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THE WORLD OF ORGANIC AGRICULTURE

STATISTICS & EMERGING TRENDS 2022

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The World of Organic Agriculture Statistics and Emerging Trends 2022

Edited by

Helga Willer, Jan Trávníček, Claudia Meier and Bernhard Schlatter

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Table of Contents

Glossary 10

Foreword from SECO 11

Foreword from FiBL and IFOAM – Organics International 12

Foreword from the Editors 13

Acknowledgements 14

ORGANIC AGRICULTURE: KEY INDICATORS AND TOP COUNTRIES 19

THE WORLD OF ORGANIC AGRICULTURE 2022: SUMMARY 20

Helga Willer, Claudia Meier, Bernhard Schlatter, Lauren Dietemann, Laura Kemper and Jan Trávníček

ORGANIC AGRICULTURE WORLDWIDE: CURRENT STATISTICS 31

Current Statistics on Organic Agriculture Worldwide: Area, Operators and Market 32
Bernhard Schlatter, Jan Trávníček, Claudia Meier and Helga Willer

› General notes on the data 35
› Organic land 37
› Organic producers and other operator types 57
› Retail sales and international trade data 64
› Organic farming in developing countries and emerging markets 69
› Land use and key commodities in organic agriculture 71

Organic Cotton 128
Textile Exchange

Statistics of the Biodynamic Federation Demeter International 133
Christoph Simpfendörfer and Sarah Fischer

GLOBAL MARKET AND ORGANIC IMPORTS 139

The Global Market for Organic Food & Drink 140
Amarjit Sahota

Imports of Organic Agri-food Products into the European Union – Summary of the EU Agricultural Market Brief on EU Organic Imports 2020 146

STANDARDS AND LEGISLATION POLICY SUPPORT 157

Worldwide Overview of Policies and Regulations on Agroecological Approaches, Including Organic 158
Xhona Hysa, Sara Anselmi, Vladyslav Zhmailo, Gábor Figeczky, Flávia Moura e Castro, and Florentine Meinshausen

Participatory Guarantee Systems in 2021 170
Sara Anselmi and Flávia Moura e Castro

Agroecology and Organic Agriculture at the UN Food Systems Summit 2021 178
Gábor Figeczky, Xhona Hysa and Ali Gülcegün

AFRICA 181

Developments in Organic Agriculture in Africa 182
David M. Amudavi, Venancia Wambua, Alex Mutungi, Moses O. Aisu and Olugbenga O. Adeoluwa

Table of Contents

Africa: Current Statistics 192
Claudia Meier, Bernhard Schlatter and Jan Trávníček

ASIA 201

Developments in the Organic Sector in Asia in 2021 202
Shaikh Tanveer Hossain, Jennifer Chang and Vic Anthony Joseph Fabre Tagupa

Asia: Current statistics 215
Claudia Meier, Bernhard Schlatter, Jan Trávníček

EUROPE 223

Organic in Europe: Recent Developments 225
Emanuele Busacca, Maria Gernert, Maria Ladinig, Bram Moeskops, Amelie Steu. Silvia Schmidt and Helga Willer

Europe and the European Union: Key indicators 2020 234

Organic Farming and Market Development in Europe and the European Union 235
Jan Trávníček, Helga Willer and Diana Schaack

LATIN AMERICA AND CARIBBEAN 271

Latin America 272
Patricia Flores

Latin America and the Caribbean: Current statistics 275
Claudia Meier, Bernhard Schlatter, and Jan Trávníček

NORTH AMERICA 283

Organic in the United States: Sales Surpass 60 Billion Dollar Mark 284
Barbara Fitch Haumann

Canada 289
Tia Loftsgard

North America: Current statistics 292
Claudia Meier, Bernhard Schlatter, and Jan Trávníček

OCEANIA 297

Australia 298
Nicole Ford

The Pacific Islands 304
Karen Mapusua

Oceania: Current statistics 308
Claudia Meier, Bernhard Schlatter and Jan Trávníček

RETROSPECTIVE AND OUTLOOK 313

Retrospective and Outlook – Transformation is happening! 314
Louise Luttikholt

Annex: Key Indicators by Country and Region 317

Annex: Data Providers and Data Sources 322

Tables

Table 1: Countries and territories covered by the global survey on organic agriculture 2020 33
Table 2: World: Organic agricultural land (including in-conversion areas) and regions' shares of the global organic agricultural land 2020 37
Table 3: World: Organic agricultural land (including in-conversion areas) by country/territory 2020 (sorted) 39
Table 4: World: Organic agricultural land (including in-conversion areas) and organic share of total agricultural land by region 2020 41
Table 5: World: Organic shares of total agricultural land by country 2020 (sorted) 43
Table 6: World: Organic agricultural land (including in-conversion areas) by region: growth 2019-2020, and 10 years growth 45
Table 7: World: Development of organic agricultural land by country 2019-2020 47
Table 8: World: Organic areas: Agricultural land (including conversion areas) and further organic areas by region in 2020 52
Table 9: World: Organic areas: Agricultural land (including conversion areas) and further organic areas by country 2020 52
Table 10: World: Development of the numbers of producers by region 2019 to 2020 57
Table 11: World: Organic producers and other operator types by country 2020 59
Table 12: Global market data: Retail sales and per capita consumption by region 2020 65
Table 13: Global market data: Retail sales, organic share of all retail sales, per capita consumption and exports by country 2020 67
Table 14: Countries on the DAC list: Development of organic agricultural land 2015-2020 70
Table 15: World: Land use in organic agriculture by region (including in-conversion areas) 2020 74
Table 16: World: Land use and crop categories in organic agriculture worldwide 2020 74
Table 17: Use of organic arable land (including in-conversion areas), 2019 and 2020 compared 75
Table 18: Use of organic permanent cropland (including in-conversion areas), 2019 and 2020 compared 77
Table 19: Wild collection and beekeeping areas by region 2019 and 2020 compared 79
Table 20: Wild collection and beekeeping areas by crop group 2020 79
Table 21: Wild collection and beekeeping areas by country 2020 81
Table 22: Number of organic beehives by country 2020 84
Table 23: Organic aquaculture: Production volume by species 2020 85
Table 24: Organic aquaculture: Production volume by country 2020 87
Table 25: World: Selected key crop groups and crops area in organic agriculture 2020 (overview including conversion areas) 88
Table 26: Cereals: Organic area by country 2020 91
Table 27: Citrus fruit: Organic area by country 2020 95
Table 28: Cocoa: Organic area by country 2020 98
Table 29: Coffee: Organic area by country 2020 101
Table 30: Dry pulses: Organic area by country 2020 104
Table 31: Temperate fruit: Organic area by country 2020 108
Table 32: Tropical and subtropical fruit: Organic area by country 2020 112
Table 33: Grapes: Organic area by country 2020 116
Table 34: Oilseeds: Organic area by country 2020 119
Table 35: Olives: Organic area by country 2020 123
Table 36: Vegetables: Organic area by country 2020 126
Table 37: Organic cotton farmers, area, and production 2019/2020 131
Table 38: Certified Demeter operations in member countries with certifying organisations (October 2021) 135
Table 39: Demeter operations certified by the International Certification Office (ICO) in other countries 136
Table 40: Demeter certified vintners and grape area worldwide (July 2020) 137
Table 41: Total agri-food import volumes by class, 2019 and 2020 147
Table 42: Organic fruit and vegetables import volumes by product category, 2019 and 2020 150
Table 43: Organic cereals, oilseeds and sugar import volumes for key product categories, 2019 and 2020 151

Table 44: Organic permanent crops (excl. fruit and nuts) import volumes by product category, 2019 and 2020 152
Table 45: Organic animal product import volumes by product category, 2019 and 2020 153
Table 46: Organic import volumes by exporting country, 2019 and 2020 154
Table 47: EU organic imports: Organic import volumes by product category, 2019 and 2020 156
Table 48: Organic regulations worldwide by region 158
Table 49: Organic regulations worldwide 166
Table 50: Participatory Guarantee Systems worldwide 2021 176
Table 51: Africa: Organic agricultural land, organic share of total agricultural land and number of organic producers 2020 197
Table 52: Africa: All organic areas 2020 198
Table 53: Africa: Land use in organic agriculture 2020 199
Table 54: Africa: Use of wild collection areas 2020 199
Table 55: Asia: Organic agricultural land, organic share of farmland, producers 2020 220
Table 56: Asia: All organic areas 2020 221
Table 57: Asia: Land use in organic agriculture 2020 222
Table 58: Asia: Use of wild collection areas 2020 222
Table 59: Europe: Organic agricultural land in Europe and the European Union 2020 237
Table 60: Europe and the European Union: Land use 2020 243
Table 61: Europe and the European Union: Key crops/crop group 2020 246
Table 62: Europe: Organic operators by country group 2020 249
Table 63: Europe and the European Union: Organic retail sales 2020: Key data 252
Table 64: Organic shares for retail sales values (euros) for selected products 2020 258
Table 65: Europe: Organic agricultural land by country 2020 264
Table 66: Europe: Conversion status of organic agricultural land 2020 265
Table 67: Europe: Land use in organic agriculture by country 2020 266
Table 68: Europe: Organic agricultural land and wild collection areas by country 2020 267
Table 69: Europe: Organic producers, processors, and importers by country 2020 268
Table 70: Europe and European Union: Organic trade 2020 269
Table 71: European Union: EU organic imports by member state 2020 (EU 27) 270
Table 72: Latin America: Organic agricultural land, organic share of total agricultural land, and number of producers 2020 280
Table 73: Latin America: All organic areas 2020 281
Table 74: Latin America: Land use in organic agriculture 2020 282
Table 75: Latin America: Use of wild collection areas 2020 282
Table 76: North America: Organic agricultural land, organic share of total agricultural land, and number of producers 2020 296
Table 77: North America: All organic areas 2020 296
Table 78: North America: Land use in organic agriculture 2020 296
Table 79: Pacific Islands: Main products with organic certification 305
Table 80: Oceania: Organic agricultural land, organic share of total agricultural land, and number of producers 2020 311
Table 81: Oceania: Land use in organic agriculture 2020 311
Table 82: Key indicators by region 2020 317
Table 83: Key indicators by country 2020 317
Table 84: Development of the number of producers and the organic area according to the Ministry of Agriculture, Livestock and Food in Brazil 341

Figures

Figure 1: World: Distribution of organic agricultural land by region 2020 38
Figure 2: World: The ten countries with the largest areas of organic agricultural land 2020 38
Figure 3: World: Countries with an organic share of the total agricultural land of at least 10 percent 2020 42
Figure 4: World: Distribution of the organic shares of the agricultural land 2020 42

Figure 5: World: Growth of the organic agricultural land and organic share 2000-2020 46
Figure 6: World: Growth of the organic agricultural land by continent 2000 to 2020 46
Figure 7: World: The ten countries with the highest increase of organic agricultural land 2020 47
Figure 8: World: Distribution of all organic areas 2020. Total: 104.9 million hectares 51
Figure 9: World: Distribution of organic producers by region 2020 (Total: 3.4 million producers) 58
Figure 10: World: The ten countries with the largest numbers of organic producers 2020 58
Figure 11: Global market for organic food: Distribution of retail sales by country 2020 65
Figure 12: Global market for organic food: Distribution of retail sales by region 2020 65
Figure 13: Global market: The countries with the largest markets for organic food 2020 66
Figure 14: Global market: The ten countries with the highest per capita consumption 2020 66
Figure 15 (left): Countries on the DAC list: The ten countries with the largest areas of organic agricultural land in 2020 70
Figure 16 (right): Countries on the DAC list: The ten countries with the highest organic shares of the total agricultural land in 2020 70
Figure 17: World: Distribution of main land use types by region 2020 72
Figure 18: World: Distribution of main land use types and key crop categories 2020 73
Figure 19: World: Development of organic arable land, permanent cropland and permanent grassland/grazing areas 2004-2020 73
Figure 20: World: Distribution of organic arable cropland by region 2020 76
Figure 21: World: Use of arable cropland by crop group 2020 76
Figure 22: World: Distribution of permanent cropland by region 2020 78
Figure 23: World: Use of permanent cropland by crop group 2020 78
Figure 24: World: Distribution of organic wild collection and beekeeping areas by region in 2020 80
Figure 25: World: The ten countries with the largest organic wild collection and beekeeping areas in 2020 80
Figure 26: World: Distribution of organic beehives by region in 2020 83
Figure 27: World: Organic aquaculture production volume: Distribution by continent and top 10 countries 2020 86
Figure 28: World: Organic aquaculture production volume: Distribution by species and key species 2020 86
Figure 29: Cereals: Organic area 2020 89
Figure 30: Cereals: Organic area 2020 90
Figure 31: Citrus fruit: Organic area 2020 93
Figure 32: Citrus fruit: Organic area 2020 94
Figure 33: Cocoa: Organic area 2020 96
Figure 34: Cocoa: Organic area 2020 97
Figure 35: Coffee: Organic area 2020 99
Figure 36: Coffee: Organic area 2020 100
Figure 37: Dry Pulses: Organic area 2020 102
Figure 38: Dry Pulses: Organic area 2020 103
Figure 39: Temperate fruit: Organic area 2020 106
Figure 40: Temperate Fruit: Organic area 2020 107
Figure 41: Tropical and subtropical fruit: Organic area 2020 110
Figure 42: Tropical and subtropical fruit: Organic area 2020 111
Figure 43: Grapes: Organic area 2020 114
Figure 44: Grapes: Organic area 2020 115
Figure 45: Oilseeds: Organic area 2020 117
Figure 46: Oilseeds: Organic area 2020 118
Figure 47: Olives: Organic area 2020 121
Figure 48: Olives: Organic area 2020 122
Figure 49: Vegetables: Distribution of organic area by crop group 2020 124
Figure 50: Vegetables: Organic area 2020 125
Figure 51: Development of organic cotton fibre production in metric tons 128
Figure 57: Development of the number of Demeter-certified farms 134
Figure 58: Development of the Demeter-certified area 134
Figure 52: Global market: Growth in global market for organic food & drink, 2000-2020 141

Table of Contents

Figure 53: United States: Increase in organic land area and food sales, 2000-2019 143
Figure 54: EU organic import volumes: Organic agri-food imports by country 2020 (top ten) 149
Figure 55: EU organic import volumes: Top 10 countries exporting to the European Union 149
Figure 56: Development of PGS-certified producers worldwide 171
Figure 59: Africa: The ten countries with the largest organic agricultural area 2020 195
Figure 60: Africa: The countries with the highest organic share of total agricultural land 2020 195
Figure 61: Africa: Development of organic agricultural land 2000-2020 196
Figure 62: Africa: Use of organic agricultural land 2020 196
Figure 63: Asia: The ten countries with the largest organic agricultural area 2020 218
Figure 64: Asia: The countries with the highest organic share of total agricultural land 2020 218
Figure 65: Asia: Development of organic agricultural land 2000 to 2020 219
Figure 66: Asia: Use of organic agricultural land 2020 219
Figure 67: European Union: Growth of organic farmland and retail sales 2000–2020 compared 225
Figure 68: Europe and European Union: Distribution of organic farmland by country 2020 237
Figure 69: Europe: Organic agricultural land by country 2020 238
Figure 70: Europe: Organic shares of total agricultural land 2020 240
Figure 71: Europe and the European Union: Development of organic agricultural land 2000-2020 241
Figure 72: Europe: Growth rates for organic agricultural land in Europe and the European Union 2000-2020 241
Figure 73: Europe: The ten countries with the highest growth in organic agricultural land in hectares and relative growth in 2020 242
Figure 74: Europe and European Union: Distribution of land use in organic agriculture 2020 244
Figure 75: Europe: Land use in organic agriculture - top 10 countries 2020 245
Figure 76: Europe: Growth in organic agricultural land by land use type 2004-2020 245
Figure 77: European Union: Growth in organic agricultural land by land use type 2004-2020 246
Figure 78: Europe and the European Union: Development of the number of organic producers 2000-2020 250
Figure 79: Europe: Distribution of organic producers and processors by country 2020 250
Figure 80: Europe: Number of organic producers by country 2020 251
Figure 81: Europe: Distribution of retail sales by country and by single market worldwide 2020 252
Figure 82: Europe: Retail sales by country 2020 253
Figure 83: Growth of organic retail sales in Europe and the European Union, 2000-2020 254
Figure 84: Europe: The countries with the highest organic market growth 2020 255
Figure 85: Europe: The countries with the highest per capita consumption 2020 256
Figure 86: Europe: Growth of the per capita consumption 2010-2020 256
Figure 87: Europe: The countries with the highest shares of the total retail sales 2020 257
Figure 88: Europe: Marketing channels for organic products in selected countries 2020 260
Figure 89: Europe: Growth of marketing channels for organic products 2018-2020 in selected countries 260
Figure 90: EU organic imports: Growth 2018 to 2020 (EU27) 261
Figure 91: Latin America and Caribbean: The ten countries with the largest areas of organic agricultural land 2020 278
Figure 92: Latin America and Caribbean: The ten countries with the highest organic share of total agricultural land 2020 278
Figure 93: Latin America and Caribbean: Development of organic agricultural land 2000-2020 279
Figure 94: Latin America and Caribbean: Use of agricultural organic land 2020 279
Figure 95: North America: Organic agricultural land in Canada and the United States 2020 294
Figure 96: North America: Organic share of total agricultural land in Canada and the United States 2020 294
Figure 97: North America: Development of organic agricultural land 2000-2020 295
Figure 98: North America: Land use in organic agriculture 2020 295
Figure 99: Australia: Distribution of organic producers 299
Figure 100: Australia: Distribution of organic farmland 299
Figure 101: Oceania: Organic agricultural land by country 2020 309
Figure 102: Oceania: Organic share of total agricultural land by country 2020 309
Figure 103: Oceania: Development of organic agricultural land 2000-2020 310
Figure 104: Oceania: Use of agricultural organic land 2020 310

Maps

Map 1: Organic agricultural land in 2020 31
Map 2: Organic agricultural land in the countries of Africa 2020 181
Map 3: Organic agricultural land in the countries of Asia 2020 201
Map 4: Organic agricultural land in the countries of Europe 2020 223
Map 5: Organic agricultural land in the countries of Latin America and the Caribbean 2020 271
Map 6: Organic agricultural land in Canada and the United States 2020 283
Map 7: Organic agricultural land in the countries of Oceania 2020 297

Infographics

Infographic 1: Organic agriculture worldwide - key indicators 2020 30
Infographic 2: Organic farmland 2020 36
Infographic 3: Organic producers 2020 56
Infographic 4: Organic retail sales 2020 63
Infographic 5: Organic Agriculture in Europe 2020 224

Glossary

€/person: Per capita consumption in euros
AfrONet: African Organic Network
AMI: Agrarmarkt-Informationsgesellschaft - Agricultural Market Information Company, Germany
AOC: African Organic Conference
AU/AUC: African Union /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
EU27: Member countries of the European Union from 2020 onward
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
Horizon Europe: Research and Innovation Programme of the European Union, running from 2021
HS codes: Harmonized System Codes
ISOFAR: International Society of Organic Agriculture Research, Germany
IFOAM – Organics International: Formerly International Federation of Organic Agriculture Movements (IFOAM)
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

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 profound 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, also 2021 was a special year, as consumer demand for organic foods continued to increase substantially during the pandemic. Evidence shows that retail sales have risen again in the double digits in many countries.

This report, which looks at the consolidated data from 2020, shows that once again, increasing demand for organic products stimulated growth in the organic sector, with organic food sales reaching the 120 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 almost 75 million hectares, representing 1.6 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) aims to support decision-makers in governmental administrations, development agencies, NGOs, and other actors of the international organic industry.

Dr. Monica Rubiolo
Head of the Division for Trade Promotion
Swiss State Secretariat for Economic Affairs (SECO)
Bern, Switzerland

Foreword from FiBL and IFOAM – Organics International

With the 23rd edition, FiBL and IFOAM – Organics International proudly present a new edition of "The World of Organic Agriculture."

Data collection 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 serves as an important tool for stakeholders, policymakers, authorities, the industry, as well as 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 and the European Union's Farm to Fork Strategy.

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 and therewith its contribution to transforming food systems as a whole. Overall, "The World of Organic Agriculture" shows the potential of organic farming to contribute to a sustainable future!

We are grateful to the Swiss State Secretariat for Economic Affairs (SECO), 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 2022

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 23rd edition of "The World of Organic Agriculture", we present the latest available data on organic agriculture worldwide.

Again, many experts have provided valuable data. We are very grateful to all those who supplied data and information from all over the world and our supporters: the Swiss State Secretariat for Economic Affairs, the Coop Sustainability Fund, Nürnberg Messe and IFOAM – Organics International!

Knowledgeable authors once again contributed articles about their regions, countries, or fields of expertise, including the global market report, policy support, public standards and legislation, Participatory Guarantee Systems, organic cotton, the European Union's organic import data as well as the statistics of Demeter International.

Like for the 2021 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. Furthermore, for this edition, we developed the Power Bi graphics further, and most of the figures in this book are now based on Power BI, allowing fast updates in the future. In addition, you can explore our interactive Power BI graphics and database at https://statistics.fibl.org.

Finally, we wish to announce that the Chinese edition of "The World of Organic Agriculture" will be published for the 11th 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 Schlatter

Research Institute of Organic Agriculture FiBL, Frick, Switzerland

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Organic Agriculture: Key Indicators and Top Countries

Indicator	World	Top countries
Countries with organic activities[1]	2020: 190 countries	
Organic agricultural land	2020: 74.9 million hectares (1999: 11 million hectares)	Australia (35.7 million hectares) Argentina (4.5 million hectares) Uruguay (2.7 million hectares)
Organic share of total agricultural land	2020: 1.6 %	Liechtenstein (41.6 %) Austria (26.5 %) Estonia (22.4 %)
Increase of organic agricultural land 2019/2020	3 million hectares (ha); +4.1 %	Argentina: 781´000 ha (+21 %), Uruguay: 589´000 ha (+28 %) India: 359´000 ha (+16%)
Wild collection and further non-agricultural areas	2020: 28.5 million hectares (ha) (1999: 4.1 million hectares)	Finland (5.5 million ha) Namibia (2.6 million ha) Zambia (2.5 million ha)
Producers	2020: 3.4 million producers (1999: 200'000 producers)	India (1'599'010) Ethiopia (219'566) Tanzania (148'607)
Organic market[2]	2020: 120.6 billion euros (2000: 15.1 billion euros)	US (49.5 billion euros) Germany (15.0 billion euros) France (12.7 billion euros)
Per capita consumption	2020: 15.8 euros	Switzerland (418 euros) Denmark (384 euros) Luxembourg (285 euros)
Number of countries/ territories with organic regulations	2020: 76 (fully implemented)	
Number of affiliates of IFOAM – Organics International	2020: 714 affiliates	Germany: 79 affiliates China: 46 affiliates USA: 41 affiliates India: 40 affiliates

Source: FiBL survey 2022, 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 129 billion US dollars in 2020 (page 137). One euro corresponded to 1.1422 US dollars in 2020 according to the European Central Bank.

The World of Organic Agriculture 2022: Summary

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The latest available data on organic agriculture worldwide show that 2020 was another good year for global organic agriculture. According to the latest FiBL survey on organic agriculture worldwide, organic farmland and organic retail sales continued to grow and reached another all-time high, as shown by the data from 190 countries (data as of the end of 2020).

Statistics on organic area and operators

More than 74.9 million hectares of organic farmland

In 2020, over 74.9 million hectares of organic agricultural land, including in-conversion areas, were recorded. Regions with the largest organic agricultural land areas are Oceania (35.9 million hectares – almost half the world's organic agricultural land) and Europe (17.1 million hectares, 23 percent). Latin America had 9.9 million hectares (13.3 percent), followed by Asia (6.1 million hectares, 8.2 percent), Northern America (3.7 million hectares, 5.0 percent) and Africa (2.1 million hectares, 2.8 percent).

Australia has the largest area

Countries with the most organic agricultural land were Australia (35.7 million hectares), Argentina (4.5 million hectares) and Uruguay (2.7 million hectares).

Globally, 1.6 percent of the farmland is organic

In 2020, 1.6 percent of the world's agricultural land was organic. The highest organic shares of the total agricultural land, by region, were in Oceania (9.7 percent) and in Europe (3.4 percent; European Union: 9.2 percent).

Liechtenstein had the highest organic share with 41.6 percent

Some countries reach far higher shares than the global share: Liechtenstein (41.6 percent) and Austria (26.5 percent) had the highest organic shares. In 18 countries, 10 percent or more of the agricultural land was organic.

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Growth in organic farmland – Increase of 3 million hectares (4.1 percent)

Organic farmland increased by 3.0 million hectares (4.1 percent) in 2020. Many countries reported a significant increase; Chile, for instance, showed a 650 percent increase, or over 0.135 million hectares more (mainly due to an increase in organic grazing areas), and Papua New Guinea reported 322 percent more organic farmland (over 72'000 hectares). In absolute terms, the biggest increases were in Argentina, Uruguay and India: in Argentina, organic farmland increased by 781´000 hectares (+21.3 percent), in Uruguay by more than 589´000 hectares (+27.9 percent) and in India by almost 359´000 hectares (+15.6 percent).

Increase of organic farmland in all regions

In 2020, organic agricultural land increased in all continents (Table 6). The highest absolute growth was in Latin America (+19.9 percent, +1.7 million hectares), followed by Europe (+3.7 percent, +0.60 million hectares) and Asia (+7.6 percent, +0.43 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 51 million hectares), which increased by 4 percent in 2020.

With more than 13.1 million hectares, **arable land constituted 18 percent of organic** agricultural land. An increase of 1.0 percent since 2019 was reported. Most of this category of land was used for cereals, including rice, followed by green fodder from arable land, oilseeds, dry pulses and textile crops.

Permanent crops accounted for seven percent of the organic agricultural land, amounting to over 5.2 million hectares. Compared to the previous survey, an increase of more than 712´000 hectares, or 15.7 percent, was reported. The most important crops were olives, nuts, coffee, grapes and cocoa (see page 71).

Further organic areas

Apart from land dedicated to organic agriculture, there are further areas of organic land dedicated to other activities. The largest parts of these are wild collection areas and beekeeping areas. Further non-agricultural areas include aquaculture, forests, and grazing areas on non-agricultural land. These areas totalled 30 million hectares, and all the organic areas together summed up to 104.9 million hectares.

Organic producers on the rise – 3.4 million producers in 2020

There were at least 3.4 million organic producers in 2020.[1] Fifty-six percent of the world's organic producers are in Asia, followed by Africa (24 percent), Europe (12 percent) and Latin America (8 percent). The countries with the most producers are India (1'599'010), Ethiopia (219'566) and Tanzania (148'607) (page 59). There has been an increase in the number of producers of almost 239'000, or 7.6 percent, compared to 2019. For more information, see page 57.

Organic cotton

Like in past years, data on **organic cotton area and production** were provided by the Textile Exchange. The year 2020 was a record-breaking season with the biggest-ever harvest of organic cotton. This follows three years of strong growth: 31 percent in 2018/19. Organic cotton accounted for almost one percent of global cotton production in 2019/20, up from 0.5 percent in 2016/17 (see the article by the Textile Exchange on page 128).

Demeter statistics

In February 2020, Demeter-International and the International Biodynamic Association (IBDA) joined forces to form the Biodynamic Federation Demeter International**.** This new international umbrella organisation unites all Biodynamic and Demeter organisations worldwide. There are more than 7'000 Demeter farmers with almost 227'000 hectares in 62 countries (2021). For more information, see the article by Simpfendörfer and Fischer, page 133).

Global market and EU organic imports

Global market reached more than 120 billion euros

Organic food and drink sales reached more than 120 billion euros, according to FiBL (page 64)[2,3]in 2020. In 2020, the countries with the largest organic markets were the United States (49.5 billion euros), Germany (15.0 billion euros) and France (12.7 billion euros). The **largest single market was the United States** (41 percent of the global market), followed by the European Union (44.8 billion euros, 37 percent) and China (10.2 billion euros, 8.5 percent). Switzerland had the highest per-capita consumption in 2020, with 418 euros. The highest organic market shares were reached in Denmark (13.0 percent), Austria (11.3 percent) and Switzerland (10.8 percent) (see the chapter on the FiBL survey on the global market, page 64).

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[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. 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 129 billion U.S. dollars in 2020.

[3] One euro corresponded to 1.1422 U.S. dollars in 2020 according to the European Central Bank.

Effect of the pandemic on the global organic market

The COVID-19 pandemic continues to change how people live and eat as it continues into its third year, writes Sahota (page 140). Health and wellness issues concern consumers focusing on disease avoidance and building personal immunity. Demand for organic foods has surged since the pandemic began in spring 2020. Healthy growth is expected to continue in the coming years as consumers associate organic foods with good health, nutrition and wellness. However, there are many challenges ahead. Supply chain issues are expected to continue, whilst competition will come from sustainability standards and eco-labelled products. There are also concerns about adequate supply and regulations. For more insight into the global organic market, see the chapter by Sahota on page 140.

EU organic imports

While the growth of the EU organic agri-food products market continued, imports of organic agri-food products decreased slightly between 2019 and 2020. In 2020, 2.79 million metric tons (MT) of organic agri-food products were imported, representing a 1.9 percent decrease compared to the 2.85 million MT imported in 2019. A detailed look at the product categories shows that increased imports of organic tropical fruit and rice were outweighed by lower imports of other cereals, oilcake and sugar. The ranking of the main trading partners also changed, with China and Ukraine losing their top spots to Ecuador and Dominican Republic. The main importing EU Member States in 2020 were the Netherlands, Germany and Belgium. For more information, see the summary of the European Commission's market brief on organic imports into the European Union in 2020 (page 146).

Organic regulations

Regarding regulations, according to the latest data collected by IFOAM - Organics International, in 2021, 76 countries have fully implemented regulations on organic agriculture. Twenty countries have organic regulations that are not fully implemented, and 13 are drafting legislation. Countries going through significant revisions include the European Union and New Zealand. Some Latin American countries are also proposing amendments to their organic regulations. Revisions of regulations occurred in the European Union, New Zealand and Peru, and some equivalence agreements were revised. (See article by Hysa et al. on page 158).

Policies for organic farming

Many countries are setting up policies fostering agroecology and organic agriculture. In Hysa et al.'s article (page 158), examples from countries all over the world are shown, such as Burkina Faso, Madagascar, Togo and Uganda in Africa; Bhutan, India, Nepal, Sri Lanka and The Philippines in Asia; Nicaragua and Peru in Latin America.

Participatory Guarantee Systems in 2021

IFOAM - Organics International is the only organisation collecting data about Participatory Guarantee Systems (PGS) on a global level. During 2020 and 2021, many PGS initiatives were affected by the measures restricting contact and physical

interaction. These measures were adopted around the globe due to the COVID-19 pandemic. Regular meetings and peer reviews could not be carried out as planned – at least not for all their members. In 2021, 242 PGS initiatives were active in 78 countries, with at least 1′244′239 producers involved and 1′205′050 producers certified. These producers are estimated to manage 915′997 hectares of land. The overall increasing trend observed in past years was maintained in 2021 in all regions except Europe and North America, where the figures remained stable, and Oceania, which reported significant changes from previous years. More information, including PGS developments in the regions, is available in the article from Anselmi and Moura e Castro (page 170).

Agroecology and Organic Agriculture at the UN Food Systems Summit 2021

In October 2019, the Secretary-General of the United Nations (UN) announced a Food Systems Summit (UNFSS) in 2021 with the aim of maximising the benefits of a food systems approach across the entire 2030 Agenda for Sustainable Development, meeting the challenges of climate change, making food systems inclusive and supporting sustainable peace. This announcement marked the start of a global policy and consultative process, culminating in a presummit in July and the summit in September 2021. According to Figeczky et al. (page 178), the most tangible result of the efforts to mainstream agroecology in the UNFSS is probably the creation of a Coalition for the Transformation of Food Systems through Agroecology and Regenerative Agriculture with a mandate to ensure that agroecology and organic agriculture are seen as progressive and pioneering within the UNFSS and in any subsequent process.

Organic in the Continents

Africa

There were more than **2 million hectares of certified organic agricultural land in Africa** in 2020. Africa reported 149′000 hectares more than in 2019, a 7.7 percent increase, and nearly 834′000 producers. Tunisia was the country with the largest organic area (more than 290′000 hectares in 2020), and Ethiopia had the largest number of organic producers (almost 220′000). The country with the highest percentage of land devoted to organic farming in the region was the island state of São Tomé and Príncipe, with 20.7 percent of its agricultural area dedicated to organic crops. The majority of certified organic products in Africa are destined for export markets. Key crops are nuts, olives, coffee, cocoa, oilseeds and cotton (see page 192). Five countries in Africa have legislation on organic agriculture, and five countries are drafting legislation. Six countries have a national standard but lack legislation on the definition of organic farming (East African Organic Product Standard) (See article by Hysa et al. on page 158).

Africa saw many important developments in 2021. The Ecological Organic Agriculture Initiative (EOA-I) continued to reach out to smallholder farmers. About 1.76 million of them were provided with information and communication materials to enhance their knowledge on adopting organic farming practices. The Knowledge Centre for Organic Agriculture in Africa (KCOA) provided support for organic agriculture in all parts of

Africa through knowledge management, dissemination and capacity building and market systems development. Organic certification in Africa has gained leverage through a Memorandum of Understanding between the EOA-I Continental Secretariat and the African Organization for Standardization. This memorandum aimed at developing a common continental standard. Preparations for the 5th African Organic Conference have started. This conference will take place in 2022 in Kigali, Rwanda, and is organised by the organic movement in close collaboration with Afronet, the African Organic Network. For more updates about Africa, see the contribution by Amudavi et al. on page 182.

Asia

The total area dedicated to **organic agriculture in Asia was more than 6.1 million hectares in 2020**. There were nearly two million producers, most of whom were in India. The leading countries by area were India (2.7 million hectares) and China (over 2.4 million hectares). Timor-Leste had the highest proportion of organic agricultural land (8.5 percent). (For detailed statistics, see page 192). Twenty countries in the region have legislation on organic agriculture, and six countries are drafting legislation (See article by Hysa et al. on page 158).

In Asia, the organic sector continued to develop rapidly. Partly due to COVID-19, consumer awareness of safe, local, and organic food increased, with many countries reporting increasing sales for organic products. Many countries in Asia formulated policies and strengthened existing laws to further organic agriculture's development. While COVID-19 positively affected the market in most countries, inspection bodies were negatively affected, having to carry out online inspections and postpone the validity of certificates under the pandemic. For details, see the contribution by Hossein et al. on page 202. IFOAM - Organics Asia continued being very active. The Asian Organic Youth Forum organised the People's Food Summit (for the Eastern and Southeast Asian region) on October 16, 2021: a 24-hour global event initiated by Regeneration International and its partners. The 7th Summit of the Asian Local Governments for Organic Agriculture (ALGOA) was held as a hybrid event in October 2021 with participants from over 38 countries and areas. Despite significant challenges due to the pandemic, the 4th Organic Asia Congress was virtually held in Jakarta, Indonesia, in November under the theme "Asia Go Organic for a Healthier Planet!". More information can be found in the chapter by Hossain et al., page 202.

Europe

As of the end of 2020, **17.1 million hectares of agricultural land in Europe** (European Union: 14.9 million hectares) were managed organically by almost 420'000 producers (European Union: almost 350'000). In Europe, 3.4 percent of the agricultural area was organic (European Union: 9.2 percent). Organic farmland has increased by over 0.7 million hectares compared to 2019. The countries with the largest organic agricultural areas were France (2.5 million hectares), Spain (2.4 million hectares) and Italy (2.1 million hectares). In 15 countries, at least 10 percent of the farmland was organic: Liechtenstein had the lead (41.6 percent), followed by Austria (26.5 percent) and Estonia

(22.4 percent). Retail sales of organic products totalled 52 billion euros in 2020 (European Union: 44.8 billion euros), an increase of 15 percent since 2019. The largest market for organic products in 2020 was Germany, with retail sales of 15.0 billion euros, followed by France (12.7 billion euros) and Italy (3.9 billion euros) (See the article by Trávníček et al., page 235). In Europe, 46 countries have legislation on organic agriculture. (See article by Hysa et al. on page 158).

Like 2020, the year 2021, with the continuing COVID-19 crisis, was again a special year for the European organic sector. The consolidated data for 2020 show particularly strong retail sales growth, which were in the double digits in several countries. The new European Union organic regulation was initially set to apply from 01 January 2021, but due to many reasons, including the COVID-19 pandemic, its application was postponed by one year to January 2022. Changes from the previous regulations concern production and food processing, control and certification, and international trade and imports. The new regulations on the European Union's Common Agricultural Policy (CAP) were adopted in November 2021. For IFOAM Organics Europe, it is essential that the implementation of the CAP fully contributes to the European Union's Green Deal, which includes the "Farm to Fork Strategy" and the goal of reaching an organic area share of 25 percent by 2030 (see contribution by Busacca et al. on page 225).

Latin America and the Caribbean

In Latin America, **over 270'000 producers managed over 9.9 million hectares of agricultural land organically in 2020**. This constituted 13.3 percent of the world's organic land and 1.4 percent of the region's agricultural land. The leading countries were Argentina (4.4 million hectares), Uruguay (2.7 million hectares) and Brazil (1.3 million hectares). The highest organic shares of total agricultural land were in Uruguay (19.6 percent), French Guiana (11.3 percent) and the Dominican Republic (4.8 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 such legislation (Hysa et al. on page 158). Brazil has the largest market for organic products in Latin America.

Latin America, especially Peru, was badly hit by the pandemic. A reflection on the effects of the pandemic shows the need for governments, the private sector, producer organisations and community institutions to take a long-term view. It also reveals the necessity of enhancing these groups' capacities to better respond to multiple threats and systemic risks, to make decisions and to provide services to build inclusive value chains that create employment. In Peru, major developments included the GMO moratorium and the launch of the guidelines for the second agrarian reform as a government policy aimed at generating added value in agriculture, productive transformation of the countryside, and development of irrigation infrastructure and technological innovation. For more information, see the chapter by Flores on page 272.

Northern America

In Northern America, over **3.7 million hectares of farmland were managed organically in 2020**. Of these, 2.3 million were in the United States and 1.4 million in Canada, representing 0.8 percent of the total agricultural area in the region (see page 284).

United States

US organic food sales soared to a new high in 2020, jumping to 56.5 billion US dollars (49.5 billion euros). With the pandemic ongoing in 2021, many consumers have continued preparing more meals at home, and some consumers were more willing to spend greater amounts on healthier ingredients and increase organic food purchases.

With the continuation of the pandemic, sales growth was limited by supply chain challenges, affecting producers, distributors, retailers and brands. Also, packaging was in short supply, as were workers and drivers transporting products. In early 2021, President Biden and Vice President Harris were sworn into office. The Organic Trade Association (OTA) released a memo to the transition team at USDA and the White House, outlining key priorities and immediate actions the new administration should take to support organic: For more information about the US developments, see the contribution by Haumann on page 284.

Canada

The Canadian organic sector experienced disruptions in 2020 as the growing season's beginning collided with the national lockdown, causing global disruptions. Despite the obstacles, organic acreage increased by 19 percent to more than 3.5 million acres or almost 1.5 million hectares. Organic food and beverage sales in 2020 topped 6.5 billion Canadian dollars (4.3 billion euros), about 33 percent higher than in 2017. Canada continues to be a net importer of organics globally, but exports have stagnated in recent years, with 2020 data showing organic exports at more than 600 million Canadian dollars. Organic equivalency arrangements continue to provide market access for importers and exporters. In 2020, Canada signed new equivalency arrangements with Taiwan and the United Kingdom, expanded the scope of the Japan arrangement, and continued discussions with Mexico and South Korea. More updates about Canada are available from Loftsgard on page 289.

Oceania

This region includes Australia, New Zealand and the Pacific Islands states. Altogether, there were over 16'000 producers on 35.9 million hectares, constituting 9.7 percent of the region's agricultural land and half the world's organic land. **More than 99 percent of the organic land in the region is in Australia** (35.7 million hectares, mostly extensive grazing land), followed by New Zealand (over 79'000 hectares) and Papua New Guinea (over 72'000 hectares). The highest organic shares of all national agricultural land were in Samoa (14.5 percent), followed by Australia (9.9 percent), Papua New Guinea (6.1 percent), Fiji (4.5 percent), French Polynesia (3.4 percent) and Tonga (3.2 percent). Four countries in Oceania have legislation on organic agriculture, and twelve countries have

a national standard but no organic legislation. For statistics about organic in Oceania, see page 308.

Australia

Amid the pandemic's global trade impacts, Australian organic exporters reached 62 international markets during 2020. Despite current regulatory barriers, economic fluctuations and changing climatic conditions, the Australian organic market delivers 7.9 percent market growth per annum; retail sales were at 2'354million Canadian dollars (1'422 million euros) in 2020. Consumers' spending habits changed dramatically, and larger businesses saw strong growth in their segments on the order of 10 to 20 percent per year. Details about developments in Australia can be found in the chapter by Ford on page 298.

Pacific Islands

In the Pacific Islands, COVID-19, including supply chain disruptions, restrictions on mobility and border closures, has substantially impacted organic farmers, supply chains and certification across the Pacific Islands. Audit and inspections have been severely impacted, as few countries have nationally based inspectors; they fly in from neighbouring regions. While some licensees have been able to undertake virtual audits, it has meant that no new farms or licensees have been able to take up certification. Inter-island supply chain logistics have been significantly affected during lockdown periods, and some farmers were unable to access inputs. Domestic sales have dropped dramatically due to the lack of tourists, while regional and international sales have diminished due to border closures. However, governments continue to create a supportive policy environment, and the demand for certification continues. For more information about recent developments in the Pacific Islands, see the chapter by Mapusua on page 304.

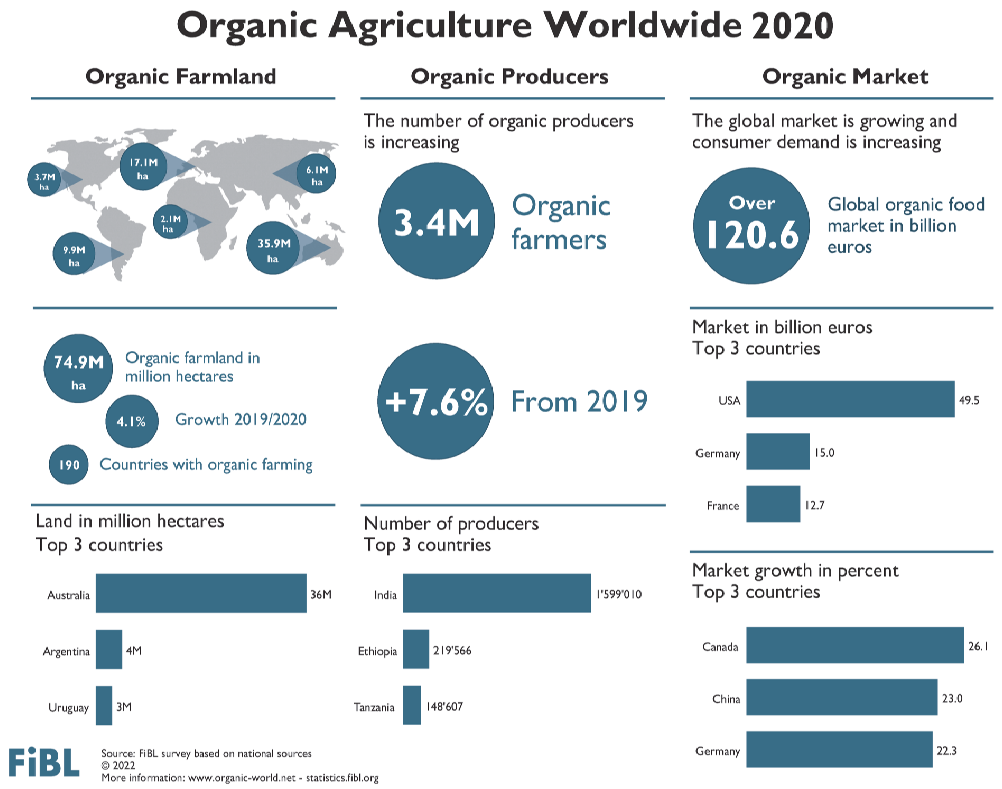
Retrospective and Outlook

The year 2021 saw several important events for the organic sector: the Organic World Congress, the United Nations' Food Systems Summit and the Climate Change Conference in Glasgow. In 2022, IFOAM - Organics International will build on these achievements on both a global and regional level, supporting policy decision-makers as well as farmer groups and media multipliers to do the right thing. This important work will herald the Year of Organics, as 2022 will see IFOAM - Organics International turn 50, the International Organic Accreditation Services (IOAS) 25, IFOAM Organics Europe 20, and IFOAM Organics Asia 10 years old. "We look forward to celebrating these joyful events with you and the whole organic movement and will use the opportunity to invite even more partners to join us. Together, we are part of the solution!" writes Louise Luttikholt, executive director of IFOAM - Organics International (page 314).

Next FiBL Survey on Organic Agriculture Worldwide

The next global organic survey will start in mid-2022; data will be published in February 2023 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 2023 edition of "The World of Organic Agriculture". Corrections will also be posted on www.organic-world.net.

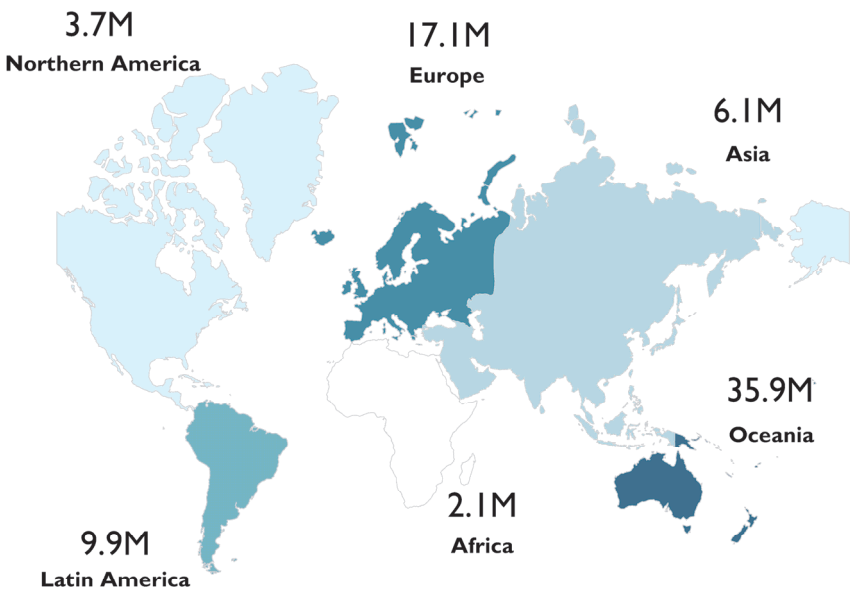
Contact: helga.willer@fibl.org



Infographic 1: Organic agriculture worldwide - key indicators 2020

Source: FiBL survey 2022

Organic Agriculture Worldwide: Current Statistics



Organic agricultural land in hectares (M=millions)

Map 1: Organic agricultural land in 2020

Source: FiBL survey 2022

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

BERNHARD SCHLATTER,[1] JAN TRÁVNÍČEK,[2] CLAUDIA MEIER AND HELGA WILLER[3]

Introduction

The 23rd 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 Sustainability Fund of Coop Switzerland,[4] and NürnbergMesse.[5]

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, Mayacert, 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 America 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 were provided by the Pacific Organic and Ethical Trade 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

Data from 190 countries/territories were available, including area, producers and other operators, production, retail sales, international trade, livestock and further indicators. Updated data was not available for all countries/territories. For the countries/territories

[1] Bernhard Schlatter, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[2] Jan Trávníček, Czech Organics, Staré Město, Czech Republic, www.czechorganics.com
[3] Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[4] Since 2019, the data collection on organic agriculture has been supported by the Sustainability Fund of Coop Switzerland.
[5] 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.

for which FiBL compiles the data among (often several) certifiers, not all of them provided updated data in all cases. 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 2020

Region	Countries/territories* with data on organic agriculture	Total per region[1]	Share that provided data (%)
Africa	48	60	80
Asia	43	50	86
Europe	48	52	92
Latin America and the Caribbean	36	52	69
Northern America	3	5	60
Oceania	12	29	41
World	190	249	76

Source: FiBL survey 2022
**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/.

Challenges with the 2021and 2022 survey

With the 2021 and 2022 surveys, 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 some of this data

[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.

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, which in most cases is 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 as the data providers did not make the distinction between third-party and PGS certification. (For more information about PGS, see the article by Anselmi and Moura e Castro et al. on page 170.

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 322).

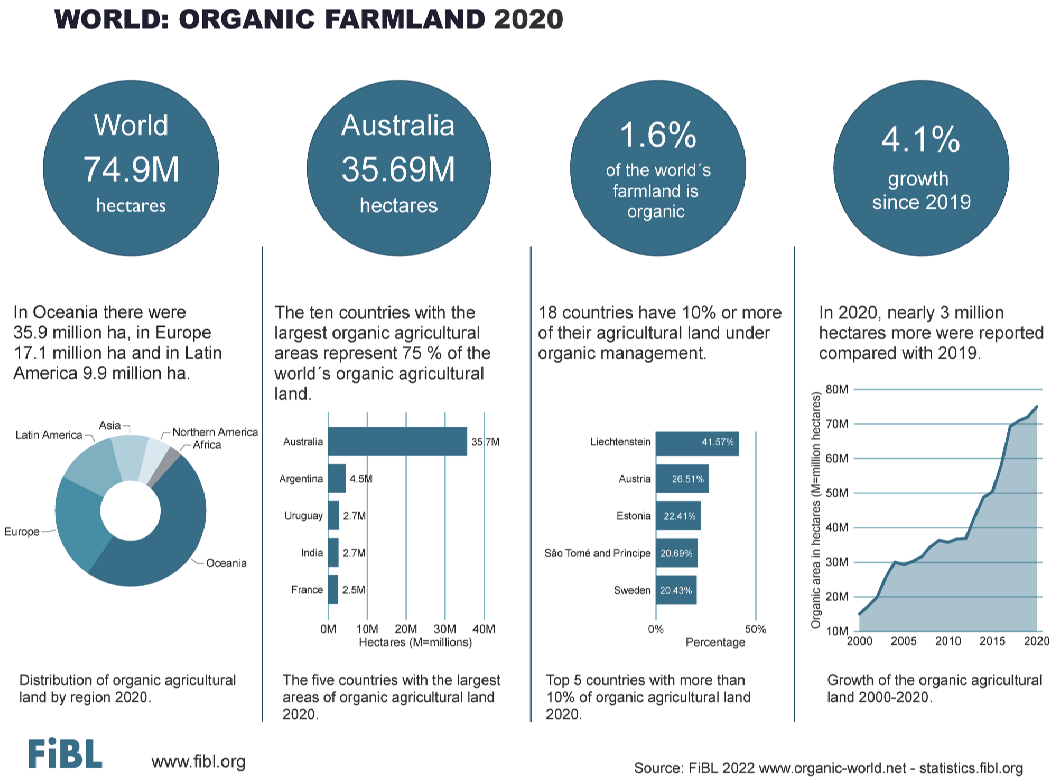
Direct year-to-year comparison: A direct year-to-year comparison is not possible for all data, as the data sources may change, data may not be provided on an annual basis, data may have been revised or corrected due to improved data access, or exchange rates might change from year to year.

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 2020

Source: FiBL survey 2022

Organic land

Organic agricultural land

In 2020, 74.9 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 17.1 million hectares, Latin America (9.9 million hectares), Asia (6.1 million hectares), Northern America (3.7 million hectares) and Africa (2.2 million hectares).

Oceania has almost half of the global organic agricultural land. Europe, a region that has had a very constant growth of organic land over the years, has almost 23 percent of the world's organic agricultural land, followed by Latin America with 13 percent (Figure 1, page 38).

Australia is the country with the most organic agricultural land (increase by +200 percent in the 2011-2020 decade); it is estimated that 97 percent of the farmland is extensive grazing areas. Argentina is second, followed by Uruguay in third place (Figure 2, page 38). The ten countries with the largest organic agricultural areas have a combined total of 59.1 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 30 million hectares.

Table 2: World: Organic agricultural land (including in-conversion areas) and regions' shares of the global organic agricultural land 2020

Region	Organic agricultural land [hectares]	Regions' shares of the global organic agricultural land
Africa	2'086'859	2.8%
Asia	6'146'235	8.2%
Europe	17'098'134	22.8%
Latin America	9'949'461	13.3%
Northern America	3'744'163	5.0%
Oceania	35'908'876	47.9%
World*	**74'926'006**	**100%**

Source: FiBL survey 2022. 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.

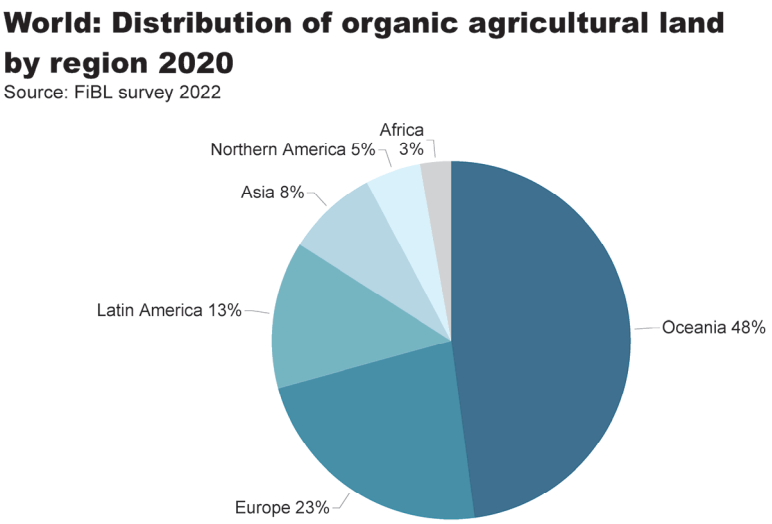


Figure 1: World: Distribution of organic agricultural land by region 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

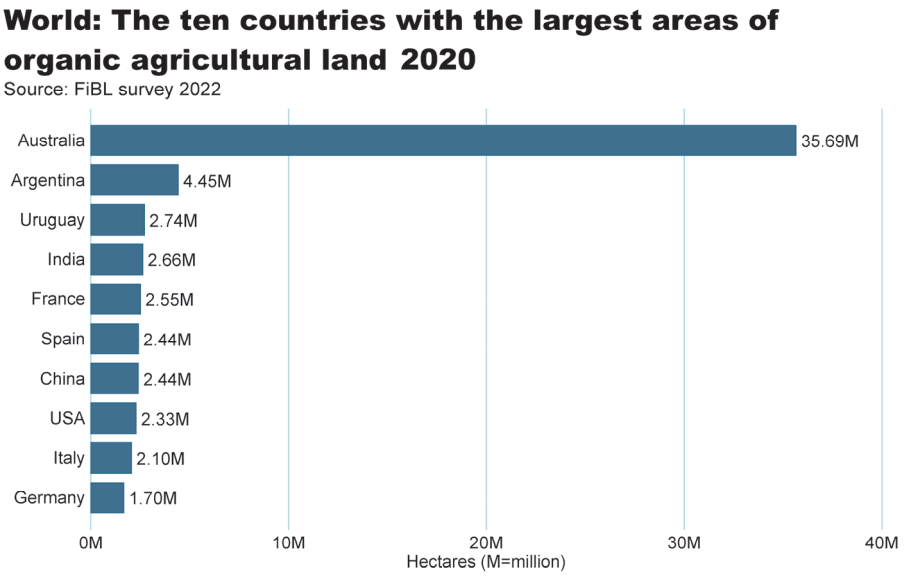


Figure 2: World: The ten countries with the largest areas of organic agricultural land 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Table 3: World: Organic agricultural land (including in-conversion areas) by country/territory 2020 (sorted)

For an alphabetical country list, see page 52.

Country/Territory	Hectares
Australia	35'687'799
Argentina	4'453'639
Uruguay	2'742'368
India	2'657'889
France	2'548'677
Spain	2'437'891
China	2'435'000
United States of America	2'326'551
Italy	2'095'380
Germany	1'702'240
Canada	1'417'612
Brazil	1'319'454
Austria	679'872
Russian Federation	615'188
Sweden	613'964
Czech Republic	539'532
Greece	534'629
Poland	507'637
United Kingdom	473'500
Romania	468'887
Ukraine	462'225
Turkey	382'639
Peru	342'701
Portugal	319'540
Finland	315'112
Hungary	301'430
Denmark	299'998
Tunisia	297'137
Latvia	291'150
Lithuania	235'471
Ethiopia	234'648
Slovakia	222'896
Estonia	220'796
Sierra Leone	219'861
Mexico	215'634
Tanzania, United Republic of	198'226
Philippines	191'770
Bolivia (Plurinational State of)	179'425
Switzerland	177'347
Thailand	160'802
Chile	156'819
Togo	127'782
Kenya	123'744
Democratic Republic of the Congo	118'254
Dominican Republic	117'312
Uganda	116'376
Bulgaria	116'253
Egypt	116'000
Kazakhstan	114'886
Croatia	108'610
Madagascar	103'817
Belgium	99'075
Guatemala	87'028
New Zealand	79'347
Côte d'Ivoire	79'125
Indonesia	75'793
Ghana	74'874
Ireland	73'952
Paraguay	73'428
Sri Lanka	73'393
Papua New Guinea	72'477
Netherlands	71'607
Pakistan	69'850
Honduras	66'179
Burkina Faso	66'175
Viet Nam	63'536
Nigeria	54'995
Slovenia	52'078
Colombia	50'533
Norway	45'312
Ecuador	41'537
Samoa	40'992
South Africa	40'954
Nicaragua	39'076
Benin	38'822
Republic of Korea	38'540
Azerbaijan	38'080
Cambodia	35'879
Timor-Leste	32'311
Falkland Islands (Malvinas)	31'937
Kyrgyzstan	30'259
Moldova	27'624
Saudi Arabia	26'632
Serbia	19'317
Fiji	19'303
Mali	14'675
Mozambique	14'438

Country/Territory	Hectares
Japan	11'992
Iran (Islamic Republic of)	11'916
Tajikistan	11'818
Costa Rica	11'465
Morocco	11'452
Taiwan	10'789
Myanmar	10'143
Guinea-Bissau	9'844
Nepal	9'361
Sao Tome and Principe	9'103
Belarus	6'838
Israel	6'287
Luxembourg	6'118
Panama	5'929
Cyprus	5'918
United Arab Emirates	5'419
Palestine	5'218
Rwanda	5'188
Montenegro	4'823
Iceland	4'709
Bhutan	4'095
Senegal	3'809
Uzbekistan	3'781
North Macedonia	3'727
French Guiana (France)	3'690
Solomon Islands	3'367
Lao People's Democratic Republic	3'266
Haiti	2'907
El Salvador	2'569
Cuba	2'129
Vanuatu	2'052
Réunion (France)	1'901
Lebanon	1'715
Bosnia and Herzegovina	1'692
Kosovo	1'604
Georgia	1'572
French Polynesia	1'562
Liechtenstein	1'490
Venezuela (Bolivarian Republic of)	1'490
Jordan	1'446
Malaysia	1'276
Eswatini	1'156
Tonga	1'119
Zimbabwe	1'043
Comoros	1'004
Albania	887
Guadeloupe (France)	858
New Caledonia	800
Algeria	772
Zambia	691
Martinique (France)	683
Armenia	566
Bangladesh	504
Belize	454
Cameroon	345
Burundi	319
Faroe Islands	251
Mongolia	241
Malawi	232
Channel Islands	180
Afghanistan	98
Mayotte	87
Grenada	84
Malta	67
Iraq	63
Suriname	52
Bahamas	49
Niue	43
Kuwait	33
British Virgin Islands	26
Cook Islands	15
Singapore	15
Jamaica	10
Mauritius	5
Oman	4
Cape Verde	3
Andorra	2
Seychelles	0.01
World*	**74'926'006**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 322
**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 was 1.6 percent in 2020.

The highest organic share of total agricultural land, by region, was in Oceania (9.7 percent), followed by Europe with 3.4 percent and Latin America with 1.4 percent. In the European Union, the organic share of the total agricultural land was 9.2 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 18 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 was Liechtenstein, with 41.6 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, 54 percent of the countries for which data is available had less than one percent of their agricultural land under organic management (Figure 4).

Table 4: World: Organic agricultural land (including in-conversion areas) and organic share of total agricultural land by region 2020

Region	Organic agri. land [ha]	Share of total agri. land
Africa	2'086'859	0.2%
Asia	6'146'235	0.4%
Europe	17'098'134	3.4%
Latin America	9'949'461	1.4%
Northern America	3'744'163	0.8%
Oceania	35'908'876	9.7%
World*	**74'926'006**	**1.6%**

Source: FiBL survey 2022.
** 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

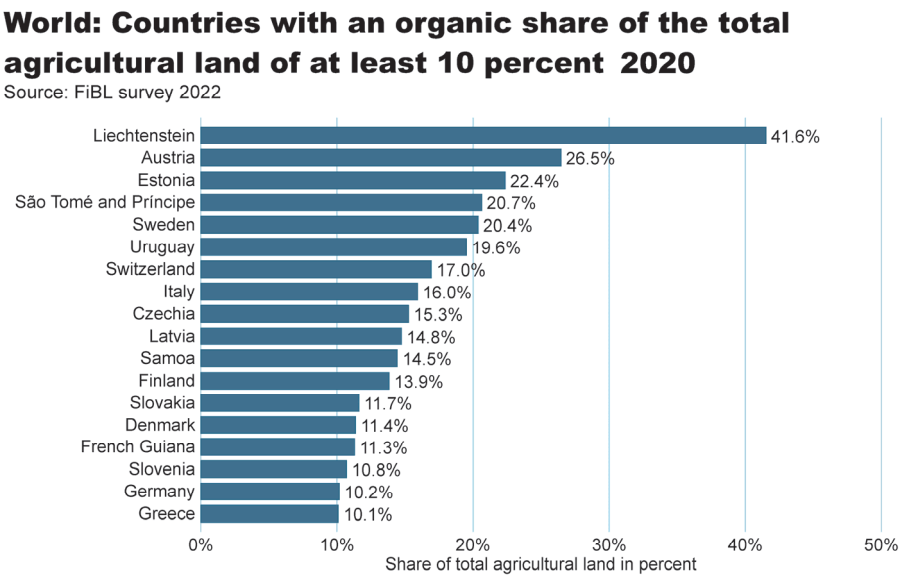


Figure 3: World: Countries with an organic share of the total agricultural land of at least 10 percent 2020

Source: FiBL survey 2022, 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 322

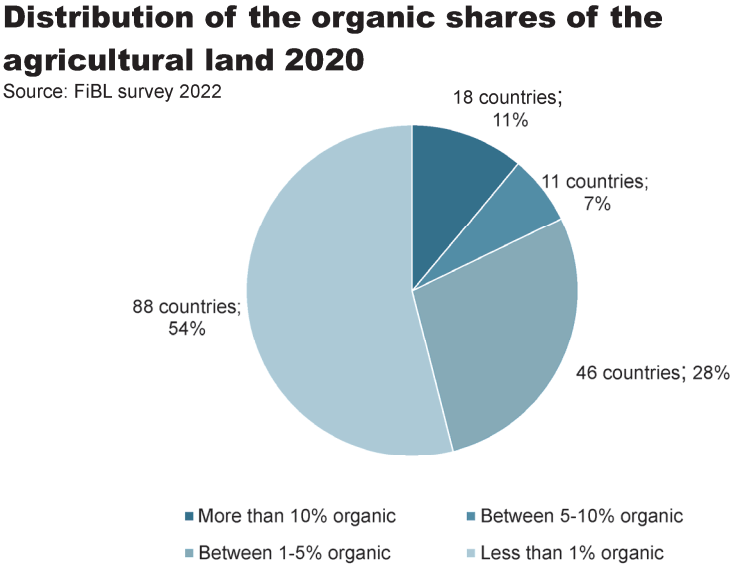


Figure 4: World: Distribution of the organic shares of the agricultural land 2020

Source: FiBL survey 2022, 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 322.

Table 5: World: Organic shares of total agricultural land by country 2020 (sorted)

For an alphabetical country list, see page 317.

Country/Territory	Organic share
Liechtenstein	41.6%
Austria	26.5%
Estonia	22.4%
Sao Tome and Principe	20.7%
Sweden	20.4%
Uruguay	19.6%
Switzerland	17.0%
Italy	16.0%
Czech Republic	15.3%
Latvia	14.8%
Samoa	14.5%
Finland	13.9%
Slovakia	11.7%
Denmark	11.4%
French Guiana (France)	11.3%
Slovenia	10.8%
Germany	10.2%
Greece	10.1%
Spain	10.0%
Australia	9.9%
France	8.8%
Timor-Leste	8.5%
Faroe Islands	8.4%
Portugal	8.1%
Lithuania	8.0%
Belgium	7.2%
Croatia	7.2%
Papua New Guinea	6.1%
Hungary	6.0%
Sierra Leone	5.6%
Dominican Republic	4.8%
Luxembourg	4.6%
Norway	4.6%
Fiji	4.5%
Cyprus	4.4%
Réunion (France)	4.0%
Netherlands	3.9%
Poland	3.5%
Romania	3.5%
French Polynesia	3.4%
Togo	3.3%
Tonga	3.2%
Tunisia	3.0%
Egypt	3.0%
Argentina	3.0%
Solomon Islands	2.9%
Falkland Islands (Malvinas)	2.8%
United Kingdom	2.7%
Sri Lanka	2.6%
Canada	2.4%
Republic of Korea	2.3%
Bulgaria	2.3%
Guatemala	2.3%
Singapore	2.2%
Martinique (France)	2.2%
Honduras	2.0%
Channel Islands	2.0%
Montenegro	1.9%
Guadeloupe (France)	1.7%
Ireland	1.6%
Philippines	1.5%
India	1.5%
Peru	1.5%
United Arab Emirates	1.4%
Taiwan	1.4%
Moldova	1.2%
Guinea-Bissau	1.2%
Palestine	1.1%
Ukraine	1.1%
Vanuatu	1.1%
Grenada	1.1%
Cook Islands	1.0%
Israel	1.0%
Turkey	1.0%
Chile	1.0%
Benin	1.0%
Niue	0.9%
Uganda	0.8%
Bhutan	0.8%
Azerbaijan	0.8%
Nicaragua	0.8%
Comoros	0.8%
Ecuador	0.8%
New Zealand	0.8%
Thailand	0.7%
Cambodia	0.6%
Costa Rica	0.6%
Malta	0.6%
Ethiopia	0.6%
United States of America	0.6%
Brazil	0.6%
Serbia	0.6%
Burkina Faso	0.5%
Viet Nam	0.5%

Country/Territory	Organic share
Ghana	0.5%
Tanzania, United Republic of	0.5%
Bolivia (Plurinational State of)	0.5%
China	0.5%
Kenya	0.4%
Mayotte	0.4%
New Caledonia	0.4%
Kosovo	0.4%
Democratic Republic of the Congo	0.4%
Côte d'Ivoire	0.4%
British Virgin Islands	0.4%
Bahamas	0.3%
Paraguay	0.3%
Iceland	0.3%
North Macedonia	0.3%
Kyrgyzstan	0.3%
Rwanda	0.3%
Russian Federation	0.3%
Japan	0.3%
Belize	0.3%
Panama	0.3%
Lebanon	0.3%
Madagascar	0.3%
Tajikistan	0.2%
Nepal	0.2%
Mexico	0.2%
Pakistan	0.2%
El Salvador	0.2%
Haiti	0.2%
Jordan	0.1%
Lao People's Democratic Republic	0.1%
Indonesia	0.1%
Colombia	0.1%
Eswatini	0.1%
Bosnia and Herzegovina	0.1%
Belarus	0.1%
Nigeria	0.1%
Myanmar	0.1%
Albania	0.1%
Georgia	0.1%
Suriname	0.1%
Kazakhstan	0.1%
Senegal	0.04%
South Africa	0.04%
Morocco	0.04%
Mali	0.04%
Mozambique	0.03%
Cuba	0.03%
Armenia	0.03%
Iran (Islamic Republic of)	0.03%
Kuwait	0.02%
Burundi	0.02%
Saudi Arabia	0.02%
Malaysia	0.01%
Uzbekistan	0.01%
Andorra	0.01%
Venezuela (Bolivarian Republic of)	0.01%
Zimbabwe	0.01%
Mauritius	0.01%
Bangladesh	0.01%
Malawi	0.004%
Cameroon	0.004%
Cape Verde	0.003%
Zambia	0.003%
Jamaica	0.002%
Algeria	0.002%
Iraq	0.001%
Oman	0.0003%
Afghanistan	0.0003%
World	**1.6%**

Source: FiBL survey 2022, 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 322

Growth of the organic agricultural land

Compared with 1999, when 15 million hectares were organic, organic agricultural land has increased five-fold (2020). In 2020, 2.97 million hectares, or 4.1 percent, more were reported compared with 2019. Many countries reported a significant increase, for instance, Argentina (21.3 percent increase; over 0.78 million hectares more), and Uruguay (27.9 percent increase; almost 0.60 million hectares more). In addition, India (15.6 percent increase; almost 0.36 million hectares more) and France (13.7 percent, almost 0.31 million hectares more) reported significant increases (Figure 7).

In 2020, the organic agricultural land increased in all continents (Table 6). The highest absolute growth was in Latin America (+19.9 percent, +1.7 million hectares), followed by Europe (+3.7 percent, +0.60 million hectares) and Asia (+7.6 percent, +0.43 million hectares).

Ninety countries experienced an increase in the area of their organic agricultural land, while a decrease was reported in 60 countries. In 29 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 2019-2020, and 10 years growth

Region	Organic agri. land 2019 [ha]	Organic agri. land 2020 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
Africa	1'937'873	2'086'859	148'986	7.7%	1'017'163	95.1%
Asia	5'713'875	6'146'235	432'360	7.6%	2'460'086	66.7%
Europe	16'494'912	17'098'134	603'222	3.7%	6'549'611	62.1%
Latin America	8'296'331	9'949'461	1'653'129	19.9%	2'983'312	42.8%
Northern America	3'647'623	3'744'163	96'539	2.6%	724'476	24.0%
Oceania	35'873'526	35'908'876	35'350	0.1%	24'525'183	215.4%
World*	**71'957'852**	**74'926'006**	**2'968'154**	**4.1%**	**38'257'102**	**104.3%**

Source: FiBL survey 2022, based on data from government bodies, the private sector, and certifiers. For detailed data sources, see annex, page 322

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

World: Growth of organic agricultural land and organic share 2000 - 2020

Source: FiBL-IFOAM-SOEL surveys 2001-2022

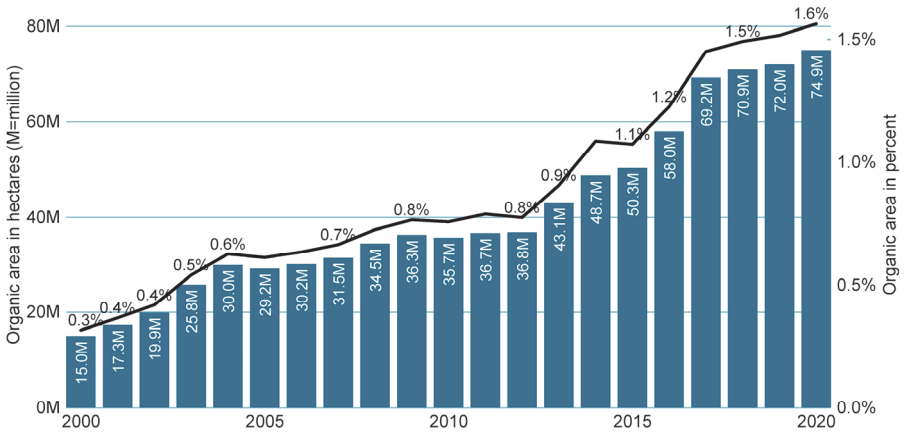


Figure 5: World: Growth of the organic agricultural land and organic share 2000-2020

Source: FiBL-IFOAM-SOEL surveys 2001-2022

World: Growth of the organic agricultural land by continent 2000 - 2020

Source: FiBL-IFOAM surveys 2001-2022

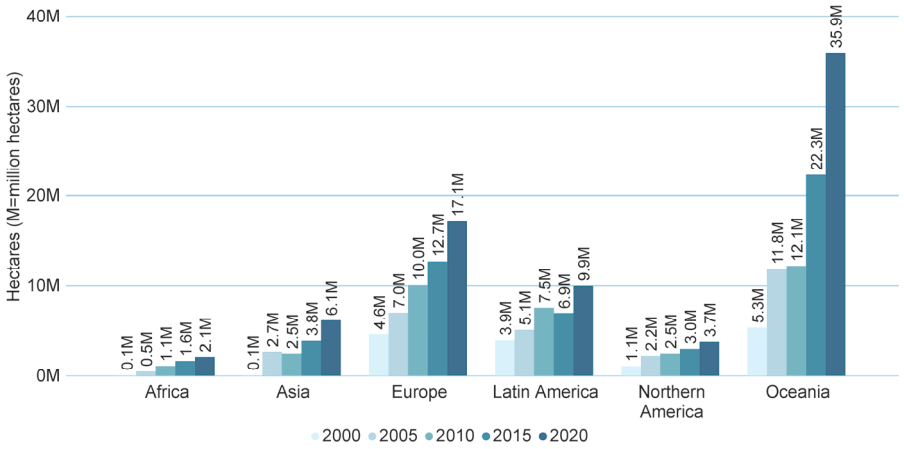


Figure 6: World: Growth of the organic agricultural land by continent 2000 to 2020

Source: FiBL-IFOAM-SOEL surveys 2001-2022

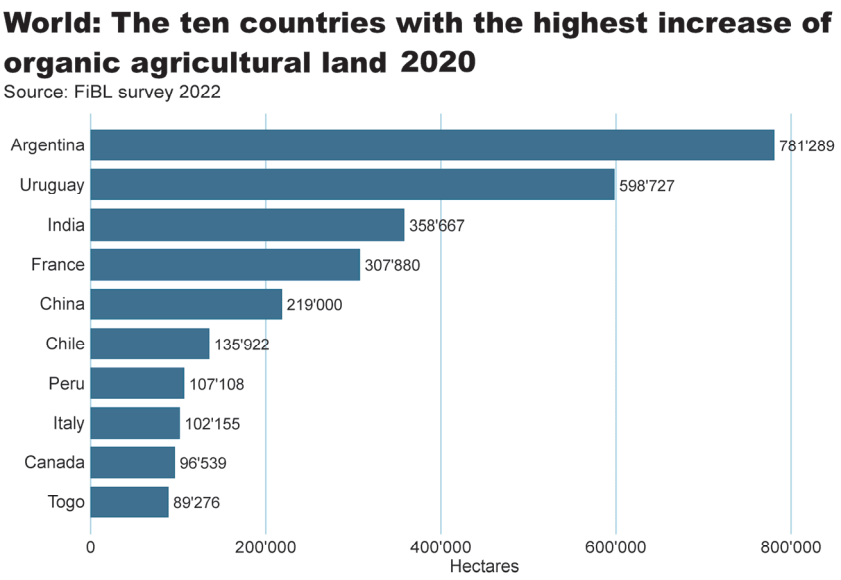


Figure 7: World: The ten countries with the highest increase of organic agricultural land 2020

Source: FiBL survey 2022, based on data from government bodies, the private sector, and certifiers. For detailed data sources, see annex, page 322

Table 7: World: Development of organic agricultural land by country 2019-2020

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 was used (see also page 322). On statistics.fibl.org, data back to 2000 is available.

Country/Territory	Organic agri. land 2019 [ha]	Organic agri. land 2020 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
Afghanistan	786	98	-688	-87.6%	36	59.4%
Albania	653	887	234	35.8%	439	97.9%
Algeria	772	772	0	0.0%	80	11.6%
Andorra	2	2	0	0.0%	-2	-50.0%
Argentina	3'672'350	4'453'639	781'289	21.3%	657'503	17.3%
Armenia	594	566	-29	-4.8%	-184	-24.6%
Australia	35'687'799	35'687'799	0	0.0%	24'488'222	218.7%
Austria	669'921	679'872	9'951	1.5%	117'625	20.9%
Azerbaijan	37'630	38'080	450	1.2%	16'121	73.4%
Bahamas	49	49	0	0.0%	49	N/A
Bangladesh	2'249	504	-1'746	-77.6%	-69	-12.0%
Belarus	1'375	6'838	5'463	397.3%	6'838	N/A
Belgium	93'119	99'075	5'956	6.4%	43'771	79.1%
Belize	77	454	377	490.8%	-33	-6.8%
Benin	15'164	38'822	23'658	156.0%	37'126	2189.0%
Bhutan	6'632	4'095	-2'537	-38.3%	-2'055	-33.4%
Bolivia (Plurinational State of)	144'231	179'425	35'194	24.4%	33'531	23.0%
Bosnia and Herzegovina	1'692	1'692	0	0.0%	1'349	393.5%

Country/Territory	Organic agri. land 2019 [ha]	Organic agri. land 2020 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
Brazil	1'285'126	1'319'454	34'328	2.7%	632'414	92.0%
British Virgin Islands		26	26	N/A	26	N/A
Bulgaria	117'779	116'253	-1'526	-1.3%	91'231	364.6%
Burkina Faso	87'490	66'175	-21'315	-24.4%	46'491	236.2%
Burundi	84	319	235	281.7%	-231	-42.0%
Cambodia	25'757	35'879	10'122	39.3%	27'595	333.1%
Cameroon	204	345	141	69.3%	-504	-59.4%
Canada	1'321'072	1'417'612	96'539	7.3%	576'396	68.5%
Cape Verde	495	3	-493	-99.4%	3	N/A
Chad	1'113		-1'113	-100.0%	0	N/A
Channel Islands	180	180	0	0.0%	-70	-28.0%
Chile	20'897	156'819	135'922	650.4%	127'750	439.5%
China	2'216'000	2'435'000	219'000	9.9%	535'000	28.2%
Colombia	30'447	50'533	20'086	66.0%	16'473	48.4%
Comoros	1'164	1'004	-160	-13.7%	-1'637	-62.0%
Cook Islands	15	15	0	0.0%	-5	-22.6%
Costa Rica	10'952	11'465	513	4.7%	1'895	19.8%
Côte d'Ivoire	66'728	79'125	12'397	18.6%	58'467	283.0%
Croatia	108'127	108'610	483	0.4%	76'574	239.0%
Cuba	2'373	2'129	-245	-10.3%	-80	-3.6%
Cyprus	6'240	5'918	-322	-5.2%	2'343	65.5%
Czech Republic	540'986	539'532	-1'454	-0.3%	79'034	17.2%
Democratic Republic of the Congo	88'727	118'254	29'527	33.3%	77'222	188.2%
Denmark	285'526	299'998	14'472	5.1%	137'825	85.0%
Dominica	240		-240	-100.0%	-240	-100.0%
Dominican Republic	134'375	117'312	-17'063	-12.7%	-69'619	-37.2%
Ecuador	47'836	41'537	-6'299	-13.2%	-8'500	-17.0%
Egypt	116'000	116'000	0	0.0%	33'833	41.2%
El Salvador	1'708	2'569	861	50.4%	-4'168	-61.9%
Estonia	220'737	220'796	59	0.0%	87'017	65.0%
Eswatini	1'406	1'156	-250	-17.8%	1'142	7931.0%
Ethiopia	221'189	234'648	13'459	6.1%	94'173	67.0%
Falkland Islands (Malvinas)	31'937	31'937	0	0.0%	-366'869	-92.0%
Faroe Islands	251	251	0	0.0%	-2	-0.8%
Fiji	22'612	19'303	-3'308	-14.6%	17'297	862.3%
Finland	306'484	315'112	8'628	2.8%	126'923	67.4%
France	2'240'797	2'548'677	307'880	13.7%	1'573'536	161.4%
French Guiana (France)	3'667	3'690	23	0.6%	1'492	67.9%
French Polynesia	1'562	1'562	0	0.0%	1'457	1387.4%
Gambia	68		-68	-100.0%	0	N/A
Georgia	1'452	1'572	120	8.3%	-428	-21.4%
Germany	1'613'785	1'702'240	88'455	5.5%	686'614	67.6%
Ghana	31'199	74'874	43'675	140.0%	54'981	276.4%
Greece	528'752	534'629	5'877	1.1%	321'353	150.7%
Grenada	84	84	0	0.0%	-1	-1.7%
Guadeloupe (France)	492	858	366	74.4%	692	416.9%
Guatemala	88'178	87'028	-1'151	-1.3%	73'648	550.4%
Guinea	1'000		-1'000	-100.0%	0	N/A
Guinea-Bissau	781	9'844	9'062	1159.7%	9'844	N/A
Guyana			0	N/A	-4'249	-100.0%
Haiti	3'333	2'907	-426	-12.8%	1'995	218.7%
Honduras	29'274	66'179	36'905	126.1%	42'352	177.8%
Hungary	303'190	301'430	-1'760	-0.6%	177'028	142.3%
Iceland	5'740	4'709	-1'031	-18.0%	-3'537	-42.9%
India	2'299'222	2'657'889	358'667	15.6%	1'573'623	145.1%
Indonesia	121'535	75'793	-45'743	-37.6%	1'758	2.4%

Country/Territory	Organic agri. land 2019 [ha]	Organic agri. land 2020 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
Iran (Islamic Republic of)	11'916	11'916	0	0.0%	-31'416	-72.5%
Iraq	63	63	0	0.0%	63	N/A
Ireland	73'952	73'952	0	0.0%	19'830	36.6%
Israel	6'307	6'287	-21	-0.3%	-809	-11.4%
Italy	1'993'225	2'095'380	102'155	5.1%	998'491	91.0%
Jamaica	374	10	-364	-97.3%	-532	-98.2%
Japan	11'002	11'992	990	9.0%	2'591	27.6%
Jordan	1'446	1'446	0	0.0%	-1'121	-43.7%
Kazakhstan	229'463	114'886	-114'577	-49.9%	-81'329	-41.4%
Kenya	48'525	123'744	75'219	155.0%	118'775	2390.3%
Kosovo	1'036	1'604	568	54.8%	1'593	14350.5 %
Kuwait	33	33	0	0.0%	33	N/A
Kyrgyzstan	19'054	30'259	11'205	58.8%	15'161	100.4%
Lao People's Democratic Republic	5'905	3'266	-2'638	-44.7%	-2'723	-45.5%
Latvia	289'796	291'150	1'354	0.5%	107'054	58.2%
Lebanon	1'574	1'715	141	8.9%	-1'589	-48.1%
Lesotho			0	N/A	-183	-100.0%
Liberia	2		-2	-100.0%	0	N/A
Liechtenstein	1'470	1'490	20	1.4%	395	36.1%
Lithuania	242'118	235'471	-6'647	-2.7%	83'166	54.6%
Luxembourg	5'814	6'118	304	5.2%	2'398	64.5%
Madagascar	76'530	103'817	27'287	35.7%	73'574	243.3%
Malawi	12'294	232	-12'062	-98.1%	66	39.7%
Malaysia	1'276	1'276	0	0.0%	-305	-19.3%
Mali	11'300	14'675	3'375	29.9%	-114	-0.8%
Malta	55	67	12	21.8%	44	193.6%
Martinique (France)	613	683	70	11.4%	385	129.2%
Mauritius	6	5	-1	-16.0%	-25	-83.5%
Mayotte	87	87	0	0.1%	87	N/A
Mexico	301'891	215'634	-86'257	-28.6%	-151'270	-41.2%
Moldova	26'702	27'624	921	3.5%	5'522	25.0%
Mongolia	61	241	180	293.8%	241	N/A
Montenegro	4'751	4'823	71	1.5%	1'755	57.2%
Morocco	9'917	11'452	1'535	15.5%	-5'578	-32.8%
Mozambique	7'762	14'438	6'676	86.0%	9'970	223.1%
Myanmar	12'948	10'143	-2'806	-21.7%	9'941	4923.7%
Namibia	112		-112	-100.0%	-14'112	-100.0%
Nepal	9'361	9'361	0	0.0%	664	7.6%
Netherlands	68'068	71'607	3'539	5.2%	24'402	51.7%
New Caledonia	800	800	0	0.0%	800	N/A
New Zealand	88'871	79'347	-9'524	-10.7%	-53'974	-40.5%
Nicaragua	42'952	39'076	-3'876	-9.0%	5'455	16.2%
Niger	254		-254	-100.0%	-76	-100.0%
Nigeria	55'047	54'995	-52	-0.1%	45'522	480.5%
Niue	43	43	0	0.0%	-18	-29.2%
North Macedonia	3'711	3'727	16	0.4%	-22'704	-85.9%
Norway	45'312	45'312	0	0.0%	-10'188	-18.4%
Oman	43	4	-38	-89.7%	-34	-88.5%
Pakistan	64'885	69'850	4'965	7.7%	44'926	180.3%
Palestine	5'388	5'218	-170	-3.2%	-1'136	-17.9%
Panama	5'929	5'929	0	0.0%	1'353	29.6%
Papua New Guinea	17'169	72'477	55'308	322.1%	61'140	539.3%
Paraguay	57'566	73'428	15'863	27.6%	22'238	43.4%
Peru	235'592	342'701	107'108	45.5%	156'737	84.3%
Philippines	168'352	191'770	23'418	13.9%	95'453	99.1%

Country/Territory	Organic agri. land 2019 [ha]	Organic agri. land 2020 [ha]	1 year growth [ha]	1 year growth [%]	10 years growth [ha]	10 years growth [%]
Poland	507'637	507'637	0	0.0%	-101'775	-16.7%
Portugal	293'213	319'540	26'327	9.0%	119'389	59.6%
Puerto Rico	14		-14	-100.0%	0	N/A
Republic of Korea	29'711	38'540	8'829	29.7%	19'228	99.6%
Réunion (France)	1'240	1'901	661	53.3%	1'345	241.9%
Romania	395'228	468'887	73'659	18.6%	238'941	103.9%
Russian Federation	641'736	615'188	-26'548	-4.1%	488'341	385.0%
Rwanda	1'265	5'188	3'923	310.2%	1'483	40.0%
Samoa	41'083	40'992	-91	-0.2%	7'477	22.3%
Sao Tome and Principe	10'934	9'103	-1'831	-16.7%	4'637	103.8%
Saudi Arabia	24'517	26'632	2'115	8.6%	8'069	43.5%
Senegal	6'486	3'809	-2'677	-41.3%	-9'191	-70.7%
Serbia	21'266	19'317	-1'949	-9.2%	13'080	209.7%
Sierra Leone	157'531	219'861	62'329	39.6%	219'861	N/A
Singapore	15	15	0	0.0%	15	N/A
Slovakia	197'565	222'896	25'331	12.8%	56'196	33.7%
Slovenia	49'638	52'078	2'440	4.9%	19'929	62.0%
Solomon Islands	4'086	3'367	-720	-17.6%	2'060	157.6%
South Africa	30'214	40'954	10'740	35.5%	-993	-2.4%
Spain	2'354'916	2'437'891	82'975	3.5%	815'993	50.3%
Sri Lanka	70'436	73'393	2'956	4.2%	53'923	277.0%
Sudan	73'903		-73'903	-100.0%	-53'017	-100.0%
Suriname	109	52	-57	-52.5%	52	N/A
Sweden	613'964	613'964	0	0.0%	133'779	27.9%
Switzerland	172'713	177'347	4'633	2.7%	61'158	52.6%
Syrian Arab Republic	19'987		-19'987	-100.0%	-19'987	-100.0%
Taiwan	9'536	10'789	1'253	13.1%	5'774	115.1%
Tajikistan	10'340	11'818	1'478	14.3%	11'357	2466.7%
Tanzania, United Republic of	291'097	198'226	-92'872	-31.9%	83'204	72.3%
Thailand	188'451	160'802	-27'649	-14.7%	125'973	361.7%
Timor-Leste	32'472	32'311	-161	-0.5%	7'557	30.5%
Togo	38'506	127'782	89'276	231.9%	126'446	9464.5%
Tonga	1'119	1'119	0	0.0%	871	351.1%
Tunisia	286'623	297'137	10'514	3.7%	118'616	66.4%
Turkey	518'435	382'639	-135'796	-26.2%	-59'943	-13.5%
Uganda	183'598	116'376	-67'222	-36.6%	-111'790	-49.0%
Ukraine	467'980	462'225	-5'755	-1.2%	191'905	71.0%
United Arab Emirates	4'642	5'419	777	16.7%	4'461	465.7%
United Kingdom	459'275	473'500	14'225	3.1%	-165'028	-25.8%
United States of America	2'326'551	2'326'551	0	0.0%	148'080	6.8%
United States Virgin Islands	26		-26	-100.0%	0	N/A
Uruguay	2'143'640	2'742'368	598'727	27.9%	1'811'403	194.6%
Uzbekistan	932	3'781	2'849	305.9%	3'572	1709.1%
Vanuatu	8'368	2'052	-6'316	-75.5%	-145	-6.6%
Venezuela		1'490	1'490	N/A	1'432	2447.0%
Viet Nam	61'901	63'536	1'635	2.6%	40'136	171.5%
Zambia	207	691	484	234.0%	-2'911	-80.8%
Zimbabwe	848	1'043	195	23.0%	577	123.7%
Total	71'957'852	74'926'006	2'968'154	4.1%	38'257'102	104.3%

Source: FiBL survey 2022, 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 322
**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 30.0 million hectares, and all the organic areas together summed up to 104.9 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, Table 24). 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 85 and 83. More information on the use of the wild collection areas is available in the corresponding chapter, page 79.

