Join our Session

World of Organic Agriculture

17 Feb // Wednesday
16:00 - 16:45
BIOFACH eSPECIAL

Louise Luttikholt
Executive Director
// IFOAM - Organics International

World of Organic Agriculture
WEDNESDAY, FEB 17 // 16:00 - 16:45
World of Organic Agriculture

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Martina Locher
Helga Willer
Cornelia Kirchner
Amarjit Sahota
Louise Luttikholt

BIOFACH eSPECIAL
Martina Locher
Program Manager // SECO

World of Organic Agriculture
WEDNESDAY, FEB 17 // 16:00 - 16:45
Helga Willer
Department of Extension, Training and Communication - FiBL - Forschungsinstitut für biologischen Landbau

World of Organic Agriculture
WEDNESDAY, FEB 17 // 16:00 - 16:45
The World of Organic Agriculture 2021
Latest Statistics About Organic Agriculture Worldwide

Claudia Meier, Bernhard Schlatter, Jan Trávníček and Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland

The World of Organic Agriculture
BIOFACH eSPECIAL 2021, February 17, 2021, 4 pm
The World of Organic Agriculture 2021
www.organic-world.net

› The 22nd edition of 'The World of Organic Agriculture', was published by FiBL and IFOAM – Organics International in February 2021.

› Data tables
› Country and continent reports
› Markets, standards, policy support

› www.organic-world.net
Acknowledgements

Swiss State Secretariat of Economic Affairs (SECO)

IFOAM – Organics International

International Trade Centre (ITC)

Sustainability Fund of Coop Switzerland

Nürnberg Messe, the organizers of the BIOFACH World Organic Trade Fair

200 experts from all parts of the world contributed to the FiBL survey 2021
FiBL Statistics Team

Olivia Keller  Claudia Meier  Bernhard Schlatter  Jan Trávníček  Helga Willer  Julia Lernoud
Transnational data collection efforts

eurostat

CIAO
Comisión Interamericana de Agricultura Orgánica

SPC
Secretariat of the Pacific Community

MOAN
Mediterranean Organic Agriculture Network

FiBL
IFOAM Organics International
International certifiers that provided data for several countries
Key data 2019

- Organic agricultural land reached **72.3 million** hectares
- Area growth: **1.1 million hectares more** than in 2018, **1.6 percent increase**
- Area increase mainly due to **additional 0.9 million hectares in Europe**
- **1.5 percent** of the agricultural land is organic
- In 16 countries 10 percent or more of the farmland is organic
- **3.1 million producers** were reported
- 187 countries with organic activities
- Almost 35 million hectares of non-agricultural areas
The ten countries with the largest organic farmland areas 2019

The ten countries with the largest areas of organic agricultural land 2019

Source: FiBL survey 2021

- Australia: 35.69
- Argentina: 3.67
- Spain: 2.35
- USA: 2.33
- India: 2.30
- France: 2.24
- China: 2.22
- Uruguay: 2.14
- Italy: 1.99
- Germany: 1.61
Distribution of organic agricultural land by region 2019

Source: FiBL survey 2021

- Oceania: 50%
- Europe: 23%
- Latin America: 12%
- Asia: 8%
- North America: 5%
- Africa: 3%
Countries with an organic share of at least 10 percent of the agricultural land 2019

Source: FiBL survey 2021

<table>
<thead>
<tr>
<th>Country</th>
<th>Share of total agricultural land</th>
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<tbody>
<tr>
<td>Liechtenstein</td>
<td>41.0%</td>
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<tr>
<td>Austria</td>
<td>26.1%</td>
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<td>Sao Tome and Principe</td>
<td>24.9%</td>
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<td>Estonia</td>
<td>22.3%</td>
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<td>Switzerland</td>
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<td>Czech Republic</td>
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<td>Finland</td>
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<td>French Guiana (France)</td>
<td>11.3%</td>
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<td>Denmark</td>
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<td>Slovenia</td>
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<td>Slovakia</td>
<td>10.3%</td>
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Growth of the organic agricultural land and organic share 1999-2019

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

17 February 2021
Growth of the organic agricultural land by continent 2011-2019

Source: FiBL-IFOAM survey 2012-2021
ORGANIC PRODUCERS 2019

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

More than 91% of the producers are in Asia, Africa, and Europe.

There has been an increase in the number of producers by 1.564,524 or over 100% over the past decade.

