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THE WORLD OF ORGANIC AGRICULTURE

STATISTICS & EMERGING TRENDS 2024

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LATIN AMERICA AND CARIBBEAN 9.5 MILLION HA

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NORTH AMERICA 3.6 MILLION HA

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The World of Organic Agriculture Statistics and Emerging Trends 2024

Edited by

Helga Willer, Jan Trávníček and Bernhard Schlatter

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Cover picture: Drought and heavy rainfall are a challenge for Naturgut Katzhof in the canton of Lucerne, Switzerland. That's why the owners of this Demeter farm with a community garden are implementing keyline design with agroforestry. Photo: Thomas Alföldi, Research Institute of Organic Agriculture FiBL, Frick, Switzerland

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Glossary

€/person: Per capita consumption in euros
 AfrONet: African Organic Network
 AMI: Agrarmarkt-Informationsgesellschaft - Agricultural Market Information Company, Germany
 AU/AUC: African Union /African Union Commission
 CAP: Common Agricultural Policy of the European Union
 CAADP: Comprehensive Africa Agriculture Development Programme
 CIAO: Comisión Interamericana de Agricultura Orgánica/ Inter-American Commission for Organic Agriculture
 CIHEAM: Centre international de hautes études agronomiques méditerranéennes/ International Centre for Advanced Mediterranean Agronomic Studies
 COTA: Canada Organic Trade Association
 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: Ecological Organic Agriculture
 EOA-I: Ecological Organic Agriculture Initiative for Africa
 EU: European Union
 EU27: Member countries of the European Union from 2020 onward
 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
 GATS: Global Agricultural Trade System of the Foreign Agricultural Service (FAS) of the United States Department of Agriculture (USDA)
 GIZ: Deutsche Gesellschaft für Internationale Zusammenarbeit/German Agency for International Cooperation
 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
 IFOAM – Organics International: Formerly International Federation of Organic Agriculture Movements (IFOAM)
 MOAN: Mediterranean Organic Agriculture Network hosted by CIHEAM Bari, Italy
 MT: Metric tons
 NOARA: Network of Organic Agriculture Researchers in Africa
 OTA: Organic Trade Association, United States of America
 Power BI: Interactive data visualization software product developed by Microsoft for business intelligence
 PGS: Participatory Guarantee Systems
 POETcom: Pacific Organic and Ethical Trade Community
 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
 TRACES: TRAdE Control and Expert System The European Commission's online platform for sanitary and phytosanitary certification required for EU imports
 U.S.: United States
 USDA: United States Department of Agriculture

Foreword from FiBL and IFOAM – Organics International

With this edition, FiBL and IFOAM – Organics International proudly present “The World of Organic Agriculture” for the 25th consecutive time.

Data collection is a primary and ongoing concern for the Research Institute of Organic Agriculture FiBL and IFOAM – Organics International. The extensive data provided over more than two decades in this publication serves as a vital tool for stakeholders, policymakers, authorities, the industry, as well as researchers and extension professionals. It has also proven invaluable for development programs and in supporting strategies for organic agriculture and markets, making it crucial for monitoring the impact of these activities.

The publication also demonstrates our continued commitment to transparency in the organic sector; the method of data collection has evolved over time to reflect the global status of organics as accurately as possible. “The World of Organic Agriculture” has become one of the most frequently cited sources in scientific, technical, and descriptive articles and reports on organic agriculture.

This publication also highlights the role of organic agriculture in overarching sustainability strategies such as the Sustainable Development Goals and the European Union's Farm to Fork Strategy.

Considering that organic agriculture significantly contributes to all of these goals and strategies, this book not only presents data on land area, the number of producers, and market figures but also shows organic agriculture's relevance in addressing climate change, ensuring food and nutrition security, halting biodiversity loss, and promoting sustainable consumption. Thus, it underscores its contribution to the transformation of food systems as a whole. “The World of Organic Agriculture” showcases the potential of organic farming to contribute to a sustainable future.

We extend our gratitude to the Swiss State Secretariat for Economic Affairs (SECO), the Coop Sustainability Fund, and Nürnberg Messe for their support in making this publication possible. We would also like to express our appreciation to all the authors and data providers who have contributed in-depth information and figures related to their respective regions, countries, or fields of expertise. Finally, we wish to thank the editorial team for their dedication and commitment, as well as other members of the FiBL team who have supported activities related to data collection.

Frick and Bonn, February 2024

Dr. Jörn Sanders
Chairman of the Management Board
Research Institute of Organic Agriculture FiBL
Frick, Switzerland

Karen Mapusua
President
IFOAM – Organics International
Bonn, Germany

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 and serves as a resource for sound 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.

This report, focusing on consolidated data from 2022, reveals a significant expansion of organic farmland in many countries, with an unprecedented growth of nearly 20 million hectares. This surge has elevated global organic farmland to over 96 million hectares, representing now 2.0 percent of the world's agricultural land and managed by more than four million producers.

In 2022, organic food sales reached an impressive 135 billion euros. While growth was observed in advanced markets like Canada and the United States, several European countries experienced market stagnation or even decline. These fluctuations underscore how organic markets are influenced by global developments such as energy and inflation crises, as well as the repercussions of the conflict in Ukraine. As we await the data for 2023, we will gain insights into the continued impact of these factors on the organic market.

The Swiss State Secretariat for Economic Affairs (SECO) supports actors in the international organic industry to navigate these and other challenges and seize opportunities for the benefit of all. By facilitating dynamic and easy access to organic market and production data, we thus aim to offer a global public good in support of decision-makers in governmental administrations, the private sector, development agencies, NGOs, and the private sector.

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

Foreword from BIOFACH / VIVANESS

Organic agriculture and the organic food industry provide solutions for the protection and preservation of our planet and a sustainable future for generations to come. To shape our collective future in an ecological and sustainable manner, knowledge and information are essential. For 25 years, the international patron of BIOFACH, IFOAM – Organics International, and the Research Institute of Organic Agriculture, FiBL, have made an invaluable global contribution with their data publication, “The World of Organic Agriculture – Statistics & Emerging Trends.”

The team at BIOFACH, the world's leading trade fair for organic food, warmly congratulates on the 25th anniversary!

For everyone in the sector and the community, “The World of Organic Agriculture” is truly essential reading, offering guidance and setting the course for the future!

We are delighted that IFOAM and FiBL, along with all other partners, present this comprehensive data annually at BIOFACH, the world's leading trade fair for organic food. This includes the opening press conference, their own booth in the exhibition halls, and also during the congress. For many years, the corresponding session has been one of the most visited!

My heartfelt thanks go to our partners, FiBL and IFOAM – Organics International, as well as all the dedicated contributors!

Danila Brunner
Executive Director BIOFACH / VIVANESS
Nürnberg, Germany

Foreword from the Editors

In the 25th edition of “The World of Organic Agriculture,” we present the latest available data on organic agriculture. This edition marks a milestone in the history of worldwide organic agriculture data collection. To commemorate this anniversary, we invited partners to provide testimonials regarding the benefits of this statistical collection, which can be found on the following pages. A find a milestone list showcasing the history of our data collection is available on page 19).

Over the past 25 years, numerous individuals have contributed valuable information and data, with some supporting us from the very beginning. We are profoundly grateful to all our authors, data and information suppliers from around the world, as well as our supporters, including 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, covering topics such as the global market report, policy support, public standards and legislation, Participatory Guarantee Systems, and the European Union's organic import data.

Please note that we have restructured the book by relocating the tables on global organic farming and organic agriculture in the continents to the end of the report.

For this edition, we have further developed Power BI graphics. Most of the figures in this book are now based on Power BI, allowing for swift updates in the future. Additionally, you can explore our interactive Power BI graphics and database at <https://statistics.fibl.org>.

Lastly, we are delighted to announce that the 13th Chinese edition of “The World of Organic Agriculture” will be published by the Organic and Beyond Company.

Helga Willer, Bernhard Schlatter and Jan Trávníček
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For 25 Years: Organic Numbers from Around the World

HELGA WILLER¹

In the year 2000, the statistical yearbook "The World of Organic Agriculture" was published for the first time. Since then, data have presented the data from this collaborative project at the Biofach trade fair.

When the organizers of the Biofach trade fair approached the Germany-based Stiftung Ökologie & Landbau SÖL (Foundation Ecology & Agriculture) in 1999, asking if they were interested in presenting the most important statistics on organic farming annually at Biofach, we could not have imagined that we would still be presenting the latest figures in Nuremberg years later; in 2024, for the 25th time!

Since the inception of data collection in 2000, the global organic area has surged by over 500 percent, reaching 96 million hectares, and the organic market has expanded nearly eightfold, from 15 billion to almost 135 billion euros by 2022. Support for data collection has also grown. In the early days, the activities were carried out Foundation Ecology & Agriculture and supported by the Biofach trade fair. Today, the Research Institute of Organic Agriculture (FiBL Switzerland) collects the data, with support from the Swiss State Secretariat for Economic Affairs, the Swiss Coop Sustainability Fund, IFOAM - Organics International, and NürnbergMesse as the organizer of Biofach. The data collection is also made possible by numerous partners from around the world, some of whom have been providing data for 25 years.

Since 1999, data collection has been continuously expanded and has now become the most important reference work for the development of organic farming. For example, the European Commission uses the data to demonstrate that European consumers value organic products highly. Researchers regularly cite the data in their work. In 2015, FiBL added the survey on the status of voluntary sustainability standards such as Fairtrade or Rainforest Alliance. The results are also published annually on <https://vss.fibl.org>.

Data sources: The majority of data collection is done through personal contacts, and many data can also be obtained via the internet. For example, Eurostat, the statistical office of the European Union, provides data on land area, livestock, production, and farms on its website. For countries that do not publicly provide their data, FiBL sends out questionnaires. If there is no national agency collecting data, FiBL collects the data among international certifiers and compiles it for the respective country. Often, land and production data come from different sources than market, export, and import data. For example, in the USA, data on organically managed land, production, and livestock come from the statistics office of the US Department of Agriculture, while retail trade data is provided by the Organic Trade Association (OTA). Import and export data, on

¹ Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, Frick, Switzerland

the other hand, come from the Foreign Agricultural Service of the Department of Agriculture. Overall, FiBL collaborates with at least 200 different data sources and suppliers.

Data processing and access: In addition to the demanding quality assurance process, a significant challenge is handling the constantly increasing volume of data. Improved access to data through digital tools is another challenge. FiBL provides interactive databases and infographics on its website <https://statistics.fibl.org>, which require continuous development. Efforts are underway to incorporate additional indicators, enhance user-friendliness, and automate production data estimation.

Data publication: The primary medium for disseminating the data is the statistical yearbook "The World of Organic Agriculture," published jointly by FiBL and IFOAM – Organics International and presented annually at Biofach. In this publication, in addition to detailed tables and graphics, reports on the development of organic farming in the continents and topics such as the market and legislation can be found. In addition to the book, the data is also available interactively online. The offering is complemented by popular infographics, which, like other materials, can be accessed via www.organic-world.net.

Milestones

- ›1999: The then organizers of Biofach, Hagen Sunder and Hubert Rottner, asked the Foundation Ecology & Agriculture SÖL to regularly present global organic farming figures at Biofach.
- ›2000: The first edition of the statistical book and the data were presented at Biofach. At that time, they were limited to indicators such as area and farms. Later editions added land use (2006), retail sales (2012), and imports and exports (2020).
- ›2001: The Research Institute of Organic Agriculture (FiBL) becomes a partner.
- ›2008: Funded by the State Secretariat for Economic Affairs of Switzerland (SECO) and the International Trade Centre (ITC), FiBL was able to establish a professional database. This allowed for better collection, storage, processing, and analysis of data. FiBL also launched the website organic-world.net.
- ›2011: The Food and Agriculture Organization of the United Nations (FAO) integrated FiBL's data on land use in organic farming into their FAOSTAT online database.
- ›2012: The EU-funded project OrganicDataNetwork began. Within its framework, data collection and processing methods were improved, and an interactive online database was established. The trading company Organic and Beyond first published the Chinese translation of The World of Organic Agriculture, which has since been regularly released.
- ›2014: The successor project to the SECO-ITC-funded project Global Information System for Organic Market and Production Data includes data collection on voluntary sustainability standards. 2015: The first edition of The State of Sustainable Markets with data on 14 voluntary sustainability standards was published by FiBL, ITC, and the International Institute of Sustainable Development (IISD). The Twitter account FiBLStatistics was created and has been used for publicizing the yearbook since then.
- ›2018: FiBL launched the interactive online database statistics.FiBL.org and presented infographics on global organic farming for the first time.
- ›2019: The 20th edition was co-financed for the first time by the Coop Sustainability Fund.
- ›2020: Data was made available for the first time with interactive infographics using the PowerBI program online at statistics.fibl.org. Most of the graphics in the yearbook are now created with PowerBI.
- ›2023: The Statistical Handbook Organic Agriculture in Africa, which provides in-depth African data, was published.
- ›2024: Presentation of the 25th edition of The World of Organic Agriculture is presented at Biofach.

Celebrating 25 Years of “The World of Organic Agriculture” - Testimonials

In this special 25th edition of "The World of Organic Agriculture," we are commemorating a milestone achievement. To express our deep appreciation for their invaluable support, we have reached out to our esteemed contacts and data providers, inviting them to share testimonials that underscore the profound significance of this yearbook in their professional endeavors. We are sincerely grateful for their contributions, which have played an integral role in shaping the impact and relevance of our publication over the years.

I would like to take this opportunity to express my deep appreciation for the work done on organic statistics. "The World of Organic Agriculture" is one of FiBL's most significant flagship projects, and I take great pride in it.

Dr. Jörn Sanders, Chairman of the FiBL Management Board

The statistics book measures the pulse of the organic sector and it is a key reference point for us when it comes to showcasing the impact and constant development of organic agriculture worldwide.

We use the information collected to provide our members reliable data and support our role in convening inclusive conversations at a global scale, it is an invaluable resource.

Karen Mapusua, President IFOAM – Organics International

25 years - that's really a great date and it's amazing!

For me the global data collection is essential as it provides a lot of insights, allows me to follow trends and stay connected to the farmers.

It also empowers to make informed decisions that can drive organic farming and inspire positive changes.

Tatsiana Astraukh, Ecoidea, Belarus

The Organic Trade Association is honored to have contributed to the World of Organic Agriculture for 25 years. Having access to sound data is critical to the growth and sustainability of the organic sector. Accurate data helps policymakers develop sound national organic strategies.

Growers and producers of organic products, as well as processors, retailers, and the entire organic supply chain, need precise data to make practical production and business decisions. International data sharing benefits the entire organic sector, as well as organic consumers.

Violet Batcha, Director of Marketing & Communications, Organic Trade Association, USA

A sector must know how to analyze, visualize, and represent itself in order to be significant. What would the world of organic farming be like without the data collected, processed, and disseminated under the direction and expertise of FiBL, without the informational network and international relationships of IFOAM – Organics International, without the global fair BIOFACH where they are presented every year and which inspired the first collection in 1999?

Organic Agriculture Worldwide: Key Indicators

Thanks to them, global organic data is accessible to everyone through The World of Organic Agriculture yearbook and dynamic statistics on the organic-world.net website. An invaluable asset.

Rosa Maria Bertino, Bio Bank, Italy

The annual surveys make the global development of organic farming tangible and serve as an important reference. They highlight the significance of organic production worldwide and enable the correct assessment of the national status of development in the organic sector

Urs Brändli, President Bio Suisse, Switzerland

For 25 years now, the international patron of BIOFACH, IFOAM – Organics International, and the Research Institute of Organic Agriculture, FiBL, have been making an invaluable contribution to ecological and sustainable future shaping with “The World of Organic Agriculture”!

For everyone in the sector and the community, this (data) publication is a true “must-read” – it provides well-founded facts and analyses, offering guidance and setting the course for the future!

Danila Brunner, Executive Director BIOFACH / VIVANESS, Germany

The publication has become the most important reference for the development of organic farming. The data, statistics, and trends are interesting and very meaningful. I have been using the data from World of Organics for over 15 years as a valuable basis for decision-making. For market development, the data, trends, and forecasts for the demand for organic products help me create and assess where action is needed.

For agricultural policy studies, I use the data to assess specific developments. Especially in the development of organic farming, it has been and still is important to be able to classify changes in certain regions in relation to other regions or to the whole. For the future, I hope that data collection will be continued. Furthermore, I would be pleased if the data quality is further improved, and the scope of information is expanded, especially concerning the markets.

Klaus Büchel, Klaus Büchel Anstalt, Liechtenstein

One of the standout highlights at Biofach is the annual release of the global organic farming statistical yearbook, a collaborative effort between FiBL and IFOAM. This comprehensive publication offers valuable insights into the current status of organic agriculture worldwide, in Europe, and at the national level, utilizing the latest available data.

Dr. Dóra Drexler, Hungarian Institute of Organic Agriculture ÖMKi Hungary

The Interamerican Commission on Organic Agriculture (CIAO) highly values the joint work with FiBL, we hope to continue contributing to the quality of the information to have increasingly accurate statistics.

Juan Manuel Gámez, Inter-American Commission for Organic Agriculture CIAO, Argentina

The FiBL statistics serve as an invaluable tool for examining organic markets and narrating the evolution of organic production.

With their visually appealing, concise, and informative presentation, these statistics are a vital resource for both policy makers and market analysts.

They provide a robust and readily accessible foundation upon which to make informed decisions. The FiBL statistics have been a true blessing for the organic movement, playing a pivotal role in the ongoing advancement of the organic sector.

My profound gratitude extends to all those dedicated individuals who diligently undertake the often challenging and underappreciated work of gathering, verifying, and presenting these figures.

*Dr. Benedikt Haug, Lecturer at Wageningen University and
freelance organic market developer, The Netherlands*

Having the most up-to-date organic data is essential, as it provides valuable insights for program and business design by offering a clear understanding of trends. However, in many Asian countries, there are no dedicated agencies responsible for collecting such data, necessitating the need to explore alternative methods

Dr. Shaikh Tanveer Hossain, Director, Policy & Strategy, IFOAM - Organics Asia

The Interamerican Commission on Organic Agriculture (CIAO) countries consider FiBL's work as the sole global reference for collecting, systematizing, analyzing, and publishing standardized global organic production data. They highly value this information as a fundamental resource for their work within each country and express high satisfaction in contributing to FiBL's annual data collection

Gabriela Lacaze, Inter-American Commission for Organic Agriculture CIAO, Argentina

The work that Helga Willer and her team are doing on this annual publication and data collection is really important.

It is extremely critical for the development of organic farming and production that we have up-to-date data and information available.

Aura Lamminparras, Executive Director, Finnish Organic Food Association Pro Luomu

This invaluable publication provides a comprehensive overview of regional trade data that is essential for our industry. It enables us to establish a global ranking of leaders in production and sales, which is a vital resource in our discussions with government officials. Despite our sector's relatively small size compared to non-organic counterparts, our global ranking piques their interest and helps us advocate for continued support for organic initiatives

Tia Loftsgard, Executive Director, Canada Organic Trade Association

In the era of big data analytics and data-driven decision-making, data collection plays a crucial role.

Data in organic agriculture not only enhance transparency but also contribute significantly to bolstering consumer confidence in organic products and the certification process itself.

This underscores the meaningful and important work carried out by all certification bodies.

Virginija Lukšienė, Ekoagros, Lithuania

Great to see the World of Organic marking its 25th edition.

It continues to remain a go-to reference tool for people monitoring organic production and market trends worldwide.

Organic Agriculture Worldwide: Key Indicators

This reflects the important work undertaken by Helga Willer, the team at FiBL and all the various partners over the years.

Stephen Meredith, Head of Policy, Irish Organic Association, Ireland

The initial concept aimed to materialize an emerging idea in agriculture and nutrition. Metrics related to farmers, land areas, and turnover were a fitting choice for this purpose.

Helga Willer emerged as the perfect figure to breathe life into this initially dry undertaking. What began as a publication of less than 20 pages eventually expanded to 360 pages per issue. The network of data providers from various countries, along with Helga's team at FiBL, continued to grow.

It was through rigorous quality control that the information attained its current value, enabling policymakers and businesses to base their decisions upon it. Over time, it has evolved into the global yearbook of a highly promising industry.

*Prof. Dr. Urs Niggli, President of the Institute of Agroecology and
Former Director of the Research Institute of Organic Agriculture FiBL, Switzerland*

The data provided by FiBL and IFOAM for the global organic movement is highly appreciated.

Vitoon Panyakul, Green Net, Thailand

Congratulations to the team behind the book "The World of Organic Agriculture" and the organizations that have made this publication possible for 25 years!

This book has grown to be the most vital and dependable source of information for producers, researchers, policymakers, consumers, NGOs, media, and diverse stakeholders around the world. It stands as the most systematic repository of global organic statistics and history.

It is imperative to continue releasing "The World of Organic Agriculture" in the future.

*Natalie Prokopchuk, Swiss-Ukrainian Program "Higher Value Added Trade from the Organic
and Dairy Sector in Ukraine", Kyiv, Ukraine*

The World of Organic Agriculture is like the bible of the organic food industry. Produced annually, it is the most comprehensive report on organic farming, production, and markets worldwide. I am proud to contribute each year to this important publication!

Amarjit Sahota, Director of Ecovia Intelligence, London, UK

For 25 years, this publication has stood as a unique and invaluable resource, providing a comprehensive global overview of the development of organic farming. Its depth and breadth render it an indispensable tool for comprehending and influencing the future of sustainable, organic agriculture.

Personally, I extend my deep appreciation to Helga Willer for her commitment to collecting all the data and to the hundreds of individuals who have generously contributed essential data throughout the years.

Jan Trávníček, Czech Organics, Czechia, FiBL Organic Statistics Team

The significance of having access to dependable data concerning organic agriculture from all countries in one central source, specifically within the publication "The World of Organic Agriculture", is self-evident. This holds particular importance for Ukraine, which is committed to securing its place on the global organic map, solidifying its leading role as a supplier of

organic products to international markets, and nurturing the growth of its domestic organic sector. The collection and analysis of reliable information constitute an essential component of the decision-making process, both at the national level and for individual producers.

The ongoing efforts of the FiBL and IFOAM initiative have played a pivotal role in constructing a comprehensive overview of the current state of organic agriculture worldwide, enabling the monitoring of trends in the global organic sector. “The World of Organic Agriculture” serves as an invaluable resource for the Ministry of Agrarian Policy and Food of Ukraine and for Ukrainian organic producers. It facilitates discussions on international experiences and collaborative endeavors aimed at enhancing the competitiveness of Ukrainian organic products in the global marketplace.

Ukraine has consistently contributed information about its organic agriculture to this publication over the years, and we, at the Ministry of Agrarian Policy and Food of Ukraine, are delighted to be partners in providing this essential data about Ukraine.

We extend our best wishes for the team's continued success in this important undertaking. May organic agriculture flourish worldwide!

Taras Vysotskyi, First Deputy Minister of Agrarian Policy and Food of Ukraine

According to “The World of Organic Agriculture - Statistics and Emerging Trends”, China ranks fourth globally in both the organic market and organic agricultural area.

Understanding our global position and realizing our potential for organic development by referencing developed countries in the organic sector is of significant importance to us.

Prof. Dr. Qiao Yuhui, China Agricultural University, Beijing, China

The statistical data provided in the annual FiBL-IFOAM publication have been instrumental in comprehending the current state of the organic sector in Kazakhstan and other countries within the Eurasian Economic Union (EAEU), where data collection remains challenging.

Often, the FiBL-IFOAM statistics serve as the sole reliable source, not only for researchers but also for government authorities, organic producer organizations, and other stakeholders in the region.

The absence of data on organic production, exports, imports, domestic consumption, allowable inputs, and other vital information creates a bottleneck and hinders countries' ability to accurately assess the sector's development requirements and formulate policies to support producers and trade.

The work of FiBL and IFOAM can offer valuable insights for the development of effective national data collection systems.

Raushan Zhazykbayeva, International legal expert, Kazakhstan

Organic Agriculture: Key Indicators and Top Countries

Indicator	World	Top countries
Countries with organic activities¹	2022: 188 countries	
Organic agricultural land	2022: 96.4 million hectares (2000: 15 million hectares)	Australia (53.0 million hectares) India (4.7 million hectares) Argentina (4.1 million hectares)
Organic share of total agricultural land	2022: 2.0 %	Liechtenstein (43.0 %) Austria (27.5 %) Estonia (23.4 %)
Increase of organic agricultural land 2021/2022	20.3 million hectares (ha); +26.6 %	Australia: 17'328'259 ha (+48.6 %), India: 2'068'825 ha (+77.8 %) Greece: 390'223 ha (+73.0 %)
Wild collection and further non-agricultural areas	2022: 34.6 million hectares (ha) (1999: 4.1 million hectares)	Finland (6.9 million hectares) India (4.4 million hectares) Zambia (3.2 million hectares)
Producers	2022: 4.5 million producers (1999: 200'000 producers)	India (2'480'859) Uganda (404'246) Thailand (121'540)
Organic market²	2022: 134.8 billion euros (2000: 15.1 billion euros)	US (58.6 billion euros) Germany (15.3 billion euros) China (12.4 billion euros)
Per capita consumption	2022: 17.0 euros	Switzerland (437 euros) Denmark (365 euros) Austria (274 euros)
Number of countries/territories with organic regulations	75 (fully implemented) 14 (drafting)	
Number of affiliates of IFOAM – Organics International	2022: 781 affiliates	Germany: 80 affiliates China: 52 affiliates India: 49 affiliates USA: 45 affiliates

Source: FiBL survey 2024, 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 <https://unstats.un.org/unsd/methodology/m49/>

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 127.5 billion euros in 2022 (see article by Sahota in this volume). One euro corresponded to 1.0530 US dollars in 2022 according to the European Central Bank.

The World of Organic Agriculture 2024: Summary

JAN TRÁVNÍČEK¹, BERNHARD SCHLATTER,² AND HELGA WILLER³

The latest global organic agriculture data for 2022 from 188 countries paint an exceptional picture. In an unprecedented surge, organic farmland expanded to over 96 million hectares (mainly due to growth in Australia), and the number of farmers grew strongly, increasing by more than 20 percent to 4.5 million producers. The sales of organic products in the retail sector reached nearly 135 billion euros, despite experiencing slower growth and encountering stagnation and declines in certain European countries.

Statistics on organic area

Nearly 96.4 million hectares of organic farmland

In 2022, nearly 96.4 million hectares of agricultural land were organic (including in-conversion areas). The regions with the largest organic agricultural land areas were Oceania (53.2 million hectares – comprising more than half of the world's organic agricultural land, at 55 percent) and Europe (18.5 million hectares, accounting for 19 percent). Latin America followed with 9.5 million hectares (10 percent), succeeded by Asia with 8.8 million hectares (9.2 percent), Northern America with 3.6 million hectares (3.8 percent), and Africa with 2.7 million hectares (2.8 percent). For details on organic areas, see chapters from page 42).

Australia has the largest area

The countries with the most organic agricultural land were Australia (53.0 million hectares), India (4.7 million hectares) and Argentina (4.1 million hectares).

Globally, 2.0 percent of the farmland is organic

In 2022, 2.0 percent of the world's agricultural land was organic. The highest organic shares of the total agricultural land, by region, were in Oceania (14.3 percent) and in Europe (3.7 percent; European Union: 10.4 percent).

Liechtenstein had the highest organic share, with 43.0 percent

Some countries achieve significantly higher organic shares compared to the global average. Liechtenstein (43.0 percent), Austria (27.5 percent), and Estonia (23.4 percent) had the highest organic shares. Remarkably, in 22 countries, 10 percent or more of their agricultural land was organic, setting a new record.

¹ Jan Trávníček, Czech Organics, Staré Město, Czech Republic, www.czechorganics.com

² Bernhard Schlatter, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

³ Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

Unprecedented growth in organic farmland – Increase of 20.3 million hectares

Organic farmland witnessed a substantial expansion of 20.3 million hectares (26.6 percent) in 2022, with numerous countries reporting significant growth. The largest increases in absolute terms were observed in Australia, India, and Greece. Australia's organic farmland surged by more than 17'328'259 hectares (+49 percent), while India experienced a growth of nearly 2'068'825 hectares (+78 percent), and Greece saw an increase of almost 390'223 hectares (+73 percent). Nevertheless, some countries experienced a decrease in organic farmland, with the most significant decline occurring in the Russian Federation, where data showed a reduction of nearly 0.5 million hectares.

Increase of organic farmland in all continents

In 2022, organic agricultural land increased on all continents. The highest absolute growth was in Oceania (+47.8 percent, +17.2 million hectares), followed by Asia (+35.9 percent, +0.39 million hectares), North America (+10.7 percent, +0.35 million hectares), Africa (+4.9 percent, +0.1 million hectares), Europe (+1 percent, +0.2 million hectares), and Latin America (+0.6 percent, +52'996 hectares).

Growth in most major crop groups

Land use and crop details were available for over 92 percent of the organic agricultural land. However, some countries with very large organic areas, such as Brazil and India, had limited or no information on their land use (see chapter from page 61).

Grassland/grazing areas constituted more than two-thirds of the organic agricultural land, accounting for over 67.6 million hectares and experiencing a 25.5 percent increase in 2022.

Arable land, covering almost 15.1 million hectares, made up 15.6 percent of the organic agricultural land. Although this category reported a 0.7 percent decrease since 2021, it was primarily utilized for cereals, including rice, along with green fodder from arable land, oilseeds, textile crops, and dry pulses.

Permanent crops occupied 6.6 percent of the organic agricultural land, totalling over 6.2 million hectares. Compared to the previous survey, a modest increase of more than 48'000 hectares or 0.8 percent was reported. The most significant crops in this category included nuts, olives, coffee, grapes, and cocoa (see chapter on land use in organic agriculture from page 61).

Organic citrus

The contribution on organic citrus fruits by Garibay and Bernet (page 95) discusses the growth and challenges in organic citrus production. From 2004 to 2022, global organic citrus acreage increased by over 86'000 hectares but experienced a 3.3% decline in 2022. Europe leads in production, with Italy and Spain being the top producers, followed by contributions from Latin America and Africa. This decline is partly attributed to citrus greening disease, while further challenges include lower yields, nutrition and resilience concerns, and pest and disease management. Key exports to the EU and US include lemons, limes, and oranges, with South Africa, Mexico and Colombia as major exporters.

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 34.6 million hectares, and all the organic areas together summed up to 132.4 million hectares (see chapter from page 67).

Organic producers on the rise – 4.5 million producers in 2022¹

In 2022, the global count of organic producers surged to a staggering 4.5 million. Asia led the way with a commanding 61 percent of the world's organic producers, closely trailed by Africa at 22 percent, Europe at 11 percent, and Latin America at 6 percent. The top three countries with the highest number of organic producers were India (2'480'859), Uganda (404'246), and Thailand (121'540). Notably, there was a remarkable increase in the number of producers, with a dramatic rise of nearly 919'000 or an astonishing 25.6 percent growth compared to 2021. For more information on organic operators, see page 49.

Increase in exports to the USA, decline in exports to the EU

In 2022, the EU and USA collectively imported nearly 4.9 million metric tonnes of organic products, marking a 4.2 percent increase of approximately 197'000 metric tonnes. While total exports to the EU decreased by 146'173 MT (-5.1 percent), exports to the USA increased by 342'867 MT (+18.8 percent). Ecuador emerged as the leading exporter, followed by Mexico and Peru. Significant export growth was observed in Mexico, Togo, and China, while notable declines were seen in imports from India, the United Kingdom, and Chile. The top three imported organic products were bananas, soybeans, and sugar, accounting for 46 percent of total imports. The US, the Netherlands, and Germany served as the primary importers, comprising nearly 74 percent of all organic imports (please note that the import volumes to the US are not complete). For more information, see page 53.

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.

Global market reached nearly 135 billion euros

Organic food and drink sales reached nearly 135 billion euros^{1,2}, according to FiBL (page 56)^{3,4} in 2022. In 2022, the countries with the largest organic markets were the United States (58.6 billion euros), Germany (15.3 billion euros) and China (12.4 billion euros). The largest single market was the United States (43 percent of the global market), followed by the European Union (45.1 billion euros, 34 percent) and China (12.4 billion euros, 9.2 percent). Switzerland had the highest per-capita consumption in 2022, with 437 euros. The highest organic market shares were reached in Denmark (12.0 percent), Austria (11.5 percent) and Switzerland (11.2 percent). Several markets experienced a decline, and in Europe, organic retail sales decreased by more than two percent. In North America, however, the market increased. For more information, see page 56.

According to Sahota (page 106), the major challenges facing the global organic food market include rising food prices due to inflation, geopolitical factors disrupting supply chains, the impact of the Ukrainian conflict on the economy, and concerns about oversupply in the wake of increased demand during the pandemic. Consumer demand for organic products varies, driven by health reasons, ethical considerations, and environmental concerns. However, competition from products like plant-based foods and GMO-free items makes it challenging to differentiate organic foods in the market. In conclusion, while global organic food sales stabilized after a surge in 2020, challenges such as inflation and supply disruptions have affected consumer demand. Growth is expected to resume as economic conditions improve.

Statistics of the Biodynamic Federation Demeter International

The Biodynamic Federation Demeter International is an umbrella organization comprising 48 member organizations committed to biodynamic agriculture. This movement is set to mark its centenary in 2024. Collectively, the network of the Biodynamic Federation Demeter International encompasses more than 7'000 Demeter farms, spread across a vast expanse of over 255'000 hectares in 62 countries. More details are available from the contribution by Behr (page 100).

Regulations and policies

Organic regulations

Regarding regulations, according to the latest data collected by IFOAM - Organics International, in 2022, 75 countries had fully implemented regulations on organic agriculture. Twenty-one countries had organic regulations that were not fully

¹ 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 127.7 billion EUR in 2022.

² In 2022, 1.0530 US dollars corresponded to 1 euro.

³ 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 127.7 billion EUR in 2022.

⁴ In 2022, 1.0530 US dollars corresponded to 1 euro.

implemented, and 14 were drafting legislation. The guidance for growers' groups under the new EU Organic Regulation 2018/848 introduces significant changes impacting millions of organic farmers globally. IFOAM - Organics International has provided guidance to assess these changes. The Pacific Organic Standard Guidebook enhances consistency, and Australia's decision against domestic organic regulation led to the formation of the Organic Development Group. Meanwhile, New Zealand's Organic Products and Production Act supports sector growth and exports. Lastly, the Memorandum of Understanding between Canada and Mexico promotes equivalence of organic products, facilitating trade and cooperation. (See by Hysa et al. on page 112).

Policies for organic farming

A growing number of governments across the globe are actively championing agroecological policies, demonstrating their commitment through the introduction of new initiatives and programs characterized by clear, predefined objectives. Countries like Tanzania, Vietnam, Cambodia, Japan, and Taiwan are notable examples of this trend. Simultaneously, on a regional scale, there is a discernible surge in the adoption of agroecological policies, driven by the formulation of strategic initiatives. Noteworthy instances include the collective efforts of ASEAN countries and the proactive measures taken by members of the African Union. For more information, see article by Hysa et al. on page 112.

Participatory Guarantee Systems in 2022

IFOAM - Organics International is the sole organization collecting global data on PGS. In total, the global PGS landscape encompasses 64'740 initiatives and 188'709 certified producers, impacting the lives of 1'823'525 individuals. The certified land area at the global level spans an impressive 1'131'933 hectares, emphasizing the collaborative effort across continents to promote and adopt PGS in agriculture (see article from Flores et al. on page 121).

Organic in the regions

Africa

In 2022, Africa boasted more than 2.7 million hectares of certified organic agricultural land, representing a remarkable 4.9 percent increase of nearly 128'000 hectares compared to 2021. The continent also reported over 975'000 producers involved in organic farming. Uganda stood out as the country with the largest organic area, exceeding 505'000 hectares in 2022, and also claiming the highest number of organic producers, with over 404'000. Notably, the island state of São Tomé and Príncipe dedicated 21.1 percent of its agricultural land to organic crops, showcasing the region's commitment to organic farming. Most certified organic products from Africa are destined for export markets, with key crops including cocoa, cotton, coffee, oilseeds, nuts, and olives. For more information about statistics in Africa, see page 165. Furthermore, five African countries have existing legislation on organic agriculture, while an additional five are in the process of drafting such legislation (see article by Hysa et al. on page 112).

Ecological Organic Agriculture (EOA) in Africa has continued to receive attention from various stakeholders, including farmers, practitioners, researchers, policymakers, and others, particularly in the wake of shocks caused by the COVID-19 pandemic, the war in Ukraine, conflicts in the Middle East, and other environmental crises. Various studies conducted on organic and conventional systems have demonstrated the potential of EOA to contribute to food security and nutrition, restore land degradation, alleviate poverty, mitigate climate change, and enhance resilience, among other socioeconomic and environmental benefits. Some of these aspects were central to the 1st Eastern Africa Agroecology Conference (EAAC) held in March 2023. Presentations at the conference highlighted the growth of EOA, the momentum it has gained, and the progress in organic policy adoption in countries such as Uganda and Tanzania. For more updates about Africa, see the contribution by Amudavi et al., page 130.

Asia

In 2022, Asia had over 8.8 million hectares of agricultural land managed by 2.7 million producers. The majority of these producers were in India, where their numbers increased by one million from 2021 to 2022, significantly contributing to the global growth of organic farmers. India, with 4.73 million hectares, and China, with over 2.90 million hectares, emerged as the leading countries in terms of organic agricultural land. Notably, Timor-Leste stood out with the highest proportion of organic agricultural land at 8.5 percent. For more information about Asian statistics, see page 165). The region demonstrated a strong commitment to organic practices, with twenty-two countries having legislation in place for organic agriculture, while seven countries were in the process of drafting relevant legislation (see article by Hysa et al. on page 112 for further details).

In 2023, Asia's organic sector saw notable developments, including comprehensive support plans by various governments like Japan's Sustainable Food Systems Strategy, Kyrgyzstan's focus on organic agriculture in its "Five Years of Action for the Development of Mountain Regions," and Saudi Arabia's integrated support system. The 6th Organic Asia Congress emphasized peace and food security, and new networks, such as the Young Elected Officers Network and Education and Research Network for Organic Agriculture Development (E-ROAD), were established. The 1st International Conference on Organic Agriculture in Drylands and Deserts led to the formation of the "Drylands and Deserts Organic Agriculture Network (DOAN)." The 2nd World Organic Youth Summit discussed youth opportunities in the organic sector. In 2024, IFOAM - Organics Asia plans to introduce a global organic award, co-organize an international conference on school meals and public procurement, and host the World PGS Conference coinciding with the 20th anniversary of the IFOAM PGS launch. Additionally, IFOAM Asia will collaborate with members on pre-conferences and side events for the 21st IFOAM Organic World Congress in Taiwan, highlighting the growing importance of organic agriculture in Asia and efforts to promote regulation, certification, and market expansion. More information is available in the chapter of IFOAM Organic Asia on page 148.

Europe

By the end of 2022, in Europe more than 18.5 million hectares of organic agricultural land (European Union: 16.9 million hectares) were managed organically, overseen by over 480'000 producers (European Union: over 419'000). Within Europe, organic agriculture covered 3.7 percent of the agricultural area (European Union: 10.4 percent). Organic farmland witnessed an increase of over 0.2 million hectares in Europe and 0.8 million hectares in the European Union compared to 2021. The leading countries in terms of organic agricultural areas were France (2.9 million hectares), Spain (2.7 million hectares), and Italy (2.3 million hectares). Notably, 16 countries had at least 10 percent of their farmland dedicated to organic practices, with Liechtenstein leading at 43.0 percent, followed by Austria (27.5 percent) and Estonia (23.4 percent). In 2022, retail sales of organic products amounted to 53.1 billion euros (European Union: 45.1 billion euros), representing a 2.2 percent decrease (-2.8% in the EU) since 2021. Germany ranked as the largest market for organic products with retail sales of 15.3 billion euros, followed by France (12.1 billion euros) and Switzerland (3.9 billion euros). (See the article by Willer et al., page 129 for more details). Across Europe, 43 countries have legislation governing organic agriculture (see article by Hysa et al. on page 112). While organic farmland grew by 5 percent, consolidated data for 2022 indicate stagnation or even decline in retail sales in several countries. To reach the European Commission's goal of 25 percent organic agriculture by 2030, stronger annual growth than in 2021 will be necessary. For more details see chapter by Willer et al, page 186.

Imports of organic agri-food products in the EU declined from 2.87 million metric tons in 2021 to 2.73 million metric tons in 2022, marking a 5.1% decrease. This decline may be linked to reduced demand, likely stemming from a significant rise in food prices during the year. The decrease was mainly driven by reduced imports of fruit and vegetables, sugar, olive and palm oils, sunflower seed, and pet food, with increased imports of organic soybeans, oilcakes, citrus fruit, rice, and honey failing to offset these losses. For details, see the summary on EU organic imports on page 212.

In June 2018, the European Union introduced Regulation 2018/848 for organic products, with amendments and additional regulations continuing until 2023. Notably, international trade in organic products shifted towards direct EU compliance in third countries instead of relying on equivalency agreements. The European Commission's initiatives like the European Green Deal, Farm to Fork, and Biodiversity Strategies aim to achieve sustainable food systems by 2030. However, a 2022 briefing by IFOAM Organics Europe revealed that many Member States lack ambition in developing and supporting organic farming. Without significant changes in Common Agricultural Policy (CAP) Strategic Plans, achieving the goal of 25 percent organic land in Europe by 2030 seems unlikely. For details, see contribution by Schmutzler et al. on page 173.

Latin America and the Caribbean

In Latin America, a workforce of over 270'000 producers managed more than 9.5 million hectares of agricultural land organically in 2022. This area represented 9.9 percent of the world's organic land and 1.3 percent of the region's agricultural land. Leading countries in the region were Argentina (4.1 million hectares), Uruguay (2.7

million hectares), and Brazil (1.0 million hectares). Uruguay boasted the highest organic share of total agricultural land at 19.6 percent, followed by Dominica (11.6 percent) and French Guiana (11.1 percent). Several Latin American countries maintained their status as significant exporters of organic products, including coffee, cocoa, and bananas (see chapter on statistics on page 224). Nineteen countries in the region had legislation governing organic agriculture, with two more in the process of drafting such legislation (See article by Hysa et al. on page 112). Brazil stood out as the largest market for organic products in Latin America.

In 2023, Latin American organic production faced challenges due to changes in EU and US organic regulations. Grower group certification changes impacted cooperatives in Costa Rica, leading some to disband organic groups. Indigenous associations also faced difficulties. Concerns about the new EU regulation's impact on producer organizations were also raised at the Interamerican Commission for Organic Farming conference. It's anticipated that many groups in Latin America may stop EU certification, focus on the US market, or exit the organic sector, potentially reducing regional organic production. Recent international Agreements included Canada and Mexico signing a Memorandum of Understanding recognizing each other's organic regulations. Argentina and Costa Rica are renegotiating their Third Country agreement with the EU. For more information see contribution from Soto on page 218.

North America

In North America, organic farming covered more than 3.6 million hectares in 2023, with 2.06 million hectares in the United States and 1.56 million hectares in Canada. This constituted 0.8 percent of the total agricultural area in the region. The organic market in North America achieved sales of 64.4 billion euros. For details, see page 244.

United States

According to OTA's 2023 Organic Industry Survey, organic food sales in the United States in 2022 broke through the 60 billion US dollar (58.6 billion euros) mark for the first time, hitting another high-level mark for the resilient organic sector. 2.1 Million hectares or 0.5 percent of the farmland, were under organic management.

In 2023, the US organic sector achieved significant regulatory victories with the introduction of the Strengthening Organic Enforcement (SOE) rule in January and the finalization of the Organic Livestock and Poultry Standards (OLPS) regulation in October. These measures aim to combat fraud, enhance organic standards, and build consumer trust. Additionally, there was a busy legislative calendar with discussions on a new Farm Bill and various bills supporting organic, while the US Department of Agriculture continued to promote organic agriculture through initiatives like the Organic Transition Initiative announced in 2022. For more information see the contribution by Jagiello on page 230.

Canada

In Canada, organic acreage increased significantly by 23 percent in 2022, reaching over 1.5 million hectares. The demand for organic products in Canada remains strong, with the organic sector, including non-food products, reaching 10.26 billion Canadian

dollars in 2022. Organic food and beverage sales were at 5.8 billion euros, marking a 9.7 percent increase from the previous year. Health consciousness is a driving factor behind the demand for organic food, with 23 percent of Canadians buying more organic products than the previous year. Canada also plays a notable role in the global organic marketplace, with increasing exports of organic products, totalling over 405 million Canadian dollars in 2022. Organic imports also grew by over 9 percent since 2021, reaching more than 683 million euros in 2022. Overall, Canada's organic sector continues to experience growth, driven by strong consumer demand and expanding international trade relationships. For more information see the contribution by Loftsgard on page 242.

Oceania

This region includes Australia, New Zealand and the Pacific Islands states. Altogether, there were over 24'000 producers on 53 million hectares, constituting 14.3 percent of the region's agricultural land and more than half the world's organic land. More than 99 percent of the organic land in the region is in Australia (53.0 million hectares, mostly extensive grazing land), followed by New Zealand (over 79'000 hectares) and Samoa (over 47'000 hectares). The highest organic shares of all national agricultural land were in Samoa (16.7 percent), followed by Australia (14.8 percent), Solomon Islands 6.5 percent), French Polynesia (4.8 percent) and Fiji (4.5 percent). Four countries in Oceania have legislation on organic agriculture. (See article by Hysa et al. on page 112). For statistics about organic agriculture in Oceania, see page 257.

Australia

2023 was a productive year for the Australian organic sector as far as agriculture is concerned, with a return to more favourable growing conditions following the disastrous East Australian flood events of early 2022. While challenges prevailed around supply chain and other logistics in the wake of the COVID-19 pandemic, many operations were able to re-establish themselves and capitalise on strong demand for organic goods in domestic and export markets. A comprehensive study released in early 2023 showcased the nation's potential to become a major player on the world organic stage (see article by Frampton on page 250).

Pacific Islands

In the post-COVID era, the Pacific region sees rising opportunities in local organic agriculture due to increased tourism, higher food import costs, and a health and wellness focus. Despite these prospects, the sector faces challenges in scaling up and establishing organized value chains. Governments are working on supportive policies, and the demand for organic certification remains strong. Regional and national agencies, along with development partners, acknowledge the importance of organic agriculture for Pacific island development. Notably, French Polynesia is pioneering the use of the FAO Tool for Agroecological Performance in its 2023 agriculture census to distinguish organic from conventional farms on a national scale on a wide range of production, ecological and social indicators—an unprecedented global initiative.

Furthermore, there's a growing focus on women's roles in agriculture and the organic sector, with the regional peak body for organic agriculture establishing a women's chapter. This effort aims to empower women through coordination, information sharing, networking, and capacity building, benefiting the Pacific organic community. (See article by Mapusua on page 254).

Celebrating 25 years “The World of Organic Agriculture”

For 25 years, “The World of Organic Agriculture” yearbook has been a crucial source of global organic farming data. This collaborative project, initiated in 2000, has played a vital role in tracking the remarkable growth of organic farming. Supported by numerous organizations, this data collection effort is essential for the sector, for policymakers and researchers and is primarily disseminated through the yearbook, jointly published by FiBL and IFOAM – Organics International and presented at Biofach. The data is also available online, along with informative infographics. For details, see contribution by Willer, page 19.

Organics for a prosperous future

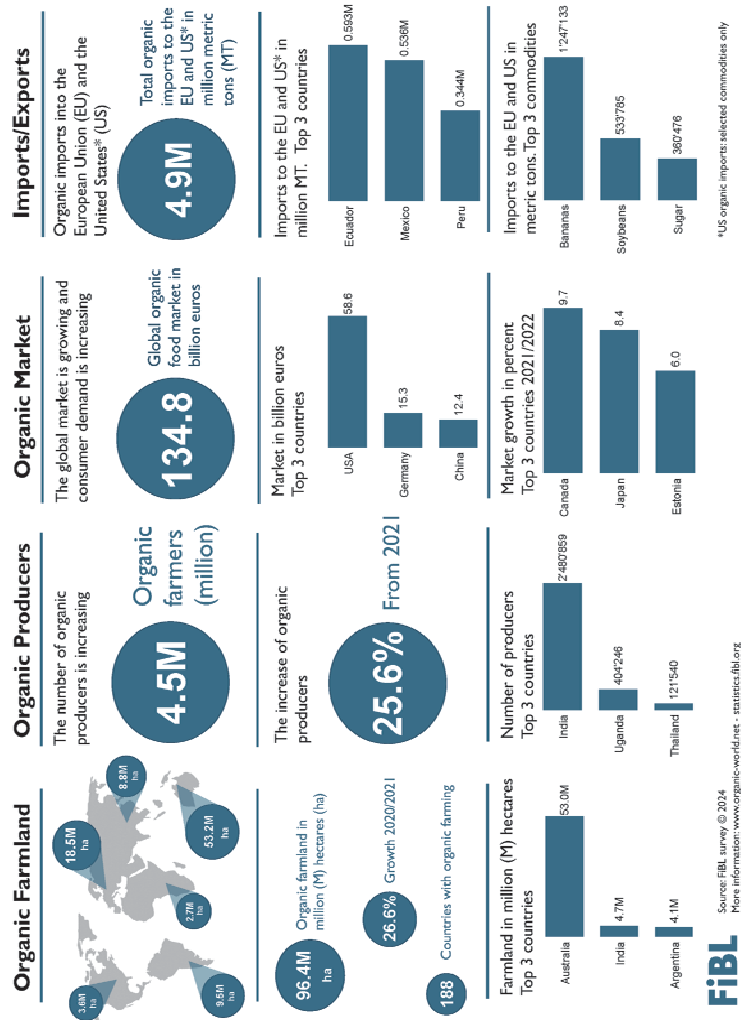
The organic movement plays a crucial role in addressing global environmental challenges. In 2023, IFOAM – Organics International introduced a strategy to promote regenerative organic farming, emphasizing health, ecology, fairness, and care. This strategy aims to empower the organic community by providing resources, fostering development, and positioning organic agriculture as a solution to global issues. IFOAM plans to restructure its membership, enhance capacity, and promote diversity, inviting partners and members to contribute to its vision, with the Organic World Congress 2024 in Taiwan as a key platform for collaboration and innovation. For more information see contribution by Mapusua on page 264.

Next FiBL survey on organic agriculture worldwide

The next global organic survey will start in mid-2024; data will be published in February 2025 and presented at the 2025 edition of 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 2025 edition of “The World of Organic Agriculture”. Corrections will also be posted on www.organic-world.net.

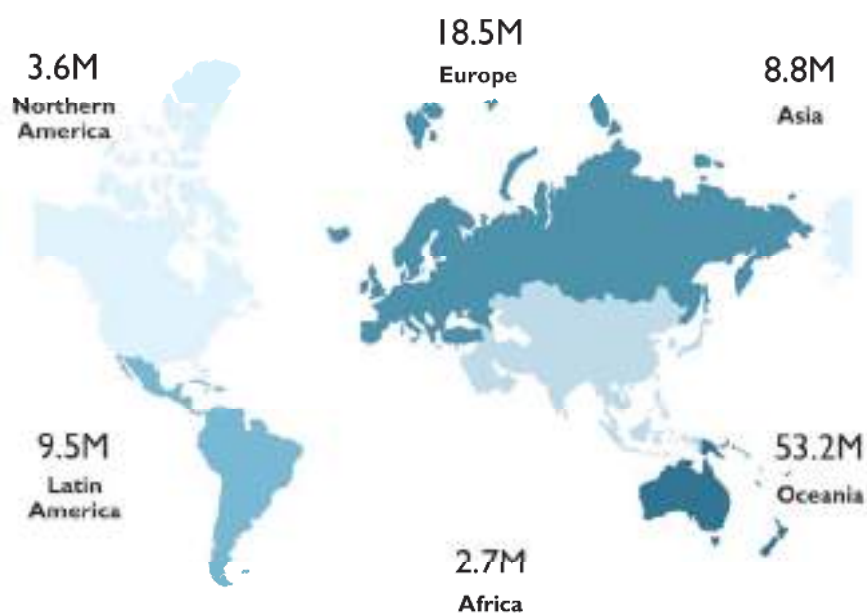
Contact: helga.willer@fibl.org

Organic Agriculture Worldwide 2022



Infographic 1: Organic agriculture worldwide - key indicators 2022
Source: FiBL survey 2024

Organic Agriculture Worldwide: Current Statistics



Organic agricultural land in hectares (M=millions)

Map 1: Organic agricultural land in 2022

Source: FiBL survey 2024

Current Statistics on Organic Agriculture Worldwide: Area, Operators, International Trade and Retail Sales

BERNHARD SCHLATTER¹, JAN TRÁVNÍČEK² AND HELGA WILLER³

Introduction

The 25th 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, and NürnbergMesse.⁴

For this survey, 188 countries were covered using the following indicators: Area, producers and other operator types, retail sales and exports and imports.

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, Bioagricert, CCPB, CERES, Certisys, Control Union, Ecocert, Mayacert, Ecoglobe, Ekoagros, Imocert, Kiwa BCS Öko-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) eases 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, the statistical office of the European Union. A list of all data sources and contacts is provided in the annex. For more details about the data providers, the countries and indicators covered as well as general notes on the data, see page 351.

More information on statistics.fibl.org

Interactive tables and graphs with more details on crops, markets, and international trade, as well as explanations for data, can be found on FiBL's statistics website statistics.fibl.org.

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

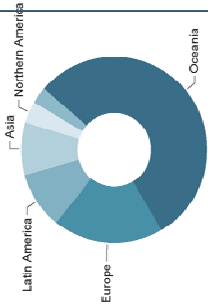
³ Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

⁴ 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.

WORLD: ORGANIC FARMLAND 2022



In Oceania there were 53.2 million (M) hectares (ha), in Europe 18.5 million ha and in Latin America 9.5 million ha.

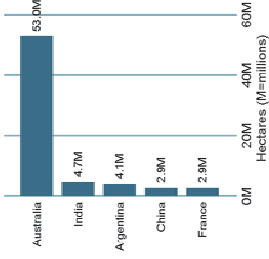


Distribution of organic agricultural land by region 2022

FiBL

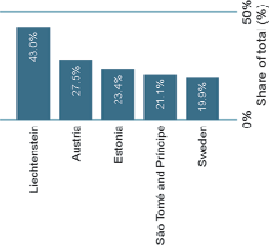
www.fibl.org

The ten countries with the largest organic agricultural areas represented 82% of the world's organic agricultural land.



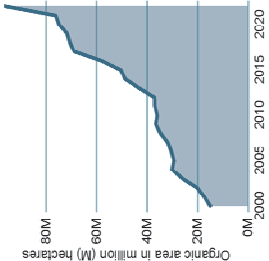
The five countries with the largest areas of organic agricultural land 2022

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



Top 5 countries with more than 10% of organic agricultural land 2022

In 2022, almost 20.3 million hectares more were reported compared with 2021.



Growth of the organic agricultural land 2000-2022

Source: FiBL 2024 www.organic-world.net - statistics.fibl.org

Infographic 2: Organic farmland 2022

Source: FiBL survey 2024

Organic land

Organic agricultural land

In 2022, 96.4 million hectares were under organic agricultural management worldwide.¹ This constituted 2.0 percent of the total farmland. Organic farmland increased by 26.6 percent or by 20.3 million hectares in 2022.

- The region with the most organic agricultural land was Oceania, with 53.2 million hectares, followed by Europe with 18.5 million, Latin America (9.5 million), Asia (8.8 million), Northern America (3.6 million) and Africa (2.7 million).
- Oceania had more than half (55 percent) of the global organic agricultural land. Europe, a region that has had a very constant growth of organic land over the years, had over 19 percent of the world's organic agricultural land, followed by Latin America with almost 10 percent (Figure 1, page 43).
- Australia was the country with the most organic agricultural land; it is estimated that 97 percent of the farmland is extensive grazing areas. India was second, followed by Argentina in third place (Figure 2, page 43).
- The ten countries with the largest organic agricultural areas had a combined total of 79.3 million hectares (82 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 constituted approximately 35 million hectares.

Table 1: World: Organic agricultural land (including in-conversion areas) by region: growth 2021 to 2022, and 10-year growth

Region	Organic agri. land 2021 [ha]	Organic agri. land 2022 [ha]	Share of total [%]	1-year growth [ha]	1-year growth [%]	10-year growth [ha]	10-year growth [%]
Africa	2'607'489	2'735'006	2.8	127'518	4.9	1'531'669	127.3
Asia	6'496'002	8'830'990	9.2	2'334'989	35.9	5'440'949	160.5
Europe	18'258'903	18'450'355	19.1	191'452	1.0	7'081'206	62.3
Latin America	9'484'391	9'537'387	9.9	52'996	0.6	2'825'835	42.1
North America	3'276'330	3'627'818	3.8	351'488	10.7	580'109	19.0
Oceania	35'985'809	53'194'639	55.2	17'208'830	47.8	35'872'906	207.1
World*	76'108'924	96'376'196	100.0	20'267'272	26.6	53'332'674	123.9

Source: FiBL survey 2024, based on data from government bodies, the private sector, and certifiers. For detailed data sources, see annex, page 335. * Total includes correction value for French Overseas Departments

Figures and tables on organic land

- Figures on organic farmland can be found on the following pages.
- Tables with area data per country can be found from page 271.

¹ Data provided both for the fully converted and in conversion area are included in this work. However, the conversion area is not known for many countries.

World: Distribution of organic agricultural land by region 2022

Source: FiBL survey 2024

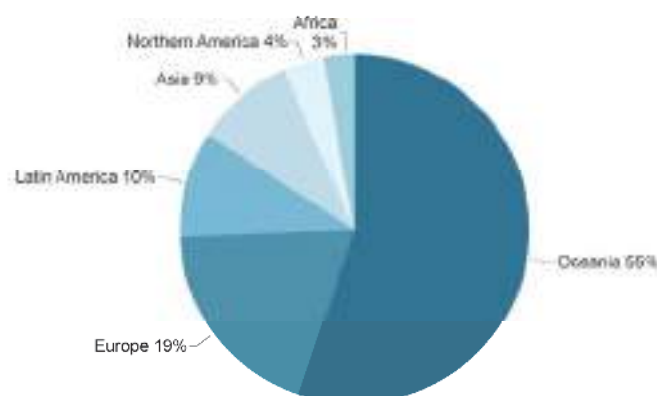


Figure 1: World: Distribution of organic agricultural land by region 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

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

Source: FiBL survey 2024

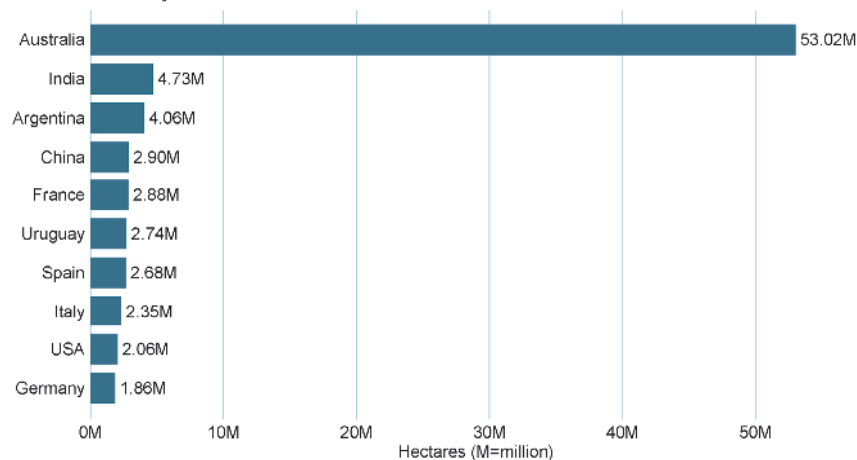


Figure 2: World: The ten countries with the largest areas of organic agricultural land 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Organic share of total agricultural land

The share of the world's agricultural land that is organic was 2.0 percent in 2022.

- The highest organic share of total agricultural land, by region, was in Oceania (14.3 percent), followed by Europe with 3.7 percent and Latin America with 1.3 percent. In the European Union, the organic share of the total agricultural land was 10.4 percent. In the other regions, the share is less than one percent.
- Many individual countries, however, have a much higher organic share (Table 31, page 276), and in 21 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 43 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 São Tomé and Príncipe and Príncipe and Dominica.
- However, 54 percent of the countries for which data is available had less than one percent of their agricultural land under organic management.

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

Source: FiBL survey 2024

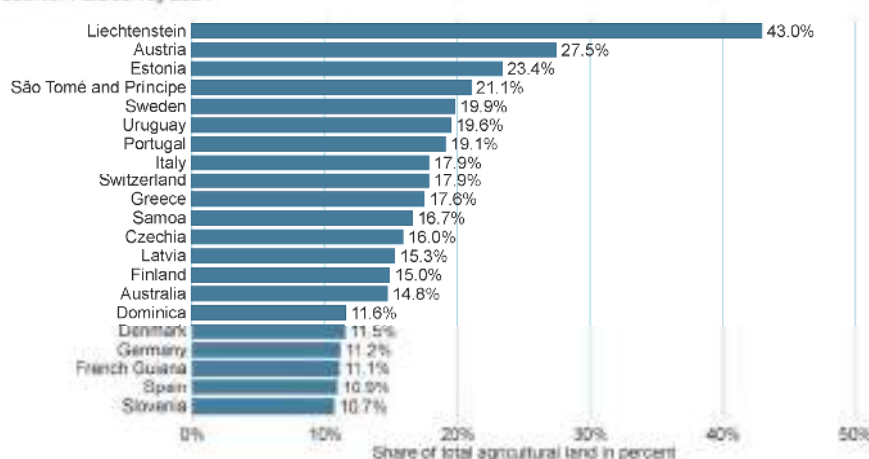


Figure 3: World: Countries with an organic share of the total agricultural land of at least 10 percent 2022

Source: FiBL survey 2024, 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 335.

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. 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. FAOSTAT, the FAO Homepage, FAO, Rome at faostat3.fao.org > Agri-Environmental Indicators > Download <http://www.fao.org/faostat/en/#data/RL>

Growth of the organic agricultural land

Compared with 2000, when 20 million hectares were organic, organic agricultural land has increased more than five-fold (2022).

- In 2022, 20.3 million hectares, or 26.6 percent, more were reported compared with 2021.
- In 2022, the organic agricultural land increased in all continents (Table 1). The highest absolute and relative growth was in Oceania (+17.2 million hectares, +47.8 percent), followed by Asia (+35.9 percent, +2.3 million hectares) and North America (+10.7 percent, +0.35 million hectares).
- Some countries reported a significant increase, mainly Australia (48.6 percent increase; over 17.3 million hectares more), India (77.8 percent increase; almost 2.1 million hectares more), and Greece (73.0 percent increase; almost 0.4 million hectares more) (Figure 6).
- Seventy-nine countries experienced an increase in the area of their organic agricultural land, while a decrease was reported in 42 countries. In 40 countries, the organic agricultural area either did not change, or no new data was received.

The figures shown in the tables and graphs with historical figures may differ from what was previously communicated, as data revisions were received and included in the FiBL database.

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

Source: FiBL-IFOAM-SOEL surveys 2001-2024

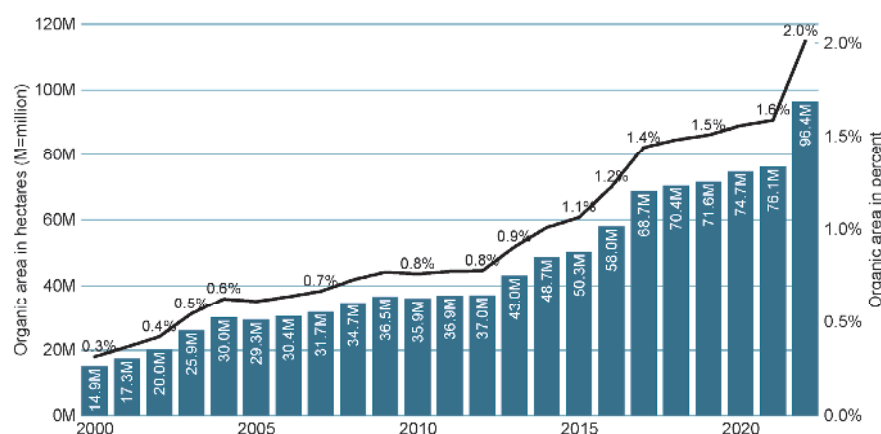


Figure 4: World: Growth of the organic agricultural land and organic share 2000-2022

Source: FiBL-IFOAM-SOEL surveys 2001-2024

World: Growth of the organic agricultural land by continent 2002 - 2022

Source: FiBL-IFOAM surveys 2001-2024

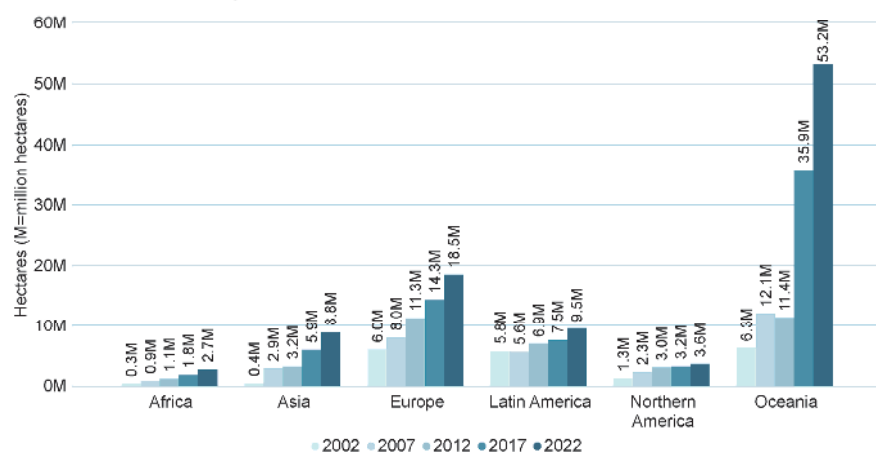


Figure 5: World: Growth of the organic agricultural land by continent 2002 to 2022

Source: FiBL-IFOAM-SOEL surveys 2001-2024

World: The ten countries with the highest increase of organic agricultural land 2022

Source: FiBL survey 2024

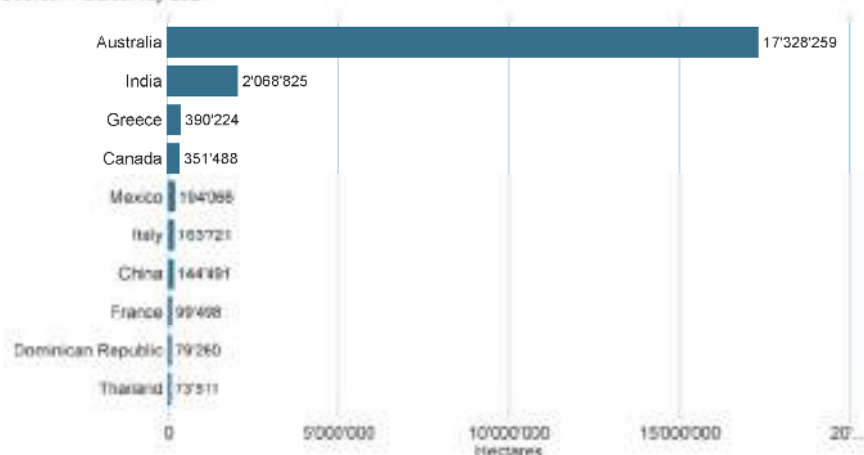


Figure 6: World: The ten countries with the highest increase of organic agricultural land 2022

Source: FiBL survey 2024, based on data from government bodies, the private sector, and certifiers. For detailed data sources, see annex, page 335.

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 34.6 million hectares, and all the organic areas together summed up to 132.4 million hectares.

It should be noted that many countries do not report non-agricultural organic areas. We can, therefore, assume that the data on the other areas are incomplete.

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 40). 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 69 and 70. More information on the use of the wild collection areas is available in the corresponding chapter, page 67.

World: Distribution of all organic areas in 2022

Source: FiBL survey 2024

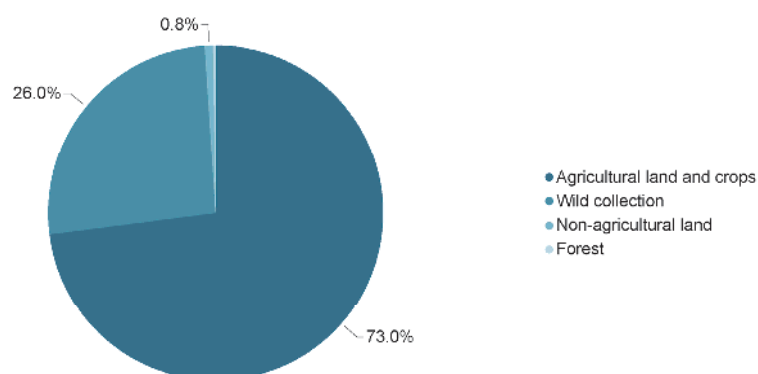


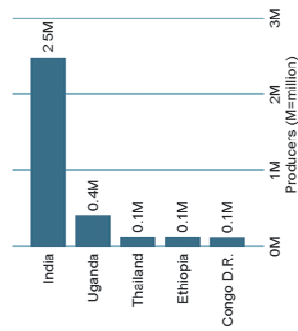
Figure 7: World: Distribution of all organic areas 2022. Total: 132.4 million hectares

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

WORLD: ORGANIC PRODUCERS 2022



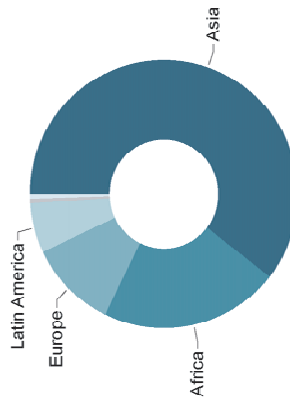
The countries with the most organic producers were India, Uganda, Thailand, and Ethiopia.



The five countries with the most organic producers 2022



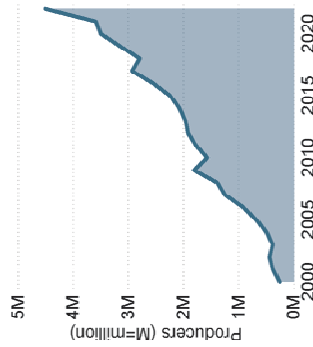
More than 90% of the producers were in Asia, Africa and Europe.



Distribution of organic producers by region 2022



There has been an increase in the number of producers by more than 900 000 or 25.6% between 2021-2022. (Mainly due to an increase in India)



Development of the number of organic producers 2000-2022

Infographic 3: Organic producers 2022

Source: FiBL survey 2024

Organic producers and other operator types

Producers

There were almost 4.5 million organic producers worldwide in 2022.

- According to the data obtained, almost than 93 percent of the producers were in Asia, Africa, and Europe (Table 2, Figure 8).
- The country with the most organic producers was India, followed by Uganda and Thailand.
- There has been an increase in the number of producers of nearly 919'000, or 25.6 percent, compared to 2021. In, Asia, Europe and Oceania, the number of producers increased. In Africa, North America and Latin America there was a decrease in 2022 (Table 2).

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.

Table 2: World: Development of the numbers of producers by region in 2022

Region	2021 [no.]	2022 [no.]	1-year growth [no.]	1-year growth [%]	10-year growth [no.]	10-year growth [%]
Africa	1'034'043	975'334	-58'709	-5.7%	406'659	70.1%
Asia	1'782'125	2'728'678	946'553	53.1%	2'052'502	303.5%
Europe	446'529	480'135	33'606	7.5%	159'652	47.7%
Latin America	278'391	270'217	-8'174	-2.9%	-45'593	-14.4%
Northern America	24'361	23'948	-413	-1.7%	7'478	45.4%
Oceania	18'479	24'466	5'987	32.4%	9'813	67.0%
World	3'583'928	4'502'778	918'850	25.6%	2'590'511	134.7%

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Figures and Tables

- Figures on organic operators can be found on the following pages.
- Tables with operator data per country can be found from page 281.