World: Distribution of all organic areas in 2020

Source: FiBL survey 2022

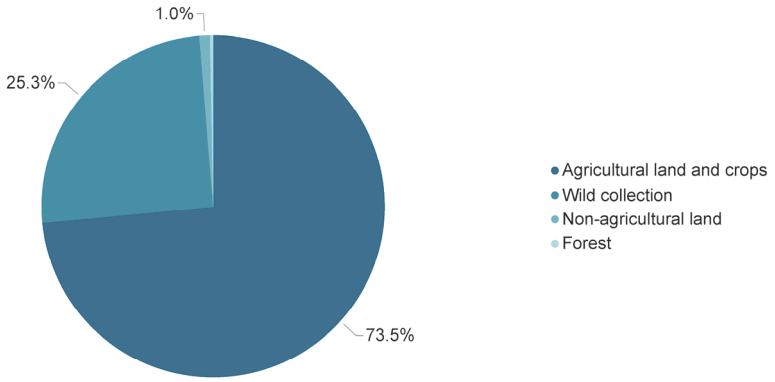


Figure 8: World: Distribution of all organic areas 2020. Total: 104.9 million hectares

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Table 8: World: Organic areas: Agricultural land (including conversion areas) and further organic areas by region in 2020

Region	Agricul-ture [ha]	Aqua-culture [ha]	Forest [ha]	Wild collection [ha]*	Other non-agri. land [ha]	Total [ha]
Africa	2'086'858		38'122	11'717'981	170	13'843'131
Asia	6'146'235	107'631		3'530'544	25'638	9'810'050
Europe	17'098'133	3	16'540	9'912'919	120	27'027'715
Latin America	9'949'461	2'122	40'011	3'075'474	988'604	14'055'674
Northern America	3'744'163		205'196	289'965		4'239'323
Oceania	35'908'876					35'908'876
World**	**74'926'006**	**109'755**	**299'868**	**28'526'883**	**1'014'533**	**104'877'045**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322; 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 2020

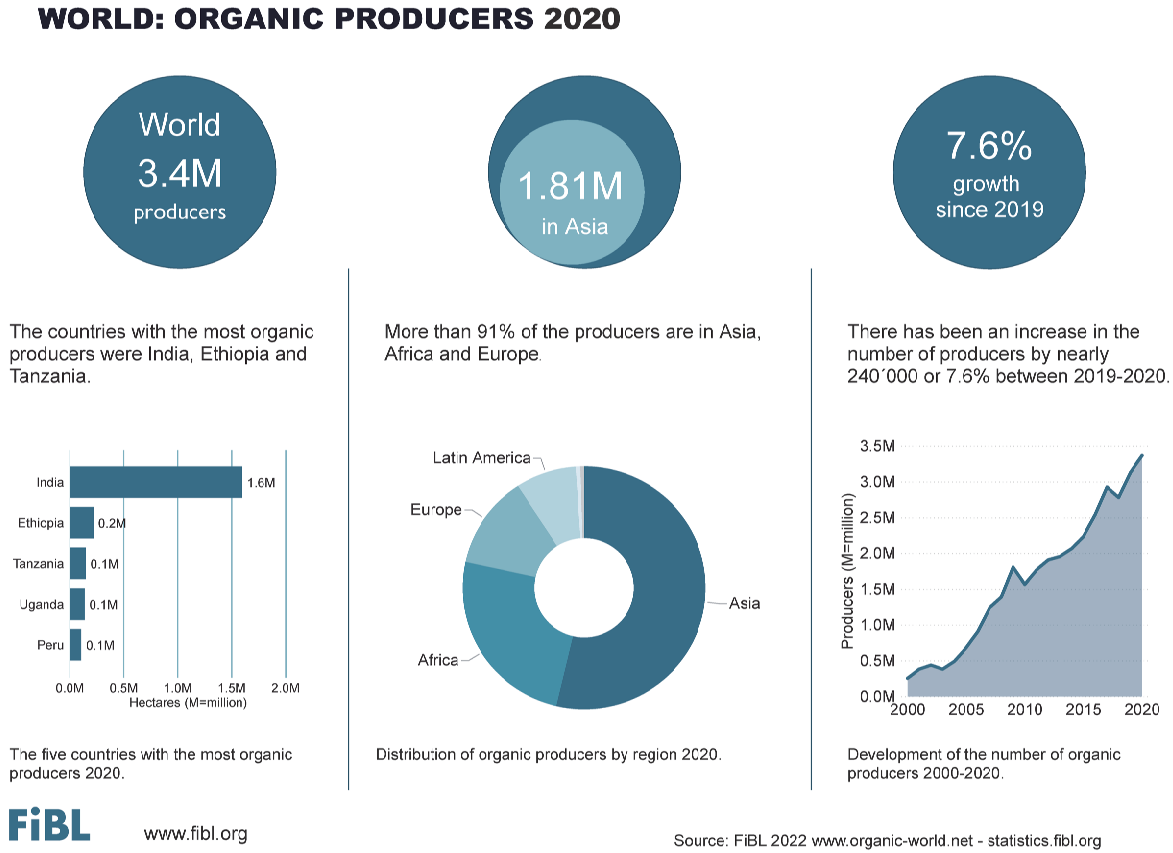
Country/Territory	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Wild collection [ha]*	Other non-agri. land [ha]	Total [ha]
Afghanistan	98					98
Albania	887			722'984		723'871
Algeria	772					772
Andorra	2					2
Argentina	4'453'639			21'782		4'475'421
Armenia	566			3'652		4'218
Australia	35'687'799					35'687'799
Austria	679'872					679'872
Azerbaijan	38'080	573		2'126		40'779
Bahamas	49					49
Bangladesh	504	5'781				6'285
Belarus	6'838		19			6'856
Belgium	99'075					99'075
Belize	454					454
Benin	38'822					38'822
Bhutan	4'095			2'223		6'318
Bolivia (Plurinational State of)	179'425			577'991		757'416
Bosnia and Herzegovina	1'692			11'579		13'271
Botswana				6'380		6'380
Brazil	1'319'454			10'605		1'330'059
British Virgin Islands	26					26
Bulgaria	116'252					116'252
Burkina Faso	66'175			201'055		267'230
Burundi	319					319
Cambodia	35'879					35'879
Cameroon	345					345
Canada	1'417'612			289'369		1'706'981
Cape Verde	3					3

Country/Territory	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Wild collection [ha]*	Other non-agri. land [ha]	Total [ha]
Chad				114'800		114'800
Channel Islands	180					180
Chile	156'819			130'526		287'345
China	2'435'000			1'651'500		4'086'500
Colombia	50'533			45'200		95'733
Comoros	1'004					1'004
Cook Islands	15					15
Costa Rica	11'465					11'465
Côte d'Ivoire	79'124					79'124
Croatia	108'610					108'610
Cuba	2'129					2'129
Cyprus	5'918					5'918
Czech Republic	539'532	3				539'535
Democratic Republic of the Congo	118'254					118'254
Denmark	299'998					299'998
Dominican Republic	117'312			3'081		120'393
Ecuador	41'537	2'122	40'007	764		84'429
Egypt	116'000					116'000
El Salvador	2'569					2'569
Estonia	220'796			447'271		668'067
Eswatini	1'156					1'156
Ethiopia	234'648			1'284		235'932
Falkland Islands (Malvinas)	31'937					31'937
Faroe Islands	251		260	0		511
Fiji	19'303					19'303
Finland	315'112			5'513'475		5'828'587
France	2'548'677					2'548'677
French Guiana (France)	3'691					3'691
French Polynesia	1'562					1'562
Georgia	1'572					1'572
Germany	1'702'240					1'702'240
Ghana	74'874		1	63'038	2	137'916
Greece	534'629					534'629
Grenada	84					84
Guadeloupe (France)	859					859
Guatemala	87'028			159'412		246'440
Guinea-Bissau	9'844					9'844
Guyana				55'449		55'449
Haiti	2'907					2'907
Honduras	66'179					66'179
Hungary	301'430					301'430
Iceland	4'709		260	216'727		221'697
India	2'657'889			1'681'296		4'339'185
Indonesia	75'793	795		230		76'817
Iran (Islamic Republic of)	11'916			50'219	20'000	82'135
Iraq	63					63
Ireland	73'952					73'952
Israel	6'287			4		6'291
Italy	2'095'380					2'095'380
Jamaica	10			7		17
Japan	11'992					11'992
Jordan	1'446					1'446

Country/Territory	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Wild collection [ha]*	Other non-agri. land [ha]	Total [ha]
Kazakhstan	114'886					114'886
Kenya	123'744			177'384		301'128
Kosovo	1'604			1'596'843		1'598'447
Kuwait	33					33
Kyrgyzstan	30'259			11'449		41'708
Lao People's Democratic Republic	3'266					3'266
Latvia	291'150					291'150
Lebanon	1'715			258		1'972
Lesotho				997'028		997'028
Liechtenstein	1'490					1'490
Lithuania	235'471					235'471
Luxembourg	6'118					6'118
Madagascar	103'817		158	5'643	132	109'750
Malawi	232					232
Malaysia	1'276					1'276
Mali	14'675			14'795		29'470
Malta	67					67
Martinique (France)	683					683
Mauritius	5			16'843		16'848
Mayotte	87					87
Mexico	215'634		4	1'853'653		2'069'291
Moldova	27'624			1'729		29'352
Mongolia	242					242
Montenegro	4'823					4'823
Morocco	11'452			335'306		346'759
Mozambique	14'438			1'800'030		1'814'468
Myanmar	10'143	20				10'163
Namibia				2'598'772		2'598'772
Nepal	9'361			24'422		33'783
Netherlands	71'607					71'607
New Caledonia	800					800
New Zealand	79'347					79'347
Nicaragua	39'076					39'076
Nigeria	54'995					54'995
Niue	43					43
North Macedonia	3'727			556'600		560'327
Norway	45'312					45'312
Oman	4					4
Pakistan	69'850					69'850
Palestine	5'218					5'218
Panama	5'929					5'929
Papua New Guinea	72'477					72'477
Paraguay	73'428				988'604	1'062'032
Peru	342'701			217'004		559'705
Philippines	191'770					191'770
Poland	507'637					507'637
Portugal	319'540					319'540
Republic of Korea	38'540					38'540
Réunion (France)	1'901					1'901
Romania	468'887					468'887
Russian Federation	615'187			221'039		836'226
Rwanda	5'188					5'188
Samoa	40'992					40'992

Country/Territory	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Wild collection [ha]*	Other non-agri. land [ha]	Total [ha]
Sao Tome and Principe	9'103					9'103
Saudi Arabia	26'632					26'632
Senegal	3'809			20'360		24'169
Serbia	19'317					19'317
Seychelles				1'223		1'223
Sierra Leone	219'861					219'861
Singapore	15					15
Slovakia	222'896					222'896
Slovenia	52'078					52'078
Solomon Islands	3'367					3'367
Somalia				940'034		940'034
South Africa	40'954		137	859'815	36	900'942
Spain	2'437'891					2'437'891
Sri Lanka	73'393					73'393
Sudan				98'044		98'044
Suriname	52					52
Sweden	613'964					613'964
Switzerland	177'347					177'347
Taiwan	10'789					10'789
Tajikistan	11'818					11'818
Tanzania, United Republic of	198'226			2'597		200'823
Thailand	160'802	462		90'716	5'638	257'618
Timor-Leste	32'311					32'311
Togo	127'782					127'782
Tonga	1'119					1'119
Tunisia	297'137		37'825			334'962
Turkey	382'639			33'283		415'922
Uganda	116'376					116'376
Ukraine	462'225		1	591'389	120	1'053'736
United Arab Emirates	5'419					5'419
United Kingdom	473'500		16'000			489'500
United States of America	2'326'551		205'196	596		2'532'342
Uruguay	2'742'368					2'742'368
Uzbekistan	3'781					3'781
Vanuatu	2'052					2'052
Venezuela (Bolivarian Republic of)	1'490					1'490
Viet Nam	63'536	100'000		12'450		175'986
Zambia	691			3'200'000		3'200'691
Zimbabwe	1'043			263'550		264'593
World**	**74'926'006**	**109'755**	**299'868**	**28'526'883**	**1'014'533**	**104'877'045**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322; Blank cells: No data available.
**Wild collection and beekeeping areas, **Total includes correction value for French overseas departments.*



Infographic 3: Organic producers 2020

Source: FiBL survey 2022

Organic producers and other operator types

Producers

There were more than 3.4 million organic producers worldwide. According to the data obtained, almost 91 percent of the producers were in Asia, Africa, and Europe (Table 10). The country with the most organic producers is India, followed by Ethiopia and Tanzania (Figure 9: World: Distribution of organic producers by region 2020 (Total: 3.4 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 almost 240'000, or 7.6 percent, compared to 2019. In Asia, Latin America, and Northern America, the number of producers increased. In Africa, Europe, and Oceania, a decrease in the number of producers was reported in 2020.

Table 10: World: Development of the numbers of producers by region 2019 to 2020

Region	2019 [no.]	2020 [no.]	1 year growth [no.]	1 year growth [%]	10 years growth [no.]	10 years growth [%]
Africa	850'781	833'986	-16'795	-2.0%	306'073	58.0%
Asia	1'588'400	1'808'464	221'228	13.9%	1'197'342	195.9%
Europe	428'677	417'977	-10'700	-2.5%	128'349	44.3%
Latin America	224'388	270'472	46'084	20.5%	-37'075	-12.1%
Northern America	22'153	22'448	295	1.3%	5'850	35.2%
Oceania	16'117	15'930	-187	-1.2%	1'744	12.3%
World	**3'129'893**	**3'368'254**	**238'360**	**7.6%**	**1'601'464**	**90.6%**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

World: Distribution of organic producers by region 2020

Source: FiBL survey 2022

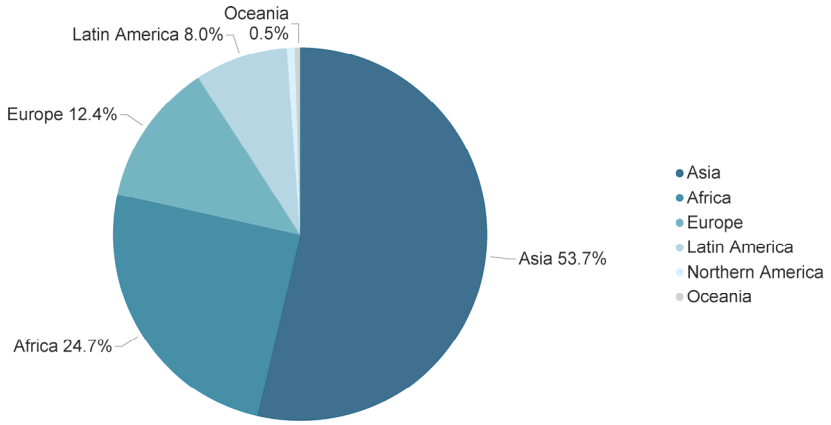


Figure 9: World: Distribution of organic producers by region 2020 (Total: 3.4 million producers)

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

World: The ten countries with the most organic producers 2020

Source: FiBL survey 2022

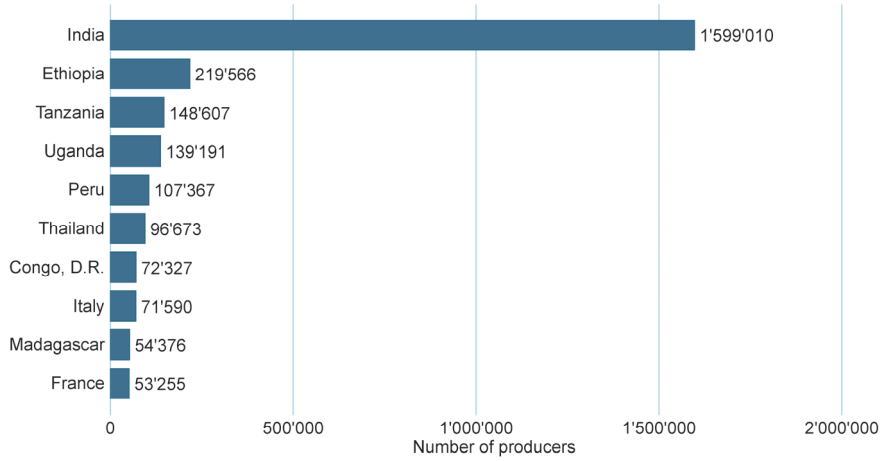


Figure 10: World: The ten countries with the largest numbers of organic producers 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Further operator types

Regarding data on further operator types, there are over 112'000 processors and approximately 7'700 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 2020

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

Country/Territory	Data year	Producers[1]	Processors	Importers	Exporters
Afghanistan	2020	1	2		2
Albania	2020	130	46		25
Algeria	2015			1	2
	2016	64	3		
Andorra	2019		3		
Argentina	2016				99
	2020	1'343	448		
Armenia	2020	29			
Australia	2016			161	299
	2018	1'829	2'077		
Austria	2019		1'691	58	4
	2020	24'480			
Azerbaijan	2020	446	446		
Bahamas	2020	1	1		
Belarus	2020	21	17	1	15
Belgium	2019		1'585	304	153
	2020	2'494			
Belize	2020	374	1		
Benin	2017	4'028			
	2020	2'439	2		10
Bhutan	2020	1'265			3
Bolivia (Plurinational State of)	2019	14'161	7'619		233
Bosnia and Herzegovina	2018				20
	2019	86	51		
Botswana	2020	1	1		1
Brazil	2019		35		
	2020	24'975			
British Virgin Islands	2020	1			
Brunei Darussalam	2020		1		
Bulgaria	2019	5'942	249	22	2
Burkina Faso	2017	19'402			
	2020	7'944	20		45
Burundi	2020	959			
Cambodia	2019	7	4		
	2020	8'886	40		32
Cameroon	2017	499			
	2020		2		14
Canada	2020	5'972	1'819		
Cape Verde	2020	223			
Chad	2017		3		3
Chile	2013				88
	2020	2'200	243		
China	2020	13'318	4'669	265	2'101
Colombia	2018				89
	2020	3'160	86		
Comoros	2019		7		7
	2020	767			

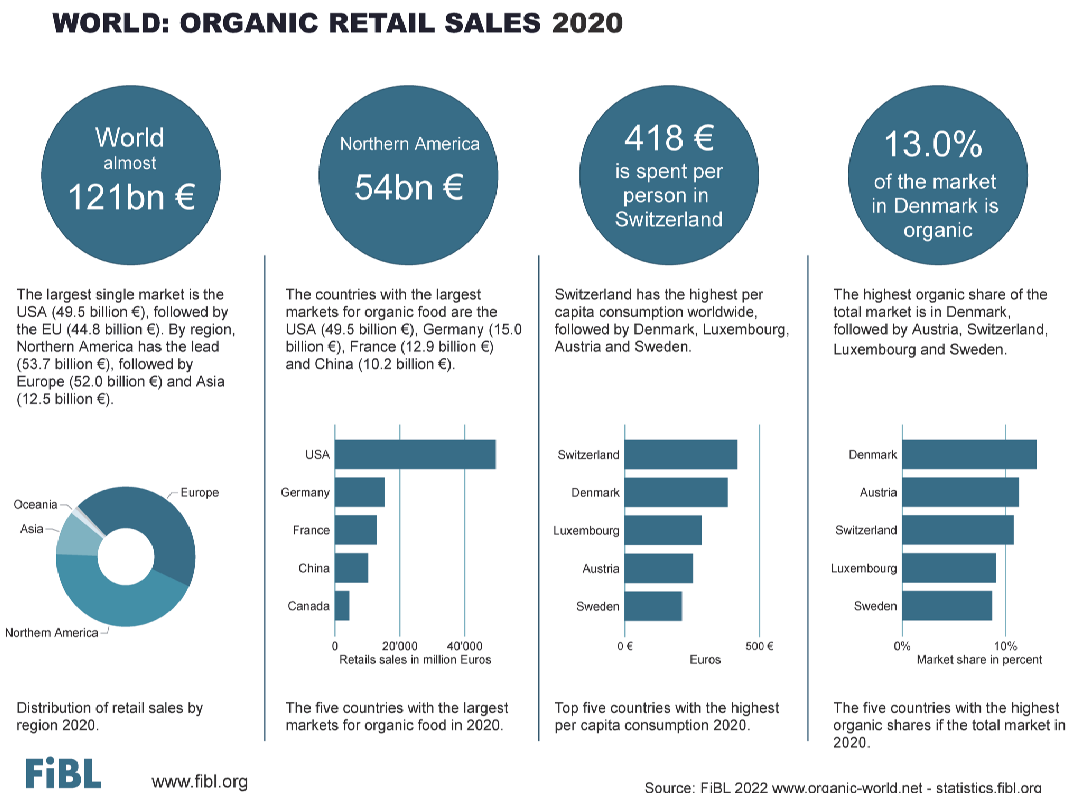
[1] Some countries report only the numbers of companies, projects or grower groups, which may each compromise a number of producers.

Country/Territory	Data year	Producers[1]	Processors	Importers	Exporters
Cook Islands	2019	58			
Costa Rica	2019		42		
	2020	47			50
Côte d'Ivoire	2017	2'770			
	2020	110	9		16
Croatia	2019	5'153	395	22	3
Cuba	2019	8	4		1
Cyprus	2020	1'223	70	16	0
Czech Republic	2020	4'669	852	324	154
Democratic Republic of the Congo	2019		19		17
	2020	72'327			
Denmark	2019			101	104
	2020	4'186	1'162		
Dominican Republic	2019				136
	2020	15'563	9		
Ecuador	2020	13'711	53	9	110
Egypt	2019	970	242		242
El Salvador	2019		10		
	2020	375			
Equatorial Guinea	2020				
Estonia	2020	2'050	176	38	18
Eswatini	2020	2	1		1
Ethiopia	2018	86'715			
	2019		123		
	2020	132'851	43		42
Falkland Islands (Malvinas)	2020	3			
Faroe Islands	2020	1	1		
Fiji	2020	204			
Finland	2020	5'102	466	56	33
France	2019		19'311	662	
	2020	53'255			
French Guiana (France)	2020	98			
French Polynesia	2020	22			
Georgia	2014		2		
	2015	1'075			
	2020	1			
Germany	2020	35'396	17'350	1'916	1'349
Ghana	2017	3'147			
	2019		1		
	2020	765	20		37
Greece	2020	29'869	1'653	45	40
Grenada	2018	23			
	2019		5		
Guadeloupe (France)	2020	181			
Guatemala	2011				92
	2020	5'366	76	3	
Guinea	2020		0		3
Guinea-Bissau	2020	1	1		
Guyana	2018		1		1
Haiti	2018	4'631			6
	2020	1	1		1
Honduras	2009			1	25
	2020	15'046	54		
Hungary	2020	5'128	521	48	0
Iceland	2020	27	20	2	
India	2020	1'599'010	1'703		
Indonesia	2017	17'836			
	2019		5		
	2020		185		370
Iran (Islamic Republic of)	2019		23		
Ireland	2016			24	
	2017	1'725	26		2
Israel	2020	344	151	81	43
Italy	2020	71'590	22'689	544	885
Jamaica	2019		4		
	2020		1		
Japan	2018	3'678	3'361	302	
Jordan	2016				4
	2017	23	5		
Kazakhstan	2015			7	
	2018	15			
	2019		4		
	2020	279			
Kenya	2020	42'335	22	1	79
Kosovo	2020	66	21		
Kuwait	2020	1	1	1	24
Kyrgyzstan	2020	1'144	4		3
Lao People's Democratic Republic	2019		1		
	2020	871			

Country/Territory	Data year	Producers[1]	Processors	Importers	Exporters
Latvia	2019	4'171	65	5	0
Lebanon	2020	122	62	4	1
Lesotho	2020	1	1		1
Liechtenstein	2020	46			
Lithuania	2020	2'417	124	3	170
Luxembourg	2020	114	104	7	0
Madagascar	2017	1'728			
	2020	52'648			
Malawi	2020	21	1	1	1
Malaysia	2020	30	22		19
Mali	2017	11'004			
	2020		0		8
Malta	2020	25	8	17	0
Martinique (France)	2020	107			
Mauritius	2019	19	5		5
	2020	1	1		1
Mayotte	2020	12			
Mexico	2020	45'954	544		
Moldova	2020	196	18	5	31
Monaco	2019		2		
Mongolia	2019		1		
	2020	314			
Montenegro	2020	423	19		
Morocco	2020	423	253		83
Mozambique	2019	134	1		
	2020	260	10		9
Myanmar	2020	68	17		17
Namibia	2019		7		
	2020	9	8		2
Nepal	2017	983			
	2018		6		
Netherlands	2020	1'937	993	479	132
New Zealand	2020	685	345		119
Nicaragua	2019				61
	2020	8'511	32		
Niger	2020		0		0
Nigeria	2017	310			
	2020	6	10		6
North Macedonia	2020	863	24	7	9
Norway	2020	1'981	471	103	0
Oman	2019				
Pakistan	2020	934	55		53
Palestine	2020	1'515	47		3
Panama	2011		2		
	2018	18			6
	2020	1			
Papua New Guinea	2020	10'159			
Paraguay	2019		24		
	2020	5'850			34
Peru	2020	107'367	47		
Philippines	2019		11		
	2020	11'906	78		77
Poland	2020	18'598	668	267	319
Portugal	2020	5'945	1'036	47	36
Puerto Rico	2020		1		
Republic of Korea	2016		729		
	2020	23'750			
Réunion (France)	2020	402			
Romania	2020	9'647	201	30	27
Russian Federation	2019		12		
	2020	48	4		
Rwanda	2019		1		
	2020	8'368	5		4
Saint Lucia	2019	1			
Samoa	2019		1		2
	2020	1'919			
San Marino	2018		2		
Sao Tome and Principe	2017	3'563			5
	2020	2	2		3
Saudi Arabia	2015				2
	2020	312			
Senegal	2013	18'369			
	2017		19		15
	2020	4	1		
Serbia	2020	439	101	56	100
Sierra Leone	2019	5'500	1		1
	2020	5	6		2
Singapore	2019		15		
	2020		5	10	14

Country/Territory	Data year	Producers[1]	Processors	Importers	Exporters
Slovakia	2020	716	119	43	5
Slovenia	2020	3'685	139	28	0
Solomon Islands	2020	898			
Somalia	2017		1		
	2020	1	1		1
South Africa	2019		35		
	2020	220	161	9	107
Spain	2020	44'493	5'561	416	138
Sri Lanka	2019	199			
	2020	1'791	262		279
Suriname	2018		1		1
	2019	1			
Sweden	2020	5'489	1'048	298	15
Switzerland	2019		1'245	498	32
	2020	7'561			
Taiwan	2019		11		
	2020	4'117			
Tajikistan	2018				1
	2020	166			
Tanzania, United Republic of	2013	148'607			
	2019		2		2
	2020		6		4
Thailand	2020	96'673	201		53
Timor-Leste	2020	3	3		4
Togo	2017	19'708			
	2018	1'770			
	2019		1		
	2020	25'793	2		25
Tonga	2019	81	1		1
Trinidad and Tobago	2019		4		
Tunisia	2020	6'525	669	6	159
Turkey	2020	52'590	1'844	84	499
Uganda	2018	63'248			
	2019	17'406	46		1
	2020	58'537	21		19
Ukraine	2020	419	70		
United Arab Emirates	2020	152	5	9	9
United Kingdom	2019	3'581	2'566	216	
United States of America	2019	16'476			
United States Virgin Islands	2017		1		
Uruguay	2020	1'388	12		13
Uzbekistan	2020	26			
Vanuatu	2020	75			
Venezuela (Bolivarian Republic of)	2018		1		1
	2020	7	1		
Viet Nam	2018		555	40	60
	2019	17'174			
Zambia	2020	10'100	9		8
Zimbabwe	2020	963	9		10
World*		**3'368'254**	**112'911**	**7'703**	**9'963**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322
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Infographic 4: Organic retail sales 2020

Source: FiBL survey 2022

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 140), 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 48 countries (25 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 almost 121 billion euros in 2020. The country with the largest market for organic food was the United States (49.5 billion euros), followed by Germany (15.0 billion euros), France (12.7 billion euros) and China (10.2 billion euros). The largest single market was the United States, followed by the European Union (44.8. billion euros) and China (Figure 81). By region, Northern America had the lead (53.7 billion euros), followed by Europe (52.0 billion euros) and Asia (12.5 billion euros) (Table 12).

Market growth was noted in all countries for which 2020 data were available, and in many cases, it was in the double digits. Canada was the country that registered the biggest growth; the market increased by 26.1 percent. Whereas the highest per capita consumption by region was in Northern America (147 euros), by country, it was highest in Europe. In 2020, Switzerland had the highest per capita consumption (418 euros) worldwide, followed by Denmark (384 euros), Luxembourg (285 euros) and Austria (254 euros) (Table 13).

Looking at the shares the organic market has of the total market, the leader is Denmark (13.0 percent), followed by Austria (11.3 percent), Switzerland (10.8 percent), Luxembourg (9.1 percent) and Sweden (8.7 percent) (Table 13).

Export and import data

International trade data is becoming available for more and more countries. These can be expressed in metric tons or as values. Some countries provide breakdowns by crop and product. Table 13 shows the values of total exports where available. Forty-five countries provided data on export values. Exports to the European Union and to the United States are available from the European Commission (page 146) and the USDA[2].

Import data are not available for many countries. Since 2018, the European Union has collected import data; these are available on page 146. Data on US organic imports and exports (values and quantity) are available on the USDA website.

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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).

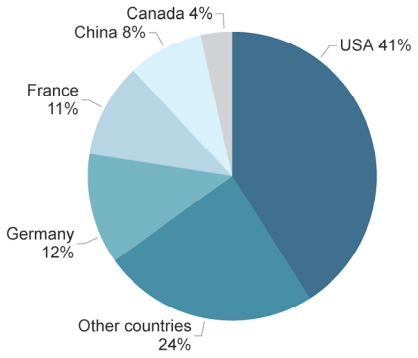
[2] The data can be found at http://apps.fas.usda.gov/gats/ExpressQuery1.aspx. Go to “standard query” and choose “Organics selected”.

Table 12: Global market data: Retail sales and per capita consumption by region 2020

Region	Retail sales [Million €][1]	Per capita consumption [€]
Africa*	16	0.01
Asia	12'540	2.7
Europe	52'000	63.2
Latin America**	778	1.2
Northern America	53'717	147.5
Oceania	1'594	38.4
World	**120'647**	**15.8**

Source: FiBL-AMI survey 2022, based on data from government bodies, the private sector and market research companies. For data sources, see annex, page 322.
** Data from Ethiopia (2015) and Kenya.*
*** Data from Belize, Brazil, Chile, Jamaica, Mexico, and Peru, some of which have not been updated for several years.*

Global market for organic food: Distribution of retail sales by country 2020
Source: FiBL-AMI survey 2022, based on retail sales with organic food



Global market for organic food: Distribution of retail sales by region 2020
Source: FiBL-AMI survey 2022, based on retail sales with organic food

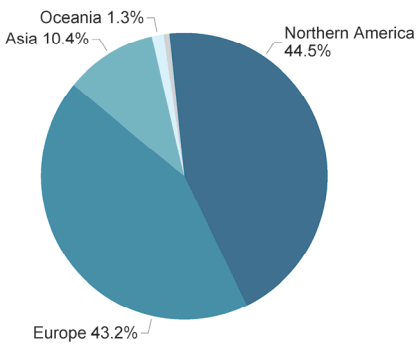


Figure 11: Global market for organic food: Distribution of retail sales by country 2020
Figure 12: Global market for organic food: Distribution of retail sales by region 2020

Source: FiBL-AMI survey 2022, based on data from government bodies, the private sector and market research companies. For data sources, see annex, page 322

[1] According to the Central European Bank, 1 euro corresponded to 1.1422 US dollars in 2020.

World: The countries with the largest markets for organic food 2020

Source: FiBL-AMI survey 2022

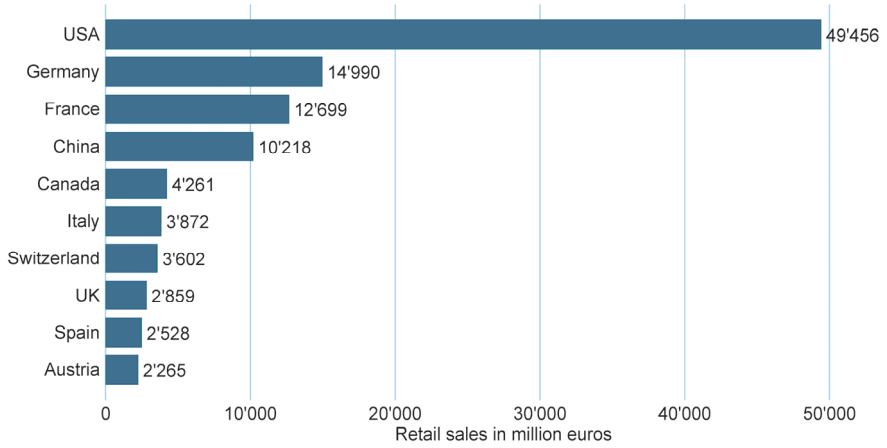


Figure 13: Global market: The countries with the largest markets for organic food 2020

Source: FiBL-AMI survey 2022, based on data from government bodies, the private sector and market research companies. For data sources, see annex, page 322

World: The ten countries with the highest per capita consumption 2020

Source: FiBL-AMI survey 2022

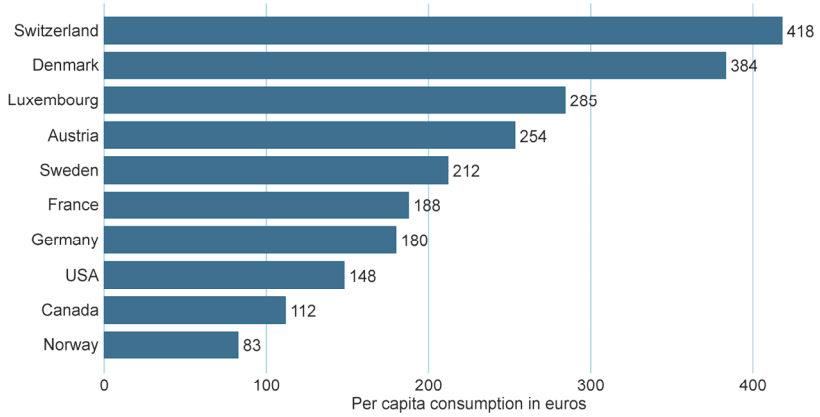


Figure 14: Global market: The ten countries with the highest per capita consumption 2020

Source: FiBL-AMI survey 2022, based on data from government bodies, the private sector and market research companies. For data sources, see annex, page 322

Table 13: Global market data: Retail sales, organic share of all retail sales, per capita consumption and exports by country 2020

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 included in the FiBL database.

Country	Data year	Retail sales [Million €][1]	Organic share [%]	€/person	Exports [Million €]
Australia	2018				433.6
	2020	1'422		55	
Austria	2020	2'265	11.3	254	
Azerbaijan	2011	3		0	
Belgium	2020	892	3.2	77	
Belize	2015				0.3
Bhutan	2018	0.03	0.3	0	0.0
Bosnia and Herzegovina	2017	0.4		0	
	2018				6.3
Brazil	2016	778		4	126.5
Bulgaria	2019		0.4		
	2020	33		5	
Canada	2020	4'261	3.3	112	416.0
Chile	2020				273.7
China	2020	10'218		7	805.9
Costa Rica	2009				19.0
Croatia	2011				2.9
	2018	99	2.2	24	
Czech Republic	2019	204	1.5	19	116.6
Denmark	2019				406.1
	2020	2'240	13.0	384	
Estonia	2019	62	3.7	47	27.0
Ethiopia	2015	13		0	181.1
Finland	2019				27.5
	2020	409	2.6	74	
France	2020	12'699	6.5	188	887.0
Germany	2020	14'990	6.4	180	
Greece	2017	66	0.3	6	
Hungary	2009				20.0
	2015	30	0.3	3	
India	2017	186		0	
	2020				911.4
Ireland	2020	189	2.5	39	
Italy	2020	3'872	3.5	64	2'619.0
Japan	2017		1.4		
	2018	1'419		11	
Kazakhstan	2015				9.0
Kenya	2016				24.4
	2020	3		0	

[1] According to the Central European Bank, 1 euro corresponded to 1.1422 US dollars in 2020 in 2019.

Country	Data year	Retail sales [Million €][1]	Organic share [%]	€/person	Exports [Million €]
Kosovo	2015				6.0
Kyrgyzstan	2019				288.0
Latvia	2017	51	1.5	6	51.0
Lithuania	2017	51	1.0	18	45.0
Luxembourg	2020	171	9.1	285	
Mexico	2013				372.5
Mongolia	2020	1		0	
Netherlands	2016				1'200.0
	2020	1'361	3.3	78	
New Zealand	2017		2.2	33	
	2020	172			238.4
Norway	2016		1.7		
	2019	442		83	
Philippines	2020				84.7
Poland	2019	314	0.6	8	
Portugal	2011	21	0.2	2	
Republic of Korea	2020	391		8	9.5
Romania	2011				200.0
	2016	41	0.2	2	
Russian Federation	2009				4.0
	2018	183			
Saudi Arabia	2018	296		9	
Serbia	2016				18.9
Singapore	2017	16		3	
	2020				0.4
Slovenia	2009				0.1
	2013	49	1.8	27	
Spain	2020	2'528	2.5	53	1'165.0
Sri Lanka	2015				258.7
Sweden	2018				117.0
	2020	2'193	8.7	212	
Switzerland	2020	3'602	10.8	418	
Thailand	2014	12		0	27.5
Turkey	2014	46		1	
	2017				182.0
Uganda	2015				49.6
Ukraine	2020	38		1	178.6
United Kingdom	2016				193.9
	2019		1.8		
	2020	2'859		43	
United States of America	2020	49'456	6.0	148	566.6
Viet Nam	2020				293.3
World		**120'647**		**15.8**	

Source: FiBL-AMI survey 2022, based on data from government bodies, the private sector and market research companies. For data sources, see annex, page 322
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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 2.9 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, 16.2 million hectares, is located in countries on this list.

If wild collection and beekeeping areas are included, the total area is 38.1 million hectares. Almost half of the agricultural land of the countries on the DAC list is located in Latin American countries (7.0 million hectares), with Asia (6.0 million) and Africa (2.1 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 (20.7 percent), Samoa (14.5 percent) and Timor-Leste (8.5 percent). Argentina, with by far the largest area under organic cultivation (with 4.5 million hectares), is ranked twelfth (3.0 percent) when the organic agricultural area is expressed as a share of the total agricultural area. The organic area shares of the total agricultural land of the top ten countries on the DAC list are comparable to that of many European countries, and the high organic shares can be attributed in part to a high production potential for, and focus on, exports. Support activities may also play a role. However, of the countries on the DAC list, only 13 percent have an organic share higher than one percent of the total agricultural area (Figure 16).

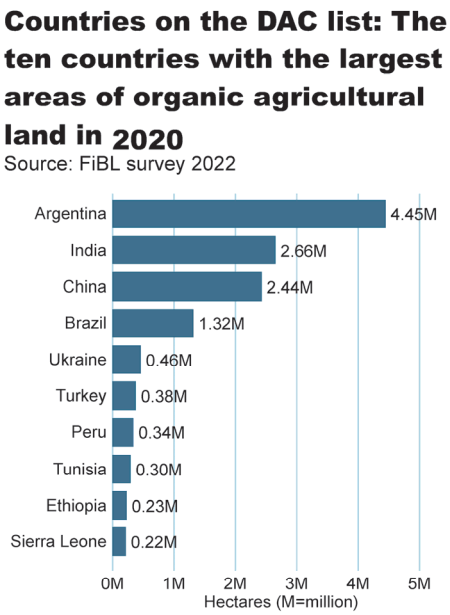
Land use details were available for more than 76 percent of the agricultural land of the countries on the DAC list; crop data is missing for some of the world's largest producing countries (India and Brazil). Available statistics show that organic arable land areas constituted over 27 percent of the organic agricultural land, organic grassland/grazing over 29 percent, and organic permanent crops more than 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 2015-2020

Region	2015	2016	2017	2018	2019	2020
Africa	1'624'493	1'609'193	1'800'862	1'747'376	1'936'546	2'084'871
Asia	3'765'408	4'809'139	5'848'896	6'160'381	5'628'070	6'046'525
Europe	947'430	957'978	861'048	1'002'420	1'046'226	904'537
Latin America	5'475'064	5'681'297	6'058'204	5'809'394	6'094'996	7'013'032
Oceania	73'792	113'154	158'846	221'073	94'479	139'353
Total	**11'886'188**	**13'170'761**	**14'727'855**	**14'940'644**	**14'800'317**	**16'188'318**

Source: FiBL surveys 2017-2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322



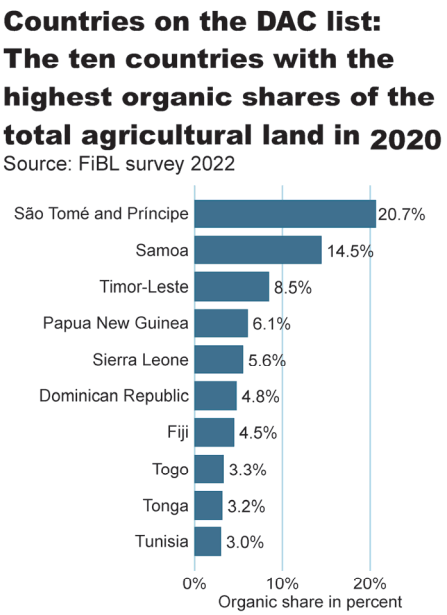


Figure 15 (left): Countries on the DAC list: The ten countries with the largest areas of organic agricultural land in 2020

Figure 16 (right): Countries on the DAC list: The ten countries with the highest organic shares of the total agricultural land in 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

[1] The development is displayed for all countries, which are on the 2020 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 74.9 million hectares of organic agricultural land in 2020 were grassland/grazing areas (over 50.8 million hectares). The cropland area (arable land with 13.1 million hectares and permanent crops with 5.2 million hectares) constituted 18.4 million hectares, which was 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 93 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 96 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 nuts, olives and coffee; among the main arable crops are textile crops (cotton), oilseeds (sesame and soybeans) and root crops. For land use details in Africa, see page 192.
– 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, textile crops, medicinal plants, and dry pulses are important. For land use details in Asia, see page 202.
– 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 (47 percent) is mainly used for the cultivation of cereals and by green fodder (3 million hectares and almost 2.7 million hectares respectively). Permanent crops account for almost eleven percent of the organic agricultural land. Almost one-third of this land was used for olives,

[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

followed by grapes, nuts, and temperate fruits. For land use details, see page 234).

– Latin America and the Caribbean: More than 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. Forty-six 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 223.
– Northern America: Arable land and permanent grassland/grazing areas are contributing the majority of the total organic agricultural land, 33 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 Northern America, see page 292.
– 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 308.

World: Distribution of main land use types by region 2020

Source: FiBL survey 2022

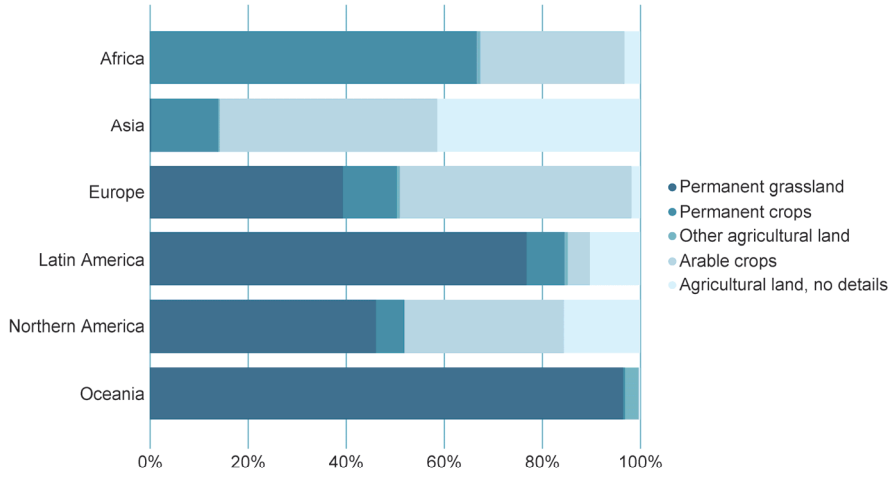


Figure 17: World: Distribution of main land use types by region 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

World: Distribution of main land use types and key crop categories 2020

FiBL survey 2022, based on information from the private sector, certifiers, and governments.

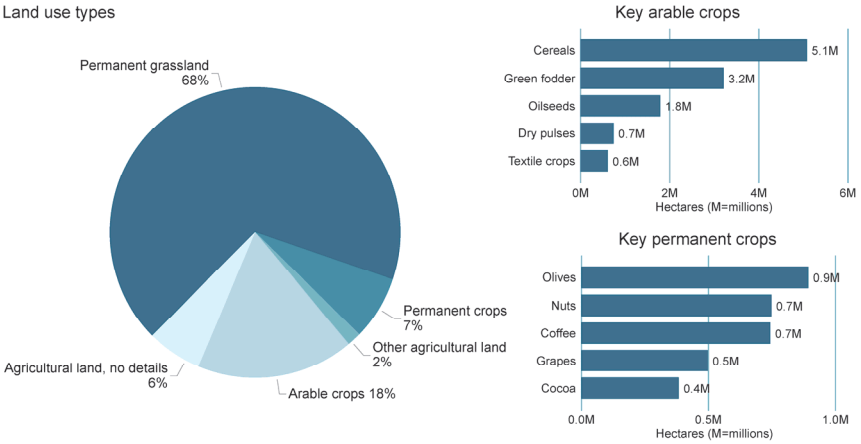


Figure 18: World: Distribution of main land use types and key crop categories 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

World: Development of organic arable land, permanent cropland and permanent grassland/grazing areas 2004 - 2020

Source: FiBL-IFOAM-SOEL surveys 2006-2022

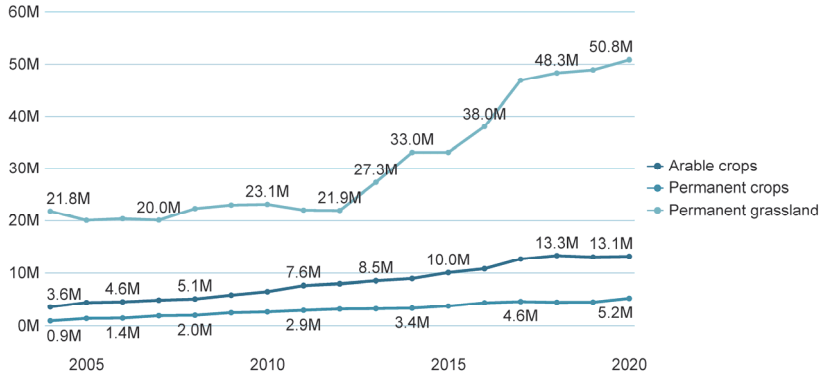


Figure 19: World: Development of organic arable land, permanent cropland and permanent grassland/grazing areas 2004-2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Table 15: World: Land use in organic agriculture by region (including in-conversion areas) 2020

Land use	Africa [ha]	Asia [ha]	Europe [ha]	Latin America [ha]	Northern America [ha]	Oceania [ha]	World [ha]
Arable crops	619'807	2'731'096	8'069'529	449'967	1'218'444	51'386	13'140'229
Permanent crops	1'383'948	843'673	1'875'629	770'133	217'608	147'370	5'238'362
Permanent grassland	915	16'665	6'739'377	7'646'895	1'726'622	34'672'149	50'802'623
Total*	**2'086'858**	**6'146'235**	**17'098'133**	**9'949'461**	**3'744'163**	**35'908'876**	**74'926'006**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Table 16: World: Land use and crop categories in organic agriculture worldwide 2020

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		***4'429'117***
Arable crops	Arable crops, no details	71'594
	Arable crops, other	148'848
	Cereals	5'088'503
	Dry pulses	748'345
	Fallow land, crop rotation	473'323
	Flowers and ornamental plants	402
	Fresh vegetables and melons	421'563
	Hops	682
	Industrial crops	49'742
	Medicinal and aromatic plants	255'541
	Mushrooms and truffles	1'240
	Oilseeds	1'795'143
	Plants harvested green	3'217'840
	Root crops	141'243
	Seeds and seedlings	64
	Strawberries	9'573
	Sugarcane	98'028
	Textile crops	617'915
	Tobacco	640
Arable crops total		***13'140'229***
Permanent crops	Berries	66'050
	Citrus fruit	140'837
	Cocoa	384'507
	Coconut	294'234
	Coffee	744'942
	Flowers and ornamental plants, permanent	47
	Fruit	62'083
	Fruit of temperate climate zones	256'317
	Fruit, tropical and subtropical	292'535
	Fruit/nuts/berries	6'067
	Grapes	498'445
	Medicinal and aromatic plants, permanent	90'954
	Nurseries	621
	Nuts	749'055
	Oleaginous fruits	11'850
	Olives	894'989
	Permanent crops, other	565'902
	Tea/Mate	178'928
Permanent crops total		***5'238'362***
Permanent grassland		***50'802'623***
World*		**74'926'006**

*Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322.. *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 constituted 18 percent of the world's organic agricultural land and 1 percent of the world's arable cropland.

Compared to 2019, organic arable land increased by 1.0 percent.

More than 60 percent of the arable land was located in Europe, followed by Asia (21 percent) and Northern America (9 percent) (Figure 20). Most of the arable cropland was used for cereals, including rice (5.1 million hectares), green fodder (3.2 million hectares) and oilseeds (1.8 million hectares) (Figure 21 and Table 17).

Table 17: Use of organic arable land (including in-conversion areas), 2019 and 2020 compared

Crop group	2019 [ha]	2020 [ha]	Change 2019-2020 [ha]	Organic share [%]
Cereals	5'018'958	5'088'503	69'545	0.7
Dry pulses	806'210	748'345	-57'865	0.8
Flowers and ornamental plants	12'633	402	-12'231	0.5
Fresh vegetables and melons	430'365	421'563	-8'803	0.7
Green fodder from arable land	3'236'934	3'217'840	-19'093	7.4
Hops	434	682	249	0.7
Industrial crops	16'169	49'742	33'573	N/A
Medicinal and aromatic plants	319'718	255'541	-64'177	9.2
Mushrooms and truffles	12'569	1'240	-11'328	1.2
Oilseeds	1'657'056	1'795'143	138'087	0.8
Root crops	100'272	141'243	40'971	0.2
Strawberries	7'253	9'573	2'320	2.6
Sugarcane	88'542	98'028	9'487	0.4
Textile crops	449'219	617'915	168'697	1.5
Tobacco	725	640	-85	0.02
World*	**13'004'685**	**13'140'229**	**135'544**	**1.01**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322
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.*

World: Distribution of organic arable cropland by region 2020

Source: FiBL survey 2022

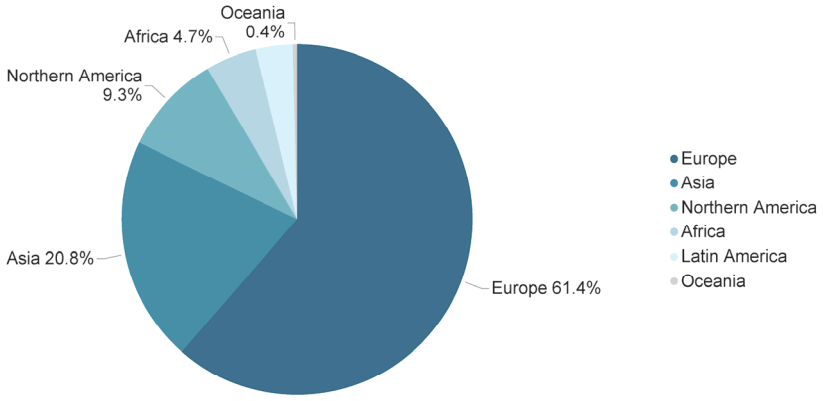


Figure 20: World: Distribution of organic arable cropland by region 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

World: Distribution of organic arable cropland by crop group 2020

Source: FiBL survey 2022

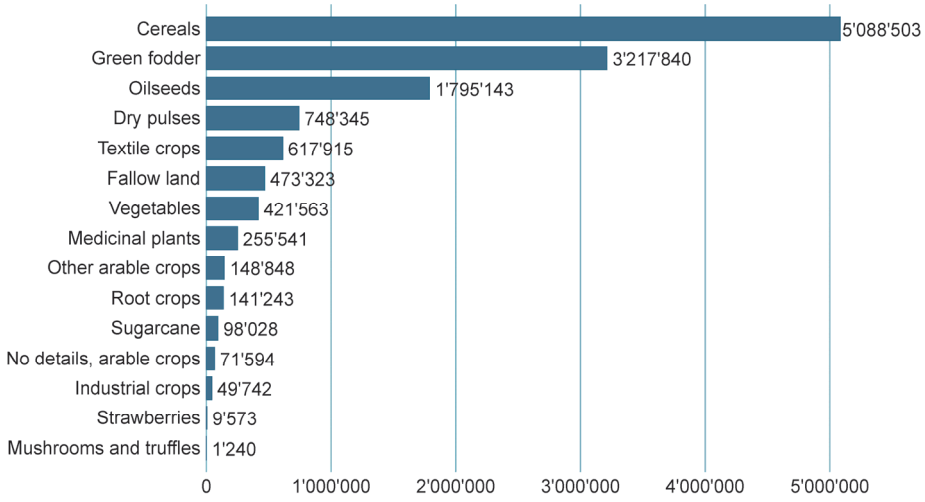


Figure 21: World: Use of arable cropland by crop group 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Permanent crops

Permanent crops accounted for more than 5.2 million hectares, which is 3.0 percent of the world's permanent cropland. Compared with 2019, an increase of more than 712'000 hectares, or 15.7 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 almost 3 percent of the total.

Most of the permanent cropland is in Europe (almost 1.9 million hectares), followed by Africa (nearly 1.4 million hectares) and Asia (over 0.8 million hectares) (Table 15 and Figure 22). The most important crops are olives, with nearly 0.9 million hectares, constituting almost 17 percent of the organic permanent cropland, followed by nuts (more than 0.7 million hectares), coffee (0.7 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), 2019 and 2020 compared

Crop group	2019 [ha]	2020 [ha]	Change 2019-2020 [ha]	Organic share [%]
Berries	74'669	66'050	-8'619	11.7
Citrus fruit	102'897	140'837	37'941	1.4
Cocoa	376'008	384'507	8'499	3.1
Coconut	238'732	294'234	55'502	2.5
Coffee	654'560	744'942	90'383	6.7
Flowers and ornamental plants, permanent	23	47	23	N/A
Fruit	20'451	62'083	41'633	1.1
Fruit of temperate climate zones	308'543	256'317	-52'226	2.2
Fruit, tropical and subtropical	235'414	292'535	57'122	1.0
Fruit/nuts/berries	4'027	6'067	2'039	N/A
Grapes	467'760	498'445	30'685	7.2
Medicinal and aromatic plants, permanent	87'487	90'954	3'467	2.5
Nurseries	777	621	-156	N/A
Nuts	558'028	749'055	191'026	4.6
Olives	881'543	894'989	13'446	8.4
Tea/mate	181'978	178'928	-3'051	3.3
World*	**4'526'152**	**5'238'362**	**712'210**	**2.8**

Source: FiBL survey 2022, based on data from governments, the private sector, and certifiers. For detailed data sources, see annex, page 322
**Total includes permanent crop groups, for which no further details were available.*

World: Distribution of organic permanent cropland by region 2020

Source: FiBL survey 2022

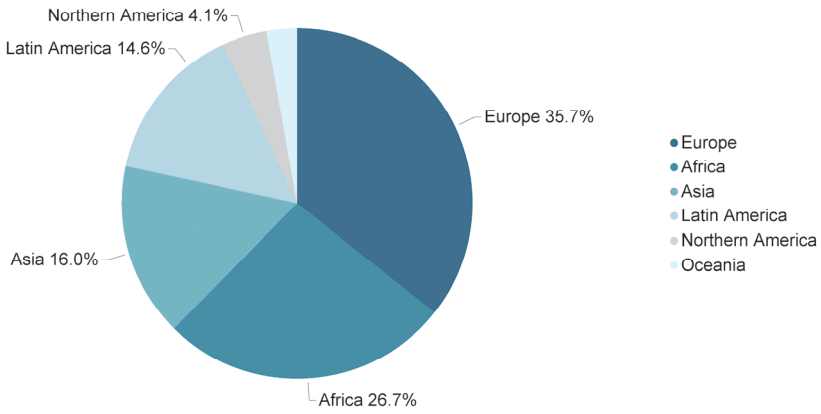


Figure 22: World: Distribution of permanent cropland by region 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

World: Distribution of organic permanent cropland by crop group 2020

Source: FiBL survey 2022

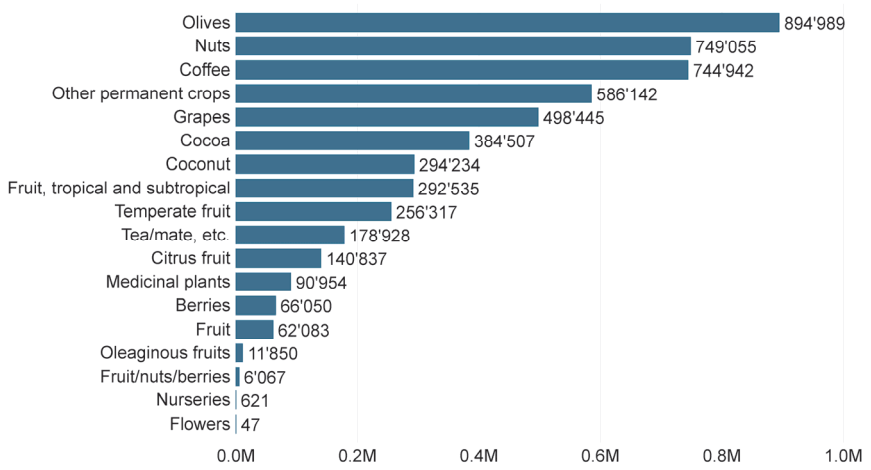


Figure 23: World: Use of permanent cropland by crop group 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

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 28.2 million hectares was reported in 2020. The organic wild collection areas are concentrated in Africa, Europe, Asia and Latin America (

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 Mexico (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 2019 and 2020 compared

Region	2019 [ha]	2020 [ha]	Change 2019-2020 [ha]	Change 2019-2020 [%]
Africa	13'861'663	11'717'981	-2'143'682	-15.5%
Asia	3'221'918	3'530'544	308'626	9.6%
Europe	8'785'793	9'912'919	1'127'126	12.8%
Latin America	4'593'699	3'075'474	-1'518'225	-33.1%
Northern America	24'714	289'965	265'251	1'073.3%
Oceania	112		-112	-100.0%
World	**30'487'898**	**28'526'883**	**-1'961'015**	**-6.4%**

Source: FiBL survey 2022, based on data from governments, the private sector, and certifiers.
For detailed data sources, see annex, page 322

Table 20: Wild collection and beekeeping areas by crop group 2020

Land use	Area [ha]
Apiculture	2'540'848
Berries, wild collection	283'459
Forest products	2'077
Fruit, wild collection	710'562
Marula, wild collection	90'225
Medicinal and aromatic plants, wild	3'886'743
Nuts, wild collection	1'115'268
Oil plants, wild collection	33'197
Palmito, wild	56'649
Permanent crops, other	20'240
Rose hips, wild collection	1'421'703
Seaweed	200'015
Wild collection, no details	18'165'898
World	**28'526'883**

Source: FiBL survey 2022, 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 322

World: Distribution of organic wild collection and beekeeping areas by region in 2020

Source: FiBL survey 2022

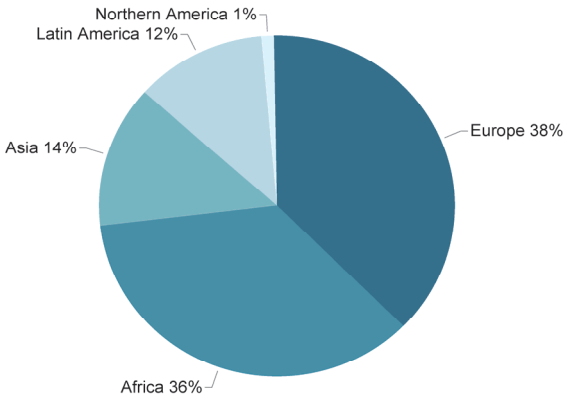


Figure 24: World: Distribution of organic wild collection and beekeeping areas by region in 2020

Source: FiBL survey 2022, based on data from government bodies, the private sector, and certifiers. For detailed data sources, see annex, page 322

World: The ten countries with the largest organic wild collection and beekeeping areas in 2020

Source: FiBL survey 2022

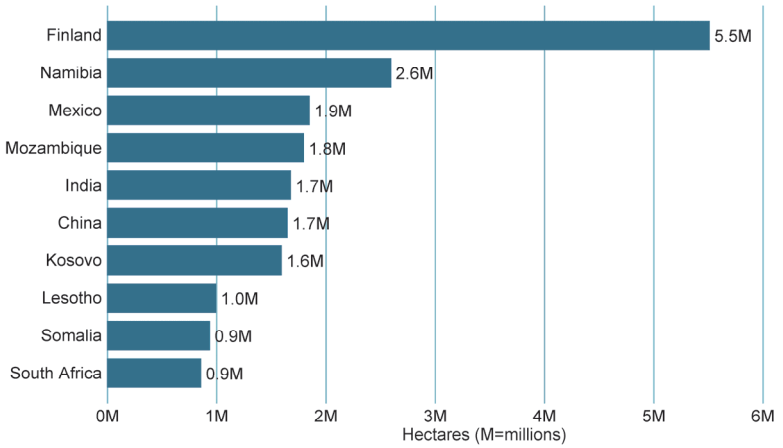


Figure 25: World: The ten countries with the largest organic wild collection and beekeeping areas in 2020

Source: FiBL survey 2022, based on data from government bodies, the private sector, and certifiers. For detailed data sources, see annex, page 322

Table 21: Wild collection and beekeeping areas by country 2020

Country	Land use	Area [ha]
Albania	Wild collection, no details	720'734
	Wild collection, other	2'250
Argentina	Wild collection, no details	21'782
Armenia	Wild collection, no details	3'652
Azerbaijan	Wild collection, no details	2'126
Bhutan	Wild collection, no details	2'223
Bolivia (Plurinational State of)	Nuts, wild collection	577'991
Bosnia and Herzegovina	Wild collection, no details	11'579
Botswana	Marula, wild collection	6'380
Brazil	Nuts, wild collection	10'578
	Wild collection, other	27
Burkina Faso	Nuts, wild collection	201'055
	Seaweed	0
Canada	Berries, wild collection	282'764
	Wild collection, no details	6'605
Chad	Wild collection, other	114'800
Chile	Wild collection, no details	130'526
China	Wild collection, no details	1'651'500
Colombia	Fruit, wild collection	2'500
	Palmito, wild	3'200
	Wild collection, no details	39'500
Dominican Republic	Wild collection, no details	3'081
Ecuador	Wild collection, no details	764
Estonia	Wild collection, no details	447'271
Ethiopia	Bee pastures	1'284
Faroe Islands	Wild collection, no details	0
Finland	Wild collection, no details	5'513'475
Ghana	Nuts, wild collection	62'891
	Wild collection, no details	147
Guatemala	Medicinal and aromatic plants, wild	39'766
	Wild collection, no details	119'647
Guyana	Forest products	2'000
	Palmito, wild	53'449
Iceland	Medicinal and aromatic plants, wild	16'712
	Seaweed	200'015
India	Wild collection, no details	1'681'296
Indonesia	Wild collection, no details	230
Iran (Islamic Republic of)	Apiculture	39'564
	Wild collection, no details	10'655
Israel	Berries, wild collection	4
Jamaica	Wild collection, no details	7
Kenya	Medicinal and aromatic plants, wild	121'625
	Oil plants, wild collection	1'505
	Wild collection, other	54'254
Kosovo	Wild collection, no details	1'596'843
Kyrgyzstan	Wild collection, no details	11'449
Lebanon	Nuts, wild collection	258
Lesotho	Rose hips, wild collection	997'028
Madagascar	Forest products	77
	Fruit, wild collection	1'223
	Medicinal and aromatic plants, wild	4'343
Mali	Nuts, wild collection	95
	Wild collection, other	14'700
Mauritius	Wild collection, no details	16'843
Mexico	Fruit, wild collection	2'339
	Medicinal and aromatic plants, wild	861
	Mushrooms, wild	0
	Nuts, wild collection	287

Country	Land use	Area [ha]
	Wild collection, no details	1'850'166
Moldova	Fruit, wild collection	133
	Nuts, wild collection	1'595
Morocco	Fruit, wild collection	4'367
	Medicinal and aromatic plants, wild	250
	Oil plants, wild collection	31'692
	Wild collection, no details	297'177
	Wild collection, other	1'820
Mozambique	Wild collection, other	1'800'030
Namibia	Marula, wild collection	110
	Medicinal and aromatic plants, wild	2'598'662
Nepal	Wild collection, no details	24'422
North Macedonia	Medicinal and aromatic plants, wild	556'600
Peru	Nuts, wild collection	217'004
Russian Federation	Nuts, wild collection	121
	Wild collection, no details	220'917
Senegal	Nuts, wild collection	
	Permanent crops, other	20'240
	Wild collection, other	120
Seychelles	Medicinal and aromatic plants, wild	1'223
Somalia	Medicinal and aromatic plants, wild	1'000
	Wild collection, no details	99'034
	Wild collection, other	840'000
South Africa	Marula, wild collection	8'735
	Medicinal and aromatic plants, wild	417'405
	Rose hips, wild collection	424'675
	Wild collection, other	9'000
Sudan	Wild collection, other	98'044
Tanzania, United Republic of	Wild collection, other	2'597
Thailand	Wild collection, no details	90'716
Togo	Wild collection, other	
Turkey	Berries, wild collection	95
	Medicinal and aromatic plants, wild	9'796
	Nuts, wild collection	23'392
Ukraine	Forest products	0
	Medicinal and aromatic plants, wild	100
	Wild collection, no details	591'289
	Wild collection, other	0
United States of America	Berries, wild collection	596
Viet Nam	Wild collection, no details	12'450
Zambia	Bee pastures	2'500'000
	Fruit, wild collection	700'000
Zimbabwe	Marula, wild collection	75'000
	Medicinal and aromatic plants, wild	118'400
	Nuts, wild collection	20'000
	Wild collection, other	50'150
World		**28'526'883**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Beehives

There were almost 2.7 million organic beehives in 2020, representing more than 2.9 percent of the world's beehives.[1] Organic beehives are concentrated in Europe (41 percent) and Latin America (34 percent) (Figure 26). The country with the largest number of organic beehives was Brazil (approximately 630'000), followed by Zambia (370'000) and Bulgaria (264'000). The total number has increased five-fold since 2007 when over 535'000 beehives were reported.

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.

World: Distribution of organic beehives by region in 2020

Source: FiBL survey 2022

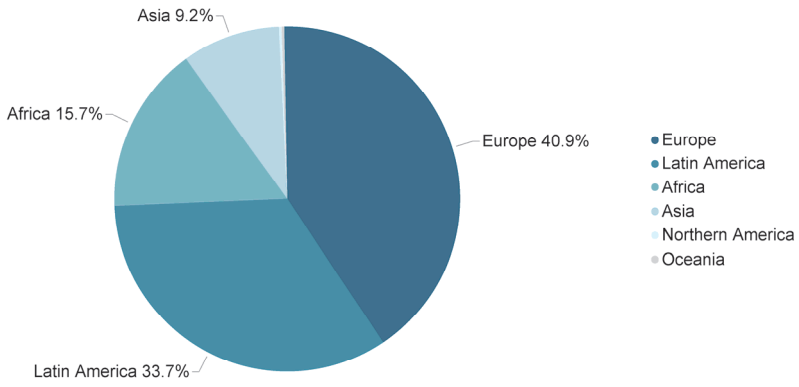


Figure 26: World: Distribution of organic beehives by region in 2020

Source: FiBL survey 2022, based on data from government bodies, the private sector, and certifiers. For detailed data sources, see annex, page 322

[1] According to FAO, there were 90'548'801 beehives in 2020. The FAOSTAT website > Production > Live animals at http://www.fao.org/faostat/en/#data/QA

Table 22: Number of organic beehives by country 2020

Country	Beehives [no.]
Argentina	28'127
Armenia	1'687
Australia	6'475
Austria	22'192
Belarus	3'200
Belgium	22
Bhutan	177
Bosnia and Herzegovina	150
Brazil	629'939
Bulgaria	264'069
Burkina Faso	11
Canada	6'639
Chile	24'425
China	229'084
Croatia	2'367
Cyprus	184
Czech Republic	639
Denmark	631
Dominican Republic	9'804
Estonia	2'899
Finland	6'190
France	122'647
Georgia	570
Germany	35'000
Guadeloupe (France)	70
Guatemala	8'352
Iran (Islamic Republic of)	4'640
Iraq	1'900
Italy	171'094
Kosovo	40
Latvia	23'541
Lebanon	562
Liechtenstein	173
Lithuania	1'092
Luxembourg	116
Madagascar	47'798
Mexico	152'459
Moldova	7'200
Montenegro	3'381
Morocco	1'242
Nicaragua	20'985
North Macedonia	9'829
Norway	1'861
Portugal	48'604
Réunion (France)	1'031
Romania	170'789
Russian Federation	37
Saudi Arabia	6'003
Serbia	12'618
Slovakia	251
Slovenia	1'814
Spain	81'650
Sweden	2'182
Switzerland	5'135
Tunisia	583
Turkey	89'128
Ukraine	300
Uruguay	24'297
Zambia	368'274
World	**2'666'159**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

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 more than 306'000 metric tons of organic aquaculture was reported in 2020. According to the available data, aquaculture production is concentrated in Asia (55 percent mainly China) and Europe (31 percent). The largest production volume was found in China (169'400 metric tons), followed by Ecuador (almost 43'000 metric tons) and Ireland (more than 30'000 metric tons) (Table 24 and Figure 27).

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.

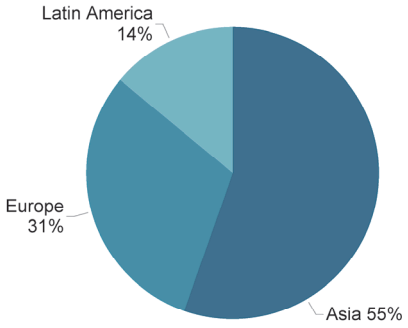
A breakdown by species was available for one-fourth of the total production. According to the available data, organic salmon is the most produced species (over 25'500 metric tons), followed by mussels (25'400 metric tons) and sturgeon (over 2'500 metric tons).

Table 23: Organic aquaculture: Production volume by species 2020

Main species	Production [MT]
Aquaculture, no details	241'112
Salmon	25'546
Mussels	25'419
Shrimps	7'382
Sturgeon	2'520
Rainbow trout	1'821
Carps	761
Trout	643
Aquatic plants	611
Sea bass	310
Seabream	269
Bream	54
Bass	44
Oysters	37
Total	**306'528**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

World: Organic aquaculture production volume: Distribution by continent 2020
Source: FiBL survey 2022



World: The ten countries with the largest aquaculture production volume 2020
Source: FiBL survey 2022

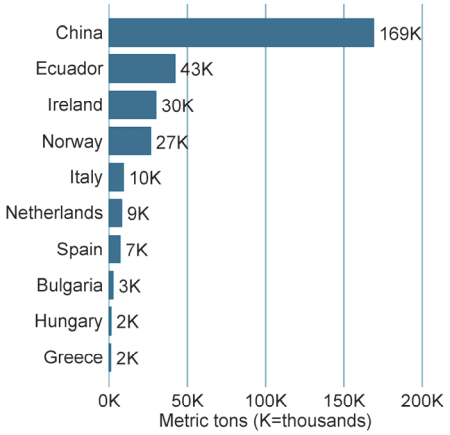
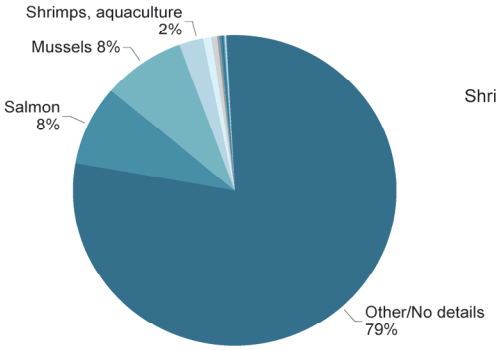


Figure 27: World: Organic aquaculture production volume: Distribution by continent and top 10 countries 2020

Source: FiBL-survey 2022; based on national data sources and certifier data. For detailed data sources, see annex, page 322

World: Organic aquaculture production volume: Distribution by species 2020
Source: FiBL survey 2022



World: Key organic aquaculture species by production of volume 2020
Source: FiBL survey 2022

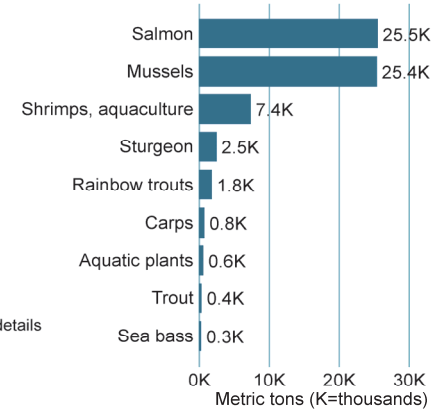


Figure 28: World: Organic aquaculture production volume: Distribution by species and key species 2020

Source: FiBL-survey 2022; based on national data sources and certifier data. For detailed data sources, see annex, page 322

Table 24: Organic aquaculture: Production volume by country 2020

Country	Production [MT]
Bangladesh	342
Bulgaria	3'004
China	169'400
Croatia	280
Ecuador	42'688
Greece	1'574
Hungary	1'743
Iceland	5
Ireland	30'430
Italy	9'608
Latvia	8
Lithuania	955
Netherlands	8'536
Norway	26'999
Poland	282
Portugal	1'100
Romania	975
Slovenia	713
Spain	7'476
Switzerland	370
Viet Nam	40

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

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 terms 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 2019 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 2020 (overview including conversion areas)

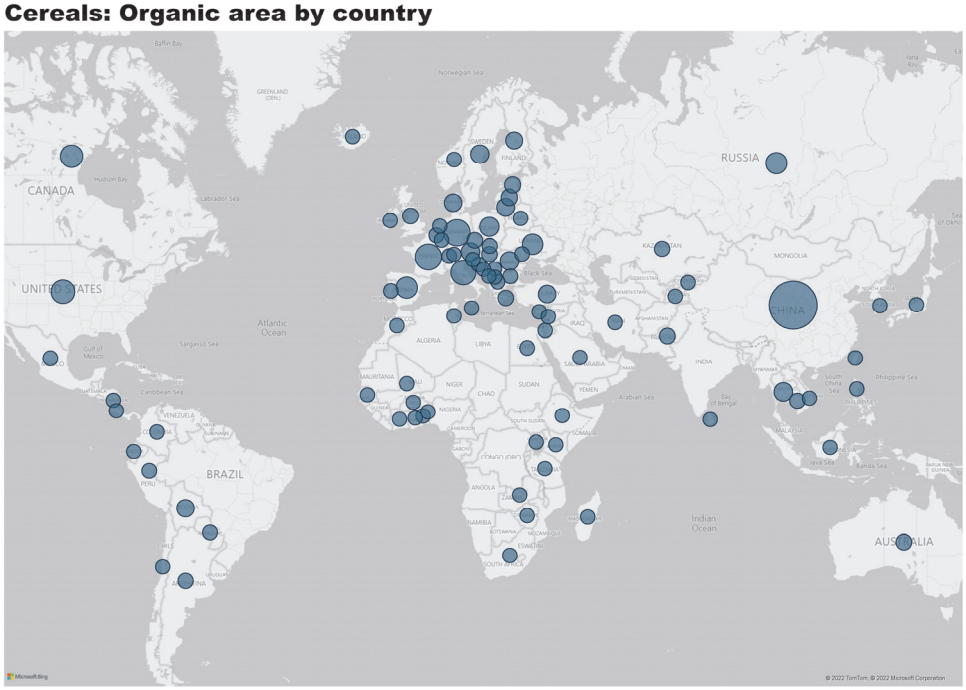
Crop	Africa [ha]	Asia [ha]	Europe [ha]	Latin America [ha]	North America [ha]	Oceania [ha]	Total [ha]
Cereals	17'359	1'299'939	3'027'517	159'516	542'879	41'293	5'088'503
Citrus fruit	6'898	15'960	60'864	51'713	5'403		140'837
Cocoa	215'652	357		166'564		1'935	384'507
Coffee	254'221	70'998		351'371	115	68'238	744'942
Dry pulses	3'931	79'628	572'233	11'120	81'432		748'345
Fruit temperate	4'403	71'272	154'046	8'466	18'130		256'317
Fruit, tropical/ subtropical	69'038	62'067	43'468	112'765	5'122	76	292'535
Grapes	4'291	15'020	431'225	14'682	27'444	5'783	498'445
Oilseeds	184'769	577'955	821'708	76'007	134'704		1'795'143
Olives	260'207	6'584	621'470	6'100	628		894'989
Vegetables	37'980	52'199	212'563	33'245	81'542	4'035	421'563

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

› Cereals

In 2020, 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

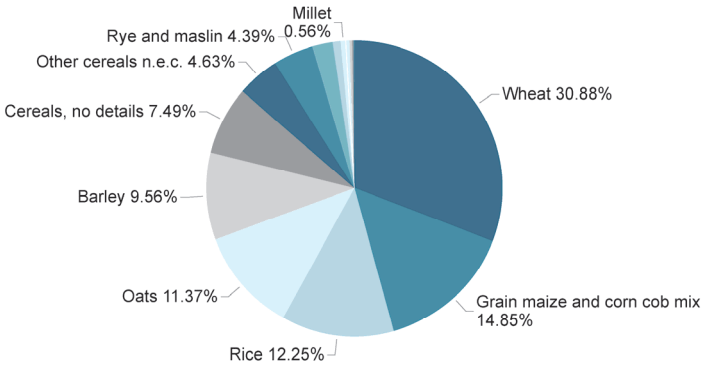


Figure 29: Cereals: Organic area 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments.

