Global Organic Market Overview

Wed
Feb 15
14:30-16:00
Our Panel

Moderation

Marco Schlüter
Interim Executive Director
IFOAM – Organics International

Speakers

Helga Willer
Leader of the Group Project communication
FiBL - Research Institute Organic Agriculture

Tia Loftsgard
Executive Director
Canada Organic Trade Association

Karen Mapusua
President
IFOAM - Organics International

Miyoshi Satoko
World Board Member
IFOAM - Organics International

Julia Lernoud
Vice President
IFOAM - Organics International

David Amudavi
Executive Director
Biovision Africa Trust (via Zoom)
Organic Agriculture Worldwide 2021

Organic Farmland
- 17.8M ha
- 6.5M ha
- 3.8M ha
- 9.8M ha

Organic Producers
- The number of organic producers is increasing
- 3.7M organic farmers (million)

Organic Market
- The global market is growing and consumer demand is increasing
- Over 124.8 billion euros
- Global organic food market in billion euros

Imports/Exports
- Organic imports into the European Union (EU) and the United States® (US)
- 4.7M total organic imports to the EU and US® in million metric tons (MT)

Farmland in million (M) hectares
- 76.4M ha
- Growth 2020/2021: 1.7%
- 191 countries with organic farming

Number of producers
- Top 3 countries:
  - Australia: 35.7M
  - India: 190.9M
  - Uganda: 40,4246
  - France: 2.8M

Imports to the EU and US in metric tons
- Top 3 commodities:
  - Bananas: 1,275,575
  - Soybeans: 353,808
  - Sugar: 341,891

Market in billion euros
- Top 3 countries:
  - USA: 48.6
  - Germany: 15.9
  - France: 12.7

Market growth in percent
- Top 3 countries:
  - Estonia: 21.0%
  - Luxembourg: 15.3%
  - Canada: 11.0%

Source: FiBL survey © 2023
WORLD: ORGANIC FARMLAND 2021

In Oceania there were 36.0 million (M) hectares (ha), in Europe 17.8 million ha and in Latin America 9.9 million ha.

The ten countries with the largest organic agricultural areas represented 78% of the world’s organic agricultural land.

20 countries had 10% or more of their agricultural land under organic management.

In 2021, 1.3 million hectares more were reported compared with 2020.

Distribution of organic agricultural land by region 2021.

The five countries with the largest areas of organic agricultural land 2021.

Top 5 countries with more than 10% of organic agricultural land 2021.


Source: FiBL 2023 www.organic-world.net - statistics.fibl.org
WORLD: ORGANIC RETAIL SALES 2021

The largest single market was the USA with 48.6 billion (bn) €, followed by the European Union (46.7 bn €). By region, Europe had the lead (54.5 bn €), followed by Northern America (53.9 bn €) and Asia (13.7 bn €).

The countries with the largest markets for organic food were the USA with 48.6 billion (bn) €, Germany (15.9 bn €), France (12.7 bn €) and China (11.3 bn €).

Switzerland had the highest per capita consumption worldwide, followed by Denmark, Luxembourg, Austria and Sweden.

The highest organic share of the total market was in Denmark, followed by Austria, Luxembourg, Switzerland, and Sweden.

Distribution of retail sales by region 2021.

The five countries with the largest markets for organic food in 2021.

Top five countries with the highest per capita consumption 2021.

The five countries with the highest organic shares of the total market in 2021.

Source: FiBL 2023 www.organic-world.net - statistics.fibl.org
Recent European market trends

Helga Willer, Jan Travnicek and Bernhard Schlatter, FiBL

February 15, 2022 – BIOFACH
The World of Organic Agriculture 2023


- Data tables
- Country and continent reports
- Markets, standards, policy support
- The book can be ordered or downloaded at (item number 1254): https://www.fibl.org/en/shop-en

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

1. Latest data
   a. Area
   b. Retail sales
   c. Imports

2. Current Trends
   a. Post pandemic
   b. War in Ukraine

3. Outlook
Organic Agriculture Worldwide 2021

Organic Farmland
- 76.4M ha organic farmland in million (M) hectares (ha)
- 1.7% growth 2020/2021
- 191 countries with organic farming

