IFOAM ORGANICS INTERNATIONAL

Tue
14 Feb
13:30-15:00

Global Organic Market Overview

BIOFACH
into organic

St. Petersburg
(NCC Ost)

Our Sessions

Join us at the BIOFACH Congress, where we will organise some sessions but participate in many more!

BIOFACH
into organic

Visit our booth

13-16 February
Nuremberg, Germany

Hall 3A-517

13 Feb

17:15 - 18:00
Women Leading Transformation in Central East Europe's Organic Sector

14 Feb

11:15 - 12:15
Navigating social justice in organic supply chains

13:30 - 15:00
Global organic market overview

16:45 - 18:00
Women change-makers in Africa

15 Feb

10:00 - 11:00
True costs for women in organic farming including financial literacy as strongest scarcity in organics

11:30 - 12:30
The power of Bio-Districts and the women shaping their success!

13:00 - 13:45
PGS as a resilient concept for women

16 Feb

11:15 - 12:15
National policies bringing about an organic breakthrough

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Research Institute of Organic Agriculture FiBL
info.suisse@fibl.org | www.fibl.org




The World of Organic Agriculture 2024
Latest Statistics About Organic Agriculture Worldwide

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

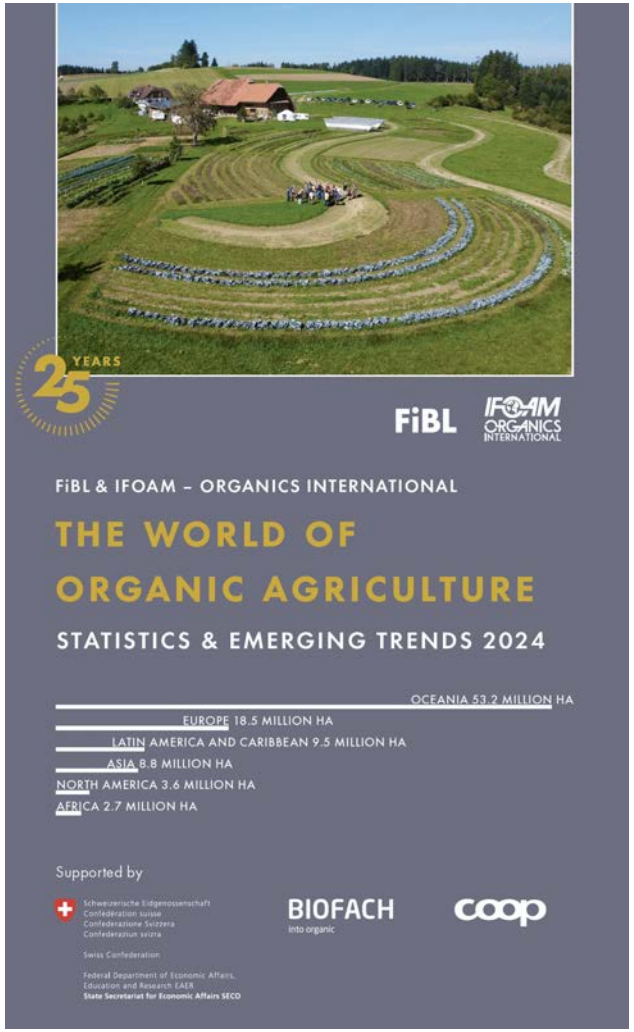
The Global Market for Organic Food, BIOFACH Congress 2024

February 13, 2024

The World of Organic Agriculture 2024

- The 25th edition of «The World of Organic Agriculture», was published by FiBL and IFOAM – Organics International in February 2024.
- Data tables
- Country and continent reports
- Markets, standards, policy support
- The book can be ordered or downloaded at (item number 1747): https://www.fibl.org/en/shop-en

- www.organic-world.net
- https://statistics.fibl.org



Schweizerische Eidgenossenschaft
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Swiss Confederation

Federal Departement of Economic Affairs, Education and Research EAER
State Secretariat for Economic Affairs SECO

coop

BIOFACH into organic

IFOAM ORGANICS INTERNATIONAL

More than 200 experts from all parts of the world contributed to the survey 2024.

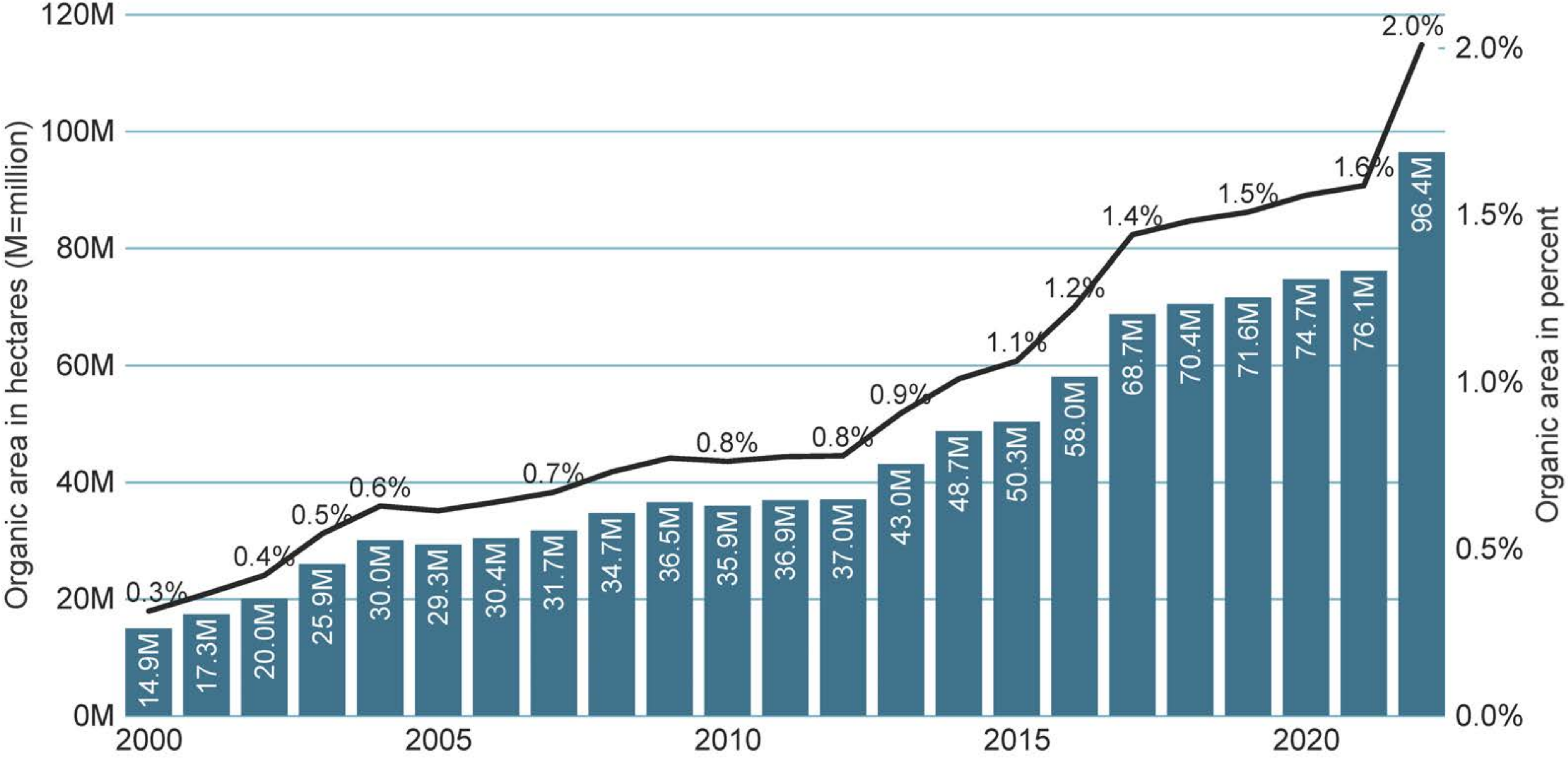
FiBL IFOAM ORGANICS INTERNATIONAL

Highlights 2022

- **Organic farmland** worldwide grew at an unprecedented rate.
- **EU organic farmland** reached a share of over 10% - a milestone.
- **The number of organic farms** worldwide grew strongly.
- **Organic imports**:
  - EU: Slight decrease
  - USA: Increase
- **Market development**
  - A two-year comparison on a global scale is not possible due to strong exchange rate fluctuations between the Euro and US Dollar.
  - Slight decrease in Europe and the EU.
  - Increases in other parts of the world.
- **Out-of-home consumption**: Increases in Europe.

World: Growth of organic agricultural land and organic share 2000 - 2022

Source: FiBL-IFOAM-SOEL surveys 2001-2024

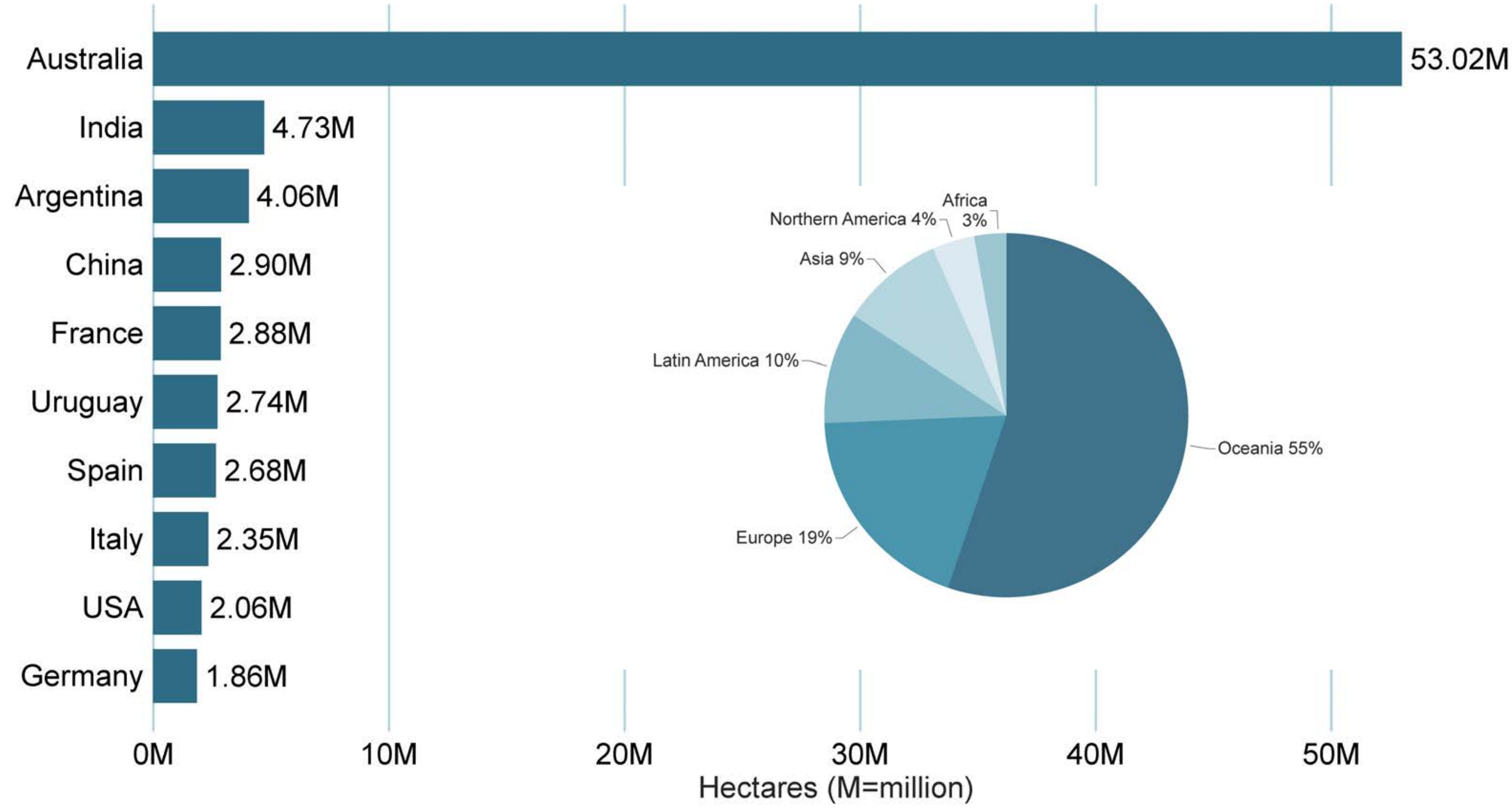


Organic farmland 2022: 96.4 million hectares or 26.6% more than in 2021.

Growth in all regions/ continents

World: The ten countries with the largest areas of organic agricultural land 2022

Source: FiBL survey 2024

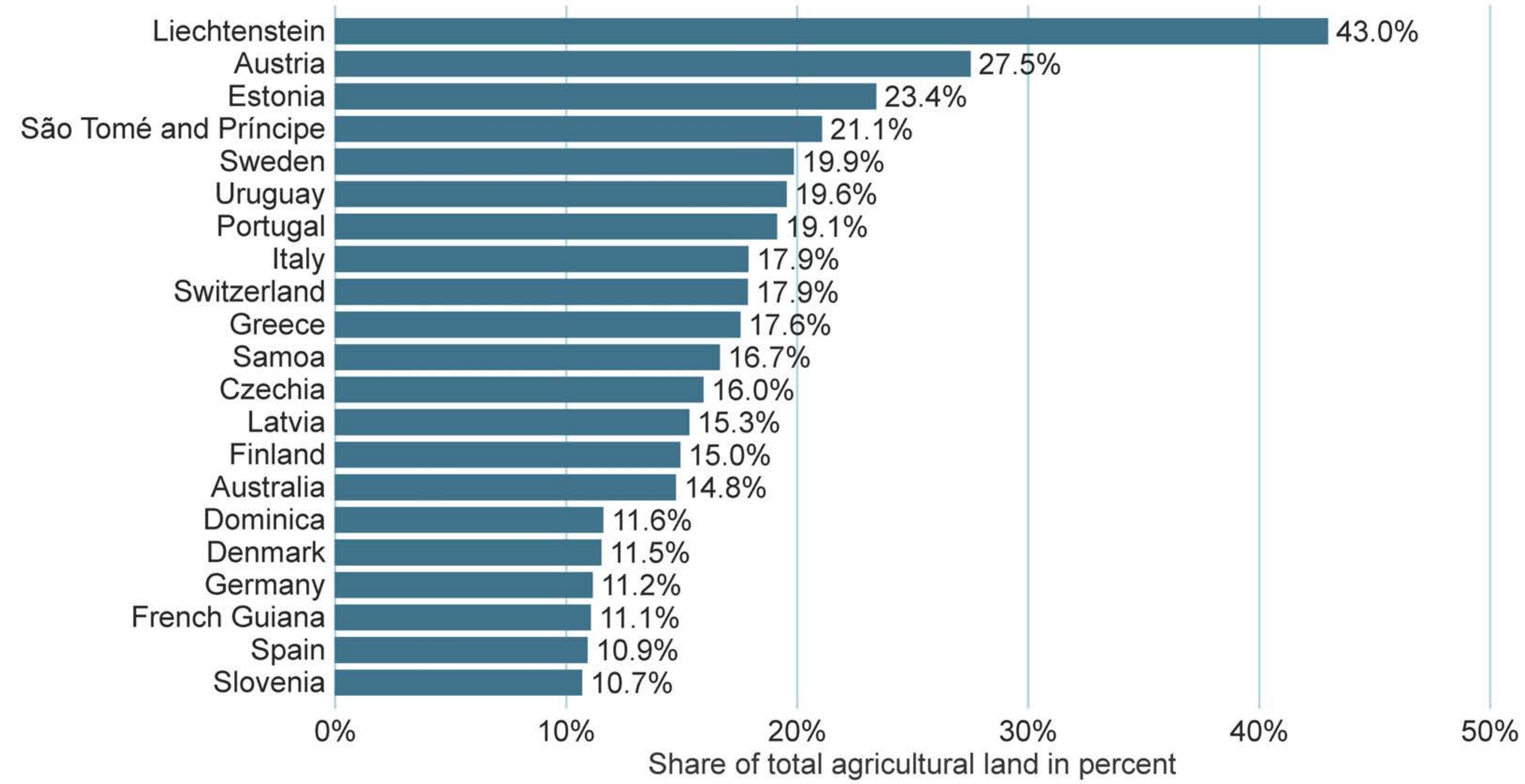


Organic farmland 2022: 96.4 million hectares or 26.6% more than in 2021.

- **Largest increase in Australia; mainly extensive grazing areas, some of which had not been reported before.**
- **India is the new number 2, organic farmland almost doubled.**
- **With the exception of the US, in all top 10 countries organic farmland increased.**

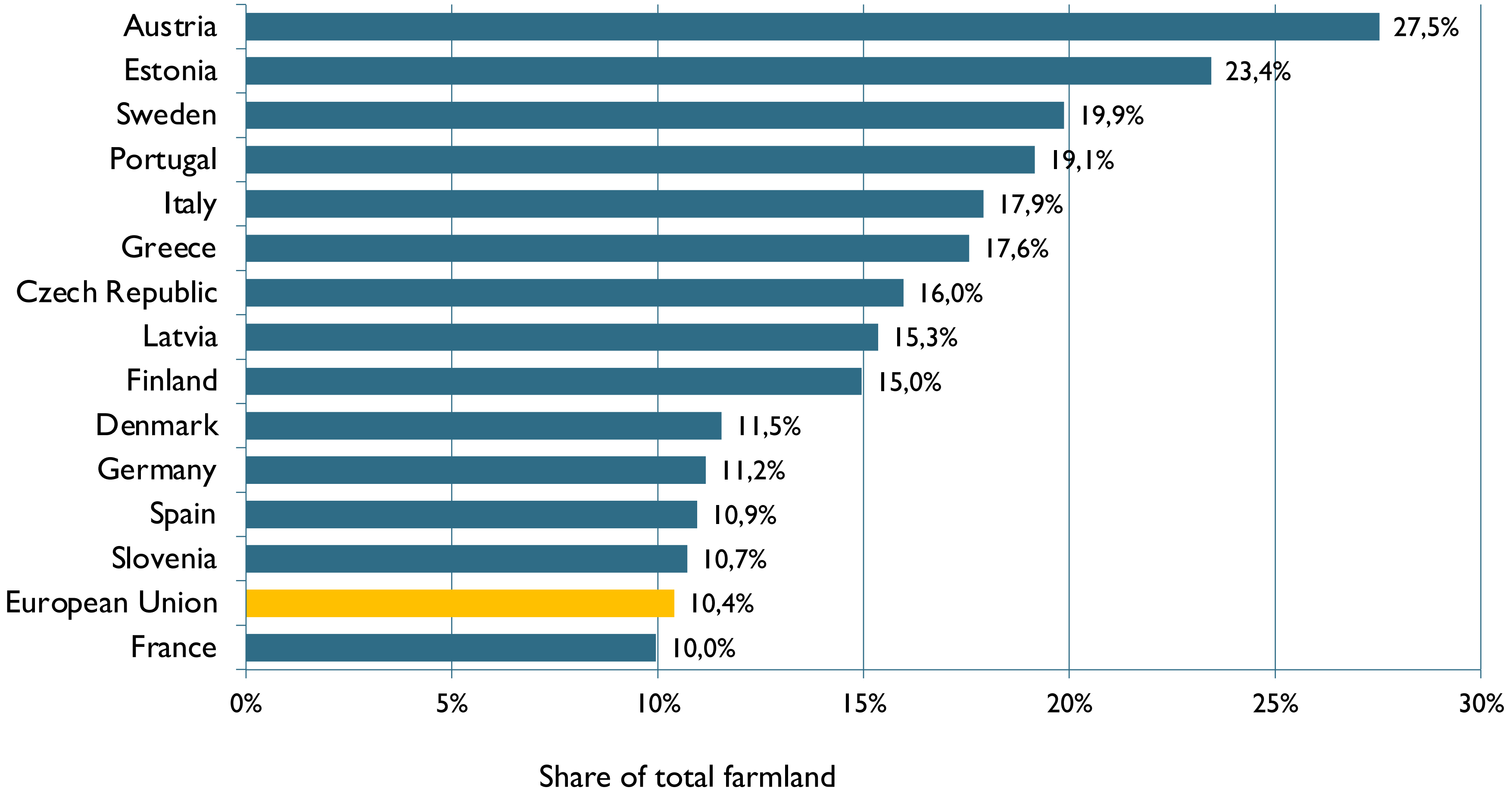
World: Countries with an organic share of the total agricultural land of at least 10 percent 2022