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

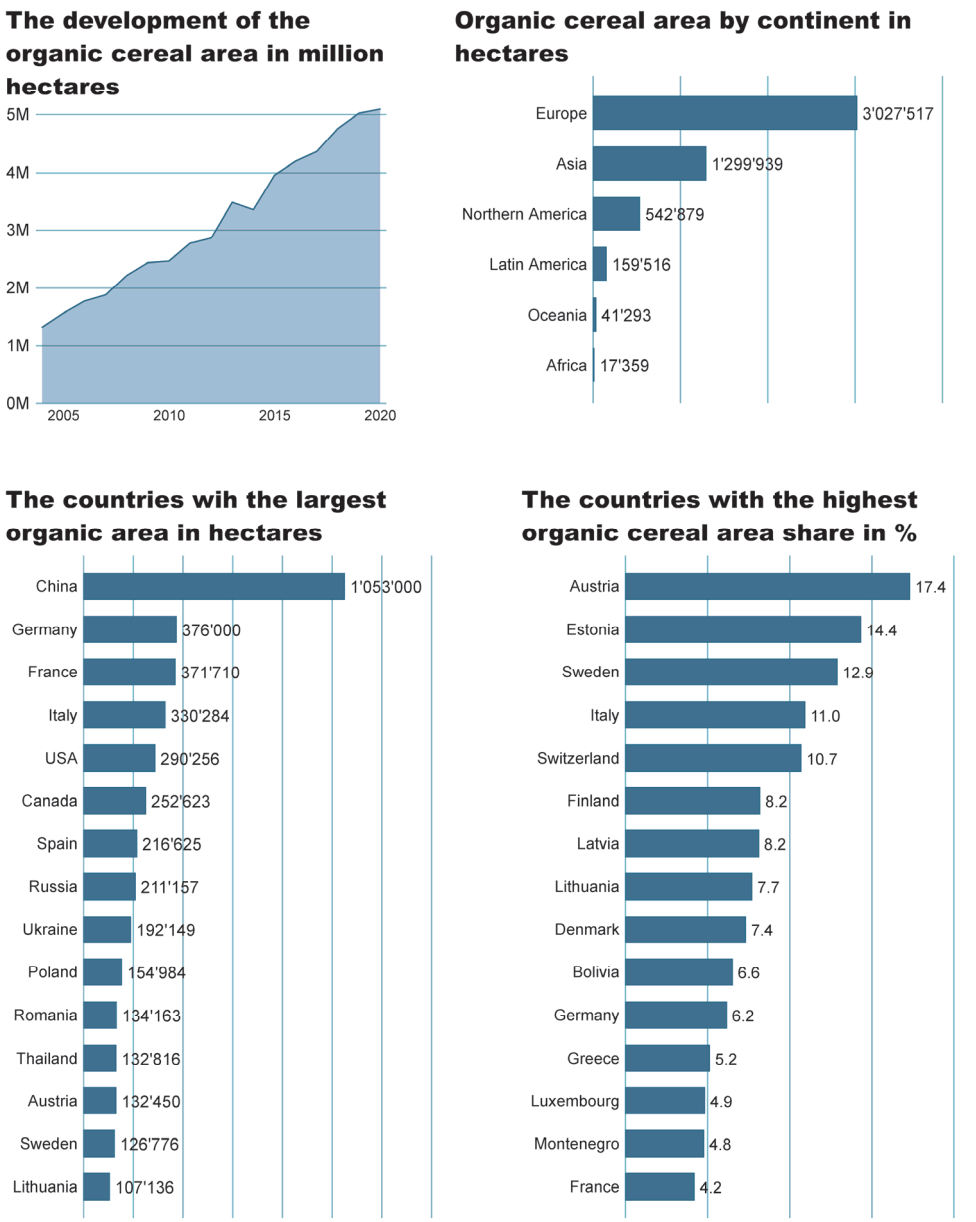


Figure 30: Cereals: Organic area 2020

Source: FiBL survey 2022, 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 2020

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	23'873	0.15		
Australia	41'293	0.25	41'293	
Austria	132'450	17.35		
Belarus	514	0.02	473	41
Belgium	12'199	4.01	8'944	3'255
Benin	15	0.00	15	
Bolivia	94'012	6.55	6'102	87'910
Bosnia and Herzegovina	138	0.04	138	
Bulgaria	15'550	0.77	14'405	1'145
Burkina Faso	167	0.00	167	
Cambodia	31'136	0.95	31'136	
Canada	252'623	1.65		
Chile	487	0.11	487	
China	1'053'000	1.08	789'000	264'000
Colombia	309	0.03	309	
Costa Rica	64	0.18	64	
Côte d'Ivoire	58	0.00	58	
Croatia	14'125	2.64	12'185	1'939
Cyprus	788	2.46	661	126
Czech Republic	39'818	2.96	33'878	5'941
Congo D.R.	880	0.02	880	
Denmark	99'829	7.35	76'563	23'268
Ecuador	949	0.16	692	257
Egypt	8'804	0.26	8'804	
Estonia	53'125	14.37	48'569	4'556
Ethiopia	50	0.00		
Finland	78'654	8.22	78'654	
France	371'710	4.23	245'898	125'812
Germany	376'000	6.20		
Ghana	93	0.00	93	
Greece	38'108	5.16	27'509	10'599
Hungary	38'298	1.62	30'295	8'003
Iceland	51	0.00	51	
Indonesia	301	0.00	301	
Iran	522	0.00	510	12
Ireland	2'511	0.95	2'005	507
Israel	979	1.93	889	90
Italy	330'284	10.97	268'177	62'110
Japan	3'063	0.16	3'063	
Kazakhstan	29'053	0.19		
Kenya	272	0.01	272	
Kosovo	119	0.00	119	
Kyrgyzstan	1'588	0.28		
Latvia	60'865	8.15	56'348	4'518
Lebanon	50	0.09	50	
Liechtenstein	90	0.00	84	6
Lithuania	107'136	7.74	101'488	5'648
Luxembourg	1'231	4.86	1'069	162
Madagascar	22	0.00	22	
Mali	310	0.01	310	
Malta	5	0.00	4	1
Mexico	9'950	0.11	9'950	
Moldova	11'607	1.28	8'098	3'509
Montenegro	105	4.81	79	26
Morocco	104	0.00	91	13
Netherlands	4'282	2.47	3'886	395

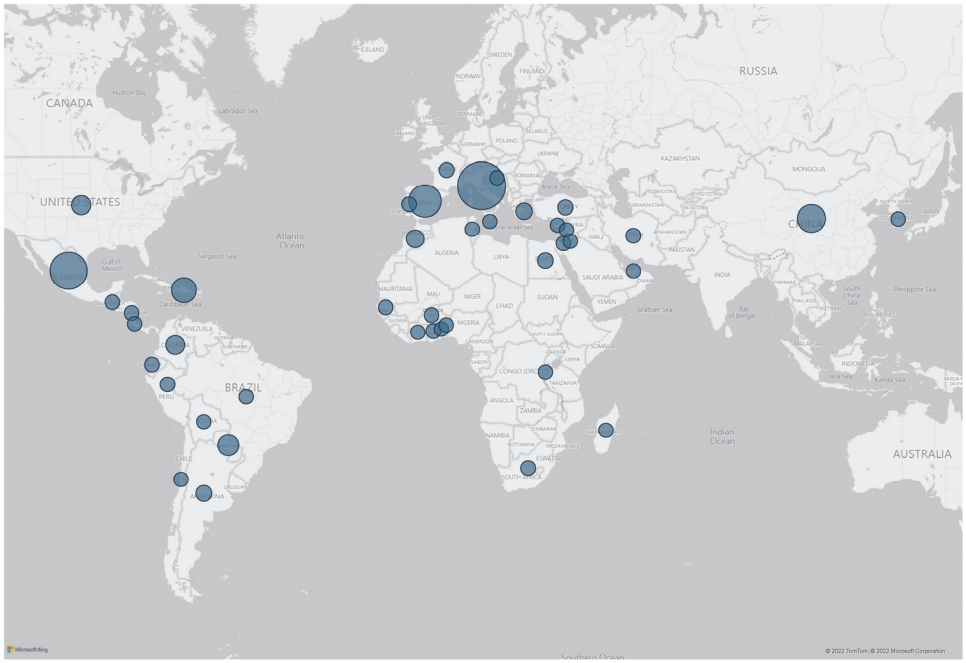
Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Nicaragua	632	0.15	463	169
North Macedonia	1'418	0.89	877	540
Norway	6'427	2.35	5'783	644
Pakistan	38'719	0.28	38'581	138
Palestine	77	0.33	77	
Paraguay	11'786	0.67	11'786	
Peru	17'455	1.43	11'122	6'332
Philippines	76	0.00	76	
Poland	154'984	2.24	117'875	37'109
Portugal	4'889	2.27	4'371	517
Republic of Korea	1'686	0.21		
Romania	134'163	2.39	96'238	37'926
Russian Federation	211'157	0.49		
Saudi Arabia	731	0.30	731	
Senegal	340	0.02	340	
Serbia	3'581	0.21	2'227	1'353
Slovakia	23'211	3.05	19'623	3'587
Slovenia	2'568	2.53	2'261	307
South Africa	2'565	0.08	2'425	140
Spain	216'625	3.57	194'146	22'479
Sri Lanka	65	0.01	65	0
Sweden	126'776	12.93	111'079	15'697
Switzerland	15'261	10.73		
Taiwan	3'289	1.08	3'289	
Tajikistan	1'149	0.31		
Tanzania, United Republic of	100	0.00	100	
Thailand	132'816	1.21		
Togo	1'252	0.10	1'252	
Tunisia	1'185	0.09	1'185	
Turkey	101'916	0.95	72'665	29'251
Uganda	749	0.04		
Ukraine	192'149	1.29	137'415	17'785
United Kingdom	42'800	0.00	39'000	3'600
United States of America	290'256	0.55	290'256	
Viet Nam	1'640	0.02	1'263	377
Zambia	365	0.04	365	
Zimbabwe	29	0.00	29	
World	**5'088'503**	**0.71**	**3'081'099**	**791'801**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322
Blank cells: No data available

› Citrus fruit

In 2020, over 140'000 hectares or 1.4 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

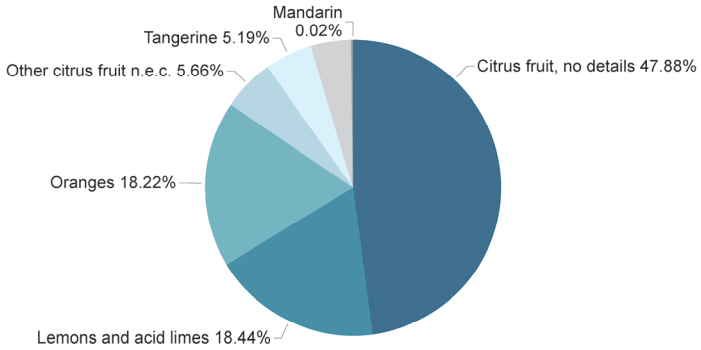
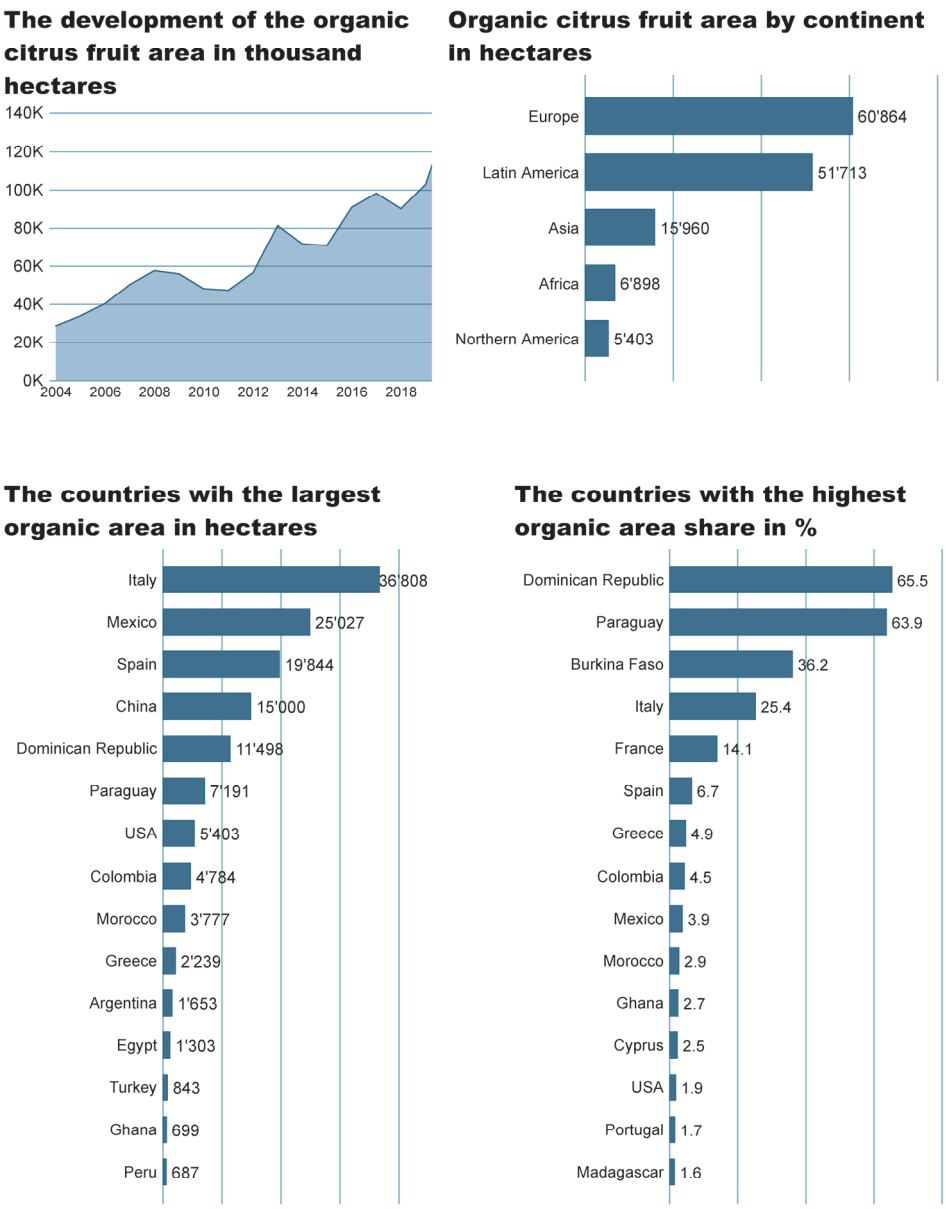


Figure 31: Citrus fruit: Organic area 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments.

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



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Figure 32: Citrus fruit: Organic area 2020

Source: FiBL survey 2022, 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 2020

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	1'653	1.2		
Benin	1	0.0	1	
Bolivia	2	0.0	2	
Brazil	159	0.0	159	
Burkina Faso	88	36.2	88	
Chile	36	0.2	36	
China	15'000	0.5	7'000	8'000
Colombia	4'784	4.5	4'770	14
Costa Rica	10	0.0	10	
Côte d'Ivoire	7	0.1	7	
Croatia	19	0.9	11	8
Cyprus	75	2.5	61	13
Dominican Republic	11'498	65.5	11'498	
Ecuador	390	1.0	379	10
Egypt	1'303	0.7	1'303	
France	661	14.1	409	252
Ghana	699	2.7	699	
Greece	2'239	4.9	1'199	1'040
Guatemala	224	0.9	224	
Iran	583	0.4	4	579
Israel	282	1.3	255	29
Italy	36'808	25.4	31'813	4'995
Jordan	13	0.2		
Lebanon	22	0.2	19	3
Madagascar	252	1.6	252	
Malta	1	0.0		
Mexico	25'027	3.9	25'027	
Morocco	3'777	2.9	3'294	483
Nicaragua	53	0.2		53
Palestine	1	0.1	1	
Paraguay	7'191	63.9	7'191	
Peru	687	1.0	211	476
Portugal	374	1.7	307	67
Republic of Korea	60	0.3		
Senegal	1	0.0	1	
South Africa	599	0.7	550	49
Spain	19'844	6.7	12'098	7'746
Togo	3	0.1	3	
Tunisia	167	0.4	167	
Turkey	843	0.5	463	380
USA	5'403	1.9	5'403	
World	**140'837**	**1.4**	**114'914**	**24'198**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322. Blank cells: No data available.

› Cocoa beans

In 2020, almost 385'000 hectares or 3.1 percent of the global cocoa area was under organic management.

Cocoa: Organic area by country

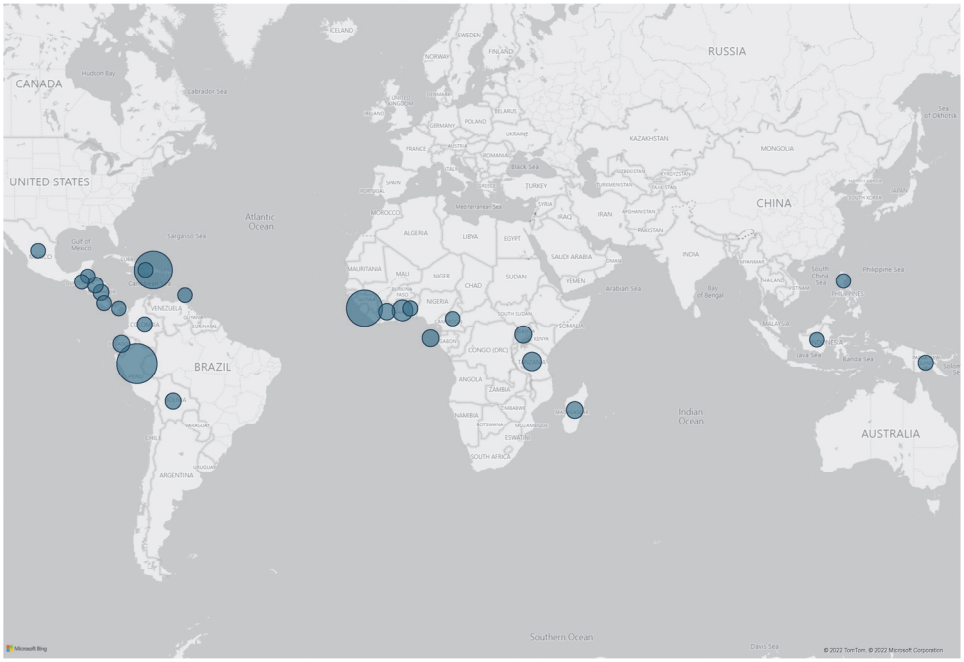


Figure 33: Cocoa: Organic area 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments.

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

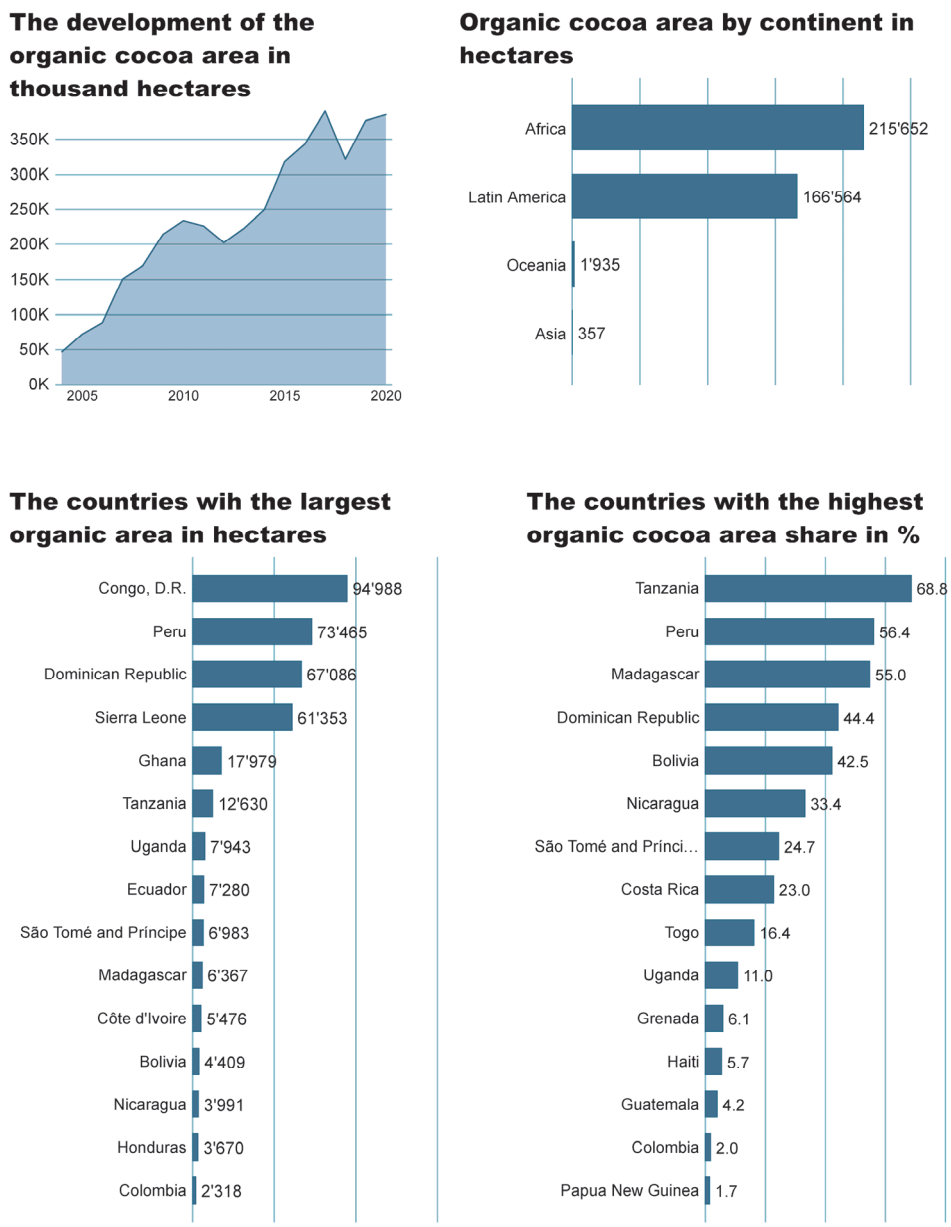


Figure 34: Cocoa: Organic area 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments.

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

Table 28: Cocoa: Organic area by country 2020

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Belize	454			
Bolivia	4'409	42.4	3'611	798
Cameroon	292	0.0		
Colombia	2'318	2.0	2'303	15
Costa Rica	924	23.0	924	
Côte d'Ivoire	5'476	0.1	5'468	9
Congo D.R.	94'988	0.0	94'988	
Dominican Republic	67'086	44.4	54'213	12'873
Ecuador	7'280	1.4	6'548	732
Ghana	17'979	1.2	16'695	1'284
Grenada	84	6.1		
Guatemala	194	4.2	194	
Haiti	1'955	5.6	1'955	
Honduras	3'670	0.0	2'810	860
Indonesia	310	0.0	310	
Madagascar	6'367	55.0	6'367	
Mexico	689	1.2	689	
Nicaragua	3'991	33.4	3'066	925
Panama	44	0.5	44	
Papua New Guinea	1'935	1.7		
Peru	73'465	56.3	52'192	21'273
Philippines	47	0.2	47	
Sao Tome and Principe	6'983	24.7	6'571	
Sierra Leone	61'353	0.0	61'353	
Tanzania	12'630	68.8	12'630	
Togo	1'640	16.4	1'631	9
Uganda	7'943	11.0		
World	**384'507**	**3.1**	**334'609**	**38'778**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322
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 2021."[1]

[1] Claudia Meier, Gregory Sampson, Cristina Larrea, Bernhard Schlatter, Steffany Bermudez, Tuan Duc Dang and Helga Willer (Eds.), The State of Sustainable Markets 2021: 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 2020, around 745'000 hectares or 6.7 percent of the global coffee area was under organic management.

Coffee: Organic area by country

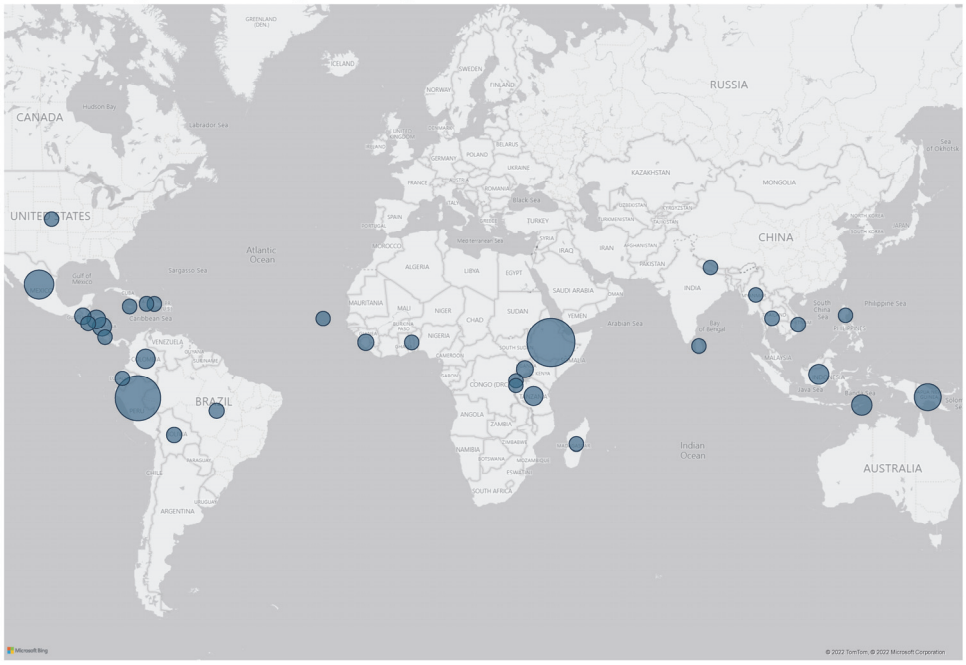


Figure 35: Coffee: Organic area 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments.

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

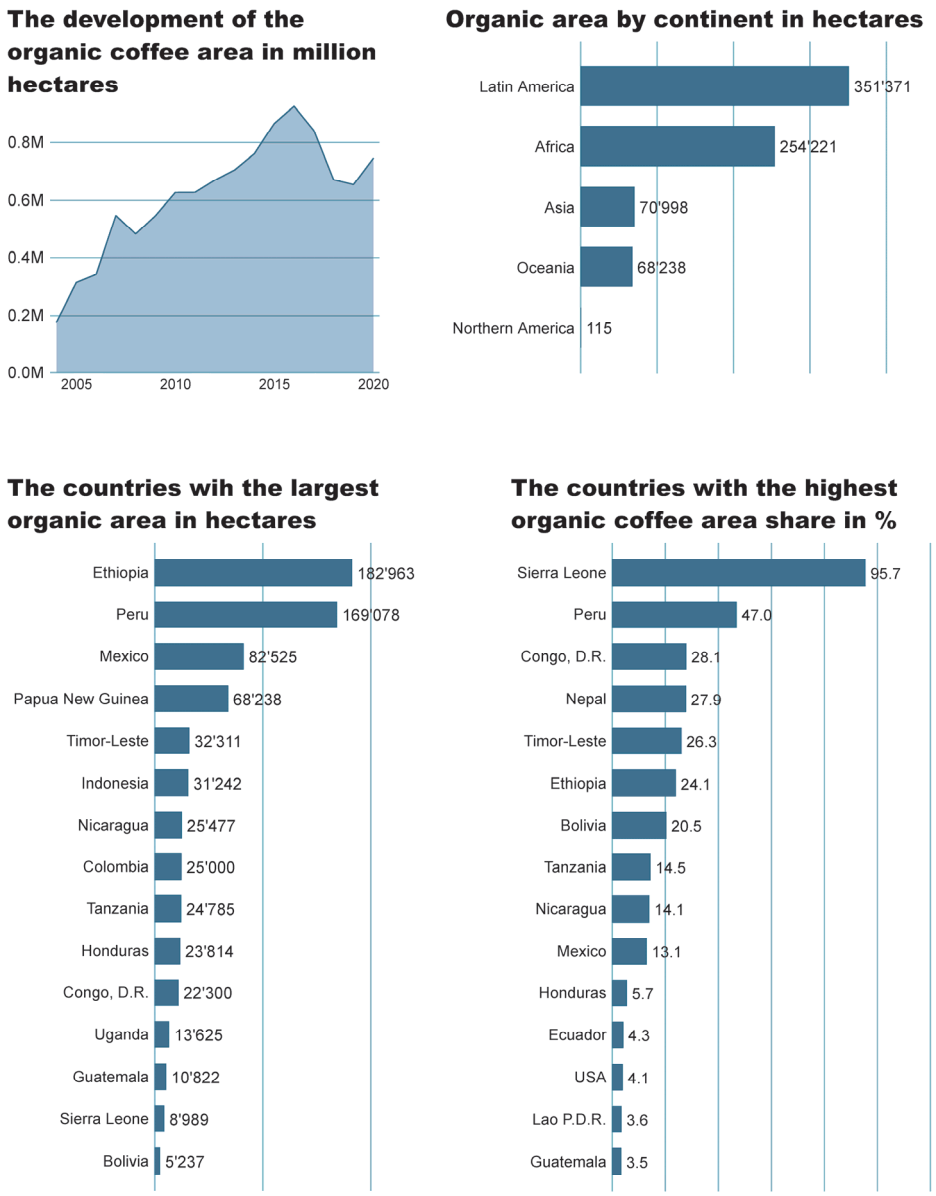


Figure 36: Coffee: Organic area 2020

Source: FiBL survey 2022, 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 2020

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Bolivia	5'237	20.5	5'095	142
Brazil	4'500	0.2		
Burundi	47	0.3		47
Cape Verde	3	0.0		
Colombia	25'000	2.9	25'000	
Costa Rica	627	0.7	627	
Congo D.R.	22'300	28.1	22'300	
Dominican Republic	198	0.3	198	
Ecuador	1'543	4.3	1'125	417
El Salvador	2'371	1.5	2'271	100
Ethiopia	182'963	24.1		
Guatemala	10'822	3.5	10'822	
Haiti	169	0.4	169	
Honduras	23'814	5.7	7'283	12
Indonesia	31'242	2.5	31'002	240
Jamaica	10	0.1		
Lao P.D.R.	3'169	3.6		
Madagascar	660	0.6	660	
Mexico	82'525	13.1	82'525	
Myanmar	67	0.5	67	
Nepal	804	27.9	804	
Nicaragua	25'477	14.1	21'052	4'426
Papua New Guinea	68'238			
Peru	169'078	47.0	124'132	44'945
Philippines	4	0.0	4	
Rwanda	738	3.4	738	0
Sierra Leone	8'989	95.7	8'989	
Sri Lanka	3	0.0	3	
Tanzania	24'785	14.5	24'687	98
Thailand	1'279	3.5		
Timor-Leste	32'311	26.3	32'311	
Togo	111	0.3	111	
Uganda	13'625	2.9		
United States of America	115	4.1	115	
Viet Nam	2'120	0.3	420	1'700
World	**744'942**	**6.7**	**402'509**	**52'128**

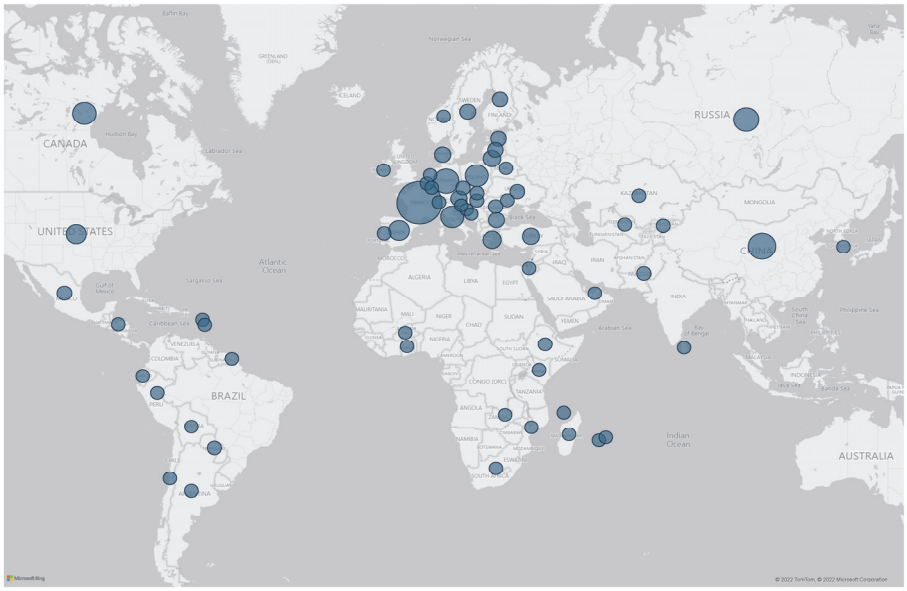
Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322
Blank cells: No data available. For more information on coffee production (organic and other Voluntary Sustainability Standards - VSS), please see the report "The State of Sustainable Markets – Statistics and Emerging Trends 2021."

Claudia Meier, Gregory Sampson, Cristina Larrea, Bernhard Schlatter, Steffany Bermudez, Tuan Duc Dang and Helga Willer (Eds.), The State of Sustainable Markets 2021: 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 2020, around 748'000 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

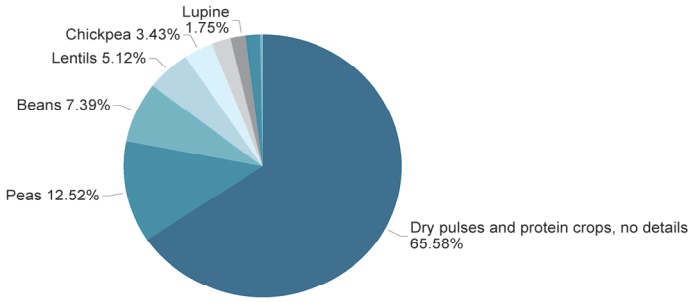


Figure 37: Dry Pulses: Organic area 2020

Source: FiBL survey 2022, 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."

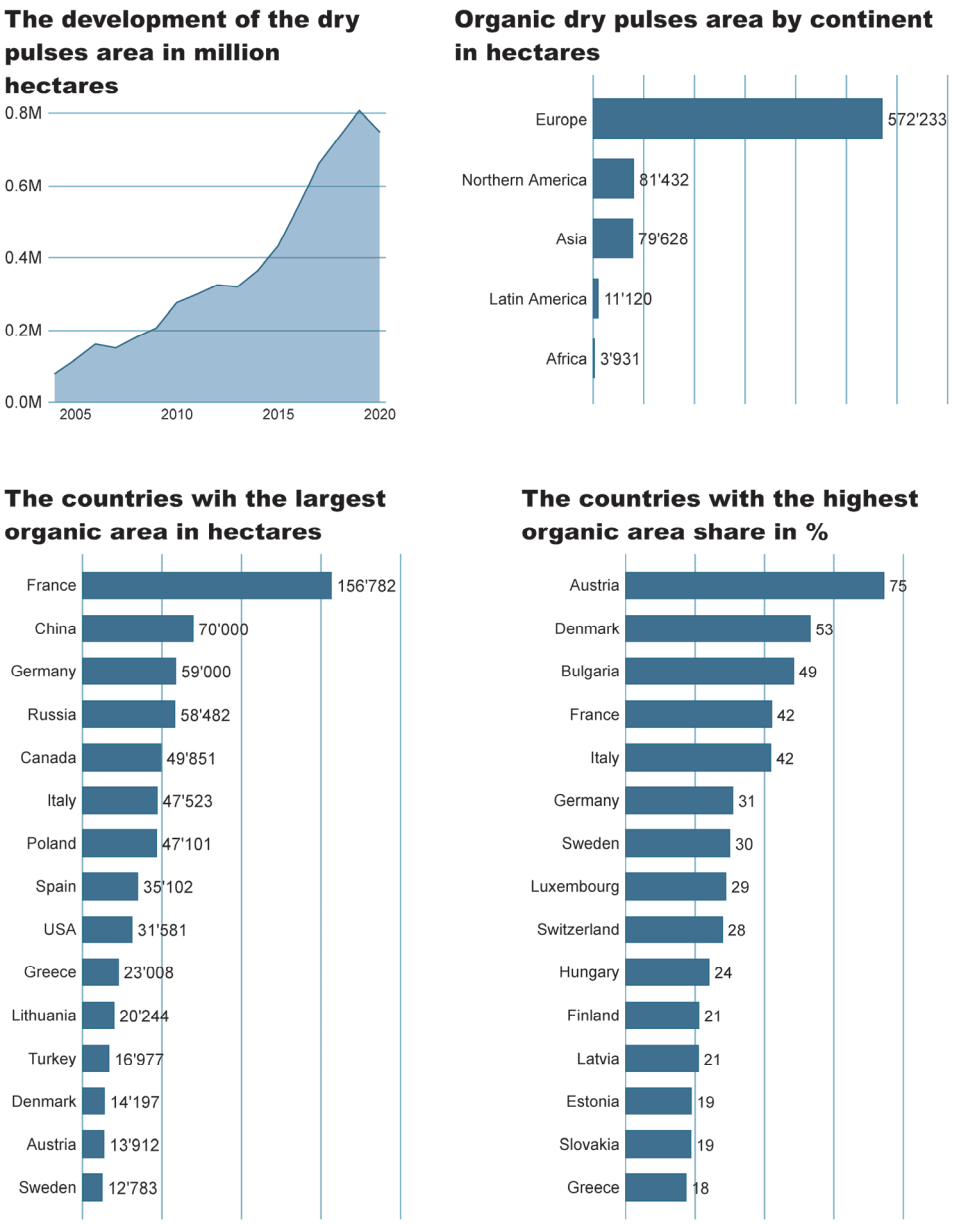


Figure 38: Dry Pulses: Organic area 2020

Source: FiBL survey 2022 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 2020

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Argentina	906	0.2		
Austria	13'912	74.6		
Belarus	71	0.0	65	6
Belgium	384	6.4	326	58
Bolivia	80	0.1	80	
Bosnia and Herzegovina	24	0.2	24	
Bulgaria	12'245	48.6	11'038	1'208
Burkina Faso	168	0.0	168	
Canada	49'851	1.4		
Chile	1	0.0	1	
China	70'000	2.6	60'000	10'000
Croatia	113	5.9	90	23
Czech Republic	4'395	11.8	3'441	954
Denmark	14'197	53.4	9'825	4'372
Ecuador	18	0.1	16	2
Estonia	9'477	19.1	8'069	1'408
Ethiopia	2'670	0.2		
Finland	8'715	21.3	8'715	
France	156'782	42.3	117'288	39'494
French Guiana (France)	115	0.0	74	42
Germany	59'000	31.0		
Ghana	29	0.0	29	
Greece	23'008	17.6	15'900	7'108
Guadeloupe (France)	83	0.0	62	20
Honduras	52	0.0	52	
Hungary	2'953	24.2	2'522	431
Ireland	101	0.7	78	24
Israel	23	0.4	23	
Italy	47'523	42.0	39'653	7'869
Kazakhstan	2'825	0.7		
Kenya	215	0.0	215	
Kyrgyzstan	1'650	1.4		
Latvia	9'255	21.2	8'552	703
Lithuania	20'244	15.1	19'343	901
Luxembourg	111	29.1	79	32
Madagascar	217	0.2	217	
Martinique (France)	72	0.0	58	14
Mayotte	44	0.0	44	1
Mexico	7'094	0.5	7'094	
Moldova	1'490	4.1	1'157	332
Mozambique	5	0.0	0	5
Netherlands	323	7.8	310	12
Norway	426	15.4	355	71
Pakistan	3'216	0.2	3'216	

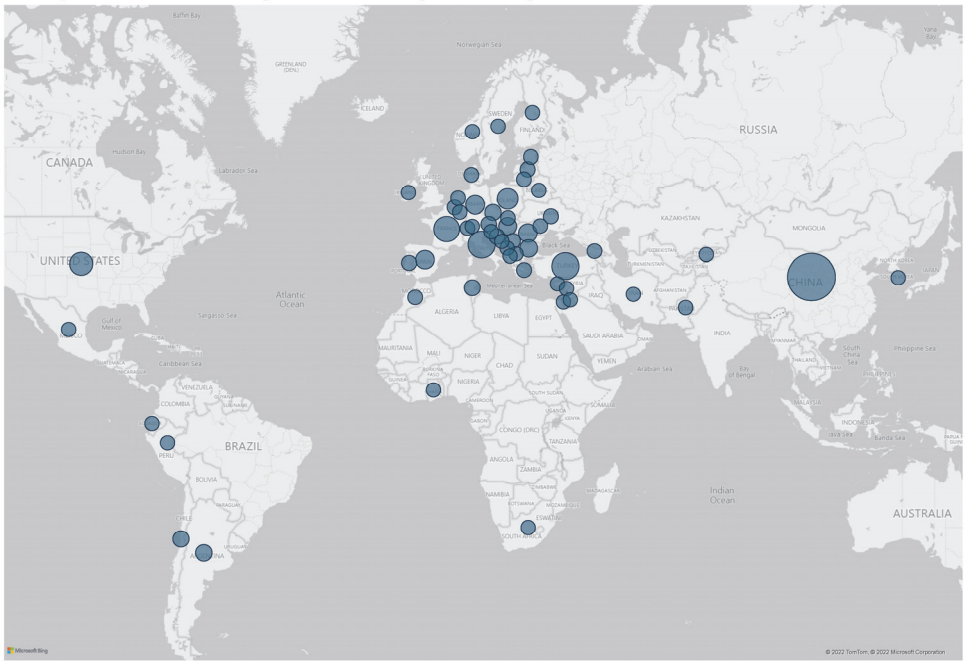
Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Paraguay	2'340	2.3	2'340	
Peru	360	0.2	183	177
Poland	47'101	15.0	34'944	12'157
Portugal	1'202	6.3	1'149	53
Republic of Korea	64	0.5		
Réunion (France)	267	0.0	250	17
Romania	5'710	5.3	4'173	1'537
Russian Federation	58'482	2.8		
Slovakia	2'263	19.0	1'682	581
Slovenia	66	6.7	59	7
South Africa	305	0.4	303	2
Spain	35'102	9.6	30'919	4'182
Sri Lanka	2	0.0	2	
Sweden	12'783	30.2	10'252	2'532
Switzerland	1'562	28.1		
Turkey	16'977	1.8	6'986	9'990
Ukraine	6'237	1.8		
United Arab Emirates	1	0.0	1	
United States of America	31'581	2.5	31'581	
Uzbekistan	1'848	8.2		
Zambia	10	0.0	10	
World	**748'345**	**0.8**	**443'014**	**106'325**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322
Blank cells: No data available

Temperate Fruit

In 2020, around 256'000 hectares or 2.2 percent of the global temperate fruit area was under organic management.

Temperate Fruit: Organic area by country



Temperate fruit: use of the organic temperate fruit area

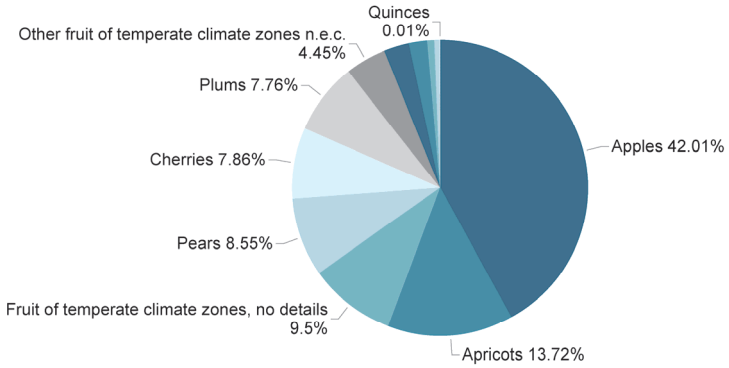


Figure 39: Temperate fruit: Organic area 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments.

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

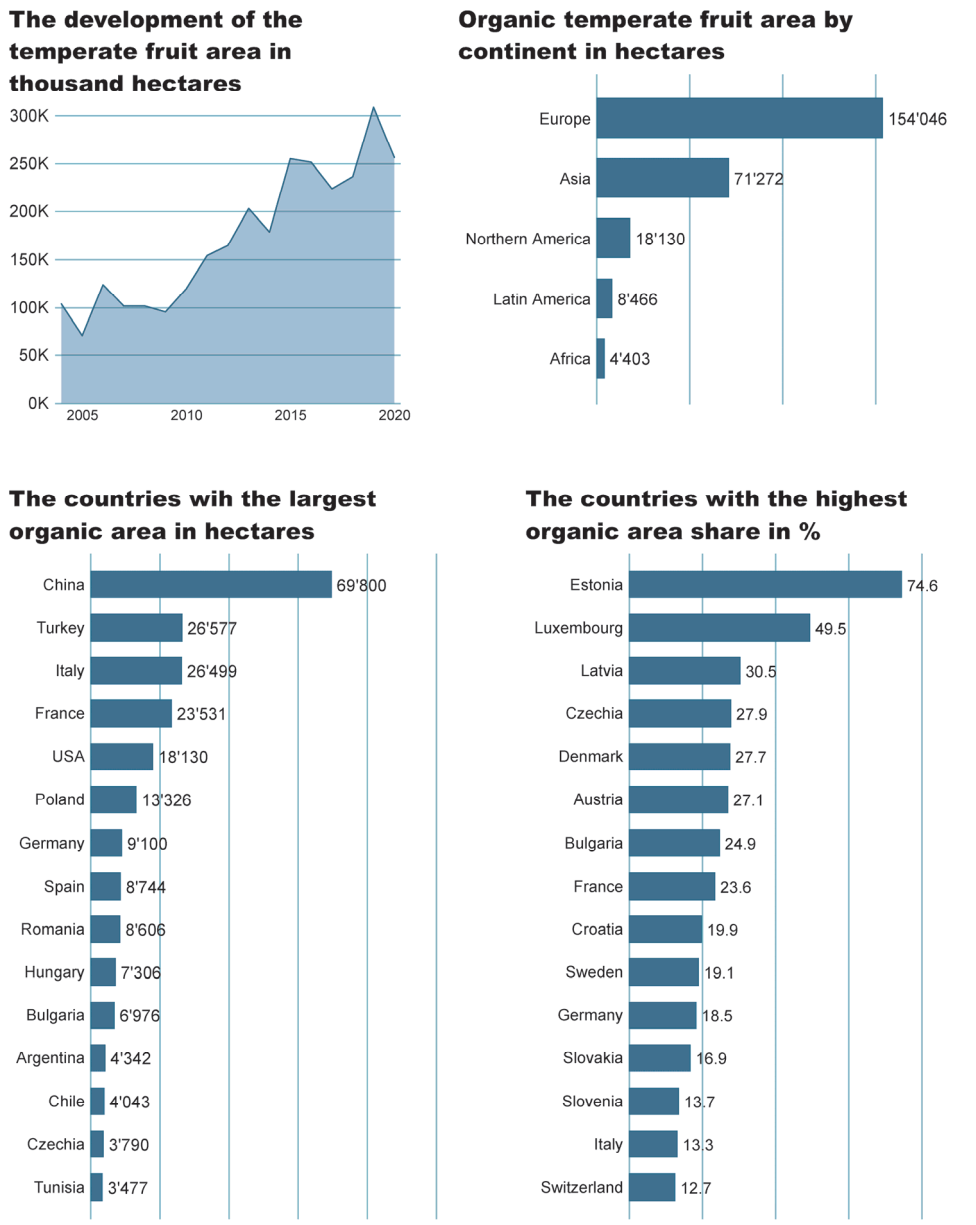


Figure 40: Temperate Fruit: Organic area 2020

Source: FiBL survey 2022, 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 2020

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	21	0.1		21
Argentina	4'342	5.0		
Austria	2'302	27.1		
Belarus	14	0.0	14	
Belgium	1'043	6.0	628	415
Bosnia and Herzegovina	2	0.0	2	0
Bulgaria	6'976	24.9	4'905	2'071
Chile	4'043	3.6	4'043	
China	69'800	1.2	51'400	18'400
Croatia	2'525	19.9	1'777	747
Cyprus	140	8.9	108	31
Czech Republic	3'790	27.9	3'449	341
Denmark	659	27.7	565	94
Estonia	485	74.6	445	39
Finland	69	9.6	69	
France	23'531	23.6	16'535	6'995
Georgia	855	3.4	855	
Germany	9'100	18.5		
Greece	1'244	1.2	905	341
Hungary	7'306	11.5	4'201	3'107
Iran (Islamic Republic of)	2	0.0	2	
Ireland	54	7.6	51	2
Israel	50	0.5	37	13
Italy	26'499	13.3	19'304	7'195
Kyrgyzstan	249	0.5		
Latvia	1'311	30.5	1'169	139
Lebanon	58	0.2	51	8
Liechtenstein	2	0.0	1	1
Lithuania	828	6.2	717	111
Luxembourg	64	49.5	64	
Mexico	79	0.1	79	
Moldova	619	0.7	581	38
Montenegro	137	10.2	87	50
Morocco	911	0.9	718	193
Netherlands	608	3.5	517	92
North Macedonia	268	0.8	148	121
Norway	229	10.6	182	46
Pakistan	128	0.1	128	0
Peru	1	0.0	1	
Poland	13'326	6.5	10'003	3'324
Portugal	1'419	3.6	1'193	228
Republic of Korea	130	0.2		
Romania	8'606	6.5	5'166	3'441
Serbia	2'002	1.4	1'403	597

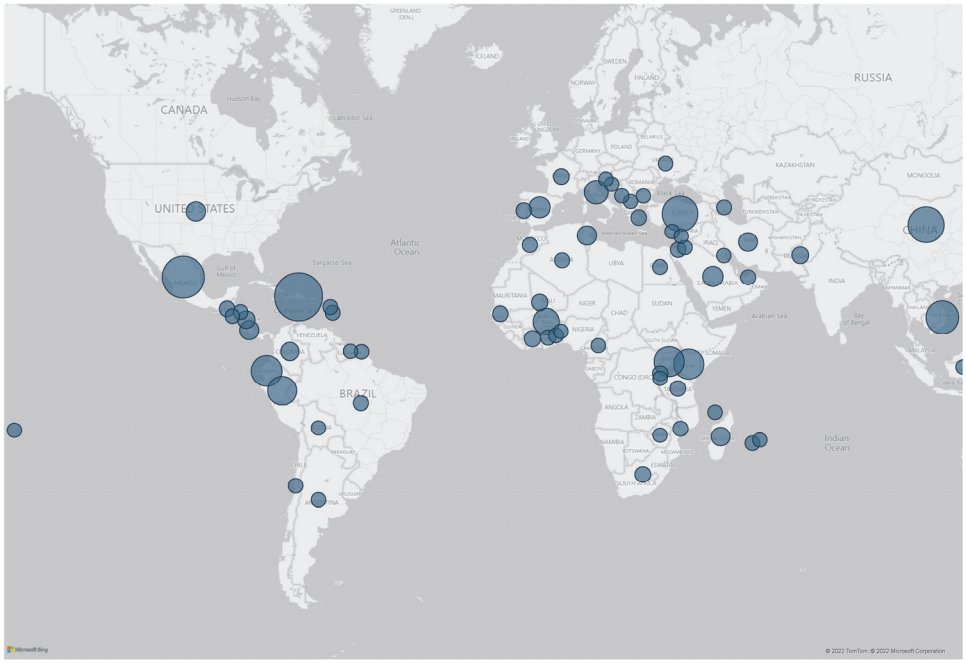
Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Slovakia	534	16.8	475	59
Slovenia	412	13.7	366	45
South Africa	15	0.0	14	0
Spain	8'744	4.7	5'936	2'808
Sweden	313	19.1	264	47
Switzerland	885	12.7		
Tunisia	3'477	7.1	3'477	
Turkey	26'577	5.2	20'268	6'311
Ukraine	1'400	0.9		
United States of America	18'130	7.2	18'130	
World	**256'317**	**2.2**	**180'435**	**57'472**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322
Blank cells: No data available.

› Fruit: Tropical and subtropical fruit

In 2020, around 292'000 hectares or 1.0 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

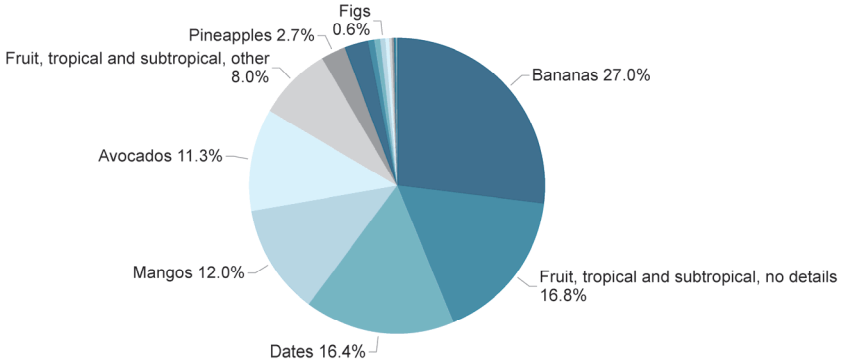


Figure 41: Tropical and subtropical fruit: Organic area 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments.

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

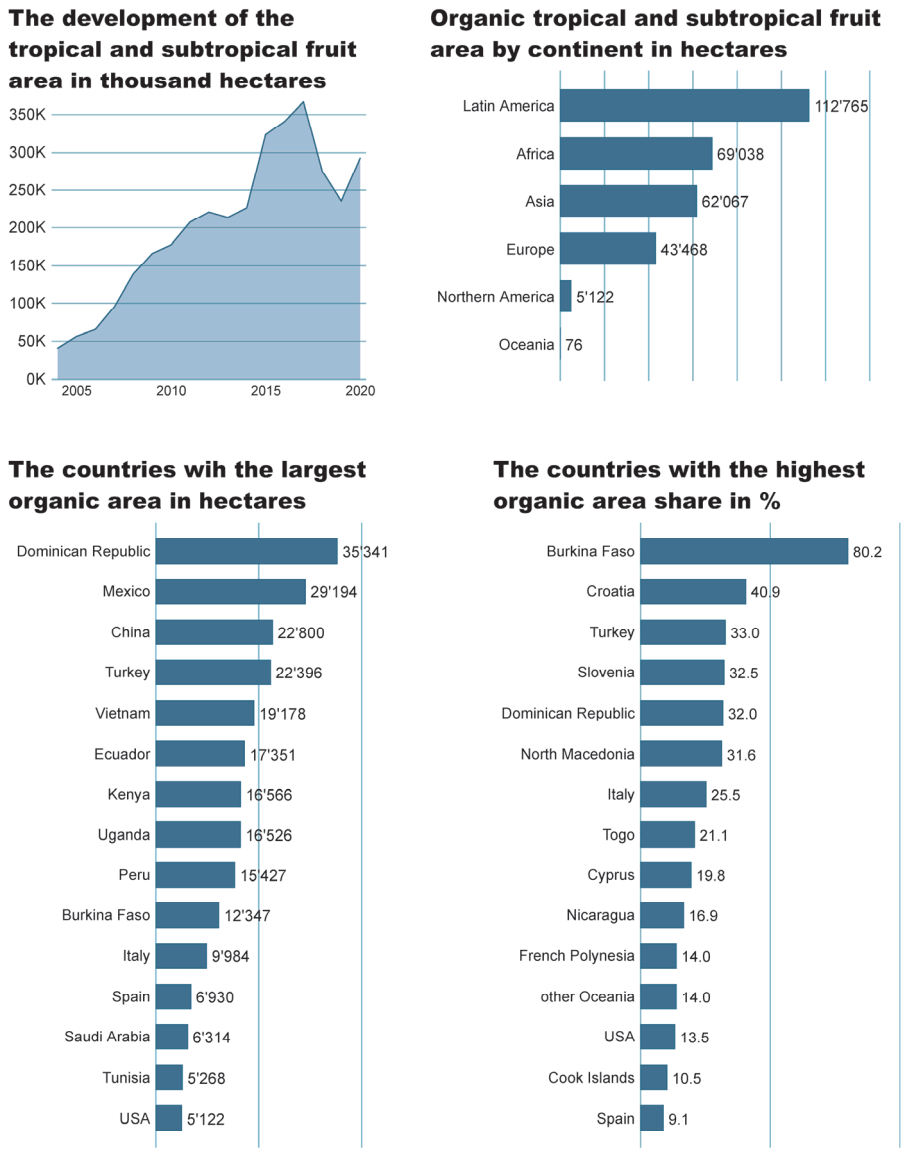


Figure 42: Tropical and subtropical fruit: Organic area 2020

Source: FiBL survey 2022, 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 2020

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Algeria	564	0.3	564	
Argentina	76	0.8		
Azerbaijan	450	3.5		
Benin	7	0.0	7	
Bolivia	2	0.0	2	
Brazil	662	0.1	662	
Bulgaria	42		37	5
Burkina Faso	12'347	80.2	12'339	8
Burundi	98	0.0	98	
Cameroon	46	0.0		
Chile	306	0.8	306	
China	22'800	0.4	13'600	9'200
Colombia	3'974	0.7	3'236	738
Cook Islands	15	10.5	15	
Costa Rica	5'042	4.8	5'042	
Côte d'Ivoire	2'052	0.3	2'033	19
Croatia	233	40.9	52	181
Cyprus	168	19.8	130	38
Dominican Republic	35'341	32.0	34'415	926
Ecuador	17'351	4.9	15'099	2'252
Egypt	542	0.2	542	
El Salvador	25	0.3	25	
France	1'348	6.9	866	482
French Guiana (France)	328	0.0	259	68
French Polynesia	61	14.0	61	
Ghana	996	0.2	996	
Greece	1'199	7.2	745	454
Guadeloupe (France)	254	0.0	114	140
Guatemala	973	0.7	973	
Honduras	170	0.7	170	
Indonesia	19	0.0	19	
Iran	4'750	1.8	4'619	131
Israel	1'110	4.2	790	321
Italy	9'984	25.5	7'625	2'359
Jordan	167	3.8		
Kenya	16'566	7.9	16'164	402
Kuwait	10	0.3	10	
Lebanon	100	2.2	72	27
Madagascar	4'618	1.6	4'514	104
Mali	1'922	2.0	1'922	
Martinique (France)	288	0.0	167	122
Mayotte	5	0.0	5	
Mexico	29'194	4.8	29'194	
Montenegro	2	0.2	1	1

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Morocco	791	0.5	632	159
Mozambique	785	0.7	785	
Nicaragua	3'301	16.9	2'953	348
North Macedonia	12	31.6	2	10
Pakistan	2'454	0.6	2'454	
Palestine	9	0.8	156	36
Peru	15'427	5.6	11'500	3'926
Philippines	2'203	0.2	2'203	
Portugal	1'102	7.4	881	221
Réunion (France)	492	0.0	380	112
Rwanda	1'105	0.3	928	177
Saudi Arabia	6'314	5.4	6'314	
Senegal	965	4.2	965	
Slovenia	52	32.5	32	20
South Africa	1'523	3.8	1'521	2
Spain	6'930	9.1	4'140	2'789
Suriname	52	2.0	52	
Taiwan	1'726	2.1	1'726	
Tanzania	1'336	0.2	1'336	
Togo	484	21.1	484	
Tunisia	5'268	5.7	5'268	
Turkey	22'396	33.0	17'884	4'512
Uganda	16'526	1.7		
United Arab Emirates	777	2.2	777	
USA	5'122	13.5	5'122	
Viet Nam	19'178	7.0	19'118	60
World	**292'535**	**1.0**	**245'103**	**30'350**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments.

› Grapes

In 2020, almost 506'400 hectares or 7.3% of the global grape area was under organic management.

Grapes: Organic area by country

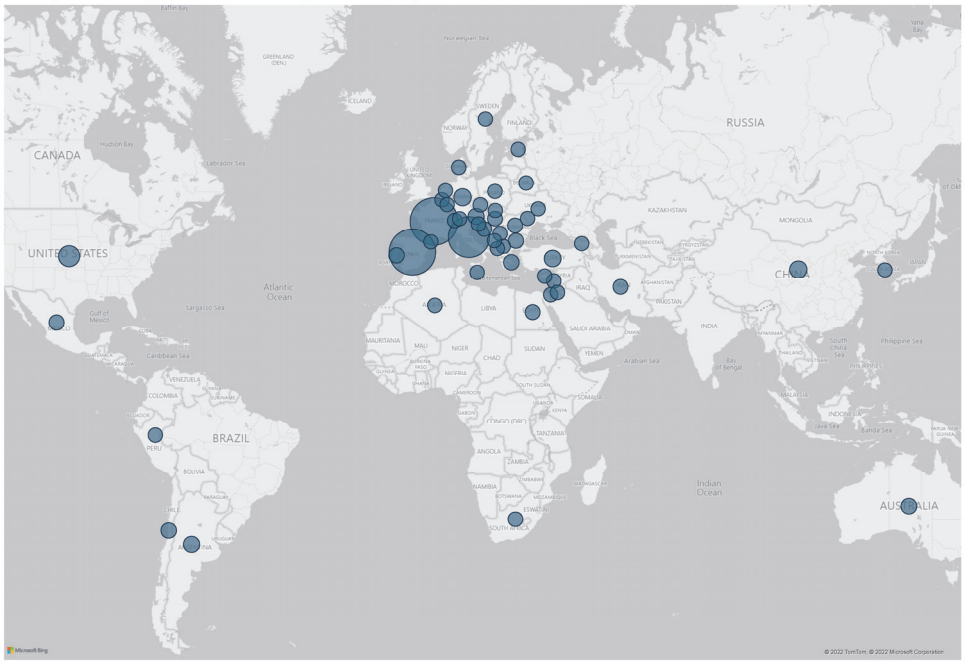


Figure 43: Grapes: Organic area 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments.

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

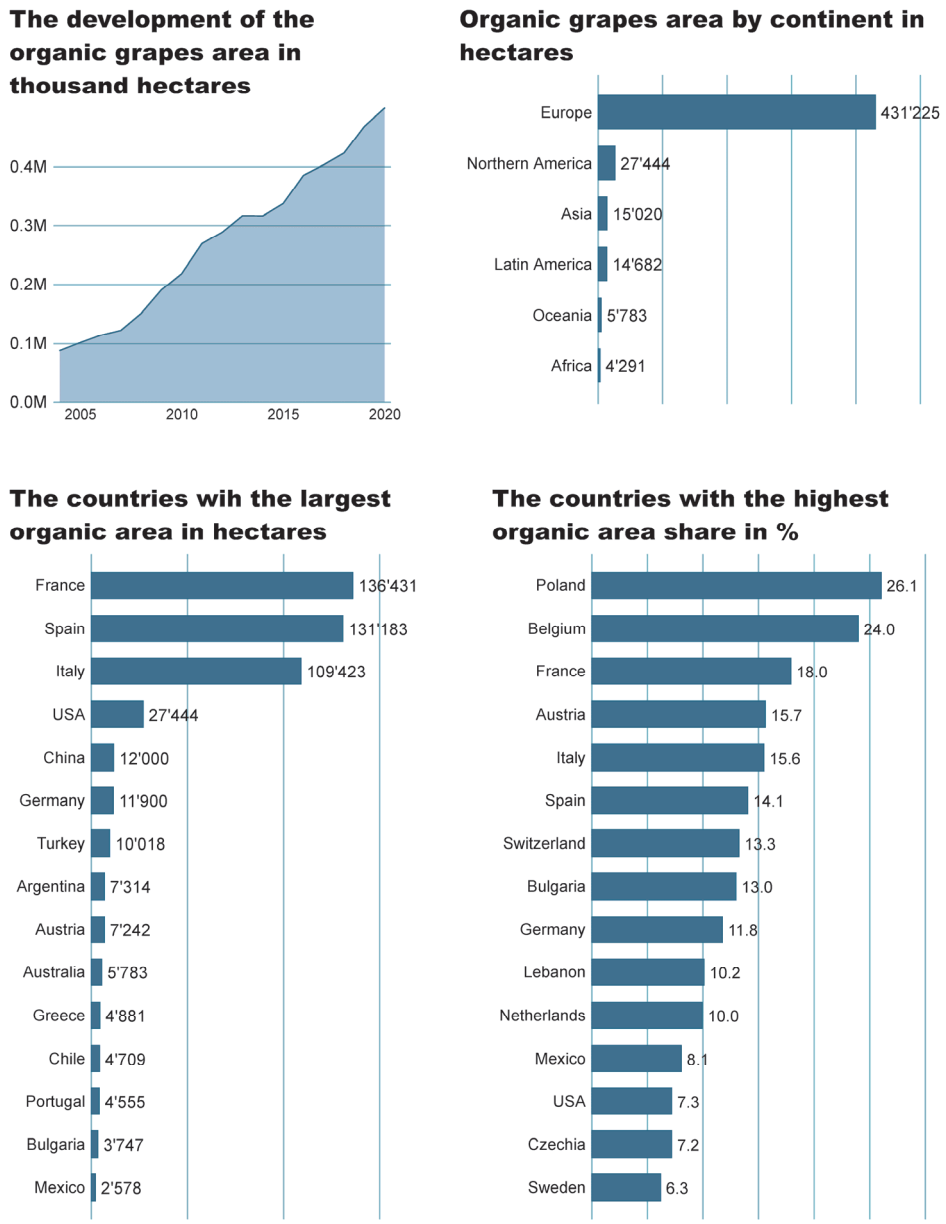


Figure 44: Grapes: Organic area 2020

Source: FiBL survey 2022, 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 2020

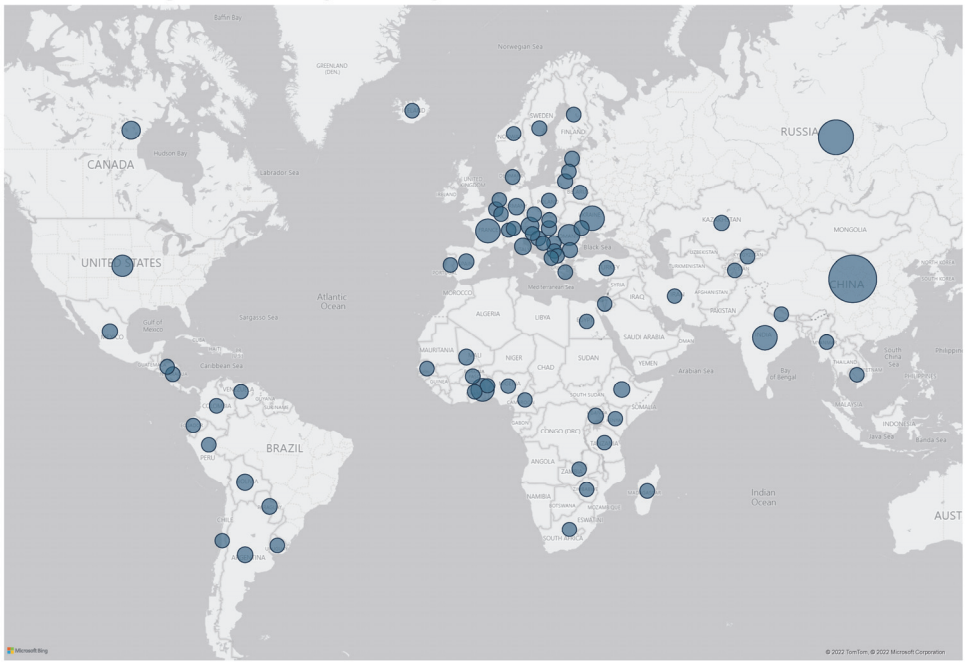
Country	Organic area [ha]	Organic area [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	13	0.1	0	12
Algeria	208	0.3	208	
Andorra	2	0.0	2	
Argentina	7'314	3.4		
Australia	5'783	4.3	888	
Austria	7'242	15.7		
Belarus	0	0.0	0	
Belgium	118	24.0	82	35
Bulgaria	3'747	13.0	3'139	608
Chile	4'709	2.4	4'709	
China	12'000	1.6	8'000	4'000
Croatia	1'067	5.0	897	170
Cyprus	252	3.7	242	10
Czech Republic	1'168	7.2	854	314
Denmark	81	0.0	46	35
Egypt	2'157	2.9	2'157	
Estonia	4	0.0	4	
France	136'431	18.0	79'154	57'277
Georgia	130	0.2	55	75
Germany	11'900	11.8		
Greece	4'881	4.7	4'046	835
Hungary	2'057	3.4	1'462	595
Iran	2'012	1.3	2'012	
Israel	85	1.1	68	17
Italy	117'378	16.7	93'316	24'062
Jordan	10	0.3		
Lebanon	714	10.2	652	62
Liechtenstein	4	0.0	4	
Luxembourg	65	5.3	65	
Malta	10	2.2	7	3
Mexico	2'578	8.1	2'578	
Moldova	41	0.0	6	36
Montenegro	0	0.0	0	
Netherlands	17	10.0	15	2
North Macedonia	131	0.5	2	129
Peru	81	0.3	79	2
Poland	235	26.1	177	59
Portugal	4'555	2.6	3'360	1'195
Republic of Korea	70	0.6		
Romania	2'509	1.4	1'867	642
Serbia	1'166	5.7	13	1'154
Slovakia	266	3.4	139	128
Slovenia	766	5.0	534	233
South Africa	1'926	1.7	1'544	382
Spain	131'183	14.1	103'250	27'933
Sweden	5	6.3	5	
Switzerland	1'783	13.3		
Turkey	10'018	2.5	6'919	3'099
Ukraine	84	0.2		
USA	27'444	7.3	27'444	
World	**506'400**	**7.3**	**350'003**	**123'103**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322
Blank cells: Not data

› Oilseeds

In 2020, more than 1'795'000 hectares or 0.8 percent of the global oilseeds area was under organic management.

Oilseeds: Organic area by country



Oilseeds: Distribution of global organic oilseeds area by crop

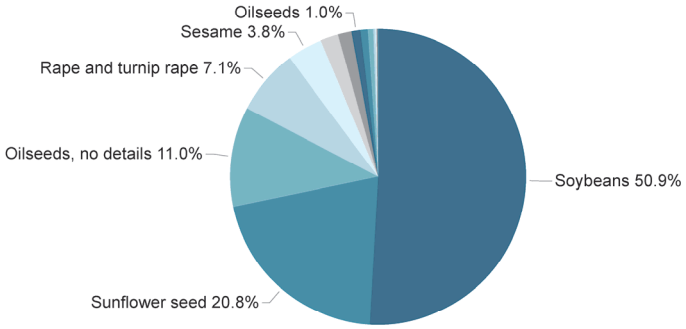


Figure 45: Oilseeds: Organic area 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments.

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

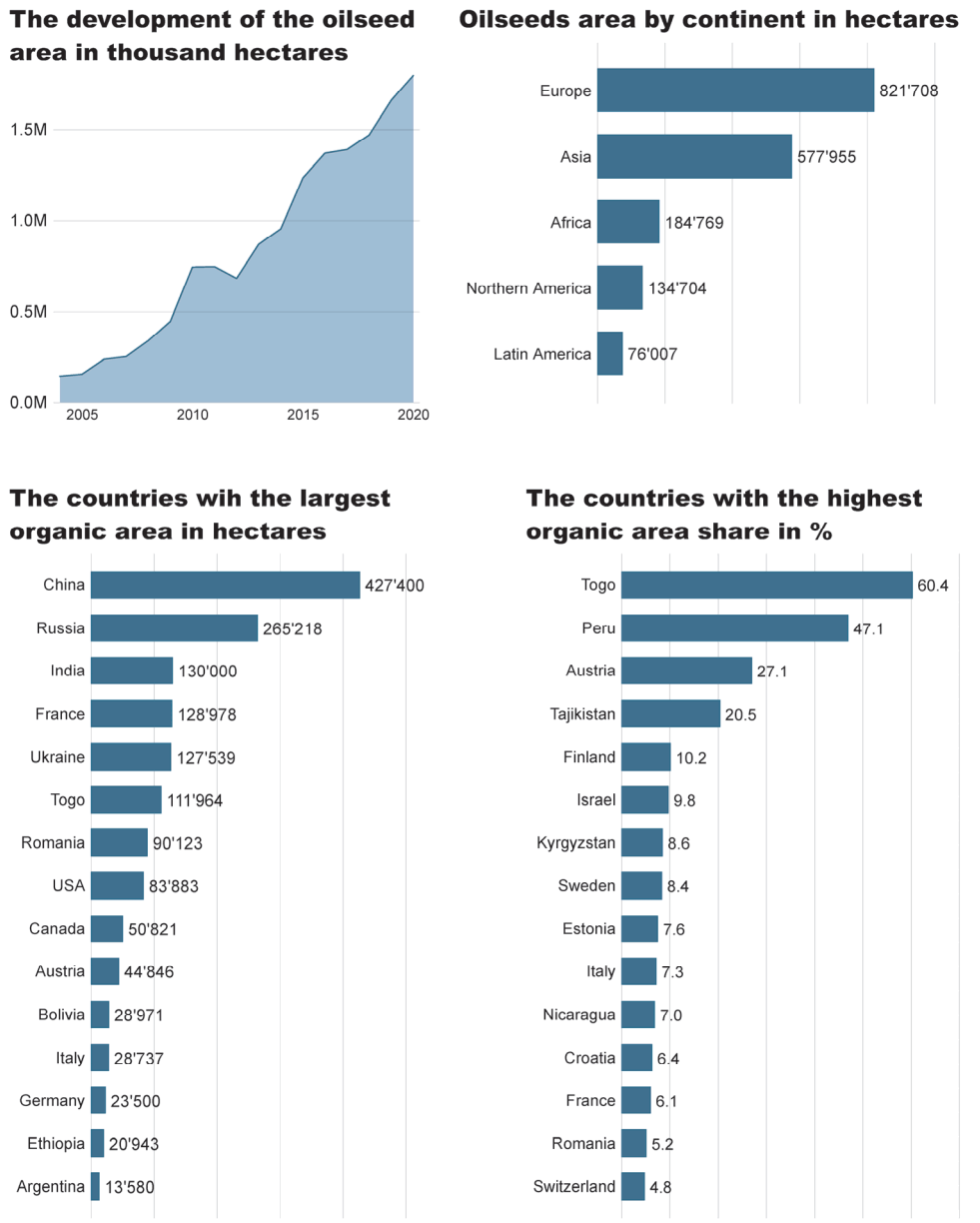


Figure 46: Oilseeds: Organic area 2020

Source: FiBL survey 2022, 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 2020

Country	Organic area [ha]	Organic area [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	2	0.4	2	
Argentina	13'580	0.1		
Austria	44'846	27.1		
Belarus	29	0.0	29	
Belgium	256	3.1	200	56
Benin	4'296	1.0	4'296	
Bolivia	28'971	1.9	26'513	2'458
Bosnia and Herzegovina	29	0.2	29	
Bulgaria	10'070	1.1	9'277	793
Burkina Faso	5'370	0.5	5'292	78
Cambodia	73	0.0	73	
Cameroon	2	0.0		
Canada	50'821	0.5		
Chile	12	0.0	12	
China	427'400	2.0	365'700	61'700
Colombia	40	0.1	40	
Croatia	11'043	6.4	8'910	2'134
Czech Republic	2'409	0.5	2'080	328
Denmark	3'503	2.4	2'305	1'197
Ecuador	152	0.3	111	41
Egypt	1'740	1.4	1'740	
Estonia	5'747	7.5	5'528	219
Ethiopia	20'943	2.3		
Finland	2'566	10.2	2'566	
France	128'978	6.1	92'867	36'111
Germany	23'500	2.3		
Ghana	3'158	0.6	3'158	
Greece	3'099	2.9	2'320	778
Honduras	52	2.2	52	
Hungary	11'024	1.1	9'747	1'277
Iceland	6	0.0	6	
India	130'000	0.5		
Iran	650	0.2	650	
Israel	757	9.8	380	377
Italy	28'737	7.3	23'599	5'137
Kazakhstan	13'462	0.5		
Kenya	935	0.5	715	
Kosovo	324	0.0	324	
Kyrgyzstan	2'235	8.6		
Latvia	2'735	1.8	2'558	178
Liechtenstein	24	0.0	24	
Lithuania	9'998	3.4	9'037	961
Luxembourg	20	0.7	20	0
Madagascar	3'409	3.8	3'395	
Mali	12'443	2.2	12'443	

Country	Organic area [ha]	Organic area [%]	Area fully converted [ha]	Area under conversion [ha]
Mexico	12'930	4.2	12'930	
Moldova	8'852	2.0	6'876	1'976
Myanmar	576	0.0	576	
Nepal	122	0.0		122
Netherlands	89	2.7	88	1
Nicaragua	4'108	7.0	3'962	146
Nigeria	4'638	0.1	4'638	
North Macedonia	3	0.1	3	
Norway	72	2.1	52	20
Paraguay	9'919	0.3	9'781	139
Peru	2'787	47.1	2'014	774
Poland	4'292	0.4	1'551	2'741
Portugal	34	0.4	34	
Romania	90'123	5.2	68'993	21'131
Russian Federation	265'218	1.9		
Senegal	126	0.0	126	
Serbia	1'282	0.3	1'228	54
Slovakia	5'120	1.9	3'746	1'374
Slovenia	364	3.7	321	42
Spain	11'606	1.5	8'449	3'157
Sweden	8'441	8.4	7'892	548
Switzerland	1'501	4.8		
Tajikistan	2'679	20.5		
Tanzania	3'116	0.1	3'116	
Togo	111'964	60.4	111'964	
Turkey	8'226	0.8	4'307	3'921
Uganda	12'438	1.4		
Ukraine	127'539	1.4	104'820	8'193
USA	83'883	0.3	83'883	
Uruguay	1'964	0.2	1'664	300
Venezuela	1'490	2.0		
Zambia	183	0.0	183	
Zimbabwe	8	0.0	8	
World	**1'795'143**	**0.8**	**1'039'203**	**158'463**

Source: FiBL survey 2022 based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322. 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 2022."[1]

[1] Claudia Meier, Gregory Sampson, Cristina Larrea, Bernhard Schlatter, Steffany Bermudez, Tuan Duc Dang and Helga Willer (Eds.), The State of Sustainable Markets 2021: 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 2020, almost 895'000 hectares or 8.4 percent of the global olive area was under organic management.

Olives: Organic area by country

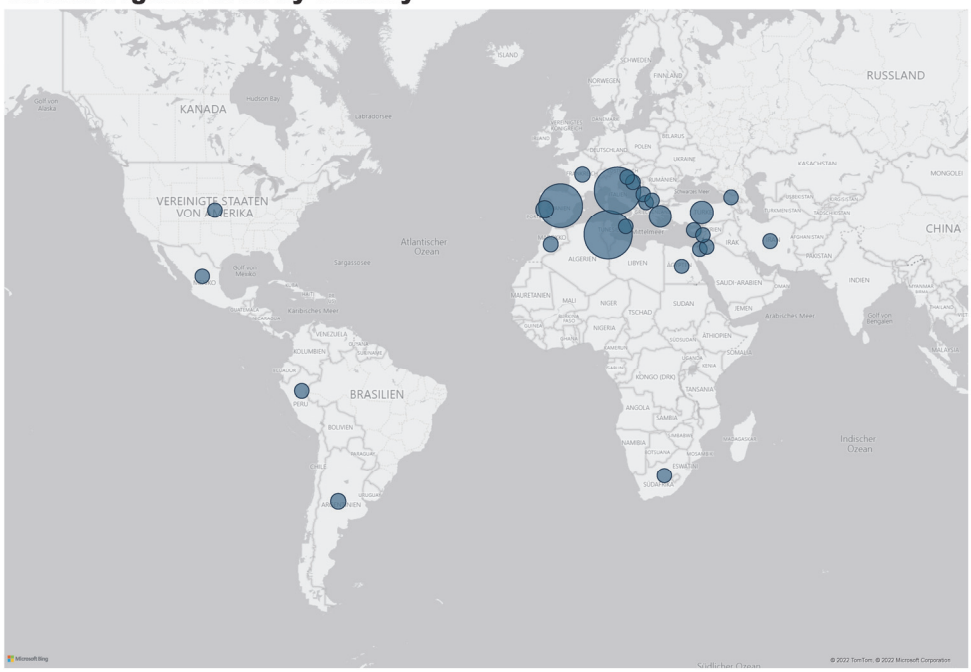


Figure 47: Olives: Organic area 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments.

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

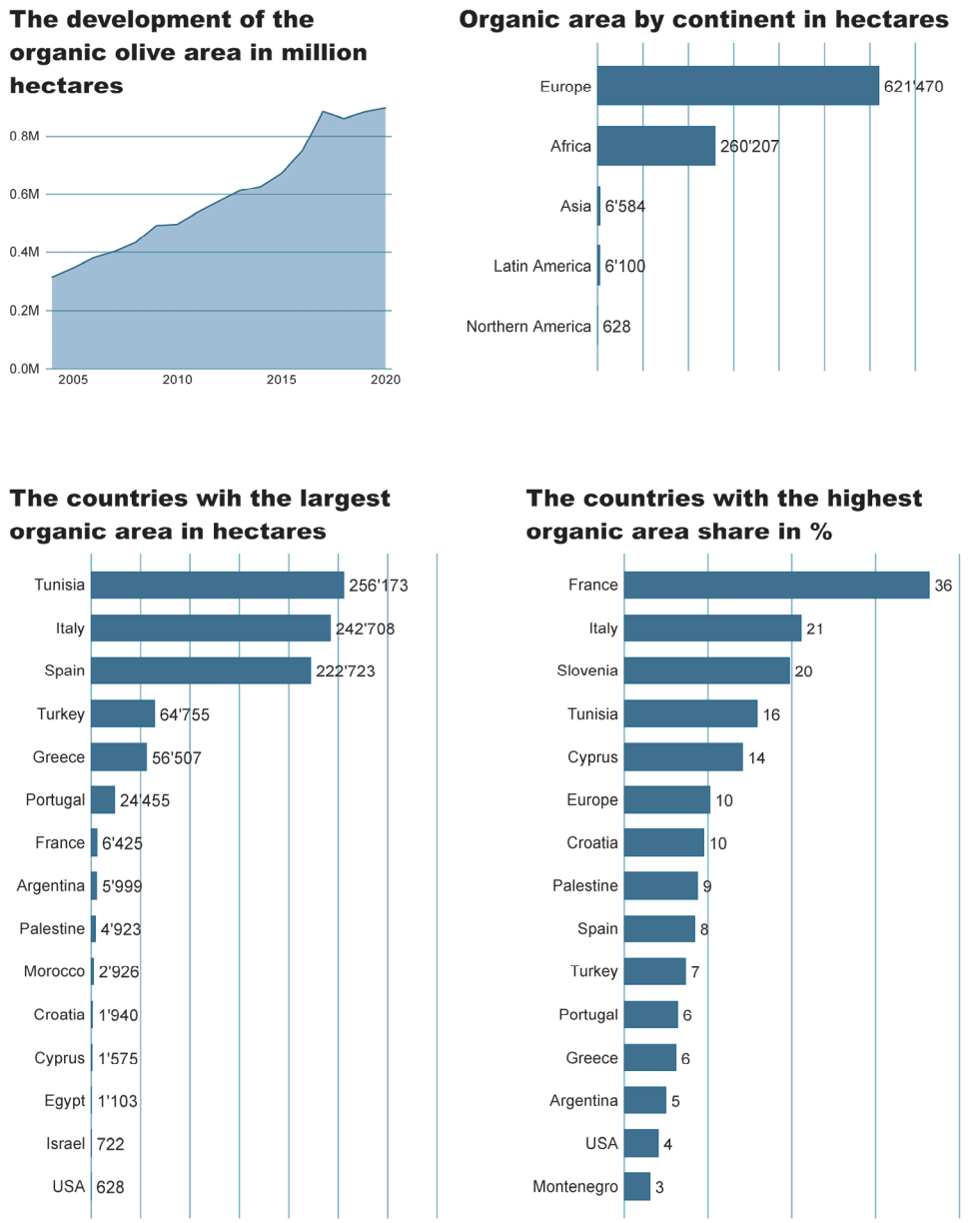


Figure 48: Olives: Organic area 2020

Source: FiBL survey 2022, 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 2020

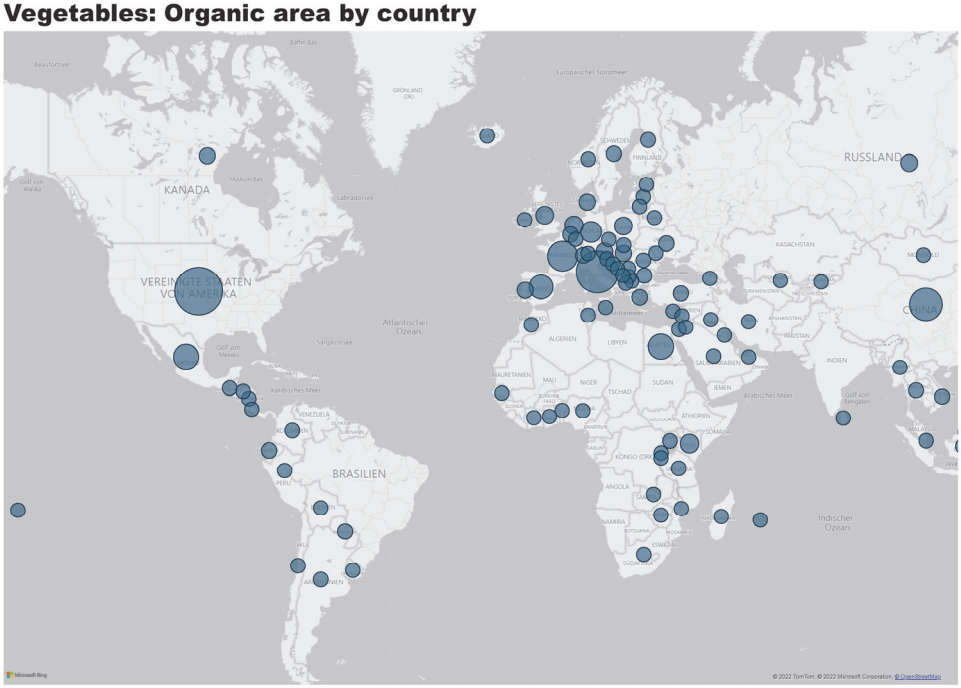
Country	Organic area [ha]	Organic area [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	80	0.2	34	46
Argentina	5'999	5.0		
Croatia	1'940	9.6	1'507	433
Cyprus	1'575	14.2	1'451	124
Egypt	1'103	1.2	1'103	
France	6'425	36.5	4'680	1'746
Georgia	70	0.0		70
Greece	56'507	6.2	38'828	17'678
Iran	245	0.7	155	90
Israel	722	2.1	696	26
Italy	242'708	21.2	203'273	39'434
Jordan	356	0.6		
Lebanon	269	0.4	254	15
Malta	15	0.0	10	5
Mexico	14	0.3	14	
Montenegro	4	3.1	4	
Morocco	2'926	0.3	2'336	590
North Macedonia	1	0.0		1
Palestine	4'923	8.8	4'486	437
Peru	87	0.4	87	
Portugal	24'455	6.4	20'593	3'862
Slovenia	281	19.8	233	48
South Africa	5	0.0	5	
Spain	222'723	8.5	186'701	36'022
Tunisia	256'173	15.9	256'173	
Turkey	64'755	7.4	47'330	17'425
USA	628	4.1	628	
World	**894'989**	**8.4**	**770'581**	**118'051**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322
Blank cells: No data available.

› Vegetables

In 2020, more than 421'000 hectares or 0.7 percent of the global vegetable area was under organic management.

Vegetables: Organic area by country



Vegetables: Distribution of the global organic vegetable area by crop group

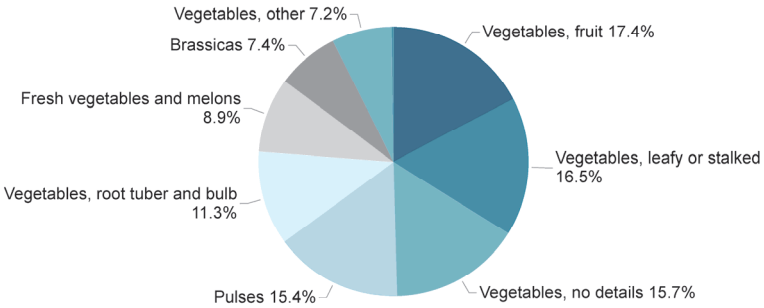


Figure 49: Vegetables: Distribution of organic area by crop group 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments.

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

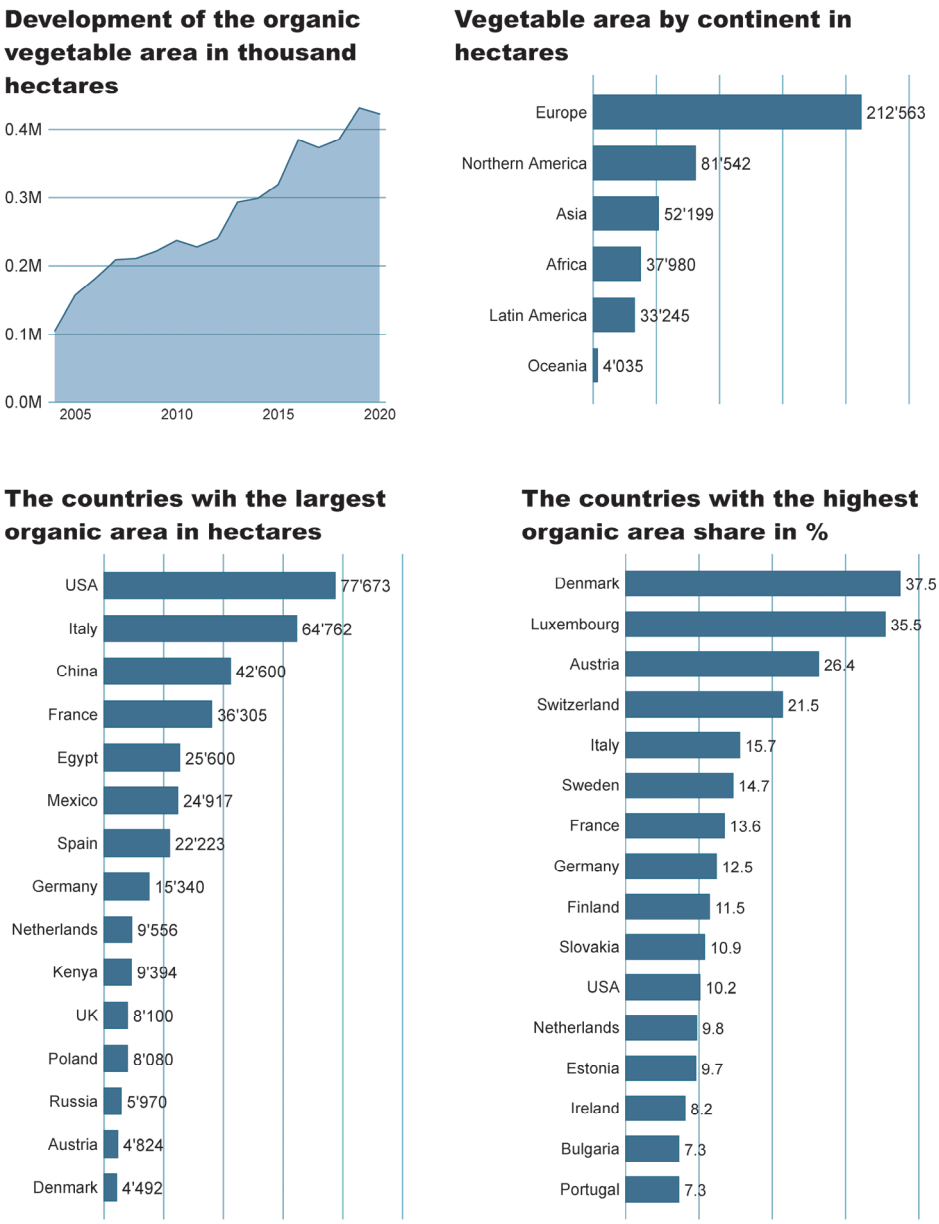


Figure 50: Vegetables: Organic area 2020

Source: FiBL survey 2022, 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 2020

Country/Territory	Organic area [ha]	Organic area [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	3	0.0		3
Argentina	1'168	0.6		
Australia	3'902	5.6	3'902	
Austria	4'824	26.4		
Belarus	12	0.0	12	
Belgium	2'934	4.3	2'717	217
Benin	5	0.0	5	
Bolivia	49	0.1	49	
Bosnia and Herzegovina	9	0.0	9	
Bulgaria	1'867	7.3	1'698	174
Canada	3'868	5.2		
Chile	629	0.9	629	
China	42'600	0.2	29'500	13'100
Colombia	667	0.5	667	
Côte d'Ivoire	1	0.0	1	
Croatia	216	2.6	156	60
Cyprus	115	4.4	94	22
Czech Republic	273	2.4	238	36
Denmark	4'492	37.5	4'308	186
Ecuador	2'356	3.0	2'000	356
Egypt	25'600	3.5	25'600	
Estonia	199	9.7	166	31
Finland	1'417	11.5	1'417	
France	36'305	13.5	32'831	3'474
French Polynesia	25	4.4	25	
Georgia	8	0.0	8	
Germany	15'340	12.5		
Greece	2'866	3.9	1'914	952
Guatemala	593	0.5	593	
Honduras	115	0.6	115	
Hungary	4'338	5.1	3'487	851
Iceland	16	0.0	16	
Indonesia	22	0.0	22	
Iran	385	0.1	100	285
Iraq	53	0.0		
Ireland	367	8.2	287	80
Israel	654	0.6	645	6
Italy	64'762	15.7	53'093	11'669
Jordan	16	0.1		
Kenya	9'394	4.8	9'394	
Kosovo	147	0.0	147	
Kuwait	23	0.4	23	
Kyrgyzstan	32	0.0		
Latvia	536	6.5	466	70
Lebanon	51	0.2	51	1
Liechtenstein	9	0.0	9	
Lithuania	495	4.0	472	23
Luxembourg	64	35.5	61	3
Madagascar	98	0.1	98	
Malaysia	161	0.2	161	
Malta	5	0.4	6	
Mauritius	3	0.0	3	
Mexico	24'917	3.5	24'917	
Moldova	2	0.0	1	0
Mongolia	188	1.6		187
Montenegro	2	0.1	2	0
Morocco	605	0.3	589	16
Mozambique	4	0.0	4	
Myanmar	50	0.0	50	

Country/Territory	Organic area [ha]	Organic area [%]	Area fully converted [ha]	Area under conversion [ha]
Netherlands	9'556	9.8	9'446	110
Nicaragua	205	2.8	205	
Nigeria	50	0.0	50	
North Macedonia	202	0.4	121	81
Norway	373	4.8	367	6
Palestine	12	0.1	12	
Paraguay	2'089	4.4	2'089	
Peru	447	0.2	382	65
Philippines	9	0.0	9	
Poland	8'080	5.4	7'081	1'000
Portugal	4'342	7.3	4'010	348
Republic of Korea	310	0.1		
Romania	830	0.6	503	329
Russian Federation	5'970	1.0		
Rwanda	30	0.0	30	
Saudi Arabia	620	0.9	620	
Senegal	129	0.1	129	
Serbia	100	0.1	88	9
Singapore	15	1.0	15	
Slovakia	799	10.9	499	300
Slovenia	308	4.3	274	35
South Africa	487	0.4	431	56
Spain	22'223	5.8	19'220	3'034
Sri Lanka	128	0.2	128	
Sweden	2'168	14.7	2'144	24
Switzerland	2'991	21.5		
Taiwan	3'356	2.4	3'356	
Tanzania	1'080	0.2	1'080	
Thailand	1'404	0.3		
Tonga	108	1.5	108	
Tunisia	218	0.1	218	
Turkey	2'173	0.2	1'340	858
Uganda	255	0.1		
Ukraine	2'734	0.5		
United Arab Emirates	6	0.1	6	
United Kingdom	8'100	0.0	7'400	700
USA	77'673	10.2	77'673	
Uruguay	10	0.1	6	4
Uzbekistan	40	0.0		
Viet Nam	2'057	0.2	1'981	76
Zambia	5	0.0	5	
Zimbabwe	15	0.0	15	
World	**421'563**	**0.7**	**343'797**	**38'838**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Organic Cotton

TEXTILE EXCHANGE[1]

A record-breaking harvest

This is the fourth year in a row that organic cotton production has increased, and – though at a steadier rate than in recent years – it was enough to make 2019/20 a record-breaking season with the biggest ever harvest of organic cotton. This follows three years of strong growth; 31 percent in 2018/19, 55 percent in 2017/18 and 10 percent in 2016/17.