Organic Producers
- The number of organic producers is increasing
- 3.7M organic farmers (million)
- 4.9% increase from 2020

Organic Market
- The global market is growing and consumer demand is increasing
- Over 124.8 billion euros global organic food market

Imports/Exports
- Organic imports into the European Union (EU) and the United States (US)
- 4.7M total organic imports to the EU and US in million metric tons (MT)

Farmland in million (M) hectares Top 3 countries
- Australia 35.7M
- Argentina 4.1M
- France 2.8M

Number of producers Top 3 countries
- India 15.9M
- Pakistan 10.2M
- Indonesia 7.8M

Market growth in percent Top 3 countries
- Estonia 21.0%
- Singapore 19.3%
- Luxembourg 16.5%

Market in billion euros Top 3 countries
- USA 48.6
- Germany 15.9
- France 12.7

Imports to the EU and US in million MT Top 3 countries
- Ecuador 0.584M
- Mexico 0.425M
- Peru 0.344M

Imports to the EU and US in metric tons Top 3 commodities
- Bananas 1275575
- Soybeans 3537808
- Sugar 341891

*US organic imports: selected commodities only

FiBL Source: FiBL survey ©2023
Europe: Organic agricultural land by country 2021

Source: FiBL-AMI survey 2023

- France: 2,776,554 hectares
- Spain: 2,635,442 hectares
- Italy: 2,186,159 hectares
- Germany: 1,802,231 hectares
- Austria: 679,119 hectares
- Russia: 655,457 hectares
- Sweden: 606,669 hectares
- Romania: 578,718 hectares
- Czechia: 558,124 hectares
- Greece: 534,629 hectares
Europe: Organic shares of total agricultural land 2021

Source: FiBL-AMI survey 2023

<table>
<thead>
<tr>
<th>Country</th>
<th>Organic Shares</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liechtenstein</td>
<td>40.2%</td>
</tr>
<tr>
<td>Austria</td>
<td>26.5%</td>
</tr>
<tr>
<td>Estonia</td>
<td>23.0%</td>
</tr>
<tr>
<td>Sweden</td>
<td>20.2%</td>
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<tr>
<td>Switzerland</td>
<td>17.4%</td>
</tr>
<tr>
<td>Italy</td>
<td>16.7%</td>
</tr>
<tr>
<td>Czechia</td>
<td>15.8%</td>
</tr>
<tr>
<td>Latvia</td>
<td>14.8%</td>
</tr>
<tr>
<td>Finland</td>
<td>14.4%</td>
</tr>
<tr>
<td>Slovakia</td>
<td>11.7%</td>
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<tr>
<td>European Union</td>
<td>9.63%</td>
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<tr>
<td>EU-14</td>
<td>11.23%</td>
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<td>EU-13</td>
<td>6.22%</td>
</tr>
<tr>
<td>EFTA</td>
<td>6.57%</td>
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</tbody>
</table>
Europe and the European Union: Development of organic agricultural land 2000 - 2021

Source: FiBL-AMI surveys 2001-2023, based on the national data sources and Eurostat
Reaching an organic share of 25% of total farmland in the EU

• Farm-to-Fork-Strategy

• “Organic farming is an environmentally-friendly practice that needs to be further developed. The Commission will boost the development of EU organic farming area with the aim to achieve 25% of total farmland under organic farming by 2030.” (European Commission)

• Instruments:
  • Organic Action Plan (23 actions, including more research)
  • National Strategic Plans as (SPs) part of the Common Agricultural Policy (CAP)
  CAP National Strategic Plans should develop and support organic farming. A detailed analysis of the CAP SPs 2023–2027 and how they support organic agriculture will be published in spring 2023 as part of OrganicTargets4EU’s project.
EU: Growth of organic agricultural land and organic share 2000 - 2021

Source: FiBL-IFOAM-SOEL surveys 2001-2023
Europe: Growth rates for organic agricultural land in Europe and the European Union 2000 - 2021

Source: FiBL-AMI surveys 2001-2023, based on national data sources and Eurostat
Organic farmland area 2020 and 2021