Source: FiBL survey 2024



European Union: Countries with an organic area share of 10 % and more

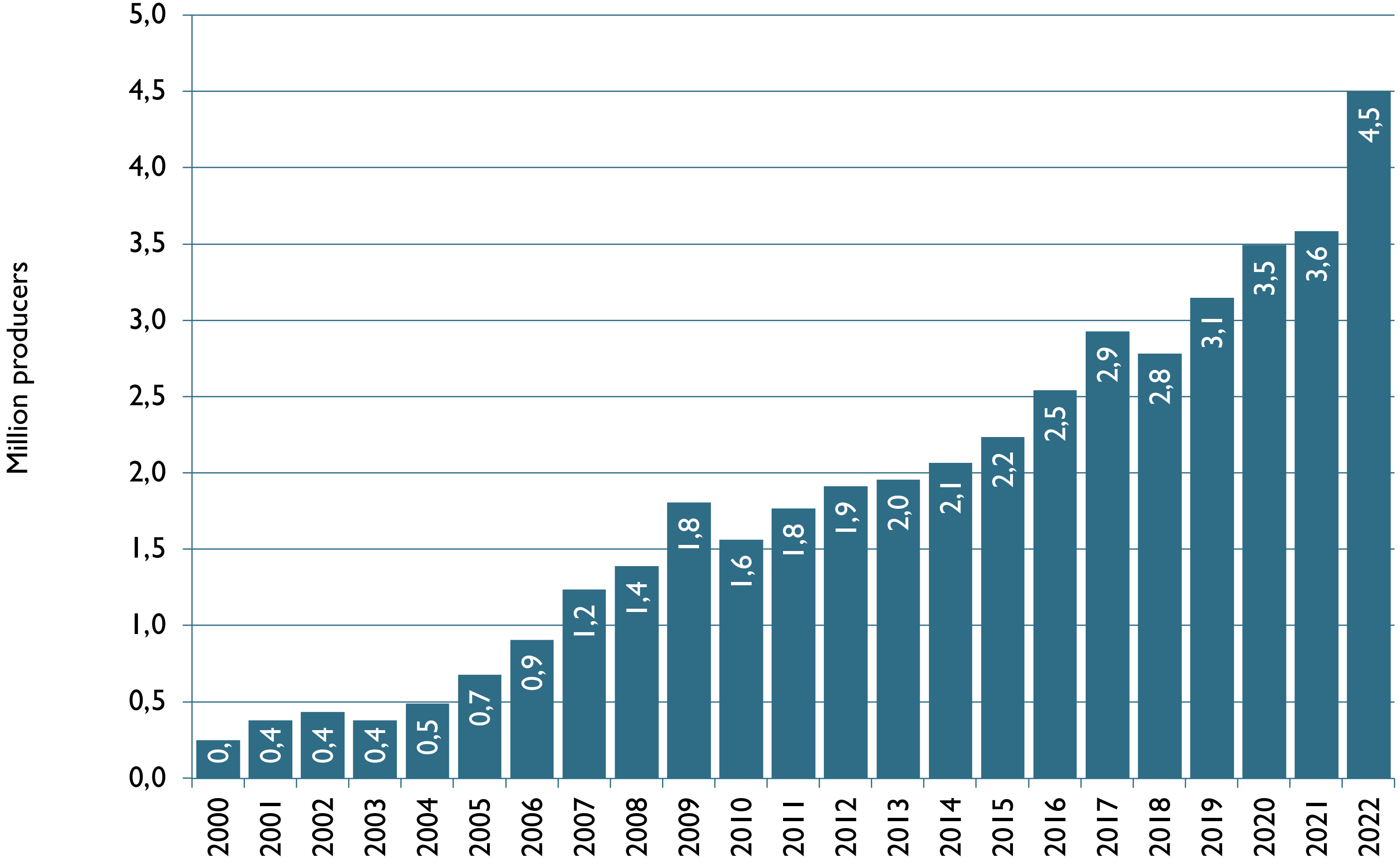
Quelle: FiBL AMI survey 2024, based on national data sources and Eurostat



European Union: Countries with an organic area share of at least 10%

Growth of organic producers 2000-2022

Source: FiBL survey 2024



Organic Farms Worldwide: 4.5 million

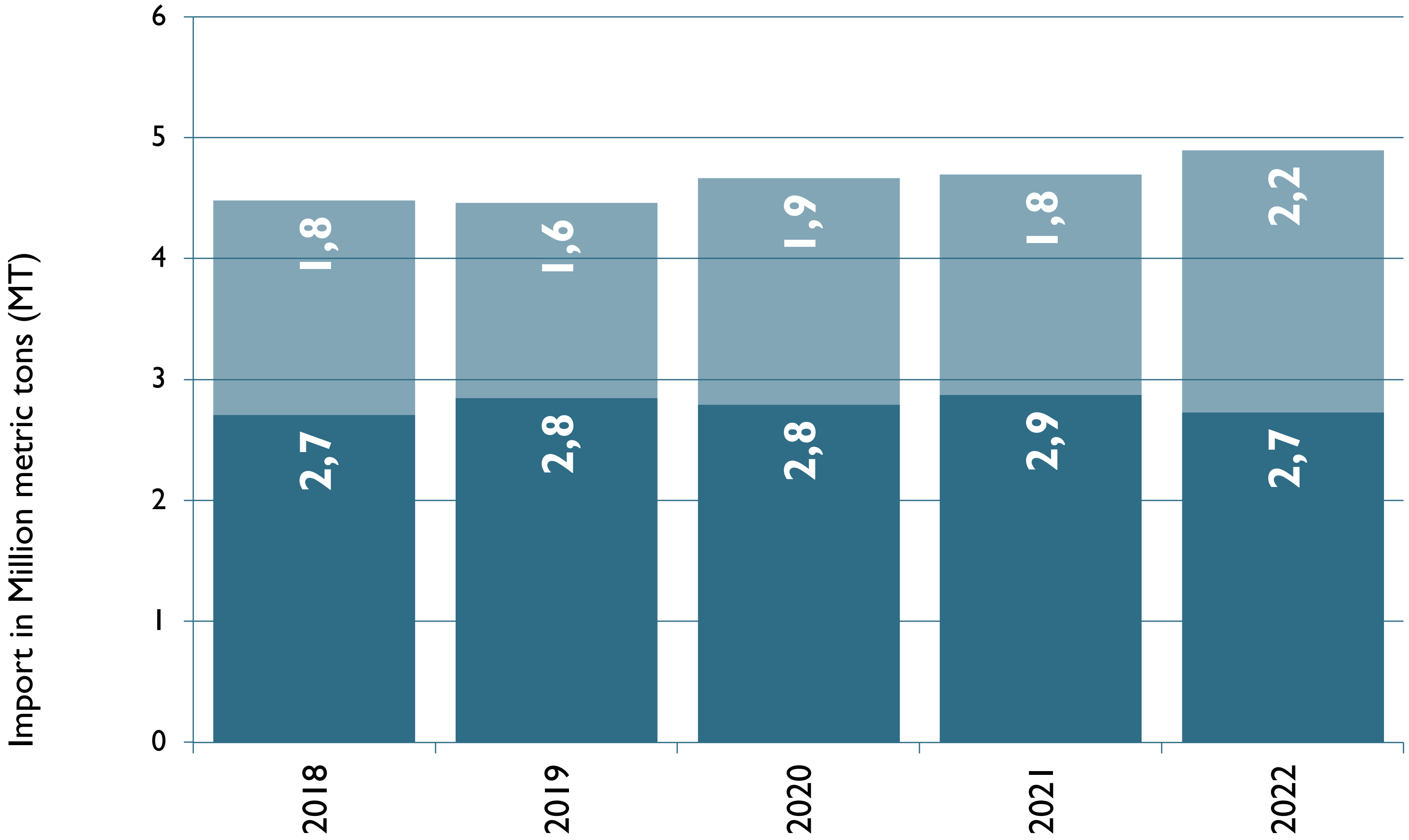
Growth 2021/2022: +25.6%, +900,000

Largest increases (>10'000)
- **India: +880,000**
- **Thailand: +48,000**
- **Democratic Republic of the Congo: +23,000**
- **Greece: +23,000**
- **Kenya: +20,000**

Decline in Tanzania

Growth of organic producers 2000-2022

Development of EU and US organic imports 2018-2022
Source: EU/TRACES, USDA GATS



US Organic Imports: Not all products are included, e.g., cocoa, oilseeds (except soybeans)

Total EU and US imports: 4.9 million metric tons, up from 4.7 million

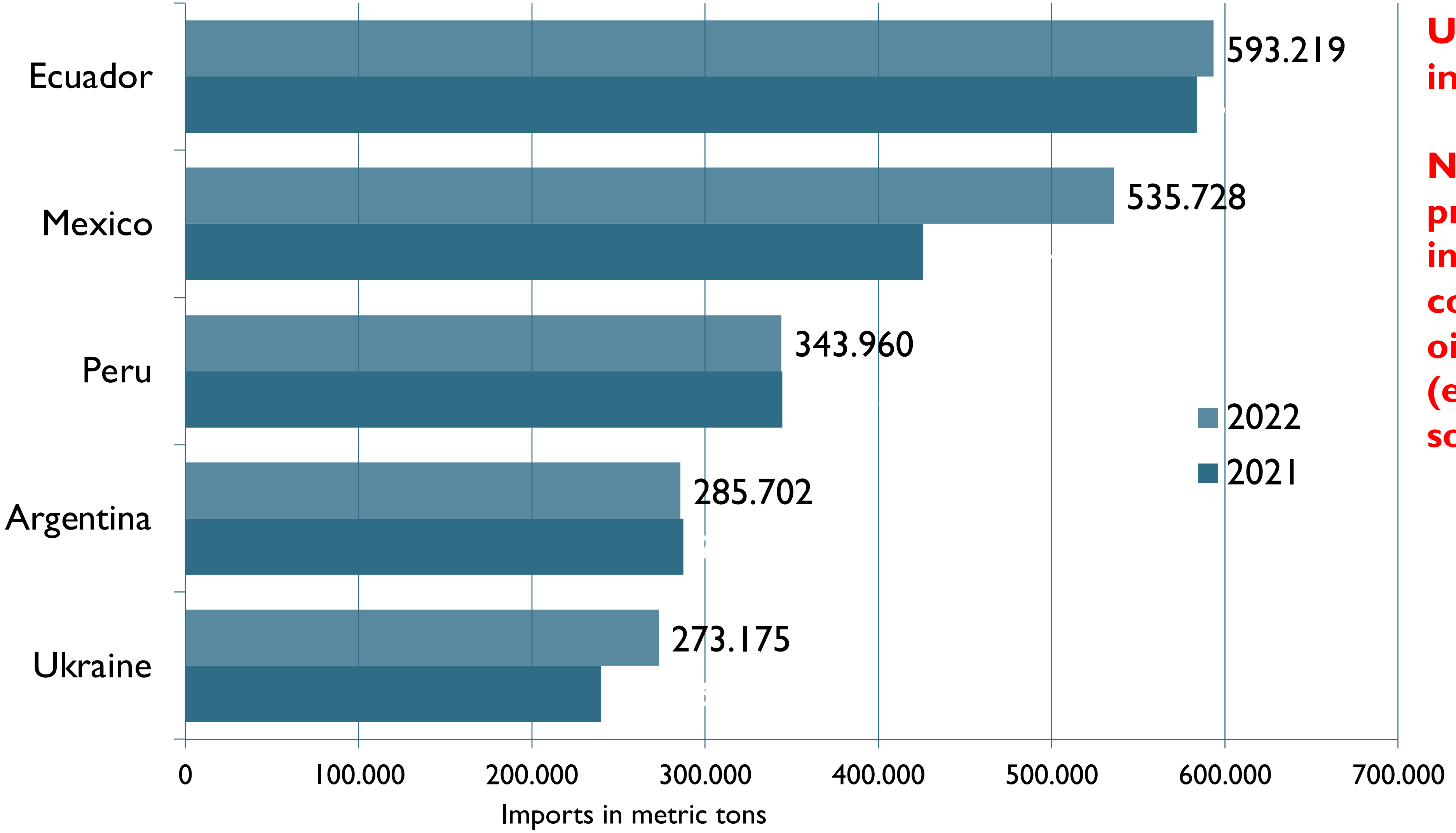
Top exporters to the EU: Ecuador, Dominican Republic, Ukraine

Top product groups: Tropical fruits, oils, oil cakes, oilseeds

Development of EU and US organic imports

EU and US combined organic imports 2021 and 2022 compared

Source: EU/TRACES, USDA GATS

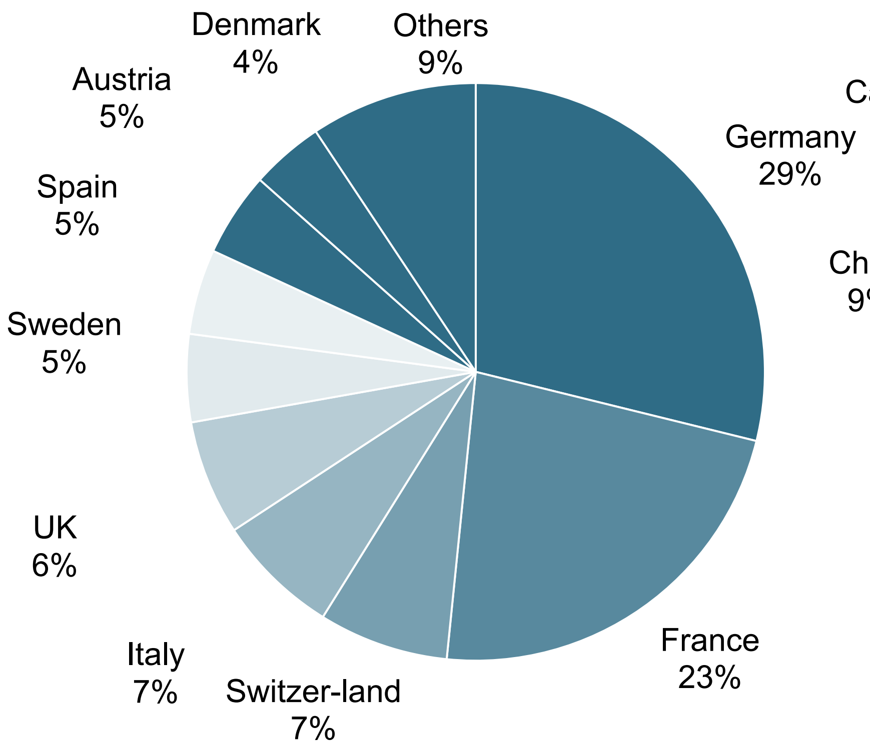


US organic imports:

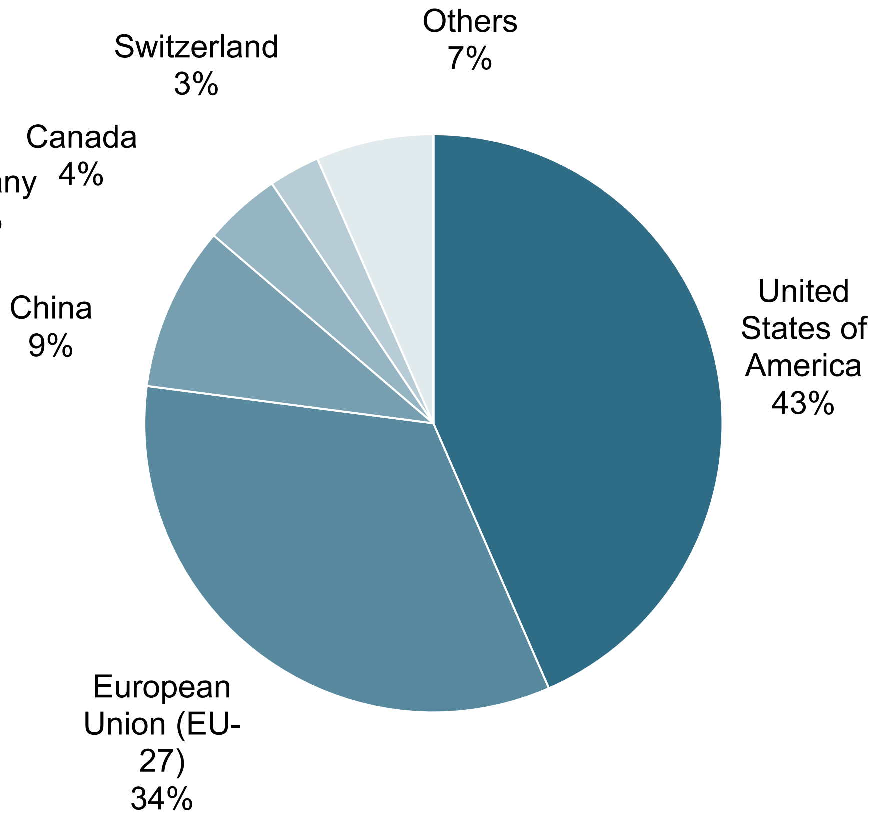
Not all products are included; e.g., cocoa, oilseeds (except soybeans)

EU and US organic imports: Top exporters

Europe: Distribution of retail sales by country 2022
Source: FiBL-AMI survey 2024



World: Retail sales by single market 2022
Source: FiBL-AMI survey 2024

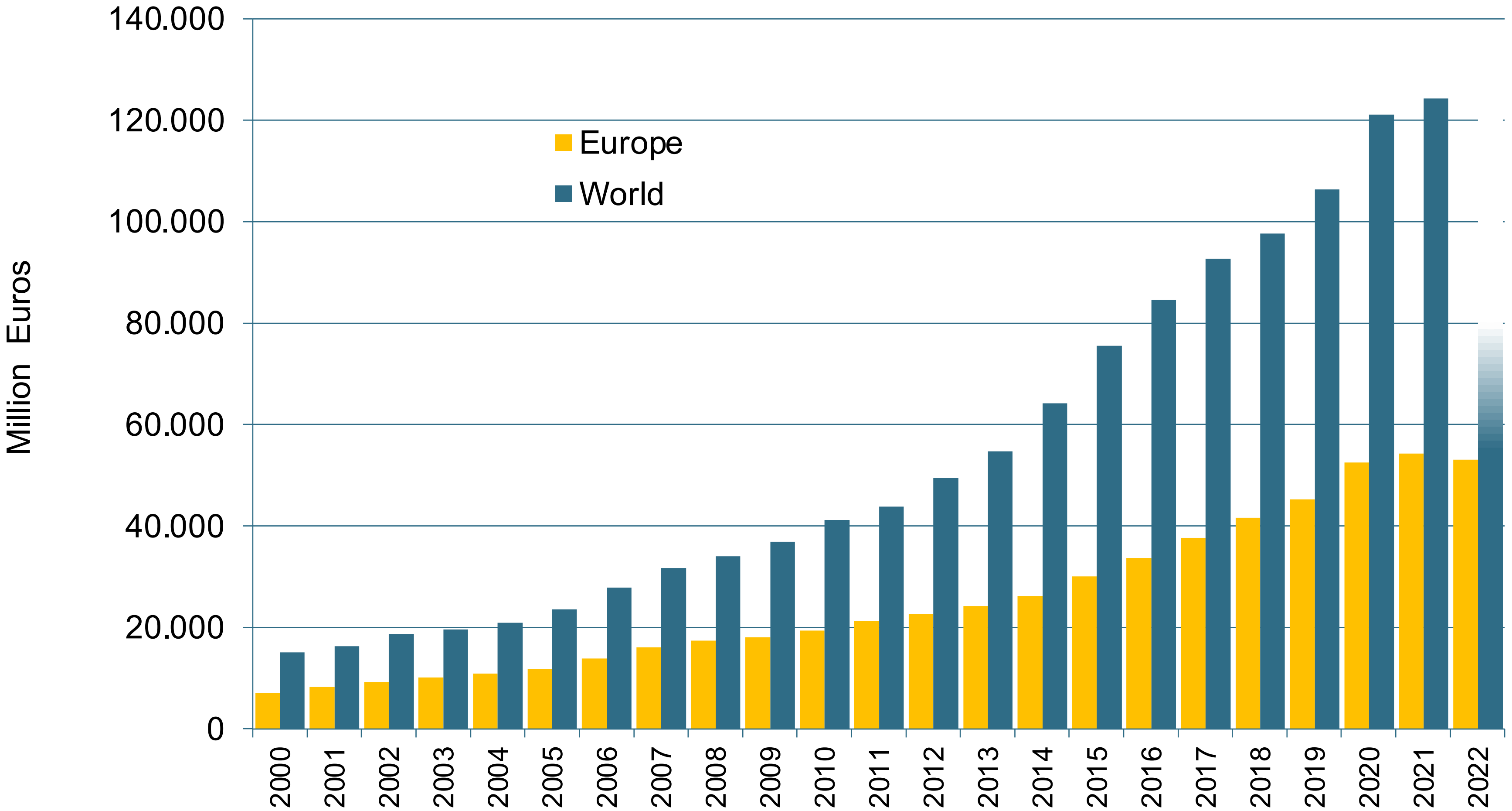


Consider currency fluctuations!