The five countries with the most organic producers 2019

Distribution of organic producers by region 2019

Development of the number of organic producers 1999-2019

Organic Imports to the European Union 2019

Importing countries (imports in metric tons)

Exporting countries (exports in metric tons)

The development of total organic imports to the European Union 2019 in metric tons

FiBL survey based on national data sources and Eurostat: https://statistics.fibl.org
Factors influencing future growth

Climate change
- Pacific Islands: "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."
- Australia: Bush fires: “Australian communities are still reeling over this disaster, with many operators still 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”

COVID-19
- Increase of demand for organic in many countries in 2020 (US, Europe), production needs to keep pace.
- Asia: Local governments have started responding to demands to support organic agriculture and sustainable food systems, especially during the COVID-19 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.
- PGS: «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.”
- Revised EU regulation on organic farming: “Due to many reasons, including the COVID-19 pandemic, its application was postponed by one year to 01 January 2022.”

Support measures
- European Union: Green Deal/Farm-to-Fork: 25% Organic by 2025
- Asian countries: Local and national support measures

Organic food procurement/food service
- Increase of organic food procurement in all continents
Conclusions

- The **organic area grew at a slower pace** than in the years before 2019, while the **market faster**.
- In Europe, **area grew the most in absolute terms** (almost **1 million** hectare more), thus **increasing the domestic supply**, while **import to the European Union remained stable**.
- Future growth is expected to be influenced by the effects of **climate change**, the **COVID-19 pandemic**, **support measures** and increased interest in **organic food procurement**.
- Data collection has become more challenging as FiBL is collecting data for more and more countries directly from the certifiers which adds to the complexity of the process.
- We need locally established, good data collection systems for better data, better data access, access to visual data and linking data is needed for policy makers, market actors and researchers.
The World of Organic Agriculture 2019

**Organic Farmland 2019**
- 72.3 m ha
- Organic farmland in million hectares
- From 2018
- 187 Countries with organic farming

**Organic Producers 2019**
- The number of organic producers is increasing
- 3.1 million Organic farmers
- +13% From 2018

**Organic Market 2019**
- The global market is growing and consumer demand is increasing
- Over 106 Global organic food market in billion euros

**Top 3 countries (market in billion euros)**
- USA: 44.7
- Germany: 12.0
- France: 11.3

**Number of producers: Top 3 countries**
- 1,366,226
- Australia: 35.7
- India: 210,353
- France: 203,602
- Argentina: 3.6
- Uganda: 13.4% Organic market growth
- Spain: 2.4
- Ethiopia: 12.1% Market share
- 344 € Highest per capita spending is in Denmark

Source: FiBL survey based on national sources
© FiBL 2021
More information: www.organicworld.net - statistics.fibl.org
Resources

- Slides and infographics at www.organic-world.net
- Twitter.com/fiblstatistics
- Interactive data tables at statistics.fibl.org
- Interactive data visualisations at statistics.fibl.org
- Interactive map at www.ifoam-eu.org
Thank you very much for your attention!

North America
3.3 million ha
22'153 producers

Europe
16.5 million ha
430'472 producers

Asia
5.9 million ha
1'589'563 producers

Latin America
8.5 million ha
224'338 producers

Africa
2.0 million ha
850'490 producers

Oceania
36.0 million ha
22'153 producers
FiBL Statistics - European and global organic farming statistics

On Statistics.FiBL.org, the Research Institute of Organic Agriculture FiBL provides access to the data collected in the framework of its annual survey on organic agriculture worldwide. This website is a supplement to FiBL's / Organic-World.net website, which hosts the statistical yearbook / The World of Organic Agriculture and contains country and background information on organic farming worldwide.

Announcements

- February 17, 2021, 4 to 4:45 pm: The World of Organic Agriculture at the BIOFACH eSPECIAL
- February 17, 2021, 5 to 6 pm: The European Market for Organic Food at the BIOFACH eSPECIAL
- February 18, 2021, 2 to 3:30 pm: Global Organic Market Overview at BIOFACH eSPECIAL

More news on / Organic-World.net

Follow us on Twitter
For latest news follow FiBL Statistics on Twitter / @fiblstats

Work in progress
Please note that work on this website is in progress. If you have any questions and suggestions, please let us know and send an e-mail to helpdesk@fibl.org.
The World of Organic Agriculture
Discover the new statistics in the organic sector, global market development and trends.

Louise Luttikholt, Andrés González, Barbara Jäggi, Cornelia Kirchner, Amarjit Sahota, Helga Willer

Online: Wednesday, 17/02/2021, 16:00-16:45

Table of contents of our yearbook "The World of Organic Agriculture" now online - you can look forward to the latest data many interesting articles including information on COVID-19 and its effects on the organic sector. organic-world.net/yearbook/yearb...
Cornelia Kirchner
Senior Guarantee and Policy Coordinator
// IFOAM - Organics International

World of Organic Agriculture
WEDNESDAY, FEB 17 // 16:00 - 16:45
Current situation

- 72 countries with fully implemented organic regulations.
- 22 countries with regulations that are not fully implemented.
- 14 countries in the process of drafting legislation.
Countries with an organic regulation
Important developments in 2020


• The US launched revision of the USDA organic regulation. Main goal is to strengthen oversight and enforcement in the organic supply chain.