Source FiBL survey

Area growth for select countries

France: 2.78 million hectares
Italy: 2.19 million hectares
Germany: 1.80 million hectares
Switzerland: 0.18 million hectares
European Union: Organic agri-food import to the European Union 2021

Source: Traces/European Commission 2022

Importing countries (imports in metric tons)

Importing countries (exports in metric tons)

Exporting countries (exports in metric tons)

The development of total organic imports to the European Union 2020 in metric tons
European Union: Main product categories of EU organic agri-food imports 2021

Source: Traces/European Commission 2023

- Fruit, tropical and subtropical: 802'811 metric tons
- Vegetable and animal oils and fats: 312'333 metric tons
- Oilseeds: 255'556 metric tons
- Sugar: 209'039 metric tons
- Fruit, berries and nuts: 171'172 metric tons
- Cereals: 163'281 metric tons
- Coffee: 134'601 metric tons
- Grain mill products: 116'665 metric tons
- Cocoa: 76'911 metric tons
- Fruits and vegetables, processed: 72'887 metric tons
Europe: Organic retail sales by country 2021

Source: FiBL survey 2023

<table>
<thead>
<tr>
<th>Country</th>
<th>Sales (Million euros)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>15,870</td>
</tr>
<tr>
<td>France</td>
<td>12,659</td>
</tr>
<tr>
<td>Italy</td>
<td>3,943</td>
</tr>
<tr>
<td>Switzerland</td>
<td>3,705</td>
</tr>
<tr>
<td>UK</td>
<td>3,461</td>
</tr>
<tr>
<td>Sweden</td>
<td>2,764</td>
</tr>
<tr>
<td>Spain</td>
<td>2,528</td>
</tr>
<tr>
<td>Austria</td>
<td>2,397</td>
</tr>
<tr>
<td>Denmark</td>
<td>2,240</td>
</tr>
<tr>
<td>Netherlands</td>
<td>1,374</td>
</tr>
</tbody>
</table>
Europe: Distribution of retail sales by country 2021
Source: FiBL-AMI survey 2023

- Germany: 29%
- France: 23%
- Italy: 7%
- Switzerland: 7%
- United Kingdom: 6%
- Sweden: 5%
- Spain: 5%
- Austria: 13%

Others: 8%

World: Retail sales by single market 2021
Source: FiBL-AMI survey 2023

- United States of America: 39%
- European Union (EU-27): 38%
- China: 8%
- Canada: 4%
- Switzerland: 3%

Others: 8%
Europe: The countries with the highest per capita consumption 2021

Source: FiBL-AMI survey 2023

- Switzerland: 425 euros
- Denmark: 384 euros
- Luxembourg: 313 euros
- Austria: 268 euros
- Sweden: 266 euros
- Liechtenstein: 230 euros
- Germany: 191 euros
- France: 187 euros
- Belgium: 122 euros
- Norway: 83 euros

Per capita consumption in euros
Europe: The countries with the highest shares of the total retail sales 2020 and 2021

Source: FiBL-AMI survey 2023
Europe and the European Union: Growth of organic retail sales 2000 - 2021

Source: FiBL-AMI surveys 2001-2023
Europe: The countries with the highest organic market growth 2021

Source: FiBL-AMI survey 2023

- Estonia: 21.0%
- Luxembourg: 15.3%
- Austria: 5.8%
- Germany: 5.8%
- UK: 5.2%
- Belgium: 4.6%
- Switzerland: 3.9%
- Ireland: 2.7%
- Bulgaria: 2.5%
- Netherlands: 0.9%
Postpandemic and war in Ukraine

• 2021
  • The pandemic continued to sustain organic markets in many European countries in 2021, but not to the same extent as in the first Corona year of 2020, when the market grew by 15 percent. (2021: +3.8%)
  • In addition, normal life returned in many countries in the second half of the year. People cooked less at home and travelled more.