Distribution of retail sales in Europe and worldwide

European and global retail sales growth 2000-2022

Source: FiBL surveys 2004-2024

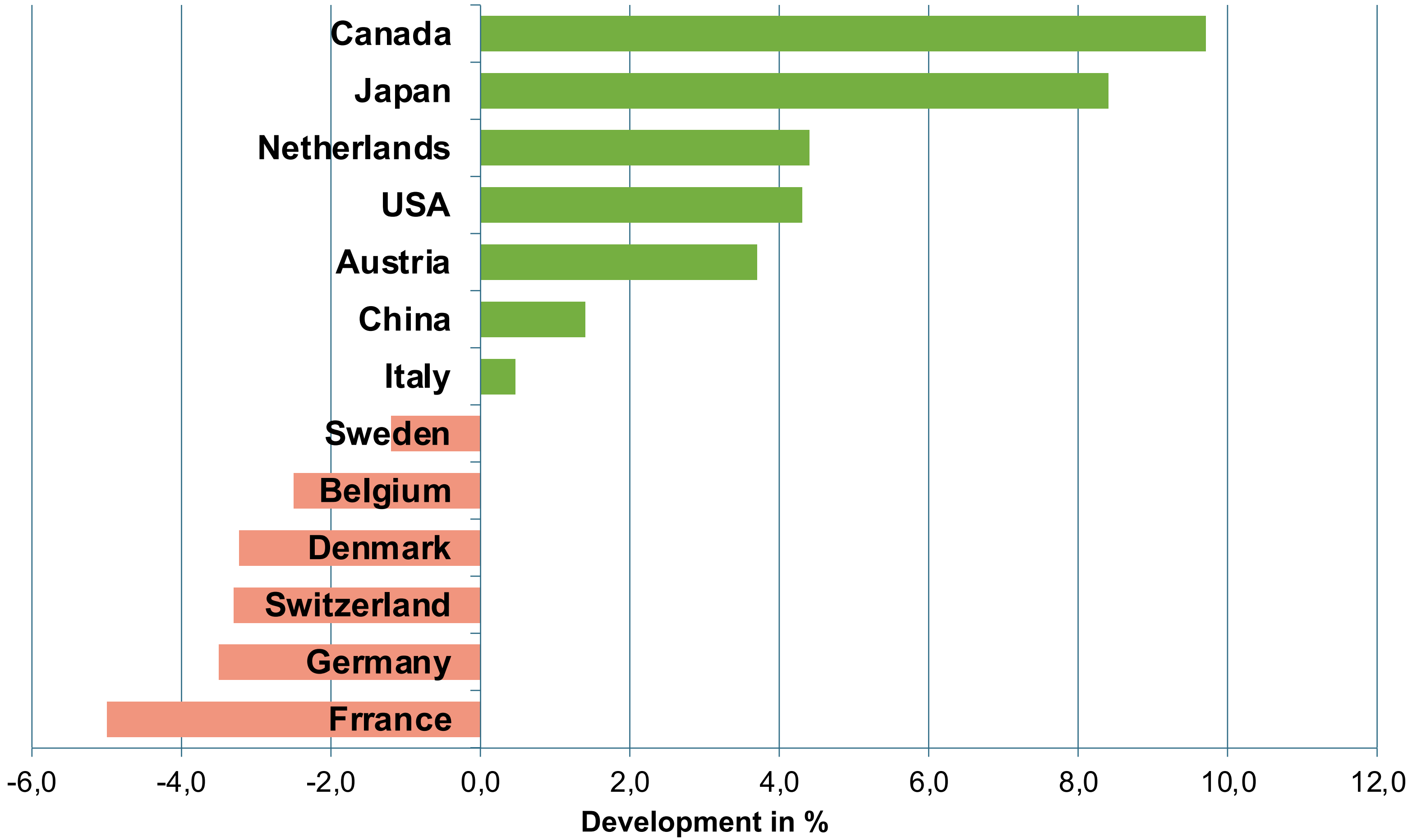


Consider currency fluctuations!

European and global retail sales growth 2000-2022

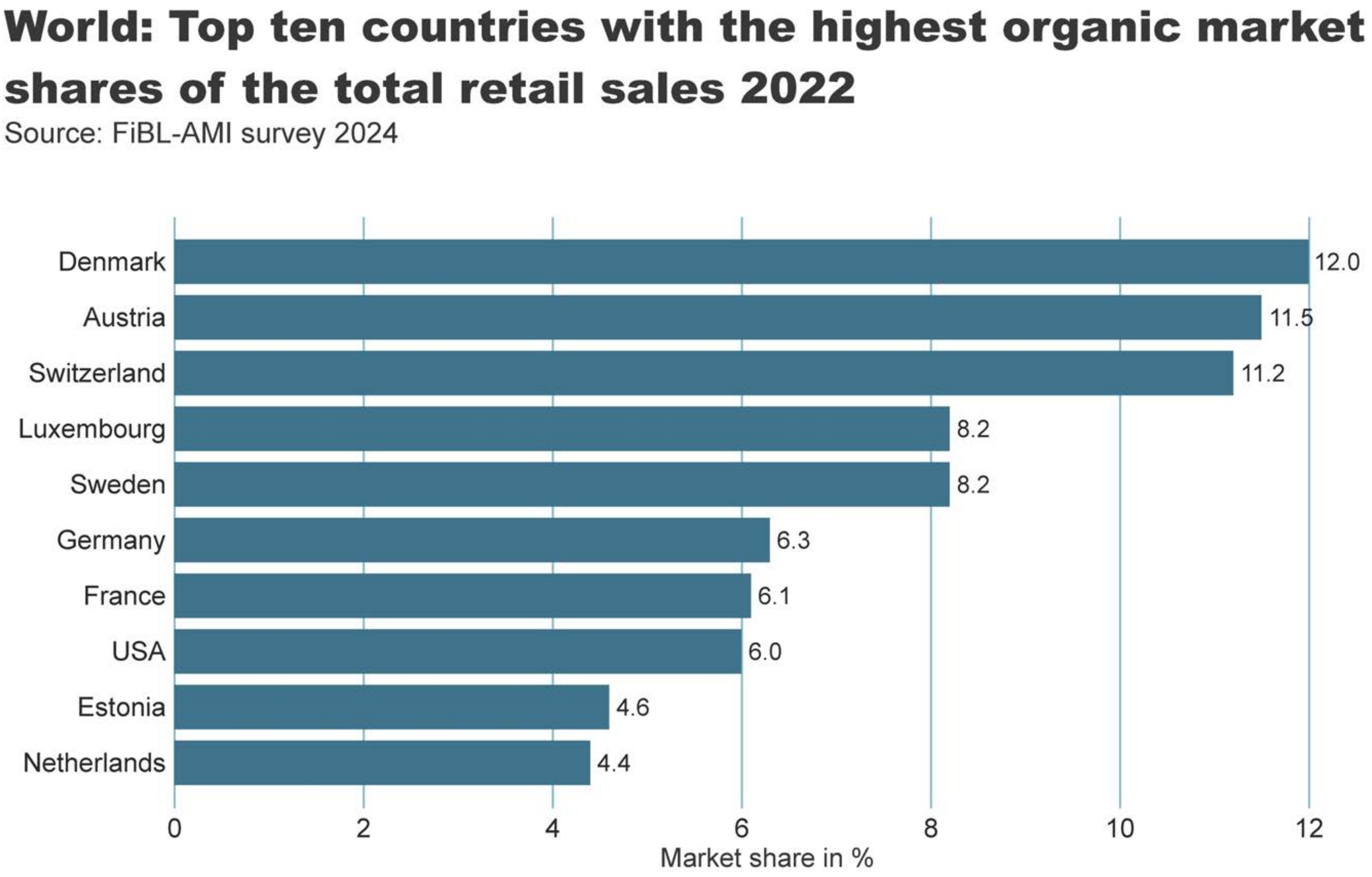
Development of organic retail sales in select countries 2021/2022

Source: FiBL AMI survey 2024



Growth calculated in original/national currency!

Development of organic retail sales in select countries



European organic market shares are the highest in the world !

The countries with the highest organic retail sales shares

Summary

- In 2022, the global organic farming area experienced significant growth, albeit slower in Europe compared to 2021.
- Within the EU, the organic farming area surpassed the 10% mark for the first time.
- The number of organic farms increased dramatically worldwide, exceeding 4.5 million.
- Organic imports into the EU decreased in 2022, whereas they increased in the USA.
- The global organic market reached almost 135 billion euros. While retail sales declined in some European countries, they increased in North America and larger Asian markets.
- The highest organic retail sales share continued to be in Europe.
- In European countries, food service sales increased.

Key Figures for Global Organic Agriculture 2022:

- **96.4 million hectares of organic farming area (2%); +26.6% growth**
- **4.5 million organic farms, +25.6% growth**
- **4.9 million tons of organic products exported to the EU and USA, +4.4%**

FiBL

Statistics Sessions at BIOFACH 2024

- 13 February, 3:45-4.45 PM:
  The World of Organic Agriculture
- 13 February, 5.00-6.00 PM:
  The European market for organic food
- 14 February, 1:30-3:00 PM:
  Global Organic Market Overview
- 14 February, from 4:00 PM:
  Reception at the FiBL Stand (Hall 3A, 509)

www.organic-world.net

FiBL

25 YEARS

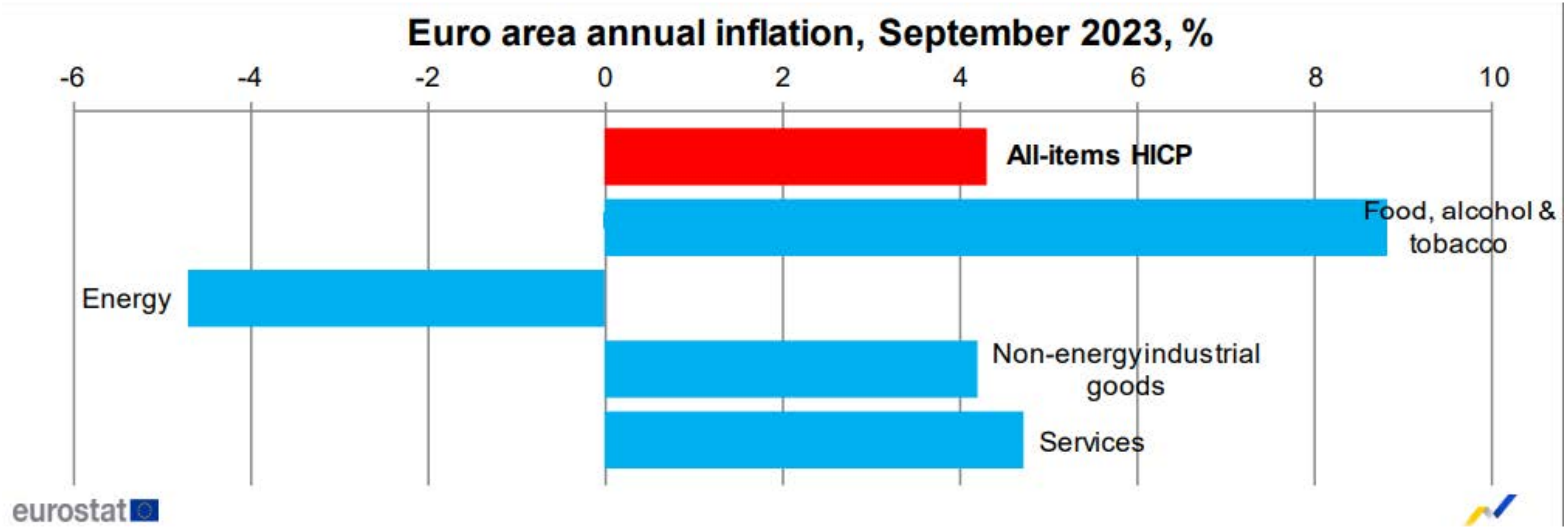
Trends of the EU organic market

Eric Gall, deputy director, IFOAM Organics Europe

Biofach, 14.02.2024

IFOAM ORGANICS EUROPE

Geo-political situation has led to inflation



Euro area inflation at 4.3% in September 2023 (10% September 2022), down from 5.2% in August 2023. Food, alcohol & tobacco still expected to have the highest annual rate : +8.8% compared with 9.7% in August (11.9% in September 2022).

Source: https://ec.europa.eu/eurostat/documents/2995521/17599940/2-29092023-AP-EN.pdf/0b9816d1-8250-6b6b-6269-7658e3191c6b?version=1.0&t=1695938305389

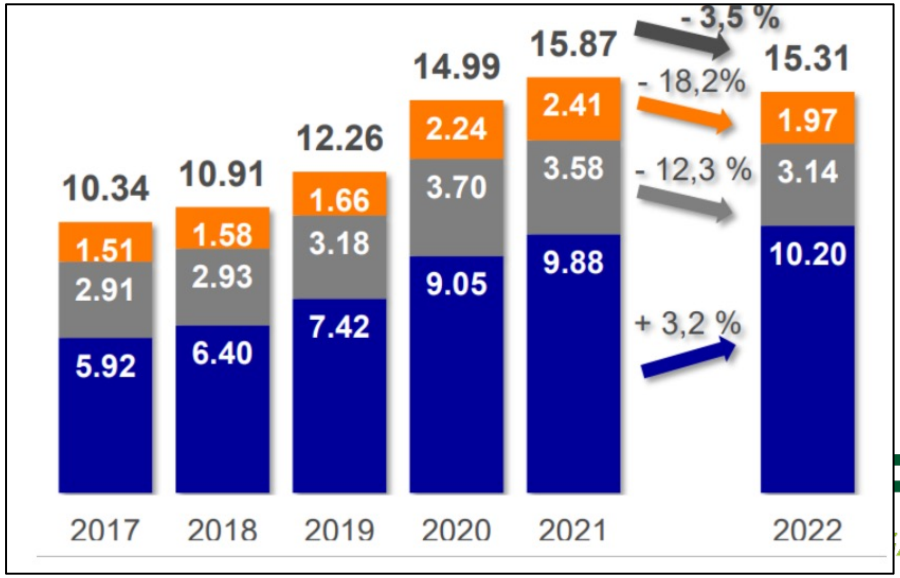
A contrasted market situation in Europe

- The market is stable or increasing in some countries (e.g. Austria, Switzerland), is recovering after a decrease (e.g. Germany, Denmark) or has reduced in the last two years (e.g. France)
- **Austria**: a stable organic market
  - Organic sales value increased by +5.8% the first half of 2023 compared with same period in 2022
  - The organic share of sales in supermarket continues its increase 2023.
  - Organic deflation - Same share in % for the first half of 2023 while volumes are increasing.

Germany: a "stagnant" 2022 with a recovery in 2023

- Organic sales in Germany in 2022 were 25% above the pre-Covid year 2019 and 3.5% below 2021. 2022 still exceeded 2019 levels

- Food retailers and discounters increased their share of organic



A contrasted market situation in Europe

France

- In 2022, **89.030 organic operators**
  - The organic sector continue to develop in France: **+3.5% additional producers**, **+2.7% organic land**.
  - Maintain and generate **more than 200.000 jobs.**
- In the first half of 2023, the market declined overall by 2.7% compared to the first half of 2022, whereas it had fallen by 4.6% in 2022 vs. 2021.
- Organic sales loss in supermarkets (-4.6%) and specialized shops (-8.6%), increase in direct sales (+3.9%)
  - Supermarkets reduce their offer of organic products.
- As with the vast majority of quality and environmental labels, organic has seen a significant drop in interest for consumers compared to 2021.

Evolution of the organic market: takeaways

- The decreased growth of 2022 of the organic market is to be put in perspective because:
  - Extraordinary growth during the Covid period because of external factors: 2020 cannot be taken as a reference year;
  - When looking at the long-term, the organic market is still growing.

➢ We see signs of recovery when comparing to the pre-Covid levels.

➢ Need for policy coherence!

Policy makers and the private sector need to support the organic market to encourage and foster that growth, e.g.:

- ➢ Fight greenwashing
- ➢ Adequate support through CAP & other policies

Don't panic the future is organic

IFOAM ORGANICS EUROPE

Support for markets & policy coherence

Organic producers are hit hard by the economic crisis and should be supported to limit the risk of deconversion. Discounters have grown their organic offer across Europe.

This growth could be leveraged further using nudging techniques to stimulate their customers to buy more organic products and create food environments favorable to sustainability.

Whether led by retailers, certifiers, Trade organisation or NGO's consumer-facing communication is key - impactful campaigns with clear messages for confused consumers showing how organic addresses the issues they care about - e.g. health/nutrition and climate.

Organic Market Review- Asia

Jennifer Chang (Executive Director)

IFOAM - Organics Asia & Asian Local Governments for Organic Agriculture

jchang@ifoamasia.org

Sources

- **World of Organic Agriculture 2024**
- **Contributions by IFOAM-Organics Asia Members**

  - China (Prof Qiao Yuhui, China Agricultural University)

  - India (Dr Thomas Jacob, Advisor, Peermade Development Society)

  - Japan (Dr Yoko Taniguchi, Setsunan University)

  - South Korea (Jennifer Chang, IFOAM-Organics Asia)
- **Other online sources**

- https://www.researchdive.com/press-release/organic-food-market.html

- www.researchandmarkets.com

- Times of India, 25 June 2023

- Mordor Intelligence

- https://www.asdreports.com/market-research-report-620374

- USDA Foreign Agricultural Service – GAIN Country Reports

- www.expertmarketresearch.com/reports/south-korea-organic-food-market

Status of the Organic Sector in Asia in 2022 (1)

- **Organic Land development**

- 160.5% growth in organic agricultural land in Asia for the past 10 years with more than 8.8 million hectares (constitutes 9% of the total global organic land)

- India is the second country in the world with the largest share of organic land of 4.73 million ha & China is the fourth country in the world with 2.90 million ha of organic land

- **Organic Producers**

- 303.5% growth in organic producers for the last ten years with **2'728’678 organic producers** in 2022 (constitutes 60.6% of organic producers in the world)

- India has the largest number of organic producers in the world with over 2,480,859 million producers

- Thailand is third in the world with 121,540 producers

Status of the Organic Sector in Asia in 2022 (2)

- **Global Organic Market**

 - China is the third largest market with 12.4 billion euros (9.2% of the global market of 135 billion euros)

- **Organic Trade from Asia**

- Exports to EU decreased by 9.1%

- Exports to the US decreased by 6.8%

- Between 2021/2022, imports of organic products into the EU and US decreased **the most from India** (-73´590 MT, -41.9 percent) due to the termination of organic recognition agreements

Recent Trends

- Growing consciousness of wellness especially urban consumers since the COVID-19 pandemic for healthier and organic food
- The growth of e-commerce and its convenience have given consumers more access to organic food options - more online platforms are featuring organic items
- Organic market is forecasted to expand in Southeast Asia especially in Vietnam and Indonesia due to the growing population and robust economic growth
- Increase in public procurement of organic food in schools and the military in East Asia countries especially South Korea, Taiwan and Japan has also maintained growth in the organic sector

\- (South Korea: 40% of organic food produced are procured for school lunches)

- The steady growth of PGS will lead to the expansion of the domestic market for organic food

Organic Market Growth

China
12.4 billion euros in 2022

India
1.188 billion euros in 2022

Japan
1.474 Billion euros in 2022

South Korea
1.6 billion euros in 2023

Middle East
1.23 billion euros in 2020


Thank You!

Global Organic Market Overview: Australia

The Australian Organic Sector

A snapshot

Domestic Insights: Resource Base

53,016,058 ha

Total area of production[b]

3,035

Certified organic businesses in Australia[c]

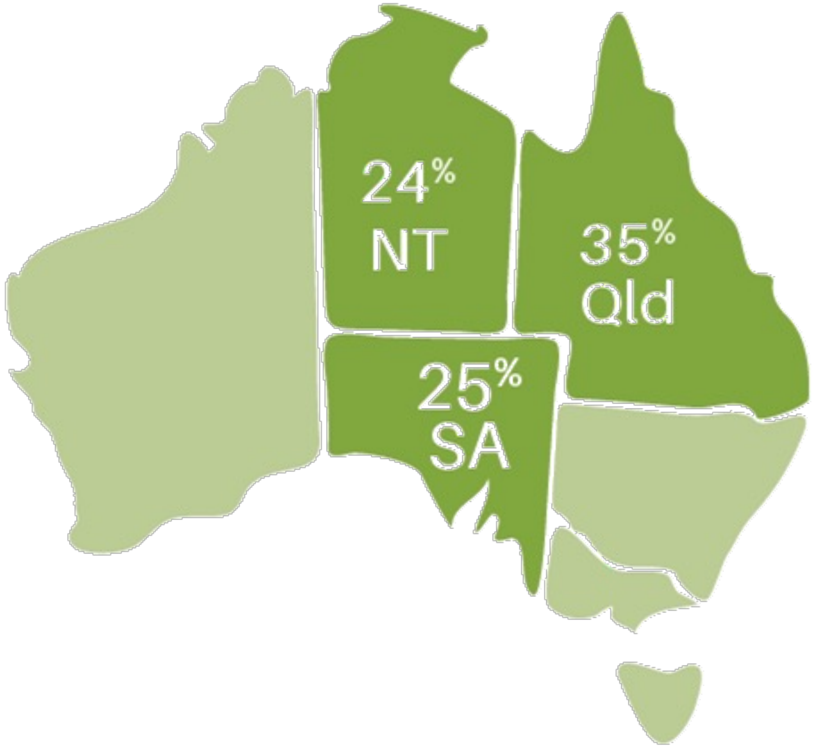
95%

are fully certified organic[b]

5%

are in conversion[b]

Top 3 states in area of organic production[b]



