, which are largely unsustainable and ineffective, leading to wasteful resource use. However, with a long-term vision, some elements of a FISP approach can contribute to sustainable development. Mauritius is the only African country to have focused on the positive elements of FISP to support compost making, leading to long-term soil fertility improvement and elongating the soil's production capacity, while at the same time empowering farmers to produce their own low-cost fertiliser. Lessons can be learned from long-term research in Britain, Denmark, Switzerland and the United States, which shows that after a few years of organic

[1] Two studies were commissioned by the African Union Commission (AUC) to assess the status of policy towards EOA development in North, Central, West and Southern Africa (Auerbach 2013) and by the Biovision Africa Trus progress in East Africa in 2019 undertaken by Dr. Edith Kareko-Munene (CITE). Tthe two studies were integrated in 2020 and supplemented with country (Eastern Africa) and regional policy briefs being prepared.

management, the soil's productivity can be increased in a robust way, improving soil water- and nutrient-holding capacity.

The challenges facing the realisation of favourable policy and legislation for EOA include:

- limited material capacity (e.g. financial and technological constraints) and human resources,
- limited knowledge and technical expertise in Eastern Africa of best practices and management for organic practices (soil fertility, weed control, pest or disease control);
- poor policy coherence (no policy or EOA guidelines are available, lack of adequate incentives, poor/insufficient cross-sectoral coordination, incentives and subsidies available for conventional farmers, e.g. fertilisers, hybrid seed);
- weak integration of by smallholder farmers and youth (top-down policymaking, one-way extension services, gender imbalances).

The Knowledge Center for Organic Agriculture in Africa

The Knowledge Center for Organic Agriculture in Africa (KCOA) is part of the BMZ[1] Special Initiative ONE WORLD - no Hunger with a project implementation period from 01/2019 – 06/2024 and a budget of 16 million euros (23 million US dollars). It is coordinated by GIZ, the German Corporation for International Cooperation. KCOA aims to develop knowledge hubs in West, East, North and South Africa, and later in Central Africa. These hubs are introduced as an innovative strategy for promoting organic agriculture with actors in Africa. This will be achieved through three main strategies:

Integrated Knowledge Management Systems Strategy: This involves collecting, adapting, and validating knowledge and ensuring that it is made widely available in user-friendly formats for different target groups in the region. The knowledge assembly draws on evidence (research findings), experiential and indigenous knowledge and values that farmers, researchers, policymakers and service providers use in their practice and decision making. This further involves validation of knowledge of available research and practical findings on EOA. The hubs generate content on important thematic areas including nutrition and food security, climate change, water management, resilience and sustainability of farming systems, markets and market development and technology transfer and learning. The communication tools include knowledge databases/websites, publications, videos, Information and communications technology (ICT) applications and social media (Facebook, Twitter, Flickr and YouTube).

[1] BMZ is the German Federal Ministry for Economic Cooperation and Development (Bundesministerium für wirtschaftliche zusammenabreit und Entwicklung). More information is available on https://www.bmz.de/en/index.html .

Dissemination and Capacity Building Strategy: This involves developing a holistic, context-specific and gender-sensitive extension system for knowledge sharing with various target groups along the value chain, based on the target groups' needs and constraints. It is intended to have a multiplier effect throughout the value chain. Regional and country training programmes (*Training of Teams of Trainers/Facilitators* will lead to multipliers (i.e. innovators, entrepreneurs, model farmers, extensionists), who can show others how to access and use knowledge in the repositories, how to use the various tools to disseminate the knowledge to diverse target groups and how to catalyse and strengthen local markets supported by local affordable certification systems.

Market Systems Development and Networking Strategy: This involves networking and facilitating market linkages to create incomes, provide services, and improve livelihoods for farm households and other community members. To promote complementary and shared learning, the strategy is linked to other existent initiatives, such as the EOA-I and its country organisations, the Network of Organic Agriculture Researchers in Africa (NOARA), the Forum for Agricultural Research in Africa (FARA), the FARA eRails network on knowledge exchange for agriculture in Africa and the GIZ Green Innovation Centers.

This strategy aims to build the capacity and resilience of local systems, leveraging the incentives and resources of the private sector, ensuring the beneficial inclusion of smallholder farmers and stimulating change and innovation that will grow beyond this project's life.

The strategy involves:

- A Business Development Services approach to link target groups to service providers (for inputs, marketing, training, information, technology development and transfer) and making markets work for the poor;
- Certification and standards within context-adapted Participatory Guarantee Systems (PGS) and third-party certification; and
- A value chain approach focusing on strategic value chains and taking into account the specific needs of the value chain actors.

The countries currently involved are:

- **West Africa:** Senegal, Benin, Gambia, Mali, Nigeria;
- **Eastern Africa:** Uganda, Kenya, Rwanda, Tanzania;
- **Southern Africa:** Zambia, Namibia, South Africa, Malawi;
- **Northern Africa:** Egypt, Morocco, Tunisia; and
- **Central Africa:** Cameroon and others to be confirmed.

Various partners are involved including regional and country partners (e.g. Biovision Africa Trust and PELUM Uganda for Eastern Africa, the Sustainability Institute for South Africa, ENDA ProNat, FENAB & Agrecol Afrique for West Africa) and international partners (IFOAM - Organics International, Access Agriculture, the Research Institute of Organic Agriculture FiBL and the International Centre of Insect Physiology and Ecology (ICIPE)).

Institutional Developments

The Continental Steering Committee (CSC) of the African Union (AU)-led EOA-Initiative[1] has continued to provide strategic guidance and patronage for the implementation of EOA in Africa, despite the challenges brought about by the COVID-19 pandemic in Africa from March 2020. Several key achievements were realised.

In 2020, the CSC, at its 13th and 14th meetings, commissioned the secretariat, which is hosted by the Biovision Africa trust, to develop EOA indicators. A technical working group, which was established for this purpose, has since produced a concept note.

The 14th CSC further endorsed the decision to investigate the possibility of having a continental EOA certification system and see how stakeholders can benefit from the recently launched Africa Continental Free Trade Area. The secretariat will mobilise stakeholders and implementing partners to meet with the African Organization for Standardisation to discuss the opportunities available for certification and how best to facilitate the certification process. Further, in elaborating principles and practices of the EOA-I, the secretariat should develop a strategy paper on how to adapt the ten FAO principles on agroecology into EOA activities.

The CSC further requested its secretariat to draft terms of reference for a rapid assessment of the impact of the COVID-19 pandemic on organic and conventional farming systems. It will look at how responsive and resilient farmers are in coping with the pandemic to inform measures for mitigation and policy actions. This study will be undertaken in the first quarter of 2021, and results will be shared widely. The CSC also agreed to strengthen the CSC Secretariat in terms of knowledge management, policy and advocacy

The African Union's Department of Rural Economy and Agriculture (DREA) organised a virtual workshop of key stakeholders in seed sector development in Africa on September 4, 2020, under the umbrella of the African Seed and Biotechnology Platform. The general objective of the meeting was to hold sector-wide consultations with key seed stakeholders in Africa on the operationalisation of the governance structure of the African Seed and Biotechnology Programme. Following spirited negotiation of the CSC technical working group on seed systems, the EOA-I was endorsed to be part of the Steering Committee of the African Seed and Biotechnology Platform to contribute to the overall governance of programs on seed systems and capacity development in Africa. The EOA-I will also contribute to other technical areas such as seed legislation, seed regulations or biosafety regulations. This development marks another milestone for the EOA-I seed policy development in Africa. Through this, the EOA-I finds itself inside important seed discussions in the continent, giving it the opportunity to champion organic seed policies and programmes.

[1] Secretariat: Biovision Africa Trust-https://biovisionafricatrust.org

Data on the status of organic agriculture

Data on organic agriculture in Africa remains scanty and perhaps not precise. The survey tool developed by the EOA CSC in collaboration with IFOAM – Organics International, to support the gathering of relevant data[1] on programmes and initiatives was not applied. The tool was expected to 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. An important step in this direction was taken with the development of some relevant indicators to monitor the performance of EOA in the continent, which was reported on in CAADP's biennial review reporting process. This has been further elaborated by a complementary framework addressing key priority area 5 of the Policy and Programme Development of EOA, utilising six criteria:

1. The extent to which a national policy is in place and supported by a budgetary allocation.
2. The extent to which organic regulations have been promulgated and implemented.
3. The extent to which national standards and certification are in place.
4. The extent of government support to the organic sector.
5. The degree to which civil society is involved in the development of the EOA sector.
6. The performance of the domestic and export EOA market.

These criteria will be used to locate and track a country's development on EOA and assess and report the multiple components of a country's development pathway. Processes and outcomes need to be monitored systematically in order to support the transition towards sustainable food production as part of sustainable development in Africa. Monitoring and evaluation indicators shall be linked to government and African Union budgets so that there are financial incentives associated with environmentally responsible production. The criteria, desired outcomes and process indicators should help both governments and EOA stakeholders keep track of progress within the sector and allow the African Union and the EOA-I Continental Steering Committee to evaluate the overall progress towards sustainable development.

Achievements by the African Organic Network (AfrONet)

The African Organic Network (AfrONet) is a custodian of the African organic movements and organic sector development, which aims to strengthen and support national, regional and continental networks, overseeing the development and growth of the Ecological Organic Agriculture (EOA) Initiative for Africa. It is a member of the EOA's Continental Steering Committee and Regional/Cluster Steering Committees.[2]

[1] The Survey on EOA initiatives in Africa is available at https://www.surveymonkey.de/r/C7JQ537

[2] 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).

AfrONet has been bringing together all the networks, partners, and other stakeholders under the platform of the African Organic Conference (AOC). Morocco shall be hosting the 5th AOC at Marrakesh in November 2021.

The year 2020 saw AfrONet take on efforts to promote greener agriculture in Africa through the inauguration of the 'Innovative Institutions for Ecological Organic Agriculture in Africa' (IIABA) financed by the French Development Agency (AFD). The project aims to support the strengthening of National Organic Agriculture Movements. AFD has allocated a 1.5 million euro grant to AfrONet and its partners to scale up ecological and organic agriculture in Tanzania, Uganda, and Morocco. The partners will implement institutional innovations and consolidate the capacities of AfrONet and its members. Main areas of action will involve building innovative markets, Participatory Guarantee Systems (PGS) and public policy analysis. The action 'building innovative markets' aims to establish conducive and accommodative opportunities for farmers of all levels to have platforms to sell their products to willing buyers through formal and informal markets. The project partners include the Moroccan Interprofessional Federation for Organic Agriculture (FIMABio), the National Organic Agriculture Movement of Uganda (NOGAMU), the Moroccan Network of Agroecology Initiatives (RIAM), Tanzania Organic Agriculture Movement (TOAM), the French Agricultural Research Centre for International Development (CIRAD) and the French National Research Institute for Agriculture, Food, and Environment (INRAE).

AfrONet has taken steps to strengthen its human resources by recruiting more personnel to improve its capacities to execute duties across the continent. This has been made possible by the grant to AfrONet by the French Development Agency (AFD).

NOGAMU and other actors in Uganda participated in the launch of the National Organic Agriculture Policy in September 2020 courtesy of financial support from the 'Innovative Institutions for Ecological Organic Agriculture in Africa' (IIABA) project. NOGAMU has disseminated the National Organic Agriculture Policy in four major regions of Uganda (Western, Eastern, Northern and Central) in preparation for the development of the Organic Agriculture Bill to be presented to the Ugandan parliament.

AfrONet has reached out to the organic movement of the Democratic Republic of the Congo, and activities have been planned for 2021, which include linking the partner in the Congo to the EOA-Initiative.

AfrONet's regional affiliates also achieved various milestones in 2020. Planning for the 6th West African Organic Conference (WAOC) to be held in Burkina Faso from October 13 to 16, 2021, kick-started under the leadership of the ECOWAS Commission-led

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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.

Regional Planning Committee. The committee includes significant organisations working in the region. The Local Organizing Committee in Burkina Faso is anchored by CNABio with the Ministry of Agriculture's support.

The initial draft of a harmonised organic agriculture standard by Participatory Guarantee System (PGS) in West Africa to facilitate trade across the region was achieved and is ready for validation and approval by stakeholders in 2021. Also, work is in progress on BioWest Africa Fair - an annual regional organic agriculture exhibition/ trade fair to be mainstreamed into the regional agricultural exhibition by the Economic Community of West African States (ECOWAS) Commission, the West African Center for Agricultural Research and Development (Centre Africain pour la Recherche et le Développement Agricoles/West) and the Central African Council for Agricultural Research and Development.

Preparations started for the 5th African Organic Conference in Morocco, and FIMABIO, the Organic Federation of Morocco, an important actor coordinating producers, processors and distributors of organic products, will take a key role of coordination. This will strengthen INRA Morocco's planned four-year research program on Organic and Ecological Agriculture (2021-2024), to be funded by the Moroccan government along with FIMABIO.

The Network of Organic Agriculture Researchers in Africa (NOARA)

NOARA is a network established by African organic agriculture researchers. The network is officially registered and hosted in Nigeria with a Board of Trustees. The vision of NOARA is Africa with zero hunger, poverty eradicated, improved livelihoods and a sustained ecosystem through innovative organic and ecological agriculture research.[1]

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; mobilising 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 the reporting year, NOARA published the Proceedings the 5th West Africa Organic Conference hosted by Ghana and worked on Volumes 3 and 4 of the African Journal of Organic Agriculture and Ecology (AJOAE). NOARA also published the maiden edition of its bulletin – African Organic Agriculture focusing on organic, ecological, and botanical solutions to COVID-19 and 5G issues. NOARA also had its first and second biannual meetings virtually in June and December 2020, respectively and marked the

[1] For more information see www.noara.bio

2020 World Food Day with a key presentation by Prof. Dr Gerold Rahmann (the President of the International Society of Organic Agriculture Research (ISOFAR)).

The development of the demand-driven Organic Agriculture Research Agenda for Africa 2030 with a multi-stakeholder approach, is yet to be fully achieved due to funding limitations. However, 60 percent of the project has been achieved through support by NOARA members and some partners. NOARA hopes to complete the project in 2021 for uptake by researchers, policymakers and development partners in the area of organic and ecological agriculture in Africa.

Outlook

Increased research and development activities targeted towards organic production hope to unlock the sector's potential for millions of smallholder farmers and their families. Drawing on growing evidence and implementing innovations provide opportunities for organic agriculture to enhance productivity, resilience, and profitability of smallholder farming in Africa. Making investments to research and development of ecologically sustainable systems and working on markets for organic produce would guarantee sustainable food systems in Africa. Therefore, the necessary intensification of agricultural production in Africa should be ecological, maintain ecosystem services, and restore, build, and maintain 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 organisations, development partners and the private sector to invest resources in research, policy and programmes and establish platforms for experience sharing, learning and collaboration, thereby building the basis for sustainable, long-term food and nutrition security and poverty reduction.

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Africa: Current Statistics

Claudia Meier,[1] Bernhard Schlatter,[2] Olivia Keller[3] and Jan Trávníček[4]

There were more than 2.0 million hectares of organic agricultural land in Africa in 2019, representing 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 more than 176'000 hectares or 9.5 percent compared to 2018, and it increased by almost 2 million hectares since 2000. In 2019, 42 African countries reported data on organic activities. Since 2017, Tunisia has been the country with the largest organic area, with almost 287'000 hectares. Uganda remained the country with the highest number of organic producers, with over 210'000 producers in 2019, followed by Ethiopia with nearly 204'000 producers and Tanzania with nearly 149'000 producers. For at least the last ten years, the island state of São Tomé and Príncipe has been the country with the highest organic share of the total agricultural land, reaching a share of 24.9 percent in 2019. For the first time in 2019, Sierra Leone and Réunion (France) were among the top three countries with the highest organic share, reaching 4 percent and 3.1 percent, respectively. Egypt was right below with an organic share of 3.0 percent. So was Tunisia with an organic share of 2.9 percent.

Land use

In 2019, land use information was available for more than 91 percent of the organic agricultural area in Africa. Almost two-thirds of all organic agricultural land was used for permanent crops (almost 1.3 million hectares). Almost 30 percent was used for arable crops (nearly 536'000 hectares), and only 1.3 percent (nearly 27'000 hectares) was grassland/grazing area.

Tunisia (nearly 260'000 hectares, mainly olives), Ethiopia (over 160'000 hectares, mainly coffee), Sierra Leone (nearly 158'000 hectares, mainly cocoa), Kenya (nearly 110'000 hectares, mainly nuts), and Tanzania (nearly 107'000 hectares, mainly coffee) had the largest organic permanent crop areas.

As in previous years, coffee was the key organic permanent crop in Africa in 2019, with over 330'000 hectares reported, representing 12.5 percent of the total coffee area of the continent and 47 percent of the world's organic coffee area. In 2019, the largest organic coffee areas were in Ethiopia (over 160'000 hectares) and Tanzania (almost 82'000 hectares). Since 2010, the organic coffee area in Africa has almost doubled. The other key organic permanent crops in the continent in 2019 were olives (nearly 244'000 hectares), cocoa (more than 217'000 hectares), and nuts (nearly 187'000 hectares; mainly

[1] Claudia Meier, 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] Olivia Keller, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[4] Jan Trávníček, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

cashew nuts). Organic olives were grown on nearly 244'000 hectares, representing 7.3 percent of the continent's olives area and 28 percent of the world's organic olives area. Nearly all of the organic olives areas were in Tunisia (over 241'000 hectares). Since 2010, the organic olive area in Africa has doubled. Organic cocoa was grown on more than 217'000 hectares, representing 2.7 percent of the continent's cocoa area and 60 percent of the world's organic cocoa area. The largest organic cocoa areas were in Sierra Leone (nearly 80'000 hectares) and in the Democratic Republic of the Congo (nearly 72'000 hectares). Since 2010, the organic cocoa area grew more than 7-fold. Organic nuts were grown on nearly 187'000 hectares (mainly cashew nuts), representing 3.8 percent of the continent's nuts area and 31 percent of the world's organic nuts area. The largest organic nuts areas were in Kenya (nearly 70'000 hectares), Côte d'Ivoire (over 51'000 hectares), and Burkina Faso (nearly 36'000 hectares). Since 2010, the organic nuts area in Africa grew more than 9-fold.

The largest organic arable crop areas in 2019 were in Tanzania (over 171'000 hectares, mainly textile crops), Egypt (over 97'000 hectares, mainly medicinal and aromatic plants), and Uganda (nearly 69'000 hectares, mainly oilseeds).

As in previous years, the key organic arable crop in 2019 was oilseeds (mainly sesame), grown in 19 different countries of Africa, covering an area of almost 184'000 hectares, representing 0.6 percent of the total oilseeds area of the continent and 12 percent of the world's organic oilseeds area. The largest organic oilseeds areas were in Uganda (nearly 45'000 hectares; mainly sesame), Burkina Faso (over 34'000 hectares; mainly sesame), and Ethiopia (over 33'000 hectares; only sesame). Since 2010, the organic oilseeds area in Africa has grown nearly 5-fold. Other key organic arable crops in Africa in 2019 were textile crops (almost exclusively cotton) and cereals (including millet, wheat, and chia). Organic textile crops covered an area of almost 86'000 hectares, representing 1.8 percent of the total textile crops area in the continent and 47 percent of the world's organic textile crops area. The largest organic textile crop areas were in Tanzania (over 68'000 hectares). Since 2010, the organic textile crop area in Africa almost tripled. Organic cereals covered an area of more than 74'000 hectares, representing 0.1 percent of the total cereals area in the continent and 1.4 percent of the world's organic cereal area. The key producing country of organic cereals was also Tanzania (nearly 51'000 hectares; no further crop details). Since 2010, the organic cereal area in Africa multiplied by a factor of 21.

Producers

In 2019, there were more than 850'000 organic producers in Africa. The countries with the highest number of organic producers were Uganda (over 210'000), Ethiopia (nearly 204'000), and Tanzania (nearly 149'000). It can be assumed that the total number of producers is higher because some countries only report the number of farm enterprises/companies, excluding the number of farmers/ smallholders.

Wild collection

Wild collection has an important role in Africa, with more than 16.3 million hectares certified as organic in 2019. Zambia was the country with the largest area (3.2 million

hectares, mainly beekeeping), followed by Namibia (over 2.6 million hectares, mainly devil's claw), Tanzania (over 2.4 million hectares, exclusively beekeeping), South Africa (nearly 1.8 million hectares, mainly rose hips and medicinal and aromatic plants), Lesotho (nearly 1.7 million hectares, mainly rose hips), and Mozambique (nearly 1.3 million hectares, exclusively baobab fruit). Medicinal and aromatic plants, such as devil's claw (*Harpagophytum procumbens*), were the commodities that had the largest area (nearly 3.6 million hectares), followed by rose hips (nearly 2.7 million hectares). For beekeeping 5.3 million hectares were reported. Zambia is the country with the largest wild collection area used for organic beekeeping with 2.5 million hectares, representing 50 percent of the total beekeeping area.

For more information about the African figures, see data tables for Africa, page 194.

Organic Agriculture in Africa: Graphs

Africa: The ten countries with the largest organic area 2019
Source: FiBL survey 2021

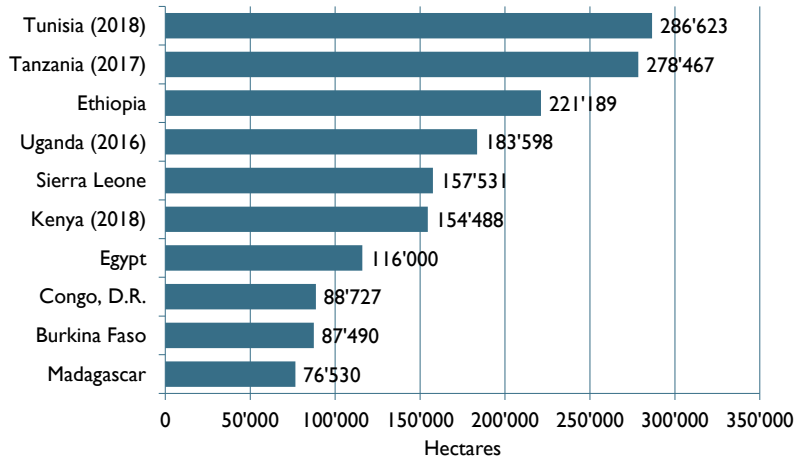

Figure 59: Africa: The ten countries with the largest organic agricultural area 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Africa: The countries with the highest organic share of total agricultural land 2019
Source: FiBL survey 2021

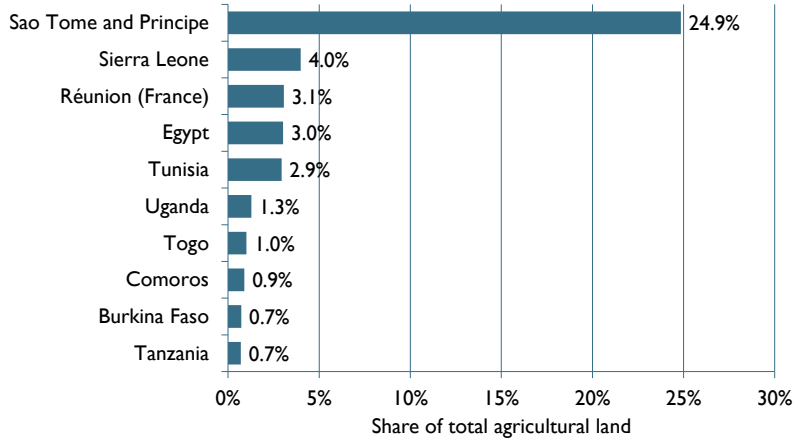

Figure 60: Africa: The countries with the highest organic share of total agricultural land 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Africa: Development of organic agricultural land 1999-2019
Source: FiBL-IFOAM-SOEL-Surveys 2001-2021

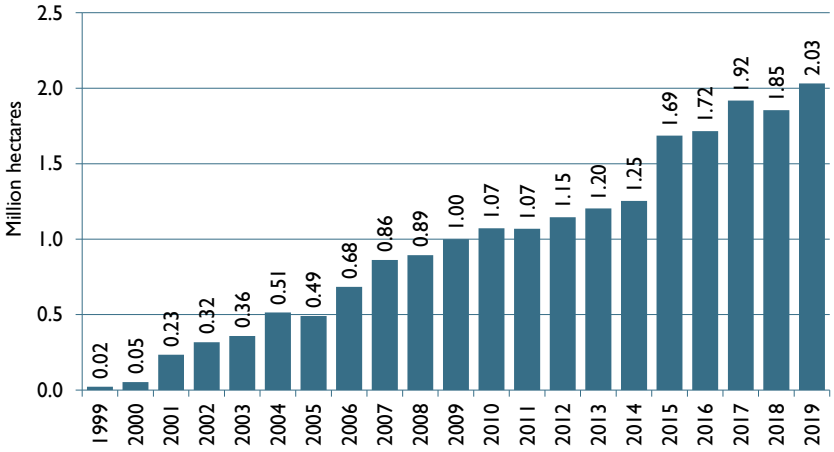

Figure 61: Africa: Development of organic agricultural land 1999-2019

Source: FiBL-IFOAM-SOEL-surveys 2001-2021

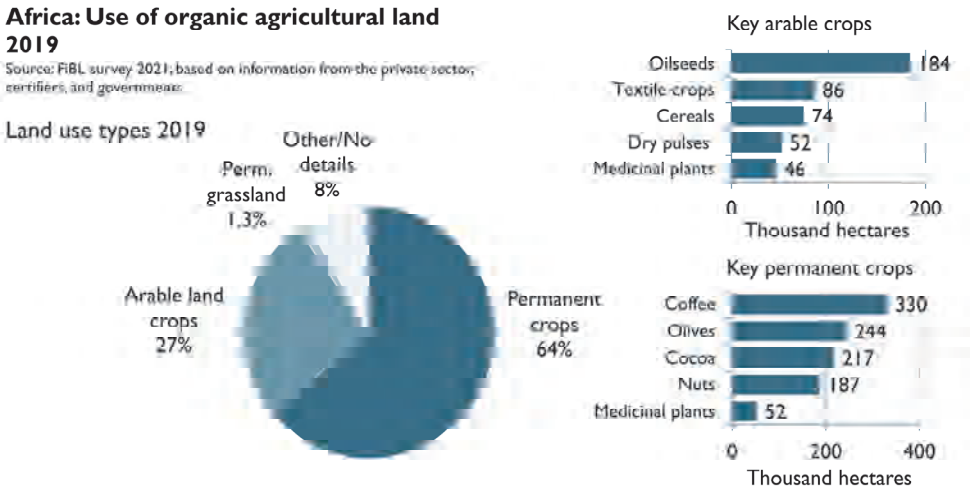

Figure 62: Africa: Use of organic agricultural land 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

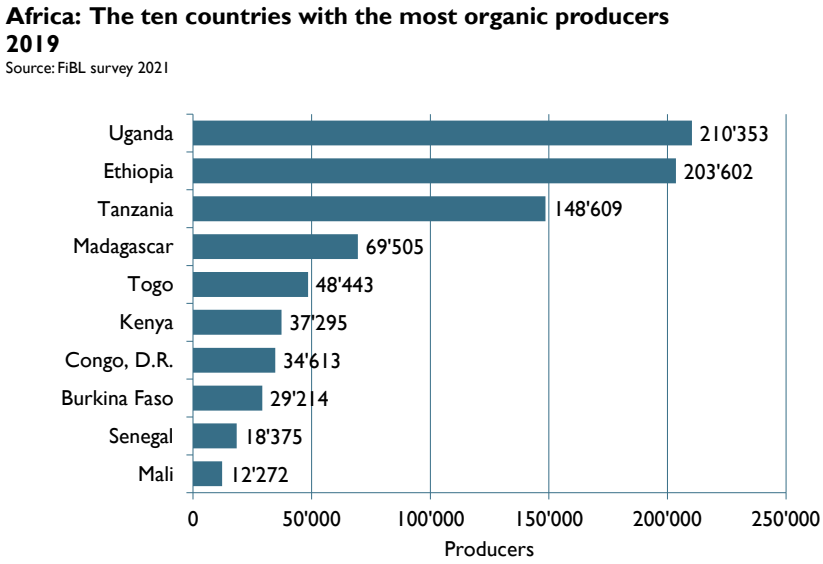

Figure 63: Africa: The ten countries with the largest number of organic producers 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Organic Agriculture in Africa: Tables

Table 51: Africa: Organic agricultural land, organic share of total agricultural land and number of organic producers 2019

Country	Area [ha]	Share of total agri. land [%]	Producers [no.]
Algeria	772	0.002%	64
Benin	15'164	0.4%	5'170
Burkina Faso	87'490	0.7%	29'214
Burundi	84	0.004%	25
Cameroon	204	0.002%	499
Cape Verde	495	0.6%	1
Chad	1'113	0.002%	
Comoros	1'164	0.9%	851
Côte d'Ivoire	66'728	0.3%	2'905
Congo, D.R.	88'727	0.3%	34'613
Egypt	116'000	3.0%	970
Eswatini	843	0.1%	2
Ethiopia	221'189	0.6%	203'602
Gambia	68	0.01%	1
Ghana	31'199	0.2%	3'199
Guinea	1'000	0.007%	
Guinea-Bissau	781	0.1%	1
Kenya	154'488	0.6%	37'295
Liberia	2	0.0001%	1
Madagascar	76'530	0.2%	69'505
Malawi	12'294	0.2%	5
Mali	11'300	0.03%	12'272
Mauritius	6	0.007%	19
Mayotte	41	0.2%	11
Morocco	9'917	0.03%	277
Mozambique	7'762	0.02%	149
Namibia	112	0.0003%	13
Niger	254	0.001%	2
Nigeria	55'047	0.1%	319
Réunion (France)	1'474	3.1%	38
Rwanda	1'265	0.07%	6'990
São Tomé and Príncipe	10'934	24.9%	3'563
Senegal	6'486	0.1%	18'375
Sierra Leone	157'531	4.0%	5'502
South Africa	30'214	0.03%	154
Sudan	73'903	0.1%	5
Tanzania	278'467	0.7%	148'609
Togo	38'506	1.0%	48'443
Tunisia	286'623	2.9%	7'456
Uganda	183'598	1.3%	210'353
Zambia	207	0.001%	5
Zimbabwe	848	0.01%	8
Total*	**2'030'830**	**0.2%**	**850'490**

Source: FiBL survey 2021, 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 52: Africa: All organic areas 2019

Country	Agri-culture [ha]	Forest [ha]	Grazed non agri. land [ha]	Wild collection [ha]	Other non agri. land [ha]	Total [ha]
Algeria	772			628		1'400
Benin	15'164					15'164
Botswana				2		2
Burkina Faso	87'490			265'582		353'072
Burundi	84					84
Cameroon	204			112'000		112'204
Cape Verde	495					495
Chad	1'113			5'800		6'913
Comoros	1'164					1'164
Côte d'Ivoire	66'728					66'728
Congo, D.R.	88'727					88'727
Egypt	116'000					116'000
Eswatini	843			564		1'406
Ethiopia	221'189			7'629		228'818
Gambia	68					68
Ghana	31'199			51'720		82'919
Guinea	1'000			1'075		2'075
Guinea-Bissau	781					781
Kenya	154'488			703'886		858'374
Lesotho				1'667'028		1'667'028
Liberia	2					2
Madagascar	76'530			12'195		88'725
Malawi	12'294					12'294
Mali	11'300			9'254		20'554
Mauritania				2'800		2'800
Mauritius	6					6
Mayotte	41					41
Morocco	9'917			268'129		278'046
Mozambique	7'762			1'287'690		1'295'452
Namibia	112			2'609'108		2'609'220
Niger	254					254
Nigeria	55'047					55'047
Réunion (France)	1'474					1'474
Rwanda	1'265			42'377		43'642
São Tomé and Príncipe	10'934					10'934
Senegal	6'486			41'064		47'549
Sierra Leone	157'531					157'531
Somalia				822'300		822'300
South Africa	30'215	887		1'778'702	3'028	1'812'833
Sudan	73'903	451		604'718		679'073
Tanzania	278'467			2'403'700		2'682'167
Togo	38'506			6'470		44'976
Tunisia	286'623	48'956	22'595	48'958		407'132
Uganda	183'598			78'684		262'282
Zambia	207			3'200'000		3'200'207
Zimbabwe	848			309'037		309'885
Total	**2'030'830**	**50'295**	**22'595**	**16'341'099**	**3'028**	**18'447'847**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Table 53: Africa: Land use in organic agriculture 2019

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		133'046
Arable land crops	Cereals	74'344
	Dry pulses	51'846
	Fallow land, crop rotation	19'874
	Fresh vegetables and melons	40'055
	Industrial crops	92
	Medicinal and aromatic plants	45'832
	Oilseeds	183'884
	Plants harvested green	7'472
	Root crops	22'548
	Seeds and seedlings	7
	Strawberries	679
	Sugarcane	2'622
	Textile crops	85'603
	Arable crops, other	1'096
Arable land crops total		535'953
Cropland, no details		31'112
Other agricultural land		3'885
Permanent crops	Berries	307
	Citrus fruit	10'378
	Cocoa	217'169
	Coconut	25'245
	Coffee	330'253
	Fruit	8'738
	Fruit, temperate	15'091
	Fruit, tropical and subtropical	47'484
	Grapes	3'401
	Medicinal and aromatic plants, permanent	52'222
	Nurseries	3
	Nuts	186'833
	Olives	243'552
	Tea/mate, etc.	2'906
	Permanent crops, other	156'282
Permanent crops total		1'299'865
Permanent grassland		26'968
Total		**2'030'830**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Table 54: Africa: Use of wild collection areas 2019

Land use	Area [ha]
Apiculture	2'525'325
Coffee, wild	8'666
Forest honey	2'500'000
Forest products	685
Fruit, wild	2'367'589
Medicinal and aromatic plants, wild	3'552'647
Mushrooms, wild	11
Nuts, wild collection	341'020
Oil plants, wild	31'692
Rose hips, wild	2'692'203
Seaweed	2
Wild collection, no details	2'321'260
Total	**16'341'099**

Source: FiBL survey 2021, 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 2019

Source: FiBL survey 2021 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 317.

Developments in the Organic Sector in Asia in 2020

SHAIKH TANVEER HOSSAIN,[1] JENNIFER CHANG[2] AND VIC ANTHONY JOSEPH FABRE TAGUPA[3]

Together with the rest of the world, Asia has suffered a lot due to the effects of COVID-19. As traditional markets, schools, offices and other establishments were shut down, every stakeholder across the supply chain was affected in some way. However, the resiliency of many countries in Asia was highlighted, as they searched for ways to mitigate the effects of the pandemic. In South Korea, school closures meant the cessation of school meals, which was a significant income source for many organic farmers. In response, a Countermeasures Committee for COVID-19 was established, providing thousands of food packages of environmentally-friendly farm products to more than 6'000 self-quarantined people.

There have been major policy developments related to the organic sector in some Asian countries. In Japan, there was a major development in the Basic Plan for Agriculture and Management, aiming to triple the number of organic farmers and organic land by 2030. In Indonesia, The National Medium-Term Development Plan IV (2020-2024) will increase the policies related to organic agriculture - under the '1000 organic villages' program through the continuous collaboration of various government ministries. Finally, the Philippines had one of the most significant milestones in organic agriculture with the amendment of the Organic Act of 2010, including Participatory Guarantee Systems (PGS) under the country's national organic standards.

The pandemic has highlighted the importance of healthy food, and consumers are changing their lifestyles towards healthy and responsible consumption. According to a study by Singapore-based startup Ai Palette, Indonesia and the Philippines saw a significant increase in the demand for fresh produce, with the latter registering a 444 percent year-on-year growth for fresh produce over frozen and canned varieties[4]. In China, a commerce giant predicted a rise in healthy food options as a result of the pandemic. The organic sector became a hotspot for investment, and up to 89 certification bodies were established in China in 2020 alone.

Bangladesh

In Bangladesh, some products have gained importance in the organic sector, including organic jute, cotton, and livestock, among others. The Bangladesh Jute Research Institute (BJRI) and the Jute Diversification Promotion Center (JDPC) have developed a herbal drink technology made from organic jute leaf and has marketed the product as Jute Green Tea.'

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[1] Ambassador, IFOAM Organics International and Former Vice-President, IFOAM Asia
[2] Executive Director, IFOAM Asia
[3] Chief Operations Officer, IFOAM Asia
[4] WARC (6 December, 2020). COVID-19 shifts food trends in Southeast Asia. Available at https://www.warc.com/newsandopinion/news/covid-19-shifts-food-trends-in-southeast-asia/43717

A project has been launched in collaboration with Intertrop, a German-based jute product manufacturing company with 7.5 hectares of land and 41 cooperative farmers in Lemubari, Manikgonj, to produce jute organically and to certify it under the European regulations. In 2018-19, around 2.5 metric tons of organic jute tea were exported to Germany.[1] A product with excellent potential is a jute bag called 'Sonali (golden) Bag,' a biodegradable and environment-friendly product.

According to the Global Organic Textile Standard (GOTS) latest 2019 report, Bangladesh is now leading the global organic textile production and topped the list of organic textile-producing countries in terms of total numbers of GOTS-certified facilities. In 2019, 505 Bangladeshi factories received the GOTS-certification, followed by India (438) and Europe (396). Currently, Bangladesh has 1'194 organic textile facilities, and the growth rate of GOTS certification was more than 73 percent, which is the highest globally, simultaneously with the Netherlands[2]. Bangladesh has also imported nearly eight million bales of cotton annually, including six percent organic cotton imported from India and the United States[3]. The Cotton Development Board (CDB) recently launched a program to produce organic cotton to fulfil Bangladesh's organic cotton demand.

Organic livestock is an emerging sector in Bangladesh. Government, non-governmental organisations (NGOs) and new entrepreneurs have developed livestock enterprises that follow organic practices in the last two years. Supermarkets in big cities have started an 'Organic corner' to sell organic products. Many young entrepreneurs were also observed to have started online businesses to sell high-valued organic fruits, vegetables and even livestock products to health-conscious consumers.

Cambodia

Cambodia has been a focus for international development interventions since the early 1990s. After thirty years of civil war, agricultural production was primarily subsistence farming until recent years, with rice as the main crop for self-consumption. When "value-chain" became the trend word in the development sector in 2010, international development actors' interest turned to organic products. With no equivalent word for "organic" in the local language, the concept of "organic" itself was not comprehensible for many Cambodians. In most cases, it was understood as farming without chemical input.