• 2022
  • The cost of living went up in many countries, with inflation reaching unprecedented levels of 10 percent and people saved on food.
  • Nevertheless, buying organic remains a relevant topic; however, people are trying to buy organic products cheaper.
After the lockdown years, consumers are spending less money on food for consumption at home.
Conclusions

• Data show that in 2021 in Europe the organic farmland and market continued to grow, even though slower than in the previous years. Imports remained stable, however with a shift towards tropical products.

• Only few data were available for 2022 in February 2023; it remains to be seen how the organic market and area will developed that year - characterised by inflation and higher energy prices.

• 2023 is expected to be a challenging year for the organic sector.

• To reach the EU Farm to Fork target of 25 percent organic farmland in the European Union by 2030, appropriate and timely support measures are needed.
Organic Agriculture in Europe 2021

Organic Farmland

- Organic farmland in million (M) hectares (ha):
  - 2.8M ha in France
  - 2.6M ha in Spain
  - 2.2M ha in Italy

- Growth 2020/2021:
  - 4.4%
  - 3.6% Organic share of total farmland

Organic Producers

- The number of organic producers is increasing:
  - 442'274 organic producers

- Growth 2020/2021:
  - 5.8%

Organic Market

- The European market is growing:
  - Europe’s organic retail sales in billion euros: 54.5
  - Per capita spending in euros: 66
  - Organic market growth 2020/2021: 3.8%

Market in billion euros
Top 3 countries

- Germany: 15.9
- France: 12.7
- Italy: 3.9

Market growth in percent
Top 3 countries

- Estonia: 21.0
- Luxembourg: 15.3
- Austria: 5.8

Source: FiBL survey © 2023
Kontakt

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• Tel. +41 79 218 0626, Fax +41 62 865 7273
• helga.willer@fibl.org

• http://www.organic-world.net/yearbook/yearbook-2023.html
FiBL online

www.fibl.org

www.bioaktuell.ch

fiblfilm

@fiblorg

@FiBLaktuell

linkedin.com/company/fibl
North America Organic by the Numbers

Tia Loftsgard, Executive Director
Biofach February 15, 2023
Canada Organic Trade Association

Strategic Areas of Focus:

- MARKET ACCESS
- MARKET RESEARCH
- EDUCATION
- GOVERNMENT RELATIONS
Canadian Organic Market

$9.35 Billion CAD Annual Sales

80% of total is Food and Beverage $7.236 Billion CAD
Organic Market

Fibre & textiles has 2.5% market share

10.2% growth of the non-food sector
Northern America: The countries with the highest organic retail sales in 2021
Source: FiBL-AMI survey 2023
On average, Canadians spend $184 weekly on organic groceries. Canadian consumers are buying 11% more organic than a year ago. 23% of Canadians say they trust Canada Organic Certified.
Organic Trade: Imports

2017: $685.92M  
2018: $742.31M  
2019: $789.10M  
2020: $832.11M  
2021: $859.67M

*60% of imports are from the USA

$859.7M

2021 HS Code Statistics Canada Data
Organic Trade: Exports

2017: 461.3M
2018: 384.0M
2019: 461.0M
2020: 607.9M
2021: 417.3M

2021 HS Code Statistics Canada Data
Norther America: Key EU and US export countries in 2022

Source: Traces/European Commission 2022, GATS/USDA 2022

- **Canada**: 30,610 metric tons
- **USA**: 11,898 metric tons

Metric tons (K=thousands)

- Export to the European Union
- Export to the United States of America
Northern America: Key commodity groups exported to the EU and US in 2021

Source: European Commission 2021, US AT/USDA 2022

- Soybeans: 82,048,000 Metric tons (K=1,000,000)
- Vegetable oils: 57,659,000 Metric tons
- Bananas: 44,034,000 Metric tons
- Cocoa: 33,233,000 Metric tons
- Coffee: 18,546,000 Metric tons
- Potatoes: 14,613,000 Metric tons
- Sesame: 12,371,000 Metric tons
- Fruits and vegetable concentrates: 11,434,000 Metric tons
- Sweet potatoes and sweet potato tubers: 10,550,000 Metric tons
- Avocados: 10,408,000 Metric tons
North America has the largest number of countries with the largest number of producers. The USA leads with 16,476 producers, followed by Canada with 6,916 producers.
North America: Organic share of total agricultural land 2021