In total, production has increased 112 percent in the previous four years, from 118'032 tonnes (MT) in 2016/17. Organic cotton accounted for almost one percent of global cotton production in 2019/20, up from 0.5 percent in 2016/17.

Development of organic cotton fibre production
Source: Textile Exchange Organic Cotton Market Report 2021

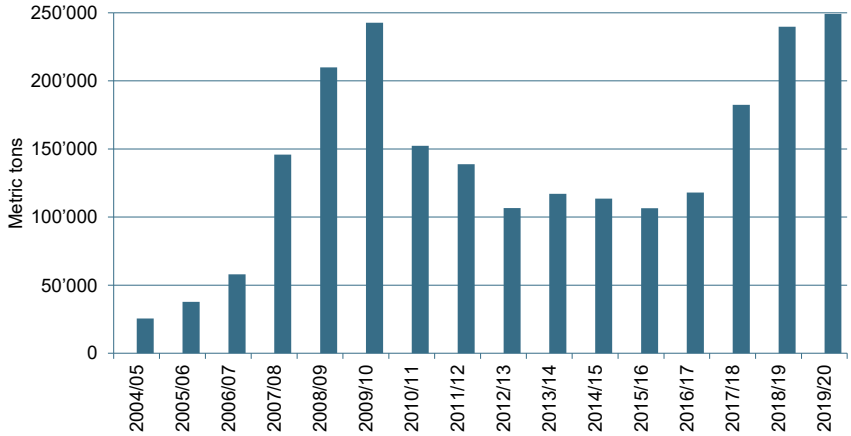


Figure 51: Development of organic cotton fibre production in metric tons

Source: Textile Exchange Organic Cotton Market Report 2021

The line-up

Two new countries joined the line-up of organic cotton producing countries in 2019/20;

[1] This article draws from the 2021 Organic Cotton Market Report produced by Textile Exchange. Report production is conducted by Lisa Barsley, Sarah Compson, Matilda Donaldson, Alice Dos Santos, Amish Gosai, Rui Fontoura, and Sandra Marquardt. Production data is collected by Ömür Suner and Atila Ertem (EMENA and Central Asia), Amish Gosai (South and Southeast Asia), Sandra Marquardt (United States), Silvio Moraes (Latin America and the Caribbean), Leonard Mtama (East Africa), and Silvère Tovignan and Lazare Yombi (West Africa). Data analytics is carried out by Suet Yin Siew, Evonne Tan, and Jack Tan. The full 2021 Organic Cotton Market Report is available here: https://textileexchange.org/organic-cotton-market-report/

Uzbekistan, thanks to a new GIZ[1]-supported project, and Myanmar, where the "Pure Sense Organics Myanmar" collaboration reached certification. Argentina's organic cotton production temporarily dropped out of certification, while Senegal, which did the same in 2018/19, came back on board in 2019/20.

The top seven

Approximately 95 percent of global organic cotton production stems from just seven countries. This is down from the 97 percent these seven countries have accounted for the last five years, as smaller organic cotton-producing countries scaled up.

Ranked by production, the top seven countries were India (50 percent), China (12 percent), Kyrgyzstan (12 percent), Turkey (10 percent), Tanzania (5 percent), Tajikistan (4 percent) and the U.S. (3 percent).

While the list of countries remained the same, Tanzania's impressive growth saw it jump into another place from the sixth to the fifth largest producer of organic cotton globally.

Countries fuelling the growth

The biggest contributors to the global growth seen in 2019/20 were Tanzania and Kyrgyzstan, with volume increases of 6'004 tonnes and 5'778 tonnes over the previous year, respectively. Other significant contributors, which each saw their production totals grow by between one and two thousand metric tons, were Uganda, the U.S., Pakistan, India and Turkey.

Four countries experienced a decrease in production in 2019/20: Tajikistan (-14 percent), Egypt (-17 percent), Thailand (-17 percent), and China (-26 percent). China and Tajikistan's decreases had the most significant impact on the global total as they are the second and sixth (previously fifth) largest producers, respectively.

Please read the individual country pages in Textile Exchange's full Organic Cotton Market Report to learn more about each country's production trends.

Conversion to organic production

India once again had the most land in conversion to organic, with a total of 22'936 hectares, followed by Turkey (9'014 hectares), Tajikistan (8'595 hectares), Tanzania (3'416 hectares) and China (2'643 hectares). The remaining countries together had 3'948 ha. Thus, a total of 50'552 hectares of cotton-growing land were in conversion to organic in 2019/20, which is equivalent to nine percent of the total certified production area.

Regional trends

Sub-Saharan Africa saw the biggest growth in 2019/20, with production rising 91 percent, thanks primarily to the expansion of projects in Tanzania and Uganda. The region now accounts for seven percent of the global total.

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[1] The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH is Germany's leading provider of international cooperation services.

The U.S. saw the second most significant rise in production, growing 34 percent, followed by Latin America & the Caribbean (27 percent), EMENA Europe, Middle East and North Africa) and Central & Western Asia (10 percent).

The Southern & South East Asia region, which accounts for just over half of global organic cotton production and which saw a momentous growth of 44 percent last year (primarily from India), experienced a steadier growth of three percent in 2019/20, with a large portion of this stemming from Pakistan.

China is the only region that experienced a decline in production due to some of the country's key organic cotton producer groups reducing their land area under organic cotton (see full report for details).

2020/21 forecast

Organic cotton production is forecasted to skyrocket in 2020/21, with an estimated 48 percent growth, stemming predominantly from India and Turkey. In India, this growth is largely a result of increased demand causing organic cotton prices to increase. This, in turn, makes it a more attractive option for farmers and is leading existing producers to dedicate a larger share of their certified organic land to growing cotton versus other crops. In Turkey, increased demand is also the main driver, but the growth is more a result of new producers starting up organic cotton production.

International voluntary standards for organic cotton

Organic output is subject to national laws governing organic production, including:

- The European Union's Organic Regulation 834/2007
- India's National Programme for Organic Production (NPOP)
- USDA's National Organic Program (NOP), used globally
- China's National Organic Product Standard (GB/T 19630-2011)

International voluntary standards, the Global Organic Textile Standard (GOTS) and the Organic Content Standard (OCS) provide a chain of custody assurance from the farm to the final product, with GOTS also addressing textile processing. Both GOTS and OCS accept organic output from any IFOAM family of standards.

GOTS is a voluntary global standard for the entire post-harvest processing of apparel and home textiles made with certified organic fibre and includes both environmental and social criteria. The year 2020 saw record growth for GOTS certified facilities, with the total growing 34 percent, from 7'765 in 2019 to 10'388 in 2020.

OCS sets requirements for third-party certification of certified organic input and chain of custody, with the goal being to increase organic agriculture production. The year 2020 saw record growth for OCS certified facilities, with the total growing 40 percent, from 6'181 in 2019 to 8'680 in 2020.

Further reading

Textile Exchange (2021): Organic Cotton Market Report 2021. The Textile Exchange, Texas. Available at https://textileexchange.org/organic-cotton-market-report/

Table 37: Organic cotton farmers, area, and production 2019/2020[1,2]

Region	Country	No. of farmers	Certified organic land area [ha]*	Prod. of organic seed cotton [MT]	Prod. of organic cotton fibre [MT]	Share of global organic fibre prod. [%]	Total in-conversion land area [ha]
Sub-Saharan Africa	Benin	4'976	7'185	3'373	1'373	0.6%	-
Sub-Saharan Africa	Burkina Faso	7'931	4'351	1'388	574	0.2%	-
Sub-Saharan Africa	Ethiopia	200	174	400	148	0.1%	-
Sub-Saharan Africa	Mali	880	12'563	213	85	0.03%	-
Sub-Saharan Africa	Senegal	96	30	8	3	0.0%	-
Sub-Saharan Africa	Tanzania	18'945	154'495	24'145	11'285	4.5%	3'416
Sub-Saharan Africa	Uganda	25'344	39'741	11'271	4'734	1.9%	-
Sub-Saharan Africa Total		*58'372*	*218'538*	*40'798*	*18'202*	*7.3%*	*3'416*
Eastern Asia	China	768	15'862	80'470	30'589	12.3%	2'643
Eastern Asia Total		*768*	*15'862*	*80'470*	*30'589*	*12%*	*2'643*
EMENA[3], Central & Western Asia	Egypt	12	198	625	238	0.1%	-
EMENA, Central & Western Asia	Greece	no data	2'150	5'212	1'720	0.7%	1'714
EMENA, Central & Western Asia	Kyrgyzstan	504	18'416	85'278	29'415	11.8%	685
EMENA, Central & Western Asia	Tajikistan	1'169	8'145	30'581	10'471	4.2%	8'595
EMENA, Central & Western Asia	Turkey	600	11'551	60'657	24'288	9.8%	9'014
EMENA, Central & Western Asia	Uzbekistan	24	193	503	165	0.1%	-
EMENA. Central & Western Asia Total		*2'309*	*40'653*	*182'857*	*66'297*	*27%*	*20'009*
Latin America & the Caribbean	Brazil	1'894	12'348	358	134	0.1%	834

[1] Please note that the organic cotton land area figures reported by Textile Exchange refer to total land certified to an organic standard by a producer group growing organic cotton. The figures can include rotation and other crops, too, and therefore do not usually reflect the land area used to grow only organic cotton. This is why land area does not directly correlate with production volume, and yield cannot be established using these figures.
[2] Please note that some organic cotton farmers are involved in group certification under internal control system (ICS), 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.
[3] EMEA is a shorthand designation meaning Europe, the Middle East and Africa.

Statistics › Organic Cotton

Region	Country	No. of farmers	Certified organic land area [ha]*	Prod. of organic seed cotton [MT]	Prod. of organic cotton fibre [MT]	Share of global organic fibre prod. [%]	Total in-conversion land area [ha]
Latin America & the Caribbean	Peru	195	941	1'859	712	0.3%	332
Latin America Total		*2'089*	*13'289*	*2'217*	*846*	*0.3%*	*1'166*
Southern & Southeastern Asia	India	164'677	285'196	335'794	124'244	49.9%	22'936
Southern & Southeastern Asia	Myanmar	51	50	90	32	0.01%	-
Southern & Southeastern Asia	Pakistan	889	3'064	5'455	2'026	0.8%	17
Southern & Southeastern Asia	Thailand	42	44	14	5	0.002%	-
Southern & Southeastern Asia Total		*165'659*	*288'354*	*341'354*	*126'306*	*51%*	*22'953*
Northern America	United States	83	11'728	21'327	6'913	2.8%	366
Global total		229'280	588'425	669'023	249'153	100%	50'552

Source: Textile Exchange Organic Cotton Market Report 2021

Statistics of the Biodynamic Federation Demeter International

CHRISTOPH SIMPFENDÖRFER[1] AND SARAH FISCHER[2]

Demeter is the only ecological association that has built up a network of individual certification organisations worldwide. In 1997 Demeter-International was founded for closer co-operation in the legal, economic and spiritual spheres. Demeter-International and the International Biodynamic Association (IBDA) joined forces in February 2020 at the annual conference of the Agricultural Section at the Goetheanum in Switzerland to form the Biodynamic Federation Demeter International**.** This new international umbrella organisation unites all Biodynamic and Demeter organisations worldwide.

The Federation has now 46 member organisations in 36 countries. Nineteen are certifying organisations. The International Certification Office (ICO) is certifying in all other countries. There are more than 7'000 Demeter farmers with almost 227'000 hectares in 62 countries (2021).

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 that 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 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 the establishment of autonomous Biodynamic associations and Demeter organisations where none exist.

[1] Christoph Simpfendörfer, Biodynamic Federation Demeter International, Hauptstraße 82, 70771 Echterdingen, Germany, www.demeter.net
[2] Sarah Fischer, Biodynamic Federation Demeter International, Hauptstraße 82, 70771 Echterdingen, Germany, www.demeter.net

Development of Demeter-certified farms
Source: Biodynamic Federation Demeter International 2021

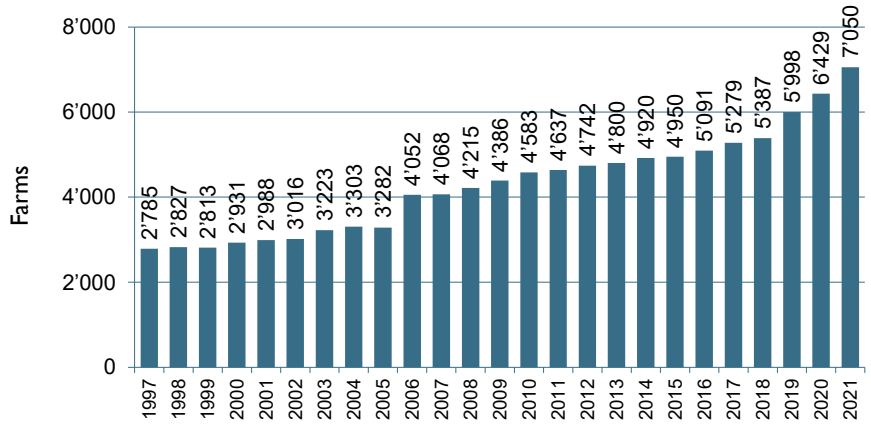


Figure 52: Development of the number of Demeter-certified farms

Source: Biodynamic Federation Demeter International

Development of the Demeter-certified area
Source: Biodynamic Federation Demeter International 2021

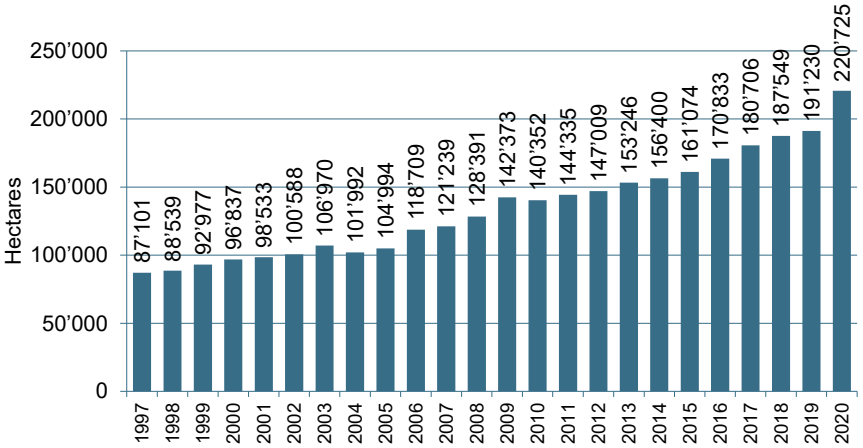


Figure 53: Development of the Demeter-certified area

Source: Biodynamic Federation Demeter International

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 4'000 to almost 7'000. The latest developments show a strong interest in

Demeter certification. As a result of the growth of recent years, today, more than 200'000 hectares of agricultural land are cultivated biodynamically. For example, Demeter bananas and olive oil are currently very dynamic sectors. Due to the great interest in the conversion and the newly created distribution channels, large areas have been converted to biodynamic cultivation.

Biodynamic viticulture is also becoming increasingly important. About 1'012 wineries worldwide are Demeter-certified, led by France with 438 wineries. In non-EU countries, most of the wineries are located in Switzerland, USA, Chile and Argentina. Out of the total 197'000 Demeter-certified area, 17'000 hectares are biodynamic vineyards.

Table 38: Certified Demeter operations in member countries with certifying organisations (October 2021)

	Hectares	Producers	Processors	Distributors
Austria	8'436	260	43	0
Brazil	2'290	22	27	2
Denmark	3'633	48	16	8
Egypt	4'885	169	9	0
Finland	389	13	6	5
France	17'096	803	116	52
Germany	98'185	1'786	453	190
Great Britain	3'220	93	42	9
India	9'792	40	12	2
Italy	12'880	427	97	71
Luxembourg	509	7	2	1
The Netherlands	7'814	158	47	49
New Zealand	659	13	1	0
Norway	458	19	11	6
Slovenia	294	39	2	2
Spain	12'205	321	52	23
Sweden	854	16	9	8
Switzerland	7'331	396	89	66
USA	6'373	140	88	45
Total	**197'303**	**4'770**	**1'122**	**539**

Source: Biodynamic Federation Demeter International

Table 39: Demeter operations certified by the International Certification Office (ICO) in other countries

Country	Hectares	Producers	Processors	Distributors
Argentina	1'011	29	1	2
Belgium	310	8	4	3
Bulgaria	348	4	0	0
Chile	1'357	24	0	2
China	88	3	1	0
Colombia	160	3	0	0
Czech Republic	3'932	7	0	0
Dominican Rep.	2'376	66	0	5
Ecuador	475	88	3	1
Ethiopia	16	1	0	0
Georgia	5	2	0	0
Greece	609	61	6	3
Guinea Bissao	780	1	0	1
Honduras	72	8	0	0
Hungary	6'489	35	1	1
Iran	67	1	1	0
Ireland	258	4	2	0
Japan	0	0	1	0
Kuwait	0	0	1	0
Liechtenstein	43	2	0	0
Lithuania	1'500	11	0	1
Malaysia	0	0	3	0
Mexico	297	4	0	1
Morocco	27	1	0	0
Nepal	7	1	0	0
Paraguay	926	54	0	0
Peru	337	19	3	0
Poland	3'606	24	0	1
Portugal	620	11	2	0
Romania	373	24	0	0
Russia	0	0	0	1
Serbia	45	1	1	0
Singapore	0	0	1	0
Slovakia	158	1	0	0
South Africa	139	3	0	0
Sri Lanka	1'439	1'433	4	0
Tanzania	31	1	0	0
Tunisia	354	160	2	0
Turkey	929	154	1	2
Uganda	470	31	0	0
Ukraine	0	0	0	1
United Arab Emirates	0	0	1	0
Uruguay	0	0	1	0
Total	*29'654*	*2'280*	*40*	*25*
Total Table 38 and Table 39	**226'957**	**7'050**	**1'162**	**564**

Source: Biodynamic Federation Demeter International

Table 40: Demeter certified vintners and grape area worldwide (July 2020)

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

Global market and Organic Imports

The Global Market for Organic Food & Drink[1]

AMARJIT SAHOTA[2]

1 Introduction

As the COVID pandemic continues into its third year, it continues to change the way we live and eat. Health and wellness issues are top of mind for consumers focusing on disease avoidance and building personal immunity. Demand for organic foods has surged since the pandemic began in spring 2020.

Organic food sales increased by 17 billion US dollars[3] in 2020.[4] Healthy growth is expected to continue in the coming years as consumers continue to associate organic foods with good health, nutrition and wellness.

However, there are many challenges ahead. Supply chain issues are expected to continue, whilst competition will come from sustainability standards and eco-labelled products. There are also concerns about adequate supply and regulations.

2 Global market overview

Global sales of organic food & drink increased by 15 percent to 129 billion US dollars in 2020. The market reported the highest growth in terms of revenues this year. The 17 billion US dollar increase was brought about by the pandemic elevating consumer interest in organic foods.

Figure 54 shows historical growth in the global organic products market. The market was worth only a few billion US dollars in the 1990s and reached 18 billion in 2000. Revenues surpassed the 100 billion US dollar mark in 2018. Within two years, the market has expanded to 129 billion US dollars.

North America and Europe comprise most sales, with a combined 90 percent share. Most growth, however, is coming from other regions, especially Asia. Organic food markets are becoming important in countries such as China, India and South Korea.

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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, Email: services@ecoviaint.com

[2] Amarjit Sahota, President of Ecovia Intelligence, London, UK
Amarjit Sahota is the Founder and President of Ecovia Intelligence (formerly Organic Monitor). Since 2001, the organisation has been tracking the global organic & related product industries. More details are on www.ecoviaint.com

[3] In 2020, 1 USD corresponded to 0.876 euros.

[4] 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.

Global market: Growth in global market for organic food & drink, 2000-2020

Source: Ecovia Intelligence

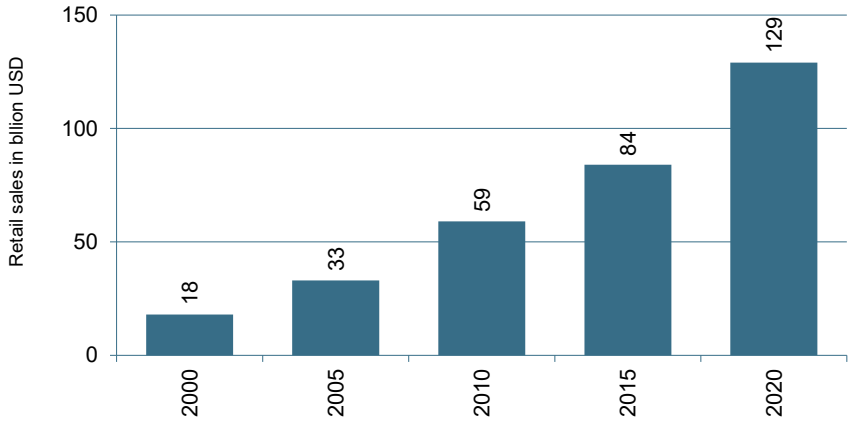


Figure 54: Global market: Growth in global market for organic food & drink, 2000-2020

Source: Ecovia Intelligence

3 Impact of COVID-19

The COVID pandemic is expected to change the global organic food industry in the following ways:

i. De-globalisation of food supply chains

The pandemic has highlighted the vulnerabilities of international supply chains. The supply of raw materials was disrupted when 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 & 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 reliant on organic ingredients from other geographic regions have been the most negatively affected. The way forward appears to have 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. Highly import-dependent countries, such as the UK and the United Arab Emirates, ensured there was no disruption to food imports during the crisis.

Singapore, which imports 90 percent of its food supply, is investing in domestic production. Its government has set a goal of achieving 30 percent of its nutritional needs by domestic production by 2030.

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 the growing acceptance of its environmental and health benefits. Asian and African countries that traditionally focused on export-oriented organic food industries are now 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 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 by reducing 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 transparency and traceability in supply chains of agricultural products is expected to gain impetus. As the 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. A new mobile app (OrgHive) was launched for organic foods last year in China. OrgHive uses blockchain technology to verify the certification of organic foods.

v. Changing consumer behaviour

COVID-19 has had the most impact on us as consumers, changing how we shop and eat. From initial panic-buying and stockpiling to infrequent shopping visits and online purchasing, the coronavirus is causing a major shift in consumer attitudes and behaviour.

Organic food sales have increased significantly during the crisis. However, demand for plant-based foods, nutritional supplements, and natural products is also increasing. Consumers are turning to health & wellness products as they look more closely at disease prevention and maintenance. The challenge is 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.

If consumers do not associate them with sound ethics and nutrition, organic meat sales could suffer the same fate.

vi. Food retailing

Online retailers are clear winners of the current crisis. Amazon, along with Whole Foods Market, have 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.

4 Challenges ahead

Organic food supply

Demand for organic foods is outpacing supply. Although organic farmland is increasing, it is not keeping pace with demand. There were almost 75 million hectares of organic farmland in 2020. However, almost half of this is in Oceania, and the majority is extensive land used by cattle farmers.

United States: Increase in organic land area and food sales, 2000-2019

Source: Ecovia Intelligence

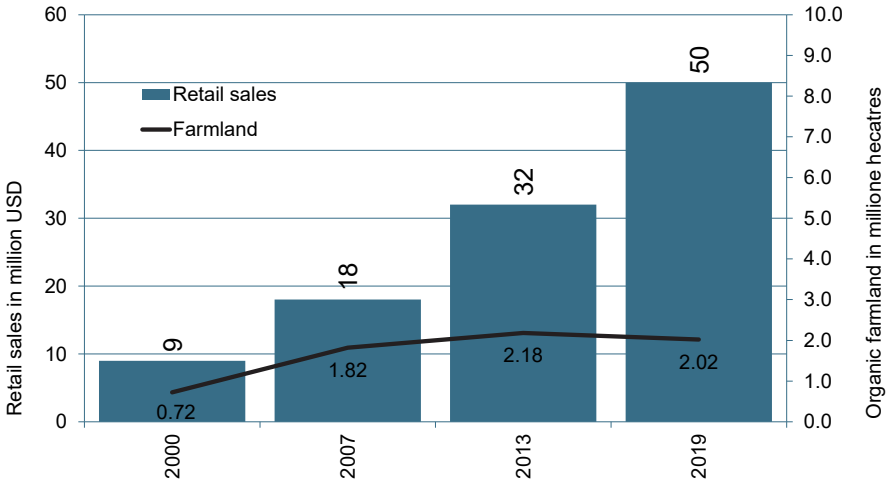


Figure 55: United States: Increase in organic land area and food sales, 2000-2019

Source: Ecovia Intelligence & Industry Sources

North America has the largest market for organic food & drink in the world, comprising almost half of the global revenues. Figure 55 shows that US organic farmland has hardly changed since 2007, although organic food sales have increased manifold. Imports are

meeting the shortfall in organic food production; organic foods and ingredients come into the US from almost every corner of the world.

Consumer demand for organic products has escalated since the pandemic. If production does not keep pace with supply, there will be product shortages and higher prices. There are also concerns the situation will also lead to fraud incidents whereby conventional foods will be falsely labelled as organic.

Consumer behaviour

The reasons for consumers to buy organic foods vary. The pandemic has shown that many consumers associate organic foods with health & wellness. However, in some countries like Denmark and France, consumers also buy organic foods because of the environment. In Germany, animal welfare is the major reason for product purchases. In the USA, avoidance of GMOs is a major factor for consumers to buy organic foods.

The challenge for operators is to communicate the organic message to consumers. What does organic mean? To some consumers, organic foods represent healthy foods as they do not have synthetic pesticides, fertilisers, etc. To others, organic is considered better for the environment or considered more ethical (including animal welfare), support for local producers, avoidance of GM ingredients, etc.

Sustainability schemes and eco-labels

In recent years, there has been a proliferation in the number of sustainability standards and labelling schemes. Organic is just one of these myriads of schemes; the historical timeline of eco-labels (see below) in the food industry below focuses on the official logos for the two major trading blocs, i.e. USDA NOP Organic and EU Organic logo.

Eco-Labels: Historical Timeline

- 1928: Demeter (biodynamic) trademark registered
- 1987: Rainforest Alliance seal launched
- 1990: Vegan trademark launched
- 2000: Marine Stewardship Council label launched
- 2002: USDA national organic logo introduced, EU Organic logo introduced
- 2002: International Fairtrade mark launched
- 2010: Non-GMO Project Verified “butterfly” label launched
- 2011: Roundtable on Sustainable Palm Oil trademark launched
- 2018: Organic food sales surpass 100 billion USD; Fairtrade product sales reach 11 billion USD
- 2018: Merger of Rainforest Alliance – UTZ certified
- 2020: Many new eco-labels follow

Source: Ecovia Intelligence / Sustainable Foods Summit

Although organic has the largest certified land area, other schemes are showing faster growth, especially for agricultural commodities. For instance, the study “The State of

Sustainable Markets, 2020" (Schneider et al. 2020) finds that roughly 27 percent of global cocoa production and 21 percent of global coffee production are now certified. UTZ Certified is the leading sustainability standard for cocoa, whilst 4C leads for coffee.

At the consumer level, a wide range of products are now marketed with eco-labels. It is also common for products to be marketed with multiple eco-labels. The challenge is for organic to remain differentiated in the sea of sustainability schemes and eco-labels.

Plant-based foods

The plant-based foods market is showing exponential growth. A study by Boston Consulting Group and Blue Horizon Corporation projects the market for alternative meat, eggs, dairy and seafood to reach 290 billion US dollars in 2035. Consumer demand for plant-based foods stems from similar factors to organic foods, i.e. health concerns, the environment and ethics.

Similar to organic foods, there has also been a spike in plant-based product sales during the pandemic. In some countries like the USA, sales of organic dairy products have been negatively impacted by plant-based products.

Since consumers buy plant-based foods for the same reasons as organic foods, the concern is that this could erode the demand for organic foods. The growing popularity of a vegan lifestyle is also adding to this.

Regulations and standards

The number of organic standards continues to increase. There are over 80 national standards and many more private/voluntary standards for organic agriculture. Although there is a single organic standard for the major trading blocs (Europe and the US), operators outside these regions must consider multiple certifications. New private standards, like Regenerative Organic, continue to be launched, adding to the certification complexity.

The concern is that producers and retailers may opt for competing sustainability standards. For instance, there are uniform international standards for Rainforest Alliance, Marine Stewardship Council, etc.

Conclusions

Organic food & drink sales are surging during the pandemic. In 2020, organic product sales increased by a staggering 17 billion US dollars – the highest growth in a single year. Consumers are turning to organic foods to improve their health and wellness.

Growth in the organic food & drink market is expected to continue in the coming years. However, there are challenges ahead. As consumers become more sophisticated, they are likely to be more discerning when buying healthy and sustainable foods.

Reference

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://www.intracen.org/uploadedFiles/intracenorg/Content/Publications/SustainableMarkets2020-layout_20201012_web.pdf

Imports of Organic Agri-food Products into the European Union – Summary of the EU Agricultural Market Brief on EU Organic Imports 2020[1]

This is a summary of the European's Commission's Agricultural market brief "EU imports of organic agri-food products - Key developments in 2020" published by the European Commission, DG Agriculture and Rural Development.

While the growth of the EU market for organic agri-food products continued, imports of organic agri-food products decreased slightly between 2019 and 2020. A detailed look at the product categories shows that an increase in imports of organic tropical fruit and rice was more than outweighed by lower imports of other cereals, oilcakes and sugar. Changes were also observed in the ranking of the main trading partners, with China and Ukraine losing their top spots to Ecuador and Dominican Republic. The main importing EU Member States in 2020 were the Netherlands, Germany and Belgium.

The brief analyses EU imports of agri-food products in 2020 and reflects on key developments compared to 2019. It characterises these imports in terms of origin and destination, as well as product categories. EU27 import volumes are underestimated, as data on imports from the UK were not available.

Organic imports

Decrease in import volumes of organic products

Data on import volumes of organic products are made available in Traces (TRAde Control and Expert System).[2] In 2020, the 27 member states of the European Union (EU27) imported 2.79 million metric tons (MT) of organic agri-food products. This represents a 1.9 percent decrease compared to the 2.85 million MT imported in 2019.

Commodities represented 48 percent of 2020 imports, a significant decrease compared to the previous year. The import share of other primary products increased to 42 percent (Table 41).

Classes are defined in the monthly sheet published by DG AGRI to monitor the EU trade of agri-food products.

– "Commodities" includes, among others: cereals, vegetable oils and oilseeds, sugars, milk powders and butter, unroasted coffee and cocoa.

[1] European Commission (2021): EU imports of organic agri-food products. Key developments in 2020. EU Agricultural Market Briefs No 18, June 2021. https://ec.europa.eu/info/sites/default/files/food-farming-fisheries/farming/documents/agri-market-brief-18-organic-imports_en.pdf. The raw data are available under this link: https://ec.europa.eu/info/food-farming-fisheries/farming/facts-and-figures/performance-agricultural-policy/studies-and-reports/market-analyses-and-briefs_en#marketbriefs.

[2] Traces is the European Commission's online management tool hosting the sanitary certificates requested on intra-EU trade andimportation of animals, food, feed and plants.

– "Other primary" includes meat products, fruit &vegetables, milk yoghurt and honey.
– "Processed" includes cheese, meat preparations, wine and fruit juices.
– "Food preparations" includes infant food, confectionery and pasta.
– "Beverages" includes beers, spirits and soft drinks, while
– "non-edible" covers plants and essential oils. Moreover, in its scope, the organic regulation also covers fishery sector products reported under the label "non-agri".

Table 41: Total agri-food import volumes by class, 2019 and 2020

Class	2019 imports [1000 MT]	2020 imports [1000 MT]	Change [%]
Commodities	1'503	1'338	-11.0
Other primary	1'095	1'183	8.0
Processed products incl. wine	190	198	4.2
Food preparations	34	44	29.6
Non-edible	15	19	21.5
Fish and other non-agri	8	10	17.2
Beverages	2	2	-22.3
Total	**2'849**	**2'794**	**-1.9**

Source: Traces

Higher estimated unitary value of imported organic products

In the absence of primary data on unit values for organic imports in Traces, estimates have been made using prices for total trade volumes of the same six classes and 68 agri-food product categories based on data from Comext.

The unitary value of commodities is comparatively lower than that of other agri-food products. As a result, while they represent 48 percent of the 2020 organic imports in volume, their share is 29 percent in value. Other primary products are estimated to account for 53 percent of the value of organic imports, compared to 42 percent in volume. Processed products and food preparations have a much higher unitary value and represent 14 percent of the total value (9 and 5 percent, respectively), which is almost double their share in volume terms (9 percent).

Origin and destination of organic imports

The largest volume of organic products still enters the EU through the Netherlands

Almost one-third of the 2020 organic imports into the EU are imported by the Netherlands (31 percent). Next come Germany (18 percent), Belgium (11 percent) and France (10 percent). Organic imports into Member States that joined the EU after 2004 increased to 5 percent, compared to 4 percent in 2019 (Figure 56). See table on organic imports by EU member state in the European chapter on page 270.

The main trading partners include Ecuador, Dominican Republic, China and Ukraine

Imports from Ecuador, Dominican Republic and Peru mainly include organic tropical fruit, nuts and spices, while imports from China and India include mainly organic oilcakes. Organic cereals is the main imported product group from Ukraine, organic fruit and vegetables is the main group from Turkey, and organic sugar is the number one export from Brazil and Colombia. The ten largest export countries of organic products to the EU represented 64 percent of imports in 2020 (Figure 57) (Table 47).

Together, exports to the EU from these ten countries decreased by 7 percent, while exports from the remaining exporters increased by 9 percent. In addition, the total number of exporter countries increased to 120 compared to 118 in 2019 (Table 46).

Key imported organic products

Tropical fruit still on top of imported products

The ten most imported product categories represented 77 percent of total organic import volumes in 2020. By far, the biggest category is tropical fruit, nuts and spices with 30 percent or 0.84 million MT, followed by oilcakes (8 percent or 0.23 million MT), beet and cane sugar (7 percent or 0.19 million MT) and vegetables (5 percent or 0.15 million MT).

Compared to 2019 organic imports, an increase was observed in the volume imported of tropical fruit, nuts and spices (+9 percent), vegetables (+1 percent), unroasted coffee, tea and maté (+5 percent), soybeans (+5 percent), fruit excluding citrus and tropical (+7 percent) and rice (+33 percent). Also, for the first time in 2020, imports of organic products from the casein product group were recorded, and olive oil saw significant growth (+41 percent).

The remaining top-ten product categories decreased compared to the previous year: oilcakes (-22 percent), sugar (-10 percent), oilseeds other than soybeans (-12 percent), and especially cereals other than wheat and rice (-41 percent). The volume of organic wheat, which wasin the top-ten organic products imported in 2019, also decreased sharply by 34 percent in 2020 (0.09 million MT in 2020, compared to 0.13 million MT the year before).

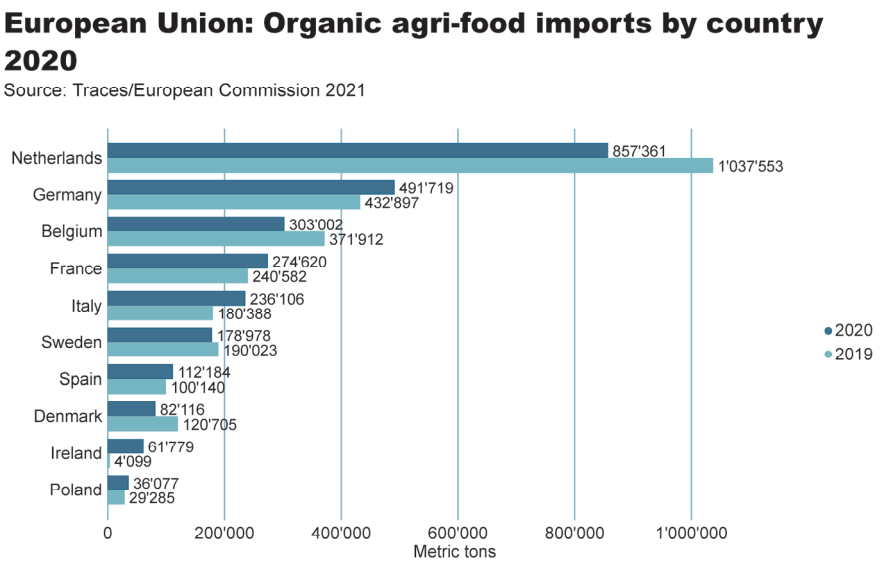


Figure 56: EU organic import volumes: Organic agri-food imports by country 2020 (top ten)

Source: Traces

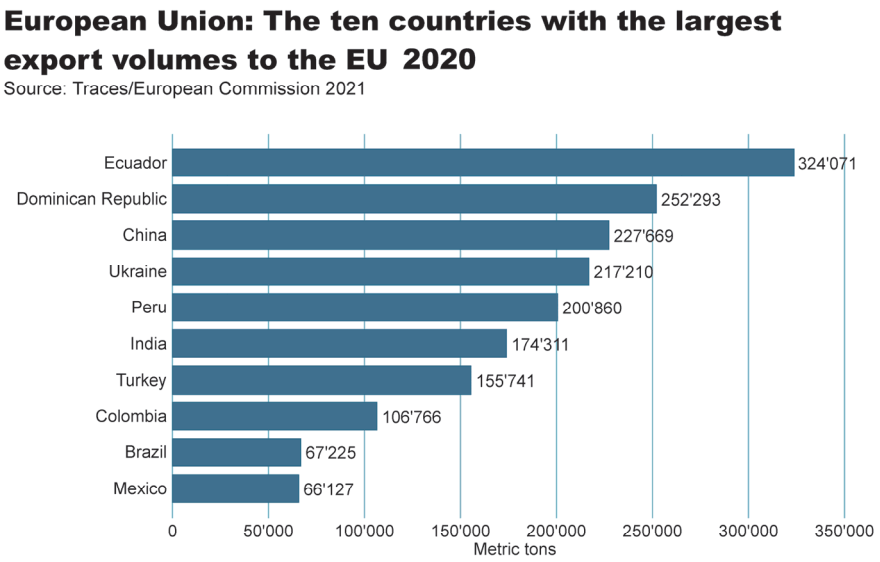


Figure 57: EU organic import volumes: Top 10 countries exporting to the European Union

Source: Traces

Imports of organic fruit and vegetables

Fruit and vegetables is the largest group of imported organic product categories, with 1.29 million MT imported in 2020 (46 percent of total organic imports). The largest share is composed of tropical fruit, nuts and spices (65 percent of organic fruit and vegetables), which include mainly bananas (81 percent of tropical fruit) (Table 42).

Imports of tropical fruit, nuts and spices in 2020 increased strongly to 0.84 million MT (+9 percent). Citrus (+31 percent) and other organic fruit (+7 percent) imports also increased, while imports of vegetables and preparations were stable. Only imports of organic fruitjuices decreased in 2020 (-11 percent).

Table 42: Organic fruit and vegetables import volumes by product category, 2019 and 2020

Category	2019 imports [1000 MT]	2020 imports [1000 MT]	Change [%]
Tropical fruit, fresh or dried, nuts and spices	772	843	9.2
of which bananas	*640*	*679*	*6.1*
Vegetables, fresh, chilled and dried	146	147	0.7
of which dried leguminous	*56*	*75*	*34.2*
of which potatoes	*25*	*23*	*-6.5*
of which onions, shallots and garlic	*25*	*13*	*-46.3*
Fruit, fresh or dried, excl. citrus & tropicalfruit	123	132	7.4
of which apples andpears	*31*	*30*	*-3.1*
of which grapes	*20*	*22*	*9.3*
Fruit juices	85	76	-10.5
of which orange juice	*30*	*30*	*0.1*
of which apple juice	*23*	*18*	*-23.7*
Preparations of fruit, vegetables or nuts	55	56	2.5
of which preparationsof fruit	*43*	*45*	*3.6*
Citrus fruit	28	37	31.3
of which lemons	*15*	*21*	*40.6*
of which oranges	*7*	*10*	*51.9*
Total	**1'210**	**1'292**	**6.8**

Source: Traces

Almost one-sixth of imported olive oil is estimated to be organic. Organic imports are estimated to represent a significant share of total imports for some product categories. In particular, for olive oil, almost one-sixth of imports are estimated to be organic. For flours and sugar, organic imports represent more than 10 percent of total imports, but for the large majority, they represent less than 5 percent, and they are close to or at zero percent for the majority of meat product categories. Overall, organic agri-food imports are estimated to represent about 2 percent of the total volume of agri-food imports.

Organic tropical fruit, nuts and spices are imported mainly from Ecuador (35 percent of the total, equal to 0.3 million MT), Dominican Republic (26 percent) and Peru (15 percent). Almost half of the imported organic citrus fruit originates from South Africa

(43 percent), while other organic fruits come from mainly from Turkey (25 percent), Argentina (15 percent) and Ukraine (12 percent). More than half of organic fruit juices imported come from Turkey (28 percent) and Mexico (25 percent). Middle Eastern countries are the main origin of organic vegetables, including Turkey (34 percent) and Egypt (31 percent). Regarding preparations of vegetables, fruit or nuts, Ecuador (20 percent) was the leading supplier.

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

Around 40 percent of the imported organic products pertainto the arable crop product categories or their derivatives (1.1 million MT). Half of these imports are made of oilseeds, oilcakes and vegetable oils, with the largest category being oilcakes (mainly soybean meals, which are an important feed component for EU livestock production, particularly for organic pig and poultry production). A further 0.3 million MT is composed of cereals (rice, maize and wheat) and flours. The remaining 20 percent is sugar (0.23 million MT) (Table 43). Imports of organic oilseeds and derivative products decreased by about 11 percent in 2020, mainly due tosmaller quantities of soybean meal and sunflower seeds. For cereals, organic imports showed an even bigger decline (-23 percent), which was particularly notablefor maize and wheat. Sugar imports also declined by 9 percent.

Table 43: Organic cereals, oilseeds and sugar import volumes for key product categories, 2019and 2020

Category	2019 imports [1000 MT]	2020 imports [1000 MT]	Change [%]
Oilcakes	298	232	-22.2
of which soybean meals	288	223	-22.5
Beet and cane sugar	210	190	-9.7
Soybeans	130	137	5.4
Oilseeds, other thansoybeans	156	137	-12.3
of which sunflower	*58*	*29*	*-49.7*
of which linseed	*27*	*28*	*2.3*
of which rapeseed	*22*	*22*	*1.6*
of which sesame seed	*19*	*22*	*16.0*
Cereals, other than wheatand rice	189	111	-40.9
of which maize	*165*	*89*	*-46.2*
Rice	70	93	33.1
Wheat	131	86	-34.4
Palm & palm kernel oils	39	43	12.9
Sugar, other than beet &cane	40	39	-2.7
Flours and other productsof the milling industry	18	22	24.0
Vegetable oils other than palm & olive oils	13	17	34.9
Total	**1'293**	**1'108**	**-14.3**

Source: Traces

[1] The analysis covers only the largest product categories listed in Table 3. 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.

With regard to oilseeds, important origins include China, Ukraine and India, as well as Togo for soybeans and Turkey for other oilseeds. The decline in imports of oilcakes in 2020 was caused by a sharp reduction of imports from China (-47 percent), the main supplier. Similarly, imports of maize and wheat fell substantially because of a significant reduction of volumes coming from Ukraine (-44 percent) and Kazakhstan (-96 percent). In organic sugar, Colombia became the main supplier after a 50 percent increase in exports, but imports from other main suppliers, like Brazil (-30 percent), India (-38 percent) and Paraguay (-29 percent), fell sharply. On the other hand, imports of organic rice in 2020 increased as the leading suppliers provided extra volumes (Pakistan +54 percent, India +36 percent, Thailand +23 percent and Argentina +41 percent).

Unroasted coffee is largely imported from Peru and Honduras: together, they represent 61 percent of the exporting countries under this category (respectively, 31 percent and 30 percent). Cocoa beans come from Dominican Republic (37 percent), Sierra Leone (24 percent) and Peru (13 percent). Organic olive oil for the EU comes almost exclusively from Tunisia. Chile (43 percent) and Argentina (37 percent) are the leading suppliers of organic wine to the EU, and further quantities are imported mainly from South Africa, Australia, New Zealand and the USA.

Imports of organic permanent crops (excluding fruit and nuts)

Besides organic fruit and nuts, a further 0.28 million metric tons of organic permanent crops (and their derivatives) were imported in 2020. This includes in particular unroasted coffee, tea in bulk and maté (49 percent of permanent crops), of which 95 percent is unroasted coffee, as well as cocoa beans (27 percent) and olive oil (17 percent). Imports of all product categories of permanent crops increased in 2020, most notably for olive oil (+41 percent), with a combined growth of 13 percent compared to 2019 (Table 44).

Table 44: Organic permanent crops (excl. fruit and nuts) import volumes by product category, 2019 and 2020

Category	2019 imports [1000 MT]	2020 imports [1000 MT]	Change [%]
Unroasted coffee, tea in bulk & maté	132	138	4.7
of which coffee	123	131	6.7
Cocoa beans	65	76	16.1
Olive oil	34	47	40.5
Wine, vermouth, cider and vinegar	16.2	17.0	5.1
of which wine	15.9	16.7	4.6
Roasted coffee and tea	0.8	1.9	148
Total	**248**	**281**	**13.0**

Source: Traces

Imports of organic animal products

Honey was the main imported organic animal product; imports in 2020 declined by around 7 percent due to lower imports from China and Mexico - despite an increase from Brazil.

Imports of other organic animal products in the EU are small and in 2020 amounted together to just over 500 metric tons. Bovine and sheep meat, as well as non-edible animal products, were imported mainly from the Mercosur, while very small amounts of dairy products (cheese and yoghurt) were shipped from the US (Table 45).

Table 45: Organic animal product import volumes byproduct category, 2019 and 2020

Category	2019 imports [MT]	2020 imports [MT]	Change [%]
Eggs and honey	16'032	14'490	-6.8
of which honey	15'901	14'737	-7.3
Bovine meat, fresh, chilled and frozen	486	275	-43.3
Non-edible animal products	233	237	1.4
Sheep and goat meat, fresh, chilled and frozen	0.5	18	3'810
Cheese	1.2	2.6	121
Fresh milk and cream, buttermilk and yoghurt	-	1.2	N/A
Total	**16'753**	**15'474**	**-7.6**

Source: Traces

EU Organic Imports: Tables

Table 46: Organic import volumes by exporting country, 2019 and 2020

Rank	Exporting countries/ territories	2019 imports [MT]	2020 imports [MT]	Change [%]	Share of total 2020 [%]	Cumulated share 2020 [%]
1	Ecuador	299'971	324'071	8.0	11.6	11.6
2	Dominican Republic	229'218	252'293	10.1	9.0	20.6
3	China	359 057	227'669	-36.6	8.1	28.8
4	Ukraine	282'427	217'210	-23.1	7.8	36.5
5	Peru	207'938	200 860	-3.4	7.2	43.7
6	India	152'678	174'311	14.2	6.2	50.0
7	Turkey	173'026	155'741	-10.0	5.6	55.6
8	Colombia	79'167	106'766	34.9	3.8	59.4
9	Brazil	75'676	67'225	-11.2	2.4	61.8
10	Mexico	67'427	66'127	-1.9	2.4	64.1
11	Tunisia	42'519	58'516	37.6	2.1	66.2
12	Argentina	59'456	56'361	-5.2	2.0	68.3
13	Togo	44'684	54'017	20.9	1.9	70.2
14	Egypt	53'233	51'292	-3.6	1.8	72.0
15	Pakistan	33'432	44'942	34.4	1.6	73.6
16	Honduras	35'961	41'800	16.2	1.5	75.1
17	Kazakhstan	58'785	40 692	-30.8	1.5	76.6
18	Sri Lanka	29'198	37'166	27.3	1.3	77.9
19	Cote D'Ivoire	23'487	35'475	51.0	1.3	79.2
20	Canada	28'457	33'350	17.2	1.2	80.4
21	Paraguay	37'991	32'224	-15.2	1.2	81.5
22	Russian Federation	23'279	31'971	37.3	1.1	82.7
23	Thailand	29'367	29'697	1.1	1.1	83.7
24	South Africa	21'713	27'860	28.3	1.0	84.7
25	Chile	21'169	27'475	29.8	1.0	85.7
26	Philippines	23'860	26'115	9.5	0.9	86.7
27	Uganda	16'020	23'317	45.5	0.8	87.5
28	Israel	37'359	22'772	-39.0	0.8	88.3
29	Moldova, Republic Of	39'883	22'321	-44.0	0.8	89.1
30	Ghana	19'313	19'730	2.2	0.7	89.8
31	Sierra Leone	11'535	18'288	58.5	0.7	90.5
32	Morocco	20 720	18'197	-12.2	0.7	91.1
33	Burkina Faso	13'242	16'631	25.6	0.6	91.7
34	Ethiopia	14'074	15'972	13.5	0.6	92.3
35	Serbia	18'024	15'770	-12.5	0.6	92.8
36	United States	14'432	15'475	7.2	0.6	93.4
37	Lao People's Democratic Republic	5'868	14'945	154.7	0.5	93.9
38	Bolivia	13'018	14'471	11.2	0.5	94.5
39	New Zealand	13'994	14'322	2.3	0.5	95.0
40	Viet Nam	10 946	13'441	22.8	0.5	95.4
41	Costa Rica	14'765	11'935	-19.2	0.4	95.9
42	Congo, Democratic Republic Of	7'427	11'615	56.4	0.4	96.3
43	Cambodia	9'480	9'861	4.0	0.4	96.6
44	Kenya	4'468	9'466	111.9	0.3	97.0
45	Indonesia	5'962	9'231	54.8	0.3	97.3
46	Benin	2'081	7'877	278.5	0.3	97.6
47	Madagascar	5'337	6'796	27.3	0.2	97.8
48	Nicaragua	5'051	5'309	5.1	0.2	98.0
49	Sudan	2'187	4'611	110.9	0.2	98.2
50	Mozambique	1'143	4'209	268.2	0.2	98.3
51	Tanzania, United Republic Of	3'445	3'908	13.4	0.1	98.5
52	Mali	2'936	3'768	28.3	0.1	98.6
53	Japan	2'879	3'522	22.3	0.1	98.7
54	Sao Tome And Principe	1'508	2'970	97.0	0.1	98.8
55	Senegal	4'425	2'400	-45.8	0.1	98.9
56	Guatemala	2'394	2'309	-3.6	0.1	99.0
57	Algeria	1'442	2'156	49.5	0.1	99.1
58	Iran, Islamic Republic Of	1'867	1'873	0.4	0.1	99.2
59	Albania	1'863	1'825	-2.0	0.1	99.2
60	Australia	1'763	1'678	-4.8	0.1	99.3
61	Azerbaijan	1'314	1'553	18.2	0.1	99.3

Rank	Exporting countries/ territories	2019 imports [MT]	2020 imports [MT]	Change [%]	Share of total 2020 [%]	Cumulated share 2020 [%]
62	Bosnia and Herzegovina	1'521	1'540	1.2	0.1	99.4
63	Belarus	940	1'536	63.4	0.1	99.5
64	Papua New Guinea	1'290	1'536	19.1	0.1	99.5
65	Cuba	8'731	1'214	-86.1	0.0	99.6
66	Uzbekistan	779	918	17.9	0.0	99.6
67	Uruguay	960	878	-8.6	0.0	99.6
68	Palestinian Territory, Occupied	632	866	37.0	0.0	99.6
69	Rwanda	1'128	684	-39.4	0.0	99.7
70	Kyrgyzstan	328	632	93.0	0.0	99.7
71	Panama	609	632	3.7	0.0	99.7
72	Georgia	441	591	34.0	0.0	99.7
73	Niger	640	580	-9.4	0.0	99.8
74	Singapore	2	541	35492.1	0.0	99.8
75	Maldives	187	518	177.1	0.0	99.8
76	Guyana	489	495	1.3	0.0	99.8
77	Lesotho	430	489	13.8	0.0	99.8
78	Guinea-Bissau	5	379	7851.3	0.0	99.8
79	Kosovo	489	361	-26.2	0.0	99.9
80	Haiti	216	346	60.1	0.0	99.9
81	North Macedonia	413	345	-16.5	0.0	99.9
82	United Arab Emirates	62	343	454.8	0.0	99.9
83	Chad	580	322	-44.5	0.0	99.9
84	Nigeria	289	320	11.0	0.0	99.9
85	Zimbabwe	143	236	64.9	0.0	99.9
86	Saudi Arabia	86	223	160.4	0.0	99.9
87	Cameroon	304	183	-39.9	0.0	99.9
88	El Salvador	132	172	30.2	0.0	99.9
89	Armenia	54	148	173.5	0.0	100.0
90	Nepal	130	146	12.8	0.0	100.0
91	Bangladesh	113	126	11.4	0.0	100.0
92	Malaysia	24	105	343.3	0.0	100.0
93	Namibia	126	102	-19.2	0.0	100.0
94	Samoa	115	97	-15.6	0.0	100.0
95	French Polynesia	142	93	-34.4	0.0	100.0
96	Korea, Republic Of	212	88	-58.2	0.0	100.0
97	Suriname	36	85	136.2	0.0	100.0
98	Taiwan	28	62	120.2	0.0	100.0
99	Burundi	115	58	-49.5	0.0	100.0
100	Montenegro	21	56	162.2	0.0	100.0
101	Myanmar	150	50	-66.9	0.0	100.0
102	Fiji	16	37	139.3	0.0	100.0
103	Somalia	32	32	2.9	0.0	100.0
104	Solomon Islands	0	31	N/A	0.0	100.0
105	Zambia	49	29	-39.3	0.0	100.0
106	Vanuatu	42	24	-42.9	0.0	100.0
107	Comoros	52	23	-54.7	0.0	100.0
108	Lebanon	12	16	35.3	0.0	100.0
109	Guinea	18	16	-12.6	0.0	100.0
110	Belize	28	13	-54.7	0.0	100.0
111	Eswatini	0	11	N/A	0.0	100.0
112	Seychelles	24	7	-70.8	0.0	100.0
113	Angola	0	5	N/A	0.0	100.0
114	Jordan	5	4	-17.5	0.0	100.0
115	St. Pierre And Miquelon	0	2	N/A	0.0	100.0
116	Mauritius	3	1	-57.8	0.0	100.0
117	Dominica	0	1	N/A	0.0	100.0
118	New Caledonia	0	0	-68.4	0.0	100.0
119	Afghanistan	0	0	500.0	0.0	100.0
120	Botswana	3	0	-100.0	0.0	100.0
121	Gambia	2	0	-100.0	0.0	100.0
122	Oman	0	0	-100.0	0.0	100.0
123	Grenada	3	0	-100.0	0.0	100.0
124	United Kingdom	N/A	N/A			
	Total	**2'848'716**	**2'794'103**	**-1.9**		

Source: Traces

Table 47: EU organic imports: Organic import volumes by product category, 2019 and 2020

Rank	Product categories	2019 imports [1000 MT]	2020 imports [1000 MT]	Change [%]	Share of total 2020 [%]	Cumulated share 2020 [%]	2019 imports [1000 MT]
1	Tropical fruit, nuts and spices	772'391	843'237	9.2	30.2	30.2	*10*
2	Oilcakes	298'120	231'797	-22.2	8.3	38.5	*1*
3	Beet and cane sugar	210'206	189'831	-9.7	6.8	45.3	*11*
4	Vegetables	146'453	147'425	0.7	5.3	50.5	*3*
5	Unroasted coffee, tea & maté	132'192	138'423	4.7	5.0	55.5	*5*
6	Soybeans	130'259	137'308	5.4	4.9	60.4	*1*
7	Oilseeds, other than soybeans	156' 304	137'102	-12.3	4.9	65.3	*2*
8	Fruit, excluding citrus & tropicalfruit	122'814	131'934	7.4	4.7	70.0	*4*
9	Cereals, excluding wheat and rice	188'554	111'371	-40.9	4.0	74.0	*1*
10	Rice	69'771	92'887	33.1	3.3	77.4	*5*
11	Wheat	130'661	85'717	-34.4	3.1	80.4	*2*
12	Fruit juices	85'013	76'052	-10.5	2.7	83.1	*4*
13	Cocoa beans	65'495	76'029	16.1	2.7	85.9	*4*
14	Preparations of vegetables, fruitor nuts	54'963	56'319	2.5	2.0	87.9	*3*
15	Olive oil	33'581	47'196	40.5	1.7	89.6	*16*
16	Palm & palm kernel oils	38'509	43'461	12.9	1.6	91.1	*1*
17	Sugar, other than beet & cane	39'878	38'818	-2.7	1.4	92.5	*3*
18	Citrus fruit	27'986	36'734	31.3	1.3	93.8	*2*
19	Food preparations, not specified	20'432	29'304	43.4	1.0	94.9	*7*
20	Flours and other products of themilling industry	17'977	22'291	24.0	0.8	95.7	*15*
21	Vegetable oils other than palm &olive oils	12'852	17'336	34.9	0.6	96.3	*0*
22	Wine, vermouth, cider and vinegar	16'167	16 992	5.1	0.6	96.9	*2*
23	Bulbs, roots and live plants	12'964	15'008	15.8	0.5	97.4	*6*
24	Eggs and honey	16'032	14'940	-6.8	0.5	98.0	*8*
25	Miscellaneous seeds and hopcones	8'808	8'344	-5.3	0.3	98.3	*9*
26	FISH	6'826	8'064	18.1	0.3	98.6	*N/A*
27	Gums, resins and plant extracts	4'887	7'258	48.5	0.3	98.8	*3*
28	Soups and sauces	4'345	5'745	32.2	0.2	99.0	*2*
29	Infant food and other cereals, flour, starch or milk preparations	3'540	4'886	38.0	0.2	99.2	*2*
30	Starches, inulin & gluten	3'768	4'499	19.4	0.2	99.4	*3*
31	Pasta, pastry, biscuits and bread	2'334	3'159	35.3	0.1	99.5	*0*
32	Other feed and feed ingredients	1'869	2'222	18.9	0.1	99.6	*0*
33	Cocoa paste and powder	1'919	1'971	2.7	0.1	99.6	*0*
34	Roasted coffee and tea	757	1'876	147.8	0.1	99.7	*2*
35	NON AGRI	1'532	1'729	12.9	0.1	99.8	*N/A*
36	Essential oils	1'179	1'561	32.4	0.1	99.8	*4*
37	Waters and soft drinks	1'938	1'478	-23.7	0.1	99.9	*0*
38	Pet food	3'031	706	-76.7	0.0	99.9	*0*
39	Sugar alcohols	430	674	56.7	0.0	99.9	*1*
40	Ethanol	352	492	39.8	0.0	99.9	*0*
41	Casein, other albuminoidal sub. &mod. starches	0	413	N/A	0.0	99.9	*0*
42	Coffee and tea extracts	306	326	6.6	0.0	100.0	*0*
43	Chocolate, confectionery and icecream	283	300	5.9	0.0	100.0	*0*
44	Bovine meat, fresh, chilled andfrozen	486	275	-43.3	0.0	100.0	*0*
45	Non-edible animal products	233	237	1.4	0.0	100.0	*0*
46	Spirits and liqueurs	224	157	-30.0	0.0	100.0	*0*
47	Fatty acids and waxes	82	149	81.2	0.0	100.0	*0*
48	Odoriferous substances	0	45	28'031.3	0.0	100.0	*4*
49	Sheep and goat meat, fresh, chilled and frozen	0	18	3'809.9	0.0	100.0	*0*
50	Cut flowers and plants	9	3	-70.4	0.0	100.0	*0*
51	Cheese	1	3	120.9	0.0	100.0	*0*
52	Fresh milk and cream, buttermilkand yoghurt	0	1	N/A	0.0	100.0	*0*
	Total	**2'848'716**	**2'794'103**	**-1.9**			**2**

Source: Traces

Standards and Legislation Policy Support

Worldwide Overview of Policies and Regulations on Agroecological Approaches, Including Organic

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Introduction

A growing number of governments worldwide support the development of agroecological policies by designing new initiatives and programmes that help achieve the set goals. On the other hand, there are more ambitious governments that have announced and launched policies aiming at a complete transition to organic agriculture.

Table 48: Organic regulations worldwide by region

Region	Status of Legislation	Number of countries/ territories
Africa	Fully Implemented	1
	Not fully Implemented	4
	Drafting	5
Africa total		10
Asia	Fully Implemented	11
	Not fully Implemented	9
	Drafting	6
Asia total		*26*
Europe	Fully Implemented	42
	Not fully Implemented	4
Europe total		*46*
Latin America and the Caribbean	Fully Implemented	16
	Not fully Implemented	3
	Drafting	2
Latin America and the Caribbean total		*21*
North America	Fully Implemented	2
Oceania	Fully Implemented	4

Source: IFOAM survey 2022

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In terms of regulations, according to the latest data collected by IFOAM – Organics International in 2021, there are 76 countries with a fully implemented regulation on organic agriculture. A total of 20 countries have organic regulations that are not fully implemented, and 13 are drafting legislation (Table 48, Table 49). Countries going through significant revisions include the European Union and New Zealand. Additionally, some countries in Latin America are proposing amendments to their existing organic regulations.

Policies fostering agroecology and organic agriculture

Madagascar

In Madagascar, the first law on organic agriculture was promulgated in 2020. Based on this work, the first National Strategy for Organic Agriculture (SNABIO) will soon be adopted. Madagascar's ambition is to establish a policy to support organic farming for both export and the domestic market, with the aim of democratising access to healthy and sustainably produced food and leveraging all the benefits of this. These include a fair and stable income for producers, preservation of human health (farmers and consumers), a source of foreign currency for the country, conservation of ecosystems and natural resources, agricultural practices adapted to climate change and rural development. The main focus of the law and the SNABIO is supporting the growth of exports, promoting the development of the national market, and guaranteeing the organic nature of products without hindering the sector's growth. The next steps will be to put the policy and its regulatory features into practice by developing supporting tools, launching pilot projects, and further financial support from donors.

Nicaragua

In 2011, Nicaragua enacted the Law on Agroecological and Organic Production (Law 765), which sets standards for agroecological production and allows municipalities to enact local ordinances to promote agroecology. However, the law's implementation has been stalled for years because the institutions provided for in the law have not been funded and are not functional. Therefore, these policies remain fragile, while support for large-scale conventional agriculture remains prevalent.

Eight years later, the Government of Nicaragua requested FAO's support to revise and update the Agroecological Production Promotion Policy in Nicaragua under the leadership of the Ministry of Agriculture. The policy was updated and formulated with the participation of several key partners at national and international levels. An implementation plan was also developed to get the policy off the ground, setting priorities for the strategic and technical actions to be implemented. Finally, the "Agroecological Family Farming" investment project was formulated as a post-COVID-19 agricultural and food strategy in Nicaragua, which will accelerate the implementation of the priority activities of the policy implementation plan.

The Philippines

The Organic Agriculture Act of 2010 mandated the development and promotion of organic agriculture in the Philippines. Benefits and incentives specified in the act

include funding for organic agriculture practitioners, research and development, establishing a trading post and inclusion of organic agriculture in the educational curriculum. The National Organic Agriculture Program (NOAP) was then launched in 2012 to promote organic agriculture in the country. NOAP gave the Local Government Units (LGUs) the primary role of implementing the program at the municipality, city and provincial levels. Policy instruments introduced by several LGUs institutionalised support for organic agriculture, paving the way for the allocation of resources and the creation of enabling structures.

On 23 December 2020, an amendment to the Organic Agriculture Act, which had a particular focus on participatory guarantee systems (PGS), was signed into law, recognising the crucial role of smallholders in providing safe, affordable and accessible food.

A next step in reinforcing PGS should be to secure appropriate support for production, processing, the prioritisation of local distribution and marketing. The lack of policies that would ensure the protection of the environment and stop land-use conversion and a genuine agrarian reform continue to impede the implementation of the law.

Burkina Faso

In Burkina Faso, the Ministry of Agriculture, Hydro-Agricultural Development and Mechanisation is leading the development of a national strategy for agroecology and an accompanying action plan. The strategy has emerged from consultations with various actors of different sectors in the country. A commonly-defined objective is to support a consistent vision to make agroecology the engine of ecological, sustainable, competitive agro-sylvo-pastoral production, creating jobs and ensuring food security for all. A recent assessment led by FAO on agroecology in Burkina Faso identified three key strengths: the political will, the dynamism and commitment of civil society and the development of technologies and approaches by grassroots actors.

In parallel, a new version of the national programme for the rural sector (PNSR 3) is also in progress. This programme is planned to be the main federal strategy and action plan for sectoral policies, including agriculture, food security, value chains, land management and water management. Synergies between the national strategy for the development of agroecology and the PNSR 3 are to be explored. This will offer a unique opportunity to align the structural investment in the productive sectors with agroecological principles.

India

In India, natural farming is promoted as Bharatiya Prakritik Krishi Paddhati Programme (BPKP) under a centrally sponsored scheme - Paramparagat Krishi Vikas Yojana (PKVY). BPKP is aimed at promoting traditional indigenous practices which reduce externally purchased inputs. It is based mainly on on-farm biomass recycling with major stress on biomass mulching, using on-farm cow dung-urine formulations, periodic soil aeration, and excluding all synthetic chemical inputs.

The BPKP programme has been adopted in the following states: Andhra Pradesh, Gujarat, Himachal Pradesh, Karnataka, Kerala and Uttar Pradesh. Information on the

programmes' introduction and implementation is not published widely yet; some details of programmes in these two states are shared below.

Andhra Pradesh

Andhra Pradesh is the first Indian state to launch a transition plan for 6 million farmers to adopt "Community Managed Natural Farming". This would mean achieving 100% natural and chemical-free agriculture by 2030, with more than 2 billion US dollars investments. The ambitious programme aspires to provide a model for an inclusive development of agriculture that considers the diversity of people along with agro-climatic conditions and can be adapted to different global contexts to reduce vulnerabilities to climate change.

In addition, the Andhra Pradesh government is drafting the first policy on organic agriculture to support and promote it across the state more extensively, with the primary objective of ensuring healthier diets and doubling farmers' incomes.

Himachal Pradesh

After the launch of the PKVY scheme in 2015, the special programme BPKP was launched in 2020-21 to develop sustainable models of agriculture, including natural and organic farming, with the rationale that these farming methods hold the most relevance for Himalayan states like Himachal Pradesh. Farmers in mountainous states are resource-poor, landholdings are small and fragmented, and they are leaving farming due to ever enhancing cost of cultivation.

The state has set an ambitious target of converting all its 961'000 farmer families to natural farming systematically and phase-wise, with useful innovations from the farmers.

As of November 2021, over 160 thousand farmers reported actively practising *Natural Farming* techniques on around 9'000 hectares of land, covering 93 percent of all village communities.

Uganda

Uganda's Ministry of Agriculture, Animal Industry and Fisheries (MAAIF) launched the National Organic Agriculture Policy (NOAP) in 2019. Since then, steps have been taken towards implementing the NOAP by consolidating a roadmap that prioritises scaling up agroecology and organic at the farm level, supply chain and market development and strengthening the policy framework and the stakeholder platform built. Finally, the roadmap identifies actions to mobilise development partners in supporting and financing the implementation of the NOAP. In addition, the NOAP asks partner nations to integrate organic agriculture into their national strategic frameworks and assist in policy and technical issues as well as in the design, implementation, management and financing aspects of organic programmes.

Pathways towards 100% organic

Sri Lanka

In 2019, Sri Lanka's president announced the intention to gradually shift the country to farming practices to be exclusively organic.

While the government has structured the steps of the transition to organic farming as a political action to promote healthier farming practices and environmental sustainability, the country is facing an economic and social crisis due to the COVID-19 pandemic.

In March 2021, the government released the National Agriculture Policy proposing a shift to organic fertilisers from 1 to 30 percent in three years. Not more than two months later, however, the Cabinet approved a ban on the import of chemical fertilisers and pesticides, and a Presidential Task Force was formed in May to plan for the transition to organic. At the time of the decision, neither farmers nor extension service providers were trained in producing organically, and organic fertilisers were not available in sufficient quantities in the country. In addition to this, Sri Lanka was hit by extremely bad weather during the same growing season, and a food crisis has been triggered by the ongoing economic crisis and the depleting foreign exchange reserves.

Following an upheaval in the country due to the food crisis, the ban on agricultural chemical inputs imports was lifted completely in November 2021. Nevertheless, both the president and the agriculture minister repeatedly stressed that there is no change in the country's agriculture policy, subsidies will only be given to organic farming, and only organic fertilisers will be distributed.

Togo

The Government of Togo published their National Development Plan in 2018 (2018-2022 with a vision to 2030), which includes provisions for the development of the organic sector in the country. In 2019, the Ministry of Agriculture, Animal Production and Fisheries (MAPAH) published a "concept note for the national conversion of the agricultural sector to organic" outlining the programme's key elements. Within this context, in 2020, MAPAH published the national strategy for developing organic and ecological agriculture for the period 2020-2030. These documents indicate a political will to support organic agriculture with the primary objective of exporting but also building the domestic market.

Bhutan

In 2012, Bhutan was announced as the first country to fully convert to organic agriculture. The National Organic Flagship Programme of the Ministry of Agriculture and Forestry (MOAF), which was launched in 2019 to accelerate and stimulate the organic sector, has supported people in organic crop production, farmer capacity building and extension, processing and marketing within the country and is in the process of preparing export trials. Buckwheat, ginger, turmeric and quinoa are the main organic products supported by the government. Priority is also given to producing inputs such as organic fertilisers, organic seeds and organic animal feed.

To facilitate domestic market and export readiness, organic certification is fully supported by MOAF. On the one hand, the government is working with the European Union (EU), India and Association of Southeast Asian Nations (ASEAN) partners to build capacity and bridge the gap in organic certification, and on the other hand, the Local Organic Assurance System (LOAS) is being implemented for the organic domestic market. Organic outlets are also receiving support from MOAF to promote their marketing. Bhutan has prepared a low-emission development food security document to promote organic farming as a means to reduce emissions.

Karnali province in Nepal

In April 2018, the Karnali Provincial Government promulgated a Policy and Development Programme (2018- 2019) outlining the gradual transformation of the area into a fully organic province. This has been built on the experience of the Jumla district in Karnali, which declared the district organic in 2007 and consequently banned the import and use of chemical fertilisers and pesticides.

In 2020, the federal government formed a high-level task force and developed a guideline for promoting organic agriculture in Nepal.

Peru: the Huancavelica Orgánica Programme

Driven by a high level of food insecurity, Huancavelica - a monetary-deprived but agrobiodiverse region in the high south-central Peruvian Andes - initiated the Huancavelica Organica Program in 2020. The initiative, directly led by the Regional Governor, aims at improving access to support services for organic agricultural production development. Operationally, the intervention seeks to boost several value chains with strategic economic potential, among them avocado, quinoa, corn and native potatoes. It targets 100 districts and over 22 thousand households. Strategically, the Program is currently promoting active capacity building, multi-stakeholder collaboration and public investment. To sustain its outcomes, Huancavelica Orgánica is complemented by interventions in early childhood development and women's empowerment.

Huancavelica Orgánica inspired the design of the Temporary Intervention "Zero hunger", a multi-sectoral initiative led mainly by the Ministries of Social Inclusion and Agriculture. In the context of the pandemic, this national policy intervention aims to reduce the current gaps of food insecurity and hunger. To fulfil its objectives, "Zero hunger" started with a territorial approach, an investment of over 120 million US dollars and a target population of one million households. As part of the process, the intervention developed a territorial governance model around economic inclusion, endorsed territorial agendas as a planning tool and designed the first result-based budget in this area.

Revisions of regulations

Europe

Regulation (EU) 2018/848 defines for the first time rules for smallholder grower group certification worldwide directly in the regulation. Certification of "groups of operators"

will become possible also in the EU. For international grower groups, there are several significant changes of certification requirements compared to previous import requirements, e.g. a new maximum group size of 2'000 members per group, a more clearly defined farm size/turnover limit for group members and more detailed requirements for the Internal Control System (ICS). Regarding the external control of grower groups by the certification body, the most important changes are that the Certification Body will need to re-inspect 5 percent of members each year, and 2 percent of members will need to be subject to sampling. Also, there are more detailed requirements for handling non-compliances and increased notification duties.

The new regulation applies from 1 January 2022. However, certification bodies in countries outside the EU ("Third Countries") have a transition period up until 31 December 2024 to change from their currently recognised "equivalent" system to one that is compliant, based on submitting a new application for recognition. It is up to the certification body to decide how quickly they implement the transition. Certified organic operators should expect that from 2023 onwards, the inspections will still start to change to the new regulatory system so that all organic operations will have valid new compliant certificates in place until the end of 2024 at the very latest. From 2025, only certificates compliant with the regulation will be accepted for EU imports.

Oceania: New Zealand

The New Zealand Government introduced the "Organic Products Bill" in February 2020. The intention is to establish a regulatory framework with the aim of developing a single national standard to cover export, domestic and imported certified products. As of November 2021, the proposed bill has passed its second reading in Parliament.

The main areas of concern are the lack of definition of organic within the bill, how domestic PGS will function through the proposed "group scheme", and the future role of certification bodies.

Peru

In June 2021, the Government passed an Organic Agriculture National Plan 2021-2030 (PLANAE 2021-2030) as an essential tool for implementing organic agriculture law at a national and municipal level.

Another significant development is that the organic law (law 29196, 2012) was amended to recognise PGS in February 2020. However, many concerns still stood from the organic movements in terms of high levels of bureaucracy required and the partial neglection of the structures and principles of PGS in the law. Discussions are now ongoing on revising the law intending to provide more flexibility to PGS and promote family farming within this guarantee system.

Standards and Equivalence

USA

In August 2020, the United States of America's National Organic Program (NOP) proposed changes to the US Department of Agriculture (USDA) organic regulation

aiming to strengthen oversight and compliance to the organic principles along the supply chain.

The main proposed changes discussed in 2021 concern the final rule on "Strengthening Organic Enforcement", which will occur in 2022. This will impact the production, handling and marketing of organic products. Grower groups requirements are also to be included in the rule.

USA - India

In early 2021, the NOP ended the organic recognition arrangement with India's Agricultural and Processed Food Products Export Development Authority (APEDA) that was in force since 2006, i.e. the accreditation of APEDA is no longer recognised. USDA decided for an 18-month transition period meaning all organic operations in India wanting to export to the United States after 12 July 2022 need a certificate issued by a USDA-accredited certifier.

Eurasian Economic Union

On 20 August 2021, all member states of the Eurasian Economic Union signed a roadmap to create a common market for organic products. Currently, all member states, including Armenia, Belarus, Kazakhstan, Kyrgyzstan and Russia, are in the process of implementing their organic regulation. Most of the standards were developed by the countries individually and show some differences. The roadmap aims to start the harmonisation process of organic standards to allow barrier-free circulation of organic products within the Union. As a main output of the roadmap, a set of recommendations to member states are to be developed by the end of 2022.

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Table 49: Organic regulations worldwide

Region	Country/Territory	Regulations on organic agriculture	PGS recognition	Remarks
Africa	Algeria	Drafting		
Africa	Angola			
Africa	Benin			
Africa	Botswana			
Africa	Burkina Faso			
Africa	Burundi			Regional voluntary standard (EAOPS)
Africa	Cameroon	Drafting		
Africa	Cape Verde			
Africa	Central African Republic			
Africa	Chad			
Africa	Comoros			
Africa	Congo, Dem. Rep.			
Africa	Congo, Rep.			
Africa	Djibouti			
Africa	Egypt	Not fully Implemented		
Africa	Equatorial Guinea			
Africa	Eritrea			
Africa	Eswatini			
Africa	Ethiopia	Not fully Implemented		
Africa	Gabon			
Africa	Gambia			
Africa	Ghana			
Africa	Guinea			
Africa	Guinea-Bissau			
Africa	Ivory Coast			
Africa	Kenya			Regional voluntary standard (EAOPS)
Africa	Lesotho			
Africa	Liberia			
Africa	Libya			
Africa	Madagascar	Not fully Implemented		PGS Recognition
Africa	Malawi			
Africa	Mali			
Africa	Mauritania			
Africa	Mauritius	Drafting		
Africa	Morocco	Not fully Implemented		
Africa	Mozambique			
Africa	Namibia			
Africa	Niger			
Africa	Nigeria			
Africa	Rwanda			Regional voluntary standard (EAOPS)
Africa	Sao Tome and Principe			
Africa	Senegal			
Africa	Seychelles			
Africa	Sierra Leone			
Africa	Somalia			
Africa	South Africa	Drafting	Yes	
Africa	South Sudan			
Africa	Sudan	Drafting		
Africa	Tanzania			Regional voluntary standard (EAOPS)
Africa	Togo			
Africa	Tunisia	Fully Implemented		
Africa	Uganda			Regional voluntary standard (EAOPS)
Africa	Zambia			
Africa	Zimbabwe			
Asia	Afghanistan			
Asia	Armenia	Not fully Implemented		
Asia	Azerbaijan	Not fully Implemented		
Asia	Bahrain			
Asia	Bangladesh	Drafting		
Asia	Bhutan	Drafting		
Asia	Brunei Darussalam			
Asia	Cambodia	Drafting		
Asia	China	Fully Implemented		
Asia	DPR Korea			
Asia	East Timor			
Asia	Hong Kong			
Asia	India	Fully Implemented		PGS Recognition
Asia	Indonesia	Fully Implemented		
Asia	Iran	Not fully Implemented		
Asia	Iraq			

Region	Country/Territory	Regulations on organic agriculture	PGS recognition	Remarks
Asia	Israel	Fully Implemented		
Asia	Japan	Fully Implemented		
Asia	Jordan	Not fully Implemented		
Asia	Kazakhstan	Not fully Implemented		
Asia	Kuwait			
Asia	Kyrgyzstan	Not fully Implemented		
Asia	Laos			
Asia	Lebanon	Fully Implemented		
Asia	Malaysia	Fully Implemented		
Asia	Maldives			
Asia	Mongolia	Fully Implemented		PGS Recognition
Asia	Myanmar			
Asia	Nepal			
Asia	Oman			
Asia	Pakistan	Drafting		
Asia	Palestine			
Asia	Philippines	Fully Implemented		PGS Recognition
Asia	Qatar			
Asia	Republic of Korea	Fully Implemented		
Asia	Saudi Arabia	Not fully implemented		
Asia	Singapore			
Asia	Sri Lanka	Drafting		
Asia	Syria			
Asia	Tajikistan	Not fully Implemented		
Asia	Thailand			
Asia	Turkmenistan			
Asia	United Arab Emirates	Fully Implemented		
Asia	Uzbekistan	Drafting		
Asia	Vietnam	Not fully Implemented		
Asia	Yemen			
Europe	Albania	Fully Implemented		
Europe	Andorra	Fully Implemented		
Europe	Austria	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Belarus	Not fully implemented		
Europe	Belgium	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Bosnia & Herzegovina	Not fully Implemented		
Europe	Bulgaria	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Croatia	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Cyprus	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Czech Republic	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Denmark	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Estonia	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Finland	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	France	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Georgia	Fully Implemented		
Europe	Germany	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Greece	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Hungary	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Iceland	Fully Implemented		
Europe	Ireland	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Italy	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Kosovo	Fully Implemented		
Europe	Latvia	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Liechtenstein	Fully Implemented		
Europe	Lithuania	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Luxemburg	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Malta	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Moldova	Fully Implemented		
Europe	Monaco			
Europe	Montenegro	Fully Implemented		

Policies and regulations

Region	Country/Territory	Regulations on organic agriculture	PGS recognition	Remarks
Europe	Netherlands	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	North Macedonia	Fully Implemented		
Europe	Norway	Fully Implemented		
Europe	Poland	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Portugal	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Romania	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Russia	Not fully Implemented		
Europe	San Marino	Fully Implemented		
Europe	Serbia	Fully Implemented		
Europe	Slovak Republic	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Slovenia	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Spain	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Sweden	Fully Implemented		Regional compulsory regulation (EU Reg)
Europe	Switzerland	Fully Implemented		
Europe	Turkey	Fully Implemented		
Europe	Ukraine	Not fully Implemented		
Europe	United Kingdom	Fully Implemented		
Latin America + Caribbean	Antigua and Barbuda			
Latin America + Caribbean	Argentina	Fully Implemented		
Latin America + Caribbean	Bahamas			
Latin America + Caribbean	Barbados			
Latin America + Caribbean	Belize			
Latin America + Caribbean	Bolivia	Fully Implemented		PGS Recognition
Latin America + Caribbean	Brazil	Fully Implemented		PGS Recognition
Latin America + Caribbean	Chile	Fully Implemented		PGS Recognition
Latin America + Caribbean	Colombia	Fully Implemented		
Latin America + Caribbean	Costa Rica	Fully Implemented		PGS Recognition
Latin America + Caribbean	Cuba	Not fully Implemented		
Latin America + Caribbean	Dominica			
Latin America + Caribbean	Dominican Republic	Fully Implemented		
Latin America + Caribbean	Ecuador	Fully Implemented		PGS Recognition
Latin America + Caribbean	El Salvador	Not fully Implemented		
Latin America + Caribbean	Grenada			
Latin America + Caribbean	Guatemala	Fully Implemented		
Latin America + Caribbean	Guyana			
Latin America + Caribbean	Haiti			
Latin America + Caribbean	Honduras	Fully Implemented		
Latin America + Caribbean	Jamaica	Drafting		
Latin America + Caribbean	Mexico	Fully Implemented		PGS Recognition
Latin America + Caribbean	Montserrat			
Latin America + Caribbean	Nicaragua	Fully Implemented		
Latin America + Caribbean	Panama	Fully Implemented		
Latin America + Caribbean	Paraguay	Fully Implemented		PGS Recognition
Latin America + Caribbean	Peru	Fully Implemented		PGS Recognition

Region	Country/Territory	Regulations on organic agriculture	PGS recognition	Remarks
Latin America + Caribbean	St. Kitts and Nevis			
Latin America + Caribbean	St. Lucia	Drafting		
Latin America + Caribbean	St. Vincent and the Grenadines			
Latin America + Caribbean	Suriname			
Latin America + Caribbean	Trinidad and Tobago			
Latin America + Caribbean	Uruguay	Fully Implemented		PGS Recognition
Latin America + Caribbean	Venezuela	Not Fully Implemented		
North America	Canada	Fully Implemented		
North America	USA	Fully Implemented		
Oceania	Australia	Fully Implemented		Only for export
Oceania	Cook Islands			Regional voluntary standard (POS)
Oceania	Fiji			Regional voluntary standard (POS)
Oceania	French Polynesia	Fully Implemented		Regional voluntary standard (POS); PGS Recognition
Oceania	Kiribati			Regional voluntary standard (POS)
Oceania	Marshall Islands			Regional voluntary standard (POS)
Oceania	Micronesia			Regional voluntary standard (POS)
Oceania	Nauru			Regional voluntary standard (POS)
Oceania	New Caledonia	Fully Implemented		Regional voluntary standard (POS); PGS Recognition
Oceania	New Zealand	Fully Implemented		Only for export
Oceania	Niue			Regional voluntary standard (POS)
Oceania	Palau			Regional voluntary standard (POS)
Oceania	Papua New Guinea			Regional voluntary standard (POS)
Oceania	Samoa			Regional voluntary standard (POS)
Oceania	Solomon Islands			Regional voluntary standard (POS)
Oceania	Tonga			Regional voluntary standard (POS)
Oceania	Tuvalu			Regional voluntary standard (POS)
Oceania	Vanuatu			Regional voluntary standard (POS)

Source: IFOAM survey 2022

Participatory Guarantee Systems in 2021

SARA ANSELMI[1] AND FLÁVIA MOURA E CASTRO[2]

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).

IFOAM – Organics International is the only organisation collecting data about PGS on a global level. During 2020 and 2021, many PGS initiatives were affected by the measures restricting contact and physical interaction, which were adopted around the globe due to the COVID-19 pandemic. Regular meetings and peer reviews could not be carried out as planned or at least not for all their members. This is partly reflected in the data reported here, as it was not possible to collect recent figures for all countries. To date,[3] we have recorded in our PGS database 242 PGS initiatives in 78 countries, with at least 1'244'239 producers involved and 1'205'050 producers certified. It is estimated that these producers manage 915'997 hectares of land.

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 1'171'224 producers are certified and manage 757'097 hectares of PGS certified area. Alongside the governmental PGS initiative, the civil society organisations gathered under the "PGS Organic Council" (PGSOC) certify a total of 4'470 producers, of which 771 are also included in the governmental program. The total of PGS certified producers in India has therefore reached the impressive figure of 1'175'674. These figures represent a continuous growth: an increase of over 7 percent in numbers of PGS certified producers and an 18 percent increase in hectares of PGS certified area in the country, even though it does not compare to that of the previous year, which saw up to 120 percent growth in terms of certified producers.