World: Distribution of organic producers by region 2022

Source: FiBL survey 2024

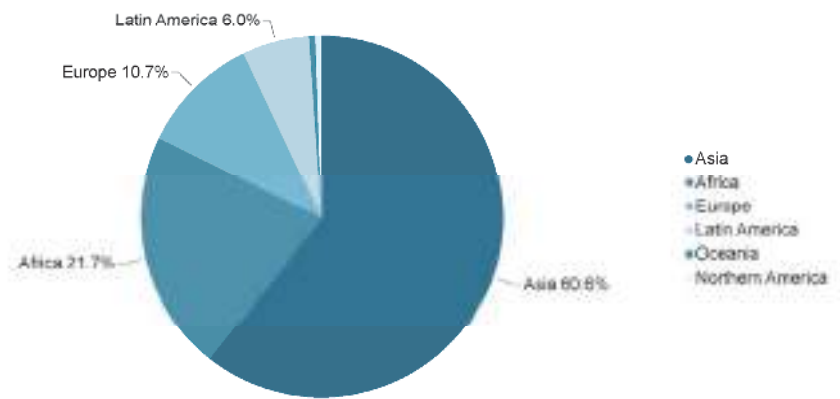


Figure 8: World: Distribution of organic producers by region 2022 (Total: 4.5 million producers)

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

World: The ten countries with the most organic producers 2022

Source: FiBL survey 2024

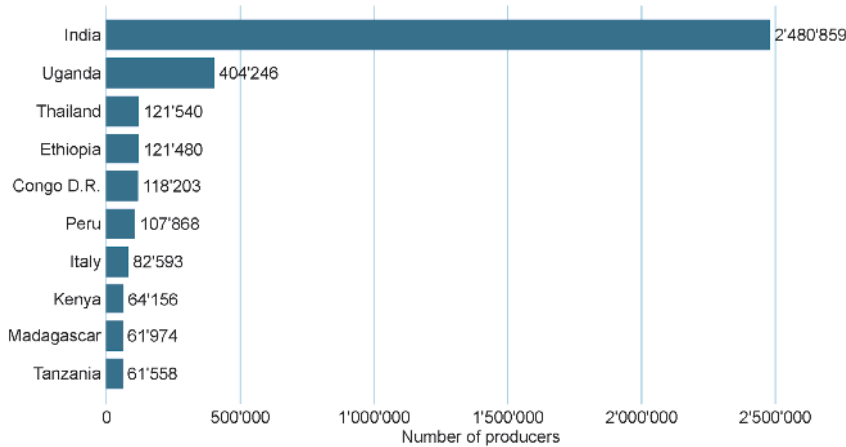


Figure 9: World: The ten countries with the most organic producers

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Table 3: World: Organic producers, processors, importers and exporters by region in 2022

Region	Producers	Processors	Importers	Exporters
Africa	975'334	1'595	21	1'302
Asia	2'728'678	12'969	676	940
Europe	480'135	91'776	7'609	4'885
Latin America	270'217	9'657	138	1'178
Northern America	23'948	1'859		
Oceania	24'466	1'756	1	130
Total	4'502'778	119'612	8'445	8'435

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Further operator types

Regarding data on further operator types, there are over 119'000 processors and approximately 8'400 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 3.

Further operator types reported but not listed here were beekeepers, smallholder groups, and aquaculture enterprises, as well as the number of collectors (wild collection).

EU AND US ORGANIC IMPORTS 2022



International Trade

International trade data is becoming available for more and more countries. These can be expressed in metric tons or as values. Import data were not available for many countries, but since 2018, the European Union (EU) has collected import data; these are available on page 284. Data on US organic imports (values and quantity) are available on the USDA website.

Please note the US organic import data do not cover all commodities.

Table 4: World: Organic imports to the European Union and US by region 2022

Exporting region	Import destination	2022 exports [MT]	1-year growth [MT]	1-year growth [%]
Africa	Export to EU	483'436	54'855	12.8%
	Export to USA	65'997	35'876	119.1%
Africa total		549'432	90'731	19.8%
Asia	Export to EU	553'718	-55'884	-9.2%
	Export to USA	60'666	-4'453	-6.8%
Asia total		614'384	-60'337	-8.9%
Europe	Export to EU	425'153	-90'034	-17.5%
	Export to USA	290'763	118'555	68.8%
Europe total		715'916	28'522	4.1%
Latin America	Export to EU	1'216'711	-39'746	-3.2%
	Export to USA	1'542'680	135'476	9.6%
Latin America total		2'759'391	95'730	3.6%
Northern America	Export to EU	30'076	-12'432	-29.2%
	Export to USA	192'919	55'116	40.0%
Northern America total		222'995	42'684	23.7%
Oceania	Export to EU	17'681	-2'932	-14.2%
	Export to USA	15'876	2'296	16.9%
Oceania total		33'557	-636	-1.9%
Total exports to EU and US		4'895'676	196'694	4.2%
Total exports to EU		2'726'775	-146'173	-5.1%
Total exports to US		2'168'901	342'867	18.8%

Source: TRACES/European Commission, GATS/USDA, compiled by FiBL

– Nearly 4.9 million tonnes of organic products were imported into the EU and USA in 2022

While the European Union imported 2.7 million metric tons of organic products, the United States imported 2.2 million metric tons. In 2022, EU and US organic imports saw an increase of 4.2 percent, totalling almost 197'000 metric tons.

However, it's worth noting that total exports to the European Union decreased by 146'173 metric tons, marking a decline of 5.1 percent. In contrast, total exports to the United States saw a significant increase of 342'867 metric tons, representing an 18.8 percent growth.

- **Ecuador was the largest exporter**

The largest exporters to the EU and US in 2022 were Ecuador (593'219 MT), Mexico (535'728 MT) and Peru (343'960 MT).

- **Large increase in export volume from Mexico, Togo and China**

Mexico (+110'314 MT, +20.6 percent), Togo (+87'682 MT, +54.7 percent) and China (+46'555 MT, +23.4 percent) increased their exports to the EU and US the most.

- **Significant decline in imports from India, United Kingdom and Chile**

Between 2021/2022, imports of organic products into the EU and US decreased the most from India (-73'590 MT, -41.9 percent), the United Kingdom (-53'037 MT, -51%) and Chile (-16'415 MT, -29.9 percent).

- **Bananas, soybeans and sugar – the top three most imported products**

Bananas, soybeans and sugar accounted for 46 percent of total imports of organic commodities in 2022. Bananas were imported at 1'248'982 MT, soybeans at 533'785 MT and sugar at 447'942 MT.

- **Increase for oilseeds and vegetables**

Among the top groups, the largest increase was observed in the category of oilseeds, mainly soybeans (+136'438 MT, +28 percent). Also vegetables increased substantially; the most of the increases was for vegetables from Mexico that were exported to the United States (+86'751 MT, 88 percent increase). On the other hand, decreases were observed for vegetable oils, mainly olive oil from Tunisia and palm oil from Latin America (-54'545 MT, a 15 percent decrease), tropical and subtropical fruits (-44'165 MT, a 3 percent decrease), and feedstuffs (-25'942 MT, a 65 percent decrease)

- **The US, the Netherlands and Germany are the three main important importers**

Almost 74 percent of organic commodities are imported through the top three importing countries into the EU and the US. In 2022, the US imported 2.2 million MT, which accounted for 44 percent of all EU/US organic imports. The Netherlands imported 1.0 million MT (20 percent), followed by Germany with 0.45 million MT (9 percent). It's worth noting that in the case of the Netherlands, a significant portion of the imports is further redistributed.

For detailed data on international trade, please refer to the tables provided in the Annex, section 1.4 International Trade

WORLD: ORGANIC RETAIL SALES 2022



www.fibl.org

FiBL

Distribution of retail sales by region 2022

Source: FiBL 2024 www.organic-world.net - statistics.fibl.org

Infographic 5: Organic retail sales 2022

Source: FiBL survey 2024

Retail sales¹

Whereas Amarjit Sahota presents global trends for the organic market along with much background information (page 106), in this chapter, we show the country-related market data that was compiled under the framework of the FiBL survey on organic agriculture. Please note that due to fluctuation exchange rates a direct year-to-year comparison is often not possible.

Data on total retail sales value was available for 45 countries (about one-quarter 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 135 billion euros in 2022**.
- The country with the **largest market for organic food was the United States** (58.6 billion euros), followed by Germany (15.3 billion euros), China (12.4 billion euros) and France (12.1 billion euros).
- The **largest single market was the United States**, followed by the European Union (45.1 billion euros) and China (12.4 billion euros).
- **By region, North America had the lead** (64.4 billion euros), followed by Europe (53.1 billion euros) and Asia (15.0 billion euros) (Figure 11).
- Market growth was noted in 8 countries for which 2022 data were available, and there was no double-digit increase this year. **Canada was the country that registered the biggest growth**; the market increased by 9.7 percent, followed by Japan (+8.4 percent) and Estonia (+6.0 percent).
- Whereas the highest per capita consumption by region was in Northern America (171.5 euros), by country, it was highest in Europe. In 2022, **Switzerland had the highest per capita consumption** (437 euros) worldwide, followed by Denmark (365 euros), Austria (274 euros) and Luxembourg (259 euros).
- Looking at the **shares the organic market has of the total market, the leader is Denmark** (12.0 percent), followed by Austria (11.5 percent) and Switzerland (11.2 percent).

For detailed data on global retail sales, please refer to the tables provided in the Annex, section 1.5 Organic Retail Sales, page 287.

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).

Table 5: Global market data: Retail sales and per capita consumption by region 2022

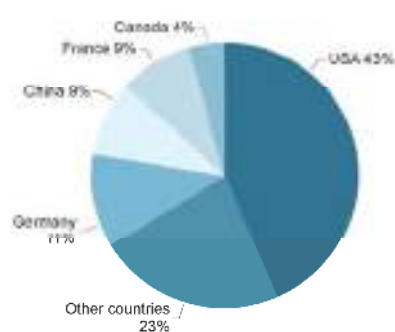
Region	Retail sales [Million €] ¹	Per capita consumption [€]
Africa	No data	No data
Asia	15'032	3.3.
Europe	53'070	64.0
Latin America*	778	
Northern America	64'366	171.5
Oceania	1'510	33.9
Total	134'760	

Source: FiBL-AMI survey 2024, based on data from government bodies, the private sector and market research companies. For data sources, see annex, page 335.

*Data from Belize, Brazil, Chile, Jamaica, Mexico, and Peru only, some of which have not been updated for several years.

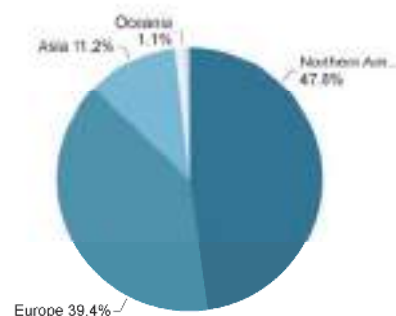
Global market for organic food: Distribution of retail sales by country 2022

Source: FiBL-AMI survey 2024, based on retail sales with organic food



Global market for organic food: Distribution of retail sales by region 2022

Source: FiBL-AMI survey 2024, based on retail sales with organic food

**Figure 10: Global market for organic food: Distribution of retail sales by country 2022****Figure 11: Global market for organic food: Distribution of retail sales by region 2022**

Source: FiBL-AMI survey 2024, based on data from government bodies, the private sector and market research companies. For data sources, see annex, page 335.

¹ According to the Central European Bank, 1 euro corresponded to 1.0530 US dollars in 2022.

World: The countries with the largest markets for organic food 2022

Source: FiBL-AMI survey 2024

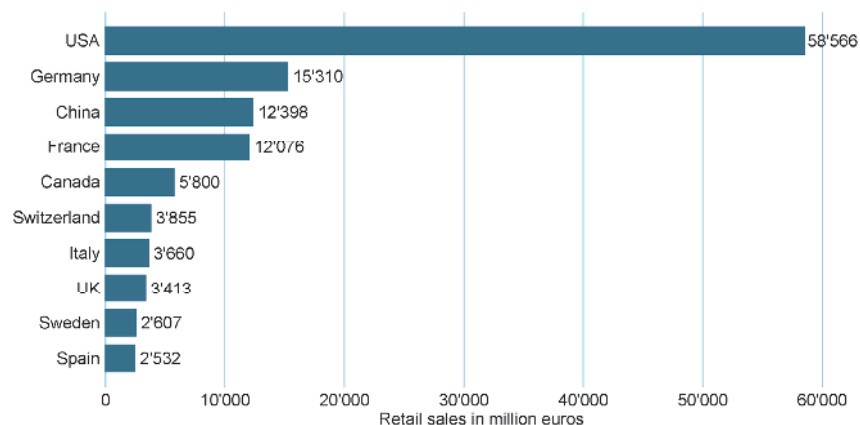


Figure 12: Global market: The countries with the largest markets for organic food 2022

Source: FiBL-AMI survey 2024, based on data from government bodies, the private sector and market research companies. For data sources, see annex, page 335.

World: The ten countries with the highest per capita consumption 2022

Source: FiBL-AMI survey 2024

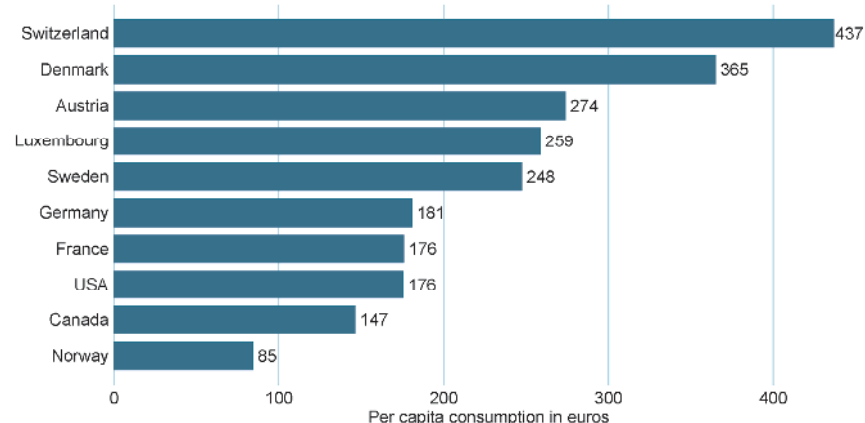


Figure 13: Global market: The ten countries with the highest per capita consumption 2022

Source: FiBL-AMI survey 2024, based on data from government bodies, the private sector and market research companies. For data sources, see annex, page 335.

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 list¹ are studied in this section.

- More than 4.0 million organic producers from the countries on this list were counted (89 percent of all organic producers).
- About a fifth of the world's organic agricultural land, 18.8 million hectares, is located in countries on this list.
- Almost half, 47 percent of the agricultural land of the countries on the DAC list is located in Asia (8.7 million hectares), with Latin America (6.6 million) and Africa (2.7 million) in second and third place.
- The countries with the largest areas of organic agricultural land are India, Argentina, China and Brazil, in that order. Not surprisingly, all of them are large countries (Figure 14).
- 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 (21.1 percent), Samoa (16.7 percent) and Dominica (11.6 percent). Argentina, with by far the largest area under organic cultivation (with 4.7 million hectares), is ranked 12 (2.7 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 about a quarter percent have an organic share higher than one percent of the total agricultural area (Figure 15).
- Land use details were available for more than 71 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 29 percent of the organic agricultural land, organic grassland/grazing over 22 percent, and organic permanent crops more 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 (in metric tons) are tropical and subtropical fruit, oilseeds (mainly soybeans), sugar, oils and fats, coffee, cereals etc. For Africa, soybeans, vegetable oils (mainly olive oil) and bananas, for Asia, oil cakes, rice and sugar, and for Latin America, banana, sugar and coffee 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>

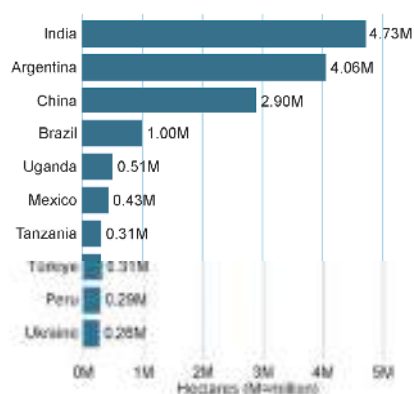
Table 6: Countries on the DAC list¹: Development of organic agricultural land 2013-2022

Region	Organic area 2012 [ha]	Area share 2012 [%]	Organic area 2017 [ha]	Area share 2017 [%]	Organic area 2022 [ha]	Area share 2022 [%]
Africa	1'145'158	0.1	1'800'862	0.2	2'732'593	0.2
Asia	3'146'877	0.2	5'848'896	0.4	8'728'631	0.6
Europe	841'733	1.1	861'048	1.0	646'862	0.7
Latin America	5'588'991	0.8	5'575'347	0.9	6'571'092	1.0
Oceania	53'350	2.5	158'846	6.9	96'227	4.2
Total	10'776'108	0.3	14'244'998	0.4	18'775'405	0.6

Source: FiBL surveys, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

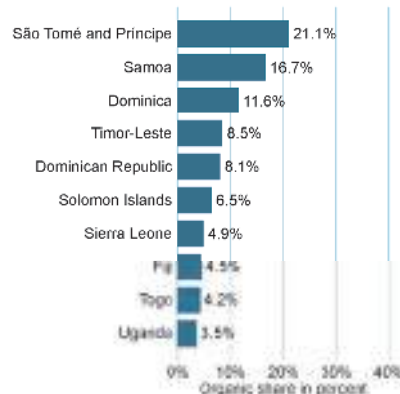
Countries on the DAC list: The ten countries with the largest areas of organic agricultural land in 2022

Source: FiBL survey 2024

**Figure 14 (left): Countries on the DAC list: The ten countries with the largest areas of organic agricultural land in 2022**

Countries on the DAC list: The ten countries with the highest organic shares of the total agricultural land in 2022

Source: FiBL survey 2024

**Figure 15 (right): Countries on the DAC list: The ten countries with the highest organic shares of the total agricultural land in 2022**

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

¹ The development is displayed for all countries, which are on the current 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

General land use information was available for 92 percent of the organic agricultural land; however, this does not mean detailed crop information is available for all areas as not all countries (e.g. Brazil and India) provided detailed crop data.^{1,2}

More than two-thirds of the 96.4 million hectares of organic agricultural land in 2022 were grassland/grazing areas (over 67.6 million hectares). The cropland area (arable land with 15.1 million hectares and permanent crops with 6.4 million hectares) constituted 21.5 million hectares, which was less than a quarter of the organic agricultural land (Table 7).

The land use information by geographical region is summarized in Figure 16 and Table 7. While in Oceania and Latin America, permanent grassland/grazing covers a large part of the organic farmland area, in Africa, permanent crops are the most important land use type. In Asia, Europe and North America, arable land is the most important.

Table 7: World: Land use in organic agriculture by 2022

Land use	Africa [ha]	Asia [ha]	Europe [ha]	Latin America [ha]	Northern America [ha]	Oceania [ha]	World [ha]
Arable land crops	926'357	3'498'356	8'383'545	604'459	1'609'910	51'406	15'074'033
Permanent crops	1'603'945	1'071'170	2'366'600	1'021'394	282'951	34'409	6'380'469
Permanent grassland	5'752	8'720	7'411'249	7'120'297	536'875	52'540'881	67'623'775
Total	2'735'006	8'830'990	18'450'355	9'537'387	3'627'818	53'194'639	96'376'196

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335. Total includes areas for which no further details were available.

The key arable crops were cereals, green fodder from arable land and oilseeds. For permanent crops, nuts, olives and coffee were the most relevant (Figure 17, Table 8, Table 9). For details, see section on arable and permanent crops on the following pages. While the arable crops decreased only by 0.7 percent and permanent crop area increased only by 0.8 percent, organic grassland/grazing areas increased significantly, by 25.5 percent (Figure 18).

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 The FAO classification 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 13, page 72). 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. 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>

World: Distribution of main land use types by region 2022

Source: FiBL survey 2024

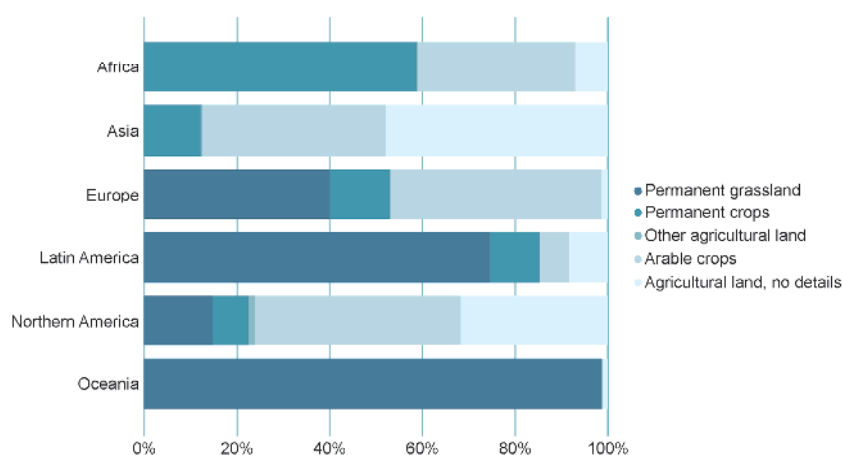


Figure 16: World: Distribution of main land use types by region 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

World: Distribution of main land use types and key crop categories 2022

FiBL survey 2024, based on information from the private sector, certifiers, and governments.

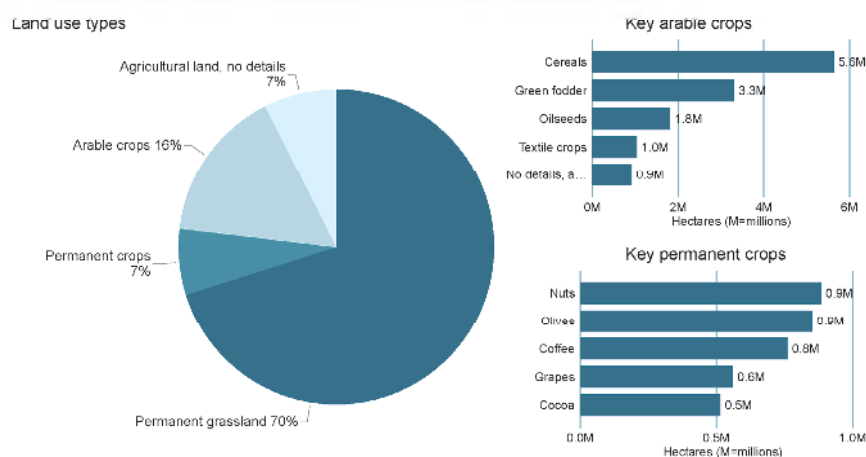


Figure 17: World: Distribution of main land use types and key crop categories 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

World: Development of organic arable land, permanent cropland and permanent grassland/grazing areas 2004 - 2022

Source: FiBL-IFOAM-IOEL surveys 2008-2023

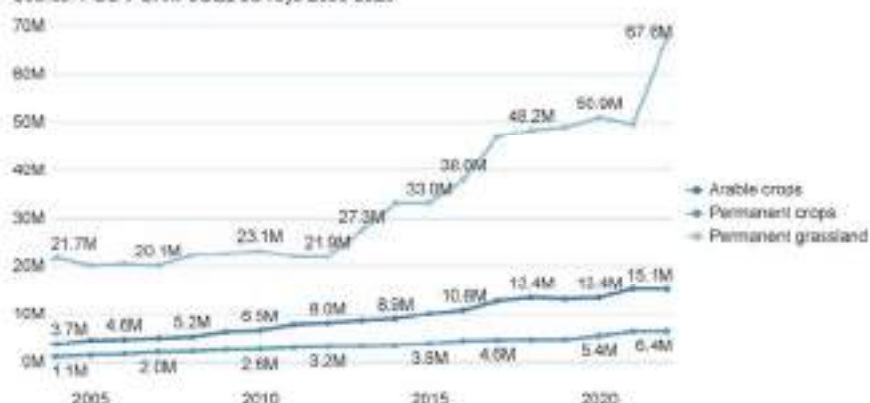


Figure 18: World: Development of organic farmland by land use 2004-2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Arable land

With a total of more than 15.1 million hectares, organic arable land constituted 15.6 percent of the world's organic agricultural land and 1.1 percent of the world's arable cropland.

Compared to 2021, organic arable land decreased by 0.7 percent.

Almost 56 percent of the arable land was located in Europe, followed by Asia (23 percent) and Northern America (11 percent) (Figure 19). Most of the arable cropland was used for cereals (including rice, 5.6 million hectares), green fodder (3.3 million hectares) and oilseeds (1.8 million hectares) (Figure 20 and Table 8).

Permanent crops

Permanent crops accounted for more than 6.4 million hectares, which is 3.6 percent of the world's permanent cropland. Compared with 2021, slight increase of more than 48'000 hectares, or 0.8 percent, was reported.

Seven percent of the organic agricultural land was permanent cropland.

Most of the permanent cropland was in Europe (almost 2.4 million hectares), followed by Africa (over 1.6 million hectares) and Asia (almost 1.1 million hectares) (Figure 21; Figure 22 and Table 9).

Table 8: Use of organic arable land 2013, 2021 and 2022 compared

Crop group	Organic area 2022 [ha]	Share of total 2022 [%]	1-year change [ha]	1-year change [%]	10-year change [ha]	10-year change [%]
Cereals	5'641'202	0.8	-118'925.3	-2.1	2'129'413.3	60.6
Dry pulses	740'306	0.8	-61'262.3	-7.6	417'747.6	129.5
Oilseeds	1'822'606	0.7	-326'168.1	-15.2	952'016.4	109.4
Plants harvested green	3'313'912	7.7	40'084.5	1.2	882'407.6	36.3
Root crops	203'654	0.3	31'640.5	18.4	151'077.2	287.3
Sugarcane	107'926	0.4	-7'563.8	-6.5	38'637.5	55.8
Textile crops	1'043'294	2.9	59'341.9	6.0	952'202.3	1'045.3
Vegetables	503'456	0.8	40'845.7	8.8	210'175.1	71.7
Total	15'074'033	1.1	-102'367.0	-0.7	6'553'852.0	76.9

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. Total includes unspecified arable land. For detailed data sources, see annex, page 335.

Table 9: Use of organic permanent cropland 2013, 2021 and 2022 compared

Crop group	Organic area 2022 [ha]	Share of total 2022 [%]	1-year change [ha]	1-year change [%]	10-year change [ha]	10-year change [%]
Berries	87'517	14.6	-18'571.7	-17.5	43'005.6	96.6
Citrus fruit	115'346	1.1	-3'955.1	-3.3	34'111.2	42.0
Cocoa	515'214	4.4	46'142.9	9.8	292'617.9	131.5
Coconut	289'420	2.6	-20'198.1	-6.5	230'764.1	393.4
Coffee	761'424	6.7	-163'257.0	-17.7	55'459.6	7.9
Fruit, temperate	331'605	2.8	18'768.6	6.0	128'037.0	62.9
Fruit, tropical and subtropical	295'133	1.0	-35'895.2	-10.8	80'531.6	37.5
Grapes	561'503	8.3	17'619.4	3.2	245'125.3	77.5
Medicinal/aromatic plants	223'969	9.9	100'554.3	81.5	189'806.2	555.6
Nuts	885'017	5.7	26'483.3	3.1	570'280.3	181.2
Olives	852'649	8.2	-84'410.7	-9.0	240'381.1	39.3
Tea/mate, etc.	248'003	4.5	38'364.9	18.3	160'460.2	183.3
Total	6'380'469	3.6	48'140.5	0.8	3'124'767.3	96.0

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. Total includes unspecified permanent cropland. For detailed data sources, see annex, page 335.

Table 10: Use of organic arable and permanent cropland 2013, 2021 and 2022 compared

Crop group	Organic area 2022 [ha]	Share of total 2022 [%]	1-year change [ha]	1-year change [%]	10-year change [ha]	10-year change [%]
Arable & permanent crops	21'454'502	1.4 %	-54'226.5	-0.3 %	9'678'619.2	82.2 %

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

World: Distribution of organic arable cropland by region 2022

Source: FiBL survey 2024

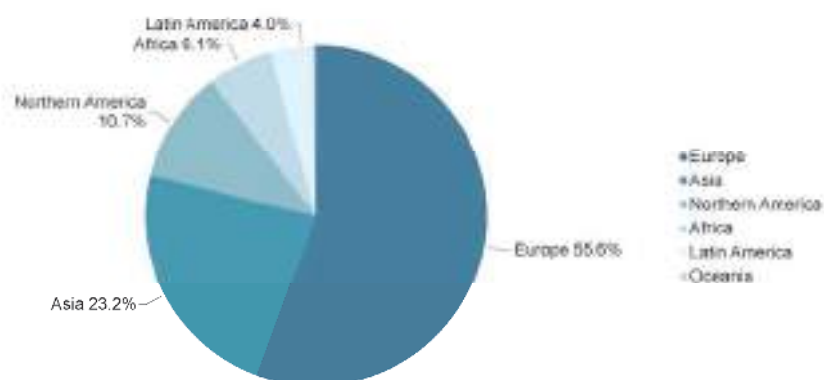


Figure 19: World: Distribution of organic arable cropland by region 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

World: Distribution of organic arable cropland by crop group 2022

Source: FiBL survey 2023

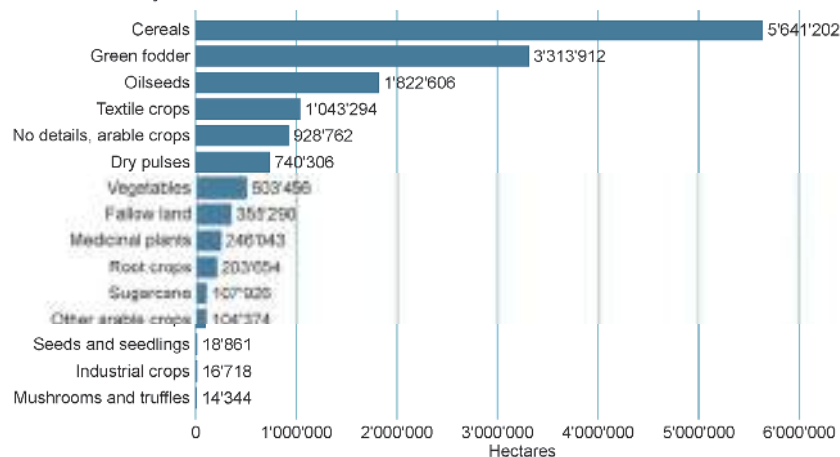


Figure 20: World: Use of arable cropland by crop group 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

World: Distribution of organic permanent cropland by region 2022

Source: FiBL survey 2024

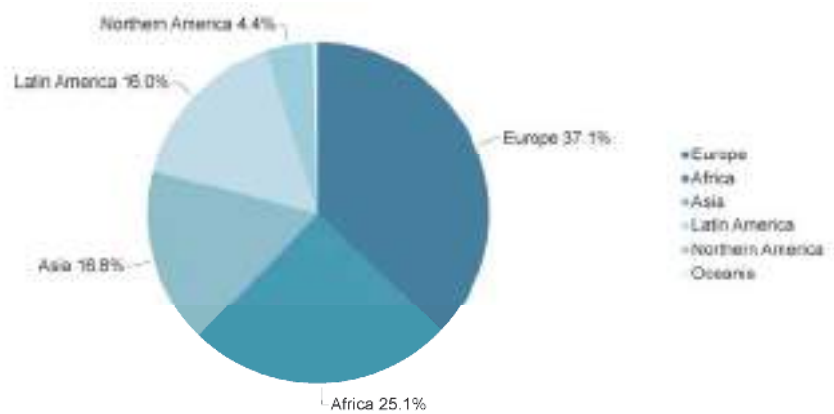


Figure 21: World: Distribution of permanent cropland by region 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

World: Distribution of organic permanent cropland by crop group 2022

Source: FiBL survey 2024

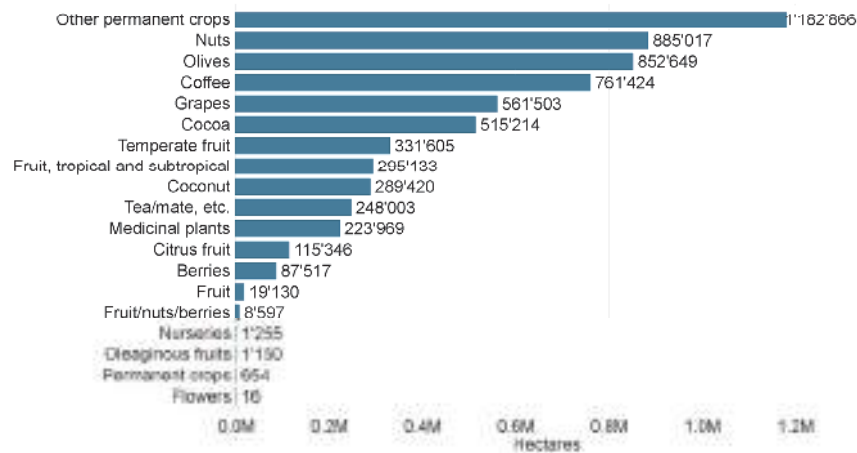


Figure 22: World: Use of permanent cropland by crop group 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Wild collection and beekeeping areas

The collection of wild-harvested crops is defined in the IFOAM Norms (IFOAM 2014), and wild collection activities are regulated by organic laws. A collection area (including beekeeping) of 34.6 million hectares was reported in 2022. The organic wild collection areas are concentrated in Africa, Europe, Asia and Latin America (Figure 23 and Table 11); 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 India and Zambia (Figure 24). Medicinal and aromatic plants play the most important role (Table 12). Unfortunately, no details were available for most of the wild collection areas.

Table 11: Wild collection and beekeeping areas by region 2021 and 2022 compared

Region	2021 [ha]	2022 [ha]	Change 2021-2022 [ha]	Change 2021-2022 [%]
Africa	12'693'397	10'711'955	-1'981'442.6	-15.6
Asia	3'815'281	7'053'415	3'238'134.6	84.9
Europe	10'585'464	11'305'648	720'183.9	6.8
Latin America	2'377'015	5'338'894	2'961'878.6	124.6
Northern America	7'810	163'942	156'131.7	1'999.0
Oceania	121'794	60'633	-61'161.1	-50.2
World	29'600'762	34'634'487	5'033'725.0	17.0

Source: FiBL survey 2024, based on data from governments, the private sector, and certifiers.
For detailed data sources, see annex, page 335.

Table 12: Wild collection and beekeeping areas by crop group 2021 and 2022

Land use/Product	Area [ha] 2021	Area [ha] 2022
Bee pastures	2'514'809	2'506'548
Berries, wild collection	258'225	745'604
Coffee, wild collection	6'442	7'956
Forest products	2'009	2'000
Fruit, wild collection	2'004'982	178'711
Marula, wild collection	10'000	78'349
Medicinal and aromatic plants, wild collection	3'204'305	3'260'144
Mushrooms, wild collection		50'088
Nuts, wild collection	1'656'674	5'015'535
Oil plants, wild collection	35'877	1'514
Palmito, wild collection	56'699	56'699
Permanent crops, wild collection, other	15'138	15'139
Rose hips, wild collection	2'425'519	1'042'535
Seaweed	211'328	325'261
Wild collection, no details	17'198'756	21'348'404
Total	29'600'762	34'634'487

Source: FiBL survey 2024, 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 335.
Please be aware that some countries may experience double counting of areas

For detailed data on wild collection and beekeeping areas, please refer to the tables provided in the Annex, section 1.6 Use of organic areas: Wild collection, beehives, aquaculture and crops, page 288.

World: Distribution of organic wild collection and beekeeping areas by region in 2022

Source: FiBL survey 2024

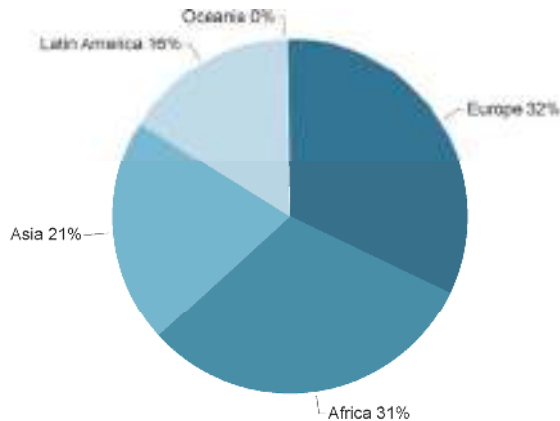


Figure 23: World: Distribution of organic wild collection and beekeeping areas by region in 2022

Source: FiBL survey 2024, based on data from government bodies, the private sector and certifiers. For detailed data sources, see annex, page 335.

World: The ten countries with the largest organic wild collection and beekeeping areas in 2022

Source: FiBL survey 2024

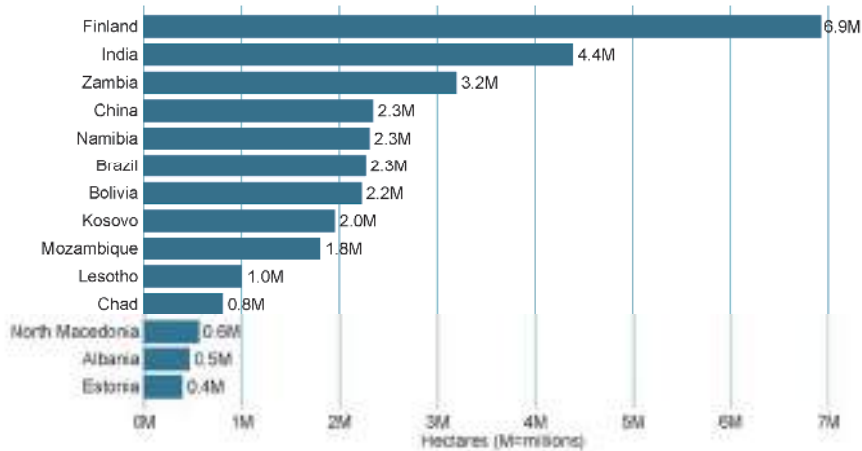


Figure 24: World: The ten countries with the largest organic wild collection and beekeeping areas in 2022

Source: FiBL survey 2024, based on data from government bodies, the private sector, and certifiers. For detailed data sources, see annex, page 335. Please be aware that some countries may experience double counting of areas.

Beehives

There were almost 3.41 million organic beehives in 2022, representing 3.4 percent of the world's beehives.¹ Organic beehives are concentrated in Latin America (36.6 percent) and Europe (31.5 percent) (Figure 25). The country with the largest number of organic beehives was Zambia (approximately 758'000), followed by Brazil (almost 630'000) and Mexico (more than 448'000) (Figure 25). The total number has increased more than 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 2022

Source: FiBL survey 2024

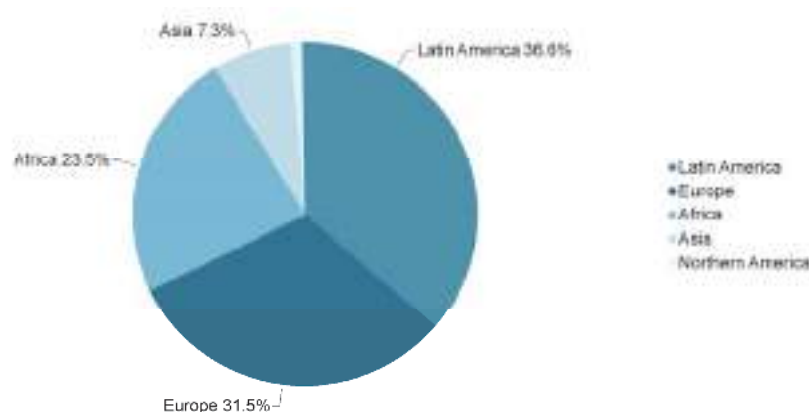


Figure 25: World: Distribution of organic beehives by region in 2022

Source: FiBL survey 2024, based on data from government bodies, the private sector, and certifiers. For detailed data sources, see annex, page 335.

¹ According to FAO, there were 100'996'303 beehives in 2022. The FAOSTAT website > Production > Live animals at <http://www.fao.org/faostat/en/#data/QA>

Aquaculture

A production volume of more than 330'000 metric tons of organic aquaculture was reported in 2022.

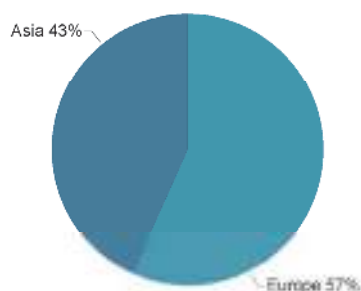
- According to the available data, aquaculture production is evenly divided between Europe (57 percent, mainly Norway, Ireland and Italy) and Asia (43 percent, mainly China).
- The largest production volume was found in China (140'091 metric tons; however, without breakdown by species), followed by Norway (54'411 metric tons) (Table 40 and Figure 26).

Unfortunately, some countries with 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 (45'201 metric tons), followed by mussels (39'446 metric tons) and sea bass (4'027 metric tons) (Table 39).

World: Organic aquaculture production volume: Distribution by continent 2022

Source: FiBL survey 2024



World: The ten countries with the largest aquaculture production volume 2022

Source: FiBL survey 2023

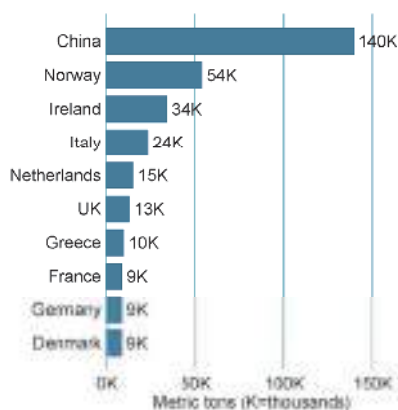
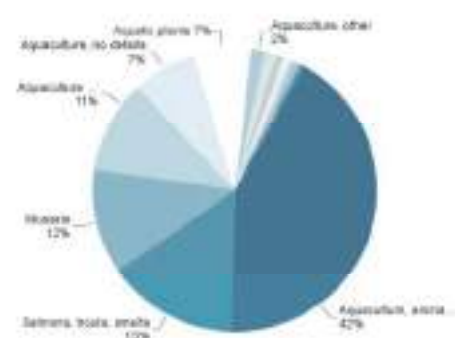


Figure 26: World: Organic aquaculture production volume: Distribution by continent and top 10 countries 2022

Source: FiBL-survey 2024; based on national data sources and certifier data. For detailed data sources, see annex, page 335.

World: Organic aquaculture production volume: Distribution by species 2022

Source: FiBL survey 2024



World: Key organic aquaculture species by production volume 2022

Source: FiBL survey 2024

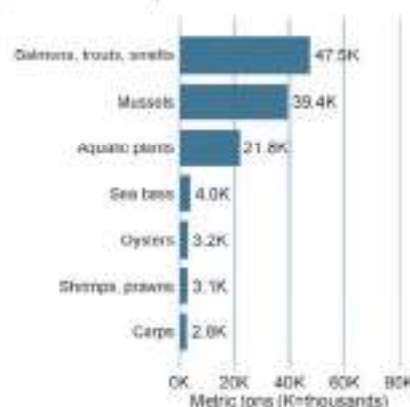


Figure 27: World: Organic aquaculture production volume: Distribution by species and key species 2022

Source: FiBL-survey 2024; based on national data sources and certifier data. For detailed data sources, see annex, page 335.

References and further reading

- European Market Observatory for fisheries and aquaculture (EUMOFA) (2022): Organic Aquaculture in the EU. European Commission, Brussels. Available at https://www.eumofa.eu/documents/20178/432372/Organic%20aquaculture%20in%20the%20EU_final%20report_ONLINE.pdf
- 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 <https://www.iisd.org/publications/state-sustainability-initiatives-review-standards-and-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 ten 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 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 13: World: Selected key crop groups and crops area in organic agriculture 2022 (overview including conversion areas)

Crop	Africa [ha]	Asia [ha]	Europe [ha]	Latin America [ha]	North America [ha]	Oceania [ha]	Total [ha]
Cereals	31'370	1'807'067	2'911'927	143'711	705'834	41'293	5'641'202
Citrus fruit	6'534	13'554	61'212	28'565	5'479	1	115'346
Cocoa	312'857	1'597		200'760			515'214
Coffee	264'488	72'005		421'965	196	2'770	761'424
Dry pulses	2'314	24'262	539'553	22'227	151'950		740'306
Fruit temperate	5'708	127'542	166'941	12'598	18'815		331'605
Fruit, tropical/ subtropical	98'425	43'901	46'065	102'446	4'125	172	295'133
Grapes	6'151	19'651	490'548	20'833	18'535	5'783	561'503
Oilseeds	264'487	611'075	694'774	57'038	195'232		1'822'606
Olives	180'199	5'982	656'995	8'807	666		852'649
Vegetables	41'278	78'394	215'460	50'307	114'007	4'010	503'456

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

For detailed data crop groups, please refer to the tables provided in the Annex, section 1.6.4 Crops, page 292.

› Cereals

In 2022, more than 5.6 million hectares or 0.75 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

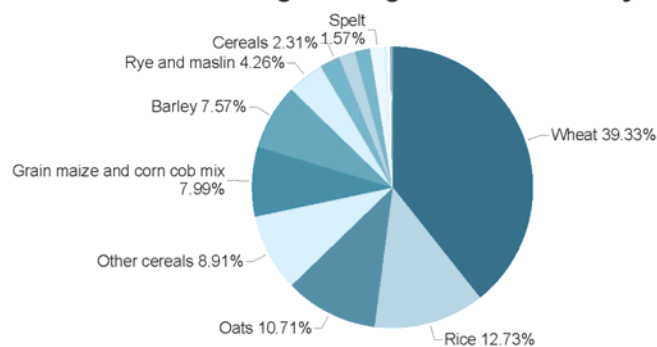
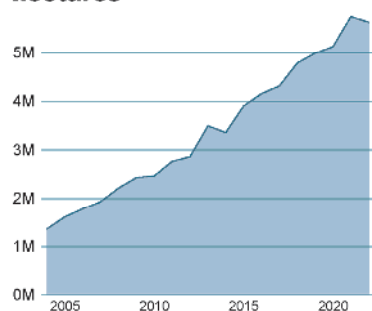
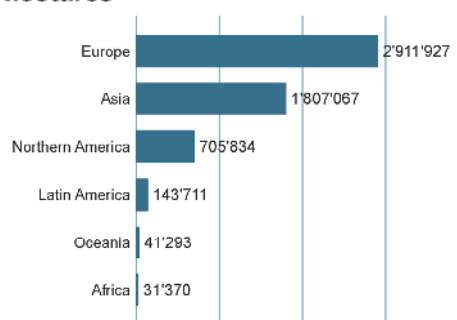
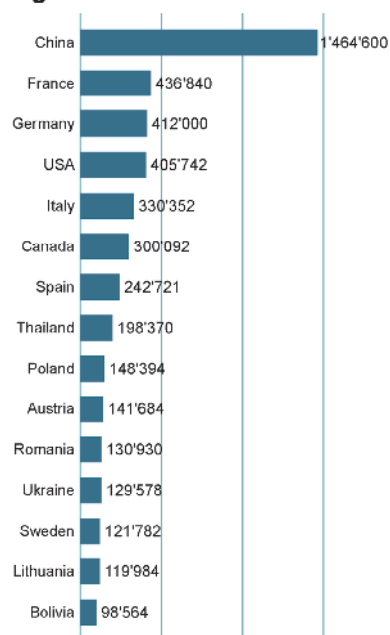
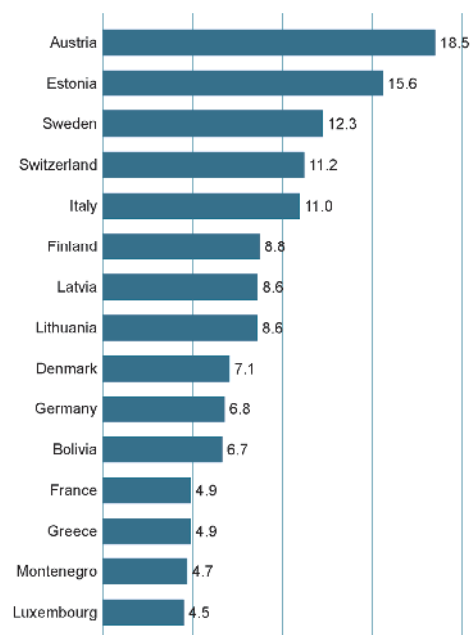


Figure 28: Cereals: Organic area 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

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

The development of the organic cereal area in million hectares**Organic cereal area by continent in hectares****The countries with the largest organic area in hectares****The countries with the highest organic cereal area share in %****Figure 29: Cereals: Organic area 2022**

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

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

› Citrus fruit

In 2022, over 115'000 hectares or 1.2 percent of the global citrus fruit area was under organic management.

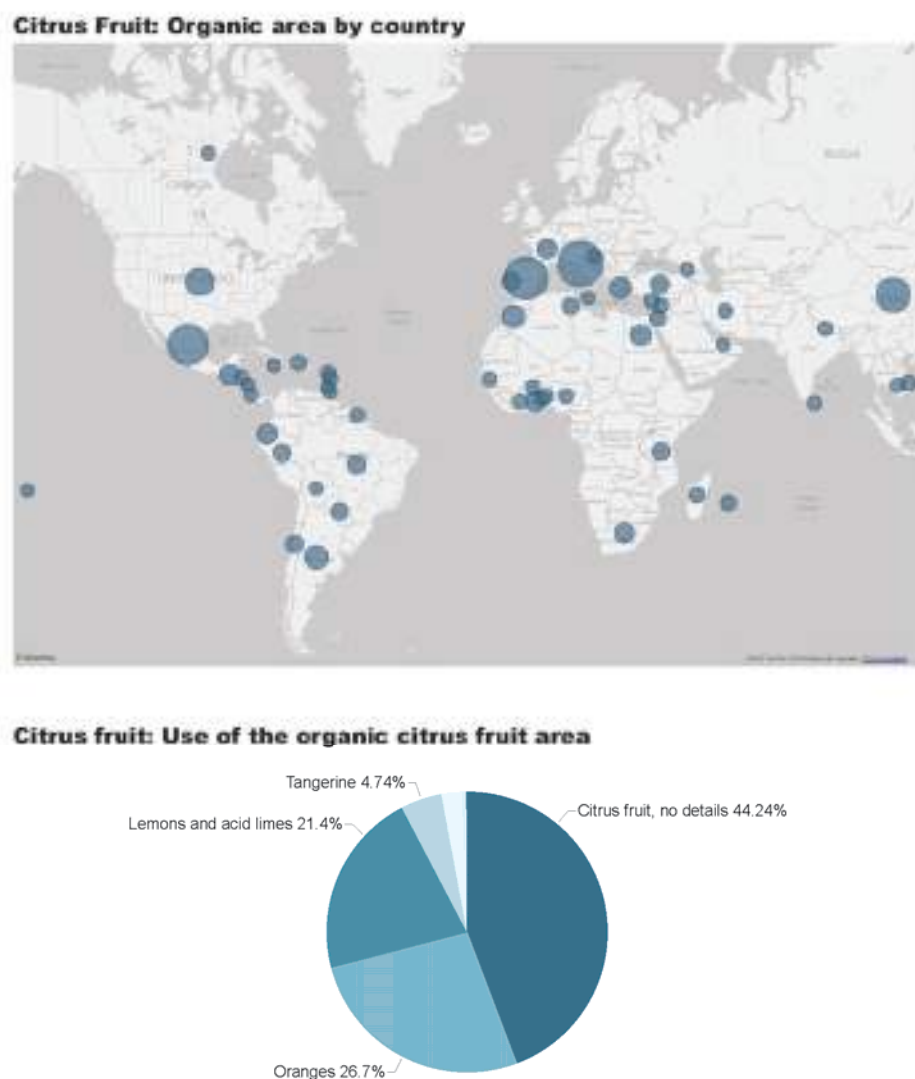
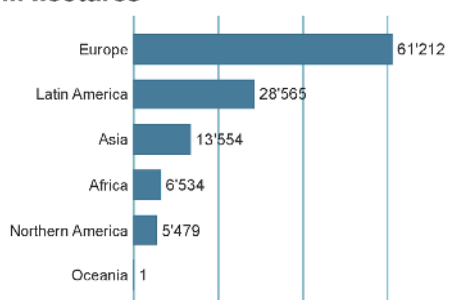
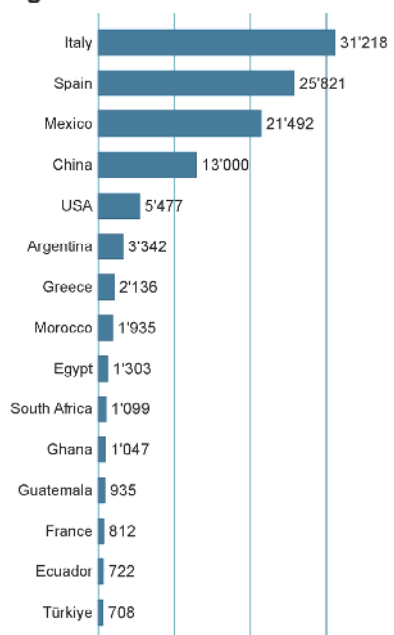
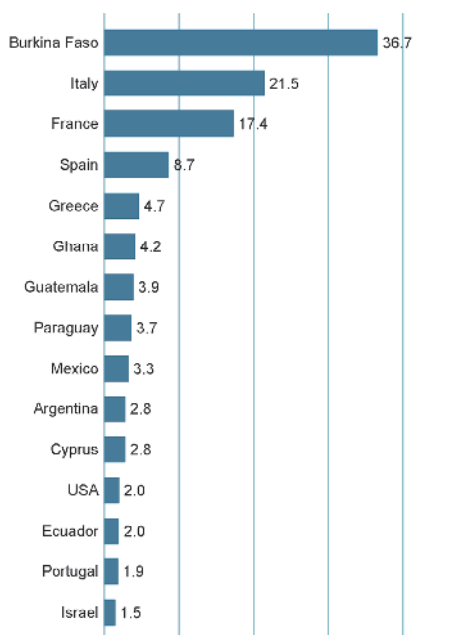


Figure 30: Citrus fruit: Organic area 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. Online at <https://statistics.fibl.org/visualisation.html>

More details about organic citrus fruit can be found in the article by Garibay and Bernet on page 95.

The development of the organic citrus fruit area in thousand hectares**Organic citrus fruit area by continent in hectares****The countries with the largest organic area in hectares****The countries with the highest organic area share in %****Figure 31: Citrus fruit: Organic area 2022**

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

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

› **Cocoa beans**

In 2022, around 515'000 hectares or 4.4 percent of the global cocoa area was under organic management.

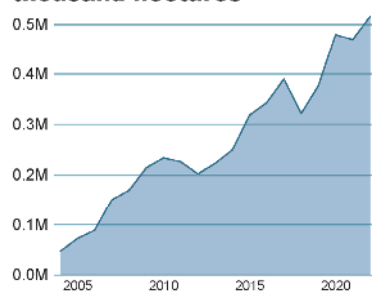


Figure 32: Cocoa: Organic area 2022

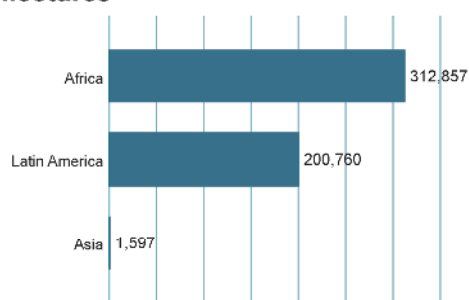
Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

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

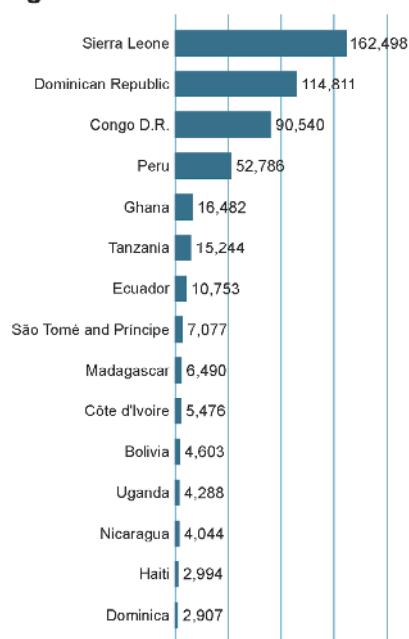
The development of the organic cocoa area in thousand hectares



Organic cocoa area by continent in hectares



The countries with the largest organic area in hectares



The countries with the highest organic cocoa area share in %

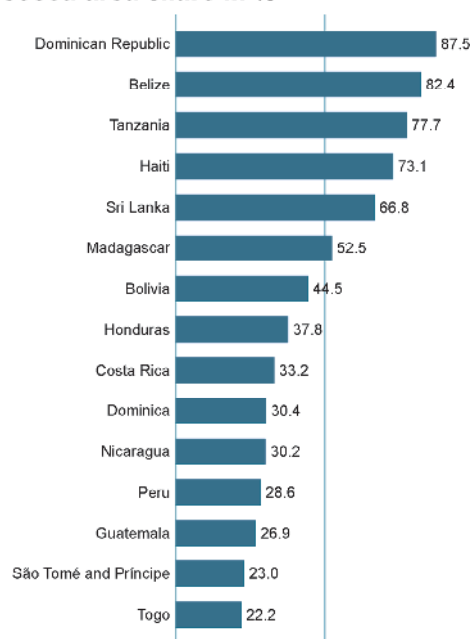


Figure 33: Cocoa: Organic area 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

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

› **Coffee**

In 2022, over 761'000 hectares or 6.7 percent of the global coffee area was under organic management.

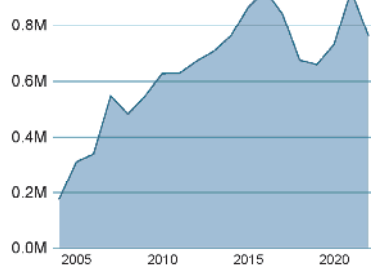


Figure 34: Coffee: Organic area 2022

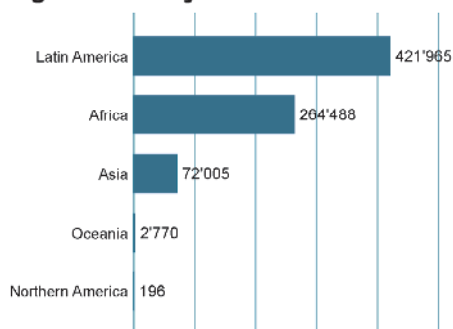
Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

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

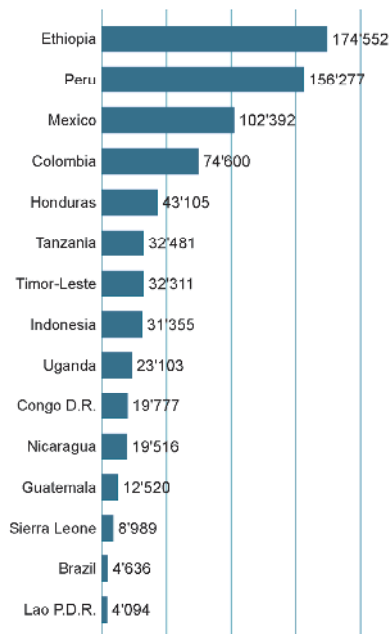
The development of the organic coffee area in million hectares



Organic area by continent in hectares



The countries with the largest organic area in hectares



The countries with the highest organic coffee area share in %

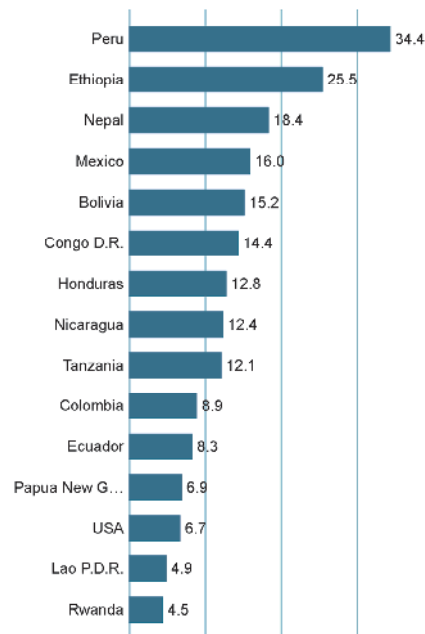


Figure 35: Coffee: Organic area 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

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

› Dry pulses

In 2022, around 740'000 hectares or 0.8 percent of the global dry pulses area was under organic management.

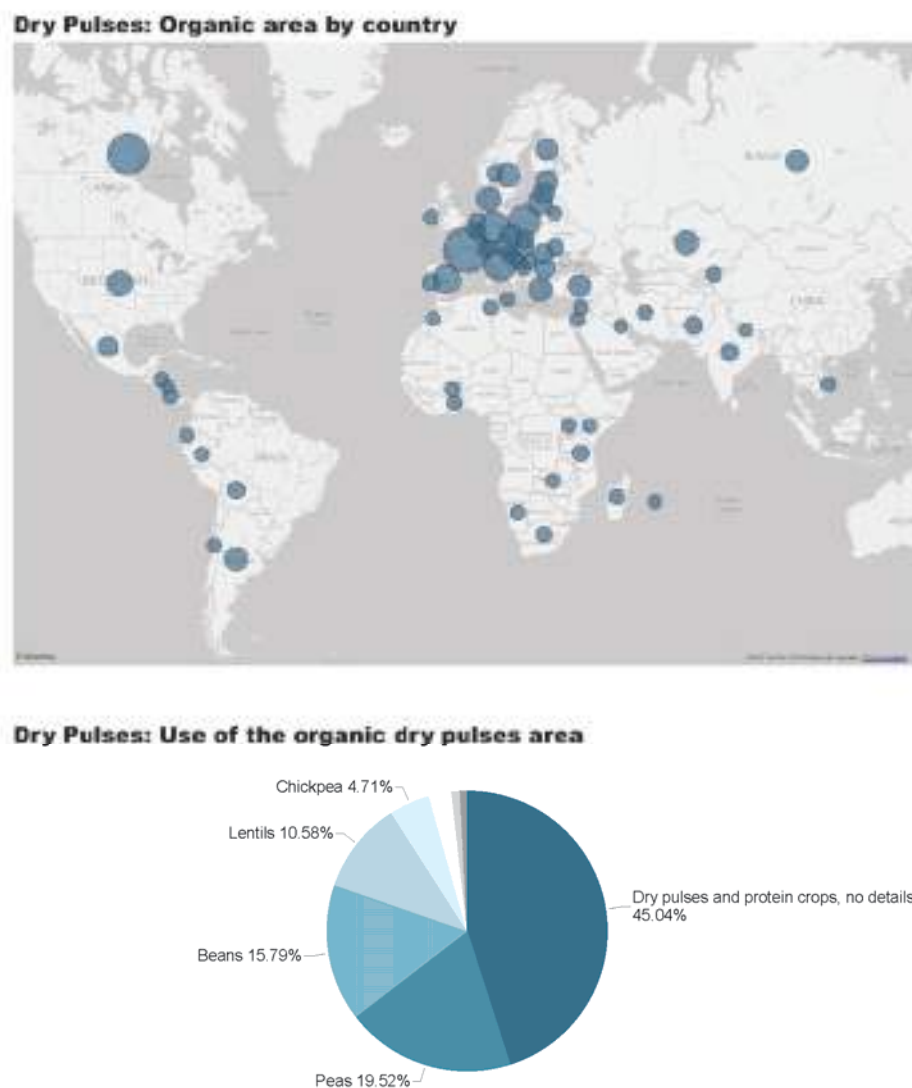
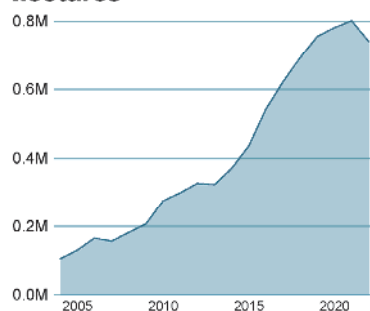


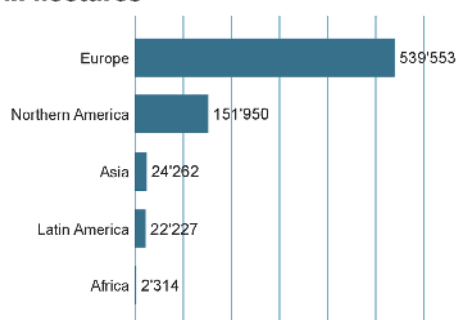
Figure 36: Dry Pulses: Organic area 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. Online at <https://statistics.fibl.org/visualisation.html>

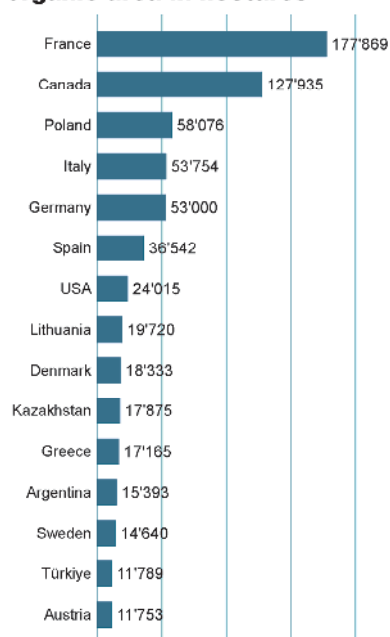
The development of the dry pulses area in million hectares



Organic dry pulses area by continent in hectares



The countries with the largest organic area in hectares



The countries with the highest organic area share in %

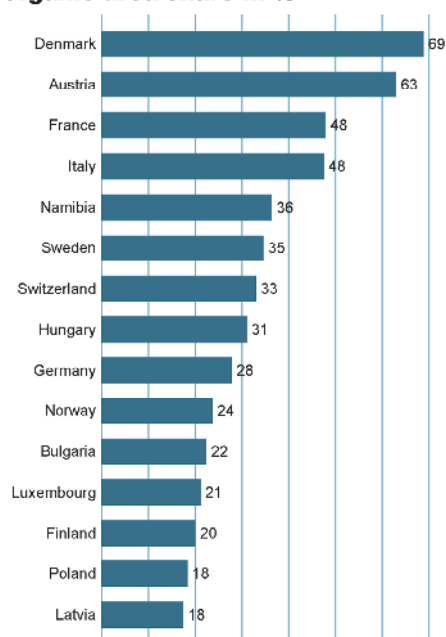


Figure 37: Dry Pulses: Organic area 2022

Source: FiBL survey 2024 based on information from the private sector, certifiers, and governments.

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

Temperate Fruit

In 2022, almost 332'000 hectares or 2.8 percent of the global temperate fruit area was under organic management.

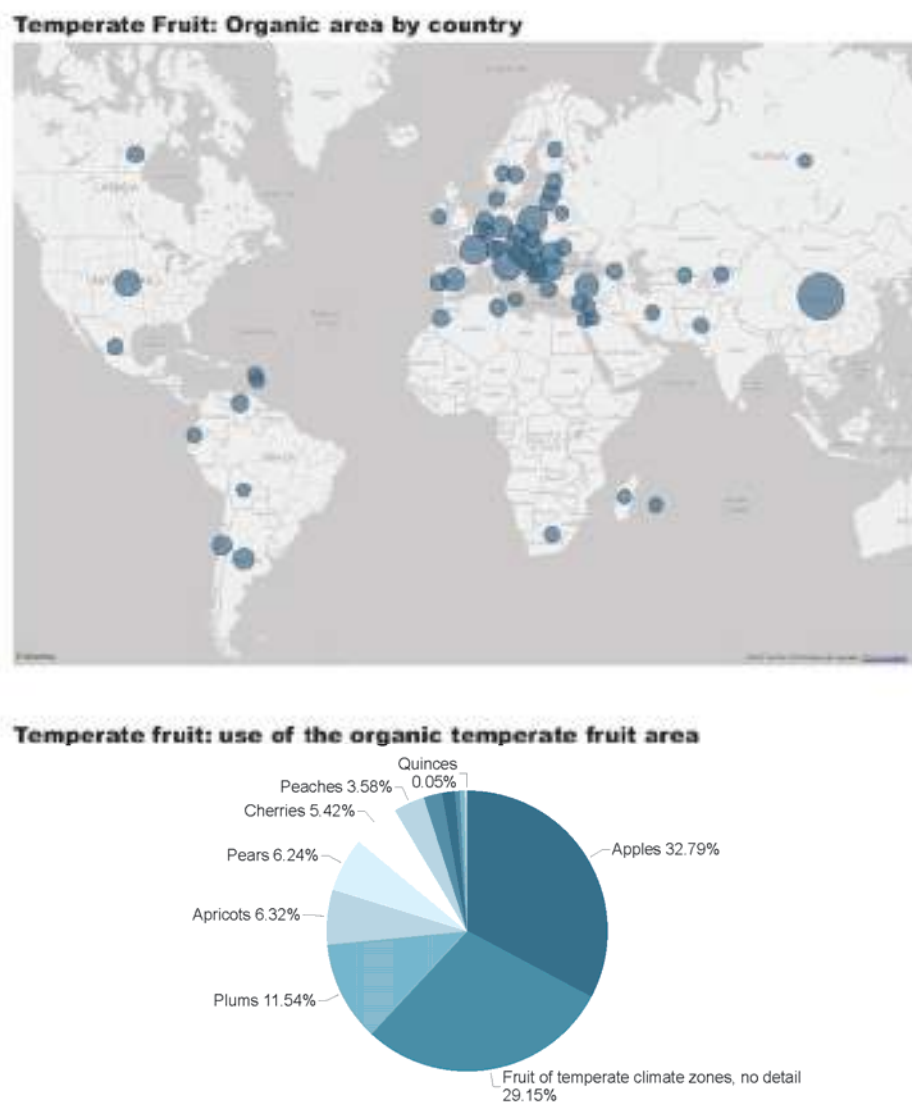
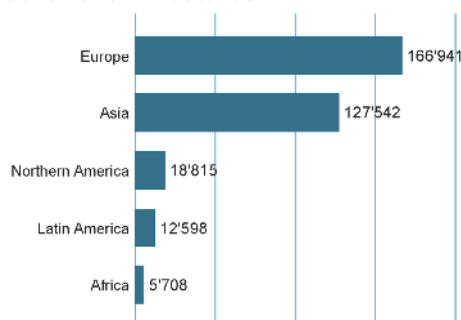
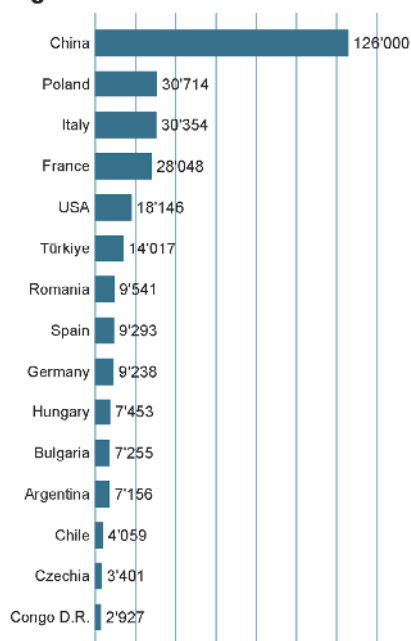
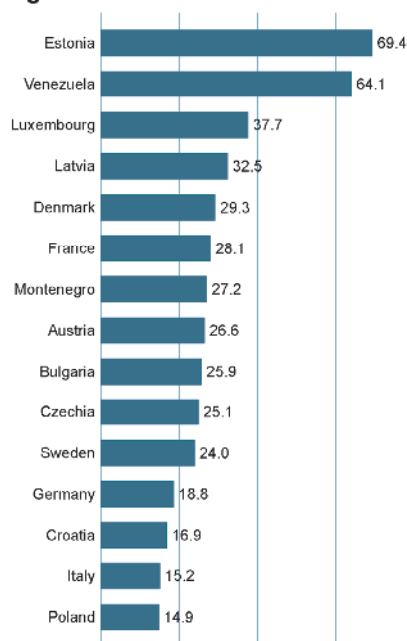


Figure 38: Temperate fruit: Organic area 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

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

The development of the temperate fruit area in thousand hectares**Organic temperate fruit area by continent in hectares****The countries with the largest organic area in hectares****The countries with the highest organic area share in %****Figure 39: Temperate Fruit: Organic area 2022**

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

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

› Fruit: Tropical and subtropical fruit

In 2022, around 295'000 hectares or 1 percent of the global tropical and subtropical fruit area was under organic management.