Source: COTA\land  SDA  0-3

<table>
<thead>
<tr>
<th>Country</th>
<th>Share of total agricultural land in percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>2.1%</td>
</tr>
<tr>
<td>USA</td>
<td>0.6%</td>
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</table>
Northern America: Development of organic agricultural land 2000 - 2021
Source: COTA and USDA, 2023
Northern America: Organic agricultural area 2021

Source: COTA and USDA

<table>
<thead>
<tr>
<th>Country</th>
<th>Agricultural Area (Hectares)</th>
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<tbody>
<tr>
<td>USA</td>
<td>2,326,551</td>
</tr>
<tr>
<td>Canada</td>
<td>1,215,589</td>
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</table>

Hectares
Canadian Organic Operators

7998 Operators in 2021
374 newly certified
Canada Operators Breakdown

2021 data

- Processors: 21%
- Livestock Operations: 9%
- Growers: 70%
Canada Organic Operators

5% Growth year over year
Canadian Organic Acreage Transitioned 2021

37,330
New acres in 2021
Canadian Organic Acreage

3.087 Million Acres in 2021

368,000 acres is maple
Annual Growth by Category
2015-2021

- Processors: 19%
- Growers: 54%
- Livestock Operations: 27%
Cereals Breakdown 2021

- Wheat: 43.7%
- Oats: 38%
- Barley: 9.2%
- Other cereals*: 5.4%
- Rye: 3.6%
Oilseeds Breakdown 2021

- Soybean: 43.7%
- Flax: 39%
- Mustard: 9%
- Other oilseeds: 8.2%
Organic Growers

6102 Organic Farmers in 2021

130 newly certified

2% growth year over year
Organic Growers

Year | Organic Growers
--- | ---
2015 | 3961
2016 | 4222
2017 | 4801
2018 | 5468
2019 | 5656
2020 | 5972
2021 | 6102
Organic Processors

1827 Processors in 2021

8 newly certified

.44% growth year over year
Organic Processors

<table>
<thead>
<tr>
<th>Year</th>
<th>Value</th>
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<tbody>
<tr>
<td>2015</td>
<td>1539</td>
</tr>
<tr>
<td>2016</td>
<td>1765</td>
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<tr>
<td>2017</td>
<td>1920</td>
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<tr>
<td>2018</td>
<td>1717</td>
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<tr>
<td>2019</td>
<td>1799</td>
</tr>
<tr>
<td>2020</td>
<td>1819</td>
</tr>
<tr>
<td>2021</td>
<td>1827</td>
</tr>
</tbody>
</table>
Organic Livestock Operators

784 Livestock Operators in 2021

15 decertified voluntarily or mandatorily

-2% decline
Organic Livestock

Year | Count
--- | ---
2015 | 617
2016 | 675
2017 | 750
2018 | 726
2019 | 814
2020 | 799
2021 | 784
Quick Facts Available on Shopify

https://canada-organic.myshopify.com/

CONSUMER PREFERENCES

23% of Canadians are buying organic more often than a year ago.

54% of Canadians say they trust certified organic.

2021 HIGHLIGHTS

130 new farmers joined organic.

5% increase across all certified operator categories.

37,300 new acres are currently transitioning to certified organic.

Consumers associate the Organic logo with:

- Non Genetically Engineered (non-GMO)
- Strong Standards
- Good for the Environment
- Free from Pesticides
- More Tasty/Healthy

SALES

$9.35 billion Canadians annual spend on organic.

$7.236 billion estimated only a 1% growth from 2020.

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TRADE

$417.3M

100% of imports are from the USA

$859.7M

HIGHLIGHTS

130 new farmers joined organic.

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37,330 new acres are currently transitioning to certified organic.