The Cambodian Organic Agriculture Association (COrAA), the only current domestic organic certification body, was established through an international development

[1] Daily Sun: Bangladesh to export 5 metric tons tea produced from jute leaves this year, September 9, 2019. Available at https://www.daily-sun.com/post/422234/Bangladesh-to-export-5-*metric-tons-tea-produced-from-jute-leaves-this-year*

[2] The Business Strandard (March 12, 2020): Bangladesh leads global organic textile production. The TBSNews website. Available at https://tbsnews.net/economy/bangladesh-leads-global-organic-textile-production-55339

[3] Mirdha, Refayet Ullah (2019): Organic push earns global praise. In: The Daily Star, March 21, 2019 Available at https://www.thedailystar.net/business/organic-textile-manufacturing-earns-global-praise-1718191

initiative in 2006. The organisation still struggles to create a 'localised' and 'self-sustaining' certification model. In 2019, 34 operators in Cambodia were certified under the US NOP[1]. The year 2020 saw the expansion of exports of organic products through contract farming with smallholder farmers. Rice remained the main crop, with cassava and cashew nuts in the pilot stage.

The Cambodian Government introduced an organic agriculture policy in April 2020 to boost production and exports. This policy is expected to launch the rules and a unique logo to identify locally produced certified organic food.

China

The COVID-19 pandemic created big challenges for China's economy and created a significant change in its people's lifestyle in 2020. E-commerce, especially live-streaming, played an important role in stimulating the economy. COVID-19 raised the issue of healthy food consumption, and the organic sector became a hotspot for investment. As a result, in 2020, 89 certification bodies were established.

The central government has geared its efforts towards developing rural areas by promoting organic agriculture. According to the 'Two mountains' theory highlighted by the President Xi Jinping, the annual 'No 1 central government policy' and the 2020 'Agriculture and Rural Green Development Key Points' of the Ministry of Agriculture and Rural Affairs of the People's Republic of China, both emphasise enhancing certified organic management. On September 21st, 2020, the State Administration for Market Regulation launched the Organic Product Certification Promotion Week with the slogan 'Guard the Green Water and Mountain, Share the Green Life'. 2020 was the first time that one of the provincial governments - Jiangxi Province – stated that organic vegetable certification should be stimulated by their policy 'developing vegetable production in a high-quality way'.

China is seeking more international cooperation in the organic sector, based on the 'One Road and One Belt' national policy. Many organic products were shown in the 3rd China International Import Expo in Shanghai in 2020. The State Administration for Market Regulation launched a project to compare China's organic regulation and management system with the IFOAM Norms[2] and the U.S. National Organic Programme (NOP) standards.

India

The COVID-19 crisis darkened whatever dreams remained for Indian farmers. Even though the agriculture sector witnessed a 3.4 percent growth in GDP due to better than average rainfall in most parts of the country, the small-scale and peasant farmers were

[1] US NOP is the United States National Organic Programme. Information is available at https://www.ams.usda.gov/about-ams/programs-offices/national-organic-program

[2] IFOAM – Organic s International (2021 –Online): The IFOAM Norms form the basis of the Organic Guarantee System of IFOAM - Organics International. The IFOAM website., available at https://www.ifoam.bio/our-work/how/standards-certification/organic-guarantee-system/coros

not part of this growth story. They were unable to access organic markets due to the incessant lockdowns and subsequent limitations of movement.

Meanwhile, India has enacted three major ordinances[1] that will have an impact on agriculture:

- The Farmers' Produce Trade and Commerce (Promotion and Facilitation) Ordinance, 2020: Allowing liberal trade, increasing competition amongst buyers, removing barriers in interstate trade and offering more options to sell and buy.
- The Farmers' (Empowerment and Protection) Agreement on Price Assurance and Farm Services Ordinance, 2020: Facilitating visibility and assurance of price to farmers at the time of sowing, minimising market risks, solving issues of erratic food pricing and encouraging contract farming.
- The Essential Commodities (Amendment) Ordinance 2020: Boosting private investments in agriculture supply chains, food processing industries, and export infrastructure.

The specific impact of these ordinances on organic farming and organic markets is yet to be assessed.

The country has witnessed a surge in certification, even though there were challenges with inspections and appraisals during the lockdown. The number of Participatory Guarantee System (PGS) certified farmers under the government-administered PGS system has risen to almost one million farmers[2] in five years, while about 1.3 million farmers are certified under third party systems.

'Northeast India can become a huge hub of organic farming and the capital for organic products with its own identity in the world' Prime Minister Narendra Modi said in one of his recent inaugural addresses. With more than 75 percent of the area under forests in the Northeast region and most farmers practising organic farming by default, there is vast potential for including these farmers within the ambit of certified organic markets. The government policies and interventions are following in Sikkim's footsteps – the first organic state in the country.

Indonesia

In 2020, the National Medium-Term Development Plan IV (2020-2024) was launched to increase organic agriculture programs and policies throughout the country. The plan aims to increase organic agriculture through the '1000 organic villages' program, which is implemented through the Ministry of Agriculture, the Ministry of Villages, Development of Disadvantaged Regions and Transmigration and the Ministry of Trade.

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[1] Krishi, Atmanirbhar and Aatmanirbhar Bharat (2020): A Step towards Transformation of Agriculture into Sustainable Enterprises. The website of the Government of India mygov.in. Available at https://blog.mygov.in/atmanirbhar-krishi-aatmanirbhar-bharat/

[2] Department of Agriculture & Cooperation, Ministry of Agriculture and Farmers Welfare, Government of India (2020): Participatory Guarantee System for India. The PGS-India website. Available at https://pgsindia-ncof.gov.in/

There was an increase in organic products, mostly driven by demand for organic herbs, essential oils, ingredients for cosmetics, and organic coconuts. During the COVID-19 pandemic, domestic and international demand for organic products increased, particularly for organic spices and herbs.[1]

At the farm level, there are more and more initiatives to promote PGS. The Indonesia Organic Alliance initiated the foundation PAMOR (Indonesia PGS) in several places in Sumatra and Java. The number of communities or farmer groups under PGS is also increasing.

At the government level, more districts are promoting organic programs through the development of specialty products such as rice, coconuts, coffee, herbs and spices, which are certified organic according to national or international standards. There is also a growing interest among local government to be part of the Asian Local Governments for Organic Agriculture (ALGOA).[2] The central government, through the Ministry of Agriculture, the Ministry of Trade and the Ministry of Cooperatives and Small and Medium Enterprises (SMEs), are also more actively supporting farmer groups. For example, SMEs and companies have participated in regional and international trade fairs, such as Biofach.

Japan[3]

The Ministry of Agriculture, Forestry and Fisheries (MAFF) in Japan revised 'The Basic Plan for Agricultural Production and Management' in March 2020, which includes promoting organic agriculture. The Basic Plan acknowledges that organic agriculture contributes to biodiversity enhancement and climate change mitigation and complies with the Sustainable Development Goals (SDGs). The Basic Plan aims to triple the number of organic farmers and organic land in the country by 2030. It also seeks to increase the organic food market to 328 billion yen by 2030[4], from 185 billion yen in 2017[5].

Local governments have started responding to demands to support organic agriculture and sustainable food systems, especially during the COVID-19 pandemic. A concrete example is the establishment of the Local Organic SATO Association Chiba (LOSAC). This alliance of local governments, farmer groups, consumer groups, retailers and other businesses and institutions was established in February 2020. The LOSAC aims to build sustainable local and organic food systems, such as the procurement of organic school meals and micro-distribution system for local consumption.

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[1] Firman, AR and David W. (2020) Statistik Pertanian Organik Indonesia.Indonesia. Organic Alliance https://www.researchgate.net/publication/342945242_Statistik_Pertanian_Organik_Indonesia_2019

[2] A daughter organization of IFOAM Asia, which was set up in 2015 to promote cooperation among local governments promoting organic agriculture. Currently, there are more than 250 members in 16 countries in Asia.

[3] Sources: http://www.maff.go.jp/e/ - the website of the Japanese Ministry of Agriculture MAFF and http://www.env.go.jp/en/index.html - the website of the Japanese Ministry of the Environment.

[4] Approximatly 2.6 billion euros

[5] Approximatly 1.4 billion euros

Mongolia

The Mongolian Parliament approved the Law on Organic Food in April 2016. Its Action Plan for 2016-2020 sets a goal of 'creating a legal environment for organic food production and implementing financial, investment and tax policies to develop this sector'. To ensure the implementation of the Law on Organic Food, the Ministry of Food, Agriculture and Light Industry approved several regulations, including the 'Order No. A-09 and A-180' in 2018. With the approval of all the procedures, methodology and the list that accompanied the Law on Organic Food, the legal environment for organic food and agricultural production in Mongolia was successfully implemented.

The organic food registration and information database (www.organic.gov.mn) was launched in 2018 and was funded by the Food and Agriculture Organization (FAO) - Mongolia office. Currently, 16 participatory guarantee systems initiatives and one third-party certification body conduct organic food verification and certification in the country. Consumers can easily contact the manufacturer for information on certified, organic, and in-conversion organic products. In the database, 291 local organic and in-conversion products and 71 imported organic food products were registered as of 2020.

Pakistan

The Directorate of Organic Farming was established in 2008 with the aim to help small farmers. Innovative organic farming techniques were introduced, like bio-fertilisers, bio-herbicides and bio-pesticides. The program was a success, prompting the government to upgrade the Directorate of Organic Farming to the National Institute of Organic Agriculture.

The Government of Pakistan has also developed the Network of Organic Agriculture in Pakistan (NEOAP) to register organic farmers and traders. Private firms can register and be verified as organic farming entities. These organic farms have to be certified according to the EU regulation on organic farming (EC 834/2007) or the U.S. National Organic Program. Farmers sell produce to specified locations or may sell to certified firms. But the certification costs for farmers remain high.

In 2017, the State Government of Punjab proposed the "Punjab Organic Farming Act". Currently, it is still in draft form, but it covers all aspects of organic farming and establishes accreditation bodies within the province of Punjab's jurisdiction to standardise organic farming in the area.

Philippines

The Organic Act of 2010 outlines the development and promotion of organic agriculture in the Philippines and the establishment of comprehensive organic agriculture programs in the country. It also established the National Organic Agriculture Board (NOAB), which is responsible for the implementation of the policies and programs.

In 2020, the Philippines saw one of its most significant milestones with the amendment of the Organic Act of 2010, under which the resolution for the inclusion of PGS in the national organic standards was approved. Finally, smallholder farmers, which

comprise most of the country's farmers**,** will now have the chance to be certified organic through PGS.

The Province of Negros Occidental**,** with the assistance of the Negros Island Sustainable Agriculture and Rural Development Foundation, Inc. (NISARDFI)**, has** been a pioneer in promoting and driving the organic agricultural movement in the Negros Islands. They have expanded smallholder farmers' capacities to grow healthy crops and sustain their lives and livelihoods in harmony with the earth and its natural resources.

As of 2019, the cumulative land of all the organic farmers participating in the annual Negros Island Organic Farmers Festival was 20'000 hectares of land planted with different organic crops and more than 10'000 smallholders.

In 2019, 143 scholars graduated from the Agriculture, Forestry, and Agri Engineering track of the Central Philippine State University (CPSU) and the Fisheries track from the Carlos Hilado Memorial College. This results from a joint project between NISARD, the Philippine Reef and Rainforest Conservation Foundation, Inc (PRRCFI) and the Department of Agriculture (DA). As part of the continuing advocacy of NISARD to create a holistic and sustainable organic agriculture ecosystem, some of NISARD trustees along with other private individuals established a social enterprise, FamilyFarms Inc. and set up an organic certified rice mill in Bago City, Negros Occidental, to provide an opportunity for more than 250 organic rice farmers (42 percent women) from all over the island to mill their crops.

South Korea

In 2019, South Korea was affected by unprecedented climatic changes seriously affecting farm harvest, especially fruits, such as pears and oranges. Drastic government measures were set up to develop and implement policies to address climate emergencies and the raging COVID-19 pandemic. The policies aim to stabilise food supply and achieve zero carbon emissions by 2050. A Special Presidential Committee on Farming, Fishery, and Rural Affairs was established to prepare measures for the transformation into a decarbonised-ecological (organic) agriculture.

From 2019, the consumption of environmentally-friendly food[1] in the public sector increased as government support was expanded from school meals to the 'future generations' under the concept that safe and nutritious food should be served from the early stages of conception to birth. More than 88'000 pregnant women and new mothers received support packages which contained environmentally-friendly food. Furthermore, 5700 tons of environmentally-friendly rice were also provided to military bases nation-wide in 2020.

To increase public awareness, June 2nd (same phonetic sound as 'organic' in Korean) has been designated as 'Organic Day'[2]. Also, Fridays were designated as 'Save the Planet Day', and public cafeterias in government agencies have begun serving meals with at

[1] Pesticide-free and organic food.

[2] In 2019, more than 2´500 shops recorded sales of over 30 million US dollars during the celebrations. In 2020, environmentally-friendly food worth over 2 million US dollars was donated to lower-income families.

least one ingredient from environmentally-friendly production. The 'Eco-Friday Campaign' increased consumers' awareness of the benefits of environmentally-friendly agriculture for the common good.

In 2020, the onset of COVID-19 led to school closures and the cessation of school meals, seriously affecting the local farmers, and the 'Committee for Environmentally-Friendly Agriculture COVID-19 Countermeasure' was established to overcome the crisis. The central and local governments supplied 18'000 food packages and provided 6'861 people under self-quarantine with environmentally-friendly produce. Organic cooperatives and more than 11 large scale retail food outlets assisted in selling these products worth over 2.8 million U.S. dollars[1]. Furthermore, over 5.77 million households with school children received home deliveries of environmentally-friendly food packages. Finally, in August 2020, the certification system for processing was introduced to promote food processing in the organic sector. It uses pesticide-free produce, 70 percent of which is organic produce.

Sri Lanka

The country is considered a pioneer in the Asian region, introducing organic-certified tea and cinnamon to the world market. Currently, Sri Lanka has boosted Ceylon Organic Green Tea production. Sri Lankan coconut farmers have also turned their attention towards organic coconut plantations to meet the growing demand for organic coconut products worldwide. Sri Lankan organic products include tea, coconut-based products, spices such as pepper, cardamom, cloves, nutmeg, cinnamon and ginger, tubers and vegetables, coffee, cocoa, fruits such as pineapple, papaya, banana, lime and mango, juices, rice, cashew, processed products, and products such as kitul treacle, jaggery and bee products.

Today, organic farmers receive higher returns than their conventional counterparts. Consumers are ready to pay a premium of 30 percent for food products free of chemical and genetically modified material.

The Centre of Excellence for Organic Agriculture, which was involved in organic agriculture research, extension and development was merged with the Sustainable Agriculture Research and Development Centre, aiming to develop more technologies, high-quality organic fertiliser and other inputs, PGS and organic certification.

Organic villages were established and promoted, targeting female farmers, initiating village-level markets, and developing a few markets with large-scale market chains via PGS certification. The Sri Lanka Export Development Board and the Sri Lanka Standard Institute are two major institutes involved in promoting organic agriculture, providing export market facilities and training, as well as setting up quality standards for organic products, composts, and liquid fertilisers. Another initiative is the public-private

[1] Approximately 2.3 million euros.

partnership program to commence organic farming on 3'600 hectares in the unpolluted area of Moragahakanda-Kaluganga situated in the Mahaweli F[1] Zone.

Vietnam

Several policies were issued in the past several years that paved the way for the continuous development of organic agriculture in Vietnam, including the National Organic Standards TCVN 11041 in 2017, the Organic Decree 109 in 2018, the Circular 16 Guiding Decree in 2019, and most recently the National Organic Development Program for 2020-2030, which was signed in June 2020 by the national government.

Despite the development of policies to support organic, many challenges remain due to the lack of specific organic farming guidelines. Even though already acknowledged as an effective quality assurance system, PGS has not yet been officially recognised as a certification system.

Despite some challenges, 2019-2020 is considered a milestone in the history of organic agriculture development in Vietnam due to the series of policies, which have been launched and implemented, boosting the overall development of organic agriculture in the country.

IFOAM Asia in 2020

In 2020, IFOAM Asia concentrated on strengthening its internal structures and sectors and expanding the networking activities of the Asian Local Governments for Organic Agriculture (ALGOA).

The IFOAM Asia offices in China and the Philippines have been legally consolidated and are in full operation. The Asian Organic Youth Forum, an active sector under IFOAM Asia, carried out two very successful Forums in New Taipei City and Nagaland and took the initiative to expand its organic youth network globally by launching the Young Organics-Global Network[2] in September 2020.

The Asian Local Governments for Organic Agriculture ALGOA celebrated its 5th anniversary. The ALGOA events were held in two virtual live conferences attended by more than a thousand people from 46 countries. Three ALGOA Centers hosted by different local governments and partners were set up to facilitate its work – the ALGOA Center for Organic Leadership (Goesan County), the ALGOA Center for Public Procurement (New Taipei City) and the ALGOA Center for Organic Governance (LOAMCP-Ph[3]).

The 6th ALGOA Summit was a historic occasion as ALGOA took the initiative in linking with the International Network of eco-regions and other European partners, to launch the Global Alliance of Organic Districts (GAOD)[4] – a global alliance of organic districts

[1] The Mahaweli Development program is known as the largest multipurpose national development program in the history of Sri Lanka and is also considered as the keystone of the government's development program that was initiated in 1961

[2] www.yoglobalnetwork.com – the website of the the Young Organics-Global Network.

[3] League of Organic Municipalities, Cities and Provinces of the Philippines

[4] www.gaod.online – website of the Global Alliance of Organic Districts (GAOD)

from all continents. High-level speakers from the United Nation's Environment Programme (UNEP) and the United Nation's Food and Agriculture Organisation (FAO) also participated in the events.

Contributors

Bangladesh

› Dr. Md. Khurshid Alam, Principal Scientific Officer, Bangladesh Agricultural Research Institute (BARI), Bangladesh
› Dr Shaikh Tanveer Hossain, Ambassador IFOAM - Organics International, Former Vice-President, IFOAM Asia

Cambodia

› Ayuumi Matsuura, Director, IVY Cambodia

China

› Li Feng, Country Director, IFOAM Asia China Office

Japan

› Miyoshi Satoko, Vice President, IFOAM Asia, Ambassador Asian Local Governments for Organic Agriculture ALGOA

India

› Joy Daniel, Director, Lipok Social Foundation

Indonesia

› Dr. agr. Wahyudi David, Faculty Member, Food Science and Technology Program; Universitas Bakrie; Associate Editor at Journal Organic Agriculture, Editor in Chief at Asia Pacific Journal of Agriculture Food and Energy

Mongolia

› Tungalag Davaa, Senior officer, Department of Coordination for Food Production Policy Implementation, Ministry of Food Agriculture and Light Industry of Mongolia

Pakistan

› Dr Zuhair Hasnain, Assistant Professor, PMAS Arid Agriculture University

Philippines

› Edgardo Uychiat, President, Negros Island Sustainable Agriculture and Rural Development Foundation, Inc. (NISARD)
› Victoriano Ihong Tagupa, Executive Director, League of Organic Agriculture Municipalities, Cities and Provinces in the Philippines (LOAMCP-Ph)

South Korea

› Dong-Geun Choi, Executive Director, Korea Organic Checkoff Board, Namyangju City, Gyeonggi Province, Republic of Korea
› Manchul Jung, Director, Korea Institute for Local Governance and Rural Affairs, Chungnam Province, Republic of Korea

Sri Lanka

› Priyanga S. Dissanayake, Soil Scientist, Assistant Director of Agriculture Research, Sustainable Agriculture Research and Development Centre, Department of Agriculture, Sri Lanka,
› Dr. P.I. Yapa, Professor in Crop Science, Sabaragamuwa University of Sri Lanka, Belihuloya, Sri Lanka
› R.P.N. Gunaratne, Agriculture Instructor, Sustainable Agriculture Research and Development Centre, Department of Agriculture, Makandura, Sri Lanka

Vietnam

› Dang Thi Bich Huong, Deputy Chief, Vietnam Organic Agriculture Association

Asia: Current statistics

CLAUDIA MEIER,[1] BERNHARD SCHLATTER,[2] OLIVIA KELLER[3] AND JAN TRÁVNÍČEK[4]

Overview

In 2019, the area of organic agricultural land in Asia was more than 5.9 million hectares, representing 0.4 percent of the total agricultural area in the region. Eight percent of the global organic agricultural land was in Asia. Since 2001, the organic land in the region has grown over fourteen-fold. Between 2018 and 2019, however, there was a decrease in the organic area of 7 percent, mainly due to a decrease of temporary grassland in China (over 663'000 hectares). As in previous years, China and India were the countries with the largest organic agricultural area in Asia in 2019. In 2019, India for the first time surpassed China with a total organic agricultural area of 2.3 million hectares. China's organic agricultural area was 2.2 million hectares, over 919'000 million hectares less than in 2018, representing a loss of 29 percent. The country with the highest number of organic producers was India, with nearly 1.4 million producers. For more than ten years, the country with the highest organic share of total agricultural land has been Timor-Leste (8.5 percent in 2019).

Land use

In 2019, 49 percent of all organic farmland in Asia was used for arable crops (over 2.9 million hectares), 14 percent (over 795'000 hectares) for permanent crops and 1 percent for grassland/grazing areas (nearly 65´000 hectares). For 36 percent of the organic agricultural land, no land use information was available.

Since 2013, cereals have been the key organic arable crop group (mainly wheat, rice, and maize), with almost 1.3 million hectares in 2019, representing 0.4 percent of the total cereal area in Asia and 25 percent of the world's organic cereal area. In 2019, most organic cereals were grown in China (810'000 hectares), Thailand (over 169'000 hectares) and Kazakhstan (more than 146'000 hectares). The key organic cereals were rice, wheat, and maize. Organic rice represented 47 percent of the total organic cereal area and, together with wheat (25 percent) and grain maize (17 percent), represented 89 percent of the total organic cereal area in Asia. Organic rice was mainly grown in China (298'000 hectares), constituting 51 percent of the total organic rice in the region. The largest organic wheat areas were also in China (178'000 hectares), followed by Kazakhstan (over 133'000 hectares), together representing almost all of the total organic wheat area in Asia. Oilseeds (mainly soybeans) have also been an important arable crop group in Asia for many years, grown on over 640'000 hectares in 2019 (mainly in China

[1] Claudia Meier, 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] Olivia Keller, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[4] Jan Trávníček, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

and India), representing 1.1 percent of the total oilseed area in Asia and 38 percent of the world's organic oilseeds area. The key organic oilseeds were soybeans, with almost 436'000 hectares in 2019, representing 68 percent of the total organic oilseeds area. Organic soybeans were mainly grown in China (291'000 hectares) and India (130'000 hectares), together constituting 97 percent of the total organic soybeans in the region. Other important organic arable crop groups in Asia area were textile crops (almost 339'000 hectares, mainly cotton, mainly in India), green fodder (nearly 303'000 hectares, mainly in China), and medicinal and aromatic plants (over 128'000 hectares, mainly in China).

Most of the organic permanent cropland was used for coconuts (nearly 216'000 hectares, 2.2 percent of the total coconut area in the region and 72 percent of the world's organic coconut area), tea (nearly 128'000 hectares, 3.5 percent of the total tea area in the region and 70 percent of the world's organic tea area), temperate fruits (over 118'000 hectares, 1.5 percent of the total temperate fruits area in the region and 38 percent of the world's organic temperate fruits area), coffee (over 99'000 hectares, 3.7 percent of the total coffee area in the region and 14 percent of the world's organic coffee area), and tropical and subtropical fruits (nearly 70´000 hectares, 0.4 percent of the total tropical and subtropical fruit area in the region and 30 percent of the world's organic tropical and subtropical fruit area). The Philippines had the largest organic coconut area, with over 132'000 hectares, representing 61 percent of the total organic coconut area of the region. The country with the largest area used to grow organic tea was China. In 2019, China reported 106'000 hectares of organic tea, representing 83 percent of the total organic tea grown in Asia. The largest organic temperate fruit area was also in China, with 116'000 hectares, representing almost the total area of organic temperate fruits in Asia. Most of the organic coffee in Asia was grown in Indonesia, where over 60'000 hectares were reported, followed by Timor-Leste (over 32'000 hectares); both countries represented 93 percent of the organic coffee area in Asia. Most of the organic tropical and subtropical fruits in Asia were grown in China, where 34'000 hectares were reported, representing 49 percent of the organic tropical and subtropical fruit area in Asia.

Producers

In 2019, nearly 1.6 million organic producers were reported in Asia. India remained the country with the highest organic producers (almost 1.4 million), followed by Thailand (nearly 119'000). Unfortunately, many countries do not report the number of producers or only report the number of companies; thus, it can be assumed that the number of producers is higher. Since 2004, when there were 100'000 organic producers, the number has increased almost sixteen-fold.

Wild collection

In 2019, over 3.2 million hectares of organic wild collection were reported in Asia. Unfortunately, detailed data was 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) were the key commodities. Furthermore, bee pastures (over 56'000 hectares) played an

important role. China was the country in the region with the largest organic wild collection area, with over 1.5 million hectares, followed by India (nearly 1.4 million hectares), and Thailand (nearly 91′000 hectares).

Market

In Asia, organic market data is still not available for most of the countries, but it can be assumed 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 67). From the data available, we can assume that over 10.8 billion euros of organic products were sold in Asia. For China, over 8.5 billion euros were reported for 2019, and it is 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 (2018), and South Korea reported a market of 357 million euros. More information about the Asian market is available in the chapter about the global market from Amarjit Sahota (page 136).

For more information about the Asian figures, see data tables for Asia, page 211.

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Organic Agriculture in Asia: Graphs

Asia: The ten countries with the largest organic area 2019
Source: FiBL survey 2021

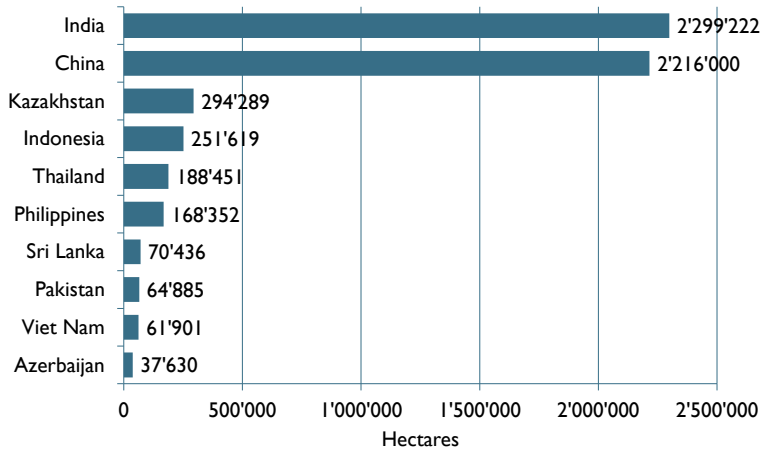


Figure 64: Asia: The ten countries with the largest organic agricultural area 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Asia: The countries with the highest organic share of total agricultural land 2019
Source: FiBL survey 2021

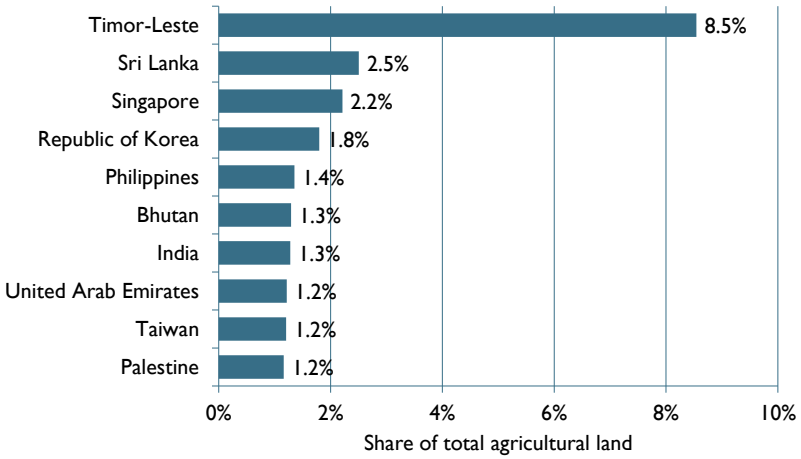


Figure 65: Asia: The countries with the highest organic share of total agricultural land 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Asia: Development of organic agricultural land 1999- 2019

Source: FiBL-IFOAM-SOEL-Surveys 2001-2021

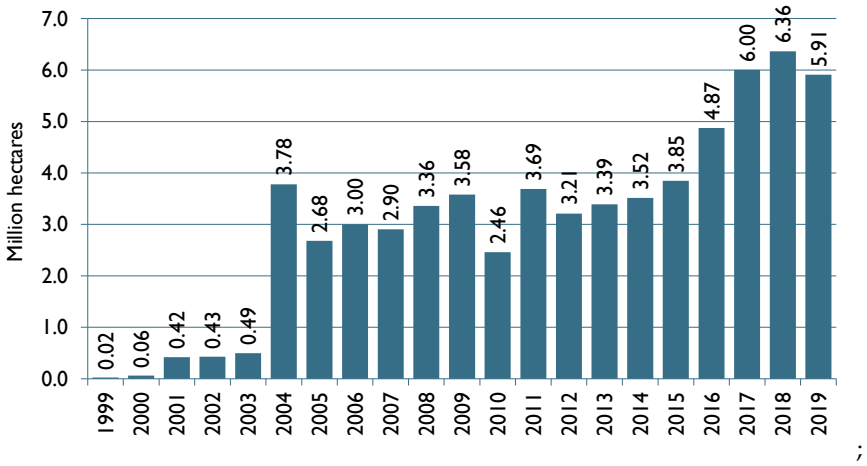


Figure 66: Asia: Development of organic agricultural land 1999 to 2019

Source: FiBL-IFOAM-SOEL surveys 2001-2021; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Asia: Use of organic agricultural land 2019

Source: FiBL survey 2021; based on information from the private sector, certifiers, and governments

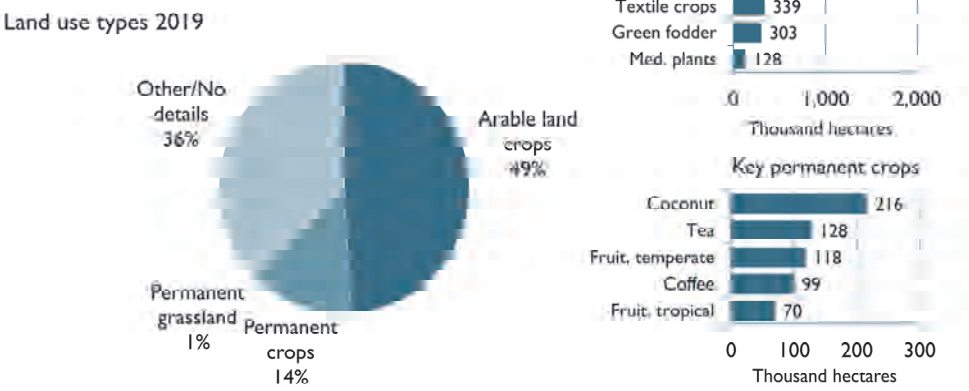


Figure 67: Asia: Use of organic agricultural land 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Organic Agriculture in Asia: Tables

Table 55: Asia: Organic agricultural land, organic share of farmland, producers 2019

Country	Area [ha]	Organic share [%]	Producers [no.]
Afghanistan	786	0.002%	1
Armenia	594	0.04%	29
Azerbaijan	37'630	0.8%	305
Bangladesh	2'249	0.02%	2
Bhutan	6'632	1.3%	4'354
Cambodia	25'757	0.5%	6'350
China	2'216'000	0.4%	6'308
Georgia	1'452	0.06%	1'075
India	2'299'222	1.3%	1'366'226
Indonesia	251'619	0.4%	18'162
Iran	11'916	0.03%	24
Iraq	63	0.001%	
Israel	6'307	1.0%	350
Japan	10'792	0.2%	3'678
Jordan	1'446	0.1%	23
Kazakhstan	294'289	0.1%	41
Kuwait	33	0.02%	1
Kyrgyzstan	19'054	0.2%	1'051
Lao P.D.R.	8'952	0.4%	2'165
Lebanon	1'574	0.2%	122
Malaysia	1'276	0.01%	31
Mongolia	61	0.0001%	112
Myanmar	12'948	0.1%	48
Nepal	9'361	0.2%	983
Oman	43	0.003%	5
Pakistan	64'885	0.2%	415
Palestine	5'388	1.2%	1'449
Philippines	168'352	1.4%	12'037
Republic of Korea	29'711	1.8%	18'199
Saudi Arabia	24'517	0.01%	244
Singapore	15	2.2%	
Sri Lanka	70'436	2.5%	2'338
Syrian Arab Republic	19'987	0.1%	2'458
Taiwan	9'536	1.2%	3'761
Tajikistan	10'340	0.2%	949
Thailand	188'451	0.9%	118'985
Timor-Leste	32'472	8.5%	4
United Arab Emirates	4'642	1.2%	102
Uzbekistan	932	0.004%	2
Viet Nam	61'901	0.5%	17'174
Total*	**5'911'622**	**0.4%**	**1'589'255**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317
**Total number includes data for countries with less than three operators.*

Table 56: Asia: All organic areas 2019

Country	Agri-culture [ha]	Aqua-culture [ha]	Forest [ha]	Wild collection [ha]	Other non agri. land [ha]	Total [ha]
Afghanistan	786					786
Armenia	594			8'570		9'164
Azerbaijan	37'630	123	123	1'063		38'939
Bangladesh	2'249	5'781				8'030
Bhutan	6'632			7'746		14'378
Cambodia	25'757					25'757
China	2'216'000			1'549'800		3'765'800
Georgia	1'452			215		1'667
India	2'299'222			1'370'579		3'669'801
Indonesia	251'619			18'412		270'031
Iran	11'916			50'219	20'000	102'135
Iraq	63					63
Israel	6'307			2		6'309
Japan	10'792					10'792
Jordan	1'446					1'446
Kazakhstan	294'289					294'289
Kuwait	33					33
Kyrgyzstan	19'054			13'479		32'533
Lao P.D.R.	8'952			17'068		26'020
Lebanon	1'574			259		1'833
Malaysia	1'276					1'276
Mongolia	61					61
Myanmar	12'948	20				12'968
Nepal	9'361			24'422		33'783
Oman	43					43
Pakistan	64'885			44'620		109'505
Palestine	5'388					5'388
Philippines	168'352					168'352
Republic of Korea	29'711					29'711
Saudi Arabia	24'517					24'517
Singapore	15					15
Sri Lanka	70'436					70'436
Syrian Arab Republic	19'987			8'000		27'987
Taiwan	9'536	2				9'538
Tajikistan	10'340					10'340
Thailand	188'451	269		90'716	5'156	284'592
Timor-Leste	32'472					32'472
United Arab Emirates	4'642					4'642
Uzbekistan	932			5'000		5'932
Viet Nam	61'901	100'000		12'450		174'351
Total	**5'911'622**	**106'195**	**123**	**3'222'620**	**25'156**	**9'285'716**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Table 57: Asia: Land use in organic agriculture 2019

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		**2'078'387**
Arable land crops	Cereals	1'253'310
	Dry pulses	83'896
	Fallow land, crop rotation	30'397
	Flowers and ornamental plants	12'400
	Fresh vegetables and melons	66'833
	Medicinal and aromatic plants	128'274
	Mushrooms and truffles	45
	Oilseeds	640'235
	Green fodder	302'529
	Root crops	1'988
	Seeds and seedlings	68
	Strawberries	33
	Sugarcane	8'557
	Textile crops	338'802
	Tobacco	4
	Arable crops, no details	5'158
	Arable crops, other	33'825
Arable land crops total		**2'906'354**
Cropland, no details		**60'877**
Other agricultural land		**5'809**
Permanent crops	Berries	121
	Citrus fruit	12'787
	Cocoa	423
	Coconut	215'917
	Coffee	99'478
	Flowers and ornamental plants, permanent	20
	Fruit	15'852
	Fruit, temperate	118'124
	Fruit, tropical and subtropical	69'957
	Fruit/nuts/berries	3'999
	Grapes	17'141
	Medicinal and aromatic plants, permanent	31'349
	Nuts	61'101
	Olives	6'512
	Tea/mate, etc.	127'554
	Permanent crops, other	15'047
Permanent crops total		**795'381**
Permanent grassland		**64'815**
Total		**5'911'622**

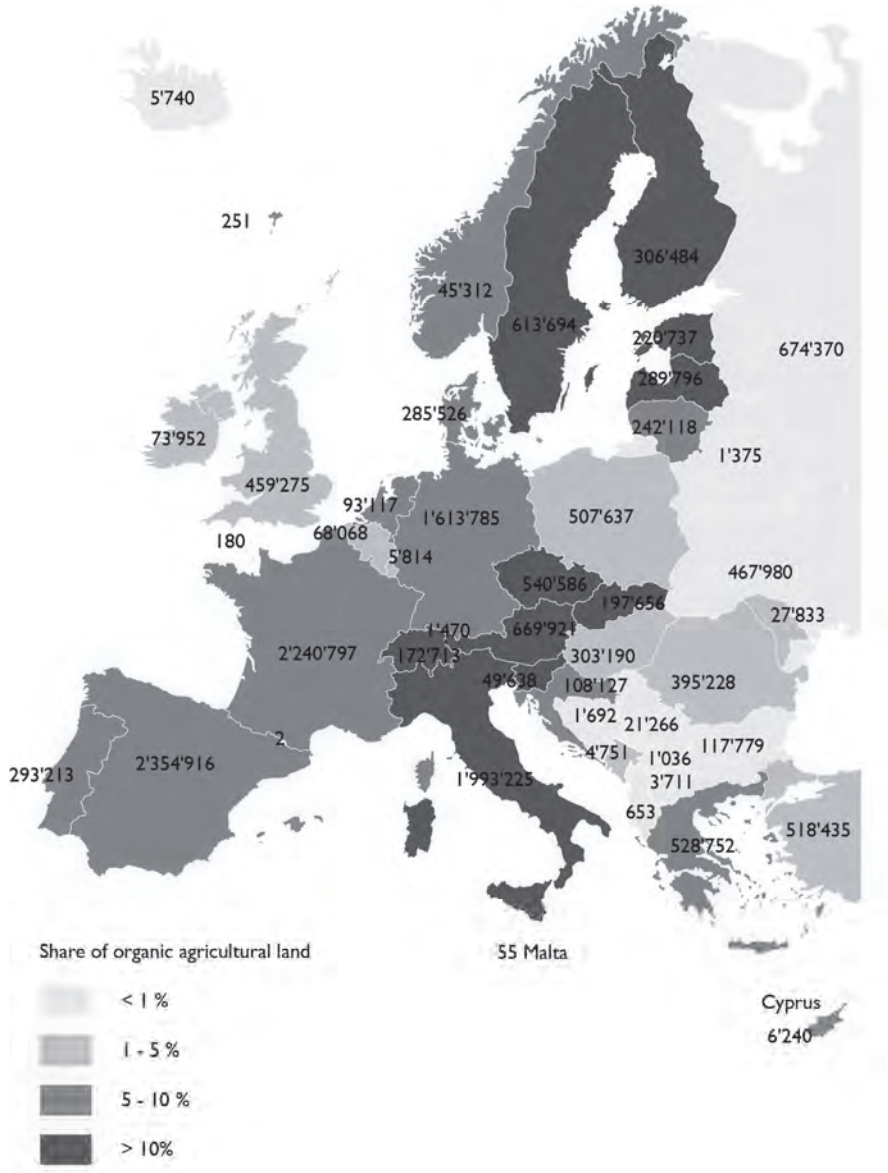
Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Table 58: Asia: Use of wild collection areas 2019

Land use	Area [ha]
Apiculture	56'267
Berries, wild	163
Fruit, wild	3'750
Medicinal and aromatic plants, wild	56
Nuts, wild collection	55'329
Oil plants, wild	303
Palm sugar	916
Seaweed	136
Wild collection, no details	3'105'700
Total	**3'222'620**

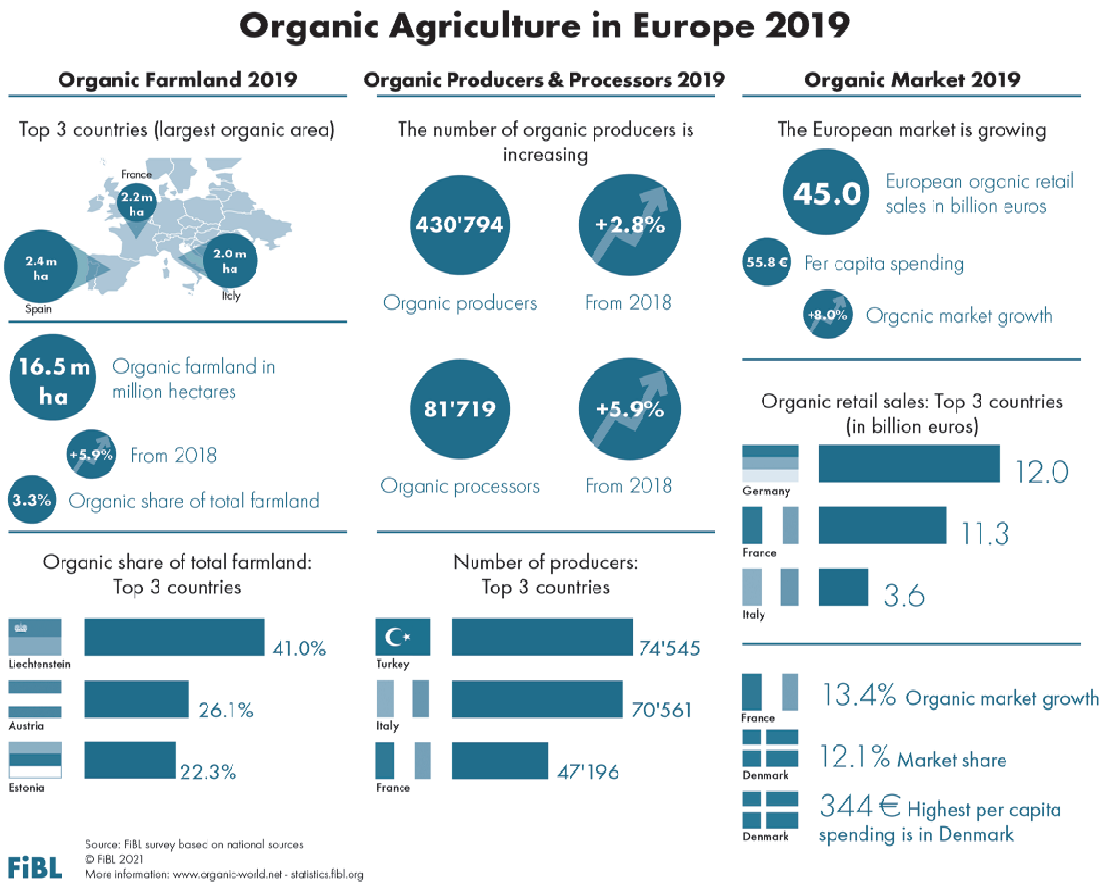
Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Europe



Map 4: Organic agricultural land in the countries of Europe 2019 (in hectares)

Source: FiBL-AMI survey 2021; based on information from the private sector, certifiers, governments, Eurostat and the Mediterranean Organic Agriculture Network. For detailed information on sources, please check annex.