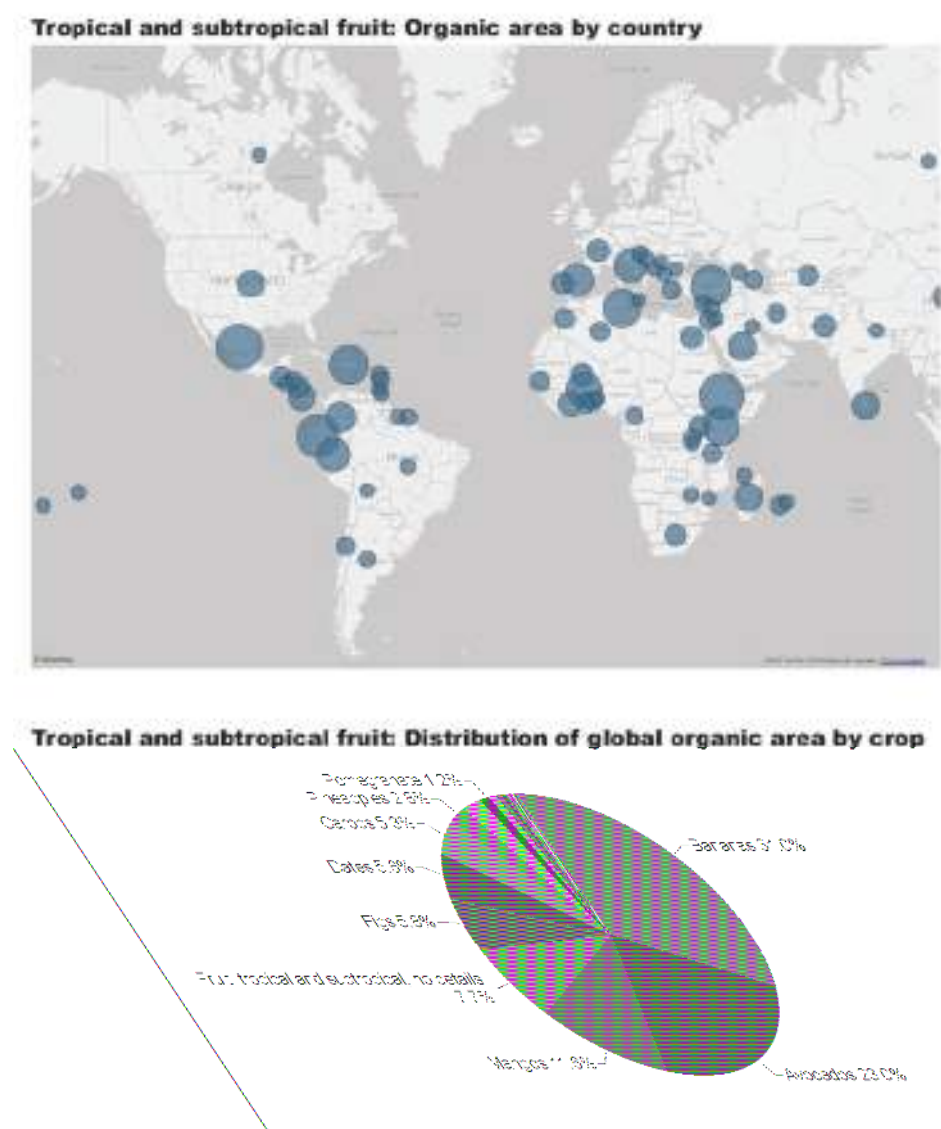
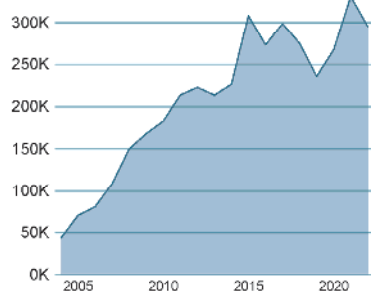


Figure 40: Tropical and subtropical fruit: Organic area 2022

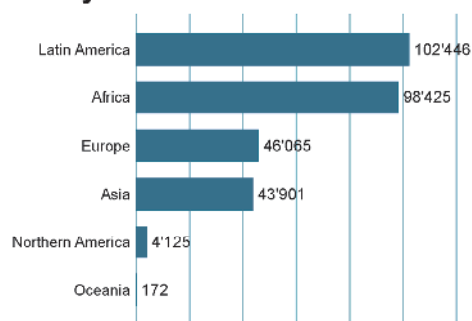
Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

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

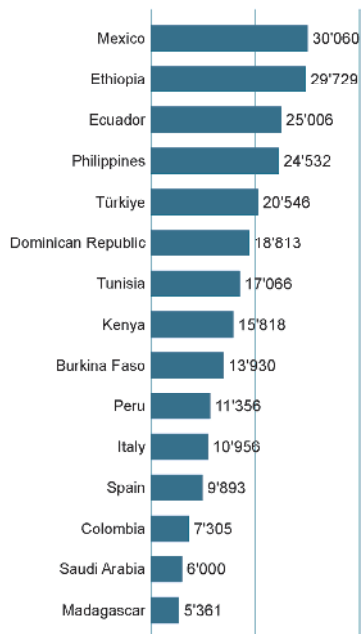
The development of the tropical and subtropical fruit area in thousand hectares



Organic tropical and subtropical fruit area by continent in hectares



The countries with the largest organic area in hectares



The countries with the highest organic area share in %

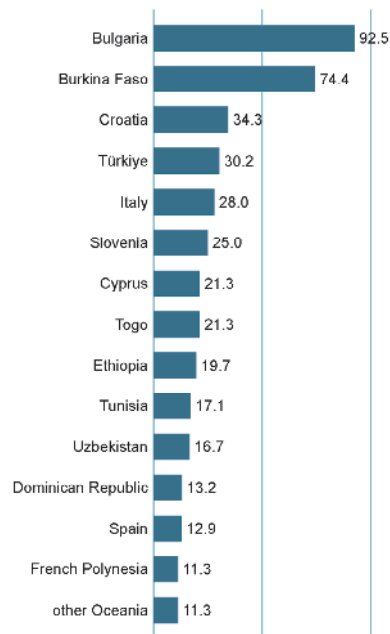


Figure 41: Tropical and subtropical fruit: Organic area 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

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

› **Grapes**

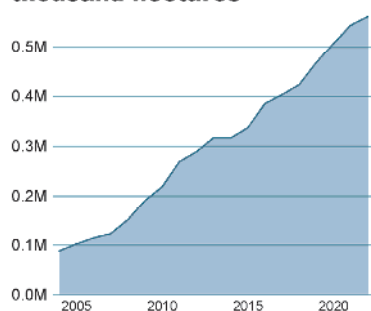
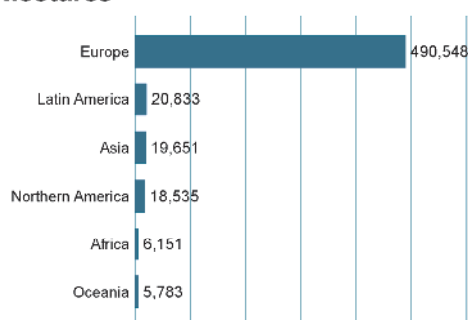
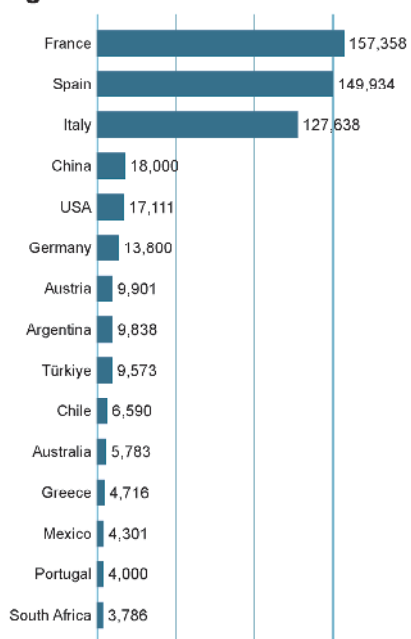
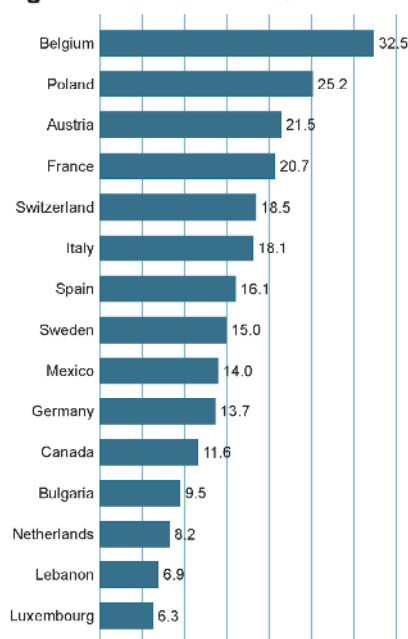
In 2022, almost 562'000 hectares or 8.3% of the global grape area was under organic management.



Figure 42: Grapes: Organic area 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

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

The development of the organic grape area in thousand hectares**Organic grapes area by continent in hectares****The countries with the largest organic area in hectares****The countries with the highest organic area share in %****Figure 43: Grapes: Organic area 2022**

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

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

› Oilseeds

In 2022, around 1'820'000 hectares or 0.7 percent of the global oilseeds area was under organic management.

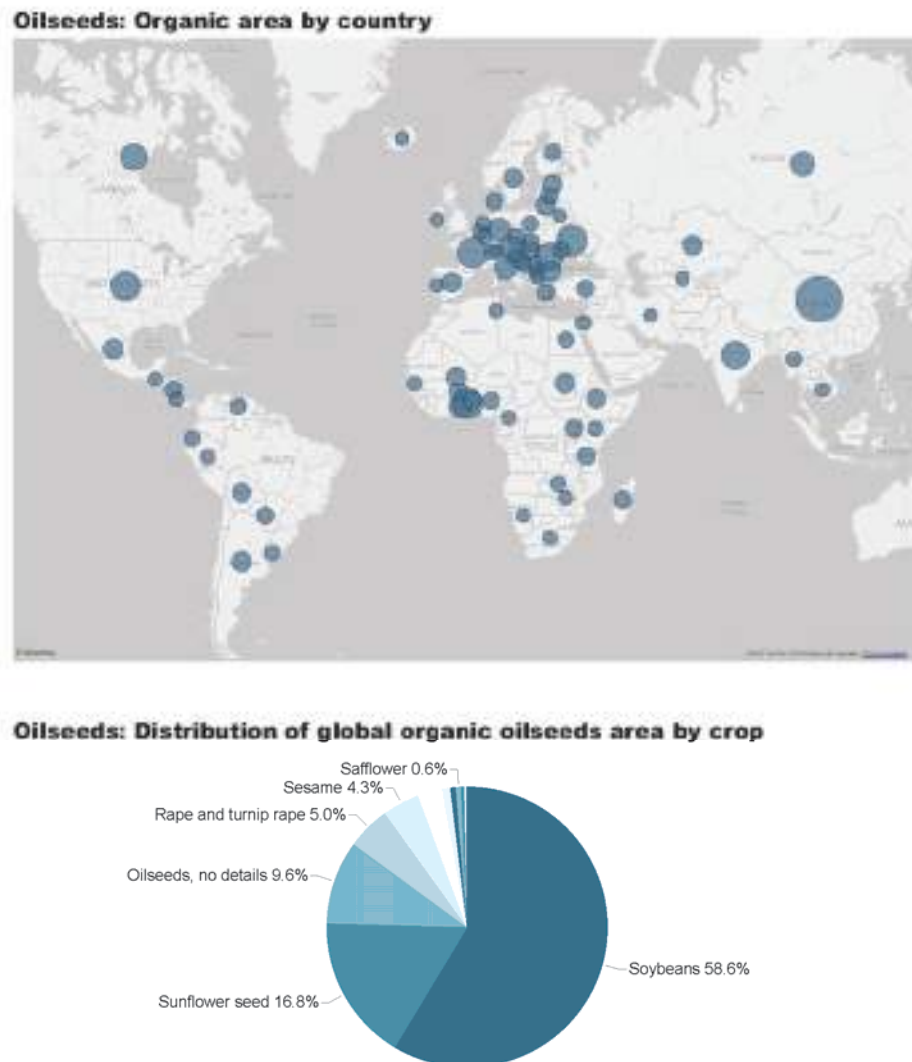
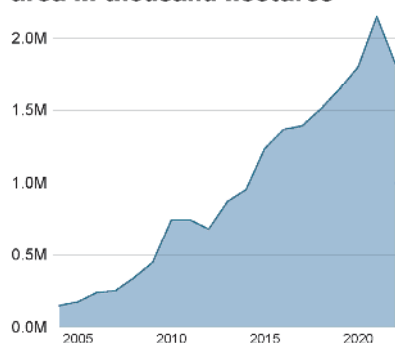
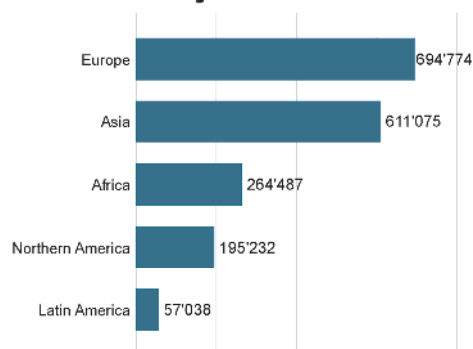
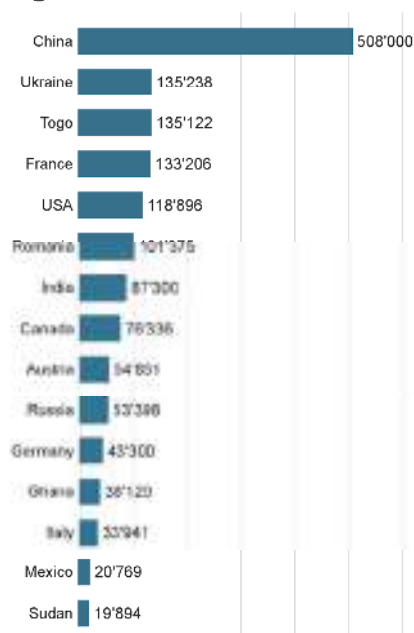
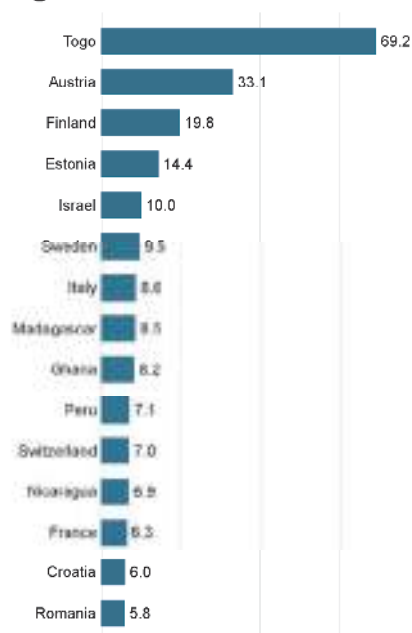


Figure 44: Oilseeds: Organic area 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

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

The development of the oilseed area in thousand hectares**Oilseeds area by continent in hectares****The countries with the largest organic area in hectares****The countries with the highest organic area share in %****Figure 45: Oilseeds: Organic area 2022**

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. Online at <https://statistics.fibl.org/visualisation.html>¹

¹ Kemper et al. (Eds.) (2023) The State of Sustainable Markets 2023: 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**

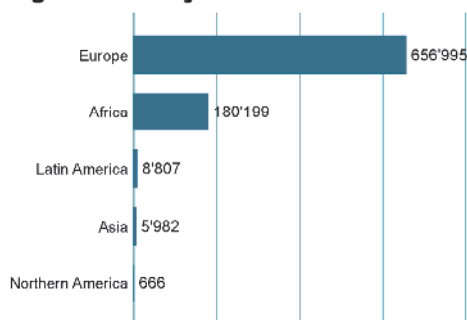
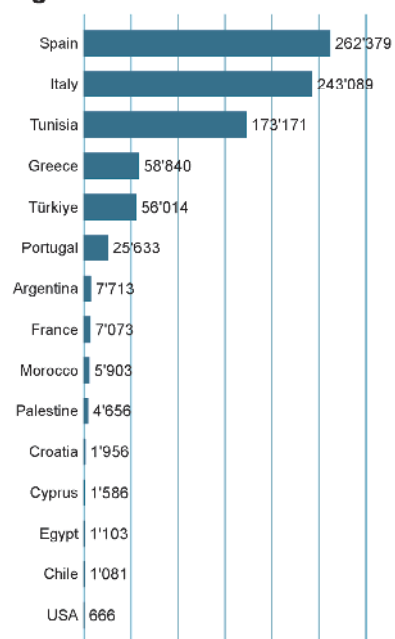
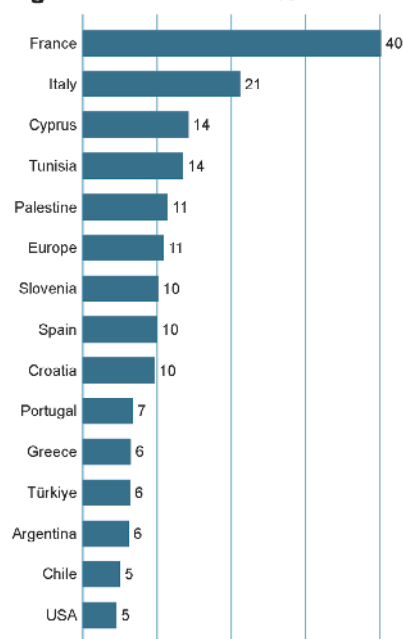
In 2022, almost 853'000 hectares or 8.2 percent of the global olive area was under organic management.



Figure 46: Olives: Organic area 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

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

The development of the organic olive area in million hectares**Organic area by continent in hectares****The countries with the largest organic area in hectares****The countries with the highest organic area share in %****Figure 47: Olives: Organic area 2022**

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

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

› Vegetables

In 2022, around 503'000 hectares or 0.8 percent of the global vegetable area was under organic management.



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

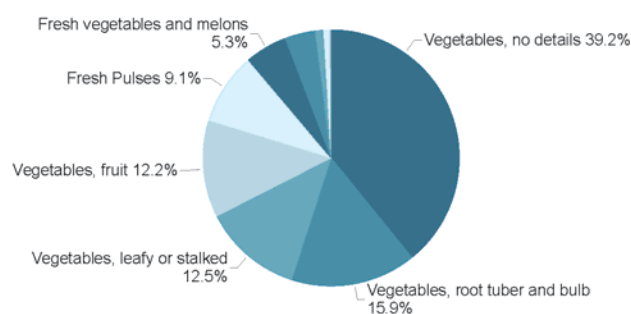
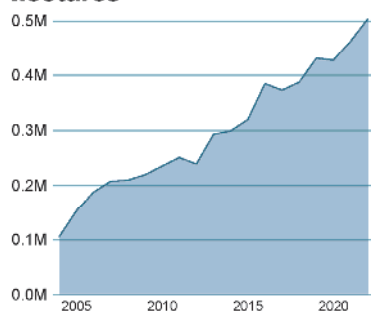


Figure 48: Vegetables: Distribution of organic area by crop group 2022

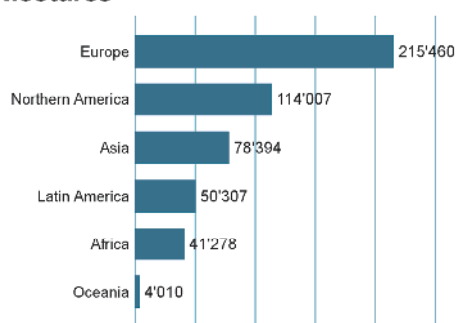
Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

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

Development of the organic vegetable area in thousand hectares



Vegetable area by continent in hectares



The countries with the largest organic area in hectares



The countries with the highest organic area share in %

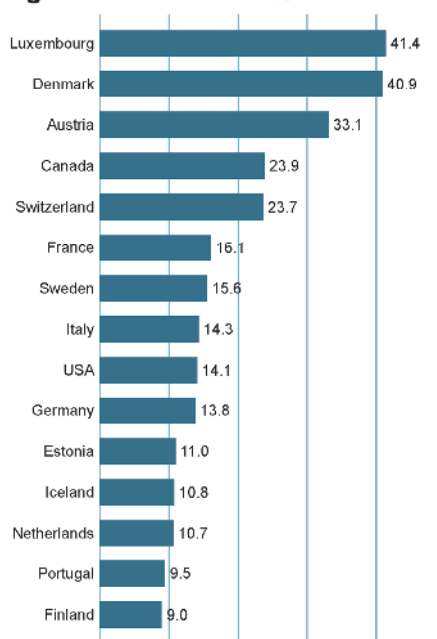


Figure 49: Vegetables: Organic area 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

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

Organic Citrus Fruits

SALVADOR V. GARIBAY¹ AND THOMAS BERNET²

Organic production area

While organic citrus fruit production may not reach the levels seen in other organic sectors, such as olives, coffee, or cocoa, there has been significant growth in the number of hectares dedicated to organic citrus production over the past 20 years. Between 2004 and 2022, the organic citrus acreage expanded by more than 86'000 hectares. In 2022, over 115'000 hectares of citrus fruits were grown organically worldwide, constituting 1.1 percent of the world's total citrus area of 10.6 million hectares (according to FAOSTAT).

However, in 2022, there was a decline in organic citrus production, with a decrease of 3.3% (-3'955 hectares) in organic acreage compared to 2021. These declines in organic citrus production areas have been observed since 2005, particularly following a peak increase. One potential factor contributing to this trend could be the impact of citrus greening disease, which has been devastating for citrus trees.

In essence, this decline may represent an attempt to offset reduced tree productivity or tree mortality, aimed at meeting the demand for fresh citrus fruit, particularly in the juice markets of the European Union and the United States (see Table 15, page 96).

In 2022, the organic citrus production landscape included oranges (comprising over 27 percent of organic citrus fruit), lemons and limes (accounting for 21 percent), tangerines (more than 5 percent), grapefruit, and pomelos (2 percent). For 45 percent of the organic citrus area, no crop detail was available (see Figure 30).

However, when considering different production regions, Europe remained the primary hub for organic citrus production, boasting over 61'200 hectares in total. Notably, Italy (with 31'218 hectares) and Spain (with 25'821 hectares) emerged as dominant players in this region. Following closely was Latin America, covering 28'565 hectares, where Mexico took the lead with over three-thirds of the total hectares (21'492 hectares), followed by Argentina (3'342 hectares) as the second-largest contributor by 2022. Despite having favourable climatic conditions for organic citrus cultivation, Africa lagged behind with only 6'534 hectares in 2022. Notable African producers of organic citrus included Morocco (with 1,935 hectares), Egypt (with 1'303 hectares), and South Africa (with 1'099 hectares).

Tables and Figures

- Figures on organic citrus fruit can be found on page Figure 30: Citrus fruit: Organic area 2022
- Tables on organic citrus fruit can be found from page 294

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Exports to the EU and US

Fresh organic citrus fruits

In 2022, a substantial quantity of over 54,000 tons of fresh organic citrus fruits found their way to export destinations in the European Union and the USA. Among the organic citrus fruits sent to these markets, lemons and acid limes took the lead with an impressive 38'948 metric tons, followed by oranges at 11'894 tons. Additionally, there were exports of pomelo and grapefruits totalling 1'993 tons, along with tangerines amounting to 1'491 tons. These exports of fresh organic citrus fruits serve as valuable supplements to local production when domestic citrus is out of season (Table 14).

Table 14: Citrus exports by crop to EU and US 2022

Crop	Export in metric tons 2022
Clementines	84
Lemons and acid limes	38'948
Oranges	11'894
Pomelos and grapefruit	1'993
Tangerine	1'491
Citrus fruit, no details	98
Total	54'509

Sources: Traces/European Commission 2023, USDA 2023. The US data do not cover all organic imports.

Table 15: Exports of fresh organic citrus to the EU and US by country 2022

Countries with exports of more than 1'000 metric tons of citrus fruit

Country	Crop	Exports in metric tons
South Africa	Oranges	10'402
	Lemons and acid limes	5'861
	Pomelos and grapefruit	1'684
	Tangerine	896
	Clementines	20
South Africa total		18'863
Mexico	Lemons and acid limes	8'542
	Pomelos and grapefruit	202
Mexico total		8'744
Colombia	Lemons and acid limes	7'485
	Citrus fruit, no details	22
	Oranges	18
Colombia total		7'524
Brazil	Lemons and acid limes	4'777
Brazil total		4'777
Peru	Lemons and acid limes	4'716
Peru total		4'716
Argentina	Lemons and acid limes	2'930
Argentina total		2'930
Chile	Lemons and acid limes	2'336
	Oranges	34
	Tangerine	9
Chile total		2'379
Egypt	Oranges	1'291
	Lemons and acid limes	5
Egypt total		1'296
Morocco	Tangerine	586
	Lemons and acid limes	349
	Oranges	100
	Clementines	64
	Citrus fruit, no details	55
Morocco total		1'154

Sources: Traces/European Commission 2023 and USDA 2023

South Africa, Mexico, Colombia, Chile, Brazil, Peru, and Argentina played pivotal roles in the export of fresh organic citrus fruits to both the European Union and the USA (Table 15), particularly catering to demand during the off-season periods. South Africa, a well-established supplier of fresh fruit to the European Union, stands out as a significant exporter, having shipped the largest quantity of citrus fruits in 2022, totalling 18'863 metric tons.

Mexico's export focus is primarily directed toward the US market, with a notable demand for acid limes and, in recent years, oranges, within the European Union. Importers in Europe increasingly look to countries like Colombia, Chile, Brazil, Peru, and Argentina for off-season supplies.

South Africa's export portfolio comprises various products, including oranges, lemons and acid limes, grapefruits, and smaller quantities of tangerines. Importantly, due to the seasonal nature of supply, South African citrus does not directly compete with locally sourced seasonal citrus production. This distinction also applies to other southern hemisphere countries, such as Chile, Brazil, Peru, and Argentina. Meanwhile, Mexico and Colombia predominantly focus their exports on lemons and acid limes.

Organic citrus juices

In 2021, the European market witnessed a projected 1% annual growth in the import of citrus and tropical fruit juices, encompassing (both conventional and organic). This growth occurred against the backdrop of an overall decline in fruit juice and nectar consumption across Europe, attributed to concerns about calorie and sugar intake among consumers. However, citrus and tropical fruit juices found a unique role as ingredients in low-calorie beverages, smoothies, and flavoured waters, helping maintain stable import demand. Import opportunities in Europe were particularly evident in countries such as France, Germany, the United Kingdom, Spain, Italy, Switzerland, and the Netherlands, as highlighted in CBI's 2021 report.

Organic citrus juices encompass a range of fruit types, including orange, lemon, lime, grapefruit, and tangerine juices. Most of these juices are produced in either "Not from Concentrate" (NFC) or "From Concentrate" (FC) forms. Notably, the organic market typically favours NFC juice due to its superior taste quality, allowing it to command a premium price.

Key citrus-producing nations like the United States, Spain, Italy, Brazil, and Mexico have played significant roles in the global production of organic citrus juice. The driving force behind the growth of the organic citrus juice market has been consumer demand for organic products, including juices. Consumers who prioritize organic and natural products actively seek out organic citrus juice, which can be found in both mainstream grocery stores and specialized health food outlets.

The expanding organic food and beverage market has led to increased availability of organic citrus juices in supermarkets, health food stores, and specialty markets. This greater visibility enhances consumer access and awareness. Many juice producers have responded to the rising demand for organic citrus juices by diversifying their product offerings to include organic options, either as standalone products or blended with

other juices (such as orange juice + carrot juice or in smoothie combinations). This diversification allows companies to tap into the growing organic market and meet the evolving preferences of consumers.

Market development trends and outlook

Organic citrus production has gained significant traction due to the rising consumer demand for organic products. Consumers often opt for organic citrus products, including fresh fruits and juices, driven by perceived health benefits, environmental considerations, and a desire to support sustainable and pesticide-free farming practices. As highlighted earlier, organic citrus cultivation is practiced in diverse regions worldwide, with countries like Spain, Italy, Mexico, and the Dominican Republic emerging as major contributors. Commonly grown organic citrus fruits include acid limes, lemons, oranges, and grapefruits, catering to both the fresh fruit and juice markets.

Countries with robust organic citrus production often export their products to satisfy demand in regions less suited for citrus cultivation or to bridge the gap in local production during off-seasons. Consequently, the organic citrus market has exhibited steady growth, with increased availability of juices and fresh fruits in supermarkets and specialized organic retailers.

Nevertheless, organic citrus farming presents several challenges:

- Lower yields: Organic methods, which exclude chemical fertilizers and inputs for pest and disease management, may result in potentially lower yields compared to conventional citrus farming.
- Nutrition and resilience: Ensuring proper nourishment and resilience of organic citrus orchards in the face of climatic variations remains a significant challenge.
- Pest and disease management: Organic citrus farming relies on the integration of various pest and disease management strategies, often demanding more labour, costs, and expertise from growers.
- Citrus greening disease: The emergence of citrus greening disease in various regions worldwide has had adverse effects, initially reducing tree productivity, impairing citrus fruit quality (flavour and sweetness), and ultimately leading to the demise of large citrus orchards.
- Awareness gap: There is generally low awareness within the citrus sector about the proactive measures needed to counter the potential threat of citrus greening.

As long as these challenges persist, despite the continuous expansion of organic citrus production areas driven by the increasing demand for organic citrus and, potentially, as a response to replacing areas affected by citrus greening disease, the development of organic citrus farming may remain limited compared to other perennial crops. This could lead to a decline in the global citrus fruit acreage, as many producers might shift back to conventional production methods or transition to different crops.

Acknowledgements

Since 2011, Coop, the Swiss supermarket chain, has been collaborating with the Research Institute of Organic Agriculture FiBL and local partners to support Mexican

citrus producers in their efforts to combat citrus greening, a devastating disease. To advance this crucial initiative, financial backing from the Coop Sustainability Fund has enabled FiBL to expand its activities in Mexico. This expansion includes the implementation of a research program focused on the "integrated management of Huanglongbing (HLB) in organic citrus orchards." This initiative underscores the commitment of Coop and FiBL to sustainable agriculture and the well-being of citrus producers in Mexico.

References

CBI (2021) [Online]: The European market potential for citrus and tropical juices. The CBI website, available at <https://www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/citrus-and-tropical-juices/market-potential>

Web links

- › Website of the Coop-FiBL citrus project: <https://citrus-greening.fibl.org>
- › YouTube.com: FiBLFilm: Video Citrus Greening – Disease and Symptoms (English) - <https://www.youtube.com/watch?v=W5mg3lv9sTI>
- › YouTube.com: FiBLFilm: Citrus Greening – Alternate Cutting, <https://www.youtube.com/watch?v=aqwWVf6rpWU>

Statistics of the Biodynamic Federation Demeter International

CLARA BEHR¹

The Biodynamic Federation Demeter International is an umbrella organization comprising 48 member organizations committed to biodynamic agriculture. Present in 36 countries worldwide, it was established just four years ago with the primary goals of uniting, promoting, and bolstering a global, sustainable agricultural movement. This movement is set to mark its centenary in 2024. Notably, the Biodynamic Federation Demeter International stands as the sole ecological association that has successfully established a network for individual certification of biodynamic farming practices worldwide, all bearing the Demeter brand.

Among the 48 member organizations within the Federation, 19 serve as certifying bodies. In all other nations, certification is conducted by the International Certification Office (ICO) of the Biodynamic Federation Demeter International. Collectively, this network encompasses more than 7,000 Demeter farms, spread across a vast expanse of over 255'000 hectares in 62 countries (Figure 50, Figure 51, Table 16, Table 17).

The Biodynamic Federation Demeter International operates in partnership with its members, embodying the principles of an international confederation guided by democratic ideals. At its core, biodynamic agriculture is rooted in the methods introduced by Rudolf Steiner during his "Agriculture Course" held in Koberwitz (today Poland) in 1924. These methods have since evolved through practical application and research. At its essence, this holistic approach is deeply rooted in a profound sense of caring, responsibility, and transparency towards humanity. It also embodies a commitment to a fair and respectful engagement with its social environment, the well-being of communities, and the preservation of the natural world.

The Biodynamic Federation Demeter International operates across various key domains, including:

- Active participation in and support of research initiatives;
- Provision of training services for farmers, advisors, certifiers, and inspectors;
- Vigilant administration to safeguard the Demeter® trademark;
- Certification of farms, processors, and traders in accordance with the International Demeter Biodynamic Standard;
- Dissemination of information and promotion efforts to increase awareness of the Demeter trademark and the intricacies of biodynamic farming methods;
- Assistance in marketing Demeter certified products sourced from biodynamic agriculture;

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- Advocacy for the adoption of more sustainable farming systems that benefit farmers and our environment;
- Backing for emerging biodynamic projects and initiatives worldwide.

Demeter has experienced consistent growth in the number of certified farms over the past few decades. Since the start of the new millennium, the global count of Demeter farms has surged by approximately 4'000, reaching a total of over 7'000. Recent developments indicate a robust interest in Demeter certification, resulting in more than 255'000 hectares of agricultural land now dedicated to biodynamic cultivation. Notably, sectors like Demeter bananas and Demeter olive oil have demonstrated significant dynamism, with substantial areas transitioning to biodynamic practices due to heightened interest and the establishment of new distribution channels.

Biodynamic viticulture is also gaining prominence, with approximately 1'400 Demeter certified wineries worldwide, led by France with 701 wineries. Outside the EU, countries such as the USA, Chile, and Argentina have the most wineries. In sum, around 25'000 hectares of Demeter certified land are dedicated to biodynamic vineyards.

Development of Demeter-certified farms

Source: Biodynamic Federation Demeter International 2022

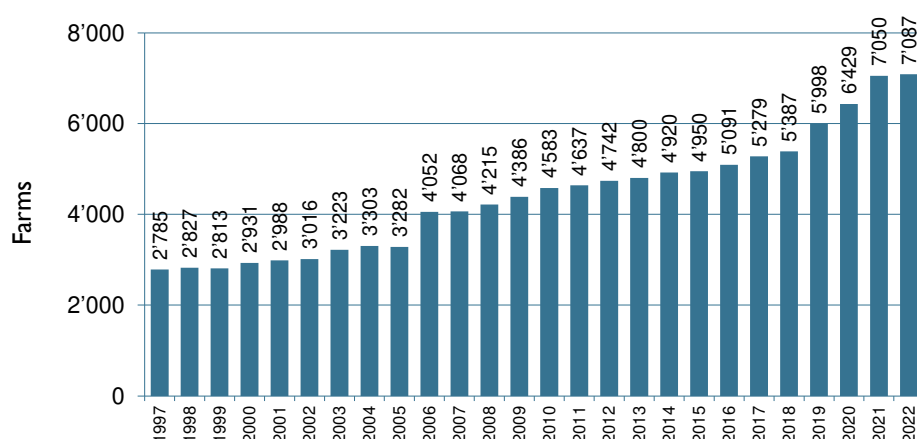


Figure 50: Development of Demeter-certified farms

Source: Biodynamic Federation Demeter International 2022

Development of the Demeter-certified area

Source: Biodynamic Federation Demeter International 2022

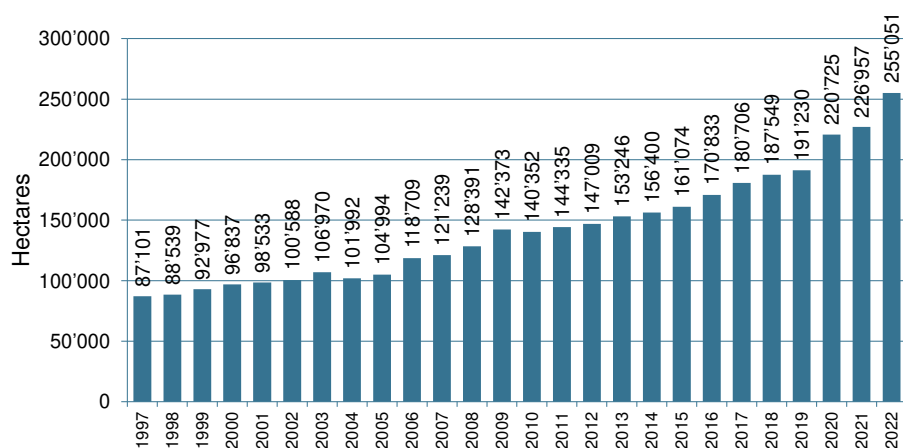


Figure 51: Development of the Demeter-certified area

Source: Biodynamic Federation Demeter International 2022

Table 16: Certified Demeter operations in member countries with certifying organisation (9/2022)

Country	Hectares	Farms	Processors	Distributors
Austria	8'292	266	51	4
Brazil	1'428	25	27	1
Denmark	4'500	53	14	12
Egypt	2'731	87	8	0
Finland	267	10	4	4
France	19'860	963	132	54
Germany	106'486	1'812	466	205
United Kingdom and Ireland	3'848	100	46	10
India	8'265	44	13	2
Italy	20'010	438	101	65
Luxembourg	513	12	2	1
The Netherlands	10'501	160	46	60
New Zealand	533	13	1	0
Norway	466	21	9	9
Slovenia	294	39	26	2
Spain	16'307	435	67	29
Sweden	743	19	9	12
Switzerland (including Liechtenstein)	8'245	413	96	75
USA	10'863	130	79	39
Total	224'152	5'040	1197	584

Source: Biodynamic Federation Demeter International 2022

Table 17: International Certification Office (ICO) - certified Demeter operations in other countries

Country	Hectares	Farms	Processors	Distributors
Argentina	1'244	25	1	2
Belgium	424	17	10	6
Bosnia Herzegovina	117	1	0	0
Bulgaria	387	4	0	0
Chile	1'290	20	1	1
China	159	5	1	0
Colombia	60	2	0	0
Costa Rica	18	1	1	0
Croatia	9	1	0	0
Czech Republic	4'829	8	0	0
Dominican Republic	2'449	70	0	6
Ecuador	314	76	3	1
Ethiopia	17	1	0	0
Georgia	8	1	0	0
Greece	731	73	6	3
Guinea Bissao	0	0	1	0
Honduras	72	8	0	0
Hongkong	0	0	0	1
Hungary	6'531	37	1	2
Iran	67	1	1	0
Kuwait	0	0	1	0
Lithuania	2'252	15	0	1
Malaysia	0	0	3	0
Mexico	297	4	1	1
Morocco	25	1	0	0
Nepal	7	1	0	0
Paraguay	611	44	0	0
Peru	184	30	0	1
Poland	2'493	16	0	1
Portugal	672	13	2	1
Romania	514	7	1	0
Serbia	57	2	1	0
Singapore	0	0	1	0
Slovakia	158	1	0	0
South Africa	236	3	0	0
Sri Lanka	1'499	1'223	4	0
Suriname	35	1	0	0
Tanzania	30	1	0	0
Tunisia	1'329	128	4	0
Turkey	1'156	203	2	1
Uganda	273	2	0	0
Ukraine	345	1	0	0
United Arab Emirates	0	0	1	0
Uruguay	0	0	1	0
Total ICO certified	30'899	2'047	48	28
Total Demeter-certified	255'051	7'087	1245	612

Source: Biodynamic Federation Demeter International 2022

Table 18: Demeter wineries 2022

Country	Wineries	Vineyards in hectares
Argentina	13	498
Australia	87	875
Belgium	3	11
Brazil	1	212
Bulgaria	1	8
Chile	13	1385
china	1	55
Croatia	1	2
Czech Republic	1	44
Denmark	2	6
France	701	12'542
Georgia	1	3
Germany	106	1209
Greece	18	48
Hungary	7	100
Italy	168	2674
Netherlands	4	8
New Zealand	6	158
Poland	1	3
Portugal	3	24
Romania	3	154
Serbia	1	11
Slovenia	10	93
south Africa	1	57
Spain	85	2560
Switzerland	73	509
Turkey	1	1
United Kingdom	10	65
United states	74	1678
Total	1'402	25'023

Source: Biodynamic Federation Demeter International 2022

Global Market for Organic Food and Drink

The Global Market for Organic Food & Drink¹

Amarjit Sahota²

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 may be 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, phone +44 20 8567 0788, e-mail services@ecovaint.com

I Introduction

The organic products market has been adversely affected by global geopolitical conflicts and uncertain economic conditions. Revenue growth continued in 2022; however, this has been partly because of rising organic food prices. Some countries, including Germany and France, reported declines in monetary sales and volumes. In the USA and other countries, revenue growth has been at a comparatively low rate.

Fluctuations in exchange rates of major international currencies have affected revenue growth in the organic food market. If measured in US dollars, the market declined by 3.0 percent in 2022. The European market – the only region showing negative revenue growth - reported a 1.3 percent decline that year. The depreciation of the Euro against the US dollar leads to a larger 12.2 percent drop in European revenues.

A different picture emerges if monetary growth is measured in Euros. The global organic food and drink market expanded by 8.9 percent in 2022. The North American market, which expanded by 4 percent that year, reported a 16.9 percent increase. This is due to the greenback appreciating by 11 percent against the Euro in the foreign exchange market. If we look beyond exchange rates, Ecovia Intelligence sees growth of 2-3 percent in the global organic food and drink market in 2022. It is worth pointing out that much of this growth has been driven by rising food prices. According to the Food & Agriculture Organisation's (FAO) food price index, the price of internationally traded commodities increased by 14.3 percent from 2021. This was the highest rise since records started in 1990. Organic and conventional food prices have increased because of disruption in global supply chains caused by the Ukrainian conflict.

The global organic food and drink market was valued at 127.7 billion euros in 2022.³ Future market growth will continue to be affected by macroeconomic and political factors, which are impacting organic food prices and, thus, consumer demand.

¹ 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. For the FiBL retail sales data, see page 61.

² Amarjit Sahota is the Founder of Ecovia Intelligence (formerly Organic Monitor). Since 2001, our organisation has been tracking the global organic & related product industries. More details are on www.ecovaint.com

³ Please note there is a difference in the market size data of Ecovia Intelligence and FiBL because of differences in research methodology.

2. Historic growth

If we look at historic growth, the global organic food and drink market has grown from 47.6 billion euros in 2012 to 127.7 billion euros in 2022. Organic food sales have grown by 10 percent compound annual growth rate over this ten-year period.

The highest growth was observed in 2020. The coronavirus pandemic led to a surge in demand for organic and health foods; consumers bought organic products as they looked to boost their personal immunity.

Global market: Growth in global market for organic food & drink, 2012-2022

Source: Ecovia Intelligence

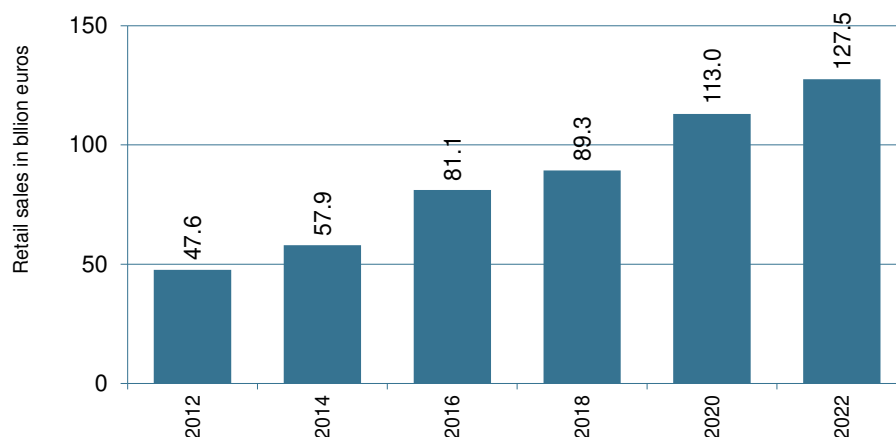


Figure 52: Growth in Global Market for Organic Food & Drink, 2012-2022

Source: Ecovia Intelligence

3. Regional Markets

North America and Europe comprise most global organic food sales, with a combined share of 90 percent, as shown in chart 2. The revenue share of North America is increasing because of relatively higher growth than that in Europe. The strengthening of the US dollar in the foreign exchange rate has also contributed to the revenue increase.

The North American market for organic products was valued at EUR 63.7 billion in 2022. Organic food and drink sales increased by about 4 percent in 2022. The bulk of revenues are from the US market, the largest in the world. Consumer demand for organic products remains buoyant in the US and Canadian markets.

The European market for organic food and drink was worth about EUR 51.3 billion in 2022. The two largest markets in Europe – Germany and France – both reported negative growth that year. The Ukrainian conflict has led to a rise in production,

distribution and retailing costs in Europe. European countries have been grappling with inflation since the conflict started in February 2022. Organic food retailers have been the most affected by the rise in energy costs, food prices, and labour costs. Many organic food retailers have reported negative sales. Large food retailers, especially discounters, have been relatively less affected by the weak economic conditions in Europe.

The Asian market is the third largest in the global arena. The market for organic products is also important in Australasia and Latin America. The African organic food and drink market is growing, albeit from a small base.

Global market: Revenue breakdown by major geographic regions, 2022
Source: Ecovia Intelligence

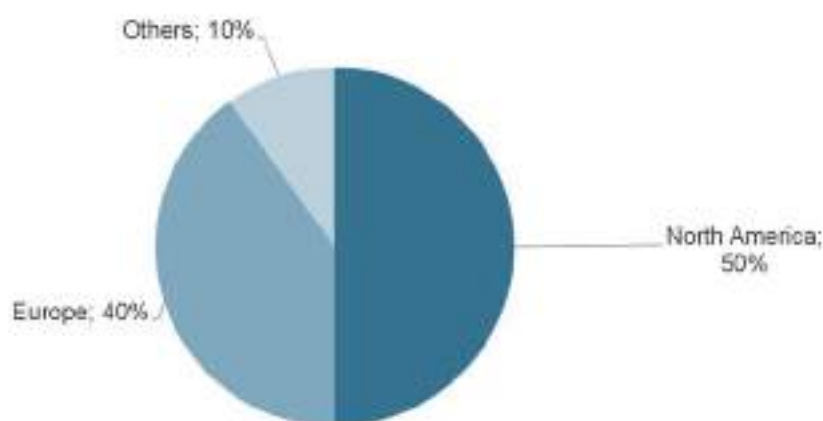


Figure 53: Global market: Revenue breakdown by major geographic regions, 2022

Source: Ecovia Intelligence

4. Major Challenges

Growth in the global market of organic products depends on macro factors, as well as changing patterns of consumer demand and the related environment. Some of the major challenges affecting the market are listed here.

Inflation and rising food prices

Food prices increased by about 12 percent in 2022, having an adverse effect on organic food sales. Rising food prices have made consumers more price-sensitive; demand for premium products, including organic foods, has been negatively affected in Europe. This was a major factor for organic food sales to decline in Europe in 2022.

According to the FAO (United Nations), global agricultural food commodity prices have decreased by about 25 percent since peaking in April 2022. However, food inflation remains high, especially in developing countries. Even in the EU, real food

inflation was 4.6 percent in 2023 (Source: Statista). The rate is much higher in Belgium (10.9 percent), the Netherlands (8.8 percent) and Greece (6.6 percent). High food prices are dampening consumer demand for organic products.

Geopolitical factors

Agricultural food products, including organic foods, are affected by geopolitical factors. Since it began in February 2022, the Ukrainian conflict has disrupted food supply chains, as well as raising fertiliser prices and energy prices. Ukraine and Russia are two of the world's leading exporters of wheat, corn, barley and sunflower oil.

The Organization for Economic Cooperation and Development (OECD) projected 5.0 percent growth in the global economy for 2022, however the impact of the conflict led to just 3.1 percent economic growth that year. Apart from its effects on food and energy prices, the conflict has led to economic and political uncertainty. Many countries reported a fall in consumer expenditure, with demand for essentials and non-essential items curtailed.

The Ukrainian conflict was continuing into 2024. There are also concerns that a prolongation of the Israeli-Palestine conflict could give economic shocks. At the end of 2023, there was disruption to shipping routes in the Red Sea; this was raising concerns that global supply chains for agricultural crops and foods could be disrupted.

Organic food supply

The coronavirus pandemic led to a surge in demand for organic foods in 2020. Supply could not keep pace with demand in numerous organic product categories. Market growth has slowed since, raising concerns about oversupply. In 2023, some traders were reporting excess capacity and sluggish demand.

These supply-demand swings have a negative effect on the organic food market. Conventional food producers become reluctant to convert to organic agricultural practices if there is uncertain demand. Some organic products are marketed as conventional products without the premium because of weak demand.

Consumer demand

Consumers are buying organic foods for various reasons. Health factors are important for many consumers; during the pandemic, disease prevention and building personal immunity were important reasons for consumers to buy organic foods. Health and ethical reasons remain important in countries like France and Germany. However, other food products are appealing to these health and ethical beliefs in consumers. For instance, consumers are mainly buying plant-based foods because of health reasons and animal welfare.

In the USA, avoidance of GMOs is a major factor for consumers to buy organic foods. However, consumers can also buy products that are certified GMO-free. Launched in 2010, sales of Non-GMO Verified product sales have now exceeded \$25 billion. Initially adopted by organic food companies, the majority of certified products are no longer organic.

Some consumers, like those in Denmark, are purchasing organic foods because of concern about the environment. Many new eco-labels have been introduced in recent years that represent environmentally-friendly products. These vary from the EU Eco-Flower and Nordic Swan for low environmental impact products in Europe to single ingredient labels like Roundtable on Sustainable Palm Oil (RSPO) and Bonsucro (sustainable sugar).

A wide range of eco-labels and sustainability schemes now offer consumers options for health foods, environmentally-friendly products, ethical products, etc. the challenge is to differentiate organic foods from such products.

5. Conclusions

After receiving a boost in 2020, global sales of organic foods have stabilised. Although revenues continue to increase, consumer demand for organic products has been negatively affected by food inflation and weak economic conditions. The organic food industry is not immune to geopolitical conflict that is causing disruption in global supply chains of agricultural products. Ecovia Intelligence predicts healthy growth to resume as economic conditions improve.

Standards and Regulations Policy Support

Worldwide Overview of Regulations and Policies on Agroecological Approaches Including Organic

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Special acknowledgement for their contribution to the research

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Introduction

An increasing number of governments worldwide are actively endorsing the promotion of agroecological policies. They are doing so by launching new initiatives and programs with clear and predefined objectives. Concurrently, broader regional patterns indicate a growing momentum in the development of agroecological policies, which is propelled by the formulation of strategic initiatives.

Policies fostering agroecology and organic agriculture

Tanzania

In the autumn of 2023, Tanzania introduced the National Ecological Organic Agriculture Strategy (NEOAS), marking a pioneering step on the continent. The strategy is designed to contribute to environmental resilience, climate change mitigation, and sustainable crop and livestock production, in alignment with Tanzania's Development Vision 2025 and the Agricultural Sector Development Program Phase II.

Particularly, the key goals of this strategy include:

- Facilitating the shift of farmers to agroecology by incorporating insights from both research and indigenous knowledge.
- Establishing a sustainable inputs sector with viable alternatives to the expensive importation of pesticides, seeds, and fertilizers.
- Cultivating robust supply chains and markets, both locally and globally, for organic and agroecological products.

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- Enhancing the capacity of civil society organizations to play a pivotal role in advancing these transitions.
- Providing support for financing, monitoring, coordination, and evaluation of the strategy.

Furthermore, the government has pledged to incorporate organic agriculture and agroecology as a comprehensive policy initiative in the upcoming national biodiversity strategy (NBSAP). This strategy represents an invitation to donor partner nations to participate in the outlined initiatives, which are part of a larger, coordinated effort.

Vietnam

In recent years, the Vietnamese Government has demonstrated a dedicated commitment to driving the transformation of the country's food systems. This commitment aims to promote sustainability and resilience to climate change, advance environmental conservation, increase the value of agricultural products, and improve the livelihoods of farmers. The determination to reshape Vietnam's food system is clearly outlined in the 2021-2025 socio-economic plan, which sets forth a resolution to develop agriculture that is green, clean, ecological, organic, hi-tech, and smart—capable of adapting to climate change. Furthermore, the National Strategy for Sustainable Agriculture and Rural Development (2021-2030), projecting a vision until 2050, explicitly emphasizes the significance of agroecological solutions in achieving these objectives.¹

Complementing this commitment is the recently approved Vietnam National Action Plan on Food System Transformation (NAP-FST), aligning with the principles of Transparency, Responsibility, and Sustainability in Vietnam by 2030. The NAP-FST received approval from the Vietnamese Prime Minister on March 28, 2023. This action plan aims to guide and coordinate the efforts of both domestic and foreign organizations, directing them toward the development of a responsible, transparent, and sustainable food system in Vietnam by 2030. It serves as a foundational framework for the implementation of the 2030 Agenda for Sustainable Development. Furthermore, in Decision 300/QĐ-TTg (2023) regarding the NAP-FST, Vietnam has set a target of allocating a minimum of 2.5% of agricultural land for organic production and doubling the use of organic fertilizers compared to the levels in 2020.²

Cambodia

In response to the imperative shift towards sustainable agriculture, the Government of Cambodia has demonstrated a tangible commitment to advancing conservation agriculture (CA), sustainable intensification (SI), and agroecology. This commitment is

¹ PM Vietnam (2022) DECISION approving sustainable agriculture and rural development strategy for the 2021 – 2030 period, with a vision to 2050. Available at: https://icraf-cifor-my.sharepoint.com/:w:/g/personal/n_minh_cifor-icraf_org/EdQwaL1T7GlBnxJu2CYr7ZEBuldEwrCiaTwY4ovS1K477Q?rttime=Qe5INhgC3Eg (Accessed: 21 December 2023).

² ASSET (2022) Report of the National foresight and theory of change workshop in Vietnam, 12 -13 October 2022, in Hanoi. Agroecology and Safe food System Transitions (ASSET) project

manifested in the establishment of Cambodia Conservation Agriculture Sustainable Intensification (CASIC), an inter-governmental and multi-stakeholder platform officially endorsed by the Minister of the Ministry of Agriculture, Forestry, and Fisheries (MAFF) in mid-2020. The overarching objective of CASIC is to enhance coordination and provide support to stakeholders, fostering the promotion of CA and SI towards agricultural modernization and agroecology in Cambodia and Southeast Asia.

To streamline priorities and operational procedures within CASIC, a roadmap towards modernization and agroecology spanning 2022-2026¹ has been initiated and crafted. Developed with technical and financial support from Swisscontact and the French Agricultural Research Centre for International Development (CIRAD), this roadmap is designed to align with national development goals and priorities. It thereby contributes to realizing the key policies and strategies of the Cambodian government, particularly those related to sustainable agriculture development, combating land degradation, biodiversity conservation, and climate change adaptation and mitigation.

The Indian state of Kerala

The government of Kerala has initiated the Organic Farming Mission with the objective of promoting the adoption of sustainable, organic, and climate-smart farming practices on 5'000 hectares over the next five years. The mission has set an annual target of cultivating 1'000 hectares, with the overarching goal of transforming the entire state into a hub for organic farming.

The mission is thoughtfully designed to introduce and promote sustainable farming practices. It encompasses the creation of a strong support system for organic farmers and the exploration of potential markets for organic products. An important aspect of this initiative is the integration of organic farming into educational curricula. The mission also pledges to take comprehensive actions to enhance the certification, branding, and marketing processes for organic agricultural products from Kerala, incorporating a dedicated organic farming protocol. Furthermore, efforts will be focused on adding value to organic products and establishing seed banks in local communities.

Currently, Kerala is home to approximately 300 certified organic farmers, with a primary focus on the export market. The state is supported by accredited organic certifying agencies that cater to the needs of these farmers. It's worth highlighting the substantial demand for organic varieties of Jeerakasala and Gandhakasala paddy, which are cultivated in Wayanad, Kerala. The Organic Farming Mission represents a strategic initiative aimed at fostering a sustainable agricultural landscape and improving the economic viability of farmers in Kerala.

¹ MoAFF Cambodia (2022) Roadmap of Cambodia Conservation Agriculture and Sustainable Intensification Consortium (CASIC) 2022 – 2026. Available at: https://assets-global.website-files.com/6126fbc77de2da46c24ab103/6131cf6e9979f71af8362117_CASIC_Roadmap_final_En.pdf (Accessed: 21 December 2023).

Japan

The Ministry of Agriculture, Forestry, and Fisheries (MAFF) of Japan is actively involved in creating model areas known as "Organic Villages." These villages are part of the MIDORI Strategy¹, which was launched in 2021 as a medium-to-long-term plan for developing a sustainable food system. An Organic Village represents a municipality that encourages community-wide participation in organic farming, involving not only farmers but also businesses and residents both within and outside the region. This holistic approach encompasses activities from the production to the consumption of organic agricultural products. The overarching goal is to gradually establish advanced model areas and expand this initiative nationwide.

The MAFF supports various specific measures, including the establishment of organic agricultural clusters with technical guidance, facilitating business partnerships both within and outside the region, procuring organic produce for school meals, and creating dedicated organic sections within retail stores. As of November 2023, 91 municipalities are actively working on the development of Organic Villages, with the aim of involving 200 municipalities by the year 2030.²

Taiwan

In August 2023, Taiwan underwent a restructuring of its agricultural sector, elevating the Council of Agriculture to the status of the Ministry of Agriculture. This comprehensive transformation also involved the establishment of important entities, including the Department of Resources Sustainability, the Forestry and Nature Conservation Agency, and the Agency of Rural Development and Soil and Water Conservation. The primary objectives of these changes are to attain net-zero emissions in agriculture by 2040, conserve biodiversity, and foster sustainable rural development. As a result, the government has extended active support for a range of policies, with a particular emphasis on organic agriculture.

For instance, in 2023, three Organic Agriculture Promotion Zones (OAPZ) were established, encompassing approximately 219 hectares. Entities or farmers located within these OAPZs are eligible for additional subsidies related to organic certification, production materials, marketing, and training.

At the same time, Taiwan inaugurated its inaugural Organic Agriculture Research Center in Hualien County in 2023. This center is dedicated to the development of techniques, organic demonstrations, and research projects encompassing post-harvest crop processing, organic crop varieties, and natural pest management.

In 2023, additional progress was achieved in nationwide food and agricultural education, building upon the legislative passage of the Food and Agricultural

¹ MOAFF Japan (2023b) Strategy for Sustainable Food Systems, Midori, Ministry of Agriculture, Forestry and Fisheries of Japan. Available at: https://www.maff.go.jp/e/policies/env/env_policy/meadri.html (Accessed: 21 December 2023).

² MoAFF Japan (2023b) Strategy for Sustainable Food Systems, Midori, Ministry of Agriculture, Forestry and Fisheries of Japan. Available at: https://www.maff.go.jp/e/policies/env/env_policy/meadri.html (Accessed: 21 December 2023).

Education Act in 2022. The majority of local governments established Food and Agricultural Education Promotion Committees to spearhead organic education initiatives within schools, kindergartens, community facilities, and retail stores. The primary aim is to promote an organic lifestyle and foster the consumption of domestically produced agricultural products.

Regional policy development

The ASEAN region¹

Established in 2012, the Lao-facilitated Initiative on Agroecology (LICA) is dedicated to promoting agroecology transitions in the ASEAN region. During the 38th ASEAN Sectoral Working Group on Crops, LICA was recognized for its contribution to drafting an ASEAN policy guideline for agroecology transition, as outlined in its work plan. Additionally, LICA's role as a "Reference Group" for ASEAN regarding matters related to agroecology was endorsed.

In October 2022, during the 44th Meeting of the ASEAN Ministers of Agriculture and Forestry (AMAF), "The ASEAN Regional Guidelines on Sustainable Agriculture" were adopted to address the imperative for a sustainable food production system. These guidelines emphasize key pillars, including environmental integrity, economic resilience, social well-being, good governance, food security, and poverty alleviation. The overarching objective is to establish a sustainable food market, mitigating challenges posed by increasing trade barriers, tariffs, and restrictions on ASEAN agricultural and food products.

The ASEAN policy guidelines for agroecology transition are designed to align with and support the strategic direction of the ASEAN Regional Guidelines on Sustainable Agriculture. A comprehensive review and enhancement of the initial analysis results will be carried out through a series of national consultations, regional discussions, and LICA consultations in the last quarter of 2023.²

The African Union

In 2011, the Heads of States and Governments of the African Union (AU) made a significant decision to integrate Organic Agriculture (EX.CL/Dec.621 XVII) into their national plans, programs, and policies by 2025. This resolution served as the cornerstone for launching a multi-year continental initiative known as Ecological Organic Agriculture (EOA). This initiative is tasked with overseeing and reporting on the implementation of the decision.

Actively engaged in the Comprehensive Africa Agriculture Development Programme (CAADP) process, which serves as Africa's policy framework for agricultural transformation, wealth generation, and food and nutrition security under the African

¹ ASEAN is the Association of Southeast Asian Nations. For more information see <https://asean.org/>.

² FAO, CIRAD, ESCAP & CASIC (2023) Policy Dialogue on Supporting Agroecology Transition in the ASEAN region. Available at: https://www.unescap.org/sites/default/d8files/event-documents/TARASA23_Policy%20Dialogue%20Agroecology_Concept%20Note%20and%20Programme.pdf

Union, the EOA initiative has achieved significant policy milestones. The status and progress of the AU Decision on Organic Agriculture were reported for the first time in the 3rd CAADP Biennial Review Report (2015-2021). Furthermore, a significant milestone was reached during the 4th CAADP Biennial Review, where three indicators related to EOA/Agroecology were adopted.

The 4th CAADP Biennial Review included 49 countries reporting on seven commitments and various indicators. Sixty-five percent of these countries reported on the three EOA indicators associated with Commitment 3 (Ending Hunger by 2025) and Commitment 6 (Enhancing Resilience to Climate Variability). These indicators encompass organic fertilizer usage, the status of Farmer Managed Seed Systems, and the agricultural area under EOA practices.

The presentation of the final 4th Biennial Review report to the AU Heads of State and Governments is scheduled for adoption in February 2024.

Organic Regulations

Regarding regulations, based on the most recent data compiled by IFOAM – Organics International in 2022, 75 countries have effectively enacted comprehensive regulations governing organic agriculture. Furthermore, 19 countries have put in place organic regulations that are not yet fully enforced, and 14 countries are presently in the process of drafting legislation (Significantly, New Zealand has made the decision to comprehensively regulate the organic sector, whereas Australia has chosen not to partake in this process and has opted to regulate only export operations.

Table 19).

Significantly, New Zealand has made the decision to comprehensively regulate the organic sector, whereas Australia has chosen not to partake in this process and has opted to regulate only export operations.

Table 19: Organic regulations worldwide by region 2022

Continent	Drafting	Fully implemented	Not fully implemented	Total
Africa	5	1	4	10
Asia	7	11	10	28
Europe		41	2	43
Latin America and the Caribbean	2	16	3	21
North America		2		2
Oceania		4		4
Total	14	75	19	108

Source: IFOAM – Organics International

The guidance for growers' groups on certification according to the new (EU) Organic Regulation 2018/848

The European Union's (EU) Organic Regulation 2018/848 introduces significant changes to group certification and internal control systems (ICS) in organic farming. The implications of these recent regulations have a global reach, impacting approximately two million organic farmers worldwide who are currently certified

under ICS groups. This notably includes those involved in the production of commodities such as coffee, cocoa, sugar, cotton, rice, tropical fruits, nuts, spices, and honey.

IFOAM - Organics International, in collaboration with the Research Institute of Organic Agriculture FiBL, IFOAM Organics Europe, and leading experts in the field, has formulated guidance to assess and elucidate the implications and significant modifications introduced by the new EU Organic Regulation for producer groups worldwide since 2021.

The last remaining fundamental legal questions pertaining to the EU's definition of a "Group of Operators" were ultimately resolved in the European Commission's updated Q&A document released on June 12, 2023.

This legal clarification by the European Commission, along with the extensive stakeholder consultations conducted by our organizations, has revealed that the new regulation for organic producer groups carries more significant consequences and requires more comprehensive organizational changes than were initially anticipated and communicated during previous events. The majority of currently certified smallholder producer groups will need to reorganize or establish new legal group entities that align with the EU's definition of a "group of operators." Organic operators worldwide will be expected to achieve compliance with all the detailed and intricate requirements of Regulation (EU) 2018/848 and its secondary regulations, as the decade-old import system of "equivalence" is phased out by December 31, 2024.

IFOAM – Organics International, in collaboration with FiBL, successfully hosted a webinar on July 23, 2023, to officially introduce the finalized version of the "IFOAM Guidance & Explanation of Group Certification Requirements" in accordance with the New EU Organic Regulation 2018/848. You can access the comprehensive guidance and the recording of the event on the IFOAM website within the Internal Control Systems (ICS) for Group Certification section.

Pacific Organic Standard

The Pacific Organic Standard Guidebook, which was released in 2022, has proven to be a valuable resource for users of the Pacific Organic Standard (POS). It ensures consistency and upholds organic integrity through fair yet firm consensus interpretations of the standard text. Throughout 2023, the Pacific Organic and Ethical Trade Community (POETCom) has received and compiled suggestions for additions, clarifications, and country-specific language. As the Guidebook is a dynamic, living document, POETCom plans to incorporate these changes in 2024 and make updates on an annual basis as necessary.

An important outcome of the Guidebook development process has been the identification and cataloging of language in the POS that requires modification or correction from the original text. In 2024, POETCom is considering the initiation of a formal Standards Revision Process for the Pacific Organic Standard.

Australian Government decision against domestic organic regulation

In late 2021, the previous Australian Federal Government established the Organic Industry Advisory Group (OIAG) to deliberate on the domestic regulation of organics in Australia. Throughout 2022, the OIAG convened to discuss the matter and ultimately endorsed the idea of developing domestic regulations. However, the current Australian Government has decided against implementing domestic regulations for the organics industry after conducting two separate cost-benefit analyses (CBAs), both of which concluded that the associated costs would outweigh the benefits. In the government's view, the potential advantages of a mandatory domestic standard for the organic sector would not justify the significant expenses involved in designing, monitoring, and enforcing such a comprehensive regulatory scheme.

Currently, Australia has a National Standard for Organic and Bio-Dynamic Produce that exclusively regulates exports. This standard allows the country to export organic products to significant global markets. Rather than regulating the domestic market, the government has chosen to concentrate on exports and engage in active negotiations regarding equivalence and free trade agreements.

After the legislative proposal was rejected, the prominent organic industry organizations and certification bodies came together to establish the Organic Development Group (ODG). The primary objectives of the ODG are to promote the interests of the organic sector in Australia and to persist in advocating for domestic legislation.¹ The following organizations have joined this coalition:

- ACO Certification Ltd (ACO)
- Australian Organic Limited (AOL)
- Bio Dynamic Research Institute (BDRI)
- Certified Organic Biodynamic Western Australia (COBWA)
- National Association for Sustainable Agriculture Australia (NASAA)
- NASAA Certified Organic (NCO)
- Organic and Regenerative Investment Co-operative (ORICOOP)
- Organic Consumers Association Australia (OCAA)
- Organic Food Chain (OFC)
- Organic Industries of Australia (OIA)
- Southern Cross Certified (SXC)

Following the government's decision not to enact domestic organic legislation, Australia will continue to be the only OECD country that does not regulate its domestic market, even though its total organic retail sales volume exceeded 2.1 billion AUD (approximately 1.3 billion euros) in 2022.

¹ Frampton, K. (2023) *Historic Formation of United Voice for Organic Industry, Australian Organic*. Available at: <https://austorganic.com/historic-formation-of-united-voice-for-organic-industry/> (Accessed: 21 December 2023)

New Zealand's new act on organic products and production

New Zealand has enacted the Organic Products and Production Act, marking a significant milestone for the country's burgeoning organic sector. This legislation, effective since April 6, 2023, is designed to promote growth, boost export revenue, and offer businesses comprehensive regulations to support ongoing investment.

The act sets forth a regulatory framework for organic claims and the enterprises that make them, with an emphasis on bolstering consumer confidence, providing stability for businesses, and promoting international trade in organic products. This aligns with the global trend of countries mandating compliance with domestic or equivalent regulations. The act plays a critical role in ensuring ongoing access to established organic markets abroad and opening up new avenues for organic exports.

Key elements of the act encompass the introduction of organic standards, prerequisites for approval as an "operator," the establishment of recognized entities for compliance oversight, provisions related to imports and exports, and regulations concerning enforcement and offenses. The legislation establishes a framework in which the Ministry will define organic standards for various products or categories. Businesses are not obliged to comply until standards are established for their particular products. The act underscores New Zealand's dedication to fostering the growth of its organic sector and upholding high standards in international trade.¹

Memorandum of Understanding for the Recognition of Organic Product Equivalence (MOU) between Canada and Mexico

The Canadian Food Inspection Agency (CFIA) and the Secretariat for Agriculture and Rural Development of the United Mexican States have signed a Memorandum of Understanding (MOU) to recognize the equivalence of organic products. This MOU aims to foster trade in organic products by specifying conditions for equivalence, establishing a Technical Working Group (TWG) to address issues and promote cooperation, and remaining valid for one year, with the option for extension upon mutual consent. The main goals are to enhance consumer confidence, strengthen institutional cooperation, ensure access to existing organic markets, and explore further trade opportunities. Appendices provide details on equivalency conditions, including labeling, oversight, and reporting. This MOU reflects both countries' commitment to supporting their growing organic sectors and international trade.

¹ Goatley, T. and Cohen, A. (2023) Organic Products and Production Act 2023 comes into force heralding in a new organic products regime, Bell Gully. Available at: <https://www.bellgully.com/insights/organic-products-and-production-act-2023-comes-into-force-heralding-in-a-new-organic-products-regime/> (Accessed: 21 December 2023).

Participatory Guarantee Systems in 2023

PATRICIA FLORES,¹ CAROLINA DE JORGE² AND GÁBOR FIGECZKY³

“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 on PGS on a global scale. In total, the global PGS landscape comprises 64'740 initiatives and, 188'709 certified producers, involving 1'823'525 individuals. The certified land area at the global level is an impressive 1'131'933 hectares, highlighting a collaborative effort across continents to establish and adopt PGS in agriculture.

Despite additional efforts during the 2022 survey, it was not possible to collect or update information on the total organic area managed by PGS-certified producers for more than 50 per cent of all operational PGS initiatives. This includes initiatives based in countries with many PGS certified producers, such as Brazil, and countries with many PGS initiatives, such as Bolivia. Therefore, the total organic area managed by PGS-certified producers is likely to be much higher than estimated here.

Among the regions, Latin America stands out with 144 PGS initiatives, certifying 17'787 producers and involving 63'797 individuals. The certified area in this region alone is 16'214 hectares. This highlights Latin America's significant commitment and success in implementing PGS and contributes significantly to the overall global impact of PGS initiatives. Let us take a look back at the 20 years of PGS success since the first landmark event on the continent.

Celebrating 20 years of the International Workshop on Participatory Certification

Since the first international workshop on Participatory Guarantee Systems (PGS), then called "participatory certification", in the city of Torres, Brazil, in 2004, two decades of learning and cooperation have passed, allowing organic stakeholders to make a significant contribution to the multi-dimensional elements of agroecology.

In the PGS timeline developed by the PGS community in Latin America, the first prototypes of PGS are recorded in the early 1970s with the Coólmeia cooperative in southern Brazil, but also appear for the first-time early experiences in Chile in the 1980s

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with cooperatives producing organic food. The early years of third-party certification of organic products in Latin America raised certain concerns, not only in terms of cost, but also in terms of the method used to certify organic products. It was therefore necessary to work on an alternative system developed by organic farmers, consumers, grassroots organisations, supporting civil society organisations and, in some cases, community or local authorities. At the time, this process was called “participatory certification”. Later, with the international workshop in 2004, the term Participatory Guarantee System was agreed upon and widely used in the organic and agroecological movement.

PGS brought inspiring experiences in the early years. This approach has renewed the hope that from the grassroots of the agroecological movement, it is possible to innovate in social processes such as PGS and other mechanisms that allow a better integration of family and peasant agriculture. In this way, the PGS community demonstrates and confirms that markets are essentially a social construction and that bringing consumers and producers closer together allows for more benefits to be derived from the multidimensionality that characterises agroecology.

Participatory Guarantee Systems (PGS) initiatives have had a significant influence and have experienced remarkable growth globally. The interactive PGS map, which updates information on various initiatives at different stages of development, is also a useful tool for monitoring the progress of PGS.

Participatory Guarantee Systems are recognized as an innovation because they persist over time, adapting, recreating, and improving the system according to the context, culture, and framework in which they are embedded. These innovations result from collective efforts, addressing the requirements of the driving group as well as the expectations of a market characterized by progressively discerning, knowledgeable, and conscious consumers.

Participatory Guarantee Systems have attracted the attention of policymakers, consumers, and farmers, contributing to the public debate on strategies to achieve sustainable food systems. They make a significant contribution as they operate at a transformative level, particularly in local food systems

Latin America PGS community

In October 2023, the PGS community in Latin America organised the International Seminar on PGS in the city of Tarapoto, San Martin region, Peru. Representatives from 13 countries attended, including PGS stakeholders and international organisations such as IFOAM - Organics International and the Mountain Partnership.