CERTIFIED OPERATORS

7.9K

Certified Organic Operations

6.1K

Organic Producers by Province

1.8K

Certified Producers

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The Organic Market in Asia

The growth of the organic sector

MIYOSHI Satoko
World Board member
IFOAM – Organics International
Asia – Snapshot 2021

- Over **1.7 million organic producers** (1.6 Million in India)
- More than **6.5 million hectares** (9% of global organic land, increased by 356,000 ha)
- **Timor-Leste** is highest organic area share by 8.5%, followed by south Korea and Sri Lanka
- Cereals, oilseeds and textile crops are the key crop
- Export most to EU, lead by India, while domestic market is growing
- Oilcake is the most important export product
- High interest for **PGS**

Source: FiBL survey 2023
Asia: Development of organic agricultural land
2000 - 2021
Source: FiBL-IFOAM-SOEL surveys 2001-2023

Stable growth in organic land. Most of producers are in India.

Asia: The ten countries with the largest number of organic producers 2021
Source: FiBL survey 2023
Timor-Leste is leading the highest organic share by 8.5%, South Korea and Sri Lanka about 2.5%.

Asia: The ten countries with the highest organic share of total agricultural land 2021
Source: FiBL survey 2023

- Timor-Leste: 8.5%
- South Korea: 2.5%
- Sri Lanka: 2.4%
- Singapore: 2.2%
- Philippines: 1.7%
- Taiwan: 1.5%
- India: 1.5%
- United Arab Emirates: 1.4%
- Palestine: 1.2%
- Bhutan: 1.1%

China and India covers large area of organic agriculture

Source: FiBL survey 2023
More than 50% of organic land used for Arable crops. Cereals are the top followed by oilseeds and textile crops.

Source: FiBL survey 2023
EU is the biggest partner for exporting from Asia. India exports the most while their local demand is increasing.

Source: FiBL survey 2023
Asia: The countries with the highest organic retail sales in 2021

Source: FiBL-AMI survey 2023

China leads the region. Followed by Japan and South Korea.

Raising domestic market in many countries.
Insight of Japanese market
More Choice of stores

- Organic Cosmetic leading its sector
- Lifestyle driven market

8 bil yen sale retailer
Insight of Japanese market: distribution channel

Domestic producers
- Teikei, CSA (7.2%)
- Marche, farm stands (3.5%)
- Specialty retailers, Box-schemes (22.1%)
- Specialty wholesalers (19.1%)
- Processors (1.9%)
- Farmers’ coop (20.9%)
- Wholesalers (5.9%)
- Traders (4.7%)

Total 203 Billion Yen

End consumers
- COOP (49.4%)
- Natural stores (7.7%)
- Supermarket, department (4.9%)
- Deli, prepared foods (21.4%)
- Restaurants, hotels (7.0%)
- Imports (1.9%)
- Exports (7.2%)

Export and Import
- (7.0%) (22.1%)
- (3.5%) (19.1%)
- (0.8%) (4.7%)
- (3.5%) (20.9%)
- (0.05%) (5.9%)
- (1.9%) (4.7%)
- (1.9%) (20.9%)

The Organic Market in Latin America

The resilience of the organic sector

Julia Lernoud
Vice president
IFOAM – Organics International
Latin America and Caribbean – Snapshot 2021

- Nearly **300’000 organic producers**, nearly 20´000 more organic producers than in 2020
- Nearly **9.9 million hectares** (13% of global organic land but only 1.4% of the agricultural land in the region, 1.6% in 2020). Unfortunately, the agricultural land has decreased by nearly 70´000 ha
- **Argentina** (4 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%**, 7th in the world
- 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 2023
There is still a lot of growth potential in the region.

Industrial agriculture has a big lobby power in Latin America.

Some countries are big players in the global organic trade.

**Latin America and Caribbean: The ten countries with the largest organic area 2021**

Source: FiBL survey 2023

<table>
<thead>
<tr>
<th>Country</th>
<th>Hectares</th>
</tr>
</thead>
<tbody>
<tr>
<td>Argentina</td>
<td>4,074,804</td>
</tr>
<tr>
<td>Uruguay</td>
<td>2,741,845</td>
</tr>
<tr>
<td>Brazil</td>
<td>1,482,406</td>
</tr>
<tr>
<td>Peru</td>
<td>374,926</td>
</tr>
<tr>
<td>Mexico</td>
<td>238,075</td>
</tr>
<tr>
<td>Bolivia</td>
<td>179,425</td>
</tr>
<tr>
<td>Chile</td>
<td>152,773</td>
</tr>
<tr>
<td>Dominican Republic</td>
<td>117,312</td>
</tr>
<tr>
<td>Paraguay</td>
<td>113,147</td>
</tr>
<tr>
<td>Colombia</td>
<td>100,874</td>
</tr>
</tbody>
</table>