Infographic 5: Organic agriculture in Europe: Key indicators 2019

Source: FiBL-AMI survey 2021

Organic in Europe: Recent Developments

Helga Willer,[1] Bram Moeskops,[2] Emanuele Busacca,[3] Léna Brisset,[4] Maria Gernert[5] and Silvia Schmidt[6]

The year 2020 with the COVID-19 crisis was a special year for the organic sector. While the consolidated data for 2019 show a continued growth trend for both organic production and market, in 2020 the market grew considerably faster than in the previous years as consumers turned to health and wellness products and paid more attention to disease prevention.

For the UK, for instance, where annual growth rates had been at around 5 percent in recent years, growth was far higher in 2020. Should this trend continue through the post-pandemic times, it is bound to impact organic farmland growth, making it more likely that the European Commission's aim of achieving an organic area share of 25 percent by 2030 will be reached. Apart from strong consumer interest, political support measures including a good regulatory framework, adequate support under the CAP, action plans and support for research and knowledge building will be crucial to achieving this goal.

The latest data for Europe show that organic farmland has reached about 16.5 million hectares (EU: 14.6 million hectares) or a share of around 3.3 percent (EU: 8.1 percent). The European Union's organic farmland share is far higher than in most countries and regions of the world; globally, about 1.5 percent of the farmland is organic (72.3 million hectares in 2019).

The European Commission aims to reach 25 percent organic area share by 2030. Austria already reached this benchmark in 2019 (more than 26.1 percent of the farmland was organic) and two other Member States are very close to it: Estonia (22.3 percent) and Sweden (20.4 percent).

[1] Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[2] Dr. Bram Moeskops, Research and Innovation Manager, IFOAM Organics Europe, Brussels, Belgium, www.organicseurope.bio
[3] Emanuele Busacca, IFOAM Organics Europe, Brussels, Belgium, www.organicseurope.bio
[4] Léna Brisset, IFOAM Organics Europe, Brussels, Belgium, www.organicseurope.bio
[5] Maria Gernert, TP Organics Coordinator, IFOAM Organics Europe, Brussels, Belgium, www.organicseurope.bio
[6] Silvia Schmidt, IFOAM Organics Europe, Brussels, Belgium, www.organicseurope.bio

EU: Growth of organic area and retails sales 2000-2019
Source: FiBL-AMI surveys 2009-2021

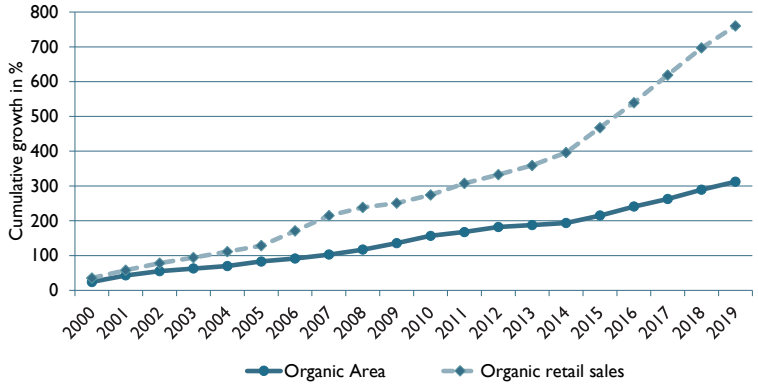


Figure 68: European Union: Growth of organic farmland and retail sales 2000-2019 compared

Source: FiBL-AMI surveys

In 2019, the organic market again grew faster than the organic area (Figure 68). Data shows that the EU organic food market increased to more than 41 billion euros or by 8 percent, whereas the farmland grew by 6 percent. While it is good to see strong market growth, the organic farmland area needs to continue to grow strongly as well to reach the 25 percent organic area share goal as set out by the European Commission (2020) in its Farm to Fork strategy.

New EU organic rules to be applied in 2022

In June 2018, the new European Union (EU) Regulation 2018/848[1] on production and labelling of organic products was published. The new EU organic regulation was initially set to apply from 01 January 2021. However, due to many reasons, including the COVID-19 pandemic, its application was postponed by one year to 01 January 2022[2]. The text that has been adopted in 2018 represents the "Basic Act". This means that many details of the text are being developed and adopted in the form of delegated and implementing acts. The development of secondary legislation started in June 2018 and should be concluded at the latest by June 2021, six months before the actual application of the new organic regulation. The final set of regulations will be composed of the Basic Act integrated by 15-18 delegated and implementing acts.

[1] Regulation (EU) 2018/848
[2] Regulation (EU) 2020/1693

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 2021 to 2027. As negotiations between the three European institutions got delayed, the new CAP will only enter into force in 2023, preceded by a two-year transition period.

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 raised, allowing more farmers to make the necessary additional efforts and investments. With the right incentives in both pillars, 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 environmental 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 to favour farming systems that contribute to multiple objectives, including organic farming. Moreover, a minimum of 30 percent of the first pillar should be dedicated to newly proposed eco-schemes.

Finally, the CAP's increased flexibility must be counterbalanced with strong common safeguards and a shared level of ambition. The organic movement defended ring-fencing of at least 70 percent of the entire CAP budget across both pillars, to ensure a level playing field and to avoid a race to the bottom for the climate and environment.

With the Green Deal (European Commission 2019c) and the publication of the Farm to Fork (European Commission 2020a) and Biodiversity strategies (European Commission 2020b) in May 2020, the Commission has put forward clear objectives for transitioning to sustainable food systems by 2030. But since the CAP will play a critical role in providing the means to reach these objectives, it is essential that the CAP – and its implementation at the national level through the National Strategic Plans – explicitly and fully contributes to the Green Deal's implementation and related strategies, which include the 'Farm to Fork strategy' and the ten priorities for the new EU Organic Action Plan to reach 25% organic land in Europe by 2030 (see subsequent chapter).

The European Green Deal & the Farm to Fork strategy: shaping a more sustainable EU agenda

The European Green Deal: A vision to climate neutrality for the EU by 2050

The European Green Deal (EGD, European Commission 2019c) is a new growth strategy unveiled by the European Commission in December 2019. The European Green Deal, one of the priorities of the Von der Leyen Commission (2019-2024), aims for Europe to be the first climate-neutral continent by becoming a modern, resource-efficient economy. Specifically, the EGD aims "to transform the EU into a fair and prosperous society, with a modern, resource-efficient and competitive economy where there are no net emissions of greenhouse gases in 2050 and where economic growth is decoupled from resource use". Moreover, the EGD stresses that "the EU has the collective ability to transform its economy and society to put it on a more sustainable path".

The EGD covers several sectors in which the EU can do better in terms of sustainability, including the energy, the transport and the agri-food sector. For this publication, the focus is on the latter sector. The Farm to Fork (F2F) and the EU biodiversity strategies, both a part of the EGD, unveiled in May 2020, aim at achieving the EGD goals for the agri-food sector. The EU biodiversity strategy aims at "bringing nature back into our lives" with many initiatives including the proposal of EU nature restoration targets, the review and possible revision of the Environmental Crime Directive and building an EU Business for Biodiversity movement.

Some initiatives within the Farm to Fork and the EU biodiversity strategies overlap, e.g., the initiatives aim to boost organic and more sustainable practices. As the Farm to Fork strategy includes those initiatives and ambitions relevant to the whole (organic) food supply chain, this chapter will focus on this strategy.

Overview of the Farm to Fork (F2F) strategy

The F2F strategy, at the heart of the European Green Deal, "addresses comprehensively the challenges of sustainable food systems and recognises the inextricable links between healthy people, healthy societies and a healthy planet".

The F2F strategy is composed of a main communication and an annex, the latter serving as an action plan for the strategy. The strategy recognises that food systems are responsible for approximately 29 percent of the world's greenhouse gas (GHG) emissions and that nearly 70 percent of all agricultural GHG emissions come from the animal sector. It explicitly states that "there is an urgent need to reduce dependency on pesticides and antimicrobials, reduce the use of fertilisers, increase organic farming, improve animal welfare, and reverse biodiversity loss". The F2F is meant to lead a global transition towards competitive sustainability from farm to fork.

The goals of the F2F strategy are to:

- Ensure that food production, transport, distribution, marketing, and consumption have a neutral or positive environmental impact,
- Preserve and restore the land and sea-based resources,
- Mitigate climate change,

– Reverse the loss of biodiversity,
– Ensure food security, nutrition, and public health.

Notably, the F2F strategy is not legally binding, which means that adequate policies must support initiatives and targets contained therein. In the following section is an overview of how this would work for initiatives that directly impact organic. For the sake of succinctness, only those initiatives that directly impact organic are considered in this publication. Still, many more initiatives are included in the F2F strategy than only the ones hereafter.

Farm to Fork strategy & organic

Organic farming has a prominent place in the Farm to Fork strategy. Perhaps the most significant achievement for the organic sector is the recognition that organic can be part of the solution in addressing the environmental challenges we currently face, as the F2F strategy includes a target which aims at achieving **at least 25 percent of the EU's agricultural land under organic farming by 2030** and a significant increase in organic aquaculture. This 25 percent target will not be reached with a business as usual approach, or with only a few favourable policies here and there. To reach the 25 percent target, comprehensive policy support for organic is needed across the EU, aiming to increase the supply and demand for organic products.

As part of the F2F strategy, the Commission pledged to review the EU promotion programme for agricultural and food products to enhance its contribution to **sustainable production and consumption**. At the end of 2020, the Commission pledged a total of 182.9 million euros to promote European agri-food products, for example via campaigns in the internal market or third countries, with a focus on sustainable agriculture. The budget for campaigns about organic farming, EU sustainable agriculture, and the agri-food sector's role in terms of climate action and the environment accounts for about half of the total budget, i.e. 86 million euros.

Other F2F strategy initiatives that directly impact organic and that are yet to be carried out at the time of writing these lines are:

– The Commission will put forward an **Action Plan on organic farming**, expected at the beginning of 2021. In this context, push and pull measures that boost both organic production and demand are crucial.
– Determine the best modalities for setting minimum mandatory **criteria for sustainable food procurement** to promote healthy and sustainable diets, including organic products, in schools and public institutions (indicative timetable: Q3 2021).
– The Commission will take measures to facilitate the **registration of seed varieties,** including for organic farming, and to ensure easier market access for traditional and locally adapted varieties.

Research

Organic farming research is funded under national research programs or national organic action plans and European programmes. Since the mid-1990s, several organic farming research projects have been financed by the EU framework programmes. So

far, the following projects focussing on organic agriculture have been funded by the current framework programme Horizon 2020:[1] OK-Net Arable, OK-Net EcoFeed, LIVESEED, ECOBREED, BRESOV (three projects on organic seed and plant breeding). RELACS and Organic-PLUS, which investigate alternatives for contentious inputs used in organic farming, started in spring 2018. In 2019, PPilow started as a new project addressing animal welfare in organic farming and a thematic network on organic fruit production, BioFruitNet.

In 2020, the CORE Organic network, which joins forces of the EU Member States to fund transnational research projects, released its 15-year activity report (2004-2019) (CORE Organic 2021), after celebrating its 15th anniversary in 2019. The current CORE Organic Cofund consortium[2] consists of 27 partners from 19 countries. In 2016, 12 projects were selected to run until 2021, distributed across four thematic areas: Plant production systems, animal feed, livestock systems, and organic food processing[3]. The report shows that CORE Organic has primarily achieved its mission to enhance the European research area on organic agriculture: The number of projects funded on topics identified as common priorities while ensuring the participation of SMEs and facilitating the integration of new forms of knowledge generation, innovation and dissemination has allowed the sector to better meet the demand for organic food and products and to develop practices per the organic principles and regulations. Collaboration with the European Technology Platform TP Organics and other relevant sector players has helped ensure that the voice of transnational organisations representing farmers, industry and civil society have been taken into account. With the Organic Eprints open access repository, a shared knowledge reservoir for effective dissemination of research outcomes has been created. The CORE Organic projects' outcomes are archived in Organic Eprints, which today has more than 24'000 entries (Willer/Rasmussen 2019).

Organic Farm Knowledge for farmers and advisers to exchange knowledge

In December 2018, the Horizon 2020-funded project OK-Net Ecofeed launched the extended knowledge platform Organic Farm Knowledge (https://organic-farmknowledge.org/), initially 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 14 languages. In 2019, the platform started to be expanded to cover tools and solutions related to organic feed for pigs and poultry and seed, breeding, and many other topics. In 2020, a concept note was developed as an overarching framework for further developing Organic Farm Knowledge, including an Action Plan outlining the main tasks, which is now being

[1] https://ok-net-ecofeed.eu; www.liveseed.eu; http://ecobreed.eu; https://bresov.eu; https://relacs-project.eu; https://organic-plus.net; www.ppilow.eu; https://biofruitnet.eu/

[2] 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.

[3] http://projects.au.dk/coreorganiccofund

implemented by the newly established Executive and Editorial Boards composed of 14 partners from across Europe. The goal is for the platform to become the European reference hub for practical knowledge on organic farming.

Science Day 2020 at Biofach

On 14 February, TP Organics' Science Day[1] took place at Biofach 2020 in Nuremberg, Germany on innovation opportunities for organic companies in the new research programme of the EU, Horizon Europe. TP Organics[2] is the European Technology Platform for Organic Food and Farming. Science Day was dedicated to the urgent need to address food and packaging waste, particularly plastic waste, to increase the sustainability of the (organic) food sector. The European Commission highlighted that support for organic and agroecology is seen as an important element to future-proof food and farming systems. Within the European Green Deal, the European Commission aims to address EU food systems' challenges along the whole value chain – from farm to fork. Improving packaging, reducing food loss and waste, and empowering consumers are on the agenda, among others. At least 35% of the funding under Horizon Europe will be dedicated to climate solutions, and €10 billion are expected to be available for Cluster 6, 'Food, bioeconomy, natural resources, agriculture and environment'.

TP Organics' new Strategic Research & Innovation Agenda for Organics & Agroecology (TP Organics 2019a) was presented, which identifies 29 research needs in four priority areas: (1) Moving organic further; (2) Redesigning food and agricultural policies; (3) Climate-resilient and diversified farming systems; and (4) Sustainable value chains for better food systems. The importance of meeting consumer demand for minimal processing and supporting innovations to reduce food and packaging waste was highlighted. The companies Bio4Pack and FUTAMURA presented their solutions for sustainable packaging. Closing the loop to a circular economy, bioplastics based on cellulose or organic waste are suitable for composting or recycling. The organic biscuit company SOMMER gave insights into its experience with bioplastic. While bioplastics display good barrier properties and do not reduce the products' shelf life, costs for materials and waste disposal are higher. For widespread use of bioplastic, consumers need to be educated on the right disposal; public waste management needs to adapt to the new material, and the real costs of fossil fuel-based packaging should be reflected in its price.

Organic Innovation Days

The first-ever online edition of the Organic Innovation Days[3], TP Organics' annual event that brings together the organic sector and policymakers at an EU level, took place on 24-25 November 2020, in cooperation with the EU H2020 project LIVESEED, which is coordinated by IFOAM Organics Europe. Through interactive functionalities, the

[1] www.tporganics.eu/science-day-2020
[2] www.tporganics.eu
[3] www.tporganics.eu/organic-innovation-days

Organic Innovation Days once again provided a unique opportunity 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.

While LIVESEED held its final conference for stakeholders and policymakers and a European workshop presenting key project outcomes, innovations and results, TP Organics sessions focused on how the new EU research programme Horizon Europe can support the transformation towards sustainable food and farming systems by leveraging the potential of organic and agroecology. The European Commission showed that organic and agroecology already play a key role in many different European policies, including the Farm to Fork strategy. Horizon Europe will be a vital enabler of the European Green Deal. Still, instruments beyond research and innovation are needed to support the uptake of organic in a more holistic approach.

Horizon Europe

Horizon Europe, the EU's 9th Framework Programme for research and innovation, will provide a proposed budget of €100 billion for the period 2021-2027. The briefing published by TP Organics in 2019 (TP Organics 2019b) provides an overview of the programme, its structure and content, the policy process, and TP Organics position. The European Parliament and the EU Council 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 work programmes' content and calls for proposals for the first four years of Horizon Europe. The first work programme is expected by April 2021. €10 billion are to be allocated to Cluster 6, '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, and the latest version of the draft Work Programme (from 21 December 2020) includes three calls that specifically address organic research needs: 'Fostering research in organic crop breeding', 'Innovative solutions to prevent adulteration of food-bearing quality labels: focus on organic food and geographical indication' and 'Reaching the Farm to Fork target: R&I scenarios for boosting organic farming and aquaculture in the EU'. In addition, 18 calls mention 'organic'.

TP Organics welcomes the planned Mission for Soil health and food as well as the partnership for 'Accelerating farming systems transition: agroecology living labs and research infrastructures', which will be crucial instruments 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.

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 2021 initially planned for 2020, the 20th OWC will be held in Europe for the first time since 2008, and it will take place from 6 to 10 September in Rennes, France. Drawing from the motto, "From its Roots, Organic Inspires Life", OWC 2021 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.

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[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/

Europe and the European Union: Key indicators 2019

Indicator	Europe	European Union	Top 3 countries Europe
Organic farmland	16.5 million ha	14.6 million ha	Spain (2.4 million ha) France (2.2 million ha) Italy (2.0 million ha)
Organic share of total farmland	3.3 %	8.1 %	Liechtenstein (41.0%) Austria (26.1%) Estonia (22.3%)
Increase in organic farmland 2018-2019	0.92 million ha	0.82 million ha	France (+205'775 ha) Ukraine (+158'880 ha) Spain (+108'441 ha)
Relative increase in organic farmland 2018-2019	5.9%	5.9%	Kosovo: (+548 %) Bosnia and Herzegovina: (+89 %) Moldova: (+62 %)
Land use	Arable crops: 7.8 million ha Permanent crops: 1.8 million ha Permanent grassland: 6.5 million ha	Arable crops: 6.6 million ha Permanent crops 1.6 million ha Permanent grassland: 6.4 million ha	
Top arable crop groups	Green fodder: 2.6 million ha Cereals: 3.0 million ha Dry pulses: 0.7 million ha	Green fodder: 2.5 million ha Cereals: 2.4 million ha Dry pulses: 0.5 million ha	Largest arable areas: France (1.3 million ha) Italy (1.0 million ha) Germany (0.7 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: 0.4 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	10.5 million ha	7.1 million ha	Finland (4.6 million ha) Romania (1.8 million ha; 2014) Belarus (1.5 million ha)
Producers	430'794	343'858	Turkey: (74'545) Italy (70'561) France (47'196)
Processors	81'719	78'240	Italy (21'940) France (19'311) Germany (16'162)
Importers	6'508	5'747	Germany (1'831) France (662) Switzerland (548)
Retail sales	45.0 billion euros	41.4 billion euros	Germany (11'970 million euros) France (11'295 million euros) Italy (3'625 million euros)
Growth of retail sales 2018-2019	8.0%	8.0%	France (13.4%) Estonia (13.2%) Belgium (11.7%)
Organic share of total market	No data	No data	Denmark (12.1 %) Switzerland (10.4 %) Austria (9.3 %)
Per capita consumption	56 euros	84 euros	Denmark (344 euros); Switzerland (338 euros) Luxembourg (265 euros)

Source: FiBL-AMI survey 2021.
For detailed data sources, see annex

Organic Farming and Market Development in Europe and the European Union

JAN TRÁVNÍČEK,[1] HELGA WILLER[2] AND DIANA SCHAACK[3]

In 2019, the development of the organic sector in the European Union was characterised by continued growth in all key indicators. In 2019, the organic market grew more than the organic area, thus continuing the trend of the past several years. Only in 2018 did the organic farmland grow at a faster rate than the market. While it is good to see strong market growth, the organic farmland area needs to continue to grow, as growth will be needed to reach the 25 percent organic area share goal set out by the European Commission (2020) in its Farm to Fork strategy.

1 Key facts and figures: Production and market highlights

More than 16.5 million hectares of farmland were organic in Europe in 2019 – Spain had the largest area

In Europe, 16.5 million hectares were managed organically in 2019 (European Union: 14.6 million hectares). With almost 2.4 million hectares, Spain continued to be the country with the largest organic area in Europe (more than 14 percent of the European organic farmland), followed by France (2.2 million hectares), and Italy (2.0 million hectares).

European organic farmland increased by almost one million hectares

The organic land increased by more than 0.9 million hectares in Europe (with a major increase in farmland in the France and Ukraine) and by more than 0.8 million hectares in the European Union, representing an increase of 5.9 percent in Europe and in the European Union. Growth was a bit lower than in 2018 but higher than in the first years of the current decade. From 2010 to 2019, 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 3.3 percent of the total agricultural land and 8.1 percent in the European Union. In Europe (and globally), Liechtenstein has the highest organic share of all farmland (41.0 percent) followed by Austria, the country in the European Union with the highest organic share of agricultural land (26.1 percent).

Organic producers, processors and importers on the rise

There were almost 430'000 organic producers in Europe (European Union: more than 343'000), with the largest numbers in Turkey (74'545) and Italy (70'561). While in 2019 the number of producers grew by 2.8 percent in Europe (5.0 percent in the European

[1] Jan Trávníček, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[2] Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[3] Diana Schaack, Agrarmarkt Informations-Gesellschaft mbH, Bonn, Germany, www.ami-informiert.de

Union), growth was 58 percent in Europe and 56 percent in the European Union from 2010-2019.

There were more than 81'719 organic processors in Europe (+8.5 percent compared to 2018) and almost 78'240 in the European Union (+9.1 percent). The country with the largest number of processors was Italy (21'940).

The number of importers grew faster than the number of producers and processors: More than 6'500 importers (+12.1 percent) were counted in Europe and more than 5'747 in the European Union (+13.9 percent). Germany had the most importers (1'831).

Retail sales reached the 45 billion euro mark - Market continues to grow

Organic retail sales in Europe were valued at 45.0 billion euros (41.4 billion euros in the European Union). The European Union represents the second largest single market for organic products after the United States. With 11.97 billion euros of retail sales, Germany is the biggest market in Europe and the world's second-largest.

The European organic market recorded a growth rate of 8.0 percent (European Union: 8.0 percent). The highest growth was observed in France (13.4 percent). In the decade 2010-2019, the European and European Union organic market values more than doubled.

Organic imports – China is the largest supplier

Data on organic imports to the European Union in 2019 show that a total of 3.2 million metric tons of organic products were imported to the European Union. The largest supplier was China; the key product group was tropical fruit. The largest importer was The Netherlands.

European consumers spend more on organic food

European consumers spent 56 euros on organic food per person in 2019 (European Union: 84 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 (344 and 338 euros, respectively).

Highest organic market shares are in Europe

Globally, EU countries account for the highest organic food sales shares as percentages of their respective food markets. Denmark had the highest organic market share globally (12.1 percent) and was the first to pass the 10 percent mark. Austria with 9.3 percent, is expected to reach the 10 percent mark soon.

2. Organic agricultural land: Area, organic shares, growth

Table 59: Europe: Organic agricultural land in Europe and the European Union 2019

	Organic area [million ha]	Organic share [%]	Change 2018-2019 [%]	Change 2018-2019 [million ha]	Change 2010-2019 [%]	Change 2010-2019 [million ha]
European Union	14.6	8.1%	5.9%	0.8	61%	5.5
Europe	16.5	3.3%	5.9%	0.9	65%	6.5

Source: FiBL-AMI survey based on Eurostat and national data sources. For country details, see Table 66.

2.1 Organic agricultural land

In 2019, 16.5 million hectares were farmed organically in Europe and almost 14.6 million hectares in the European Union (Table 59). Almost 90 percent of Europe's organic farmland was in the European Union. The countries with the largest organic land areas 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 69). 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.

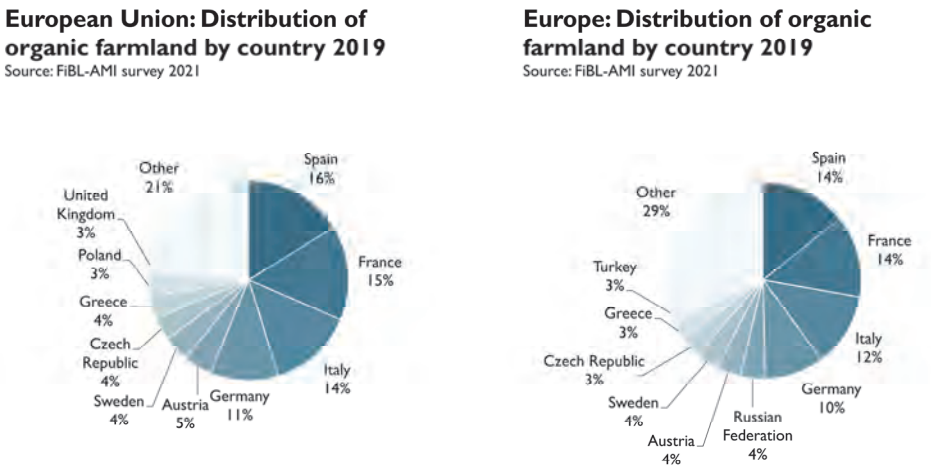


Figure 69: Europe: Distribution of organic farmland by country 2019

Source: FiBL-AMI survey 2021 based on national data sources and Eurostat
For detailed data sources, see annex

Europe: Organic agricultural land by country 2019

Source: FiBL-AMI survey 2021

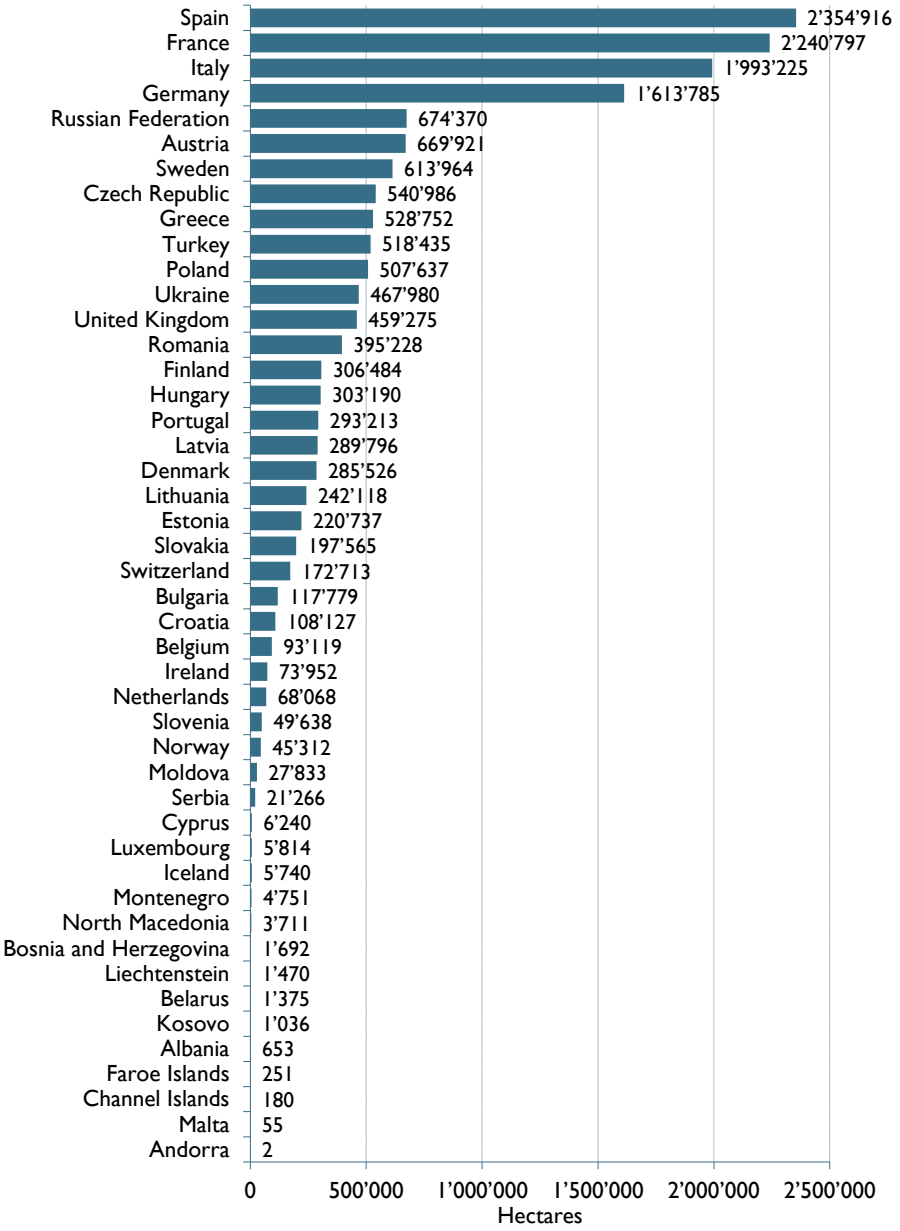


Figure 70: Europe: Organic agricultural land by country 2019

Source: FiBL-AMI survey 2021 based on Eurostat national data sources.
For detailed data sources see annex.

2.2 Organic shares of total agricultural land

In Europe, 3.3 percent of the agricultural land is organic, and in the European Union, 8.1 percent (Table 59). In twelve countries (European Union: ten), 10 percent or more agricultural land is managed organically (Figure 71). The countries with the highest organic shares are Liechtenstein (41.0 percent), Austria (26.1 percent), Estonia (22.3 percent), and Sweden (20.4 percent). Liechtenstein is the country with the highest organic farmland share in the world.

2.3 Growth of organic agricultural land

In 2019, the organic agricultural land in Europe increased by 0.92 million hectares (EU: 0.82 million hectares) or 5.9 percent (EU: 5.9 percent). In Europe, the absolute growth was higher than in the European Union, due to a major increase in organic farmland in Ukraine (+158'880 hectares).

The countries that contributed the most to the growth were France, Ukraine, Spain, Hungary, Germany, and Portugal, contributing almost 740'000 additional hectares (Figure 74). The highest relative increases were in Kosovo (+548 percent), Bosnia and Herzegovina (+88 percent), Moldova (+62 percent) and Ukraine (+51 percent). However, some countries showed a decrease in organic land, such as Turkey, Ireland, Iceland, and Bulgaria (Table 66).

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, such as Austria, Germany and Switzerland (Table 67).

In Europe, of the 16.5 million hectares of organic agricultural land, 11.1 million hectares were fully converted[1] (10.0 million out of 14.6 million hectares in the European Union). At least 2.6 million hectares were under conversion (2.3 million in the European Union). The conversion area suggests that, in the near future, an increase in the supply of organic products can be expected (Figure 75).

By country, the largest in-conversion areas are in Western and Southern European countries, notably France (565'571 hectares), Italy (383'127 hectares), Spain (346'622 hectares), and Romania (183'741 hectares) (Table 67).

[1] Excluding Austria, Germany and Switzerland

Europe: Organic share of total agricultural land by country and country group 2019

Source: FiBL-AMI survey 2021

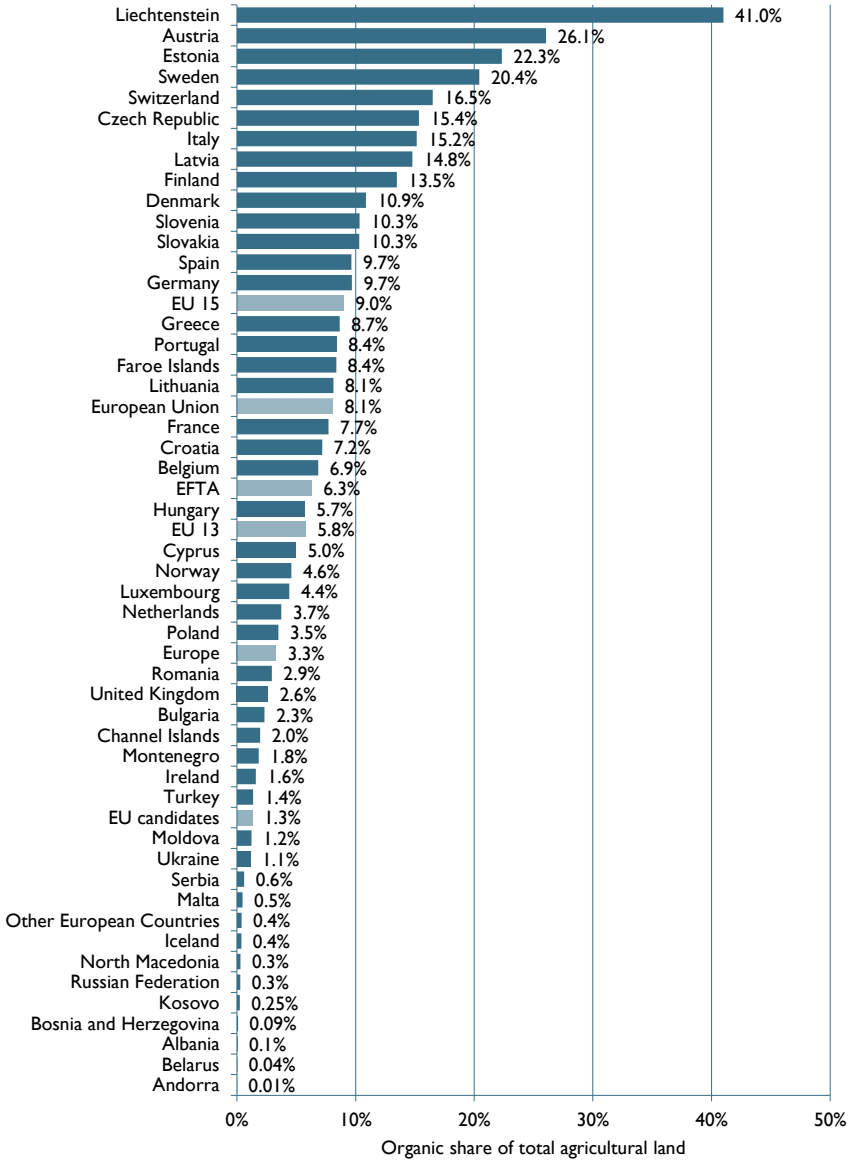


Figure 71: Europe: Organic shares of total agricultural land 2019

Source: FiBL-AMI survey 2021 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 1985-2019

Source: Nic Lampkin, FiBL-AMI survey 2021, based on national data sources and Eurostat

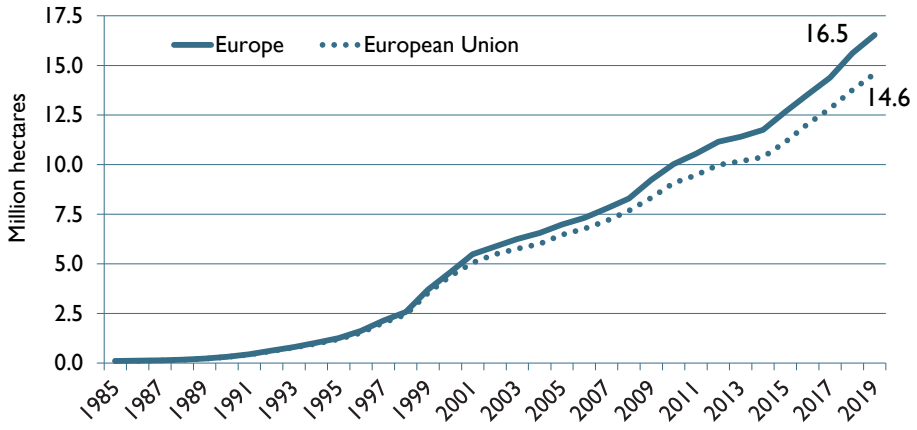


Figure 72: Europe and the European Union: Development of organic agricultural land 1985-2019

Source: FiBL-AMI Surveys 2006-2021 based on national data sources and Eurostat. Data from before 2000 based on surveys from Nic Lampkin. The data for the European Union covers all countries that were members of the European Union in 2019.