After the period of disruption caused by Covid-19, the PGS community in Latin America resumed the dynamics of its meetings, which take place every 2-3 years. On this occasion, the presence of the authorities of Peru, Argentina, Costa Rica and Paraguay has provided important insights into the public policy processes, which are different in each country and respond to specific needs and realities.

Among the main conclusions are:

- While the recognition of PGS in national regulatory frameworks gives legality to the processes implemented, many regulations impose requirements that add complexity to the processes and move them away from the basic qualities of PGS, such as simplicity, dynamism, adaptability to local realities and inclusiveness. In many cases, this results in a reduction of the legitimacy of PGS, which is based on participation and involvement, transparency, trust, self-determination and knowledge dialogue, which are fundamental principles of PGS.
- It is highly contradictory and paradoxical that progress in the official recognition of PGS in most cases focuses only on the control and monitoring of PGS, rather than its promotion and encouragement. More support is needed for the effective consolidation of PGS and promotion policies than for control mechanisms.
- The alliance between agroecological farmers and consumers, as well as the articulation with public and private institutions, is essential to democratise healthy food. However, progress is still limited and further efforts are needed.

Despite the challenges, PGS are working, recreated and amplified. Under various circumstances and with a diverse array of actors, they persist in forming collective bonds of collaboration to confront and overcome adversarial situations (excerpted from the joint text adopted by the participants, also known as the Letter of Tarapoto, Peru; October 2023).

America

Within North America, there is one Participatory Guarantee System (PGS) initiative, encompassing 766 certified producers and engaging a total of 876 producers. The cumulative certified area in Africa amounts to 8'440 hectares, highlighting the increasing significance of PGS within the region.

In Puerto Rico, the PGS Puerto Rico initiative is under development, while the Certified Naturally Grown programme is operating at an impressive scale with 650 certified growers covering 7'510 hectares.

Latin America is a vibrant hub for Participatory Guarantee Systems (PGS), with a multitude of initiatives across various countries.

- In Belize, Pro-Organic Belize and the San Antonio Cayo Organic Growers Association are in the early stages of development.
- Brazil has a wide range of PGS initiatives, such as ACEPI with 44 certified producers, Associação Ecovida de Certificação Participativa with 5'662 producers, and Aval de Confianza SPG Antioquia with 12 certified producers.

- In Argentina, a map of PGS initiatives has been developed by the multi-institutional team on Participatory Guarantee Systems comprised of professionals from INTA (National Institute of Agricultural Technologies), INAFCI (National Institute of Family, Peasant and Indigenous Farming), SENASA (Food Safety National Service) and the Direction of Agroecology of the Secretary of Agriculture, Livestock and Fisheries (SAGyP). The objective of this team is to accompany and strengthen national PGS experiences.

According to this PGS team, “PGS are appropriate tools for participatory management of the quality of processes and products coming from family, peasant and indigenous agriculture, agroecology, and biodynamic agriculture. They are based on the active participation of stakeholders involved (producers, consumers, public institutions, NGOs) and are built on trust, social networking, and knowledge sharing. These systems, in addition to guaranteeing the organic quality of products, constitute a strategy for strengthening production, marketing, and consumption networks that contribute to Food Sovereignty.”

- This map aims to give visibility to the PGS in the Republic of Argentina. There are 45 PGS involving 814 families producing organic food according to agroecological principles. In addition to individual PGS data, users can find aggregated data at the provincial level for agroecological farms and areas.

In the last five years, many efforts and initiatives from different provinces in Argentina have started to work on PGS. Today, these processes are identified and supported by a multi-stakeholder platform and team, facilitating the networking and empowerment of farmers and consumers, triggering an agroecological transition in several territories.

- Colombia showcases the Familia de la Tierra SPG with 36 certified producers covering 200 hectares, and the Red MAC Valle del Cauca - Alimentos de Vida, with 247 producers in various areas of operation.
- Costa Rica is contributing to PGS with the Asociacion Agroecológica del Valle (AGROVA) and ACAPRO, affecting several certified producers.
- Cuba is in the development phase with SPG Cubano, while Ecuador has initiatives such as SPG de la Red de Guardianes de Semillas and Probio PGS.
- Paraguay showcases the extensive APRO initiative, with 1,000 certified producers covering 1’637 hectares, highlighting the region's widespread commitment to sustainable and participatory agricultural practices.
- Finally, Uruguay is part of the movement with the Red de Agroecologia, involving 500 certified producers over 550 hectares.

The diverse and widespread adoption of PGS in Latin America reflects a collective effort towards organic and sustainable agriculture.

Africa

In Africa, there are 37 PGS initiatives involving 7’736 certified producers and 27’643 producers in total. The total certified area in Africa is 34’110 hectares, highlighting the increasing significance of PGS in the region.

The landscape of Participatory Guarantee Systems (PGS) in Africa is diverse and dynamic, with several countries actively engaged in the development and implementation of these systems.

- In Benin, the VIVA MATEKPO initiative is operational, with 105 certified producers covering 72 hectares.
- In Burkina Faso, the BioSPG CNABio-BF is operational, with 1'476 producers covering 180 hectares.
- In Kenya, the Kenya Organic Agriculture Network (KOAN) is a major player, with 1'587 producers covering 1,078 hectares.
- Meanwhile, Nigeria's NOAN PGS is up and running with 706 certified producers, while Namibia's Namibian Organic Association PGS covers an impressive 26'502 hectares with 9 certified producers.
- South Africa presents a rich tapestry of PGS initiatives, such as the SPG FENAB "BIO SENEGAL", involving 500 producers, and the SWISSAID Tanzania PGS, involving 897 producers on 1'231 hectares.
- In Uganda, the National Organic Agricultural Movement of Uganda PGS is actively contributing to the PGS landscape.

These examples underscore the continent's commitment to sustainable and participatory agricultural practices through the widespread adoption of PGS.

Asia

Asia plays a prominent role in the global landscape of PGS initiatives, with 64'531 such programmes. This represents a staggering, 160'049 certified producers and a broad engagement of 1'724'687 individuals. The area of certified land in Asia reaches 1'055'284 hectares, representing a significant commitment to sustainable agricultural practices.

A comprehensive overview of Participatory Guarantee Systems (PGS) in Asian countries shows that several countries are actively engaged in developing and implementing these systems.

- Cambodia shows ongoing efforts with multiple PGS initiatives such as PGS Kampong Thom, Prey Veng, Natural Agriculture Village PGS (Kandal), and Caritas Cambodia PGS, indicating a growing interest in participatory guarantee schemes in the country.
- India is emerging as a key player in the PGS landscape, with operational initiatives such as Parnanetra Organic PGS, CSA PGS Regional Council, PGS India, and PGS Organic Council (PGS-OC) having a significant impact on thousands of certified producers.
- Meanwhile, South Korea's Hansalim PGS stands out as a large-scale operational initiative involving 780 producers and 2'200 individuals.

Overall, this comprehensive overview highlights the diverse and growing landscape of PGS initiatives across Asia, and demonstrates the commitment of these nations to sustainable and participatory agricultural practices.

Europe

In Europe, 16 PGS initiatives contribute to the certification of 1'647 producers, involving 3'262 individuals. The certified area in Europe is 4'470 hectares, reflecting the region's commitment to sustainable and certified agricultural practices.

In Europe, a variety of Participatory Guarantee Systems (PGS) initiatives are shaping sustainable and organic agriculture. Belgium, for example, hosts the Voedselteams PGS with 180 certified producers, demonstrating a commitment to operational and true participatory guarantees.

In Spain, the SAES - Sello Agro Eco Social initiative is working with 18 certified producers, contributing to the operational PGS landscape in the region.

Taken together, these initiatives demonstrate a commitment to promoting sustainable, community-based farming practices in the European context, showing a growing trend towards the adoption of participatory guarantee systems in European countries.

Oceania

Turning to Oceania, 11 PGS initiatives involve 724 certified producers and 3'260 individuals. The certified area in Oceania is 13,415 hectares, highlighting the region's progress in promoting sustainable agriculture.

In Oceania, various countries are actively involved in Participatory Guarantee Systems (PGS) to promote organic agriculture.

- In Australia, SCPA Organics has 1'500 hectares of operational grazing land and certifies 14 producers.
- The Cook Islands has successful operational PGS initiatives such as Natura Kuki Airani, which covers 4 hectares of pasture and certifies 17 producers.
- Fiji is making progress with operational projects such as Organic Rotuma (11 hectares, 54 producers) and Bula Batiki Association (43 hectares, 43 producers). In addition, Fiji has initiatives such as FRIEND Fiji PGS (64 hectares, 293 producers) and Cicia Organic Island PGS (3'287 hectares, 180 producers), which are making a significant contribution to the PGS landscape. French Polynesia and New Caledonia are active participants with operational initiatives such as SPG Bio Fetia and Bio Calédonia PGS.
- New Zealand has its Organic Farm New Zealand initiative, which has certified 130 hectares of grazing land.

These efforts underscore the region's growing momentum in embracing participatory guarantee schemes for sustainable and organic agriculture.

Conclusion

In conclusion, the global landscape of PGS in 2023 shows a remarkable collective effort, with 64'740 initiatives spanning continents, involving 188'709 certified producers, and involving 1'823'525 individuals. Global trends indicate a positive shift towards organic and community-based agricultural practices with the widespread adoption of PGS initiatives.

General notes on the data

Every three years, IFOAM – Organics International conducts a global PGS survey. In 2022, the survey was conducted using the Global Map of PGS initiatives, bilateral remote communication with PGS initiatives coordinators, online national databases, and direct communication with competent authorities and PGS experts. No comprehensive survey was done in 2023. For some PGS initiatives, no new data was received; therefore, data from the previous year was used. PGS initiatives that have not submitted data for the past five years were considered to be no longer active and thus excluded from the current statistics.

In countries where PGS are recognised under the national organic regulation, data collected and published by competent authorities was used. This is the case in Brazil, Bolivia, Chile, Costa Rica, and India. Mexico and Peru also recognise PGS and general information is available online for those initiatives that are recognised by the competent authority, but many initiatives in both countries have been operational for years and are not included in the official registries, so additional data provided by local PGS experts and organic stakeholders was used, in addition to the official information available online.

Table 20: Participatory Guarantee Systems by Worldwide 2022

Source: IFOAM survey 2023. Please note that the 2022 data shown here, originally published in the 2023 edition of "The World of Organic Agriculture"¹ have been revised.

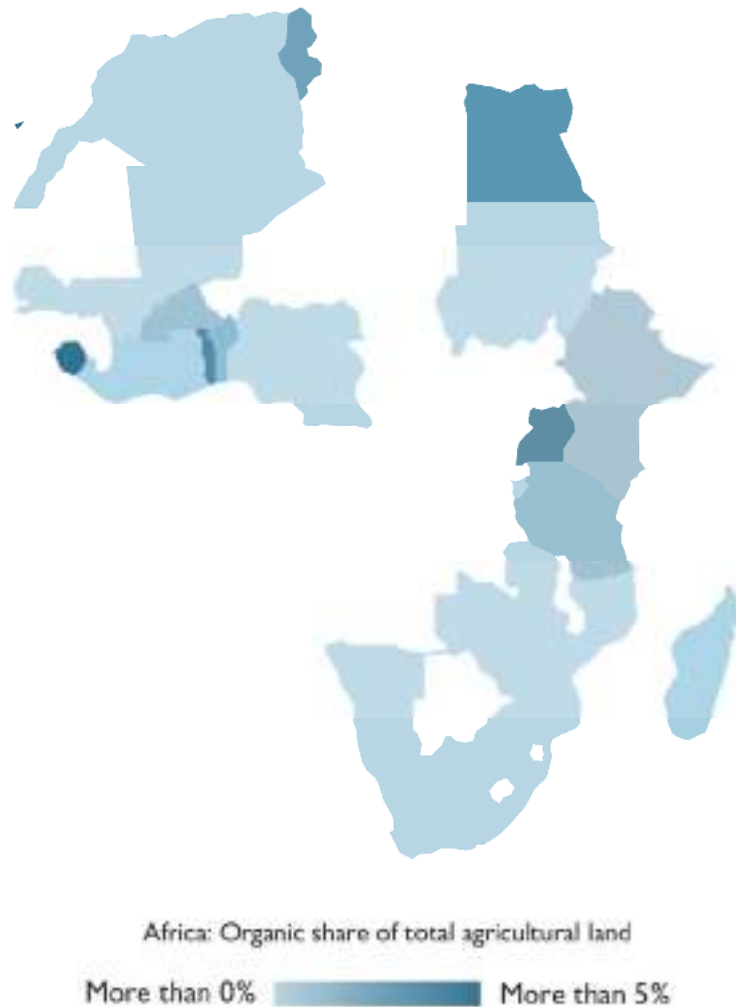
Country	Number of producers certified	Number of producers involved	Operational initiatives	Initiatives under development	PGS-certified land [ha]
Africa	7'736	27'643	37	13	34'110
Benin	472	805	2	0	236
Burkina Faso	864	1'476	1	0	180
Burundi		4'820	0	1	
Cameroon	40	160	1	0	
Ethiopia		30	0	1	
Ghana	36	500	1	1	120
Guinea		59	0	1	
Ivory Coast		35	0	1	
Kenya	1'078	1'587	1	0	1'442
Mali	250	1'352	1	0	112
Morocco	55	61	1	0	352
Mozambique	167	167	1	0	0
Namibia	5	9	1	0	26'502
Nigeria	706	706	1	0	45
Rwanda	0	158	0	1	
Sao Tome and Principe	13	40	1	0	2
Senegal	306	500	1	0	382
South Africa	386	4'244	14	4	523
Tanzania	2'320	2'716	5	1	3'605
Togo	573	979	3	2	603
Uganda	450	7'224	1	0	
Zimbabwe	15	15	1	0	6
Asia	160'049	1'724'687	64'531	32	1'055'284
Bangladesh		123	0	1	0
Bhutan		100	0	1	
Cambodia	26	132	0	7	2
China		1'129	0	3	
India	145'090	1'660'051	64'475	0	1'035'847
Indonesia	369	558	2	0	136
Japan	6	8	1	0	2
Kyrgyzstan	1'097	3'000	1	0	2'667
Laos	334	500	2	1	773
Malaysia	26	115	1	0	
Mongolia	6	35	2	0	4
Myanmar	304	304	1	0	379

¹ Willer, Helga; Schlatter, Bernhard and Trávníček, Jan (Eds.) (2023): The World of Organic Agriculture. Statistics and Emerging Trends 2023. Research Institute of Organic Agriculture FiBL and IFOAM - Organics International, Frick and Bonn. Available at <https://orgprints.org/id/eprint/45973/>

Participatory Guarantee Systems

Country	Number of producers certified	Number of producers involved	Operational initiatives	Initiatives under development	PGS-certified land [ha]
Nepal	171	301	7	5	15
Philippines	229	715	11	9	363
South Korea	780	2'200	1	0	207
Sri Lanka	408	837	1	2	224
Taiwan	233	729	2	0	500
Thailand	10'251	52'308	15	0	12'432
Vietnam	719	1'542	9	3	1'733
Europe	1'647	3'262	16	8	4'470
Belgium	90	224	2	0	0
Bosnia		5	0	1	
Czech Republic	8	15			
France	1'064	2'298	3	1	250
Germany	38	38	0	1	2'670
Italy	237	347	2	2	1'368
Spain	210	305	9	2	92
Turkey		30	0	1	90
Latin America	17'787	63'797	144	6	16'214
Argentina	20	40	1	1	170
Belize	12	30	0	1	
Bolivia	262	1'720	45	0	107
Brazil	8'908	9'054	29	0	2'564
Chile	264	264	24	0	908
Colombia	373	664	6	0	1'530
Costa Rica	69	74	7	0	187
Cuba		3'712	0	1	0
Ecuador	657	1'897	5	0	80
El Salvador	18	18	1	0	
Guatemala	25	50	1	0	1
Honduras			0	1	
Mexico	205	360	6	2	975
Paraguay	320	1'112	2	0	1'655
Peru	6'519	44'302	16	0	7'487
Uruguay	135	500	1	0	550
North America	766	876	1	1	8'440
Puerto Rico		10	0	1	
United States of America	766	866	1	0	8'440
Oceania	724	3'260	11	5	13'415
Australia	17	28	1	2	2'202
Cook Islands	4	17			23
Fiji	303	875	5	2	9'166
French Polynesia	67	115	1	0	323
New Caledonia	155	240	1	0	1'676
New Zealand	130	130	1	0	
Samoa		190	0	1	
Solomon Islands	48	54	1	0	25
Vanuatu		1'611	1	0	0
Total	188'709	1'823'525	64'740	65	1'131'933

Africa



Map 2: Organic agricultural land in the countries of Africa 2022

Source: FiBL survey 2024 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 335.

Developments in Organic Agriculture in Africa

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Introduction

Ecological Organic Agriculture (EOA) in Africa has continued to receive attention from various stakeholders, including farmers, practitioners, researchers, policymakers, and others, particularly in the wake of shocks caused by the COVID-19 pandemic, the war in Ukraine, conflicts in the Middle East, and other environmental crises. Various studies conducted on organic and conventional systems have demonstrated the potential of EOA to contribute to food security and nutrition, restore land degradation, alleviate poverty, mitigate climate change, and enhance resilience, among other socioeconomic and environmental benefits. Some of these aspects were central to the 1st Eastern Africa Agroecology Conference (EAAC) held in March 2023. Presentations at the conference highlighted the growth of EOA, the momentum it has gained, and the progress in organic policy adoption in countries such as Uganda and Tanzania.

The Ecological Organic Agriculture Initiative (EOA-I)

The Ecological Organic Agriculture Initiative (EOA-I), supported by the African Union (AU), the Swiss Agency for Development and Cooperation (SDC), and the Swedish Society for Nature Conservation (SSNC), among others, has reached out to numerous smallholder farmers across Africa. The initiative aims to integrate EOA into national agricultural production systems by 2025, to enhance agricultural productivity, food security, market access, and sustainable development in Africa. This objective will be achieved by scaling up ecologically and organically sound strategies and practices through activities such as institutional capacity development, scientific innovations, market system development, public policies and programs, outreach and communication, efficient coordination, networking, and partnerships in Africa.

2.5 million farmers reached

Based on the 2023 data, approximately 2.5 million farmers (42 percent women, 58 percent men) received information and knowledge about Ecological Organic Agriculture (EOA) to promote the adoption of organic farming. In addition, 1,281 value

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chain actors, including transporters, input suppliers, marketers, and consumers, were provided with various types of EOA information. This information and knowledge encompassed diverse areas such as crop management, soil fertility management, organic seed production and management, value addition, market intelligence, and organic standards and certification. The capacity of approximately 10,000 farmers to embrace EOA and agroecological practices was enhanced through training and field exchange events organized at national and continental levels by the implementing partners and executing agencies of EOA-I.

Forty-six knowledge products validated and availed to farmers

Knowledge management, achieved through the development and dissemination of knowledge products, plays a pivotal role in promoting the adoption of EOA. In this context, a total of 54 EOA knowledge products were created, with 46 of them being validated, packaged, and disseminated. These knowledge products cover a wide range of areas, including soil fertility management (preparation of quality manure and vermicompost), crop protection (crop rotation, mixed cropping, companion cropping), water harvesting and management, value addition in various agricultural enterprises, organic standards and certification, and livestock management.

EOA practices adopted by farmers.

In addition to knowledge about organic technologies and practices, the adoption rates of EOA practices and technologies were reported at 94.19 percent. The 9 countries where EOA is implemented reported positive adoption results. Mali led with the highest rate of farmer adoption at 99.7 percent, closely followed by Tanzania (99.6 percent) and Nigeria (99.0 percent). Uganda reported the lowest adoption rate at 86.8 percent.

Various communication pathways were used to stimulate adoption, including knowledge databases, farmer field days, exchange visits, training events, workshops, trade fairs, social media platforms (especially YouTube, Twitter, and Facebook), and websites. The multiplier approach involved training facilitators who, in turn, trained larger numbers of value chain actors.

A total of 202 value chain actors (128 male, 75 females, 44 youths) were reported to have adopted various EOA practices along the value chain. Various value chains were promoted, including herbs, honey, chia seeds, millet, sesame, vegetables (such as tomatoes, onions, fonio, carrots, and potatoes), and fruits (including plantains, bananas, pineapples, and strawberries). The number of farmers meeting organic market standards increased by 375, enabling them to access 40 different organic markets.

Proportion of agricultural land under EOA

According to 2023 data, there was a 37 percent increase in proportion of land under organic farming in the 9 countries EOA Phase II started compared to 2020 where the land increase was only at 6 percent. Benin (41 percent) and Ethiopia (40 percent) had

the highest increase in proportion of organic land under cultivation with Uganda reporting the least at 1 percent in 2023.¹

Increase in incomes of EOA farmers

In 2023, EOA farmers, on average, earned an annual income of 634 US dollars,² reflecting a 19 percent increase compared to the previous year. Kenya reported the highest increase in income among its farmers at 41 percent. Benin and Ethiopia had the highest reported incomes by farmers, with figures of 1'431.7 US dollars and 969.0 US dollars, respectively. Tanzania reported the lowest earnings at 113.0 US dollars. These increases can be attributed to the supportive structures in the establishment of organic markets, the formation of Participatory Guarantee System Groups (PGS), and extension support aimed at boosting the production volumes of organic products by farmers.

The volumes of EOA crops and livestock produced per year in 2023 increased by 39 percent, surpassing the previous year's increase of 36 percent.

Achievements at the national level

In November 2023, the Tanzania Organic Agriculture Movement (TOAM), operating under the EOA umbrella, hosted the 3rd National Ecological Organic Agriculture Conference in Dodoma. The conference brought together 200 delegates from the Eastern Africa region with the aim of accelerating existing initiatives and processes to transition EOA from dialogue to concrete actions and measurable results at the national level. The event also addressed policy-related issues and actions intended to support EOA in achieving the Sustainable Development Goals (SDGs). During the conference, the Tanzania Ecology Organic Agriculture Strategy was officially launched, marking a significant milestone for the development of EOA in the Eastern Africa region.

Achievements at the regional level

In March 2023, the Biovision Africa Trust (BvAT), along with its regional partners - the Ministry of Agriculture & Livestock Development, the Kenya Organic Agriculture Network (KOAN), the Biodiversity and Biosafety Association of Kenya (BIBA-Kenya), the Inter Sectoral Forum on Agrobiodiversity and Agroecology (ISFAA) and Pelum Kenya - convened the 1st Eastern Africa Agroecology Conference. The conference brought together over 500 stakeholders, including farmers, farmer associations, civil society organizations, private companies, academia, strategic partners, donors, and national and international NGOs.

The EOA partners continued to strengthen their collaborations with Regional Economic Communities (RECs). The EOA-I Regional Secretariat for Eastern Africa actively engaged with the East Africa Community (EAC) to develop a joint agroecology strategy. Additionally, the Economic Community of West African States (ECOWAS)

¹ Editors' note: Please note that some of the area data presented here include wild collection. Please also note that some of the data presented here differ from the data in other parts of this book.

² 1.06 US dollars corresponded to 1 euro in 2023.

provided support for the development of regional policies and resource mobilization in favour of EOA in West Africa.

The African Union Commission (AUC), the Southern African Development Community (SADC), and the EOA Initiative Secretariat organized a webinar that attracted more than 200 stakeholder organizations from Southern Africa. The aim of this webinar was to establish the EOA-I Southern Africa Regional Platform. Currently, the EOA-I has two active regional platforms in Western and Eastern Africa, and there are plans in progress to strengthen the Central Africa regional platform and establish Northern and Southern Africa platforms.

Policy works at the continental level

The EOA Initiative of the African Union, under the guidance of the African Union Commission-Department of Agriculture, Rural Development, Blue Economy, and Sustainable Environment (AUC-DARBE), chaired the Continental Steering Committee (CSC). This initiative has achieved significant policy milestones, including the reporting of the status and progress of the AU Decision on Organic Agriculture for the first time in the 3rd Comprehensive Africa Agriculture Development Programme (CAADP) Biennial Review Report (2015-2021).

Further advancements have been made in the 4th CAADP Biennial Review, where three parameters related to EOA/Agroecology under the indicator, share of agriculture land under sustainable land and water management including Climate Smart Agriculture (CSA) practices (SSLWM) were adopted, data were collected from the countries, and they have been included in the current analysis. The Farmer Managed Seed System (FMSS) cluster received substantial support from the 3rd Steering Committee of the African Seed and Biotechnology Partnership Platform (ASBPP), which endorsed a scoping study to review and update the existing knowledge on seed systems in Africa, with a particular focus on the informal sector and FMSS. This study is being supported and commissioned by the European Commission International Partnerships (DG INTPA)¹.

Parameter 3.1i d: Organic fertilizer use

Indicator 3.1i in the CAADP Biennial Review process tracks total fertilizer use, including organic fertilizers, in kilograms without specifying nutrient breakdowns. It's important to note that organic fertilizer data can't be mixed with inorganic fertilizer data based on nutrients but only by weight, which can be more complex to track.

Among 47 Member States submitting data, 21 provided complete datasets for the first time. Six countries reported varying organic fertilizer use in 2022 and these included Rwanda (5,684 kg/ha), Togo (623 kg/ha) and Rep. A. Saharawi (194 kg/ha), Egypt (98 kg/ha), Burundi (55 kg/ha), and Ethiopia (38 kg/ha). The remaining 15 countries

¹ This will be coordinated by the Development Smart Innovation Through Research in Agriculture (DeSIRA) Initiative for Agri-Food Systems Transformation at Wageningen University.

reported lower volumes, ranging between 1 and 3 kg of organic fertilizer per ha. The other 26 countries either had no data on organic fertilizers, or reported zero kg of fertilizers, between 2015 and 2022.

Methods for estimating organic fertilizer quantities vary, with some countries reporting farm-level compost use and others commercialized products. Mainstreaming organic fertilizer use is crucial for soil health and sustainability.

Developing standardized nutrient measurement procedures and farmer training can improve and sustain soil health, authenticate organic fertilizers, and enhance transparency in the industry.

Parameter 3. Iviii: Seed performance index and status of farmer managed seed systems in national seed policy instruments and institutional arrangements

A total of 43 countries reported that there is some form of national discussion concerning Farmer Managed Seed Systems (FMSS). Among them, 18 countries documented progress exceeding 70 percent, indicating the presence of enabling conditions like policies, strategies, proclamations, ordinances, investments, or programs. In the remaining countries, there was partial recognition of FMSS by the governments.

Parameter 6. Iii: Agriculture area under Ecological Organic and Agroecological (EOA) practices in hectares

A total of 33 African countries, representing 60 percent, have reported the proportion of agricultural land dedicated to Ecological Organic Agriculture (EOA) or Agroecology. Botswana had the largest area under EOA, with 25.6 million hectares, while Liberia reported the smallest, with just 2 hectares. However, there were significant variations in the way countries reported this indicator.

Among the nine project countries under Swiss Agency for Development and Cooperation (SDC) support, Mali reported the highest EOA land at 3.2 million hectares, followed by Benin Ethiopia and Morocco with each having 1.0 million hectares, Uganda (505'000 hectares), Tanzania (286'000 hectares), Kenya (123'000 hectares), and Nigeria (58'000 hectares). Other countries with substantial EOA land included Tunisia (325'000 hectares), Egypt (116'000 hectares), and South Africa (97'000 hectares). Countries with smaller EOA land included Cameroon (1'969 hectares), Mozambique (1'404 hectares), and Equatorial Guinea (510 hectares). The 60 percent reporting success rate for this parameter highlights the availability of EOA data, with room for improvement to achieve 100 percent reporting in the future.¹

These developments signify progress towards integrating EOA into National Agricultural Investment Plans (NAIPs) and Regional Agricultural Investments Plans (RAIPs) by 2025, as outlined in the current EOA Initiative Strategic Plan. Preparations are underway to review and develop a strategy for the 2025-2035 period, supported by

¹ Editors' note: Please note that some of the area data presented here include wild collection. Please also note that some of the data presented here differ from the data in other parts of this book.

the European Commission International Partnerships (DG INTPA) through Desira-Lift Initiative.

It's important to note that the EOA Initiative Strategic Plan aligns with discussions on post-Malabo¹ and the future of the CAADP Biennial Review Report, both spanning a ten-year period (2025-2035). This presents an opportunity to harmonize the EOA Initiative with post-Malabo outcomes.

The Knowledge Centre for Organic Agriculture and Agroecology in Africa

The Knowledge Centre for Organic Agriculture & Agroecology in Africa (KCOA) is part of the German BMZ's² initiative "ONE World – No Hunger." The project is motivated by the multifunctional and sustainability-enhancing aspects of EOA/agroecology, which result in the following benefits:

- They promote soil health, increase water and CO₂ storage in soils, and enhance the resilience of agricultural systems (ecological sustainability).
- They enhance the availability of healthy, high-quality food in local markets, even in rural areas, thereby addressing food security.
- They establish organic and agroecological value chains that create employment opportunities for rural populations, particularly youth and women, contributing to economic sustainability.
- They foster sustainability by reducing reliance on synthetic fertilizers and pesticides, decreasing dependence on fossil fuels, and mitigating price fluctuations (economic sustainability).
- They empower and offer prospects for rural communities by gathering, processing, and disseminating knowledge on EOA/agroecology, thereby supporting social sustainability.

The project is coordinated by the German Agency for International Cooperation (GIZ) and aims to strengthen actors in regional knowledge hubs and their networks across Eastern, Southern, West, North, and Central Africa, with the goal of promoting organic agriculture and agroecology. The regional hubs are located as follows:

- West Africa: Senegal, Benin, Gambia, Mali, and Nigeria
- Eastern Africa: Uganda, Kenya, Tanzania, Rwanda, and Madagascar

¹ The Heads of States and Government of the African Union, who met in June 2014, in Malabo, Equatorial Guinea adopted two Decisions and two Declarations which directly relate to "Comprehensive Africa Agriculture Development Programme" CAADP and Africa's agricultural transformation and food security agenda in the 2015-2025 decade. More information about the Malabo Declaration can be found at <https://www.nepad.org/caadp/publication/synthesis-of-malabo-declaration-caadp-and-other-related-au-decisions>

² 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>.

- Southern Africa: Zambia, Namibia, South Africa, and Malawi
- Northern Africa: Egypt, Morocco, and Tunisia
- Central Africa: Hub based in Cameroon

The integration of these five regional knowledge hubs is addressed through four main strategies (for further details, refer to Amudavi et al. 2023): the Integrated Knowledge Management Systems Strategy, the Dissemination and Capacity Building Strategy, the Market Systems Development and Networking Strategy and the Advocacy Strategy.

Multiple activities of the regional knowledge hubs

So far, the project has achieved the following milestones:

- Reached 5 million farmers and value chain stakeholders across Africa.
- Connected 500 organizations in the organic sector.
- Created over 6'000 knowledge products in over 20 languages for 20 countries.
- Assisted 1'700 businesses with PGS certification.
- Trained 470'000 farmers and their families.
- Trained 5'000 multipliers, including 150 master trainers, in 18 countries.

The Continental Digital Knowledge Platform is gaining traction, serving as a platform to disseminate relevant knowledge on organic agriculture and facilitate web-based networking with international and regional organizations, initiatives, and networks.

Examples of initiatives by the regional knowledge hubs include:

- The Knowledge Hub for Organic Agriculture and Agroecology in North Africa (KHNA) promoting the "Farms 4 Climate" program in Egypt, certifying small farms converting to organic practices and achieving significant CO2 savings and storage.
- The Knowledge Hub for Organic Agriculture and Agroecology in West Africa (KHWa) organizing "Week-End Bio" events in Senegal to promote organic food distribution and raise awareness about organic farming and healthy diets, with plans to expand to Mali, Benin, and Nigeria.
- The Knowledge Hub for Organic Agriculture & Agroecology in Eastern Africa (KHEA) initiating the "Farmers' Caravan" involving trained farmers and multipliers visiting organic farms to exchange ideas and promote organic agriculture, reaching over 2'000 farmers and launching the "Know What You Eat" campaign to increase awareness of organic food.
- The Knowledge Hub for Organic Agriculture & Agroecology in Southern Africa (KHSA) training 20 pollinator-multipliers, 18 PGS groups, and 345 farmers in South Africa as part of the "Participatory Guarantee System (PGS) Pollinator Programme" to support local food systems and organic growers.

- The Knowledge Hub for Organic Agriculture in North Africa leads in the number of knowledge products uploaded on the continental digital knowledge platform, followed by the Knowledge Hub for Organic Agriculture Eastern Africa (KHEA), which has the highest number of knowledge products validated for future upload.

Governance and institutional development

New SDC-supported Agroecology Promotion Programme (APP)

The Continental Steering Committee (CSC), chaired by the African Union (AU), continued to provide support and oversight for the implementation of the African Union Decision on Organic Agriculture in Africa. The 19th and 20th CSC meetings took place in July and December 2023 at the African Union Commission's Headquarters in Addis Ababa, Ethiopia, and Kigali, Rwanda, respectively.

During the July meeting, the CSC was informed about the conclusion of the EOA Phase II in April 2024, supported by the Swiss Agency for Development and Cooperation (SDC). A concept note for a new Agroecology Promotion Programme (APP) was presented, which will be executed in Sub-Saharan Africa and South-East Asia. The new program involves new partners, including the Agroecology Coalition and IFOAM - Organics International, with Biovision Africa Trust overseeing the grant for the Sub-Saharan component over four years.

Additionally, the AUC and the EOA Initiative Secretariat organized the 20th CSC meeting in Kigali to support the hosting of the 5th Africa Organic Conference held from December 12 to 15, 2023. Within the conference organization, the AUC and its EOA-I Secretariat managed the policy track.

Implementation of EOA in Africa: Current and future activities

The African Union-supported Continental Steering Committee (CSC) of the EOA-I continued to provide strategic guidance and support for the implementation of EOA in Africa despite the ongoing challenges posed by COVID-19. The 17th and 18th African Union CSC meetings were conducted in South Africa and Kenya, respectively.

In 2022, several significant decisions and resolutions were made. These included the establishment of a continental EOA multi-stakeholder platform, which will be led by the EOA-I Secretariat and AfrONet. Additionally, a resource mobilization strategy was developed to extend support for EOA initiatives beyond Eastern and West Africa, encompassing all five regions of the continent. Streamlining the organization of the African Organic Conference was another important decision.

Furthermore, the CSC endorsed two studies to be conducted in 2023 by Biovision Africa Trust, with support from the Swiss Agency for Development and Cooperation (SDC). These studies aimed to assess the status of EOA initiatives across the continent and explore the role of youth in agroecology.

Data on the status of organic agriculture

Efforts to gather reliable organic agriculture data in Africa are ongoing, including the development of indicators integrated into reporting processes and a commissioned study to assess EOA initiatives and improve data collection for the future.

These indicators encompass:

- The presence of a national policy supported by budgetary allocation.
- The existence and implementation of organic regulations.
- The availability of national standards and certification.
- Government support for the organic sector.
- The involvement of civil society in EOA sector development.
- The performance of both domestic and export EOA markets.

Additionally, a study commissioned by the African Union, the Swiss Agency for Development and Cooperation (SDC) and Biovision Africa Trust has been initiated to assess EOA initiatives, programs, and projects across Africa. This study samples the five regions for Malabo-compliant National Agricultural Investment Plans and Regional Agricultural Investment Plans related to the African Union Decision on organic agriculture. The process aims to improve future EOA data collection and availability.

Achievements by the African Organic Network (AfrONet)

AfrONet, the continental umbrella organization of African organic actors, was founded in 2012 to lead, unite, network, and foster the growth of the African organic sector. Its focus includes policy dialogue, capacity building, information dissemination, and support for organic value chain development and trade. AfrONet collaborates with national, regional, and continental networks, movements, and associations to advance organic agriculture across Africa. As a member of IFOAM - Organics International, AfrONet actively engages with key actors on the continent.

Regional Networks

AfrONet has established connections with regional networks such as the Southern African Network for Organic Development (SANOD) and the IFOAM Southern African Network (ISAN). Other relevant regional networks include the West Africa Organic Network (WAfrONet) and National Organic Agriculture Movements/Networks (NOAMs) in Central and Eastern Africa, as well as the emerging Northern Africa cluster. AfrONet has initiated the establishment of a National Organic Agriculture Movement (NOAM) in Egypt, a crucial step toward strengthening its presence in North Africa. The "Organic Egypt project" is expected to transition into a NOAM by 2024 and collaborate with the Moroccan Interprofessional Federation for Organic Agriculture (FIMABIO). Together with the Organic Agriculture Movement in Tunisia, these NOAMs aim to create a dynamic North Africa Organic Network platform.

AfrONet Memberships

Currently, AfrONet has NOAMs from 27 countries as members. The new AfrONet strategic plan for 2023-2028 outlines a roadmap for establishing NOAMs in the remaining 28 countries by 2028. To facilitate this, AfrONet has developed a guiding tool for NOAM formation and strengthening, set to be operational from 2024. AfrONet has played a pivotal role in convening networks, partners, and stakeholders through the African Organic Conference.

Assessment of National Organic Agriculture Movements/Networks (NOAMS)

AfrONet has assessed National Organic Agriculture Movements/Networks across the continent to evaluate their capacity to provide technical support and strengthen their operations. This online process has informed the development of AfrONet's five-year strategic plan for 2023-2028.

Upcoming West African Organic Conferences

The 7th West African Organic Conference is scheduled for Senegal in 2024, with the 8th edition planned for Togo in 2026. These conferences are held biennially and coordinated by the West African Organic Network.

The 5th Africa Organic Conference held in 2023

The African Organic Conference, a triennial gathering of organic practitioners in Africa, took place successfully in Kigali, Rwanda from December 12 to 15, 2023. The conference convened 180 in-person attendees in Kigali, with an additional 120 participants joining virtually from across Africa and beyond. The event focused on critical issues related to the advancement of organic agriculture in Africa under the theme "Strengthening Resilient and Sustainable Food Systems in Africa through Organic Agriculture."

Rwanda Organic Agriculture Movement (ROAM) served as the host of the conference, while AfrONet continued its role as the convener of this multi-stakeholder gathering. The conference culminated in a "Call for Action" addressing several key concerns, including: The adoption of Participatory Guarantee Systems (PGS) at continental, regional, and national levels; quality control measures within organic production systems; integration of organic farming practices across agricultural, trade, environmental, and related sectors; long-term funding support for organic and agroecological research and experiments in Africa; promotion of both domestic and international markets for organic products and initiatives to halt the importation of highly hazardous agricultural chemicals, prohibited globally and detrimental to organic farming, into Africa.

Institutional Innovations for Organic Agriculture in Africa (IIABA) Project

The IIABA project, funded by the French Development Agency (AFD) and implemented in Uganda, Morocco, and Tanzania from December 2019 to December 2023, introduced significant institutional innovations. These innovations encompassed:

- Identifying institutional innovations to scale up organic agriculture in Uganda, Morocco, and Tanzania.

- Enhancing the capacities of AfrONet and its member organizations.
- Disseminating targeted institutional innovations to partner countries and within AfrONet.

Project partners included 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).

Under IIBA, three digital platforms for organic product sales were established. NOGAMU in Uganda spearheaded local organic markets in Kampala and Entebbe. An open-source software for PGS peer-review visits was developed and tested, and the project organized the first PGS workshop for experience-sharing among members from various African regions. UGOCERT, Uganda's organic certification body, was revitalized with the training of fourteen new inspectors. The NOAMs Formation and Strengthening Guide developed through IIBA will extend its impact beyond the existing 27 African countries with NOAMs.

In the policy arena, IIBA supported three public policy studies in Tanzania, Uganda, and Morocco, with the findings to be used for generating policy briefs to advocate for policy changes favouring organic agriculture and agroecology. Additionally, the project contributed to the 3rd National Ecological Organic Agriculture Conference hosted by TOAM in Tanzania in 2023, resulting in the launch of the National Ecological Organic Agriculture Strategy for Tanzania. The Tanzanian government committed to appointing an Organic Agriculture focal person and allocating a budget to support the organic sub-sector in the upcoming financial year.

The Network of Organic Agriculture Researchers in Africa (NOARA)

NOARA, the Network of Organic Agriculture Researchers in Africa (www.noara.bio), continued its mission of spearheading African organic agriculture research, extension, training, and value chain development, along with engaging in lobbying and advocacy efforts for organic and ecological agriculture research at high levels. In 2023, NOARA expanded its membership, welcoming new members from within and outside Africa, including Europe and North America. The network now boasts over 400 members from 29 countries, all dedicated to advancing organic agriculture activities in Africa.

During the year, NOARA achieved several milestones, including the publication of Volume 6 of the African Journal of Organic Agriculture and Ecology (AJOAE), which can be accessed at <https://publications.noara.bio/current-journal-editions>. Additionally, the Proceedings of the 1st African Organic Research Conference are available at <https://publications.noara.bio/1st-afrorec>.

NOARA embarked on the process of developing a demand-driven 10-year Organic Agriculture Research Agenda for Africa. This initiative began with a roadmap for facilitating National Organic Research Dialogues in various African countries, guided

by comprehensive research questions designed to address identified research gaps in collaboration with multiple stakeholders in the organic agriculture sector.

Furthermore, NOARA played a pivotal role in hosting the Continental Planning Committee for the 5th African Organic Conference (AOC) and led the Research Track of the conference held in Kigali, Rwanda from December 12 to 15, 2023. The network also partnered with the Research Institute of Organic Agriculture FiBL and made a presentation in the Science Agenda segment of the 2023 Biofach event. Additionally, NOARA actively supported AfrONet's bid for the Agroecology Programme by the Swiss Agency for Development and Cooperation (SDC) and participated in the inaugural Asia Organic Innovation Summit held in Xichong, China.

Conclusion

Regions and countries are re-evaluating their approaches to redesign their food systems in response to emerging global challenges. Consequently, based on scientific and practical evidence, various stakeholders in Africa, in collaboration with development partners, are directing their efforts toward investing in systems, innovations, and opportunities that promote sustainable food systems, ultimately enhancing the productivity, resilience, and profitability of smallholder farming systems across the continent. These investments encompass research, the development of ecologically sustainable practices, and initiatives aimed at cultivating markets for organic produce, all of which contribute to the establishment of sustainable food systems in Africa.

Realizing a brighter future for the organic sector necessitates the commitment of governments, farmers and their organizations, development partners, and the private sector to allocate resources to research, policy development, and programs that create platforms for sharing experiences, learning, and collaboration. This collaborative effort lays the foundation for poverty reduction and ensures sustainable, long-term food and nutrition security in Africa.

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Organic Agriculture in Africa: Key Facts and Figures

JAN TRÁVNÍČEK,¹ BERNHARD SCHLATTER² AND HELGA WILLER³

In 2022, the organic sector's development in Africa was characterised by continued growth in all key indicators.

More than 2.7 million hectares of farmland were organic in Africa in 2022 – Uganda had the largest area

In Africa, more than 2.7 million hectares were managed organically in 2022. Over 2.8 percent of the world's organic farmland was in Africa. With more than 505'000 hectares, Uganda had the largest farmland area under organic management, followed by Tanzania (over 313'000 hectares), Ethiopia (over 238'000 hectares) and Tunisia (nearly 228'000 hectares). Nearly half of Africa's organic farmland was in these four countries.

African organic farmland increased by more than 392'903 hectares

Organic land increased by more than 127'500 hectares in Africa in 2022, representing an increase of 4.9 percent. In the decade 2013 to 2022, organic farmland grew by 127 percent and thus at a faster rate as global organic farmland.

Sao Tome and Principe is the country with the highest organic area share in Africa

Organic farmland in Africa constituted 0.2 percent of the total agricultural land of the continent and was thus below the global organic area share of 2.0 percent in 2022.

The country with the highest organic area share was Sao Tomé and Príncipe, with an impressive share of 21.1 percent, thus making it on the world list of 21 countries with an organic area share of more than 10 percent of total farmland (and one of the four countries with a higher area share of 20 percent). Sao Tomé and Príncipe was followed by Sierra Leone and Réunion, which both had an organic farmland share of nearly 5 percent.

Key crops grown are textile crops, cocoa, coffee, nuts and olives

More than half of the organic farmland in Africa is for permanent crops (1'603'945). Among the key crops was cocoa (312'857 hectares), mainly from Sierra Leone and Democratic Republic of Congo, coffee (264'488 hectares) mainly from Ethiopia and nuts (257'737 hectares) mainly from Kenya, Burkina Faso and Côte d'Ivoire.

Arable land accounted for approximately 34 percent of total organic land in Africa in 2021. Among the key crops were textile crops (318'101 hectares) mainly from Tanzania, oilseeds (264'487 hectares) mainly from Togo, and root crops (66'303 hectares).

¹ Jan Trávníček, Czech Organics, Staré Město, Czech Republic, www.czechorganics.com

² Bernhard Schlatter, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

³ Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

Organic producers, processors and importers: Data situation not satisfactory

There were more than 975'000 organic producers in Africa, with the largest numbers in Uganda (more than 400'000). More than a fifth of the world's organic producers were in Africa. Compared to 2021, almost 59'000 less (5.7 percent down) organic producers were counted, mainly due to a significant decrease of number of producers in Tanzania. However, not all certifiers – who are the main source for data from Africa - provide data on the number of individual producers; hence it may be assumed that the number of producers is higher than the number shown in this report. A total of 1'302 exporters and 1'595 processors were counted. Again, reporting is not consistent over the years, and the data is not complete.

Retail sales: Data almost non-existent

Organic retail sales for Africa do not exist. Kenya is the only country that provides data occasionally. This does, however, not mean that there is no domestic market for organic products in Africa. Many countries have developed local markets.

Organic exports – strong growth continued

While data on the domestic market are almost not non-existent, data on organic export volumes in metric tons to the European Union, which is the major export market for Africa, has been available since 2018. Export data to the US has been available even for longer (since 2014) but are less significant (6 percent of EU/US organic exports from Africa in 2022) and do not cover all export products.

Data show that in 2022 more than 555'000 metric tons of products were exported from Africa to the EU and US, constituting 11 percent of all organic exports to these countries/trade blocks. In the 5-year period 2018 to 2022, African exports increased by almost 90 percent, thus considerably faster than global organic exports to the EU and US, which grew by only 9 percent in the same period.

Togo is the largest exporter

The largest African exporter was Togo (more than 160'000 metric tons of products, 97 percent of which is soybeans), followed by Tunisia (59'000 metric tons, mainly olive oil) and Egypt (41'000 metric tons, mainly potatoes and onions).

Soybeans are the most important export product

With more than 195'000 metric tons and more than 35 percent of the African organic exports, soybeans and soybean products was the most important product group, followed by oils (62'000 metric tons, mainly olive oil) and bananas (41'000 metric tons).

For detailed data on organic agriculture in Africa, please refer to the tables provided in the Annex, section 2.1 Organic Agriculture in Africa: Tables, page 308.

Organic Agriculture in Africa: Graphs

Africa: The ten countries with the largest organic agricultural area 2022

Source: FiBL survey 2024

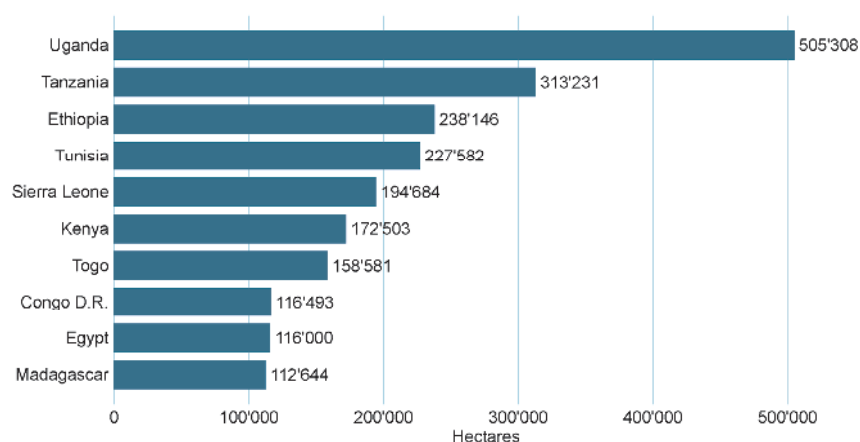


Figure 54: Africa: The ten countries with the largest organic agricultural area 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Africa: The ten countries with the highest organic share of total agricultural land 2022

Source: FiBL survey 2024

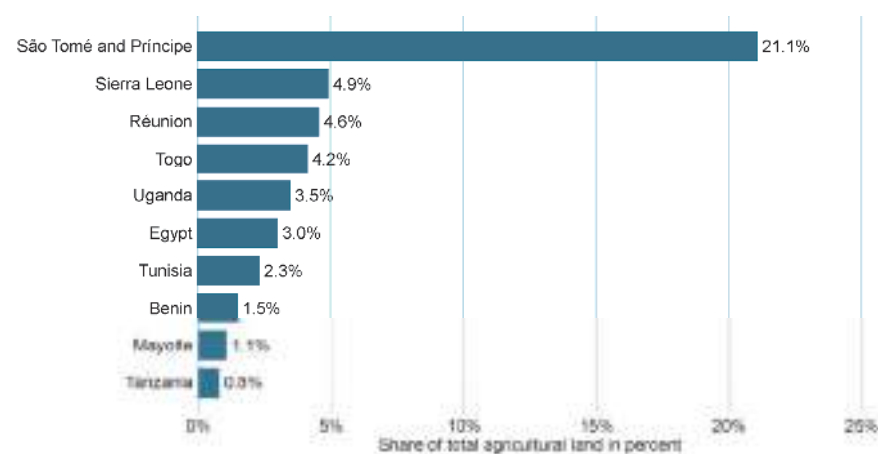


Figure 55: Africa: The countries with the highest organic share of total agricultural land 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Africa: Development of organic agricultural land 2000 - 2022

Source: FiBL-IFOAM-SOEL surveys 2001-2024

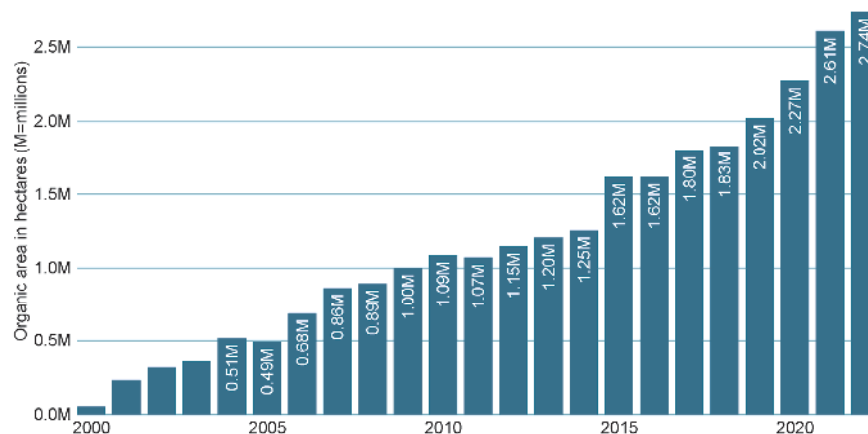


Figure 56: Africa: Development of organic agricultural land 2000-2022

Source: FiBL-IFOAM-SOEL-surveys 2001-2024

Africa: Use of organic agricultural land 2022

Source: FiBL survey 2024

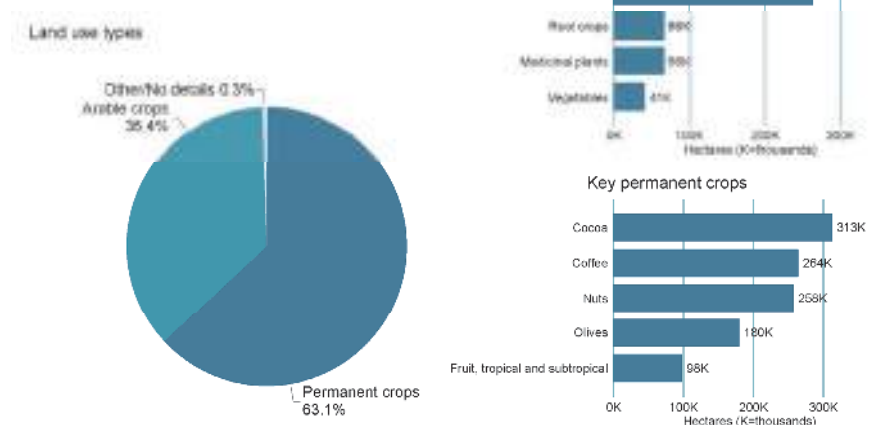


Figure 57: Africa: Use of organic agricultural land 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Africa: Key commodity groups exported to the EU and US in 2022

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

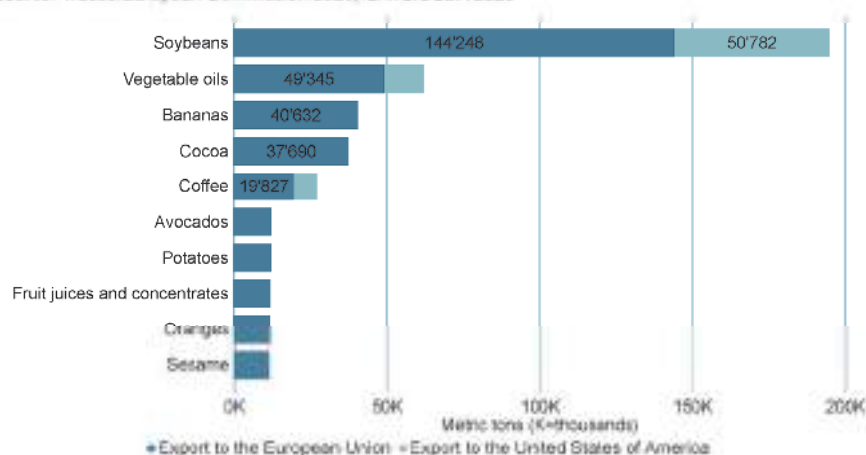


Figure 58: Africa: Commodities exported to the EU and US (export volume in MT)

Source: TRACES/European Commission, GATS/ USDA, compiled by FiBL. For detailed data sources, see annex, page 335.

Africa: Key EU and US export countries in 2022

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

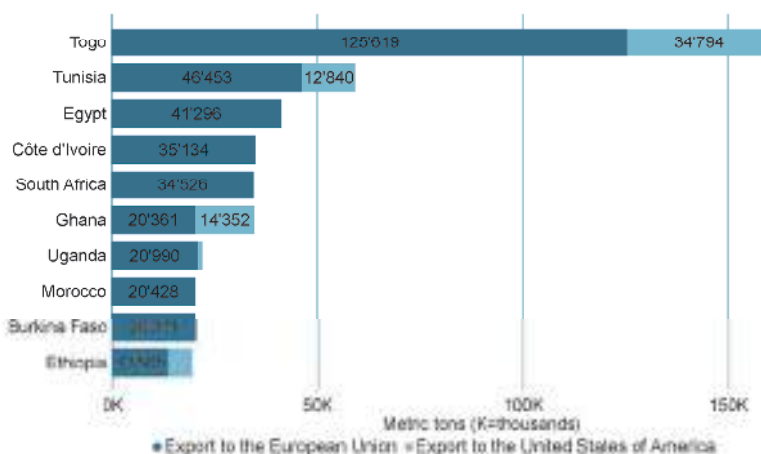


Figure 59: Africa: Key countries exporting to the EU and US (export volume in MT)

Source: TRACES/European Commission/GATS USDA, compiled by FiBL. For detailed data sources, see annex, page 335.

Asia



Map 3: Organic agricultural land in the countries of Asia 2022

Source: FiBL survey 2024 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 335.

Developments in the Organic Sector in Asia

IFOAM – ORGANICS ASIA¹

In 2023, the organic sector in Asia continued to experience significant developments.

The Chinese government made revisions to its organic product certification regulations, with the new regulations taking effect on November 1, 2022. Additionally, mutual recognition arrangements for organic product certification were established between China and New Zealand.

South Korea faced challenges as government budget cuts affected funding for environmentally friendly agriculture. Amendments were introduced to certification processes to address concerns about unintentional contamination of organic products.

Bhutan implemented its Local Organic Assurance System, while India saw increasing adoption of the Participatory Guarantee System (PGS). In Indonesia, the Indonesia Organic Alliance introduced its own version of PGS called "PAMOR Indonesia."

Many countries in the region witnessed the rapid growth of private enterprises involved in the organic market, particularly in Bangladesh.

Several governments launched comprehensive plans to support the organic sector. Japan took a leading role by implementing Japan's Sustainable Food Systems Strategy (MeaDRI)² across 47 prefectures and recognizing ninety-one local municipalities as "Organic Villages."

Kyrgyzstan established a comprehensive roadmap for the "Five Years of Action for the Development of Mountain Regions" initiative, focusing on organic agriculture.

The Kingdom of Saudi Arabia developed an integrated support system for its organic sector, encompassing legal, supervisory, technical, and logistical aspects.

These developments underline the growing significance of organic agriculture in Asia, with various countries making strides in regulation, certification, and market expansion.

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² More information about Japan's Sustainable Food Systems Strategy (MeaDRI) can be found here: <https://www.jcpa.or.jp/english/meadri.html>

Bangladesh

Mohammad Khurshid Alam¹ and Shaikh Tanveer Hossain²

There has been a noticeable surge in businesses related to organic products in recent times. Ayurvedic, herbal, natural, and organic cosmetic products, predominantly derived from botanical ingredients, are gaining popularity as people embrace eco-friendly lifestyles. Many enterprises³ have begun incorporating natural elements into their commercial production processes. Products such as aloe vera gel, saffron brightening gel, face packs made from Chandan wood, and saffron-infused goat's milk are increasingly sought after for their beneficial effects on skin and hair quality.

Private companies are collaborating with new farmers to cultivate organic vegetables within their tourist or holiday resorts, offering customers access to fresh organic produce. A well-established company, Square Toiletries, has introduced two popular organic products: "Maya All-Natural Scalp and Hair Oil" and "Marula Oil," both derived from aromatic herbs.

Some eco-tourism sites and business entrepreneurs have ventured into organic product manufacturing and initiated direct sales to customers from their farms. Visitors not only purchase these products but also enjoy spending time on the farms as part of their tourism experience. An exemplary success story is the Organic Farm and Eco-Park Public Limited, located in the low-lying areas of the Chittagong Hill tracts.

In addition, organic sweet Mandarin orange orchards have been established, covering an impressive 390 hectares in the south-western region of Bangladesh. These organic products are now available at domestic grocery outlets and retail shops in major cities. Similarly, organic cultivation of cashew nuts and coffee has commenced in hilly regions, although the harvest is yet to materialize. These developments underscore the growing trend towards organic and eco-friendly practices in Bangladesh.

Bhutan

Kesang Tshomo⁴

As of June 2023, Bhutan's organic agriculture sector has achieved notable progress:

The total area dedicated to organic agriculture has expanded to 14'099.54 acres (5'706 hectares), reflecting a commitment to sustainable farming practices.

Certification under both the Local Organic Assurance System (LOAS) and third-party certification according to the Bhutan Organic Standard (BOS) has steadily increased, signifying a growing adoption of organic practices.

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² Dr. Shaikh Tanveer Hossain, Director, policy and Strategy, IFOAM-Organics Asia

³ Ribana, Meena Herbal, Aarong Earth, Newfarmers, and Sosha Probortona.

⁴ Kesang Tshomo, Organic Sector Development Specialist, Programme Manager, National Organic Flagship Programme, Department of Agriculture, Ministry of Agriculture and Forests, Bhutan

Bhutan has seen a rise in the number of products certified under the Bhutan Organic Standard (BOS), totaling 65. Some of these certified products have made their way to international markets, including Malaysia, Singapore, and Europe.

Crop production, wild collection of non-wood forest products, and rangeland management have all experienced growth, driven by product diversification in the market.

Several villages have been designated as model organic villages, employing an innovative approach that combines organic conversion with economic development. These villages are connected to markets and local processors, with support provided for trial marketing to the private sector and participation in international expos.

To support the transition of farms and enhance crop production, comprehensive capacity-building programs have been implemented for farmers, processors, and traders. This equips them with the necessary skills and knowledge to meet market requirements and standards, enabling market access.

The private sector has witnessed an increasing number of entities obtaining international organic certification, granting them access to the European Union (EU) market.

Efforts to raise awareness and promote organic farming include the organization of "Organic Field Day" events, exhibitions, workshops, and demonstrations to educate the public about organic farming practices.

Institutional strengthening within the organic sector includes the establishment of three laboratories dedicated to organic research, microbiology, and biopesticides. Additionally, the completion of an "Organic Sales Market" as part of the National Organic Flagship Programme further fortifies the industry.

Standards and regulations have been reviewed and updated, encompassing revisions to the Bhutan Organic Standard (BOS), the introduction of standards for organic inputs, and the registration of international certification bodies operating in Bhutan. Marks and logos for certification have also been registered and distributed for use.

An updated version of the farmers' diary, now bilingual in Dzongkha and English, has been introduced. This diary is distributed to all registered organic farmers and aids in documenting daily operations, facilitating organic inspections for certification through both the Local Organic Assurance System and third-party certification.

Bhutan has initiated trial exports of fresh vegetables to Singapore in collaboration with the private sector, opening up new trade opportunities.

These collective efforts demonstrate Bhutan's dedication to nurturing a thriving organic agriculture sector while upholding rigorous standards and regulations. This holistic approach ensures sustainability, market access, and the promotion of organic farming practices.

China

Yuhui Qiao¹

The State Administration for Market Regulation implemented revisions to the "Measures for the Administration of Organic Product Certification,"² effective as of November 1, 2022. This initiative aimed to enhance service efficiency and establish standardized protocols for accreditation management. In line with this objective, the Secretariat of the China National Accreditation Service (CNAS) introduced a certification body accreditation business management platform³, which officially commenced operations on the same date.

Furthermore, the China Organic Product Certification Working Group conducted two working meetings to assess 228 products using the guiding principles of "orderly promotion and dynamic adjustment".⁴ As a result of these evaluations, certain products, including lotus root and round leaf rhubarb (edible rhubarb), were incorporated, and specific products underwent modifications. Additionally, enhancements were made to the catalog notes, and adjustments were implemented in the product serial numbers to further refine the catalog's content.

On February 8, 2022, the National Certification and Accreditation Administration issued Announcement No. 3 of 2022, outlining the implementation of mutual recognition arrangements for organic product certification between China and New Zealand. This announcement included details on the list of prohibited substances for use in organic products exported by both parties, the format of English certification certificates for organic products destined for New Zealand, as well as the management of New Zealand certification agencies and organic certification labels.

Subsequently, on August 30, 2022, the Jiangsu-Russia Organic Product Export Certification Exchange Conference was successfully conducted, utilizing a combination of online and offline methods. This exchange meeting played a pivotal role in facilitating the introduction of high-quality, environmentally friendly Russian organic products into the Jiangsu market in China.

¹ Professor Dr. Yuhui Qiao, China Agricultural University, Beijing, China

² Under the "Decision of the State Administration for Market Regulation on Amending and Abolishing Some Departmental Regulations" (Order No. 61 of the State Administration for Market Regulation on September 29, 2022)

³ CNAS certification body accreditation business management platform: <https://cims.cnas.org.cn>

⁴ In accordance with the "Change Procedure for Organic Product Certification Catalogue" issued by the National Certification and Accreditation Commission and the "Evaluation Regulations for Organic Product Certification Catalogue" issued by the organic working group.

India

Thomas Jacob¹ and A.K. Yadav²

The Indian organic sector received a significant boost with the launch of the International Year of Millets 2023 (IYoM23), endorsed by the UN General Assembly at the initiative of the Government of India. The chosen theme, "Healthy Millets, Healthy People," underscores the nutritional importance of these "nutri-cereals", often referred to as "golden grains". Millets are predominantly cultivated organically and have a minimal water footprint. They are hailed as superfoods, rich in protein, antioxidants, and essential nutrients. Organic millets have the potential to emerge as a lucrative cash crop, offering nutritional benefits and serving as a viable solution for future global food security.

Policies

India has implemented several pivotal government programs to promote organic farming, including the National Programme for Organic Production (NPOP), Paramparagat Krishi Vikas Yojna (PKVY), and Mission Organic Value Chain Development for the North-eastern Regions (MOVCD). These programs complement various state-level initiatives aimed at fostering organic agriculture. Among organic farmers, the Participatory Guarantee System (PGS) is gaining popularity.

To address the challenge of ensuring the availability of high-quality organic inputs, a national-level initiative proposes the establishment of a network comprising 10,000 Bharatiya Prakritik Kheti (Indian Natural Farming) Bio-input Resource Centers (BRCs) under the National Mission on Natural Farming (NMNF).

Under a new policy, states will receive incentives to reduce their consumption of chemical fertilizers.³ Additionally, a forward-looking scheme has been designed to promote climate-resilient agriculture by establishing 500 new "waste to wealth" plants, encompassing 200 compressed biogas plants and 300 community or cluster-based plants.⁴ This initiative aligns with the goal of promoting organic fertilizers in India, contributing to sustainable and environmentally friendly agricultural practices.⁵

¹ Dr. Thomas Jacob, Advisor, PDS Organic Spices

² Dr. A.K. Yadav, Senior Consultant, National Horticulture Board (NHB), Government of India

³ PM-PRANAAM — Prime Minister (PM) Programme for Restoration, Awareness, Nourishment and Amelioration of Mother Earth

⁴ Government of India has formulated schemes/plans to make agriculture more resilient to climate change. GOBARdhan (Galvanizing Organic Bio-Agro Resources Dhan)

⁵ Down to Earth, February 2023: Union Budget 2023-24: India's farmers can take to organic agriculture with proper support. Available at <https://www.downtoearth.org.in/blog/agriculture/union-budget-2023-24-india-s-farmers-can-take-to-organic-agriculture-with-proper-support-87485>

Indonesia

Wahyudi David¹

By mid-2023, the Indonesia Organic Alliance successfully established a participatory guarantee system known as “PAMOR Indonesia”. This ground-breaking initiative has experienced remarkable growth, now comprising 18 PAMOR units, encompassing a network of more than 54 operators, and engaging a total of 747 farmers (consisting of 416 males and 331 females). These dedicated individuals collectively manage and cultivate over 101 hectares of organic farmland. Additionally, this endeavor has achieved notable success in influencing local governance, resulting in the implementation of ten legislative acts related to organic agriculture. Among these, one was enacted at the provincial level, while two others were implemented at the district levels.

In parallel, according to information from the National Food Agency, it is anticipated that the revision of the Indonesia Standard of Organic Agriculture² will be finalized by the close of 2023. This revised version will introduce critical updates to the standards governing organic seed production and commercialization, ensuring that they align with evolving agricultural practices and standards. Moreover, this revised set of standards will extend its recognition to include naturally-grown products and aquacultured products, which will be considered organic in accordance with the Indonesian Good Aquaculture Practices (IndoGAP). This holistic approach reflects Indonesia's commitment to advancing organic agriculture while ensuring its relevance in a changing agricultural landscape.

Iran

Reza Ardakani³

The Ministry of Agriculture, in collaboration with the Iran Organic Association (IOA), is actively engaged in policy development aimed at cultivating organic medicinal plants in vulnerable regions of the country. This endeavor is firmly grounded in both national and international organic standards. To ensure successful market expansion, it is imperative to conduct comprehensive market research and remain vigilant in staying current with evolving trends and regulations.

Specialized meetings, featuring the participation of organic product supply activists, scientists, students, nutritionists, and media representatives, receive strong support from both the Iran Chamber of Commerce and the IOA. Furthermore, the 30th International Exhibition of Agricultural Industries, Foodstuffs, and Machinery (Iran Agrofood 2023 fair), held in June 2023, provided an opportunity for organic producers to showcase their products through the establishment of an organic pavilion. The association also offers initiatives such as the "Healthy Life" specialized exhibition,

¹ Dr. Wahyudi David, Faculty Member of Food Science and Technology, University Bakrie, Indonesia

² Standard Nasional Indonesia (SNI) 6729-2016

³ Dr. M. Reza Ardakani, Professor, Agroecology and Organic Farming, Azad University, Karaj, Iran

webinars, and panel discussions, aimed at fostering a broader network of activists across various related sectors.

In addition to the presence of more than 60 organic chain shops spanning over 15 provinces in Iran, several well-established online retailers are actively working to enhance consumer access to organic products. The IOA has taken on the role of facilitating the verification process for organic producers and suppliers seeking to engage with these online platforms. Despite the remarkable growth of organic agriculture, it is important to acknowledge and address the challenges that persist.

The 13th Iranian Organic Festival took place in Tehran from December 13th to 21st, 2023, with the support of both the Iran Organic Association and IFOAM Iran.

Iraq

Jwad Enad Mahdi¹

Previously, Iraq had heavily relied on chemical fertilizers due to misguided government policies. During this period, there was a shift towards rapid and high-production chemical agriculture. However, this approach took a toll on soil health, leading the Ministry of Agriculture to explore organic farming alternatives.

Due to political disputes with Turkey and reduced water shares in the Tigris and Euphrates rivers, Iraqi farmers began incorporating composting practices to conserve irrigation water.

The Ministry of Agriculture in Iraq adopted an organic-focused approach, establishing projects in each governorate. Notably, the Najaf agriculture directorate developed a project that involved treating plant waste through composting, with the addition of specific biological stimulants. Open-air composting was chosen as it represents one of the most efficient biological processes for treating organic waste.

Efforts have been made to produce high-quality fertilizers on a larger scale using components of palm trees, including leaves, trunks, and roots, mixed with fresh farmyard manure as a nitrogen source. Private sector initiatives have also emerged, producing solid, liquid organic fertilizers, and biological fertilizers. These products have gained recognition in Iraqi markets, with the utilization of palm, wheat, and rice waste in organic fertilizer production. Innovative methods for preparing liquid fertilizer and extracting humic and fulvic acids are also being explored.

Over the past decade, organic fertilization has gained traction in Iraq as an environmentally friendly alternative nutrient source for plants. It offers benefits such as enhanced soil microorganism populations, reduced greenhouse gas emissions, and the restoration of soil fertility, which had deteriorated due to excessive use of chemical fertilizers.

Numerous modern farms in Iraq have adopted organic agriculture practices. For instance, approximately 1,000 hectares in the city of Balad in Salah al-Din Governorate

¹ Dr. Jwad Enad Mahdi, Director of the National Center for Organic Agriculture, Ministry of Agriculture, India

have embraced organic farming. Additionally, all orchard areas in the satellite city of Dujail, north of Baghdad, spanning 8,000 hectares, have transitioned to organic agriculture. Central Iraq, including Najaf and Babil Governorates, has witnessed the adoption of liquid organic fertilizers in wheat cultivation over 18'000 hectares.

In recent years, particularly in 2022 and 2023, organic agriculture has gained prominence in Iraq as farmers recognize its soil-preserving benefits. This has led to an increased interest among farmers in obtaining organic certification for their crops.

As of the end of 2023, the use of organic fertilizers by agricultural companies has seen significant growth, rising from 20 percent to 28 percent among Iraqi farmers. Furthermore, the number of companies marketing organic products has surged from 22 to 76 within the past two years, in 2022 and 2023. Some of these companies have also ventured into vermicompost production, with Baghdad Company and Al-Dujail Company obtaining licenses from the Iraqi government for these endeavors.

Japan

Yoko Taniguchi¹ and Miyoshi Satoko²

The organic food market in Japan maintained its growth trajectory throughout 2022, with a notable expansion to 224 billion yen (1.6 billion euros). This represents a remarkable 21.1 percent increase from the previous estimate conducted in 2017.³ Furthermore, a significant shift in consumer behaviour was observed, with 32.6 percent of consumers now purchasing organic foods at least once a week, a substantial rise from the 17.5 percent reported in the 2017 survey. Additional data from consumer panels⁴ indicated that sales of organic foods, excluding products without barcodes (JAN codes), grew by 8.4 percent in 2022.⁵ While the size of barcoded organic products experienced remarkable growth in 2020 (17.7 percent) and 2021 (19.0 percent), it moderated in 2022.

In conjunction with robust government policy support, the private sector has made significant strides in expanding the organic food market. In April 2023, retailers and organic food manufacturers collaborated to establish the Japan Organic Processed Foods Consortium. This consortium is dedicated to promoting organic processing utilizing domestically sourced ingredients.⁶

¹ Prof. Dr. Yoko Taniguchi. Associate Professor, Setsunan University, Japan

² Miyoshi Satoko, Executive member, Organic Congress Japan

³ Ministry of Agriculture, Forestry and Fisheries of Japan, "Yuki nogyo wo meguru jijo" (in Japanese) September 2023.

⁴ Data obtained by Yoko Taniguchi in the research project "Japan Organic Market Research" led by Ayako Kawai of Kagawa University and funded by FCDO of UK.