Domestic Economic Insights

$2.1B*

Domestic organic sales

57/43

Raw vs processed products

55%

Domestic market*

45%

Export market*

Domestic Economic Insights

$851.5m

total value-added for the organic industry

0.04%

Direct value added by the organic industry to Australia's GDP

$2.631B

total flow on contribution for the organic industry

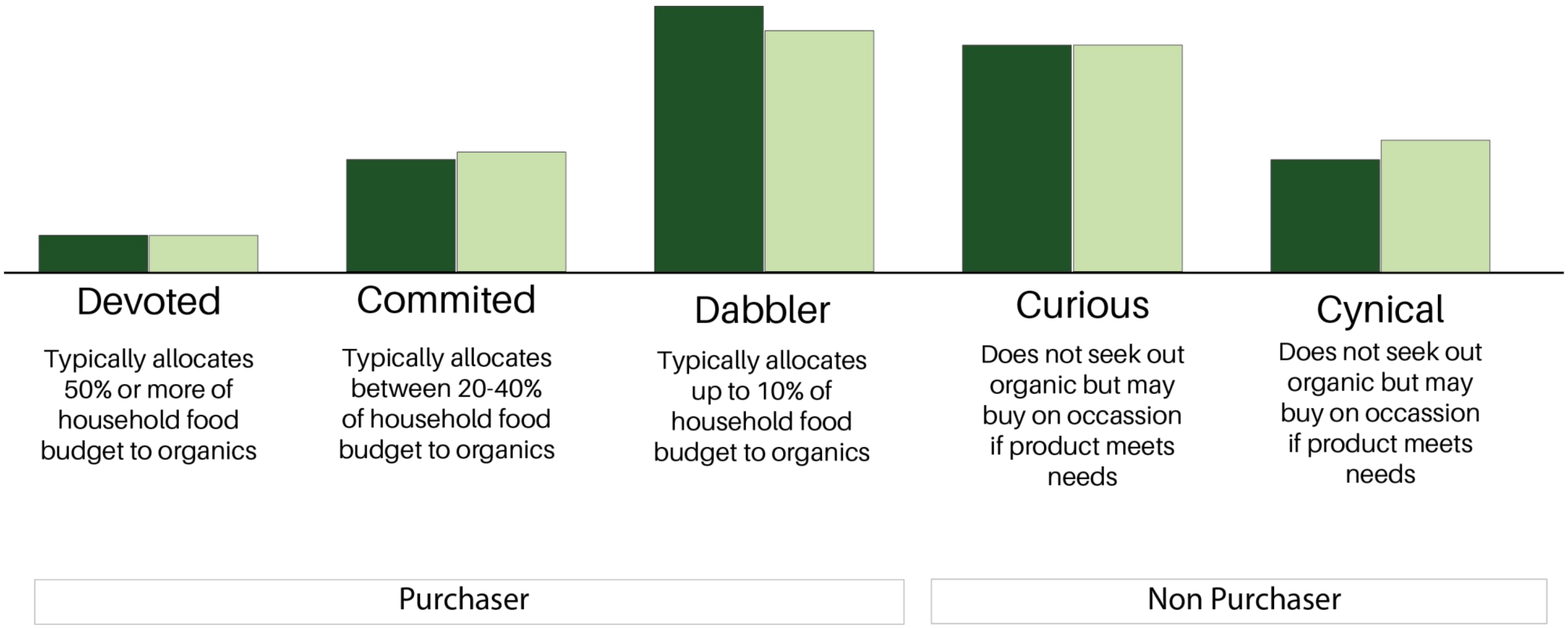
12,434

FTEs employed by the organic marketing in Australia

Consumer Insights

Understanding consumer behavior

Consumer Insights



Consumer Insights

Shoppers that are most likely to purchase organic products:

- have household incomes above $40,000
- are aged 18-39 years old (Generation Z and Y)
- are studying or have already received a university degree
- Have at least one child under 16 years living at home

- 77% of organic shoppers are aware of certification marks (up from 59% in 2019)
- 84% trust certification marks
- 75% of organic shoppers are 'regular' users of pack and/or shelf information when purchasing
- 58% of organics shoppers check for 'certification logo on the label

Consumer Insights

35%

of shoppers who bought organic products increased their household budget spent on organic from 2021 to 2022

53%

bought more fruit and vegetables

36%

bought more eggs and dairy

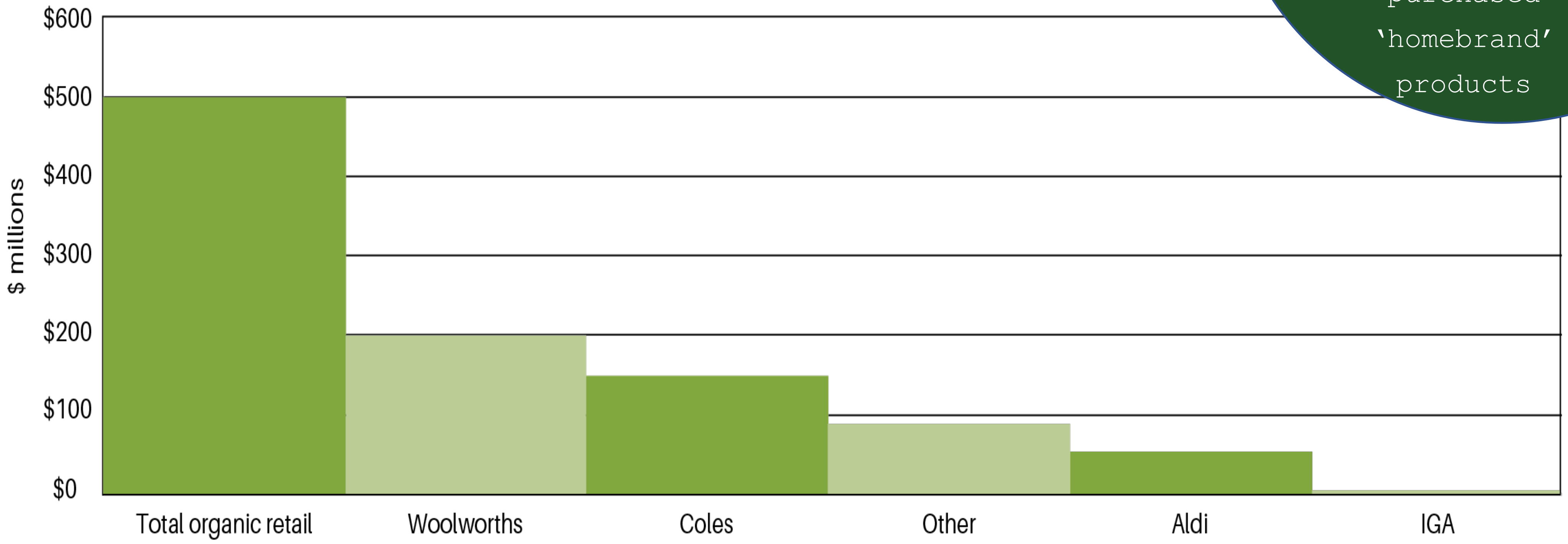
33%

bought more meat

Organic Retail

93%

of Australian consumers who purchased organic products in the last year purchased 'homebrand' products



Organic Retail

Increasing trend in organic shoppers purchasing at all stores and outlets (recovered from COVID-19 pandemic dip)

Retailers with the highest purchase participation rates amongst organic shoppers include **supermarkets (98%), fruit and vegetable shops (76%),** and **markets (76%)**

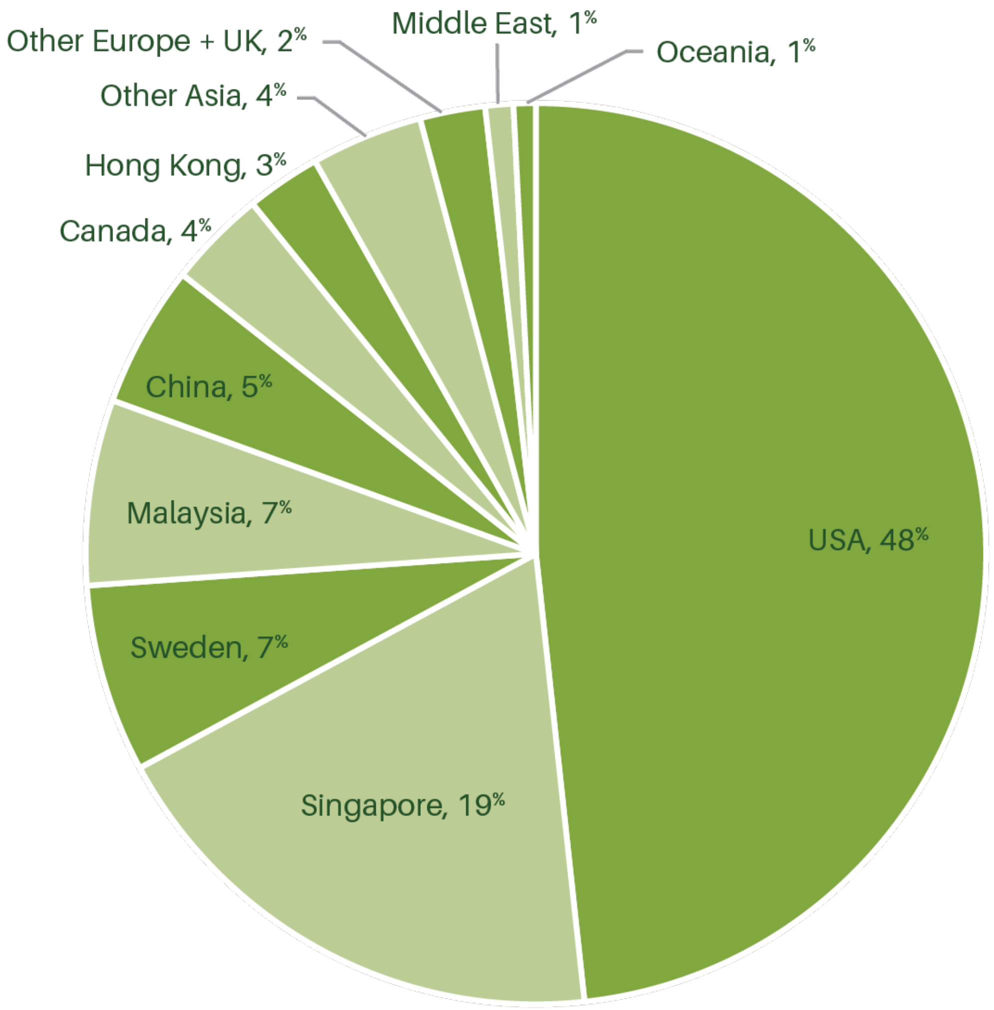
35% increase in purchase intensity amongst organic purchasing households

75% of shoppers buy 'home brand' due to perceived price/value, and **50%** buy 'home brand' due to perceived quality

State of play

An assessment of the Australian organic market in 2022

International Insights - Export Growth



Raw product

8,041 t

total export volume of raw products[b]

Singapore, USA, Malaysia

top export destinations[b]

Processed product

12,394 t

total export volume of processed products[b]

USA, China, Sweden

top export destinations[b]

Industry State of Play

STRENGTHS

Strong recovery from COVID-19

Domestic demand and trust increasing

Certified farmland increasing

WEAKNESSES

Lack of national standard and regulatory framework

Barriers to export are high

Supply chain disruption

OPPORTUNITIES

Capitalise on consumer culture changes

Leverage the ‘organic brand’

Value add raw products

THREATS

Increasing cost of wages and inputs

Tighter houshold budgets

Future trade barriers

Australian Organic Limited, 18 Eton Street, Nundah Qld 4012

contact@austorganic.com | 07 3350 5716 | austorganic.com

February 2024

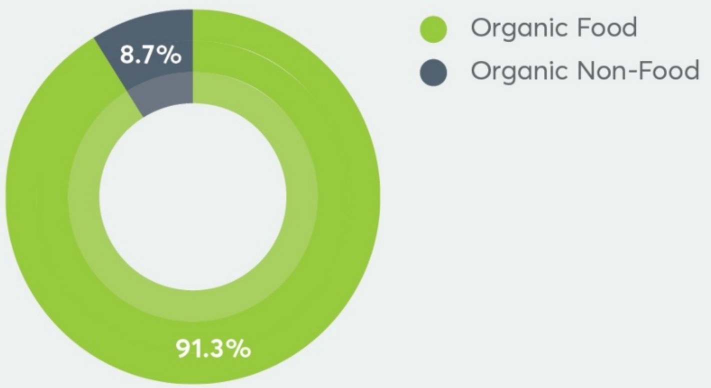
US Organic Market

Presented by

Tom Chapman
Co-CEO

SINCE 1985
Organic trade association

Total U.S. Organic Sales in 2022



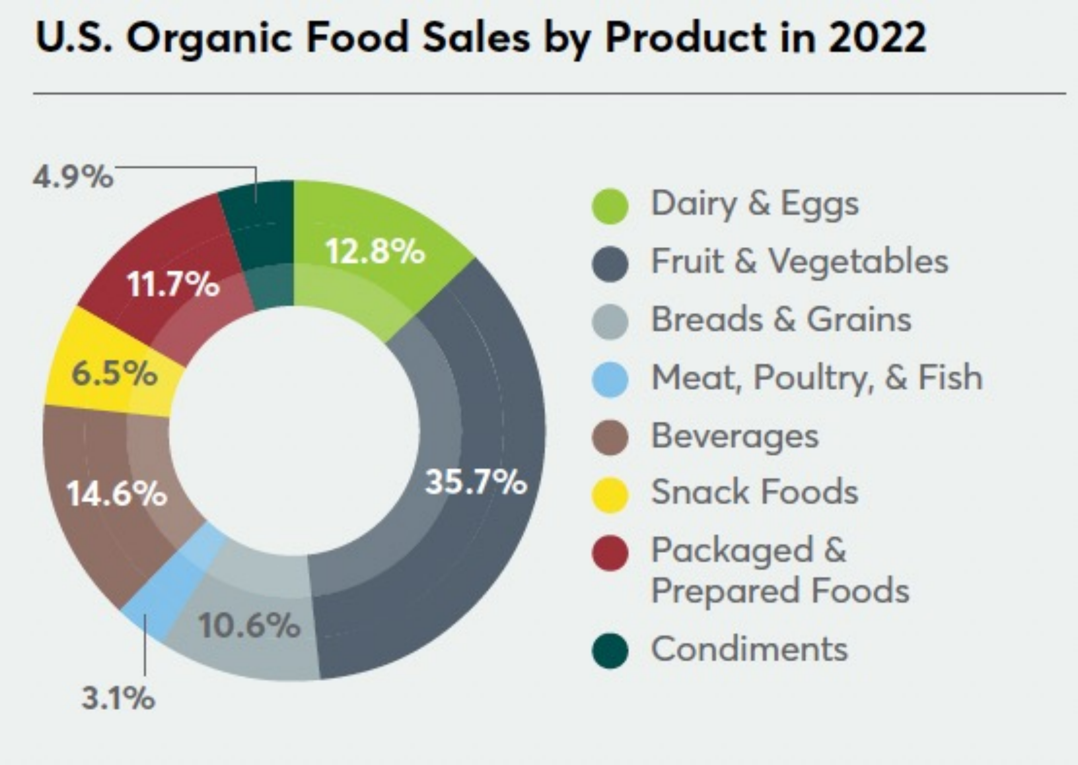
CATEGORY	2022 SALES	2022 GROWTH
Organic Food	61,670	4.3%
Organic Non-Food	5,906	1.6%
Total Organic	**67,576**	**4.0%**

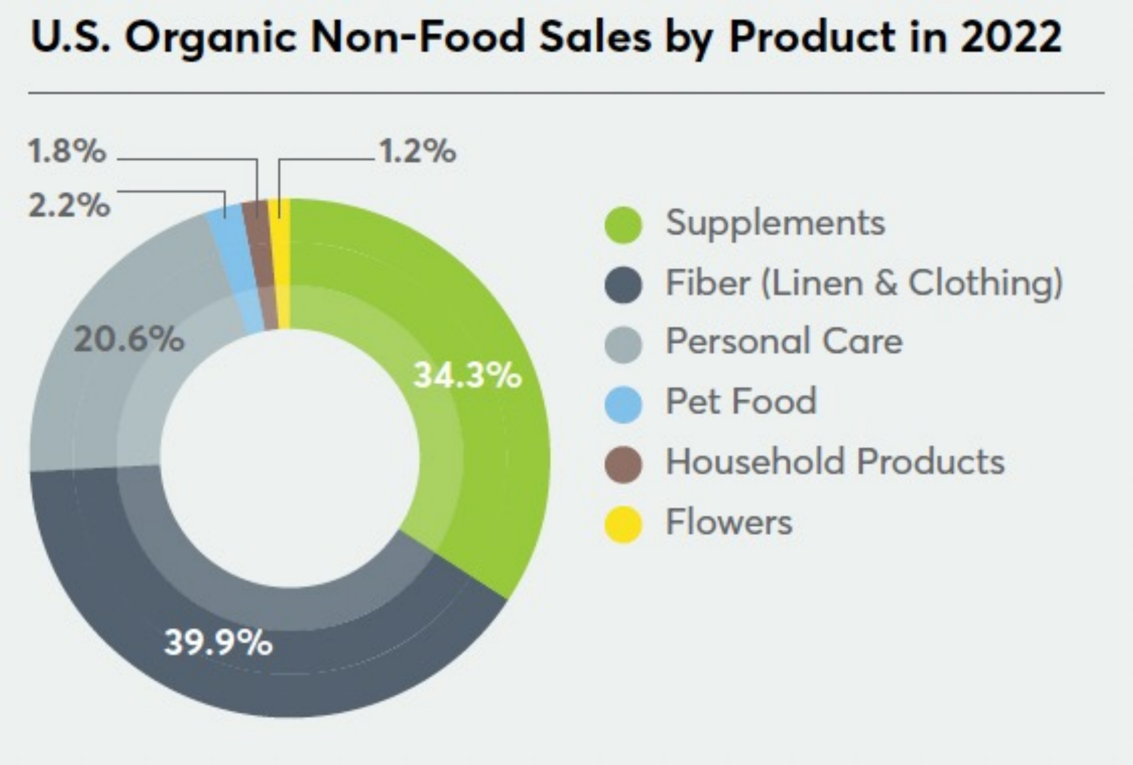
Source: Organic Trade Association's 2023 Organic Industry Survey conducted 1/13/2023–4/1/2023 ($mil., consumer sales).

FOOD comprises more than **90%** of organic sales

ORGANIC NON-FOOD products are a nearly **6 billion** marketplace

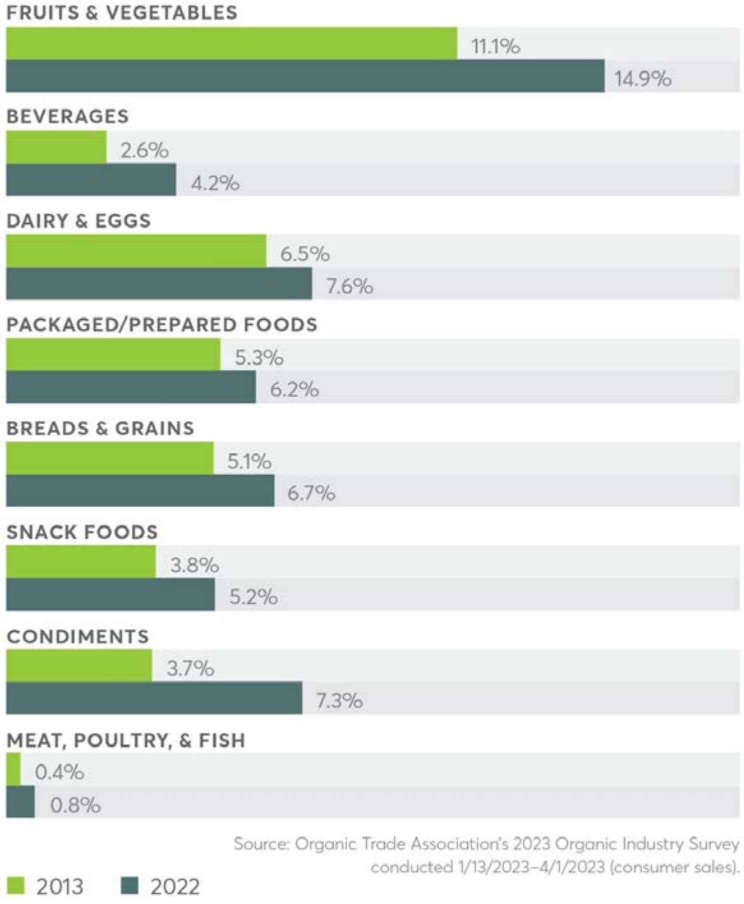
U.S. ORGANIC SALES BY PRODUCT, FOOD & NON-FOOD





ORGANIC PENETRATION IN U.S. FOOD MARKET

U.S. Organic Food Penetration of Total Food Market by Category, 2013 vs. 2022



U.S. Organic Food vs. Total Food Sales, Growth and Penetration, 2013–2022

CATEGORY	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Organic Food	31,840	35,768	39,893	43,606	46,430	49,174	51,567	58,092	59,149	61,670
Growth (%)	12.6%	12.3%	11.5%	9.3%	6.5%	5.9%	4.9%	12.7%	1.8%	4.3%
Total Food	715,746	740,936	760,191	765,064	773,985	791,715	810,388	911,765	935,565	1,025,462
Growth (%)	2.7%	3.5%	2.6%	0.6%	1.2%	2.3%	2.4%	12.5%	2.6%	9.6%
Organic (as % Total)	**4.4%**	**4.8%**	**5.2%**	**5.7%**	**6.0%**	**6.2%**	**6.4%**	**6.4%**	**6.3%**	**6.0%**

Source: Organic Trade Association's 2023 Organic Industry Survey conducted 1/13/2023–4/1/2023 ($mil., consumer sales).