Europe and European Union: Growth rates of organic agricultural land 1986-2019

Source: FiBL-AMI survey 2021, based on national data sources and Eurostat

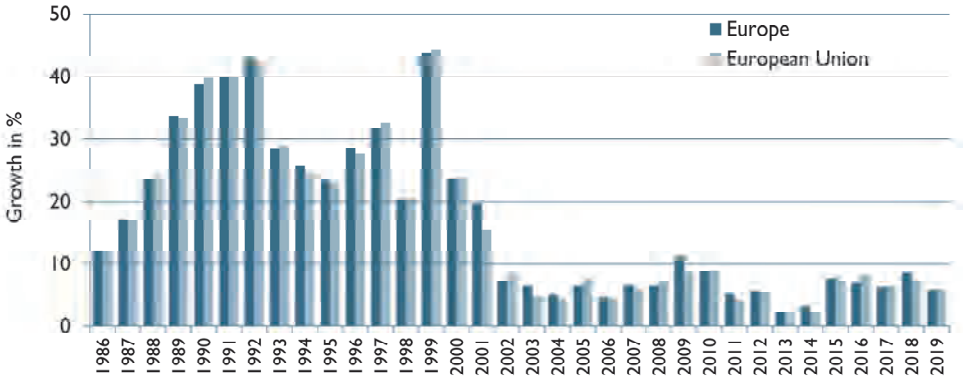


Figure 73: Europe: Growth rates for organic agricultural land in Europe and the European Union 1985-2019

Source: FiBL-AMI Surveys 2006-2021 based on national data sources and Eurostat. Data from before 2000 based on surveys from Nic Lampkin. For detailed data sources see annex.

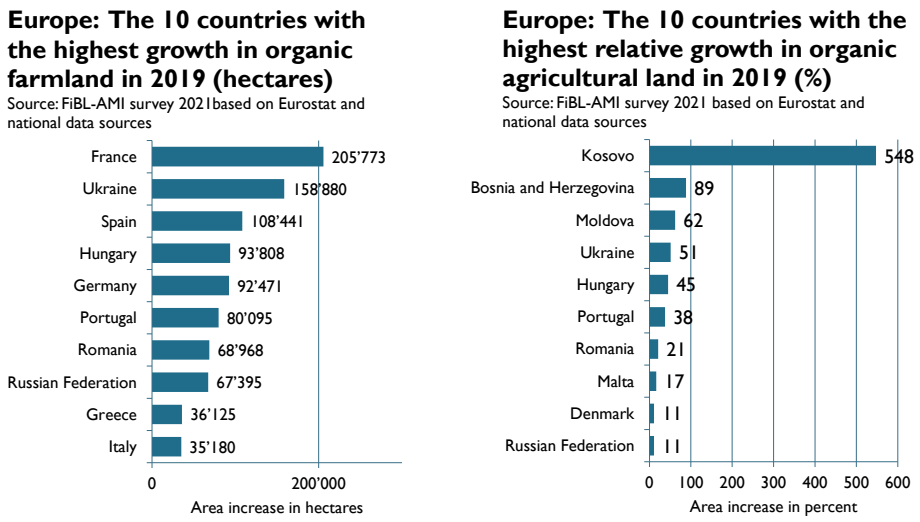


Figure 74: Europe: The ten countries with the highest growth in organic agricultural land in hectares and percentage in 2019

Source: FiBL-AMI survey 2021 based on national data sources and Eurostat
For detailed data sources see annex.

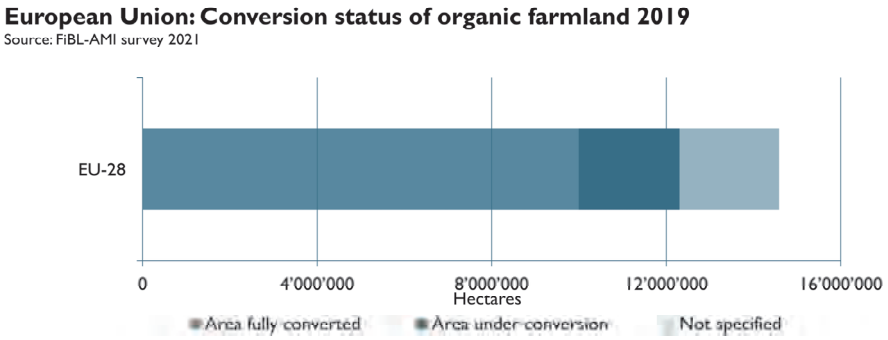


***Figure* 75: Europe and the European Union: Conversion status of organic land in Europe and the European Union 2019**

Source: FiBL-AMI survey 2021 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 60: Europe and the European Union: Land use 2019

Crop group	Europe [Million hectares] (Share of total)	European Union [Million hectares] (Share of total)	Change 2018-2019 Europe/EU [%]	Change 2015-2019 Europe/EU [%]
Arable land	7.8 (3.6%)	6.6 (7.2%)	4.5%/7.5%	38%/39%
Permanent grassland	6.5 (3.5%)	6.4 (10.0%)	4.6%/4.4%	22%/23%
Permanent crops	1.8 (10.5%)	1.6 (13.4%)	4.6%/7.5%	28%/29%
Total	**16.5 (3.3%)**	**14.6 (8.1%)**	**5.9%/5.9%**	**31%/31%**

Source: FiBL-AMI survey 2021 based on national data sources Eurostat.
Note: Total includes other agricultural land and correction values for double-cropped areas.

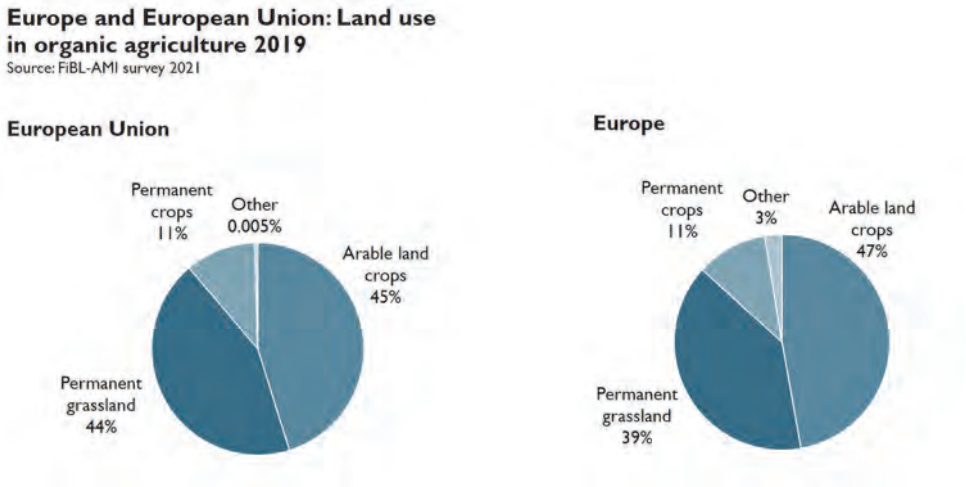


Figure 76: Europe and European Union: Distribution of land use in organic agriculture 2019

Source: FiBL-AMI survey 2021 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 60 and Figure 76 show that arable land constitutes a large part of the organic farmland, with almost 7.8 million hectares in Europe and 6.6 million hectares in the European Union (47 and 45 percent of the organic farmland, respectively). The arable land share is higher in Europe, as the Russian Federation and Ukraine have large areas for producing cereals, oilseed, and dry pulses. Permanent grassland accounted for 6.5 million hectares in Europe and 6.4 million hectares in the European Union. Permanent crops constituted 11 percent of the organic farmland with 1.8 and 1.6 million hectares in Europe and the European Union, respectively.

Compared to total agriculture (based on FAO land use data and not strictly comparable), organic arable land constitutes 3.6 percent of the total arable land in Europe and 7.2 percent in the European Union. Whereas the organic share of total permanent grazing area is as high as 13.4 percent in the European Union, it is lower in Europe (3.5 percent). Permanent crops have the highest organic shares: 13.4 percent in the European Union and 10.5 percent in Europe.

The largest increase in 2018-2019 was in arable crops (4.5 percent in Europe), mainly because additional organic arable area was reported for Germany and France. In the European Union, arable land increased by 7.5 percent. Grassland increased by 4.6 percent in Europe and 7.5 percent in the European Union (Table 60, Figure 78, Figure 79.) Arable land grew by almost 40 percent in the 2015-2019 period, and thus showed a greater increase than the permanent crops, which grew by about 30 percent, and permanent grassland, which grew by more than 20 percent (Table 60, Figure 78, Figure 79). It also shows the intensification of organic agriculture, as the share of extensive grassland is decreasing. By country, the largest permanent grassland or grazing area is in Spain with almost 1.3 million hectares, followed by Germany and France (Figure 77). The largest cropland area (i.e., arable and permanent crops together) are in Italy (1.5 million hectares), France (1.5 million hectares) and Spain (1.1 million hectares) (Figure 77).

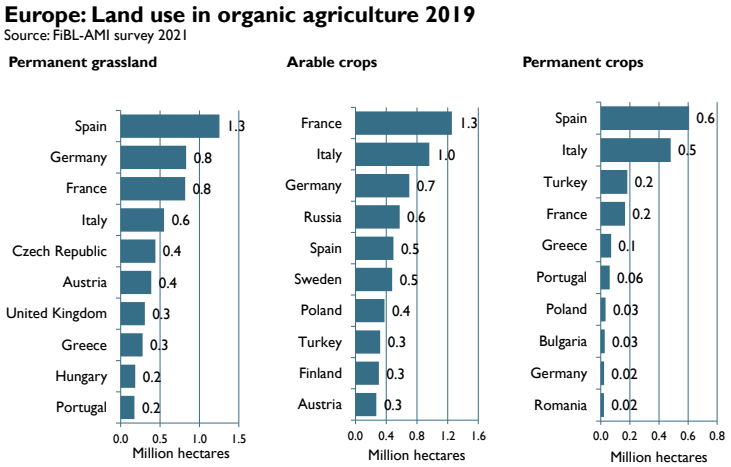


Figure 77: Europe: Land use in organic agriculture by top 10 countries 2019

Source: FiBL-AMI survey 2021 based on Eurostat and national data sources

Europe: Growth area by land use type 2004-2019
Source: FiBL-AMI surveys 2006-2021

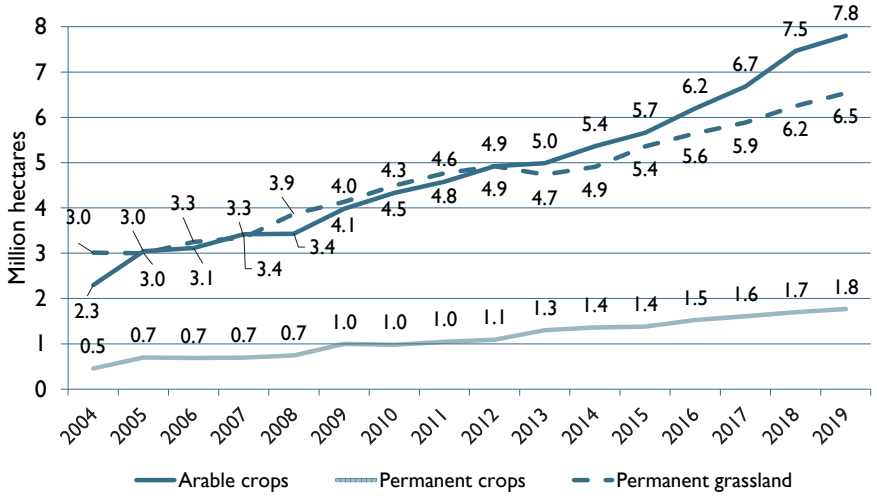


Figure 78: Europe: Growth in organic agricultural land by land use type 2004-2019

Source: FiBL-AMI Surveys 2006-2021 based on national data sources and Eurostat

European Union: Growth area by land use type 2004-2019
Source: FiBL-AMI surveys 2006-2021

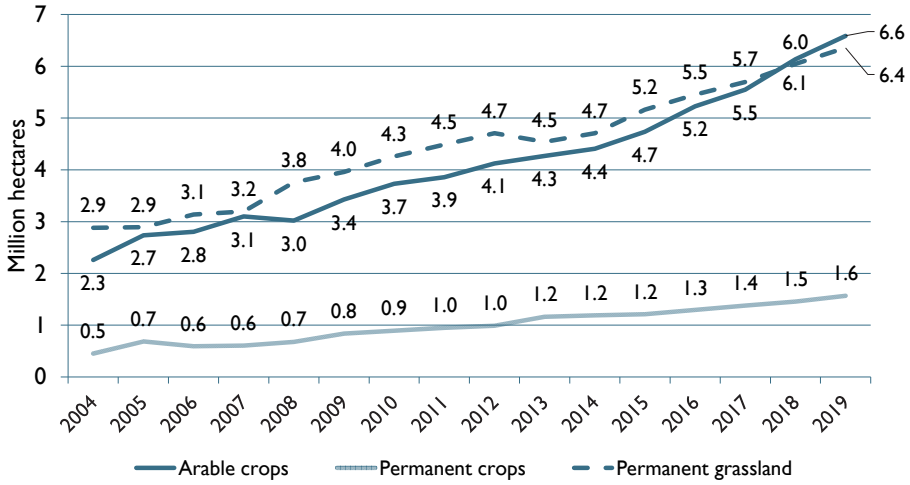


Figure 79: European Union: Growth in organic agricultural land by land use type 2004-2019

Source: FiBL-AMI Surveys 2006-2021 based on national data sources and Eurostat

3.2 Crops grown in organic agriculture

In 2019, all key arable and permanent crop groups showed growth in the European Union (Table 61).

Table 61: Europe and the European Union: Key crops/crop group 2019

	Crop group	Area (ha)		Organic share (%)		Change 2018-2019		Change 2015-2019	
		Europe	EU	Europe	EU	Europe	EU	Europe	EU
Arable crops	Cereals	2'958'165	2'417'003	2.3%	4.3%	12.9%	11.9%	72.5%	70.7%
	Dry pulses	548'275	467'449	8.4%	21.6%	7.1%	3.8%	134.9%	125.0%
	Green fodder	2'568'805	2'511'938	10.5%	11.1%	5.9%	10.7%	61.0%	73.8%
	Oilseeds	653'600	345'071	1.8%	3.1%	29.3%	8.8%	247.3%	139.3%
	Root crops	58'126	50'320	0.7%	1.4%	5.3%	20.6%	41.9%	63.2%
	Vegetables	201'071	186'480	4.4%	8.7%	8.6%	8.6%	84.9%	90.0%
Permanent crops	Berries	45'308	40'833	14.5%	25.5%	13.0%	11.6%	73.7%	63.1%
	Citrus fruit	57'472	56'738	8.7%	11.1%	8.3%	8.4%	121.7%	125.7%
	Grapes	398'659	381'560	10.2%	12.1%	8.8%	9.2%	106.8%	109.7%
	Nuts	336'560	291'653	14.6%	23.5%	-1.8%	4.6%	79.9%	72.6%
	Olives	624'260	541'776	10.5%	10.7%	3.5%	4.8%	69.9%	56.8%
	Temperate fruit	147'926	121'267	5.3%	9.7%	5.7%	7.7%	56.0%	59.0%
	(Sub)Tropical fruit	38'874	18'798	17.8%	12.9%	7.9%	15.9%	124.6%	211.4%

Source: FiBL-AMI survey 2021 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 90 and statistics.fibl.org

Arable crops

A large proportion of the organic arable land (7.9 million hectares in Europe and 6.6 million in the European Union) is used to produce cereals and green fodder from arable land, which 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. In contrast, they have disappeared in conventional farming, as protein crops for animal feed are imported and fertility provided by crop rotations is replaced by fertiliser. Of the major groups, oilseeds and cereals showed the highest increase in land area. Over the 2015-2019 period, the largest growth was noted for oilseeds, which more than doubled. For more information about crop groups by country, see the crop chapters in this book (page 90) and our online database at statistics.fibl.org.

– **Cereals** were the largest crop group in Europe, accounting for 3.0 million hectares or 2.3 percent of the cereal area in Europe. In the European Union, they were the second-largest group, accounting for 2.4 million hectares or 4.3 percent of the total cereal area. Wheat is the most important cereal (1.1 million hectares). The countries with the largest cereal areas are Germany and France (approx. 348´000 hectares), and Italy (including large areas of durum wheat). The highest organic shares of the total cereals area are in Austria (17.5 percent), Estonia (14.8 percent) and Sweden (13.1 percent). Outside the European Union, the Russian Federation, Turkey and Ukraine are major cereal producers.

- In the European Union, the arable crop group with the largest area was for **plants harvested green** (green fodder from arable land) with 2.6 million hectares (Europe: 2.5 million hectares). Clover, green maize, and grass on arable land were the main crop types.
- In 2019, organic **vegetables**[1] were grown on almost 201'000 hectares of land in Europe, and more than 186'000 hectares in the European Union, covering 4.4 percent and 8.7 percent of the vegetable area, respectively. The largest areas were in Italy (64'762 hectares), France (30'690 hectares), and Spain (22'022 hectares). High organic shares of all vegetables are found in Luxembourg (50 percent), Iceland (44.8 percent) and Denmark (33.5 percent).
- With 548'000 hectares in Europe and 467'000 hectares in the European Union, organic **dry pulses** accounted for a large share of all dry pulses (8.4 percent in Europe; 21.6 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 European organic farmers' efforts to improve soil fertility and become less dependent on imports of protein crops. The countries with the largest areas of dry pulses were France (131'070 hectares), Germany (52'000 hectares), Italy (47'523) and Poland (47'101 hectares). The highest organic shares were found in Austria (70 percent), Finland (65 percent), and Denmark (48 percent).

Permanent crops

A large part of the permanent cropland (1.8 million hectares in Europe and 1.6 million hectares in the European Union) is used to grow olives, grapes, and nuts. Olives cover one-third of the permanent crop area, and grapes one fifth. Over the 2015-2019 period, the largest growth was noted for tropical and subtropical fruit, which more than doubled. In Europe, olives (0.62 million hectares) and grapes (0.4 million hectares) cover two-thirds of the permanent cropland (Table 61). Both reach an organic share of more than ten percent of their respective totals.

The organic shares for most permanent crops were higher than those for the arable crops. However, it should be noted that the Eurostat 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 the crop chapters in this book (page 90) and our online database at statistics.fibl.org.

- Spain, France, and Italy had an organic **grape** area of more than 100'000 hectares each. Together with Austria (13.5 percent), they had the highest organic shares of grapes (except some minor organic grape producers that reach even higher shares, such as Poland or Belgium). In Italy, 15.7 percent of the grape area is organic, in France 14.8 percent, and in Spain 12.9 percent.

[1] It should be noted that for some countries, potatoes are included in the vegetable category.

– For **olives**, Italy and Spain also have the lead (242'708 hectares and 209'708 hectares, respectively). France (33 percent) and Italy (21 percent) have the highest organic shares. The largest growth occurred in Spain, where the organic olive area increased by more than 9’000 hectares in 2019.
– Temperate fruits were grown on 147'926 hectares (European Union 121'267 hectares), and they covered 5.3 percent of the total temperate fruit area (9.7 percent in the European Union). Several countries in the European Union had 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 (66’657 hectares), cherries (17’627 hectares), plums (17’602 hectares) and apricots (16’382 hectares). The largest temperate fruit producers were Italy (26'499 hectares), France (23'450 hectares) and Turkey (20'244 hectares).

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 10.6 million hectares (European Union: 7.2 million hectares). The largest wild collection area in Europe (and in the world) is in Finland with 4.6 million hectares (mainly berries). For country details on wild collection areas, see Table 21.

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, considering all currently available information, the organic animal sector is developing rapidly in European countries. Table 62 provides an overview of European organic livestock in 2019. In many countries, organic animal husbandry began with beef, lamb, and milk production. In Europe, lmost 5.1 million bovine animals, more than 5.4 million sheep, almost 1.6 million pigs, and more than 62.3 million poultry were kept. For European Union data, see Table 62.

Table 62: Europe and the European Union: Organic livestock 2019

	Europe				European Union	
	Animals [head]	Organic share of total [%]	Change 2018-2019 [%]	Change 2010-2019 [%]	Animals [head]	Organic share of total [%]
Bovine animals	5'079'962	4.0%	4.1%	80.9%	4'852'303	6.0%
Sheep	5'413'520	3.5%	-9.7%	55.3%	5'214'634	5.3%
Pigs*	1'586'702	0.9%	13.7%	109.6%	1'544'573	1.1%
Poultry**	62'317'071	2.5%	8.0%	110.0%	59'666'753	4.2%

Source: FiBL survey 2021 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 2010-2019 were similar for Europe and the European Union and are 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 621'000 in Europe, and 584'000 in the European Union.*
*** Also for poultry, there is no consistent reporting. According to the Agricultural Market Information Company (AMI), broilers' average stock was 15.1 million Europe and 14.6 million in the European Union. The average stock of laying hens was 27.3 million in Europe and 25.4 million in the European Union.*

The organic share of all livestock remains small compared to some crop groups, depending on the animal species between 0.9 percent and 4.0 percent in Europe (Table 62). Monogastric animals (pigs and poultry) account for the lowest shares. The low shares are due to different reasons. Among these are the insufficient local supply of organic feed, the difficulties in providing traceable certified feed imports, the high investment in pig and poultry barns and pens compared to conventional barns and pens and the high price premiums consumers have to pay. The highest organic shares were for sheep and cattle as the conversion of these rather extensive production

[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 stable 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 presented here should, therefore, be treated with caution and are only an approximation of the overall picture.

schemes is easier. Simultaneously, not all of the organic animal products are sold on the organic market at a premium price.

Between 2010 and 2019, the greatest increase was in poultry (110 percent), partly attributed to the high demand for eggs (see the section on the organic market in Europe; Table 65). However, beef and dairy cattle also grew substantially in that decade (+81 percent), as did sheep (+55 percent) and pigs (+110 percent) (Table 62).

For bovine animals (over 5 million head in Europe), the largest numbers are in Germany, France, and Austria (Table 70). The highest organic shares are in Latvia, Liechtenstein, Sweden, Austria, and Greece (all more than 20 percent). For sheep (5.4 million head in total), the largest numbers are in Greece, the United Kingdom, and France. The highest organic shares are in Latvia, Estonia, and the Czech Republic (all with more than 40 percent).

Looking at the available data for pig stocks, Germany Denmark, France and the Netherlands have the highest numbers (each with more than 100'000 heads). It should be noted that Denmark and France provide the number of slaughtered animals and not the average stock per year; meaning that their numbers are double as high compared to Germany and the Netherlands. Liechtenstein, Denmark and France have the highest shares. For poultry, we assume that – like for pigs – country-level data is not comparable, due to different definitions (Table 70).

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 the rising demand for milk and dairy products. Production now stands at 6.35 million metric tons (European Union: 6.04 million), constituting 3.4 percent of the European Union's milk production from dairy cows in 2019 (Figure 80).

Europe and European Union: Development of organic cow's milk production, 2007-2019
Source: FiBL-AMI surveys 2009-2021

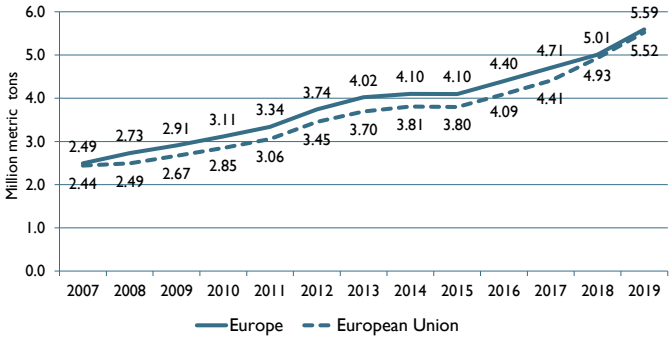


Figure 80: Europe and the European Union: Development of organic cow's milk production 2008-2019

Source: FiBL survey 2009-2021

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 of the latter groups over the years. Hence, in the table below, a ten-year development is not shown for the number of exporters.

Table 63: Europe: Organic operators by country group 2019

	Europe			European Union		
	No.	Growth 1 year	Growth 10 years	No.	Growth 1 year	Growth 10 years
Producers	430'742	2.8%	57.6%	343'858	5.0%	56.0%
Processors	81'719	8.5%	113.3%	78'240	9.1%	109.0%
Importers	6'508	12.1%	120.6%	5'747	13.9%	101.2%
Exporters	3'508	4.7%	N/A	3'127	0.1%	N/A

Source: FiBL-AMI survey 2021 based on national data sources and Eurostat. For a breakdown by country, see Table 71. For detailed data sources, see annex.

5.1 Organic producers

In 2019, there were more than 430'000 organic producers in Europe and almost 344'000 in the European Union (Table 63 and Table 71). In the European Union, the country with the largest number of producers was Italy (more than 70'000); in Europe, it was Turkey (more than 74'500) (Figure 83). Growth in the European Union (+5.0 percent), was stronger than in Europe as a whole (+2.8 percent), mainly due to a significant increase in France, Germany, and Spain. Over the decade 2010-2019, the number of producers in Europe increased by 58 percent (EU: +56 percent). Almost one-sixth of the world's organic farmers are in Europe (Figure 81).

5.2 Organic processors and importers

There were more than 81'719 organic processors in Europe (+8.5 percent compared to 2018) and more than 78'000 in the European Union (+9.1 percent). The country with the largest number of processors was Italy (21'940). More than 6'500 importers (+12.1 percent growth) were counted in Europe and more than 5'700 in the European Union (+13.9 percent). Germany was the country with the most importers (1'831) (Table 63, Table 71, Figure 82).

Europe and European Union: Development of organic producers 2000-2019

Source: FiBL-AMI surveys 2006-2021 based on national data sources and Eurostat

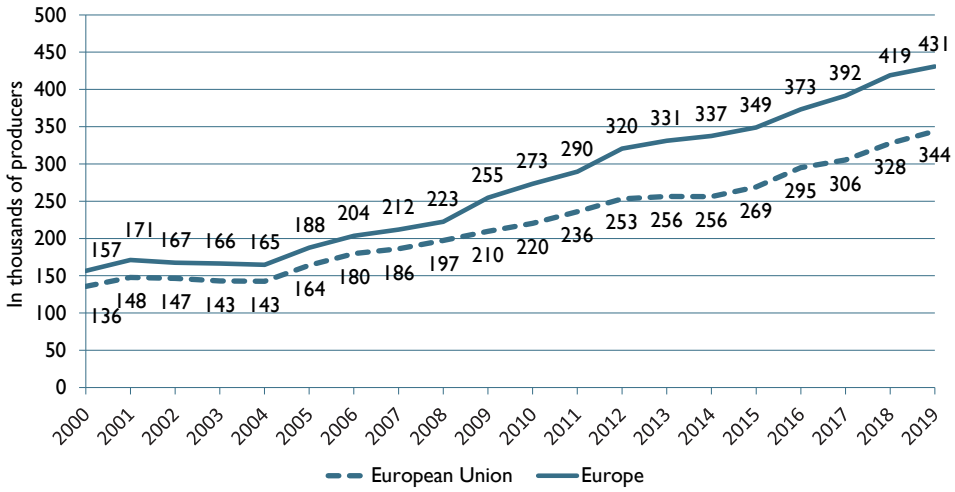
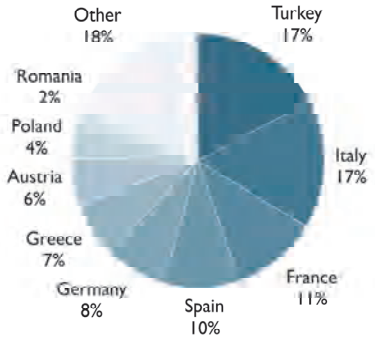


Figure 81: Europe and the European Union: Development of the number of organic producers in 2000-2019

Source: FiBL-AMI surveys 2006-2021 based on national data sources and Eurostat

Europe: Distribution of organic producers 2019

Source: FiBL-AMI survey 2021



Europe: Distribution of organic processors 2019

Source: FiBL-AMI survey 2021

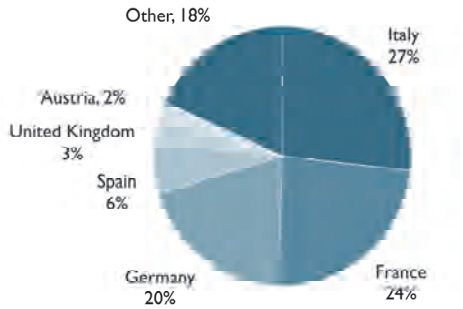


Figure 82: Europe: Distribution of organic producers and processors by country 2019

Source: FiBL-AMI survey 2021, based on national data sources and Eurostat.

Europe: Organic producers by country 2019

Source: FiBL-AMI survey 2021

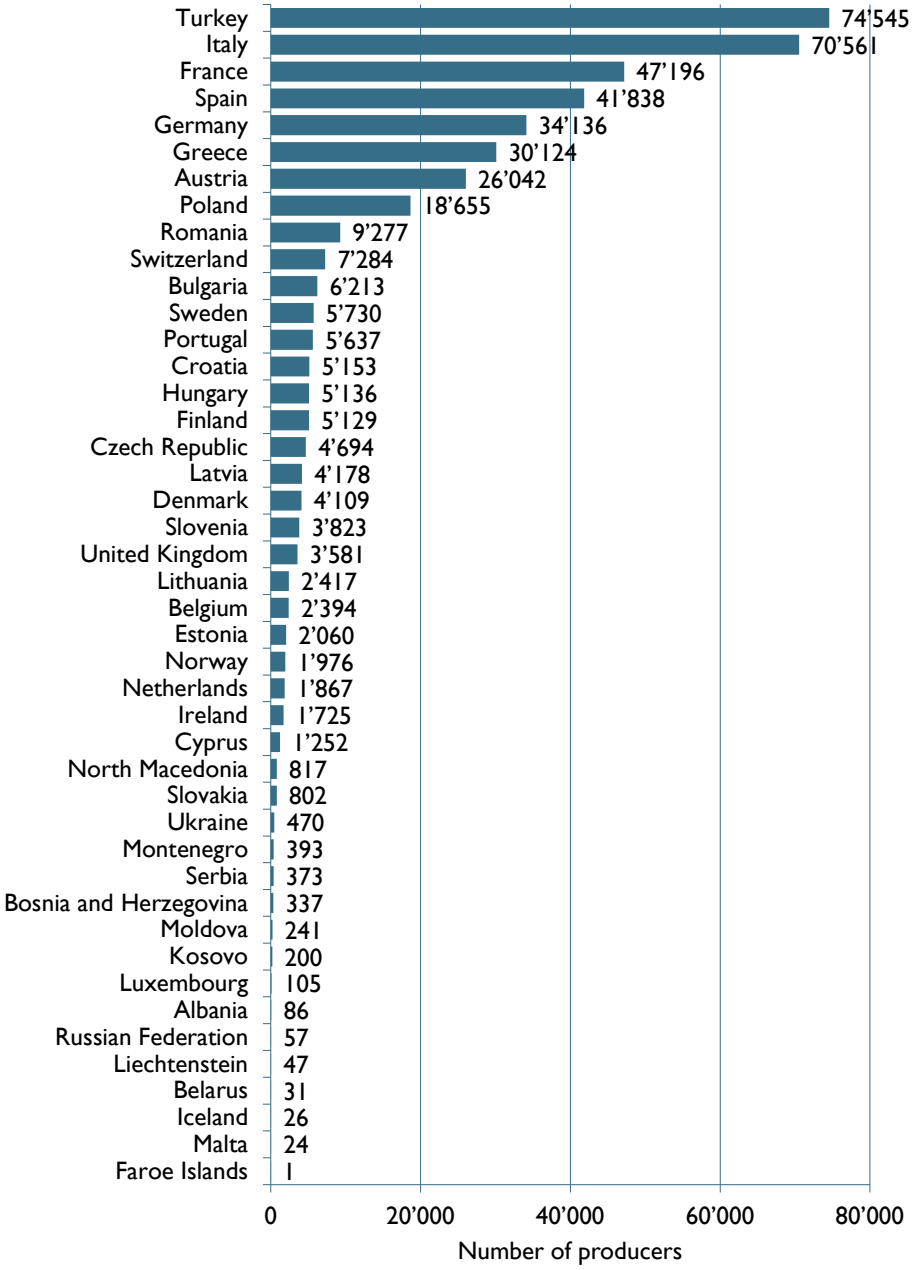


Figure 83: Europe: Number of organic producers by country 2019

Source: FiBL-AMI survey 2021 based on national data sources and Eurostat. For detailed data sources see annex.

6 Organic retail sales

In 2019, the organic market in Europe grew to 45.0 billion euros (European Union: 41.4 billion euros). Unfortunately, not all countries provide data on their domestic markets on a regular basis (Table 72), and it may be assumed that the market is larger than indicated by the figures in Table 64 and Table 72.

Table 64: Europe and the European Union: Organic retail sales 2019: Key data

	Retail sales [Million €]	Per capita consumption [€]	Growth 2018-2019 [%]	Growth 2010-2019 [%]
Europe	45'049	84.0	8.0%	129.9%
European Union	41'453	55.8	8.0%	131.6%

Source: FiBL-AMI survey 2021 based on national data sources. For country details, see annex.

6.1 Size of the organic market

Germany continues to be the largest market in Europe (12.0 billion euros) (Figure 85), and, after the United States, it is the second biggest organic market in the world. France holds second place in Europe with 11.3 billion euros. Comparing organic markets by single market, the United States has the lead. 43 percent of global retail sales of organic products are in the United States (44.7 billion euros), followed by the European Union (41.4 billion euros; 39 percent of organic global retail sales, Figure 84). Comparing retail sales by continent, North America, with 45.5 percent of the world's organic retail sales, is the largest market (48.2 billion euros).

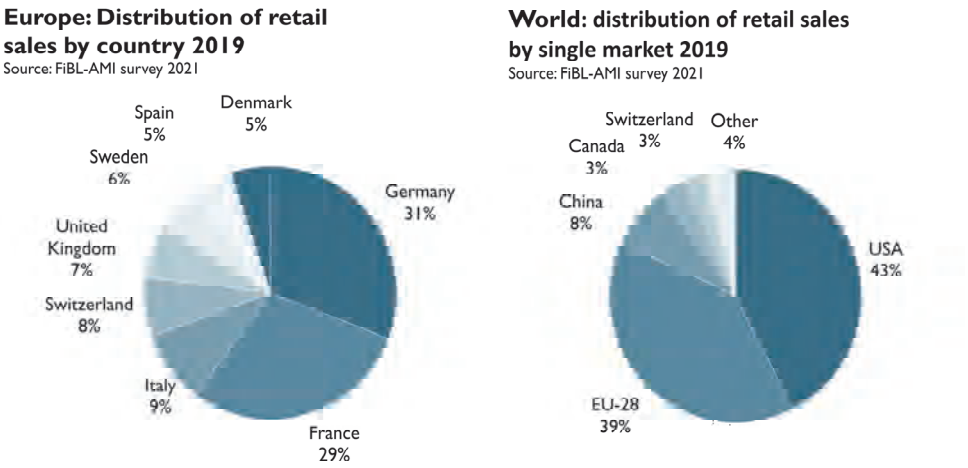


Figure 84: Europe: Distribution of retail sales by country and by single market worldwide 2019

Source: FiBL-AMI survey 2021 based on national data sources

Europe: Organic retail sales value by country 2019

Source: FiBL-AMI survey 2021

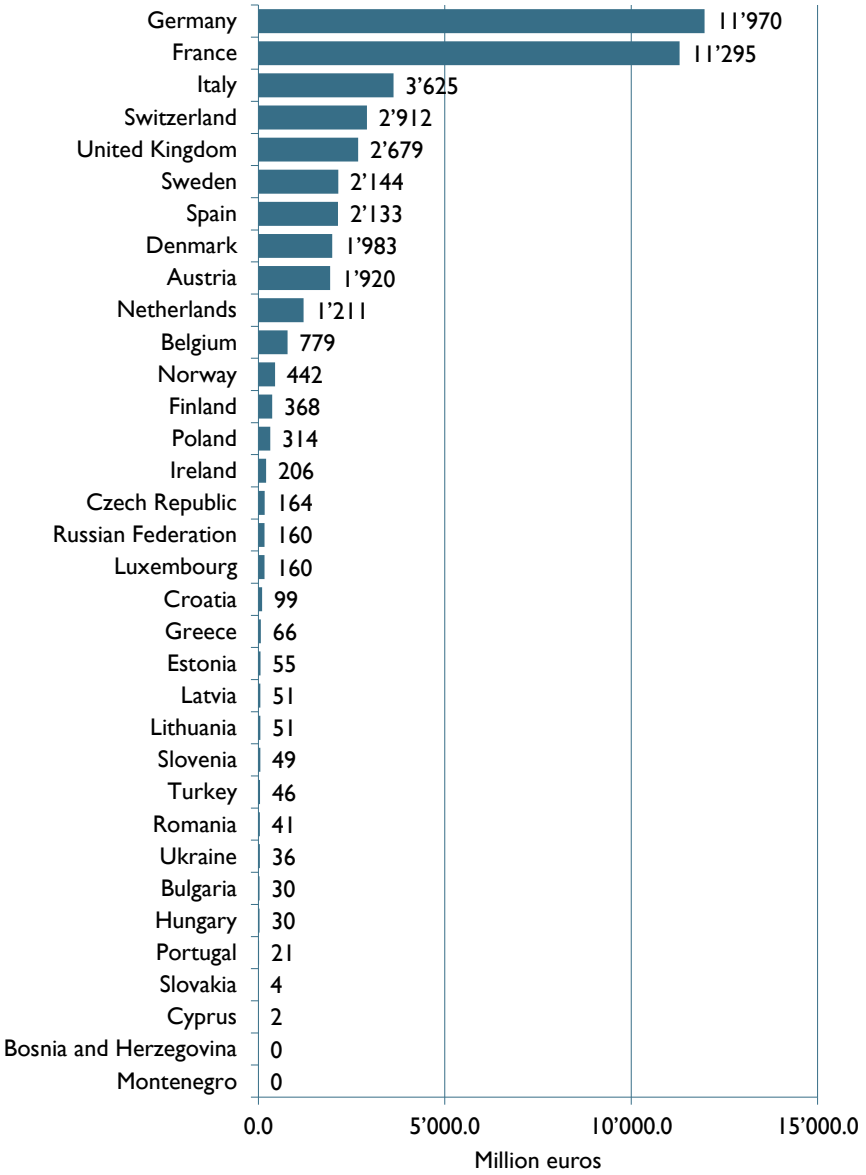


Figure 85: Europe: Retail sales by country 2019

Source: FiBL-AMI survey 2021 based on national data sources (only countries with a turnover of more than one million euros). Please note that 2019 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 and the EU by 8.0 percent. From 2010 to 2019, the organic market more than doubled in size (Figure 86).