⁵ In 2022, large growth was seen in livestock products (359 percent), ice creams (309 percent), desert and yoghurt (110 percent), dairy products (72 percent), pickles and tsukudani (68 percent), spreads (66.9 percent), soft drinks (60 percent) and confectioneries (52 percent).

⁶ In June 2023, Aeon Co., Ltd, the leading supermarket chain in Japan, announced its intention to triple the sales of its private brand "Green Eye Organic" series. Another big supermarket chain, LIFE Corporation, opened its 9th "BIO-RAL" store, the company's new store format dedicated to organic and natural concept. (Japan Agricultural News, July 4, 2023)

In 2022, the enactment of the MeaDRI Law (Measures for Achievement of Decarbonization and Resilience with Innovation) marked a significant milestone, and it has now entered the implementation phase. By March 2023, all 47 prefectures had formulated their respective prefectural basic plans for MeaDRI implementation.

The Ministry of Agriculture, Forestry, and Fisheries (MAFF) has actively supported local governments in their efforts to promote organic agriculture within their regions through the "Organic Village" initiative. As of August 31st, 91 municipalities have earned recognition as "Organic Villages," a substantial increase from the 55 recognized in 2022.¹ This progress puts the achievement of the 100th Organic Village by 2025 ahead of schedule and paves the way for the creation of the 200th Organic Village by 2030. Within this framework, local governments establish "Organic Agriculture Implementation Plans" to expand organic production and provide support for the distribution, processing, and consumption of organic food. The public sector has also started to acknowledge the importance and benefits of public procurement, leading to the introduction of organic food in public kitchens.²

The organic school meals movement is rapidly gaining momentum. On June 15th, a group of 30 National Diet (Parliament) members launched a cross-party parliamentary league dedicated to supporting organic school meals. The goal of this group is to promote organic school lunches in elementary and junior high schools nationwide while simultaneously expanding organic farming across Japan, providing food that is beneficial to the health of children.³

Kazakhstan

*Raushan Zhazykbayeva*⁴

Kazakhstan's organic sector has experienced consistent growth since the early 2000s, when the first national producers began exporting their products to EU countries. This growth gained substantial momentum following the enactment of the Organic Production Law in 2015. In 2017, a series of standards and regulations, including the national standard for organic production, were adopted. Currently, the law is undergoing a revision process.

Organic production in Kazakhstan remains predominantly export-oriented, with a primary focus on the European Union. Key organic exports comprise wheat, flax seeds, oilseeds, and soybeans. Additionally, other products destined for export include peas, buckwheat, wheatgrass, flax, chickpeas, oats, millet, spring wheat, camelina, Sudan

¹ Ministry of Agriculture, Forestry and Fisheries of Japan, https://www.maff.go.jp/j/kanbo/kankyo/seisaku/midori/midorihou_kihonkeikaku.html

² Afu Syokudo, available at <https://afu-shokudo.studio.site/>

³ The Japan Agricultural News, June 15, 2023: Bipartisan Congressional Caucus to Expand Organic School Lunches Nationwide, available at <https://www.jacom.or.jp/nousei/news/2023/06/230615-67361.php>

⁴ Raushan Zhazykbayeva, International legal expert, Kazakhstan

grass, lentils, sainfoin, and spring barley.¹ These organic products are meticulously produced and processed in strict accordance with the quality standards demanded by export markets. Inspections and certification processes are conducted by foreign certification bodies (CB) accredited in the respective export market countries.

While the domestic organic market is still in its nascent stage, significant potential exists for its growth and development. Kazakhstan boasts expansive cropping areas, vast pastures, and favorable climatic conditions. As an upper-middle-income country with a per capita GDP of 11'476.6 USD², the nation is well-positioned to tap into this potential. Anticipated growth in internal demand for organic products is primarily expected in the larger urban centers.

Kingdom of Saudi Arabia

Department of Organic Production³

The Kingdom of Saudi Arabia's government, represented by the Ministry of Environment, Water, and Agriculture, is deeply committed to nurturing and advancing organic agriculture. It actively provides the necessary resources and support to ensure the sustainability of this vital sector. Furthermore, there is a concerted effort to raise awareness within the local community about the significance of adopting organic agricultural practices. These efforts promote environmental preservation and safeguarding natural resources and address critical aspects of food safety and consumer well-being.

A comprehensive system has been established to achieve these objectives, encompassing legal, supervisory, technical, and logistical components. This system includes key entities such as the Organic Production Department (ODP), the Saudi Organic Farming Association (SOFA), and the National Center of Organic Agriculture (NCOA). Within the Ministry, the ODP serves as the authoritative body responsible for legislative and technical matters, overseeing and supervising the organic sector and formulating plans and policies for organic agricultural development. Additionally, it directly supervises control and certification activities, ensuring that certification bodies licensed by the Ministry uphold the highest standards. This diligent oversight protects consumers from deceptive business practices while instilling greater confidence in locally sourced organic foods.

The SOFA also plays a pivotal role in advancing organic agriculture throughout the Kingdom. It collaborates with the Ministry to conduct awareness initiatives and extend vital services to the community. Furthermore, it serves as an overarching organization

¹ Kazakhstan National Accreditation Center's data in 2021;
<http://www.nca.kz/info/articles/media/organicheskiy-rynok-kazahstana-perspektivy-i-vozmozhnosti/>

² The World Bank (2023): The World Bank in Kazakhstan
<https://www.worldbank.org/en/country/kazakhstan/overview>

³ Department of Organic Production, Ministry of Environment water and Agriculture, Kingdom of Saudi Arabia

for organic farmers and producers, offering essential support in various logistical areas, including marketing assistance and post-harvest practices.

As a result of these collective efforts, the organic sector has witnessed significant growth and development. In 2022, the organic agricultural land expanded to 23'315 hectares, reflecting a remarkable 37 percent increase compared to 2017. Moreover, total organic production surpassed 95'298 thousand metric tons in 2022, signifying an impressive 80 percent growth compared to 2017. Among the noteworthy organic crops are olives, dates, and cereals.

Kyrgyzstan

Tinatin Doolotkeldieva¹ and Asan Alymkulov²

In 2022, the Kyrgyz Republic enacted an updated organic production law that aligns with international standards. Unlike the previous law, which exclusively pertained to organic agricultural practices, the new version extends its scope to encompass various aspects of the organic industry, such as transportation, storage, marketing, packaging, and labeling. Additionally, a Participatory Guarantee System (PGS) has been included as an alternative quality assurance system. This document was officially endorsed by the President of the Kyrgyz Republic.

A national program geared towards fostering organic production in the Kyrgyz Republic until 2027 is in its finalization stages. A comprehensive road map has been drafted to guide the realization of the ambitious "Five Years of Action for the Development of Mountain Regions" initiative from 2023 to 2027. In September 2023, a significant gathering took place with the participation of the Coordination Council of Development Institutes under the Parliament of the Kyrgyz Republic to discuss and strategize the development of a range of environmentally friendly projects, collectively known as "Green projects", which included the expansion and replication of the Organic Aymak (OA) model, the promotion of vermicompost production and utilization, and the adoption of efficient drip irrigation systems.

Mongolia

Davaa Tungalag³

In 2016, the Government of Mongolia successfully passed and implemented the Organic Food Law. Currently, there is an ongoing parliamentary review to expand the scope of this law to encompass not only food products but also non-food items, such as fibers.

¹ Tinatin Doolotkeldieva, Kyrgyz-Turkish Manas University, Plant Protection Department, Bishkek city, Kyrgyzstan, 720044

² Asan Alymkulov, Program Development Manager, BIO-KG Federation of Organic Development

³ Davaa Tungalag, Senior Analyst, Department of Coordination for Food Production Policy Implementation, Ministry of Food Agriculture and Light industry

In Mongolia, 23 Participatory Guarantee Systems (PGS) and two third-party certification bodies are responsible for conducting conformity assessments of organic food products. The Ministry of Food, Agriculture, and Light Industry maintains an online Organic Food Registry and Database¹ to track the certification status of organic products efficiently.

As of December 2022, Mongolia boasted over 180 producers actively engaged in organic farming, covering a combined area of 932.5 hectares. These dedicated producers supplied the market with 170 tons of vegetables and 8 tons of animal products. However, this constitutes less than 1 percent of the national food and agricultural production. Mongolia has set a target to achieve a 5 percent share of all agricultural products under organic certification by the year 2030.

The International Organic Accreditation Service has conducted initial accreditations for two certification bodies in Mongolia, with results expected to be announced by November 2023. Furthermore, the Ministry has undertaken a comparative assessment of the equivalency between Chinese and Mongolian organic regulations. This effort has led to proposals for specific regulatory changes aimed at enhancing international compliance, particularly with China, which serves as Mongolia's primary trade partner. One notable success story in Mongolia's organic sector is the recognition garnered by MonPellets LLC for their organic sheep wool fertilizer. This innovative product, derived from sheep shearing by-products, has gained significant recognition within the international fertilizer market. As a testament to its success, MonPellets LLC exported 60 metric tons of this organic sheep wool fertilizer to both Germany and the USA.

Pakistan

Noshin Ilyas² and Zuhair Hasnain³

Pakistan is committed to fostering organic agriculture through a multifaceted approach that includes the promotion of resource conservation technologies, the utilization of biocontrol for crop production and protection, the implementation of organic regulations, and the establishment of certification procedures and specialized accreditation laboratories for testing and certifying organic products.

At the governmental level, Pakistan is actively encouraging initiatives aimed at bolstering organic farming practices and sustainable land resource management across the nation. The Pakistan Agricultural Research Council (PARC), in collaboration with the National Agricultural Research Centre and the Ministry of National Food Security and Research, is at the forefront of promoting organic agriculture. Additionally, the Centre for Agriculture and Bioscience International (CABI) is diligently crafting the initial draft of an organic agriculture policy. CABI is also actively engaged in capacity-

¹ www.organic.gov.mn

² Dr. Noshin Ilyas, Associate Professor, Department of Botany, Faculty of Sciences, PMAS Arid Agriculture University Rawalpindi, Pakistan

³ Dr. Zuhair Hasnain, Assistant Professor, Department of Agronomy, Faculty of Crop and Food Sciences, PMAS Arid Agriculture, University Rawalpindi Pakistan

building efforts through the organization of workshops and the implementation of a landscape initiative in the Barkhan and Lasbela districts of Balochistan.

Furthermore, several non-governmental organizations (NGOs) and private entities are contributing significantly to the promotion of organic agriculture in Pakistan. They are playing a pivotal role in supporting the organic community by establishing comprehensive supply chains, advocating for policy interventions, and providing essential training. While organic agriculture is gaining ground in localized areas, notably in northern Punjab, Khyber Pakhtunkhwa, Eastern Balochistan, Azad Kashmir, Sindh, and Gilgit Baltistan, there remains a pressing need for intensified efforts to expand organic practices nationwide, encompassing multiple crops and regions.

Philippines

Bernadette F. San Juan¹

The Bureau of Agriculture and Fisheries Standards (BAFS) maintains a website that lists organic farms in the Philippines certified according to the National Organic Agriculture Program NOAP.² As of September 2023, the total organic area certified according to this programme was 1,074 hectares. However, data suggests that many organic farms have not renewed their one-year certifications due to the complex and expensive third-party certification process. This situation led to the introduction of the Participatory Guarantee System (PGS) as an alternative certification method.

Since the introduction of PGS in the Philippines, twelve PGS groups have received accreditation. The Tublay Organic Farming Practitioners Agriculture Cooperative (TOFPA-COOP) was the first PGS group to be accredited. Each major island group in the Philippines, including Luzon, Visayas, and Mindanao, now has accredited PGS certifying bodies (PGS-OCBs). Region VIII (Eastern Visayas) has the most PGS-OCBs and the largest PGS-certified organic farm area.

In 2022, 42.8 hectares of agricultural land transitioned to certified organic farms during the first year of PGS implementation. By September 18, 2023, an additional 99.2 hectares were added to the certified organic farm area in less than one year. BAFS aims to certify and accredit forty-seven core PGS groups nationwide by 2024.

To institutionalize organic agriculture at the local level, the National Organic Agriculture Board (NOAB) collaborates with local government units (LGUs) to implement organic agriculture within their jurisdictions. They provide assistance in creating local ordinances that establish the practice of organic agriculture at the local level.

¹ Bernadette F. San Juan, Director of the National Organic Agriculture Program, The Philippines

² Please note that according to the FiBL survey on organic agriculture worldwide, in 2022, more than 200'000 hectares were reported by five international certifiers, which are not covered under the country's National Organic Programme.

South Korea

Manchul Jung¹ and Jennifer Chang²

Budget cuts affecting environmentally-friendly agriculture³ are becoming a reality, with an estimated reduction of 11 billion Korean won⁴ in the budget for the year 2024. Notably, the entire budget for the "Environment-friendly Food Package for Pregnant Women and New Mothers"⁵ was eliminated despite receiving high acclaim from the Korean public. Additionally, an increasing trend of government control is being imposed on public meals. For instance, the Seoul Metropolitan Government has introduced a policy for the integration of meal programs at day-care centers, which were previously under the autonomy of local districts in Seoul. This integration is justified under the pretext of "efficiency". These government actions are causing growing concern among the public, as they fear a slowdown in the consumption of organic food in the public sector and the erosion of the "values of urban-rural coexistence," which have been integral to the growth of the organic sector in South Korea.

Another development relates to the certification of environmentally-friendly agriculture, with certifications sometimes being cancelled due to "unintentional pesticide contamination". This contamination is often caused by external environmental factors rather than by farmers' deliberate use of pesticides. Partial amendments made in May 2023 now require mandatory re-testing by an eco-friendly certification body in cases of unintentional pesticide contamination. Additionally, there is a shift towards implementing corrective measures instead of outright certification cancellation when chemically synthesized pesticides are detected, provided they were not intentionally or negligently used by farmers. Furthermore, there is a proposal to amend the enforcement decree of the Act to lower the current pesticide residue limit of "non-detection" to less than 1/20 of the residue limit for general agricultural products. The focus is shifting towards improving farmers' practices during the production process itself rather than solely relying on the detection of chemical substances such as synthetic pesticides and chemical fertilizers.

Despite the challenges faced by the organic sector in 2023, farmers and consumers came together for the annual June 2 Organic Day Celebrations.⁶ These celebrations included a commemorative ceremony and a farmers' market held in downtown Seoul. Moreover, over eight thousand farmers engaged with the public during the "2023 National Organic Farmers' Day" in Haenam, South Cholla Province.

¹ Manchul Jung, Director, Korea Institute for Rural Affairs and Local Governance, Republic of Korea

² Jennifer Chang, Executive Director, IFOAM-Organics Asia, Republic of Korea

³ Organic agriculture is included under "environmentally-friendly agriculture" under the South Korean regulations.

⁴ 7.8 million euros (1 euro: 1,410 Korean won)

⁵ <https://www.fao.org/family-farming/detail/en/c/1631252/>

⁶ June 2 has the same phonetic sound as "organic" In Korean.

Sri Lanka

Achala Samaradiwakara¹

Sri Lanka has a rich agricultural history, but the heavy use of agrochemicals has resulted in farmers facing health issues, poverty, and even suicides. Returning to natural farming methods would benefit the soil and the environment.

As of 2022, the certified organic land has expanded to cover 68'072 hectares, making up 2.4 percent of the total cultivated land. This places Sri Lanka among the top ten countries in terms of certified organic land and the organic share of cultivated land. It is also a major organic exporter in Asia. However, there has been a recent decrease in certified organic land, likely due to factors like the rising cost of certification and currency devaluation.

To address this, social enterprises have launched an Organic Participatory Guarantee System (PGS) to provide organic food for the local market. Additionally, a group of like-minded organic enthusiasts has established a PGS Council, a commendable move to further bolster the organic farming sector in Sri Lanka.

Türkiye²

Özge Çiçekli³

The Regulation on Agricultural Production Planning became effective on September 14, 2023. It emphasizes organic agriculture in crop production planning and provides subsidies in the form of area-based support to organic farmers. Low-interest agricultural loans and assistance for eco-friendly farming methods and cultural practices are also available, although the amounts are relatively small.

Most organic exports, excluding honey, consist of plant-based raw materials and processed products with high market adaptability. Textiles, dried fruits, nuts, grains, legumes, cotton, medicinal and aromatic plants, as well as processed food items like flour, fruit juice, tomato paste, and frozen fruits, make up the majority of foreign trade. While the European Union (EU) and the United States are primary markets, some animal products are also sold in limited quantities to other regions, such as the Gulf countries. As per the Organic Integrity Database⁴, there are 936 certified operators in Turkey with NOP certificates, including 146 operations involved in organic cotton production.

In the domestic market, there is strong demand for fresh fruits, vegetables, meat, dairy products, eggs, and processed foods like bread, flour, pasta, and baby food.

¹ Achala Samaradiwakara, Co-Founder and Managing Director, Good Market Sri Lanka

² Please note that in this report, we have allocated Türkiye to Europe, as it is a candidate country for the European Union

³ Özge Çiçekli, General Secretary, Association of Ecological Agriculture Association, Türkiye

⁴ <https://organic.ams.usda.gov/integrity>

Vietnam

Dang Thi Bich Huong¹

In the first half of 2023, Vietnam's organic production and market have seen significant growth following the government's implementation of the Vietnam Organic Development Program (2020-2030). By the end of 2030, Vietnam's organic production area is expected to reach 2.5 percent of the total agricultural area, compared to just 0.6 percent in 2021.

While no official statistics are available on organic data, the organic agricultural production area, according to national standards (TCVN 11041), is steadily increasing. All provinces have their own organic development programs with support for key organic production activities, including free certification and training.

However, there are challenges in the organic sector, including the lack of data, limited training opportunities in organic agriculture, non-standardized input materials for organic production according to national regulations, and the high cost of imported inputs, which results in higher organic product prices. This, in turn, affects consumption and the market, especially in the face of global economic difficulties and reduced household spending. Additionally, there are no regulations for foreign certification bodies and internationally certified organic producers in Vietnam, further complicating the consumption and market dynamics. Key challenges are ensuring transparency in the Vietnamese organic market and maintaining consumer confidence in local organic products.

To address these issues, the Vietnam Organic Agriculture Association is collaborating with Naturland² to provide organic practice training programs until 2025. These programs aim to enhance the quality of training and guidance in organic agriculture in Vietnam.

IFOAM - Organics Asia in 2023

The 6th Organic Asia Congress took place in Kauswagan, Philippines, with the theme "Building World Peace through Organic Agriculture - Food Security Vital to Peace Building." It brought together over three thousand participants from 24 countries and regions. The theme highlighted Kauswagan's successful journey from conflict to peace and hunger alleviation by embracing organic agriculture.

The ALGOA Presidency was transferred from Goesan County, South Korea, to the League of Organic Agriculture Municipalities, Cities & Provinces (LOAMCP) in the Philippines during the event. Additionally, the Young Elected Officers Network was formed under ALGOA, aiming to unite elected officials under 40 to develop policies and projects promoting organic agriculture in the region.

¹ Dang Thi Bich Huong - Vice president and General Secretary of the Vietnam Organic Agriculture Association (VOAA), Hanoi, Vietnam

² German-based association promoting environmental protection and natural resource conservation through organic farming practices

Another significant outcome was the creation of the Education and Research Network for Organic Agriculture Development (E-ROAD). Its goal is to establish a platform for collaboration with higher learning institutions like universities and colleges to implement organic agriculture curricula and coordinate research in Asia.

Addressing desertification concerns, the 1st International Conference on Organic Agriculture in the Drylands and Deserts was co-organized with China Shengmu Organic Milk Ltd in Bayan Nur City, Inner Mongolia, China. Speakers from ten countries shared best practices in organic agriculture development, leading to the formation of the "Drylands and Deserts Organic Agriculture Network (DOAN)."

The 2nd World Organic Youth Summit, co-organized with Hualien County, Taiwan, welcomed over sixty youth delegates from twenty-four countries and regions worldwide and four hundred local participants. Under the theme "Opportunities for Youth in the Organic Sector," the Summit facilitated discussions on current issues and prospects in the organic industry.

Looking ahead to 2024, IFOAM - Organics Asia plans to introduce a global organic award and co-organize an international conference on school meals and public procurement, as well as the World PGS Conference in conjunction with the 20th anniversary of the IFOAM PGS launch. Additionally, they will collaborate with members to organize pre-conferences and side events for the 21st IFOAM Organic World Congress in Taiwan.

Organic Agriculture in Asia: Key Facts and Figures

JAN TRÁVNÍČEK,¹ BERNHARD SCHLATTER² AND HELGA WILLER³

More than 8.8 million hectares of farmland were organic in Asia in 2022 – India had the largest area

In Asia, more than 8.8 million hectares were managed organically in 2022. Nine percent of the world's organic farmland was in Asia.

With more than 4'726'000 hectares, India had the largest farmland area under organic management, followed by China (nearly 2'900'000 hectares), Thailand (over 241'000 hectares) and Philippines (almost 229'000 hectares). More than 91 percent of Asia's organic farmland was in these four countries.

Timor-Leste is the country with the highest organic area share in Asia

Organic farmland in Asia constituted 0.5 percent of the total agricultural land of the continent and was thus below the global organic area share of 2.0 percent in 2022.

The country with the highest organic area share was Timor-Leste (8.5 percent), followed by India (2.6 percent) and Sri Lanka (2.4 percent).

Asian organic farmland increased by more than 2.3 million hectares

Organic land in Asia increased by more than 2.3 million hectares from 2021 to 2022, which represents a 35.9 percent increase. Over the decade from 2013 to 2022, organic farmland grew by 161 percent, significantly outpacing the global growth rate of organic farmland.

Key crops grown: cereals, textile crops and oilseeds

Nearly forty percent of the organic farmland in Asia is for arable crops (3'498'356 hectares). Among the key crops are cereals, mostly wheat and rice, (1'807'067 hectares) and textile crops (634'054 hectares), mainly in India, furthermore oilseeds (611'075 hectares), mainly in China.

Permanent crops accounted for approximately 12 percent of total organic land in Asia in 2022. Among the key crops were coconuts (250'263 hectares), mainly in the Philippines, and tea and mate (217'750 hectares) and nuts (152'265 hectares), mainly in China.

Organic producers, processors and importers: India leads with almost 2.5 million producers

There were nearly 2'729'000 organic producers in Asia. Most of the farmers were in India, which is the country with the largest number of farmers worldwide (almost

¹ Jan Trávníček, Czech Organics, Staré Město, Czech Republic, www.czechorganics.com

² Bernhard Schlatter, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

³ Helga Willer, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

2'481'000). More than sixty percent of the world's organic producers were in Asia. Compared to 2021, nearly 947'000 more organic producers were counted (+53.1 percent), mainly due to the increase of producers reported from India (+946'553). A total of 940 exporters and 12'969 processors were reported.

Retail sales: Insufficient information on the organic food market in Asia

Organic retail sales numbers for Asia are not sufficient. Only 10 countries with organic farmland provided organic retail sales figures. Of these countries, only China, Japan, Saudi Arabia and South Korea provided an update for 2022. Total organic retail sales reported in 2022 reached more than 15.0 billion euros. This does not, however, mean that there is no domestic market for organic products in the other Asian countries. Many countries have developed local markets.

Organic exports

While data on the domestic market are not sufficient, data on organic export volumes (metric tons) to the European Union, which is the major export market for Asia, has been available since 2018. Export data to the US has been available even for longer (since 2014) but are less significant (16.5 percent of all exports to the EU and US in 2022) and do not cover all exported products.

Data show that in 2022 almost 614'384 metric tons of products were exported from Asia to the EU and US, constituting 12.5 percent of all organic imports to these countries/trade blocks. Since 2018, there has been a continuous annual decrease, amounting to a total reduction of 32.9 percent or 330'158 metric tons.

China is the largest exporter

The largest Asian exporter to the US and EU was China (more than 199'000 metric tons of products, mainly oil cakes, rice, and sugar, followed by India (almost 176'000 MT, mainly oil cakes and rice) and Pakistan (over 51'000 MT, mainly rice).

Oil-cakes are the most important export products

Comprising more than 195'895 metric tons and nearly 32 percent of Asian organic exports, oil cakes were the most important product group (mostly soy oil-cakes: over 195'738 metric tons), followed by rice (108'815 MT) and sugar (32'339 MT).

For detailed data on organic agriculture in Asia, please refer to the tables provided in the Annex, section 2.2 Organic Agriculture in Asia: Tables, page 313.

Organic Agriculture in Asia: Graphs

Asia: The ten countries with the largest organic agricultural area 2022

Source: FiBL survey 2024

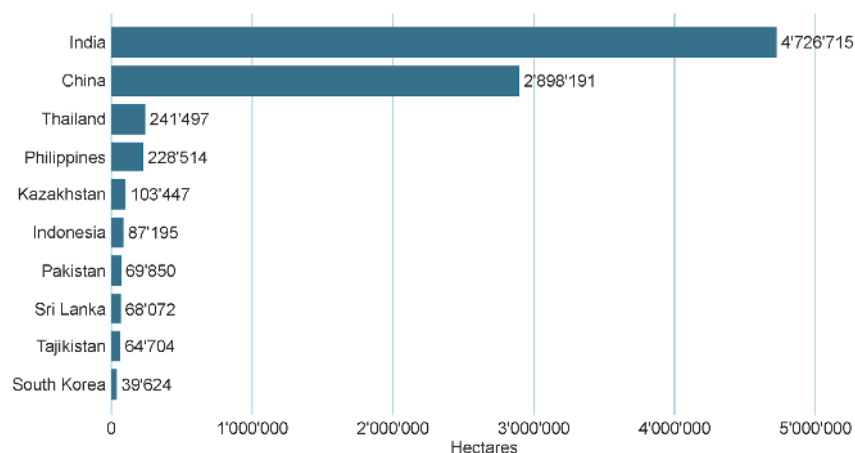


Figure 60: Asia: The ten countries with the largest organic agricultural area 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Asia: The ten countries with the highest organic share of total agricultural land 2022

Source: FiBL survey 2024

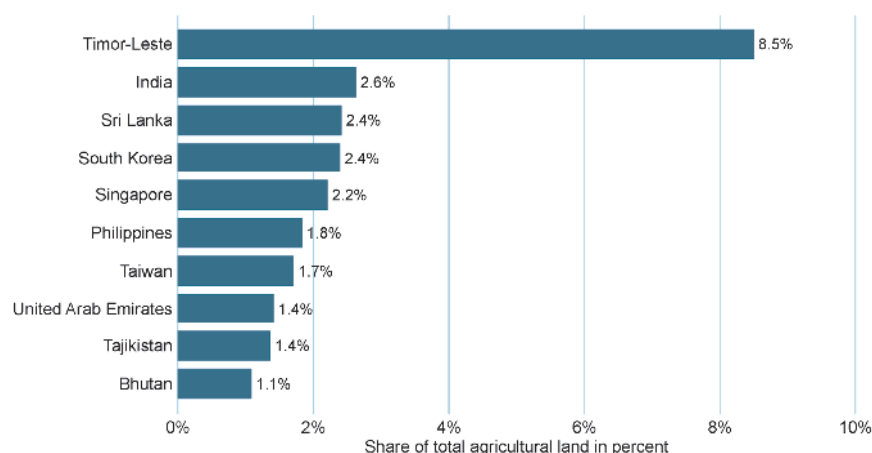


Figure 61: Asia: The countries with the highest organic share of total farmland 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Asia: Development of organic agricultural land
2000 - 2022

Source: FiBL-IFOAM-SOEL surveys 2001-2024

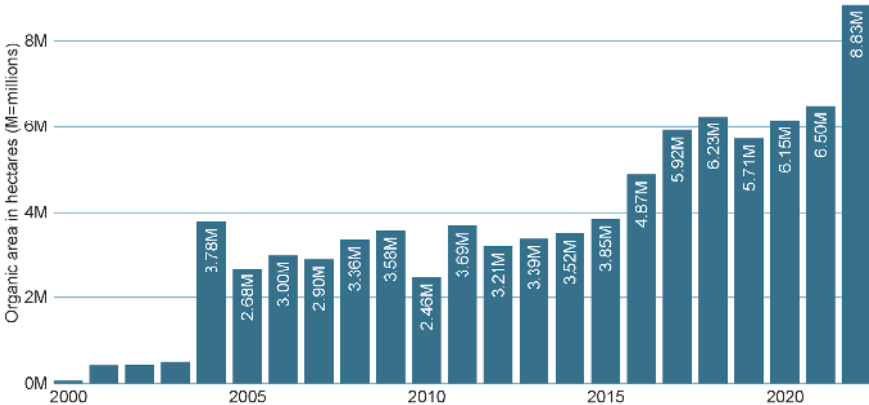


Figure 62: Asia: Development of organic agricultural land 2000-2022

Source: FiBL-IFOAM-SOEL-surveys 2001-2024

Asia: Use of organic
agricultural land 2022

Source: FiBL survey 2024

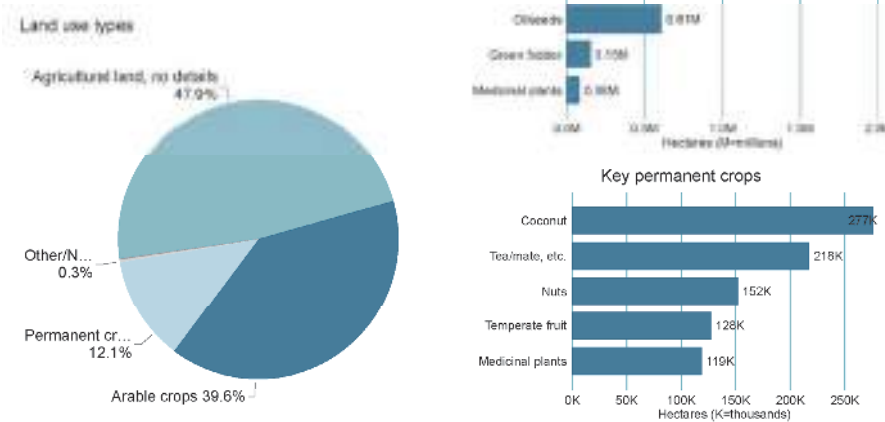


Figure 63: Asia: Use of organic agricultural land 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments.

Asia: Key EU and US export countries in 2022

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

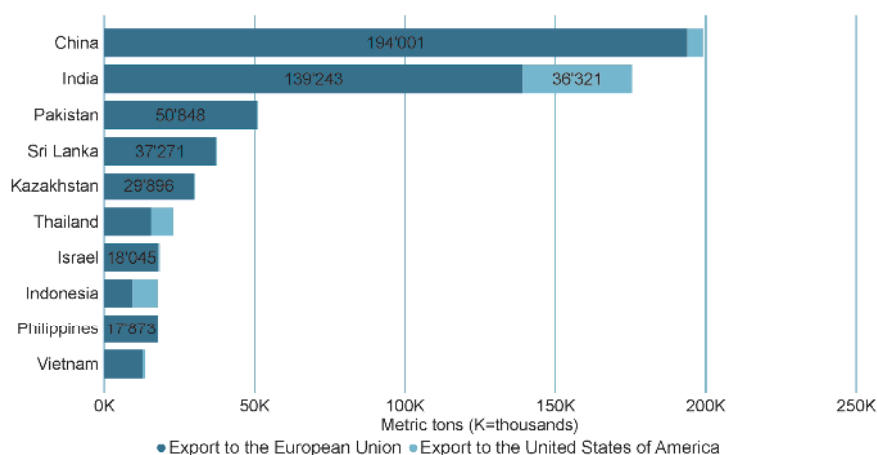


Figure 64: Asia: Key countries exporting to the EU and US (export volume in MT)

Source: GATS/USDA 2024 and TRACES/European Commission 2024

Asia: Key commodity groups exported to the EU and US in 2022

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

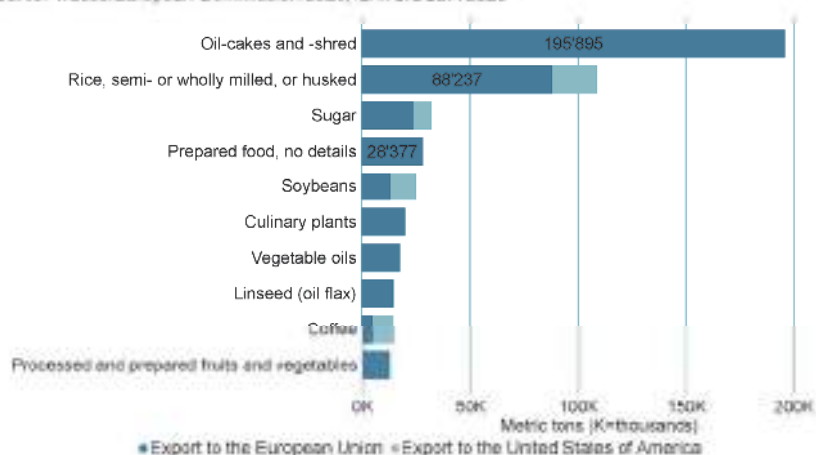


Figure 65: Asia: Key commodity groups exported to the EU and US (export volume in MT)

Source: GATS/USDA and TRACES/European Commission 2024

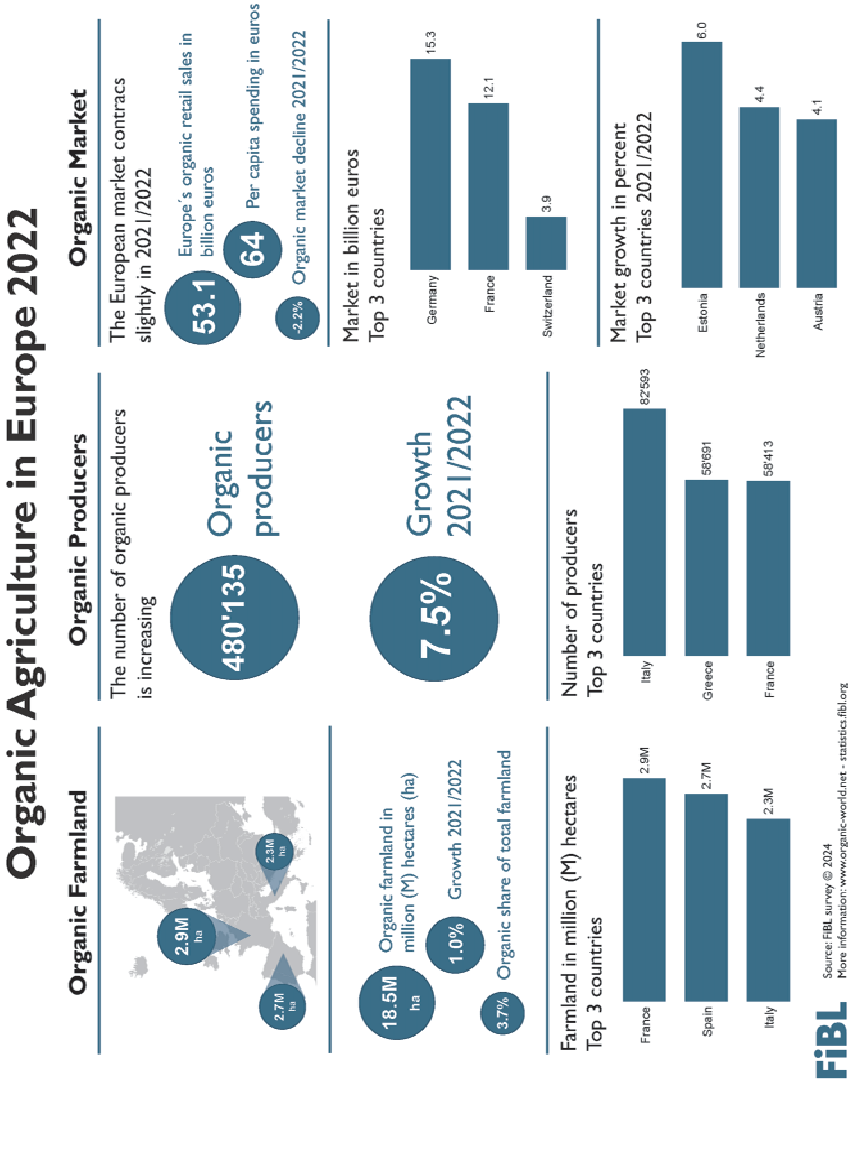
Europe



Map 4: Organic agricultural land in the countries of Europe 2022

Source: FiBL survey 2024 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 335.

Infographic Organic Agriculture in Europe



Infographic 6: Organic Agriculture in Europe 2022
Source FiBL survey 2024

Organic in Europe: Recent Developments

HELENE SCHMUTZLER,¹ MARIA GERNERT,² MARIA ZINTL,³ OHEMAA AGBOLOSOO-MENSAH,⁴ LAURA SAUQUES,⁵ HANNA WINKLER,⁶ LEA BAUER⁷ AND SILVIA SCHMIDT⁸

New EU regulation enters into application

In June 2018, the European Union introduced Regulation 2018/848⁹, focusing on the production and labelling of organic products. Initially slated to take effect on January 1, 2021, its implementation was postponed by one year, shifting the start date to January 1, 2022¹⁰. The legislation adopted in 2018, referred to as the "Basic Act," laid the foundation. Subsequent legislation, including both delegated and implementing regulations, commenced development in June 2018 and continued to evolve until 2023. In this year, seven additional regulatory acts were published, including the adoption of specific labelling requirements for organic pet food¹¹.

As of the time of writing, the complete set of regulations consists of the basic regulation (EU) 2018/848, which has been amended or supplemented by 21 delegated regulations, 11 implementing regulations and a regulation pertaining to the rules governing pet food labelling (see chapter on Regulations in this volume on page 112).

In 2023, two of the secondary regulatory acts underwent regular amendments. Specifically, the implementing regulation (EU) 2021/1165¹², containing the lists of authorized products and substances for use in organic production and the

¹ Helene Schmutzler, IFOAM Organics Europe, Brussels, Belgium, www.organicseurope.bio

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⁷ Lea Bauer, IFOAM Organics Europe, Brussels, Belgium

⁸ Silvia Schmidt, IFOAM Organics Europe, Brussels, Belgium

⁹ 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>

¹⁰ 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>

¹¹ Regulation (EU) 2023/2419 of 18 October 2023 on the labelling of organic pet food (OJ L, 2023/2419, 27.10.2023) <https://eur-lex.europa.eu/eli/reg/2023/2419/oj>

¹² Commission Implementing Regulation (EU) 2021/1165 of 15 July 2021 authorising certain products and substances for use in organic production and establishing their lists https://eur-lex.europa.eu/eli/reg_impl/2021/1165/oj

implementing regulation (EU) 2021/2325¹, which establishes the lists of third countries and third country control bodies recognized on the basis of equivalence under the relevant Article of the previous organic regulation, were both subject to two amendments each within the course of the year.

Additional technical details regarding controls have been refined. A standardized format for reporting official investigations conducted by Member States to elucidate instances of contamination involving products or substances unauthorized for use in organic production has been developed. Furthermore, adjustments were made to the Model of Certificate established by the basic regulation. These changes were implemented to align with recent technological advancements that enable control bodies and authorities within the EU to issue certificates through the EU-wide TRACES system, utilising a qualified electronic seal as a digital signature.²

Within the framework of EU organic regulations, international trade stands as one of the three key focal points. Specifically, the recognition of control bodies and control authorities operating in third countries, authorizing them to conduct organic inspections in accordance with the new compliance regime, represents a critical aspect. This regime entails the direct application of EU requirements in third countries for the production and control of organic products intended for import into the EU market, rather than relying on equivalency.³

The new system of international trade and imports

The process of renegotiating most of the existing equivalency agreements with third countries is underway and expected to continue until 2026. Notably, trade agreements have already been established with Chile and Switzerland, and mutual agreement has been reached with the United Kingdom in December 2023, ensuring the continuity of the existing agreement. Consequently, renegotiation is unnecessary with these three countries.

Negotiation talks are now underway with other third countries that currently hold organic equivalency agreements with the EU, such as Argentina, Australia, Canada, Costa Rica, India, Israel, Japan, New Zealand, South Korea, Tunisia, and the United States. In addition, negotiations have been initiated with Mexico and Colombia. Importantly, control bodies recognized for equivalency will need to transition to

¹ Commission Implementing Regulation (EU) 2021/2325 of 16 December 2021 establishing, pursuant to Regulation (EU) 2018/848 of the European Parliament and of the Council, the list of third countries and the list of control authorities and control bodies that have been recognised under Article 33(2) and (3) of Council Regulation (EC) No 834/2007 for the purpose of importing organic products into the Union https://eur-lex.europa.eu/eli/reg_impl/2021/2325/oj

² Commission Delegated Regulation (EU) 2023/207 of 24 November 2022 amending Regulation (EU) 2018/848 of the European Parliament and of the Council as regards the model of the certificate attesting compliance with the rules on organic production https://eur-lex.europa.eu/eli/reg_del/2023/207/oj

³ Commission Delegated Regulation (EU) 2023/1686 of 30 June 2023 amending Delegated Regulation (EU) 2021/1698 as regards certain procedural requirements for the recognition of control authorities and control bodies that are competent to carry out controls on operators and groups of operators certified organic and on organic products in third countries and certain requirements on their supervision https://eur-lex.europa.eu/eli/reg_del/2023/1686/oj

compliance recognition by 2025. This transition means that the new EU organic regulation requirements will apply to third countries from that point onward, accompanied by the implementation of new import rules at EU borders.

Common Agricultural Policy (CAP)

The current CAP

The current Common Agricultural Policy (CAP) regulations were officially adopted by the European Parliament in a plenary session on November 23, 2021, following the approval of delegated and implemented acts. By December 31, 2021, the majority of Member States had submitted their draft national CAP Strategic Plans (SPs). In response, the European Commission issued what is referred to as "The CAP 2023-2027 Regulations." These regulations and SPs came into effect from January 1, 2023, and will remain in force until December 31, 2027. The updated CAP introduces greater flexibility for Member States in implementing its policy objectives.

The CAP plays a pivotal role in facilitating the transition to large-scale organic farming within the EU. However, its effectiveness in this regard depends on its ability to offer robust support to organic farmers and acknowledge their additional efforts and investments. Nevertheless, the new architecture of the CAP appears somewhat inadequate in addressing the pressing environmental challenges faced by societies. This architecture primarily relies on "eco-schemes," which constitute 25% of the budget allocated to the first pillar. Although eco-schemes could have been a valuable opportunity to incentivize environmentally friendly farming practices, they are mandatory only for Member States, while remaining voluntary for individual farmers. Furthermore, the definitions and criteria for eco-schemes have been delegated to Member States, resulting in varying levels of ambition and substantial disparities across different Member States.

Another important component of the CAP's green framework is the introduction of the conditionality for direct payments, which consists of nine "good agricultural and environmental conditions" (GAECs). Regarding the second pillar, 35% of the budget is allocated to agri-environmental and climate measures (AECMs).

European Green Deal and the CAP

The European Commission took significant steps toward achieving sustainable food systems by 2030 with the introduction of the European Green Deal in 2019 and the publication of the EU Farm to Fork and Biodiversity Strategies in May 2020.¹ These

¹ European Commission (2020): A Farm to Fork Strategy for a fair, healthy and environmentally-friendly food system. European Commission, Brussels. Available at https://eur-lex.europa.eu/resource.html?uri=cellar:ea0f9f73-9ab2-11ea-9d2d-01aa75ed71a1.0001.02/DOC_1&format=PDF

European Commission (2021): Communication from the commission to the European Parliament, the council, the European Economic and Social Committee and the committee of the regions on an action plan for the development of organic production. European Commission, Brussels. Available at EUR-Lex - 52021DC0141R(01) - EN - EUR-Lex (europa.eu)

strategies outlined clear objectives for this transition. The Implementing Regulation (EU) 2021/2289 mandates that Member States must "provide an explanation of the national contribution to achieving the Union's targets for 2030" as outlined in the Farm to Fork and Biodiversity Strategies. This requirement allows the European Commission to assess the alignment and impact of proposed CAP Strategic Plans, as well as the Union's environmental and climate legislation and commitments.

However, a briefing by IFOAM Organics Europe in 2022 on the status of CAP National Strategic Plans revealed that the level of ambition for developing and supporting organic farming falls short in many Member States. Without substantial changes in measures and budgets during potential annual revisions of the CAP Strategic Plans, it is unlikely that these plans will enable the attainment of the overarching goal of having 25% organic land in Europe by 2030. The first year of implementation appears to confirm this trend, as organic farmers have noted a decline in the comparative advantage for transitioning conventional farms to organic farming. In contrast, incentives for adopting less transformative farming practices with fewer environmental benefits seem to be more favourable.

Sustainable food systems legislation & green claims

The future of the legislative framework for sustainable food systems

The European Commission had originally planned to unveil its proposal for a legislative framework for sustainable food systems, often referred to as the "SFS law", by the end of 2023, as outlined in the Farm to Fork Strategy. This legislative initiative, considered one of the flagship measures of the Farm to Fork Strategy, was designed to provide a concrete definition of a "sustainable food system." Additionally, it was intended to incorporate provisions pertaining to sustainable public procurement and sustainability labelling.

The SFS law was seen as a key driver for the transition to sustainable food systems by increasing the demand for sustainable food products and integrating sustainability in all food-related policies, tackling the demand side and the middle of the chain actors.

The European Commission has not released this proposed legislation as scheduled, and there is currently no confirmed publication date available.

The Directive on substantiating green claims and its impact on the agri-food sector

In March 2023, the Commission took a significant step by proposing a Directive aimed at combatting greenwashing through the substantiation of green claims. The European organic movement strongly aligns with this objective. However, there are notable concerns regarding the directive's reliance on the Product Environmental Footprint (PEF) methodology, a tool developed by the Directorate-General for the Environment (DG ENV) over a decade. While the Directive acknowledges some limitations of PEF, particularly in its applicability to agri-food products, it paradoxically promotes its use in assessing the environmental impact of products. The key issue here is that the PEF methodology, rooted in life-cycle assessment (LCA), is ill-suited for comprehensively evaluating the environmental impact within complex agri-food systems. It falls short in

accounting for critical factors such as the impact of pesticides, effects on biodiversity and animal welfare, consequently tilting the scales in favour of products from intensive production systems.

The implications of this Directive on the agri-food sector are multifaceted. While organic products conforming to Regulation 2018/848 remain outside its scope, its influence extends well beyond the organic domain. On the positive side, the Directive introduces a stringent process for verifying environmental claims before they can be made on the European market. This move aims to curb the proliferation of unverified and questionable environmental claims. Furthermore, the Directive seeks to regulate environmental labelling schemes, curbing their rampant expansion and endorsing only the most credible ones.

The organic movement supports the Directive's overarching objective. Nevertheless, it underscores that the PEF methodology is an inappropriate tool for evaluating the environmental impact of agri-food products, which also includes items like cosmetics and textiles.

The upcoming discussions on this Directive in both the Parliament and the Council during the first quarter of 2024, with an adoption planned for the first half of the year, precede parliamentary elections. These deliberations represent a crucial juncture in the ongoing efforts to combat greenwashing and promote transparent environmental claims in the European market.

Climate legislation in the agricultural sector

The increasing impacts of climate change, including droughts and floods, are adversely affecting agricultural production, while greenhouse gas (GHG) emissions from agriculture have not decreased in the past decade. Simultaneously, cropland and grassland in the EU continue to emit GHGs rather than acting as carbon sinks. In response to these pressing challenges, the EU is intensifying its efforts to reverse this alarming trend. This entails revising the Land Use, Land Use Change and Forestry (LULUCF) Regulation (EU 2018/841) and the Effort Sharing Regulation (EU 2018/842) to establish new targets for Member States. These targets aim to accelerate emissions reductions, including non-CO₂ emissions from agriculture, and enhance carbon removals within the land sector.

Within the realm of climate action in agriculture, carbon certificates and carbon markets are garnering increasing attention. While carbon certificates for agriculture already exist, the absence of common standards has prompted the European Commission to propose a harmonized EU framework for certifying carbon removals, including carbon farming. This certification framework seeks to establish voluntary standards for carbon certificates. In November 2023, the European Parliament and the Council adopted their respective positions on this proposal, initiating trilogue negotiations. The European Parliament notably improved the Commission's proposal, primarily by stipulating that carbon farming must contribute positively to the protection and restoration of biodiversity and ecosystems. Additionally, the definition of carbon farming was expanded to encompass emissions reductions.

The definition of carbon farming and the methodologies employed to measure carbon certificates can have implications for the organic sector. Organic farmers are already implementing beneficial management practices to enhance soil health and increase carbon sequestration. Consequently, the potential to further augment carbon stocks may be limited for early adopters. However, in carbon markets, demonstrating additionality is essential to generate revenue from carbon certificates. Moreover, a narrow focus on carbon and GHG emissions neglects the broader environmental impacts of agriculture, particularly on biodiversity and ecosystem functions.

An example of legislation that seeks to integrate climate and biodiversity protection is the Nature Restoration Law. Despite vigorous opposition and an aggressive campaign against the legislation, particularly its agricultural targets, a final agreement was reached between the Parliament and the Council in November 2023. In contrast to the European Parliament's position, the final text, as initially proposed by the Commission, incorporates restoration targets for agricultural ecosystems. These targets include the restoration of organic soils in agricultural use, particularly drained peatlands, and a target for increasing the stock of organic carbon in cropland mineral soils.

The agreement has been approved by the ENVI Committee of the European Parliament.¹ The next steps involve a vote in the Plenary of the European Parliament and approval by the Council. Subsequently, it will be incumbent upon Member States to implement comprehensive, systemic solutions, such as organic farming and agroecological practices, to restore nature on agricultural lands.

Tackling soil health at EU level

In contrast to air and water, soil regulation at the EU level has been notably absent. An attempt to establish such regulation in 2006 faltered due to opposition from certain Member States. In the intervening years, soil health has continued to deteriorate, with a concerning 70% of soils in the EU now classified as unhealthy.² However, in July 2023, the European Commission took another significant step towards addressing soil health and introducing EU legislation related to soils.

Rather than the expected Soil Health Law, the European Commission presented a Directive for Soil Monitoring and Resilience. The primary objective of this directive is to establish a harmonized soil monitoring system across the EU. However, it falls short of providing clear, legally binding targets or obligations for Member States to restore unhealthy soils.

Nonetheless, this represents a crucial step in the right direction and signifies a shift towards placing soils on par with air and water in the EU's regulatory framework. Healthy soils are paramount for the production of nutritious and sustainable food and play a pivotal role in delivering a wide range of ecosystem services, including water

¹ The ENVI Committee of the European Parliament is a parliamentary committee responsible for matters related to the environment, public health, and food safety within the European Union (EU). "ENVI" stands for "Environment, Public Health and Food Safety."

² EEA (2019): The European Environment: State and Outlook 2020

purification and carbon sequestration. Soil health stands as a cornerstone of organic farming, and organic farmers have consistently led the way in endeavours to improve soil health and fertility on agricultural lands.

The next stages of this process involve the Council and the Parliament defining their respective positions in spring 2024, paving the way for negotiations between these institutions. This phase is pivotal in shaping the future of soil regulation and conservation within the European Union.

New Genomic Techniques (NGTs)

Following the publication of the legislative proposal in June 2023 regarding "New Genomic Techniques" (NGTs), the policy process within the European Union institutions is currently in full swing as of November 2023.

The primary goal of this proposal is to adapt the regulatory framework concerning Genetically Modified Organisms (GMOs), which involves a shift from the EU's current precautionary approach to biosafety, freedom of choice, and consumer information.

The draft proposal introduces a distinction between NGT crops into two categories: "Category 1 NGT plants" and "Category 2 NGT plants":

- "Category 1 crops" would be subject to less stringent regulations compared to "Category 2 crops." For the latter category, the existing GMO legislative framework would still apply, with some exceptions related to risk assessment, detection methods, and a focus on more "sustainable" NGT crops.
- Both categories of crops would remain prohibited in organic farming.

In June 2023, the organic sector demonstrated strong unity by reaffirming that organic production processes should remain free of Genetically Modified Organisms (GMOs), including those derived from NGTs. This stance is grounded in the belief that gene editing technologies are incongruent with the principles of organic agriculture, the precautionary principle, and consumer expectations.

The pressure on EU institutions to establish a more lenient regulatory framework for NGTs before the European elections in June 2024 is exceptionally high, and the organic movement has a significant stake in this process. The Spanish Presidency of the European Council is committed to making substantial progress during its leadership, conducting frequent Working Group and Ministerial meetings with the aim of potentially holding a vote on parts of the proposal by the end of 2023.

Within the European Parliament, the NGT proposal falls under the purview of the ENVI committee (European Parliament's Committee on Environment, Public Health and Food Safety), with some shared competences on specific articles with the AGRI committee (European Parliament's Committee on Agriculture). A plenary vote on the proposal is expected to occur in January 2024.

Sustainable use of pesticides regulation (SUR)

Throughout 2023, IFOAM Organics Europe has been actively engaged in discussions regarding the proposed regulation for the Sustainable Use of Pesticides (SUR). The imperative to reduce the use of synthetic pesticides is paramount in the effort to

safeguard biodiversity and our natural resources, which serve as the foundation for sustainable farming systems. In this context, IFOAM Organics Europe has consistently emphasized the pivotal role of organic agriculture in the transition toward more sustainable farming practices, given its independence from external inputs like synthetic pesticides.

However, a surprising turn of events occurred on November 22 when the plenary of the European Parliament voted to reject the proposal for the Sustainable Use of Pesticides Regulation. Additionally, they voted against sending the proposal back to the parliamentary committee for further consideration. Consequently, many observers now consider the ambitions to reduce pesticides in Europe to be effectively shelved.

This outcome underscores the significance of organic farming as the way forward towards a more sustainable agriculture that doesn't rely on the use of synthetic pesticides. The failure to agree on an ambitious SUR emphasizes the need to support and expand organic practices and systems, which can serve as a model for environmentally friendly and sustainable agriculture, showcasing alternatives to the overreliance on synthetic chemicals in farming.

Research

Organic farming research has been a recipient of funding through European and national research programs as well as national organic action plans. Starting from the mid-1990s, there has been a growing trend of funding support for organic research projects specifically dedicated to organic food and farming within the EU framework programs for research and innovation. This funding has contributed significantly to the advancement of knowledge and practices in the field of organic agriculture, promoting sustainability and environmental stewardship in farming methods.

Transnational collaboration

The CORE Organic Cofund funding network¹ was renamed CORE Organic Pleiades Network² in 2022. It consists of 41 partners in 27 countries/regions. It announced its first call for projects in the autumn of 2023.

Collaboration with the European Technology Platform for Research & Innovation in Organics and Agroecology (TP Organics)³, as well as other key stakeholders in the sector, has played a crucial role in ensuring that the perspectives and concerns of transnational organizations representing farmers, industry, and civil society are effectively considered and integrated into relevant initiatives and policies.

¹ The CORE Organic Cofund was a funding network that supports research and innovation in the field of organic farming and food systems. It is a collaborative effort among several European countries to jointly fund and coordinate research projects focused on organic agriculture. The name "CORE" stands for "Coordination of European Transnational Research in Organic Food and Farming Systems."

² Information about the Pleiades project can be found at <https://projects.au.dk/coreorganicpleiades/about>

³ TP Organics website: <https://tporganics.eu>

Access to research results via Organic Eprints and Organic Farm Knowledge

The open-access repository Organic Eprints¹, a shared knowledge reservoir for disseminating research outcomes, has existed since 2002. The outcomes of CORE Organic and many other projects are archived on Organic Eprints, which has more than 35'000 entries. Organic Eprints is also the underlying database of the Organic Farm Knowledge platform (www.organic-farmknowledge.org), which provides material for organic practitioners.² Many new tools were added in 2023, and new languages were implemented.

Science Day and Organic Innovation Days 2023

TP Organics' Science Day, which took place during the Biofach Congress 2023 on February 16, centred around the theme "Sustainable organic food innovation labs." This theme aligns with one of the 2024 calls of Horizon Europe. The event brought together a diverse audience, including researchers, policymakers, food-producing, processing, and retail companies, certifiers, auditors, and more. Participants engaged in discussions and shared models and ideas aimed at establishing potential organic food innovation labs. These labs aim to strengthen the entire value chain, particularly in the areas of processing, packaging, and distribution/supply. The event featured presentations from innovative showcases, including the cooperative supermarket SuperCoop Berlin and Good Food Mood Co., an innovative organic company from Jordan that is part of the OrganicEcosystem project. A detailed review of the session is accessible on the TP Organics website.³

On October 25th and 26th, the Organic Innovation Days, TP Organics' annual public event and the sole EU event dedicated to organic and agroecological research and innovation, took place in Brussels. The event's theme was "Citizen-driven transformation of European food systems." In the 2023 edition, TP Organics collaborated with FoodSHIFT 2030, a Horizon 2020 project focused on reshaping the European food system towards a low-carbon, circular future, with an emphasis on reducing meat consumption and promoting plant-based diets. The first day of the event concentrated on research and innovation (R&I) to ensure long-term food security in Europe and globally. On the second day, the FoodSHIFT 2030 Final Policy Conference

¹ Organic Eprints: www.orgprints.org

² In December 2018, the Horizon 2020-funded project OK-Net Ecofeed launched the extended knowledge platform Organic Farm Knowledge www.organic-farmknowledge.net, initially set up in the framework of another EU-funded project, 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, keeping the tools and materials up to date, increasing its reach and making its content available in the national languages and through different channels. In 2022, the platform was translated into several new languages, such as Greek and Czech. Around a hundred new entries were added, as well as videos and e-learning courses. Since 2022, Organic Farm Knowledge has closely collaborated with Horizon Europe projects such as Biofruitnet and OrganicTargets4EU, and all of the projects' research findings are uploaded to the website.

³ Review of Science Day 2023 on the TP Organics website: <https://tporganics.eu/tp-organics-science-day-at-biofach-2023-event-review/>

took place. A comprehensive review of this event is accessible on the TP Organics website.¹

Horizon Europe

Horizon Europe² is the EU's current main funding programme for research and innovation, with a budget of 95.5 billion euros for 2021 – 2027. Cluster 6 of Horizon Europe, "Food, Bioeconomy, Natural Resources, Agriculture and Environment",³ 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.

Three organic-specific projects are funded under the first Work Programme (2021–2022).⁴⁵

The Horizon Europe work programme for 2023-2024 features seven dedicated calls specifically tailored to the organic sector.⁶ These calls are in alignment with the European action plan for organic food and farming.⁷ The plan emphasizes a commitment to allocate a minimum of 30% of the research and innovation budget designated for agriculture, forestry, and rural areas to topics that are either directly pertinent to the organic sector or hold relevance for it.

Horizon Europe introduces a set of innovative instruments known as the EU Missions. Among these missions, "A Soil Deal for Europe" has a compelling vision to create 100 living labs and lighthouses that will spearhead the shift toward healthier soils by the year 2030. TP Organics has been actively contributing to this mission, and their efforts have been noteworthy.

¹ Review of the 2023 Organic Innovation Days: <https://tporganics.eu/organic-innovation-days/>

² Horizon Europe website: https://commission.europa.eu/funding-tenders/find-funding/eu-funding-programmes/horizon-europe_en

³ Cluster 6 of Horizon Europe, "Food, Bioeconomy, Natural Resources, Agriculture and Environment": 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

⁴ Horizon Europe Work Programme 2023-2024: https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/horizon-europe-work-programmes_en

⁵ The following projects are funded under the second work programme. In addition, several other projects, such as ..., are relevant for the organic sector.

⁶ The organic-specific calls are: Selective breeding programme for organic aquaculture - Improving yields in organic cropping systems - Increasing the availability and use of non-contentious inputs in organic farming - Sustainable organic food innovation labs - Pilot network of climate-positive organic farms - Developing an EU advisory network on organic agriculture - Organic farming thematic networks to compile and share knowledge ready for practice.

⁷ Organic Action Plan for the European Union: https://agriculture.ec.europa.eu/farming/organic-farming/organic-action-plan_en

In 2022, TP Organics took a significant step by publishing a comprehensive position paper that outlines the research needs in the context of soil-related organic practices.¹ Additionally, they conducted a ground-breaking study focused on organic living labs and lighthouse farms across Europe.² These initiatives underscore the organic sector's capacity for innovation, illustrating its dedication to enhancing organic practices and serving as an inspirational force for the broader transformation of the agri-food system. Furthermore, TP Organics (with IFOAM Organics Europe as an official partner) plays a pivotal role in the new European Research and Innovation (R&I) Partnership focused on agroecology living labs and research infrastructures.³ TP Organics specifically contributes to Work Package 2, which centres on fostering science-policy dialogue.

Additionally, TP Organics holds an Advisory Board membership in the FOODPathS project, which is actively preparing the "FutureFoodS" Partnership for Sustainable Food Systems.⁴ Both of these projects are slated to commence in late 2023 or early 2024, with funding provided jointly by the European Commission and Member States.

It is worth noting that TP Organics has been instrumental in shaping the Strategic Research and Innovation Agendas for these partnerships, actively participating in their development. These agendas are currently in the finalization stages, signifying TP Organics' significant contributions to advancing research and innovation in sustainable food systems within the European context.

European Organic Congress: On the road to achieving the EU Green Deal

The European Organic Congress⁵, jointly organised by IFOAM Organics Europe and Ecovalia during the Spanish Presidency of the Council of the European Union, took place in September 2023 in Córdoba, Spain, under the theme of "Organic Innovating Sustainable Food Systems." The event offered a valuable platform for participants to engage in meaningful discussions surrounding critical organic topics. It served as a knowledge-sharing forum to address the current challenges faced by the organic sector and to draw inspiration from exemplary case studies and pioneering narratives spanning various aspects of the organic industry. The high-level speakers, including representatives from the European Commission, European Parliament and local governments, unanimously affirmed the significance of the 25% target for organic land by 2030 as a crucial part of the solution.

¹ TP Organics (2022): Leveraging the potential of organic in the Mission "A Soil Deal for Europe": Priority topics for Missions Work Programme 2023-2024. TP Organics, Brussels. Available at https://tporganics.eu/wp-content/uploads/2022/02/TPO_RnI_HorizonEU_SoilMission_Position_202202.pdf

² TP Organics (2022): Organic Living Labs and Lighthouse Farm in Europe. TP Organics Brussels. Available at https://tporganics.eu/wp-content/uploads/2022/10/TPO_Study_Organic_Living_Labs_2022.pdf

³ European research and innovation (R&I) partnership on agroecology living labs and research infrastructures: https://research-and-innovation.ec.europa.eu/research-area/agriculture-forestry-and-rural-areas/ecological-approaches-and-organic-farming/partnership-agroecology_en

⁴ FOODPathS: <https://www.foodpaths.eu/>
European R&I Partnership for Sustainable Food Systems: <https://scar-europe.org/index.php/food-main-actions/food-systems-partnership>

⁵ <https://www.europeanorganiccongress.bio/>

Many speakers reiterated the organic sector's systemic approach, highlighting its capacity to address complex challenges such as climate change, biodiversity loss, and fairness in the supply chain. Organic farming, they emphasised, provides a means to tackle these multifaceted issues.

During the panel discussion on plant breeding techniques, the importance of a healthy and diverse agri-food system in fostering resilience was underscored. The panel emphasised that sustainability claims associated with new genomic techniques (new GMOs) remain speculative, carrying potential risks such as increased pesticide resistance, biodiversity loss, and a surge in patents. These developments could hinder growers' and breeders' access to seeds. In contrast, organic breeding harnesses the resources available in nature and enhances the resilience of existing varieties and ecosystems. EU legislation, the panel argued, must safeguard GMO-free and organic production from contamination through mandatory traceability throughout the production chain and end-of-product labelling for consumer information. This is deemed the only way for genuine "coexistence."

Notable regional initiatives, such as Portugal's Biodistrict Idanha Nova (EU Organic Award 2023 winner!) and France's regional organic labels, were highlighted. On the market front, retailers provided valuable insights into fostering fairness along the supply chain, increasing organic sales, and encouraging consumers to choose organic products.

Government agencies at all levels were encouraged to promote sustainable public procurement, recognising the multiple benefits this brings to both food producers and consumers, as well as the resilience of ecosystems. The organic sector was advised to utilise EU promotion policies to enhance the visibility of European organic products. The OrganicTargets4EU project¹ was recognised for its efforts in creating models to help achieve the EU's target of 25% organic land by 2030. Regardless of the specific models employed, project participants unanimously agreed that the growth of the organic sector should adhere to the core principles of organic farming.

¹ <https://organictargets.eu/>

Europe and the European Union: Key indicators 2022

Indicator	Europe	European Union ¹	Top 3 countries in Europe
Organic farmland	18.5 million hectares (ha)	16.9 million ha	France (2.9 million ha); Spain (2.7 million ha); Italy (2.3 million ha)
Organic share of total farmland	3.7 %	10.4 %	Liechtenstein (43.0%); Austria (27.5%); Estonia (23.4%)
Increase in organic farmland 2021-2022	0.19 million ha	0.83 million ha	Greece (+0.39 million ha); Italy (0.16 million ha); France (+0.10 million ha)
%-Increase in organic farmland	1.0%	5.1%	Greece (+73.0%); Kosovo (+55.2%); Bulgaria (+28.0%)
Land use	Arable crops: 8.4 million ha; Permanent crops: 2.4 million ha; Permanent grassland: 7.4 million ha	Arable crops: 7.6 million ha Permanent crops 2.2 million ha Permanent grassland: 6.9 million ha	
Top arable crop groups	Cereals: 2.9 million ha Green fodder: 2.7 million ha Oilseeds: 0.7 million ha	Cereals: 2.6 million ha Green fodder: 2.6 million ha Dry pulses: 0.5 million ha	Largest arable areas: France (1.6 million ha); Italy (1.1 million ha); Germany (0.8 million ha)
Top permanent crop groups	Olives: 0.6 million ha Grapes: 0.5 million ha Nuts: 0.5 million ha	Olives: 0.6 million ha Grapes: 0.5 million ha Nuts: 0.4 million ha	Largest permanent crop areas: Spain (0.8 million ha); Italy (0.6 million ha); France (0.2 million ha)
Wild collection area	11.3 million ha	7.3 million ha	Finland (6.9million ha); North Macedonia (0.6 million ha), Albania (0.5 million ha)
Producers	480'135	419'112	Italy (82'593); Greece (58'691); France (58'413)
Processors	91'775	85'956	Italy (23'602); Germany (21'981); France (19'311)
Importers	7'609	6'450	Germany (1'944); Switzerland (687); France (662)
Retail sales	53.1 billion euros	45.1 billion euros	Germany (15.3 billion euros); France (12.1 billion euros); Switzerland (3.7 billion euros)
Development of retail sales 2021-2022	-2.2%	-2.8%	Estonia (6.0 %); Netherlands (4.4 %); Austria (4.1 %)
Organic share of the total market	No data	No data	Denmark (12.0 %); Austria (11.5%); Switzerland (11.2 %)
Per capita consumption	64	102 euros	Switzerland (437 euros); Denmark (365 euros); Austria (274 euros)
EU organic imports		2.73 million metric tons (MT)	Netherlands (0.99 million MT); Germany (0.45 million MT); France (0.27 million MT)
Exports to EU		Bananas (0.71 million MT) Oilcake (0.23 million MT) Soybeans (0.19 million MT)	Ecuador (0.35 million MT); Dom. Rep. (0.25 million MT); Ukraine (0.22 million MT);

Source: FiBL-AMI survey 2024. For detailed data sources, see annex, page 335.

¹ Please note that the 2022 data for the European cover the 27 countries that were members of the European Union in 2022.

Organic Farming and Market Development in Europe and the European Union¹

HELGA WILLER,² BERNHARD SCHLATTER,³ JAN TRÁVNÍČEK,⁴ AND DIANA SCHAACK⁵

In 2022, the development of the organic sector in Europe exhibited various trends in key indicators. While organic farmland and the number of producers increased, retail sales and EU organic imports declined.

Both the organic farmland and the market will need to grow at a faster rate to achieve the 25 percent organic area share goal by 2030, as outlined by the European Commission (2020) in its Farm to Fork strategy for the European Union.

I Key facts and figures: Production and market highlights

More than 18 million hectares of farmland were organic in Europe in 2022 – France had the largest area

In Europe, 18.5 million hectares were managed organically in 2022, with the EU accounting for 16.9 million hectares. France maintained its position as the leading country in terms of farmland under organic management, with almost 2.9 million hectares, followed by Spain (2.7 million hectares), Italy (2.3 million hectares), and Germany (1.9 million hectares). These four countries collectively account for more than half of the European organic farmland.

European organic farmland increased by almost 0.8 million hectares

Organic farmland increased by 0.8 million hectares in the European Union; however, it only increased by 0.2 million hectares in Europe, mainly due to significant decreases in Russia and Ukraine. This represents an increase of 1.0 percent in Europe and 5.1 percent in the EU. To achieve the EU's goal of having 25 percent organic farmland by 2030, an annual growth rate of 10 percent is required.

¹ Please note that the data related to the European Union (EU) in this yearbook are not comparable to what was presented in editions prior to 2021. All EU data, including historical data, in this volume pertain to the EU 27, which comprises the 27 member states of the EU in 2022.

Additionally, since 2021, Eurostat, the statistical office of the European Union and a primary data source for many European countries (not limited to the EU), no longer provides in-conversion data per crop. For this edition, we estimated the in-conversion area by crop because we wanted to avoid conveying a reduction in crop areas when, in reality, there was none.

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Liechtenstein continued to be the country with the highest organic area share in the world

Organic farmland in Europe accounted for 3.7 percent of the total agricultural land, while in the European Union, it constituted 10.4 percent. In Europe, and globally as well, Liechtenstein had the highest organic share of all farmland at 43.0 percent, followed by Austria, which is the EU country with the highest organic share of agricultural land at 27.5 percent. Additionally, some EU countries that are already close to the goal include Estonia, with 23.0 percent, and Sweden, with 20.2 percent.

In Europe, almost half of the organic farmland was used for arable crops, strong growth of oilseeds

In both Europe and the EU, arable land is the most important land use type, accounting for 45 percent of organic farmland, followed by permanent grassland at 40 percent, and permanent crops at 13 percent. The primary arable crop group was cereals, covering 2.9 million hectares in Europe (EU: 2.6 million hectares), while for permanent crops, olives occupied 0.6 million hectares. The most notable growth between 2021 and 2022 occurred in the oilseed sector, witnessing a substantial 6 percent increase within the European Union (EU). This surge was driven by concerns that the ongoing conflict could disrupt oilseed supplies from Ukraine and Russia. Conversely, there was a decrease in organic farmland dedicated to oilseed cultivation across Europe, primarily attributed to a decline in Russia's organic farming activities. The highest area share, exceeding 24.5 percent in the EU, was attributed to dry pulses.

More than 480'000 organic producers and almost 10'000 organic processors

There were more than 480'000 organic producers in Europe, with almost 420'000 in the EU, with the largest numbers in Italy (82'593). The number of producers increased by 7.5 percent in Europe and by 9.5 percent in the European Union.

There were 91'775 organic processors in Europe, a 3.9 percent increase compared to 2021, and 85'956 in the European Union, a 3.4 percent increase. The country with the largest number of processors was Italy (23'602).

In contrast to previous years, the number of importers declined: More than 7'600 (-2.6 percent) were counted in Europe, and more than 6'400 in the European Union (-1.8 percent). Germany had the highest number of importers (1'944).

Organic imports: Ecuador continued to be the largest supplier, and tropical fruit remained the most important commodity group

Data on organic imports to the European Union in 2022 showed that 2.73 million metric tons of organic products were imported, marking a decrease of 5.1 percent compared to 2021. Ecuador was the largest supplier, providing 0.35 million metric tons of organic products. The primary product group was tropical fruits (mainly bananas), accounting for 0.87 million metric tons, which experienced a decrease of 3.4 percent. However, there were increases in oilseed imports, including soybeans. The Netherlands, acting as a re-exporter for other European countries, was the largest EU importer.

Retail sales exceeded 53 billion euros in Europe

Organic retail sales in Europe were valued at 53.1 billion euros, with 45.1 billion euros in the EU, making the EU the second-largest single market for organic products in the world, following the United States. Germany led the European market with 15.3 billion euros in retail sales, making it the second-largest market globally.

Both the European and EU organic markets experienced declines of 2.2 percent and 2.8 percent, respectively. However, in some countries, such as Estonia, the Netherlands, and Austria, retail sales increased in 2022. From 2013 to 2022, the values of Europe's and the European Union's organic retail sales more than doubled.

The highest organic market shares and per capita consumption are found in Europe

Globally, European countries lead in organic food sales shares as percentages of their respective food markets. Denmark had the highest global organic market share at 12.0 percent, followed by Austria at 11.5 percent, and Switzerland at 11.2 percent.

In 2022, European consumers spent an average of 64 euros on organic food per person (EU: 102 euros). Per capita consumer spending on organic food has doubled over the past decade. Swiss and Danish consumers topped the list, spending the most on organic food at 437 and 365 euros, respectively.