Worldwide, there are eight other countries with more than 1'000 producers certified by PGS: Brazil (8'741), Thailand (2'119), Uganda (2'044), Peru (1'790), Tanzania (1'764), Bolivia (1'287), France (1'147) and Burkina Faso (1'098).

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[3] Data collection was carried out until 30 November 2021

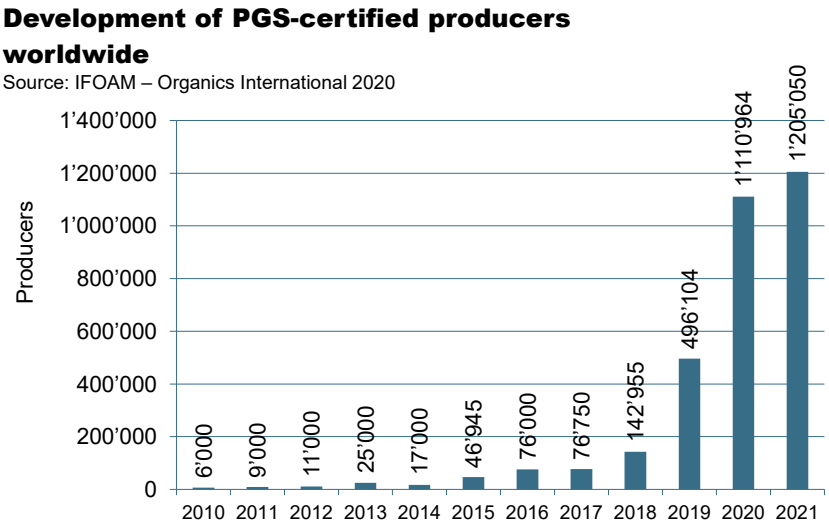


Figure 58: Development of PGS-certified producers worldwide

Source: IFOAM – Organics International

The overall trend towards increase observed in the past years (Figure 58) was maintained in 2021 in all regions, except **Europe** and **North America**, where the figures remain stable, and Oceania, which reports significant changes from previous years[1]. **Asia** has seen an increase in the number of certified farmers since 2017, primarily due to India, where this figure increased by 143 percent in 2018, 316 percent in 2019 and 120 percent in 2020. A significant increase in the total area certified through PGS in India has also been observed (+67 percent in 2020 and +18 percent in 2021)[2]. Other countries in this region that have seen a regular increase in numbers of certified producers between 2017 and 2019 are Laos (+260 percent in 2019), Myanmar (+290 percent in 2019), South Korea (+119 percent in 2019)[3]. Thailand and the Philippines contributed to the overall growth of certified producers in the past two years (+98 percent in 2020 for Thailand and +30 percent for the Philippines in 2021)[4]. **Africa** (since 2018) and **Latin America** (since 2019) have also seen steady growth in the numbers of producers and hectares under organic management certified through PGS.

In line with this trend, the interest in PGS and requests for knowledge exchange opportunities among PGS practitioners have also been increasing, with a clear request for an international gathering focusing on PGS emerging within the organic movement. In 2021 it was possible to fulfil this request: for two days in September, at least 133 PGS

[1] See more in the chapter on Oceania in this article, and in the Chapter on Oceania by Mapusua.
[2] Data available for the certified area is only from 2019 onwards.
[3] Data reported was collected in 2019.
[4] Latest data was collected via email communication with countries' stakeholders in 2021.

stakeholders and practitioners gathered online for the virtual event "30 Years of PGS Development: A Root and Branch Appraisal", organised by the French agricultural research and international cooperation organisation CIRAD, the association Nature et Progrès and IFOAM – Organics International, to discuss achievements and challenges faced by PGS initiatives throughout the world.

This was a moment to celebrate how the PGS movement has grown and accomplished since the first international "Workshop on Alternative Certification", co-organised by IFOAM - Organics International and the Agroecological Movement of Latin America and the Caribbean (MAELA) in 2004. Speakers and participants shared their reflections and questions through four plenary sessions, twelve paper presentations and nine lively roundtable discussions divided into three tracks: Diversity, Sustainability and Innovation.

According to the Final Declaration that emerged from this event, this was "a time to acknowledge the diversity of the many PGS in our international network and to recognise the maturity of the PGS movement. […] The value of PGS extends well beyond the producers who participate and includes benefits to the social, cultural, environmental and economic contexts in which they are embedded."[1]

General developments (per region)

Africa

At least 34 PGS initiatives are currently documented in Africa, reporting an increase in certified producers and a decrease in terms of involved producers compared to the previous year. Certified hectares have increased by 41 percent compared to 2020, with at least 2'238 ha of land certified. Among the initiatives, 22 are operational, and 12 are under development.

In West Africa, Burkina Faso, Ghana, Mali and Togo report an increase in PGS certified producers and hectares. 2021 was the last year of the implementation of the Organic Markets for Development (OM4D) project, which supported the development of PGS initiatives in Burkina Faso, Ghana Togo, and Sao Tomé and Principe. The data collected reflects a positive impact of the OM4D project with an increase in the total of certified producers in 2021: 5 percent for Burkina, 54 percent for Ghana compared to 2020. Togo reported the first certified producers in 2021, transitioning from 0 certified farmers in 2020 to 579 in 2021.

Asia

The region reports again an increase in numbers of producers involved and certified producers, with India at the forefront (+7 percent growth in terms of certified farmers and +18 percent of hectares compared to 2020), followed by the Philippines (+30 percent growth in terms of certified farmers and +38 percent in terms of certified hectares). Countries with many producers involved in PGS are also Thailand, Kyrgyzstan and the

[1] See more on the Declaration at: https://www.ifoam.bio/news/30-years-pgs-development-declaration-pgs-pre

Republic of Korea. Asia remains the region with the highest number of producers involved in PGS and the second one (after Latin America) in terms of operational PGS initiatives.

An important change in the legal framework for organic agriculture took place in the Philippines at the end of 2020: in December 2020, the government issued the amendment to the Organic Agriculture Act, known as RA 11511, ensuring recognition of PGS as valid guarantee systems. Since then, the 16 PGS initiatives (eight operational and eight under development) started to align their structure and systems to comply with the requirements of the amended law. Some members of the national network "PGS Pilipinas" were given orientation and training by the Regional Field Units of the Agriculture Training Institute[1]. The network has been involved in consultations by the National Organic Agriculture Program secretariat regarding PGS implementation. This country reports a 30 percent increase in terms of certified farmers and a 60 percent increase in terms of involved farmers compared to 2020 (see also chapter about organic in Asia on page 202).

Europe and North America

Europe and North America did not report any major change in 2021. The PGS Initiative Certified Naturally Grown (USA and Canada) reports a decrease of 6 percent of certified producers compared to 2020. France is the country with the highest number of PGS certified and involved farmers, with five PGS initiatives (three operational and two under development) and 1'147 certified producers[2].

Latin and Central America

Central and Latin America saw an increase of producers involved and certified producers, with a total of 13'539 certified producers and 24'504 involved producers reported in 2021. Main increases in terms of producers certified were observed in Brazil (+11 percent) and Costa Rica (+50 percent), while Chile saw a slight decrease (-4 percent) compared to 2020. Brazil keeps being the frontrunner in terms of the total number of operational PGS initiatives (28), followed by Chile (18), Peru (10), and Mexico (7).

In Peru, the government officially recognised PGS as a valid form of certification in 2020 and is now discussing with stakeholders how to continue embedding PGS in the law without imposing high levels of bureaucracy and cumbersome procedures for producers. At the same time, some municipalities are supporting organic agriculture and PGS with their policies, such as the region of Huancavelica with its "Huancavelica Orgánica" program.[3]

An important platform for discussions and knowledge sharing for PGS stakeholders in the region, the Latin American PGS Forum was relaunched in September 2021.[4]

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[1] Agency of the Department of Agriculture responsible for giving trainings. More information at: https://ati.da.gov.ph/ati-main/

[2] Data reported from France is from 2020.

[3] See more on the program in the Policies and Regulations chapter by Hysa et al.

[4] See more on PGS in Latin America in the Chapter by Flores

Oceania

The region reports 16 PGS initiatives (13 operational, 3 under development). The majority of the PGS initiatives are based in the Pacific Islands. In contrast to the positive global trend, a decrease of at least 57 percent in certified farmers and 67 percent for involved farmers was observed in 2021, compared to the previous year. Despite that, the total area certified through PGS has increased by +12 percent from 2020. It is not clear the main reasons behind these significant changes, but we expect to clarify it next year with the Global PGS Survey (for additional information, see chapter by Mapusua on The Pacific Islands on page 304 of this report).

General notes on the data

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

[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

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 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 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:

(a) **Producers involved:** Farmers and processors involved in a PGS either as certified or as not having yet received certification, including those in the process of conversion and 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 proof of certification if they are approved as part of a group within a PGS initiative.

Table 50: Participatory Guarantee Systems worldwide 2021

Country/Territory	PGS Groups [No.]	Producers certified [No.]	Producers involved [No.]	Operational PGS [No.]	PGS Under Development [No.]	PGS certified land [hectares]
Africa	**34**	**7'089**	**19832**	**22**	**12**	**2'241**
Benin	1	228	586	1		164
Burkina Faso	1	577	1098	1		166
Burundi	1		4820		1	
Cameroon	1	22	170	1		
Ethiopia	1		30		1	
Ghana	1	39	480	1		120
Guinea	1		59		1	
Ivory Coast	1		12		1	
Kenya	1	178	1337	1		
Mali	1	252	252	1		112
Mauritius	1				1	
Morocco	1	27	27	1		352
Mozambique	1	20	90	1		0
Namibia	1	4	11	1		23
Nigeria	1	706	706	1		45
Rwanda	1		315		1	
Sao Tome and Principe	1	10	40	1		3
Senegal	1	291	497	1		370
South Africa	9	333	568	7	2	407
Tanzania	1	1764	864	1		
Togo	4	579	631		4	473
Uganda	1	2044	7224	1		
Zimbabwe	1	15	15	1		6
Asia	**63**	**1'181'101**	**1'195'506**	**38**	**25**	**878'077**
Bangladesh	1	0	123		1	0
Bhutan	1	0	100		1	
Cambodia	9	112	249	4	5	22
China	3		1129		3	
India	2	1'175'674	1'181'224	2		763'539
Indonesia	1	348	477	1		91'116
Japan	1	5	8	1		1
Kyrgyzstan	1	889	3'000	1		17'997
Laos	3	310	495	2	1	773
Mongolia	1	2	26	1		
Myanmar	1	304	304	1		379
Nepal	4	39	373	3	1	65
Pakistan	1				1	
Philippines	16	530	2'622	8	8	484
South Korea	1	250	2'000	1		
Sri Lanka	2	155	756	1	1	221
Taiwan	2	60	471	2		
Thailand	7	2119	1'669	6	1	3'367
Vietnam	6	304	480	4	2	113
Europe	**31**	**1'667**	**2'070**	**17**	**14**	**4'680**
Belgium	2	80	191	1	1	
Bosnia	1		5		1	
Czech Republic	1		2		1	
France	5	1'147	1'217	3	2	400
Germany	1	38	38		1	2'670
Greece	1				1	
Hungary	2		10		2	
Italy	5	206	255	3	2	1'428

Country/Territory	PGS Groups [No.]	Producers certified [No.]	Producers involved [No.]	Operational PGS [No.]	PGS Under Development [No.]	PGS certified land [hectares]
Spain	12	196	322	10	2	92
Turkey	1	0	30		1	90
Latin America	**96**	**1'3539**	**24'504**	**88**	**8**	**10'436**
Argentina	2	20	40	1	1	170
Belize	1		5		1	
Bolivia	4	1'287	3'395	4		190
Brazil	28	8'741	9'521	28		2'564
Chile	21	253	248	18	3	908
Colombia	6	373	649	6		1'528
Costa Rica	6	65	65	6		185
Cuba	1	0	3'712		1	0
Ecuador	4	637	1'877	4		80
Guatemala	1	25	50	1		1
Mexico	9	135	284	7	2	775
Paraguay	2	78	211	2		235
Peru	10	1'790	3'947	10		3'250
Uruguay	1	135	500	1		550
North America	**2**	**613**	**710**	**1**	**1**	**8'440**
Puerto Rico	1		10		1	
United States of America	1	613	700	1		8'440
Oceania	**16**	**1'041**	**1'617**	**13**	**3**	**12'123.18**
Australia	2	14	25	1	1	2'200
Cook Islands	1	11	14	1		9.5
Fiji	6	720	819	6		9'265.32
French Polynesia	1	27	37	1		130.94
Kiribati	1		120		1	
New Caledonia	1	127	179	1		299.42
New Zealand	1	140	150	1		
Samoa	1		190		1	
Solomon Islands	1	0	76	1		50
Vanuatu	1	2	7	1		168
Total	**242**	**1'205'050**	**1'244'239**	**179**	**63**	**915'997.18**

Source: IFOAM survey

Agroecology and Organic Agriculture at the UN Food Systems Summit 2021

GÁBOR FIGECZKY[1], XHONA HYSA[2] AND ALI GÜLCEGÜN[3]

Introduction

In October 2019, the Secretary-General of the United Nations (UN) announced he would host a Food Systems Summit (UNFSS) in 2021 aiming to maximise the benefits of a food systems approach across the entire 2030 Agenda[4], meet the challenges of climate change, make food systems inclusive and support sustainable peace. This announcement marked the start of a global policy and consultative process, culminating in a presummit in July and the summit in September 2021.

Although the preparations for the summit indicated a consensus on the need for a radical reform of food systems, they also surfaced existing differences in approaching the tasks ahead. While there were no reservations towards the UNFSS from players more interested in a productivist approach, promoters of agroecology and food sovereignty became divided regarding their involvement.

The task of including all players globally in such a consultative process seemed a daunting one anyhow. At the same time, the pandemic facilitated the development of various virtual platforms, which certainly increased the diversity of voices heard during the debates.

Governance structures and mobilisation

Organisers of the UNFSS were given the task to put in place structures for a very complex process that needs to be fully inclusive, meaning there should be no direct leadership (e.g. by any specific UN agency or body) while producing outcomes within a fairly short timeframe. In the end, the ad hoc organisational structure for the summit included five thematic action tracks, a diversity of UNFSS dialogues, an advisory committee, a scientific group and a UN task force[5] – all these somewhat coordinated by a summit secretariat.

Without a clear indication of how messages and opinions shared within these different structures would feed into the outcomes of the process, the summit preparations kept

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[4] More information about the 2030 Agenda for Sustainable Development is available at https://sdgs.un.org/2030agenda

[5] More about the UN Food Systems Summit is available at https://www.un.org/en/food-systems-summit

their mostly ad hoc nature until the end, which created fatigue and disbelief for several participants already involved in similar global processes earlier.

However, it needs to be acknowledged that the UNFSS managed to engage a vast audience who have otherwise not been involved in such events. This was probably the case for the organic farmers too, whose views were also channelled into the process, particularly through the UNFSS dialogues organised by the Intercontinental Network of Organic Farmers Organisations (INOFO)[1] and IFOAM - Organics International.

More than 150 countries took part in the actual summit held entirely online in September 2021. The number of participants, exceeding 45'000 in public debates, also shows a remarkable level of mobilisation through the multiple platforms used.

Critical voices

From the outset, the summit met considerable resistance from various movements that questioned its inclusivity and equity. The appointment of the former Rwandan Minister of Agriculture, Agnes Kalibata, as special envoy for UNFSS 2021 was particularly criticised, given her role as president of the intensive agriculture-oriented foundation called Alliance for a Green Revolution in Africa (AGRA). Further suspicions that big business was dominating the agenda arose when the summit's ideas paper mentioned precision agriculture, data collection and genetic engineering as important for addressing food security – initiatives backed by big technology companies – but made no mention of agroecology and organic agriculture or the involvement of small-scale producers and civil society. The strategic partnership with the World Economic Forum did not go unnoticed, either. It was branded as a further imbalance of the interests of the same actors held responsible for the food crisis.

For these reasons, hundreds of organisations, mostly led by the Indigenous Peoples and Civil Society Mechanism[2], an autonomous body of the Committee on Food Security[3], decided to boycott the pre-summit by mobilising the Peoples' Counter-Summit to transform corporate food systems. In a letter sent to the Secretary-General, more than 550 signatory organisations denounced the corporate capture of the summit, which was allegedly placed in the hands of the large high-tech intensive agriculture multinationals. Influential food system movements and organisations such as La Via Campesina, Slow Food and Action Aid International stayed out of the process, and the International Panel of Experts on Sustainable Food Systems (IPES-Food) withdrew from all its roles in the UNFSS process during the pre-summit. Many of them

[1] INOFO is the Intercontinental Network of Organic Farmers Organisations, an autonomous structure within IFOAM - Organics International, representing organic farmers' organizations. More information is available at https://www.ifoam.bio/about-us/our-network/sector-platforms/inofo.

[2] For information about the Indigenous Peoples and Civil Society Mechanism see https://www.csm4cfs.org/

[3] More information about the Committee on World Food Security, an intergovernmental body to serve as a forum in the United Nations System for review and follow-up of policies concerning world food security including production and physical and economic access to food, can be found at https://en.wikipedia.org/wiki/Committee_on_World_Food_Security

participated in a counter-process leading to a declaration called the People's Autonomous Response to the UN Food Systems Summit.[1]

Outcomes for agroecology and organic agriculture

While some organisations decided to pull out of the UNFSS as they were concerned that transparency and inclusiveness were not being addressed, others, such as the World Wildlife Fund (WWF), IFOAM - Organics International and Biovision, decided to engage in the process with a critical eye, consistently promoting agroecology and organic farming in all the different elements of the process. Due to a large part of their work, agroecology did not get sidelined in the UNFSS process.

The agroecology narrative could clearly be captured in various papers produced by the action tracks, particularly those focusing on access to safe and nutritious food for all and boosting nature-positive production.

Agroecology and organic agriculture were also named by numerous state representatives who expressed their commitment to agroecological transition as part of their prerecorded statements, which formed the main part of the online summit event. The Swiss delegate mentioned agroecology as a "game-changing solution", while the French Minister of Agriculture clearly pointed out that "there is no food and nutrition security without an agroecological transition". Delegates from Dutch, Senegalese, and Sri Lankan Ministries of Agriculture also emphasised the importance of agroecological transformation solutions to foster transitions towards more sustainable agricultural food systems.

The most tangible result of the efforts to mainstream agroecology in the UNFSS, however, was probably the creation of a Coalition for the Transformation of Food Systems Through Agroecology and Regenerative Agriculture[2], with a mandate to ensure that agroecology and organic agriculture are seen as progressive and pioneering within the UNFSS and in any subsequent process.

Such processes are now to be coordinated by a hub led by the three Rome-based UN agencies and will include a global stock-taking meeting to be convened every two years by the Secretary-General. With more than 100 countries announcing the development of detailed national pathways, and an additional 50 making commitments at the summit[3], there are growing opportunities for the organic movements worldwide to get engaged in transformational decision-making processes aiming to meet the Sustainable Development Goals (SDGs) in the years to come.

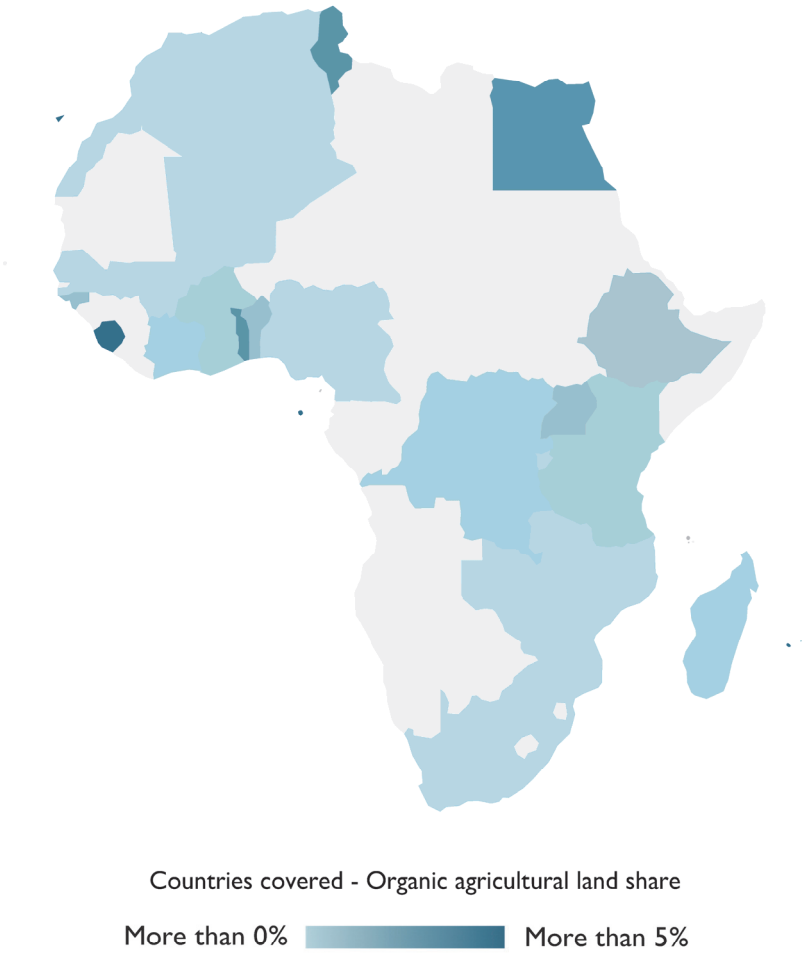
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[1] The People's Autonomous Response to the UN Food Systems Summit is available at www.foodsystems4people.org

[2] More information about the Coalition for the Transformation through Agroecology and Regenerative Agriculture is available at https://foodsystems.community/transformation-through-agroecology-and-regenerative-agriculture/

[3] Member State Dialogue Convenors and Pathways on the website of the Food Systems Summit 2021: https://summitdialogues.org/overview/member-state-food-systems-summit-dialogues/convenors/

Africa



Map 2: Organic agricultural land in the countries of Africa 2020

Developments in Organic Agriculture in Africa

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Introduction

Organic agriculture in Africa (increasingly considered ecological organic agriculture, or EOA) received much attention from farmers, practitioners, policymakers and other stakeholders during the COVID-19 pandemic. This demonstrated EOA's potential to ensure nutrition security while addressing food insecurity, land degradation, poverty, climate change and shock resilience, among other benefits.

The Ecological Organic Agriculture Initiative

Key achievements

The Ecological Organic Agriculture Initiative (EOA-I), funded by the Swiss Agency for Development and Cooperation (SDC) and the Swedish Society for Nature Conservation (SSNC), continues to reach out to smallholder farmers. Based on 2020 data (2021 data is under compilation), about 1.76 million farmers (49 percent women, 45 percent men and 5 percent youth) received information and communication materials to enhance their organic farming knowledge and uptake. Additionally, EOA-I information reached 2 percent of value chain actors (transporters, input suppliers, marketers and consumers).

After being exposed to information and communication pathways, 13'852 farmers (5'794 males, 4'036 females and 4'022 youth) adopted EOA practices. The communication pathways used included knowledge databases, training events, workshops, social media (especially YouTube, Twitter and Facebook) and other websites.

The initiative's databases continued to be strengthened to make research findings and EOA knowledge available and accessible for various users[2]. About nine EOA practices were promoted during this period, including consumption and the management of crops, livestock, soil, diseases, pests, social activity and the post-harvest stage.

Approximately 35'000 stakeholders were trained, with the majority being farmers. The multiplier approach for training teams of facilitators who then train larger

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[2] For more information see the EOA-I website http://eoai-africa.org/research

numbers of value chain actors was used. This approach saw 272 master trainers train 35'000 value chain actors.

Approximately 300 stakeholders were engaged in platform meetings, workshops, and conferences across the different EOA-I structures to discuss successes, best practices, experiences and challenges of the EOA-I. Lobbying and advocacy for the mainstreaming of EOA-I into national, regional, and continental frameworks were key activities undertaken during 2021, with various meetings held targeting key policymakers.

Farmers were reached with information from various thematic content that included nutrition and food safety, organic technologies and practices, climate change, water management, resilience and sustainability of organic farming systems, inputs and product market development and technology transfer and learning.

Value chains promoted included livestock, herbs and vegetables, tomatoes, plantains, bananas, vegetables, honey, onions, millet, pineapples, fruits, vegetables, potatoes, carrots, fruits, tomatoes, chia, sesame, pineapples and strawberries.

The period realised an increase in the number of farmers meeting organic market standards, with 12'453 participating in markets, which correlated with the establishment of 14 new markets and the revitalisation of 16 existing market channels. Forty-eight new value-added organic products were introduced to the market.

EOA-I mainstreaming was strengthened in Uganda with the launch of the National Organic Agriculture Policy, and plans were made to develop the National Agroecology scaling up strategy in collaboration with the Ministry of Agriculture, Animal Industry, and Fisheries.

To assess the extent of the implementation of this decision at the African Union Member States level, the African Union (AU) commissioned a study in 2019 on the policy, legal, and institutional development of EOA in Africa. This study revealed that only four countries (Morocco, Tunisia, Madagascar and Uganda) had an advanced EOA sector; 11 countries had an active EOA sector, and 12 other countries were classified as having an infant EOA sector. In addition, 10 countries were described as having a nascent EOA awareness. The remaining 18 countries are waiting for inspiration to adopt EOA.

Much of Africa's development budget is spent on Farm Input Support Programmes (FISPs) that focus on cheap fertilisers, hybrid seeds, agrochemical inputs and food safety nets. These FISP strategies, however, are not sustainable. They are also ineffective and lead to a waste of resources. However, with a long-term vision, some elements of the FISP approach can contribute to sustainable development. Mauritius is the only African country to have optimised elements of FISP to support compost making,

leading to long-term soil fertility improvement and elongating the soil's production capacity while 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 management, the soil's productivity can be increased robustly, improving soil water- and nutrient-holding capacity.

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

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

The Knowledge Centre for Organic Agriculture in Africa

The Knowledge Centre for Organic Agriculture in Africa (KCOA) is part of the BMZ[1] Special Initiative ONE WORLD – No Hunger-. The project is coordinated by the German Corporation for International Cooperation (GIZ), which aims to strengthen actors of the knowledge hubs and their networks in the regions of Eastern, Southern, West, North and Central Africa in promoting organic agriculture and agroecology. Western Africa has Senegal, Benin, Gambia, Mali and Nigeria; Eastern Africa has Uganda, Kenya, Tanzania and Rwanda. Madagascar will be integrated as an additional country in the Eastern Africa Hub[2] in 2022, while Ethiopia is envisioned as part of the hub once the political environment stabilizes. Southern Africa has Zambia, Namibia, South Africa, and Malawi; Northern Africa has Egypt, Morocco, and Tunisia; Central Africa's hub is based in Cameroon. The assemblage of these five partners is being addressed through three main strategies.

Integrated Knowledge Management Systems Strategy: This involves collecting, validating and preparing traditional and scientific knowledge on the production, processing and marketing of organic products. The hubs generate content on important thematic areas, including nutrition and food security, climate change,

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

[2] KHEA is the Knowledge Hub for Organic Agriculture in Eastern Africa. For more information see https://biovisionafricatrust.org/the-impact-of-the-khea-farmer-trainings-on-good-organic-agriculture-productivity-in-uganda/

water management, resilience and sustainability of farming systems, markets and market development, and technology transfer and learning. Communication tools include knowledge databases/websites, publications, Information Education Communication (IEC) materials, videos, ICT applications and social media (Facebook, Twitter, Flickr and YouTube).

Dissemination and Capacity Building Strategy: This involves adapting existing knowledge and good practices for participating countries, strengthening the competencies of multipliers and disseminating knowledge to various target groups along the value chain, based on these groups' needs and constraints. Regional and country training programmes (Training of Teams of Trainers/Facilitators) are expected to enable multipliers (innovators, entrepreneurs, model farmers, extensionists, etc.) to access knowledge from digital knowledge platforms and to use various tools to disseminate that knowledge to diverse target groups.

Market Systems Development and Networking Strategy: This involves working on a network with key actors of the organic agriculture value chains across the five regions for creating incomes, providing services, and improving the livelihoods of farm households and other community members.

The strategy links the KCOA project for complementarity and shared learning to other initiatives around the African continent, such as the EOA-I. The strategy aims, moreover, to build the capacity and resilience of local systems, leveraging the incentives and resources of the private sector, ensuring the beneficial inclusion of the smallholder farmers, and stimulating change and innovation that will grow beyond the project's life. A business development services approach is used to link target groups to service providers (for inputs, marketing, training, information, technology development and transfer purposes) and make markets work for the poor. Certification and standards within context-adapted participatory guarantee systems (PGS) and an internal control system are encouraged. A value chain approach focusing on strategic value chains and the specific needs of the value chain actors are also adopted. Various partners are involved – regional and country partners[1], international partners[2] and the AU.

Governance and institutional development

The Continental Steering Committee (CSC) of the EOA-I, led by the AU,[3] continued to provide strategic guidance and patronage to the implementation of EOA in Africa

[1] Regional and country partners include non-governmental organisations, such as Biovision Africa Trust and PELUM Uganda for Eastern Africa, the Sustainability Institute for South Africa; ENDA ProNat, FENAB & Agrecol Afrique for West Africa; SAILD, GADD, Inades, CPE and CPCRE for Central Africa.
[2] International partners included organisations such as IFOAM - Organics International, Biovision Foundation, Access Agriculture, the Research Institute of Organic Agriculture FiBL and the International Centre of Insect Physiology and Ecology ICIPE.
[3] 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).

despite COVID-19 challenges. The 15th and 16th African Union CSC meetings were held virtually and in Cameroon, respectively. Key decisions and resolutions in 2021 were taken; among them were the formation of an EOA Multistakeholder Platform, which would be led by AfrONet, and the development of a strategy on resource mobilization to support EOA initiatives beyond Eastern and West Africa to cover all the five regions of the continent.

The AU-led EOA-I has continued to foster a policy enabling an environment for the development of EOA through its efforts to integrate EOA indicators and parameters within the Comprehensive Africa Agriculture Development Programme (CAADP) Biennial Review framework, which provides a continental scorecard for AU member states on their implementation status of the Malabo Declaration[1] and commitments by Heads of States and Governments of the African Union, having met at the Twenty Third Ordinary Session of the AU Assembly in Malabo, Equatorial Guinea, from 26-27 June 2014, on the Theme of the African Year of Agriculture and Food Security: "Transforming Africa's Agriculture for Shared Prosperity and Improved Livelihoods through Harnessing Opportunities for Inclusive Growth and Sustainable Development.

The proposed EOA indicators will be piloted in 15 countries selected from all five regions of Africa in 2022. Once approved, they will be endorsed for inclusion in the Biennial Review framework. The availability of the to-be-collected data will be key to the indicators' inclusion. It is noteworthy that the status of EOA was included in the report presented during the Fourth Ordinary Session of the Specialised Technical Committee on Agriculture, Rural Development, Water and Environment held in December 2021. The report contained information on hectares of land under EOA as reported by Willer et al. (2021), showing that the surface of certified land under organic agriculture in Africa increased from 1.1 million hectares in 2011 – when the African Union Commission's Decision on Organic Farming was adopted – to over 2.1 million hectares in 2020. A report on biofertilisers for EOA production revealed that Africa's biofertiliser market was valued at 45.076 million US dollars in 2017 and is expected to grow at a rate of 5.9 percent per annum from 2022 to 2026. Generally, the biofertiliser sector is underdeveloped, and the situation varies across countries and regions in Africa, depending on the status of EOA policy, standards, and government support as reported in the continental policy study.

The EOA-I has developed a roadmap for the establishment of a Farmer-Managed Seed Systems (FMSSs) cluster within the African Seed and Biotechnology Platform working group to address FMSS policy concerns on the continent.

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.

[1] The Malabo Declaration commitments are a targeted approach to achieve the agricultural vision for the continent.

The development of the EOA-I to cover all five political regions of Africa has been boosted by the launch of the EOA-I regional platform in Central Africa with the support of the Economic Community for Central African States (ECCAS). A meeting was also held between the AU and its EOA-I Secretariat and the Arab Maghreb Union's (AMU) Secretariat – with Algeria, Mauritania, Egypt, Tunisia and Morocco – to discuss the roadmap for the establishment of an EOA-I regional platform for Northern Africa. A similar meeting is being planned for the establishment of the EOA-I regional platform for Southern Africa in collaboration with the Southern African Development Community (SADC).

EOA certification in Africa has gained leverage through a Memorandum of Understanding (MoU) signed between the AU-led EOAI Continental Secretariat hosted by Biovision Africa Trust (BvAT) and the African Organisation for Standardisation (ARSO) aimed at developing a common continental EOA standard. The partnership will additionally link the EOAI with the African Continental Free Trade Area (AfCFTA) Secretariat to engage further on strategies of boosting EOA trade on the continent.

A comparative study has been completed in 12 countries on the impact of the COVID-19 pandemic on both EOA and conventional systems and assesses the resilience of farmers and other value chain actors in both systems. Preliminary results indicate that EOA systems are more resilient, and its farmers responded to the pandemic shocks more comfortably compared to the others. The study results indicate that the farming activities of 81 percent of the households were negatively impacted by Government restrictions and public health measures. Further, 81 percent of them were conventional compared to 77 percent organic farmers. The farmers' activities were mainly affected by poor access to extension, inputs and post-harvest losses. While organic farmers faced challenges in accessing extension services (61 percent) compared to 58 percent conventional farmers, fewer organic farmers faced challenges in access to inputs (54 percent organic, 63 percent conventional), post-harvest losses (53/59 percent)) and access to credit (31 percent/33 percent). Another study is planned to undertake a multi-country assessment of the landscape of EOA initiatives in Africa.

Data on the status of organic agriculture

Data on organic agriculture in Africa remains scanty and perhaps not precise. A survey tool developed by the EOA-I CSC in collaboration with IFOAM – Organics International to support the gathering of relevant data on programmes and initiatives was not applied. The tool was expected to be regularly used with other together with other sources of data like Ministries of Agriculture and National Bureaus of Statistics on board to harness 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: the extent to which a national policy is in place and supported by a budgetary allocation;

the extent to which organic regulations have been promulgated and implemented; the extent to which national standards and certification are in place; the extent of government support to the organic sector; the degree to which civil society is involved in the development of the EOA sector; and 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 developmental pathway. Processes and outcomes need to be monitored systematically 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 financial incentives are associated with environmentally responsible production. The criteria, desired outcomes and process indicators should help governments and EOA stakeholders keep track of progress within the sector and allow the African Union and the EOA-I CSC to evaluate the progress towards sustainable development.

Achievements by the African Organic Network (AfrONet)

The African Organic Network - AfrONet, a 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 EOA-I for Africa. AfrONet is a member of the EOA-I's CSC and the Regional/Cluster Steering Committees.[1] AfrONet positions itself to network with all key networks on the African continent. Specifically, in Southern Africa, AfrONet reaches out to the Southern African Network for Organic Development (SANOD) and IFOAM's Southern African Network (ISAN), which have been uniting stakeholders and further developing organic agriculture in the region. Other active regional networks relevant to AfrONet are from Western, Central, and Eastern Africa. AfrONet has been bringing together all the networks, partners, and other stakeholders under the African Organic Conference's platform. Rwanda will host the 5th African Organic Conference at Kigali by the end of 2022, designed for physical and online attendance.

AfrONet continued to take on efforts for greener agriculture in Africa by implementing the "Innovative Institutions for Ecological Organic Agriculture in Africa" (IIABA) financed by the French Development Agency (AFD). The project aims to strengthen national organic agriculture movements in Tanzania, Uganda, and Morocco through a 1.5 million euro grant from the AFD to AfrONet. 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), the 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).

[1]

The IIABA project has successfully built innovative markets within the project areas based on results of research undertaken. NOGAMU and some of its partners and members have successfully established weekly organic markets in Kampala and Entebbe. Studies on PGS have been conducted, and a model is being developed for replication to AfrONet's members across Africa. Public policy analysis on agriculture has been conducted to inform stakeholders on policy formulation. In Tanzania, TOAM, a partner of AfrONet, organised the 2nd agroecology conference in Dodoma to discuss organic agriculture policy and EOA's potential in the country and region. In Uganda, the certification body Ugocert has been revived through the IIABA project and has become vibrant in engaging farmers and traders on organic certification.

AfrONet has reached out to the organic movement in the Democratic Republic of the Congo (DRC) for stronger partnerships promoting organic agriculture. In May 2021, the AfrONet Secretariat visited RECABIO, a national organic movement in the DRC, and harnessed partnerships to support the young NOAM there, established in 2018. RECABIO is registered as a national actor and is already operational in South Kivu and recently extended to North Kivu province.

AfrONet has strengthened its partnership with the Malawi Organic Growers Association (MOGA) during a late November 2021 visit to the country with support from the EOA-I–SDC project. This, too, is aimed at bringing national organic movements together and sharing information and linkages to the continental platform of organic actors under the AU.

AfrONet's regional affiliates also achieved various milestones in 2021. The Regional Secretariat of the EOA-I West Africa, in collaboration with the West African Organic Network (WAfrONet) under the guidance of the Regional Steering Committee (RSC), contributed immensely to the growth of EOA in West Africa. The 7th and 8th RSC meetings were held virtually in April 2021 and December 2021, respectively, providing opportunities for sharing and learning among West Africa stakeholders. The 6th West African Organic Conference held at Royal Beach Hotel in Ouagadougou, Burkina Faso, from Nov. 23 to 26, 2021, with the theme "Feeding the World Without Poisoning", hosted by the National Council of Organic Agriculture CNABio with the support of the Ministry of Agriculture of Burkina Faso, brought together about 250 participants of organic agriculture and agroecology from West Africa and other countries in the hybrid event (physical and virtual).

As one of the key recommendations from the General Assembly of the West African Organic Network (WAfrONet) at the 5th West African Organic Conference in Ghana (2020), the regional secretariat, under the leadership of the Economic Community of West Africa States (ECOWAS), organised a 4-day regional workshop for stakeholders' validation of the first draft of the "Harmonised Organic Agriculture Standard in West Africa". The tool will facilitate the promotion of organic agriculture trade across the region. To strengthen the capacity of the implementing partners, the partners underwent capacity strengthening in fundraising and project monitoring and evaluation.

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 ECOWAS Commission, the West African Center for Agricultural Research and Development and the Central African Council for Agricultural Research and Development. Among other notable achievements, the Regional Cluster conducted a study on Mapping Stakeholders of Organic and Ecological Agriculture in West Africa, published in French and English.

Preparations for the 5th African Organic Conference have started. This conference will be in Kigali, Rwanda, with some resources already committed by the French Development Agency. The Rwanda Organic Agriculture Movement (ROAM), an umbrella body of organic farmers and actors in Rwanda and an AfrONet member, is working closely with AfrONet to take a key role in coordinating the conference.

The Network of Organic Agriculture Researchers in Africa (NOARA)

NOARA, the Network of Organic Agriculture Researchers in Africa (www.noara.bio), continued working on its roles, including:

- 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 necessary to address NOARA's objectives.

In 2021, NOARA continued to recruit new members from within and outside Africa, including Europe and North America, with over 300 more members from 29 countries focusing on organic agriculture activities in Africa. The research network published (online and hardcopy) the Proceedings of the 5th West Africa Organic Conference hosted by Ghana and prepared volumes 5 and 6 of the African Journal of Organic Agriculture and Ecology (AJOAE). The 2021 World Food Day was marked with an organic researcher dialogue on the year's theme: "Our Actions are Our Future".

Developing the demand-driven Organic Agriculture Research Agenda for Africa 2030 was advanced with a multi-stakeholder approach involving NOARA members and some partners. Comprehensive research questions have been prepared to address research gaps identified by multi-stakeholders of organic agriculture in Africa. The document will be published early in 2022 for researchers, policymakers and development partners in organic agriculture and agroecology in Africa.

NOARA collaborated with the Swiss Research Institute of Organic Agriculture FiBL on the ProEcoAfrica project regarding the productivity, profitability and sustainability of organic farming in Africa completed in 2021. Collaboration is ongoing with the African Forum for Agricultural Advisory Services through the Nigerian Forum for Agricultural Extension and Advisory Services (NIFAAS) concerning sustainable partnerships for boosting the utilisation of digital tools in climate-smart agriculture.

NOARA is presently working on a consortium with the Forum for Agricultural Research in Africa (FARA) on agroecology and African food cities. Together with FiBL, NOARA is also defining and characterising smallholder model organic farms in Africa with agricultural sustainability measures, capacity development and participatory approaches to marketing in the smallholder farming sector in Africa.

Outlook

Focus on organic agriculture (EOA) for its multiple benefits, including addressing challenges of climate change, is gaining global attention. Building on scientific and practical evidence, multi-stakeholders in Africa, working in partnership with development partners, are investing in innovations and opportunities for organic agriculture to enhance the productivity, resilience and profitability of smallholder farming systems in Africa. Investments in research, developing 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 natural resources, particularly soil, water and biodiversity. A better future for the organic sector requires African governments, their relevant institutions, farmers, farmer organisations, development partners and the private sector to invest resources in research, policy and programmes to establish platforms for experience-sharing, learning and collaboration, thereby building the basis for poverty reduction and sustainable, long-term food and nutrition security.

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Africa: Current Statistics

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There were more than 2.0 million hectares of organic agricultural land in Africa in 2020, 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 148'000 hectares or 7.7 percent compared to 2019, and it has increased by more than 2 million hectares since 2000. In 2020, 35 African countries reported data on organic activities. Since 2017, Tunisia has been the country with the largest organic area, with over 297'000 hectares. Ethiopia was the country with the highest number of organic producers, with almost 220'000 producers in 2020, followed by Tanzania with nearly 149'000 producers and Uganda with over 139'000 producers. For more than a decade, 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 20.7 percent in 2020. For the second time in a row, Sierra Leone and Réunion (France) were among the top three countries with the highest organic share, reaching 5.6 percent and 4.0 percent in 2020, respectively.

Land use

In 2020, land use information was available for 96.8 percent of the organic agricultural area in Africa. Two-thirds of all organic agricultural land was used for permanent crops (almost 1.4 million hectares). Almost 30 percent was used for arable crops (nearly 620'000 hectares), and less than 1 percent (nearly 915 hectares) was grassland/grazing area.

The most important organic **permanent crops** were nuts (mainly cashew nuts), which were grown on an area of over 291'000 hectares, followed by olives, coffee, and cocoa – each with an area above 200'000 hectares. The countries with the largest permanent crop areas were Tunisia (mainly olives), which reported an area of nearly 269'000 hectares, followed by Sierra Leone, Ethiopia (mainly coffee), Congo (cocoa and coffee), and Kenya (mainly nuts), with the latter reaching an area of nearly 113'000 hectares.

- Organic **nuts** were grown on over 291'000 hectares, representing 4.8 percent of the total nuts area of the continent and 38.6 percent of the world's organic nuts area. The largest organic nuts areas were in Kenya (over 94'000 hectares) and Côte d'Ivoire (almost 65'000 hectares). Since 2010, the organic nuts area has grown by a factor of almost fourteen.

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- Organic **olives** were grown on over 260'000 hectares, representing 7.6 percent of the total olives area of the continent and 29.0 percent of the world's organic olive area. The largest organic olives area was in Tunisia (over 256'000 hectares). Since 2010, the organic olive area has doubled in size.
- Organic **coffee** was grown on over 254'000 hectares, representing 8.2 percent of the total coffee area of the continent and 34.1 percent of the world's organic coffee area. The largest organic coffee area was in Ethiopia (nearly 183'000 hectares). Since 2010, the organic coffee area has grown by half.
- Organic **cocoa** was grown on almost 216'000 hectares, representing 2.5 percent of the total cocoa area of the continent and 56.1 percent of the world's organic cocoa area. The largest organic cocoa areas were in the Democratic Republic of the Congo (nearly 95'000 hectares) and Sierra Leone (over 61'000 hectares). Since 2010, the organic cocoa area has grown by a factor of six.

The most important organic **arable crops** were textile crops (mainly cotton), which were grown on an area of over 206'000 hectares, and oilseeds (mainly soybeans and sesame), with an area of almost 185'000 hectares. The countries with the largest arable crop areas were Tanzania (mainly textile crops), which reported an area of nearly 159'000 hectares, followed by Togo (mainly oilseeds) and Egypt, with an area of over 113'000 hectares and over 96'000 hectares, respectively.

- Organic **textile crops** were grown on over 206'000 hectares, representing 3.8 percent of the total textile crops area of the continent and 33.4 percent of the world's organic textile crops area. The largest organic textile crops area was in Tanzania (over 154'000 hectares), followed by Uganda (almost 40'000 hectares). Since 2010, the organic textile crops area has grown by a factor of over five.
- Organic **oilseeds** were grown on almost 185'000 hectares, representing 0.5 percent of the total oilseeds area of the continent and 10.5 percent of the world's organic oilseeds area. The largest organic oilseeds area was in Togo (almost 112'000 hectares). Since 2010, the organic oilseeds area has grown by a factor of four.

Wild collection

Wild collection has an important role in Africa, with more than 11.7 million hectares certified as organic in 2020. Zambia was the country with the largest area (3.2 million hectares, mainly bee pastures), followed by Namibia (nearly 2.6 million hectares, mainly medicinal and aromatic plants – devil's claw), Mozambique (1.8 million hectares, exclusively baobab fruit), Lesotho (nearly 1.0 million hectares, exclusively rose hips), Somalia (940'000 hectares, mainly gums natural), and South Africa (nearly 860'000 hectares, mainly medicinal and aromatic plants and rose hips). Medicinal and aromatic plants, such as devil's claw (*Harpagophytum procumbens*), were the commodities that had the largest area (nearly 3.3 million hectares), followed by rose hips (over 1.4 million hectares). For beekeeping, 2.5 million hectares were reported for Zambia.

Producers

In 2020, there were nearly 834'000 organic producers in Africa. The countries with the highest number of organic producers were Ethiopia (almost 220'000), Tanzania (nearly 149'000), and Uganda (over 139'000). 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.

For more information about the African figures, see data tables for Africa, page 197.

Organic Agriculture in Africa: Graphs

Africa: The ten countries with the largest organic agricultural area 2020

Source: FiBL survey 2022

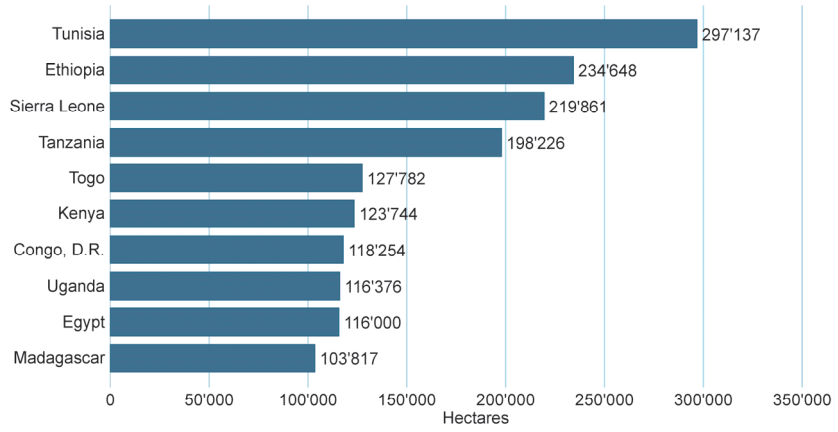


Figure 59: Africa: The ten countries with the largest organic agricultural area 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Africa: The ten countries with the highest organic share of total agricultural land 2020

Source: FiBL survey 2022

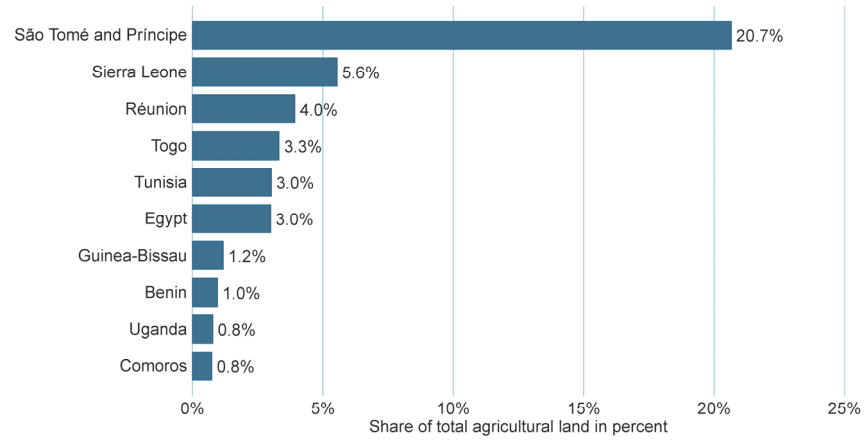


Figure 60: Africa: The countries with the highest organic share of total agricultural land 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

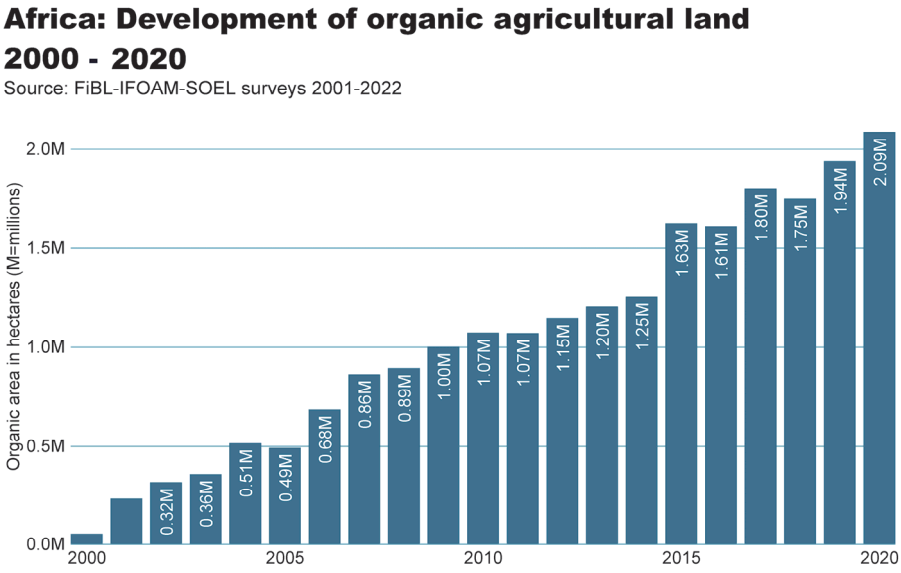


Figure 61: Africa: Development of organic agricultural land 2000-2020

Source: FiBL-IFOAM-SOEL-surveys 2001-2022

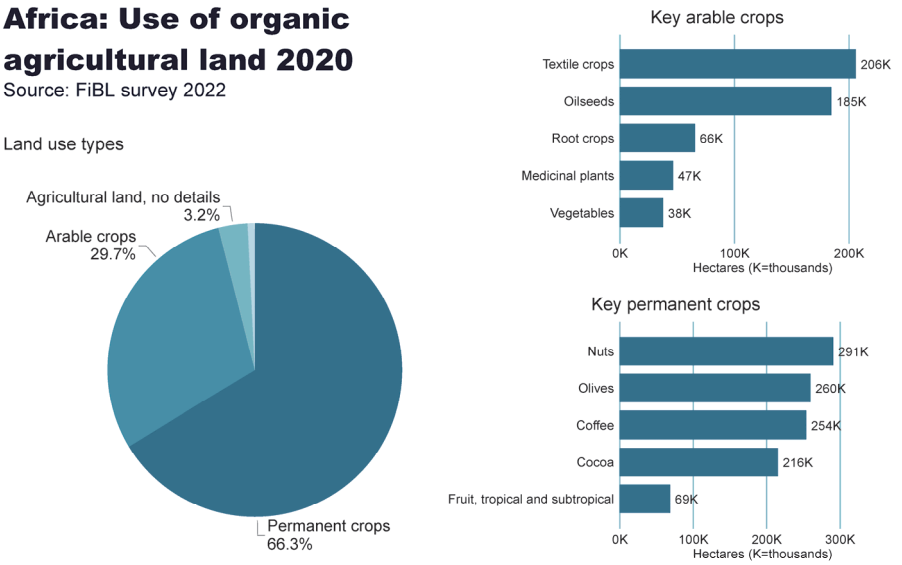


Figure 62: Africa: Use of organic agricultural land 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Organic Agriculture in Africa: Tables

Table 51: Africa: Organic agricultural land, organic share of total agricultural land and number of organic producers 2020

Country	Area [ha]	Share of total agri. land [%]	Producers [no.]
Algeria	772	0.002%	64
Benin	38'822	1.0%	6'467
Burkina Faso	66'175	0.5%	27'346
Burundi	319	0.02%	959
Cameroon	345	0.004%	499
Cape Verde	3	0.003%	223
Comoros	1'004	0.8%	767
Côte d'Ivoire	79'125	0.4%	2'880
Congo, D.R.	118'254	0.4%	72'327
Egypt	116'000	3.0%	970
Eswatini	1'156	0.1%	2
Ethiopia	234'648	0.6%	219'566
Ghana	74'874	0.5%	3'912
Guinea-Bissau	9'844	1.2%	1
Kenya	123'744	0.4%	42'335
Madagascar	103'817	0.3%	54'376
Malawi	232	0.004%	21
Mali	14'675	0.04%	11'004
Mauritius	5	0.01%	20
Mayotte	87	0.4%	12
Morocco	11'452	0.04%	423
Mozambique	14'438	0.03%	394
Nigeria	54'995	0.1%	316
Réunion (France)	1'901	4.0%	402
Rwanda	5'188	0.3%	8'368
São Tomé and Príncipe	9'103	20.7%	3'565
Senegal	3'809	0.04%	18'373
Sierra Leone	219'861	5.6%	5'505
South Africa	40'954	0.04%	220
Tanzania	198'226	0.5%	148'607
Togo	127'782	3.3%	47'271
Tunisia	297'137	3.0%	6'525
Uganda	116'376	0.8%	139'191
Zambia	691	0.003%	10'100
Zimbabwe	1'043	0.01%	963
Total*	**2'086'858**	**0.2%**	**833'986**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322
**Total number includes data for countries with less than three operators.*

Table 52: Africa: All organic areas 2020

Country	Agri-culture [ha]	Forest [ha]	Grazed non agri. land [ha]	Wild collection [ha]	Other non agri. land [ha]	Total [ha]
Algeria	772					772
Benin	38'822					38'822
Botswana				6'380		6'380
Burkina Faso	66'175			201'055		267'230
Burundi	319					319
Cameroon	345					345
Cape Verde	3					3
Chad				114'800		114'800
Comoros	1'004					1'004
Côte d'Ivoire	79'124					79'124
Congo, D.R.	118'254					118'254
Egypt	116'000					116'000
Eswatini	1'156					1'156
Ethiopia	234'648			1'284		235'932
Ghana	74'874	1		63'038	2	137'916
Guinea-Bissau	9'844					9'844
Kenya	123'744			177'384		301'128
Lesotho				997'028		997'028
Madagascar	103'817	158		5'643	132	109'750
Malawi	232					232
Mali	14'675			14'795		29'470
Mauritius	5			16'843		16'848
Mayotte	87					87
Morocco	11'452			335'306		346'759
Mozambique	14'438			1'800'030		1'814'468
Namibia				2'598'772		2'598'772
Nigeria	54'995					54'995
Réunion (France)	1'901					1'901
Rwanda	5'188					5'188
São Tomé and Príncipe	9'103					9'103
Senegal	3'809			20'360		24'169
Seychelles				1'223		1'223
Sierra Leone	219'861					219'861
Somalia				940'034		940'034
South Africa	40'954	137		859'815	36	900'942
Sudan				98'044		98'044
Tanzania	198'226			2'597		200'823
Togo	127'782					127'782
Tunisia	297'137	37'825				334'962
Uganda	116'376					116'376
Zambia	691			3'200'000		3'200'691
Zimbabwe	1'043			263'550		264'593
Total	**2'086'858**	**38'122**		**11'717'981**	**170**	**13'843'759**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Table 53: Africa: Land use in organic agriculture 2020

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		64'938
Arable land crops	Cereals	17'359
	Dry pulses and protein crops for the production of grain	3'931
	Fallow land, crop rotation	13'202
	Flowers and ornamental plants	94
	Fresh vegetables and melons	37'980
	Industrial crops	92
	Medicinal and aromatic plants	46'677
	Oilseeds	184'769
	Plants harvested green	7'679
	Root crops	65'881
	Seeds and seedlings	5
	Strawberries	976
	Sugarcane	9'396
	Textile crops	206'129
	Arable crops, other	25'638
Arable land crops total		619'807
Cropland, no details		1'933
Other agricultural land		15'317
Permanent crops	Berries	55
	Citrus fruit	6'898
	Cocoa	215'652
	Coconut	3'824
	Coffee	254'221
	Fruit of temperate climate zones	4'403
	Fruit, tropical and subtropical	69'038
	Fruit/nuts/berries	401
	Grapes	4'291
	Medicinal and aromatic plants, permanent	61'451
	Nuts	291'195
	Oleaginous fruits	11'850
	Olives	260'207
	Tea/mate, etc.	26'595
	Permanent crops, other	173'869
Permanent crops total		1'383'948
Permanent grassland		915
Total		**2'086'858**

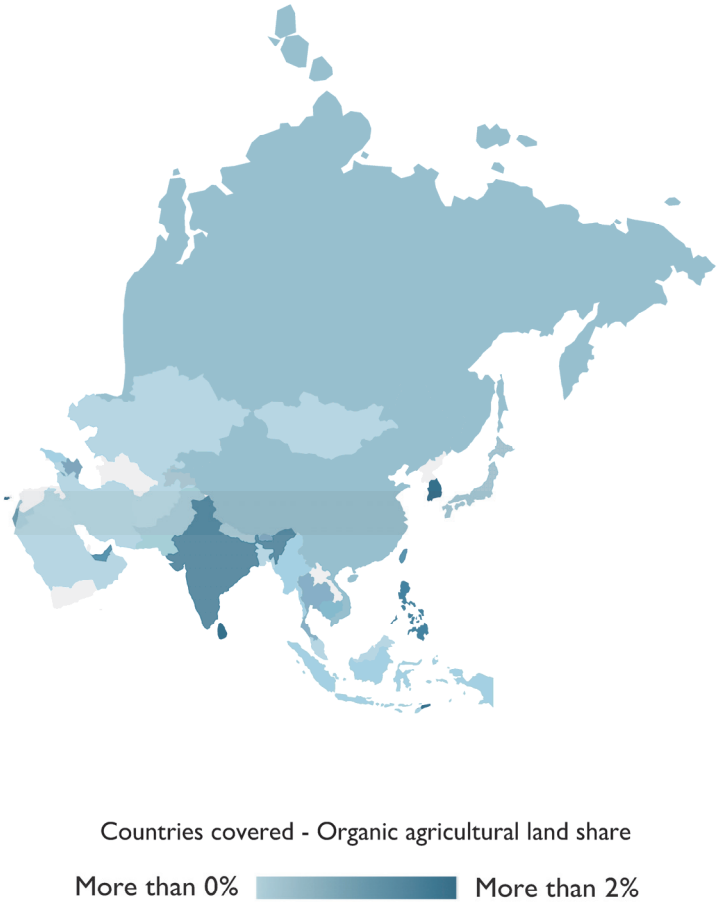
Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Table 54: Africa: Use of wild collection areas 2020

Land use	Area [ha]
Bee pastures	2'501'284
Forest products	77
Fruit, wild collection	705'590
Marula, wild collection	90'225
Medicinal and aromatic plants, wild	3'262'908
Nuts, wild collection	284'041
Oil plants, wild collection	33'197
Rose hips, wild collection	1'421'703
Wild collection, no details	3'418'957
Total	**11'717'981**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322.

Asia



Map 3: Organic agricultural land in the countries of Asia 2020

Source: FiBL survey 2022 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 322

Developments in the Organic Sector in Asia in 2021

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

Overall, there were more developments in the organic sector in Asia in 2021 than in 2020. Consumer awareness of safe, local, and organic food has increased, with many countries reporting increasing sales for organic products. The keyword among governments was carbon neutrality, with national policies and action plans being developed. However, most governments have failed to link organic agriculture as a pathway to achieving carbon neutrality.

In China, a survey showed that 85.9 percent of consumers increased their consumption of organic products. In 2020, Biofach China was postponed from May and was held in July. In 2021, Biofach China was held physically and had a 45 percent increase of exhibitors.

In Bangladesh, there was an observed willingness of the consumers to pay more for organic food to build immunity. Local policymakers are seeing the need to provide more nutritious, safer, and organic food from "farm to fork". This was supported by a doubling in sales of many organic companies in the country.

In India, demand for organic products increased, driven by a growing number of consumers who believe organic products can improve their immune systems. There was a noticeable increase in the consumption of organic products from high-end consumers, leading to the proliferation of speciality organic stores throughout the big cities in India.

Other countries in Asia formulated policies and strengthened their existing laws to further the development of organic agriculture.

In Indonesia, the government has prepared the Mutual Recognition Arrangement (MRA) on organic standards with the Association of Southeast Asian Nations (ASEAN) members. Members of ASEAN agreed to harmonise their national organic standards and create the opportunity of trading organic products among the members.

In Japan, the Ministry of Agriculture, Forestry and Fisheries announced the Strategy for Sustainable Food Systems-Measures for the Achievement of Decarbonisation and Resilience with Innovation (MeaDRI), which laid out measures to achieve zero carbon emission in agriculture, forestry and fisheries by 2050.

In the Philippines, the Department of Agriculture, through the National Organic Agriculture Program, strengthened the Organic Agriculture Act of 2010, which has been amended as the Republic Act (RA) 11511. One of the biggest highlights of RA

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11511 is the recognition of the Participatory Guarantee Systems (PGS), which allows PGS groups to label their products as organic. In coordination with the Agricultural Training Institute, the Department of Agriculture conducted a series of meetings and orientations to educate farmers and groups regarding PGS.

In South Korea, the central government announced in October 2020 its vision of achieving carbon neutrality by 2050. In 2021, the Carbon Neutrality Commission was established, and it was announced that by 2030, there would be a 40 percent increase (over the target announced in 2018) in carbon emissions reduction. A comprehensive plan to reach carbon neutrality by 2050 was also submitted to the Conference of the Parties 26 (COP26)[1].

For information about policies in Asia, see also chapter by Hysa et al., page 158.

Bangladesh

Immunity is becoming a prime concern among the consumers of Bangladesh since the onset of the pandemic in early 2020. This concern was particularly widespread among the urban elite society, who believed that immunity could play roles in both containing the spread and controlling the severity of COVID-19 infection. In this situation, organic and safe foods are viewed as an alternative as these foods are without agrochemicals and antibiotics. Many consumers are now willing to pay more for organic food to build immunity, depending on their incomes, job security, and the likelihood of a long-term recession. As such, the pandemic has had a positive impact on the number of consumers and policymakers considering the need for providing more nutritious, safer and organic food from "farm to fork".

The Bangladesh Organic Products Manufacturer Association (BOPMA) is the prime body of different companies and entrepreneurs dealing with organic products. According to BOPMA, from March 2020 to February 2021, the sales value of organic products doubled among 63 companies out of the total 81 companies dealing with organic food, while the rest of the companies recorded sales which more than tripled. For example, "Excellent World", an organic food, health supplement and cosmetics company, reached more than 240 million Bangladesh Taka[2] in the fiscal year 2020/2021 compared with 180 million Bangladesh[3] in the fiscal year 2019/2020. It was also observed that the demand for organic food was higher than for non-food organic products during the current pandemic.

Cambodia

Cambodia has been the focus for interventions of international development actors since the early 1990s. More than half of the country's national budget is funded through development assistance. This made any policy development dependent on aid

[1] The 2021 United Nations Climate Change Conference (COP26) was the 26th United Nations Climate Change conference, held in Glasgow, Scotland, United Kingdom, from 31 October to 13 November 2021. For more information see https://ukcop26.org.
[2] Approximately 2.5 million euros.
[3] Approximately 1.9 million euros.

programs rather than the demands of the civil society in the country. Unfortunately, this applies to the organic agriculture sector as well.

In 2020, the Minister of Agriculture, Forestry and Fisheries issued the National Organic Technical Guidelines and the Organic Agriculture Standard "CAM ORGANIC". The Ministry will manage the certification process and its logo. However, the recognition of organic certification at the local level is challenging as most of the products are sold through traders and eventually marketed at wet markets without any packaging or labels.

Nevertheless, the global demand for organic products has encouraged export traders and private farms to utilise the country's vast land and its three million smallholder farmers[1]. There were 34 USDA NOP certified operators in Cambodia in 2019, out of which nine were rice operators and 15 pepper operators. The number increased to 54 operators in 2021,[2] and cassava and cashew nuts were added to the list of crops grown. Several traders reported that the COVID-19 pandemic had caused a 50 to 70 percent decrease in sales of organic rice, which is considered due to old stock clearance. The rice was ordered when the panic buying was happening in the previous year, and the skyrocketing price of freight led to decreased organic rice exports.

China

Policies on ecological civilisation[3] and rural revitalisation have been the keywords in the development of organic agriculture in China in recent years. Local governments formulated development plans and introduced incentive policies to promote agriculture transformation to ecological or organic agriculture. In 2020, nearly 100 various local policies were formulated to encourage and support the development of the organic industry at all levels.

From 2018, the Certification Supervision Department[4] under the State Administration for Market Regulation (SAMR) and the Certification and Accreditation Administration of the People's Republic of China (CNCA) has been responsible for managing, coordinating, and supervising organic product certification. The National Standards for "Organic Products" (GB/T19630) and the "Implementation Rules for Organic Product Certification" were revised in 2019 and implemented from 2020 onwards. The Decree of "Administrative Measures on Organic Product Certification" is being revised since 2019 and will be issued in 2022. In December 2020, the guidelines on product sampling and testing for five categories (vegetables, fruits, tea, livestock and poultry, dairy

[1] Ministry of Environment, Cambodia (2011): Climate Change and Agriculture / Cambodia Human Development Report 2011. http://hdr.undp.org/sites/default/files/cambodia_2011_nhdr.pdf
[2] USDA Organic INTEGRITY Database
[3] Ecological civilisation is the final goal of social and environmental reform within a given society. Although the term was first coined in the 1980s, it did not see widespread use until 2007, when "ecological civilization" became an explicit goal of the Communist Party of China (CPC). For more information see https://en.wikipedia.org/wiki/Ecological_civilization.
[4] Certification Supervision Department of China; http://www.samr.gov.cn/rzjgs/

products) of organic products were issued to harmonise the certification requirements of product testing in the regulations.

The pandemic has largely impacted organic agriculture development in China from 2020. In order to deal with the impact of COVID-19, SAMR issued related notices to guide organic certification bodies to carry out online inspections and postpone the validity of certificates under the pandemic. Organic certifiers tried to organise the online and offline training based on the latest version of the organic rules and received positive responses from organic enterprises.

Due to the strict government restrictions, the 14th Biofach China was postponed from May to July 2020 when it was finally held in Shanghai with 146 companies from six countries and regions worldwide. The following year in 2021, Biofach China was also held in-person and saw a 45 percent increase in the number of exhibitors. Another organic exhibition, the China International Organic Food Exhibition, was held in-person in Xiamen, Fujian, in November 2020, with a total of 393 companies.[1]

The pandemic also had some impact on the buying behaviour of most people. Of the 623 surveyed consumers, 85.9 percent increased the consumption ratio of organic products according to the survey in 2020 supported by CNCA. Some organic operators commented that the sales of organic products increased 30 to 50 percent during the government restrictions imposed due to the pandemic, mainly due to online buying. However, there was no noticeable increase in sales when the physical stores started to reopen.

The pandemic also affected the supply chain of the organic market to some extent. 56.6 percent of 122 surveyed consumers reflected that the imports of organic products were affected. The export of organic products became more complex in 2021 than in the previous year because overseas containers were hard to book, and their prices rose sharply. Of the surveyed operators, 64.2 percent mentioned that they tried hard to maintain the current status of their organic undertakings instead of seeking expansion. In general, many small enterprises are negatively affected, but the revenue of processed products and more established supply chain enterprises increased, so in fact, the organic industrial structure is being optimised.

India

Even as the pandemic-led crisis shrank India's overall economy, its agriculture sector, supported by a normal monsoon, robust kharif[1] sowing and adequate water storage in reservoirs, remained a “bright spot”.

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[1] CNCA &CAU, 2021. Chinese organic product certification and industrial development (2021). China Agricultural Science and Technology Press, Beijing

[1] Kharif crops, monsoon crops or autumn crops are domesticated plants that are cultivated and harvested in India, Pakistan and Bangladesh during the Indian subcontinent's monsoon season, which lasts from June to November depending on the area. More information https://en.wikipedia.org/wiki/Kharif_crop.

The Government of India sensed an opportunity in the pandemic to usher in various reforms to agricultural marketing and minimise restrictions on the movement and sale of agricultural commodities. The "Eat Right India" campaign by the Food Safety and Standard Authority of India (FSSAI) had reached out to the public on the importance of the right food during the COVID-19 pandemic and created more awareness among the public on the importance of nutritious food. This initiative has raised awareness amongst consumers around the benefits of organic food.[1] A growing number of consumers are driving the demand for organic products; these consumers perceive these products as improving immunity, better quality, and increased availability through online/e-commerce channels. India's young, highly educated consumers are concerned with chemicals and pesticide residues in food products. This demographic is spurring demand for organic products. Indian high-income consumers are similarly propelling organic food and beverage consumption. High-end hotels and restaurants are offering specialised organic menus for patrons. This leads to the mushrooming of speciality organic stores catering to high-income consumers in Tier-1&2 cities.[2]

India has implemented a Geographical Indication for certified organic products for exports. The government is promoting organic agriculture as part of the Paramparagat Krishi Vikas Yojana (PKVY) (Traditional Agriculture Development Scheme), a part of the National Mission of Sustainable Agriculture. Other schemes of the Government of India for the promotion of organic farming in the country include the Capital Investment Subsidy Scheme (CISS) under the Soil Health Management Scheme, the Mission Organic Value Chain Development for the Northeastern Region (MOVCDNER), the Indian Natural Farming Program (Bhartiya Prakritik Krishi Padhati BPKP) and the GOBAR-DHAN scheme (waste to wealth programme) and others.

The Indian Council of Agriculture Research, through agriculture universities and Krishi Vigjan Kendras (KVK)[3], promote the use of technology, including blockchain for sustainable farming and natural farming practices. The Government of India operates a separate website on natural farming for supporting and promoting organic farming.[4]

The government is also implementing its Large Area Certification (LAC) program to transform "Traditional Organic Areas" into certified organic production hubs.[5] Certification is renewed on an annual basis through annual verification by peer

[1] Food Safety and Standards Authority of India (FSSAI) (2021) COVID-19. The FSSAI website, available at www.fssai.gov.in/cms/coronavirus.php

[2] Tier 1 cities are Delhi, Mumbai, Bangalore, Chennai, Hyderabad, Kolkata, Ahmedabad and Pune. Tier 2 cities are Ahmadabad, Kanpur, Chandigarh, Patna, Dehradun, Pondicherry, Pune and other cities which have a population of around one million.

[3] KVK is an integral part of the National Agricultural Research System (NARS). KVK centres have been functioning as Knowledge and Resource Centres of agriculture technology and are linking the NARS with the extension system and farmers. For more information see https://kvk.icar.gov.in/.

[4] Organic farming website of the government of India: https://www.india.gov.in/topics/agriculture/organic-farming

[5] Ministry of Agriculture & Farmers Welfare (2021) Ministry of Agriculture & Farmers Welfare Department of Agriculture, Cooperation and Farmers Welfare (DAC&FW) is working to identify Traditional Organic

appraisals as per the process of PGS-India.[1] Promotion of group farming, farmer producer organisations, farmer producer companies, and women self-help groups focusing on organic farming is being undertaken at the level of national and state-focused programmes. Programmes like the Pradhan Mantri Kisan Samman Nidhi (PM-KISAN) scheme were announced in 2019 to provide 6'000 rupees[2] a year as income support to landowning small and marginal farmers during the pandemic crisis. In recent years, the Participatory Guarantee System has enabled the entry of many small-sized companies (private label or new entrepreneurs), thereby increasing price competition.[3]

The prestigious Padma Shri Award for Agriculture for 2021 was given to Mrs Pappammal, a 105-year-old organic women farmer from Tamil Nadu, along with four other organic farmers, which was a tribute to all the organic farmers in the country.[4] Biofach-India, a virtual event in 2020, was conducted in-person in October 2021 in New Delhi. Ideas like business-farmer networks, an input e-commerce platform, an agri-market place, etc., got automatically validated due to the need of the hour and boosted the confidence of the start-ups and investors.

Notwithstanding the successes in expanding production and commercialising organic foods, the organic industry is experiencing growing pains during the pandemic. The US Department of Agriculture (USDA) National Organic Program (NOP) decided to terminate its organic recognition agreement with India's Agricultural and Processed Food Products Development Authority (APEDA) on January 11, 2021,[5] and the European Union has also put strict restrictions on Indian organic products imported to Europe on detection of high ethylene oxide.

Indonesia

During the COVID-19 pandemic in 2020, there was an increasing demand for organic herbs, essential oils, coconuts and ingredients for cosmetics.[6]

The Indonesia National Standard on Organic Agriculture (SNI 6729-2016) is under revision and has included additional livestock, mushrooms, and honeybees chapters. The government has also prepared the Mutual Recognition Arrangement (MRA) on organic standards with Association of Southeast Asian Nations (ASEAN) members.

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[1] Cariapa et al. (2021): Impact of COVID-19 on the Indian agricultural system: A 10-point strategy for post-pandemic recovery outlook on Agriculture. Sage Journals. https://journals.sagepub.com/doi/full/10.1177/0030727021989060

[2] Approximately 72 euros.

[3] The Department of Agriculture, Cooperation and Farmers Welfare (DAC&FW) is working to identify Traditional Organic Areas to transform them into certified organic production hubs. Available at https://pib.gov.in/PressReleasePage.aspx?PRID=1714281

[4] Livemint.com (2021); Padma Awards 2021: The heroes of Indian agriculture. Available at https://lifestyle.livemint.com/food/discover/padma-awards-2021-the-heroes-of-indian-agriculture

[5] Foreign Agricultural Service / (FAS/SDA (2021) India: USDA AMS Ends Organic Recognition Agreement with India. Attaché Report (GAIN). FAS, USDA, Washington. Available at https://www.fas.usda.gov/data/india-usda-ams-ends-organic-recognition-agreement-india

[6] Firman AR, David W. (2020) Statistik Pertanian Organik Indonesia. Indonesia Organic Alliance.

Members agreed to harmonise their national organic standards and create the opportunity to trade organic products in the region.

At the local government level, two provinces, seventeen municipalities, and three cities have formulated local policies and programs on organic agriculture.

At the farm level, the promotion of Participatory Guarantee Systems (PGS) is encouraged and continues to increase. The Indonesia Organic Alliance has initiated the PAMOR (PGS system) to help small-scale farmers label their products as organic.

Japan

Policy

The Ministry of Agriculture, Forestry and Fisheries (MAFF) has strengthened support for organic agriculture by enhancing existing measures and introducing a new strategic framework. In April 2020, MAFF raised the amount paid to organic farmers under the environmental direct payment scheme to 12'000 yen (approx. 90 euros) per 0.1 hectares, a 50 percent increase from the previous rate. In May 2021, MAFF announced the Strategy for Sustainable Food Systems: Measures for Achievement of Decarbonisation and Resilience with Innovation (MeaDRI), which laid out measures to achieve zero carbon emission in agriculture, forestry and fisheries by 2050. With MeaDRI, MAFF has set ambitious targets for the year 2050, including expanding the area under organic management to 1 million hectares, which would raise the share of organic to 25 percent of the total farmland.

Market

COVID-19 has positively affected the consumption of organic foods in Japan. Consumer panel data collected by Macromill, Inc. indicated that retail sales of organic food, excluding rice, fresh fruits, and vegetables, increased by 17.51 percent in 2020 from the previous year. Among all organic food items, the largest growth in sales in 2020 was seen in livestock products (577.16 percent), followed by ice cream (354.68 percent), cake premix and other home baking materials (221.87 percent), dairy products (201.39 percent) and noodles (78.13 percent).

Retail sales of rice, fresh fruits, and vegetables, most of which are supplied domestically, are more challenging to grasp. The consumer panel data has low coverage for these product items and is not suitable for estimating total retail values. Nevertheless, the consumer panel data indicated that the growth in sales of organic rice was 151.34 percent and that of organic fresh fruits & vegetables 31.49 percent in 2020. However, the area of rice paddies under organic management has grown only minimally, and the area of organic fields other than orchards and livestock feed/grazing land shrank a bit during the fiscal year 2020.[1]

[1] MAFF "Trend in Area Certified According to Organic JAS (in Japanese) https://www.maff.go.jp/j/jas/jas_kikaku/attach/pdf/yuuki-223.pdf (Accessed October 10, 2021).

According to a consumer survey conducted in December 2020 by the contributors[1], 8.3 percent of consumers have started or increased their purchases of organic foods since the prevalence of COVID-19. The most cited reasons by the respondents were those related to health and immunity, followed by increased use of delivery services and online shopping.

Kyrgyzstan

The establishment of the Department of Organic Agriculture under the Ministry of Agriculture, Water Resources and Regional Development in 2019 led to the creation of a favourable legal atmosphere for the introduction and promotion of organic agriculture in the Kyrgyz Republic.

In the framework of an FAO Project, the National Standard on Agricultural products, Raw Materials and Food with Improved Ecological Characteristics was designed as a transition standard to organic agriculture. It was adopted to implement the Plan of Priority Measures of the Government of the Kyrgyz Republic to ensure social stability and economic sustainability, approved by order of the Prime Minister of the Kyrgyz Republic dated February 25, 2021, No. 117.

The objectives of the legal regulations in the field of production of agricultural products, raw materials and food with improved environmental characteristics include the reduction of the negative impacts of production and consumption on the environment, human health, climate and natural resources; the promotion of sustainable agricultural development; the improvement of the quality of food products; the development of the domestic market for agricultural products, raw materials and food; the increase in the competitiveness of agricultural products, raw materials and food produced in the territory of the Kyrgyz Republic in foreign markets.

Participatory Guarantees System (PGS) was introduced in the country by the BIO-KG Federation of Organic Development, which led to the recognition and inclusion of PGS in the Law on Organic Agricultural Production as an alternative quality assurance system for the internal market. The private organic standard of BIO-KG FOD was included in the IFOAM Family of Standards in 2021.

BIO-KG, the prime mover of organic agriculture in the country, was one of the winners of the 12th Equator Prize by the United Nations Development Programme (UNDP). It also won the Organic Medal of Honour for 2021, a recognition given by Xichong County, China, and IFOAM – Organics Asia to exemplary organic organisations in the Asian region.

Mongolia

The legal environment for organic food and agricultural production in Mongolia has been accomplished. The Parliament of Mongolia passed the Law on Organic Food in April 2016. The Ministry of Food, Agriculture, and Light Industry approved the procedures, methodologies, and permitted list to ensure the law's implementation.

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The National Forum of Organic Food Producers announced the motto of Mongolia's Organic Food and Agriculture sector to be "Think Future Pick Organic" and has set its goal of achieving 5 percent of Mongolian agricultural products certified organic by 2030. The organisation also established the design of the labelling mark.[1]

Currently, a total of 17 PGS and two third-party certification bodies are conducting organic food certification in Mongolia. There are 417 products registered in this system as organic and "in conversion to organic".[2] By logging into the database, consumers can easily contact the manufacturer for information on certified organic and in-conversion organic products that are free from any harmful chemicals or pesticides.

The Ministry of Food, Agriculture and Light Industry is currently developing a draft regulation on "Support and Incentives for Organic Food Producers". The Ministry is aiming that by giving support and incentives to Organic Food Producers, more producers will switch to organic, and the overall organic industry situation in the whole country will improve.

Nepal

It is estimated that the turnover with organic products in Nepal is at least 7 million US dollars[3] per annum, including both local and export markets. The major products exported are tea and coffee, honey, highland beans, buckwheat, root and leafy vegetables, bread and pasta, essential oils and herbs, soap and raw materials for cosmetics and detergents, wild fruit syrups, and fibre for textiles and furnishing. The organic agriculture sector was gaining momentum in Nepal before 2021 when the COVID-19 pandemic swept across the country, dampening this momentum.

The government, too, undertook some good initiatives. Some provincial governments provided support to youth migrant returnees. For example, Province 5 aimed to promote youth entrepreneurship, vegetable farming, beekeeping, fisheries, flower cultivation, and mushroom farming, targeting to increase employment among youth. It also aimed to provide concessional loans and a contract-based land-lease system. In the Karnali Province, 0.5 billion Nepali Rupees[4] was provided for the agricultural sector, including the production of off-season potatoes. The local governments in the province responded by announcing minimum support price for wheat and timely supply of threshers for wheat harvest.

Phillippines

In 2021, the focus was on strengthening organic trading posts all over the country as National Organic Agriculture Program (NOAP) had allocated funds for Organic Agriculture Hubs to be established in the identified areas in the country.

The biggest breakthrough was the inclusion of Participatory Guarantee Systems (PGS) in the national organic regulations. The amended Republic Act (RA) 11511 highlighted

[1] Official site of the Ministry of Food, Agriculture and Light Industry, see https://www.mofa.gov.mn/exp
[2] www.organic.gov.mn
[3] Approximately 6.3 million euros.
[4] Approximately 37.4 million euros

PGS as a second-party certification, hereby allowing PGS groups to label their products as organic. Furthermore, in coordination with the Agricultural Training Institute (ATI) as the extension arm of the Department of Agriculture, a series of group-focused orientations in six regions across the country were conducted to enhance understanding of the basic concepts of PGS.

In Negros Island, the Negros First Organic Technology Center, an accredited farm-tourism site, has been certified as the region's first learning site for organic farming. It is a 10-hectare demonstration farm managed by the province. In 2020, the Provincial Government of Negros Occidental gave a grant of 16 million pesos[1] for organic rice farmers, comprising a 600 square metre warehouse, mechanical dryers and rice grader to improve the quality of their produce further. As of 2021, Negros Occidental has approximately 18'000 hectares of its total agricultural land converted to organic farming.

South Korea[2]

In October 2020, the central government announced its vision of achieving carbon neutrality by 2050. Follow-up plans were announced in August 2021 with the legislation of the basic law on carbon neutrality and the establishment of the Carbon Neutrality Commission. It was announced that there will be a 40 percent increase (over the target announced in 2018) in carbon emissions reduction by the year 2030, and a comprehensive plan to reach carbon neutrality by 2050 was submitted to COP26.[3] The plan received criticism as being too industry-focused and promoting technology and finance to reach its goals.

There was a 2.1 percent increase in the number of farms under environmentally-friendly[1] production in 2020. Organic certified farms took up 30.5 percent of the increase in the farms, bringing up the ratio of organic farms to 2.4 percent of the total in the country. Farms under pesticide-free production decreased by 11 percent compared to the previous year.

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[1] Approximately 0.3 million euros.

[2] Sources for the subchapter on South Korea

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- 2021 General Assembly Documents of the Specific Organic Consumer Cooperatives

[3] The 2021 United Nations Climate Change Conference (COP26) was the 26th United Nations Climate Change conference, held in Glasgow, Scotland, United Kingdom, from 31 October to 13 November 2021. For more information see https://ukcop26.org.

[1] The Environmentally Friendly Promotion Law includes organic and pesticide-free certified products. In 2020, total number of farms under environmentally-friendly production was 59'000 farms.

The market value for environmentally-friendly products (organic + pesticide-free) reached 1.52 trillion won (1.13 billion euros) in 2020, with school meals taking up 33 percent of the market share. Sales of environmentally-friendly and processed food increased on average 13.9 percent in 2020 in the major organic consumer cooperatives (Hansalim, iCOOP, Dure and Happy Coop) with the onset of COVID-19. This was due to the changes in lifestyles and the rising demand for healthier food, home-cooked meals, meal prep kits, online shopping and shopping at local, nearby stores where the government financial support funds can be spent. These cooperatives saw a membership increase of 5.8 percent in 2020.

Furthermore, to counter the impacts of climate change, these cooperatives undertook the "natural resources cycling" campaign. This campaign included activities such as collecting milk cartons, recycling bottles, selling in smaller amounts, upcycling old clothing, improving packaging to be more recyclable and re-useable and decreasing the use of plastic.

For the 2021 "Organic Day" (June 2), under the theme "Let's Eat Organic to Overcome Climate Change", various public events were undertaken throughout the nation. Consumers were invited to be part of rice planting in organic paddy fields and were given rice seedlings that could be planted in pots. About twenty-thousand university students were given organic *bibimbap* (a Korean rice dish with mixed vegetables) to increase awareness that organic farming practices sequester carbon in the soil and are a solution to climate change.

A related symposium was also organised, which brought forth action plans such as the conversion of all rice paddies to environmentally-friendly practices to increase land under environmentally-friendly practices to 30 percent by the year 2030; reduction of chemical fertilisers, pesticides, and antibiotics by 50 percent; conversion to "Integrated crop-livestock recycling farming systems"; and the expansion of public meals.

The government also announced the 5th Environmentally Friendly Agriculture Promotion Five-Year Plan (2021-2025) with the vision of "expanding sustainable agriculture for the environment and future generations" and to increase environmentally friendly farmland to 10 percent by 2025. Other targets are to build up the agricultural base for carbon reduction, expand the sustainable, environmentally friendly agriculture model and establish a system to increase consumption, which would lead to an increase in production.

Vietnam

Based on the national policies that have been issued since 2017 and government programs to promote organic agriculture in Vietnam,[1] more provinces and cities have actively developed local programs and projects to develop organic agriculture.

Organic agriculture in Vietnam is booming with many projects granted by the government, international partners, and the private sector. Participatory Guarantee Systems (PGS) is getting more popular and is replicated in many localities. Currently,

[1] National Organic Standard, Decree on Organic Agriculture, National Organic Agriculture Project 2020-2030

the Vietnam Organic Agriculture Association (VOAA) has recorded 17 PGS groups in 13 provinces, of which five PGS groups are operational while the others are still in their development stages. The products of these PGS groups include vegetables, rice, oranges, grapefruits, etc. PGS brands are sold in the local market.

The year 2021 was a difficult one in the organic market in Vietnam. Lockdowns greatly affected organic farmers, making it very difficult to transport their products to the markets and consumers. Retailers of organic products recorded an increase in sales of organic products, but the supply of products was more difficult due to transportation. Exporters of organic products recorded that despite the high transportation costs (up to 2 to 3 times higher than before the pandemic), the export volume still increased for tea, spices (cinnamon, anise, ginger, chilli, garlic and herbs), but slightly decreased for organic shrimp, due to the decrease in imports to the EU. The main export markets are still Europe, the USA, Canada and Japan.

IFOAM - Organics Asia in 2021

The General Assembly of IFOAM Asia in October 2021 brought great changes in the leadership with the election of four women and three men to the Asia Board. The new board has also become younger, the majority being less than 40 years of age. It is especially noteworthy that four of the new board members are former trainees of the IFOAM Organic Leadership Courses or the Organic Foundation Courses of the Asian Local Governments for Organic Agriculture (ALGOA). These have been instrumental in the establishment of the Organic Youth Forum in Asia.

The Asian Organic Youth Forum organised the People's Food Summit (for the Eastern and Southeast Asian region) on October 16, 2021–a 24-hour global event initiated by Regeneration International and its partners.