All countries for which new data were available showed growth, some in the double-digits (Figure 87). With 13.4 percent, France showed the highest increase, followed by Estonia and Belgium (Figure 87, Table 72).

In the United Kingdom, where retail sales decreased for a couple of years in the previous decade, growth was noted again (4.8 percent increase in 2019). It should be noted that UK sales in euros show a drop for 2015-2017 due to the British pound's exchange rate loss after the Brexit vote.

Europe and European Union: Development of retail sales 2000-2019

Source: FiBL-AMI Surveys 2006-2021, OrganicDataNetwork Surveys 2013-2015

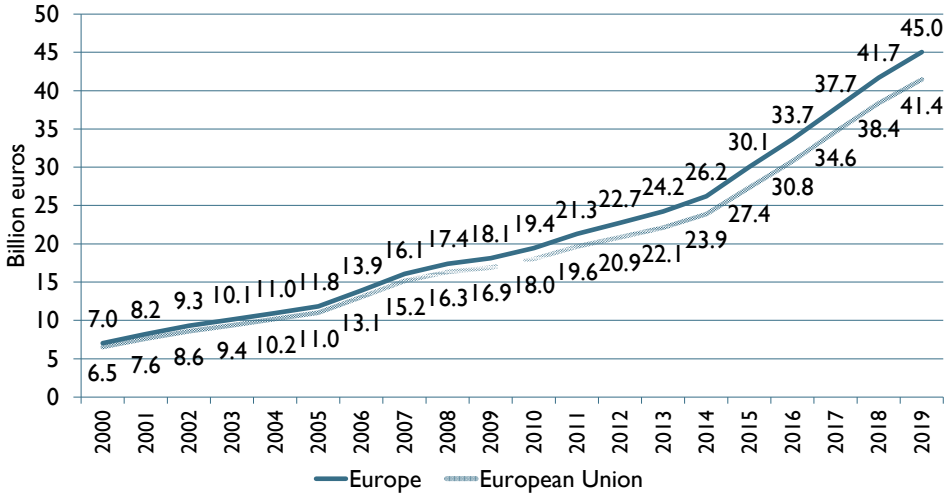


Figure 86: Europe: Growth of organic retail sales in Europe and the European Union, 2000-2019

Source: FiBL-AMI surveys 2004-2021, and OrganicDataNetwork Surveys 2013-2015

Europe: The countries with the highest growth of the organic market 2018-2019
Source: FiBL-AMI survey 2021

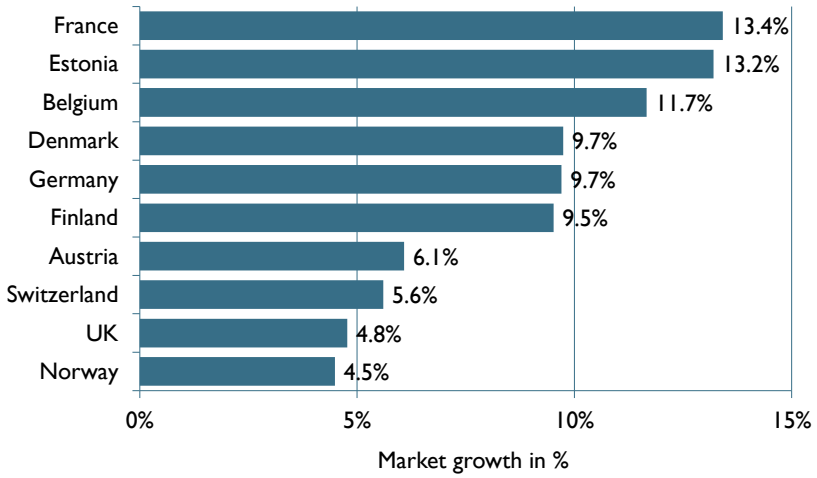


Figure 87: Europe: The countries with the highest organic market growth 2019

Source: FiBL-AMI surveys 2021. 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 Denmark (344 euros) and Switzerland (338 euros). Seven countries had a per capita consumption of more than 100 euros in 2019 (Figure 88, Table 72).

The continual growth in consumer interest is well documented by the development of per capita consumption, with specific notable increase in 2019 (Figure 89). The per capita consumption in Europe rose to 56 euros and to 84 euros in the European Union.

In Central Eastern European countries, consumer spending is still low (Table 72). 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 2019

Source: FiBL-AMI survey 2021

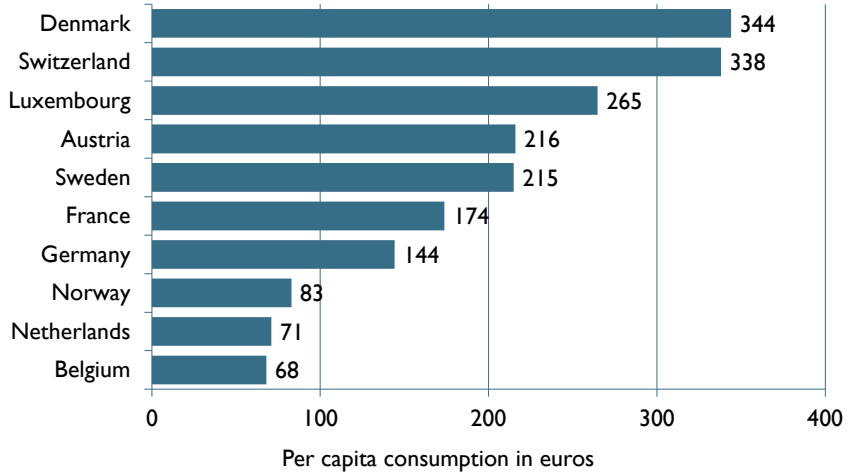


Figure 88: Europe: The countries with the highest per capita consumption 2019

Source: FiBL-AMI survey 2021 based on national data sources. For detailed data sources see annex.

European Union: Growth of the per capita consumption 2009-2019

Source: FiBL-AMI surveys 2006-2021, OrganicDataNetwork Surveys 2013-2015

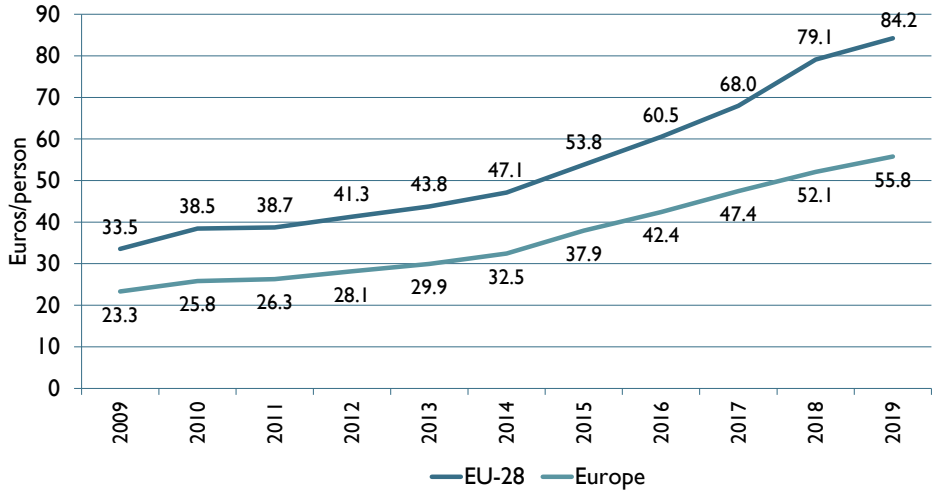


Figure 89: Europe: Growth of the per capita consumption 2010-2019

Source: FiBL-AMI survey 2021 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 of the organic market in a given country. As in the past, the highest market shares were reached in Denmark (12.1 percent, highest organic market share in the world), Switzerland (10.4 percent) and Austria (9.3 percent) (Figure 90, Table 72).

In many countries, the total food market is not growing, and, in many cases, food prices are decreasing, which make organic shares grow even faster. Market shares of individual products and product groups can be far higher; these data are provided in Table 65.

Europe: The countries with the highest organic shares of the total market 2018 and 2019

Source: FiBL-AMI survey 2021

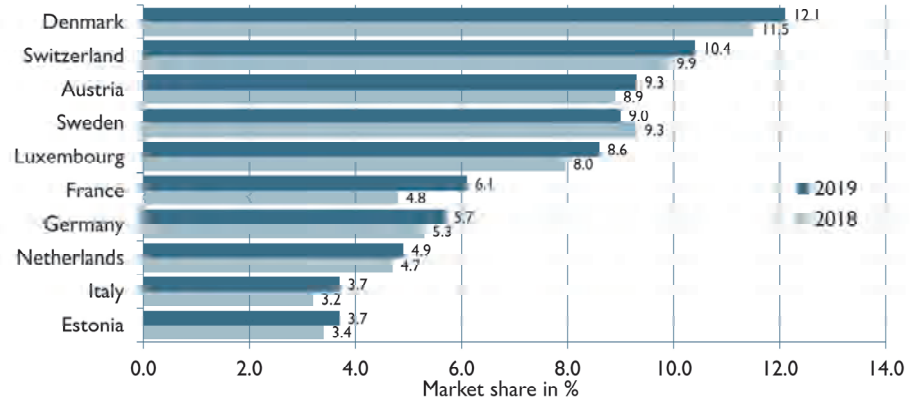


Figure 90: Europe: The countries with the highest shares of the total retail sales 2019

Source: FiBL-AMI survey 2021 based on national data sources. For detailed data sources see annex.

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 entire egg market. Table 65 shows that, in Denmark and France, eggs reach organic market shares of approximately 30 percent (in value).

Table 65: Organic shares for retail sales values (euros) for selected products 2019

	Austria	Belgium (2018)	Czech Republic (2018)	Denmark	Finland	France	Germany	Italy	Netherlands (2018)	Norway (2018)	Spain (2017)	Sweden (2017)	Switzerland	UK
Baby food					23.0	26.9		4.8		33.1				55.4
Beverages			0.4	14.4 (juice)		5.5		3.0		0.5		5.6	4.0	
Bread & bakery products		4.5	0.4			5.3	7.4	4.0	2.6	2.1		3.5	26.1	0.3
Eggs	22.1	18.2		29.6	18.0	37.2	20.6	19.8	15.9	9.5	2.9		28.7	8.8
Fish and fish products		0.6				3.1			1.3	1.5	0.6	12.9		1.1
Fresh vegetables	16.0				4.5	7.6	9.8	4.7		4.2	3.3	12.2	23.1	4.3
Fruit	11.0				7.5	8.8	7.5	6.6		2.2	1.7	18.4	17.5	2.8
Vegetables and fruit	13.6		1.3			8.2		7.7	5.8				20.3	0.5
Meat and meat products	3.8		0.2	8.0 (beef)		3.2	2.9	2.9	4.7	0.5	1.2	2.9	6.2	1.5
Milk and dairy products	12.4		1.4			5.8	8.5	3.6	5.6	2.1	1.1	10.4	11.0	3.5
- Butter	11.2	4.7		16.8		7.4	4.5	2.8		3.1				
- Cheese	10.3			6.8		2.6	4.7	1.0		0.7			7.6	1.1
- Milk	21.8	3.3		32.3	4.5	15.7	12.4	8.1		4.4			24.9	5.5
- Yoghurt	23.7	10.1				9.1	8.2	6.1		0.7				7.8

Sources: FiBL-AMI survey 2021, 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, for some products supermarket sale ; Germany: Agricultural Market Information Company AMI based on GfK; Italy: supermarkets and discounters only, data provided by tMarche Polytechnic University; 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.

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 a market share of 30 percent. Individual products can reach even higher market shares. Organic oatmeal (over 52 percent in Denmark) or organic milk substitutes (61 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 72). Figure 91 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 specialised retailers play a significant role, even though their importance is decreasing, as shown in Figure 92.

In Germany, supermarkets have become the driving force in the market, whereas specialised retailers face more and more competition. While in 2014, 33 percent of all organic products were sold in organic food shops, this number decreased to 26.6 percent in 2019. Supermarket chains have founded partnerships with organic associations and sell products with their brands. Best examples are the Bioland-Lidl, the Naturland-Rewe, or the Demeter-Kaufland partnerships. These partnerships open *possibilities* for farmers and processors to market domestic products.

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, and the supermarket chains have helped 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.

Retail sales by channel in selected European countries 2019, based on retail sales value (million euros)
Source: FiBL-AMI survey 2021

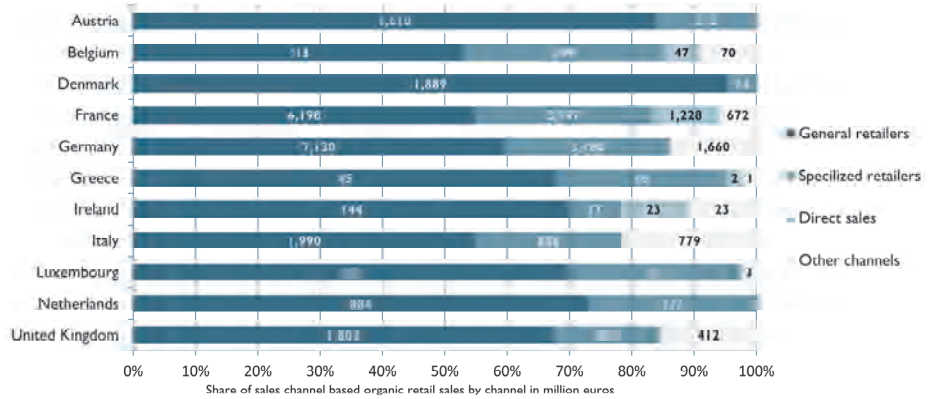


Figure 91: Europe: Marketing channels for organic products in selected countries 2019

Source: FiBL-AMI survey 2021 based on national data sources.
For detailed data sources see annex.

European Union: Development of organic retail sales by channel for selected countries 2017-2019
Source: Austria: AMA Marketing, Denmark: Organic Denmark/LV, France: Agence Bio, Germany: Arbeitskreis Biomarkt, Italy: AssoBio/Nomisma, Switzerland: Bio Suisse

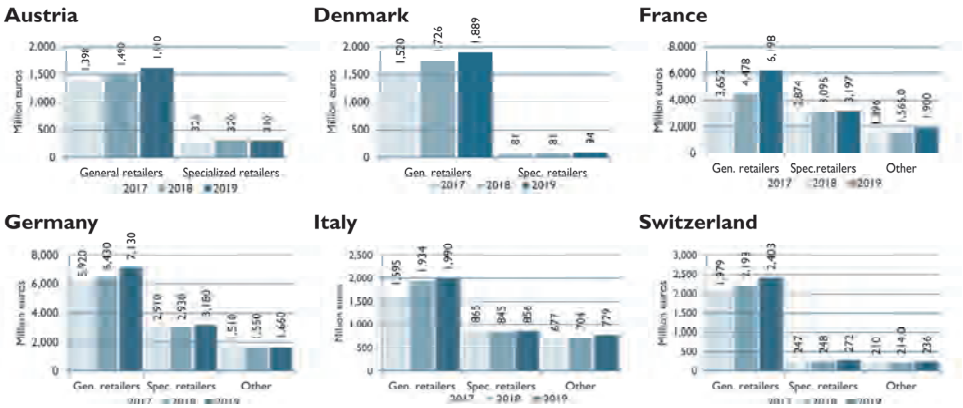


Figure 92: Europe: Growth of marketing channels for organic products 2017-2019 in selected countries

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 second time, the key import products and key

importing countries (based on volume in metric tons). In 2019, the EU imported a total of 3.2 million tonnes of organic agri-food products. Imports of tropical fruit (fresh or dried), nuts and spices represented the single biggest category, totalling 885'930 tonnes or 27.3 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 433'705 tonnes; that is 13.4 percent of the total organic import volume. For more information, see the contribution about EU organic imports on page 140.

6.8 Impact of COVID-19 on the organic market

The COVID-19 pandemic has had a tremendous impact on most people's purchasing behaviour and thus has given the organic market an unprecedented upturn in many countries. People stay at home to eat most of the time, and out-of-home meals are reduced to a minimum. On the other hand, in general, food sales in supermarkets have increased rapidly, for example in Germany, an increase of more than ten percent has been observed since the beginning of the pandemic. Organic food sales have accelerated even faster. When consumers have the choice, which they don't have in canteens and restaurants, they reach more often for organic products, for example, the organic market in Germany in 2020 growth was double as strong as the general food market. Health, environment, and climate change have become big issues among the population – even more in the pandemic. Consuming organic food is a possibility to afford something good, at times, when travelling, restaurant and theatre visits are not possible. And supermarkets, as well as natural food stores and direct marketers, fulfil consumers desire for healthier, more regional, and organic products.

Many shops have become inventive in selling food, adapting to the consumers' preference to not leave the home, or not go too far for shopping. Online-sales such as subscription boxes for organic have grown tremendously and other forms of contactless shopping such as 'Click and Collect'.

Will this development in the organic sector continue once the pandemic is over? Most experts see at least a similar sales level, as people's awareness of organic and environmental and health issues will remain. Decreasing incomes in some population groups can reduce retail sales, but this was not observed until now.

On the agricultural side: with the growing market, organic production and processing need grow at the same level, like the market. Up to now, small and medium-sized enterprises have dominated the organic processing. They will need to grow, or new enterprises have to enter the market. Especially intensive crop production and animal production and the processing of these products are needed. The European Union's Farm to Fork-strategy can support this development with several measures.

7 Conclusion

Available data on organic farming in the global and European market shows 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 and

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 – and the effects of these efforts are now visible, with production growing at the same pace as the market. Now more processing, storing and distribution facilities are needed to process larger amounts of raw products.

While the COVID19 pandemic has shown that there is a potential for the organic market to expand faster, recent calculations by FiBL, based on past trends, indicate that data availability and quality remain an issue when it come to forecasting trends. International trade data remain scarce. Therefore, a major development is the new European import statistics, which show the products and the major exporting countries targeting the European Union for the second time (European Commission 2019 and 2020). The availability of these statistics 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 domestic market data availability 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. Thus, little is known about the importance of organic product sales. Therefore, we recommend that data availability and accessibility increase, that classifications, nomenclature, and definitions, particularly for organic market data, are harmonised, and data quality is improved.

8 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, particularly the OrganicDataNetwork project partners.

Data collection was expanded in the framework of a project by IFOAM Organics Europe, which allowed us to further develop our interactive infographics and make progress on forecasting the development of the organic area and market.

[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.

References and further reading

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Note on data collection and countries covered

Like in the rest of the world, data collection in Europe is carried out using multiple information sources. However, we would like to point out that Eurostat, the European Union's statistical office, 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 article 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 that 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 United Kingdom is still counted as an EU member for 2019 data.
- 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,
- Other European countries: Andorra, Belarus, Moldova, Russian Federation, San Marino and Ukraine.

Organic Agriculture in Europe: Tables

Table 66: Europe: Organic agricultural land by country 2019

Country	Organic area [ha]	Organic share [%]	Change 2018-19 [%]	Change 2010-19 [%]	Change 2018-19 [ha]
Albania	653	0.1%	-12.5%	129.9%	-94
Andorra	2	0.0%	0.0%	0.0%	0
Austria	669'921	26.1%	5.0%	17.9%	32'116
Belarus	1'375	0.0%	1.0%	N/A	14
Belgium	93'119	6.9%	4.6%	57.2%	4'094
Bosnia and Herzegovina	1'692	0.1%	88.8%	191.7%	796
Bulgaria	117'779	2.3%	-8.6%	359.2%	-11'074
Channel Islands	180	2.0%	0.0%	-50.0%	0
Croatia	108'127	7.2%	4.8%	363.0%	4'961
Cyprus	6'240	5.0%	3.6%	74.5%	218
Czech Republic	540'986	15.4%	0.4%	20.7%	2'093
Denmark	285'526	10.9%	11.2%	75.3%	28'815
Estonia	220'737	22.3%	6.8%	95.4%	14'147
Faroe Islands	251	8.4%	0.0%	-0.7%	0
Finland	306'484	13.5%	3.0%	81.2%	9'042
France	2'240'797	7.7%	10.1%	165.0%	205'773
Germany	1'613'785	9.7%	7.7%	62.9%	92'471
Greece	528'752	8.7%	7.3%	70.7%	36'125
Hungary	303'190	5.7%	44.8%	137.6%	93'808
Iceland	5'740	0.4%	-76.9%	-1.1%	-19'115
Ireland	73'952	1.6%	-37.7%	54.5%	-44'747
Italy	1'993'225	15.2%	1.8%	79.0%	35'180
Kosovo	1'036	0.2%	547.5%	N/A	876
Latvia	289'796	14.8%	3.4%	74.2%	9'413
Liechtenstein	1'470	41.0%	4.0%	44.1%	57
Lithuania	242'118	8.1%	1.0%	68.6%	2'427
Luxembourg	5'814	4.4%	0.6%	56.3%	32
Malta	55	0.5%	16.5%	129.2%	8
Moldova	27'833	1.2%	62.3%	-13.3%	10'682
Montenegro	4'751	1.8%	6.7%	33.4%	297
Netherlands	68'068	3.7%	6.7%	47.2%	4'259
North Macedonia	3'711	0.3%	-15.8%	-89.4%	-698
Norway	45'312	4.6%	-2.3%	-20.8%	-1'065
Poland	507'637	3.5%	4.7%	-2.7%	22'961
Portugal	293'213	8.2%	37.6%	45.8%	80'095
Romania	395'228	2.9%	21.1%	116.3%	68'968
Russian Federation	674'370	0.3%	11.1%	1432.1%	67'395
Serbia	21'266	0.6%	10.4%	146.3%	2'011
Slovakia	197'565	10.3%	4.5%	13.2%	8'579
Slovenia	49'638	10.3%	3.7%	61.7%	1'790
Spain	2'354'916	9.7%	4.8%	61.7%	108'441
Sweden	613'964	20.4%	0.9%	40.0%	5'206
Switzerland	172'713	16.5%	7.3%	54.9%	11'721
Turkey	518'435	1.4%	-19.8%	35.1%	-127'812
Ukraine	467'980	1.1%	51.4%	73.2%	158'880
United Kingdom	459'275	2.6%	0.4%	-34.4%	1'898
Europe	**16'528'677**	**3.3%**	**5.9%**	**64.8%**	**921'042**
European Union	**14'579'907**	**8.1%**	**5.9%**	**60.7%**	**817'097**

Source: *FiBL-AMI survey 2021 based on Eurostat and national data sources. For data sources, see annex.*

Table 67: Europe: Conversion status of organic agricultural land 2019

Country	Area [ha]	Fully converted [ha]	Conversion area [ha]
Albania	653	528	92
Andorra	2	2	
Austria	669'921		
Belarus	1'375		
Belgium	93'119	78'323	14'796
Bosnia and Herzegovina	1'692	1'279	413
Bulgaria	117'779	95'555	22'225
Channel Islands	180	180	
Croatia	108'127	77'469	30'658
Cyprus	6'240	5'382	858
Czech Republic	540'986	485'174	49'241
Denmark	285'526	211'685	73'841
Estonia	220'737	192'976	27'761
Faroe Islands	251	251	
Finland	306'484	257'317	49'167
France	2'240'797	1'675'226	565'571
Germany	1'613'785		
Greece	528'752	385'782	142'970
Hungary	303'190	185'227	117'963
Iceland	5'740	5'725	15
Ireland	73'952		
Italy	1'993'225	1'610'099	383'127
Kosovo	1'036	1'002	34
Latvia	289'796	262'105	27'691
Liechtenstein	1'470		60
Lithuania	242'118	227'349	14'769
Luxembourg	5'814	5'180	634
Malta	55	40	15
Moldova	27'833	20'736	7'097
Montenegro	4'751	4'049	703
Netherlands	68'068	63'200	4'868
North Macedonia	3'711	2'904	1'801
Norway	45'312	82'838	4'160
Poland	507'637	390'274	117'363
Portugal	293'213	273'158	20'055
Romania	395'228	211'487	183'741
Russian Federation	674'370	308'595	13'268
Serbia	21'266	13'726	7'539
Slovakia	197'565	177'921	19'644
Slovenia	49'638	44'455	5'183
Spain	2'354'916	2'008'294	346'622
Sweden	613'964	555'788	58'176
Switzerland	172'713		
Turkey	518'435	358'647	159'787
Ukraine	467'980	384'529	83'451
United Kingdom	459'275	432'766	26'509
Europe	**16'528'677**	**11'097'224**	**2'581'867**
European Union	**14'579'907**	**9'912'232**	**2'303'448**

Source: *FiBL-AMI survey 2021 based on Eurostat and national data sources. For data sources, see annex.*

Table 68: Europe: Land use in organic agriculture by country 2019

Country	Arable land crops [ha]	Permanent crops [ha]	Permanent grassland [ha]	Total [ha]
Albania	566	87		653
Andorra		2		2
Austria	270'786	11'391	387'744	669'921
Belarus	1'084	47	80	1'210
Belgium	31'789	1'418	58'123	91'331
Bosnia and Herzegovina	1'532	159		1'691
Bulgaria	63'940	26'486	27'339	117'765
Croatia	52'586	14'893	40'648	108'127
Cyprus	3'041	3'027	172	6'240
Czech Republic	87'717	5'654	441'044	534'414
Denmark	235'178	3'252	47'096	285'526
Estonia	120'467	2'549	97'721	220'737
Faroe Islands	1		250	251
Finland	303'882	678	1'924	306'484
France	1'255'369	167'041	818'387	2'240'797
Germany	700'000	23'000	830'000	1'613'785
Greece	179'003	70'200	279'549	528'752
Hungary	103'887	14'520	184'783	303'190
Iceland	629	2	5'110	5'741
Ireland	4'319	64	69'323	73'706
Italy	961'692	480'459	551'074	1'993'225
Kosovo	1'002	34		1'036
Latvia	150'567	3'003	136'226	289'796
Liechtenstein	244	8	1'136	1'388
Lithuania	150'816	5'387	85'915	242'118
Luxembourg	2'630	201	2'983	5'814
Malta	28	27		55
Moldova	23'256	4'577		27'833
Montenegro	319	508	3'925	4'752
Netherlands	27'306	825	39'937	68'068
North Macedonia	3'051	657		3'708
Norway	36'504	335	8'473	45'312
Poland	375'740	31'924	99'973	507'637
Portugal	55'675	61'196	176'342	293'213
Romania	257'665	22'143	115'420	395'228
Russian Federation	573'872	36	11'071	584'978
Serbia	10'647	5'268	5'350	21'265
Slovakia	68'022	1'797	127'746	197'565
Slovenia	6'521	3'089	40'028	49'638
Spain	494'213	606'406	1'254'296	2'354'915
Sweden	476'981	610	136'372	613'963
Switzerland	41'075	3'108	125'452	169'636
Turkey	321'166	182'473	14'796	518'435
Ukraine	194'631	4'302	4'164	467'980
United Kingdom	148'629	5'161	305'472	459'262
Europe	**7'797'978**	**1'768'035**	**6'535'444**	**16'528'677**
European Union	**6'588'400**	**1'566'432**	**6'355'637**	**14'579'907**

Source: FiBL-AMI survey 2021 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 69: Europe: Organic agricultural land and wild collection areas by country 2019

Country	Agricultural land [ha]	Wild collection [ha]	Total [ha]
Albania	653	645'042	645'695
Andorra	2		2
Austria	669'921		669'921
Belarus	1'360	946'897	948'259
Belgium	93'119	3	93'121
Bosnia and Herzegovina	1'692	11'579	13'271
Bulgaria	117'779	307'020	424'799
Channel Islands	180		180
Croatia	108'127		108'127
Cyprus	6'240		6'240
Czech Republic	540'986		540'986
Denmark	285'526	2'648	288'174
Estonia	220'737	104'305	325'042
Faroe Islands	251	0	251
Finland	306'484	4'600'000	4'906'484
France	2'240'797		2'240'797
Germany	1'613'785		1'613'785
Greece	528'752	317'053	845'805
Hungary	303'190		303'190
Iceland	5'741		5'741
Ireland	73'952		73'952
Italy	1'993'225		1'993'225
Kosovo	1'036	179'580	180'616
Latvia	289'796		289'796
Liechtenstein	1'470		1'470
Lithuania	242'118		242'118
Luxembourg	5'814		5'814
Malta	55		55
Moldova	27'833	1'845	29'678
Montenegro	4'752	143'410	148'161
Netherlands	68'068		68'068
North Macedonia	3'708	556'600	560'308
Norway	45'312		45'312
Poland	507'637		507'637
Portugal	293'213	40'000	352'746
Romania	395'228	1'787'548	2'182'776
Russian Federation	673'689	158'052	833'676
Serbia	21'265		21'265
Slovakia	197'565		197'565
Slovenia	49'638	13'238	62'876
Spain	2'354'916	38'184	2'393'100
Sweden	613'964		613'964
Switzerland	172'573		172'573
Turkey	518'435	180'336	698'771
Ukraine	467'980	580'000	1'047'798
United Kingdom	459'275		459'275
Europe	**16'528'677**	**10'613'341**	**27'162'468**
European Union	**14'579'907**	**7'209'999**	**21'789'906**

Source: FiBL-AMI survey 2021 based on Eurostat and national data sources. For data sources, see annex.

Table 70: Europe: Organic livestock by country 2019

Country	Bovine animals		Pigs		Poultry		Sheep	
	No	Share (%)	No	Share (%)	No	Share (%)	No	Share (%)
Austria	420'693	21.3%	74'603	2.5%	2'840'750	16.8%	123'541	34.2%
Belarus		0.0%		0.0%		0.0%		0.0%
Belgium	107'690	4.3%	17'081	0.3%	4'592'154	12.7%	27'349	22.9%
Bulgaria	9'402	1.7%	91	0.0%	2'260	0.0%	22'780	1.6%
Croatia	21'558	4.8%	2'873	0.2%	1'523	0.0%	65'632	9.7%
Cyprus	731	1.3%		0.0%	21'233	0.7%	971	0.3%
Czech Republic	262'910	19.4%	2'707	0.2%	54'174	0.3%	87'863	39.8%
Denmark	224'348	14.0%	490'924	4.0%	3'349'215	22.8%	11'435	7.4%
Estonia	42'290	17.2%	683	0.2%	36'315	1.7%	32'504	42.3%
Finland	76'173	8.4%	5'156	0.4%	335'538	5.3%	32'883	25.3%
France	830'921	4.4%	437'950	3.2%	22'713'723	10.6%	737'091	9.9%
Germany	894'460	18.3%	183'850	0.9%	10'209'000	7.8%	159'000	12.2%
Greece	142'609	20.8%	8'782	0.8%	252'280	0.8%	1'299'677	13.6%
Hungary	54'014	7.7%	10'972	0.4%	131'367	0.3%	11'801	1.1%
Iceland	284	0.4%		0.0%		0.0%	1'241	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	99'041	26.0%	1'925	0.5%	45'296	1.0%	37'759	47.2%
Liechtenstein	1'618	25.7%	70	4.0%	3'414		1'230	32.4%
Lithuania	58'356	7.8%	131	0.0%	10'108	0.1%	23'076	38.2%
Luxembourg	4'814	2.6%	1'026	1.1%	33'982	30.1%	837	10.2%
Montenegro	578	0.7%		0.0%	160	0.0%	1'787	0.9%
Netherlands	71'817	1.9%	106'458	0.9%	3'926'491	4.1%	15'129	1.5%
North Macedonia	6'390	2.5%		0.0%		0.0%	101'317	13.8%
Norway	7'932	0.9%	2'820	0.3%	611'427	13.1%		0.0%
Poland	30'186	0.5%	4'189	0.0%	484'153	0.4%	22'757	8.5%
Portugal	95'306	6.4%	6'757	0.3%	64'630	0.1%	94'117	4.5%
Romania	19'358	1.0%	9	0.0%	128'596	0.1%	19'367	0.2%
Russia	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	61'432	13.3%	642	0.1%	5'863	0.1%	93'875	23.8%
Slovenia	37'126	8.0%	3'252	0.9%	96'641	4.3%	35'225	29.4%
Spain	215'802	3.7%	32'343	0.1%	1'826'581	1.3%	594'875	3.6%
Sweden	333'245	22.2%	36'649	2.7%	1'395'620	16.6%	119'166	19.5%
Switzerland	205'389	13.5%	38'955	2.9%	1'184'263	9.9%	86'679	25.2%
Ukraine	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
United Kingdom	300'788	3.0%	55'255	1.2%	3'465'009	2.2%	782'253	2.4%
Europe	**5'079'962**	**4.0%**	**1'586'702**	**0.9%**	**62'317'071**	**2.5%**	**5'413'520**	**3.5%**
European Union	**4'852'303**	**6.0%**	**1'544'573**	**1.1%**	**59'666'753**	**4.2%**	**5'214'634**	**5.3%**

Source: FiBL survey 2021 based on Eurostat and national data sources. For data sources, see annex.
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. Therefore, adding up the data for pigs and poultry over all countries is not completely reliable, and country data are not necessarily comparable. Therefore, the data presented here should be treated with caution and only approximate the overall picture.

Table 71: Europe: Organic producers, processors, and importers by country 2019

Country	Producers	Processors	Importers	Exporters
Albania	86	8		25
Andorra		3		
Austria	26'042	1'691	58	4
Belarus	31	24		7
Belgium	2'394	1'585	304	153
Bosnia and Herzegovina	337	74		20
Bulgaria	6'213	234	26	4
Croatia	5'153	395	22	3
Cyprus	1'252	61	14	
Czech Republic	4'694	802	311	163
Denmark	4'109	1'092	94	99
Estonia	2'060	173	38	16
Faroe Islands	1	1		
Finland	5'129	399	63	20
France	47'196	19'311	662	
Germany	34'136	16'162	1'831	1'288
Greece	30'124	1'642	44	52
Hungary	5'136	523	44	
Iceland	26	20	2	
Ireland	1'725	26	24	2
Italy	70'561	21'940	527	741
Kosovo	200	35		8
Latvia	4'178	51	10	0
Liechtenstein	47			
Lithuania	2'417	124	3	
Luxembourg	105	101	7	
Malta	24	7	14	
Moldova	241	21	3	52
Monaco		2		
Montenegro	393	11		
Netherlands	1'867	1'021	462	120
North Macedonia	817	23	5	7
Norway	1'976	428	94	
Poland	18'655	636	238	256
Portugal	5'637	933	41	34
Romania	9'277	191	24	15
Russian Federation	57	39		14
San Marino		2		
Serbia	373	123	51	3
Slovakia	802	85	22	1
Slovenia	3'823	142	27	
Spain	41'838	5'230	364	137
Sweden	5'730	1'117	257	19
Switzerland	7'284	1'289	548	18
Turkey	74'545	1'356	58	209
Ukraine	470	20		18
United Kingdom	3'581	2'566	216	
Europe	**430'742**	**81'719**	**6'508**	**3'508**
European Union	**343'858**	**78'240**	**5'747**	**3'127**

Source: FiBL-AMI survey 2021 based on Eurostat and national data sources. For data sources see annex.
**Total number includes data for countries with less than three operators.*

Table 72: Europe: The organic food market 2019

Country	Data year	Retail sales [Million €]	€/person [€]	Organic share [%]	One year growth [%]	Food-service [Million €]	Exports [Million €]
Austria	2019	1'920	216	9.3%	6.1%	140	
Belgium	2019	779	68	3.1%	11.7%		
Bosnia and Herzegovina	2017	0	0				
Bulgaria	2018	30					
	2019		4	0.4%			
Croatia	2018	99	24	2.2%			
Cyprus	2006	2	2	0.1%			
Czechia	2018	164	16	1.6%		8	
Denmark	2015						266
	2019	1'979	344	12.1%	9.7%	349	
Estonia	2019	62		3.7%	13.2%		17
Finland	2019	368	67	2.6%	9.5%		
France	2013						93
France	2019	11'295	174	6.1%	13.4%	639	
Germany	2009					300	
	2019	11'970	144	5.7%	9.7%		
Greece	2017	66	6	0.3%			
Hungary	2015	30	3	0.3%			
Ireland	2017	206	43	2.5%			
Italy	2019	3'625	60	3.7%	4.0%	667	
Latvia	2017	51	6	1.5%			
Lithuania	2017	51	18	1.0%		5	
Luxembourg	2018					6	
	2019	160	265	8.6%			
Montenegro	2010	0	0				
Netherlands	2019	1'211	71	4.9%	4.1%	330	
Norway	2016			1.7%			
Norway	2019	442	83		4.5%	30	
Poland	2019	314	8	0.6%			
Portugal	2011	21	2	0.2%			
Romania	2016	41	2	0.2%			
Russia	2012						4
	2018	160	1				
Serbia	2015						20
Slovakia	2010	4	1	0.2%			
Slovenia	2009					0	
	2013	49	/27	1.8%			
Spain	2017			2.8%		59	
	2018	2'133	47		12.1%		
Sweden	2018						117
	2019	2'144	215	9.0%	-3.8	519	
Switzerland	2019	2'912	338	10.4%	5.6%		
Turkey	2014	46	1				
Ukraine	2019	36	1				
UK	2019	2'679	40	1.8%	4.8%	112	
Europe		**45'049**	**55.8**		**8%**	**3'175**	**516**
European Union		**41'453**	**84.4**	**3.2%**	**8%**	**3'145**	**493**

Source: FiBL-AMI survey 2021. 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 2019 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 2019 (in hectares)

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317.