For detailed data on organic farming and market development in Europe and the European Union, please refer to the tables provided in the Annex, section 2.3 Organic Agriculture in Europe and the European Union: Tables, page 317.

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 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.

2. Organic agricultural land: Area, organic share the of total, growth

Organic agricultural land

- In 2022, 18.5 million hectares were farmed organically in Europe and 16.9 million hectares in the European Union (EU).
- The countries with the largest organic farmland areas were France (accounting for 16 percent of Europe's organic farmland), followed by Spain, Italy, and Germany. These four countries collectively accounted for more than half of Europe's organic farmland and more than 60 percent of the EU's organic farmland.
- Europe held almost one-fifth of the world's organic farmland, representing 19 percent of the global total.

Organic shares of total agricultural land

- In Europe, 3.7 percent of agricultural land was organic in 2022, while in the EU, it reached 10.4 percent, surpassing the 10 percent mark for the first time.
- In 16 countries (14 in the EU), 10 percent or more of agricultural land was managed organically.
- The countries with the highest organic area shares were Liechtenstein (43.0 percent), Austria (27.5 percent), Estonia (23.4 percent), and Sweden (19.9 percent). Liechtenstein has the highest organic farmland share in the world.

Growth of organic agricultural land

- In 2022, the organic agricultural land in Europe increased by 0.2 million hectares (EU: 0.8 million hectares), representing a growth rate of 1.0 percent (EU: 5.1 percent).
- The countries that contributed the most to this growth were Greece, Italy, and France, collectively adding more than 600'000 hectares. Conversely, there was a significant decrease in Ukraine and Russia, with a reduction of 600'000 hectares.
- The highest relative increases were observed in Greece, Kosovo, and Bulgaria, while the highest relative decreases occurred in Russia (-71%) and Ukraine (-37%).

Conversion status of organic farmland

- In Europe, of the 18.5 million hectares of organic agricultural land, at least 12.0 million hectares were fully converted (10.8 million out of 16.9 million hectares in the EU).

Table 21: Europe: Organic agricultural land in Europe and the European Union 2022

	Organic area [million ha]	Organic share [%]	Change 2021-2022 [%]	Change 2021-2022 [million ha]	Change 2013-2022 [%]	Change 2013-2022 [million ha]
European Union	16.9	10.4%	5.1%	+0.8	76.1%	7.3
Europe	18.5	3.7%	1.0%	+0.2	62.3%	7.1

Source: FiBL-AMI survey 2024 based on Eurostat and national data sources.

Europe: Organic agricultural land by country 2022

Source: FiBL-AMI survey 2024

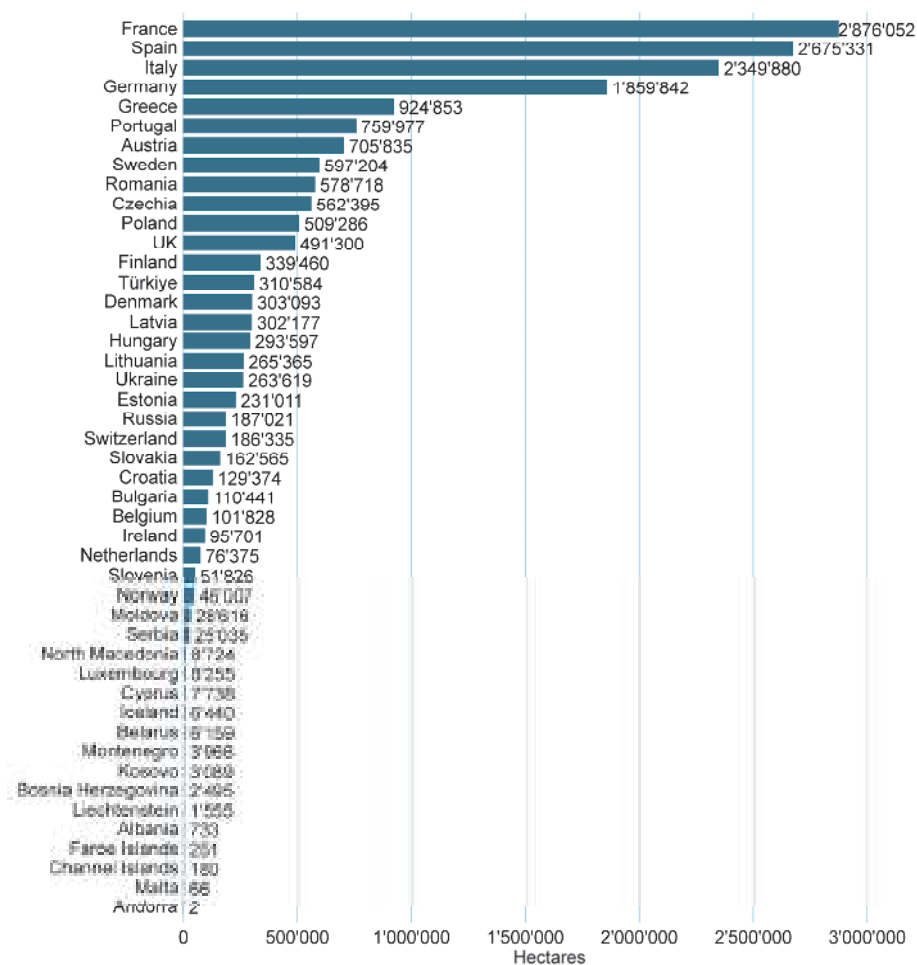


Figure 66: Europe: Organic agricultural land by country 2022

Source: FiBL-AMI survey 2024 based on Eurostat and national data sources.

For detailed data sources. For detailed data sources, see annex, page 335.

Europe: Organic shares of total agricultural land 2022

Source: FiBL-AMI survey 2024

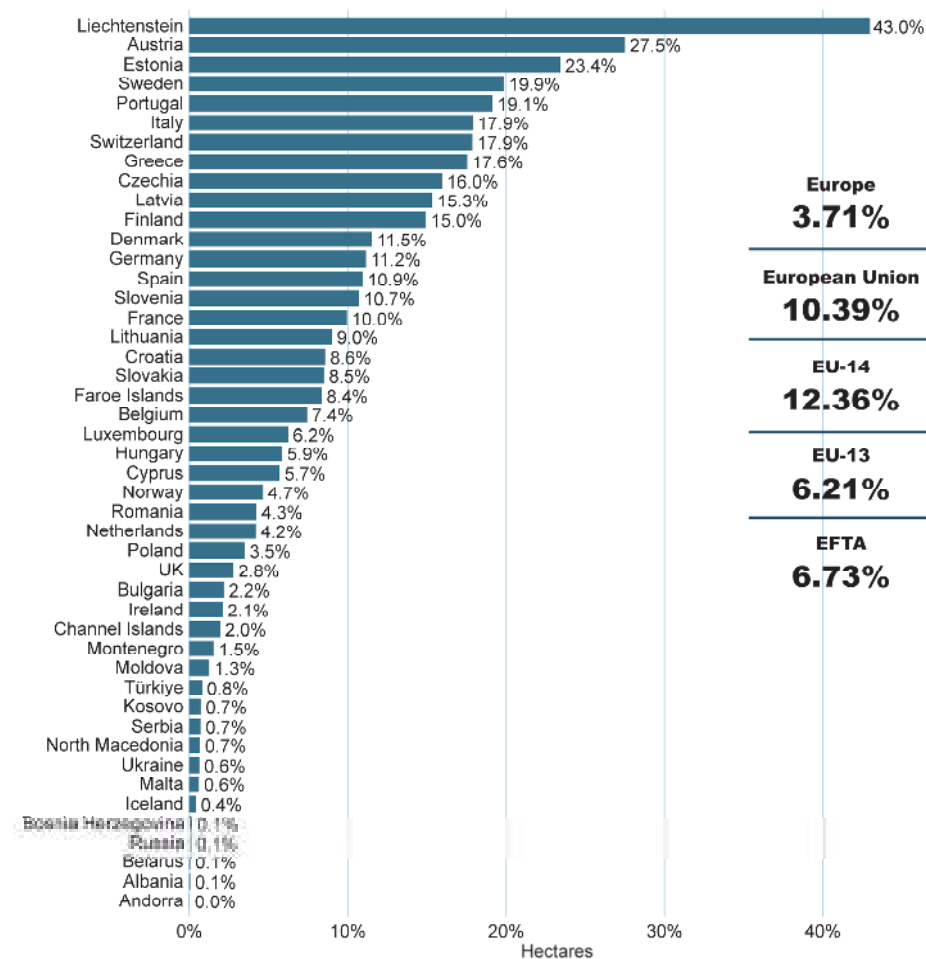


Figure 67: Europe: Organic shares of total agricultural land 2022

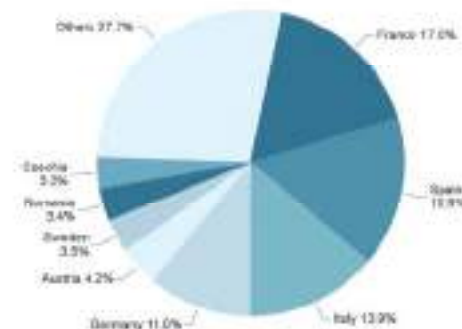
Source: FiBL-AMI survey 2024 based on national data sources and Eurostat. For detailed data sources, see annex, page 335.

Explanation: European Union includes 27 Member States. It consists 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.

EFTA is the European Free Trade Association (EFTA): Iceland, Norway, Liechtenstein, Switzerland.

European Union: Distribution of organic farmland by country 2022

Source: FiBL-AMI survey 2024



Europe: Distribution of organic farmland by country 2022

Source: FiBL-AMI survey 2024

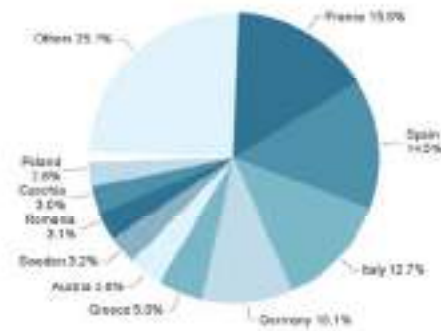


Figure 68: Europe and European Union: Distribution of organic farmland by country 2022

Source: FiBL-AMI survey 2024 based on national data sources and Eurostat
For detailed data sources, see annex, page 335.

Europe and the European Union: Development of organic agricultural land 2000 - 2022

Source: FiBL-AMI surveys 2001-2024, based on the national data sources and Eurostat

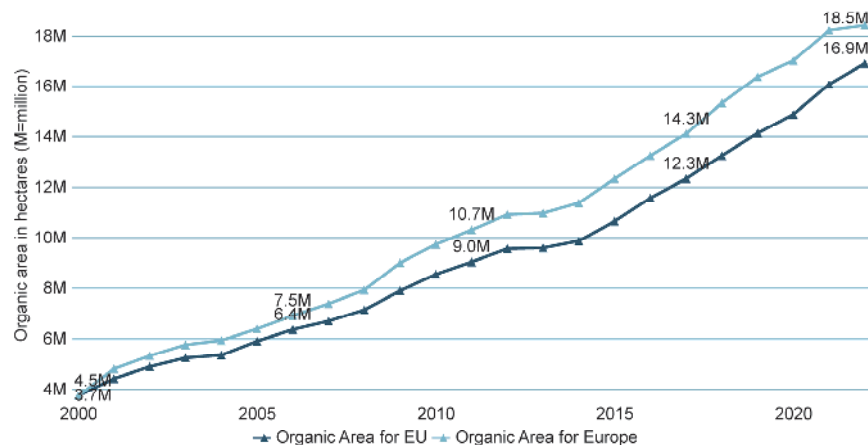


Figure 69: Europe and the European Union: Development of organic agricultural land 2000-2022

Source: FiBL-AMI Surveys 2006-2024 based on national data sources and Eurostat. The data for the European Union covers all countries that were members of the European Union in 2022

Europe: Growth rates for organic agricultural land in Europe and the European Union 2000 - 2022

Source: FiBL-AMI surveys 2001-2024, based on national data sources and Eurostat

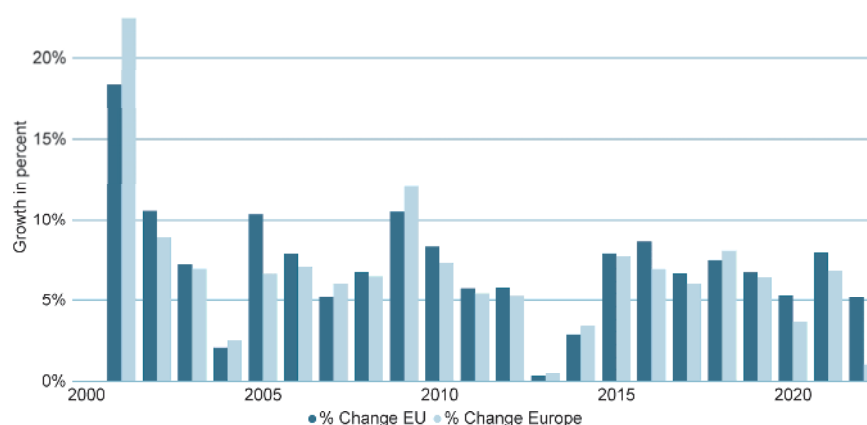
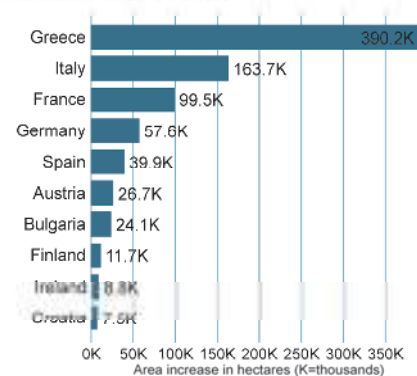


Figure 70: Europe: Growth rates for organic agricultural land in Europe and the European Union 2000-2022

Source: FiBL-AMI Surveys 2002-2024 based on national data sources and Eurostat

Europe: The ten countries with the highest growth in organic agricultural land in hectares 2022

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



Europe: The ten countries with the highest growth in organic agricultural land in percentage 2022

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

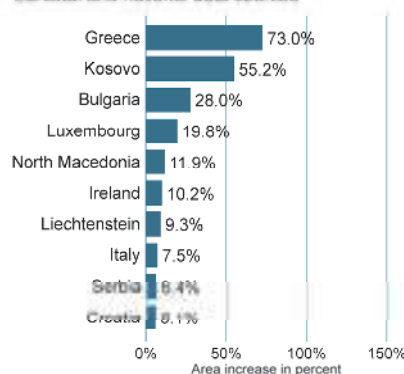


Figure 71: Europe: The ten countries with the highest growth in organic agricultural land in hectares and relative growth in 2022

Source: FiBL-AMI survey 2024 based on national data sources and Eurostat

For detailed data sources, see annex, page 335.

3 Land use and crops grown in organic agriculture

Land use^{1,2}

For all countries in Europe, information on land use and crop details is available. The area dedicated to all land use types has shown steady growth since 2004. However, in 2022, there was a decrease in organic arable land in Europe, primarily due to area losses in Russia and Ukraine. It's important to note that updated data on land use and crops were not available for all European countries in 2022. Additionally, Eurostat no longer provides information on in-conversion areas for crops, which has necessitated the need for estimates in many countries regarding current organic conversion areas by crop.

Table 22: Europe and the European Union: Land use 2022

Crop group	Europe [Million hectares] (Share of total)	European Union [Million hectares] (Share of total)	Change 2021-2022 Europe/EU [%]	Change 2013-2022 Europe/EU [%]
Arable land	8.4 (3.8%)	7.6 (7.6%)	-3.8%/+4.0%	+68.7%/+86.4%
Permanent grassland	7.4 (4.3%)	6.9 (13.6%)	+2.3%/+2.4%	+56.6%/+66.9%
Permanent crops	2.4 (13.6%)	2.2 (17.8%)	+11.8%/+14.1%	+81.6%/+88.9%
Total	18.5 (3.7%)	16.9 (10.4%)	1.0%/+5.1%	+62.3%/+76.1%

Source: FiBL-AMI survey 2024 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

- **Arable land** constitutes a large part of organic farmland, with 8.4 million hectares in Europe and 7.6 million hectares in the EU. Arable land declined in Europe, as less areas were reported for the Russian Federation and Ukraine (organic cereal, oilseeds and dry pulses areas).
- **Permanent grassland** accounted for 7.4 million hectares in Europe and 6.9 million hectares in the EU.
- **Permanent crops** constituted 13.6 percent of the total permanent cropland in Europe and 17.8 percent in the European Union, with 2.4 and 2.2 million hectares, respectively.
- For more information including breakdown by country, see Table 22, Figure 73, Figure 74, Figure 75, Figure 75.

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

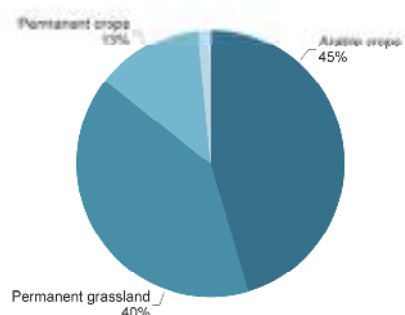
› Permanent crops (fruit trees and berries, olive groves and vineyards).

² In 2004, FiBL started its data collection on organic crop and land use data.

Europe and European Union: Use of organic agricultural land 2022

Source: FiBL-AMI survey 2024

Europe



European Union

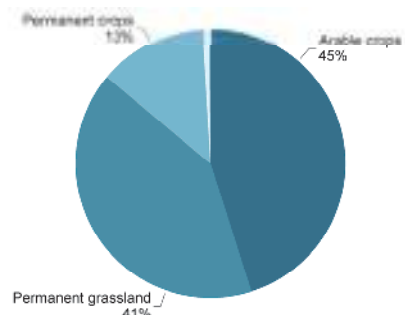


Figure 72: Europe and European Union: Distribution of land use in organic agriculture 2022

Source: FiBL-AMI survey 2024 based on Eurostat and national data sources

Europe: Land use in organic agriculture by top ten countries 2022

Source: FiBL-AMI survey 2024

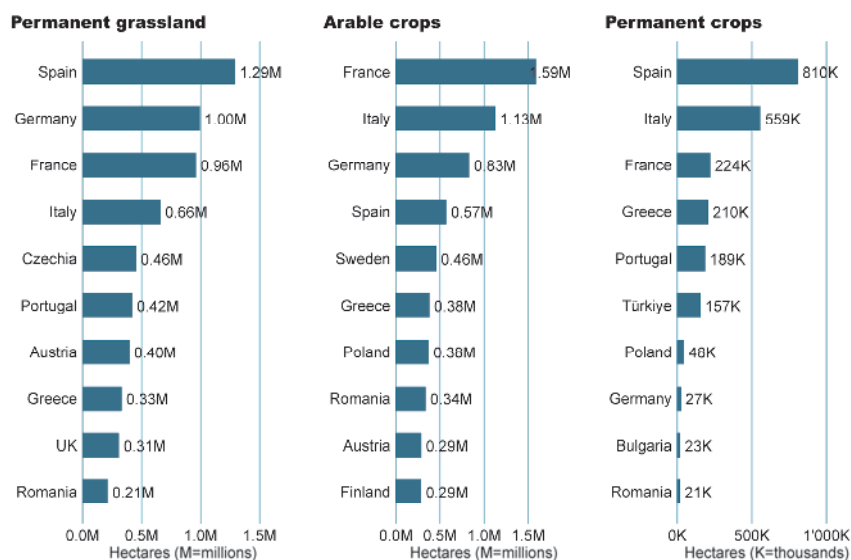


Figure 73: Europe: Land use in organic agriculture - top 10 countries 2022

Source: FiBL-AMI survey 2024 based on Eurostat and national data sources

Europe: Growth in organic agricultural land by land use type 2000 - 2022

Source: FiBL-AMI survey 2024

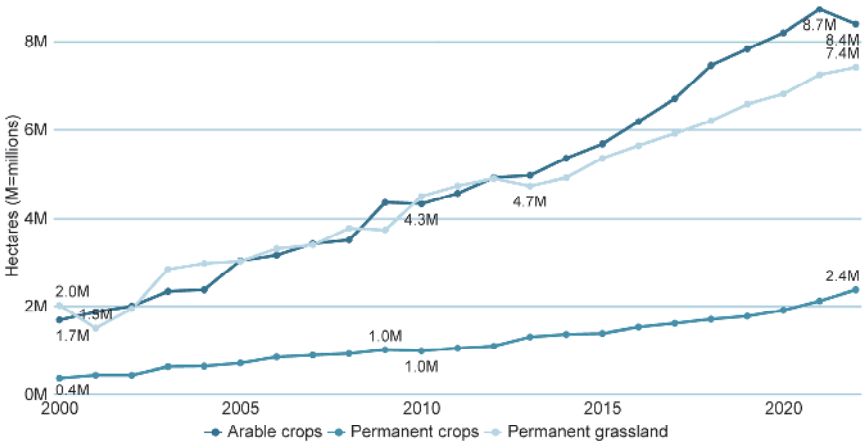


Figure 74: Europe: Growth in organic agricultural land by land use type 2004-2022

Source: FiBL-AMI Surveys 2006-2024 based on national data sources and Eurostat

European Union: Growth in organic agricultural land by land use type 2000 - 2022

Source: FiBL-AMI survey 2024

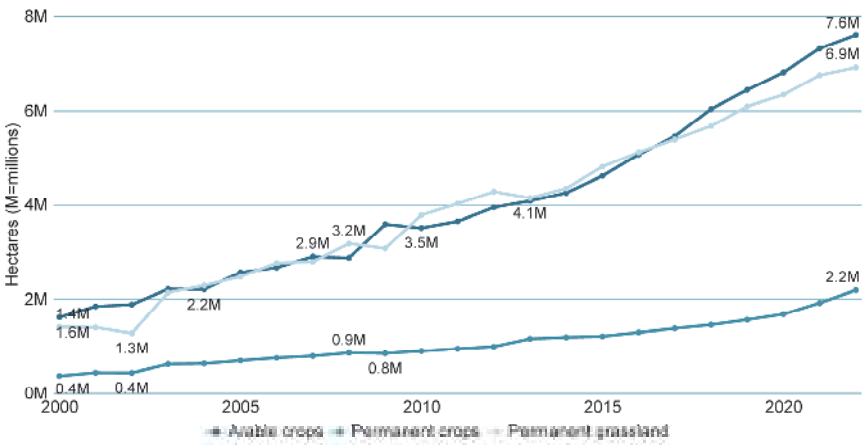


Figure 75: European Union: Growth in organic agricultural land by land use type 2004-2022

Source: FiBL-AMI Surveys 2006-2024 based on national data sources and Eurostat

Crops grown in organic agriculture

In 2021, all key arable and permanent crop groups showed growth in the European Union. The primary arable crop group was cereals, covering 2.9 million hectares in Europe (EU: 2.6 million hectares), while for permanent crops, olives occupied 0.6 million hectares.

The most significant growth from 2021 to 2022 was observed in oilseeds, with a 6 percent increase in the EU, though there was a decline in organic farmland for oilseeds in Europe as a whole, due to the area decreases in the Russian Federation and Ukraine. The highest area share, exceeding 24.5 percent in the EU, was attributed to dry pulses (Table 23).

Table 23: Europe and the European Union: Key crops/crop group 2022

Crop group		Area (ha)		Organic share (%)		Change 2021-2022 (%)		Change 2013-2022 (%)	
		Europe	EU	Europe	EU	Europe	EU	Europe	EU
Arable crops	Cereals	2'911'927	2'596'576	2.2%	4.9%	-5.2%	2.5%	56.4%	73.9%
	Dry pulses	539'553	512'379	9.2%	24.5%	-16.2%	-10.0%	113.1%	125.5%
	Fresh vegetables	215'460	199'250	4.8%	9.9%	-5.3%	-0.1%	98.2%	125.0%
	Green fodder	2'748'086	2'592'192	12.4%	12.8%	-0.2%	0.1%	40.1%	55.0%
	Oilseeds	694'774	489'321	1.8%	4.4%	-25.4%	6.0%	247.1%	212.1%
	Root crops	60'140	58'040	0.8%	1.8%	2.1%	1.8%	46.6%	98.2%
Permanent crops	Berries*	40'566	37'216	13.0%	24.8%	-2.3%	2.2%	30.8%	31.9%
	Citrus fruit	61'212	60'504	8.8%	11.6%	2.8%	3.0%	63.3%	63.7%
	Fruit, temperate	166'941	148'399	6.1%	12.2%	-0.4%	1.0%	27.5%	31.1%
	Fruit, (sub)tropical	46'065	25'461	19.1%	15.1%	12.9%	5.2%	86.2%	192.7%
	Grapes	490'548	478'181	12.6%	15.0%	2.3%	2.4%	89.2%	94.9%
	Nuts*	455'289	408'599	16.5%	29.7%	1.8%	5.2%	140.9%	148.8%
	Olives	656'995	600'865	10.9%	11.8%	0.6%	1.5%	37.0%	44.3%

Source: FiBL-AMI survey 2024 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 72 and statistics.fibl.org. * For berries and nuts the total areas are not directly comparable with the organic areas.

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 11.3 million hectares (European Union: 7.3 million hectares). The largest wild collection area in Europe (and in the world) was in Finland with 6.9 million hectares (mainly berries). For country details on wild collection areas, see Table 68, page 321.

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 group over the years.

Table 24: Europe and European Union: Organic operators 2022

	Europe			European Union		
	No.	Change 1 year	Change 10 years	No.	Change 1 year	Change 10 years
Producers	480'135	7.5%	45.0%	419'112	9.5%	66.0%
Processors	91'775	3.9%	99.4%	85'956	3.4%	100.5%
Importers	7'609	-2.6%	132.7%	6'450	-1.8%	113.9%
Exporters	4'885	2.0%	N/A	4'181	2.6%	N/A

Source: FiBL-AMI survey 2024 based on national data sources and Eurostat. For a breakdown by country, see. annex.

Organic producers

- In 2022, there were more than 480'000 organic **producers** in Europe and almost 420'000 in the EU. The country with the largest number of producers was Italy (more than 80'000).
- Growth in the EU (+9.5 percent) was stronger than in Europe as a whole (7.5 percent). Over the decade 2013-2022, the number of producers in Europe increased by 45 percent (EU: 66 percent). A bit more than ten percent of the world's organic farmers, are in Europe.

Organic processors and importers

- There were almost 92'000 organic processors in Europe (+3.9 percent compared to 2021) and more than 85'000 in the European Union (+3.4 percent). The country with the largest number of processors was Italy (23'602).
- In contrast to previous years, the number of importers declined: More than 7'600 (-2.6 percent) were counted in Europe, and more than 6'400 in the European Union (-1.8 percent). Germany had the highest number of importers (1'944).
- For more information see Table 24, Figure 77, Figure 78.

Europe and the European Union: Development of the number of organic producers 2000 - 2022

Source: FiBL survey 2024

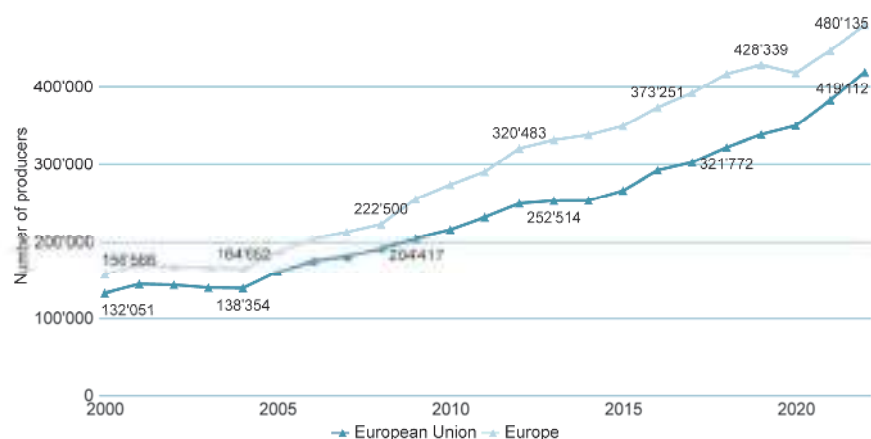
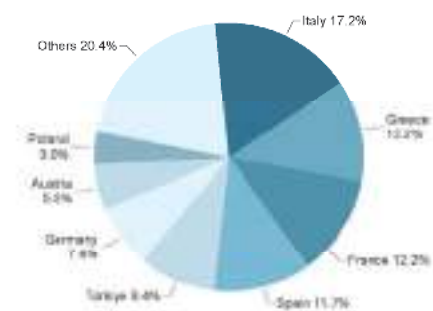


Figure 76: Europe and the European Union: Development of the number of organic producers 2000-2022

Source: FiBL-AMI surveys 2002-2024 based on national data sources and Eurostat

Europe: Distribution of organic producers 2022

Source: FiBL-AMI survey 2024



Europe: Distribution of organic processors 2022

Source: FiBL-AMI survey 2024

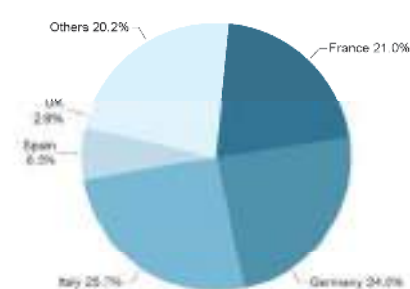


Figure 77: Europe: Distribution of organic producers and processors by country 2022

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

Europe: Organic producers by country 2022

Source: FiBL survey 2024

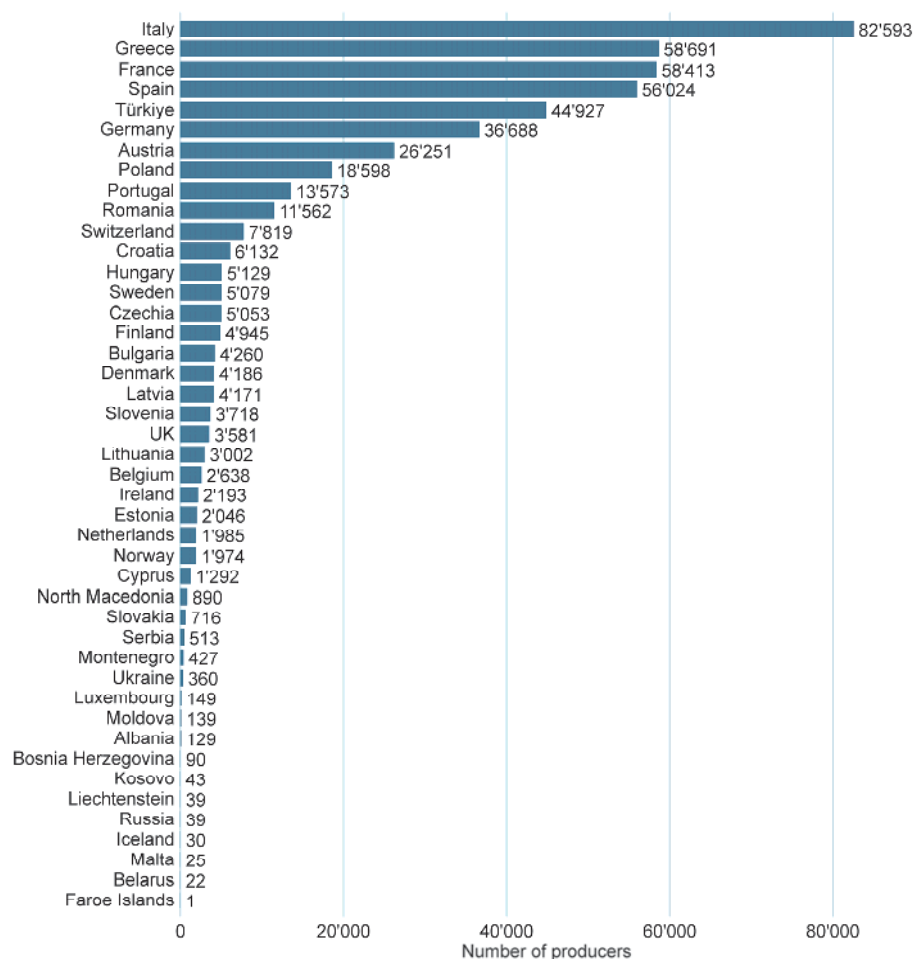


Figure 78: Europe: Number of organic producers by country 2022

Source: FiBL-AMI survey 2024 based on national data sources and Eurostat. For detailed data sources, see annex, page 335.

5 Organic imports and exports

The European Union, representing the second-largest organic single market, has shared data on its organic imports. This marks the fifth instance of them providing information on key import products and the primary importing countries, based on volume in metric tons (MT). For further details, including figures, please refer to the European Commission's contribution on EU organic imports (page 212).

Additionally, the United States offers both export and import data, including volume and value, although this information does not cover all commodities.

Some European countries also provide export and import values. However, since the latter dataset is incomplete, drawing conclusions regarding total values and growth rates for Europe or the European Union becomes challenging (see page 324, Table 71).

- **EU organic import volume:** In 2022, the EU imported a total of 2.73 million MT of organic agri-food products.
- **EU organic import volume development:** Compared to 2021, EU organic imports declined by 5.1 percent.
- **EU organic import volume by importing country:** The largest importers (based on import volume in metric tons) were the Netherlands (1.0 million MT), followed by Germany and France. It's important to note that a significant portion of Dutch imports is resold to other EU countries.
- **EU organic import volume by exporting country:** Ecuador was the largest supplier of organic agri-food products to the EU, providing 0.35 million MT, which corresponds to more than 10 percent of the total organic import volume. The most substantial increase in volume was noted for Togo (an increase of almost 60,000 MT, mainly soybeans).
- **EU organic import volume by product group:** Tropical fruit was the most important product group, accounting for 0.9 million MT (one-third of all EU organic imports, primarily bananas), followed by oil cakes and soybeans, with the latter increasing by over 50 percent.
- **European export volumes to the US:** According to US data, European countries exported a volume of at least 0.28 million metric tons to the United States, constituting 13 percent of all US organic imports. Approximately 60'000 MT came from Turkey. Please note that the US organic import statistics covers only selected products/product groups.
- **European export and import value:** Limited data is available on this. Italy showed the largest export value (2.9 billion euros in 2021), and France had the highest import value (2.8 billion euros in 2021). Unfortunately, no such data was available from Germany, the largest market in Europe (Table 71, page 324).

Europe: Exports to the US by country 2022

Source: GATS/USDA 2022

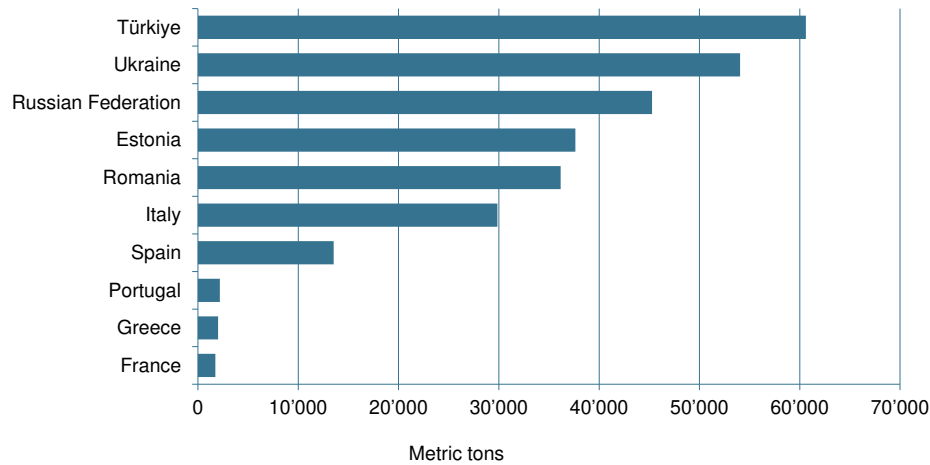


Figure 79: European organic exports to the US: Top 10 European exporters

Source: GATS/USDA

Europe: Organic exports to the US 2018-2022

Source: GATS/USDA

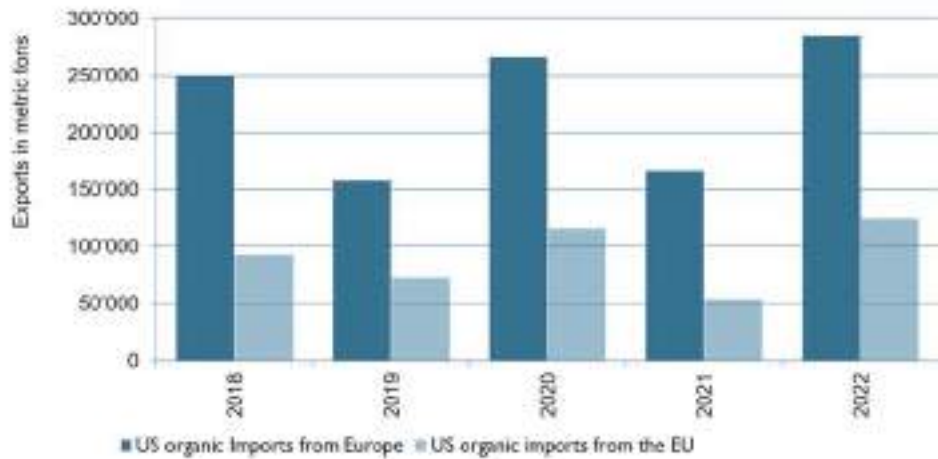


Figure 80: European organic exports to the US: Development 2018-2022

Source: GATS/USDA

6 Organic retail sales

In 2022, organic retail sales in Europe reached 53.1 billion euros (45.1 billion euros in the EU), experiencing a decline of 2.2 percent in Europe and 2.8 percent in the European Union. This marked the first decrease in organic retail sales in Europe and the European Union since records began in 2000. 2022 proved to be a challenging year for the organic sector due to factors such as the war in Ukraine, high energy costs, and the rising cost of living, which contributed to inflation in many countries.

Unfortunately, not all countries provide data on their domestic markets regularly, and it may be assumed that the market is larger than indicated in this volume.

Figures on the organic retail sales can be found on the following pages; tables are in the annex.

Table 25: Europe and the European Union: Organic retail sales 2022: Key data

	Retail sales [Million €]	Per capita consumption [€]	Growth 2021-2022 [%]	Growth 2013-2022 [%]
Europe	53'070.4	64	-2.2%	+119.3%
European Union	45'098.5	102	-2.8%	+124.7%

Source: FiBL-AMI survey 2024 based on national data sources. For detailed data sources, see annex, page 335.

Please note that the EU number is not comparable to what was communicated in previous years, as only the countries that were a member of the EU in 2021 were included. Furthermore, data revisions were carried out.

Size of the organic market

Germany remained the largest market in Europe, with a total of 15.3 billion euros, making it the second-largest organic market in the world, following the United States. France held the second position in Europe with 12.1 billion euros in organic retail sales. When comparing organic markets on a global scale, the United States took the lead. It accounted for 43 percent of global organic retail sales, totalling 48.6 billion euros, followed by the European Union at 45.1 billion euros, representing 34 percent of the global organic market. It's worth noting that the EU's share of the global market decreased compared to previous years, partly due to the strengthening of the US dollar against the euro.

In terms of retail sales by continent, Europe accounted for 39 percent (53.1 billion euros), while North America constituted 48 percent (54.3 billion euros). Once again, it's important to consider the fluctuating euro – US dollar exchange rate when comparing data over different years.

Organic retail sales shares

The organic share of retail sales shows the importance of the organic market in a given country. As in the past, the highest market shares were reached in Denmark (12 percent, the highest organic market share in the world), Austria (11.5 percent) and Switzerland (11.2 percent). Market shares of individual products and product groups can be far higher; these data are provided in the table at the end of this chapter.

Growth of the organic market

In 2022, organic retail sales in Europe reached 53.1 billion euros (45.1 billion euros in the EU), marking a decline of 2.2 percent in Europe and 2.8 percent in the European Union. This marked the first decrease in organic retail sales in Europe and the European Union since records began in 2000. However, in some countries, such as Estonia (+6 percent), the Netherlands (+4.4 percent), and Austria (+4.1 percent), retail sales increased in 2022. From 2013 to 2022, the values of Europe's and the EU's organic retail sales more than doubled.

Per capita consumption of organic food

Like in previous years, Switzerland (437 euros) and Denmark (365 euros) maintained the highest per capita consumption of organic food in Europe. Switzerland holds the top position globally for per capita consumption. In 2022, a total of seven countries recorded per capita consumption exceeding 100 euros. The continuous growth in consumer interest is evident through the development of per capita consumption, although there was a notable drop in 2022. Per capita consumption in Europe amounted to 64 euros, while it reached 102 euros in the EU.

Comparison of organic products and product groups with the total market

While the organic share of the total market is an important indicator, it's also crucial to consider the organic market shares that individual products can achieve. In many countries, organic eggs stand out as a success story within the overall retail market, often reaching impressive proportions of the entire egg market. For example, in Denmark and Switzerland, organic eggs have captured more than 30 percent of the market share in terms of value. When looking at product groups, vegetables and fruits consistently attain the highest market shares, with more than 10 percent in many countries (Table 26).

Marketing channels in organic agriculture

Some countries can break down their retail sales data by marketing channel. Catering sales/food service are a separate category and not included in the retail sales data.

Figure 22 shows that the importance of various retail marketing channels (excluding food service/catering) varies from country to country. The strongest growth in the 2018-2022 period was observed in general retailers (including discounters). However, retail sales also decreased for general retailers in some countries, while discounters increased in most cases (where data is available).

Food service

A notable trend is the considerably stronger growth of organic catering sales compared to retail sales in several countries during 2022. Given that 2021 was still influenced by the impact of the pandemic, it is more instructive to examine the comparison between 2019 and 2022. For instance, in Denmark, organic catering sales surged by 18 percent from 2019 to 2022, surpassing the 9.2 percent increase in retail sales during the same period (Figure 89). While data on organic catering/food service sales are limited in many countries, the trend observed in Denmark is indicative of a broader pattern observed in other countries as well, such as France or the UK.

Europe: Organic retail sales by country 2022

Source: FiBL survey 2024

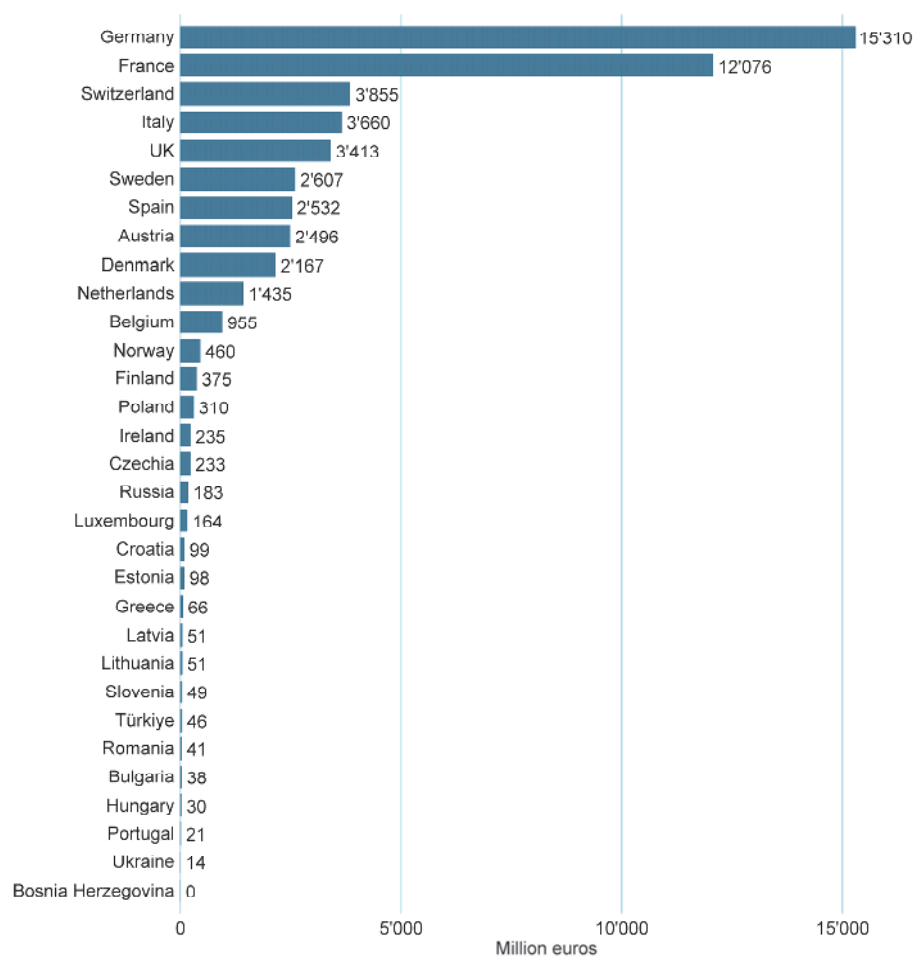


Figure 81: Europe: Retail sales by country 2022

Source: FiBL-AMI survey 2024 based on national data sources. Please note that 2022 data were not available for all countries. For detailed data sources, see annex, page 335.

Europe: Distribution of retail sales by country 2022

Source: FiBL-AMI survey 2024



World: Retail sales by single market 2022

Source: FiBL-AMI survey 2024

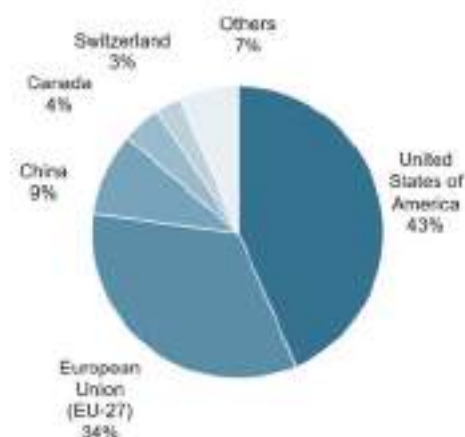


Figure 82: Europe: Distribution of retail sales by country and by single market worldwide 2022

Source: FiBL-AMI survey 2024 based on national data sources

Europe: The countries with the highest shares of the total retail sales 2021 and 2022

Source: FiBL-AMI survey 2024

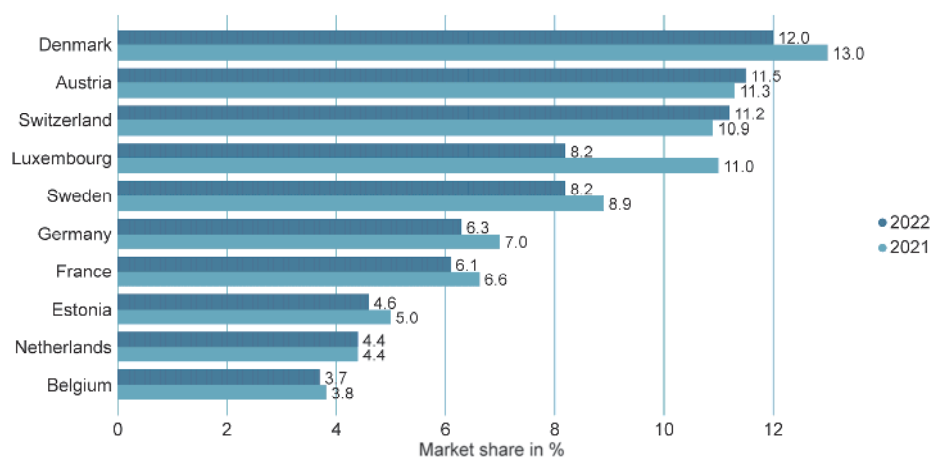


Figure 83: Europe: The countries with the highest shares of total retail sales 2021 and 2022

Source: FiBL-AMI survey 2024 based on national data sources. For detailed data sources, see annex, page 335.

Europe and the European Union: Growth of organic retail sales 2000 - 2022

Source: FiBL-AMI surveys 2001-2023

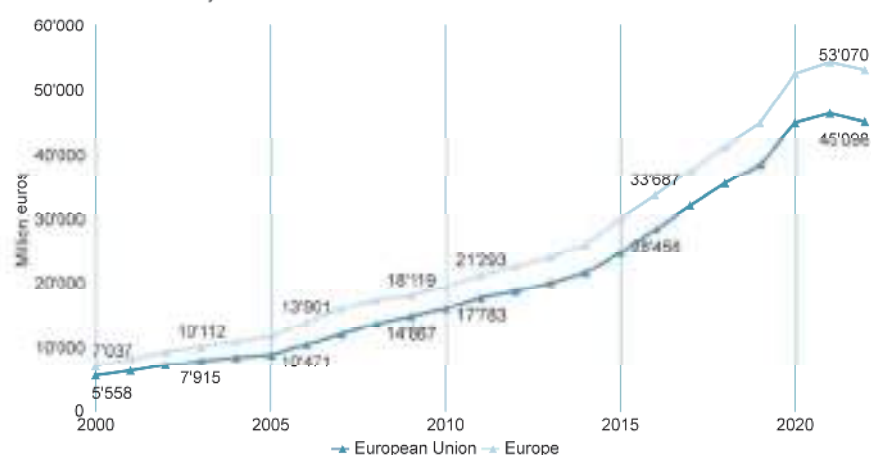


Figure 84: Growth of organic retail sales in Europe and the European Union, 2000-2022

Source: FiBL-AMI surveys 2004-2024, and OrganicDataNetwork Surveys 2013-2015

Development of organic retail sales 2022

Source: FiBL-AMI survey 2024

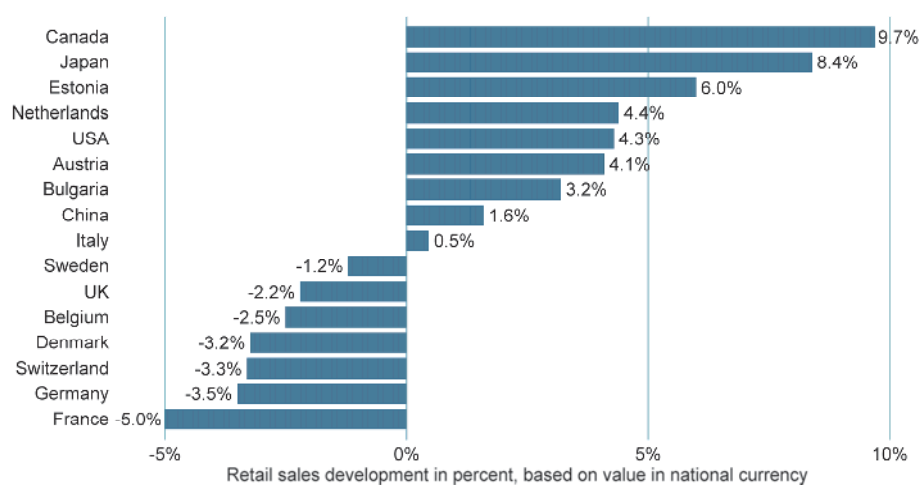


Figure 85: Organic retail sales development in select countries 2022

Source: FiBL-AMI surveys 2024. For detailed data sources, see annex, page 335.

Europe: The countries with the highest per capita consumption 2022

Source: FiBL-AMI survey 2024

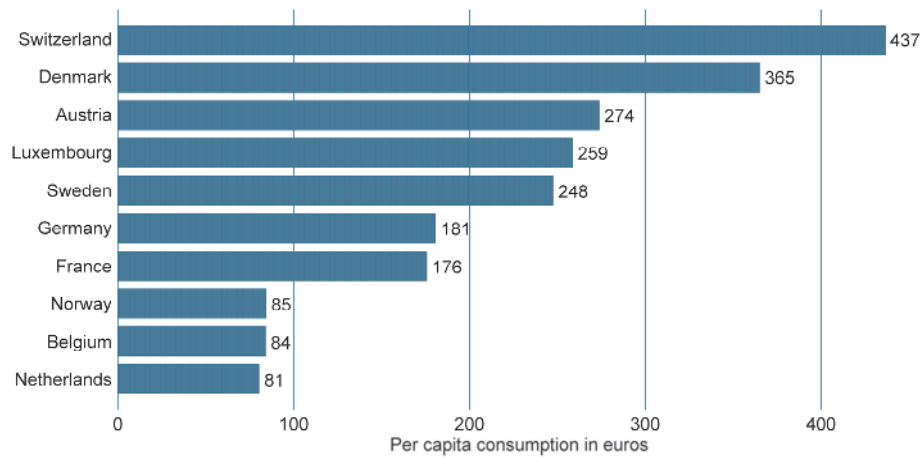


Figure 86: Europe: The countries with the highest per capita consumption 2022

Source: FiBL-AMI survey 2024 based on national data sources. For detailed data sources, see annex, page 335.

Europe and European Union: Growth of the per capita consumption 2009-2022

Source: FiBL-AMI surveys 2006-2024

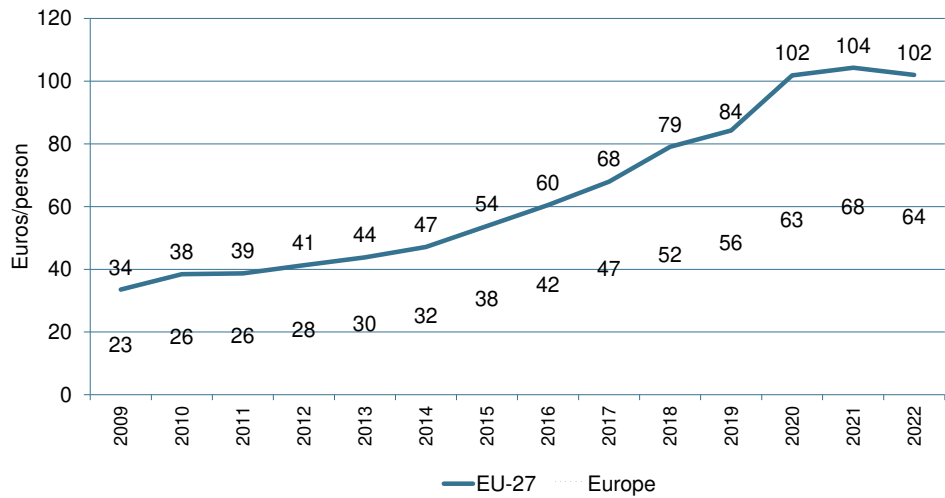


Figure 87: Europe: Growth of the per capita consumption 2009-2022

Source: FiBL-AMI survey 2024 based on national data sources. Calculation based on Eurostat population data. For detailed data sources, see annex.

Europe: Marketing channels for organic products in selected countries 2022

Source: FiBL-AMI survey 2024

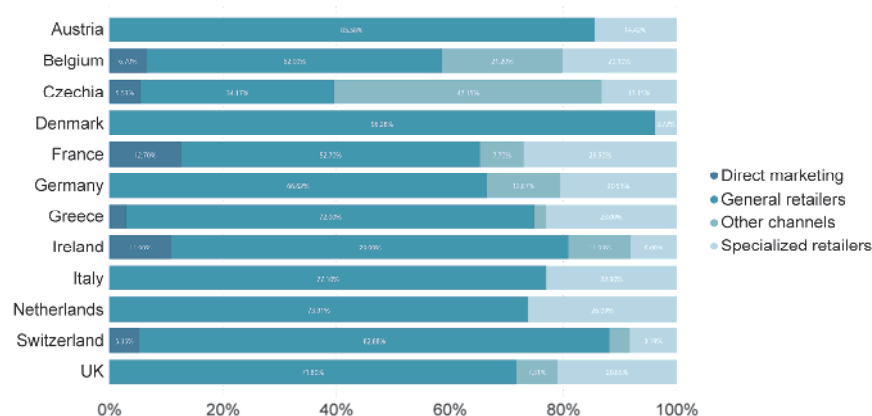


Figure 88: Europe: Marketing channels for organic products in selected countries 2022

Source: FiBL-AMI survey 2022 based on national data sources.

For detailed data sources, see annex, page 335.

Development of food service in Denmark (in Danish Crowns)

Source: Statistics Denmark

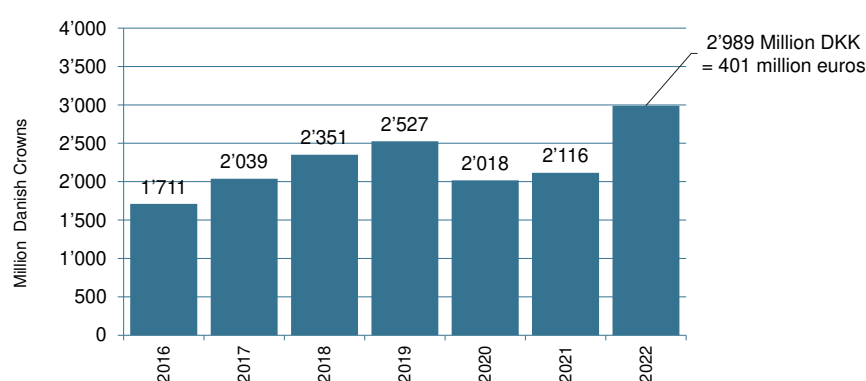


Figure 89: Denmark: Growth of organic food service

Source: Statistics Denmark

Table 26: Organic shares (%) for retail sales values (euros) for selected products 2022

	Austria	Belgium	Czech Republic (2021)	Denmark	Finland	Germany	Netherlands	Sweden	Switzerland	UK
Baby food					23.0			24.5		64.5
Beverages			0.4	19.3 (juice)					4.5	
Bread & bakery products		5.3 (bread)	0.8	6.5 (rye bread)		7.1 (bread)	1.7	0.7 (bread)	26.3 (bread)	0.2
Eggs	20.0	19.28		44.4	16.0	22.9	18.9	19.4	29.6	8.8
Fish and fish products							1.4			1.6
Fresh vegetables	22.7	8.1			3.0	13.7			24.7	5.2
Fruit	15.9	6.4			6.0	9.3			20.1	3.2
Vegetables and fruit			2.2				6.4		21.6	0.5
Meat/meat products	7.1 (meat)	3.4 (meat)	0.4	10.4 (beef)		8.4 (beef)	4.4	6.2 (beef)	6.5 (incl. fish)	1.7
Milk and dairy products	13.5	4.1	1.8				5.3		11.7	3.9
- Butter	11.0					5.7				
- Cheese	10.7	3.0				5.6		1.8	9.2	0.9
- Milk	29.5	3.3		36.6	4.0	15.6		12.2	25.0	5.3
- Yoghurt	26.4					10.7			11.7	8.5
Organic share of total food market	11.5	3.7		12.0%	2.2	6.3	3.3	8.2	11.2	1.8

Sources: FIBL-AMI survey 2024, based on data from Austria: RollAMA based on GfK, Belgium: Biowallonie; Czech Republic: UZEI; Denmark: Organic Denmark based on Kauzas Household panels, provided by Danish Agriculture & Food Council (please note that the data source has changed and a direct year-to-year comparison is not possible), Finland: Pro Luomu; France: Agence Bio.; Germany: Agricultural Market Information Company AMI based on GfK; Italy: supermarkets and discounters only, data provided by Marche Polytechnic University, Netherlands: Bionext; Sweden: Organic Sweden and Ekologiska Lantbrukarna; Switzerland: Bio Suisse based on Nielsen; UK: Soil Association Certification/ NIQ.

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.

Outlook

In 2022, while the organic farmland and the number of organic producers continued to grow, albeit at a moderate pace, there was a decline in organic retail sales and organic imports to the EU. This shift marked a departure from previous years, largely influenced by the onset of the war in Ukraine.

Despite the enduring awareness of organic, environmental, and health concerns, economic challenges took centre stage. Decreasing incomes and escalating prices of various consumer goods, including energy, led some population segments to reduce their purchases of organic products. Others sought more affordable options. An interesting reflection of this trend can be seen in Germany, where robust growth rates of organic products persisted in discount stores, despite notable price hikes in these outlets.

Looking ahead, 2023 also presented its share of challenges for the organic sector, although preliminary data available at the time of writing indicated some markets showing signs of recovery.

To meet the EU Farm to Fork target of achieving 25 percent organic farmland in Europe by 2030, it becomes increasingly evident that timely and appropriate support measures are essential.

Acknowledgements

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Furthermore, the data collection builds on that of the OrganicDataNetwork ("Data network for better European organic market information") project, which was funded by the European Union (EU) under its seventh framework programme for research, demonstration, and technological development (Grant agreement no 289376).

The authors would like to thank all of those who have provided data and information for this report.

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EU imports of organic agri-food products - Key developments in 2022

Summary of the European Commission's Analytical Brief N° 2 EU Organic Imports 2022¹

This article summarises the Analytical Brief No 2 "EU imports of organic agri-food products - Key developments in 2022" published by the European Commission, DG Agriculture and Rural Development. It provides data on EU imports of organic agri-food products in 2022 and highlights key developments compared to 2021. The data on import volumes of organic products come from the Commission's online management tool TRACES (TRAdE Control and Expert System). Import data are summarised by origin and destination and by product class and category.

For detailed data on the EU imports of organic agri-food products in 2022, please refer to the tables provided in the Annex, section 2.3 Organic Agriculture in Europe and the European Union: Tables, page 317.

Volumes of imported organic products down by 5.1% in 2022

- Total imports of organic agri-food products in the EU declined from 2.87 million metric tons in 2021 to 2.73 million metric tons in 2022, marking a 5.1% decrease. This decline may be linked to reduced demand, likely stemming from a significant rise in food prices during the year
- The decrease was mainly driven by reduced imports of fruit and vegetables, sugar, olive and palm oils, sunflower seed, and pet food, with increased imports of organic soybeans, oilcakes, citrus fruit, rice, and honey failing to offset these losses.

Primary products account for almost 90% of EU organic imports

- In terms of organic imports, the European Union plays a significant role as a major importer of commodities and other primary products.² The proportion of these product groups in organic imports stood at 89 percent, which was higher than their share in total agricultural imports (organic and conventional combined), which accounted for 83 percent.

¹EC (2023), EU imports of organic agri-food products, Key developments in 2022, July 2023. European Commission, DG Agriculture and Rural Development, Brussels. Available at

https://agriculture.ec.europa.eu/system/files/2023-07/analytical-brief-2-eu-organic-imports-2022_en.pdf

² Product category "Commodities" includes, among others: cereals, vegetable oils and oilseeds, sugars, milk powders and butter, unroasted coffee and cocoa. "Other primary" includes meat products, F&V, milk yoghurt and honey. "Processed" includes cheese, meat preparations, wine and fruit juices. "Food preparations" includes infant food, confectionary and pasta. "Beverages" includes beers, spirits and soft drinks. "Non-edible" includes plants and essential oils. Moreover, in its scope, the organic regulation also covers products of other sectors, which are reported under "Fish and other non-agri".

- A noteworthy surge of 51% was observed in the import of soybeans in 2022. The majority of these soybean imports originated from Togo, constituting a 63% share, followed by Ukraine at 16% and Benin at 7%. Additionally, ethanol imports experienced a substantial increase, soaring by 210%. These ethanol imports were primarily sourced from Colombia, contributing to an 82% share, with Brazil accounting for 15%.
- Overall, imports of commodities in terms of volume registered a slight decrease of 1.3%, totalling 1.25 million metric tons. This decline can be attributed mainly to a diminishing supply of sugar from India and Costa Rica, as well as wheat from Türkiye.
- On the other hand, imports of other primary products in terms of volume recorded a more significant decrease, declining by 6.0% to reach 1.18 million metric tons. The prominent factor driving this decrease was a 3.4% reduction in tropical fruit imports, which amounted to 872'000 metric tons. Bananas, the most commonly imported tropical fruit, saw their imports decrease by 2.0% to 706'000 metric tons.

Imports of higher value products have also decreased

- Imports of processed products, primarily encompassing juices and olive oil, witnessed a notable drop of 7.4%, with the volume falling to 197'000 metric tons.
- Imports of food preparations experienced a substantial decline of 36%, reducing the volume to 63'000 metric tons. This decrease can be primarily attributed to a significant reduction in pet food imports from the UK, plummeting by 67.5% to 12,400 metric tons.
- In the case of beverages, imports decreased from 3'700 metric tons to 2'600 metric tons, marking a notable decline of 29.1%.

Olive oil remains the product with the highest organic import share

- Out of the 178'000 metric tons of olive oil imported into the EU in 2022, 37'000 metric tons, equivalent to 20.7%, were organic. These organic olive oil imports were almost exclusively sourced from Tunisia. It's worth noting that this share was lower than that in 2021 (24 percent). The decrease in organic olive oil imports was substantial, showing an 18 percent decline, while non-organic olive oil imports remained stable.
- Among the other products with a notable organic share in 2022 were miscellaneous seeds at 10.9%, tropical fruit at 10.2%, honey at 9.2%, and sugar at 6.6%. However, most of these products also experienced reductions in their share of the total import volume.

Ukraine enters the top 3 of the most important origins of organic imports

- Ecuador and the Dominican Republic continue to lead as the primary exporters of organic products to the EU, largely due to substantial exports of organic bananas. While banana imports from the Dominican Republic and Peru experienced minor

declines of 3 percent and 21 percent, respectively, these losses were predominantly offset by a substantial 41% surge in imports from Colombia.

- In 2022, Ukraine emerged as the third most important supplier of organic products to the EU, primarily driven by increased shipments of organic soybeans, wheat, and maize. Quantity that used to be transported by sea (to the US mainly), which was blocked due to the war, arrived in Europe by barge and overland.
- Imports from China rebounded significantly, recording a 30% increase from a sharp decline in 2021, mainly attributed to a doubling in oilcake imports (Figure 90). Routes closed during the pandemic were re-opened again.
- On the other hand, the fastest-growing supplier among the main contributors was Togo, with an impressive 84% growth, primarily due to soybean imports. Conversely, significant decreases in organic imports were observed for India due to the revocation of two inspection bodies by the EU (-32%, primarily in oilcake, soybeans, and sugar), Turkey (-33%, mainly in fruits and vegetables and wheat), and notably the United Kingdom (-51%), which fell out of the list of top-10 suppliers, largely driven by declines in preparations for pet food, sunflower seed, and oilcake imports.

A significant proportion of EU organic imports, totalling 53 percent, found their way to the Netherlands and Germany

- The Netherlands welcomed nearly 1 million metric tons of total EU organic imports, marking a 4.6 percent increase compared to 2021. In contrast, Germany received almost half a million metric tons, experiencing a modest decline of 13.1 percent. Together, these two EU member states accounted for the lion's share of 2022's EU imported organic products (Figure 91).
- Most other EU importers reported declines in their organic imports. This was particularly notable in Ireland, where imports decreased by 33% to 56'000 metric tons, primarily due to reduced pet food imports from the UK. Similarly, Italy saw a 21% decrease to 178'000 metric tons, attributed to fewer wheat and oilcake imports, while Sweden experienced a 16% reduction to 153'000 metric tons, primarily due to decreased banana imports.
- Conversely, Austria witnessed a substantial 45% increase in imports, reaching 51'000 metric tons, driven by higher imports of oilseeds from Ukraine and Togo. Notably, Latvia's imports surged by a remarkable 22-fold increase to 9'000 metric tons, primarily fuelled by new oilcake and soybean imports from Kazakhstan.

European Union: The ten countries with the largest export volumes to the European Union 2021 and 2022

Source: Traces/European Commission 2022

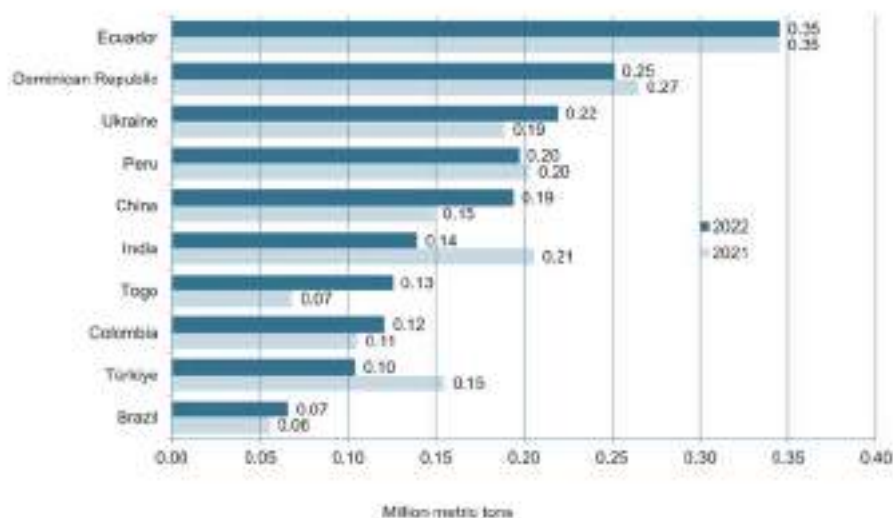


Figure 90: EU organic imports by exporting country 2021 and 2022 compared

Source: European Commission/TRACES 2023

European Union: EU imports by county 2021 and 2022

Source: Traces/European Commission 2022

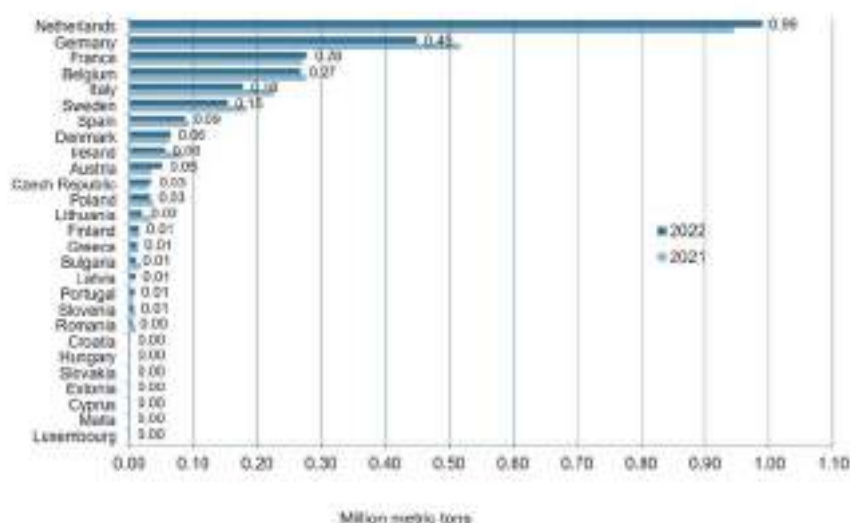


Figure 91: European Union: The largest importers 2021 and 2022

Source: European Commission/TRACES 2023

European Union: The largest import volumes by crop/product to the European Union 2021 and 2022

Source: Traces/European Commission 2022

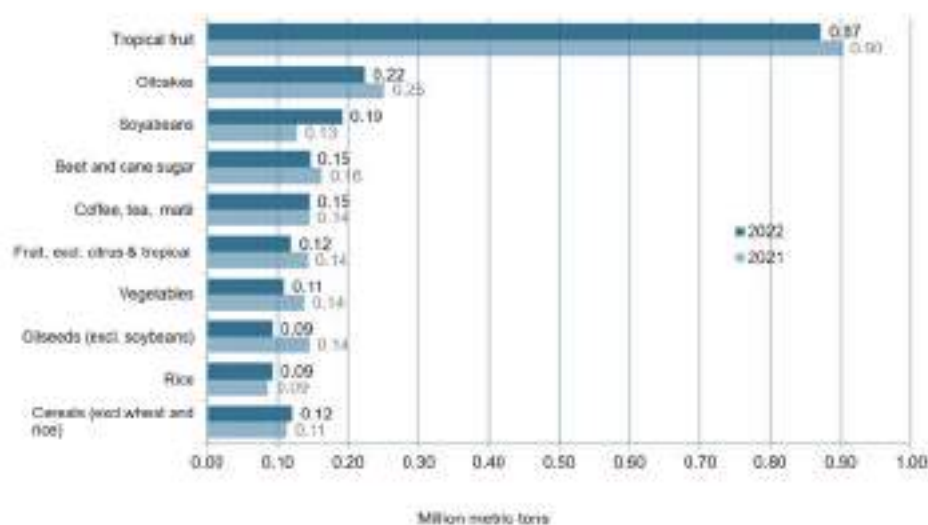


Figure 92: EU Organic imports by product 2021 and 2022 compared

Source: European Commission/TRACES 2023

European Union: Organic agri-food imports development 2018 - 2022

Source: Traces/European Commission 2023

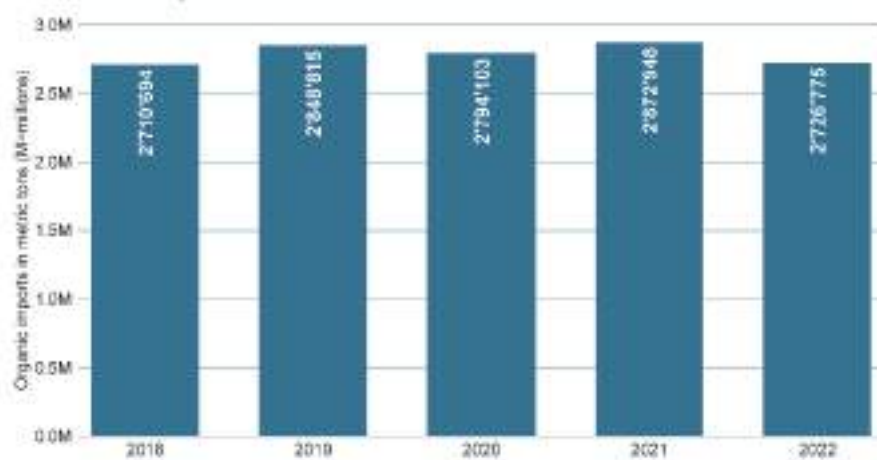


Figure 93: EU Organic imports: Development

Source: European Commission/TRACES 2023

Latin America and the Caribbean



Map 5: Organic agricultural land in the countries of Latin America and the Caribbean 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Organic agriculture in Latin America 2023

GABRIELA SOTO¹

Changes in the European Union organic regulation and the US National Organic Programme

During 2023 one of the main challenges facing organic production in Latin America and the Caribbean were the changes in regulations for our main export markets, the European Union and the United States.