The Young Organics-Global Network (YOGN)[1] organised the 1st World Organic Youth Summit under the theme "Following in the Footsteps of Our Organic Pioneers" in October 2021. There were almost four hundred participants from 72 countries and areas.

The 7th ALGOA and 2nd GAOD Summits[2] under the theme "Regenerating More Resilient, Sustainable Local Food Systems" were held as hybrid events in October with participants from over 38 countries and areas.

Despite significant challenges due to the pandemic, the 4th Organic Asia Congress was virtually held in Jakarta, Indonesia, in November under the theme "Asia Go Organic for a Healthier Planet!". It was one of the largest organic events of the year, attracting

[1] Common efforts by the Asian Organic Youth Forum and Young Organics in Europe and launched in 2020.
[2] ALGOA or the Asian Local Governments for Organic Agriculture was initiated by IFOAM-Organics Asia in 2013 with the aim of fostering dialogue and cooperation among Asian local governments for the development of organic agriculture and its related industries. .GAOD or the Global Alliance for Organic Districts is an alliance by ALGOA from Asia and the International Network of Eco Regions (I.N.N.E.R.) from Europe to create synergy between groups working to promote organic regenerative agriculture across the globe.

600 registrants from 34 countries and areas. One of the highlights of the event was the official launching of the "Women in Organic Agriculture in Asia."

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Asia: Current statistics

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Overview

In 2020, the area of organic agricultural land in Asia was over 6.1 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 almost fourteen-fold. Between 2019 and 2020, there was an increase in the organic area of 8 percent. As in previous years, India and China were the countries with the largest organic agricultural area in Asia in 2020. In 2020, India had a total organic agricultural area of nearly 2.7 million hectares. China's organic agricultural area was over 2.4 million hectares. The country with the highest number of organic producers was India, with nearly 1.6 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 2020).

Land use

In 2020, land use information was available for 58 percent of the organic agricultural area in Asia – 44 percent arable crops (over 2.7 million hectares), 14 percent permanent crops (nearly 844'000 hectares), and 0.3 percent permanent grassland/grazing areas (nearly 17'000 hectares). For 42 percent of the organic agricultural land, no land use information was available.

Since 2013, the most important organic *arable crop* has been cereals (mainly rice, wheat, and maize), with almost 1.3 million hectares in 2020, followed by oilseeds (mainly soybeans), with nearly 578'000 hectares, and textile crops (mainly cotton), with over 355'000 hectares. The countries with the largest arable crop areas were China, which reported nearly 1.9 million hectares (mainly cereals and oilseeds), followed by India, with over 415'000 hectares (cotton and soybeans), Thailand, with over 143'000 hectares (mainly rice), and Kazakhstan, with over 107'000 hectares (cereals, textile crops, fallow land, and oilseeds).

- Organic *cereals* were grown on almost 1.3 million hectares, representing 0.4 percent of the total cereal area in Asia and 25.5 percent of the world's organic cereal area. Most organic cereals were grown in China (nearly 1.1 million hectares) and Thailand (nearly 133'000 hectares). The key organic cereals were rice, wheat, and maize. Organic rice represented 43 percent of the total organic cereal area and, together with wheat (19 percent) and grain maize (18 percent), represented 80 percent of the total organic cereal area in Asia. Organic rice was

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mainly grown in China (340'000 hectares), constituting 62 percent of the total organic rice in the region. The largest organic wheat areas were also in China (240'000 hectares), followed by Kazakhstan (over 24'000 hectares), together representing almost all of the total organic wheat area in Asia. The largest organic grain maize areas were in China (230'000 hectares), representing almost all of the organic grain maize area in Asia.

- Organic **oilseeds** were grown on almost 578'000 hectares, representing one percent of the total oilseeds area in Asia and 32.7 percent of the world's organic oilseeds area. Most organic oilseeds were grown in China (over 427'000 hectares) and India (130'000 hectares). The key organic oilseeds were soybeans. Organic soybeans represented 74 percent of the total organic oilseeds area in Asia. Organic soybeans were mainly grown in China (almost 292'000 hectares) and India (130'000 hectares), together representing 99 percent of the total organic soybeans area in the region.
- Organic **textile crops** were grown on over 355'000 hectares, representing 1.3 percent of the total textile crops area in Asia and 57.6 percent of the world's organic textile crops area. Most organic textile crops were grown in India (over 285'000 hectares). The key organic textile crop was cotton. Organic cotton represented 98 percent of the total organic textile crops area in Asia. Organic cotton was mainly grown in India (over 285'000 hectares), representing 82 percent of the total organic cotton area in the region.

The most important organic **permanent crops** were coconuts, with over 236'000 hectares, and tea, with 150'000 hectares. The countries with the largest permanent crop areas were China, which reported over 363'000 hectares (tea, temperate fruit, and nuts), and the Philippines, which reported over 181'000 hectares (mainly coconuts).

- Organic **coconuts** were grown on over 236'000 hectares, representing 2.5 percent of the total coconuts area in Asia and 80.2 percent of the world's organic coconut area. Most organic coconuts were grown in the Philippines (over 174'000 hectares), representing 74 percent of the total organic coconut area in the region.
- Organic **tea** was grown on 150'000 hectares, representing 3.3 percent of the total tea area in Asia and 83.9 percent of the world's organic tea area. Most organic tea was grown in China (125'000 hectares), representing 83 percent of the total organic tea area in the region.

Wild collection

In 2020, over 3.5 million hectares of organic wild collection were reported in Asia. Unfortunately, detailed data was available for less than one percent of the reported area. India and China were the countries in the region with the largest organic wild collection area, with each of them reporting nearly 1.7 million hectares.

Producers

In 2020, over 1.8 million organic producers were reported in Asia. India was the country with the highest number of organic producers (almost 1.6 million), followed by

Thailand (nearly 97'000). 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.

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. Ten 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 12.5 billion euros of organic products were sold in Asia in 2020. For China, over 10.2 billion euros were reported for 2020, and it is the country with 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 nearly 391 million euros. More information about the Asian market is available in the chapter about the global market from Amarjit Sahota (page 140).

For more information about the Asian figures, see data tables for Asia, page 218.

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Organic Agriculture in Asia: Graphs

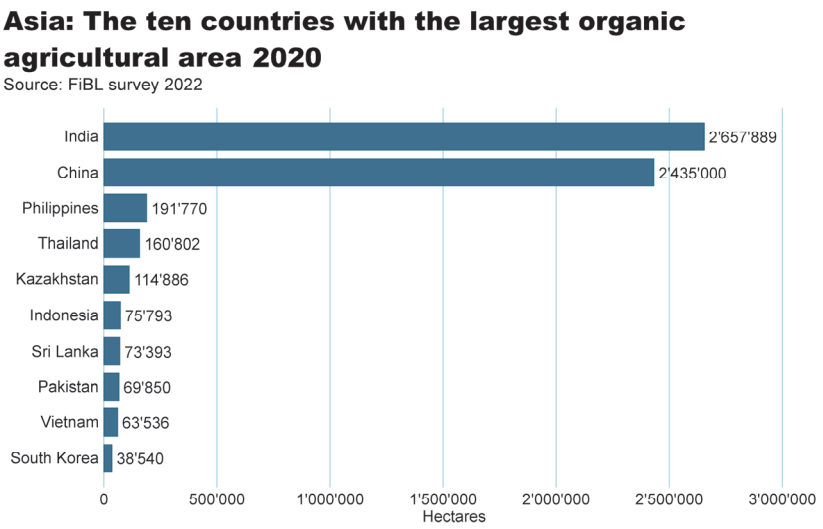


Figure 63: Asia: The ten countries with the largest organic agricultural area 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

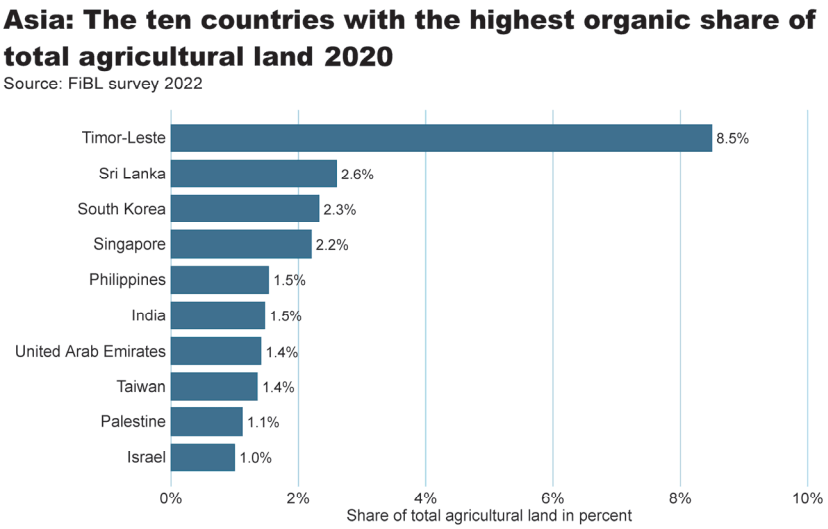


Figure 64: Asia: The countries with the highest organic share of total agricultural land 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

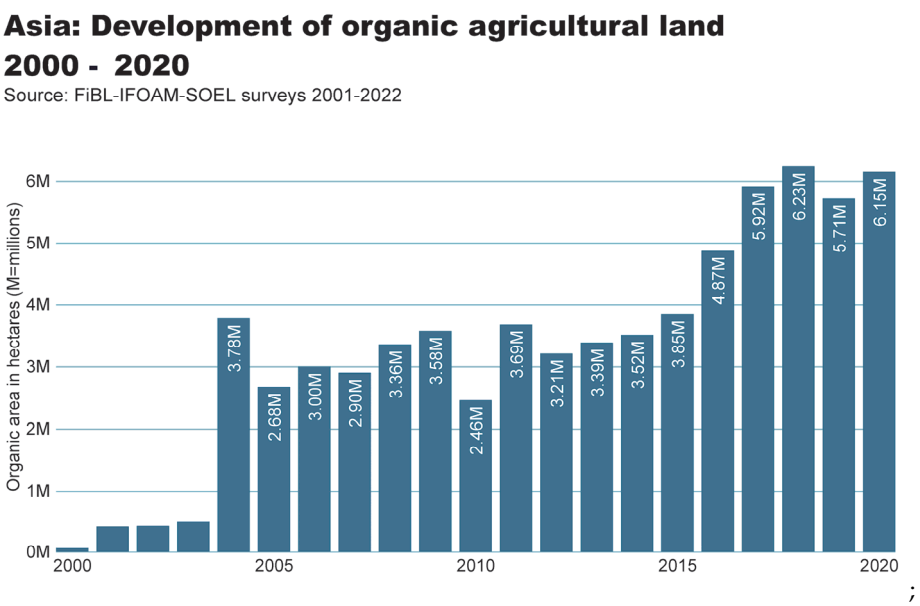


Figure 65: Asia: Development of organic agricultural land 2000 to 2020

Source: FiBL-IFOAM-SOEL surveys 2001-2022; based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

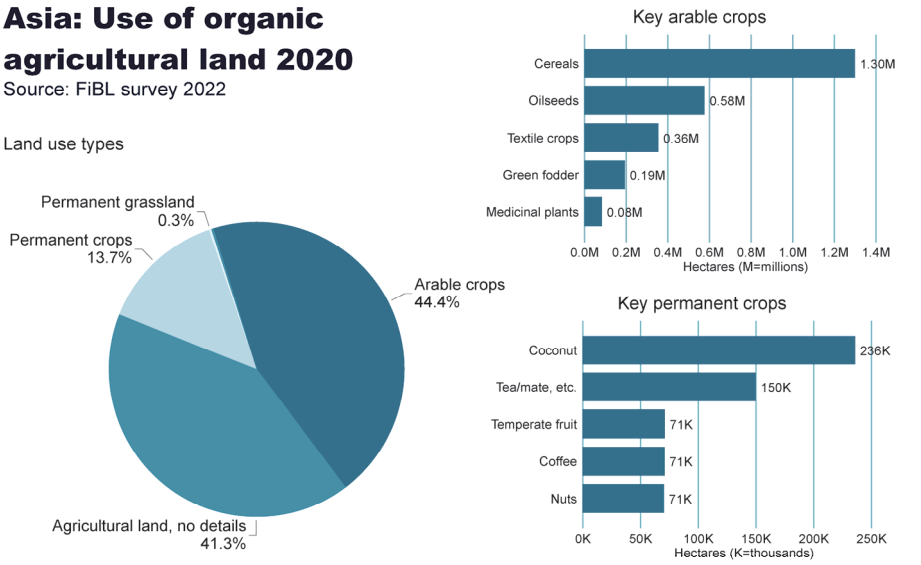


Figure 66: Asia: Use of organic agricultural land 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Organic Agriculture in Asia: Tables

Table 55: Asia: Organic agricultural land, organic share of farmland, producers 2020

Country/Territory	Area [ha]	Organic share [%]	Producers [no.]
Afghanistan	98	0.0003%	1
Armenia	566	0.03%	29
Azerbaijan	38'080	0.8%	446
Bangladesh	504	0.01%	
Bhutan	4'095	0.8%	1'265
Cambodia	35'879	0.6%	8'893
China	2'435'000	0.5%	13'318
Georgia	1'572	0.1%	1'076
India	2'657'889	1.5%	1'599'010
Indonesia	75'793	0.1%	17'836
Iran (Islamic Republic of)	11'916	0.03%	
Iraq	63	0.001%	
Israel	6'287	1.0%	344
Japan	11'992	0.3%	3'678
Jordan	1'446	0.1%	23
Kazakhstan	114'886	0.1%	294
Kuwait	33	0.02%	1
Kyrgyzstan	30'259	0.3%	1'144
Lao People's Democratic Republic	3'266	0.1%	871
Lebanon	1'715	0.3%	122
Malaysia	1'276	0.01%	30
Mongolia	241	0.0002%	314
Myanmar	10'143	0.1%	68
Nepal	9'361	0.2%	983
Oman	4	0.0003%	
Pakistan	69'850	0.2%	934
Palestine	5'218	1.1%	2'679
Philippines	191'770	1.5%	11'906
Republic of Korea (South Korea)	38'540	2.3%	23'750
Saudi Arabia	26'632	0.02%	312
Singapore	15	2.2%	
Sri Lanka	73'393	2.6%	1'990
Taiwan	10'789	1.4%	4'117
Tajikistan	11'818	0.2%	166
Thailand	160'802	0.7%	96'673
Timor-Leste	32'311	8.5%	3
United Arab Emirates	5'419	1.4%	152
Uzbekistan	3'781	0.01%	26
Vietnam	63'536	0.5%	17'174
Total*	**6'146'235**	**0.4%**	**1'809'628**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322
**Total number includes data for countries with less than three operators.*

Table 56: Asia: All organic areas 2020

Country/ Territory	Agri-culture [ha]	Aqua-culture [ha]	Wild collection [ha]	Other non agri. land [ha]	Total [ha]
Afghanistan	98				98
Armenia	566		3'652		4'218
Azerbaijan	38'080	573	2'126		40'779
Bangladesh	504	5'781			6'285
Bhutan	4'095		2'223		6'318
Cambodia	35'879				35'879
China	2'435'000		1'651'500		4'086'500
Georgia	1'572				1'572
India	2'657'889		1'681'296		4'339'185
Indonesia	75'793	795	230		76'817
Iran	11'916		50'219	20'000	82'135
Iraq	63				63
Israel	6'287		4		6'291
Japan	11'992				11'992
Jordan	1'446				1'446
Kazakhstan	114'886				114'886
Kuwait	33				33
Kyrgyzstan	30'259		11'449		41'708
Lao P.D.R.	3'266				3'266
Lebanon	1'715		258		1'972
Malaysia	1'276				1'276
Mongolia	242				242
Myanmar	10'143	20			10'163
Nepal	9'361		24'422		33'783
Oman	4				4
Pakistan	69'850				69'850
Palestine	5'218				5'218
Philippines	191'770				191'770
South Korea	38'540				38'540
Saudi Arabia	26'632				26'632
Singapore	15				15
Sri Lanka	73'393				73'393
Taiwan	10'789				10'789
Tajikistan	11'818				11'818
Thailand	160'802	462	90'716	5'638	257'618
Timor-Leste	32'311				32'311
United Arab Emirates	5'419				5'419
Uzbekistan	3'781				3'781
Vietnam	63'536	100'000	12'450		175'986
Total	**6'146'235**	**107'631**	**3'530'544**	**25'638**	**9'810'050**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Table 57: Asia: Land use in organic agriculture 2020

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		2'517'382
Arable land crops	Cereals	1'299'939
	Dry pulses and protein crops for the production of grain	79'628
	Fallow land, crop rotation	31'347
	Fresh vegetables and melons	52'199
	Industrial crops	20'400
	Medicinal and aromatic plants	84'509
	Mushrooms and truffles	45
	Oilseeds	577'955
	Plants harvested green	194'592
	Root crops	2'865
	Strawberries	34
	Sugarcane	6'361
	Textile crops	355'441
	Arable crops, no details/other	25'781
Arable land crops Total		2'731'096
Cropland, no details		23'104
Other agricultural land		14'317
Permanent crops	Berries	118
	Citrus fruit	15'960
	Cocoa	357
	Coconut	236'119
	Coffee	70'998
	Fruit	54'153
	Fruit of temperate climate zones	71'272
	Fruit, tropical and subtropical	62'067
	Fruit/nuts/berries	1'701
	Grapes	15'020
	Medicinal and aromatic plants, permanent	26'249
	Nuts	70'510
	Olives	6'584
	Tea/mate, etc.	150'068
	Permanent crops, other	62'495
Permanent crops		843'673
Permanent grassland		16'665
Total		**6'146'235**

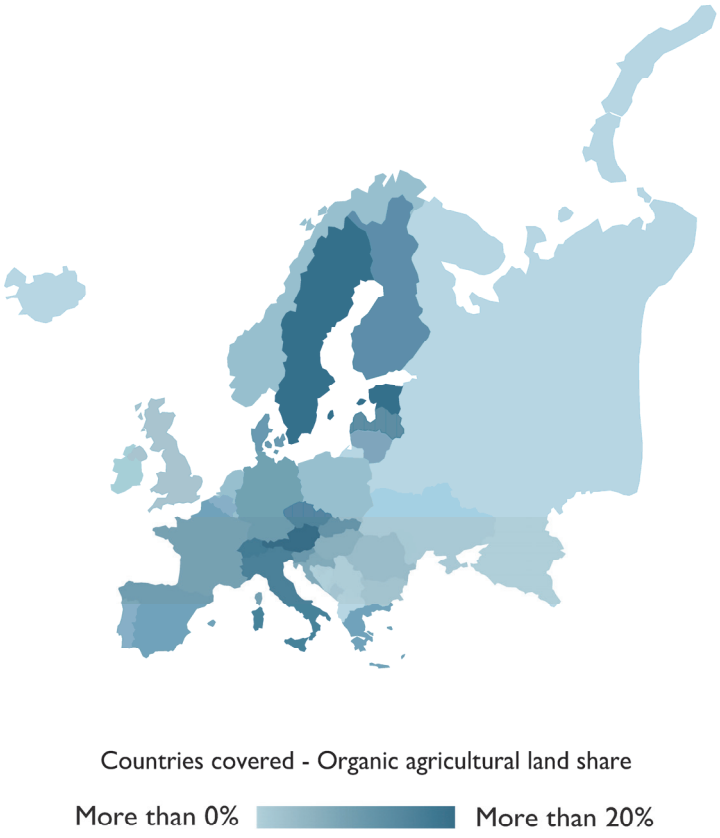
Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Table 58: Asia: Use of wild collection areas 2020

Land use	Area [ha]
Apiculture	39'564
Berries, wild collection	4
Nuts, wild collection	258
Wild collection, no details	3'490'718
Total	3'530'544

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

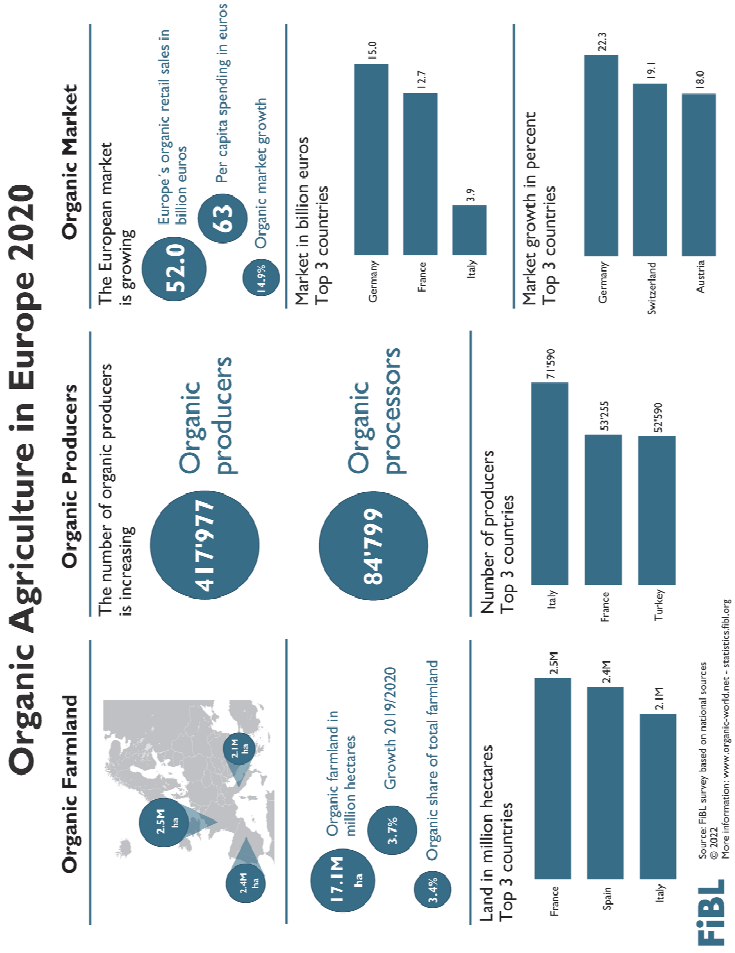
Europe



Map 4: Organic agricultural land in the countries of Europe 2020

Source: FiBL survey 2022 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 322

Infographic



Infographic 5: Organic Agriculture in Europe 2020

Source FiBL survey 2002

Organic in Europe: Recent Developments

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Like 2020, 2021, with the continuing COVID-19 crisis, was another special year for the organic sector. The consolidated data for 2020 show particularly strong growth of retail sales, which were in the double digits in several countries. Should this trend continue post-pandemic, 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 per cent by 2030 will be reached.

European Union: Growth of organic area and retail sales 2000-2020 compared

Source: FiBL-AMI surveys 2006-2022

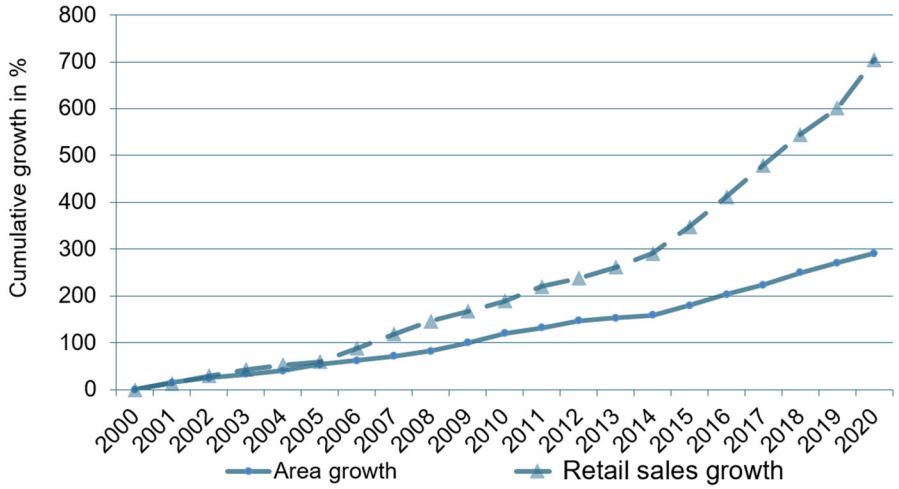


Figure 67: European Union: Growth of organic farmland and retail sales 2000–2020 compared

Source: FiBL-AMI surveys

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While retail sales grew to an impressive 44.7 billion euros in the European Union (EU), the organic farmland area did not grow as fast, increasing by 5.3 per cent. The latest data for Europe show that organic farmland has reached about 17.1 million hectares (EU: 14.9 million hectares) or a share of around 3.4 per cent (EU: 9.2 per cent).

While in 2020, Austria had already reached an organic farmland share of 26.5 per cent and Estonia and Sweden 22.3 and 20.4 per cent, respectively; however, many Member States still have less than ten per cent. For EU organic agriculture to reach the 25 per cent goal by 2030, stronger annual growth will be needed than in 2020 (Figure 67).

Apart from strong consumer interest, political support measures, including a good regulatory framework, adequate support under the common agricultural policy (CAP), action plans and support for research and knowledge building will be crucial to achieving this goal.

New EU regulation enters into application

In June 2018, the new EU regulation 2018/848[1] on the production and labelling of organic products was published. The new EU organic regulation was initially set to apply beginning 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 was adopted in 2018 represents the "Basic Act". The development of secondary legislation took place from June 2018 to December 2021. This means that many details of the text have been developed and adopted in the form of delegated or implementing regulations. At the moment of writing, the whole set of regulations is composed of the basic regulation (EU) 2018/848 integrated by 15 delegated regulations and seven implementing regulations. More will follow.

Main changes of the production side

The scope has been enlarged and now includes products closely linked to agriculture, such as beeswax, sea salt, wool and others.

- The concept of soil-bound cultivation is strengthened with few exceptions.
- Concerning plant reproductive material (e.g. seed), the use of heterogeneous material and varieties adapted to organic farming is encouraged.
- Rules for poultry have been integrated with additional requirements, such as on pop-holes and limits to the multi-level systems. Rules for parent poultry and pullets as well as for rabbits and deer have been added.
- Where there are changes that require structural interventions, transitional rules are provided.
- In aquaculture, the possibility of using non-organic juveniles is very limited.

[1] Regulation (EU) 2018/848 of the European Parliament and of the Council of 30 May 2018 on organic production and labelling of organic products and repealing Council Regulation (EC) No 834/2007; http://data.europa.eu/eli/reg/2018/848/oj

[2] Regulation (EU) 2020/1693 of the European Parliament and of the Council of 11 November 2020 amending Regulation (EU) 2018/848 on organic production and labelling of organic products as regards its date of application and certain other dates referred to in that Regulation (Text with EEA relevance); http://data.europa.eu/eli/reg/2020/1693/oj

Main changes on the food processing side

- The use of natural flavourings is restricted to a few categories, and rules for organic flavourings are established.
- The use of ion exchange and adsorption resin techniques is only allowed for baby food and wine products. Engineered nanomaterials are also banned.
- The flexibility regarding the origin of the ingredients for the indication of origin passes from two to five per cent.
- After a transitional period, there will be a list of cleaning and disinfection products allowed to be used in food processing and storage.

Main changes on control and certification

- Low-risk operators will be exempt from the mandatory annual physical inspection visit, which can be performed every 24 months. Such exemption applies only to operators in the EU.
- In any case, verification of compliance is required every 12 months.
- As for the certificate, there are mandatory models to be considered for both EU and non-EU operators.
- New approaches to dealing with suspected non-compliances and residues are established for operators and control actors.
- New rules for group certification are established and are very detailed, with some significant changes for operators in the Global South.
- The group certification system may also be applied to small farmers in the EU and worldwide. According to the previous regulation, group certification was only possible for countries in the Global South.

Main changes on international trade and imports

The current equivalency agreements with 14 Third Countries have to be renegotiated under trade agreements within 5 years. The control bodies recognised for equivalency need to be recognised for compliance within three years. In practice, the requirements of the new EU organic regulation will apply to Third Countries with a one- to one-and-a-half-year delay compared to the EU. Also, new rules applying at the EU borders for imported products apply.

New CAP regulations voted

In June 2018, the European Commission launched its proposal for the Common Agricultural Policy (CAP) post-2020, and the new CAP regulations were adopted by the European Parliament in Plenary only on 23 November 2021. The delegated and implemented acts of these new CAP regulations (2023–2027) will be voted on during the first trimester of 2022. The regulations will be active from 1 January 2023 to 31 December 2027.

The new CAP gives more flexibility to Member States in implementing 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 farming 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,[1] many more farmers could make an even larger contribution to the environment, climate, and rural communities beyond 2020.

Nonetheless, the CAP's new green architecture appears too weak to address the environmental issues societies face. Indeed, it will consist of the new eco-schemes, which will account for 25 per cent of the first pillar's budget. These eco-schemes will be mandatory for the Member States but voluntary for farmers; this is less binding than the current greening measures. Eco-schemes can offer a good opportunity to compensate farmers whose farming practices benefit biodiversity and the environment. However, the definition of the eco-schemes has been left in the hands of Member States and, in several countries, is not ambitious enough to favour these kinds of farming practises, including organic farming (see IFOAM Organics EU 2021). The rest of the CAP's new green architecture consists of nine good agricultural and environmental conditions (GAECs), and 35 per cent of the second pillar's budget is dedicated to agri-environmental and climate measures (AECMs). The organic movement defended ringfencing of at least 70 per cent 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.

Besides, the new CAP will include improvements in social issues. The organic movement welcomes the new social conditionality (mandatory as of 2025) that will ensure enhanced farmers' and farm workers' rights.[2]

Finally, with the European Green Deal (European Commission 2019c) and the publication of the EU Farm to Fork (European Commission 2020a) and Biodiversity Strategies (European Commission 2020b) in May 2020 (see also below), the European Commission has put forward clear objectives for transitioning to sustainable food systems by 2030. But since the CAP plays a critical role in providing the means to reach these objectives, it is essential that the CAP 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, the Biodiversity strategy and the target to reach 25 per cent of organic land in Europe by 2030 (see subsequent chapter). During the CAP negotiations, Member States actively opposed a clear legal link between the CAP and the Green Deal. In the end, the

[1] The Common Agricultural Policy of the European Union consists of two pillars:
› First pillar of the CAP: I — Common organisation of the markets (CMO) in agricultural products
› Second pillar of the CAP: rural development policy.
More information is available at https://www.europarl.europa.eu/factsheets/en/section/196/the-common-agricultural-policy-cap-

[2] The new social conditionality is based on current four EU legislative frameworks (Directive 2019/1152 on Transparent and Predictable Working Conditions, Directive 2009/104/EC on Minimum Safety and Health Requirements for use of work equipment by workers, Directive 89/391/EEC on Improvement of Safety and health of workers, Regulation 492/2011 on Freedom of movement for workers within the EU).

Commission Implementing Regulation (EU) 2021/2289[1] (to be voted on by the Parliament in early 2022) specifies the need for Member States to provide "an explanation of the national contribution to achieving the Union's targets for 2030" set out in the Farm to Fork Strategy and the Biodiversity Strategy with a view of allowing the European Commission to assess the consistency and contribution of the proposed CAP Strategic Plan as well as the Union's environmental and climate legislation and commitments.

A recent briefing by IFOAM Organics Europe (2021) on the state of play of CAP national Strategic Plans showed that the level of ambition to develop and support organic farming is not high enough in many Member States and that unless major changes in the measures and budget occurred, the Strategy Plans (SPs) would not allow reaching the Farm to Fork Strategy's target of 25 per cent organic land by 2030. Most Member States submitted their draft plans by 31 December 2021. The European Commission is expected to send its "observation letters" and recommendation to Member States at the end of March 2022 and approve the plans by the end of 2023.

The European Green Deal & the Farm to Fork strategy: shaping a more sustainable EU agenda[2]

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

The European Green Deal (European Commission 2019c) is a new growth strategy unveiled by the European Commission in December 2019. This deal is one priority of the Von der Leyen Commission (2019–2024) and aims for Europe to be the first climate-neutral continent by becoming a modern, resource-efficient economy.

The European Green Deal covers several sectors in which the EU can improve sustainability, including the energy, transport and agri-food sectors. The Farm to Fork (European Commission 2020a) and the EU biodiversity strategies (European Commission 2020b), both a part of the European Green Deal, were unveiled in May 2020 and aim to achieve the Deal's goals for the agri-food sector. 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). 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.

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 recognising that organic farming can be part of the solution in addressing the environmental challenges we face, as the Farm

[1] The Commission Implementing Regulation (EU) 2021/2289 of 21 December 2021 laying down rules for the application of Regulation (EU) 2021/2115 of the European Parliament and of the Council on the presentation of the content of the CAP Strategic Plans and on the electronic system for the secure exchange of information, C/2021/9601, is available at https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32021R2289

[2] For more details see article on organic in Europe in the 2021 edition of this yearbook, available at https://www.organic-world.net/yearbook/yearbook-2021/pdf.html

to Fork Strategy includes a target that aims to achieve **at least 25 per cent of the EU's agricultural land under organic farming by 2030** and a significant increase in organic aquaculture. To reach the 25 per cent target, comprehensive policy support for organic farming is needed across the EU to increase the supply and demand for organic products.

As part of the Farm to Fork strategy, the European Commission pledged to review the EU promotion programme for agricultural and food products to enhance its contribution to **sustainable production and consumption**. Starting from 2021, about half of the yearly budget aimed at the promotion of European agri-food products, for example, via campaigns in the internal market or Third Countries, was ringfenced for organic or other sustainable products.

In March 2021, the EU published its **new action plan on organic farming** (European Commission 2021). With its 23 actions, the objectives of this organic action plan are threefold: (1) Contribute to increasing the share of organic farming in the EU, (2) Expand the accessibility of organic food, and (3) Help Member States stimulate the supply of and demand for organic products. The EU encourages the adoption of national organic action plans to ensure better uptake of these objectives.

Research

Organic farming research is funded under European and national research programmes as well as national organic action plans. Since the mid-1990s, several organic research projects focussing on organic agriculture have been funded by the framework programme Horizon 2020[1].

In 2021, the CORE Organic network, which joins forces with the EU Member States to fund transnational research projects, launched its third call for research proposals: "Organic farming systems for improved mixed plant and animal production[2]." The funding network consists of 13 funding bodies from 13 countries, and the call board selected five project proposals on the subtopics "Robust and resilient mixed animal farming systems" and "Support for robust and resilient crop production systems" that started in autumn 2021. Collaboration with the European Technology Platform TP Organics[3] and other relevant sector players has helped ensure the voice of transnational organisations representing farmers, industry and civil society have been taken into account. With the Organic Eprints[4] open-access repository, a shared knowledge reservoir for effective dissemination of research outcomes has been created. The CORE

[1] OK-Net Arable, OK-Net EcoFeed, LIVESEED, ECOBREED, and BRESOV (on organic seed and plant breeding) as well as RELACS and Organic-PLUS (on alternatives for contentious inputs used in organic farming). In 2019, PPilow on animal welfare in organic farming and a thematic network on organic fruit production, BioFruitNet started. Weblinks: 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] https://projects.au.dk/coreorganiccofund/core-organic-2021-call/

[3] https://tporganics.eu/

[4] https://www.orgprints.org/

Organic projects outcomes are archived on Organic Eprints, which has more than 30'000 entries (see also Willer/Rasmussen 2019).

Organic Farm Knowledge - YouTube Channel

In December 2018, the Horizon 2020-funded project OK-Net Ecofeed launched the extended knowledge platform Organic Farm Knowledge[1], initially set up in the framework of OK-Net Arable. The platform aims to promote information exchange and share practical solutions among farmers across Europe. Organic Farm Knowledge is constantly working to evolve, keep the tools up to date, increase its reach, and make its content available in the national languages and through different channels. Most recently, a new YouTube channel was introduced, which allows access to a diverse collection of video content from the Organic Farm Knowledge Platform via a different well established, audio-visual and interactive channel. A big advantage of YouTube is the topic divisions, making it easier for practitioners to find specific content. Videos on crop production, soil, animal husbandry, farm management, food chain management and "Environment and Society" are already available. In addition to the Organic Farm Knowledge platform, the channel offers a good educational opportunity to acquire knowledge on certain topics and have them explained visually and memorably. The YouTube channel is constantly being expanded, and, in the future, there will also be new playlists that sort the content by language. Similarly, further work is being done to make the content on the platform itself accessible in several languages. A video introducing Organic Farm Knowledge was created to better explain the online platform, its offers and the wide range of tools for organic farming. The video will soon be available in several languages.

Science Day 2021 at Biofach

TP Organics' Science Day at BIOFACH VIVANESS 2021 eSpecial on 19 February attracted more than 150 participants. They learned more about current research projects funded by the CORE Organic network, which joins forces of the EU Member States to fund transnational research projects[2], and about opportunities for organic companies in Horizon Europe, the new research framework programme of the European Union. A review of this event is available on the TP Organics website.[3]

Organic Innovation Days

The Organic Innovation Days 2021, TP Organics' annual public event and the only EU event on research and innovation for organics, took place online for the second time on 30 November and 1 December 2021. Under the title "Better inputs for organic agriculture", the event brought together almost 150 participants and showed that research is well on track to make organic farming even more sustainable, although continued research is needed. TP Organics collaborated with the two Horizon 2020-

[1] https://organic-farmknowledge.org/
[2] https://projects.au.dk/coreorganiccofund/
[3] https://tporganics.eu/tp-organics-science-day-2021/

funded EU projects, RELACS[1] (coordinated by the Research Institute of Organic Agriculture FiBL) and Organic-PLUS[2] (coordinated by Coventry University), both of which aim to reduce the use of inputs that are considered controversial in organic farming, such as copper, mineral oil and antibiotics. A full event review is available on the TP Organics website.[3]

Horizon Europe

Horizon Europe[4], the EU's ninth Framework Programme for research and innovation (R&I), with a proposed budget of 95.5 billion euros for 2021–2027, was launched in 2021. Cluster 6 of Horizon Europe, "Food, Bioeconomy, Natural Resources, Agriculture and Environment",[5] with a total budget of 8.952 billion euros, aims at reducing environmental degradation; halting and reversing the decline of biodiversity on land, inland waters and sea; and better managing natural resources through transformative changes to the economy and society in urban and rural areas.

Thanks to TP Organics, the first Work Programme (2021–2022)[6] 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, 20 calls mention the word "organic". The new Organic Action Plan for the EU (European Commission 2021) foresees an allocation of at least 30 per cent of the budget for research and innovation actions in the fields of agriculture, forestry and rural areas to topics specific to or relevant for the organic sector.

Among the new instruments under Horizon Europe, TP Organics welcomes the planned soil health and food mission, "A Soil Deal for Europe"[7], which will support the upscaling of organic farming and agroecology. Better protection of our soils is the urgently-needed basis of food production, and sustaining soil health is at the heart of the organic approach. Living labs, a user-centred research concept that often operates in a territorial context, will be funded through annual calls under the Horizon Europe Work Programme 2023–2024 (to be published early 2023). TP Organics contributed to drafting the proposals for the European research and innovation (R&I) partnership on

[1] https://relacs-project.eu/
[2] https://organic-plus.net/
[3] https://tporganics.eu/organic-innovation-days/
[4] https://ec.europa.eu/info/research-and-innovation/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe_en
[5] https://ec.europa.eu/info/research-and-innovation/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/cluster-6-food-bioeconomy-natural-resources-agriculture-and-environment_en
[6] https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2021-2022/wp-9-food-bioeconomy-natural-resources-agriculture-and-environment_horizon-2021-2022_en.pdf
[7] https://ec.europa.eu/info/research-and-innovation/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/missions-horizon-europe/soil-health-and-food_en

agroecology living labs and research infrastructures[1] and the European Partnership for Safe and Sustainable Food Systems[2]. Both are expected to start in 2023/24 and be co-funded by the European Commission and the Member States. The Strategic Research and Innovation Agendas for these partnerships will be developed in 2022; R&I activities will contribute to reaching the Farm to Fork Strategy. Organic farmers in Europe are the pioneers of agroecology, implementing its principles by definition and legislation; investing in organic research means investing in sustainable farming system solutions that fulfil all targets of the Farm to Fork Strategy.

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[1] European research and innovation (R&I) partnership on agroecology living labs and research infrastructures: https://ec.europa.eu/info/research-and-innovation/research-area/agriculture-forestry-and-rural-areas/partnership-agroecology_en

[2] European Partnership for Safe and Sustainable Food System: https://scar-europe.org/index.php/food-main-actions/food-systems-partnership

Europe and the European Union: Key indicators 2020

Indicator	Europe	European Union[1]	Top 3 countries Europe
Organic farmland	17.1 million hectares (ha)	14.9 million ha	France (2.5 million ha) Spain (2.4 million ha) Italy (2.1 million ha)
Organic share of total farmland	3.4 %	9.2 %	Liechtenstein (41.6%) Austria (26.5%) Estonia (22.4%)
Increase in organic farmland 2019-2020	0.6 million ha	0.7 million ha	France (+0.31million ha) Italy (+0.10 million ha) Germany (+0.09 million ha)
Relative increase in organic farmland 2019-2020	3.7%	5.3%	Kosovo: (+54.8 %) Malta (+21.8 %) Romania (+18.6 %)
Land use	Arable crops: 8.1 million ha Permanent crops: 1.9 million ha Permanent grassland: 6.7 million ha	Arable crops: 6.7 million ha Permanent crops 1.7 million ha Permanent grassland: 6.3 million ha	
Top arable crop groups	Cereals: 3.0 million ha Green fodder: 2.7 million ha Oilseeds: 0.8 million ha	Green fodder: 2.5 million ha Cereals: 2.4 million ha Dry pulses: 0.5 million ha	Largest arable areas: France (1.4 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: 0.4 million ha	Olives: 0.6 million ha Grapes: 0.4 million ha Nuts: 0.3 million ha	Largest permanent crop areas: Spain (0.7 million ha) Italy (0.5 million ha) Turkey (0.2 million ha)
Wild collection area	9.9 million ha	6.0 million ha	Finland (5.5 million ha) Kosovo (1.6 million ha) Albania (0.8 million ha)
Producers	417'977	349'499	Italy (71'590 1) France (53'255) Turkey (52'590)
Processors	84'799	78'262	Italy (22'689) France (19'311) Germany (17'350)
Importers	6'792	5'820	Germany (1'916) France (662) Switzerland (544)
Retail sales	52.0 billion euros	44.8 billion euros	Germany (14'990 million euros) France (12'699 million euros) Italy (3'872 million euros)
Growth of retail sales 2019-2020	14.9%	15.1%	Germany (22.3 %) Switzerland (19.1%) Austria (18.0%)
Organic share of the total market	No data	4.7%	Denmark (12.1 %) Switzerland (10.4 %) Austria (9.3 %)
Per capita consumption	63.3	101.8 euros	Switzerland (418 euros) Denmark (384 euros); Luxembourg (284 euros)

Source: FiBL-AMI survey 2022.
For detailed data sources, see annex

[1] Please note that the 2020 data for the European cover the 27 countries that were members of the European Union in 2020. The data exclude the United Kingdom and a direct year-to-year comparison of EU level data shown in previous editions of this yearbook is therefore not possible.

Organic Farming and Market Development in Europe and the European Union

JAN TRÁVNÍČEK,[1] HELGA WILLER[2] AND DIANA SCHAACK[3]

In 2020, the organic sector's development in Europe was characterised by continued growth in all key indicators. In 2020, the organic market grew substantially more than the organic area, thus continuing the past several years' trend at an increased rate. A lot of this exceptional, often double-digit growth must be attributed to the pandemic. While it is good to see strong market growth, the organic farmland area must continue growing faster to reach the 25 percent organic area share goal by 2030, as set out by the European Commission (2020) in its Farm to Fork strategy.

Please note that the European Union (EU) data are not comparable to what was communicated in this yearbook's previous editions. All EU data (including historical data) in this volume refer to the EU 27, that is, the 27 countries that were member states of the EU in 2020.

1 Key facts and figures: Production and market highlights

More than 17 million hectares of farmland were organic in Europe in 2020 – France had the largest area

In Europe, 17.1 million hectares were managed organically in 2020 (EU: 14.9 million hectares). With almost 2.5 million hectares, France became the new number one in terms of farmland under organic management, followed by Spain (2.4 million hectares), Italy (2.1 million hectares) and Germany (1.7 million hectares). More than half of the European organic farmland is in these four countries.

European organic farmland increased by 0.7 million hectares

Organic land increased by more than 0.6 million hectares in Europe (with a major increase in farmland in France and Ukraine and a decrease in Turkey) and by more than 0.7 million hectares in the EU, representing an increase of 3.7 percent in Europe and 5.3 percent in the EU. Growth was lower than in the previous year. To achieve the EU's goal of 25 percent organic farmland by 2030, a higher annual growth rate is needed.

Liechtenstein is the country with the highest organic area share in the world

Organic farmland in Europe constitutes 3.4 percent of the total agricultural land and 9.2 percent in the EU. In Europe (and globally), Liechtenstein has the highest organic share of all farmland (41.6 percent), followed by Austria, the country in the EU with the highest organic share of agricultural land (26.5 percent). Furthermore, EU countries that

[1] Jan Trávníček, Czech Organics, Staré Město, Czech Republic, www.czechorganics.com
[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

are already quite close to the goal include Estonia (22.4 percent) and Sweden (20.4 percent).

Organic producers, processors and importers: Modest growth

There were almost 420'000 organic producers in Europe (almost 350'000 in the European Union), with the largest numbers in Italy (71'590). While the number of producers decreased by 2.5 percent in Europe (mainly due to fewer producers reporting from Turkey), it increased by a modest 3.3 percent in the European Union.

There were 84'799 organic processors in Europe (+3.8 percent compared to 2019) and 78'262 in the European Union (+3.4 percent). The country with the largest number of processors was Italy (22'689).

The number of importers grew faster than the number of producers and processors: Almost 6'800 importers (+5.2 percent) were counted in Europe and more than 5'800 in the European Union (+5.3 percent). Germany had the highest number of importers (1'916).

Retail sales passed the 50 billion euro mark – Extraordinary market growth

Organic retail sales in Europe were valued at 52.0 billion euros (44.8 billion euros in the European Union). The European Union represents the second-largest single market for organic products after the United States. With 14.99 billion euros in retail sales, Germany is the biggest market in Europe and the second-largest in the world.

The European and EU organic markets recorded a record growth rate of 15.0 percent – the highest in the last decade. The highest growth was observed in Germany (+22.3 percent). From 2011–2020, Europe's and the European Union's organic market values more than doubled.

European consumers spent 63.3 euros on organic food per person in 2020 (EU 101.8 euros). Per capita, consumer spending on organic food has doubled in the last decade. Swiss and Danish consumers spent the most on organic food (418 and 384 euros, respectively).

The 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 (13.0 percent). Austria reached 11.3 percent, and Switzerland reached 10.8 percent.

Organic imports – Ecuador is the largest supplier

Data on organic imports to the European Union in 2020 show that 2.8 million metric tons of organic products were imported. The largest supplier was Ecuador; the key product group was tropical fruits. The largest importer was the Netherlands.

2. Organic agricultural land: Area, organic share of total, growth

Table 59: Europe: Organic agricultural land in Europe and the European Union 2020

	Organic area [million ha]	Organic share [%]	Change 2019-2020 [%]	Change 2019-2020 [million ha]	Change 2011-2020 [%]	Change 2011-2020 [million ha]
European Union	14.9	9.2%	5.3%	+0.7	62.1%	7.5
Europe	17.1	3.4%	3.7%	+0.6	68.4%	6.0

Source: FiBL-AMI survey based on Eurostat and national data sources. For country details, see Table 65.

2.1 Organic agricultural land

In 2020, 17.1 million hectares were farmed organically in Europe and 14.9 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 farmland areas were France (15 percent of Europe's organic farmland and taking the lead from Spain), followed by Spain, Italy and Germany. Almost half of Europe's organic farmland (and almost 60 percent of the European Union's organic farmland) was in these countries (Figure 68). A bit more than one-fifth of the world's organic farmland was in Europe (22 percent). While in former years Europe held one-quarter of the global organic farmland, it went down due to an impressive area increase in Australia in 2017.

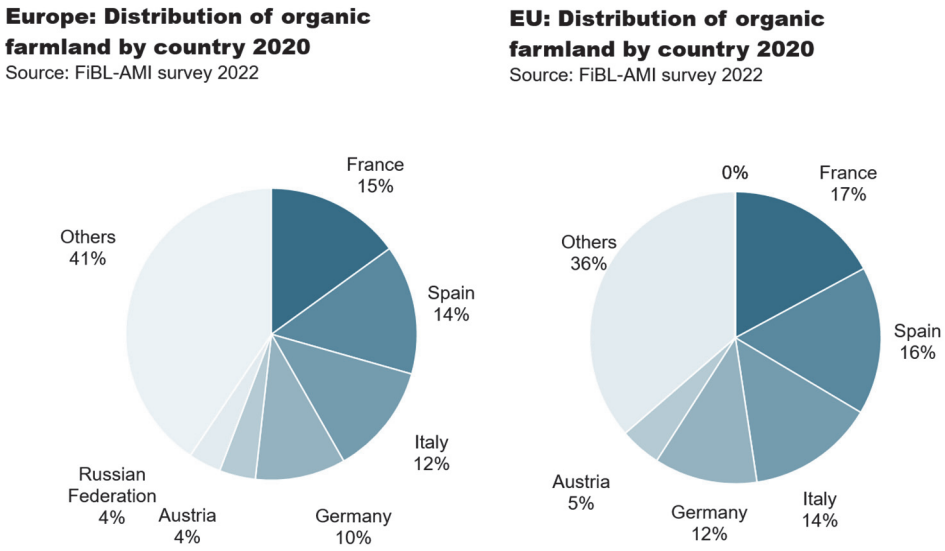


Figure 68: Europe and European Union: Distribution of organic farmland by country 2020

Source: FiBL-AMI survey 2022 based on national data sources and Eurostat
For detailed data sources, see annex

Europe: Organic agricultural land by country 2020

Source: FiBL-AMI survey 2022

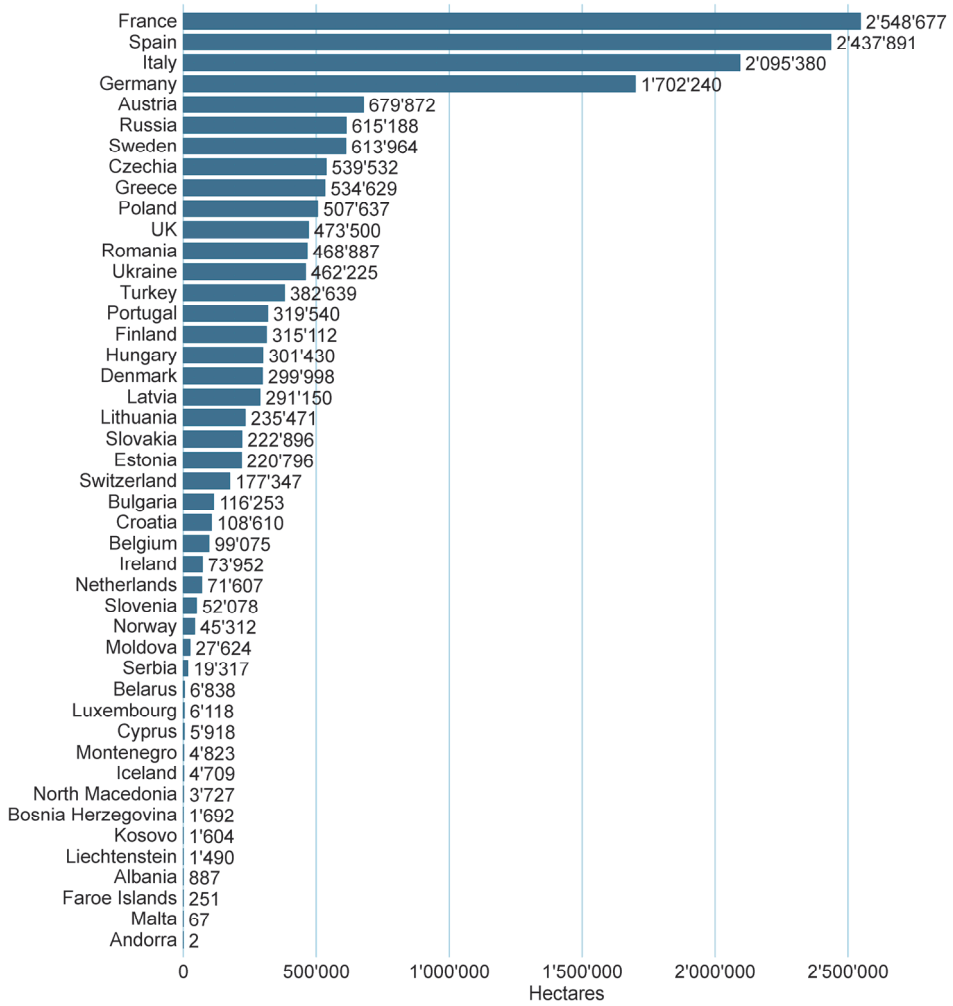


Figure 69: Europe: Organic agricultural land by country 2020

Source: FiBL-AMI survey 2022 based on Eurostat national data sources.
For detailed data sources, see annex.

2.2 Organic shares of total agricultural land

In Europe, 3.4 percent of the agricultural land was organic in 2020, and in the European Union (EU), 9.2 percent (Table 59). In fourteen countries (European Union: twelve), 10 percent or more agricultural land was managed organically (Figure 71). The countries with the highest organic area shares were Liechtenstein (41.6 percent), Austria (26.5 percent), Estonia (22.4 percent) and Sweden (20.4 percent)[1]. Liechtenstein is the country with the highest organic farmland share in the world.

2.3 Growth of organic agricultural land

In 2020, the organic agricultural land in Europe increased by 0.60 million hectares (EU: 0.75 million hectares) or 3.7 percent (EU: 5.3 percent). In Europe, the absolute growth was lower (both in absolute and relative numbers) than in the European Union due to a major decrease of organic farmland reported from Turkey (-135'796 hectares) and the Russian Federation (-26'548 hectares).

The countries that contributed the most to the growth were France, Italy, Germany and Spain, contributing almost 700'000 additional hectares (Figure 73). The highest relative increases were in Belarus (+397.3 percent, partly due to the change of the data source), Kosovo (+54.8 percent) and Albania (+35.8 percent). As mentioned above, some countries showed a decrease in organic land, most notably Turkey (-26.2 percent).

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, Portugal and Switzerland (Table 66).

In Europe, of the 17.1 million hectares of organic agricultural land, at least 11.1 million hectares were fully converted[2] (10.2 million out of 14.9 million hectares in the European Union). At least 2.4 million hectares were under conversion (2.2 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.

By country, the largest in-conversion areas are in Western and Southern European countries, notably France (584'146 hectares), Spain (352'212 hectares), Italy (347'178 hectares) and Romania (192'926 hectares) (Table 66).

[1] No update was available for 2020; the number refers to 2019.
[2] Excluding Austria, Germany, Portugal, the Russian Federation and Switzerland

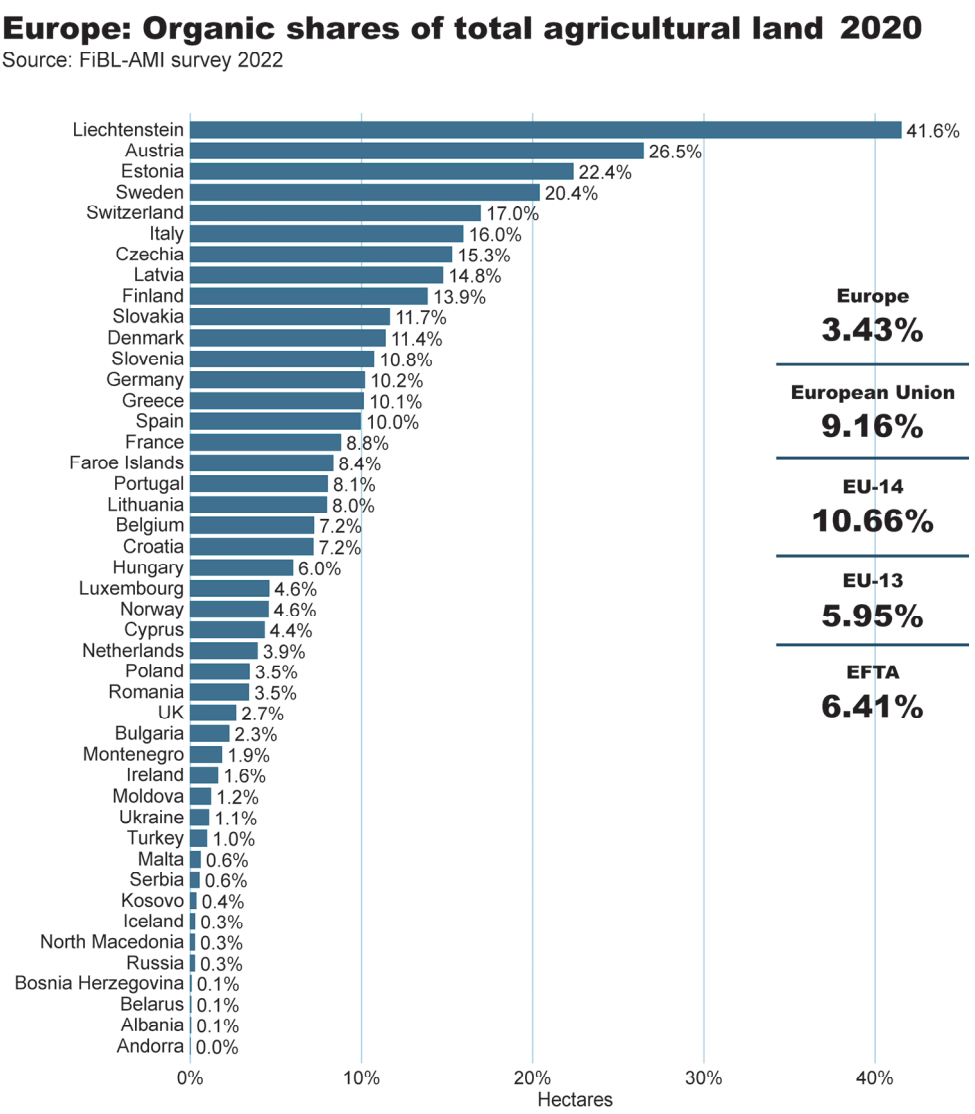


Figure 70: Europe: Organic shares of total agricultural land 2020

Source: FiBL-AMI survey 2022 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-14 = countries, which were member countries of the European Union before May 2004 (excluding the UK).

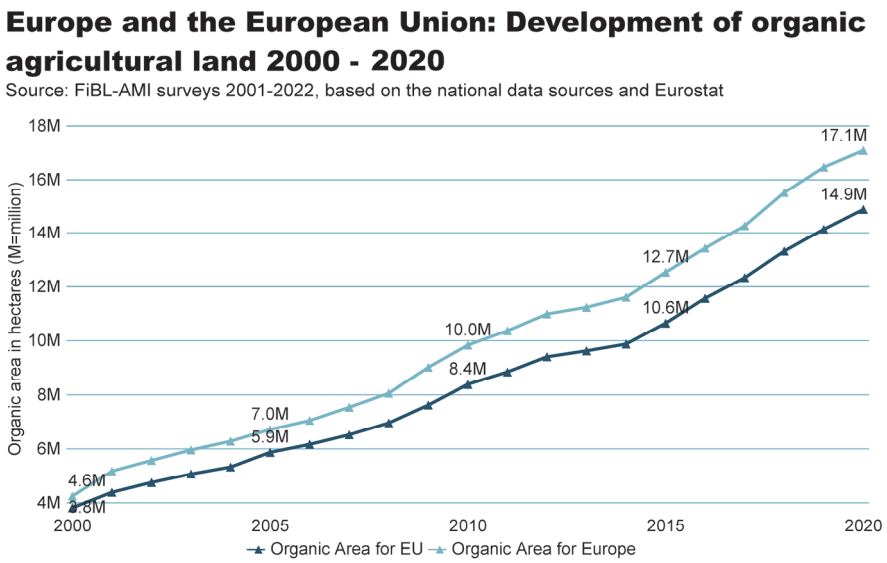


Figure 71: Europe and the European Union: Development of organic agricultural land 2000-2020

Source: FiBL-AMI Surveys 2006-2022 based on national data sources and Eurostat. The data for the European Union covers all countries that were members of the European Union in 2020.

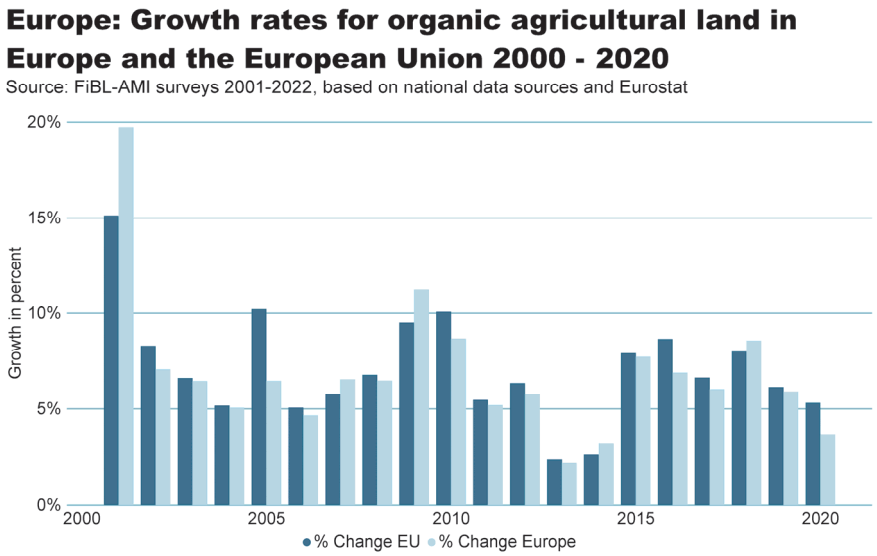


Figure 72: Europe: Growth rates for organic agricultural land in Europe and the European Union 2000-2020

Source: FiBL-AMI Surveys 2002-2022 based on national data sources and Eurostat.

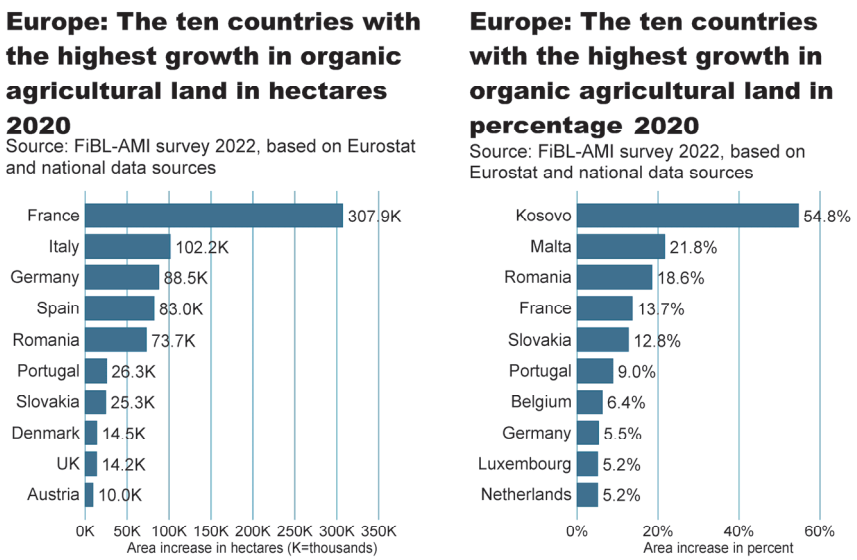


Figure 73: Europe: The ten countries with the highest growth in organic agricultural land in hectares and relative growth in 2020

Source: FiBL-AMI survey 2022 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, where often such data is not available. The area for all land use types[1] has grown steadily since 2004.[2] It should be noted, though, that for several European countries such as Belgium, Italy, Poland, Sweden, 2020 updates on land use and crops were not or only partly available. We assume that for many crops, growth rates were high than what is indicated in the tables below.

Table 60: Europe and the European Union: Land use 2020

Crop group	Europe [Million hectares] (Share of total)	European Union [Million hectares] (Share of total)	Change 2019-2020 Europe/EU [%]	Change 2011-2020 Europe/EU [%]
Arable land	8.1 (3.8%)	6.7 (6.8%)	3.2%/3.9%	76.3%/82.9%
Permanent grassland	6.7 (3.9%)	6.3 (12.4%)	3.1%/3.6%	41.4%/54.7%
Permanent crops	1.9 (10.8%)	1.7 (13.5%)	6.1%/5.7%	79.2%/74.7%
Total	**17.1 (3.4%)**	**14.9 (9.2%)**	**3.7%/5.3%**	**62.1%/68.4%**

Source: FiBL-AMI survey 2022 based on national data sources and Eurostat.
Note: Total includes other agricultural land and correction values for double-cropped areas.

Organic agricultural land by land use

- Table 60 and Figure 74 show that **arable land** constitutes a large part of the organic farmland, with almost 8.1 million hectares in Europe and 6.7 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, oilseeds and dry pulses. The largest cropland area (i.e., arable and permanent crops together) were in France (1.6 million hectares), Italy (1.4 million hectares) and Spain (1.2 million hectares) (Figure 75).
- **Permanent grassland** accounted for 6.7 million hectares in Europe and 6.3 million hectares in the European Union. By country, the largest permanent grassland/grazing area was in Spain with almost 1.3 million hectares, followed by Germany and France (Figure 75).
- **Permanent crops** constituted 10.9 percent of the total permanent cropland in Europe and 13.5 percent in the European Union, with 1.9 and 1.7 million hectares, respectively.

[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.

Europe and European Union: Use of organic agricultural land 2020

Source: FiBL-AMI survey 2022

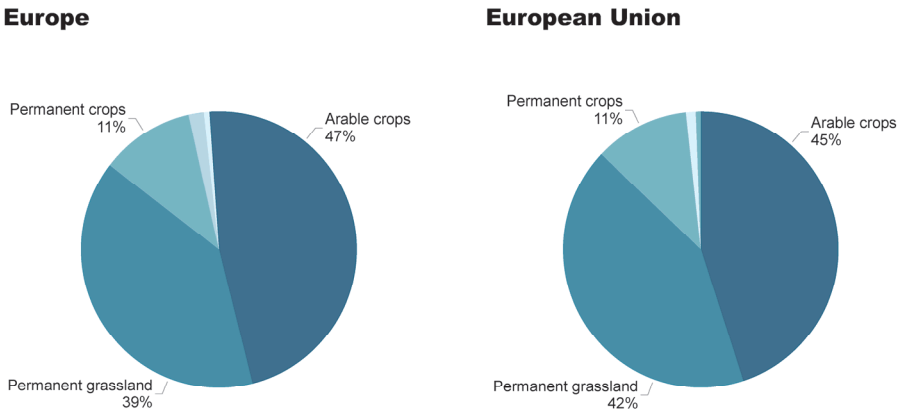


Figure 74: Europe and European Union: Distribution of land use in organic agriculture 2020

Source: FiBL-AMI survey 2022 based on Eurostat and national data sources

Share of total agricultural land:

- Compared to total agriculture (based on FAO and Eurostat land use data and not strictly comparable), organic **arable land** constituted 3.8 percent of the total arable land in Europe and 6.8 percent of that in the EU.
- Whereas the organic share of total **permanent grassland** areas was as high as 12.4 percent in the European Union, it was considerably lower in Europe as a whole (3.9 percent).
- **Permanent crops** had the highest organic area shares: 10.9 percent in Europe and 13.6 percent in the EU.

Increase by land use type

- The largest increase in 2019-2020 was in **permanent crops** (5.7 percent increase in Europe and 6.1 percent increase in the EU), mainly because additional organic permanent crop area was reported for Spain.
- **Permanent grassland** increased by 3.1 percent in Europe and 3.6 percent in the EU (Table 60, Figure 76, Figure 77.).
- The **arable farmland** grew by 3.2 percent in Europe and 3.9 percent in the EU. From 2011 to 2020, **arable land** grew in Europe by 76.3 percent and in the EU by 82.9 percent, thus showing a greater increase than the permanent crops or permanent grassland (Table 60, Figure 76, Figure 77). These numbers show the intensification of organic agriculture as the relevance of grassland is decreasing, whereas arable land is gaining in importance.

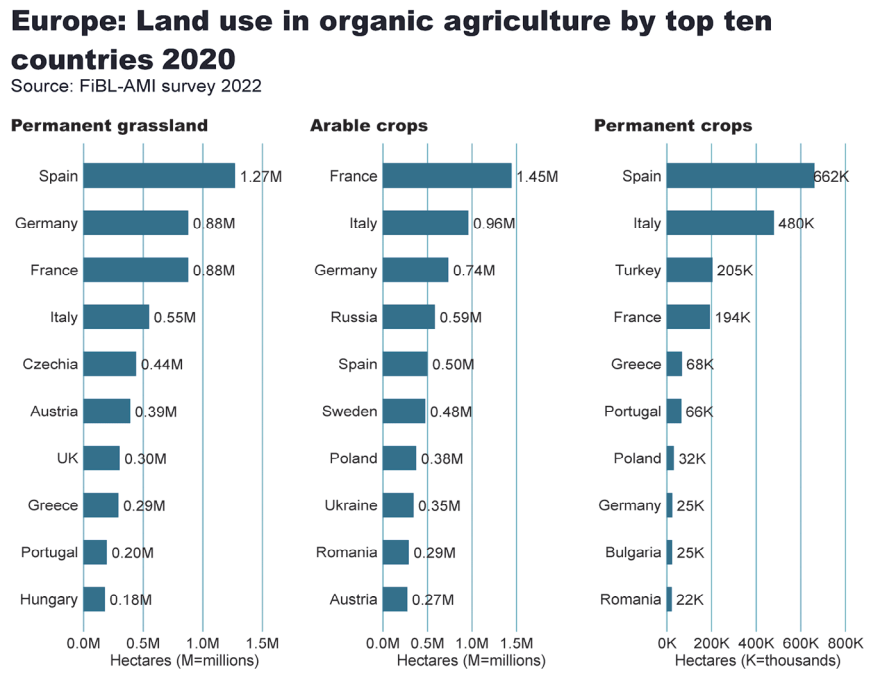


Figure 75: Europe: Land use in organic agriculture - top 10 countries 2020

Source: FiBL-AMI survey 2022 based on Eurostat and national data sources

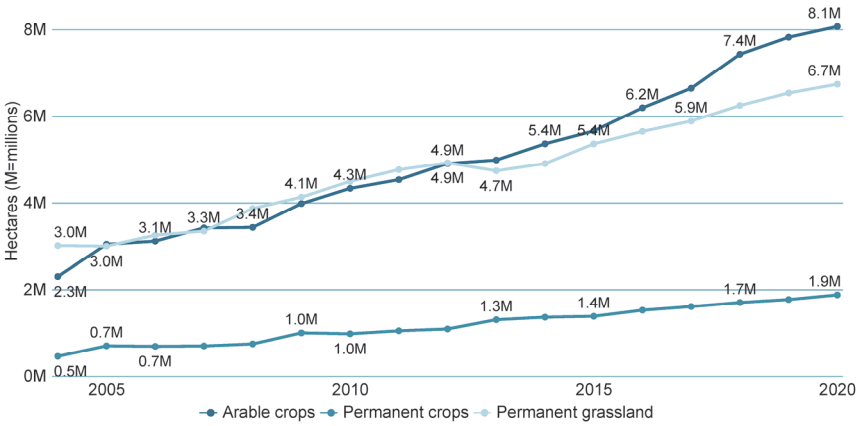


Figure 76: Europe: Growth in organic agricultural land by land use type 2004-2020

Source: FiBL-AMI Surveys 2006-2022 based on national data sources and Eurostat

European Union: Growth in organic agricultural land by land use type 2004 - 2020

Source: FiBL-AMI survey 2022

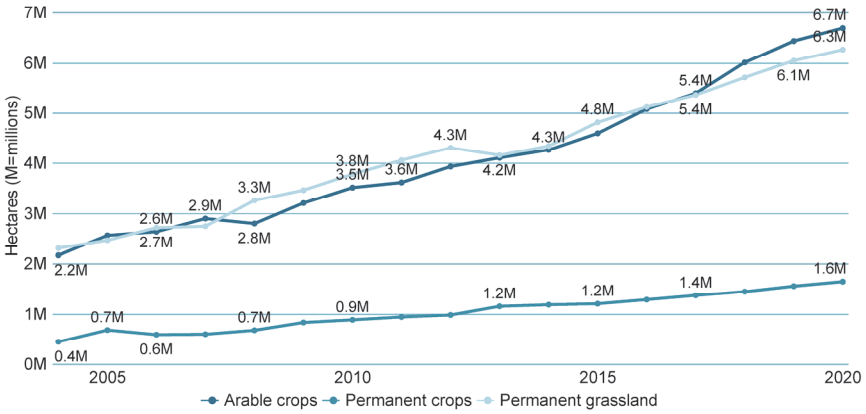


Figure 77: European Union: Growth in organic agricultural land by land use type 2004-2020

Source: FiBL-AMI Surveys 2006-2022 based on national data sources and Eurostat

3.2 Crops grown in organic agriculture

In 2020, 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 2020

	Crop group	Area (ha)		Organic share (%)		Change 2019-2020 (%)		Change 2011-2020 (%)	
		Europe	EU	Europe	EU	Europe	EU	Europe	EU
Arable crops	Cereals	3'027'517	2'440'184	2.4%	4.7%	2.6%	2.6%	63.2%	71.0%
	Dry pulses	572'233	486'964	10.0%	23.4%	4.6%	4.9%	139.6%	126.0%
	Fresh vegetables	212'563	189'721	4.7%	9.5%	5.7%	4.8%	104.1%	135.1%
	Green fodder	2'669'961	2'507'103	11.7%	12.0%	4.0%	3.8%	53.3%	68.6%
	Oilseeds	821'708	408'600	2.3%	3.7%	30.7%	18.4%	331.6%	174.1%
	Root crops	55'761	51'988	0.7%	1.7%	-4.1%	6.1%	26.9%	77.6%
Permanent crops	Berries	48'419	40'652	15.1%	27.1%	6.9%	0.0%	71.3%	56.4%
	Citrus fruit	60'864	60'021	8.7%	11.5%	5.9%	5.8%	159.9%	162.1%
	Fruit, temperate	154'046	121'889	5.7%	10.1%	4.1%	1.5%	27.7%	17.6%
	Fruit, (Sub)tropical	43'468	21'058	18.1%	12.5%	11.8%	12.0%	130.5%	179.8%
	Grapes	431'225	417'982	11.1%	13.2%	8.2%	9.6%	86.4%	92.6%
	Nuts	374'087	323'567	13.7%	23.5%	11.2%	10.9%	102.2%	96.3%
	Olives	621'470	556'629	10.3%	10.9%	-0.4%	2.7%	48.7%	44.2%

Source: FiBL-AMI survey 2022 based on national data sources and Eurostat. Totals for arable and permanent crops in other tables include further crop groups
Note: For crop details by country, please check the crop chapter in this book from page 88 and statistics.fibl.org

Arable crops

A large proportion of the organic arable land (8.1 million hectares in Europe and 6.7 million in the European Union) is used to produce cereals and green fodder, 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-quarter of the total dry pulses area. In organic farming, they are important for crop rotation and animal feeding. In contrast, they are disappearing in conventional farming, as protein crops for animal feed are imported, and synthetic fertilisers are used. Oilseeds and cereals showed by far the highest increase in land area. Both from 2019 to 2020 and the 2011-2020 period, the largest growth was noted for oilseeds, which more than trebled in Europe and almost doubled in Europe. For more information about crop groups by country, see the crop chapters in this book (page 88) and our online database at statistics.fibl.org.

- **Cereals** were the largest crop group in Europe, accounting for 3.0 million hectares or 2.4 percent of the cereal area in Europe. In the European Union, they were the second-largest group, accounting for 2.4 million hectares or 4.7 percent of the total cereal area. Wheat is the most important cereal (1.1 million hectares). The countries with the largest cereal areas were Germany, France, and Italy (including large areas of durum wheat). The highest organic shares of the total cereal area were found in Austria (17.4 percent), Estonia (14.4 percent) and Sweden (12.9 percent). Outside the European Union, the Russian Federation 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 2.5 million hectares (Europe: 2.7 million hectares). Clover, green maize, and grass on arable land were the main crop types.
- In 2020, organic **vegetables**[1] were grown on more than 210'000 hectares in Europe, and almost 190'000 hectares in the European Union, covering 4.7 percent and 9.5 percent of the vegetable area, respectively. The largest areas were in Italy (64'762 hectares), France (36'305 hectares), and Spain (22'023 hectares). High organic shares of all vegetables are found in Denmark (37.5 percent) and Luxembourg (35.5 percent).
- With more than 570'000 hectares in Europe and almost 490'000 hectares in the European Union, organic **dry pulses** accounted for a large share of all dry pulses (10.0 percent in Europe; 23.4 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, Spain and Germany. The highest

[1] It should be noted that for some countries, potatoes are included in the vegetable category.

organic shares were found in Austria (76 percent), Denmark (53 percent) and the Netherlands (48.6 percent).

Permanent crops

A large part of the permanent cropland (1.9 million hectares in Europe and 1.7 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 almost one quarter. Both reached an organic share of more than ten percent of their respective totals. Over the 2011-2020 period, the largest growth was noted for citrus fruit and for tropical and subtropical fruit, which almost trebled in the European Union (Table 61).

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 88) and our online database at statistics.fibl.org.

- Spain, France, and Italy had an organic **grape** area of more than 100'000 hectares each. 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, 15.5 percent of the grape area was organic, in France 18.0 percent, and in Spain 14.9 percent. In the European Union, almost 10 percent of the grape area was organic.
- For **olives**, Italy and Spain had the lead (more than 200'000 hectares each). France (36.5 percent) and Italy (21.2 percent) had the highest organic shares. The largest growth occurred in Spain, where the organic olive area increased by more than 10'000 hectares.
- **Temperate fruits** were grown on more than 150'000 hectares (European Union: more than 120'000 hectares), and they covered 5.7 percent of the total temperate fruit area (10.0 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 (70'732 hectares), cherries (18'731 hectares), plums (18'002 hectares) and apricots (15'504 hectares). The largest temperate fruit producers were Turkey, Italy and France, with more than 20'000 hectares each.

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 10.0 million hectares (European Union: 6.0 million hectares). The largest wild collection area in Europe (and in the world) was in Finland with 5.5 million hectares (mainly berries). For country details on wild collection areas, see Table 68.

4 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 Table 62, a ten-year development is not shown for the number of exporters. In 2020, the increase in the number of operators was lower than in 2019.

Table 62: Europe: Organic operators by country group 2020

	Europe			European Union		
	No.	Growth 1 year	Growth 10 years	No.	Growth 1 year	Growth 10 years
Producers	417'977	-2.5%	44.3%	349'499	3.3%	51.1%
Processors	84'799	3.8%	105.0%	78'262	3.4%	104.0%
Importers	6'792	5.2%	116.9%	5'820	5.3%	100.1%
Exporters	4'320	22.6%	N/A%	3'589	14.7%	N/A

Source: FiBL-AMI survey 2022 based on national data sources and Eurostat. For a breakdown by country, see Table 69. For detailed data sources, see annex.

4.1 Organic producers

In 2020, there almost 420'000 organic producers in Europe and almost 350'000 in the European Union (Table 62 and Table 69). In the European Union, the country with the largest number of producers was Italy (more than 70'000); outside the EU, it was Turkey (more than 50'500) (Figure 80). Growth in the European Union (+3.3 percent) was stronger than in Europe as a whole (-2.5 percent), where the number of farms decreased mainly due to almost 20'000 farmers less reported from Turkey. Over the decade 2011-2020, the number of producers in Europe increased by 44 percent (EU: +51 percent). Almost one-sixth of the world's organic farmers are in Europe (Figure 78).

4.2 Organic processors and importers

There were almost 85'000 organic processors in Europe (+3.8 percent compared to 2019) and more than 78'000 in the European Union (+3.4 percent). The country with the largest number of processors was Italy (22'689). Almost 6'800 importers (+5.2 percent growth) were counted in Europe and more than 5'800 in the European Union (+5.3 percent). Germany was the country with the most importers (1'916) (Table 62, Table 69, Figure 79).

Europe and the European Union: Development of the number of organic producers 2000 - 2020

Source: FiBL survey 2022

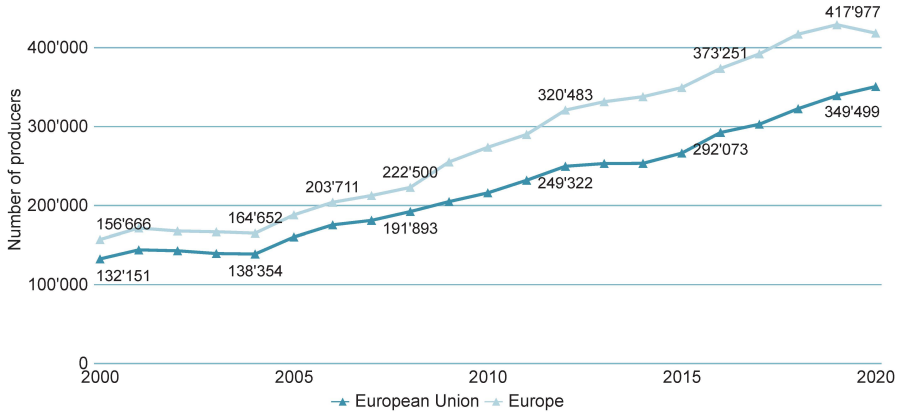
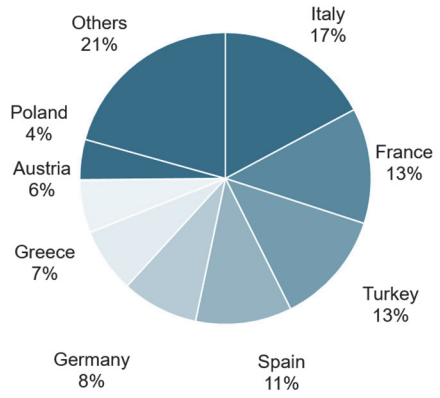


Figure 78: Europe and the European Union: Development of the number of organic producers 2000-2020

Source: FiBL-AMI surveys 2002-2022 based on national data sources and Eurostat

Europe: Distribution of organic producers 2020

Source: FiBL-AMI survey 2022



Europe: Distribution of organic processors 2020

Source: FiBL-AMI survey 2022

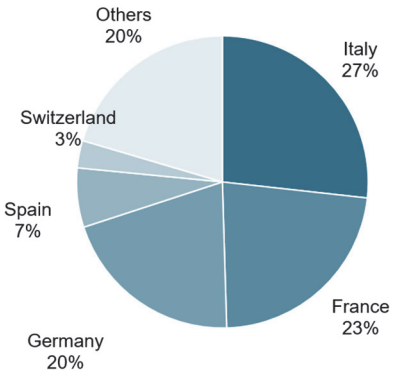


Figure 79: Europe: Distribution of organic producers and processors by country 2020

Source: FiBL-AMI survey 2022, based on national data sources and Eurostat.

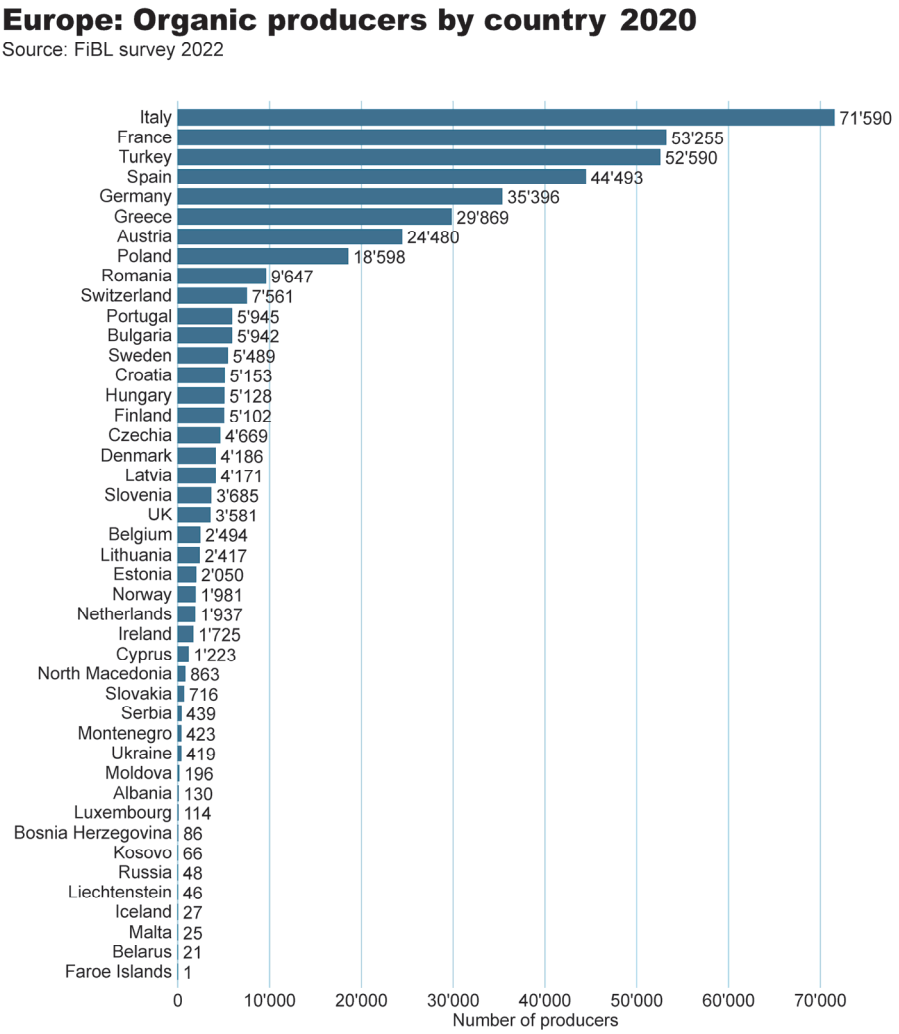


Figure 80: Europe: Number of organic producers by country 2020

Source: FiBL-AMI survey 2022 based on national data sources and Eurostat. For detailed data sources, see annex.

5 Organic retail sales

In 2020, the organic market in Europe grew to 52.0 billion euros (European Union: 44.8 billion euros) and considerably faster than in the previous year. Unfortunately, not all countries provide data on their domestic markets on a regular basis (Table 70), and it may be assumed that the market is larger than indicated by the figures in Table 63 and Table 70.

Table 63: Europe and the European Union: Organic retail sales 2020: Key data

	Retail sales [Million €]	Per capita consumption [€]	Growth 2019-2020 [%]	Growth 2011-2020 [%]
Europe	52'000.2	63.3	14.9%	144.2%
European Union	44'829.8	101.8	15.1%	152.1%

Source: FiBL-AMI survey 2022 based on national data sources. For country details, see annex.
Please note that the EU number is not comparably to what was communicated in previous years as only the countries that were a member of the EU in 2020 were included.

5.1 Size of the organic market

Germany continued to be the largest market in Europe (15 billion euros) (Figure 82), and, after the United States, it is the second biggest organic market in the world. France holds second place in Europe with 12.7 billion euros Figure 82).