Latin America: An Insight into the Latest Developments in Organic Agriculture

PATRICIA FLORES [1]

Latin America is a vast region with more than 20 countries covering over 20 million km², populated by 650 million inhabitants. It is characterised by a high biological and cultural diversity, being the centre of origin of important species for the world's food supply. The diverse bio-cultural assets of the region, from ecosystems, languages, to climates and soils, have generated the various agricultural production systems present across the region, making it an important resource for resilient food systems.

In 2019, Latin America had more than 220'000 organic producers and an organic agricultural area of more than eight million hectares (Re stats chapter), approximately 11 percent of the world's organic area. Argentina, Uruguay and Brazil represent approximately 85 percent of the organic area in the region with 7.1 million hectares; a large part of this area is pasture for organic livestock.

In the last 20 years, the organic agriculture sector has developed especially organised export-oriented family farmers focused on international trade to supply markets in the European Union (EU), United States, Canada and Japan. In the last decade, organic production of coffee, cocoa, tropical fruits (banana, mango), ginger, turmeric and Andean grains stand out, adding value to the raw products. This is especially noteworthy in the industry of fine aroma cacao and chocolate – here the cacao value chain has been developed based on native genetic resources and the organisation of cacao growers giving special attention to the quality of the final product. To the same accord, organic and biodynamic products in the region have seen substantial growth, driven by the demand for these fine products like the Chilean and Argentinian wines, chocolates from Ecuador and bananas from the Dominican Republic, Ecuador and Peru.

The ten largest export countries of organic products to the EU represented 70 percent of EU imports in 2019 (based on import quantity/volume in metric tons). This group of countries includes five Latin American countries: Dominican Republic, Ecuador, Peru, Colombia and Brazil, representing 31 percent of the total imports to the EU, with a positive trend compared with 2018 (European Commission 2020, see page 140).

A focus on Brazil

Brazil is a country with a dynamic organic sector that is very different from the rest of the countries, characterised by a robust domestic organic market, highly developed organic value chains and supportive, conscious consumers.

In June 2019, the Brazilian organic agriculture competent authority COAGRE reported during Biofach Latin America 2019 nearly 69'000 organic producers (including non-

[1] Patricia Flores, IFOAM Latin America Office Coordinator, Lima, Peru

certified producers) and the historical evolution of the three organic quality control mechanisms according to their organic regulation:

- third party certification,
- participatory guarantee systems, and
- social control organisms.[1]

In the six years since introducing organic regulation in Brazil, including Participatory Guarantee Systems (PGS) as a compliance system for organic production, PGS have been the most preferred system by organic producers to supply their markets. PGS have seen a fourfold increase in less than six years, as shown in Table 73.

Table 73: Brazil: Organic producers in Brazil according to the certification system

Guarantee system	2013	2014	2015	2016	2017	2018	2019
Third-party certification	3'276	3'031	4'706	6'542	7'967	7'042	8'279
Participatory Guarantee System	1'456	1'451	3'273	3'698	4'866	4'893	6'241
Social Control Organism	2'379	2'393	3'499	2'560	4'618	5'538	4'777
Total	**9'124**	**8'889**	**13'493**	**14'816**	**19'468**	**19'491**	**21'316**

Source: Virginia Lira, COAGRE. Biofach Latin America, 2019

Brazil has a very comprehensive organic regulation, which includes promotion and control programs. The National Plan for organic production control in Brazil includes social control promoted by the CPOrg-UF (the control unit of the organic product commission), the monitoring program for not-allowed substances in organic production, trade control and the control of production units - among other control mechanisms and audits.

The National Plan for Agroecology and Organic Production (PNAPO) was constructed through major, bottom-up civil society efforts and adopted on August 20, 2012. The plan has a multisectoral and transdisciplinary approach, impressive achievements and respect for the Future Just Lawmaking Principles, and includes elements of agroecology. Brazil's PNAPO was recognised with the 2018 Future Policy Silver Award, which the World Future Council awarded in partnership with the Food and Agriculture Organisation of the United Nations (FAO) and IFOAM – Organics International. Only PNAE, the National Program of Food Meals, continues to prioritise public procurement

[1] Social control in direct selling is a simpler system of control over organic compliance that allows sales only direct sales of goods to the consumer. Sales are usually at fairs, markets, or from the production unit, via direct basket delivery, consumer groups, such as CSAs, and from Public Procurement Programmes, such as the National School Meals Programme (PNAE) or the Food Purchase Programme (PAA). Only family farmers linked to Social Control Organisations duly registered at the Ministry of Agriculture, Livestock and Food Suppy (MAPA) can directly sell organic products without certification. The Social Control Organisations generate credibility in society through interactions with people or organisations, based on trust, participation, commitment, transparency and joint responsibility. The farming families linked to the Social Control Organisations are identified through the Declaration of Registration provided by MAPA. This Declaration must be available in a visible place at the point of marketing or be presented at the time of the sale of products to public programmes and/or the delivery of baskets.

of organic production from family agriculture and provides a better price for organic products. Unfortunately, in the last years, due to a shift in the government agenda, organic public policies to foster and strengthen organic production and agroecology in Brazil, such as PNAPO and the Nuclei of Studies[1], have been seriously affected, diminishing their possibility to continue. The organic movement expects the Brazilian best practice policies to be transformed for more sustainable food systems and a healthy planet.

Memorandum of understanding between Brazil and Chile on organic products

A Memorandum of Understanding signed in September 2018, ratified by high-level national authorities in January 2019, was signed between Brazil and Chile to promote international trade of organic products between the two countries.

The objective of these negotiations is to promote trade between the countries and facilitate access to markets while protecting the organic integrity of the products. Beyond international trade, it seeks to maintain fluid communication and collaboration between the parties, collaborate on control and monitoring and promote the exchange of initiatives and policies to develop organic production.

Chile and Brazil mutually recognise their respective organic product certification systems. Therefore, the products certified with the certification system of the country of origin can be traded. This is the first time in international trade that two Latin America countries established an agreement including PGS (PGS in Brazil and self-certification in Chile). With this agreement, the trade of organic products between the two countries is expected to increase having a significant social impact that could bring economic benefits to organised family farmers.

The Inter-American Commission on Organic Agriculture (CIAO)

The Inter-American Commission for Organic Agriculture (CIAO, acronym in Spanish) is a technical body created in July 2008 by the Ministers of Agriculture through IICA's Executive Committee, to develop the organic sector in the countries of the Americas and facilitate the trade of organic products. CIAO is comprised of the competent authorities for control of organic agriculture. They are responsible for regulating and controlling organic production and guaranteeing the organic integrity of the products. In the last years, CIAO has also included competent authorities for the promotion of organic production. This Commission is the first and only official regional body working on organic, with IICA, the Inter-American Institute for Agricultural Cooperation, which also hosts the Executive Secretariat.

CIAO has 19 member countries: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, El Salvador, Honduras, Guatemala, Mexico, Nicaragua, Panama, Paraguay, Peru, United States, Uruguay and Venezuela. Spain and Portugal

[1] Nuclei of studies are multi-stakeholder study groups "Núcleo de Estudos em Agroecologia e Produção Orgânica "organised per each federal state with universities and research institutes.

participate in the Commission as permanent observers. Currently, the Board of Directors has representatives from Ecuador (chair), Mexico, Bolivia, Brazil and IICA.

On May 12, 2020, the Inter-American Commission on Organic Agriculture (CIAO) and IFOAM - Organics International signed a Memorandum of Understanding to strengthen the collaboration among the parties, especially addressing: a) promotion of organic agriculture, b) improve knowledge and dissemination of organic agriculture, c) encourage activities to foster sustainable development, environmental conservation and organic consumption.

Mexico: News on the national organic regulation

To boost the production of certified organic foods, diversify their supply and encourage more medium and small producers to join the value chain, the Mexican Ministry of Agriculture and Rural Development updated the Guidelines for Organic Operations. This was the result of a very demanding process involving diverse Mexican organic stakeholders, with representatives from farmers' organisations, operators and industry.

The modified regulation published in the Official Journal of the Federation (DOF) on June 8, 2020, establishes standards that were lacking in production systems such as melipona honey, which comes from stingless bees, and aquaculture production. The competent Mexican authority SENASICA is also developing equivalence agreements with its main trade partners, the United States of America, Canada and the EU. The equivalence will allow the free flow of Mexican organic products that hold the National Organic Seal to the world's most competitive markets. Likewise, with the new guidelines, Mexico joins Argentina and Ecuador, as the first three countries of the Inter-American Commission on Organic Agriculture (CIAO), to have regulations for organic aquaculture.

Outlook

The pandemic has put into perspective what is important for human life and health at all levels. Organic farmers in the region have incorporated the Principles of Organic Agriculture: Health, Ecology, Care, and Fairness in their daily practice and systems' innovations. This crisis leads us to reflect on how we interact with the environment and natural resources, how we can address problems, and where organic agriculture could provide options to transform the crisis into something better, with benefits for human health. These include slowing down the destruction of habitats that cause the spread of diseases, reducing vulnerability in future food supply and trade disruptions, reconnecting people to food production and transforming our food systems.

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The Inter-American Commission for Organic Agriculture (CIAO)

GRACIELA LACAZE[1] & JUAN MANUEL GÁMEZ[2]

The Inter-American Commission for Organic Agriculture CIAO[3] is a technical entity created in July 2008 by the Ministers of Agriculture of the Americas via the Executive Committee of the Inter-American Institute for Cooperation on Agriculture (IICA), with the aim of contributing to the development of organic agriculture and organic trade in countries in the Americas.

CIAO comprises the Competent Authorities for Control of Organic Agriculture in the member countries. The authorities are the entities responsible for regulating and controlling activities in the field of organic agriculture and guaranteeing the organic status of products. Their responsibilities include registering and auditing producers, processors, traders, input suppliers, inspectors, and organic certification agencies as well as keeping statistical records for the activities and proposing modifications to organic production standards. The Competent Authorities for the Development of Organic Production are also part of CIAO; they focus on the development and promotion of the organic sector in the member countries.

Currently consisting of 19 member countries[4], CIAO is the first official regional entity to conduct work on organics. It was established by the Inter-American Board of Agriculture, IICA's highest-level governing body. The IICA serves as the Executive Secretariat of CIAO.

The Ministries of Agriculture of the Americas established the following objectives of the CIAO:

- To contribute to the development of organic agriculture in the countries of the Americas and trade in its products as well as serve as a technical body for knowledge management and the sharing and dissemination of appropriate information in a timely manner;
- To contribute to the strengthening of the institutional structures of the Competent Authorities in Organic Agriculture in the countries of the Americas;

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[1] Graciela Lacaze, Inter-American Commission for Organic Agriculture CIAO, CIAO Executive Secretariat, Buenos Aires, Argentina, www.ciaorganico.net and www.iica.int

[2] Juan Manuel Gámez, Inter-American Commission for Organic Agriculture CIAO, CIAO Executive Secretariat, Buenos Aires, Argentina, www.ciaorganico.net and www.iica.int

[3] CIAO is the acronym of the Inter-American Commission for Organic Agriculture .in Spanish.

[4] Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, United State, Honduras, Guatemala, Mexico, Nicaragua, Panama, Paraguay, Peru, the Dominican Republic, Uruguay, the United States and Venezuela. Spain and Portugal participate in the Commission as permanent Observer Members. The countries that comprise the Board of Directors of CIAO are Ecuador (president), Mexico, Bolivia, Brazil and the Inter-American Institute for Cooperation on Agriculture (IICA).

- To coordinate and promote the development and harmonization of standards and procedures with the aim to stimulate and regulate the production and control of and trade in organic foods in the countries of the Americas;
- To serve as a mechanism for consultation, liaison and reciprocal cooperation with the competent governmental bodies that promote and establish standards for the development and control of organic agriculture in each country of the Americas;
- Within the framework of other functions that contribute to the development of organic agriculture, to sponsor, insofar as possible, the development of organic agriculture and its institutional framework.

CIAO's work focuses on four strategic areas, through which it provides technical cooperation to contribute to the comprehensive development of organic production:

Facilitation of trade in organic products and the development of organic markets, including harmonizing standards among countries; creating standards for organic production matters that are not yet standardized; assisting countries in processes to enable their standards and control systems to be recognized and validated by their commercial partners and assisting countries in defining strategies to develop socially-inclusive organic markets that include producers and consumers.

Establishment and strengthening of National Control Systems (NCS) for Organic Production, which includes developing methodological instruments to strengthen the NCS, including: creating proposals to strengthen the NCS in the countries and monitoring their implementation and supporting the establishment of institutional frameworks for organic production in countries where they do not exist.

Promotion of organic agriculture, which includes developing methodological instruments to promote organic production; creating proposals for policies and agendas that promote organic production; and supporting the establishment of institutional frameworks needed to promote organic production in the countries of the Americas.

Knowledge management, covering stakeholder access to information of interest, to support and improve decision-making processes and disseminating relevant information among stakeholders involved in organic production.

Since 2019, CIAO and the Research Institute of Organic Agriculture FiBL have been working together on the collection of statistical data on organic production. Both CIAO and FiBL carry out regular data collection on area, land use and operators on organic agriculture, operating in different but complementary contexts. CIAO recognizes that there are many benefits to open and transparent collaboration, which has made it possible to improve data collection, increase information flows and arrive at higher quality results on organic production in the Americas and the world.

Latin America and the Caribbean: Current statistics

Claudia Meier,[1] Bernhard Schlatter,[2] Olivia Keller[3] and Jan Trávníček[4]

Overview

In 2019, nearly 8.3 million hectares were reported as being under organic production in Latin America and the Caribbean (a total of 44 countries). This corresponded to 1.2 percent of the total agricultural land in that region (Table 74). Hence, of the organic agricultural land worldwide, 11 percent were recorded in Latin America and the Caribbean. Compared to 2018, the organic agricultural area in that region grew by nearly 284'000 hectares. Since 2000 the area more than doubled (an increase of almost 4.4 million hectares) (Figure 95). Since 2001, the countries with the largest organic agricultural area are Argentina, Uruguay, and Brazil. From 2018 to 2019 the organic agricultural area in Argentina grew by 1 percent, reaching nearly 3.7 million hectares, in Uruguay, it decreased by 0.2 percent but remained at over 2.1 million hectares, and in Brazil it increased by 8 percent, reaching nearly 1.3 million hectares (Figure 93). The countries with the highest organic share in 2019 were Uruguay with 15.3 percent (highest share since 2014), French Guiana with 11.3 percent, and the Dominican Republic with 5.5 percent (Figure 94).

Land use

In 2019, land use details were available for 84 percent of the organic agricultural land in Latin America and the Caribbean. Only 5 percent of all organic farmland was utilized for arable crops (almost 441'000 hectares); while 71 percent was used for permanent grassland/grazing areas (nearly 5.9 million hectares). Permanent crops were grown on more than 643'000 hectares (8 percent of the organic area in the region), and for 16 percent of the reported area, no details were available (over 1.3 million hectares) (Figure 96, Table 76). The countries with the largest organic permanent grassland/grazing areas were Argentina (nearly 3.4 million hectares) and Uruguay (over 2.1 million hectares). The largest area of organic arable crops was in Bolivia (nearly 135'000 hectares), followed by Peru (over 96'000 hectares), and Mexico (over 72'000 hectares). The largest area of organic permanent crops was in Peru (over 138'000 hectares), followed by the Dominican Republic (over 115'000 hectares), and Mexico (nearly 107'000 hectares).

Since 2010, cereals are the key organic arable crops in Latin America and the Caribbean with nearly 164'000 hectares in 2019 (37 percent of organic arable land). Sugarcane is among the three most important organic arable crops since 2005 (except for 2012), reaching over 77'000 hectares in 2019 (18 percent of organic arable land). Organic

[1] Claudia Meier, 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] Olivia Keller, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[4] Jan Trávníček, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

oilseeds have been gaining importance, reaching nearly 61'000 hectares in 2019 (14 percent of organic arable land) (Figure 96, Table 76). In 2019, organic cereals represented 0.3 percent of the total cereal area in the region and 3 percent of the world's organic cereal area. The key organic cereal in the region was quinoa (over 117'000 hectares) representing 66 percent of all the quinoa grown in the region and close to 100 percent of the world's organic quinoa area. The key country producing quinoa was Bolivia with over 106'000 hectares. Organic sugarcane represented 0.6 percent of the total sugarcane area in the region and 87 percent of the world's organic sugarcane area. Key producing countries were Paraguay (over 32'000 hectares) and Argentina (almost 20'000 hectares). Organic oilseeds represented 0.1 percent of the total oilseeds area in the region and 4 percent of the world's organic oilseeds area. The key organic oilseed in the region was sesame (over 16'000 hectares) representing 6 percent of all the sesame grown in the region and 11 percent of the world's organic sesame area. The key country producing organic sesame was Bolivia with nearly 4'000 hectares.

As in previous years, coffee, cocoa, and tropical fruit were the three most important organic permanent crops in the region in 2019. Organic coffee reached over 268'000 hectares (42 percent of organic permanent crop area), organic cocoa over 146'000 hectares (23 percent of organic permanent crop area), and organic tropical fruit nearly 76'000 hectares (12 percent of organic permanent crop area) (Figure 96, Table 76). Organic coffee represented 5 percent of the total coffee area in the region and 38 percent of the world's organic coffee area. The countries with the largest organic coffee areas were Peru (nearly 103'000 hectares), Mexico (nearly 73'000 hectares), and Nicaragua (over 31'000 hectares). Organic cocoa represented 8 percent of the total cocoa area in the region and 40 percent of the world's organic cocoa area. The countries with the largest organic cocoa areas were the Dominican Republic (almost 90'000 hectares) and Peru (over 25'000 hectares). Organic tropical fruit represented 2 percent of the total tropical fruit area in the region and 35 percent of the world's organic tropical fruit area. The key tropical fruit in Latin America and the Caribbean are bananas (nearly 57'000 hectares in 2019). In 2019, organic bananas represented 3 percent of the total bananas area in the region and 90 percent of the world's organic bananas area. The countries with the largest bananas area are the Dominican Republic (over 25'000 hectares) and Ecuador (nearly 17'000 hectares); these two countries represent 74 percent of the regional organic banana area.

Producers

Over 224'000 organic producers were recorded in Latin America and the Caribbean in 2019. The countries with the most organic producers were Peru (nearly 81'000), Mexico (nearly 37'000), and Brazil (over 22'000) (Table 74). However, it is important to note that the number of producers largely depends on the type of operators reported by the country. Some countries only report the number of farm enterprises/companies, whereas others also report the number of smallholders.

Wild collection

In Latin America and the Caribbean, organic wild collection plays an important role. In 2019, there were nearly 4.6 million hectares of organic wild collection areas. They are mainly used for the collection of wild nuts (over 3.2 million hectares), wild berries (over 161'000 hectares), and palmito (more than 60'000 hectares) (Table 77). The countries with the largest organic wild collection areas were Brazil (over 1.7 million hectares, mainly wild brazil nuts), Bolivia (almost 1.5 million hectares, mainly wild brazil nuts), Mexico (almost 953'000 hectares, no details available), and Peru (almost 159'000 hectares, of wild collection areas, mainly brazil nuts). 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 279.

Organic Agriculture in Latin America and Caribbean: Graphs

Latin America and Caribbean: The ten countries with the largest organic area 2019
Source: FiBL survey 2021

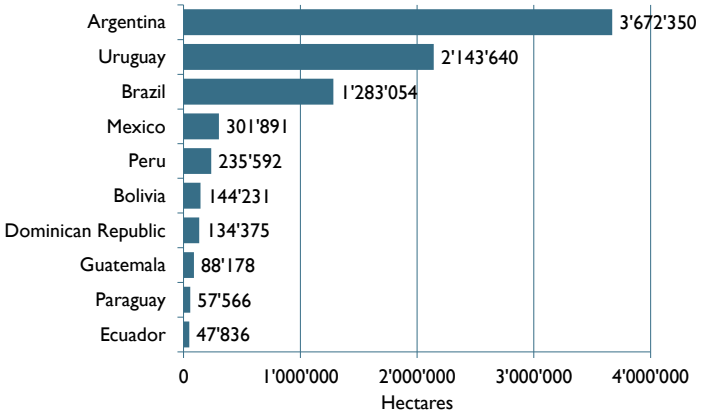

Figure 93: Latin America and Caribbean: The ten countries with the largest areas of organic agricultural land 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Latin America and Caribbean: The countries with the highest organic share of total agricultural land 2019
Source: FiBL survey 2021

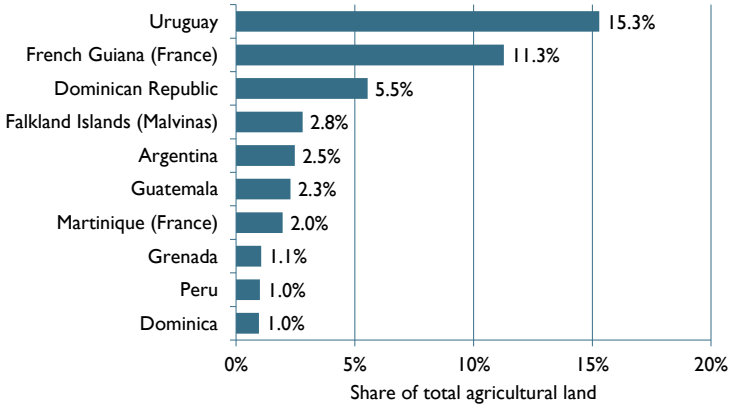

Figure 94: Latin America and Caribbean: The ten countries with the highest organic share of total agricultural land 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Latin America and Caribbean: Development of organic agricultural land 1999 to 2019
Source: FiBL-IFOAM-SOEL-Surveys 2002-2021

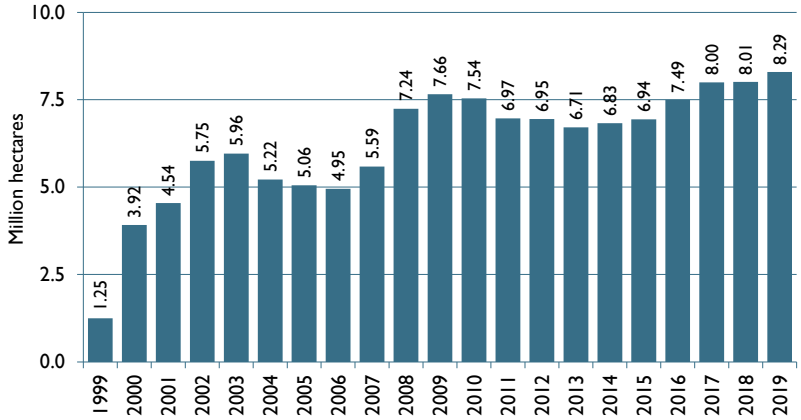

Figure 95: Latin America and Caribbean: Development of organic agricultural land 1999-2019

Source: FiBL-IFOAM-SOEL surveys 2001-2021

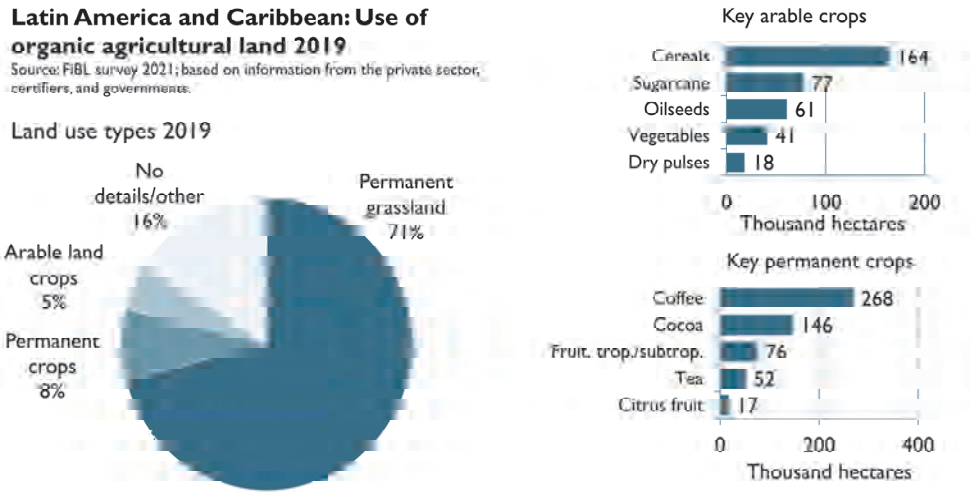

Figure 96: Latin America and Caribbean: Use of agricultural organic land 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Organic Agriculture in Latin America and Caribbean: Tables

Table 74: Latin America: Organic agricultural land, organic share of total agricultural land, and number of producers 2019

Country	Area [ha]	Organic share [%]	Producers [no.]
Argentina	3'672'350	2.5%	1'269
Bahamas	49	0.3%	1
Belize	77	0.0%	157
Bolivia	144'231	0.4%	14'161
Brazil	1'283'054	0.5%	22'191
Chile	20'897	0.1%	781
Colombia	30'447	0.1%	4'155
Costa Rica	8'832	0.5%	54
Cuba	2'373	0.0%	9
Dominica	240	1.0%	
Dominican Republic	134'375	5.5%	16'311
Ecuador	47'836	0.9%	13'744
El Salvador	1'708	0.1%	380
Falkland Islands (Malvinas)	31'937	2.8%	3
French Guiana (France)	3'667	11.3%	84
Grenada	84	1.1%	23
Guadeloupe (France)	492	1.0%	103
Guatemala	88'178	2.3%	6'346
Haiti	3'333	0.2%	4'633
Honduras	29'274	0.9%	6'023
Jamaica	374	0.1%	127
Martinique (France)	612	2.0%	80
Mexico	301'891	0.3%	36'587
Nicaragua	42'952	0.8%	10'448
Panama	5'929	0.3%	18
Paraguay	57'566	0.3%	5'122
Peru	235'592	1.0%	80'785
Puerto Rico	14	0.0%	5
Suriname	109	0.1%	39
US Virgin Islands	26	0.7%	
Uruguay	2'143'640	15.3%	748
Total*	8'292'138	1.2%	224'387

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317
**Total number includes data for countries with less than three operators.*

Table 75: Latin America: All organic areas 2019

Country	Agriculture [ha]	Aquaculture [ha]	Forest [ha]	Other non agri. land [ha]	Wild collection [ha]	Total [ha]
Argentina	3'672'350				20'900	3'693'250
Bahamas	49					49
Belize	77					77
Bolivia	144'231				1'455'835	1'600'066
Brazil	1'283'054				1'701'438	2'984'492
Chile	20'897	489			93'079	114'465
Colombia	30'447			23'090	7'320	60'858
Costa Rica	8'832					8'832
Cuba	2'373					2'373
Dominica	240					240
Dominican Republic	134'375					134'375
Ecuador	47'836	79	40'007		1'000	88'921
El Salvador	1'708					1'708
Falkland Islands (Malvinas)	31'937					31'937
French Guiana (France)	3'667					3'667
Grenada	84					84
Guadeloupe (France)	492					492
Guatemala	88'178				147'234	235'412
Guyana					55'449	55'449
Haiti	3'333					3'333
Honduras	29'274					29'274
Jamaica	374				36	410
Martinique (France)	612					612
Mexico	301'891				952'755	1'254'646
Nicaragua	42'952				93	43'045
Panama	5'929					5'929
Paraguay	57'565					57'565
Peru	235'592			2'750	158'560	396'902
Puerto Rico	14					14
Suriname	109					109
US Virgin Islands	26					26
Uruguay	2'143'640					2'143'640
Total	**8'292'138**	**568**	**40'007**	**25'840**	**4'593'699**	**12'952'253**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Table 76: Latin America: Land use in organic agriculture 2019

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		1'306'770
Arable land crops	Cereals	163'769
	Dry pulses	18'016
	Fallow land, crop rotation	41'887
	Fresh vegetables and melons	41'050
	Industrial crops	2'628,9
	Medicinal and aromatic plants	5'403
	Oilseeds	60'805
	Plants harvested green	6'619
	Root crops	4'188
	Strawberries	107
	Sugarcane	77'399
	Textile crops	1'643
	Tobacco	47
	Arable crops, other	17'127
Arable land crops total		440'691
Cropland, no details		4'649
Other agricultural land		7'299
Permanent crops	Berries	12'153
	Citrus fruit	16'857
	Cocoa	146'114
	Coconut	552
	Coffee	268'418
	Fruit, temperate	8'284
	Fruit, tropical and subtropical	75'513
	Fruit/nuts/berries	2
	Grapes	13'612
	Medicinal and aromatic plants, permanent	13'859
	Nuts	6'058
	Olives	6'591
	Tea/mate, etc.	51'662
	Permanent crops, other	23'454
Permanent crops total		643'129
Permanent grassland		5'889'601
Total		**8'292'138**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Table 77: Latin America: Use of wild collection areas 2019

Land use	Area [ha]
Berries, wild	161'352
Forest products	2'000
Fruit, wild	7'581
Medicinal and aromatic plants, wild	94
Nuts, wild	3'239'151
Palmito, wild	60'249
Seaweed	800
Wild collection, no details	1'122'472
Total	**4'593'699**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

North America

Map 6: Organic agricultural land in Canada and the United States 2019

Source: Canada Organic Trade Association (COTA) and United States Department of Agriculture (USDA). For detailed data sources see annex, page 317.

US Organic Sales Break Through 55 Billion Dollar Mark

Barbara Fitch Haumann[1]

The US organic sector posted another banner year in 2019, with sales reaching 55.1 billion US dollars,[2] up five percent from 2018. According to the Organic Trade Association's *2020 Organic Industry Survey*, both organic food and non-food markets shattered major benchmarks.

Organic food sales hit 50.1 billion US dollars,[3] up 4.6 percent. Organic non-food sales totalled just over 5 billion US dollars,[4] up 9.2 percent. Both easily outpaced the general market growth rate of around 2 percent for total food sales and 3 percent for total non-food sales.

Organic fruit and vegetable sales in 2019 were up nearly five percent, hitting 18 billion US dollars[5], as the category continued to be the star of the sector. Organic produce made up almost a third of all organic food sales, and organic fruits and vegetables, including fresh, frozen, canned, and dried, captured 15 percent of the fruit and vegetable market in the US.

Although 2020 numbers are not yet available, the COVID-19 pandemic has had dramatic consequences for the organic sector. As shoppers searched for healthy, clean food to feed their families, organic proved to be the food of choice for home consumption. Demand for organic fresh produce grew substantially from March onward as consumers continued at-home eating in the face of restaurant closures. In fact, the Organic Produce Network predicted double-digit growth of fresh produce sales in its analysis during the year. Fresh fruit and vegetable sales averaged 18 percent year-over-year growth in each of the first three quarters.

Slower growth categories suddenly experienced outrageous demand. Sales of organic shelf-stable baking mixes and flours were up 46 percent during the summer months, according to SPINS, while organic frozen foods were up 24 percent. For context, organic baking needs grew at 6.9 percent during 2019, while organic frozen food had been nearly stagnant at 7 percent growth.

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[1] Barbara Fitch Haumann is Senior Writer/Editor for the Organic Trade Association headquartered in Washington, D.C., USA.
[2] 55.1 billion US dollars corresponded to 49.2 billion euros (based on 2019 average exchange rate according to the European Central Bank).
[3] 50.1 billion US dollars corresponded to 49.2 billion euros (based on 2019 average exchange rate according to the European Central Bank).
[4] 5 billion US dollars corresponded 4.5 billion euros (based on 2019 average exchange rate according to the European Central Bank).
[5] 18 billion US dollars corresponded 16.1 billion euros (based on 2019 average exchange rate according to the European Central Bank).

Despite challenging conditions, those in the organic supply chain adapted their practices to keep pantries and refrigerators stocked, and supported their communities through donations, shifting business models to produce essential supplies, retooling work processes to protect employees, enhancing employee benefits, and taking creative measures to meet demand.

More farmers growing organic

Meanwhile, the U.S. Department of Agriculture's (USDA's) National Agricultural Statistics Service (NASS) in October released its 2019 Organic Survey, counting 16'585 certified organic farms, up 17 percent from 14′271 in 2016. These operations represented 5.50 million certified acres (2.2 million hectares), an increase of 9 percent over 2016 figures.

Total U.S. farm gate sales reached 9.93 billion U.S. dollars[1] in organic products, an increase of 2.37 billion U.S. dollars, or 31 percent, over those in the 2016 NASS survey. California continued to lead the nation in certified organic farm gate sales, followed by Washington, Pennsylvania, Oregon, and Texas.

Nearly 3′000 organic farms reported they directly market to consumers via such methods as farm stands and farmers' markets. Meanwhile, approximately 3′200 farms sell directly to retail markets, while over 1′300 sell value-added products such as wine, jams and cheeses.

In addition, 1′857 farms are transitioning 255′060 acres (103′263 hectares) to certified organic production, while 710 farms say they are not yet certified but are transitioning approximately 60′600 acres (24′534 hectares).

Global trade

The U.S. international organic program overseen by the Organic Trade Association and funded through USDA yielded 16.7 million U.S. dollars[2] in projected sales in 2020 from two trade shows and included Natural Products Expo West meetings and virtual trade events. There were 31 companies participating across activities taking place in Europe, Asia, and the UAE. In addition, the program undertook new consumer promotion efforts in Japan, South Korea and the United Arab Emirates (UAE).

Pre-pandemic, 14 companies exhibited in the program's booth at Biofach in Germany, featuring grains and flours, to functional beverages, nuts, and baby food. The Organic Trade Association also participated in the Biofach Congress, presenting in six panels and seminars and furthering ties with European partners. The program also exhibited at Gulfood, Dubai, UAE, for the first time, with food ingredients and organic snack foods demonstrating strong market potential. As the world began shutting down due to COVID-19, the program's Expo West effort was able to arrange a few meetings

[1] 9.93 billion US dollars corresponded 8.9 billion euros (based on 2019 average exchange rate according to the European Central Bank).
[2] 16.7 million US dollars corresponded 14.9 billion euros (based on 2019 average exchange rate according to the European Central Bank).

between buyers and local suppliers to generate overseas business for organic exporters in Asia.

During the pandemic, the program held two virtual trade missions in September: one on produce with buyers from across Asia, and a second for processed product companies with buyers from Asia, Europe, and the UAE. More than 100 one-on-one virtual meetings took place, with over 2.1 million U.S. dollars[1] in projected sales – a huge success for a first-time virtual event, with 17 U.S. supplier companies and 15 foreign buyers.

Organic fraud prevention

During 2020, U.S. organic businesses gained access to the Organic Trade Association's ground-breaking Organic Fraud Prevention Solutions and a fraud-fighting training package from USDA.

Designed to meet the unique needs of the organic supply chain, Organic Fraud Prevention Solutions is based on buyer responsibility and supplier verification. Participating companies receive a comprehensive Organic Fraud Prevention Guide and take an online training course, 'Developing and Implementing an Organic Fraud Prevention Plan.'

USDA has added two free online courses: 'Preventing the Organic Fraud Opportunity' and 'Organic Fraud and the Criminal Mind.' Both are offered through its Organic Integrity Learning Center and are designed for organic inspectors and certifiers to complement the trade association's fraud-fighting program. The courses were made possible by a cooperative agreement between the trade association and USDA.

Strengthening enforcement

In 2020, USDA's National Organic Program (NOP) published its Strengthening Organic Enforcement and Oversight proposed rule to support the continued growth of the organic market and improve oversight at critical links in the supply chain. It is designed to close gaps in current regulations to build consistent certification practices to deter and detect organic fraud, improve transparency and traceability of organic products throughout the supply chain, and protect organic integrity.

It's the largest single piece of rulemaking since the U.S. organic standards went into effect in 2002. 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.

Among other provisions, certified operators would be required to maintain a fraud prevention plan. The Organic Trade Association's Organic Fraud Prevention Solutions is a private sector initiative that addresses this need.

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[1] 2.1 million US dollars corresponded 1.9 billion euros (based on 2019 average exchange rate according to the European Central Bank).

USDA estimates that at least 1′922 U.S. handlers will need to get certified, and the rule will impact 26′408 certified operations in the U.S, 18′352 in foreign countries and 2.6 million growers. The focus now is to move swiftly to a final rule--hopefully in the first half of 2021--and provide support and resources to ensure successful implementation.

Meanwhile, the sector continues to push for animal welfare standards via a lawsuit led by the Organic Trade Association and through advocacy for a final rule on Origin of Livestock.

Animal welfare: 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. 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 lawsuit against USDA was filed in 2017. 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 2020, the court granted the trade association's request to issue a stay to revise the timetable for future filings until the Biden administration was in place. The new timetable allows for filings to resume between February and May 2021.

Origin of Livestock: Meanwhile, the U.S. organic community has long advocated for a final rulemaking on Origin of Livestock to clarify and narrow the allowance to transition dairy animals into organic milk production as a one-time event. In 2015, a proposed Origin of Livestock rule was released clarifying that producers may transition non-organic dairy animals to organic milk production only when converting a conventional herd to organic. Once the transition is complete, the producer is not allowed to transition any additional animals to organic production. All dairy animals added to the operation must be under organic management from the last third of gestation, or transitioned dairy animals sourced from another certified organic dairy farm.

USDA in October 2019 re-opened comments on the proposal. Despite overwhelming consensus and support for the proposed rule, USDA still has not released a final rule despite the congressional Fiscal Year 2020 Appropriations Bill mandating that the agency release a final rule by June 30, 2020.