Operators in exporting countries with diverse markets must comply with several organic regulations. In this scenario, a producer in Costa Rica has more restrictions on producing organically than a producer in the US, both selling in the US market. Since access to different markets is a strategy to reduce risks, producers in Latin America try to comply with all regulations just in case a window opens to sell in Europe, Japan, Korea, or the US. So, although the changes in one of those regulations can happen every five years, all these added changes can create fatigue among producers. Regulation changes are essential, but we should also consider the impact on the sector, mainly if the changes occur too frequently.

As a Nicaraguan coffee producer once said during an inspection when I explained a regulation change, “You tie my hands tighter each time you come, and then ask me to farm with both hands”.

Changes in the grower group certification requirements

One of the main changes is the grower group certification requirements. Although grower group regulation has been included in national regulations in the region since 2000 (Costa Rica, Nicaragua, Honduras, Guatemala, México, Colombia, Ecuador, Perú), this is the first time it has been included as part of the US and EU regulations. Most of the requirements recently added were already in place in the national regulations in the region for several years, such as having an Internal Control System (ICS), mandatory traceability, and even mass balance exercises.

The Strengthening Organic Enforcement (SOE)/National Organic Programme (NOP) regulation² added a few new elements for grower groups from the 2002

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² Strengthening Organic Enforcement (SOE), the largest update to the United States Department of Agriculture organic regulations since 2002, will go into effect on March 19, 2024. The comprehensive update will impact all aspects of the organic supply chain, with handlers and processors experiencing the most significant changes. New SOE rules will require almost all handlers and processors of organic products to obtain organic certification to continue using the USDA Organic Seal on their products. This is a marked change from previous organic regulations which included little oversight for this segment of the organic industry. More information is available at the website of the OCIA: <https://ocia.org/2023/10/27/faq-strengthening-organic-enforcement/>

recommendation of the US National Organic Standard Board (NOSB), and the general feeling is that it will not affect the sector already in compliance with national regulations. However, the changes included in the EU regulation, especially in the definition of a grower group (2018/848 Art. 36.1 (d) - having legal personality), and the clarification in the Frequently Asked Questions of 2023¹ are already negatively impacting the organic sector.

As an example of how this affects grower groups in real life, let's review the case of two cooperatives in Costa Rica: sugar cane and coffee. In Costa Rica, there has been a huge time and resource investment in education, training, and convincing large coffee and sugar cooperatives to embrace and promote organic farming. Around five years ago, large cooperatives finally decided to organize small groups of operators or grower groups of 40 to 50 organic producers. The impact on the cooperatives was rapidly felt, and the extension agents of the cooperative had to prepare themselves for alternative disease and plant nutrition management. These new strategies were also explained to conventional farmers, who started implementing more sustainable farming practices. Even a small group of organic farmers can improve the management practices of conventional producers. However, in 2023, two cooperatives were informed of the change in the EU organic regulation by the Costa Rican government, and in both cases, they stopped organic certification and closed the organic groups.

We must understand that creating a new legal entity is not an easy task; the cooperative needs to explain this change to the members. This is usually done in the General Assembly, where a vote is needed to split the organization to create a new legal entity; the new legal entity must register as a separate entity to pay taxes, health permits, and local government permits. Then the cooperative must have two General Assemblies, one for each legal entity. All this requires a lot of time and resources. The list of additional costs and permits can be a long one. The amount of work required to become a separate legal entity is considerable. In the case of the sugar and coffee cooperatives, they decided it was not worth it, and as a result, they disbanded the organic groups.

Two other examples include an association of producers in the Indigenous region of Costa Rica, which has been in existence for 30 years and is primarily composed of members from the Bribri and Cabecar indigenous ethnic groups. They grow their bananas and cocoa organically, although the word record-keeping or certification does not exist in their language. They have been certified organic since 1995, so those words are now commonly used. The recent change in regulations forced them to split their organization. Only a few members are conventional producers, primarily because they cannot obtain organic certification due to their farms' proximity to large conventional banana plantations or because seasonal floods from the rivers that cross those plantations affect their land.

¹ European Commission (2023): Frequently asked questions on organic rules. The website of the European Commission. Available at https://agriculture.ec.europa.eu/system/files/2023-11/organic-rules-faqs_en.pdf

They organized a General Assembly and tried to explain this new requirement to the producers. The impact was as expected: the vast majority did not understand the situation, leading to the removal of the president and the organization's board, along with everyone from the ICS. The crisis created has been extremely debilitating to the organization. Having indigenous producers' associations capable of international marketing was a significant success resulting from substantial investment. The current situation, approaching a breaking point, is devastating for everyone involved.

The most recent experience involved a large cooperative that cultivated multiple crops, including pineapple, bananas, coffee, and ginger. In this case, the number of organic producers exceeded the number of conventional farmers, prompting a division into two separate groups. The estimated cost of all the processes, according to the general manager, amounted to 20'000 US dollars (approximately 19'000 euros), which nearly pushed the organization into bankruptcy.

Were any of these consequences considered with the changes in the EU regulation?

All these examples from Costa Rica, where the requirement to have a separate legal entity for organic grower groups was implemented in 2023, indicate that the impact of this norm is extremely negative, not just for organic production but for the well-being of the farmers. Hence, it is safe to assume that this new EU organic regulation will disincentivize organic production around the world.

International agreements in the organic sector

In February 2023, Canada and Mexico signed a Memorandum of Understanding (MoU) to recognize each other's organic regulations as equivalent. The MoU includes plant products, processed food, livestock, and livestock products.

Argentina and Costa Rica are re-negotiating the Third Country agreement with the EU; this status will expire in December 2026. At the latest Interamerican Commission for Organic Farming (CIAO) conference, Argentina informed that they are writing the Grower Group definition and requirements to comply with the 2018/848 EU Regulation.

The balance of the third-country agreement is perceived as positive for the image of the organic sector in each country and the cost of accreditation for local certification agencies. However, areas of improvement should be considered in the new agreement. For example, since 2002, in Costa Rica, importing organic products to be sold in Costa Rica has been prohibited due to the agreement with the EU. The national organic industry has been slowed down because of this requirement. A similar situation has been observed in Argentina.

VIX Interamerican Commission Organic Farming Conference

The conference of all competent authorities in organic production in the Americas occurred in the Dominican Republic in October 2023, with the participation of Spain, Canada, and the United States, plus organizations such as Agrobio from Portugal. Some common concerns mentioned by the Director of CIAO, Rommel Betancourt, include the

potential of the new EU organic regulation to dismantle the significant achievements of producer organizations by breaking them up, the absence of helpful research for organic production, and the advantages that the CIAO organization has in negotiating as a group.

The block negotiation strategy has proven beneficial in addressing certain issues, such as those related to the EU risk list. This list encompasses various products, including citrus and coffee, and involves multiple countries. The strategy's aim is to enhance transparency throughout the process.

Expected reduction in organic production in the region

In 2023, the general feeling from several certification bodies consulted for this article is that the impact of the EU regulation on grower groups will be evident. Many groups will stop EU certification, concentrate on the US market, or leave the organic sector altogether.

The organic sector has benefited from its strict control over the years. But it is very important that the control strategy is intelligent enough so that it does not impede the development, not only of the organic sector itself but also of rural communities around the world.

Acknowledgements

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The Inter-American Commission on Organic Agriculture

Gabriela Lacaze and Juan Manuel Gámez¹

The Inter-American Commission on Organic Agriculture (ICOA - CIAO, by its acronym in Spanish) is a specialized body created by the Ministers of Agriculture of the Americas through the Inter-American Institute for Cooperation on Agriculture (IICA). Its mission is to promote the production and trade of organic products in the Americas. Established with the purpose of strengthening organic agriculture in the region, the CIAO has become a fundamental pillar for cooperation between member countries and the main players in the organic sector at the international level.

CIAO plays an essential role in promoting and strengthening organic agriculture in the Americas. Its main activities include promoting the production, processing, marketing, and consumption of organic products in the region, aiming to raise awareness among producers and consumers about their benefits. Additionally, it works on the harmonization of regulations between countries to ensure consistent quality standards and facilitate trade. The CIAO is also dedicated to training and technical assistance, organizing workshops and seminars to train key players in the organic production chain, and providing technical support to improve production and certification systems. It acts as a forum for exchanging experiences and knowledge between countries and seeks alliances with international organizations to strengthen the global position of organic agriculture.

The CIAO is composed of the Competent Authorities for Control and Promotion, which are the representatives of the member countries from 19 countries of the Americas, ensuring active and equitable participation in decision-making. This democratic structure allows all countries, regardless of their size or level of development, to have a voice and vote in defining policies and actions. Spain and Portugal also make up the CIAO as Permanent Observer Members. Additionally, the CIAO maintains numerous Cooperation Agreements with the main players in the organic sector at the international level, including FiBL and IFOAM.

The Inter-American Commission on Organic Agriculture is an essential body for the development and promotion of organic agriculture in the Americas. Through its various functions and activities, the CIAO seeks to ensure that the production and trade of organic products are carried out sustainably, equitably, and in an environmentally friendly manner. Its work is a testament to the commitment of the region's countries to a greener and more sustainable future.

¹ Gabriela Lacaze and Juan Manuel Gámez, Inter-American Commission on Organic Agriculture (CIAO), Buenos Aires, Argentina, www.ciaorganico.net

Memorandum with FiBL on data collection

In 2019, FiBL and CIAO signed a Memorandum of Understanding covering their respective mandates related to data tools, methods, and analyses for global organic agriculture monitoring and product dissemination. This agreement includes the exchange of information on global organic agriculture statistics principles.

This partnership ensures that information from CIAO member countries, published in FiBL yearbooks, is recognized as official data endorsed by organic agriculture control authorities. CIAO countries consider FiBL's work as the sole global reference for collecting, systematizing, analyzing, and publishing standardized global organic production data. They highly value this information as a fundamental resource for their work within each country and express high satisfaction in contributing to FiBL's annual data collection

Latin America and the Caribbean: Key Facts and Figures

JAN TRÁVNÍČEK,¹ BERNHARD SCHLATTER² AND HELGA WILLER³

More than 9.5 million hectares of farmland in Latin America and the Caribbean were organic in 2022 – Argentina had the largest area

In Latin America and the Caribbean, more than 9.5 million hectares were managed organically in 2022. Almost 10 percent of the world's organic farmland was in Latin America and the Caribbean.

With almost 4.1 million hectares, Argentina had the largest farmland area under organic management, followed by Uruguay (more than 2.7 million hectares), Brazil (almost 1.0 million hectares) and Mexico (over 0.4 million hectares). More than 86 percent of Latin America and the Caribbean's organic farmland was in these four countries.

Uruguay is the country with the highest organic area share in Latin America and the Caribbean

Organic farmland in Latin America and the Caribbean constituted 1.3 percent of the total agricultural land of the continent and was thus below the global organic area share of 2.0 percent in 2022.

The country with the highest organic area share was Uruguay, with a share of 19.6 percent, followed by Dominica (11.6 percent) and French Guyana (11.1 percent).

In Latin America and the Caribbean, organic farmland decreased by more than 67'000 hectares

Organic land increased by nearly 53'000 hectares (+0.6 percent) in Latin America and the Caribbean. In the decade 2013 to 2022, organic farmland grew by 42 percent and thus at a much slower rate than global organic farmland.

Key crops grown are coffee, cocoa and cereals

Only 6.3 percent of organic farmland in Latin America and the Caribbean is used for arable crops (604'459 hectares). Among the key crops were cereals (143'711 hectares, mainly in Bolivia), sugarcane (91'553 hectares, mainly in Paraguay and Argentina) and oilseeds (57'038 hectares, mainly in Bolivia).

Permanent crops accounted for approximately 10.7 percent of total organic land in Latin America and the Caribbean in 2021. Among the key crops were coffee (421'965 hectares), mainly in Peru, Mexico and Colombia; cocoa (200'760 hectares), mainly in the

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² Bernhard Schlatter, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

³ Helga Willer, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

Dominican Republic and Peru; and tropical and subtropical fruit (102'446 hectares), mainly in the Mexico, Ecuador, Dominican Republic and Peru.

Almost 75 percent of Latin America and Caribbean organic farmland is permanent grassland (7'120'297), and it is located mainly in Argentina, Uruguay and Brazil. These three countries represent 97.2 percent of the total organic grassland/grazing areas in Latin America and the Caribbean.

Organic producers, processors and importers: Increase of producers by more than 18'000 in 2022

There were more than 270'000 organic producers in Latin America and the Caribbean, with the highest number in Peru (107'868). Six percent of the world's organic producers were in Latin America and the Caribbean. Compared to 2021, there were 8'174 less (-2.9 percent down) organic producers, a total of 1'178 exporters and 9'658 processors.

Retail sales: Data almost non-existent in Latin America and in the Caribbean

Organic retail sales data for Latin America and the Caribbean are almost non-existent. However, this does not mean that there is no domestic market for organic products in Latin America. Many countries have developed local markets.

More than 56 percent of the EU and US imports are from Latin America and the Caribbean

Data on organic export volumes in metric tons to the European Union, which is a major market for Latin America and the Caribbean, has been available since 2018. Export data to the US has been available for even longer (since 2014); however, US organic imports data do not cover all products.

Data show that in 2022, nearly 2.8 million metric tons of products were exported from Latin America and the Caribbean to the EU and US, constituting 56.4 percent of all organic exports to these countries/trade blocks. In the 5-year period between 2018 and 2022, Latin America and Caribbean exports increased by more than 25.8 percent, considerably faster than global organic exports to the EU and US, which grew by only 9 percent in the same period.

Ecuador is the largest exporter

The largest Latin American and Caribbean exporter was Ecuador (more than 593'000 metric tons of products, 94 percent being bananas), followed by Mexico (nearly 536'000 metric tons, mainly bananas, vegetables and avocados) and Peru (nearly 344'000 metric tons, mainly bananas and coffee).

Bananas are the most important export product

With more than 1'208'000 metric tons and almost 44 percent of the Latin American and Caribbean organic exports, bananas are the most important product group, followed by sugar (400'467 metric tons) and coffee (187'530 metric tons).

For more information about the Latin American and the Caribbean, see figures following pages and data tables for the region from page 325.

Organic Agriculture in Latin America and the Caribbean: Graphs

Latin America and Caribbean: The ten countries with the largest organic agricultural area 2022

Source: FiBL survey 2024

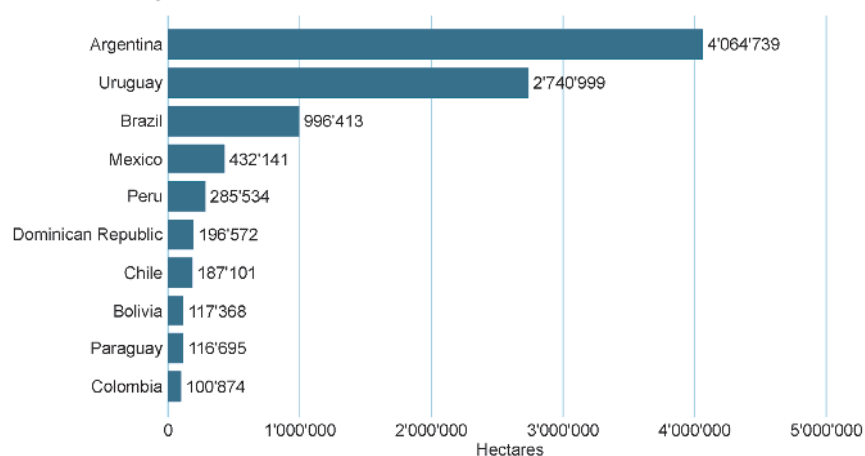


Figure 94: Latin America and the Caribbean: The ten countries with the largest organic agricultural area 2022

Source: CIAO-FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Latin America and Caribbean: The ten countries with the highest organic share of total agricultural land 2022

Source: FiBL survey 2024

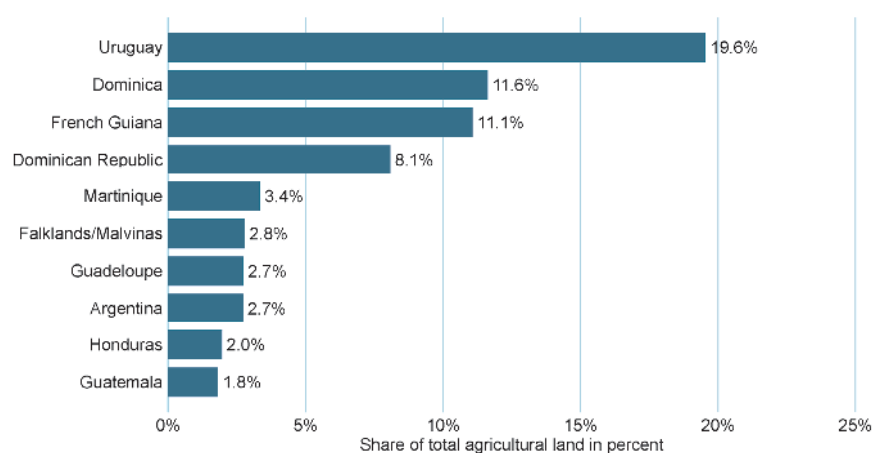


Figure 95: Latin America and the Caribbean: Highest organic area shares 2022

Source: CIAO-FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

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

Source: FiBL-IFOAM-SOEL surveys 2001-2024

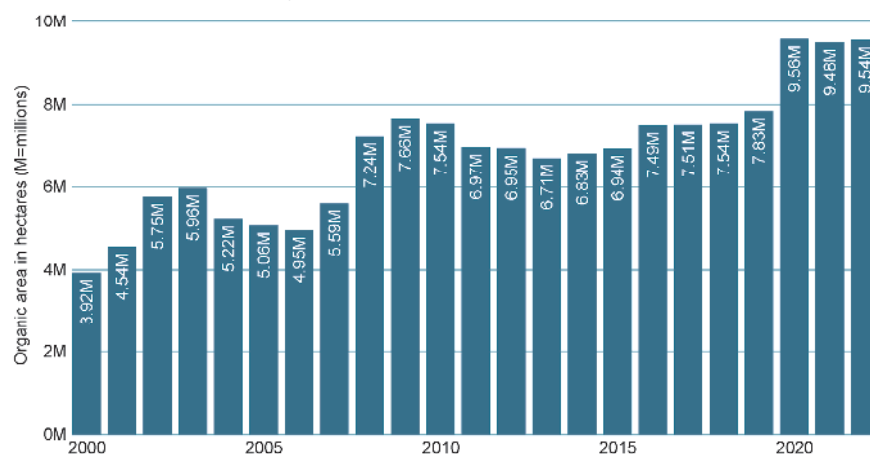


Figure 96: Latin America and the Caribbean: Development of organic agricultural land 2000-2022

Source: CIAO-FiBL-IFOAM-SOEL-surveys 2001-2024

Latin America and Caribbean: Use of organic agricultural land 2022

Source: FiBL survey 2024

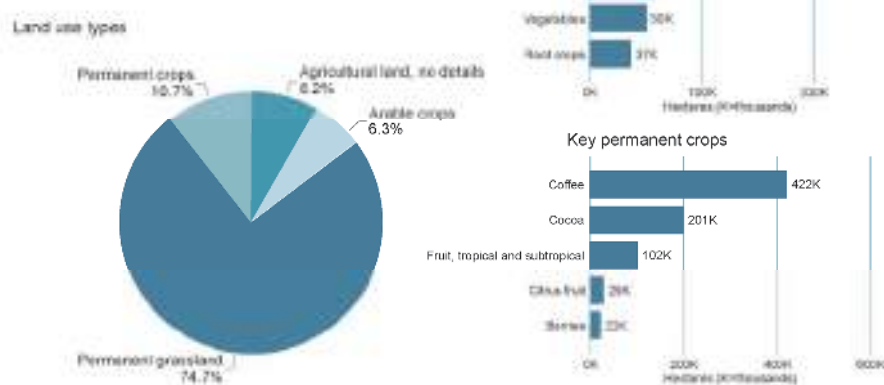


Figure 97: Latin America and the Caribbean: Use of organic agricultural land 2022

Source: CIAO-FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Latin America: Key commodity groups exported to the EU and US in 2022

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

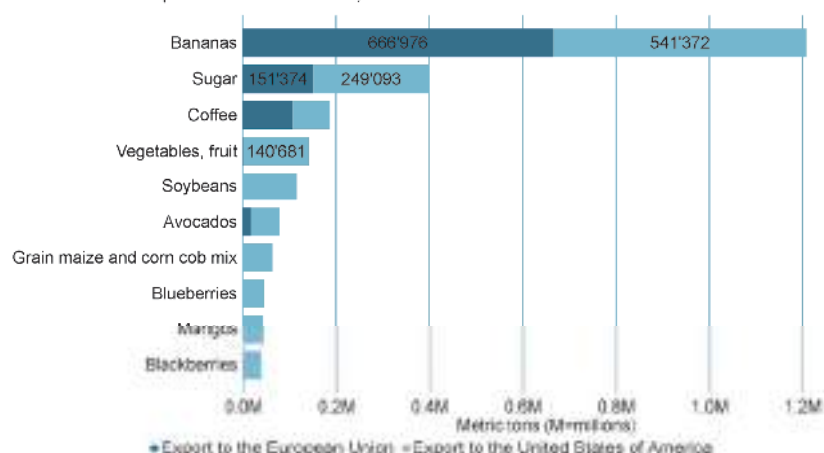


Figure 98: Latin America and the Caribbean: Key commodity groups exported to the EU and US (export volume in MT)

Source: GATS/USDA TRACES/European Commission. For detailed data sources, see annex, page 335.

Latin America: Key EU and US export countries in 2022

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

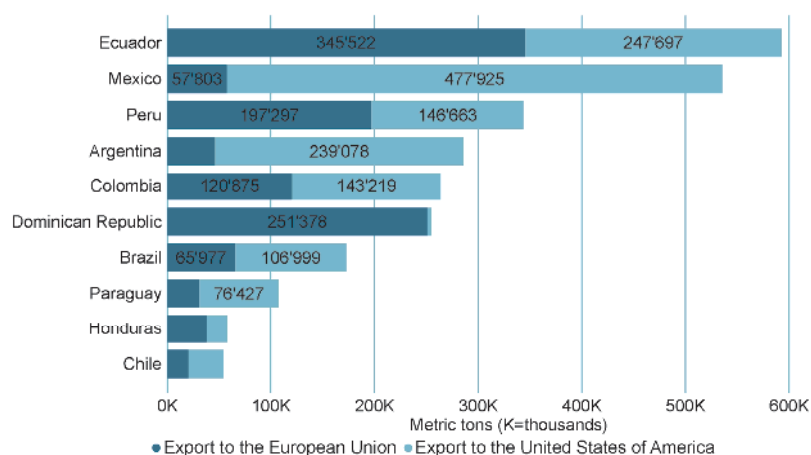


Figure 99: Latin America and the Caribbean: Key countries exporting to the EU and US (export volume in MT)

Source: GATS/USDA TRACES/European Commission. For detailed data sources, see annex, page 335.

North America



Map 6: Organic agricultural land in Canada and the United States 2022

Source: Canada Organic Trade Association (COTA) and United States Department of Agriculture (USDA). For detailed data sources, see annex, page 335.

Long Awaited Achievements for U.S. Organic in 2023

MAGGIE MCNEIL¹

The year 2023 was an eventful year for the U.S. organic sector. Headlining the year were two hard-fought and historic regulatory victories, each of which will strengthen organic standards, solidify the consumer trust in organic and help continue the advancement of organic. In addition, the legislative calendar was busy as the debate over a new Farm Bill intensified and various bills were introduced to support organic. Finally, guided by leadership supportive of organic agriculture and boosted by its Organic Transition Initiative announced in 2022, the U.S. Department of Agriculture put in play or expanded a number of initiatives to help grow organic.

USDA tightens oversight of organic supply chain

Fraud in the organic system – wherever it occurs – harms the entire organic sector and shakes the trust of consumers in organic. On January 18 of 2023, the Agriculture Department announced a broad and encompassing regulation, the Strengthening Organic Enforcement (SOE) rule, to deter and detect organic fraud and protect organic integrity throughout the supply chain.

The historic new regulation (282 pages in length) will have significant and far-reaching impacts on the organic sector and represents the biggest change to organic regulations since the creation of USDA's National Organic Program. The rule closes gaps in current organic regulations and builds consistent certification practices to prevent fraud and improve the transparency and traceability of organic products. The new rule will impact all certified operations and certifiers, as well as many organic supply chain participants who are currently not certified organic. Operations and certifying agents must comply with new requirements by March 19, 2024. This includes currently certified and uncertified operations that are required to become certified as a result of this final rule (e.g., importers, exporters, certain brokers, and traders).

Some specifics on the most significant areas of the rule:

- Requiring more operations in the supply chain to be certified. The rule clarifies that traders, importers, warehouses for unpacked products, distributors and brokers or anyone who handles open organic products at retail needs to be certified organic. Exemptions have been curtailed to retailers; those storing or selling to retail products in sealed, tamper-evident packaging; transport and customs brokers.

¹ Maggie McNeil, Media Relations Director, Organic Trade Association, 444 N Capitol St NW, Washington, DC 20001, United States of America, <https://ota.com/>

- Requiring Import certificates. All organic products imported to the U.S. will now need to be documented via an import certificate issued by the certifier of the exporter that will be entered into the U.S. Custom Agency's commercial trade processing system and the National Organic Program's Organic Integrity Database. This will make tracing, monitoring, auditing, and enforcing the organic rule in international trade more efficient and effective.
- Supply Chain Traceability and Organic Fraud Prevention. The new rule will require more robust traceability and fraud preventative practices at each certified operation – increasing the responsibility for all stakeholders in detecting and rooting out fraud in the supply chain.
- Other areas of the rule: Labeling of Nonretail Containers, On-Site Inspections, Certificates of Organic Operation, Continuation of Certification, Paperwork Submissions to the Administrator, Personnel Training and Qualifications, Oversight of Certification Activities, Accepting Foreign Conformity Assessment Systems, Compliance and Noncompliance Procedures, Mediation, Adverse Action Appeal Process, Producer Group Operations, Calculating the Percentage of Organically Produced Ingredients and Technical Corrections.

Producer group lawsuit

Included in the new rules to address supply chain traceability and organic fraud prevention, SOE clarified the definition of “producer groups,” and set specific eligibility criteria to qualify for group certification. In November, An Oregon hazelnut farmer filed suit against USDA for the certification of producer groups. Producer groups serve as a bridge for smaller farmers to access international markets they would otherwise be excluded from. This system of collective certification not only ensures adherence to rigorous organic standards but also facilitates the sharing of resources and utilization of centralized processing facilities. The Organic Trade Association remains steadfast in its support of producer group certification and the deterrence of fraud within the organic system.

Organic animal welfare standards strengthened

The Department of Agriculture announced on October 25, 2023 its final Organic Livestock and Poultry Standards (OLPS) regulation. The regulation creates clear standards for outdoor access for organic poultry including minimum indoor and outdoor space requirements, and further clarifies living conditions, healthcare, transportation, and slaughter practices to support animal welfare for all organic avian and mammalian livestock species. Most importantly, the rule clarifies that screened-in, enclosed porches do NOT qualify as sufficient outdoor space for organic chickens. Current organic poultry producers have up to five years to implement the new regulations.

This marked a remarkable victory for organic farmers, organic consumers, and, most importantly, organic animals. The National Agricultural Statistics Service (NASS) estimates that at any given moment, there are 72 million animals in the United States

under organic management (2021). They will now all be raised with the same high animal welfare standards that have always been expected from organic practices.

Almost twenty years in the making, the new rules reflect long and persistent advocacy by the organic sector, the Organic Trade Association (OTA) and other organic groups. The road to this final regulation was long, and often bumpy. In 2010, USDA issued a final rule creating clear standards for grazing and access to pasture for organic dairy and cattle, but the poultry sector was left without similar clarifications. USDA released its final Organic Livestock and Poultry Practices (OLPP) regulation, the predecessor to OLPS, in early 2017, after some 14 years of vetting and review by organic stakeholders and industry and government experts. The implementation of that final rule, however, was delayed and blocked, and the rule was ultimately withdrawn.

In the fall of 2017, OTA filed a lawsuit against the USDA for unlawfully delaying the implementation of the regulation and violating the Organic Foods Production Act. Spurred on by the lawsuit and continuing advocacy from the organic sector and the public for stronger animal welfare standards, the current Administration proposed the Organic Livestock and Poultry Standards regulation last August which culminated in the final regulation.

Outdoor access has always been a core tenet for organic poultry and livestock production, but USDA organic regulations regarding outdoor access have not been consistently enforced, nor sufficiently clarified, resulting in some large poultry companies utilizing narrow, enclosed porches – usually with a cement floor – instead of true outdoor access. The result has been an unlevel playing field for all the organic farmers who raise their animals by the highest organic standards. Having clear, consistent and enforceable standards is paramount for the organic sector to maintain consumer trust, and to also ensure that farms and businesses of all sizes have a fair chance at competing in the marketplace by meeting a minimum set of requirements.

Importantly, beyond the specific issue of organic animal welfare, the successful advocacy for this regulation holds the Agriculture Department accountable and responsible for maintaining the integrity of the National Organic Program.

New Farm Bill begins to take shape

Since 1933, the course of American agriculture and nutrition programs has been charted by a landmark piece of legislation known as the Farm Bill. Today's Farm Bill is massive. It is a far cry from the first farm bill in 1933 the Agricultural Adjustment Act that was prompted by a pair of economic catastrophes for all Americans, and particularly for America's farmers: the Great Depression into which the country was plunged after the stock market crash of 1929, and the Dust Bowl, which began in 1931 and hung on for eight years, driving some 3.5 million people off their farms. The goal of the 54-page bill in 1933 was to boost farm income and encourage conservation by paying farmers not to plant some of their land, and by enabling them to take out loans from the government, using their crops as collateral.

In 1938, Congress mandated that legislators update the farm bill every five years, solidifying the law into more permanent legislation. Congress has not always stuck to

the five-year schedule –in fact the 2018 Farm Bill at the time of this writing looks likely to be extended by 1 year– but lawmakers have crafted 16 farm bills since that first one, and the legislation has expanded in scope with every new version. The bill now is considered an “omnibus” legislative package. The nearly 1’000-page legislation sets and authorizes farm and nutrition programs and policy, has 12 separate titles and contains nearly half a trillion U.S. dollars¹ in spending. Around 80 percent of that spending is in nutrition assistance programs, with some 100 billion U.S. dollars spent on farm programs.

Organic became an official part of the Farm Bill with the inclusion of the Organic Foods Production Act in the 1990 Farm Bill, and the U.S. organic industry has flourished under the standards and regulation established by the Farm Bill. A host of programs support organic and the organic market. Fundamental data collection, risk management for organic farmers, resources to uphold the National Organic Program at USDA are just a few examples of why the Farm Bill is critical for the continued advancement of the U.S. organic agriculture.

The organic sector is calling for a new Farm Bill that recognizes the integral role the 67 billion U.S. dollar organic sector plays in today’s American agriculture. Organic is one of the country’s fastest-growing food production and processing categories, but despite the organic sector’s strengths and marketplace success, the industry faces core challenges that Congress must address.

To sustain organic’s growth and expand its positive impacts, the next Farm Bill must support and foster organic agriculture, and several bills have been introduced in Congress with that purpose:

– **Continuous Improvement and Accountability in Organic Standards (CIAO) Act**

Introduced in the House of Representatives, the Continuous Improvement and Accountability in Organic Standards (CIAO) Act establishes a five-year timeline for the NOP to engage in the necessary rulemaking before starting the process over – ensuring standards are fresh and in line with current science and consumer demands. The process starts with a request for information on priorities for the NOP to work on during the five-year cycle. Then the NOP, either utilizing existing recommendations or requesting new ones from the NOSB, moves forward on the update necessary to reflect those priorities and engages in a traditional Administrative Procedures Act process. At the conclusion of the regulatory process and finalization of those updates, the cycle repeats. The process allows for stakeholder input at multiple stages and utilizes the NOSB, permitting stakeholders to have the opportunity to shape any updates or craft new standards in the process. The Organic Trade Association spearheaded the largest organic coalition in recent history to support this bill.

¹ According to the Central European Bank (ECB), 1 U.S. dollar corresponded to 0.94 euros in 2022.

– **Organic Market Development (OMD) Act**

Introduced in the Senate and the House of Representatives, the Organic Market Development (OMD) Act is aimed at leveraging investments in new and expanded organic markets by funding and supporting increased processing capacity, market development activities, targeted equipment purchases, and other activities to increase consumption of domestic organic commodities. Grants under OMD will be structured in three project types, 24-month Simplified Equipment-Only with funding between \$10'000 and \$100'000, and 3-year Market Development and Processing Capacity Expansion with funding ranging between \$100'000 and \$3'000'000. OMD would maintain the 2023 funding base of \$75 million annually through Commodity Credit Corporation funding. Additionally, OMD will allow authorization for additional appropriations of \$15 million for 2024 and each fiscal year thereafter.

– **Strengthening Organic Agriculture Research (SOAR) Act and Organic Science and Research Investment (OSRI) Act**

House bill SOAR increases the Organic Research and Extension Initiative incrementally from 60 million in 2024 to 100 million U.S. dollars in 2028. The bill transforms the Organic Transition Research Program (ORG) into the Researching the Transition to Organic Program (RTOP) with authorization for 10 million in appropriations during the years 2024-2026 and 20 million U.S. dollars from 2027-2028. Finally, SOAR doubles Organic Production and Market Data Initiative (ODI) funding and directs USDA's Economic Research Service to conduct a full evaluation of the economic impact of organic agriculture. The Senate companion bill OSRI would also create a new Coordinating and Expanding Organic Research Initiative to catalog current research on organic food and agriculture, and guide increasing organic agriculture research by USDA.

– **Opportunities in Organic (OIO) Act**

Introduced in the House and the Senate, this bill increases organic cost share to 1500 U.S. dollars per scope or more for producers in a high-certification cost region or who are members of a socially disadvantaged group. The bill includes funding for organic transition, processing construction, and technical assistance. Opportunities in Organic would be funded at 50 million U.S. dollars in 2024 and 2025, 80 million U.S. dollars in 2026, and 100 million U.S. dollars in 2027 and 2028, available for both farmers and organizations who administer approved activities under the Act.

– **Organic Dairy Assistance, Investment, and Reporting Yields (O DAIRY) Act**

Introduced in the Senate, O DAIRY would mandate organic data collection on dairy cost of production, feedstuff prices, and milk prices. The bill would extend Emergency Assistance for Livestock, Honeybees and Farm-Raised Fish Program (ELAP) funding to organic dairy farms suffering more than 10 percent annual income loss from organic feed shortages and increased input costs. O DAIRY requires USDA to develop a proposal for a new organic dairy safety net program and establish programs to boost investment in the sector.

– **Agriculture Resilience Act (ARA)**

Introduced in the Senate and the House, the ARA seeks to achieve net-zero greenhouse gas emissions in U.S. agriculture by 2040 with comprehensive reforms. The bill offers several benefits for organic producers, including equity in Environmental Quality Incentives Program (EQIP) conservation payments, which currently cap organic payments lower than conventional. The ARA would increase organic cost share to 1500 U.S. dollars per scope and incentive organic practices across USDA programs.

– **Seeds and Breeds for the Future Act**

Introduced in the Senate, the Seeds and Breeds for the Future Act dedicates 75 million U.S. dollars in USDA research grants for new public seeds and animal breeds and establishes a coordinator to receive stakeholder input and coordinate research among agencies and breeders, including small-scale organic breeders. The bill ensures public accessibility to the seeds and breeds developed under the grant funding. The act will increase public use of regionally adapted, resilient seeds and breeds.

– **Expanding Agricultural Exports Act**

Introduced in the Senate and the House, the Expanding Agricultural Export Act doubles annual funding for both the Market Access Program and the Foreign Market Development Cooperator Program. The programs empower companies with U.S.-grown products to increase their presence in foreign markets. Funding for the programs have remained stagnant since 2006 and 2004, respectively.

– **USDA Spending Accountability Act**

Introduced in the Senate, the USDA Spending Accountability Act limits the spending authority of the Commodity Credit Corporation (CCC). The bill was introduced in reaction to the Biden Administration's reliance on the CCC to move priorities through USDA without specific congressional approval. The organic industry benefitted from CCC flexibility in 2023 through the rollout of the Organic Dairy Marketing Assistance Program.

More support for organic from USDA

A number of supportive programs for organic were either introduced or expanded by the Department of Agriculture during the year, many of these made possible by USDA's historic **Organic Transition Initiative (OTI)**, the department's 300 million U.S. dollar program announced in 2022 to promote organic agriculture through technical transition assistance, direct farmer assistance, and support for organic market development.

In January, USDA officially announced its new **Organic Dairy Marketing Assistance Program (ODMAP)** to help small- and medium-sized organic dairy operations who, after weathering the pandemic, were faced with additional challenges from unprecedented shocks to global trade. After the invasion of Ukraine, organic dairy farmers were hit with catastrophic economic challenges as the availability of organic feedstuffs declined dramatically and costs climbed significantly. The Organic Trade Association and its members spearheaded a drive in Congress to bring the urgent issue

to the attention of USDA. In May, USDA announced 104 million U.S. dollars in available relief under the new program.

USDA announced it would issue up to 75 million U.S. dollars of the available relief in grants through its new **Organic Market Development Grant (OMDG)** program that is part of the Organic Transition Initiative. The program is designed to help improve domestic organic supply chains with pinpointed market development to create critical new paths to market for climate-smart organic farmers. By aiding in the expansion of markets or development of new markets, building out processing and marketing facilities and creating new uses for organic products, the aim of the program is to increase the consumption of U.S.-produced organic agricultural commodities.

Also in May, the Agriculture Department announced it would be returning its **Organic Certification Cost Share** program to the 75 percent reimbursement level. The Organic Certification Cost Share program is critical for attracting new, young farmers to organic. Due to funding shortfalls, USDA had previously reduced the reimbursement rates to 50 percent of the certified organic operation's eligible expenses, up to a maximum of 500 U.S. dollars. USDA's action raised the allowable maximum transition assistance received by farmers to 750 U.S. dollars each year (75 percent of the certification fee) to help defray the annual costs of organic certification. Additional funding for this important long-standing program will help build a diverse and thriving organic agriculture community.

Additional support for organic continued to be made available through the Organic Transition Initiative. As part of the initiative, the Natural Resource Conservation Service dedicated 70 million U.S. dollars for conservation payments under a new organic practice standard available in the lower 48 U.S. states. The interim **823 organic management practice standard** requires farmers to adopt a new practice under their organic system plan. In the first year of the standard, 120 contracts worth \$13 million were awarded. The standard will be available again in 2024, funded through general Environmental Quality Incentives Program (EQIP) funding.

The Organic Transition Initiative dedicated 25 million U.S. dollars to the **Transitional Organic Grower Assistance Program (TOGA)** under the Risk Management Agency (RMA). TOGA provided premium crop insurance assistance to organic and transitioning farmers who purchased an additional coverage policy. Crops in transition received 10 percentage points of premium subsidy. Organic grain and feed crop farmers received a \$5 premium per insured acre. Finally, farmers using the Whole Farm Revenue Program (WFRP) who grew organic or transitioning crops received 10 percentage points of premium subsidy.

Organic Trade Association awarded lead role in USDA Organic Partnership Program

The Organic Trade Association was selected in June as a national partner for USDA's Transition to Organic Partnership Program, a key component of the agency's Organic Transition Initiative (OTI). Rodale Institute, long a recognized leader in research and technical expertise on organic agriculture, is the core partner to OTA in the project. As

the Lead Cooperator for this project, the trade association manages and oversees activities throughout the country that support market development for organic products, facilitate the matching of organic producers and suppliers and educate handlers in effective ways of dealing with organic products.

The Transition to Organic Partnership Program (TOPP) is a critical part of OTI, which was developed to help foster organic agriculture, make much-needed technical assistance available to transitioning and existing organic farmers and to build new and better markets and streams of income for organic producers. It is the largest single investment in organic agriculture ever made by USDA.

Through TOPP, USDA and its partnering organizations will provide locally-based farmer training and education in six regions across the United States. The national-level TOPP agreements will supplement and collaborate with this regional work, providing nationally-focused coordination and services.

The three main priority areas being developed by OTA, Rodale and other partners are:

- Technical assistance and workshops at the national and regional levels on the various aspects of developing markets for organic products, including educating and empowering farmers and handlers by addressing market trends, marketing and business strategies, and other relevant topics to help them succeed in the organic marketplace;
- Strategies to connect organic producers with buyers, including the organization of in-person buyer/seller events and hosted buyer tours of regional areas that will provide a forum for networking and interaction, as well as listing participants in online clearinghouses and databases that allow for targeted searching;
- The Handler Transition Training/Education program which will provide comprehensive training materials and educational resources to support handlers in effectively managing organic products, looking at such handling concerns as labeling, contamination prevention, storage, fraud prevention plans and more.

USDA funds organic research

Government funding for organic research is vital for the growth of the sector. The 2018 Farm Bill increased funding for USDA's Organic Agriculture Research and Extension Initiative (OREI) research program to 50 million U.S. dollars per year by 2023, thus establishing permanent funding for the program. In September, USDA awarded a total of more than 50 million U.S. dollars in grants for 24 OREI projects and for 8 Organic Transitions Program (ORG) projects. The Organic Transitions Program helps existing and transitioning organic livestock and crop producers adopt organic practices.

The Organic Agriculture Research and Extension Initiative (OREI) awards totaled a little over 43 million U.S. dollars in funding. OREI helps support wide-ranging research projects that specifically address the most critical issues impacting organic growers. The Organic Center, the non-profit research organization which operates under the administrative auspices of the Organic Trade Association, was the recipient of almost 900,000 U.S. dollars in federal funds through OREI to enable The Organic Center to collaborate in four of the new research grant projects.

The projects involving The Organic Center will address a host of vital and diverse challenges facing today's organic agriculture, including how to ensure food safety in organic production systems; the exploration of organic farming methods that increase resilience to climate change and also help fight pests; the benefits and challenges of livestock grazing in orchards; and ways to expand organic cotton production in the United States.

Earlier in 2023, USDA's Agricultural Marketing Service announced that 72.9 million U.S. dollars were awarded to 55 states and territories through the Specialty Crop Block Grant Program (SCBGP). Eighteen of the awards that went to 15 state departments of agriculture include funding for specialty crop marketing, education, and research benefiting organic.

Despite challenges, U.S. organic sector continues on upward path

The Organic Trade Association every year sponsors a survey of the U.S. organic retail sector. Numerous data sources are compiled to create as complete a picture as possible of the organic industry, which consists largely of private companies. Inputs include but are not limited to point-of-sale data, expert interviews, annual report data, and in-depth direct survey data. The OTA survey is regarded as the most comprehensive look at the U.S. organic retail sector.

United States: Development of US Organic Retail

Sales 2013-2021

Source: NASS/USDA

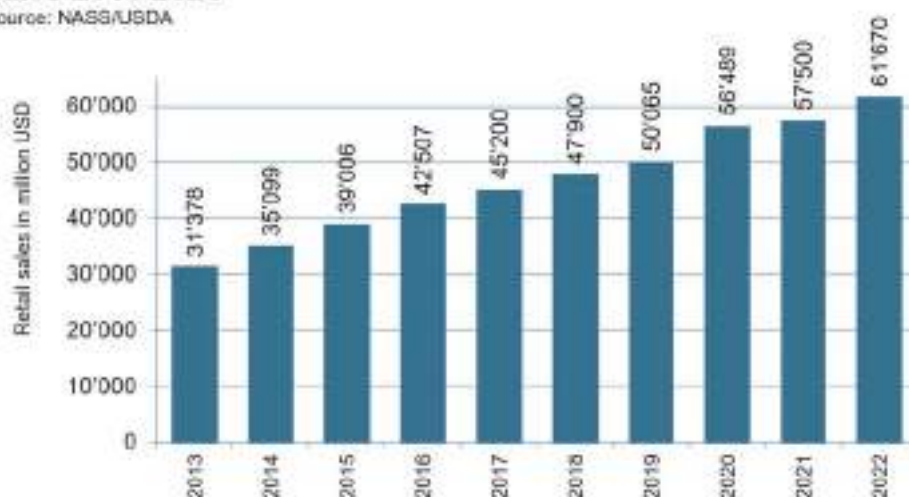


Figure 100: United States: Development of organic retail sales 2013-2022

Source: OTA

According to OTA's 2023 Organic Industry Survey, organic food sales in the United States in 2022 broke through the 60 billion U.S. dollar mark for the first time, hitting another high-level mark for the resilient organic sector (Figure 100). Total organic sales – including organic non-food products – were a record (67.6 billion U.S. dollars).

The organic market grew despite challenging headwinds: inflation pressures tightening consumer wallets, supply chain disruptions caused by the pandemic and global political events, a proliferation of competing food labels in the grocery aisles, and a labor shortage felt acutely by organic producers. Inflation heated up costs across the organic supply chain – indeed, the entire food supply chain – and boosted prices in the grocery aisles. As a result, the organic sector reflected the overall food sector, with the value of organic sales rising even as the growth in the volume of sales for some categories slipped.

The sector's four-percent growth in sales value was nearly twice the pace of growth in 2021. Organic food sales totaled 61.7 billion U.S. dollars, while the value of organic non-food sales hit nearly 6 billion U.S. dollars. Certified Organic now accounts for 6 percent of total food sales in the United States.

- Organic produce held its position as the top seller of all organic categories. Sales of organic produce totaled 22 billion U.S. dollars, accounting for 15 percent of all fruit and vegetable sales in this country.
- Organic beverages were the second best-selling organic category, reporting 9 billion U.S. dollars in sales in 2022, up 4 percent.
- Organic coffee maintained its position as the biggest-selling organic beverage, up almost 7 percent from the year before, with close to 2.3 billion U.S. dollars in sales.
- Organic soft drinks and enhanced drinks broke through 500 million U.S. dollars in sales at 503 million U.S. dollars and saw robust growth of almost 14 percent.
- The third highest-selling organic category was dairy and eggs at 7.9 billion U.S. dollars, up over 7 percent from the previous year. Organic dairy and eggs now constitute close to 8 percent of the total dairy and egg market. Continued demand and inflationary price increases helped boost the dollar sales in that category; yogurt and eggs both saw double-digit growth, with organic yogurt sales jumping by over 12 percent to 1.5 billion U.S. dollars, and organic egg sales by 11 percent to around 1.2 billion U.S. dollars.
- In the organic non-food category, sales of organic linens and clothing accounted for some 40 percent of sales, recording 2.4 billion U.S. dollars in sales for a gain of 2.5 percent.
- Organic supplement sales held steady with sales of around 2 billion U.S. dollars, while
- Organic personal care products rose over 5 percent to 1.2 billion U.S. dollars.

In 2008, the USDA conducted its first census of organic agriculture. USDA's most recent organic census, released in December of 2022, showed that between 2019 and 2021, the number of certified organic farms with organic production in the country increased 5 percent to 17,445, and the number of certified acres decreased 11 percent to 4.9 million. Certified organic cropland increased 3 percent to 3.6 million acres (1.5 million hectares) while certified organic pastureland declined 36 percent to 1.3 million acres (0.5 million hectares).

California led U.S. states in both the number of farms and acres, with 3'061 certified farms and 813'710 acres (329'296 hectares). The state accounted for 17 percent of total U.S. certified organic land. Only three other states had more than 1'000 certified organic farms: Wisconsin (1'455), New York (1'407), and Pennsylvania (1'125).

United States: Development of U.S. organic producers 1999-2021

Source: USDA

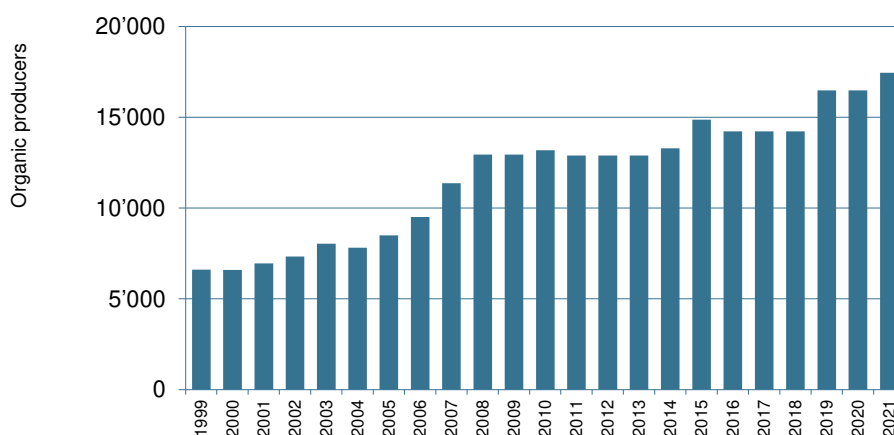


Figure 101: United States: Development of organic producers 1999 -2021

Source: USDA

Global demand for U.S. organic grows

Global demand for U.S. organic continues to grow as American exporters introduce new products annually to consumers overseas. USDA statistics show a nearly 20 percent increase in exports over the last five years, including over 678 million U.S. dollars in U.S. organic exports in 2022.

Canada and Mexico remain the primary export destination for U.S. organic products by a wide margin, though Japan, Taiwan, South Korea, and the United Arab Emirates are also strong export markets. Within the last couple of years, China and Vietnam have also edged into the top 10 export destinations for the first time.

Despite this success, the growing international market for organic trade has faced several recent challenges that have impacted U.S. exporters, including shifts in equivalency agreements around the globe, Brexit, the aftermath of a U.S. antidumping investigation against the Indian government, and the impacts of the war in Ukraine. However, over half of U.S. organic companies have reported that they export at least some of their products, and nearly 15 percent of companies hope to export in the near future.

The Organic Trade Association received a record level of funding of more than 1 million U.S. dollars from USDA's Market Access Program (MAP) to promote U.S. organic

products around the world in 2023. The award was an almost 10 percent increase from the 2022 levels, and the largest MAP award ever received by OTA.

At the time of this writing, USDA had not yet announced its MAP funding for 2024.

OTA currently has four international market development activities planned for 2024 which will kick off with the world's largest trade fair for organic products, Biofach, followed by trade shows and buyer missions that span Asia, Europe, and the Middle East. In addition to these headline events, the funding will continue to support consumer promotion activities focused on Canada, Japan, Korea, the Pacific Rim, and worldwide organic education and promotion.

Additionally, in October 2023, the USDA announced a new opportunity for funding through a 1.3 billion U.S. dollars investment in a Regional Agricultural Promotion Program (RAPP) to strengthen existing markets and develop new market opportunities within Asia and Africa. This program will ensure the continuity of key relationships and development fostered from the Agricultural Trade Promotion Program (ATP), which is set to expire in 2024. Like USDA's Market Access Program, OTA will apply for this new funding program in 2024 to supplement its current organic consumer and trade promotional work.

Canada

TIA LOFTSGARD¹

More Canadian land is becoming certified, yet decline in operators

The organic marketplace in Canada continues to expand, with Canada maintaining its position as the fifth largest country for consumer demand. The Canadian organic sector continued to experience some disruptions like most other regions of the world. Canada lost 3.84 percent (296) of the total certified operators since 2021, bringing the total to 7'702 certified operators at the end of 2022. Still, certified processors experienced a growth of 8 percent to increase from 1827 in 2021 to 1973 in 2022. The production sectors declined slightly—by 0.9 percent to 777 certified livestock operations and by 0.5 percent to 6'069 certified growers. Although Canada experienced a decrease in operators, more acres were converted to organic in 2022. Organic acreage increased by 23 percent to more than 3.8 million acres, nearly 1.51 million hectares.

Continued strong demand for Organics

The organic sector, including all other non-regulated products such as textiles and pet food, grew to 10.26 billion Canadian dollars in 2022. Organic food and beverage sales in 2022 topped 7.943 billion Canadian dollars, about 9.7 percent higher than that recorded in 2021. The non-food segments grew similarly to food and beverages (about 9.7 percent). Canadians are committed to organic in many sectors of the economy — as consumers, farmers, educators, exporters, researchers, and manufacturers. There is a shared recognition that the organic industry is not just about environmental stewardship, healthful eating choices, or supporting local farmers – it's about all those things. As per consumers, 60 percent of Canadians are willing to pay more for products that are organically sourced whereas 55 percent seek organically produced food when shopping or dining out.

Growing health consciousness is a key driver of demand for organic food. In 2022, more people were eating organic food than ever before, where 23 percent of Canadians are buying more organic than a year before.

Organic produce continues to be the gateway to organic, having 6.2 percent of the total market share. 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 and has 2.9 percent of total market share. However, organic meat has 0.7 percent of total market share.

¹ Tia Loftsgard, Executive Director, Canada Organic Trade Association, Ottawa, Canada, www.canada-organic.ca

Canada's position in the global marketplace

Canadian exports have experienced a large increase over 2021, with 2022 data showing organic exports at more than 554 million Canadian dollars, up from 417 million Canadian.

2022 Canadian organic imports totalled more than 935 million Canadian dollars in 2021, a growth of over 9 percent since 2021.

Quebec exports 38 percent of Canadian organic products having maple as the number 1 exported product in dollar value. Ontario imports almost 45 percent of Canada's organics, followed by British Columbia at 29 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 2023, Canada signed new equivalency arrangements with Mexico and South Korea. Canada also expanded the scope of the Japan arrangement to include alcohol.

References

Canada Organic Trade Association publications: <https://canada-organic.myshopify.com/collections>
Statistics Canada: <https://www.statcan.gc.ca/eng/start>

Organic Agriculture in North America: Key Facts and Figures

JAN TRÁVNÍČEK,¹ BERNHARD SCHLATTER² AND HELGA WILLER³

North America had nearly 3.5 million hectares of organic farmland in 2022

In North America, more than 3.5 million hectares were managed organically in 2022. Nearly 3.8 percent of the world's organic farmland was in North America.

With only two countries reporting organic farmland in North America, the US had the largest farmland area under organic management (2'060'741 hectares, followed by Canada (over 1'567'000 hectares).

In North America, organic farmland increased by more than 350'000 hectares.

In North America, organic land witnessed a 10.7 percent increase, equivalent to an increase of 351,488 hectares from 2021 to 2022. While the United States experienced a decline in organic farmland, Canada saw an increase. Over the period from 2013 to 2022, organic farmland in North America grew by 19.0 percent.

North America: Organic farmland share is at almost 1 percent

Organic farmland in North America constituted 0.8 percent of the continent's total agricultural land, which was below the global organic area share of 2.0 percent in 2022. The US reported a share of 0.5 percent, while Canada had 2.7 percent of its farmland as organic.

Key crops grown are cereals, oilseeds and dry pulses

More than 44 percent of the organic farmland in North America was used for arable crops (1.6 million hectares). Among the key crops were cereals (705'834 hectares), oilseeds (195'232 hectares) and dry pulses (151'950 hectares).

Permanent crops accounted for approximately 8 percent of total organic land in North America in 2022. Among the key crops were berries (23'819 hectares), temperate fruit (18'815 hectares) and grapes (18'535 hectares).

Nearly 24'000 farmers

There were more than 23'948 organic producers in North America. A total of 17'445 producers were counted in the US and 6'503 in Canada.

¹ Jan Trávníček, Czech Organics, Staré Město, Czech Republic, www.czechorganics.com

² Bernhard Schlatter, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

³ Helga Willer, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

More than 64 billion euros in retail sales

Organic retail sales for North America reached 64.4 billion euros in 2022. The USA, which is the largest single market in the world (followed by the European Union), reported retail sales of 58.6 billion euros, whereas Canada had 5.8 billion euros.

Organic exports – strong growth

US organic import and export data has been available since 2014, whereas data on organic export volumes in metric tons to the European Union has been available since 2018.

Data show that in 2022 over 222'995 metric tons of products were exported from North America to the EU and US/Canada, constituting 4.6 percent of all organic exports to these countries or trade blocks. In the 5-year period from 2018 to 2022, North American exports increased by almost 76 percent, growing considerably faster than global organic exports to the EU and US, which grew by only 9 percent in the same period.

Canada exports mainly to the US

The larger North American exporter was Canada, with more than 214'091 metric tons of products, mainly cereals and soybeans. Canada exported nearly 193'000 metric tons to the US and more than 30'000 metric tons to the EU. US exports to the EU reached more than 8'900 MT.

Cereals are the most important export product

With almost 142'000 metric tons and almost 64 percent of the North American organic exports, cereals (mainly maize, oats and wheat) were the most important product group, followed by oilseeds (29'752 metric tons, mainly soybeans) and fresh vegetables (17'031 metric tons, mainly cucumbers, tomatoes and peppers).

For more information about the North American figures, see figures and data tables, on the following pages.

For detailed data on organic agriculture in North America, please refer to the tables provided in the Annex, page 330.

Organic Agriculture in North America: Graphs

Northern America: Organic agricultural area 2022

Source: COTA and USDA, 2023

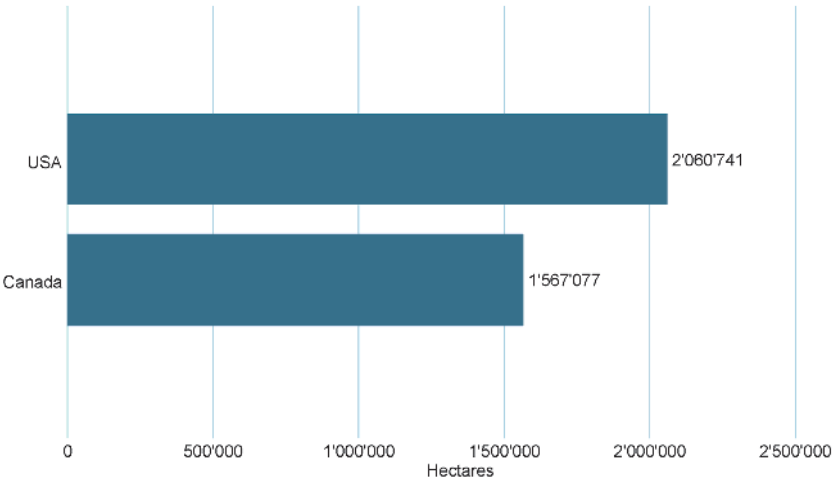


Figure 102: North America: The ten countries with the largest organic agricultural area 2022

Source: USDA and COTA 2024. For detailed data sources, see annex, page 335.

Northern America: Organic share of total agricultural land 2022

Source: COTA and USDA, 2023

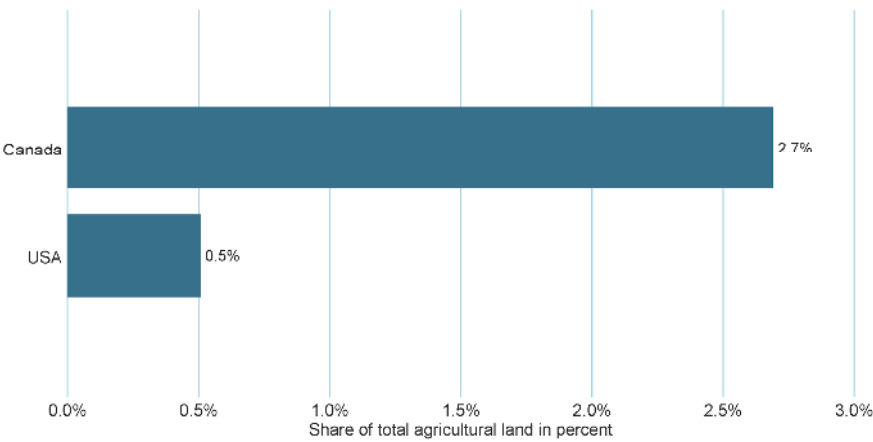


Figure 103: North America: The countries with the highest organic share of total agricultural land 2022

Source: USDA and COTA 2024. For detailed data sources, see annex, page 335.

Northern America: Development of organic agricultural land 2000 - 2022

Source: COTA and USDA, 2023

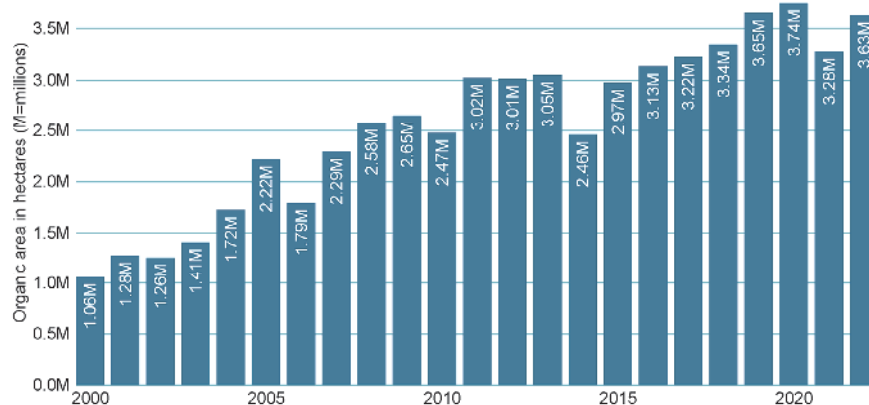


Figure I04: North America: Development of organic agricultural land 2000-2022

Source: FiBL-IFOAM-SOEL-surveys 2001-2024 based on national data sources

North America: Use of organic agricultural land 2022

Source: FiBL survey 2024

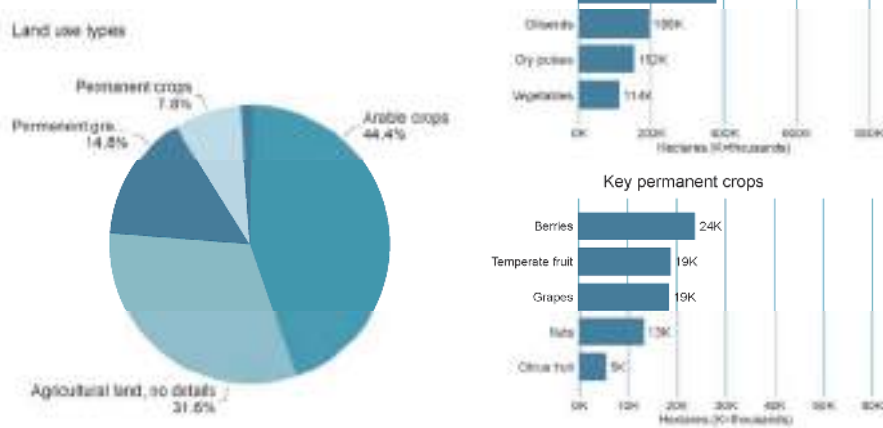


Figure I05: Northern America: Use of organic agricultural land 2022

Source: USDA and COTA 2024. For detailed data sources, see annex, page 335.

Northern America: Key commodities exported to the EU and US in 2022

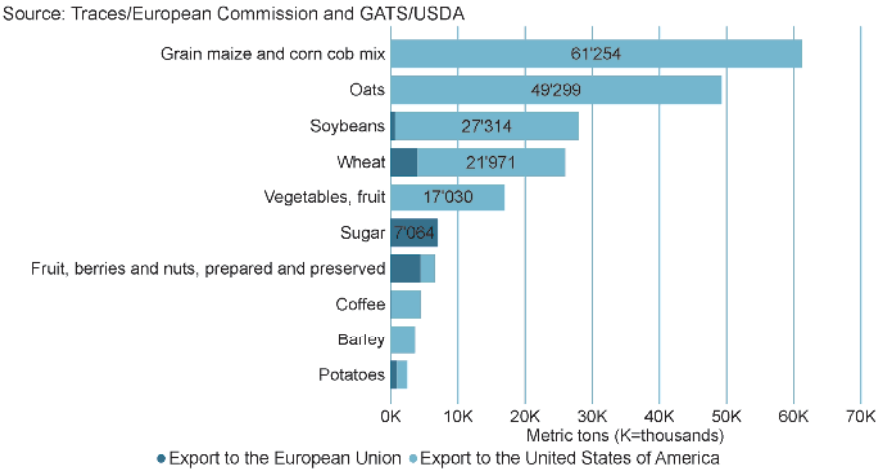


Figure I06: North America: Key commodity exported to the EU and US (export volume in MT)

Source: GATS/USDA TRACES/European Commission. For detailed data sources, see annex, page 335.

Northern America: Export to the European Union and the United States 2022

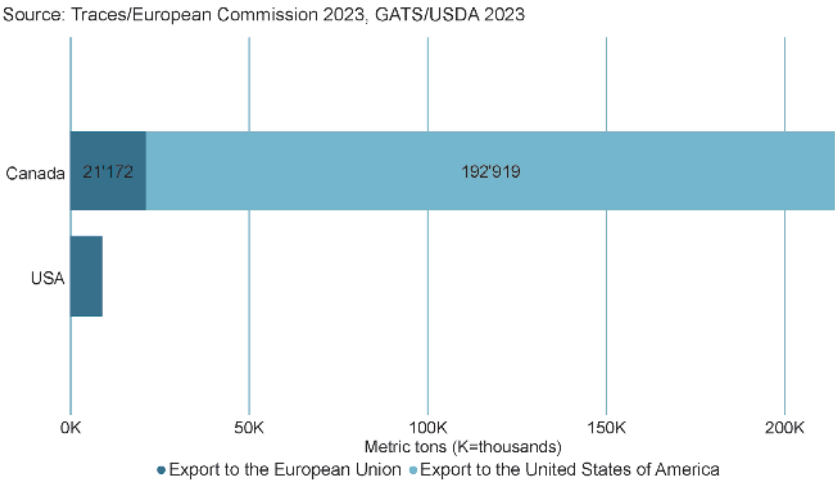
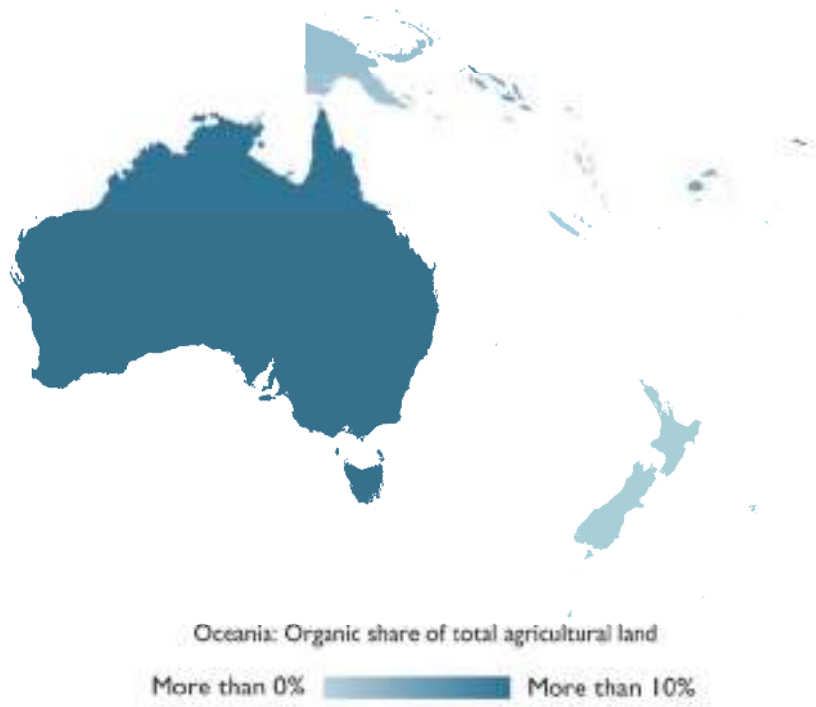


Figure I07: Northern America: Key countries exporting to the EU and US (export volume in MT)

Source: GATS/USDA TRACES/European Commission. For detailed data sources, see annex, page 335.

Oceania



Map 7: Organic agricultural land in the countries of Oceania 2022

Source: FiBL survey 2024, based on information from the private sector, certifiers and governments.

Key Organic Developments in Australia

KANE FRAMPTON¹

2023 was a productive year for the Australian organic sector as far as agriculture is concerned, with a return to more favourable growing conditions following the disastrous East Australian flood events of early 2022. While challenges prevailed around supply chain and other logistics in the wake of the COVID-19 pandemic, many operations were able to re-establish themselves and capitalise on strong demand for organic goods in domestic and export markets.

Australia's certified organic industry is perhaps in its infancy when compared to more established programs across the globe, but a comprehensive study released in early 2023 showcased the nation's potential to become a major player on the world organic stage.

A world leader in land under organic certification

The Australian Organic Market Report 2023 was unveiled on 2 May, a first-of-its-kind publication in that all of Australia's four largest certification bodies contributed data to the study (ACO Certification Ltd, NASAA Certified Organic, Southern Cross Certified and AUS-QUAL).² This level of participation, as well as first-hand submissions from operators, supported confident projections around the strength and scope of the sector. Perhaps the most noteworthy statistic to come out of the Market Report was Australia's global dominance when it comes to certified organic land. More than 53 million hectares of Australian land was certified organic in 2022, up from 35.7 million hectares in 2020. The 2022 figure is approximately 70 per cent of all organic land globally, highlighting the Australian sector's potential for sustained growth.

The Market Report showed that Australia's organic industry directly contributes 851 million Australian dollars³ to the Australian economy, with this figure rising to 2.6 billion Australian dollars once flow-on effects to the broader economy are considered (inter-industry purchases, etc.). The sector is also responsible for more than 22'000 full-time equivalent jobs, with a total of 3'035 certified organic businesses registered as of 2022. This number of businesses has declined slightly since 2018, in keeping with general trends around farm business consolidation. Small business challenges accentuated by extreme weather conditions and the COVID-19 pandemic are also likely to have contributed to this decline.

Despite this contraction, the Market Report projected that domestic demand for organics will grow significantly in the years ahead thanks to strong consumer sentiment

¹ Kane Frampton, Communications Officer, Australian Organic Limited, Nundah, Australia, www.austorganic.com

² Australian Organic Limited (2023) Australian Organic Market Report 2023. Australian Organic Limited, Nundah, QLD, Australia, www.austorganic.com

³ According to the Central European Bank, 1 Australian dollar corresponded to 0.6 euros in 2022.

and a robust retail environment. A similarly positive outlook was presented for exports, which are forecast to expand by 29 per cent annually from 2021-22 to 2026-27. In 2022, approximately 20'000 metric tons of Australian organic products were exported to 36 countries worldwide, with the most exports going to the United States (48 per cent) followed by Singapore at 19 per cent, with Sweden and Malaysia both next at 7 per cent. This projected export strength is a positive sign, especially given the Australian industry's present lack of domestic regulation and the challenges this poses for market access.

Protracted efforts to establish a domestic regulatory framework

As detailed in previous editions of this book, Australia is one of only a few developed countries in the world without a domestic standard governing the use of the term “organic” for product claims. This means there is no mandatory requirement for operators to certify their goods as organic in the domestic market, with only exported products requiring certification.

This lack of framework has long since been a point of contention in industry circles, with the sector formally lobbying government to enact a domestic regulatory instrument for more than four years. These efforts were struck down on 30 March 2023 when federal Minister for Agriculture Senator Murray Watt opted against creation of a mandatory organic standard.