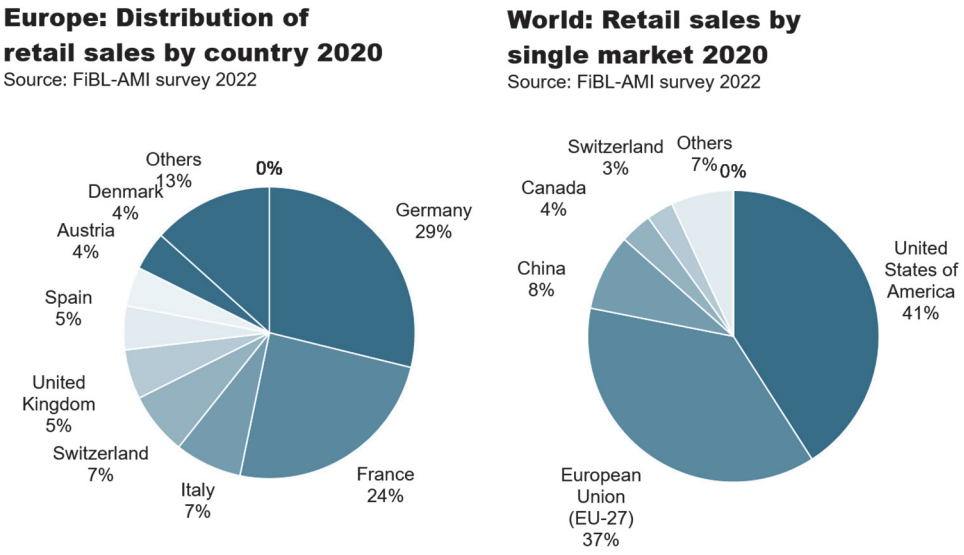


Figure 81: Europe: Distribution of retail sales by country and by single market worldwide 2020

Source: FiBL-AMI survey 2022 based on national data sources

Comparing organic markets by single markets, the United States had the lead. 40.9 percent of global retail sales of organic products are in the United States (49.5 billion euros), followed by the European Union (44.8 billion euros; 37.1 percent of organic global retail sales, Figure 81). Comparing retail sales by continent, North America, with 44.5 percent of the world's organic retail sales, was the largest market (53.7 billion euros).

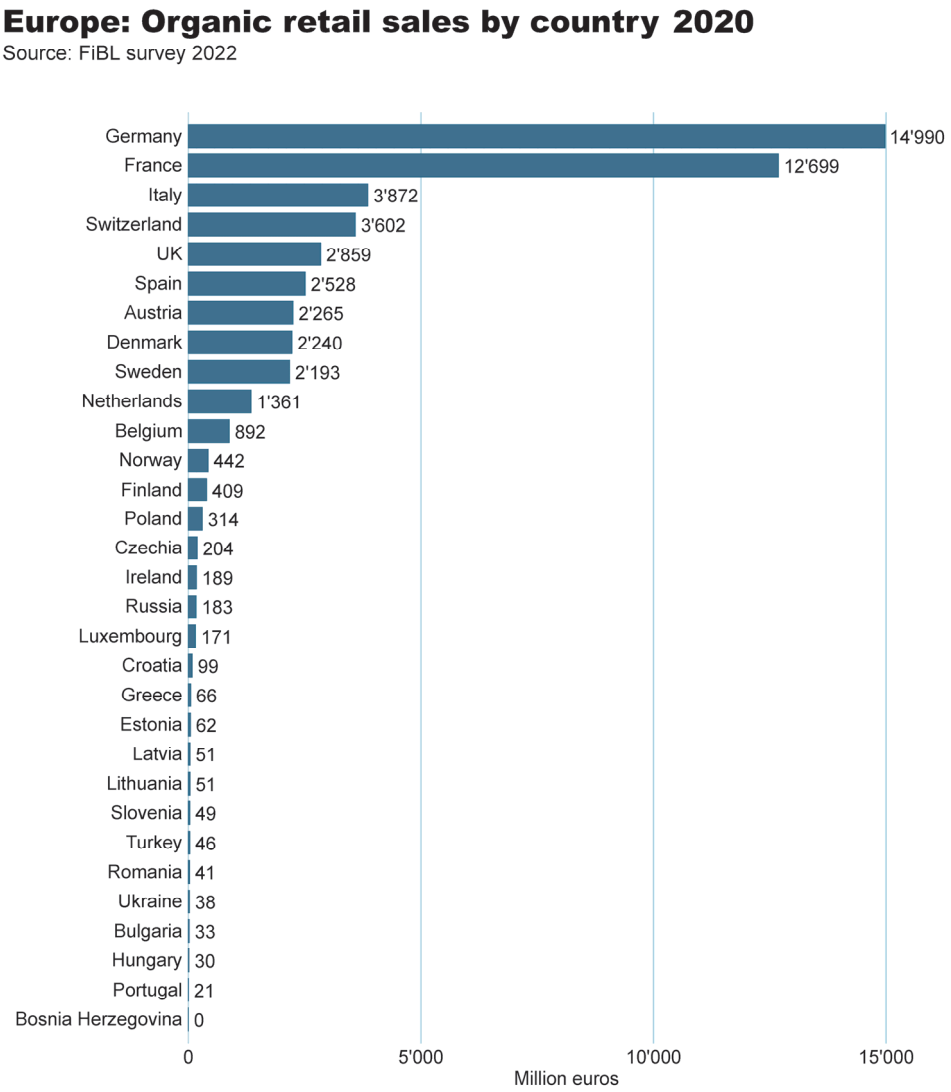


Figure 82: Europe: Retail sales by country 2020

Source: FiBL-AMI survey 2022 based on national data sources. Please note that 2020 data were not available for all countries. For detailed data sources, see annex.

5.2 Growth of the organic market

The organic market grew in Europe and the EU by approximately 15 percent, the highest growth rate achieved in the current decade. From 2011 to 2020, the organic market more than doubled in size (Figure 83).

All countries for which new data were available showed growth, many in the double-digits (Figure 84). With 22.3 percent, Germany showed the highest increase, followed by Switzerland and Austria (Figure 84, Table 70).

The United Kingdom, which left the European Union in January 2020, also showed double-digit growth (12.6 percent increase in 2020).

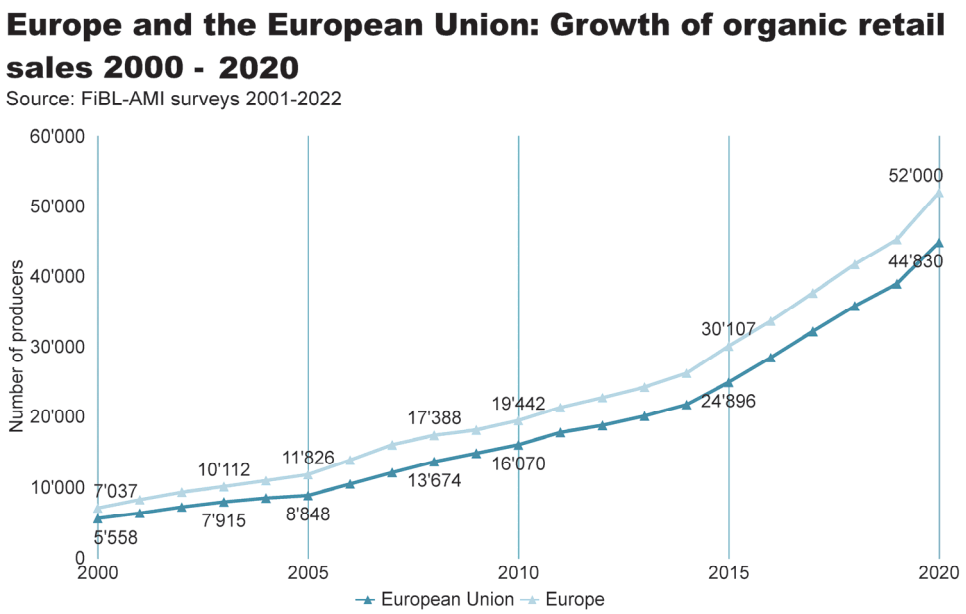


Figure 83: Growth of organic retail sales in Europe and the European Union, 2000-2020

Source: FiBL-AMI surveys 2004-2022, and OrganicDataNetwork Surveys 2013-2015

Europe: The countries with the highest organic market growth 2020

Source: FiBL-AMI survey 2022

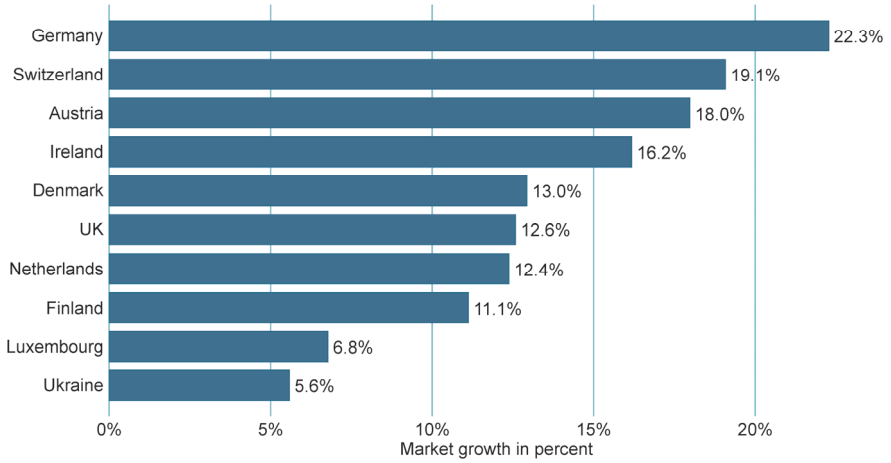


Figure 84: Europe: The countries with the highest organic market growth 2020

Source: FiBL-AMI surveys 2022. For detailed data sources, see annex.

5.3 Per capita consumption of organic food

Like in the previous years, the highest per capita consumption of organic food was in Switzerland (418 euros) and Denmark (384 euros). Switzerland is now the number one in the world in terms of per capita consumption, partly due to the fact that the Swiss Franc increased in value. Seven countries had a per capita consumption of more than 100 euros in 2020 (Figure 85, Table 70).

The continual growth in consumer interest is well documented by the development of per capita consumption, with a specific notable increase in 2020 (Figure 86). The per capita consumption in Europe rose to 63.3 euros and to 101.8 euros in the European Union.

In Central Eastern European countries, consumer spending is still low (Table 70). 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 the area and operator data is good, the Czech Republic and Estonia are the only countries with a permanent collection system for retail sales data.

[1] Estonia, Latvia and Lithuania.

Europe: The countries with the highest per capita consumption 2020

Source: FiBL-AMI survey 2022

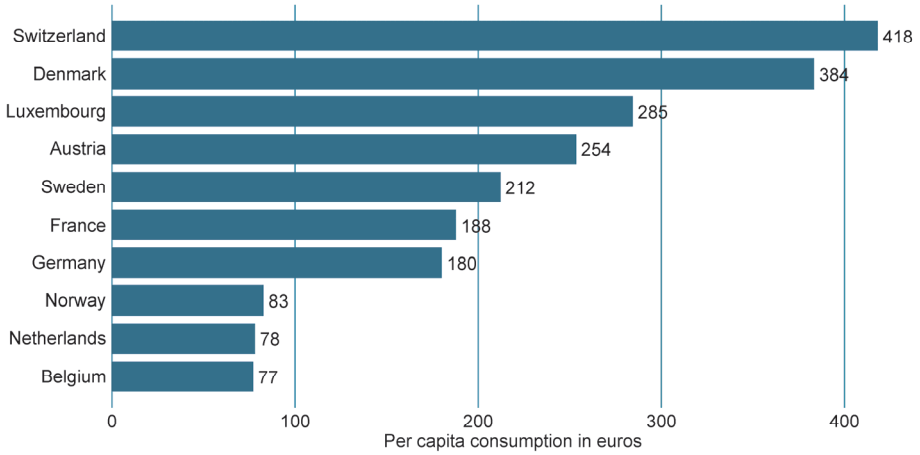


Figure 85: Europe: The countries with the highest per capita consumption 2020

Source: FiBL-AMI survey 2022 based on national data sources. For detailed data sources, see annex.

Europe and European Union: Growth of the per capita consumption 2009-2020

Source: FiBL-AMI surveys 2006-2022, OrganicDataNetwork Surveys 2013-2015

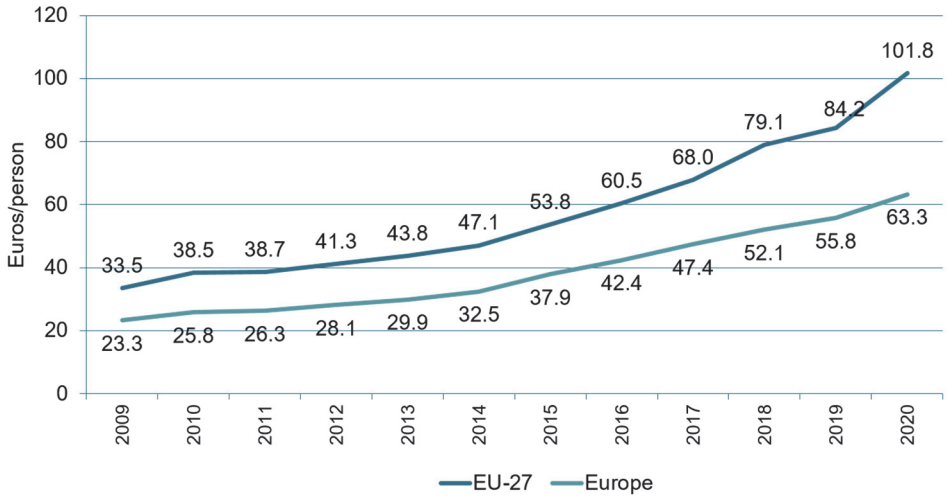


Figure 86: Europe: Growth of the per capita consumption 2010-2020

Source: FiBL-AMI survey 2022 based on national data sources. Calculation based on Eurostat population data. For detailed data sources, see annex.

5.4 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 (13 percent, highest organic market share in the world), Austria (11.3 percent) and Switzerland (10.8 percent) (Figure 87, Table 70).

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. The pandemic interrupted that development and made general food markets grow rapidly as long as out of home consumption was locked down. Market shares of individual products and product groups can be far higher; these data are provided in Table 64.

Europe: The countries with the highest shares of the total retail sales 2019 and 2020

Source: FiBL-AMI survey 2022

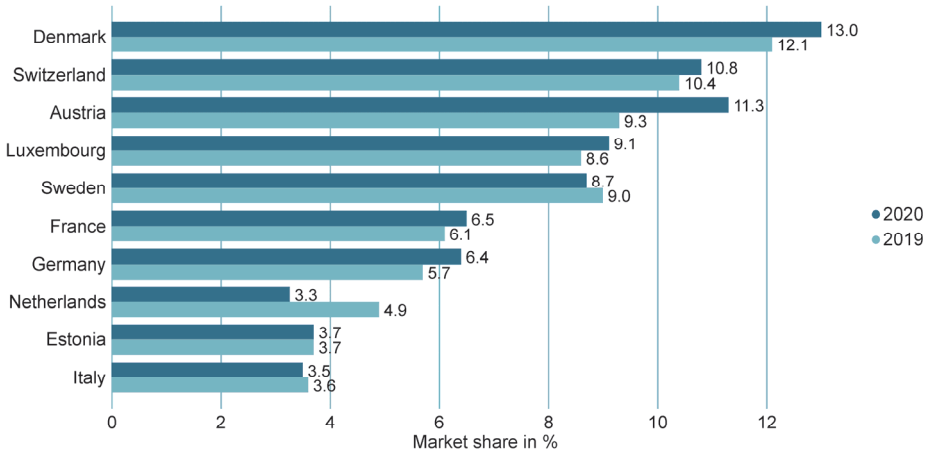


Figure 87: Europe: The countries with the highest shares of the total retail sales 2019 and 2020

Source: FiBL-AMI survey 2022 based on national data sources. For detailed data sources, see annex.

5.5 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 64 shows that, in Denmark and France, eggs reach organic market shares of more than 30 percent (in value).

Table 64: Organic shares for retail sales values (euros) for selected products 2020

	Austria	Belgium	Czech Republic (2019)	Denmark	Finland	France (2019)	Germany	Italy (2019)	Netherlands	Norway (2018)	Spain (2017)	Sweden (2017)	Switzerland	UK
Baby food					22.0	26.9		4.8		33.1				59.6
Beverages			0.4	14.8 (juice)		5.5		3.0		0.5		5.6	4.3	
Bread & bakery products		3.9 (bread)	0.9			5.3	8.5 (bread)	4.0	0.9	2.1		3.5	26.2 (bread only)	0.3
Eggs	22.8	17.5		31.2	21.0	37.2	25.4	19.8	17.0	9.5	2.9		28.9	8.8
Fish and fish products						3.1			1.4	1.5	0.6	12.9		1.1
Fresh vegetables	17.6	8.4				7.6	13.8	4.7		4.2	3.3	12.2	26.9	4.8
Fruit	11.7	6.3				8.8	9.9	6.6		2.2	1.7	18.4	18.4	3.0
Vegetables and fruit			1.7		7.0	8.2		7.7	4..5				21.2	0.5
Meat and meat products	4.2 (meat)		0.4	9.4 (beef)		3.2	5.8 (meat)	2.9	3.3	0.5	1.2	2.9	6.2 (including fish)	1.6
Milk and dairy products	13.1	4.2	1.7			5.8	12.3	3.6	4.0	2.1	1.1	10.4	11.3	3.5
- Butter	11.8			17.8		7.4	6.9	2.8		3.1				
- Cheese	11.0			8.5	2.0	2.6	6.0	1.0		0.7			7.9	1.1
- Milk	21.9	4.8		34.3	4.5	15.7	16.4	8.1		4.4			26.0	5.1
- Yoghurt	25.3					9.1	10.7	6.1		0.7				8.2

Sources: FiBL-AMI survey 2022, based on data from Austria: RollAMA based on GfK, Belgium: Biowallonie; 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 Marche 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, Sweden, and Germany. 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 more than 30 percent. Individual products can reach even higher market shares. Organic bananas (66 percent in Denmark) or organic milk substitutes (62 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.

5.6 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 70).

Figure 88 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 89.

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 24.6 percent in 2020. Supermarket chains have founded partnerships with organic associations and sell products with their brands.

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.

Europe: Marketing channels for organic products in selected countries 2020

Source: FiBL-AMI survey 2022

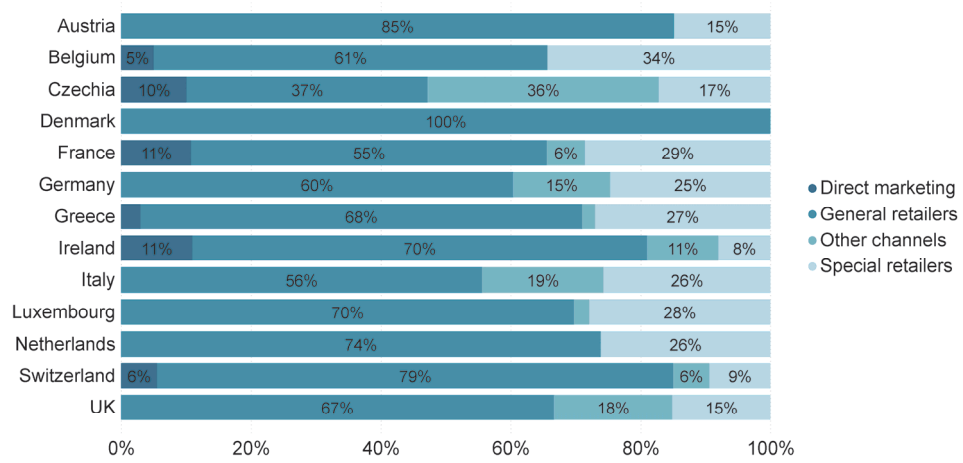


Figure 88: Europe: Marketing channels for organic products in selected countries 2020

Source: FiBL-AMI survey 2022 based on national data sources.
For detailed data sources, see annex.

Europe: Growth of marketing channels for organic products 2018 - 2020 in selected countries

Source: Austria: AMA Marketing, Denmark: Organic Denmark/LV, France: Agence Bio, Germany: Arbeitskreis Biomarkt, Italy: AssoBio/Nomisma, Switzerland: Bio Suisse.

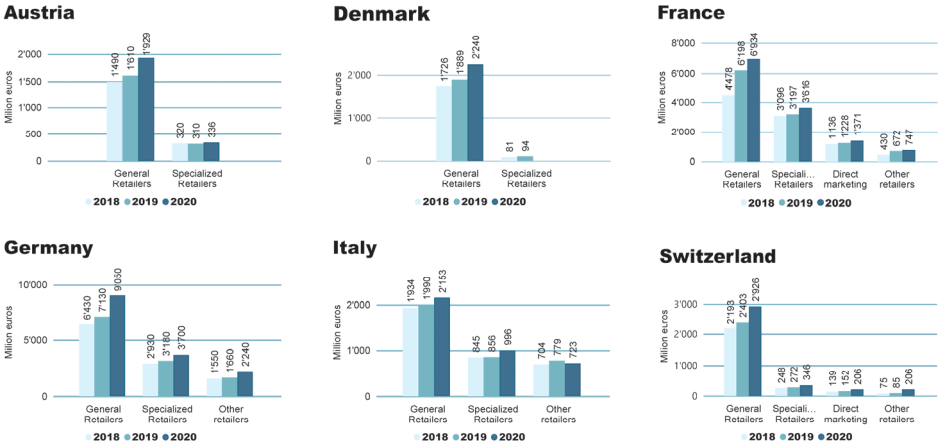


Figure 89: Europe: Growth of marketing channels for organic products 2018-2020 in selected countries

Sources: Austria: AMA Marketing, Denmark: Organic Denmark/LV, France: Agence Bio, Germany: Arbeitskreis Biomarkt, Italy: AssoBio/Nomisma, Switzerland: Bio Suisse.

5.7 Organic imports

The European Union, which is the second-biggest organic market, provided data on its organic imports, showing, for the third time, the key import products and key importing countries (based on volume in metric tons MT).

- In 2020, the EU imported a total of 2.8 million MT of organic agri-food products.
- The biggest importers (based on import volume in metric tons) were the Netherlands, followed by Germany and Belgium. For the Dutch import should be noted that a large part of the goods is resold to other EU countries. For a full list, see Table 71.
- Compared to 2019, organic imports declined by 1.9 percent (Figure 90).
- 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 was the biggest supplier of organic agri-food products to the EU, with 433'705 tonnes; this corresponds to 13.4 percent of the total organic import volume.

For more information, see the contribution about EU organic imports on page 146.

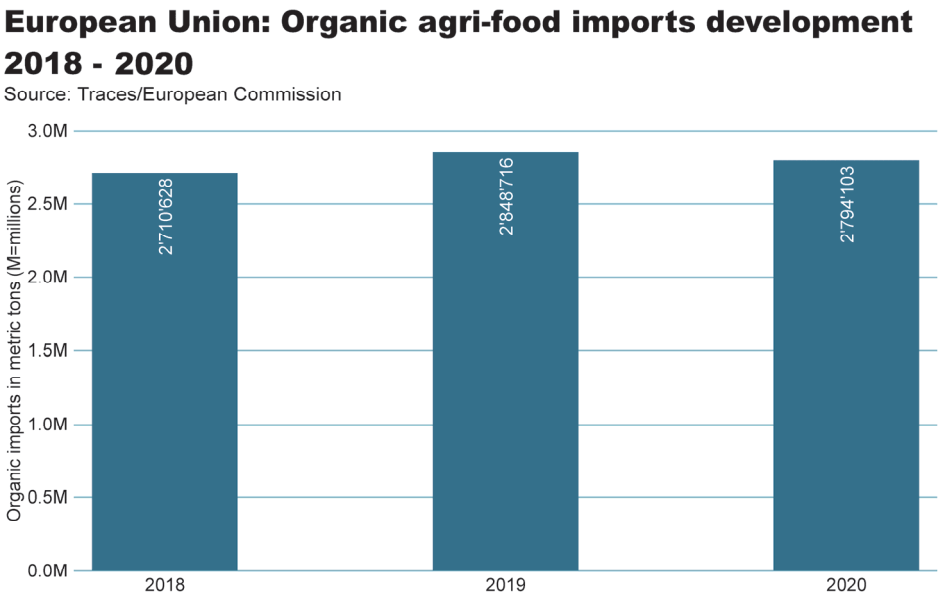


Figure 90: EU organic imports: Growth 2018 to 2020 (EU27)

Source Traces

5.8 Impact of COVID-19 on the organic market

The COVID-19 pandemic has tremendously impacted most people's purchasing behaviour and has given the organic market an unprecedented upturn in many countries. People have been staying at home to eat, and out-of-home meals have been reduced to a minimum. On the other hand, in general, food sales in supermarkets have

increased rapidly. Organic food sales have accelerated even faster. When consumers have the choice, which they don't have in canteens and restaurants, they more often buy organic products; for example, in 2020, the growth of the organic market in Germany was twice as strong as the general food market. Health, environment and climate change have become big issues among the population – even more so in the pandemic. Consuming organic food allows people to afford something good when travelling, going out to restaurants and theatre visits are not possible and supermarkets, natural food stores and direct marketers fulfil consumers' desire for healthier, more regional and organic products.

Many shops have become innovative in selling food, adapting to consumer preferences for not leaving home or going too far for shopping. Online sale options, like subscription boxes for organic food, have grown tremendously along with 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 but slower growth rates. People's awareness of organic, environmental and health issues will remain. Decreasing incomes and increasing prices for many other consumer goods like energy in some population groups may reduce organic retail sales.

On the agricultural side, with the growing market, organic production and processing need to grow at the same level as the market. Up to now, small- and medium-sized enterprises have dominated organic processing. They will need to grow, or new enterprises must enter the market. Intensive crop and animal production and these products' processing are needed. The European Union's Farm to Fork strategy can support this development with several measures.

Conclusion

Available organic farming data in the global and European markets shows that, in an international context, the European organic sector is well-developed. Relatively high shares of agricultural land, continual growth in the area, number of operators and a fast-growing market show the exceptional dynamics of the European organic market and sector.

In past years, the organic market in many countries was growing faster than production; driven by the pandemic, it has grown faster than before. As shown by the import statistics, domestic supply, including products that can be grown in Europe, still cannot meet demand. However, organic farmland growth did not keep pace. Therefore, many organic organisations or market actors are calling for more farmers to convert to organic. More processing, storing and distribution facilities are also 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 comes 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 third time (European Commission 2021). 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.

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.

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.

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 27 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-14 countries, who were member countries of the European Union before the accession of ten candidate countries on May 1, 2004. The United Kingdom, which left the European Union in 2020, is not included in the 2020 European Union level 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, Ukraine and the United Kingdom.

[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.

Organic Agriculture in Europe: Tables

Table 65: Europe: Organic agricultural land by country 2020

Country	Organic agr. land [ha]	Organic share [%]	Change 2019-2020 [%]	Change 2011-2020 [%]	Change 2019-2020 [ha]
Albania	887	0.1%	35.8%	97.9%	234
Andorra	2	0.0%	0.0%	-50.0%	0
Austria	679'872	26.5%	1.5%	20.9%	9'951
Belarus	6'838	0.1%	397.3%		5'463
Belgium	99'075	7.2%	6.4%	79.1%	5'956
Bosnia & Herzegovina	1'692	0.1%	0.0%	393.5%	0
Bulgaria	116'253	2.3%	-1.3%	364.6%	-1'526
Channel Islands	180	2.0%	0.0%	-28.0%	0
Croatia	108'610	7.2%	0.4%	239.0%	483
Cyprus	5'918	4.4%	-5.2%	65.5%	-322
Czech Republic	539'532	15.3%	-0.3%	17.2%	-1'454
Denmark	299'998	11.4%	5.1%	85.0%	14'472
Estonia	220'796	22.4%	0.0%	65.0%	59
Faroe Islands	251	8.4%	0.0%	-0.8%	0
Finland	315'112	13.9%	2.8%	67.4%	8'628
France	2'548'677	8.8%	13.7%	161.4%	307'880
Germany	1'702'240	10.2%	5.5%	67.6%	88'455
Greece	534'629	10.1%	1.1%	150.7%	5'877
Greenland		0.0%	N/A	N/A	0
Hungary	301'430	6.0%	-0.6%	142.3%	-1'760
Iceland	4'709	0.3%	-18.0%	-42.9%	-1'031
Ireland	73'952	1.6%	0.0%	36.6%	0
Italy	2'095'380	16.0%	5.1%	91.0%	102'155
Kosovo	1'604	0.4%	54.8%	14350.5%	568
Latvia	291'150	14.8%	0.5%	58.2%	1'354
Liechtenstein	1'490	41.6%	1.4%	36.1%	20
Lithuania	235'471	8.0%	-2.7%	54.6%	-6'647
Luxembourg	6'118	4.6%	5.2%	64.5%	304
Malta	67	0.6%	21.8%	193.6%	12
Moldova	27'624	1.2%	3.5%	25.0%	921
Montenegro	4'823	1.9%	1.5%	57.2%	71
Netherlands	71'607	3.9%	5.2%	51.7%	3'539
North Macedonia	3'727	0.3%	0.4%	-85.9%	16
Norway	45'312	4.6%	0.0%	-18.4%	0
Poland	507'637	3.5%	0.0%	-16.7%	0
Portugal	319'540	8.1%	9.0%	59.6%	26'327
Romania	468'887	3.5%	18.6%	103.9%	73'659
Russia	615'188	0.3%	-4.1%	385.0%	-26'548
Serbia	19'317	0.6%	-9.2%	209.7%	-1'949
Slovakia	222'896	11.7%	12.8%	33.7%	25'331
Slovenia	52'078	10.8%	4.9%	62.0%	2'440
Spain	2'437'891	10.0%	3.5%	50.3%	82'975
Sweden	613'964	20.4%	0.0%	27.9%	0
Switzerland	177'347	17.0%	2.7%	52.6%	4'633
Turkey	382'639	1.0%	-26.2%	-13.5%	-135'796
Ukraine	462'225	1.1%	-1.2%	71.0%	-5'755
United Kingdom	473'500	2.7%	3.1%	-25.8%	14'225
Total Europe	**17'098'134**	**3.4%**	**3.7%**	**62.1%**	**603'222**
Total EU	**14'868'780**	**9.2%**	**5.3%**	**68.3%**	**748'149**

Source: *FiBL-AMI survey 2022 based on Eurostat and national data sources. For data sources, see annex.*

Table 66: Europe: Conversion status of organic agricultural land 2020

County	Organic area [ha]	Area fully converted [ha]	Area under conversion [ha]
Albania	887	767	121
Andorra	2	2	
Austria	679'872		
Belarus	6'838	967	5'871
Belgium	99'075	78'323	14'796
Bosnia and Herzegovina	1'692	1'279	413
Bulgaria	116'252	96'481	19'779
Channel Islands	180	180	
Croatia	108'610	79'186	29'429
Cyprus	5'918	5'290	627
Czech Republic	539'532	501'892	37'640
Denmark	299'998	243'674	56'328
Estonia	220'796	201'557	19'236
Faroe Islands	251	251	
Finland	315'112	282'781	32'331
France	2'548'677	1'964'726	584'146
Germany	1'702'240		
Greece	534'629	451'079	83'554
Hungary	301'430	193'217	108'216
Iceland	4'709	4'150	559
Ireland	73'952	66'913	6'796
Portugal	319'540	269'369	50'188
Romania	468'887	275'966	192'926
Russian Federation	615'187		
Serbia	19'317	9'614	9'699
Slovakia	222'896	181'740	41'153
Slovenia	52'078	45'788	6'292
Spain	2'437'891	2'085'711	352'212
Sweden	613'964	555'788	58'176
Switzerland	177'347		
Turkey	382'639	267'823	114'847
Ukraine	462'225	410'583	51'642
United Kingdom	473'500	442'600	30'300
Total Europe	**17'098'134**	**11'484'443**	**2'432'533**
Total European Union	**14'868'780**	**10'275'625**	**2'205'101**

Source: *FiBL-AMI survey 2022 based on Eurostat and national data sources. For data sources, see annex.*

Table 67: Europe: Land use in organic agriculture by country 2020

Country	Arable land [ha]	Permanent crops [ha]	Permanent grassland [ha]	Total [ha]
Albania	759	128		887
Andorra		2		2
Austria	274'761	12'298	392'734	679'872
Belarus	1'298	66		6'838
Belgium	31'789	1'418	58'123	99'075
Bosnia and Herzegovina	1'532	159		1'692
Bulgaria	61'249	24'849	30'154	116'252
Channel Islands				180
Croatia	50'203	16'077	42'332	108'610
Cyprus	2'916	2'816	186	5'918
Czech Republic	91'436	5'696	442'399	539'532
Denmark	248'473	3'576	47'949	299'998
Estonia	124'378	2'522	93'896	220'796
Faroe Islands	1		250	251
Finland	266'668	625		315'112
France	1'445'221	193'731	879'244	2'548'677
Germany	735'727	25'132	880'000	1'702'240
Greece	172'441	68'176	294'012	534'629
Hungary	105'562	14'907	180'961	301'430
Iceland	543	1	2'356	4'709
Ireland	4'319	64	69'323	73'952
Italy	961'692	480'459	551'074	2'095'380
Kosovo	1'593	11		1'604
Latvia	155'204	3'311	132'635	291'150
Liechtenstein	228	7	1'144	1'490
Lithuania	142'344	4'753	82'143	235'463
Luxembourg	2'858	130	3'130	6'118
Malta	41	26		67
Moldova	23'223	4'305		27'624
Montenegro	307	564	3'952	4'823
Netherlands	29'165	901	41'541	71'607
North Macedonia	2'955	772		3'727
Norway	36'504	335	8'473	45'312
Poland	375'740	31'924	99'973	507'637
Portugal	57'381	65'657	196'502	319'540
Romania	291'628	22'221	155'038	468'887
Russian Federation	585'268		2'489	615'187
Serbia	10'200	5'600	3'517	19'317
Slovakia	75'589	2'095	145'209	222'896
Slovenia	6'893	3'280	41'903	52'078
Spain	502'074	662'425	1'273'392	2'437'891
Sweden	476'981	610	136'372	613'964
Switzerland	42'951	3'107	128'550	177'347
Turkey	165'058	205'036	12'545	382'639
Ukraine	345'375	3'855	1'375	462'225
United Kingdom	159'000	2'000	304'500	473'500
Total Europe	**8'069'529**	**1'875'629**	**6'739'377**	**17'098'134**
Total European Union	**6'692'733**	**1'649'681**	**6'270'225**	**14'868'780**

Source: FiBL-AMI survey 2022 based on Eurostat and national data sources. For data sources, see annex. The total includes other agricultural areas for which no land use details were available.

Table 68: Europe: Organic agricultural land and wild collection areas by country 2020

Country	Agricultural land [ha]	Wild collection [ha]	Total [ha]
Albania	887	722'984	723'871
Andorra	2		2
Austria	679'872		679'872
Belarus	6'838		6'838
Belgium	99'075		99'075
Bosnia and Herzegovina	1'692	11'579	13'271
Bulgaria	116'252		116'252
Channel Islands	180		180
Croatia	108'610		108'610
Cyprus	5'918		5'918
Czech Republic	539'532		539'532
Denmark	299'998		299'998
Estonia	220'796	447'271	668'067
Faroe Islands	251	0	251
Finland	315'112	5'513'475	5'828'587
France	2'548'677		2'548'677
Germany	1'702'240		1'702'240
Greece	534'629		534'629
Greenland			
Hungary	301'430		301'430
Iceland	4'709	216'727	221'437
Ireland	73'952		73'952
Isle of Man			
Italy	2'095'380		2'095'380
Kosovo	1'604	1'596'843	1'598'447
Latvia	291'150		291'150
Liechtenstein	1'490		1'490
Lithuania	235'463		235'463
Luxembourg	6'118		6'118
Malta	67		67
Moldova	27'624	1'729	29'352
Montenegro	4'823		4'823
Netherlands	71'607		71'607
North Macedonia	3'727	556'600	560'327
Norway	45'312		45'312
Poland	507'637		507'637
Portugal	319'540		319'540
Romania	468'887		468'887
Russian Federation	615'187	221'039	836'226
Serbia	19'317		19'317
Slovakia	222'896		222'896
Slovenia	52'078		52'078
Spain	2'437'891		2'437'891
Sweden	613'964		613'964
Switzerland	177'347		177'347
Turkey	382'639	33'283	415'922
Ukraine	462'225	591'389	1'053'614
United Kingdom	473'500		473'500
Total Europe	**17'098'134**	**9'912'919**	**27'011'044**
Total European Union	**14'868'780**	**5'960'746**	**20'829'517**

Source: FiBL-AMI survey 2022 based on Eurostat and national data sources. For data sources, see annex.

Table 69: Europe: Organic producers, processors, and importers by country 2020

For data year, see Table 11: World: Organic producers and other operator types by country 2020, page 59.

Country	Producers	Processors	Importers	Exporters
Albania	130	46		25
Andorra		3		
Austria	24'480	1'691	58	4
Belarus	21	17	1	15
Belgium	2'494	1'585	304	153
Bosnia and Herzegovina	86	51		20
Bulgaria	5'942	249	22	2
Croatia	5'153	395	22	3
Cyprus	1'223	70	16	0
Czech Republic	4'669	852	324	154
Denmark	4'186	1'162	101	104
Estonia	2'050	176	38	18
Faroe Islands	1	1		
Finland	5'102	466	56	33
France	53'255	19'311	662	
Germany	35'396	17'350	1'916	1'349
Greece	29'869	1'653	45	40
Hungary	5'128	521	48	0
Iceland	27	20	2	
Ireland	1'725	26	24	2
Italy	71'590	22'689	544	885
Kosovo	66	21		
Latvia	4'171	65	5	0
Liechtenstein	46			
Lithuania	2'417	124	3	170
Luxembourg	114	104	7	0
Malta	25	8	17	0
Moldova	196	18	5	31
Monaco		2		
Montenegro	423	19		
Netherlands	1'937	993	479	132
North Macedonia	863	24	7	9
Norway	1'981	471	103	0
Poland	18'598	668	267	319
Portugal	5'945	1'036	47	36
Romania	9'647	201	30	27
Russian Federation	48	16		
San Marino		2		
Serbia	439	101	56	100
Slovakia	716	119	43	5
Slovenia	3'685	139	28	0
Spain	44'493	5'561	416	138
Sweden	5'489	1'048	298	15
Switzerland	7'561	1'245	498	32
Turkey	52'590	1'844	84	499
Ukraine	419	70		
United Kingdom	3'581	2'566	216	
Total Europe	**417'977**	**84'799**	**6'792**	**4'320**
Total European Union	**349'499**	**78'262**	**5'820**	**3'589**

Source: FiBL-AMI survey 2022 based on Eurostat and national data sources. For data sources, see annex.
**Total number includes data for countries with less than three operators.*

Table 70: Europe and European Union: Organic trade 2020*

Country	Data year **	Retail sales [Million €]	€/person [€]	Organic share [%]	One year growth [%]	Food-service [Million €]	Exports [Million €]	Imports [Million €]
Austria	2020	2'265.0	253.6	11.3	18.0	109.0		
Belgium	2020	892.0	77.2	3.2	13.0			
Bosnia & Herzegovina	2017	0.4	0.1					
	2018						6.3	
Bulgaria	2019			0.4				
	2020	33.3	5.0					
Croatia	2011						2.9	34.8
	2018	99.3	24.2	2.2				
Czech Republic	2019	204.4	19.1	1.5		11.7	116.6	115.7
Denmark	2019						406.1	646.8
	2020	2'240.0	383.6	13.0	13.0	271.0		
Estonia	2017					9.9		
	2019	61.8	46.8	3.7			27.0	
Finland	2019						27.5	
	2020	409.0	73.9	2.6	11.1			
France	2020	12'699.0	188.0	6.5	12.2	505.0	887.0	2'830.0
Germany	2020	14'990.0	180.3	6.4	22.3	500.0		
Greece	2017	66.0	5.6	0.3				
Hungary	2009						20.0	18.0
	2015	30.0	3.0	0.3				
Ireland	2020	189.3	39.2	2.2	16.2			
Italy	2020	3'872.0	64.1	3.5	4.0	701.0	2'619.0	
Kosovo	2015						6.0	
Latvia	2017	51.0	6.3	1.5			51.0	
Lithuania	2017	50.5	17.8	1.0		5.0	45.0	
Luxembourg	2018					6.0		
	2020	170.9	284.6	9.1	6.8			
Netherlands	2016						1'200.0	
	2019					330.3		
	2020	1'361.1	78.2	3.3	12.4			
Norway	2016			1.7				
	2019	441.8	82.9			29.9		
Poland	2019	314.1	8.3	0.6				
Portugal	2011	21.0	2.0	0.2				
Romania	2011						200.0	35.0
	2016	40.7	2.1	0.2				
Russian Federation	2009						4.0	
	2018	183.0						
Serbia	2012							3.7
	2016						18.9	
Slovenia	2009					0.1	0.1	23.0
	2013	48.6	26.6	1.8				
Spain	2019					54.4		
	2020	2'528.0	53.4	2.5	7.0		1'165.0	1'014.0
Sweden	2018						117.0	
	2020	2'192.8	212.3	8.7	0.7	449.1		
Switzerland	2020	3'602.1	418.4	10.8	19.1			
Turkey	2014	46.2	0.6					
	2017						182.0	540.0
Ukraine	2015							4.0
	2020	38.0	0.9		5.6		178.6	
United Kingdom	2016						193.9	
	2019			1.8				
	2020	2'982.4	44.8		12.6	75.7		
Total Europe* **		**52'000.2**	**63.3**		**14.9%**			
Total EU * **		**44'829.8**	**101.8**		**15.1%**			

Source: FiBL-AMI survey 2022 based on national data sources. For details on data sources, see annex.

*Note on the table:
› Where no published data exists, best estimates from experts were used.
› 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 2020 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.
** «Data year» refers to the year from which the data are. As stated above, not all countries provided up-to-date data.
*** Please note that in particular, for export and import values, the data are not complete.

Table 71: European Union: EU organic imports by member state 2020 (EU 27)

Country	2018 [MT]	2019 [MT]	2020 [MT]
Austria	35'920.9	28'379.1	30'766.2
Belgium	177'959.5	371'911.6	303'002.3
Bulgaria	12'280.6	14'847.1	15'330.7
Croatia	3'559.3	1'059.0	540.4
Cyprus	211.2	251.6	139.9
Czech Republic	29'492.6	19'956.0	25'020.6
Denmark	127'413.1	120'704.8	82'116.4
Estonia	474.8	326.1	313.0
Finland	14'987.7	18'921.3	18'421.1
France	213'625.3	240'582.4	274'620.0
Germany	427'615.9	432'897.1	491'718.5
Greece	6'368.0	8'269.8	10'180.1
Hungary	2'061.7	991.8	991.5
Ireland	19'476.4	4'099.4	61'778.5
Italy	185'803.0	180'388.1	236'106.3
Latvia	52.4	3'359.4	520.0
Lithuania	2'797.5	8'346.2	33'144.3
Luxembourg	487.8	47.2	65.1
Malta	1.0	8.8	60.0
Netherlands	953'037.8	1'037'553.5	857'360.6
Poland	19'330.4	29'285.3	36'077.2
Portugal	7'238.9	4'305.1	7'070.4
Romania	8'816.7	9'025.7	10'888.7
Slovakia	455.0	617.0	251.6
Slovenia	17'460.9	22'418.9	6'458.3
Spain	78'818.2	100'140.1	112'183.6
Sweden	167'269.1	190'023.2	178'977.7
European Union Undefined	197'612.1		
Total	**2'710'628.0**	**2'848'715.5**	**2'794'103.1**

Source: EU organic import volume (MT): TRACES/European Commission

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Latin America and the Caribbean



Map 5: Organic agricultural land in the countries of Latin America and the Caribbean 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322.

Latin America

Patricia Flores[1]

Latin America, and especially Peru, were badly hit by the pandemic. This chapter is dedicated to the memory of all those who died due to COVID-19, farmers, rural service providers and in general, agents of change and organic activists who lost the battle against COVID-19 but whose legacy remains bright in the present and future generations. Our thanks for what they taught and shared, helping us continue to grow and be better human beings every day.

Another year has passed since WHO declared the COVID-19 epidemic a public health emergency of international concern on January 30, 2020. The pandemic has led to many changes in all dimensions of life, and the food and agriculture sector is no exception.

When a disruptive element occurs on the planetary scale that the COVID-19 pandemic has, it suggests that the emerging future will not be the same as what we understand today, particularly our understanding of how systems work. With the slogan "the countryside (*campo*) does not stop", food production, distribution and consumption were not only maintained but grew following the most complicated phase of the first months of 2020. In addition to a dynamic agro-export sector, the high demand for organic products triggered several initiatives for the direct sale of fresh produce from family farms at the national level and the use of digital platforms and communication campaigns to acknowledge the work of small-scale producers. In this sense, the initiatives of organic producers have been very efficient and have come to meet the expectation of health concerns.

Latin American food systems showed resilience against all predictions, even with critical points expressed in price increases for various reasons. However, the recovery of this sector is remarkable, which is reflected in the statistics. To highlight this, we focus on Peru.

Country focus: Peru

Peru currently has 464'546.85 hectares dedicated to organic production and 95'157.84 hectares in the process of transition, certified by agencies authorized by SENASA, the national authority in charge (2020 data).

It is estimated that 107'367 producers are engaged in this area, of which 94 percent are small farmers, who are associated with group operators, complying with national organic standards and demanding international markets.

The main organic crops include coffee (124'132 hectares), Brazil nuts (210'609 hectares), cocoa (52'191 hectares), quinoa (10'625 hectares) and bananas (7'419 hectares). The

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European Union, the United States and Asia are the main destination markets for these products.

Emerging crops that are adding to the development of agricultural exports are blueberries, ginger, avocado, mango, grapes and pomegranate, which are well accepted by consumers internationally.

According to the Peruvian Foreign Trade Society (COMEX), agricultural exports grew by 21 percent only in the first half of 2021. The United States continues to be the leading destination country.

Among the products that stood out most in this category were avocados, with a total export value of 881 million US dollars, and fresh grapes, with 516 million US dollars, a respective increase of 43.8 and 22.6 percent over one year. It is worth noting that ginger exports between 2013-2021 recorded an average annual growth of 49 percent.

GMO Moratorium

On January 6, 2021, Congress published the law that extends the moratorium on the entry and production of genetically modified organisms (GMO) to the national territory for 15 years, until December 31, 2035.

The purpose of the moratorium is to prevent the entry and production of GMOs for cultivation or breeding purposes, including aquatic organisms, to be released into the environment.

Among the multiple benefits of the GMO moratorium is the mandate to develop baselines of biodiversity potentially affected by GMOs. With the extension of this law, new baselines will be developed. Studies were conducted and published on corn, cotton, potato, tomato, squash and pumpkin. The remaining studies are on ornamental fish, chilli, cassava, papaya, beans and alfalfa.

In Peru, genetic diversity is an outstanding capital thanks to conservationist families who have developed and genetically improved the selection of varieties and breeds adapted to each territory and climate in Peru.

The second agrarian reform

Peru has had a new administration since July 2021. The guidelines for the second agrarian reform were launched as a government policy aiming to generate added value in agriculture, the productive transformation of the countryside, the development of irrigation infrastructure and technological innovation.

These guidelines seek to guide actions coordinated among the different levels of government to sustainably increase the income and quality of life of family, cooperative, community and entrepreneurial producers in the food and agricultural sector.

What are these guidelines?

– To implement a new form of government for the agrarian and rural world.
– To promote more and better markets for family farming and food security.

- To promote added value in agricultural products and the productive transformation of the countryside.
- To improve water security and further develop irrigation infrastructure in a planned and prioritised manner in the territory, with a basin approach responding to demand, especially from family farming.
- To promote technological change and innovation, services and agricultural and forestry development.

The lines of action include protecting the production of family farming, implementing public procurement from smallholders, promoting the development of producers' markets and encouraging business plans and rural enterprises.

It also includes productive transformation with added value, harvesting of water (siembra y cosecha de agua), irrigation technology and hydric recharge, access to credit and the development of quality seeds.

The competitive production of fertilisers, also mentioned in the guidelines, is observed with concern. The organic movement insists on transitioning from chemical inputs to encouraging organic production and the application of the organic principles: health, ecology, fairness and care.

What the future holds for us

A reflection on the effects of the pandemic shows us the need for governments, the private sector, producer organisations and community institutions to take a long-term view. It also shows the need to enhance their capacities to better respond to multiple threats and systemic risks, make decisions and provide services to build inclusive value chains that create employment.

Economic recovery is intimately linked to resilience. And resilience is achieved with public policies that accelerate a transformation towards true sustainability, with a large share of innovation. These policies must take into account the views and visions of all stakeholders, especially the most vulnerable, which are small producers and small and medium-sized enterprises along the food systems value chain.

Therefore, it is important to take this crisis as an unprecedented opportunity to rethink how our food systems function and adopt recovery measures that will enable us to move, in the long term, to more inclusive, sustainable and resilient agricultural economies. This is of utmost importance, considering that Latin America is the most unequal region on the planet, according to CEPAL (Guadin 2020).

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Latin America and the Caribbean: Current statistics

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

Overview

In 2020, over 9.9 million hectares were reported as being under organic production in Latin America and the Caribbean (a total of 44 countries). This corresponded to 1.4 percent of the total agricultural land in that region (Table 72). Of the organic agricultural land worldwide, 13.3 percent were recorded in Latin America and the Caribbean. Compared to 2019, the organic agricultural area in that region grew by over 1.6 million hectares. Since 2000 the area has more than doubled (an increase of over 6 million hectares) (Figure 93). Since 2001, the countries with the largest organic agricultural area are Argentina, Uruguay, and Brazil. From 2019 to 2020, the organic agricultural area in Argentina grew by 21 percent, reaching over 4.4 million hectares; in Uruguay, it increased by 28 percent, reaching over 2.7 million hectares, and in Brazil, it increased by 3 percent, reaching over 1.3 million hectares (Figure 91). The countries with the highest organic share in 2020 were Uruguay with 19.6 percent (highest share since 2014), French Guiana with 11.3 percent, and the Dominican Republic with 4.8 percent (Figure 92).

Land use

In 2020, land use details were available for 90 percent of the organic agricultural land in Latin America and the Caribbean – 5 percent arable crops (almost 450'000 hectares), 8 percent permanent crops (over 770'000 hectares), and 77 percent permanent grassland/grazing areas (over 7.6 million hectares). For 10 percent of the organic agricultural land, no land use information was available.

Since 2010, the most important organic **arable crop group** has been cereals (mainly quinoa), with almost 160'000 hectares in 2020, followed by sugarcane which is among the three most important organic arable crops since 2005 (except for 2012), reaching over 82'000 hectares in 2020. Organic oilseeds have been gaining importance, reaching 76'000 hectares in 2020 (about half of it sesame and soybeans) (Figure 94, Table 74). The countries with the largest organic arable crop areas were Bolivia with over 123'000 hectares (mainly cereals), followed by Peru with almost 79'000 hectares (more than half cereals and fallow land), and Paraguay (mostly sugarcane), Argentina (mostly sugarcane, cereals, and oilseeds), and Mexico (mostly vegetables and dry pulses) each with about 60'000 hectares of organic arable cropland.

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– Organic **cereals** were grown on almost 160’000 hectares, representing 0.3 percent of the total cereal area in the region and 3.1 percent of the world’s organic cereal area. Most organic cereals were grown in Bolivia (94’000 hectares) and Argentina (almost 24’000 hectares). The key organic cereal was quinoa (over 111’000 hectares). Organic quinoa represented 69.7 percent of the total organic cereal area in the region. Organic quinoa was mainly grown in Bolivia (over 92’000 hectares), constituting 83.1 percent of the total organic quinoa area in the region.
– Organic **sugarcane** was grown on over 82’000 hectares, representing 0.6 percent of the total sugarcane area in the region and 83.9 percent of the world’s organic sugarcane area. Most organic sugarcane was grown in Paraguay (over 35’000 hectares) and Argentina (over 18’000 hectares).
– Organic **oilseeds** were grown on 76’000 hectares, representing 0.1 percent of the total oilseeds area in the region and 4.3 percent of the world’s organic oilseeds area. Most organic oilseeds were grown in Bolivia (almost 29’000 hectares), Argentina (almost 14’000 hectares), and Mexico (almost 13’000 hectares). Key organic oilseeds were sesame (almost 22’000 hectares) and soybeans (over 11’000 hectares). Organic sesame represented 28.5 percent of the total organic oilseeds area in the region. Organic sesame was mainly grown in Bolivia (over 8’000 hectares), constituting 38.0 percent of the total organic sesame area in the region. Organic soybeans represented 15.0 percent of the total organic oilseeds area in the region. Organic soybeans were mainly grown in Argentina (over 7’000 hectares), constituting 64.8 percent of the total organic soybeans area in the region.

As in previous years, the most important organic **permanent crops** were coffee, with over 351’000 hectares, followed by cocoa, reaching almost 167’000 hectares, and tropical and subtropical fruit, with almost 113’000 hectares (more than half bananas). The countries with the largest organic permanent crop areas were Peru with almost 260’000 hectares (mainly coffee and cocoa), followed by Mexico with over 146’000 hectares (mainly coffee, tropical and subtropical fruit, and citrus fruit) and the Dominican Republic, with over 117’000 hectares (mainly cocoa and tropical and subtropical fruit).

- Organic **coffee** was grown on over 351’000 hectares, representing 6.7 percent of the total coffee area in the region and 47.2 percent of the world’s organic coffee area. Most organic coffee was grown in Peru (over 169’000 hectares) and Mexico (nearly 83’000 hectares).
- Organic **cocoa** was grown on almost 167’000 hectares, representing 9.6 percent of the total cocoa area in the region and 43.3 percent of the world’s organic cocoa area. Most organic cocoa was grown in Peru (over 73’000 hectares) and the Dominican Republic (over 67’000 hectares).

- Organic **tropical and subtropical fruit** was grown on almost 113'000 hectares, representing 2.8 percent of the total tropical and subtropical fruit area in the region and 39.9 percent of the world's organic tropical and subtropical fruit area. Most organic tropical and subtropical fruit was grown in the Dominican Republic (over 35'000 hectares), Mexico (over 29'000 hectares), Ecuador (over 17'000 hectares), and Peru (over 15'000 hectares). The key organic tropical and subtropical fruit were bananas (over 71'000 hectares). Organic bananas represented 63.3 percent of the total organic tropical and subtropical fruit area in the region. Organic bananas were mainly grown in the Dominican Republic (almost 34'000 hectares), constituting 47.1 percent of the total organic bananas area in the region.

The countries with the largest organic permanent grassland/grazing areas were Argentina (nearly 4.4 million hectares) and Uruguay (over 2.7 million hectares).

Wild collection

In Latin America and the Caribbean, organic wild collection plays an important role. In 2020, there were nearly 3.1 million hectares of organic wild collection areas. Crop details were only available for 29.6 percent of the total organic wild collection area in the region. Most of this area was used to collect wild nuts (nearly 806'000 hectares) (Table 75). The countries with the largest organic wild collection areas were Mexico (nearly 1.9 million hectares), Bolivia (almost 578'000 hectares), and Peru (217'000 hectares). 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.

Producers

Over 270'000 organic producers were recorded in Latin America and the Caribbean in 2020. The countries with the most organic producers were Peru (over 107'000), Mexico (nearly 46'000), and Brazil (nearly 25'000) (Table 72). 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.

For more information about the Latin American and the Caribbean figures, see data tables for the region, page 280.

Organic Agriculture in Latin America and Caribbean: Graphs

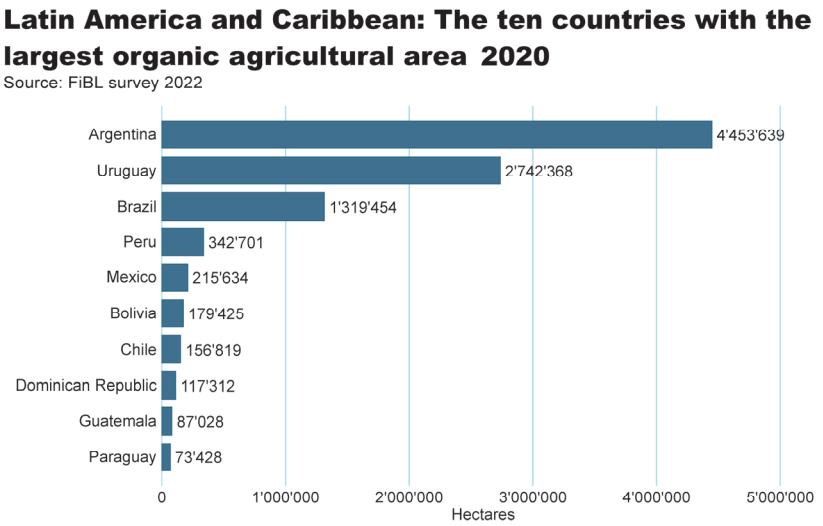


Figure 91: Latin America and Caribbean: The ten countries with the largest areas of organic agricultural land 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

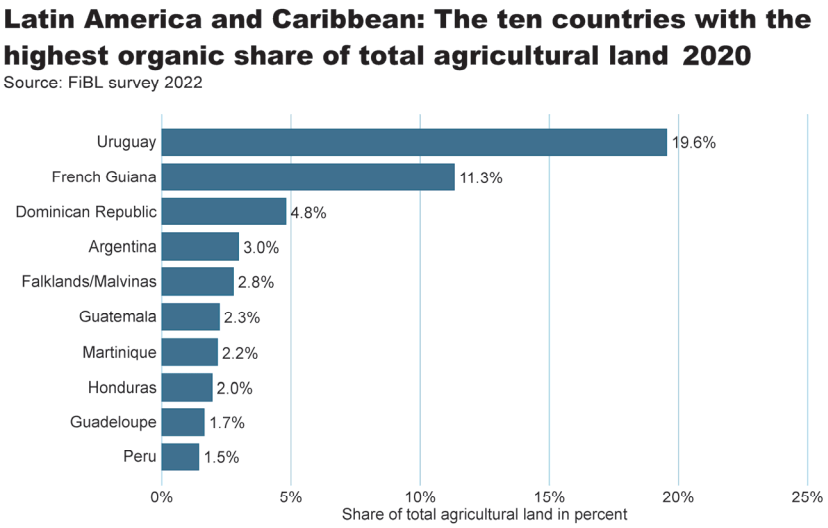


Figure 92: Latin America and Caribbean: The ten countries with the highest organic share of total agricultural land 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

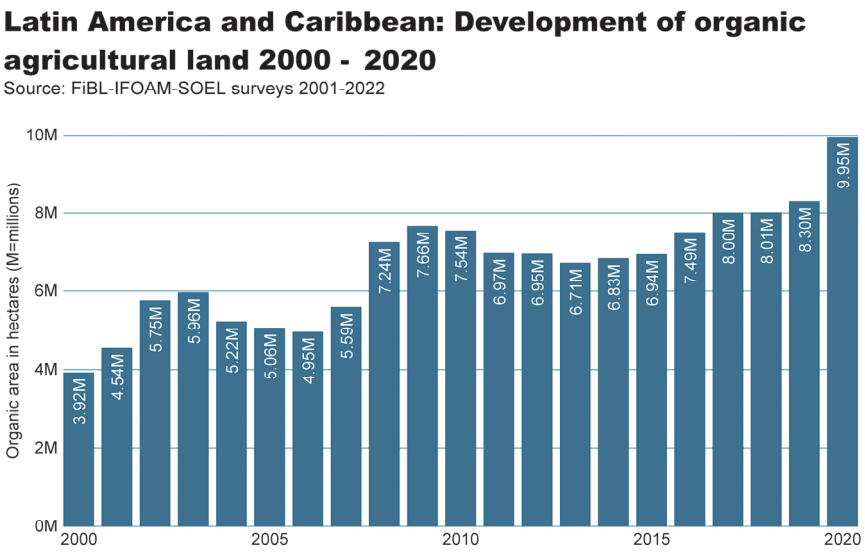


Figure 93: Latin America and Caribbean: Development of organic agricultural land 2000-2020

Source: FiBL-IFOAM-SOEL surveys 2001-2022

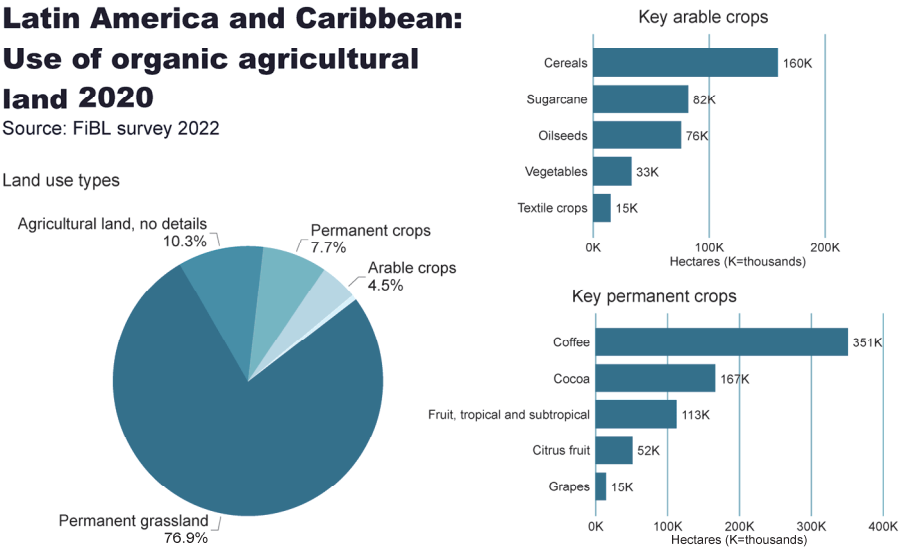


Figure 94: Latin America and Caribbean: Use of agricultural organic land 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Organic Agriculture in Latin America and Caribbean: Tables

Table 72: Latin America: Organic agricultural land, organic share of total agricultural land, and number of producers 2020

Country	Area [ha]	Organic share [%]	Producers [no.]
Argentina	4'453'639	3.0%	1'343
Bahamas	49	0.3%	1
Belize	454	0.3%	374
Bolivia (Plurinational State of)	179'425	0.5%	14'161
Brazil	1'319'454	0.6%	24'975
British Virgin Islands	26	0.4%	1
Chile	156'819	1.0%	2'200
Colombia	50'533	0.1%	3'160
Costa Rica	11'465	0.6%	47
Cuba	2'129	0.03%	8
Dominican Republic	117'312	4.8%	15'563
Ecuador	41'537	0.8%	13'711
El Salvador	2'569	0.2%	375
Falkland Islands (Malvinas)	31'937	2.8%	3
French Guiana (France)	3'690	11.3%	98
Grenada	84	1.1%	23
Guadeloupe (France)	858	1.7%	181
Guatemala	87'028	2.3%	5'366
Haiti	2'907	0.2%	4'632
Honduras	66'179	2.0%	15'046
Jamaica	10	0.002%	
Martinique (France)	683	2.2%	107
Mexico	215'634	0.2%	45'954
Nicaragua	39'076	0.8%	8'511
Panama	5'929	0.3%	18
Paraguay	73'428	0.3%	5'850
Peru	342'701	1.5%	107'367
Suriname	52	0.1%	1
Uruguay	2'742'368	19.6%	1'388
Venezuela (Bolivarian Republic of)	1'490	0.01%	7
Total*	**9'949'461**	**1.4%**	**270'472**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322
**Total number includes data for countries with less than three operators.*

Table 73: Latin America: All organic areas 2020

Country	Agriculture [ha]	Aquaculture [ha]	Forest [ha]	Other non agri. land [ha]	Wild collection [ha]	Total [ha]
Argentina	4'453'639			21'782		4'475'421
Bahamas	49					49
Belize	454					454
Bolivia	179'425			577'991		757'416
Brazil	1'319'454			10'605		1'330'059
British Virgin Islands	26					26
Chile	156'819			130'526		287'345
Colombia	50'533			45'200		95'733
Costa Rica	11'465					11'465
Cuba	2'129					2'129
Dominican Rep.	117'312			3'081		120'393
Ecuador	41'537	2'122	40'007	764		84'429
El Salvador	2'569					2'569
Falklands/Malvinas	31'937					31'937
French Guiana	3'691					3'691
Grenada	84					84
Guadeloupe	859					859
Guatemala	87'028			159'412		246'440
Guyana				55'449		55'449
Haiti	2'907					2'907
Honduras	66'179					66'179
Jamaica	10			7		17
Martinique	683					683
Mexico	215'634		4	1'853'653		2'069'291
Nicaragua	39'076					39'076
Panama	5'929					5'929
Paraguay	73'428				988'604	1'062'032
Peru	342'701			217'004		559'705
Suriname	52					52
Uruguay	2'742'368					2'742'368
Venezuela	1'490					1'490
Total	**9'949'461**	**2'122**	**40'011**	**3'075'474**	**988'604**	**14'055'674**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Table 74: Latin America: Land use in organic agriculture 2020

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		1'020'055
Arable land crops	Cereals	159'516
	Dry pulses and protein crops for the production of grain	11'120
	Fallow land, crop rotation	15
	Flowers and ornamental plants	16
	Fresh vegetables and melons	33'245
	Industrial crops	10'195.5
	Medicinal and aromatic plants	7'744
	Mushrooms and truffles	88.43
	Oilseeds	76'007
	Plants harvested green	8'363
	Root crops	3'481
	Strawberries	2'256
	Sugarcane	82'265
	Textile crops	15'257
	Tobacco	69
	Arable crops, no details	40'330
Arable land crops Total		449'967
Other agricultural land		62'413
Permanent crops	Berries	11'453
	Citrus fruit	51'713
	Cocoa	166'564
	Coconut	6'065
	Coffee	351'371
	Flowers and ornamental plants, permanent	46
	Fruit	3'363
	Fruit of temperate climate zones	8'466
	Fruit, tropical and subtropical	112'765
	Fruit/nuts/berries	6
	Grapes	14'682
	Medicinal and aromatic plants, permanent	3'070
	Nurseries	4
	Nuts	3'378
	Olives	6'100
	Tea/mate, etc.	2'265
	Permanent crops, other	28'822
Permanent crops Total		770'133
Permanent grassland		7'646'895
Total		**9'949'461**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Table 75: Latin America: Use of wild collection areas 2020

Land use	Area [ha]
Forest products	2'000
Fruit, wild collection	4'839
Medicinal and aromatic plants, wild	40'627
Nuts, wild collection	805'860
Palmito, wild	56'649
Wild collection, no details	2'165'499
Total	**3'075'474**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

North America



Map 6: Organic agricultural land in Canada and the United States 2020

Source: Canada Organic Trade Association (COTA) and United States Department of Agriculture (USDA). For detailed data sources, see annex, page 322.

Organic in the United States: Sales Surpass 60 Billion Dollar Mark

Barbara Fitch Haumann[1]

U.S. organic sales soared to a new high in 2020, jumping by 12.4 percent to 61.9 billion US dollars. This marked the first time that total sales of organic food and non-food products surpassed 60 billion US dollars and reflected a growth rate more than twice the 2019 pace of 5 percent, according to the Organic Trade Association's 2021 Organic Industry Survey.

The U.S. organic industry is comprised of over 27'000 certified farms and businesses, and U.S. organic food sales continue to grow at a rate more than double the growth rate of the overall U.S. food market. U.S. organic penetration reached nearly 6 percent (5.8%) of food sales, with a total of 56.5 billion US dollars. The largest category-- organic fruit and vegetable sales--reached 15 percent of all retail produce sales in the United States and is predicted to push past 50 percent by the year 2030. Meanwhile, non-food organic sales grew by nearly 9 percent to reach 5.4 billion US dollars.

Since the beginning of the pandemic, more consumers than ever have been seeking healthier choices, looking for "clean ingredients" to feed their families.

Pantry stocking was overwhelmingly the main growth driver. As bread making and baking became more popular pastimes, sales of organic flours and baking ingredients grew by 30 percent. Consumers also turned to products to make meals more appealing. Sales of sauces and spices pushed the 2.4 billion US dollar condiments category to a growth rate of 31 percent, and organic spice sales jumped by 51 percent, more than triple the growth rate of 15 percent in 2019.

Meanwhile, meat, poultry and fish - the smallest organic category at 1.7 billion US dollars - experienced its second-highest growth rate of nearly 25 percent.

In a late November article in Food Navigator-USA.com, a General Mills spokesperson noted that 92 percent of households in the U.S. now use natural and organic products.

International trade

International export and trade programs play a vital part in the strength of U.S. organic agriculture. Global organic food and drink sales reached 129 billion US dollars in 2019, with the U.S. accounting for 42 percent of the global marketplace as the largest single-country producer.

The U.S. currently maintains seven organic equivalence agreements with many of its largest trading partners: Canada (signed in 2009), the European Union (2012), Japan (2014), South Korea (2014), Switzerland (2015), Taiwan (2020), and the United Kingdom (2021). These recognize two systems as comparable and verifiable, although not necessarily identical. Ultimately, they allow exporters to sell many, if not all, of their

[1] Barbara Fitch Haumann is Senior Writer/Editor for the Organic Trade Association.

products into foreign markets as organic products without needing certification to a foreign standard.

Of note, the U.S. ended its organic recognition agreement with India in 2021 due to a lack of consistent communication from India's government as well as oversight concerns. Operators in India previously exporting to the U.S. who wish to continue must be certified directly by a NOP accredited certifier by July 12, 2022.

After a robust year of trade events held largely behind computer screens, the Organic Trade Association (OTA) is gearing up for a busy 2022 of in-person events and opportunities to show off U.S. organic products abroad. As the nation's only organic-focused trade association, OTA has been the US Department of Agriculture's (USDA) go-to partner for promoting organic products internationally for nearly 20 years. This year, USDA awarded OTA 906'379 US dollars in Market Access Program (MAP) funds to support the association's international promotion efforts, the largest MAP award OTA has received to date.

According to tracking data from USDA, the value of U.S. organic exports nearly doubled between 2011 and 2019 – increasing from just over 400 million US dollars in 2011 to nearly 700 million US dollars in 2019. Canada and Mexico are the United States' largest export partners, with Japan, South Korea, Taiwan, the EU, and United Arab Emirates all making the top 10 list for U.S. organic exports.

OTA will leverage MAP funding to bring US organic companies to international markets where demand is strong, increasing consumer awareness of U.S. organic products. OTA will also host a wide range of consumer promotion projects across Asia and the Middle East, with events geared toward importers, distributors, and consumers. The market promotion activities administered by the Association are open to the entire organic industry, not just members.

Supply constraints

The continuation of the pandemic, however, has created some supply constraints in the organic food supply. Supply chain challenges continued in 2021, complicated by gridlock at coastal ports. Across all organic categories, sales growth was limited by supply chain challenges, affecting producers, distributors, retailers and brands. Also, packaging was in short supply, as were workers and drivers transporting products, making it more difficult to ramp up processing to meet consumer demand.

Meanwhile, Secretary of Agriculture Tom Vilsack met with U.S. stakeholders to discuss a crisis facing organic dairy farms in northern New England that were losing buyers for their products. The outcome was the establishment of a task force to look at solutions to assist impacted farmers and address larger issues within the organic dairy supply chain.

Working with a new administration

In early 2021, President Biden and Vice President Harris were sworn into office. The Organic Trade Association released a memo to the transition team at USDA and the

White House outlining key priorities and immediate actions the new administration should take to support organic.

In February, Thomas Vilsack was confirmed by the Senate to serve as the Secretary of Agriculture, returning to the Department after previously serving eight years under President Obama. In his confirmation hearing, Secretary Vilsack laid out his vision for USDA:

- Transforming U.S. agriculture as a solution to fight climate change,
- Fighting hunger and nutrition insecurity,
- Restoring openness and competitiveness of U.S. agriculture markets, and
- Advancing equity.

Meanwhile, the following "asks" submitted by the trade association submitted to the new administration brought some positive results.

Restore leadership with experience in organic

Secretary Vilsack tapped Jenny Lester Moffitt to serve as Under Secretary of Marketing and Regulatory Programs at USDA, the agency in charge of the National Organic Program. Moffitt has deep-rooted connections to the organic industry.

Restore the organic and sustainable agriculture policy advisor role

By October, Secretary Vilsack named Marni Karlin to fill the post of Senior Advisor, Organic and Emerging Markets - a sustainable and organic advisor position with the Secretary's office to ensure organic interests are represented at the highest level within USDA. Karlin has 20-plus years of experience in the organic, agriculture and food sectors.

Restore full funding for organic certification cost share

USDA announced 20 million US dollars in new funding for the organic certification cost-share program, reversing the cuts from 2020, which limited reimbursement rates to 50 percent of certification fees. It was made available through the new Organic and Transitional Education and Certification Program as part of USDA's broader Pandemic Assistance for Producers initiative.

Still pending are requests to reinstate the Organic Livestock and Poultry Practices (OLLP) rule and publish a final rule on the Origin of Livestock. At the end of 2021, OTA was still involved in litigation with the USDA on the withdrawal of the OLPP rule. Meanwhile, the Origin of Livestock rule, which has been 18 years in the making, was stalled yet again.

Climate change and sustainability

At the start of 2021, the independent Sustainable Food Trade Association (SFTA) disbanded to consolidate with the Organic Trade Association to strengthen the organic sector's voice in climate policy and sustainability issues and boost the sector's efforts to create an environmentally friendly sustainable food system. The result: the formation of the Organic Trade Association's Sustainable Food Trade Action Council (SFTAC),

which offers effective tools for organic businesses to build, measure and refine their sustainability programs.

In May, SFTAC and the Organic Trade Association hosted a UN Food Systems Summit dialogue focusing on organic as a solution to meet increasing demands from consumers and global markets to address environmental pressures and to achieve UN sustainable development goals. The event brought together 57 diverse stakeholders to look at the ways organic can help address hunger, poverty, climate change and inequality. Six small breakout discussions took place to ensure a deep dive into separate issues, and formal feedback was then provided to the UN. The resulting summary report was submitted for inclusion at the United Nations' first-ever Food Systems Summit in September--the follow-up to a year of involvement by hundreds of farmers, producer groups, academics, scientists, governments, non-profit associations, and indigenous communities around the world.

Diversity

Diversity and inclusion in the organic sector have also been raised to the forefront, with the Organic Trade Association announcing its goal to help shape a more inclusive agricultural future for the good of the organic market and our communities. Modeling the work of the One Step Closer™ J.E.D.I. (Justice, Equity, Diversity and Inclusion) Collaborative for the natural products industry, the Organic Trade Association has adopted a JEDI statement and commitment. As a result, it established a Diversity Council to help create a foundation for the organic industry to further this work. As part of this, the trade association is extending a complimentary two-year membership to BIPOC (Black, Indigenous and People of Color)-owned farms and businesses.

In addition, The Organic Center, under the administrative auspices of the Organic Trade Association and IFOAM North America, offered webinars in December exploring justice for Black farmers in the United States.

Legislation in the pipeline

On the legislative front, the bipartisan Continuous Improvement and Accountability in Organic Standards Act (CIAO) was introduced in the U.S. House of Representatives in April. This legislation directly addresses the challenges of organic over the past two decades and provides a clear way to ensure the federal government keeps up with the organic market. It lays out a road forward for organic through three areas: it requires USDA to clear the backlog of stalled organic standards put forth by the industry and recommended by the National Organic Standards Board; it establishes a new framework for advancing future organic standards, and it ensures consistent application of new standards from organic certifiers.

In the past ten years, the organic industry has advanced 20 recommendations for improvements to organic standards, yet USDA has not completed rulemaking on a single one. This bill is the result of a broad coalition of farmers, industry, consumers and environmental organizations working together with Congress.

Related to this, the Organic Trade Association and the Swette Center for Sustainable Food Systems at Arizona State University launched a series of virtual workshops in fall 2021 for a diverse coalition of stakeholders to look at the changing needs of organic, explore ways to improve organic and discuss how to build upon organic's successes. The outcomes of these workshops will help shape strategies on how to update the Organic Foods Production Act in the next U.S farm bill.

Meanwhile, in 2020, USDA's National Organic Program (NOP) published its Strengthening Organic Enforcement (SOE) proposed rule to support the continued growth of the organic market and improve oversight at critical links in the supply chain. This 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.

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, prevent fraud, and 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.

USDA's Strengthening Organic Enforcement (SOE) Final Rule is slated for release this coming spring. This action - the largest single piece of rulemaking since the implementation of the National Organic Program - will have a game-changing impact on improving oversight of organic systems and reducing the chance of organic fraud.

Meanwhile, OTA's Retailer Council, established in 2019, is working together for networking and problem-solving. Its first objective has been to modernize the association's Good Organic Retail Practices (GORP) guide. This manual is an educational resource and introduction to handling, storing and selling organic products in the United States. It is designed to provide insight on how to protect the organic integrity of products through retail channels.

This tool is an important guide to help retailers ensure both organic compliance with the National Organic Program and establish best practices that build consumer confidence and protect organic integrity. First published in 2002, the trade association's GORP training guide was widely distributed and has assisted many retail establishments. Since then, the retail environment and organic industry have changed significantly. The updated GORP guide, now available, reflects these changes and provides provisions to cover the virtual marketplace. With the current pandemic, the latter has gained prominence for retailers wishing to increase their reach and sales.

References

Organic Trade Association's 2021 Organic Industry Survey
FiBL & IFOAM - Organics International, The World of Organic Agriculture 2021.
Food Navigator, General Mills talks growth of natural and organic segment (https://www.foodnavigator-usa.com/Article/2021/11/24/General-Mills-talks-growth-of-natural-and-organic-segment).
USDA Global Agricultural Trade System June 2021.
OTA takes U.S. Organic back on the Road (https://ota.com/news/press-releases/21963)
Organic Fraud Prevention Solutions (https://ota.com/OrganicFraudPrevention)

Canada

TIA LOFTSGARD[1]

Slowed growth in certified organic farms and processors through the pandemic

The Canadian organic sector experienced disruptions like most other regions of the world in 2020 as the growing season commencement collided with the national lockdown, causing global disruptions to all industries. Still, a nominal growth (1.9 percent) occurred in 2020 in organic operators. At the end of 2020, there were 7514 certified operations. There was a 5.4 percent increase in certified producers (nearly 300 producers) during COVID-19's first year, bringing the total in Canada to 5971. Certified processors experienced nominal growth of 1.1 percent, and the livestock sector declined slightly – by 1.4 percent to 799 certified livestock operations. Grocery habit studies indicated that consumer demand grew during the pandemic and that organic was more important than ever! Yet the supply chain was challenged to deliver as producers struggled with extreme climate events, lack of critical supplies (seed and inputs), trade challenges and particularly labour as the growing season intersected with the onset of the pandemic in March to June 2020. Despite all the obstacles, many more acres were converted to organic in 2020! Organic acreage increased by 19 percent to more than 3.65 million acres or almost 1.5 million hectares.

Continued strong demand for organics

The overall organic sector, which includes all other non-regulated products such as textiles and pet food, grew to 8.1 billion Canadian dollars in 2020. Organic food and beverage sales in 2020 topped 6.5 billion Canadian dollars, about 33 percent higher than that recorded in 2017. The non-food segments grew at a higher rate than food and beverages (14.9 percent versus 10.2 percent), which is reflective of the fact that these segments, even though not regulated under the Canada Organic Regime (COR), remain a growth opportunity for organic producers. While the overall growth rate is higher than that of our neighbours to the south, the Canadian organic industry still has more growth ahead before reaching the same level of maturity as seen in the United States.

Food and beverages account for just over 80 percent of the organic market, followed by alcoholic beverages at 5.3 percent, and organic fibre and supplements, each representing close to 2.5 percent of overall sales of organic. Collectively, organic sales of non-food and beverage sectors in 2020 topped 583 million Canadian dollars[2]. Organic exports in 2020, tabulated by the federal government via HS code systems, totalled more than 600 million Canadian dollars, which only represents a portion of total organic exports (the number of HS code-tracked items is limited).

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[1] Tia Loftsgard, Executive Director, Canada Organic Trade Association, Ottawa, Canada, www.canada-organic.ca

[2] 381 euros (based on 2020 exchange rate according to the European Central Bank)

Growing health consciousness is a key driver of demand for organic food. In 2020, more people were eating organic food than ever before, and while the overall food market reportedly grew at a rate of 23.4 percent between 2017 and 2020, the organic food marketplace grew at 57.3 percent in the same period.

Organic produce continues to be the gateway to organic. As organic produce has been made more readily available nationally in mainstream grocers, more consumers are entering the organic retail environment. In the packaged and prepared category, growth was driven by convenience, refrigeration and special diets. The baby food market, for instance, saw an uptick in growth of more than 500 percent since 2012 as parents strongly chose organics for their children. Plant-based foods continue to be an important subcategory in the packaged and prepared food market, with sales growing by more than 150 percent since 2017.

Organic breads and grains showed year-over-year growth of 15 percent since 2017, driven by new alternative grain, high-fibre and high-protein offerings.

Organic snacks reached 132 million Canadian dollars[1] in sales in 2020, driven in part by Canadian consumers increasingly choosing organic chocolate and more and more parents opting for organic snacks for their toddlers and infants.

Where Canadians purchase organic is changing

Mass market grocery store channels continue to capture the majority of Canadian organic food and beverage dollars, a lead that was strengthened by pandemic restrictions during 2020. Online purchase options, which had seen strong growth in 2019, were chosen by a growing number of first-time users in Canada who chose not to leave their homes for grocery shopping in 2020.

National natural health chains and club/warehouse stores have continued their support for organic, and sales have followed suit. Once the mainstay of organic retailing in Canada, the landscape of independent natural health food stores is shifting through attrition and amalgamation into smaller regional chains.

Increased emphasis on the healthfulness of food, as well as local supply and food security concerns, drove continued support of farmers' markets across Canada. Restaurant closures as a result of pandemic measures resulted in a significant drop in organic sales through the foodservice channel in 2020.

Canada's position in the global market place

Canada continues to be a net importer of organics on the world stage. Looking at Harmonized Sales (HS) code data provided by the federal government, Canadian exports have remained stagnant in recent years, with 2020 data showing organic exports at more than 600 million Canadian dollars. As stated previously, only 17 commodities are tracked using the HS system; therefore, this export figure represents only a portion of all Canadian organic products exported in 2020. Of these tracked

[1] 68 million euros (based on 2020 exchange rate according to the European Central Bank)

commodities, organic green lentils and organic maple syrup are the products most often exported from Canada.

Canadian organic imports totaled more than 800 million Canadian dollars in 2020, a growth of over 30 percent since 2016. Ontario imports almost one-half of Canada's organics, followed by British Columbia at 30 percent; however, both provinces are the points of entry for those products and not solely the regions of consumption. Unroasted coffee and bananas top Canada's organic import lists in both volume and dollar value.

Organic equivalency arrangements continue to provide smooth market access for both importers and exporters. In 2020, Canada signed new equivalency arrangements with Taiwan and the United Kingdom, expanded the scope of the Japan arrangement, and it continues discussions with both Mexico and South Korea.

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], AND JAN TRÁVNÍČEK[3]

Overview

North America's organic agricultural land was over 3.7 million hectares in 2020, 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 5.0 percent of the global organic agricultural land. Between 2019 and 2020, the area increased by almost 97'000 hectares or 3 percent. In 2020, 2.4 percent of the farmland in Canada was organic, and the proportion in the United States was 0.6 percent. There was a total of over 22'000 producers in North America, most of them in the United States (73.4 percent).

Land use

Land use details were available for 84 percent of the organic agricultural land. In 2020, only 6 percent of all organic farmland was utilized for permanent crops (almost 218'000 hectares), while 33 percent was used to grow arable crops (over 1.2 million hectares) and 46 percent (over 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 915'000 hectares.

The key organic arable crop group was cereals, with almost 543'000 hectares, representing 0.8 percent of the total cereal area in the region and 10.7 percent of the world's organic cereal area. In the United States, over 290'000 hectares of organic cereals were grown, and Canada reported nearly 253'000 hectares. The key organic cereal in the region was wheat (more than 107'000 hectares); this represented 0.4 percent of the total wheat grown in the region. Other important organic arable crops in North America were green fodder, with over 337'000 hectares, oilseeds, with almost 135'000 hectares, and fresh vegetables and dry pulses, with over 81'000 hectares each.

The main organic permanent crops were grapes (over 27'000 hectares) and temperate fruits (over 18'000 hectares).

Producers

In 2020, over 22'000 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 6'000 organic producers. Since 2004, when there were over 11'000 organic producers, the number has almost doubled.

[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] Jan Trávníček, Czech Organics, Staré Město, Czech Republic, www.czechorganics.com

Wild collection

In 2020, over 283'000 hectares of wild collection areas (organic blueberries) were reported, most of it in Canada.

Market

In 2020, the organic market continued to grow in North America, reaching over 53.7 billion euros. Since 2019, Canada's organic market has grown by 26.1 percent, and the organic market of the United States has grown by 12.8 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 148 euros per capita on organic products in 2020, while in Canada, the per capita consumption was 112 euros. For 2020, Canada reported an organic share of the total retail sales of 3.3 percent, and in the United States, an organic share of 6.0 percent was noted.

For more information about the North American figures, see data tables, page 284.