• With Brexit completed, the UK is entering as a new player into the scene of trade agreement negotiations.

• Taiwan signed 5 new bilateral equivalency agreements.

• US decided to terminate recognition of India’s organic control system.

• Number of countries that include recognition of PGS in their regulations continues to increase (new: Madagascar, Peru, Philippines)
Countries recognizing PGS in their regulation
Organic Equivalence Arrangements
## Equivalence tracker

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**Bilateral Equivalence**

**Unilateral Equivalence - Beneficiary**

**Unilateral Equivalence - Grantor**

**Unilateral Recognition of Conformity Assessment only - Beneficiary**

**Unilateral Recognition of Conformity Assessment only - Grantor**

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***Agreement about to expire/be terminated***

**Includes all EA full members (European Cooperation for Accreditation)**

* Under a general trade agreement
The IFOAM Family of Standards

That’s Organic - Worldwide.

GLOBAL
IFOAM Standard
- International Standard for Forest Garden Products (FGP)
- Biocyclic Vegan Standard

AFRICA
- East African Organic Products Standard
- Tunisia Organic Regulation
- FENAB Standard, Senegal
- The SAGISO Standard, South Africa

ASIA
- Asian Regional Organic Standard
- ASEAN Standard for Organic Agriculture
- Saudi Arabia Organic Regulation
- India Organic Regulation
- Israel Organic Regulation

OCEANIA
- National Standard for Organic and Biological Produce, Australia
- New Zealand Organic Export Regulations
- Pacific Organic Standard, Pacific Community

EUROPE
- EU Organic Regulation
- Switzerland Organic Regulation
- Turkey Organic Regulation
- Bio Suisse Standards, Switzerland
- Nature & Progrès Standards, France
- The EcoWellness Standard, Germany

THE AMERICAS
- Argentine Organic Regulation
- Canada Organic Regulation
- Costa Rica Organic Regulation
- Ecuador Organic Regulation

THE FAMILY OF STANDARDS
contains all standards officially endorsed as organic by the Organic Movement, based on their equivalence with the Common Objectives and Requirements of Organic Standards. Both private standards and government regulations are admissible.

www.ifoam.bio/ogs

Note: Applicant standards are marked in grey.

Click on each standard to see more details.
Best viewed with Adobe Reader
Countries whose standards are recognized in the IFOAM Family of Standards
BIOFACH eSPECIAL

Amarjit Sahota
Founder and Director
// Ecovia Intelligence

World of Organic Agriculture
WEDNESDAY, FEB 17 // 16:00 - 16:45
Global Organic Food & Drink Market

by

Mr. Amarjit Sahota
Business services

i. Market & Technical Research

ii. Business & Sustainability Consulting

iii. Seminars, Workshops

iv. Sustainable Foods Summit

(Europe, North & Latin America, Asia-Pacific)

www.ecoviaint.com
Market growth

- 2000: $18bn
- 2008: $51bn
- 2013: $72bn
- 2019: $112bn

Legend:
- Europe
- NA
- Asia
- Others
COVID-19 impacts: market & consumers

- High demand from food retailers
- CFS sector closures
- Rise in online retailing
- Strengthening consumer demand
- Decreasing consumer spending power
- Changing buyer behaviour
Industry challenges
Eco-label proliferation
Multiple labels
Plant-based foods
Plant-based foods

**Google searches for veganism**

Popularity for search term "veganism", dated June of each year

- UK search interest ranking
- Worldwide search interest ranking

Source: Google Trends
Plant-based foods

People give a variety of reasons for eating less meat
% of respondents citing each reason (more than one could be given)

- People interested in cutting down meat consumption
- Non-meat eaters

- Health
- Weight management
- Animal welfare
- Environment
- Concerns over antibiotics
- Taste

Note: Survey of 1,040 British adults. Source: Lightspeed/Mintel
Thank You!

More Information
Market research, analysis & consulting
Free newsletter…

www.ecoviaint.com
FROM ITS ROOTS, ORGANIC INSPIRES LIFE

Organic World Congress 2021

6-10 SEPTEMBER 2021
RENNES, FRANCE

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https://owc.ifoam.bio/
We are leading change, organically!

Together with our members in over 100 countries and territories as well as regional bodies and sector platforms. We inspire change.

Why not join us?  
Go to: https://ifo.am/Join
Thank you

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