More recently, NOP announced in October 2020 that it intends to rewrite and publish another proposed rule instead of moving to a final rule. This is opposed by the Organic Trade Association, which points out that USDA's inaction to resolve the long-standing inconsistency in certifier enforcement of origin of livestock regulations is exacerbating the economic disadvantage of dairy farmers on an uneven playing field and threatening the integrity of the organic sector.

Looking ahead

The U.S. organic sector has numerous priorities going forward. At the top is for organic to have a seat at the table in climate change discussions.

During 2020, the Organic Trade Association's Board of Directors established a climate task force to develop principles to guide organic's engagement in climate policy discussions. At the trade association's annual meeting in June, its Board unanimously endorsed ten principles for climate policy.

On the regulatory front, organic stakeholders are eager for the resolution of reinstating the Organic Livestock and Poultry Practices rule (OLPP), and still seek the publication of a final rule on Origin of Livestock.

The organic sector also is asking for an interim final rule that encompasses the backlog of standards that have been recommended yet not acted on by USDA during more than a decade. In addition, it is awaiting a new framework for standards development through the advancement of the Strengthening Organic Enforcement and Enforcement rule.

Moreover, with the change in governmental administrations, it is calling for the restoration of an Organic and Sustainable Agriculture Policy Advisor role within USDA, along with steps to promote organic agriculture within USDA research programs and integrate organic into federal nutrition and procurement programs. Another priority is to restore full governmental funding for organic certification cost-share.

Meanwhile, the trade association is undertaking an Organic for All: Diversity and Entrepreneurship goal to foster diversity and inclusion. This campaign will encourage organic entrepreneurs and businesses owned by Black, Indigenous and People of Color, and assess the value of establishing an industry foundation focusing on diversity and entrepreneurship within the organic movement.

In U.S. grocery stores, it is possible to purchase organic food products in nearly every category, while organic products are in the kitchens of more than 82% of American households. But this trust comes as a result of consumers' belief in the veracity of the USDA Organic seal. Strong standards reinforce trust that products bearing the USDA Organic label are held to a high quality, definable, measurable set of standards with robust oversight and enforcement. The integrity of the organic certification process from farm to table is the lifeblood of the organic industry. This will remain the priority for the U.S. organic sector as it continues its advocacy for organic agriculture.

References

Organic Trade Association's 2020 Organic Industry Survey

Organic Trade Association, Organic Fraud Prevention Solutions (https://ota.com/OrganicFraudPrevention

USDA's National Agricultural Statistics Service 2019 Organic Survey, October 2020 (www.nass.usda.gov/organics)

USDA's Agricultural Marketing Service (https://www.ams.usda.gov/rules-regulations/strengthening-organic-enforcement-proposed-rule)

Canada

TIA LOFTSGARD[1]

Ramping up global trade

2019 was a successful year for international organic programs overseen by the Canada Organic Trade Association and funded through Agriculture and Agri-Food Canada, with ten international activities in six countries. Overall, 45 US companies participated in international trade shows and trade missions. In 2019 alone, projected organic export sales from international activities with the trade association were over 15 million Canadian dollars (approx. 10 million euros). These activities are crucial to opening and maintaining market access for Canadian organic products across the globe. Activities took place in Asia, Europe, Latin America, and North America, with an increase in demand for organic crops and cereals, snacks, nuts, and pre-packed meals.

Significant increase in certified organic farms and processors

The Canadian organic sector continues to attract an important number of new farms each year, despite a stiff decline in the number of non-organic farms between 2011 and 2016 (2016 Census of Agriculture). In 2019, there were 7432 certified operations, an increase of 5 percent from the previous year and 48 percent growth since 2015. This continuous year-to-year growth is an indicator of increased consumer demand for organics. In 2019, the total of certified organic producers reached 5677, an increase of 4 percent from 2018 and 43 percent since 2015. Organic acreage increased from 3.3 to 3.4 million acres (1.3 to 1.4 million hectares, including wild collection) between 2018 and 2019, achieving an organic share of 2.2 percent of total agricultural land in Canada.

According to the data, the number of organic food processors/handlers and manufacturing companies in Canada slightly decreased from 1717 to 1710 between 2018 and 2019. However, it increased by 11 percent between 2015 and 2019. The estimated sales value of organic processed food and beverage was 3.21 billion Canadian dollars in 2020, an increase of 9 percent since 2019. In line with this impressive growth in demand for organic processed products, COTA published in September 2019 its report on Organic Food Processing in Canada based on data collected in 2018 and previous years. According to this research report, the number of processed organic food and beverage products introduced to the Canadian market has been escalating in recent years, with 93 percent of surveyed respondents reporting year-over-year sales growth over 5 percent, while 13 percent reported growth over 50 percent.

Market Growth

New records were made in both the organic food market and organic non-food market. Canada's food and non-food organic market is estimated to have reached 6.93 billion Canadian dollars (approx. 4.7 billion euros) in 2020, with a compound annual growth

[1] Tia Loftsgard, Executive Director, Canada Organic Trade Association (COTA), Ottawa, Canada, https://www.canada-organic.ca/

rate of 8.7 percent. The market share of organic food and beverages sold through mainstream retailers has grown from 2.6 percent to 3.2 percent in 2019. While the tracking of international trade is limited to Canada's Harmonized Sales codes and has a limited scope, trade continues to increase. Canadian exports of certified organic products reached 460.9 million Canadian dollars (310 million euros) in 2019, while imports reached 789 million Canadian dollars (approximately 531million euros) in the same year.

Canadian Organic Labour

According to the 2016 Census of Agriculture, 2.35 percent of the total labour force works in organic, compared to 2 percent in 2011. Thirty-one percent of the organic labour force was female, a decrease compared to 34 percent in 2011. The 2016 census identified important labour needs, mainly that organic farmers rely a lot on family labour (58 percent compared to 41 percent in conventional farming), while still needing twice the amount of external labour sources (3.09 employees per farm versus 1 in conventional farming). 2016 data also shows that organic farms earn 11 percent more than the average income, a significant increase from 4 percent in 2011.

State of Organic Performance Report

In 2019, COTA published its third State of Organic Performance Report that outlines the most current forms of support for the organic sector from Federal, Provincial and Territorial jurisdictions and provides a broad set of summary recommendations to each level of government. According to the report, there has been little progress in terms of support from provincial, territorial and Federal governments. While there is great consumer confidence in the Canada Organic Regime, and recognition is growing for the Canadian Organic Logo, the lack of comprehensive programming assistance at the provincial/territorial level leaves a patchwork of provincial responses in the application of a standard for intra-provincial trade. There is also a need for the federal government to provide more robust and comprehensive data on production, imports, exports and consumption, which are paramount for good decision making on government objectives related to climate change. The Canada Organic Trade Association will continue its efforts to work with Agriculture and Agri-Food Canada's 2020 Organic Industry Engagement strategy to move the needle on a federal strategy that incorporates organic agriculture and trade.

References

– Canada Organic Trade Association publications: https://canada-organic.myshopify.com/collections
– Statistics Canada: https://www.statcan.gc.ca/eng/start

North America: Current statistics

Claudia Meier,[1] Bernhard Schlatter,[2] Olivia Keller[3] and Jan Trávníček[4]

Overview

North America's organic agricultural land was 3.6 million hectares in 2019, which is 0.8 percent of the total agricultural area in the region. The area under organic cultivation has more than tripled from the million hectares in 2000, and now represents 5 percent of the global organic agricultural land. Between 2018 and 2019, the area increased by almost 305'000 hectares or 9 percent. In 2019, over 2.0 percent of the farmland in Canada was organic, and the proportion in the United States is 0.6 percent. There was a total of 22'153 producers in North America; most of them in the United States (74 percent).

Land use

Land use details were available for 84 percent of the organic agricultural land. In 2019, only 2 percent of all organic farmland was utilized for permanent crops (over 84'000 hectares) while 36 percent was used to grow arable crops (over 1.3 million hectares), and 46 percent (nearly 1.7 million hectares) was grassland/grazing area. The United States had over 812'000 hectares of organic grassland/grazing area, and Canada reported almost 858'000 hectares.

The key organic arable crop group was cereals, with more than 582'000 hectares, representing 0.8 percent of the total organic cereal area in the region, and 11 percent of the world's organic cereal area. In the United States, over 290'000 hectares of organic cereals were grown, and Canada reported 292´000 hectares. The key organic cereal in the region was wheat (more than 219´000 hectares), this represented 0.8 percent of the total wheat grown in the region. Other important organic arable crops in North America were green fodder, with over 353'000 hectares, oilseeds, with almost 138'000 hectares, and dry pulses, with almost 105'000 hectares.

The main organic permanent crops were grapes (over 27'000 hectares), temperate fruits (over 19'000 hectares), and berries (almost 17´000 hectares). Organic temperate fruits represented 7 percent of the total temperate fruit area in the region. The key organic temperate fruits were apples, pears, and peaches. The key organic berries were blueberries (almost 13'000 hectares, 16.8 percent of the total blueberries grown in the region), and cranberries (over 2'000 hectares, 9.6 percent of the region's cranberries).

[1] Claudia Meier, 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] Olivia Keller, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[4] Jan Trávníček, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

Producers

In 2019, 22’153 organic producers were reported in North America. The United States was the country with the most organic producers, over 16'000, and Canada reported almost 5’700 organic producers. Since 2004, when there were over 11’000 organic producers, the number almost doubled.

Wild collection

In 2019, the United States reported almost 600 hectares of organic wild blueberries. Unfortunately, there was no more data on organic wild collection for the United States. Canada reported over 24’000 hectares of organic wild collection in 2019, with no details.

Market

In 2019, the organic market continued to grow in North America, reaching over 48.2 billion euros. Since 2018, Canada’s organic market grew by almost 12 percent, and the organic market of the United States grew by 10 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 136 euros per capita on organic products in 2019, while in Canada, the per capita consumption was almost 93 euros. For 2019, Canada reported an organic share of the total retail sales of 3 percent, and in the United States, an organic share 6 percent was noted.

For more information about the North American figures, see data tables, page 291.

Organic Agriculture in North America: Graphs

North America: Organic agriculture area 2019
Source: COTA and USDA, 2021

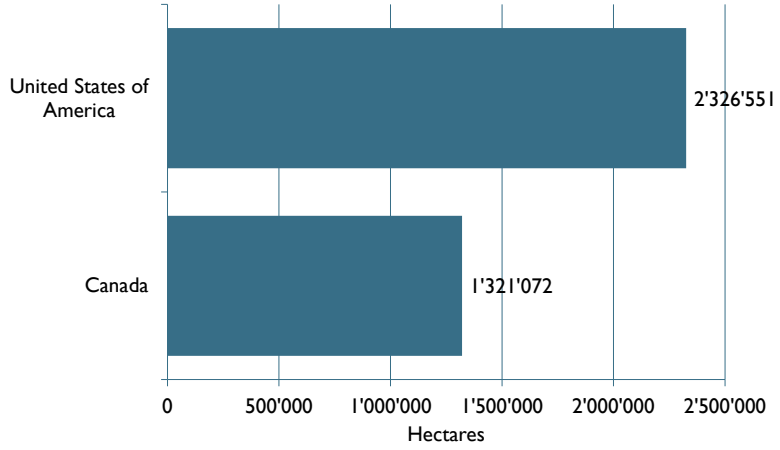


Figure 97: North America: Organic agricultural land in Canada and the United States 2019

Source: Canada Organic Trade Association and United States Department of Agriculture.

North America: Organic share of total agricultural land 2019
Source: COTA and USDA, 2021

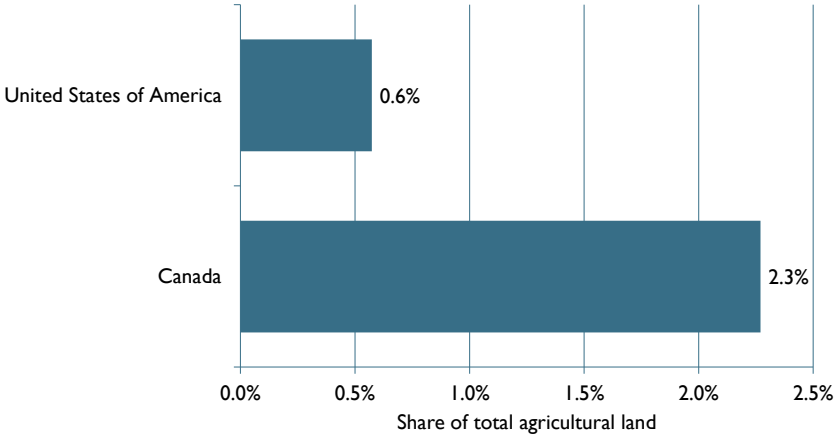


Figure 98: North America: Organic share of total agricultural land in Canada and the United States 2019

Source: Canada Organic Trade Association and United States Department of Agriculture.

North America: Development of organic agricultural land 1999-2019
Source: COG-COTA and USDA, 2000-2021

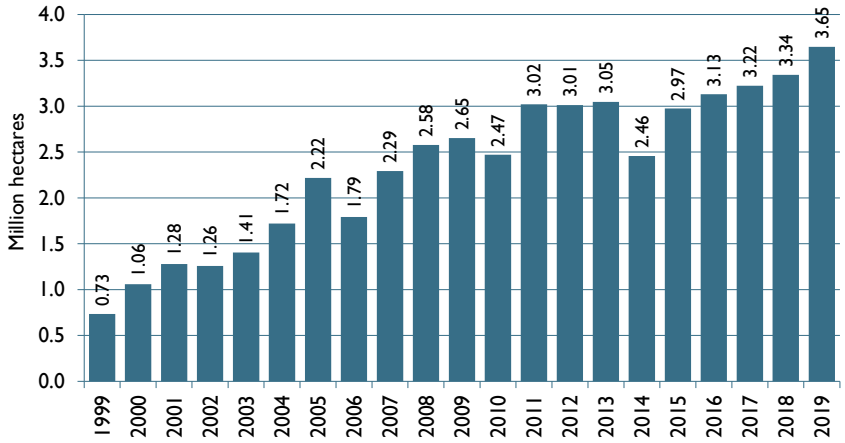


Figure 99: North America: Development of organic agricultural land 1999-2019

Source: Canada Organic Trade Association and United States Department of Agriculture[1]

North America: Use of organic agricultural land 2019
Source: FiBL survey 2021; based on information from the private sector, certifiers, and governments.

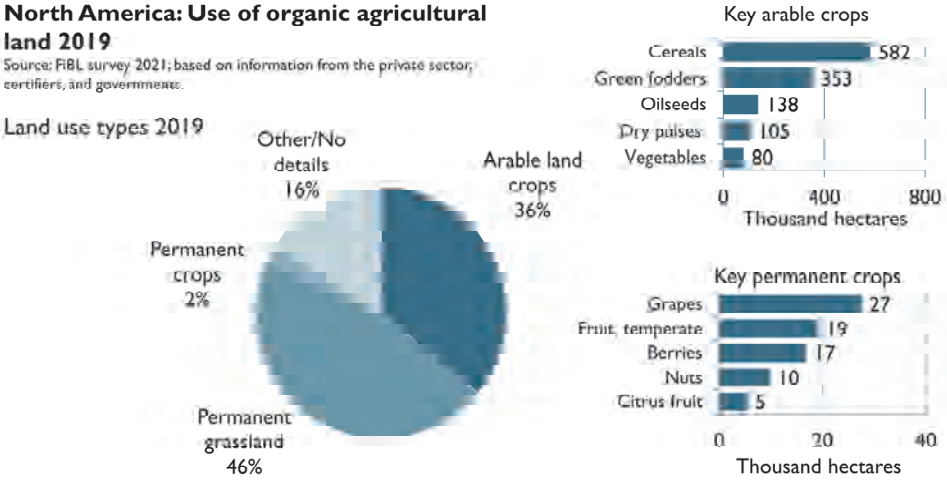


Figure 100: North America: Land use in organic agriculture 2019

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 78: North America: Organic agricultural land, organic share of total agricultural land, and number of producers 2019

Country	Area [ha]	Share of total agri. land [%]	Producer [no.]
Bermuda		Processing	
Canada	1'321'072	2.3%	5'677
United States of America	2'326'551	0.6%	16'476
Total	**3'647'623**	**0.8%**	**22'153**

Source: Canada Organic Trade Association and United States Department of Agriculture; FiBL survey 2021

Table 79: North America: All organic areas 2019

Country	Agriculture [ha]	Forest [ha]	Wild collection [ha]	Total [ha]
Bermuda		Processing		
Canada	1'321'072		24'119	1'345'191
United States of America	2'326'551	205'196	596	2'532'342
Total	**3'647'623**	**205'196**	**24'714**	**3'877'533**

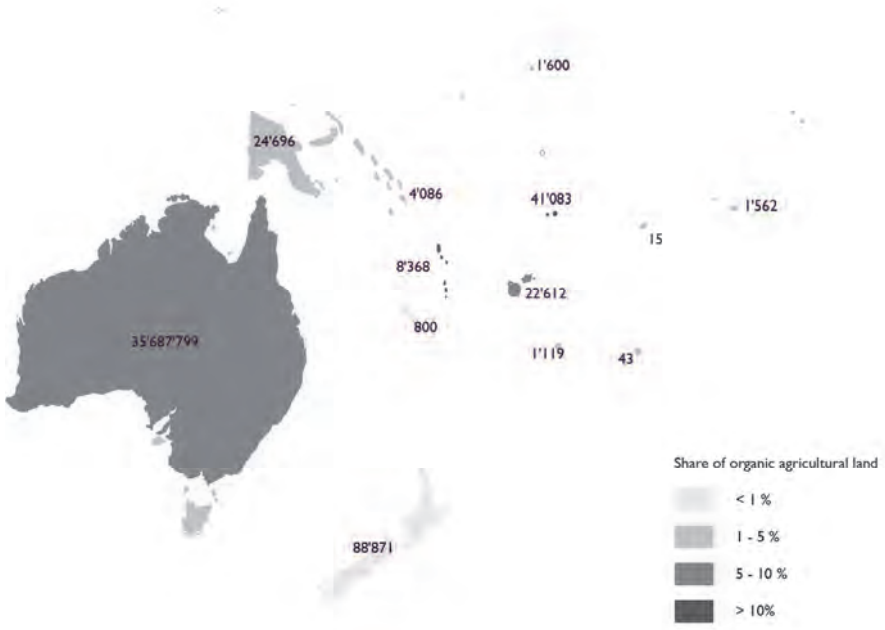
Source: Canada Organic Trade Association and United States Department of Agriculture; FiBL survey 2021

Table 80: North America: Land use in organic agriculture 2019

Land use	Crop group	Area [ha]
Arable land crops	Cereals	582'255
	Dry pulses and protein crops for the production of grain	104'829
	Flowers and ornamental plants	54
	Fresh vegetables and melons	80'120
	Hops	
	Medicinal and aromatic plants	1'648
	Mushrooms and truffles	11'418
	Oilseeds	137'978
	Plants harvested green	353'115
	Root crops	14'825
	Seeds and seedlings	59
	Strawberries	2'149
	Textile crops	16'601
	Arable crops, other	6'847
Arable land crops total		**1'311'899**
Cropland, no details		**581'488**
Permanent crops	Berries	16'782
	Citrus fruit	5'403
	Coffee	115
	Fruit, temperate	19'117
	Fruit, tropical and subtropical	5'122
	Grapes	27'444
	Nurseries	77
	Nuts	9'776
	Olives	628
Permanent crops total		**84'464**
Permanent grassland		**1'669'772**
Total		**3'647'623**

Source: Canada Organic Trade Association and United States Department of Agriculture; FiBL survey 2021

Oceania



Map 7: Organic agricultural land in the countries of Oceania 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers and governments.

Australia

NICOLE FORD[1] AND OWEN GWILLIAM[2]

Introduction

Australia continues to hold the world's largest area of agricultural land under certified organic management. 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.

Certified organic producers and processors are found in all Australian states and territories, each with their particular niches. Due to the drought, shortages of available feed for many livestock producers (particularly in New South Wales (NSW) and Queensland), the year 2020 has seen the largest demand for organic hay and grain for at least a decade with livestock fodder transported from Western Australia, South Australia and Victoria, north to New South Wales and Queensland.

Estimated to be worth 2.6 billion Australian dollars[3] (2018), the Australian organic industry (exports and retail sales) has continued to grow despite continuing harsh environmental conditions. The southern and eastern regions of Australia were devastated by extensive damage from multiple bushfires during what is now called The Black Summer.

The Black Summer

It is suggested a significant lightning strike in October 2019 detonated what would become the most devastating fire season in Australia's living history. Fuelled by years of drought, hot summer temperatures and an abundance of fuel load such as dry leaf litter, over ten million hectares of bushland were incinerated. It is estimated that more than a billion animals were lost, over 3000 homes were burnt, and 33 people lost their lives.

For the first time in the Australian organic industry history, organic operators were represented during key discussions with Australian Organic Limited (AOL), the newly established peak body, who were invited to have a seat at the Parliamentary roundtable alongside all other peak body representatives.

With a commitment to provide swift support, AOL convened an industry advisory committee that provided detailed information and advice for affected operators. Australian communities are still reeling over this disaster, with many operators still

[1] Nicole Ford, Chief Executive Officer, Australian Organic Ltd, Nundah, Australia, www.austorganic.com
[2] Owen Gwilliam, Chief Technical Officer, Australian Organic Ltd, Nundah, Australia, www.austorganic.com
[3] This corresponded to approximately 1.65 billion euros.

living in difficult conditions. For some of the hardest-hit regions, re-establishing their farming operations will take much time; regions such as the South West Slopes and Northern Rivers regions of New South Wales have lost entire orchards and native tea tree plantations. Many of these operators will be without production for years.

Table 81: Australia: Fire extent area during 2019–20 summer bushfire season in southern and eastern Australia

Data as at 28 April 2020, and the area of forest in this extent, by jurisdiction

Jurisdiction	Fire area (thousand hectares)	Forest area in fire area (thousand hectares)	Proportion of fire area that is forested (%)
Australian Capital Territory	90	83	93
New South Wales	5'682	5'123	90
Northern Territory	0	0	0
Queensland	574	514	90
South Australia	313	137	44
Tasmania	45	30	65
Victoria	1'583	1'457	92
Western Australia	2'044	1'143	56
Total	**10'331**	**8'486**	**82**

Sources:
- Fire extent derived from the Department of Agriculture, Water and the Environment National Indicative Aggregated Fire Extent Dataset (v20200428) current to 28 April 2020
- Preliminary Area for Environmental Analysis – 2019/20 Fires[1]
- Forest area derived from the National Forest Inventory Forests of Australia (2018) spatial dataset.

Notes: Refer the National Indicative Aggregated Fire Extent Dataset metadata statement[2] for information on the purpose, lineage, known issues and data limitations of the fire extent dataset.
Totals may not tally due to rounding.

Production & manufacturing

Organics now represents 1.8 billion Australian dollars[3] or 3 percent of the total production value of all agricultural commodities produced in Australia.

Fruit, vegetables, nuts, meat, grains, eggs, and poultry meat constitute 82 percent of the production value with continued significant growth of fruit, vegetables and nuts by around 17 percent since 2017.

[1] Preliminary Area for Environmental Analysis – 2019/20 Fires is available on the website of the Australian Government at environment.gov.au/system/files/pages/a8d10ce5-6a49-4fc2-b94d-575d6d11c547/files/preliminary-analysis-area-19-jan-2020.pdf

[2] The National Indicative Aggregated Fire Extent Datasets are available on the website of the Australian government at environment.gov.au/fed/catalog/search/resource/details.page?uuid=%7B9ACDCB09-0364-4FE8-9459-2A56C792C743%7D

[3] This corresponded to approximately 1.09 billion euros (2020).

There has been substantial growth across all the sectors, with an estimated Compound Annual Growth Rate (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.

As the major supermarket retailers expand their private label range, an increase in availability is driving more mainstream consumption. Large beverage businesses have also developed new products as demand grows with Australia's first mainstream organic beer and cider launched in October 2019 and showcased at a large sporting event.

The beverage category grew 7 percent in 2019, while organic food sales have increased by five percent.

According to an IBISWorld report, the Australian organic farming industry's revenue is forecast to grow at an annualised 15.1 percent over the five years through 2024-25, to 3.7 billion Australian dollars.

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 organisations: AUS-QUAL, 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 (SXC).

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 SXC certify directly to 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, Water and the Environment (DAWE).

Through 2018 – 2020, the Australian Government conducted a review of Australia's organic export regulation, the Export Control (Organic Produce Certification) Orders under the Export Control Act 1982. The review considered whether the regulation of exported organic products should continue, and if so, how and to which standard. AOL made various submissions and contributed to the review on behalf of our industry, in a collaborative effort with the Department of Agriculture, Water and the Environment.

The outcome of the review is the publishing of a new Export Control (Organic) Rules document that will come into effect in March 2021. The new rules include sensible and practical improvements, including directly referencing the National Standard and the

exclusion of cosmetics products from the scope of the Rules. These new rules provide clarity and certainty to allow our industry to move forward with ongoing and improving export market access.

Following on from the improvements to the regulatory system for exports, on 18 December 2020, after two years of AOL lobbying Government and industry, the Australian Minister for Agriculture, Water and the Environment has requested his Department appoint an Organics Industry Advisory Group to investigate the creation of a nationwide regulatory framework for the production and sale of organic products domestically. The group will review whether the current domestic regulatory framework is fit for purpose and to better understand the potential of improving current regulations to facilitate the development and growth of the organic industry.

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https://www.agriculture.gov.au/abares/forestsaustralia/forest-data-maps-and-tools/fire-data

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Willer, Helga et al. (Eds) (2020): The World of Organic Agriculture - Statistics and Emerging Trends 2020. Research Institute of Organic Agriculture FiBL and IFOAM - Organics International, 2020. https://www.organic-world.net/yearbook/yearbook-20192.html

The Pacific Islands

KAREN MAPUSUA[1]

Recent developments

While generally, certification continues to expand across the Pacific, some countries are reflecting a drop in certified land in recent years. This can be attributed to natural disasters affecting perennial crops, such as coconuts, causing the licensees to suspend or leave certification programs until their crops produce again. Governments are becoming increasingly interested in creating a supportive policy environment. A significant development is regional and national agencies and development partners increasingly recognising the value of organic agriculture as a development tool for the Pacific islands context.

Market, trade and certification

Most of the Pacific's organically certified products 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. In Table 82, the main products that are currently organically certified in the Pacific are listed.

Table 82: Pacific Islands: Main certified organic products

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
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

While POETCom has systems in place for collating third part and PGS certification data, until now, there are no mechanisms for collecting local organic market data. Growth can be inferred from the increase 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

[1] Karen Mapusua, Operations Manager Land Resources Division, Pacific Community (SPC), Private Mail Bag, Suva, Fiji, www.spc.int/

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, creating a need to upskill those PGS that include processing to manage the more complex inspection requirements.

In 2019 there were ten PGS approved to use the Organic Pasifika Mark. The number and variety of PGS certified products on local markets and export are expanding, and 2019 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 organics' value 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. The Republic of the Marshall Islands has small amounts of certified fresh produce available in selected supermarkets. Fiji 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 licences. For some growers of permanent crops, such as coconuts, tropical cyclones' devastation 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 the Central Banks' published export data combined with other market intelligence can provide insights in a few instances. For example, the Central Bank of Samoa published data in 2019 that showed a 3600 percent increase in coconut oil exports within 12 months and a 400 percent increase in coconuts' farm gate price. Cross-referenced with other intelligence, this growth can be attributed to the rapid growth in exports from new players in the coconut industry who exported organic and fair-trade coconut oil in the previous 12 months. Such rapid expansion of organic exports cannot be claimed as regionally widespread, but it does show the potential for some organic value chains.

Legislation

New Caledonia and French Polynesia remain the only Territories to regulate organics. Independent countries of the region have not yet passed organic regulations; however, Samoa has commenced drafting an organic bill. The Government of Vanuatu has endorsed its first national organic policy. The Government of Fiji is now consulting on a draft policy developed by the country's organic sector and presented to Government – a unique bottom-up approach to policy development.

Government and international support

A regional intergovernmental organisation, The Pacific Community, continues to provide support for organics development and houses the secretariat of POETCom, the Pacific Organic & Ethical Trade Community. 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 Samoa and Niue, where the national governments cover certification fees for national grower groups.

The growing interest of development partners in organics as a solution for climate resilience and livelihoods development is demonstrated through the Building Prosperity for Women Producers through Organic Value Chains (BWBP) project, launched in 2018. It is a four-year project implemented in partnership with the Pacific Community (SPC), POETCom and the Australian Department of Foreign Affairs and Trade (DFAT) through the Pacific Women Shaping Pacific Development programme (Pacific Women). Pacific Women recognises the potential for organic value chains and mechanisms such as Participatory Guarantee Systems (PGS) to empower women economically and socially. The organisation worked with POETCom to design the project to work with organic producers, processors, vendors and organic associations and focus on niche organic products that women can develop.

Another example is the PROTÉGÉ project in the Pacific French Territories, funded by the European Union. PROTÉGÉ stands for the 'Projet régional océanien des territoires pour la gestion durable des écosystèmes' (Pacific Territories Regional Project for Sustainable Ecosystem Management). It aims to strengthen the sustainability, climate change adaptation and autonomy of key sectors and enhance ecosystem-services by protecting water resources and biodiversity. Agroecology and organic agriculture form the basis of the agriculture component of the programme.

Outlook

Development partners' 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 interested in funding programmes of this nature. There is also an expectation that the local market for organic products will continue to expand as the tourism and hospitality industries in the Pacific Islands develop their brand for organic and sustainability.

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/

Oceania: Current statistics

CLAUDIA MEIER, BERNHARD SCHLATTER, OLIVIA KELLER AND JAN TRÁVNÍČEK

In 2019, the organic agricultural land in Oceania was almost 35.9 million hectares, which constituted 9.6 percent of the total agricultural area in the region. Half of the world's organic agricultural land was in Oceania. The area under organic production has increased almost seven-fold since 2000 (5.3 million hectares). Between 2018 and 2019, the area in Oceania decreased by 118′000 hectares – 0.3 percent less - due to a drop in the organic agricultural area in Samoa (almost 57′000 hectares, 58 percent loss), Papua New Guinea (nearly 25'000 hectares, 50 percent loss), Fiji (almost 19′000 hectares, 45 percent loss), and Vanuatu (over 17'000 hectares, 67 percent loss). The country with the biggest organic agricultural area is Australia with 35.7 million hectares, and the highest organic share of total agricultural land was in Samoa, with 14.5 percent of all farmland under organic cultivation, followed by Australia with 9.9 percent.

In 2019, 97 percent of all organic farmland in Oceania was grassland/grazing areas (34.7 million hectares). Almost all of the organic grassland/grazing areas were in Australia (34.6 million hectares), with a very small share in New Zealand (over 64'000 hectares). Of the almost 103'000 hectares of organic permanent crops, the largest share was used for coconuts (over 59'000 hectares; mainly in Samoa), coffee (almost 11'000 hectares; only Papua New Guinea), and grapes (almost 8'000 hectares; mainly in Australia). Organic permanent crops played an important role in the region. For coconuts, the organic share in the region was 12 percent, for coffee it was 20 percent, for grapes it was 4 percent, and for tea (487 hectares) it was 12 percent. In 2019, almost 20 percent of the world's organic coconuts area was in Oceania. Organic arable crops were grown on over 45'000 hectares. The key arable crop was cereals, with over 41'000 hectares (only Australia), representing 0.2 percent of the total cereals area in the region and 0.8 percent of the world's organic cereals area.

There were over 18'000 organic producers in the region, with the largest number of producers in Papua New Guinea (over 12'000 producers), Samoa (almost 2′000 producers), and Australia (almost 2'000 producers). Since 2006, when data for most of the countries became available, their number more than doubled.

In 2018, the total organic market was almost 1.4 billion euros for the region (new data were not available at the time of writing). Australia reported an organic market of 1.2 billion euros and New Zealand a retail sales value of 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 298.

Organic Agriculture in Oceania: Graphs

Oceania: Organic agricultural land by country 2019
Source: FiBL survey 2021

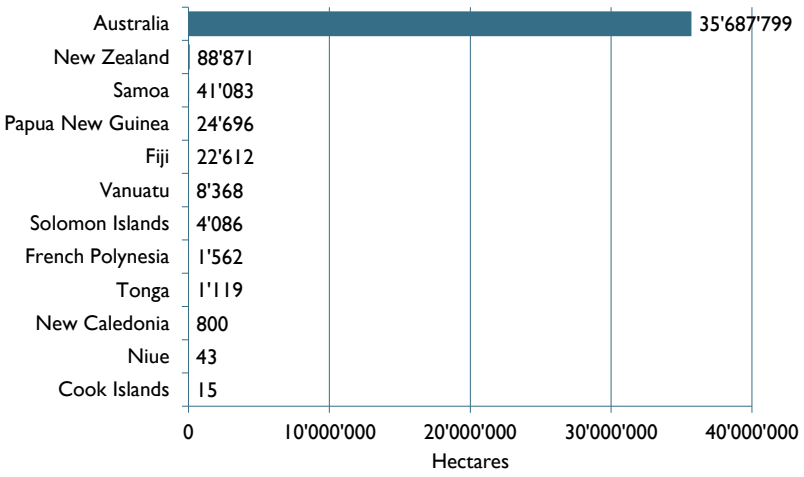

Figure 101: Oceania: Organic agricultural land by country 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Oceania: Organic share of total agricultural land by country 2019
Source: FiBL survey 2021

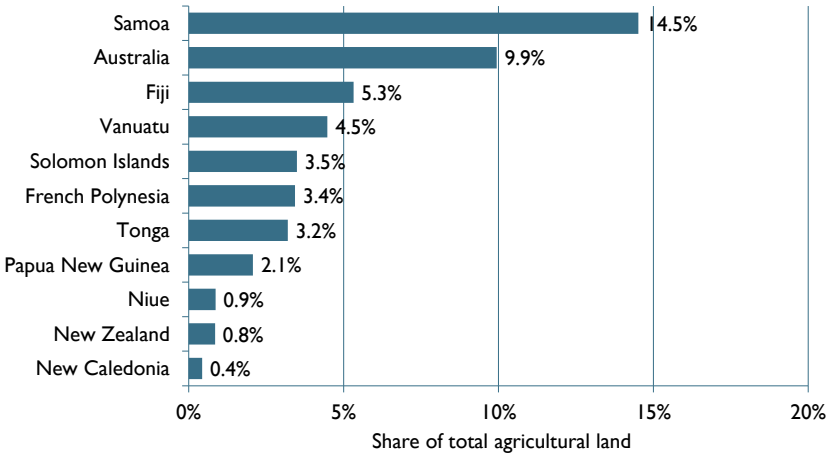

Figure 102: Oceania: Organic share of total agricultural land by country 2019

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Oceania: Development of organic agricultural land 1999-2019

Source: FiBL-IFOAM-SOEL-Surveys 2001-2021

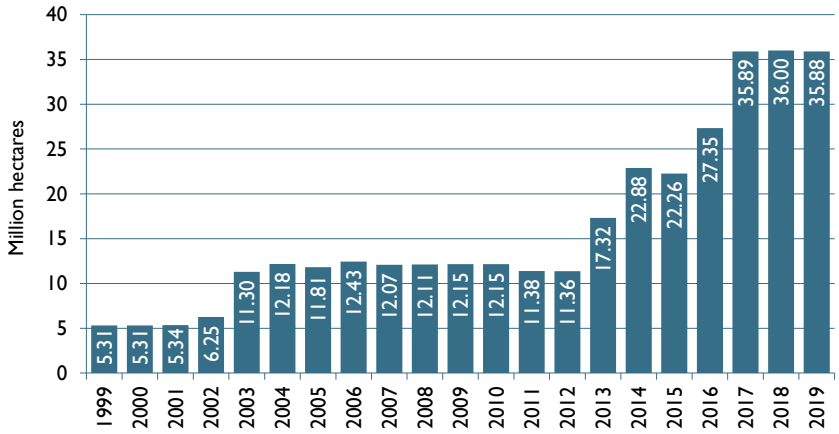

Figure 103: Oceania: Development of organic agricultural land 1999-2019

Source: FiBL-IFOAM-SOEL 2001-2021; based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Organic Agriculture in Oceania: Tables

Table 83: Oceania: Organic agricultural land, organic share of total agricultural land, and number of producers 2019

Country	Area [ha]	Share of total agri. land [%]	Producer [no.]
Australia	35'687'799	9.9%	1'829
Cook Islands	15	1.0%	58
Fiji	22'612	5.3%	13
French Polynesia	1'562	3.4%	59
New Caledonia	800	0.4%	
New Zealand	88'871	0.8%	876
Niue	43	0.9%	
Papua New Guinea	24'696	2.1%	12'458
Samoa	41'083	14.5%	1'875
Solomon Islands	4'086	3.5%	1'127
Tonga	1'119	3.2%	81
Vanuatu	8'368	4.5%	40
Total	**35'881'053**	**9.6%**	**18'416**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Table 84: Oceania: All organic areas 2019

Country	Agriculture [ha]	Wild collection [ha]	Total [ha]
Australia	35'687'799		35'687'799
Cook Islands	15		15
Fiji	22'612		22'612
French Polynesia	1'562		1'562
New Caledonia	800		800
New Zealand	88'871		88'871
Niue	43	112	155
Papua New Guinea	24'696		24'696
Samoa	41'083		41'083
Solomon Islands	4'086		4'086
Tonga	1'119		1'119
Vanuatu	8'368		8'368
Total	**35'881'053**	**112**	**35'881'165**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Table 85: Oceania: Land use in organic agriculture 2019

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		23'412
Arable land crops	Cereals	41'293
	Fresh vegetables and melons	4'035
	Sugarcane	7
Arable land crops total		45'334
Cropland, no details		41'659
Other agricultural land		986'408
Permanent crops	Coconut	59'246
	Coffee	10'855
	Fruit	4'567
	Fruit, tropical and subtropical	76
	Grapes	7'503
	Tea/mate, etc.	487
	Permanent crops, other	20'063
Permanent crops total		102'797
Permanent grassland		34'681'443
Total		**35'881'053**

Source: FiBL survey 2021, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 317

Outlook

Building Resilience

LOUISE LUTTIKHOLT[1]

The year 2020 will undoubtedly be remembered for the global COVID-19 pandemic, which will not have ended when this book is published at the beginning of 2021. Its impact is likely to be felt for a much longer time. The crisis has provided us with a moment for reflection and revealed the vulnerability of global food systems.[2] We need to conclude that industrial agriculture drives habitat loss and helps create the conditions for viruses to emerge and spread in the first place. And this in a world where millions of people are already living with hunger, malnutrition and extreme poverty. There can be only one conclusion here: we need to transition to sustainable and resilient food systems, now and not in the distant future.