Organic Agriculture in North America: Graphs

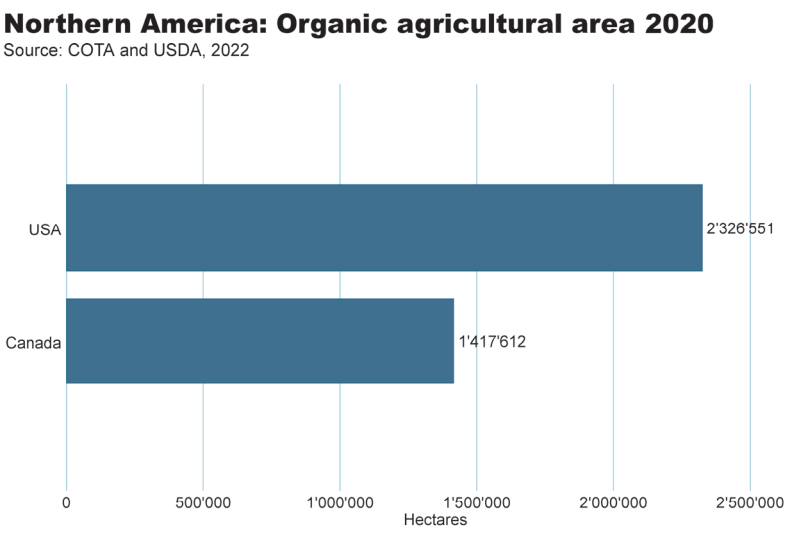


Figure 95: North America: Organic agricultural land in Canada and the United States 2020

Source: Canada Organic Trade Association and United States Department of Agriculture

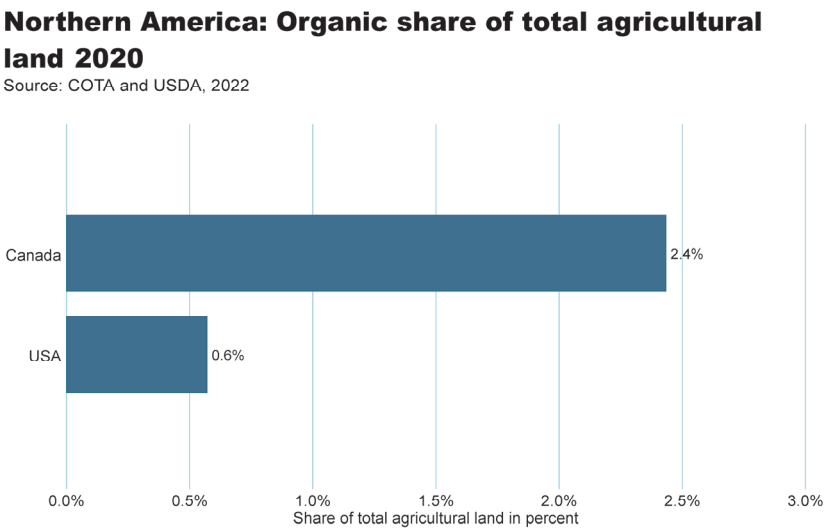


Figure 96: North America: Organic share of total agricultural land in Canada and the United States 2020

Source: Canada Organic Trade Association and United States Department of Agriculture

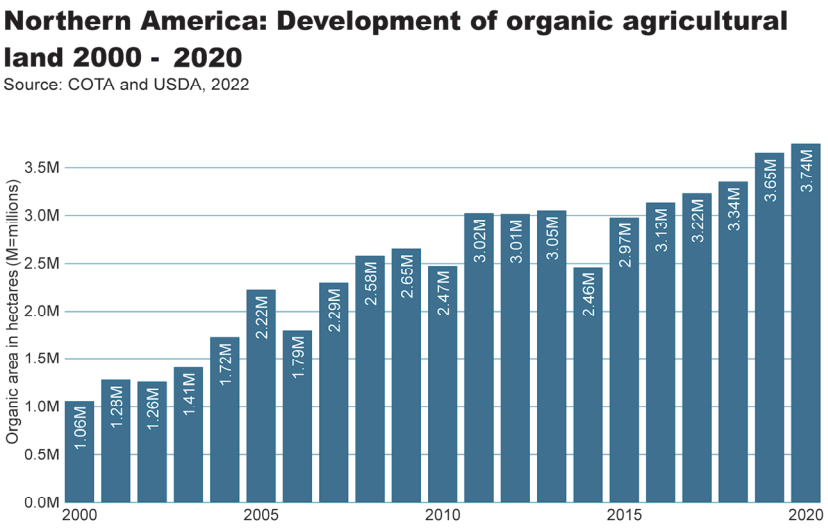


Figure 97: North America: Development of organic agricultural land 2000-2020

Source: Canada Organic Trade Association and United States Department of Agriculture

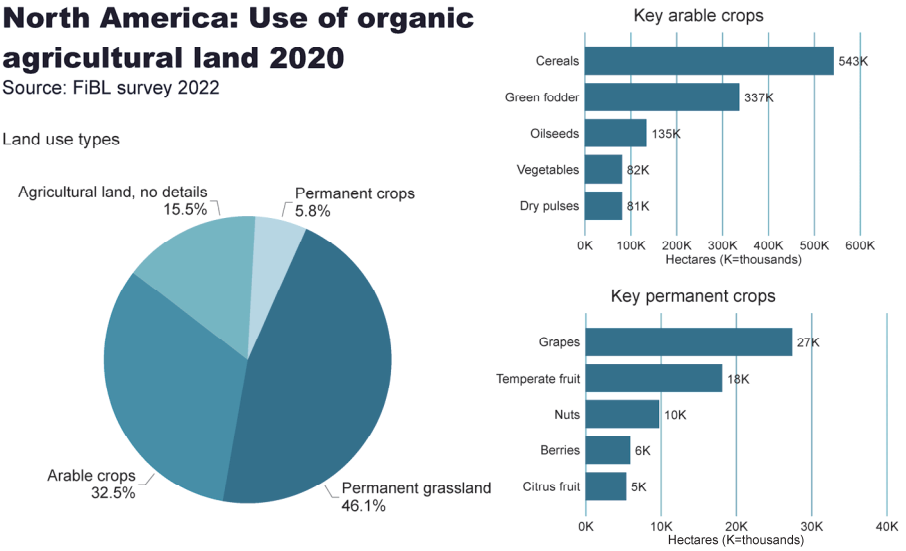


Figure 98: North America: Land use in organic agriculture 2020

Source: Canada Organic Trade Association and United States Department of Agriculture

Organic Agriculture in North America: Tables

Table 76: North America: Organic agricultural land, organic share of total agricultural land, and number of producers 2020

Country	Area [ha]	Share of total agri. land [%]	Producer [no.]
Bermuda		Processing	
Canada	1'417'612	2.4%	5'972
United States of America (2019)	2'326'551	0.6%	16'476
Total	**3'744'163**	**0.8%**	**22'448**

Source: Canada Organic Trade Association and United States Department of Agriculture; FiBL survey 2022

Table 77: North America: All organic areas 2020

Country	Agricul-ture [ha]	Forest [ha]	Wild collection [ha]	Total [ha]
Bermuda		Processing		
Canada	1'417'612		289'369	1'706'981
United States of America (2019)	2'326'551	205'196	596	2'532'342
Total	**3'744'163**	**205'196**	**289'965**	**4'239'323**

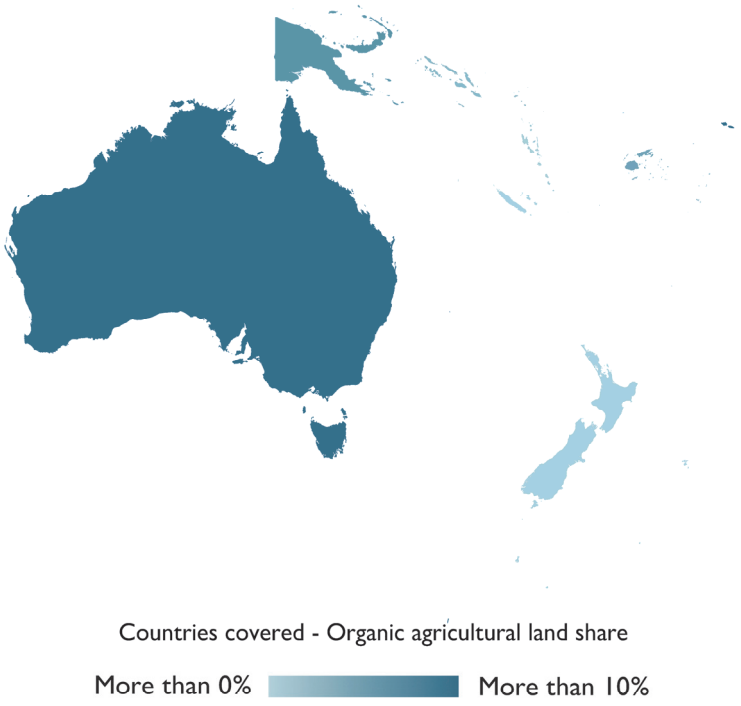
Source: Canada Organic Trade Association and United States Department of Agriculture; FiBL survey 2022

Table 78: North America: Land use in organic agriculture 2020

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		581'488
Arable land crops	Cereals	542'879
	Dry pulses	81'432
	Flowers and ornamental plants	30
	Fresh vegetables and melons	81'542
	Medicinal and aromatic plants	1'453
	Mushrooms and truffles	236
	Oilseeds	134'704
	Plants harvested green	337'245
	Root crops	13'256
	Seeds and seedlings	59
	Strawberries	2'160
	Textile crops	16'601
	Arable crops, other	6'847
Arable land crops Total		1'218'444
Permanent crops	Berries	5'949
	Citrus fruit	5'403
	Coffee	115
	Fruit of temperate climate zones	18'130
	Fruit, tropical and subtropical	5'122
	Fruit/nuts/berries	1'958
	Grapes	27'444
	Nurseries	77
	Nuts	9'772
	Olives	628
	Permanent crops, other	143'011
Permanent crops Total		217'608
Permanent grassland		1'726'622
Total		**3'744'163**

Source: Canada Organic Trade Association and United States Department of Agriculture; FiBL survey 2022

Oceania



Map 7: Organic agricultural land in the countries of Oceania 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers and governments.

Australia

NICOLE FORD[1]

Introduction[2]

The Australian certified organic industry continues to expand and prosper despite the enormous challenges faced over the past two years. Through drought, bushfires, floods and most recently, the global pandemic, the Australian organic industry is unwavering.

According to IBISWorld's "Organic Farming in Australia 2020" report published in November 2020, the Australian organic industry (retail was estimated to be worth over 2 billion Australian dollars in 2020 (domestic and export markets; Reeves, 2020). This is three percent of Australia's gross agricultural production value (67 billion Australian dollars in 2021, ABARES, 2021).

The number of organic operators in Australia has grown steadily since the 1990s. National gross revenue from sales of organic products has also grown, increasing at around 8 percent per .annum compounding from 2016 to 2021 (Reeves, 2020). There are now 4'233 organic operations in Australia, displaying steady long-term growth of 38 percent since 2011.

Organic producers

The estimated total number of certified organic operations in Australia in 2020 was 1'748, a decrease of four percent since 2018. This decrease is likely due to the overall impacts of recent climatic and economic events but is relatively small and may recover over time.

Organic producers can be found in all states and territories. At 25 percent, Victoria holds the largest total number of organic producers with 439 producers located in the state in 2020, while 424 Producers are in New South Wales (representing 24 percent of the total), and 418 are located in Queensland (at just under 24 percent of the total number). There are 201 producers in South Australia and 164 producers in Western Australia, representing 11 and 9 percent of the total number. The Australian Capital Territory represents the smallest total percentage at less than one percent with just two producers in 2020, closely followed by the Northern Territory with 27 producers or two percent, and Tasmania with 73 producers or around four percent.

The category with the largest number of organic producers in 2020 was beef with 49 percent of the total producers, shortly followed by fruit at 23 percent. This is a shift from 2018, where livestock fodder represented 24 percent of the total number of organic producers across the country and reflects the change in demand for organic livestock fodder over the past two years.

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[1] Nicole Ford, Chief Executive Officer, Australian Organic Ltd. Nundah, Australia, www.austorganic.com

[2] This chapter is based on the Australian Organic Market Report 2021, published by Australian Organic. It is available at https://austorganic.com/industry/publications/market-report-2021.

Australia: Distribution of organic producers by state and territory 2020

Source: Australian Organic 2021

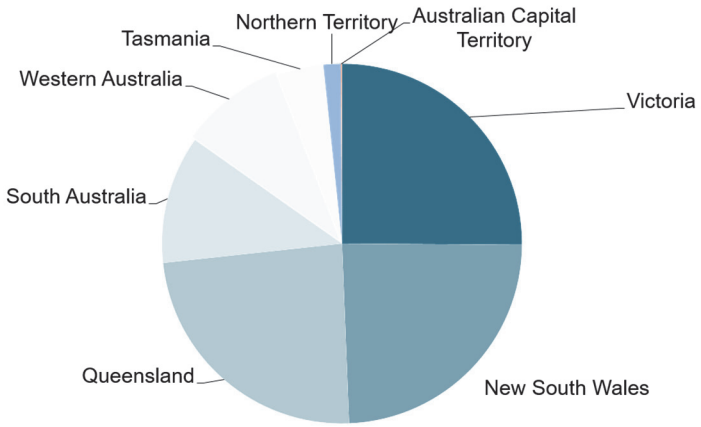


Figure 99: Australia: Distribution of organic producers

Source: Australian Organic Limited 2021. Note: this figure is based on the limited dataset from 2020

Area of organic land

Australia remains the country with the largest land area under certified organic management.

Australia: Distribution of organic farmland by state and territory 2020

Source: Australian Organic 2021

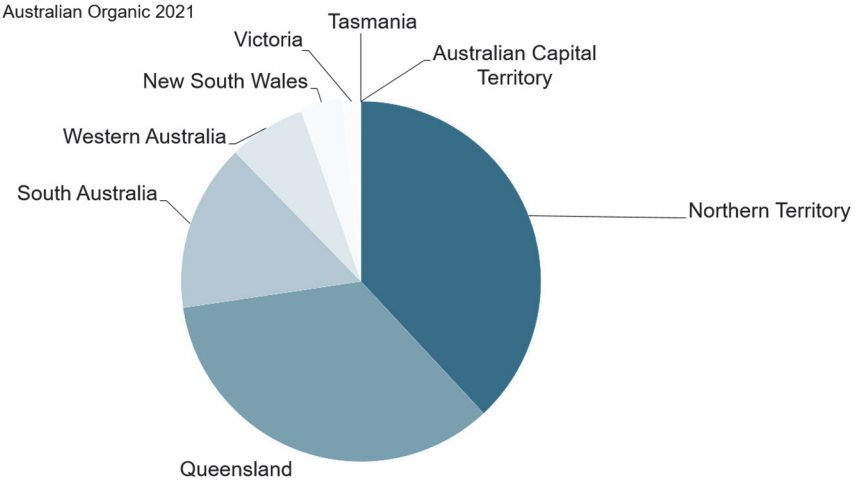


Figure 100: Australia: Distribution of organic farmland

Source: Australian Organic Limited 2021. Note: this figure is based on the limited dataset from 2020

Based on the data provided by Government-approved certifiers ACO Certification Limited and AUSQUAL, the total land area under certified organic management (including in-conversion and fully certified organic) in Australia is conservatively estimated at 23.6 million hectares (ha) in 2020. **Note: this figure is likely to be an underestimate due to the limited dataset and should not be compared to 2018 data.** [1]

Within Australia, the Northern Territory is estimated to hold the largest total area of land under certified organic production, at around nine million hectares, followed by Queensland at around eight million hectares and South Australia at around 3.5 million hectares.

Australian organic export market

Despite the impacts of the pandemic on global trade, Australian organic exporters continued to successfully reach 62 international markets during 2020. The United States of America remains Australia's number one trading nation, accounting for 33 percent of total export quantity in 2020. New Zealand and Singapore advanced to second and third place, respectively, while China, Japan and Sweden continue to represent key markets for Australian organic exports.

North America, Asia, and Oceania are the top three regions according to total export quantity. The UK, the European Union and the Middle East are growing as key export destinations for Australian organic products.

Processed foods now account for the largest percentage of Australian organic exports, with 29 percent of the total quantity, followed by meat at 21 percent and non-alcoholic beverages at 19 percent in 2020. Grain products and wine remain in the top five with 12 percent and 10 percent, respectively, while fresh produce has increased to five percent of total exports in 2020.

Value of the organic market in Australia

Despite the current regulatory barriers, economic fluctuations and changing climatic conditions being experienced in Australia, the Australian organic market is delivering 7.9 percent market growth per annum (Reeves, 2020).

While experiencing growth year on year, Australia lags behind mature international markets such as the USA and the European Union. Australia is in an ideal position to optimise its reputation for high quality, value-add agriculture through strengthened consumer confidence while realising domestic and international market opportunities.

Domestic demand for organically farmed products continues. The IBISWorld's "Organic Farming in Australia 2020" Report estimates organic farming demand to be worth 2'354 million Australian dollars (1'422 million euros) in the domestic market alone and is forecast to nearly double to over 4'642 million Australian dollars by 2025 (Reeves, 2020). This steep trajectory in domestic demand growth is expected to be

[1] Editors' note: Other than the number provided by ACO previously (Australia Organic Market report), this number is based on the data from less certifiers. For the statistics sections in this report, we continue to use the previous figure as it is more complete.

replicated across organic farming revenue, which is tipped to double from 1'974 million to 3'911 million Australian dollars during the same period. In conjunction with this growth is an increase in employment and wages, estimated to increase by 48 percent and 73 percent, respectively.

The organic industry in Australia is a positive contributor to GDP and is forecasted to more than double by 2025-26 (Reeves, 2020). The industry contributes to the overall economy through employment, sustainable agricultural practices and producing products that supply increasing consumer preferences.

Strategic Fit Post COVID-Times

When the full implications of the COVID-19 pandemic became apparent, all food and agricultural product value chains had to make decisions about new business models and new ways of doing business within a matter of weeks.

The larger supermarket chains were deemed by governments as essential services. They were able to continue business as usual, but they still had to adjust what they were able to offer as delays and shortages became apparent. Many small and local food and agricultural product businesses had to either shut down or drastically alter which and how they offered goods and services to consumers.

Consumers' spending habits changed dramatically, and there was a worldwide shift towards health-conscious products and services and sustainable products and services. In interviews with post-farmgate organic operators, some small businesses were content to keep to current volumes but to invest in quality as a way of protecting or expanding their margins. Other larger businesses saw strong growth in their segments in the order of 10 to 20 percent per year. Premiums for organic products at the farm gate were consistently 30 to 50 percent and up to 100 percent higher for some product segments, even in a season with sufficient supply.

These shifts in market conditions created both opportunities and challenges for the businesses involved in these markets. The evidence shows us what happened in 2020, but these disruptions in market conditions continued throughout 2021, as we have already seen in some regions and states of Australia and potentially beyond.

The Australian COVID-19-disrupted economy of 2020, with uncertainties and short-term falls in household incomes, saw increased retail sales volumes and increased prices for organic foodstuffs in domestic markets. The Australian sector also saw innovation in online sales. The Australian experience mirrored the international situation where the value of organic food sales from three million producers in 187 countries worldwide increased during the COVID-19 pandemic (Willer et al., 2021).

Consumer demand

In 2020 there was a seismic shift in world economies brought about by the COVID-19 pandemic and government responses to the health crisis. Households and businesses were placed into lockdown, schools and universities shut their doors, travel was restricted, and borders were closed.

The overall outcome was that consumer preferences changed over this period and food value chains faced the imperative of responding to these changes.

Australian organic customers are growing steadily in numbers and commitment. Increasing awareness of environmental and animal welfare issues and, most recently, health concerns, allied to growing familiarity with online purchasing of food products, have increased the awareness and favourable inclinations towards organic foodstuffs.

According to 2021 Australian Organic Market Report consumer research, 56 percent of all Australian shoppers surveyed purchased organic during the previous 12 months. Thirty-seven percent of those shoppers increased their household food allocation to organic.

Organic grocery consumption increased with household penetration up by 3.6 percent, equivalent to 9 million Australian households. Household annual spending grew by 12.8 percent and annual trips by 12.4 percent (trips a consumer takes to the retailer per year). Unsurprisingly with many small to medium-size retail stores closed due to COVID, Australia's major supermarkets and Internet/ home delivery were the only retail type to demonstrate growth.

Australian organic consumers continue to remain a true opportunity, with 56 percent represented demographically "dabbling", committed or devoted, more than half represented as occasionally buying organic products.

There is a well-founded view that the supermarket trade and food manufacturer demand for organic products will continue to grow steadily, though the rate of growth of both sources of demand may run into constraints from scale in supply and the inevitable year-to-year volatility of supply associated with seasonal conditions.

Regulatory framework

Organic certification is required for all Australian-made products labelled "organic" and exported from Australia.

The National Standard for Organic and Bio-Dynamic Produce (referred to as the National Standard or NS for short) provides surety to over 80 countries that the organic products they purchase from Australia adhere to rigorous certification processes.

Six Australian certification bodies are recognised under the National Standard and approved by the Australian Department of Agriculture, Water and the Environment (DAWE), alongside six corresponding certification marks. These are AUS-QUAL, ACO Certification Ltd (ACOCL), Bio-Dynamic Research Institute (BDRI), NASAA Certified Organic (NCO), Organic Food Chain (OFC) and Southern Cross Certified Australia (SXC). These certification bodies are approved to certify products and individual export shipments on behalf of the DAWE

Domestic regulation

The lack of a mandatory domestic standard is also hindering market access for some organic exporters, with businesses forced to pay separate fees for additional certifications specific to each individual export destination. An enforced domestic standard would not only protect Australian consumers but also streamline the

exporting process by providing consistency and equivalence opportunities between Australia and export markets. At the same time, it would prevent Australian exporters from bearing the cost of additional certifications and documentation.

After many years of lobbying Government - and more recently in the past two years led by Australian Organic Ltd (AOL) - in December 2020, David Littleproud of the Minister for Agriculture, Water & the Environment announced a working group, the Organics Industry Advisory Group, would be convened to assess whether the current organic regulatory framework was fit for purpose. Continued work on this matter is underway by government and industry stakeholders.

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Reeves, M. (2020): IBISWorld Organic Farming in Australia: Organic growth: Rising demand for organic produce supports industry revenue and profit

Willer, Helga, Jan Travnicek, Claudia Meier and Bernhard Schlatter (2021): The World of Organic Agriculture. Statistics and Emerging Trends 2021. Research Institute of Organic Agriculture FiBL, Frick, and IFOAM – Organics International, Bonn

The Pacific Islands

KAREN MAPUSUA[1]

Recent developments

The impact of COVID 19, including supply chain disruptions, restrictions on mobility and border closures, has had a substantial impact on organic farmers, supply chains and certification across the Pacific Islands. Audit and inspections have been severely impacted, as few countries have nationally based inspectors; they fly in from neighbouring regions of Australia, New Zealand or South East Asia and even the United States. While some licensees have been able to undertake virtual audits, it has meant that no new farms or licensees have been able to take up certification. However, governments continue to engage in creating a supportive policy environment, and the demand for certification continues. Regional and national agencies and development partners increasingly recognise the value of organic agriculture as a development tool for the Pacific Islands context.

The Pacific Organic and Ethical Trade Community (POETCom) surveyed organic producers to assess the impact of COVID19 on their production and livelihoods, which found that farmers were having difficulty accessing markets. Village-level income sources are being lost due to increasing unemployment among community members, especially in Fiji. Inter-island supply chain logistics have been significantly affected during lockdown periods, and some farmers were unable to access inputs. Domestic sales have dropped dramatically due to the lack of tourists, while regional and international sales have diminished due to border closures. Respondents also noted that accreditors insist on continued surveillance even though auditors cannot travel. The leading causes of farmers' inability to access their farms were travel restrictions (including inter-island travel), lockdowns, and government recommendations to stay at home. However, there has been an increase in demand for organic-approved products as people are now more attuned to the importance of agriculture and are turning to gardening (at least for home consumption).

Market, trade and certification

As most of the organically certified products from the Pacific are for export, the pandemic has forced producers to seek to expand local market opportunities. This development gave impetus to the trend of previous years of growing local markets through basket (box) schemes, unverified organic claims on labels, PGS development, organic stalls at farmers' markets, and increased awareness.

The following is a summary table listing the main products currently organically certified in the Pacific.

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[1] Karen Mapusua, Director Land Resources Division, Pacific Community (SPC) and President of IFOAM - Organics International, Suva, Fiji

Table 79: Pacific Islands: Main products with organic certification

Products	Countries
Vanilla, turmeric, 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

As yet, there are no mechanisms for collecting local organic market data, but growth can be inferred from the growth 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 Pacific Islands, and in some cases, traditional governance systems have been embraced to support the guarantee system. Processing and value-adding operations are also certified through the PGS process, and this has created a need to provide considerable upskilling to those PGS who include processing to manage the more complex inspection requirements.

In 2020, eleven PGS were approved to use the Organic Pasifika Mark, and five additional PGS are under development. The number and variety of PGS certified products on local markets and for export is expanding, and 2020 saw the range grow to include organic manioc flour, peanuts and coffee from Vanuatu, and also saw PGS being utilised to support complementary initiatives such as reforestation efforts. The growth of PGS and improved recognition of the value of organics has also contributed to a rise in farmers' markets and supply agreements. Samoa, Niue, Cook Islands and Fiji now have certified produce sold through farmer's markets. The Republic of the Marshall Islands has small amounts of certified fresh produce available in selected supermarkets. Fiji also 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). These markets all suffered varying degrees of disruption due to local travel and health restrictions but have maintained momentum and picked up again once restrictions were eased.

Third-party organic certification suffered a greater impact due to the unavailability of inspectors at the national level. This fact, combined with supply chain disruptions, tight border closures for almost two years and associated loss of markets, has resulted in some licensees losing certification and others unable to undergo first inspections to start the certification process. As POETCom has an experienced inspector on staff, selected

certification bodies have contracted him to undertake inspections through POETCom. However, this has been available in Fiji only due to regional travel restrictions and was limited within Fiji due to domestic travel bans and closures. The result is likely to be reflected in a drop in licensees that will be reflected in next year's certification data.

Legislation

New Caledonia and French Polynesia remain the only territories to have regulated organics. Independent countries of the region have not yet passed organic regulations. The government of Vanuatu has endorsed its first national organic policy, and the government of Fiji is now consulting on a draft policy developed by the organic sector in the country and presented to the government – a unique bottom-up approach to policy development. Palau and Samoa are also in the initial stages of developing organic policies.

Government and international (development) support

As a regional intergovernmental organisation, the Pacific Community continues to provide support for organics development and houses the POETCom secretariat. POETCom remains predominantly funded through development projects.

POETCom national affiliates continue to receive assistance from international NGOs and bilateral development assistance. In a few cases, national governments provide financial support for organic certification costs, as in the case of 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 livelihood development is demonstrated through the "Building Prosperity for Women Producers through Organic Value Chains" project launched in 2018. It is a four-year project implemented in partnership with the Pacific Community (SPC), the Pacific Organic & Ethical Trade Community (POETCom) and the Australian Department of Foreign Affairs and Trade (DFAT) through the "Pacific Women Shaping Pacific Development" programme (Pacific Women). Pacific Women recognised the potential for organic value chains and mechanisms such as Participatory Guarantee Systems (PGS) to economically and socially empower women. It collaborated with POETCom to design the project that will 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 has the objective to strengthen the sustainability, climate change adaptation and autonomy of key sectors. It also aims to enhance ecosystem services by protecting water resources and biodiversity. Agroecology and organic agriculture form the basis of the agriculture component of the programme.

Outlook

A review is ongoing into POETCom's structure with the aim to 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 more interested in funding programmes of this nature.

There are opportunities as pacific economies plan for a post-COVID green recovery. The local market for organic products is expected to continue expansion, as tourism and hospitality industries look towards organic and sustainability as part of the Pacific Islands brand.

Links/Further reading

Pacific Organic and Ethical Trade Community www.organicpasifika.com
POETCom COVID-19 Survey report COVID19 Survey
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[1], Bernhard Schlatter[2] and Jan Trávníček[3]

In 2020, the organic agricultural land in Oceania was over 35.9 million hectares (most of which is located in Australia), and this constituted 9.7 percent of the total agricultural area in the region. Almost 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 2019 and 2020, the area in Oceania increased by over 35′000 hectares. 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 2020, 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 (almost 55'000 hectares). Of the over 147'000 hectares of organic permanent crops, the largest share was used for coffee (over 68'000 hectares) and coconuts (over 48'000 hectares). Organic permanent crops played an important role in the region. For coconuts, the organic share in the region was 10.3 percent. In 2020, 16.4 percent of the world's organic coconuts area was in Oceania. Organic arable crops were grown on over 51'000 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 almost 16'000 organic producers in the region, with the largest number of producers in Papua New Guinea (over 10'000 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 2020, the total organic market was almost 1.6 billion euros for the region. Australia reported an organic market of 1.4 billion euros and New Zealand a retail sales value of 172 million euros. For the other countries in the region, no data is available. The annual organic consumption was 55 euros per person in Australia and 33 euros per person in New Zealand. For more information, see the data tables on page 308.

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[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] Jan Trávníček, Czech Organics, Staré Město, Czech Republic, www.czechorganics.com

Organic Agriculture in Oceania: Graphs

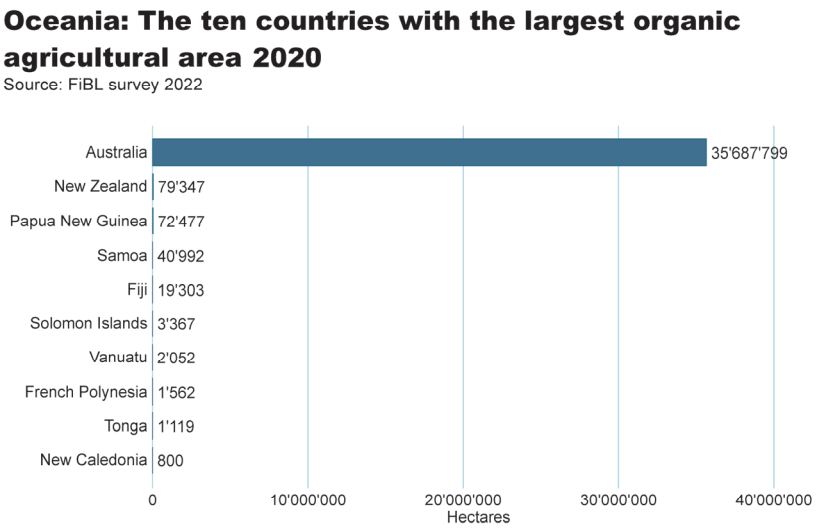


Figure 101: Oceania: Organic agricultural land by country 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

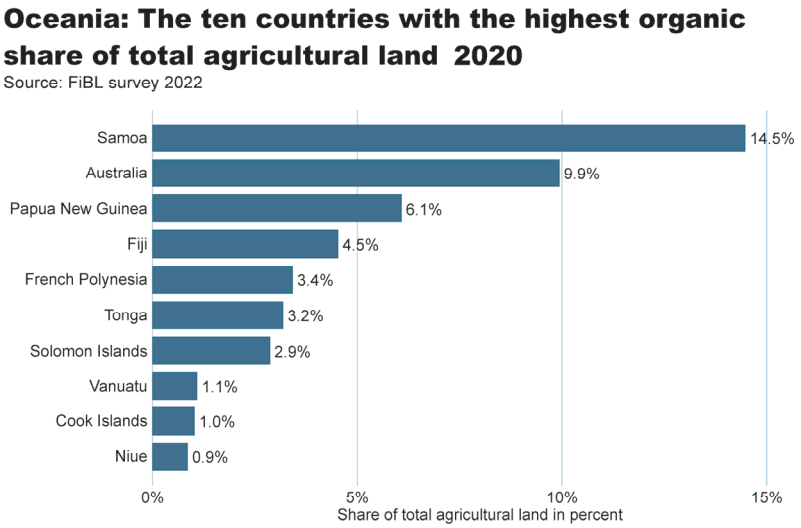


Figure 102: Oceania: Organic share of total agricultural land by country 2020

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

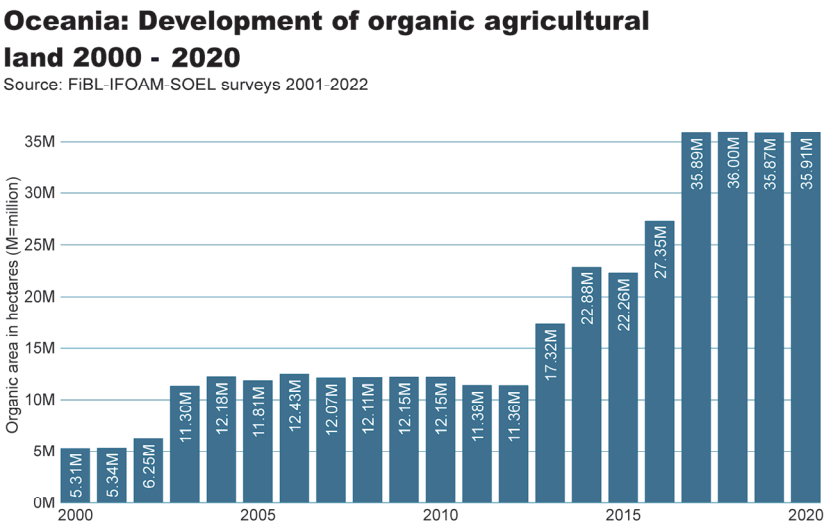


Figure 103: Oceania: Development of organic agricultural land 2000-2020

Source: FiBL-IFOAM-SOEL 2001-2021; based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

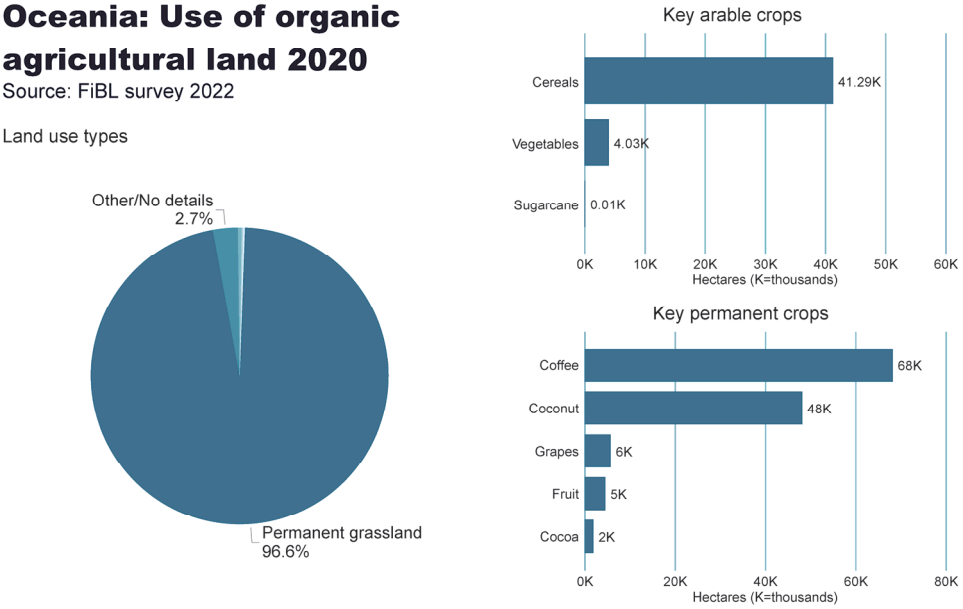


Figure 104: Oceania: Use of agricultural organic land 2020

Source: Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Organic Agriculture in Oceania: Tables

Table 80: Oceania: Organic agricultural land, organic share of total agricultural land, and number of producers 2020

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	19'303	4.5%	204
French Polynesia	1'562	3.4%	22
New Caledonia	800	0.4%	
New Zealand	79'347	0.8%	685
Niue	43	0.9%	
Papua New Guinea	72'477	6.1%	10'159
Samoa	40'992	14.5%	1'919
Solomon Islands	3'367	2.9%	898
Tonga	1'119	3.2%	81
Vanuatu	2'052	1.1%	75
Total	**35'908'876**	**9.7%**	**15'930**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Table 81: Oceania: Land use in organic agriculture 2020

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		61'515
Arable land crops	Cereals	41'293
	Fresh vegetables and melons	4'035
	Sugarcane	7
	Arable crops, no details	6'052
Arable land crops Total		51'386
Other agricultural land		976'456
Permanent crops	Cocoa	1'935
	Coconut	48'226
	Coffee	68'238
	Fruit	4'567
	Fruit, tropical and subtropical	76
	Grapes	5'783
	Medicinal and aromatic plants, permanent	171
	Permanent crops, other	18'374
Permanent crops Total		147'370
Permanent grassland		34'672'149
Total		**35'908'876**

Source: FiBL survey 2022, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 322

Retrospective and Outlook

Retrospective and Outlook – Transformation is Happening!

LOUISE LUTTIKHOLT[1]

The past years have shown the need for sustainable food systems that can withstand and bounce back from shocks, adapt to the impacts of the climate crisis, and respond to disruptions in a way that ensures access to sufficient, sustainable and healthy food for all.

Our vulnerabilities are, now more than ever, clear for all to see. The global pandemic acted like a stress test on our food and farming systems, which were already struggling to nourish the world within planetary boundaries.

In last year's edition of "The World of Organic Agriculture", I concluded the outlook with my wish to be able to gather together at the Organic World Congress in Rennes, France, in September 2021. We could not have known at the time that the pandemic would continue and prevent most of us from participating in person. However, with our event being held mostly online, with excellent plenary speakers, and sessions filled with vivid discussions, the Congress still came at the right time, ahead of other milestone events around the world. Let me go through them, one at a time.

The UN Food Systems Summit

Despite the controversial process of the summit, IFOAM – Organics International decided to engage formally with the United Nations' Food Systems Summit (UNFSS) with a view to mainstream agroecology and organic agriculture across the process (see contribution about the UNFSS on page 178). We brought in plausible arguments to the scientific group committee, made sure that agroecology and organic agriculture were not seen as just another "game-changing solution", and clarified through our policy work that we, instead, need a game-changing paradigm. As a result of this work, together with our like-minded partners, ambassadors, farmer groups and members, we managed to bring to life a coalition on agroecology and regenerative agriculture. We continue to work with partners to make sure that policies supporting agroecology and organic are seen as progressive and pioneering tools which can thrive in a coherent policy environment. At the summit on September 23, the UN Secretary-General clearly stated that "our food systems hold the power to realize our shared vision for a better world." Indeed, this is exactly what motivates us in the organic sector: to keep on pioneering, reaching out to new players, and bringing this better world closer, one step at a time.

[1] Louise Luttikholt, executive Director of IFOAM – Organics International, Charles-de-Gaulle-Str. 5, 53113 Bonn, Germany, www.ifoam.bio

The Climate Change Conference in Glasgow

Just before the United Nations Climate Change conference[1] in Glasgow, research by Greenpeace, the Institute for Agriculture and Trade Policy (IATP)[2] and GRAIN[3] showed that synthetic nitrogen fertilisers are a major driver of the climate crisis, responsible for 1 out of every 40 tonnes of greenhouse gases currently pumped into the atmosphere. It found that synthetic nitrogen fertilisers generated 1'250 million tonnes of CO_2 in 2018, accounting for nearly a quarter of all direct emissions from agriculture.

From the 2019 report from the German Thünen Institute (Sanders and Hess, 2019), we know that organic agriculture actually brings positive effects: organically maintained soils store carbon!

The Koronivia Joint Work on Agriculture (KJWA) of the United Nations Framework Convention on Climate Change (UNFCC) — which covers a range of interrelated topics such as soil, livestock, nutrient and water management, food security, and socioeconomic impacts of climate change across agriculture — recognised these findings. On November 5, 2021, negotiations concluded with an agreement on the need for a transition towards sustainable and climate-resilient food systems. These important conclusions were brought into the United Nations Climate Change Conference, which took place later that month.

The Organic World Congress

On September 6-10, more than 1'500 participants gathered during the first-ever hybrid Organic World Congress. High-level decision-makers like the European Union's (EU) Agriculture Commissioner Janus Wojciechowski and FAO Deputy Director Beth Bechdol recognised the important contributions made by organic and agroecological agriculture towards reaching the Sustainable Development Goals. With its clear target of 20% organic area by 2030, the EU has set an excellent example for the rest of the world. Johan Rockström, Director of the Postdam Institute for Climate Change, clearly stated the importance of the organic sector: "In the future, there can only be one form of agriculture, and that is organic; all other practices do undermine any future possibility to do agriculture at all." His strong words came with a hopeful scientific find: there is enough for all to have a healthy diet if we produce sustainably, reduce food waste and reduce meat intake. In fact, a diet fitting our planetary boundaries is the one recommended by the World Health Organization (WHO) as the optimal diet for all human beings!

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[1] The United Nations Climate Change Conferences are yearly conferences held in the framework of the United Nations Framework Convention on Climate Change (UNFCCC). They serve as the formal meeting of the UNFCCC parties (Conference of the Parties, COP) to assess progress in dealing with climate change.
[2] More information about the Institute for Agriculture and Trade Policy (IATP) is available on www.iatp.org.
[3] GRAIN is a small international non-profit organisation that works to support small farmers and social movements in their struggles for community-controlled and biodiversity-based food systems. More information is available on https://grain.org.

In 2022, we will build on these achievements on both a global and regional level, supporting policy decision-makers as well as farmer groups and media multipliers to do the right thing. This important work will herald the Year of Organics, as 2022 will see IFOAM – Organics International turn 50, the International Organic Accreditation Services (IOAS) 25[1], IFOAM Organics Europe[2] 20, and IFOAM Organics Asia[3] 10 years old. We look forward to celebrating these joyful events with you and the whole organic movement and will use the opportunity to invite even more partners to join us. Together, we are part of the solution!

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United Nations (2021) Secretary-General's Chair Summary and Statement of Action on the UN Food Systems Summit. The United Nations' website. Available at https://www.un.org/en/food-systems-summit/news/making-food-systems-work-people-planet-and-prosperity

[1] Information about the International Organic Accreditation Services (IOAS) is available on https://ioas.org/.
[2] The website of IFOAM Organics Europe is available on https://www.organicseurope.bio/
[3] Information IFOAM Organics Asia can be found on https://asia.ifoam.bio.

Annex: Key Indicators by Country and Region

As a new addition to our tables on the key indicators, we have included the combined exports to the European Union and the United States in metric tons (MT). Please note that for the U.S., not all exports are covered, only select products. Please also bear in mind that there are further export destinations, so the data shown here is not complete. For the countries of the European Union, only the exports to the USA are listed. There are no data on intra-EU trade. See also chapter in this book on EU organic imports (page 146).

Table 82: Key indicators by region 2020

Region	Organic area [ha]	Shares of the global organic farmland area [%]	Organic share of total farmland area [%]	Growth 2019-2020 [%]	Organic producers [no.]	Organic retail sales [Million €]	Export to EU and USA combined by destination [MT]
Africa*	2'086'859	2.8%	0.2%	7.7%	833'986	16	448'513
Asia	6'146'235	8.2%	0.4%	7.6%	1'809'628	12'540	762'737
Europe	17'098'134	22.8%	3.4%	3.7%	417'977	52'000	722'846
Latin America	9'949'461	13.3%	1.4%	19.9%	270'472	778	2'557'101
Northern America	3'744'163	5.0%	0.8%	2.6%	22'448	53'717	145'679
Oceania	35'908'876	47.9%	9.7%	0.1%	15'930	1'594	29'343
World**	**74'926'006**	**100%**	**1.6%**	**+4.1**	**3'369'417**	**120'647**	**4'666'220**

*Source: FiBL survey 2022. 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 83: Key indicators by country 2020

Country/Territory	Organic area [ha]	Organic share [%]	Organic producers [no.]*	Organic retail sales [Million €]	Export to EU and USA combined [MT]
Afghanistan	98	0.0003%			0.03
Albania	887	0.1%	130		1'834
Algeria	772	0.002%	64		2'156
Andorra	2	0.01%			
Angola		0%			5
Argentina	4'453'639	3.0%	1'343		315'218
Armenia	566	0.03%	29		149
Australia	35'687'799	9.9%	1'829	1'422	1'949
Austria	679'872	26.5%	24'480	2'265	435
Azerbaijan	38'080	0.8%	446	3	1'553
Bahamas	49	0.3%	1		
Bangladesh	504	0.01%			129
Belarus	6'838	0.1%	21		1'536
Belgium	99'075	7.2%	2'494	892	25
Belize	454	0.3%	374		13
Benin	38'822	1.0%	6'467		8'890
Bhutan	4'095	0.8%	1'265	0	

Country/Territory	Organic area [ha]	Organic share [%]	Organic producers [no.]*	Organic retail sales [Million €]	Export to EU and USA combined [MT]
Bolivia (Plurinational State of)	179'425	0.5%	14'161		29'034
Bosnia and Herzegovina	1'692	0.1%	86	0	1'582
Botswana		0%			
Brazil	1'319'454	0.6%	24'975	778	205'140
British Virgin Islands	26	0.4%			
Brunei Darussalam		0%	Processing		19
Bulgaria	116'253	2.3%	5'942	33	21
Burkina Faso	66'175	0.5%	27'346		16'631
Burundi	319	0.02%	959		63
Cambodia	35'879	0.6%	8'893		10'195
Cameroon	345	0.004%	499		183
Canada	1'417'612	2.4%	5'972	4'261	130'202
Cape Verde	3	0.003%	223		
Chad		0%	Processing		322
Channel Islands	180	2.0%			
Chile	156'819	1.0%	2'200		58'091
China	2'435'000	0.5%	13'318	10'218	232'800
Colombia	50'533	0.1%	3'160		239'649
Comoros	1'004	0.8%	767		23
Congo, Republic of					6
Cook Islands	15	1.0%	58		
Costa Rica	11'465	0.6%	47		20'050
Côte d'Ivoire	79'125	0.4%	2'880		35'475
Croatia	108'610	7.2%	5'153	99	28
Cuba	2'129	0.03%	8		1'214
Cyprus	5'918	4.4%	1'223		2
Czech Republic	539'532	15.3%	4'669	204	
Democratic Republic of the Congo	118'254	0.4%	72'327		11'813
Denmark	299'998	11.4%	4'186	2'240	0.1
Djibouti		0%			19
Dominica		0%			1
Dominican Republic	117'312	4.8%	15'563		255'097
Ecuador	41'537	0.8%	13'711		563'244
Egypt	116'000	3.0%	970		51'295
El Salvador	2'569	0.2%	375		353
Estonia	220'796	22.4%	2'050	62	8'069
Eswatini	1'156	0.1%	2		11
Ethiopia	234'648	0.6%	219'566	13	15'972
Falkland Islands (Malvinas)	31'937	2.8%	3		
Faroe Islands	251	8.4%			
Fiji	19'303	4.5%	204		37
Finland	315'112	13.9%	5'102	409	
France	2'548'677	8.8%	53'255	12'699	12'857
French Guiana (France)	3'690	11.3%	98		
French Polynesia	1'562	3.4%	22		93
Georgia	1'572	0.1%	1'076		646
Germany	1'702'240	10.2%	35'396	14'990	340
Ghana	74'874	0.5%	3'912		19'730
Greece	534'629	10.1%	29'869	66	2'195
Grenada	84	1.1%	23		

Country/Territory	Organic area [ha]	Organic share [%]	Organic producers [no.]*	Organic retail sales [Million €]	Export to EU and USA combined [MT]
Guadeloupe (France)	858	1.7%	181		
Guatemala	87'028	2.3%	5'366		10'970
Guinea		0%			16
Guinea-Bissau	9'844	1.2%			379
Guyana		0%	Processing		495
Haiti	2'907	0.2%	4'632		1'809
Honduras	66'179	2.0%	15'046		58'492
Hungary	301'430	6.0%	5'128	30	0.4
Iceland	4'709	0.3%	27		
India	2'657'889	1.5%	1'599'010	186	248'065
Indonesia	75'793	0.1%	17'836		15'638
Iran (Islamic Republic of)	11'916	0.03%			1'873
Iraq	63	0.001%			
Ireland	73'952	1.6%	1'725	189	3
Israel	6'287	1.0%	344		23'870
Italy	2'095'380	16.0%	71'590	3'872	32'230
Jamaica	10	0.002%			2
Japan	11'992	0.3%	3'678	1'419	4'094
Jordan	1'446	0.1%	23		4
Kazakhstan	114'886	0.1%	294		40'892
Kenya	123'744	0.4%	42'335	3	9'569
Kosovo	1'604	0.4%	66		407
Kuwait	33	0.02%			
Kyrgyzstan	30'259	0.3%	1'144		632
Lao People's Democratic Republic	3'266	0.1%	871		14'961
Latvia	291'150	14.8%	4'171	51	
Lebanon	1'715	0.3%	122		51
Lesotho		0%			489
Liechtenstein	1'490	41.6%	46		
Lithuania	235'471	8.0%	2'417	51	
Luxembourg	6'118	4.6%	114	171	1
Madagascar	103'817	0.3%	54'376		6'796
Malawi	232	0.004%	21		3'548
Malaysia	1'276	0.01%	30		123
Maldives					518
Mali	14'675	0.04%	11'004		3'768
Malta	67	0.6%	25		1
Martinique (France)	683	2.2%	107		
Mauritius	5	0.01%	20		3'356
Mayotte	87	0.4%	12		
Mexico	215'634	0.2%	45'954		365'534
Moldova	27'624	1.2%	196		23'926
Monaco			Processing		
Mongolia	241	0.0002%	314	1	
Montenegro	4'823	1.9%	423		56
Morocco	11'452	0.04%	423		18'850
Mozambique	14'438	0.03%	394		4'209
Myanmar	10'143	0.1%	68		50
Namibia		0%	9		102
Nepal	9'361	0.2%	983		152

Country/Territory	Organic area [ha]	Organic share [%]	Organic producers [no.]*	Organic retail sales [Million €]	Export to EU and USA combined [MT]
Netherlands	71'607	3.9%	1'937	1'361	2'875
New Caledonia	800	0.4%			0.2
New Zealand	79'347	0.8%	685	172	24'872
Nicaragua	39'076	0.8%	8'511		11'123
Niger		0%			580
Nigeria	54'995	0.1%	316		448
Niue	43	0.9%			
North Macedonia	3'727	0.3%	863		361
Norway	45'312	4.6%	1'981	442	
Oman	4	0.0003%			
Pakistan	69'850	0.2%	934		45'682
Palestine	5'218	1.1%	1'515		881
Panama	5'929	0.3%	18		4'139
Papua New Guinea	72'477	6.1%	10'159		2'238
Paraguay	73'428	0.3%	5'850		79'670
Peru	342'701	1.5%	107'367		333'984
Philippines	191'770	1.5%	11'906		26'117
Poland	507'637	3.5%	18'598	314	12
Portugal	319'540	8.1%	5'945	21	4'943
Puerto Rico			Processing		
Republic of Korea	38'540	2.3%	23'750	391	102
Réunion (France)	1'901	4.0%	402		
Romania	468'887	3.5%	9'647	41	43'023
Russian Federation	615'188	0.3%	48	183	117'162
Rwanda	5'188	0.3%	8'368		791
Saint Lucia		0%			
Saint Pierre and Miquelon		0%			2
Samoa	40'992	14.5%	1'919		97
San Marino			Processing		
Sao Tome and Principe	9'103	20.7%	3'565		2'970
Saudi Arabia	26'632	0.02%	312	296	223
Senegal	3'809	0.04%	18'373		2'400
Serbia	19'317	0.6%	439		15'847
Seychelles	0	0%			7
Sierra Leone	219'861	5.6%	5'505		18'381
Singapore	15	2.2%		16	541
Slovakia	222'896	11.7%	716		
Slovenia	52'078	10.8%	3'685	49	3
Solomon Islands	3'367	2.9%	898		31
Somalia		0%			32
South Africa	40'954	0.04%	220		28'132
Spain	2'437'891	10.0%	44'493	2'528	16'937
Sri Lanka	73'393	2.6%	1'990		37'303
Sudan		0%			4'611
Suriname	52	0.1%			85
Sweden	613'964	20.4%	5'489	2'193	16
Switzerland	177'347	17.0%	7'561	3'602	19
Syrian Arab Republic		0%			1
Taiwan	10'789	1.4%	4'117		63
Tajikistan	11'818	0.2%	166		
Tanzania, United Republic of	198'226	0.5%	148'607		3'952

Country/Territory	Organic area [ha]	Organic share [%]	Organic producers [no.]*	Organic retail sales [Million €]	Export to EU and USA combined [MT]
Thailand	160'802	0.7%	96'673	12	39'673
Timor-Leste	32'311	8.5%	3		331
Togo	127'782	3.3%	47'271		65'093
Tonga	1'119	3.2%	81		
Trinidad and Tobago			Processing		
Tunisia	297'137	3.0%	6'525		83'049
Turkey	382'639	1.0%	52'590	46	161'818
Uganda	116'376	0.8%	139'191		24'108
Ukraine	462'225	1.1%	419	38	273'854
United Arab Emirates	5'419	1.4%	152		377
United Kingdom	473'500	2.7%	3'581	2'859	429
United States of America	2'326'551	0.6%	16'476	49'456	15'475
United States Virgin Islands			Processing		
Uruguay	2'742'368	19.6%	1'388		3'691
Uzbekistan	3'781	0.01%	26		918
Vanuatu	2'052	1.1%	75		24
Venezuela (Bolivarian Republic of)	1'490	0.01%	7		
Viet Nam	63'536	0.5%	17'174		14'109
Yemen		0%			0.2
Zambia	691	0.003%	10'100		48
Zimbabwe	1'043	0.01%	963		236
World	**74'926'006**	**1.6%**	**3'369'417**	**120'647**	**4'666'220**

Source: FiBL survey 2022, based on data from governments, the private sector, and certifiers. For retail sales data: FiBL-AMI- survey 2022, based on data from government bodies, the private sector and market research companies. Export data: Traces/European Commission and USDA. For detailed data sources, see annex, page 322
**Total number includes data for countries with less than three producers.*

Annex: Data Providers and Data Sources

In this chapter, we provide the data sources for our survey on organic worldwide. If not otherwise stated, the data is from 2020.

Afghanistan

Source

› Area, operators: Certifier data.
› Export (MT): European Commission/Traces, USDA

Albania

Source

› Area, operators: Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat, Istituto Agronomico Mediterraneo di Bari (CHEAM Bari), Bari, Italy
› Export (MT) to EU and USA: European Commission/Traces, USDA

Algeria

Source

› Area and operators: Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat, Istituto Agronomico Mediterraneo di Bari (CHEAM Bari), Bari, Italy. The data is from 2017.
› Export (MT): European Commission/Traces

Andorra

Source

› Ecocert Iberica, Sevilla, Spain. The data is from 2019.

Angola

› Area and operators: Certifier data were not received.
› Export (MT): European Commission/Traces

Argentina

Source

› Area, operator, production, export, retail sales (MT) data: provided by SENASA, www.senasa.gov.ar
› Export (MT) to EU and USA: European Commission/Traces, USDA

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

› Area, operators: Survey of Ecoglobe - Organic control and certification body, Yerevan, Republic of Armenia, www.ecoglobe.am
› Export (MT) to EU: European Commission/Traces

Contact

› Nune Darbinyan and Eliza Petrosyan, Ecoglobe - Organic control and certification body, Yerevan, Republic of Armenia, www.ecoglobe.am

Australia

Source

› Area, operators (from 2018): 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]
› Retail sales: Australian Organic
› Export (MT) to EU and USA: European Commission/Traces, USDA

Note

› See also the article about organic farming in Australia in this and in previous editions of "The World of Organic Agriculture."

Contact

› Niki Ford, Australian Organic, Nundah, Australia

[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

Austria

Sources

› Area, land use and operators: Bundesministerium für Nachhaltigkeit und Tourismus, Vienna, Austria
› Retail sales: RollAMA based on GfK, AMA-Marketing, Agrarmarkt Austria Marketing GesmbH, Vienna, Austria
› Import data (MT): 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

› Area, operators: Experimental and Resource Center affiliated to the Azerbaijan Botanic Center, Ganja, Azerbaijan, www.etkt.az.
› Retail sales (from 2011): see above
› Export (MT) to EU: European Commission/Traces

Contact

› Dr Vugar Babayev, Ganja Agribusiness Association (GABA), Ganja, Azerbaijan, www.etkt.az.

Bahamas

› Certifier data.

Bangladesh

Source

› Certifier data
› Please note that due to the multiple and changing data sources, a direct year-to-year comparison is not possible for Bangladesh.
› Export (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Dr. Shaikh Tanveer Hossain, IFOAM Asia
› Dr Khurshid Alam, BARI, Bangladesh

Belarus

Source

› Area, operators: Center for Environmental Solutions (CES), 220029 Minsk, Belarus
› Export (MT) to EU: European Commission/Traces

Contact

› Lyubomyr Klepach, Center for Environmental Solutions (CES), 220029 Minsk, Belarus

Note

Please note that the data source has changed and that a direct year-to-year comparison is not possible.

Belgium

Sources

› Area and operator data (2019): Landbouw en Visserij, Brussels, Belgium
› Total organic farmland 2020: Biowallonie, Namur, Belgium
› Livestock data (2019): 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.
› Export (MT) to EU: European Commission/Traces

Benin

Sources

Area, operators
› 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
Export (MT) to EU and USA: European Commission/Traces, USDA

Bermuda

› No data were received for Bermuda

Bhutan

Source

› Area, operators: Ministry of Agriculture (MOA), National Organic Programme DOA, Thimphu, Bhutan, www.moa.gov.bt
› Export (MT) to EU and USA: European Commission/Traces, USDA

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.

Note

› In 2019 data, the data source 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 the 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

› Area, producers (2019): Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy
› Export (MT) to EU and USA: European Commission/Traces, USDA
› Retail sales (2017): Organska Kontrola, Sarajevo, Bosnia and Herzegovina

Botswana

› Area (wild collection), producers: Certifier data

Brazil

Sources

› Area and operator data: Ministério da Agricultura, Pecuária e Abastecimento/Ministry of Agriculture, Livestock and Food (MAPA). Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina. To this data, the area and operator data of two international certifiers as well data from the Textile Exchange (https://textileexchange.org/)were added by FiBL. The data of these certifiers are currently not registered under the system of the MAPA. For MAPA data, see
› Table 84, page 341.
› Export (MT) to EU and USA: European Commission/Traces, USDA
› Total export value and retail sales data: Organic Brazil (2016 data)

Note

› 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; hence, for the crops, not the total organic farmland is covered.

Contact

› Virgínia Mendes Cipriano Lira, Ministério da Agricultura, Pecuária e Abastecimento (DTEC/SDA/MAPA), Coordenadora de Produção Orgânica, Brasilia, Brazil

British Virgin Island

Source

› Area, operators: Certifier data.
› Export (MT): European Commission/Traces, USDA

Brunei Darussalam

› For Brunei Darussalam, no area or operator data was provided for 2019. Updates should be sent to helga.willer@fibl.org
› Export (MT) to EU: European Commission/Traces

Bulgaria

Sources

› Land area, operators (2019), livestock (2019): Eurostat database organic farming, Eurostat, Luxembourg
› Retail sales: Boshnakova, Mila (2021): Organic Market Annual Report Bulgaria: GAIN Report Number BU2021-0008, USDA, February 2021: Foreign Agricultural Service, Washington
› Import data: European Commission/Traces

Contact

› Dr. Stoilko Apostolov, FOA Bioselena, Karlovo, Bulgaria. www.bioselena.com

Burkina Faso

Sources

Area, operators
› CERTISYS, Bruxelles, Belgium, www.certisys.eu
› Ecocert West Africa, Ouagadougou, Burkina Faso (2019 data)
› LACON GmbH, Offenburg, Germany (2017 data)
› Export (MT) to EU:, European Commission/Traces

Burundi

Source

› Area, operators: Ecocert East Africa, Antananarivo, Madagascar

› Export (MT) to EU and USA: European Commission/Traces, USDA

Cambodia

Source

› Area/operators: Certifier data.
› Export (MT) to EU and USA: European Commission/Traces, USDA

Cameroon

Source

› Ecocert West Africa, Ouagadougou, Burkina Faso, www.ecocert.com. Producer data are from 2017.
› Export (MT) to EU: European Commission/Traces

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

› Tia Loftsgard and Diana Zeidan, 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

Area, producers: Certifier data

Chad

› Area (wild collection): Certifier data.
› Export (MT) to EU: European Commission/Traces

Channel Islands

Source

› Area: FAOSTAT (2019) Organic area data Channel Islands. The FAOSTAT website, FAOSTAT, Rome, Italy, FAOSTAT > Agri-Environmental Indicators> Inputs.

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
› Export (MT) to EU and USA: European Commission/Traces, USDA

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/retail sales and export data; Chinese Agricultural University, Beijing, China
› For the cotton area, data from the Textile Exchange (https://textileexchange.org/)were used.
› Export (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Yuhui Qiao, Chinese Agricultural University, Beijing, China
› Zejiang Zhou, President, Board of IFOAM Asia, China

Colombia

Source

› Area data 2020: from Federación Orgánicos de Colombia. Data was provided via Tomas Enrique Leon Sicard, National University of Colombia, Bogotá. Area data for tropical fruit, cacao, and citrus fruit was taken from two international certifiers.
› Production and operators data 2020: from five international certifiers.
› Export (MT) to EU and USA: European Commission/Traces, USDA

Note

› Area and operator data before 2019: Ministry of Agriculture and Rural Development (Ministerio de Agricultura y Desarrollo Rural), Bogotá, Colombia

Contact

› Tomas Enrique Leon Sicard, National University of Colombia, Bogotá, Colombia.
› Carlos Escobar, ECONEXOS - Desarrollo en Movimiento, Cali, Colombia, www.econexos.com.

Note

› The data from Federación de Orgánicos de Colombia is based on estimates.

Comoros

Source

› Area and operators: Ecocert East Africa, Antananarivo, Madagascar
› Export (MT) to EU: European Commission/Traces

Congo, Republic of

› No area or producer data were received
› Export (MT) to the USA: USDA

Congo, Democratic Republic of

› Area and producers: Certifier data.
› Export (MT) to EU and USA: European Commission/Traces, USDA

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

› Area and operator data 2020: Servicio Fitosanitario del Estado (SFE), M.A.G. Costa Rica, San José. Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina
› Export (MT) to EU and USA: European Commission/Traces, USDA

Côte d'Ivoire

Sources

The data were compiled by FiBL based on the data of the following international certifiers:
› CERTISYS, Bruxelles, Belgium
› Control Union, Zwolle, The Netherlands, www.controlunion.org
› Ecocert West Africa, Ouagadougou, Burkina Faso, www.ecocert.com
Export (MT) to EU and USA: European Commission/Traces, USDA

Croatia

Sources

› Area and operators: Eurostat database organic farming, Eurostat, Luxembourg
› Market (from 2014) & export data (from 2011): Darko Znaor, Independent Consultant, 10000 Zagreb, Croatia
› Import data (MT): European Commission/Traces

Contact

› Darko Znaor, Independent Consultant, 10000 Zagreb, Croatia

Cuba

› Area and operators: Certifier data (2019)
› Export (MT) to EU and USA: European Commission/Traces, USDA

Cyprus

Source

› Land area and producer 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 (M): European Commission/Traces
› Export (MT) to the USA: USDA

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 2019.
› Import data (MT): 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 (2020), import and export value (2019)(euros): Statistics Denmark
› Import data (MT): European Commission/Traces

Contact

› Ejvind Pedersen, Danish Agriculture & Food Council, Agro Food Park 13, 8200 Aarhus N, Denmark
› Martin Lundoe, Statistics Denmark, Copenhagen, www.statbank.dk

Djibouti

› Area/OPERATORS: No data were reported

› Export (MT) to the USA: USDA

Dominica

Source

› Area and operators: As no updates were received (the latest data were from 2011), the data were removed from the database and not continued.
› However, the European Commission/Traces reported that 1 MT of dried fruit was imported from Dominica to the Netherlands.
› As for this country only export data are available (European Commission/Traces). information on area and producers should be sent to helga.willer@fibl.org

Dominican Republic

Source

› Area, operators, and production 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
› Export (MT) to EU and USA: European Commission/Traces, USDA

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 (total in MT and euros): Agrocalidad, Quito, Ecuador, www.agrocalidad.gob.ec Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina
› Retail sales and export value data from 2017.
› Export (MT) to EU and USA: European Commission/Traces, USDA

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
› Export (MT) to EU and USA: European Commission/Traces, USDA

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 Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina
› Export (MT) to EU and USA: European Commission/Traces, USDA

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

Equatorial Guinea

› Wild collection/operators: Certifier data
› For this country, only export data are available (European Commission/Traces). Information on area and producers should be sent to helga.willer@fibl.org

Estonia

Sources

› Land area, land use, operators: Eurostat database, Eurostat, Luxembourg
› Retail sales data: Estonian Institute of Economic Research, Estonia (2019 data) After the editorial deadline of this edition, we received the 2020 retail sales data for Estonia: The total organic market value was 76.5 million euros; the market grew by 24% in 2020; the organic share of the total market was 4.3%, and the per capita consumption was 57 euros in 2020.
› Export data (euros): Estonian Ministry of Agriculture
› Export (MT) to the USA: USDA
› Import (MT): 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

Eswatini

› Area and operators: Certifier data
› Export (MT) to EU: European Commission/Traces

Ethiopia

Sources

Area and operator data

› Ceres, Happburg, Germany, www.ceres-cert.com (2018 data)
› Control Union, Zwolle, The Netherlands
› Ecocert South Africa, Stellenbosch, South Africa
› Letis, Santa Fe, Argentina,
› Onecert, Mansarovar, Jaipur, India, www.onecert.com
› Textile Exchange, London, UK (for Cotton data)

Export (MT) to EU and USA: European Commission/Traces, USDA

Producers

› While in the past, we used the number of producers provided by the Ethiopian Institute of Agricultural Research, for this survey, we used the data of the international certifies and Textile Exchange, not all of which might include individual smallholders.

Note

For Ethiopia, no new data have been received from the national data source since 2015. Therefore, data from international certifiers and the Textile Exchange 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

Source

› Area and operator data: Pacific Organic and Ethical Trade Community (POETCom), Suva, Fiji, www.spc.int
› Export (MT) to EU: European Commission/Traces

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

› Heidi Haavisto-Meier, 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 and import values: 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

› Area and operators: Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int.
› Export (MT) to EU: European Commission/Traces

Contact

› Karen Mapusua, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

Gambia

The certifier, who had provided data in the previous years, did not report activities anymore. No imports from Gambia into the European Union were reported.

Georgia

Source

› Area and operators: Elkana Survey, Elkana, 16 Gazapkhuli Street, 0177 Tbilisi, Georgia, www.elkana.org.ge. The data is from 2015.
› Export (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Elene Shatberashvili, Biological Farming Association Elkana, 16 Gazapkhuli street, 0177 Tbilisi, Georgia, www.elkana.org.ge

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.
› CERTISYS, Brussels, www.certisys.eu
› Control Union, Zwolle, The Netherlands, www.controlunion.org
› Ecocert, African Offices
Export (MT) to EU: European Commission/Traces

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

Area and operators: 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. Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina
› Operators: Certifier data
› Export (MT) to EU and USA: European Commission/Traces, USDA

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

› Operators: Certifier data. No data on the area were provided.
› Export (MT) to EU and USA: European Commission/Traces, USDA

Guinea Bissau

› Area and operators: Certifier data
› Export (MT) to EU: European Commission/Traces

Guyana

Source

› Area: Wild collection: Certifier data
› Export (MT) to EU: European Commission/Traces

Haiti

Sources

› Area and operators: Certifier data
› Export (MT) to EU and USA: European Commission/Traces, USDA

Honduras

Source

› Area, operators, and production data from Agricultura Orgánica Honduras, Secretaria de Agricultura y Ganadería, Tegucigalpa, Honduras, SENASA Honduras. Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina
› Export (MT) to EU and USA: European Commission/Traces, USDA

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 (2009/2015): 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. Crop area data were not available from APEDEA; area data for cotton were added from the Textile Exchange.
› Retail sales data (2017): ICCOA- International Competence Centre for Organic Agriculture, Karnataka, India
› Export (MT) to EU and USA: European Commission/Traces, USDA

Note

› In addition to the 3rd party certified area, there were 766'589hectares with PGS certification managed by a total of 1'191'519 farmers organised in 52'709 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

› Area data were compiled from several international certifiers, which meant a change of the data source; furthermore, the historical area data were revised.
› For the producers, the data from the Indonesian Organic Alliance were maintained. Further clarification is needed for Indonesia.
› Export (MT) to EU and USA: European Commission/Traces, USDA

Iran

Source

› Area and operators: 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.
› Export (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Hossein Mahmoudi, Environmental Sciences Research Institute, Shahid Beheshti University ESRI, Tehran, Iran.

Iraq

Source

› Zakho Small Villages Projects (ZSVP), Dohuk City, Dohuk, Iraq. The data is from 2019.

Contact

› Dr Abid Ali Hasan, Zakho Small Villages Projects (ZSVP), Program Coordinator in Iraq, Dohuk City, Dohuk, Iraq

Ireland

Sources

› Area (2019), operators (2017): Eurostat, Luxembourg
› Market data: Bord Bia, Dublin, Ireland.

› Import data (MT): European Commission/Traces

Israel

Source

› Area and operators: Standardisation and Accreditation Department Ministry of Agriculture and Rural Development Plant Protection and Inspection Services (PPIS), Israel, www.ppiseng.moag.gov.il/ppiseng/ISREAL
› Export (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Tal Weil Tzameret, Standardization and Accreditation Department, Ministry of Agriculture and Rural Development, Plant Protection and Inspection Services (PPIS), Israel

Italy

Sources

› Total organic area: SINAB (2021) Bio in Cifre 2020. SINAB, Rome, Italy, www.sinab.it
› Organic area details (2019): Eurostat database, Eurostat, Luxembourg
› Operators: Eurostat database, Eurostat, Luxembourg
› Retail sales: Nomisma, Bologna, Italy
› Export values: Nomisma, Bologna, Italy
› Import data (MT): European Commission/Traces

Contact

› Silvia Zucconi, Nomisma, Bologna, Italy

Jamaica

Source

› No update was received from the previous source, so the data from certifiers were used. A direct year-to-year comparison is therefore not possible.
› Export (MT) to the USA: USDA

Japan

Source

› Area and producer (2018) data: Ministry of Agriculture, Forestry and Fisheries (MAFF), Tokyo, Japan
› Domestic market data (2018): Ministry of Agriculture, Forestry and Fisheries (MAFF), Tokyo, Japan. Data provided by the Italian Embassy in Tokyo at a presentation at SANA 2019, Bologna

Jordan

Source

› Area and operators: Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy. The data is from 2017.
› Export (MT) to EU: European Commission/Traces

Kazakhstan

Sources

Area and operators
› Ekoagros, Kaunas, Lithuania
› Letis, Rosario, Santa Fe, Argentina
› Organic Standard, Kyiv, Ukraine
Export (MT) to EU and USA: European Commission/Traces, USDA

Kenya

Source

› Area and operators: Kenya Organic Movement (KOAN), Nairobi, Kenya, www.koan.co.ke
› Total export value (2016): KOAN
› Export (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Samuel Ndungu, Kenya Organic Movement (KOAN), Nairobi, Kenya, www.koan.co.ke

Korea, Republic of

Source

› Area, operators and retail sales: Korea Institute of Rural Social Affairs, Chungnam Province, Republic of Korea, Republic of Korea
› Export (MT) to EU and USA: European Commission/Traces, USDA

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

› Area and operators: Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy
› Export value (2015): Ministry of Agriculture, Forestry and Rural Development, Pristina, Kosovo
› Export (MT) to EU and USA: European Commission/Traces, USDA

Kuwait

Source

› Ecocert India, Aurangabad, Maharashtra, India, www.ecocert.com

Contact

› Amresh Kumar Pandey, Ecocert India, Aurangabad, Maharashtra, India, www.ecocert.com

Kyrgyzstan

Source

› Area and operators: Agricultural Commodity and Service Cooperative "Bio Farmer", Kyrgyzstan. To this data, the data of three international certifiers as well as data from Textile Exchange about Cotton was added
› Export (MT) to EU: European Commission/Traces

Contact

› Nurbek Kannazarov, Organic Farming Kyrgyzstan

Lao People's Democratic Republic

Source

› Area and operators: As no update was received from the previous source, the data from one international certifier were used.
› Export (MT) to EU and USA: European Commission/Traces, USDA

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

› Area and operators: CCPB Middle East, Beirut, Lebanon
› Export (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Angel Atallah, CCPB Middle East, Beirut, Lebanon

Lesotho

› Area and producers: Certifier data.
› Export (MT) to EU: European Commission/Traces

Liberia

The certifier who had reported data in previous years did not report any activities anymore. No imports to the European Union from Liberia were reported.

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 were calculated by FiBL based on the per capita consumption in Switzerland, assuming the per capita consumption is similar in the two countries.

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

Area and producers: Certifier data. Not all certifiers provided updated data.
› Export (MT) to EU: European Commission/Traces

Malawi

Sources

› Area and operators: Certifier data
› Export (MT) to the USA: USDA

Malaysia

› Area and operators: Certifier data.
› Export (MT) to EU and USA: European Commission/Traces, USDA

Maldives

› Area and operator data were not received.
› Export (MT) to EU: European Commission/Traces

Mali

› Area (2020) and operators (2017): Certifier data.
› Export (MT) to EU: European Commission/Traces

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

› Area (2020) and producers (2019) Ecocert, Antananarivo, Madagascar, www.ecocert.com
› Export (MT) to EU: European Commission/Traces

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

› Area dn operators: 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. Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina
› Export value (2013): University of Chapingo
› Export (MT) to EU and USA: European Commission/Traces, USDA

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 changed since the 2018 data and that a direct year-to-year comparison is not possible with the data prior to 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 with them. The current number of all operations, including smallholders, is not available.

Moldova

Source

› Area and operators: Ministry of Agriculture, Regional Development and Environment of Moldova, Department for Organic Production and Products of Origin, Chişinău, Moldova
› Export (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Marcela Stahil, Ministry of Agriculture, Regional Development and Environment of

Moldova, Department for Organic Production and Products of Origin, Chişinău, Moldova

Mongolia

› Area, operators, retail sales: 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 being revised by the government.

Montenegro

Source

› Area and operators: Ministry of Agriculture and Rural Development, Podgorica, Montenegro
› Market data (from 2010): Ecozept - Market research and marketing consulting agency. Freising, Germany
› Export (MT) to EU: European Commission/Traces

Contact

› Andrijana Rakočević, Advisor for Organic production, Ministry of Agriculture and Rural Development, Podgorica, Montenegro

Morocco

Sources

› Area and operators: Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy
› Wild collection area: AMABIO, Casa Blanca, Morocco, www.amabio.org (2017 data)
› Export (MT) to EU and USA: European Commission/Traces, USDA

Mozambique

Sources

Area and operators
› Control Union, Zwolle, The Netherlands
› Ecocert, South Africa, Stellenbosch, Namibia
Onecert, Onecert, Mansarovar, Jaipur, India, www.onecert.com
Export (MT) to EU: European Commission/Traces

Myanmar

› Area and operators: Certifier data.
› Export (MT) to EU: European Commission/Traces

Namibia

› Area and operators: Certifier data.
› Export (MT) to EU: European Commission/Traces

Nepal

Source

› Area and operators: Maheswar Ghimire, Kathmandu, Nepal. To this data, some crop details and operator data from certifiers were added.
› Export (MT) to EU and USA: European Commission/Traces, USDA

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/.
› Import data (MT): European Commission/Traces

Contact

› Marian Blom, Bionext, Ede, The Netherlands, www.bionext.nl

New Caledonia

Source

› Area and operators: Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int
› Export (MT) to EU: European Commission/Traces

Contact

› Karen Mapusua, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

New Zealand

Source

› Area, operators, retail Sales: Organics Aotearoa New Zealand, Wellington, New Zealand, www.oanz.org.nz, provided by Agribusiness group.
› Export (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Jon Manhire, the AgriBusiness Group, Christchurch, New Zealand, www.agribusinessgroup.com

Nicaragua

Source

› Area and operators: Instituto de Protección y Sanidad Agropecuaria (IPSA), Departamento

de Inspección Certificación Fitosanitaria, Managua, Nicaragua, www.magfor.gob.ni
Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina
› Export (MT) to EU and USA: European Commission/Traces, USDA

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

› Area and operator data were not received.
› Export (MT) to EU: European Commission/Traces

Nigeria

Source

› Area and operators: Certifier data.
› Export (MT) to EU and USA: European Commission/Traces, USDA

Note

› 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

Niue

Source

› Area (2018): 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
› Export (MT) to EU and USA: European Commission/Traces, USDA

Norway

Sources

› Land area (2019) and operator (2020) data: Eurostat database, Eurostat, Luxembourg
› Market data (2019) 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

› Certifier data (2019). Older data that were not confirmed were removed from the database. A direct year-to-year comparison is therefore not possible.

Pakistan

› Area and producers: Certifier data. For the number of the producers, data from the Textile Exchange were added-
› Export (MT) to EU and USA: European Commission/Traces, USDA

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
› Export (MT) to EU and USA: European Commission/Traces, USDA

Panamá

Source

› Area and operators (2018): Ministerio de Desarrollo Agropecuario, Dirección Nacional de Sanidad Vegetal, Panama, www.mida.gob.pa.
› Export (MT) to EU and USA: European Commission/Traces, USDA

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

› Area dnd operators: Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int
› Export (MT) to EU and USA: European Commission/Traces, USDA

Note

› Please note that the coffee area was revised and that it was considerably higher in 2020 than what was reported in previous years.

Contact

› Karen Mapusua, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

Paraguay

Source

› Area dn operators: Servicio Nacional de Calidad y Sanidad Vegetal y de Semillas (SENAVE), Department of Organic Agriculture, Asuncion, Paraguay, www.senave.gov.py Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina
› Grazed non-agricultural land: Certifier data.
› Export (MT) to EU and USA: European Commission/Traces, USDA

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. Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina
› Export (MT) to EU and USA: European Commission/Traces, USDA

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

Area and operators: 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 and Certification for Organic Products Office (CCPB), Ufficio Attività di Controllo e Certificazione Prodotti Biologici, Bologna, www.ccpb.it
› Control Union, Zwolle, The Netherlands, www.controlunion.org;
› Ecocert India, Aurangabad, Maharashtra, India, www.ecocert.com
› Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de

Export (MT) to EU and USA: European Commission/Traces, USDA

Note

› A direct year-to-year comparison over the years is not possible as not all certifiers provide updates every year.

Poland

Source

› Land area and land use (2019) and producers (2020): Eurostat database, Eurostat, Luxembourg
› Retail sales: Biokurier, Bydgoszcz
› Import data (MT): European Commission/Traces

Portugal

Source

› Organic land and operators: Eurostat database, Luxembourg
› Market data (2011): INTERBIO, http://www.interbio.pt
› Import data (MT): European Commission/Traces

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
› Ekoagros, Kaunas, Lithuania
› Ecoglobe - Organic control and certification body, Yerevan, Republic of Armenia, www.ecoglobe.am
› LETIS, Rosario, Santa Fe, Argentina
› Organic Standard, Kyiv, Ukraine
› Organización Internacional Agropecuaria (OIA), Buenos Aires, Argentina (2019 data)

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
Export (MT) to EU and USA: European Commission/Traces, USDA

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 that were not included previously.

Rwanda

› Area and operators: Certifier data.
› Export (MT) to EU and USA: European Commission/Traces, USDA

Saint Lucia

Certifier data

Saint Pierre and Miquelon

› Area and operator data were not received.
› Export (MT) to EU: European Commission/Traces

Samoa

Source

› Area and operators: Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int
› Export (MT) to EU: European Commission/Traces

Contact

› Karen Mapusua, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

San Marino

Certifier data.

Sao Tome and Prince

Source

› Area and operators: Certifier data
› Export (MT) to EU: European Commission/Traces

Saudi Arabia

Source

› Area and operators: Department of Organic Agriculture (DOA), http://moa.gov.sa/organice/portale
› Export (MT) to EU: European Commission/Traces

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

Area and operators:
› Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
› CERTISYS, 1150 Bruxelles, Belgium, www.certisys.eu
› Ecocert, Ouaga, Burkina Faso, www.ecocert.com

Export (MT) to EU: European Commission/Traces

Note

No updated data had been received from the National Federation for Organic Agriculture, Thiès, Sénégal, and their data were removed, with the exception of the number of producers, as the certifiers only provided the number of companies/projects/certificates.

Serbia

Source

› Area and operators: Ministry of Agriculture, Forestry and Water Management, Belgrade, Republic of Serbia and Eurostat database, Eurostat, Luxembourg
› Export (2016) and import value (2012): Ministry of Agriculture, Forestry and Water

› Export (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Jelena Milic, Ministry of Agriculture, Forestry and Water Management, Belgrade, Republic of Serbia

Seychelles

› Area and operators: Certifier data
› Export (MT) to EU: European Commission/Traces

Sierra Leone

› Area and operators: Certifier data.
› Export (MT) to EU and USA: European Commission/Traces, USDA

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

› Area and operators: Certifier data.
› Export (MT) to EU: European Commission/Traces

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

› Area and operators: Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int
› Export (MT) to EU: European Commission/Traces

Contact

› Karen Mapusua, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

Somalia

› Area (wield collection☺ Certifier data.
› Export (MT) to EU: European Commission/Traces

South Africa

Sources

Area and operators
› Control Union, Zwolle, The Netherlands, www.controlunion.org
› Ecocert South Africa, Stellenbosch, South Africa
› Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de

Export (MT) to EU and USA: European Commission/Traces, USDA

Spain

Sources

› Area and land use, operators: Eurostat database, Eurostat,. Luxembourg
› Retail Sales, export and import value: Ministerio de Agricultura, Pesca y Alimentación (2021) Análisis de la caracterización y proyección de la producción ecológica española en 2020. MAPA, Madrid
› Import data (MT): European Commission/Traces

Contact

› Pedro López, Pro-Voc-Association, Madrid, Spain, www.provotec.es

Sri Lanka

Source

Area and operators:
› Control Union, Zwolle, The Netherlands, www.controlunion.org
› Ecocert India, Aurangabad, Maharashtra, India, www.ecocert.com
› MAYACERT, Guatemala City, Guatemala
› NCO, Stirling Australia
› Onecert, Mansarovar, Jaipur, India, www.onecert.com (2019 data)

Export value (from 2015): Lanka Organic Movement

Export (MT) to EU and USA: European Commission/Traces, USDA

Sudan (former)

› Area (wild collection): Certifier data
› Export (MT) to EU: European Commission/Traces

Suriname

› Area: Certifier data
› Export (MT) to EU: European Commission/Traces

Sweden

Sources

› Area, livestock and operators (2019): Eurostat database, Luxembourg
› Market data: Ecoweb Sweden.
› 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: Bio Suisse, Basel, Switzerland, www.biosuisse.ch/de/bioinzahlen.php.

Contact

› Helga Willer, FiBL, Frick, Switzerland

Syria

› Area or operator data were not received-
› Export (MT) to EU: European Commission/Traces

Taiwan

Source

› Area and operators: Agriculture and Food Agency, Council of Agriculture, Executive Yuan, R.O.C. Taiwan. Available at https://info.organic.org.tw/category/english/statistics/
› Export (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Ray Tzeng, Organic Center, National I-lan University, Taiwan

Tajikistan

Area and operators: Certifier data.

Tanzania

Sources

Area
› BioInspecta, Frick Switzerland
› Control Union, Zwolle, The Netherlands
› Ecocert Southern Africa, Stellenbosch, South Africa
› Textile Exchange

Producers (2013): Tanzania Organic Movement (TOAM)
Export (MT) to EU and USA: European Commission/Traces, USDA

Note

› Please note that a direct year-to-year comparison is not possible for Tanzania due to the changing data sources.

Thailand

Source

› Area, producers, retail sales: Green Net Survey among the international and domestic certifiers; Green Net, 10330 Bangkok, Thailand. Domestic market and international trade data are from 2014.
› Export (MT) to EU and USA: European Commission/Traces, USDA

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

› Area and operators: Certifier data.
› Export (MT) to the USA: USDA

Togo

Sources

Area and operators: The data was compiled by FiBL based on the data of the following international certifiers.
› Ceres, Happburg, Germany (2018)
› CERTISYS, Brussels, Belgium, www.certisys.eu
› Ecocert, Ecocert West Africa, Ouagadougou, Burkina Faso, www.ecocert.com
› Export (MT) to EU and USA: European Commission/Traces, USDA

Tonga

Source

› Area and operators (2019): 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

› Area and operators : Direction Générale de L'Agriculture Biologique (DGAB), Tunis, Tunisia
› Export (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Samia Maamer Belkhiria, Direction Générale de L'Agriculture Biologique (DGAB), Ministry of Agriculture and Hydraulic Resources, Tunis, Tunisia

Turkey

Source

› Area and operators: Ministry of Agriculture and Forestry, Ankara, Turkey, and Eurostat database, Eurostat, Luxembourg
› Wild collection area (2017): Ministry of Agriculture and Forestry, Ankara,
› Market data (2014): USDA Foreign Agricultural Services (2016): Turkish Organic Market Overview. USDA, Washington, USA.
› Export and import values (2017): Ministry of Agriculture and Forestry, Ankara, Turkey
› Export (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Elif Bayraktar Öktem, Republic of Turkey Ministry of Agriculture and Forestry, Ankara, Turkey

Uganda

Sources

Area and operators:
› Ceres, Happburg, Germany (2018)
› Control Union, Zwolle, The Netherlands (2019)
› Ecocert Southern Africa, Stellenbosch, South Africa
› Onecert, Mansarovar, Jaipur, India, www.onecert.com (2019)
› Textile Exchange: https://textileexchange.org
Export (MT) to EU and USA: European Commission/Traces, USDA

Note

As no update had been received from the national data source, data from international certifiers were used. A direct-year-to year comparison is therefore not possible.

Ukraine

Sources

› Area and operator data: Ministry for Development of Economy, Trade and Agriculture of Ukraine, Kyiv, Ukraine
› Crop data: The data from the Ministry, which provided data on 4 major crops (grain maise, soybeans, sunflower, wheat), were supplemented with crop data from several international certifiers.
› Export data: Organic.Info, Kyiv, Ukraine, https://organicinfo.ua/en/about-us/
› Domestic market: Organic Federation of Ukraine (OFU), Kyiv, Ukraine, www.organic.com.ua. According to the Ministry, the domestic market excluding imported products was 25 million euros.
› Export (MT) to EU and USA: European Commission/Traces, USDA
› Wild collection data: Organic Federation of Ukraine (OFU), Kyiv, Ukraine, www.organic.com.ua/ Certifier data

Infographics

› Infographics with data are available at https://organicinfo.ua/en/infographics/

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

› Area and operators: Ministry of Environment and Water (MOEW), United Arab Emirates.
› Export (MT) to the USA: USDA

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.
› Export data (2016): Soil Association.

Contacts

› Lee Holdstock, Soil Association, Bristol, UK

United States of America

Source

› Land area and producers (2019): United States Department of Agriculture, Washington, USA.
› Market data: Organic Trade Association (OTA), Washington D.C., USA

› Export and import data: GATS, USDA, Washington, USA
› Export (MT) to EU: European Commission/Traces

Contact

› Barbara Haumann, OTA, Brattleboro VT 05301, www.ota.com

Uruguay

› Area and operators: Certifier data
› Export (MT) to EU and USA: European Commission/Traces, USDA

Uzbekistan

› Area and operators: Certifier data and Textile Exchange, https://textileexchange.org/
› Export (MT) to EU: European Commission/Traces

Vanuatu

Source

› Area and operators: Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int
› Export (MT) to EU: European Commission/Traces

Note

The big drop in 2019 is probably due to the impact of COVID-19.

Contact

› Karen Mapusua, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

Venezuela

Area and operators: Certifier data.

Viet Nam

Sources

› Area and operators: Vietnam Organic Agriculture Association, Hanoi, Vietnam.
› Export (MT) to EU and USA: European Commission/Traces, USDA
› Export value: USDA
› Import value (2018) Vietnam Organic Agriculture Association

Note

› Please note that for the area and operator numbers, some PGS figures were included.

Contact

› Huong Dang, Vietnam Organic Agriculture Association, Hanoi, Vietnam

Yemen

› No area or operator data was received.
› Export (MT) to the USA: USDA

Zambia

Source

› Area and operators: Ecocert South Africa, Stellenbosch, South Africa
› Export (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Daniël Kotzé, Ecocert South Africa, Stellenbosch, South Africa

Zimbabwe

Source

› Area and operators: Ecocert South Africa, Stellenbosch, South Africa
› Export (MT) to EU: European Commission/Traces

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 84: 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	2020
Production units	5'406	8'064	11'063	10'064	13'232	13'482	15'590	20'050	22'064	25'227	29'000
Producers			5'934	6'719	10'194	11'478	14'222	17'451	17'473	19'978	22'966
Area (million hectares)			1.554*	0.603	0.749	0.940	1.094	0.654	0.719	0.822	0.945

Source: Ministério da Agricultura, Pecuária e Abastecimento
** Includes wild collection area*

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The 23rd 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, policy support, Participatory Guarantee Systems (PGS) 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.

The latest data are presented annually at BIOFACH in Nuremberg, Germany. In 2023, BIOFACH will be held from 14 – 17 February.

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