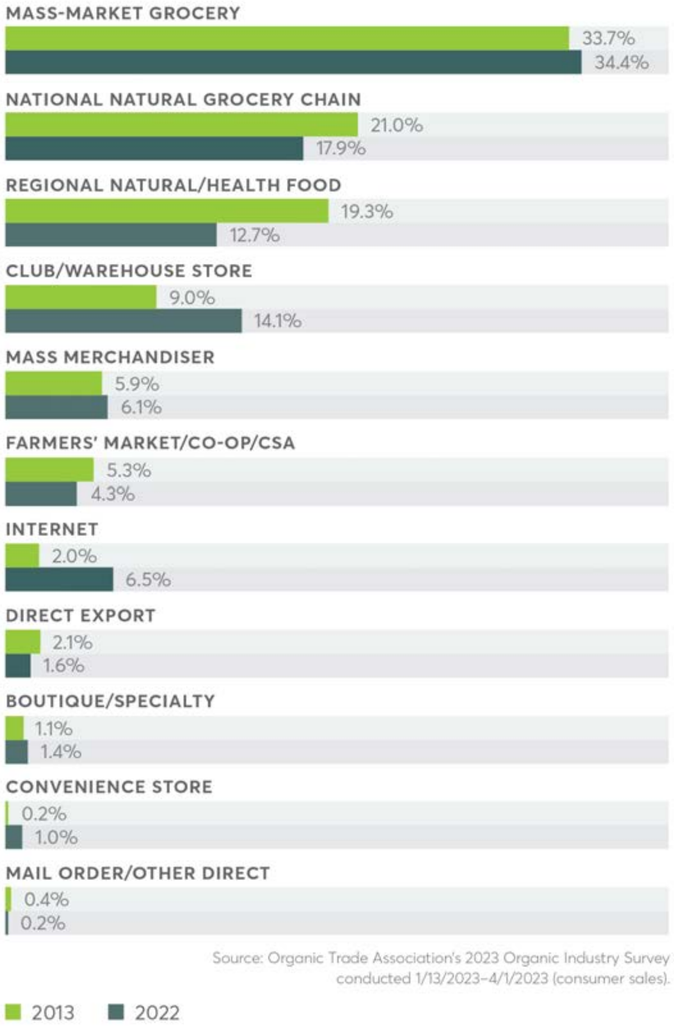
U.S. FOOD SALES BY PURCHASING CHANNEL

U.S. Organic Food Sales by Channel in 2022

CHANNEL	2022
Mass-market Grocery	34.4%
National Natural Grocery Chain	17.9%
Club/Warehouse Store	14.1%
Regional Natural/Health Food	12.7%
Internet	6.5%
Mass Merchandiser	6.1%
Farmers' Market/Co-op/CSA	4.3%
Direct Export	1.6%
Boutique/Specialty	1.4%
Convenience Store	1.0%
Mail Order/Other Direct	0.2%
Total Organic Food	**100.0%**

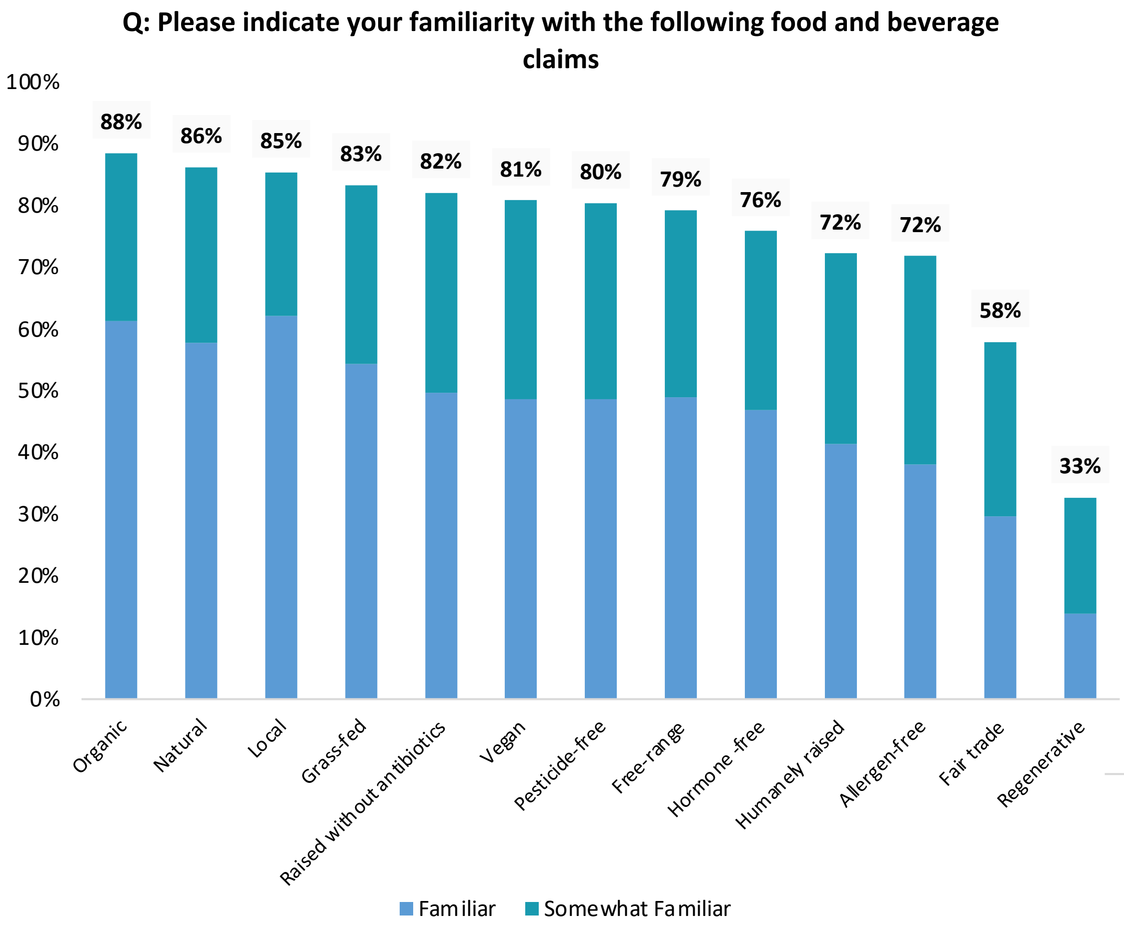
Source: Organic Trade Association's 2023 Organic Industry Survey conducted 1/13/2023–4/1/2023 (consumer sales).

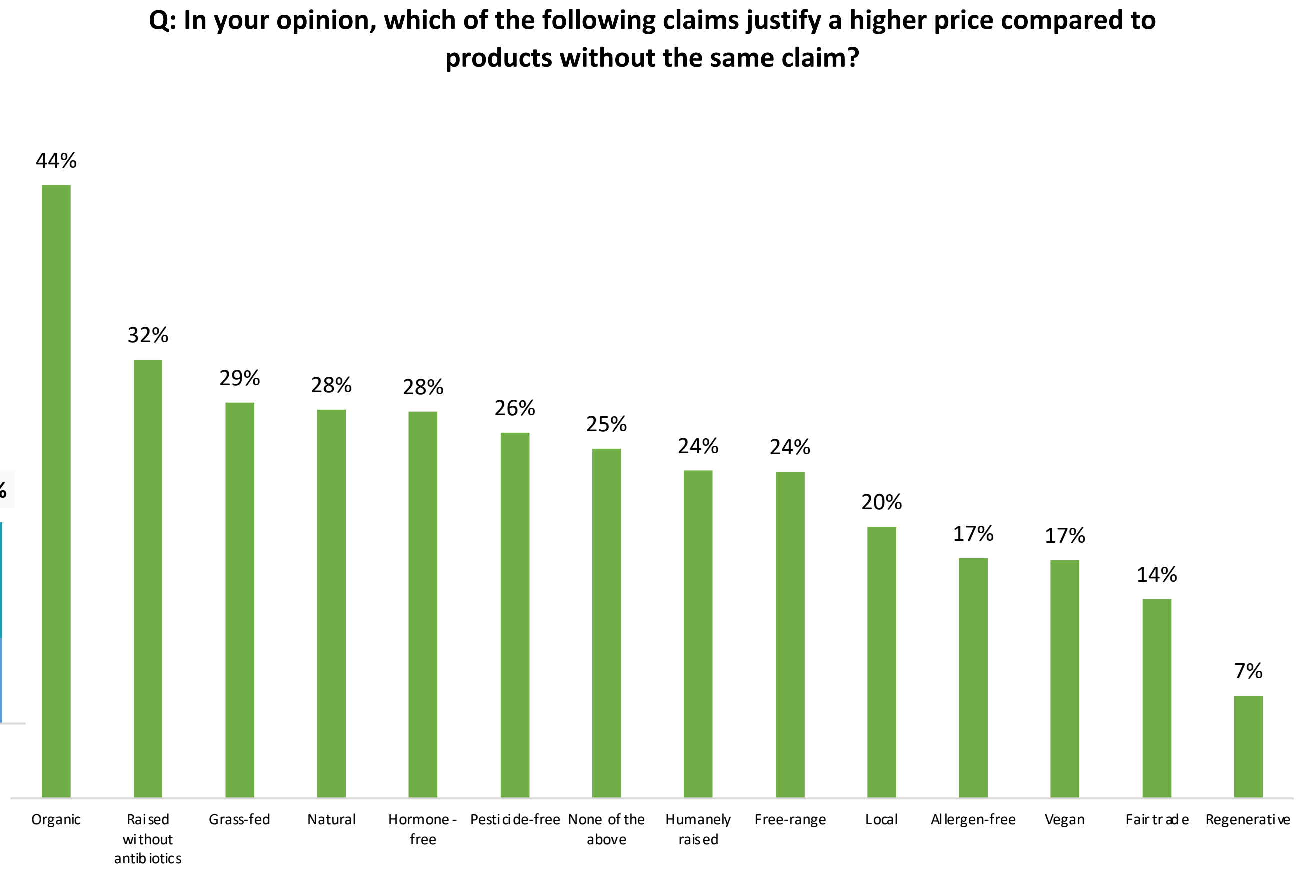
U.S. Organic Food Percent of Market by Channel, 2013 vs. 2022



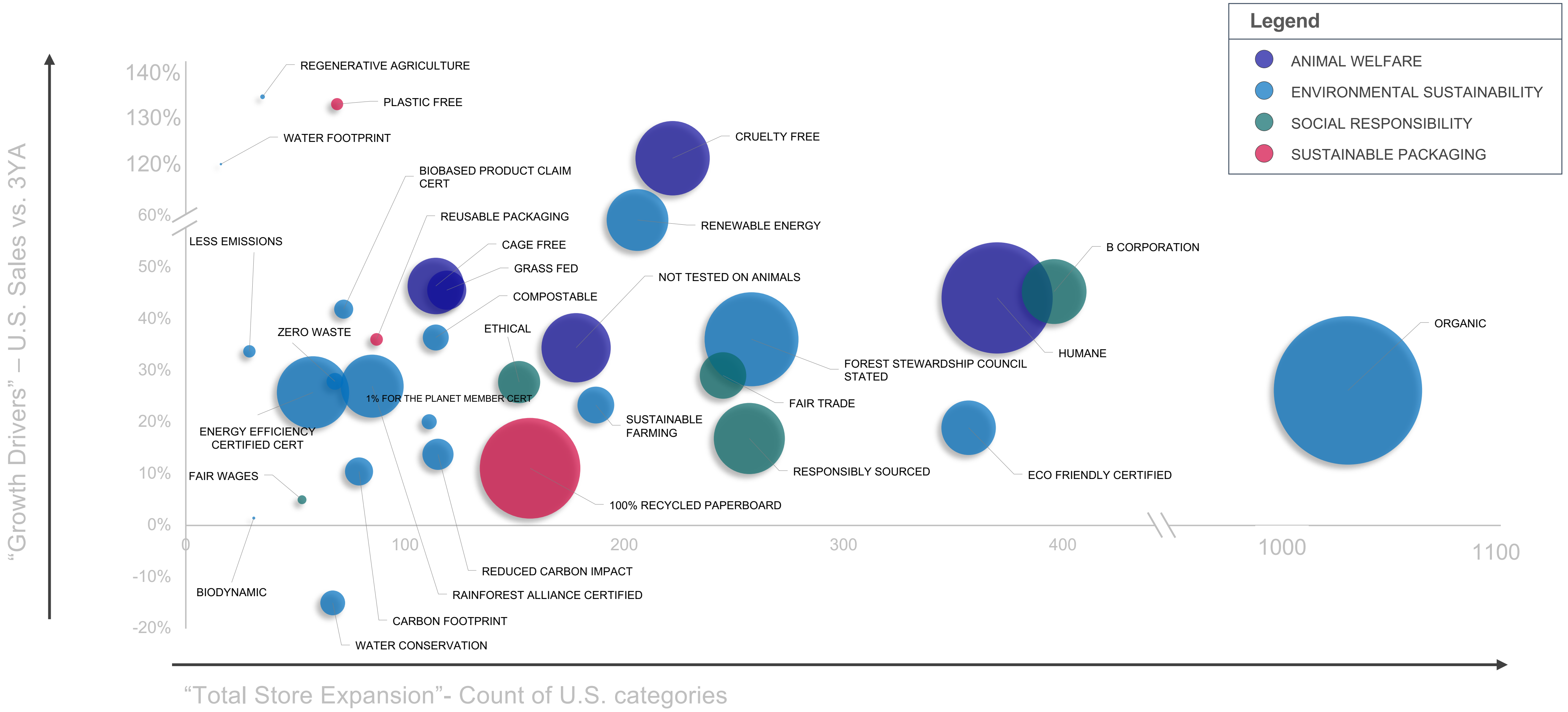
Source: Organic Trade Association's 2023 Organic Industry Survey conducted 1/13/2023–4/1/2023 (consumer sales).

US consumers reported most familiarity with “Organic” and “natural” claims while “regenerative” and “fair trade” are the least understood. “Organic” justifies a higher price for 44% of US consumers, higher than any other claim.





Organic most penetrated ESG claim across the store



Bubble size denotes total sales in L52 week All attributes represent claims STATED on package unless indicated by an * symbol
Source: NielsenIQ Retail Measurement Services, NielsenIQ Product Insight, powered by Label Insight, Total Store; Total US xAOC; 52 weeks W/E 11/05/22 vs 3YA

THANK YOU

Tom Chapman

Co-CEO

Phone: 202.735.1232
Email: tchapman@ota.com

Canada Organic by the Numbers

Tia Loftsgard, Executive Director
Biofach 2024

Canada Organic trade association

Canada Organic Trade Association

Strategic Areas of Focus:

- Market Access & Development
- Industry Intelligence
- Public Advocacy
- Regulatory Affairs

Canadian Organic Market

5th Largest Consumer Market

9th largest per capita spend globally

CONSUMER PREFERENCES

Over half

55%

seek organically produced food when shopping or dining out

CONSUMERS

ON AVERAGE, CANADIANS SPEND

$184

WEEKLY ON ORGANIC GROCERY

23%

OF CANADIANS ARE BUYING MORE ORGANIC THAN A YEAR AGO

54%

OF CANADIANS SAY THEY TRUST CANADA ORGANIC CERTIFIED

Three in five

60%

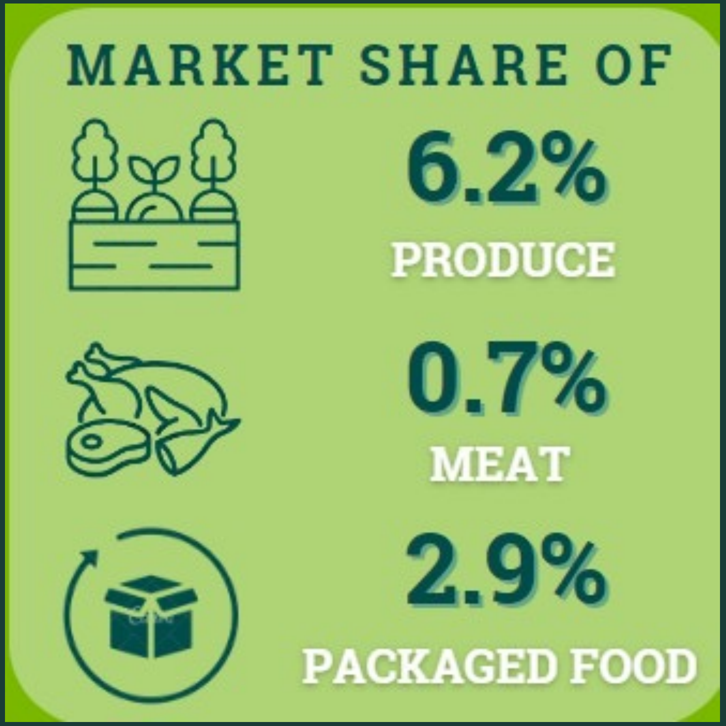
are willing to pay more for products that are organically sourced

Canadian Organic Market

$10.26 Billion Sales*

	2020	2021	2022
Annual Sales	$8.13 Billion	$9.35 Billion	$10.26 Billion
Growth Rate	27%	15%	9%

*Food and Beverages is 77% of the total valued at $7.94 Billion



3.3% TOTAL MARKET SHARE

Organic Trade: Exports

TRADE

Canada is a global leader of organic:

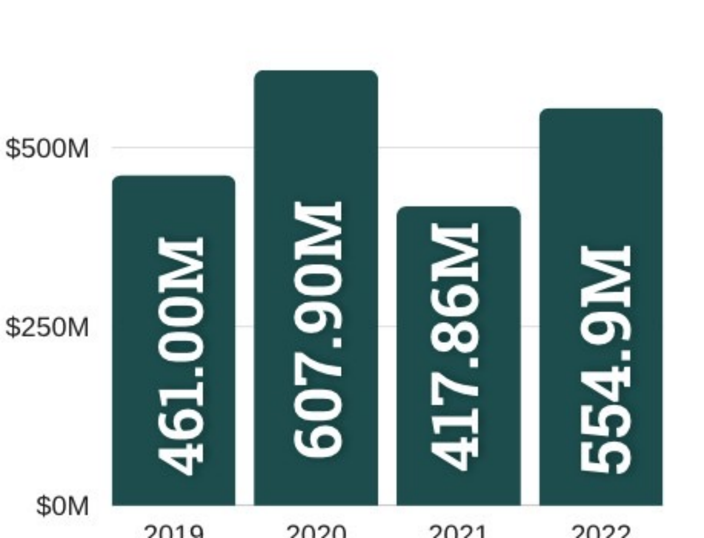
Canada exports over 180,000 MT annually

4th largest producer of pulses

6th largest producer of cereals

9th largest producer of oilseeds

producing 99% of the world's organic cranberries

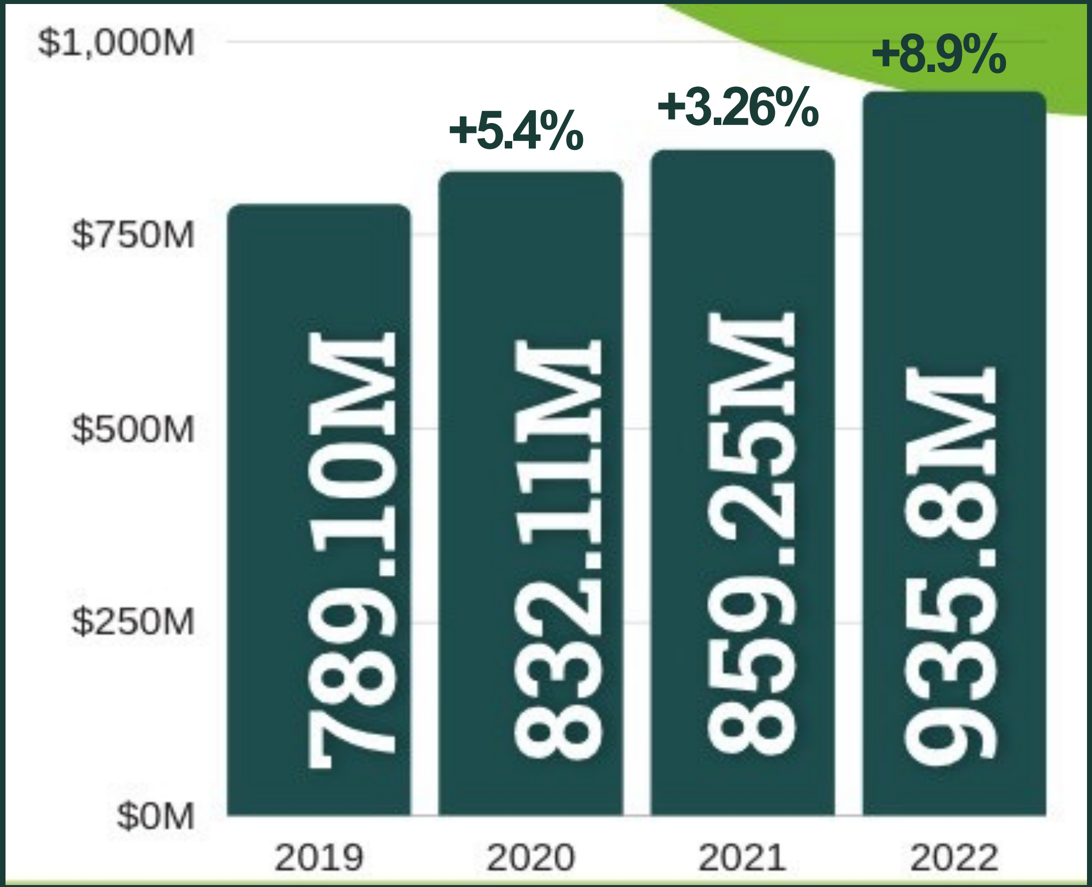


$554.9M

EXPORTS

33% growth rate in 2022 over 2021

Organic Trade: Imports



20th largest importer globally

$935.8M

IMPORTS

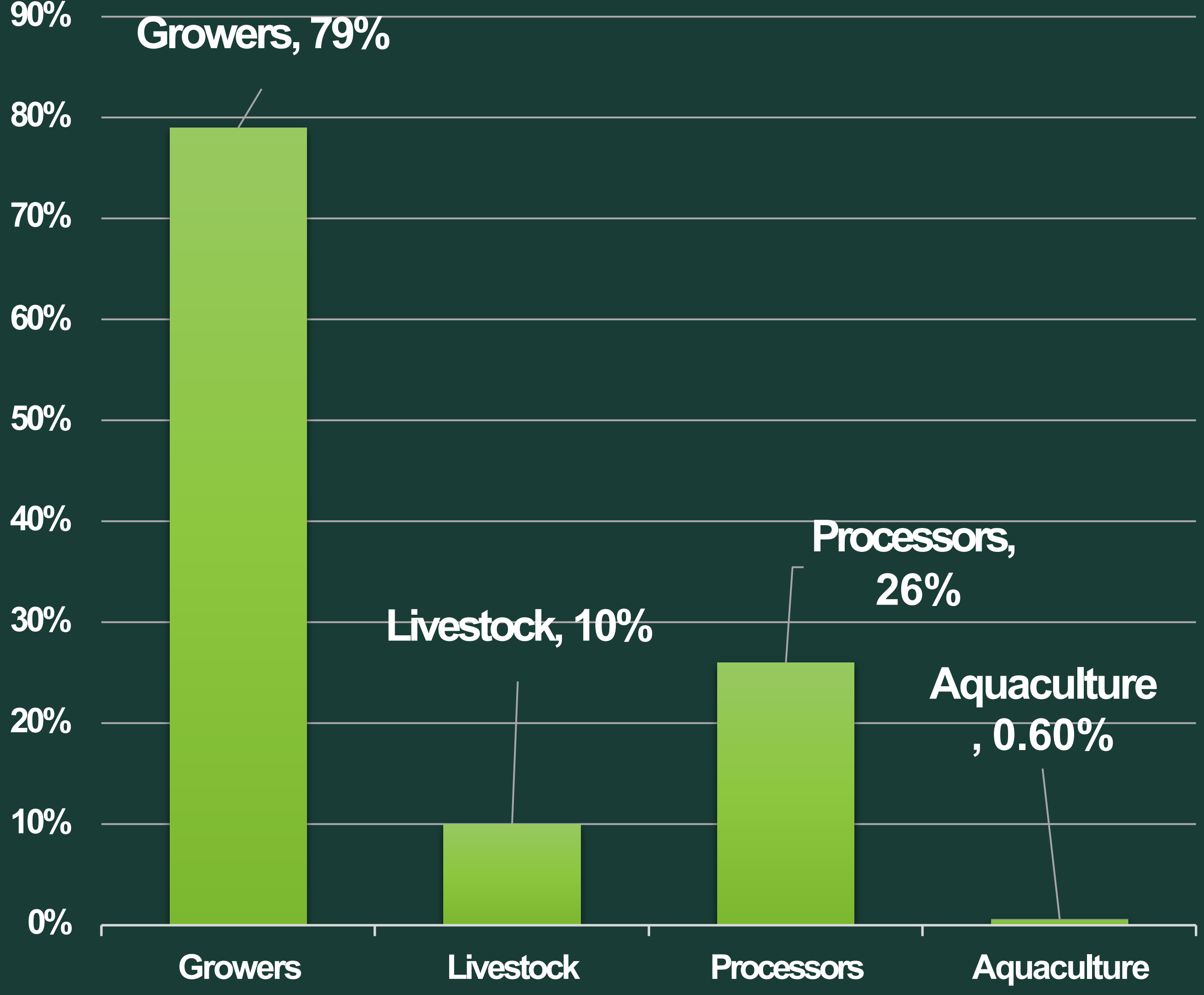
9% growth rate in 2022 over 2021

Organic Operators

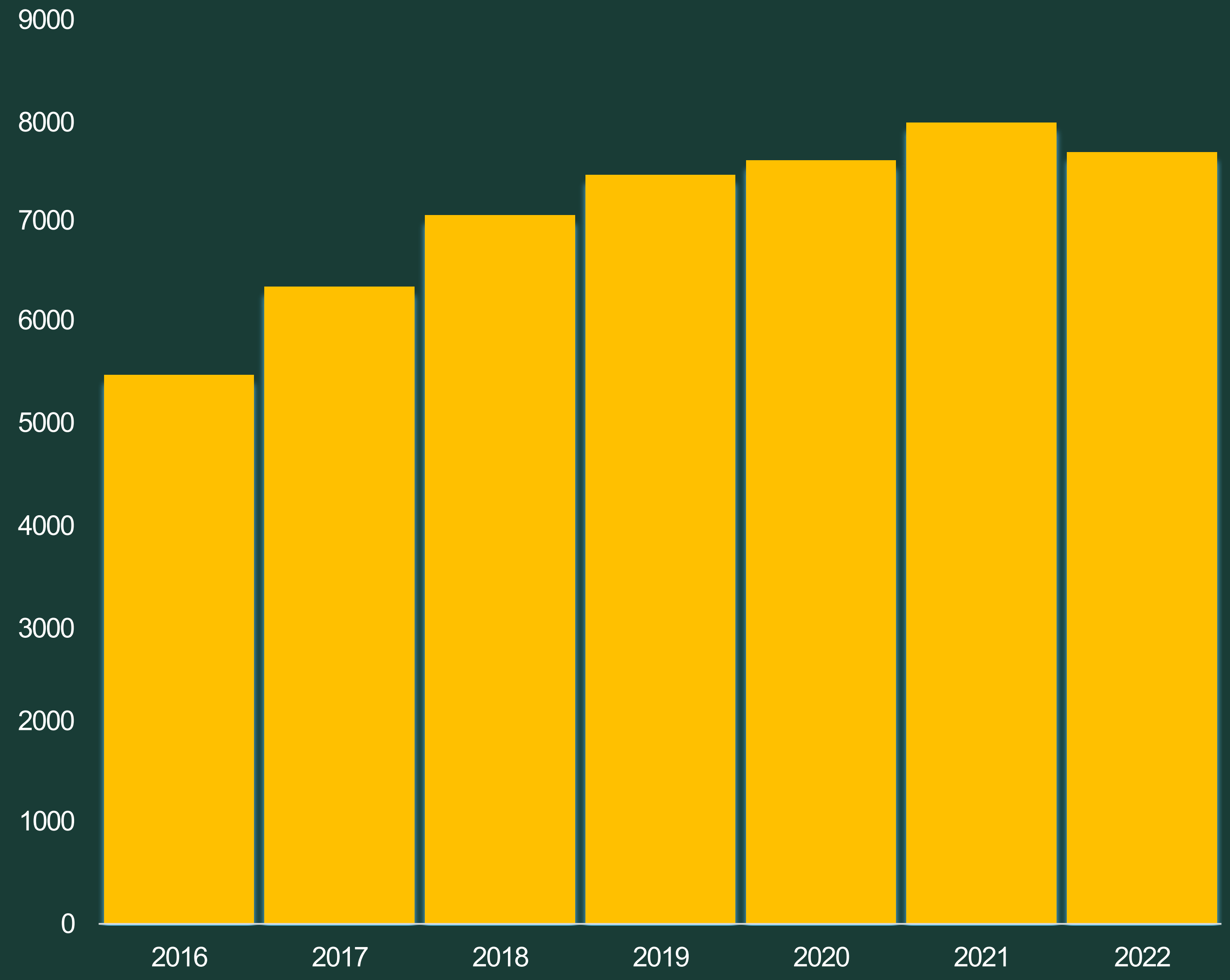
7702 operators in 2022

OPERATORS BREAKDOWN:

2022 data



Total Organic Operators



40% growth rate since 2016

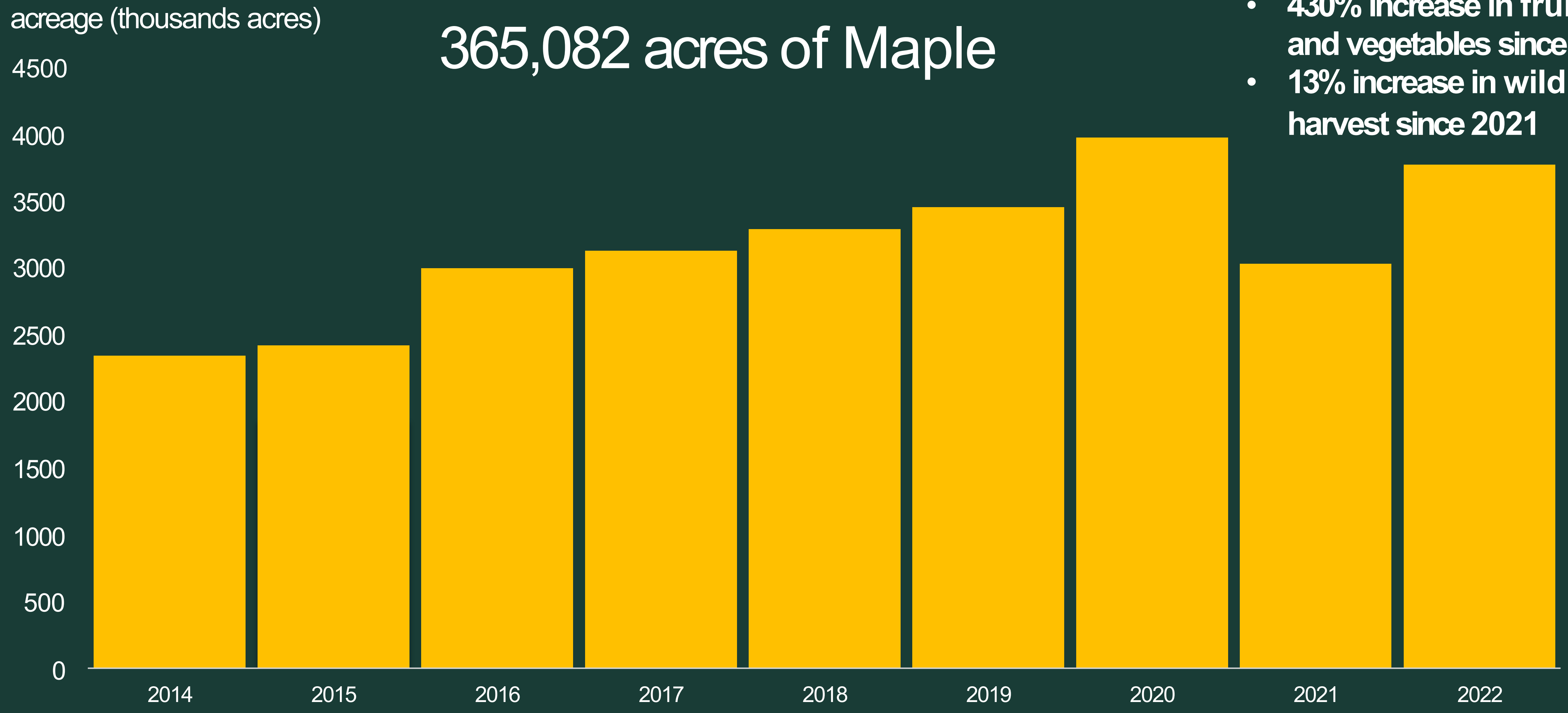
3.7% decrease since 2021 representing 296 operators

Total Organic Acreage

708,020
New Acres in 2022

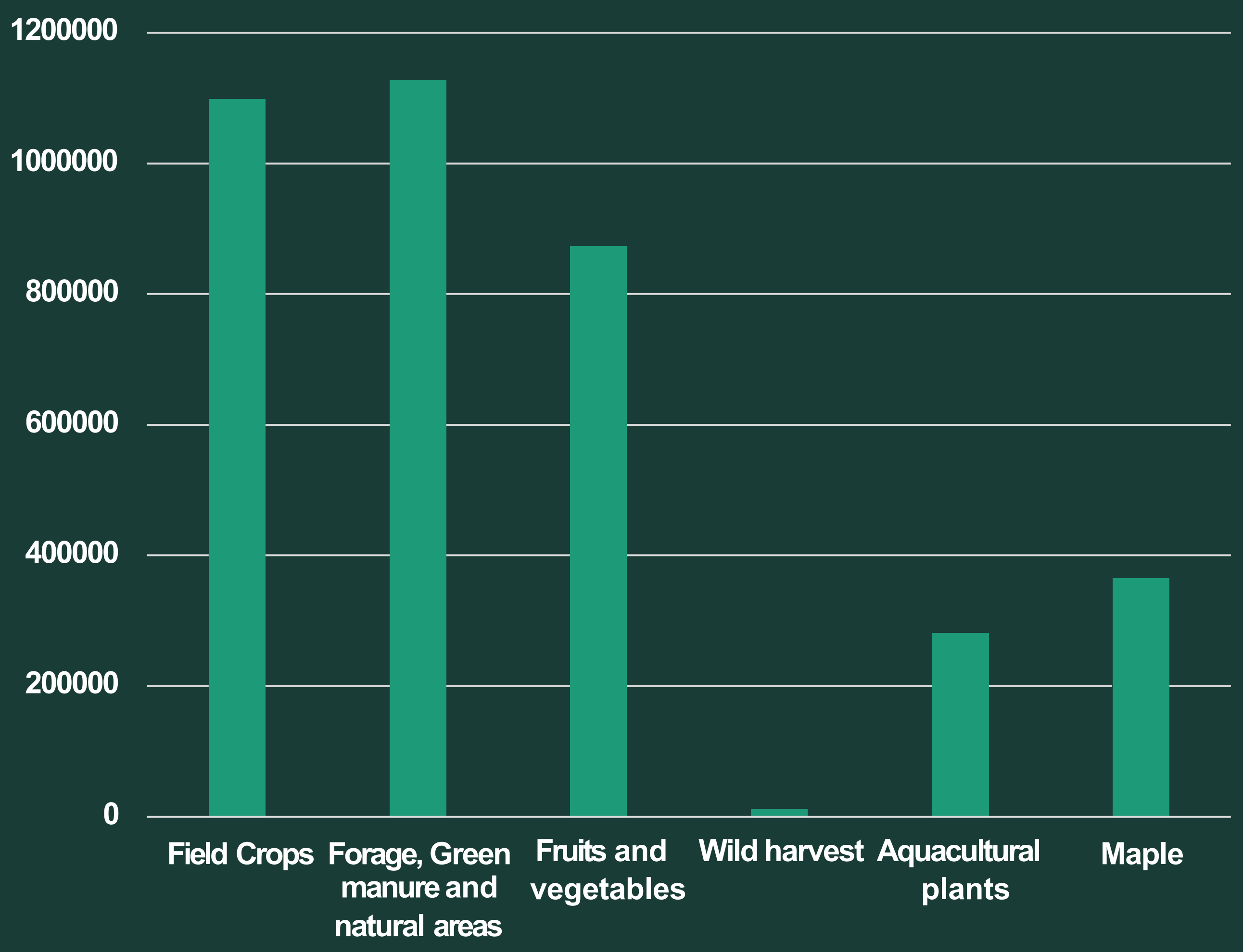
3.8 Million acres in 2022
365,082 acres of Maple

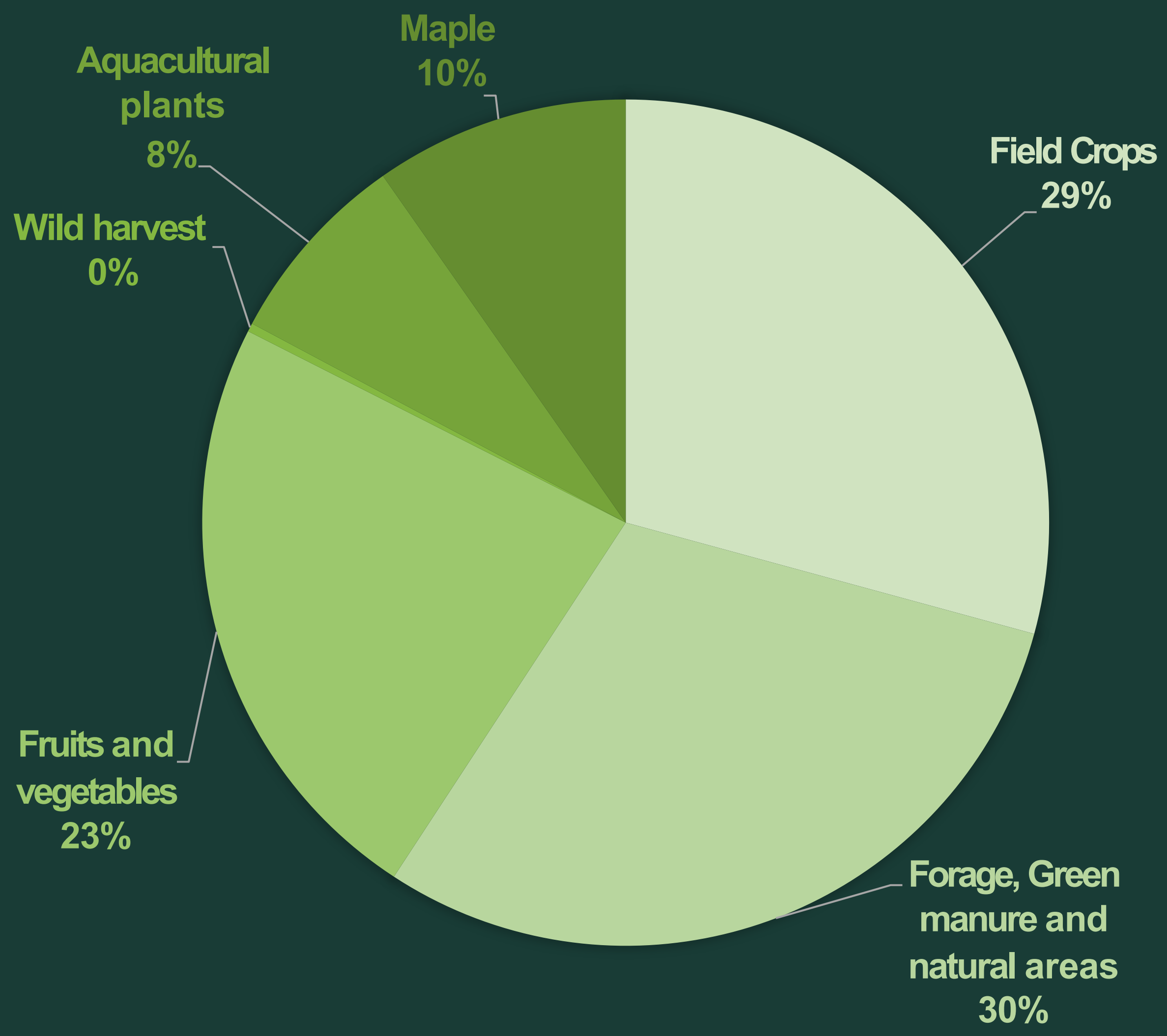
- **430% increase in fruits and vegetables since 2021**
- **13% increase in wild harvest since 2021**



Organic Acreage Breakdown

2022





Quick Facts Available

canada-organic.ca

The Organic Market in Latin America

The resilience of the organic sector

Julia Lernoud
Vice president
IFOAM – Organics International

Latin America and Caribbean – Snapshot 2022

- Over **270’000 organic producers**, nearly 10´000 organic producers less than in 2021, taking it back to the estimation of 2020
- Nearly over **9.5 million hectares** were reported in 2022 (10% of global organic land but only 1.3% of the agricultural land in the region). In 2022, the agricultural land has increased by nearly 53´000 ha
- **Argentina** (4.1 million hectares) and **Uruguay** (2.7 million hectares) - **Mainly grassland**

  → However, **temperate fruits** represent a big share of the organic exports of these countries
- Uruguay had the highest **organic share 19.6%**
- Bananas, sugar and coffee are most exported organic products
- **Nineteen countries** in the region have **legislation on organic agriculture**, and two countries are drafting such legislation.