The transformation of agriculture and food systems is something which the organic sector has been shaping and practising for decades. We are happy to build on all these experiences and also share them with others. We have the Principles of Health, Ecology, Fairness and Care to guide and shape our vision for a truly sustainable world. Organic farmers are applying good and best practices that are already contributing to our planet's sustainable future. There are legally protected standards on what can be called 'organic' and formal and informal ways of verification. The positive impact of organic goes way beyond formal regulations: organic inspires, also beyond our sector. Organic and agroecological practices are studied and shared widely, even if applied in single measures – all contributions count.

There is increasing awareness of the need to value our shared environment, biodiversity and earth. In short, the role of agriculture in achieving the Sustainable Development Goals (SDGs) is obvious. We do observe increasing interest from governments transforming food systems to making them contribute to the common good. And only if governments ensure that policies are coherently aligned with the SDGs will agriculture become part of the solution instead of being part of the problem.[3]

As a membership-based organisation, IFOAM – Organics International has the task and takes every opportunity to influence government policies and regulations around the world directly. We also work to inform and coach high-level decision-makers by bringing them together in the Food Policy Forum for Change. We are heartened to see more and more citizen-driven food councils influence their municipalities on a local level, ensuring their local food systems become more resilient.

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[1] Louise Luttikholt, Exceutive Director IFOAM – Organics International, 53113 Bonn, Germany, www.ifoam.org

[2] IPES FOOD (010): COVID-19 and the Crisis in Food Systems. Communiqué by IPES-Food, April 14, 2020. Available at http://www.ipes-food.org/_img/upload/files/COVID-19%20Press%20Release%20EN.pdf

[3] Eyhorn, F., Muller, A., Reganold, J. P., Frison, E., Herren, H. R., Luttikholt, L., Mueller, A., Sanders, J., Scialabba, N., Seufert, V., & Smith, P. (2019). Sustainability in global agriculture driven by organic farming. Nature Sustainability, 2, 253-255. https://doi.org/10.1038/s41893-019-0266-6

Indeed, COVID has shown how all living beings are connected. The notion of 'One Health' expresses the interdependencies and vulnerable balances in our 'One Earth System'. We know that good, nutritious food increases our individual resilience; in COVID times, it almost looked as if food was regarded as medicine. Organic agriculture has a lot to offer for systemic, positive health by reducing pesticide levels, contributing to a healthy environment and focussing on seasonality and proximity. We will learn in 2021 whether the Food Systems Summit, which is conceived as high level, inclusive event 'to launch bold and new actions to transform the way the world produces and consumes food'[1] takes these signals seriously.

IFOAM – Organics International will keep up the public pressure, as we know that persistency pays off: our global campaign #IGrowYourFood[2] culminating in an action day will run for the third time in 2021. We invite all organic and agroecological farmers to share their motivation, practices and messages on growing organic food. We would like to hear and learn from them and pay them the respect they deserve. We are happy to do so together with our Network, especially the organic farmers gathered in the International Network of Organic Farmers' Organisations (INOFO), which has gained strength and momentum over the past years.

Many events have been postponed and replanned due to COVID. The Organic World Congress is no exception to this and will now take place from September 7-9, 2021. The venue stays the same: Rennes in France. I sincerely hope that we can reconvene in person by that time. Meanwhile, I wish for us all to stay safe and healthy

[1] https://www.un.org/en/food-systems-summit: Website of the United Nations Food Systems Summit 2021
[2] https://campaigns.ifoam.bio/igrowyourfood/2020: Website of the IFOAM Campaign #IGrowYourFood

Annex: Key Indicators by Country and Region

Table 86: Key indicators by region 2019

Region	Organic area [ha]	Shares of the global organic farmland area [%]	Organic share of total farmland area [%]	Growth 2018-2019 [%]	Organic producers [no.]	Organic retail sales [Million €]
Africa*	2'030'830	2.8%	0.2%	+10.2	850'490	17
Asia	5'911'622	8%	0.4%	-10.3	1'589'563	10'949
Europe	16'528'677	23%	3.3%	+5.9	430'742	45'049
Latin America	8'292'139	11%	1.2%	+3.5	224'388	810
North America	3'647'623	5%	0.8%	+9.1	22'153	48'201
Oceania	35'881'053	50%	9.6%	-0.3	18'416	1'378
World**	**72'285'656**	**100%**	**1.5%**	**+1.2**	**3'135'129**	**106'404**

Source: FiBL survey 2021. 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 87: Key indicators by country 2019

Country	Organic area [ha]	Organic share [%]	Organic producers [no.]*	Organic retail sales [Million €]
Afghanistan	786	0.002%	1	
Albania	653	0.1%	86	
Algeria	772	0.002%	64	
Andorra	2	0.01%		
Argentina	3'672'350	2.5%	1'269	
Armenia	594	0.04%	29	
Australia	35'687'799	9.9%	1'829	1'224
Austria	669'921	26.1%	26'042	1'920
Azerbaijan	37'630	0.8%	305	3
Bahamas	49	0.3%	1	
Bangladesh	2'249	0.02%	2	
Belarus	1'375	0.02%	31	
Belgium	93'119	6.9%	2'394	779
Belize	77	0.04%	157	0
Benin	15'164	0.4%	5'170	
Bermuda				Processing
Bhutan	6'632	1.3%	4'354	0
Bolivia (Plurinational State of)	144'231	0.4%	14'161	
Bosnia and Herzegovina	1'692	0.1%	337	0
Brazil	1'283'054	0.5%	22'191	778
Brunei Darussalam				Aquaculture
Bulgaria	117'779	2.3%	6'213	30
Burkina Faso	87'490	0.7%	29'214	
Burundi	84	0.004%	25	
Cambodia	25'757	0.5%	6'350	
Cameroon	204	0.002%	499	
Canada	1'321'072	2.3%	5'677	3'480
Cape Verde	495	0.6%	1	
Chad	1'113	0.002%		
Channel Islands	180	2.0%		
Chile	20'897	0.1%	781	2
China	2'216'000	0.4%	6'308	8'504
Colombia	30'447	0.1%	4'155	
Comoros	1'164	0.9%	851	

Country	Organic area [ha]	Organic share [%]	Organic producers [no.]*	Organic retail sales [Million €]
Cook Islands	15	1.0%	58	
Costa Rica	8'832	0.5%	54	1
Côte d'Ivoire	66'728	0.3%	2'905	
Croatia	108'127	7.2%	5'153	99
Cuba	2'373	0.04%	9	
Cyprus	6'240	5.0%	1'252	2
Czech Republic	540'986	15.4%	4'694	164
Democratic Republic of the Congo	88'727	0.3%	34'613	
Denmark	285'526	10.9%	4'109	1'979
Dominica	240	1.0%		
Dominican Republic	134'375	5.5%	16'311	
Ecuador	47'836	0.9%	13'744	
Egypt	116'000	3.0%	970	
El Salvador	1'708	0.1%	380	
Estonia	220'737	22.3%	2'060	55
Eswatini	843	0.1%	2	
Ethiopia	221'189	0.6%	203'602	13
Falkland Islands (Malvinas)	31'937	2.8%	3	
Faroe Islands	251	8.4%	1	
Fiji	22'612	5.3%	13	
Finland	306'484	13.5%	5'129	368
France	2'240'797	7.7%	47'196	11'295
French Guiana (France)	3'667	11.3%	84	
French Polynesia	1'562	3.4%	59	
Gambia	68	0.01%	1	
Georgia	1'452	0.1%	1'075	
Germany	1'613'785	9.7%	34'136	11'970
Ghana	31'199	0.2%	3'199	
Greece	528'752	8.7%	30'124	66
Grenada	84	1.1%	23	
Guadeloupe (France)	492	1.0%	103	
Guam		0.0%		
Guatemala	88'178	2.3%	6'346	
Guinea	1'000	0.01%		
Guinea-Bissau	781	0.1%	1	
Guyana				Wild collection
Haiti	3'333	0.2%	4'633	
Honduras	29'274	0.9%	6'023	
Hong Kong				Processing
Hungary	303'190	5.7%	5'136	30
Iceland	5'740	0.4%	26	
India	2'299'222	1.3%	1'366'226	61
Indonesia	251'619	0.4%	18'162	
Iran (Islamic Republic of)	11'916	0.03%	24	
Iraq	63	0.001%		
Ireland	73'952	1.6%	1'725	206
Israel	6'307	1.0%	350	
Italy	1'993'225	15.2%	70'561	3'625
Jamaica	374	0.1%	127	1
Japan	10'792	0.2%	3'678	1'419
Jordan	1'446	0.1%	23	
Kazakhstan	294'289	0.1%	41	
Kenya	154'488	0.6%	37'295	4
Kosovo	1'036	0.2%	200	
Kuwait	33	0.02%	1	
Kyrgyzstan	19'054	0.2%	1'051	
Lao People's Democratic Republic	8'952	0.4%	2'165	
Latvia	289'796	14.8%	4'178	51
Lebanon	1'574	0.2%	122	
Lesotho		0.0%	3	

Country	Organic area [ha]	Organic share [%]	Organic producers [no.]*	Organic retail sales [Million €]
Liberia	2	0.0001%	1	
Liechtenstein	1'470	41.0%	47	
Lithuania	242'118	8.1%	2'417	51
Luxembourg	5'814	4.4%	105	160
Madagascar	76'530	0.2%	69'505	
Malawi	12'294	0.2%	5	
Malaysia	1'276	0.01%	31	
Mali	11'300	0.03%	12'272	
Malta	55	0.5%	24	
Martinique (France)	613	2.0%	80	
Mauritania				Wild collection
Mauritius	6	0.01%	19	
Mayotte	41	0.2%	11	
Mexico	301'891	0.3%	36'587	14
Moldova	27'833	1.2%	241	
Monaco				Processing
Mongolia	61	0.0001%	112	
Montenegro	4'751	1.8%	393	0
Morocco	9'917	0.03%	277	
Mozambique	7'762	0.02%	149	
Myanmar	12'948	0.1%	48	
Namibia	112	0.0003%	13	
Nepal	9'361	0.2%	983	
Netherlands	68'068	3.7%	1'867	1'211
New Caledonia	800	0.4%		
New Zealand	88'871	0.8%	876	155
Nicaragua	42'952	0.8%	10'448	
Niger	254	0.001%	2	
Nigeria	55'047	0.1%	319	
Niue	43	0.9%		
North Macedonia	3'711	0.3%	817	
Norway	45'312	4.6%	1'976	442
Oman	43	0.003%	5	
Pakistan	64'885	0.2%	415	
Palestine	5'388	1.2%	1'449	
Panama	5'929	0.3%	18	
Papua New Guinea	24'696	2.1%	12'458	
Paraguay	57'566	0.3%	5'122	
Peru	235'592	1.0%	80'785	14
Philippines	168'352	1.4%	12'037	
Poland	507'637	3.5%	18'655	314
Portugal	293'213	8.2%	5'637	21
Puerto Rico	14	0.01%	5	
Republic of Korea	29'711	1.8%	18'199	357
Réunion (France)	1'474	3.1%	38	
Romania	395'228	2.9%	9'277	41
Russian Federation	674'370	0.3%	57	160
Rwanda	1'265	0.1%	6'990	
Samoa	41'083	14.5%	1'875	
San Marino				Processing
São Tomé and Príncipe	10'934	24.9%	3'563	
Saudi Arabia	24'517	0.01%	244	296
Senegal	6'486	0.1%	18'375	
Serbia	21'266	0.6%	373	
Sierra Leone	157'531	4.0%	5'502	
Singapore	15	2.2%		16
Slovakia	197'565	10.3%	802	4
Slovenia	49'638	10.3%	3'823	49
Solomon Islands	4'086	3.5%	1'127	
Somalia				Wild collection

Country	Organic area [ha]	Organic share [%]	Organic producers [no.]*	Organic retail sales [Million €]
South Africa	30'214	0.03%	154	
Spain	2'354'916	9.7%	41'838	2'133
Sri Lanka	70'436	2.5%	2'338	
Sudan	73'903	0.1%	5	
Suriname	109	0.1%	39	
Sweden	613'964	20.4%	5'730	2'144
Switzerland	172'713	16.5%	7'284	2'912
Syrian Arab Republic	19'987	0.1%	2'458	
Taiwan	9'536	1.2%	3'761	
Tajikistan	10'340	0.2%	949	
Tanzania' United Republic of	278'467	0.7%	148'609	
Thailand	188'451	0.9%	118'985	12
Timor-Leste	32'472	8.5%	4	
Togo	38'506	1.0%	48'443	
Tonga	1'119	3.2%	81	
Tunisia	286'623	2.9%	7'456	
Turkey	518'435	1.4%	74'545	46
Uganda	183'598	1.3%	210'353	
Ukraine	467'980	1.1%	470	36
United Arab Emirates	4'642	1.2%	102	
United Kingdom	459'275	2.6%	3'581	2'679
United States of America	2'326'551	0.6%	16'476	44'721
United States Virgin Islands	26	0.7%		
Uruguay	2'143'640	15.3%	748	
Uzbekistan	932	0.004%	2	
Vanuatu	8'368	4.5%	40	
Venezuela (Bolivarian Republic of)				Processing
Viet Nam	61'901	0.5%	17'174	157
Zambia	207	0.001%	5	
Zimbabwe	848	0.01%	8	
World	**72'285'656**	**1.5%**	**3'135'129**	**106'404**

Source: FiBL survey 2021, based on data from governments, the private sector, and certifiers. For retail sales data: FiBL-AMI- survey 2021, based on data from government bodies, the private sector, and market research companies. For detailed data sources see annex, page 317
**Total number includes data for countries with less than three operators.*

Annex: Data Providers and Data Sources

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

› Area, operator, production, export, retail sales (MT) data: provided by SENASA, www.senasa.gov.ar

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.[1]

Contact

› Niki Ford, 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

› Import data: European Commission/Traces

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

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.

[1] 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

Bangladesh

Source

› For 2019, no new data were received.
› For 2018, data were provided by a local source. All certifiers active in the country were covered. The certified organic area was 6284.9 hectares. Aquaculture (shrimp) accounted for the major share (5781 hectares) of the certified area, while the rest (503.9 hectares) was used to grow organic tea. According to the source, an additional 152'240 hectares were under non-certified organic production. No producer numbers were supplied.
› Revisions: Some of the data used previously were removed from the database for all years.
› History: For the years 2008-2016, the data on the agricultural land from one international certifier were used (using 2012 data for up to 2016). For the aquaculture area, the data from an other international certifier were used. 850 smallholders active in aquaculture were reported. After 2016, the aquaculture data came from a third international certifier; the 2018 aquaculture data are from a local source, based on data from certifiers (see above). No numbers on the smallholders were provided for 2018.
› Please note that for Bangladesh the number of smallholder farmers is not included.
› Please note that due to the multiple and changing data sources, a direct year-to-year comparison is not possible for Bangladesh.

Contact

› Dr. Shaikh Tanveer Hossain, IFOAM Asia
› Dr. Khurshid Alam, BARI, Bangladesh

Belarus

Source

› Certifier data

Contact

› Lyubomyr Klepach, Center for Environmental Solutions (CES), 220029 Minsk, Belarus

Note

The data were collected by FiBL among international certifiers active in the countries. For 2017 and 2018, the Center for Environmental Solutions provided the 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
› Import data: European Commission/Traces

Contact

› Ilse Timmermans, Landbouw en Visserij, Brussels, Belgium

Belize

Source

› Area and producers: Certifier data.
› Export value and volume data is from 2015 and provided by the previous data source.

Note

› Please note that the data source changed in 2018 and that therefore a direct year-to-year comparison is not possible.

Benin

Source

› CERTISYS, 1150 Bruxelles, Belgium, www.certisys.eu.
› Control Union, Zwolle, The Netherlands, www.controlunion.org
› Ecocert Burkina Faso, Ouaga, Burkina Faso, www.ecocert.com
› Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de

Contact

› Ditta Fetekene, Control Union, Zwolle, The Netherlands, www.controlunion.org
› Tobias Fischer, Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
› Emmeline Foubert, CERTISYS, 1150 Bruxelles, Belgium, www.certisys.eu.
› Sisigué Arsène Sanou, Ecocert Burkina Faso, Ouaga, Burkina Faso, www.ecocert.com

Bermuda

› Certifier data (Processing)

Bhutan

Source

› Ministry of Agriculture (MOA), National Organic Programme DOA, Thimphu, Bhutan, www.moa.gov.bt

Contact

› Kesang Tshomo, Ministry of Agriculture MOA, National Organic Programme DOA, Thimphu, Bhutan, www.moa.gov.bt

Bolivia

Source

› Area, operator, production, export data from SENASAG, provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina.

› Area and production data for cocoa and sesame are from AOPEB (Bolivian Association of Organic Producers Organisations). This data is from 2014.

Note

› For 2019 data, the data source has changed: For 2014 and preceding years, data were based on a survey of the Bolivian Association of Organic Producers Organisations (AOPEP). This data was used up to 2018. For 2019, data were from National Service of Agricultural Health and Food Safety (SENASAG) (except for cocoa and sesame area and production data). Please note that therefore a direct year-to-year comparison is not possible.

› The 2019 data may partly include PGS data.

Contact

› Claudia Rocabado, SENASAG (Servicio Nacional de Sanidad Agropecuaria e Inocuidad Alimentaria), Trinidad, Bolivia

Bosnia Herzegovina

Source

› Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy

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 88, page 336 .

› Please note that area and operator data from MAPA may include PGS data.

› Please note that land use and crop details were available only from the international certifiers but do not cover the total organic farmland.

› Export value and retail sales data: Organic Brazil (2016 data)

› Production value data: Organics Brazil (2007)

Contact

› Virgínia Mendes Cipriano Lira, Ministério da Agricultura, Pecuária e Abastecimento (DTEC/SDA/MAPA), Coordenadora de Produção Orgânica, Brasilia, Brazil

Brunei Darussalam

› For Brunei Darussalam, no data was provided for 2019. Updates should be sent to helga.willer@fibl.org

Bulgaria

Sources

› Land area, operators: Eurostat and data from the Bulgarian Ministry of Agriculture provided by FOA Bioselena, Karlovo, Bulgaria. www.bioselena.com

› Retail sales (from 2018): Boshnakova, Mila (2020): Organic Market Annual Report Bulgaria: GAIN Report Number BU2020-0006, USDA, Foreign Agricultural Service, Washington

› Import data: European Commission/Traces

Contact

› Dr. Stoilko Apostolov, FOA Bioselena, Karlovo, Bulgaria. www.bioselena.com

Burkina Faso

Sources

› CERTISYS, Bruxelles, Belgium, www.certisys.eu.

› Ecocert West Africa, Ouagadougou, Burkina Faso

› LACON GmbH, Offenburg, Germany (2017 data)

Contact

› Emmeline Foubert, CERTISYS, 1150 Bruxelles, Belgium, www.certisys.eu

› Sisigué Arsène Sanou, Ecocert Burkina Faso, Ouaga, Burkina Faso, www.ecocert.com

Burundi

› Ecocert East Africa, Antananarivo, Madagascar

Contact

› Brayene Ramanantsoa, Ecocert East Africa, Antananarivo, Madagascar

Cambodia

Source

› Certifier data.

Cameroon

Source

› Ecocert West Africa, Ouagadougou, Burkina Faso, www.ecocert.com

Contact

› Sisigué Arsène Sanou, Ecocert Burkina Faso, Ouaga, Burkina Faso, www.ecocert.com

Canada

Source

› Land area, producers and other operator types, market data: Survey of the Canada Organic Trade Association (COTA), Ottawa, Canada, based on information from certifiers.

Contact

› Diana Zeidan, Special Projects Coordinator, Canada Organic Trade Association, Ottawa, Canada, http://ota.com/otacanada.html

Note

See also the article about organic farming in Canada in this and in previous editions of "The World of Organic Agriculture."

Cape Verde

Certifier data.

Chad

Certifier data. Not for all indicators updated data were provided.

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 2018.

Chile

Source

› Area data, producers/ smallholders, livestock and export/import data: Servicio Agrícola y Ganadero (SAG), Santiago, Chile, www.sag.gob.cl, provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina
› Retail sales 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

› Area, operator, production, and export data 2019: from five international certifiers.
› Area and operator data before 2019: Ministry of Agriculture and Rural Development (Ministerio de Agricultura y Desarrollo Rural), Bogotá, Columbia, to which details from several international certifiers were added. Please note that based on the data from the ministry, the 2017 data for the total area (published in "The World of Organic Agriculture 2019") were revised.
› Land use and crop data before 2019 were provided by ECONEXOS, Conexion Ecologica, Cali, Colombia, www.econexos.com, based on a survey among the certifiers. The land use and crop data are 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 national standard. This means that if an operator has, e.g. EU certification only and is not certified according to the national system, this data is not included. If an 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 (SFE), 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, Ouagadougou, Burkina Faso, www.ecocert.com
› Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de

Not all certifiers provided updated data.

Contact

› Ditta Fetekene, Control Union, Zwolle, The Netherlands, www.controlunion.org
› Tobias Fischer, Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
› Emmeline Foubert, CERTISYS, 1150 Bruxelles, Belgium, www.certisys.eu.
› Sisigué Arsène Sanou, Ecocert Burkina Faso, Ouaga, Burkina Faso, www.ecocert.com

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
› Import data: Import data: European Commission/Traces

Contact

› Darko Znaor, Independent Consultant, 10000 Zagreb, Croatia

Cuba

› Area, operators, and production data from two international certifiers.

Cyprus

Source

› Land area and producer data: Department of Agriculture, Nicosia, Cyprus, and Eurostat database, Eurostat, Luxembourg
› 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
› Import data: Import data: European Commission/Traces

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 2018.
› Import data: Import data: European Commission/Traces

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)
› Foodservice and exports: Statistics Denmark
› Import and export values: Statistics Denmark
› Import quantity data: European Commission/Traces

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

› Area, operators, production, and export data from 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

› Area, operators, production, and export data: Agrocalidad, Quito, Ecuador, www.agrocalidad.gob.ec
› Retail sales and export value data from 2017.

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

› Area, operators, production, export, retail sales data from the Ministerio de Agricultura y Ganadería (MAG), 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 2019. Compiled by the Estonian Organic Farming Foundation based on Ministry of Agriculture, Republic of Estonia, Tallin, and Eurostat database, Eurostat, Luxembourg
› Retail sales data: Estonian Institute of Economic Research, Estonia
› Export data: Estonian Ministry of Agriculture
› Import quantity data: European Commission/Traces
› 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

Equatorial Guinea

› For this country only export data are available (European Commission/Traces). Information on area and producers should be sent to helga.willer@fibl.org

Eswatini

Certifier data

Ethiopia

Sources

Area data

› Ceres, Happburg, Germany, www.ceres-cert.com
› Control Union, Zwolle, The Netherlands
› Ecocert South Africa, Stellenbosch, South Africa
› FiBL estimate for coffee area based on 2015 data from the Ethiopian Institute of Agricultural Research, Akaki, Ethiopia
› Onecert, Mansarovar, Jaipur, India, www.onecert.com
› Textile Exchange, London, UK (for Cotton data)

Producers

› As the data from the international certifiers do not always include the smallholder farmers, the number of producers that was provided by the Ethiopian Institute of Agricultural Research, was continued to be used.

Contact

› Lisa Barsley, Textile Exchange, London, UK
› Albrecht Benzing, Ceres, Happburg, Germany, www.ceres-cert.com
› Ditta Fetekene, Control Union, Zwolle, The Netherlands
› Daniël Kotzé, Ecocert South Africa, Stellenbosch, South Africa
› Ritu Priya, Onecert, Mansarovar, Jaipur, India, www.onecert.com

Note

For Ethiopia no new data have been received from the national data source since 2015. Therefore, data from international certifiers were used. A direct year-to-year comparison is therefore not possible.

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

Comment

The drop in area and number of producers is due to the challenging situation of the wool market, COVID-19 being one factor.

Faroe Islands

Source

› Vottunarstofan Tún ehf, Laugavegur 7, 101 Reykjavík, Iceland, www.tun.is.

Contact

› Gunnar Gunnarsson, Vottunarstofan Tún ehf., Reykjavík, Iceland, www.tun.is

Fiji Islands

Sources

› Pacific Organic and Ethical Trade Community (POETCom), Suva, Fiji, www.spc.int

Contact

› Karen Mapusua, Pacific Organic and Ethical Trade Community (POETCom), Suva, Fiji

Finland

Sources

› Land area and operators: Eurostat database, Eurostat Luxembourg.
› Market data: Pro Luomu, Kauniainen, Finland
› Export data: Pro Luomu, Kauniainen, Finland. Total exports are estimated at 25 to 30 million euros
› Import data: European Commission/Traces

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 (2017) and import (2018) data (values in Euros): Agence Bio, Montreuil-sur-Bois, France
› Import data (MT): European Commission/Traces

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
› The data is from 2015

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
› Import data (MT): European Commission/Traces

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, Ouagadougou, Burkina Faso
› Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de

Contact

› Ditta Fetekene, Control Union, Zwolle, The Netherlands
› Tobias Fischer, Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
› Emmeline Foubert, CERTISYS, Brussels, Belgium
› Sisigué Arsène Sanou, Ecocert Burkina Faso, Ouaga, Burkina Faso, www.ecocert.com

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
› Import data (MT): European Commission/Traces

Contact

› Nicolette van der Smissen, Feres, Greece

Grenada

Certifier data. The data is from 2018.

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

› Area, operators, and total export data: Department of Organic Agriculture, Ministerio de Agricultura, Ganaderia y Alimentación (MAGA), Ciudad de Guatemala, Guatemala C.A. 01013, www2.maga.gob.gt.
› Operators and production volume data (2014): USDA Foreign Agricultural Service, Global Agricultural Information Network (2015): Guatemala. USDA, Washington D.C.

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

› Rodrigo Misiac, Argencert, Buenos Aires, Argentina

Contact

› Rodrigo Misiac, Argencert, Buenos Aires, Argentina

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

› Area, operators, and production data from Agricultura Orgánica Honduras, Secretaria de Agricultura y Ganadería, Tegucigalpa, Honduras, SENASA Honduras.
› Data is from 2017.

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.

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
› Import data (MT): European Commission/Traces

Contact

› Dora Drexler and Bence Trugly, Hungarian Institute of Organic Agriculture ÖMKi, Budapest, Hungary, www.biokutatas.hu

Iceland

Source

› Vottunarstofan Tún ehf. Laugavegur 7, 101 Reykjavík, Iceland, www.tun.is.

Contact

› Gunnar Gunnarsson 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 addition to the 3rd party certified area, there were 649818.02 hectares with PGS certification managed by a total of 1'020'888 farmers organized in 37'344 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). To this data (from 2017), the 2019 data from one international certifier were added.

Contact

› Lidya Ariesusanty, Indonesian Organic Alliance, Bangor, Indonesia

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

Sources

› 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 for the years before 2017.

› Import data (MT): European Commission/Traces

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, and livestock products: SINAB (2020): Bio in Cifre 2019. SINAB, Rome, Italy, Eurostat database, Eurostat, Luxembourg, and Mediterranean Organic Network MOAN, Bari, Italy

› Retail sales data provided by Nomisma, Bologna, Italy

› Import data (MT): European Commission/Traces

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
› All data is from 2018.

Contact

› 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
› Rosario, Santa Fe, Argentina.
› Organic Standard, Kyiv, Ukraine

Contact

› Sergiy Galashevsky, Organic Standard, Kyiv, Ukraine
› Juan Gilardoni, LETIS, Rosario, Santa Fe, Argentina
› 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
› The data is from 2018.

Contact

› Samuel Ndungu, Kenya Organic Movement (KOAN), Nairobi, Kenya, www.koan.co.ke

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 as well as data from Textile Exchange about Cotton 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.
› To the data of DOA, the data for some crops from an international certifier were added.

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
› Import data (MT): European Commission/Traces

Lebanon

Source

› CCPB Middle East, Beirut, Lebanon

Contact

› Angel Atallah, CCPB Middle East, Beirut, Lebanon

Lesotho

› The certifier who provided data in the past is not active in the country anymore.

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
› Import data (MT): European Commission/Traces

Contact

› Virginija Luksiene, Ekoagros, Kaunas, 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 and Statistical Office of Luxembourg/Ministère de l'Agriculture, de la Viticulture et du Développement rural. Organic shares of total retail sales were calculated by FiBL using Eurostat retail sales data
› Import data (MT): European Commission/Traces

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
› Daniël Kotzé, Ecocert South Africa, Stellenbosch, South Africa, 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
› Daniël Kotzé, Ecocert South 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

Certifier data.

Mali

Certifier data. The data is from 2017.

Malta

Source

› Area, operators, livestock, production: Eurostat database, Eurostat, Luxemburg
› Import data (MT): European Commission/Traces

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 since the 2018 data, and that a direct year-to-year comparison is not possible with the data received after 2017. 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). Data from the Mexican Ministry of Agriculture only include operators that are certified under the national law for organic products (LPO). In 2018, the Ministry issued a communication that all organic operators, regardless of the destination market of their products, must be certified under the LPO. Therefore, there was a significant increase in the area reported in 2019, compared to 2018, as many operators who initially only certified their products under the standards of the countries to which they exported, were also certified under the national law in 2019. 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

› Nadejda Mocanu, Country Director Farmer-to-Farmer, Cultivating New Frontiers in Agriculture, Chisinau, Moldova, www.cnfa.org based on a survey among the certifiers active in the country

Contact

› Nadejda Mocanu, Country Director Farmer-to-Farmer, Cultivating New Frontiers in Agriculture, Chisinau, Moldova, www.cnfa.org

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. Historical data are currently revised by the government.

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
› The data is from 2018.

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

Contact

› Ditta Fetekene, Control Union, Zwolle, The Netherlands
› Tobias Fischer, Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
› Daniël Kotzé, Ecocert South Africa, Stellenbosch, South Africa
› Ritu Priya, Onecert, Mansarovar, Jaipur, India, www.onecert.com

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

› Maheswar Ghimire, Kathmandu, Nepal. To this data, some crop details and operator data from certifiers were added.

Netherlands

Sources

› Land area and operator data: Eurostat database, Eurostat, Luxembourg.
› Retail sales and export data: Bionext, Ede, The Netherlands; the Bionext website, https://bionext.nl/. The export data is from 2016.
› Import data (MT): European Commission/Traces

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.
› The data is from 2018.

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

› Control Union, Zwolle, The Netherlands, www.controlunion.org.
› Ecocert South Africa, Stellenbosch, South Africa
› LACON, Offenburg, Germany (2017 data)

Note

› Data provided in the past from the Association of Organic Agriculture Practitioners of Nigeria (NOAN), Ibadan, Nigeria, and the University of Ibadan, Nigeria, which included PGS data were removed as there seemed duplication with the certifier data.
› Producers: Please note that the certifiers did not provide the total number of producers; in most cases, only the number of companies/projects/certificates were provided. The number of producers must therefore be considerably higher.

Contact

› Olugbenga O. AdeOluwa, University of Ibadan, Nigeria
› Ditta Fetekene, Control Union, Zwolle, the Netherlands, www.controlunion.org.

› Daniël Kotzé, Ecocert South Africa, Stellenbosch, South Africa

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

› Land area and operator data: Eurostat database, Eurostat, Luxembourg
› 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.
› The data is from 2018.

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 (SENAVE), 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. For some crops no detailed area data was available. Therefore, crop details were used from one certifier who supplied these.
› Domestic market data: PromPeru, Lima, Perú, www.promperu.gob.pe.
› 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 (2018 data)
› 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
› Retail sales: Biokurier, Bydgoszcz
› Import data (MT): European Commission/Traces

Note

Please note that retail sales data do not cover all retail sales.

Portugal

Source

› Organic land and operators: Eurostat database, Luxembourg
› Market data (2011): INTERBIO, http://www.interbio.pt
› Import data (MT): European Commission/Traces

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 values (in Euros, 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.
› Import data (MT): European Commission/Traces

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 and Certification for Organic Products Office (CCPB), Roberto Maresca, Ufficio Attività di Controllo e Certificazione Prodotti Biologici, , Bologna, www.ccpb.it
› 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
› LETIS, Rosario, Santa Fe, Argentina
› 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
› Juan Gilardoni., LETIS, Rosario, Santa Fe, Argentina
› Pedro Landa, Organización Internacional Agropecuaria (OIA), Buenos Aires, Argentina
› Virginija Luksiene, Ekoagros, Kaunas, Lithuania
› 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 and as certifiers are added not included previously.

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. (2017 data) The number of producers was provided by Ecocert (2017 data).

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

Sources

› Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
› CERTISYS, 1150 Bruxelles, Belgium, www.certisys.eu.
› Ecocert Burkina Faso, Ouaga, Burkina Faso, www.ecocert.com

Contacts

› Tobias Fischer, Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
› Emmeline Foubert, CERTISYS, 1150 Bruxelles, Belgium, www.certisys.eu.
› Sisigué Arsène Sanou, Ecocert Burkina Faso, Ouaga, Burkina Faso, www.ecocert.com

Note

No update date had been received from the National Federation for Organic Agriculture, Thiès, Sénégal, and the data were removed, with the exception of the number of producers as the certifiers only provided the number of companies/projects/certificates.
Please note that the area data include nuts, some of which might potentially be wild collection.

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.
Please note that one certifier combined the area for cocoa and coffee; FiBL made an estimate of how much of this area was for coffee and how much for cocoa.

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
› Import data (MT): European Commission/Traces

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
› Retail sales (from 2103): Institute for Sustainable Development, Ljubljana, Slovenia
› Marketing channels (from 2009): Institute for Sustainable Development, Ljubljana, Slovenia
› Export and import values (in Euros) are from 2009: Institute for Sustainable Development, Ljubljana, Slovenia
› Import data (MT): European Commission/Traces

Contact

› Anamarija Slabe, Institute for Sustainable Development, Ljubljana, Ljubljana, Slovenia

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

› Control Union, Zwolle, The Netherlands, www.controlunion.org
› Ecocert South Africa, Stellenbosch, South Africa
› Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
› LACON GmbH, Offenburg, Germany (2017 data)

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. Also for 2018, the area for 2018 was revised as some areas had been counted as agricultural land, when in fact these were wild collection areas. The revised figure for 2018 is 23'278 hectares.

Contact

› Ditta Fetekene, Control Union, Zwolle, The Netherland
› Tobias Fischer, Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
› Daniël Kotzé, Ecocert South Africa, Stellenbosch, South Africa

Spain

Sources

› Area and land use, operators: Ministerio de Agricultura y Pesca, Alimentación y Medio Ambiente (2010): Estrategias de vertebración del sector de la producción ecológica de España – Año 2019. MAPAMA, Madrid
› Retail Sales: Ecovalia (2018 data)
› Import data (MT): European Commission/Traces
› International trade data (values) 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.
› Import data (MT): European Commission/Traces

Contact

› Pedro López, Pro-Voc-Association, Madrid, Spain, www.provotec.es

Sri Lanka

Source

› The data were compiled by FiBL using the data from several international certifiers.

Sudan (former)

Source

Certifier data

Suriname

› Certifier data

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.
› Import data (MT): European Commission/Traces

Contact

› Olle Ryegård, Ecoweb, Sweden.

Switzerland

Sources

› Land area and crop data, producers: Federal Agency for Statistics (BfS), Neuchatel, Switzerland.
› Processors: Bio Suisse, Basel, Switzerland
› Retail sales 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 various sources were removed, as no updates were received. Instead, the data from Textile Exchange on cotton and cotton producers were used.

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. The data is from 2017.
› To the TOAM data, wild collection data from international certifiers were added.

Thailand

Source

› Green Net Survey among the international and domestic certifiers; Green Net, 10330 Bangkok, Thailand. Domestic market and international trade data are from 2014.

Contact

› Vitoon Panyakul, Green Net, 10330 Bangkok, Thailand, www.greennet.or.th.

The big increase in the organic area is due to the increase of organic rice

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.

› Ceres, Happburg, Germany
› CERTISYS, Brussels, Belgium, www.certisys.eu
› Ecocert, Ecocert West Africa, Ouagadougou, Burkina Faso, www.ecocert.com
› LACON GmbH, 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
› The data is from 2018.

Contact

› Samia Maamer Belkhiria, Direction Générale de L'Agriculture Biologique (DGAB), Ministry of Agriculture and Hydraulic Resources, Tunis, Tunisia

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.
› Revisions were undertaken; some of the areas that were reported as organic agricultural land were put under wild collection.

Ukraine

Sources

› Area and operator data: Ministry for Development of Economy, Trade and Agriculture of Ukraine, Kyiv, Ukraine
› Crop data: Based on the data of four certifiers but are therefore not complete.
› 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.
› Please note that by error the correct data was not entered into the database by the time of printing. The correct number for certified organic farmland in the United Arab Emirates for 2019 was 5041 hectares.

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 (2020): Organic Market Report 2020. 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.
› Market data: Organic Trade Association (OTA), Washington D.C., USA
› Export data: Organic Trade Association (OTA), (from 2016)

Contact

› Barbara Haumann, OTA, Brattleboro VT 05301, www.ota.com

United States Virgin Islands

Certifier data.

Uruguay

Certifier data

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 data for 2018 were revised. In 2018, there were almost 51’400 hectares of agricultural land; 100’000 hectares of aquaculture and 14’450 hectares of wild collection.

Contact

› Huong Dang, Vietnam Organic Agriculture Association, Hanoi, Vietnam

Zambia

Source

› Ecocert South Africa, Stellenbosch, South Africa

Contact

› Daniël Kotzé, Ecocert South Africa, Stellenbosch, South Africa

Zimbabwe

Source

› Ecocert South Africa, Stellenbosch, South Africa

Contact

› Daniël Kotzé, Ecocert South Africa, Stellenbosch, South Africa

Note

› Please note that data from other sources (data from before 2019) 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 88: Development of the number of producers and the organic area according to the Ministry of Agriculture, Livestock and Food in Brazil

	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
Producers			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 187 countries, and 72.3 million hectares of agricultural land are managed organically by at least 3.1 million farmers. The global sales of organic food and drink reached more than 106 billion euros in 2019.

The 22nd 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 covering the area under organic management, 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, Participatory Guarantee Systems (PGS), public food procurement in the organic sector and insights into current and emerging trends in organic agriculture in Africa, Asia, Europe, Latin America, North America, and Oceania. This year's edition also includes information describing the impacts of the COVID-19 pandemic on the organic sector.

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