**Latin America and Caribbean: The countries with the highest organic share of total agricultural land 2021**

Source: FiBL survey 2023

<table>
<thead>
<tr>
<th>Country</th>
<th>Share of total agricultural land</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uruguay</td>
<td>19.6%</td>
</tr>
<tr>
<td>French Guiana (France)</td>
<td>11.9%</td>
</tr>
<tr>
<td>Dominica</td>
<td>11.6%</td>
</tr>
<tr>
<td>Dominican Republic</td>
<td>4.8%</td>
</tr>
<tr>
<td>Falklands/Malvinas</td>
<td>2.8%</td>
</tr>
<tr>
<td>Argentina</td>
<td>2.7%</td>
</tr>
<tr>
<td>Guadeloupe</td>
<td>2.5%</td>
</tr>
<tr>
<td>Grenada</td>
<td>2.4%</td>
</tr>
<tr>
<td>Martinique</td>
<td>2.3%</td>
</tr>
<tr>
<td>Honduras</td>
<td>2.0%</td>
</tr>
</tbody>
</table>
The organic area growth has been quite stable over the year – some ups and downs mainly due to Argentina's grassland.

Peru continues to have the largest number of organic producers in Latin America and 5th worldwide!
Coffee as well as cocoa and tropical fruits are still the main crop group - Most of it is for export. However, the regional demand for these crops is increasing.

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.
A growing market with many opportunities!

- **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**
  - MoU between Brazil and Chile (2018) → Includes PGS

- **COVID effects**
  - Big increase in demand of organic products in the big cities → and continues to grow!
  - Organic sector resilience and adaptability → **Fast response** to the new and challenging situation

- **Political and social instability** in the region
  - all stakeholders need our **support**
American Samoa, Australia, Cook Islands, Federated States of Micronesia, Fiji, French Polynesia, Guam, Kiribati, Marshall Islands, Nauru, New Caledonia, New Zealand, Niue, Northern Mariana Islands, Palau, Papua New Guinea, Pitcairn Islands, Samoa, Solomon Islands, Tokelau, Tonga, Tuvalu, Vanuatu, and Wallis and Futuna.
Oceania: The ten countries with the largest number of organic producers 2021

Source: FiBL survey 2023

- Papua New Guinea: 12,827
- Samoa: 1,993
- Australia: 1,829
- Solomon Islands: 898
- New Zealand: 685
- Tonga: 81
- Vanuatu: 74
- Cook Islands: 68
- French Polynesia: 19
- Fiji: 13
Oceania: The ten countries with the largest organic agricultural area 2021

Source: FiBL survey 2023

<table>
<thead>
<tr>
<th>Country</th>
<th>Hectares</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>35,877,799</td>
</tr>
<tr>
<td>Papua New Guinea</td>
<td>88,014</td>
</tr>
<tr>
<td>Samoa</td>
<td>82,299</td>
</tr>
<tr>
<td>New Zealand</td>
<td>79,347</td>
</tr>
<tr>
<td>Fiji</td>
<td>30,194</td>
</tr>
<tr>
<td>Solomon Islands</td>
<td>8,231</td>
</tr>
<tr>
<td>Vanuatu</td>
<td>6,281</td>
</tr>
<tr>
<td>French Polynesia</td>
<td>1,592</td>
</tr>
<tr>
<td>Tonga</td>
<td>1,119</td>
</tr>
<tr>
<td>New Caledonia</td>
<td>800</td>
</tr>
</tbody>
</table>
Oceania: The ten countries with the highest organic share of total agricultural land 2021
Source: FiBL survey 2023

- Samoa: 29.1%
- Australia: 9.9%
- Papua New Guinea: 7.4%
- Fiji: 7.1%
- Solomon Islands: 7.0%
- French Polynesia: 3.5%
- Vanuatu: 3.4%
- Tonga: 3.2%
- Niue: 2.3%
- Cook Islands: 1.0%
Australia

2022 Market Report published by Australian Organic

When shoppers were introduced to the meaning of 'having a certification logo', 67% agree that an organic certification mark can enhance the level of trust in products.