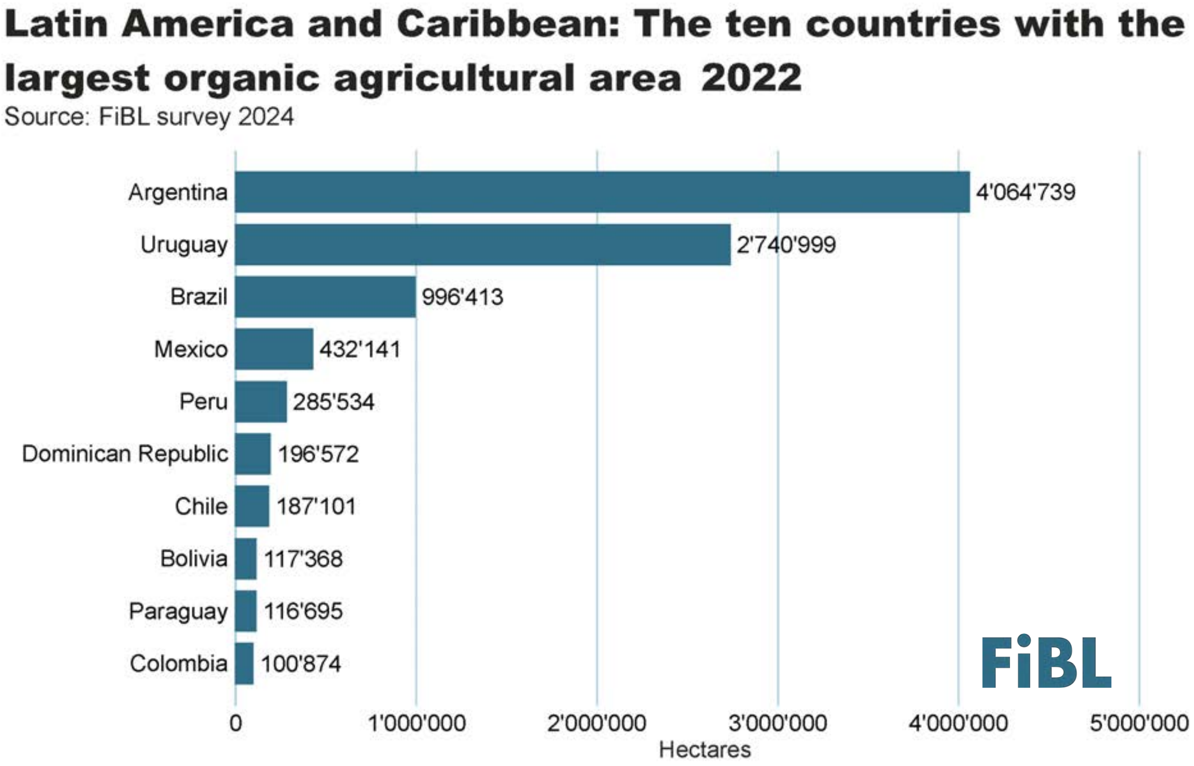
Source: FiBL survey 2024

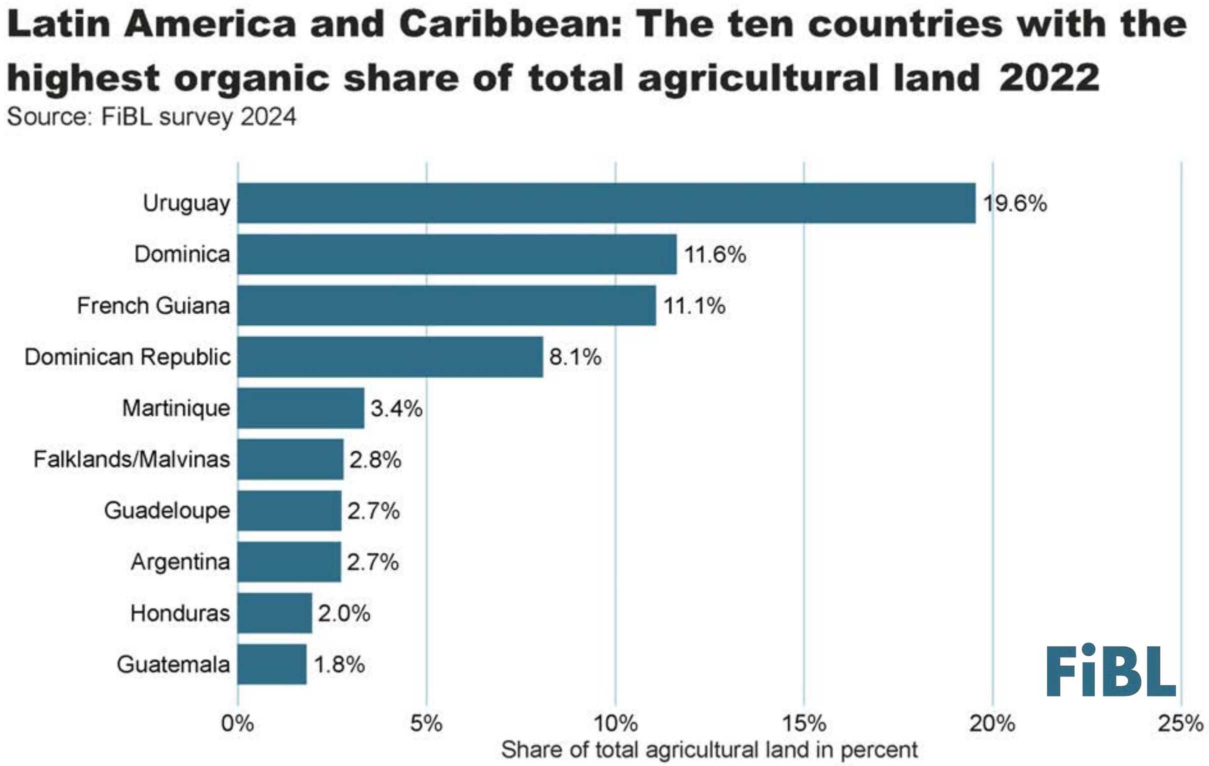
There is still a **lot of growth potential** in the region as organic takes only 1.3% of the agricultural land

Industrial agriculture has a big lobby power in Latin America, specially now with the new governments

IFOAM ORGANICS INTERNATIONAL

Peru continues to have the largest number of organic producers in Latin America and is placed **6th worldwide**!





Source: FiBL survey 2024

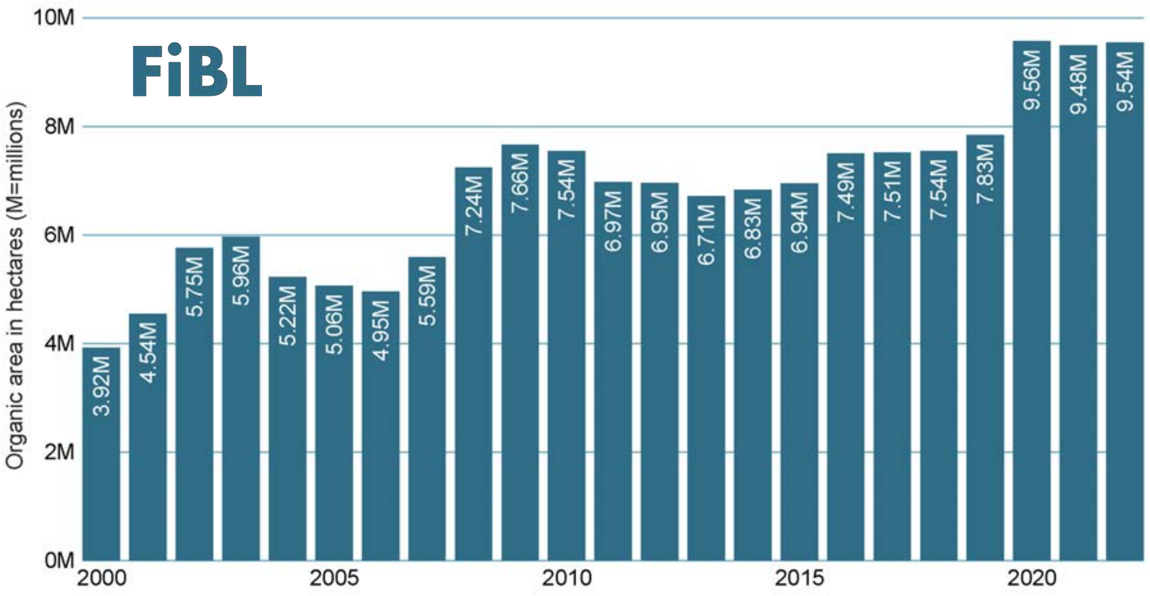
The **organic area growth** has been quite stable over the year – some ups and downs mainly due to Argentina's grassland

In 2022, **Mexico** (+ 81.5%) and the **Dominican Republic** (+ 67.5%) showed a significant growth

Source: FiBL survey 2024

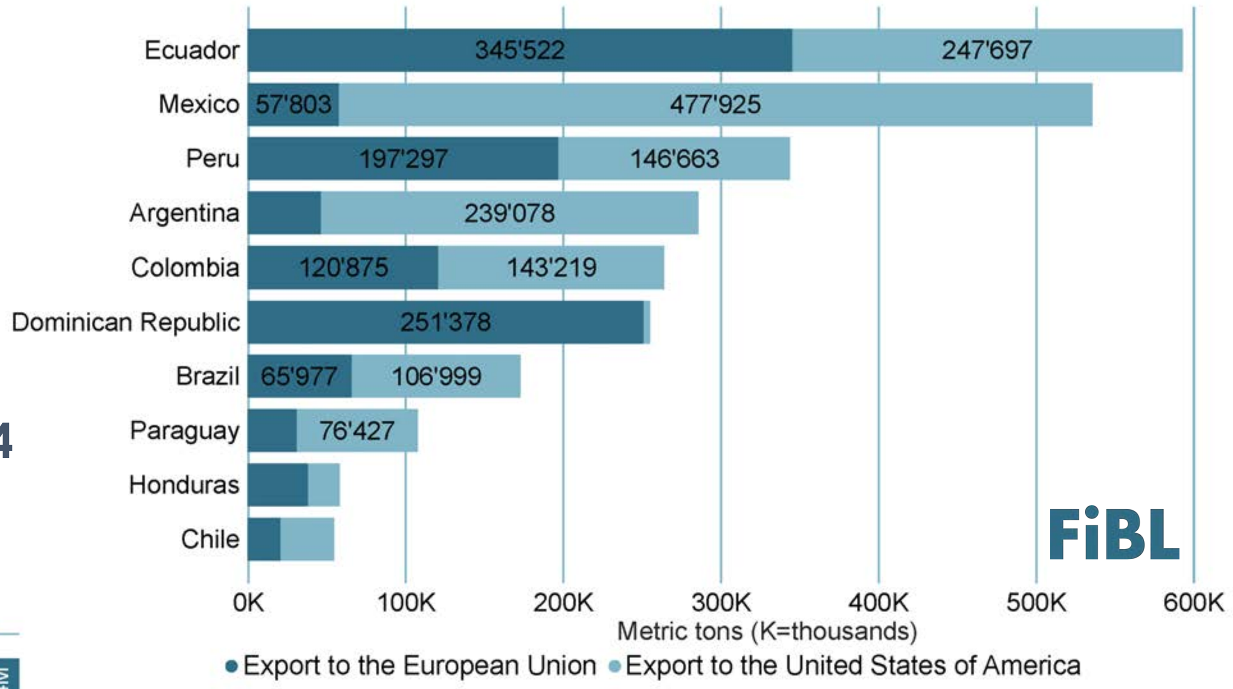
Latin America and Caribbean: Development of organic agricultural land 2000 - 2022

Source: FiBL-IFOAM-SOEL surveys 2001-2024



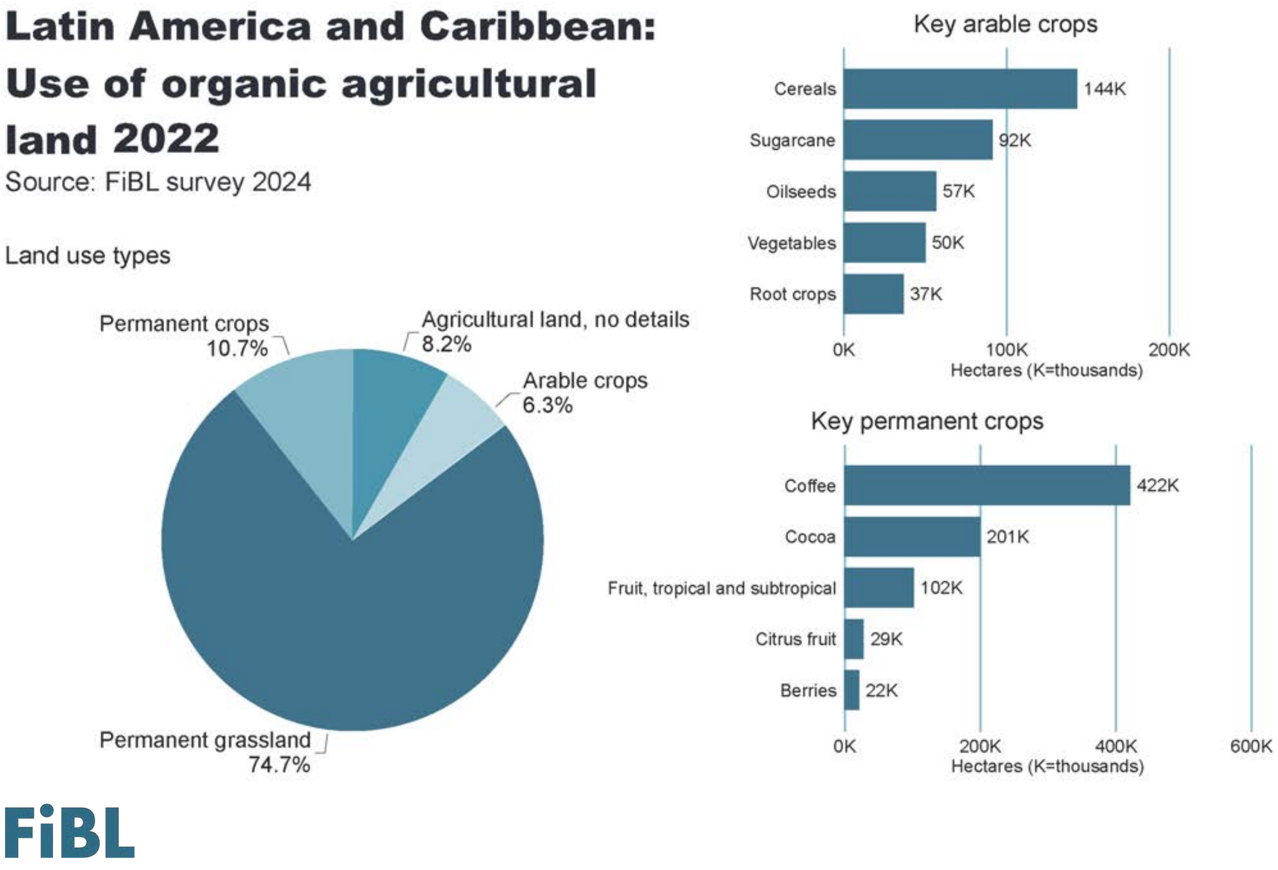
Latin America: Key EU and US export countries in 2022

Source: Traces/European Commission 2023, GATS/USDA 2023

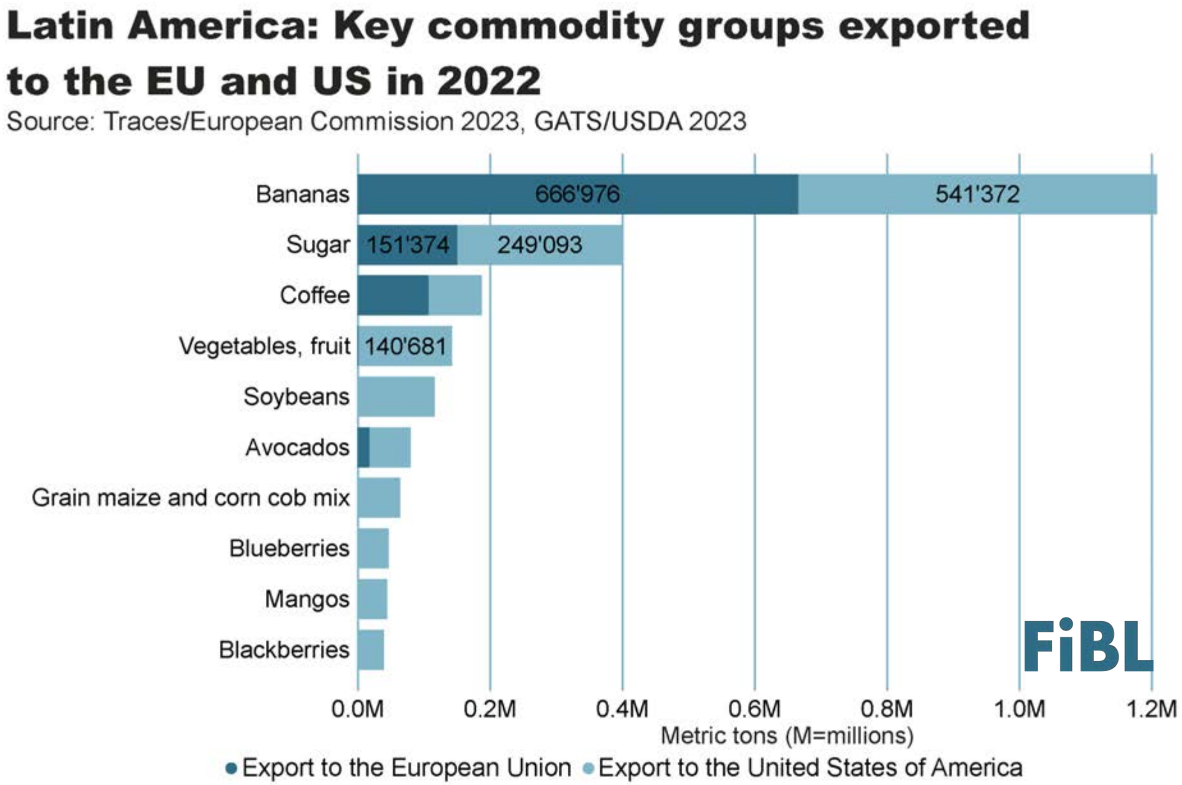


Some countries are **big players** in the global organic trade. **Ecuador was the largest exported** to EU and US, **Mexico** and **Peru** are also important players

According to the available data, LA exports almost equally to USA and Europe; however, the exports to Europe have slightly dropped



Peru, the Dominican Republic and Mexico are the largest producers of **coffee, cocoa and tropical fruits** in Latin America, and are among the largest in the world



Coffee as well as cocoa and tropical fruits are stil the main crop group - Most of it is for export

However, **the regional demand for these crops is increasing**

Source: FiBL survey 2024

A growing market with many opportunities!

IFOAM ORGANICS INTERNATIONAL

- **Growing domestic organic market**
  → **Brazil** has the largest domestic market for organic products in Latin America
  → Missing data – no collection systems
  → Bigger **diversity of products** – including products from other countries in the region

- **Looking for partners in the region**
  → Different negotiations and with the support from CIAO

- **Organic recognitions**
  → For the last years **Argentina** has celebrate the **Organic Day** and award the best organic initiatives in the country. Each year more initiatives are joining and sharing their experiences.

- **Political and social instability** in the region
  → all stakeholders need our **support the situation is not easy, specially for small farmers and small entrepreneurs!**

BIO MARKET EL SÚPER ORGÁNICO

ORGÁNICA PERÚ MARKET

FRESCO Mercado Saludable

Punto Orgánico

TODO ORGANICO DEL HUERTO A TU MESA - NATURAL Y FRESCO

The BIO & Natural TiendaOrgánica&Restaurant Way

Biovision Africa Trust

eoa ECOLOGICAL ORGANIC AGRICULTURE

Growing Sustainably

Global Organic Market Overview: Africa Perspective

BIOFACH Congress: Global Market Overview Session

14 February 2023, 13:30 - 15:00

David Amudavi (PhD)
Executive Director
Biovision Africa Trust, Nairobi, Kenya

About Biovision Africa Trust (BvAT)

- BvAT based in Nairobi, Kenya, is a pan African organization established in 2009 with a vision for a food secure African continent with healthy people living in a healthy environment.

- Supports knowledge management, dissemination of information and knowledge and building capacity of farmers and partners to promote uptake of interventions in human, animal, plant, and environmental health.

- Based within the International Centre of Insect Physiology and Ecology (*icipe*) in Nairobi collaborating with various local, national, regional and international partners including the CGIAR centres.

- It is the AU Secretariat for the AU EOA Initiative Continental Secretariat.

Biovision Africa Trust

Multistakeholder Forums for Boosting the Organic Sector

eoa
ECOLOGICAL ORGANIC AGRICULTURE
Growing Sustainably

2023 Eastern Africa Agroecology Conference held in Nairobi

2019 International Conference on Agroecology held in Nairobi

Africa: Organic Agriculture in Africa in 2022

- More than **2.7 million hectares** of farmland were organic in Africa in 2022 - Over 2.8 percent of the world's organic farmland was in Africa.

- We had more than **975'000 organic producers** in Africa, with **Uganda** having the largest numbers (**more than 400'000**).

- Four countries lead with the largest organic area: **Uganda lead with more than 505'000** hectares of farmland area under organic management, followed by **Tanzania (over 313'000 hectares), Ethiopia (over 238´000 hectares**) and **Tunisia (nearly 228´000 hectares**).