90/100
Australian shoppers believe there should be legislated standards for organic practices.

63%
of shoppers recognise the Australian Certified Organic Bud certification logo.

40%
of food shoppers indicated that they would avoid purchasing an organic product if it did not display a certification mark.

1/5
Australian food shoppers say they have a high level of trust when it comes to purchasing organic product.

1/3
of those who have bought an organic product in the past year believe that they have been previously misled by 'organic' claims made on product packaging.

72%
of shoppers who typically spend 50% or more of their food budget on organic have a high level of trust.

Data and graphic copyright Australian Organic
https://issuu.com/australianorganic/docs/spring_2022
New Zealand

2020-21 Market Report conducted by Organic Aotearoa New Zealand

Key Changes 2017-2020

$723 million value for New Zealand organic sector, compared to $600 million in 2017.
20% increase, or $123 million, with an average growth rate of 6.4% per annum

- $420.4 million is export
- $302.5 million is domestic

- 58% of the organic sector output is exported and 42% is consumed locally
- Organic dairy is now the largest organic sector, with exports of $153.8 million, up 55% from 2017
- Fruit and vegetables are #2 at $143 million, up 6% from 2017
- The wine sector is #3 at $65 million, up 40% from 2017
- Organic purchases through supermarkets represent 69% of all organic sales, an increase of 13.8%

Data and graphic copyright OANZ \https://www.oanz.org/market-reports
### Pacific Islands

- No mechanism for collecting local market data
- PGS is predominant
- Export to Australia, NZ, EU, US, Asian markets growing
- Farmers markets and basket schemes developing
- Tourism and hospitality an opportunity

<table>
<thead>
<tr>
<th>Products</th>
<th>Countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vanilla, ginger &amp; other spices</td>
<td>Fiji, Vanuatu, Niue, Samoa</td>
</tr>
<tr>
<td>Cocoa</td>
<td>Vanuatu, Samoa, PNG</td>
</tr>
<tr>
<td>Virgin Coconut Oil</td>
<td>Samoa, Fiji, Solomon Islands</td>
</tr>
<tr>
<td>Coconut meal</td>
<td>Vanuatu</td>
</tr>
<tr>
<td>Nonu /noni (Morinda Citrifolia)</td>
<td>Cook Islands, Samoa, Fiji, Niue, French Polynesia</td>
</tr>
<tr>
<td>Honey</td>
<td>Niue</td>
</tr>
<tr>
<td>Bananas</td>
<td>Fiji, PNG, Samoa</td>
</tr>
<tr>
<td>Coffee</td>
<td>PNG, Samoa</td>
</tr>
<tr>
<td>Livestock( Beef, Goats and Sheep)</td>
<td>Vanuatu, Fiji</td>
</tr>
<tr>
<td>Fruit &amp; Vegetables</td>
<td>Fiji, New Caledonia, Samoa, French Polynesia</td>
</tr>
<tr>
<td>Forest nuts</td>
<td>Solomon Islands</td>
</tr>
</tbody>
</table>
Oceania: Key commodity groups exported to the EU and US in 2021

Source: Traces/European Commission 2022, GATS/USDA 2022

- Export to the European Union
- Export to the United States of America
Oceania: Key EU and US export countries in 2021
Source: Traces/European Commission 2022, GATS/USDA 2022

- New Zealand: 17,317 metric tons (K=thousands)
  - Export to the European Union: 12,269
  - Export to the United States of America: 5,048
- Papua New Guinea: 2,304 metric tons
- Australia: 352 metric tons
- French Polynesia: 193 metric tons
- Samoa: 44 metric tons
- Fiji: 36 metric tons
- Vanuatu: 16 metric tons
- New Caledonia: 2 metric tons
Thank you