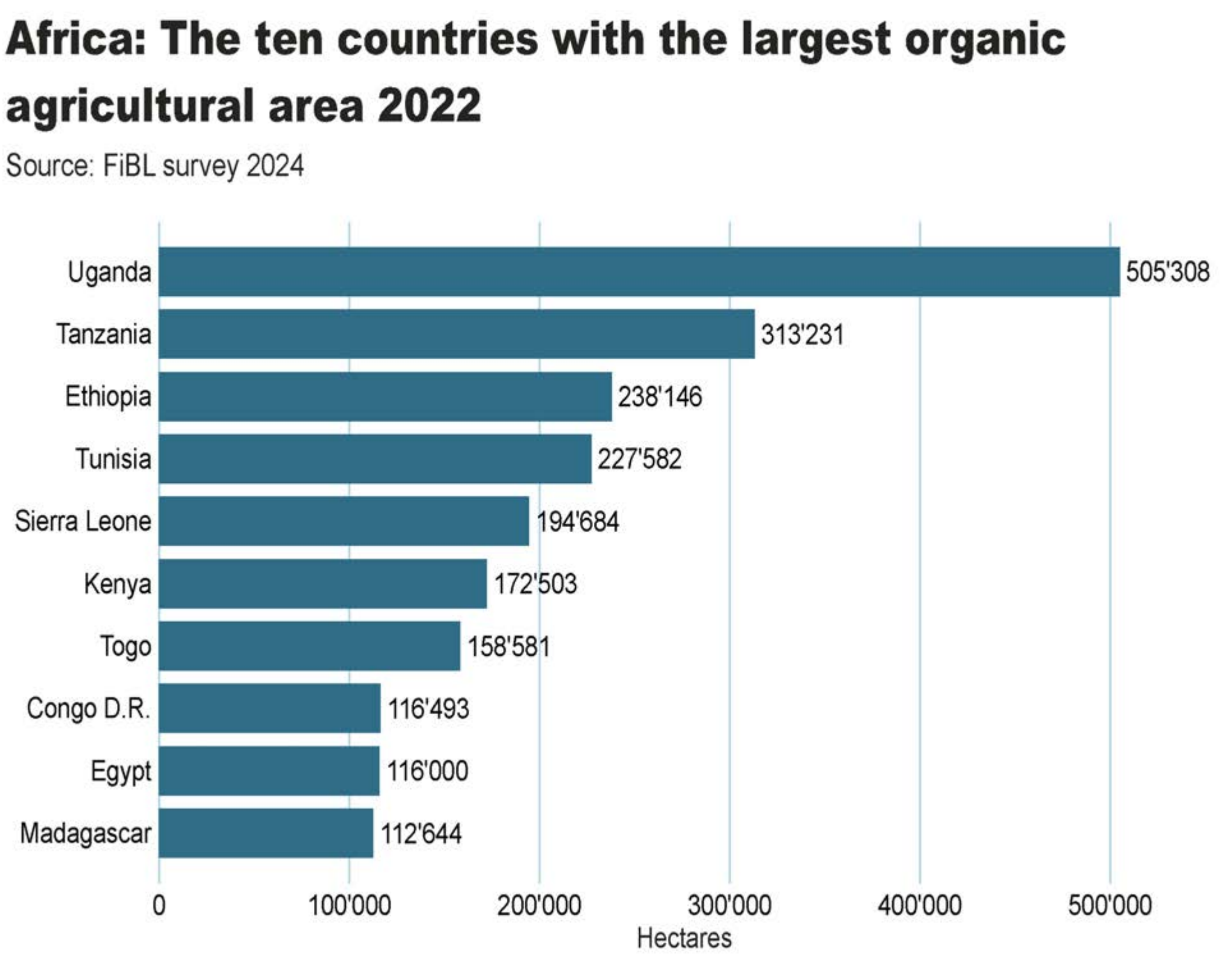
- **Sao Tomé and Principe** had the highest organic area of **21.1 percent**, making it one of the world's 21 countries with an organic area share of more than 10 percent of total farmland. It was followed by **Sierra Leone (4.9%)**, and **Réunion (4.6%)**.

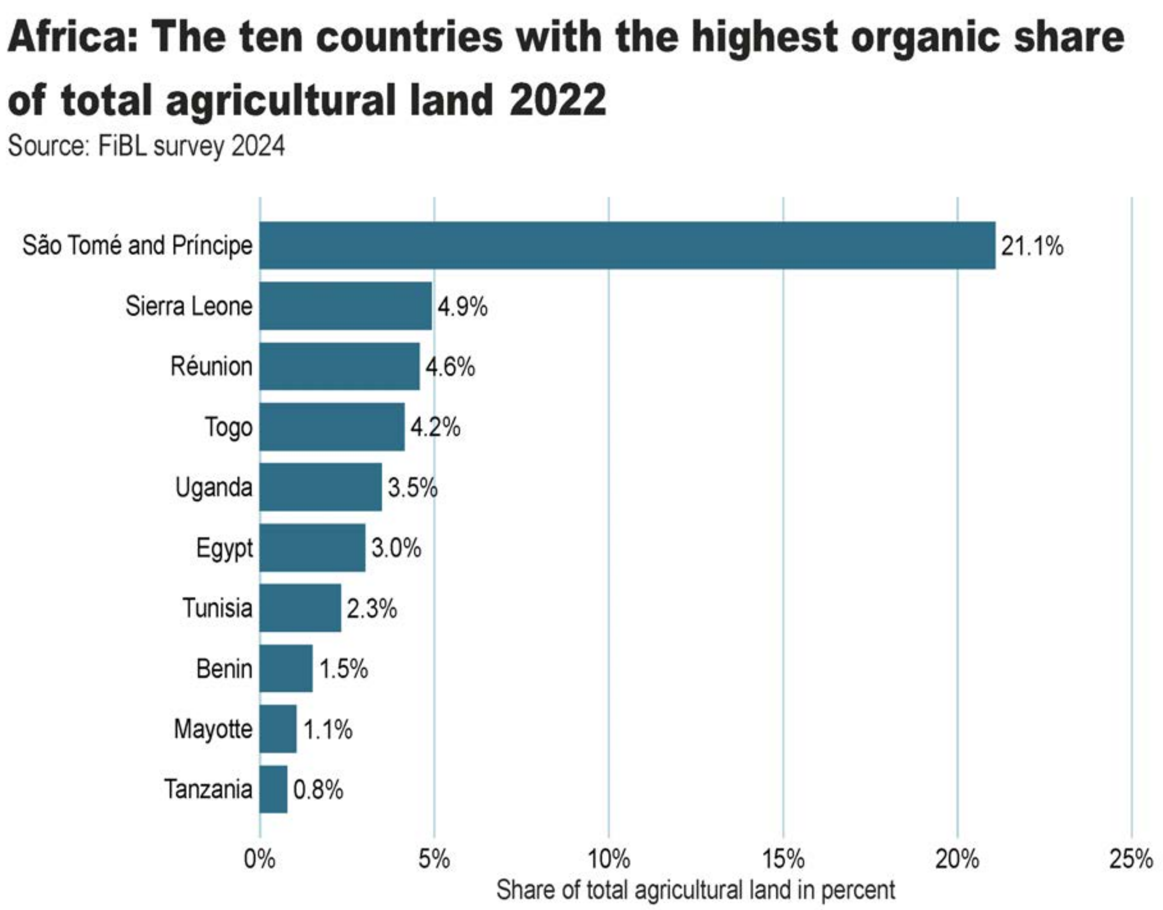
- Most certified organic produce is for **export markets to EU and US markets**.

- Domestic markets for organic products exist but data capture has not been given attention.

(Source: FiBL survey 2024)

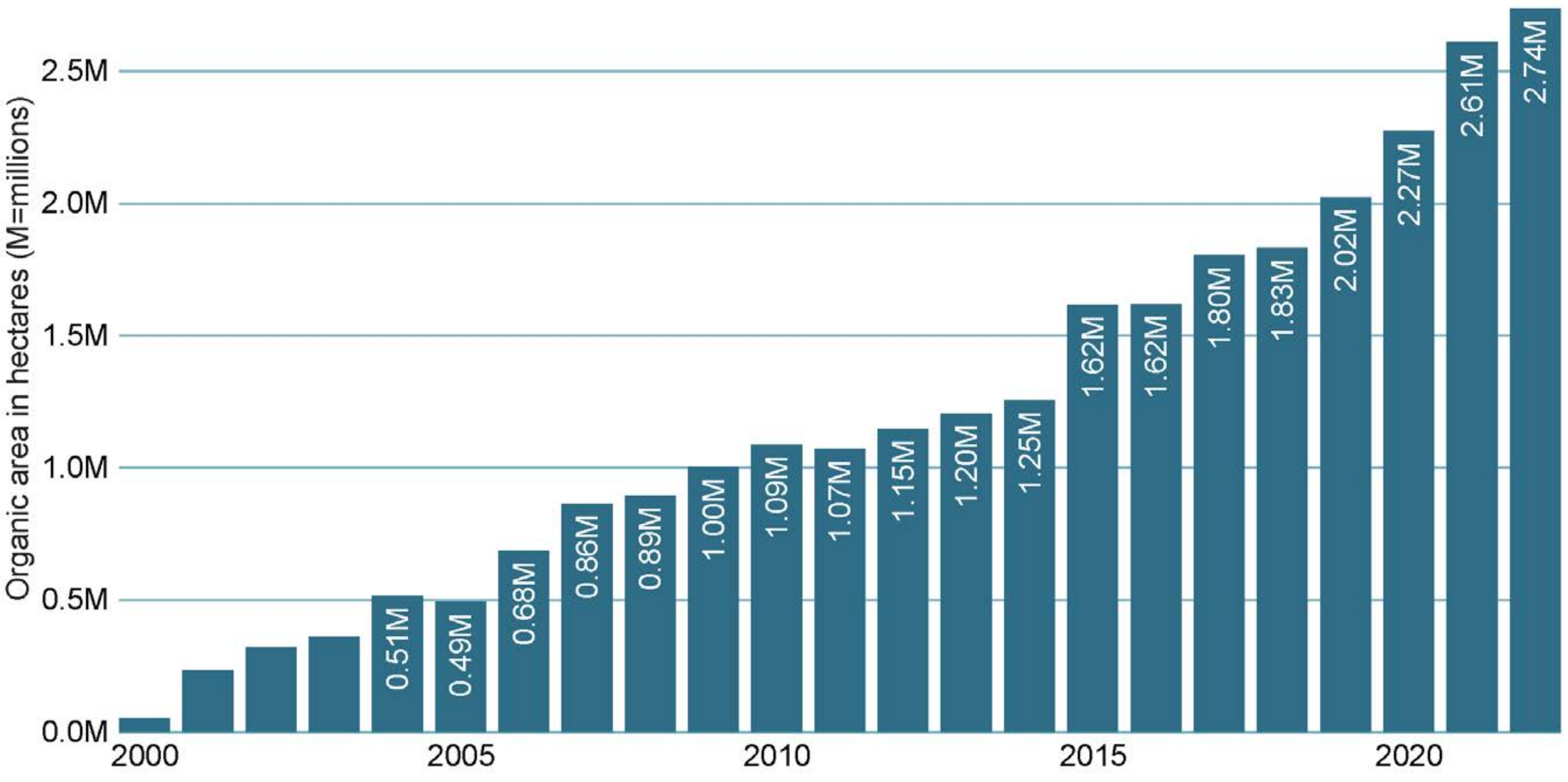
Ten Africa Countries with Largest Organic Land



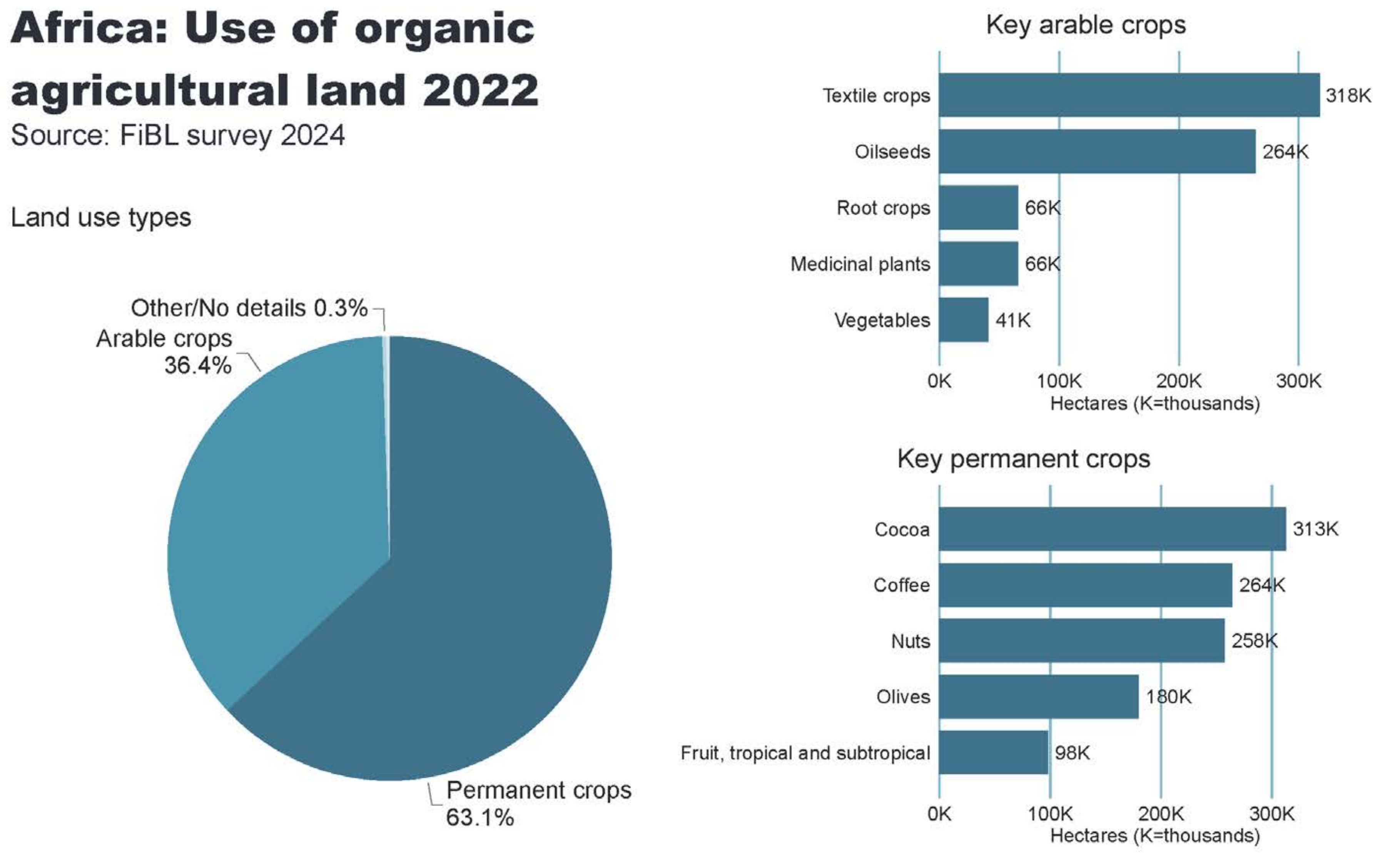


Africa: Development of organic agricultural land 2000 - 2022

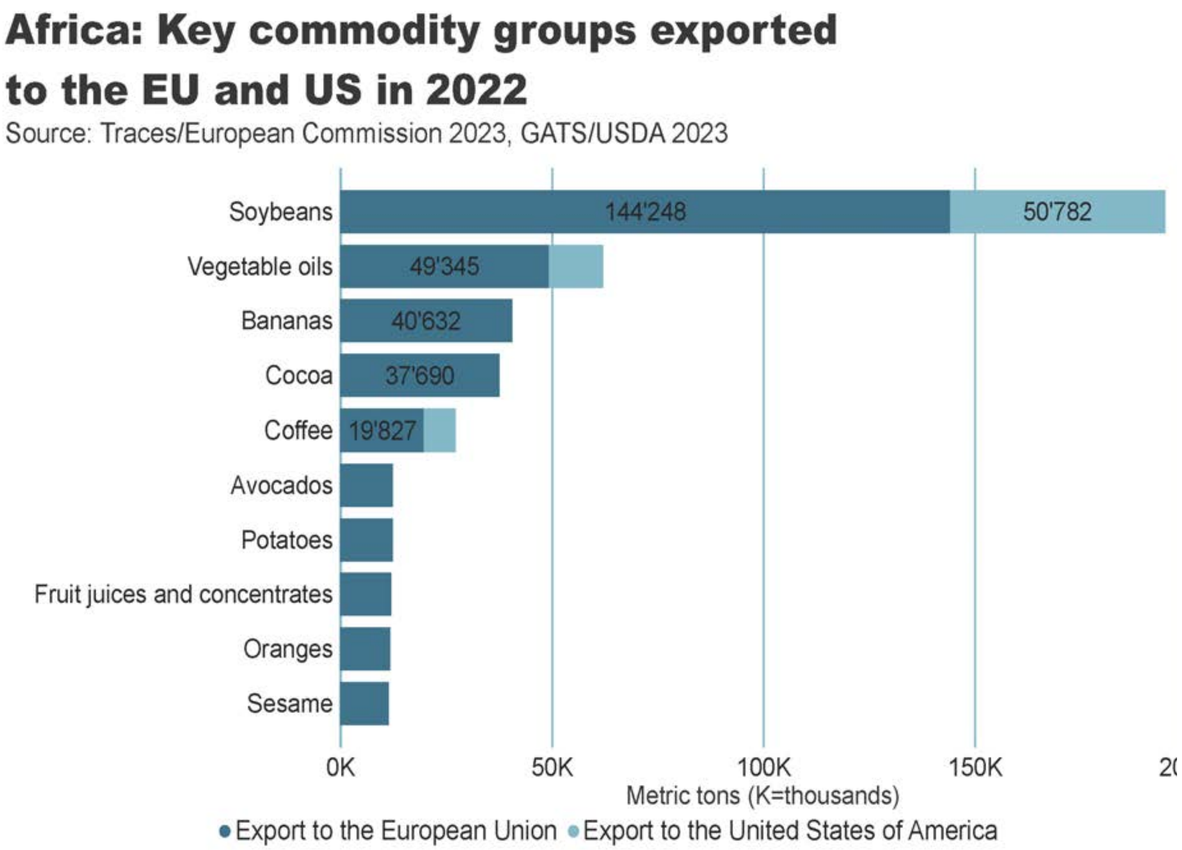
Source: FiBL-IFOAM-SOEL surveys 2001-2024

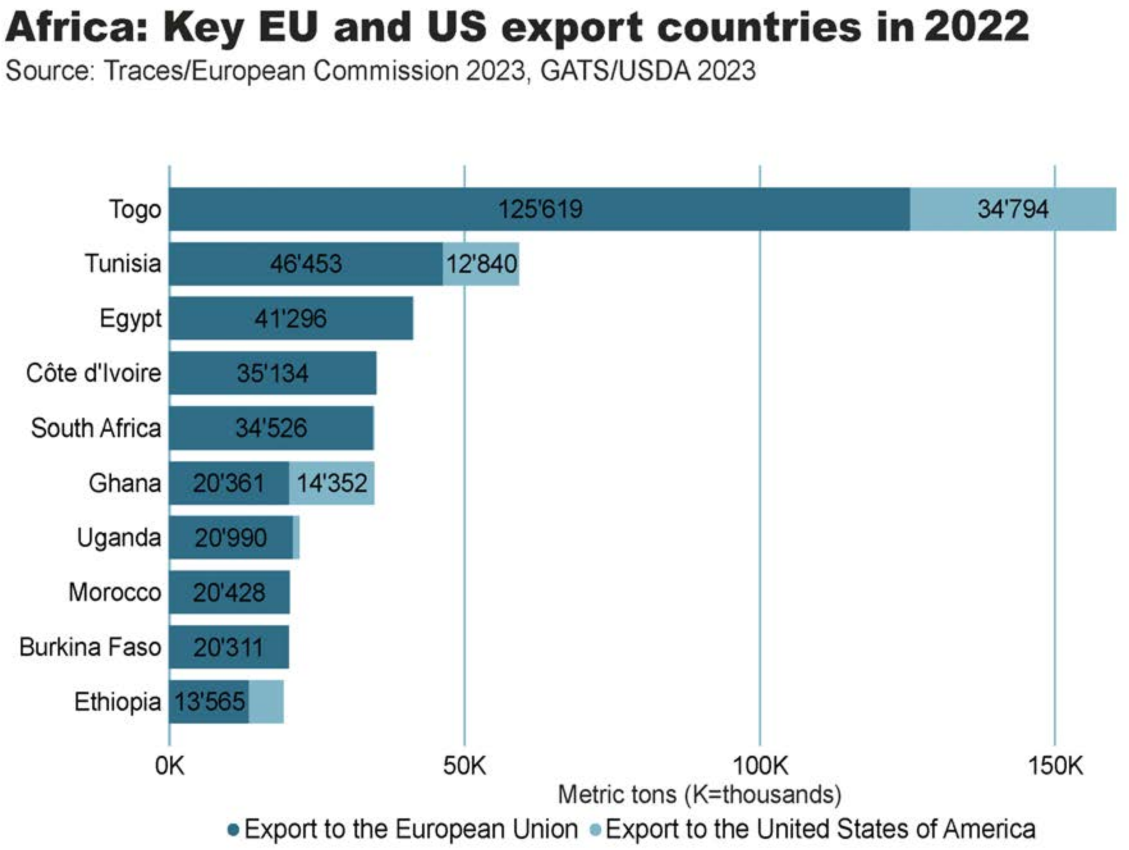


Use of Organic Agricultural Land in 2022



Organic Exports to EU and US Markets in 2022





Progress & Opportunities for Organic Growth

- Efforts to gather reliable organic agriculture data in Africa are ongoing, including the development of indicators of key parameters of agriculture integrated into reporting processes (Comprehensive Africa Agriculture Development Programme-CAADP – Biennial Review Process) and improve data collection for the future.
  - Organic fertilizer use.
  - Agriculture area under EOA practices in hectares.
  - Seed performance index and status of farmer managed seed systems in national seed policy instruments and institutional arrangements.
- Data on markets and consumption will be focal in upcoming initiatives including the Agroecology Promotion Programme for SSA.
- Optimization on opportunities for growing markets and trade on the continent – data focus.
- Forums for sharing data on innovations and technology, productivity, markets, nutrition and food security.

Biovision Africa Trust

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Growing Sustainably

Acknowledgement

Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Agency for Development and Cooperation SDC

german cooperation
DEUTSCHE ZUSAMMENARBEIT

Implemented by giz

Swedish Society for Nature Conservation

African Union

icipe

FiBL

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Thank you!

Visit our booth
Hall 3A - 517