Minister Watt cited the results of two separate cost-benefit analyses as the reason behind not enacting regulation, stating that “...while a mandatory domestic standard could provide a range of potential benefits for the organic sector, the costs of designing, monitoring and enforcing an economy-wide regulatory scheme of this nature would be significant”.¹

In March 2023 the decision was met with significant frustration from sectors of the local industry, many of whom felt it would erode industry credibility and compound issues for those looking to export organic goods, where operators already face red tape in accessing lucrative markets. The cost premise was also disputed, as the analyses did not consider any potential monetary boosts that regulation would have on the export market.

Establishment of Organic Development Group (ODG)

The dust had barely settled on the Minister's decision when key Australian industry bodies mobilised to create a singular, united voice to act on behalf of the industry in future discussions with the government. The Organic Development Group (ODG) was officially announced on 7 August 2023, encompassing eleven industry bodies listed.²

¹ Watt, M (2023) Cost of organics regulation outweighs benefits, Minister for Agriculture, Fisheries and Forestry, available online at <https://minister.agriculture.gov.au/Watt/media-releases/cost-of-organics-regulation-outweighs-benefits>

² Australian Organic Limited (2023), Historic formation of united voice for organic industry, available online at <https://austorganic.com/historic-formation-of-united-voice-for-organic-industry/>

- ACO Certification Ltd (ACO)
- Australian Organic Limited (AOL)
- Bio-Dynamic Research Institute (BDRI)
- Certified Organic Biodynamic Western Australia (COBWA)
- National Association for Sustainable Agriculture Australia (NASAA)
- NASAA Certified Organic (NCO)
- Organic and Regenerative Investment Co-operative (ORICOOP)
- Organic Consumers Association Australia (OCAA)
- Organic Food Chain (OFC)
- Organic Industries of Australia (OIA)
- Southern Cross Certified (SXC)

This list notably includes all five of Australia's approved organic certification bodies, as well as the leading agricultural, retail and industry bodies from across the sector. Backed by a high-level secretariat resourced by industry participants AOL and NASAA, the Organic Development Group has convened multiple internal discussions as well as meetings with parliamentarians throughout 2023.

Renewed connection between government and industry was demonstrated by the creation of a federal parliamentary "friendship" group in support of the organic sector. This bi-partisan group was established by Liberal MP Aaron Violi and Labor MP Dan Repacholi, with a stated remit to "provide a forum for MPs and Senators to meet Australian organic producers and operators along the supply chain ... to discuss growing economic benefits, opportunities and challenges in the industry."¹

The inaugural meeting of this group was held in the courtyards of Parliament House in the nation's capital Canberra, where a highly successful organic barbecue was held on 7 September. Certified organic operators from across the country mingled with key political figures, including Minister for Agriculture Senator Murray Watt, who reiterated a commitment to supporting the industry and driving improved outcomes. The collaborative event was so warmly received that an undertaking was made to host it annually each September.

Pricing competitiveness of organic versus non-organic in Australia

Australia is no different to many other countries in that certified organic products often attract a price premium over non-organic, in large part due to the increased labour that is usually associated with organic production. The level of this premium in Australia was examined via a comprehensive "basket" pricing review of selected certified organic groceries (and their non-organic equivalents) from major retailers Woolworths, Coles and Harris Farm Markets.

¹ Parliament of Australia (2023), Parliamentary Friendship Groups (non-country), available online at https://www.aph.gov.au/about_parliament/parliamentary_friendship

The research, conducted by independent market research firm Mobium Group, was first carried out in June 2022, with the same items purchased twelve months later in 2023 to assess changes in pricing. The shopping list of items included fruit & vegetables, pantry items, dairy & eggs, beverages and meat.¹

Notably, the study found that the price premium for organic goods compared to non-organic had shrunk – from 32 per cent in 2022 to 25 per cent in 2023, as an average across all three retailers. The price of non-organic grocery items was found to have risen by 9.3 per cent across the relevant twelve months, compared to a 4 per cent price increase for organic grocery items.

Studies such as this may prove illuminating for the nation's prospective organic shoppers, given that price is the most cited barrier to organic purchase for Australian consumers.

Other organic sector developments

AUS-QUAL Pty Ltd, one of Australia's approved organic certification bodies, voluntarily withdrew its accreditation for the National Standard for Organic and Bio-Dynamic Produce as of 31 July 2023, ceasing organic certification activities.²

From a policy perspective, the Australian organic sector has a keen interest in current negotiations around the proposed Indo-Pacific Economic Framework (IPEF), of which Australia is a founding member. The industry looks forward to the finalisation of the agricultural section of the IPEF's trade pillar in the months ahead. IPEF is intended to "... establish a contemporary style of trade architecture, which could cover modern trade rules as well as specific regional projects and initiatives."³

Finally, the Bureau of Meteorology announced on 19 September 2023 that El Niño and a positive Indian Ocean Dipole (IOD) are both underway⁴, with these two climate drivers likely to increase drought and bushfire risks while reducing crop yields into 2024.

Managing extreme weather conditions has long since been a challenge for agriculture operators in the land of "drought and flooding rains". As of this writing, it remains to be seen how damaging these two climate drivers will prove to be for the nation's organic operators. The cataclysmic Black Summer bushfire season of 2019-20 is still fresh in the mind, with organic farmers preparing emergency action plans in case history repeats.⁵

¹ Australian Organic Connect (2023), Industry Research: Certified Organic Price Review, available at https://issuu.com/australianorganic/docs/spring_2023/14

² IOAS (2023), AUS-QUAL Pty Ltd voluntary withdraws from ISO/IEC 17065 accreditation, available at <https://ioas.org/latest-news/aus-qual-pty-ltd-voluntary-withdraws-from-iso-iec-17065-accreditation/>

³ Department of Foreign Affairs and Trade (2023), Indo-Pacific Economic Framework, available at <https://www.dfat.gov.au/trade/organisations/wto-g20-oecd-apec/indo-pacific-economic-framework>

⁴ Bureau of Meteorology (2023), The Bureau declares El Nino and positive Indian Ocean Dipole events, available at <https://media.bom.gov.au/releases/1183/the-bureau-declares-el-nino-and-positive-indian-ocean-dipole-events/>

⁵ Kane Frampton, Marketing Coordinator, Australian Organic Limited, Nundah, Australia, www.austorganic.com

The Pacific Islands

KAREN MAPUSUA¹

Recent developments

The post-COVID era is seeing as yet unrealized opportunities for organic agriculture in the Pacific. Despite the global economic challenges, tourism in the region is at pre-COVID levels or higher in some cases, combined with the increasing costs of importing food and ongoing interest in health and wellness, resulting in opportunities for local organic producers in the local market. The sector, however, is not yet as scale or with organized value chains to capitalize on these opportunities.

However, Governments are continuing to take action to create a supportive policy environment, the demand for certification continues, and regional and national agencies and development partners continue to recognize the value of organic agriculture as a development tool for the Pacific islands context.

The Government of French Polynesia is utilizing the FAO Tool for Agroecological Performance to undertake their agriculture census 2023, which provides a valuable data set that captures and differentiates organic from conventional farms on a wide range of production, ecological and social indicators. It is the first time globally that this tool is being used at a national or territorial scale.

The role of women in agriculture and the organic sector has been a growing focus with the regional peak body for organic agriculture forming a women's chapter with the aim to elevate women's roles, leadership, participation, and contributions to the organic and ethical trade movement. It will do this through coordination, information sharing, networking, and capacity building of women in the sector for greater equality and the enhancement of livelihoods, health, ecology, fairness and care, culture and traditions for the benefit of the Pacific organic community.

Market, trade and certification

As most of the organically certified products from the Pacific are for export, the pandemic reoriented some producers towards the local market, giving 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. Organized value chains in the retail and hospitality sectors are still underdeveloped. The following is a summary table listing the main products that are currently 3rd party organically certified in the Pacific:

There remain no mechanisms for collecting local organic market data. Still, growth can be inferred from the growth in PGS-certified farms and the number of organic value chains and market opportunities. The countries are investigating the possibility of

¹ Karen Mapusua, President of IFOAM - Organics International, Bonn, Germany and Director Land Resources Division, Pacific Community (SPC) and President of IFOAM - Organics International, Suva, Fiji

collecting agricultural data supported by artificial intelligence as is currently utilized in the fisheries sector. It could benefit from gathering this information for the organic sector if successful.

Table 27: Pacific Islands: Key crops grown

Country	Crops
Cook Islands	Noni Juice
Fiji	Noni Capsules, Noni Dried Fruit, Noni Fruit Frozen, Noni Fruit Oil Noni Fruit Powder, Noni Juice, Noni Leaf Dried, Noni Leaf Oil, Noni Leaf Powder, Noni Seed Oil, Coconut Meal, Virgin Coconut Oil, Cassava, Citrus, Cocoa beans, Coconut, Fresh ginger, Fresh turmeric, Frozen Ginger, Frozen turmeric, Lemon grass, Noni, Passion fruit, Taro, Vanilla bean
French Polynesia	Pineapple juice, Pineapple wine, Coconut milk and Extra virgin coconut oil / Second pressing oil, Sugar Cane, Noni Juice, Tamanu oil, Tiahé Flower
New Caledonia	Sandalwood, Tropical fruits, Citrus fruits, Leafy vegetables, bulb vegetables, fruit/pod vegetables, root & tuber vegetables, stem vegetables, legumes, aromatic and medicinal plants, ornamental plants, and forest products.
Papua New Guinea	Vanilla, Coconut Soap Lavender, Coconut Soap Lemongrass, Coconut Soap Patchouli, Coconut Soap Pure Unscented, Virgin Coconut Oil, Coffee Beans, Cocoa, Tea
Samoa	Noni, Coconut
Solomon Islands	Coconut, Cocoa
Vanuatu	Copra meals, Coconut oil, Sandalwood, Tamanu

Source: POETCom

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 provide support to 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 2022, 12 PGS were approved to use the Organic Pasifika Mark, with five additional PGS under development. The number and variety of PGS-certified products on local markets and for export is expanding, and 2022 saw the range grow to include value-added products such as nut butter and pesto. 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, and Cook Islands now have certified produce sold through farmers' markets. The Solomon Islands also has a small store selling local PGS organic products.

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 Governments of Palau and Fiji now have draft policies waiting for official endorsement by authorities.

Government and international (development) support

As a regional intergovernmental organization, the Pacific Community continues to support 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 through 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 reliance and livelihood development is demonstrated through the Pacific Organic Learning Farms Network, funded through the multi-donor Kiwa Initiative. The Kiwa Initiative aims to build resilience to climate change through Nature-based Solutions. A network of Organic Learning Farms (OLFs) that become learning centres for the best organic and agroecological production methods will be established and developed to foster knowledge sharing, planting materials and skills. The OLFs will significantly expand the amount of land sustainably managed, with increased biodiversity on each island. It is implemented with the Pacific Community (SPC) and Pacific Organic & Ethical Trade Community (POETCom).

Another example is the PROTÉGÉ project funded by the European Union in the Pacific French Territories. PROTÉGÉ stands for the “Projet régional océanien des territoires pour la gestion durable des écosystèmes” (Pacific Territories Regional Project for Sustainable Ecosystem Management) and has the objective to strengthen the sustainability, climate change adaptation and autonomy of key sectors and enhance ecosystem-services by protecting water resources and biodiversity. Agroecology and organic agriculture form the basis of the agriculture component of the programme.

Outlook

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 the world moves into the post-COVID era, but planning and resourcing are required to capitalize on the opportunities for a green recovery. There is an expectation that the local market for organic products will 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: https://www.organicpasifika.com/poetcom/wp-content/uploads/2022/12/COVID19-Survey-Report_POETCom.pdf
- › Pacific Organic Standard: <http://www.organicpasifika.com/poetcom/wp-content/uploads/2021/07/POS.pdf>
- › POETCom Strategic Plan: http://www.organicpasifika.com/poetcom/wp-content/uploads/2020/12/POETCom_Strategic_PlanEnglish_Final_e-copy.pdf
- › POETCom Annual Reports: <http://www.organicpasifika.com/poetcom/who-are-we/annual-reports>
- › Pacific Organic Policy Toolkit: <http://www.organicpasifika.com/pasifikapolicytoolkit>

Organic Agriculture in Oceania: Key Facts and Figures

JAN TRÁVNÍČEK,¹ BERNHARD SCHLATTER² AND HELGA WILLER³

More than 53 million hectares of farmland were organic in Oceania in 2022 – Australia had the largest area worldwide

In Oceania, over 53 million hectares of farmland were managed organically in 2022. Over 55 percent of the world's organic farmland was in Oceania.

With more than 53'016'000 hectares, the country that had the largest area of farmland under organic management in 2022 was Australia, followed by New Zealand (over 79'000 hectares), Samoa (over 47'000 hectares) and Papua New Guinea (nearly 20'000 hectares). More than 99.7 percent of Oceania's organic farmland was in Australia.

Samoa is the country with the highest organic area share in Oceania

Organic farmland in Oceania constituted 14.3 percent of the total agricultural land of the continent, which was below the global share (2.0 percent) in 2022.

The country with the highest organic area share was Samoa (16.7 percent), which was followed by Australia (14.8 percent) and Solomon Islands (6.5 percent).

Oceania's organic farmland increased by almost 77'000 hectares

Oceania's organic farmland increased by more than 17'208'000 hectares, or by 47.8 percent, from 2021 to 2022. From 2013 to 2022, Oceania's organic farmland grew by 207 percent and thus at a much faster rate than global organic farmland, mainly due to major increases in Australia.

The key crops grown are cereals, coconuts and cereals

Nearly 99 percent (over 52'540'000 hectares) of organic farmland in Oceania is permanent grassland or grazing land, mainly in Australia. Not much information is available on the use of arable land and permanent cropland.

Only a small fraction of the organic farmland (51'406 hectares) is for arable crops. The key arable crop group in 2022 was cereals (41'293 hectares). Permanent crops accounted for approximately 0.1 percent of the total organic farmland in Oceania. Among the key crops were grapes (5'783 hectares), fruits (4'567 hectares) and coffee (2'770 hectares).

Organic producers, processors and importers: 24'466 producers managing more than 53 million hectares

There were more than 24'400 organic producers in Oceania, with the highest numbers in Papua New Guinea (18'984), followed by Samoa (1'857) and Australia 1'635). Only 0.5 percent of the world's organic producers were in Oceania. Compared to 2021, 5'987

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³ Helga Willer, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org

more (32 percent increase) organic producers were counted. A total of 130 exporters and 1'756 processors were counted.

Retail sales: Data available for Australia and New Zealand

The total organic retail sales in Australia and New Zealand reached more than 1'510 million euros in 2022. In the two countries, per capita consumption of organic food products reached almost 49.0 euros per person per year in 2022.

Organic exports – almost 34'000 metric tons

Data on organic export volumes in metric tons to the European Union has been available since 2018, and data on exports to the US has been available since 2014. Data show that in 2022 over 33'557 metric tons of products were exported from Oceania to the EU and US, constituting 0.7 percent of all organic exports to these countries/trade blocks. In the 5-year period from 2018 to 2022, exports from Oceania increased by almost 16 percent, considerably faster than global organic exports to the EU and US, which grew by only 9 percent in the same period.

New Zealand is the largest exporter

The largest exporter in Oceania was New Zealand (more than 29'400 metric tons of products – more than 46 percent apples and over 32 percent kiwis), followed by Papua New Guinea (almost 2'500 metric tons, mainly coffee) and Australia (1'394 metric tons).

Apples and kiwis are the most important export product

Comprising more than 13'675 metric tons and almost two-thirds of the organic exports from Oceania, temperate fruits (exclusively apples) were the most important product group, followed by tropical and subtropical fruit (9'472 metric tons, exclusively kiwi), beverages (5'038 metric tons, mainly grape wine) and coffee (2'498 metric tons).

For more information see figures on the following pages and the data tables from page 332.

Organic Agriculture in Oceania: Graphs

Oceania: The ten countries with the largest organic agricultural area 2022

Source: FiBL survey 2024

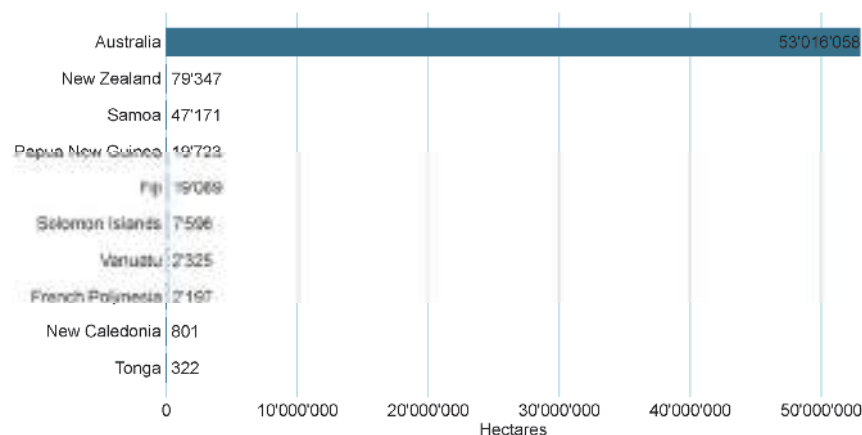


Figure 108: Oceania: The ten countries with the largest organic agricultural area 2022

Source: POETCom-FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Oceania: The ten countries with the highest organic share of total agricultural land 2022

Source: FiBL survey 2024

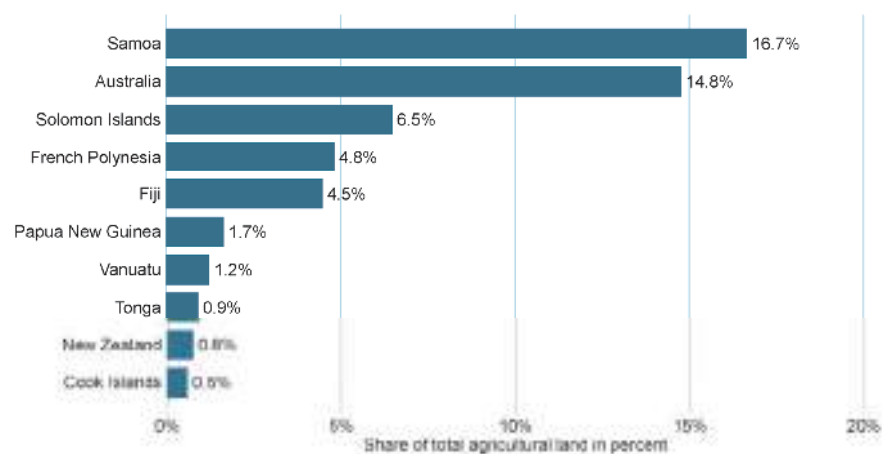


Figure 109: Oceania: The countries with the highest organic share of total agricultural land 2022

Source: POETCom-FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Oceania: Development of organic agricultural land 2000 - 2022

Source: FiBL-IFOAM-SOEL surveys 2001-2024

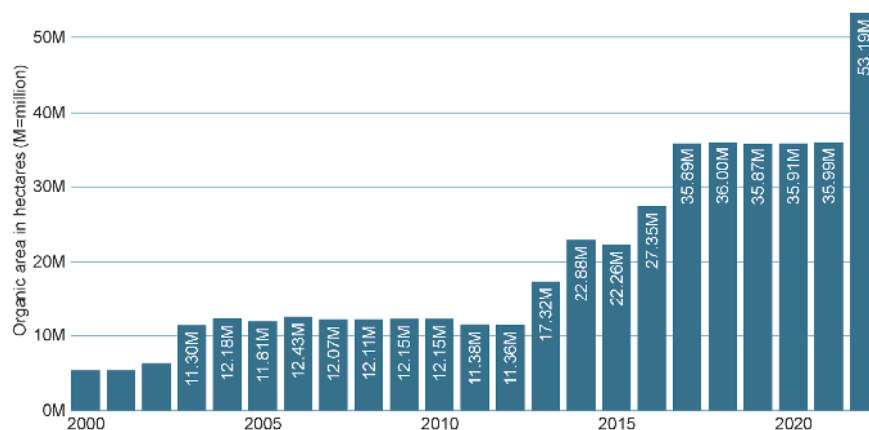


Figure I I0: Oceania: Development of organic agricultural land 2000-2022

Source: POETCom-FiBL-IFOAM-SOEL-surveys 2001-2024

Oceania: Use of organic agricultural land 2022

Source: FiBL survey 2024

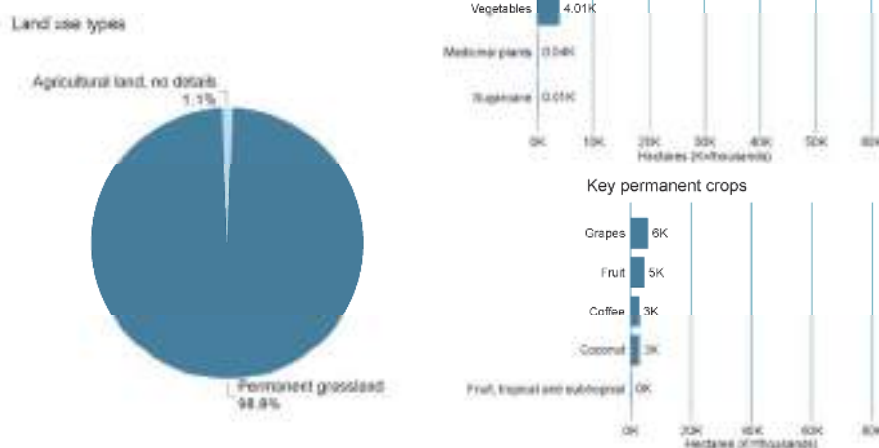


Figure I I1: Oceania: Use of organic agricultural land 2022

Source: POETCom-FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Oceania: Key commodity groups exported to the EU and US in 2022

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

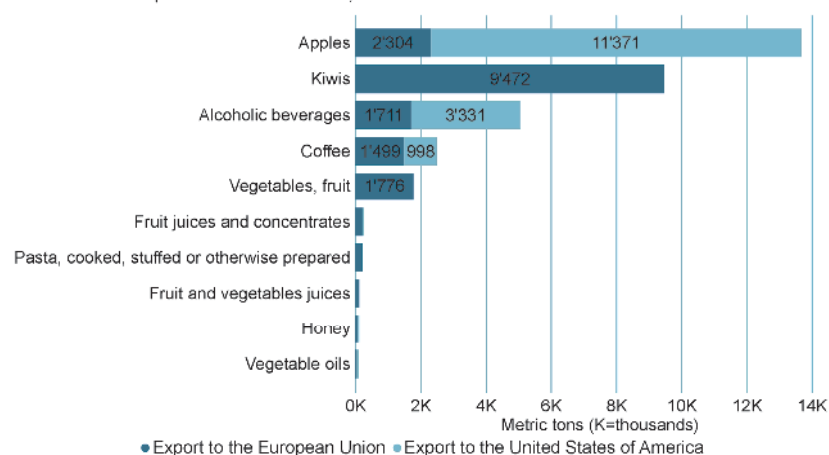


Figure I 12: Oceania: Key commodity groups exported to the EU and US

Source: GATS/USDA TRACES/European Commission. For detailed data sources, see annex, page 335.

Oceania: Key EU and US export countries in 2022

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

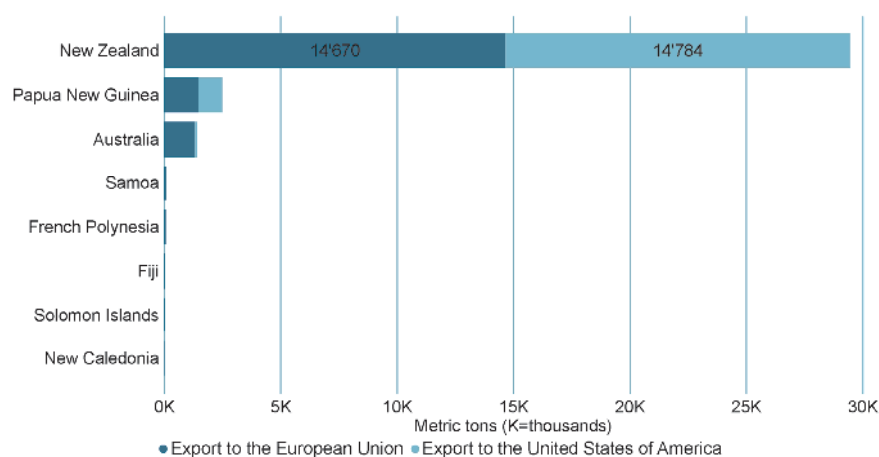


Figure I 13: Oceania: Key countries exporting to the EU and US

Source: GATS/USDA TRACES/European Commission. For detailed data sources, see annex, page 335.

Outlook

Organics for a Prosperous Future

KAREN MAPUSUA¹

As our world is being threatened by ecosystem and climate collapse, organic farming systems have shown the potential to become a real game changer. Our role as an organic movement is critical in meeting the global ambitions for limiting temperature rise and biodiversity conservation as well as protecting the livelihoods of millions of farmers. That's why our organisation will continue leading the most relevant conversations at a global scale while also connecting them with the needs of our members, the organic sector more broadly, and the policies steering the future of our food systems.

But we need to adapt and prioritise our resources to take on this challenge.

Throughout 2023, IFOAM – Organics International has designed a new strategy aimed at encouraging the widespread adoption of truly regenerative organic food and farming systems, grounded in the principles of organic agriculture: health, ecology, fairness, and care. This process was only possible thanks to the input from our community and it will unite members and allies, build new partnerships, set a global agenda and empower the organic movement to drive change around the world. Here's a short summary of our main objectives:

By empowering organic worldwide, we will

- Equip members and allies with the competencies, tools and community needed to develop and upscale organic agriculture, policies and markets worldwide.
- Enhance regional and sectoral development within our network to embrace opportunities and tackle regional and global challenges.

By leading the organic movement globally, we will

- Spearhead transformative change by positioning organic farming & food systems as a solution to global crises of climate, biodiversity, food security and inequality, and to nurture and defend the interests of all who work for this change.
- Convene inclusive conversations and build partnerships on global challenges, mobilising organic stakeholders and allies across cultures and generations.
- Define the benchmark for innovative organic standards worldwide fully embodying the organic principles.
- Innovate and support organic guarantee systems that empower farmers, farmer groups and fair local supply chains uniting farmers and consumers.

¹ Karen Mapusua, President of IFOAM - Organics International, Bonn, Germany and Director Land Resources Division, Pacific Community (SPC), Suva, Fiji

Empowering and leading the organic movement requires a robust organizational structure and sound financial footing.

By building a sustainable future for IFOAM - Organics International, we will

- Restructure membership & governance to better reflect the diversity and development of the organic movement and sector, applying the principles of subsidiarity, equity, and inclusion.
- Upskill our teams, further develop core competencies and flagship products in the interest of organic stakeholders.
- Develop a Diversity and Inclusion policy involving equitably Indigenous people, women, and youth in all procedures and governance.

We are currently developing tools and initiatives to achieve this ambitious plan and we invite our partners and members to reach out and contribute to the future of our organisation. We are also looking forward to the organic world coming together for the Organic World Congress 2024 in Taiwan. It promises to be an event of learning, sharing, innovating and community. I hope we see you there.

Annex

In the annex, we present data tables showing a breakdown of data by country. You can find the respective statistics chapters, including figures, in the following parts of the book:

- Area, page 42
- Operators, page 49
- International trade, page 53
- Retail sales, page 56
- Land use and crops, page 61
- Africa, page 142
- Asia, page 165
- Europe, page 186
- Latin America, page 222
- North America, page 244
- Oceania, page 257

Annex I: Tables

I Global data

I.1 Key indicators at a glance¹

Table 28: Key indicators by country 2022

Country/Territory	Organic area [ha]	Organic share [%]	Organic producers [no.]	Organic retail sales [Million €]	Export to EU and USA [MT]
Afghanistan	98	0.0003%			1
Albania	733	0.1%	129		1'442
Algeria	1'071	0.003%	74		1'379
Andorra	2	0.01%			
Angola		0.0%			4
Argentina	4'064'739	2.7%	1'376		285'702
Armenia	674	0.04%	33		73
Australia	53'016'058	14.8%	1'635	1'338	1'394
Austria	705'835	27.5%	26'251	2'496	313
Azerbaijan	38'080	0.8%	446		1'227
Bahamas	49	0.3%			
Bangladesh	1'400	0.02%			90
Belarus	6'159	0.1%	22		271
Belgium	101'828	7.4%	2'638	955	
Belize	508	0.3%	385		59
Benin	59'476	1.5%	9'044		14'740
Bhutan	5'608	1.1%	1'998	0	
Bolivia	117'368	0.3%	12'517		21'980
Bosnia and Herzegovina	2'495	0.1%	90	0	10'490
Brazil	996'413	0.4%	24'205	778	172'977
British Virgin Islands	26	0.4%			
Bulgaria	110'441	2.2%	4'260	38	11
Burkina Faso	91'192	0.8%	27'031		20'311
Burundi	416	0.02%	670		69
Cambodia	30'694	0.6%	7'704		12'437
Cameroon	1'556	0.02%	11		295
Canada	1'567'077	2.7%	6'503	5'800	214'091
Chad		0.0%	2'959		2'274
Channel Islands	180	2.0%			
Chile	187'101	1.2%	1'450		54'849
China	2'898'191	0.5%	15'676	12'398	199'084
Colombia	100'874	0.2%	171		264'094
Comoros	699	0.5%	2		24
Congo, Republic of		0.0%			6
Cook Islands	9	0.6%	59		
Costa Rica	12'052	0.7%	63		28'791
Côte d'Ivoire	78'783	0.4%	2'988		35'134

¹ The table on key indicators includes 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 US are listed. There are no data on intra-EU trade. See also chapter in this book on EU organic imports (page 221).

Country/Territory	Organic area [ha]	Organic share [%]	Organic producers [no.]	Organic retail sales [Million €]	Export to EU and USA [MT]
Croatia	129'374	8.6%	6'132	99	21
Cuba	2'129	0.03%	8		3'695
Cyprus	7'738	5.7%	1'292		
Czech Republic	562'395	16.0%	5'053	233	1
Congo, D.R.	116'493	0.4%	118'203		13'938
Denmark	303'093	11.5%	4'186	2'167	
Djibouti		0.0%			6
Dominica	2'907	11.6%	258		
Dominican Republic	196'572	8.1%	20'181		255'359
Ecuador	61'570	1.1%	8'460		593'219
Egypt	116'000	3.0%	970		41'368
El Salvador	2'087	0.1%	361		382
Estonia	231'011	23.4%	2'046	98	37'627
Eswatini	8'670	0.7%	1		
Ethiopia	238'146	0.6%	121'480		19'364
Falkland Islands (Malvinas)	31'937	2.8%	3		
Faroe Islands	251	8.4%	1		
Fiji	19'089	4.5%	24		24
Finland	339'460	15.0%	4'945	375	
France	2'876'052	10.0%	58'413	12'076	1'731
French Guiana (France)	3'606	11.1%	108		
French Polynesia	2'197	4.8%	60		68
Georgia	5'303	0.2%	730		810
Germany	1'859'842	11.2%	36'688	15'310	458
Ghana	71'491	0.5%	1'915		34'713
Greece	924'853	17.6%	58'691	66	2'008
Grenada	104	1.3%	2		9
Guadeloupe (France)	1'417	2.7%	242		
Guatemala	70'207	1.8%	141		14'569
Guinea		0.0%			18
Guinea-Bissau		0.0%			604
Guyana		0.0%			356
Haiti	3'777	0.2%	3'818		1'775
Honduras	66'179	2.0%	15'046		58'146
Hong Kong		0.0%			97
Hungary	293'597	5.9%	5'129	30	5
Iceland	6'440	0.4%	30		
India	4'726'715	2.6%	2'480'859	186	175'563
Indonesia	87'195	0.1%	22'709		17'932
Iran	6'817	0.01%	338		2'040
Iraq	63	0.001%			
Ireland	95'701	2.1%	2'193	235	
Israel	5'091	0.8%	336		18'587
Italy	2'349'880	17.9%	82'593	3'660	29'858
Jamaica	21	0.005%	2		0
Japan	15'319	0.3%	4'467	1'623	4'309
Jordan	1'478	0.1%	16		85
Kazakhstan	103'447	0.05%	24		30'247
Kenya	172'503	0.6%	64'156	3	12'311
Kosovo	3'089	0.7%	43		402
Kuwait	25	0.02%	1		
Kyrgyzstan	28'262	0.3%	1'001		865
Lao P.D.R.	11'545	0.5%	1'544		3'717
Latvia	302'177	15.3%	4'171	51	
Lebanon	1'466	0.2%	124		44

Annex › Global data › Key Indicators

Country/Territory	Organic area [ha]	Organic share [%]	Organic producers [no.]	Organic retail sales [Million €]	Export to EU and USA [MT]
Lesotho		0.0%	10		678
Liberia	2'762	0.1%			104
Liechtenstein	1'555	43.0%	39		
Lithuania	265'365	9.0%	3'002	51	
Luxembourg	8'255	6.2%	149	164	
Madagascar	112'644	0.3%	61'974		8'072
Malaysia	1'339	0.02%	35		15
Maldives		0.0%			577
Mali	17'840	0.04%	11'608		3'774
Malta	66	0.6%	25		
Martinique (France)	1'052	3.4%	152		
Mauritius	13	0.01%			1
Mayotte	212	1.1%	41		
Mexico	432'141	0.4%	54'638		535'728
Moldova	28'616	1.3%	139		12'211
Mongolia	933	0.001%	180	1	
Montenegro	3'966	1.5%	427		24
Morocco	18'531	0.1%	470		20'431
Mozambique	17'089	0.04%	1'652		7'734
Myanmar	10'143	0.1%	68		81
Namibia	596	0.002%	12		75
Nepal	25'776	0.6%	178		347
Netherlands	76'375	4.2%	1'985	1'435	726
New Caledonia	801	0.4%	4		0
New Zealand	79'347	0.8%	685	172	29'454
Nicaragua	30'880	0.6%	8'792		10'549
Niger		0.0%			720
Nigeria	64'252	0.1%	2'189		676
North Macedonia	8'724	0.7%	890		447
Norway	46'007	4.7%	1'974	460	
Oman	7	0.0005%	1		
Pakistan	69'850	0.2%	934		51'210
Palestine	4'830	1.0%	1'504		640
Panama	5'768	0.3%	1'066		208
Papua New Guinea	19'723	1.7%	18'984		2'499
Paraguay	116'695	0.5%	7'479		107'680
Peru	285'534	1.2%	107'868		343'960
Philippines	228'514	1.8%	14'409		17'874
Poland	509'286	3.5%	18'598	310	1
Portugal	759'977	19.1%	13'573	21	2'176
Republic of Korea	39'624	2.4%	24'906	485	222
Réunion (France)	2'201	4.6%	506		
Romania	578'718	4.3%	11'562	41	36'170
Russian Federation	187'021	0.1%	39	183	54'764
Rwanda	5'058	0.3%	9'044		1'080
Saint Lucia	20	0.2%	1		
Samoa	47'171	16.7%	1'857		100
Sao Tome and Principe	9'281	21.1%	2		4'261
Saudi Arabia	23'315	0.01%	512	325	266
Senegal	3'357	0.04%	18'372		1'895
Serbia	25'035	0.7%	513		14'386
Seychelles		0.0%	1		19
Sierra Leone	194'684	4.9%	5'507		16'623
Singapore	15	2.2%		16	20
Slovakia	162'565	8.5%	716		5

Country/Territory	Organic area [ha]	Organic share [%]	Organic producers [no.]	Organic retail sales [Million €]	Export to EU and USA [MT]
Slovenia	51'826	10.7%	3'718	49	
Solomon Islands	7'596	6.5%	957		17
Somalia		0.0%	4		33
South Africa	44'769	0.05%	1'073		34'787
Spain	2'675'331	10.9%	56'024	2'532	13'523
Sri Lanka	68'072	2.4%	128		37'568
Sudan	70'177	0.1%	2		8'447
Suriname	52	0.1%	1		62
Sweden	597'204	19.9%	5'079	2'607	46
Switzerland	186'335	17.9%	7'819	3'855	16
Syrian Arab Republic		0.0%			33
Taiwan	13'545	1.7%	4'747		121
Tajikistan	64'704	1.4%	3		
Tanzania	313'231	0.8%	61'558		6'919
Thailand	241'497	1.1%	121'540		22'935
Timor-Leste	32'311	8.5%	3		403
Togo	158'581	4.2%	19'709		160'413
Tonga	322	0.9%			
Trinidad and Tobago	108	0.2%			
Tunisia	227'582	2.3%	9'249		59'293
Türkiye	310'584	0.8%	44'927	46	164'655
Uganda	505'308	3.5%	404'246		22'038
Ukraine	263'619	0.6%	360	14	273'175
United Arab Emirates	5'419	1.4%	152		515
United Kingdom	491'300	2.8%	3'581	3'413	53'037
United States of America	2'060'741	0.5%	17'445	58'566	8'903
Uruguay	2'740'999	19.6%	1'415		5'241
Uzbekistan	2'384	0.01%	26		657
Vanuatu	2'325	1.2%	201		
Venezuela	2'496	0.01%	8		
Viet Nam	31'242	0.3%	21'346		13'693
Zambia	8'893	0.04%	6'765		309
Zimbabwe	1'450	0.01%	11'836		293
Total	96'376'196	2.0%	4'502'778	134'760	4'895'676

Source: FiBL survey 2024. Note: Agricultural land includes in-conversion areas and excludes wild collection, aquaculture, forest

1.2 Area data

Table 29: World: Organic agricultural land by country/territory (including in-conversion areas)

Country/Territory	Organic agri. land 2021 [ha]	Organic agri. land 2022 [ha]	1-year growth [ha]	10-year growth [ha]	Organic share [%]
Afghanistan	98	98	0	36	0.0003%
Albania	1'094	733	-361	218	0.1%
Algeria	772	1'071	299	372	0.003%
Andorra	2	2	0	1	0.01%
Argentina	4'074'804	4'064'739	-10'066	783'546	2.7%
Armenia	583	674	91	-326	0.04%
Australia	35'687'799	53'016'058	17'328'259	35'866'058	14.8%
Austria	679'119	705'835	26'716	147'212	27.5%
Azerbaijan	38'080	38'080	0	14'749	0.8%

Country/Territory	Organic agri. land 2021 [ha]	Organic agri. land 2022 [ha]	1-year growth [ha]	10-year growth [ha]	Organic share [%]
Bahamas	49	49	0	0	0.3%
Bangladesh	504	1'400	896	850	0.02%
Belarus	6'725	6'159	-566	6'159	0.1%
Belgium	101'828	101'828	0	39'299	7.4%
Belize	676	508	-169	-294	0.3%
Benin	48'898	59'476	10'578	57'489	1.5%
Bhutan	5'608	5'608	0	-1'118	1.1%
Bolivia	179'425	117'368	-62'057	-28'527	0.3%
Bosnia and Herzegovina	2'495	2'495	0	2'203	0.1%
Brazil	1'095'910	996'413	-99'497	393'207	0.4%
British Virgin Islands	26	26	0	26	0.4%
Bulgaria	86'310	110'441	24'131	54'154	2.2%
Burkina Faso	79'285	91'192	11'907	74'503	0.8%
Burundi	549	416	-132	-134	0.02%
Cambodia	21'112	30'694	9'582	20'805	0.6%
Cameroon	1'594	1'556	-38	894	0.02%
Canada	1'215'589	1'567'077	351'488	697'839	2.7%
Channel Islands	180	180	0	-60	2.0%
Chile	152'773	187'101	34'328	163'632	1.2%
China	2'753'700	2'898'191	144'491	804'191	0.5%
Colombia	100'874	100'874	0	69'253	0.2%
Comoros	937	699	-238	-1'943	0.5%
Cook Islands	15	9	-6	-11	0.6%
Costa Rica	10'300	12'052	1'752	4'603	0.7%
Côte d'Ivoire	78'783	78'783	0	59'520	0.4%
Croatia	121'924	129'374	7'450	88'733	8.6%
Cuba	2'129	2'129	0	-5'261	0.03%
Cyprus	7'738	7'738	0	3'435	5.7%
Czech Republic	558'124	562'395	4'271	88'164	16.0%
Congo, D.R.	89'486	116'493	27'007	64'655	0.4%
Denmark	303'093	303'093	0	133'795	11.5%
Dominica	2'907	2'907	0	2'667	11.6%
Dominican Republic	117'312	196'572	79'260	15'963	8.1%
Ecuador	52'185	61'570	9'386	18'789	1.1%
Egypt	116'000	116'000	0	30'199	3.0%
El Salvador	2'565	2'087	-477	-4'649	0.1%
Estonia	226'605	231'011	4'406	79'755	23.4%
Eswatini	3'539	8'670	5'131	8'667	0.7%
Ethiopia	332'519	238'146	-94'373	77'159	0.6%
Falkland Islands (Malvinas)	31'937	31'937	0	-371'275	2.8%
Faroe Islands	251	251	0	-2	8.4%
Fiji	30'194	19'089	-11'105	16'925	4.5%
Finland	327'736	339'460	11'724	133'290	15.0%
France	2'776'554	2'876'052	99'498	1'815'296	10.0%
French Guiana (France)	3'886	3'606	-280	904	11.1%
French Polynesia	1'592	2'197	604	-272	4.8%
Georgia	4'278	5'303	1'025	3'303	0.2%
Germany	1'802'231	1'859'842	57'611	814'887	11.2%
Ghana	32'916	71'491	38'575	43'290	0.5%
Greece	534'629	924'853	390'224	541'247	17.6%
Grenada	195	104	-91	19	1.3%
Guadeloupe (France)	1'300	1'417	117	1'224	2.7%
Guatemala	71'654	70'207	-1'447	56'827	1.8%
Haiti	2'739	3'777	1'039	899	0.2%
Honduras	66'179	66'179	0	41'229	2.0%
Hungary	293'597	293'597	0	162'579	5.9%

Country/Territory	Organic agri. land 2021 [ha]	Organic agri. land 2022 [ha]	1-year growth [ha]	10-year growth [ha]	Organic share [%]
Iceland	6'440	6'440	0	-3'270	0.4%
India	2'657'889	4'726'715	2'068'825	4'216'715	2.6%
Indonesia	83'362	87'195	3'833	21'508	0.1%
Iran	6'622	6'817	195	-5'339	0.01%
Iraq	63	63	0	23	0.001%
Ireland	86'868	95'701	8'833	42'136	2.1%
Israel	5'778	5'091	-687	-1'198	0.8%
Italy	2'186'159	2'349'880	163'721	1'032'703	17.9%
Jamaica	11	21	10	-521	0.005%
Japan	11'992	15'319	3'327	5'430	0.3%
Jordan	1'446	1'478	32	-1'420	0.1%
Kazakhstan	113'247	103'447	-9'800	-187'756	0.05%
Kenya	128'018	172'503	44'485	167'609	0.6%
Kosovo	1'990	3'089	1'099	2'975	0.7%
Kuwait	32	25	-7	25	0.02%
Kyrgyzstan	30'259	28'262	-1'996	25'406	0.3%
Lao P.D.R.	8'993	11'545	2'552	5'103	0.5%
Latvia	302'177	302'177	0	116'425	15.3%
Lebanon	1'671	1'466	-205	-1'105	0.2%
Liberia	2'791	2'762	-29	2'762	0.1%
Liechtenstein	1'423	1'555	132	418	43.0%
Lithuania	261'782	265'365	3'583	99'035	9.0%
Luxembourg	6'893	8'255	1'362	3'808	6.2%
Madagascar	95'083	112'644	17'561	82'379	0.3%
Malaysia	1'276	1'339	63	736	0.02%
Mali	17'840	17'840	0	14'113	0.04%
Malta	66	66	1	59	0.6%
Martinique (France)	706	1'052	346	783	3.4%
Mauritius	13	13	0	-3	0.01%
Mayotte	114	212	98	207	1.1%
Mexico	238'075	432'141	194'066	-69'223	0.4%
Moldova	28'368	28'616	248	6'514	1.3%
Mongolia	241	933	691	-11'990	0.001%
Montenegro	4'404	3'966	-438	898	1.5%
Morocco	11'452	18'531	7'079	9'871	0.1%
Mozambique	41'048	17'089	-23'960	3'091	0.04%
Myanmar	10'143	10'143	0	9'246	0.1%
Namibia	384	596	212	-22'490	0.002%
Nepal	2'448	25'776	23'328	16'415	0.6%
Netherlands	76'375	76'375	0	26'981	4.2%
New Caledonia	800	801	1	801	0.4%
New Zealand	79'347	79'347	0	-27'406	0.8%
Nicaragua	37'357	30'880	-6'477	-2'741	0.6%
Nigeria	58'028	64'252	6'224	64'002	0.1%
North Macedonia	7'794	8'724	930	5'578	0.7%
Norway	45'112	46'007	895	-5'655	4.7%
Oman	7	7	0	-32	0.0005%
Pakistan	69'850	69'850	0	47'453	0.2%
Palestine	5'517	4'830	-687	-1'524	1.0%
Panama	5'929	5'768	-161	-9'415	0.3%
Papua New Guinea	88'014	19'723	-68'291	-1'216	1.7%
Paraguay	113'147	116'695	3'549	54'421	0.5%
Peru	374'926	285'534	-89'392	-102'914	1.2%
Philippines	216'334	228'514	12'180	142'359	1.8%
Poland	509'286	509'286	0	-160'577	3.5%
Portugal	768'800	759'977	-8'823	562'682	19.1%

Country/Territory	Organic agri. land 2021 [ha]	Organic agri. land 2022 [ha]	1-year growth [ha]	10-year growth [ha]	Organic share [%]
Republic of Korea	40'663	39'624	-1'039	18'414	2.4%
Réunion (France)	2'100	2'201	101	1'606	4.6%
Romania	578'718	578'718	0	291'085	4.3%
Russian Federation	655'457	187'021	-468'437	42'767	0.1%
Rwanda	4'696	5'058	361	1'353	0.3%
Saint Lucia	25	20	-5	20	0.2%
Samoa	82'299	47'171	-35'128	13'656	16.7%
Sao Tome and Principe	9'291	9'281	-10	5'231	21.1%
Saudi Arabia	27'110	23'315	-3'795	-13'280	0.01%
Senegal	3'262	3'357	95	-3'572	0.04%
Serbia	23'527	25'035	1'508	16'807	0.7%
Sierra Leone	193'954	194'684	730	194'684	4.9%
Singapore	15	15	0	15	2.2%
Slovakia	162'565	162'565	0	4'717	8.5%
Slovenia	51'826	51'826	0	13'162	10.7%
Solomon Islands	8'231	7'596	-635	6'289	6.5%
South Africa	46'209	44'769	-1'440	7'303	0.05%
Spain	2'635'442	2'675'331	39'889	1'065'202	10.9%
Sri Lanka	66'623	68'072	1'449	48'555	2.4%
Sudan	960	70'177	69'217	-59'823	0.1%
Suriname	52	52	0	52	0.1%
Sweden	606'669	597'204	-9'465	96'208	19.9%
Switzerland	181'444	186'335	4'891	58'195	17.9%
Taiwan	11'765	13'545	1'780	7'609	1.7%
Tajikistan	13'513	64'704	51'192	64'606	1.4%
Tanzania	286'627	313'231	26'604	126'694	0.8%
Thailand	167'985	241'497	73'511	207'657	1.1%
Timor-Leste	32'311	32'311	0	7'621	8.5%
Togo	130'858	158'581	27'722	153'942	4.2%
Tonga	1'119	322	-796	-76	0.9%
Trinidad and Tobago		108	108	108	0.2%
Tunisia	279'389	227'582	-51'808	88'495	2.3%
Türkiye	327'583	310'584	-16'999	-150'812	0.8%
Uganda	505'308	505'308	0	275'076	3.5%
Ukraine	422'299	263'619	-158'680	-129'781	0.6%
United Arab Emirates	5'419	5'419	0	1'269	1.4%
United Kingdom	489'200	491'300	2'100	-67'418	2.8%
United States of America	2'060'741	2'060'741	0	-117'730	0.5%
Uruguay	2'741'845	2'740'999	-846	1'810'034	19.6%
Uzbekistan	4'925	2'384	-2'541	2'171	0.01%
Vanuatu	6'281	2'325	-3'956	-1'781	1.2%
Venezuela	2'496	2'496	0	2'449	0.01%
Viet Nam	74'540	31'242	-43'297	-6'248	0.3%
Zambia	3'376	8'893	5'517	8'651	0.04%
Zimbabwe	1'085	1'450	365	1'076	0.01%
World	76'108'924	96'376'196	20'267'272	53'332'674	2.0%

Table 30: World: Organic agricultural land (including in-conversion areas) by country/territory 2022 (sorted)

For an alphabetical country list, see page 271)

Country/Territory	Hectares	Country/Territory	Hectares
Australia	53'016'058	China	2'898'191
India	4'726'715	France	2'876'052
Argentina	4'064'739	Uruguay	2'740'999

Country/Territory	Hectares
Spain	2'675'331
Italy	2'349'880
United States of America	2'060'741
Germany	1'859'842
Canada	1'567'077
Brazil	996'413
Greece	924'853
Portugal	759'977
Austria	705'835
Sweden	597'204
Romania	578'718
Czech Republic	562'395
Poland	509'286
Uganda	505'308
United Kingdom	491'300
Mexico	432'141
Finland	339'460
Tanzania	313'231
Türkiye	310'584
Denmark	303'093
Latvia	302'177
Hungary	293'597
Peru	285'534
Lithuania	265'365
Ukraine	263'619
Thailand	241'497
Ethiopia	238'146
Estonia	231'011
Philippines	228'514
Tunisia	227'582
Dominican Republic	196'572
Sierra Leone	194'684
Chile	187'101
Russian Federation	187'021
Switzerland	186'335
Kenya	172'503
Slovakia	162'565
Togo	158'581
Croatia	129'374
Bolivia	117'368
Paraguay	116'695
Congo, D.R.	116'493
Egypt	116'000
Madagascar	112'644
Bulgaria	110'441
Kazakhstan	103'447
Belgium	101'828
Colombia	100'874
Ireland	95'701
Burkina Faso	91'192
Indonesia	87'195
New Zealand	79'347
Côte d'Ivoire	78'783
Netherlands	76'375
Ghana	71'491
Guatemala	70'207
Sudan	70'177
Pakistan	69'850

Country/Territory	Hectares
Sri Lanka	68'072
Honduras	66'179
Tajikistan	64'704
Nigeria	64'252
Ecuador	61'570
Benin	59'476
Slovenia	51'826
Samoa	47'171
Norway	46'007
South Africa	44'769
Republic of Korea	39'624
Azerbaijan	38'080
Timor-Leste	32'311
Falkland Islands (Malvinas)	31'937
Viet Nam	31'242
Nicaragua	30'880
Cambodia	30'694
Moldova	28'616
Kyrgyzstan	28'262
Nepal	25'776
Serbia	25'035
Saudi Arabia	23'315
Papua New Guinea	19'723
Fiji	19'089
Morocco	18'531
Mali	17'840
Mozambique	17'089
Japan	15'319
Taiwan	13'545
Costa Rica	12'052
Lao P.D.R.	11'545
Myanmar	10'143
Sao Tome and Principe	9'281
Zambia	8'893
North Macedonia	8'724
Eswatini	8'670
Luxembourg	8'255
Cyprus	7'738
Solomon Islands	7'596
Iran	6'817
Iceland	6'440
Belarus	6'159
Panama	5'768
Bhutan	5'608
United Arab Emirates	5'419
Georgia	5'303
Israel	5'091
Rwanda	5'058
Palestine	4'830
Montenegro	3'966
Haiti	3'777
French Guiana (France)	3'606
Senegal	3'357
Kosovo	3'089
Dominica	2'907
Liberia	2'762
Venezuela	2'496
Bosnia and Herzegovina	2'495

Country/Territory	Hectares	Country/Territory	Hectares
Uzbekistan	2'384	Belize	508
Vanuatu	2'325	Burundi	416
Réunion (France)	2'201	Tonga	322
French Polynesia	2'197	Faroe Islands	251
Cuba	2'129	Mayotte	212
El Salvador	2'087	Channel Islands	180
Cameroon	1'556	Trinidad and Tobago	108
Liechtenstein	1'555	Grenada	104
Jordan	1'478	Afghanistan	98
Lebanon	1'466	Malta	66
Zimbabwe	1'450	Iraq	63
Guadeloupe (France)	1'417	Suriname	52
Bangladesh	1'400	Bahamas	49
Malaysia	1'339	British Virgin Islands	26
Algeria	1'071	Kuwait	25
Martinique (France)	1'052	Jamaica	21
Mongolia	933	Saint Lucia	20
New Caledonia	801	Singapore	15
Albania	733	Mauritius	13
Comoros	699	Cook Islands	9
Armenia	674	Oman	7
Namibia	596	World*	96'376'196

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources see annex, page 335

*Total includes correction value for French overseas

Table 31: World: Organic shares of total agricultural land by country/territory 2022 (sorted)

For an alphabetical country list, see page 271.

Country/Territory	Organic share [%]	Country/Territory	Organic share [%]
Liechtenstein	43.9%	France	10.0%
Austria	27.5%	Lithuania	9.0%
Estonia	23.4%	Croatia	8.6%
Sao Tome and Principe	21.1%	Slovakia	8.5%
Sweden	19.9%	Timor-Leste	8.5%
Uruguay	19.6%	Faroe Islands	8.4%
Portugal	19.1%	Dominican Republic	8.1%
Italy	17.9%	Belgium	7.4%
Switzerland	17.9%	Solomon Islands	6.5%
Greece	17.6%	Luxembourg	6.2%
Samoa	16.7%	Hungary	5.9%
Czech Republic	16.0%	Cyprus	5.7%
Latvia	15.3%	Sierra Leone	4.9%
Finland	15.0%	French Polynesia	4.8%
Australia	14.8%	Norway	4.7%
Dominica	11.6%	Réunion (France)	4.6%
Denmark	11.5%	Fiji	4.5%
Germany	11.2%	Romania	4.3%
French Guiana (France)	11.1%	Netherlands	4.2%
Spain	10.9%	Togo	4.2%
Slovenia	10.7%	Uganda	3.5%

Country/Territory	Organic share [%]
Poland	3.5%
Martinique (France)	3.4%
Egypt	3.0%
United Kingdom	2.8%
Falkland Islands (Malvinas)	2.8%
Guadeloupe (France)	2.7%
Argentina	2.7%
Canada	2.7%
India	2.6%
Sri Lanka	2.4%
Republic of Korea	2.4%
Tunisia	2.3%
Singapore	2.2%
Bulgaria	2.2%
Ireland	2.1%
Honduras	2.0%
Channel Islands	2.0%
Philippines	1.8%
Guatemala	1.8%
Taiwan	1.7%
Papua New Guinea	1.7%
Montenegro	1.5%
Benin	1.5%
United Arab Emirates	1.4%
Tajikistan	1.4%
Grenada	1.3%
Moldova	1.3%
Vanuatu	1.2%
Peru	1.2%
Chile	1.2%
Ecuador	1.1%
Bhutan	1.1%
Thailand	1.1%
Mayotte	1.1%
Palestine	1.0%
Tonga	0.9%
Israel	0.8%
Türkiye	0.8%
Azerbaijan	0.8%
Tanzania	0.8%
New Zealand	0.8%
Burkina Faso	0.8%
Kosovo	0.7%
Serbia	0.7%
Eswatini	0.7%
North Macedonia	0.7%
Costa Rica	0.7%
Ukraine	0.6%
Ethiopia	0.6%
Nepal	0.6%
Kenya	0.6%
Malta	0.6%
Nicaragua	0.6%
Cook Islands	0.6%
Cambodia	0.6%
China	0.5%
Paraguay	0.5%

Country/Territory	Organic share [%]
Comoros	0.5%
United States of America	0.5%
Ghana	0.5%
Lao P.D.R.	0.5%
New Caledonia	0.4%
Brazil	0.4%
Iceland	0.4%
Mexico	0.4%
British Virgin Islands	0.4%
Côte d'Ivoire	0.4%
Congo, D.R.	0.4%
Bahamas	0.3%
Japan	0.3%
Bolivia	0.3%
Belize	0.3%
Rwanda	0.3%
Madagascar	0.3%
Kyrgyzstan	0.3%
Viet Nam	0.3%
Panama	0.3%
Georgia	0.2%
Lebanon	0.2%
Haiti	0.2%
Colombia	0.2%
Trinidad and Tobago	0.2%
Pakistan	0.2%
Saint Lucia	0.2%
Jordan	0.1%
Liberia	0.1%
El Salvador	0.1%
Indonesia	0.1%
Bosnia and Herzegovina	0.1%
Sudan	0.1%
Nigeria	0.1%
Russian Federation	0.1%
Myanmar	0.1%
Belarus	0.1%
Albania	0.1%
Suriname	0.1%
Morocco	0.1%
Kazakhstan	0.05%
South Africa	0.05%
Mali	0.04%
Mozambique	0.04%
Armenia	0.04%
Senegal	0.04%
Zambia	0.04%
Cuba	0.03%
Burundi	0.02%
Kuwait	0.02%
Cameroon	0.02%
Malaysia	0.02%
Bangladesh	0.02%
Iran	0.01%
Mauritius	0.01%
Saudi Arabia	0.01%
Venezuela	0.01%

Country/Territory	Organic share [%]	Country/Territory	Organic share [%]
Andorra	0.01%	Iraq	0.001%
Uzbekistan	0.01%	Oman	0.0005%
Zimbabwe	0.01%	Afghanistan	0.0003%
Jamaica	0.005%	Turks and Caicos Islands	0.0002%
Algeria	0.003%	World	2.0%
Namibia	0.002%		
Mongolia	0.001%		

Source: FiBL survey 2024, 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 335

Table 32: World: Organic areas: Agricultural land (including conversion areas) and further organic areas by country 2022

Country/Territory	Agriculture [ha]	Aqua-culture [ha]	Forest [ha]	Wild collection [ha]*	Other non-agri. land [ha]	Total [ha]
Afghanistan	98					98
Albania	733			462'459		463'192
Algeria	1'071					1'071
Andorra	2					2
Argentina	4'064'739			10'296		4'075'035
Armenia	674			754		1'428
Australia	53'016'058					53'016'058
Austria	705'835					705'835
Azerbaijan	38'080	573		2'126		40'779
Bahamas	49					49
Bangladesh	1'400					1'400
Belarus	6'159					6'159
Belgium	101'828					101'828
Belize	508					508
Benin	59'476					59'476
Bhutan	5'608			2'223		7'831
Bolivia	117'368			2'231'038		2'348'406
Bosnia and Herzegovina	2'495			195'668		198'163
Brazil	996'413		15	2'272'807		3'269'235
British Virgin Islands	26					26
Bulgaria	110'441					110'441
Burkina Faso	91'192			87'760		178'952
Burundi	416					416
Cambodia	30'694			4		30'698
Cameroon	1'556			8'000		9'556
Canada	1'567'077		2'943	163'942	47'475	1'781'438
Chad				813'136		813'136
Channel Islands	180					180
Chile	187'101			132'963		320'064
China	2'898'191			2'349'300		5'247'491
Colombia	100'874			33'750		134'624
Comoros	699					699
Cook Islands	9					9
Costa Rica	12'052					12'052
Côte d'Ivoire	78'783					78'783
Croatia	129'374					129'374
Cuba	2'129					2'129
Cyprus	7'738					7'738
Czech Republic	562'395					562'395
Congo, D.R.	116'493					116'493

Country/Territory	Agriculture [ha]	Aqua- culture [ha]	Forest [ha]	Wild collection [ha]*	Other non- agri. land [ha]	Total [ha]
Denmark	303'093					303'093
Dominica	2'907					2'907
Dominican Republic	196'572		2'198		1'198	199'968
Ecuador	61'570	138	40'007	1'574		103'290
Egypt	116'000					116'000
El Salvador	2'087					2'087
Estonia	231'011			389'724		620'735
Eswatini	8'670					8'670
Ethiopia	238'146			7'956		246'102
Falkland Islands (Malvinas)	31'937					31'937
Faroe Islands	251					251
Fiji	19'089					19'089
Finland	339'460			6'928'693		7'268'153
France	2'876'052					2'876'052
French Guiana (France)	3'606					3'606
French Polynesia	2'197					2'197
Georgia	5'303					5'303
Germany	1'859'842					1'859'842
Ghana	71'491			52'000		123'491
Greece	924'853					924'853
Grenada	104					104
Guadeloupe (France)	1'417					1'416
Guatemala	70'207			81'178		151'385
Guyana				55'449		55'449
Haiti	3'777					3'777
Honduras	66'179					66'179
Hungary	293'597					293'597
Iceland	6'440		48	454'382		460'870
India	4'726'715			4'393'151		9'119'866
Indonesia	87'195	795		144'566		232'556
Iran	6'817			4		6'821
Iraq	63					63
Ireland	95'701					95'701
Israel	5'091					5'091
Italy	2'349'880					2'349'880
Jamaica	21			7		28
Japan	15'319					15'318
Jordan	1'478					1'478
Kazakhstan	103'447					103'447
Kenya	172'503			355'530		528'033
Kosovo	3'089			1'957'052		1'960'140
Kuwait	25					25
Kyrgyzstan	28'262					28'263
Lao P.D.R.	11'545					11'545
Latvia	302'177					302'177
Lebanon	1'466			258		1'724
Lesotho				1'008'166		1'008'166
Liberia	2'762					2'762
Liechtenstein	1'555					1'555
Lithuania	265'365					265'365
Luxembourg	8'255					8'255
Madagascar	112'644		104			112'748
Malaysia	1'339					1'339
Mali	17'840			14'795		32'635
Malta	66					66

Annex › Global data › Area

Country/Territory	Agriculture [ha]	Aqua- culture [ha]	Forest [ha]	Wild collection [ha]*	Other non- agri. land [ha]	Total [ha]
Martinique (France)	1'052					1'052
Mauritius	13					13
Mayotte	212					212
Mexico	432'141		85	275'594		707'820
Moldova	28'616		1			28'618
Mongolia	933					933
Montenegro	3'966					3'966
Morocco	18'531			207'629		226'160
Mozambique	17'089			1'809'316		1'826'405
Myanmar	10'143	20				10'163
Namibia	596			2'311'657		2'312'252
Nepal	25'776			67'132		92'908
Netherlands	76'375					76'375
New Caledonia	801			60'633		61'434
New Zealand	79'347					79'347
Nicaragua	30'880					30'880
Nigeria	64'252					64'252
North Macedonia	8'724			556'600	38'146	603'470
Norway	46'007					46'007
Oman	7			2'200		2'207
Pakistan	69'850					69'850
Palestine	4'830			30	360	5'220
Panama	5'768					5'768
Papua New Guinea	19'723					19'723
Paraguay	116'695				988'604	1'105'299
Peru	285'534			244'237		529'771
Philippines	228'514					228'514
Poland	509'286					509'286
Portugal	759'977					759'976
Republic of Korea	39'624					39'624
Réunion (France)	2'201					2'201
Romania	578'718					578'718
Russian Federation	187'021			335'466		522'487
Rwanda	5'058			13		5'070
Saint Lucia	20				38	58
Samoa	47'171					47'171
Sao Tome and Principe	9'281					9'281
Saudi Arabia	23'315					23'315
Senegal	3'357			15'258		18'615
Serbia	25'035					25'035
Sierra Leone	194'684					194'685
Singapore	15					15
Slovakia	162'565					162'566
Slovenia	51'826					51'826
Solomon Islands	7'596					7'596
Somalia				252'936		252'936
South Africa	44'769		137	153'068	40	198'014
Spain	2'675'331		168'281			2'843'612
Sri Lanka	68'072					68'072
Sudan	70'177			110'610		180'787
Suriname	52					52
Sweden	597'204					597'205
Switzerland	186'335					186'335
Taiwan	13'545					13'545
Tajikistan	64'704					64'704
Tanzania	313'231		91	610		313'931

Country/Territory	Agriculture [ha]	Aqua- culture [ha]	Forest [ha]	Wild collection [ha]*	Other non- agri. land [ha]	Total [ha]
Thailand	241'497	88		90'742		332'327
Timor-Leste	32'311					32'311
Togo	158'581					158'581
Tonga	322					322
Trinidad and Tobago	108					108
Tunisia	227'582	13	71'165			298'759
Türkiye	310'584			16'004		326'588
Uganda	505'308			65		505'373
Ukraine	263'619			9'600		273'219
United Arab Emirates	5'419			2		5'421
United Kingdom	491'300		17'400			508'700
United States of America	2'060'741					2'060'741
Uruguay	2'740'999					2'740'999
Uzbekistan	2'384					2'385
Vanuatu	2'325					2'325
Venezuela	2'496					2'496
Viet Nam	31'242	46'272		923		78'437
Zambia	8'893			3'200'000		3'208'892
Zimbabwe	1'450			303'450		304'900
Total	96'376'196	47'899	302'475	34'634'487	1'075'861	132'436'914

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335; Blank cells: No data available.

*Wild collection and beekeeping areas, **Total includes correction value for French overseas departments.

1.3 Organic operators

Table 33: World: Organic producers and other operator types by country 2022

For many countries (particularly those with no private or governmental data collection system), data on the various operator types are missing or incomplete. Please note that for some countries data is compiled from several sources (i.e. several certifiers), not all of which were updated.

Country/Territory	Producers ¹	Processors	Importers	Exporters
Afghanistan		2		2
Albania	129	8		12
Algeria	74	13	1	2
Andorra		3		
Argentina	1'376	505		99
Armenia	33			
Australia	1'635	1'396		
Austria	26'251	2'374	86	1
Azerbaijan	446	446		
Bahrain		1		1
Belarus	22	7		6
Belgium	2'638	1'881	365	192
Belize	385	1		
Benin	9'044	2		11
Bhutan	1'998	227		3
Bolivia	12'517	7'619	1	233
Bosnia and Herzegovina	90	51		20
Brazil	24'205	1		

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

Annex › Global data › Operators

Country/Territory	Producers ¹	Processors	Importers	Exporters
Brunei Darussalam		1		
Bulgaria	4'260	386	101	86
Burkina Faso	27'031	28		69
Burundi	670	3		3
Cambodia	7'704	32		28
Cameroon	11	12		11
Canada	6'503	1'859		
Chad	2'959	3		3
Chile	1'450	339		88
China	15'676	5'306	282	265
Colombia	171			89
Comoros	2	9		9
Cook Islands	59			
Costa Rica	63			75
Côte d'Ivoire	2'988	14		25
Croatia	6'132	380	11	
Cuba	8	4		1
Cyprus	1'292	70	28	0
Czech Republic	5'053	971	370	175
Congo, D.R.	118'203	38		36
Denmark	4'186	1'162	101	104
Dominica	258	2		
Dominican Republic	20'181	16	55	136
Ecuador	8'460	37	13	194
Egypt	970	242		242
El Salvador	361	10		
Estonia	2'046	188	34	27
Eswatini	1			
Ethiopia	121'480			
Falkland Islands (Malvinas)	3			
Faroe Islands	1	1		
Fiji	24	6	1	2
Finland	4'945	417	53	41
France	58'413	19'311	662	
French Guiana (France)	108	15	0	
French Polynesia	60	5		4
Georgia	730	2		
Germany	36'688	21'981	1'944	1'507
Ghana	1'915	21		8
Greece	58'691	1'727	52	71
Grenada	2			
Guadeloupe (France)	242	27	2	
Guatemala	141	120	7	141
Guinea		0		3
Guyana		1		1
Haiti	3'818	1		7
Honduras	15'046	59	58	
Hong Kong		1		
Hungary	5'129	489	61	0
Iceland	30	20	8	3
India	2'480'859	1'780		
Indonesia	22'709	172		358
Iran	338	19		
Ireland	2'193	194	144	53
Israel	336	138	80	41
Italy	82'593	23'602	582	1'036
Jamaica	2			
Japan	4'467	3'361	302	
Jordan	16	7		
Kazakhstan	24	2	7	7
Kenya	64'156		1	100
Kosovo	43	39		
Kuwait	1			
Kyrgyzstan	1'001	2		3
Lao P.D.R.	1'544	2		2
Latvia	4'171	65	5	0
Lebanon	124	58	4	1
Lesotho	10			
Liechtenstein	39			

Country/Territory	Producers ¹	Processors	Importers	Exporters
Lithuania	3'002	162	1	
Luxembourg	149	217	21	0
Madagascar	61'974	171		155
Malaysia	35	28		23
Mali	11'608	1		9
Malta	25	7	34	
Martinique (France)	152	29	2	
Mauritius		5		5
Mayotte	41			
Mexico	54'638	805		
Moldova	139	23	3	40
Monaco		2		
Mongolia	180			
Montenegro	427	26	2	0
Morocco	470	332		222
Mozambique	1'652	2		1
Myanmar	68	17		17
Namibia	12			
Nepal	178			2
Netherlands	1'985	995	533	146
New Caledonia	4			
New Zealand	685	345		119
Nicaragua	8'792	47		61
Nigeria	2'189	6		3
North Macedonia	890	18	5	1
Norway	1'974	459	127	17
Oman	1			2
Pakistan	934	55		53
Palestine	1'504	42		19
Panama	1'066	3		2
Papua New Guinea	18'984	2		2
Paraguay	7'479			34
Peru	107'868			
Philippines	14'409	69		77
Poland	18'598	668	267	319
Portugal	13'573	1'358	66	36
Puerto Rico		1		
Republic of Korea	24'906	729		
Réunion (France)	506	70	13	
Romania	11'562	209	34	25
Russian Federation	39	4		
Rwanda	9'044	5		4
Saint Lucia	1			
Samoa	1'857	1		2
Sao Tome and Principe	2	1		9
Saudi Arabia	512	1		2
Senegal	18'372	20		16
Serbia	513	154	66	88
Seychelles	1	1		1
Sierra Leone	5'507	7		3
Singapore		18	1	15
Slovakia	716	119	43	5
Slovenia	3'718	157	44	0
Solomon Islands	957			
Somalia	4	1		
South Africa	1'073	30		24
Spain	56'024	5'773	498	332
Sri Lanka	128			
Sudan	2	1		
Suriname	1	1		1
Sweden	5'079	1'093	310	25
Switzerland	7'819	1'445	687	11
Taiwan	4'747			
Tajikistan	3	1		1
Tanzania	61'558	2		2
Thailand	121'540	245		
Timor-Leste	3	3		4
Togo	19'709	3		28
Tonga		1		1

Country/Territory	Producers ¹	Processors	Importers	Exporters
Tunisia	9'249	436	6	220
Türkiye	44'927	923	45	506
Uganda	404'246			
Ukraine	360	70		
United Arab Emirates	152	15		14
United Kingdom	3'581	2'566	216	
United States of America	17'445			
Uruguay	1'415	11		15
Uzbekistan	26			
Vanuatu	201			
Venezuela	8	3		1
Viet Nam	21'346	187		
Zambia	6'765			
Zimbabwe	11'836			
Total	4'502'778	119'495	8'445	8'357

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335. Total includes correction value for French overseas departments.

I.4 International Trade

Table 34: World: Exports to the EU and USA: by crop/product 2022

Crop/product	Export to EU [MT]		Export to USA [MT]	
	2021	2022	2021	2022
Fruit, tropical and subtropical	802'811	785'249	674'144	647'541
Vegetable and animal oils and fats	312'333	310'400	62'414	56'318
Oilseeds	255'556	276'795	228'607	343'806
Sugar	209'039	190'698	224'923	257'244
Cereals	163'281	152'579	220'744	294'005
Fruit, berries and nuts, prepared and preserved	171'172	148'004	23'763	24'169
Coffee	134'601	133'422	99'154	103'006
Grain mill products	116'665	116'182	22'763	26'384
Fruit, tropical and subtropical	802'811	785'249	674'144	647'541
Other	630'383	540'751	261'081	386'572
Total	2'872'948	2'726'775	1'826'034	2'168'901

Source: TRACES/European Union and GATS/USDA 2024.

Table 35: World: Organic imports to the European Union and US by country of origin 2022

Please note that this table covers only the Imports into the European Union and the United States. For the United States, it has to be stated that imports are not complete, as not all products are covered.

Country/Territory	Exports to EU [MT]	Exports to USA [MT]	Exports to EU and USA [MT]
Afghanistan		1	1
Albania	1'440	1	1'442
Algeria	1'379		1'379
Angola	4		4
Argentina	46'624	239'078	285'702
Armenia	71	3	73
Australia	1'301	93	1'394
Austria		313	313
Azerbaijan	1'227		1'227
Bangladesh	55	36	90
Belarus	271		271
Belize	59		59
Benin	14'740		14'740
Bolivia	10'702	11'278	21'980

Country/ Territory	Exports to EU [MT]	Exports to USA [MT]	Exports to EU and USA [MT]
Bosnia and Herzegovina	10'490		10'490
Brazil	65'977	106'999	172'977
Bulgaria		11	11
Burkina Faso	20'311		20'311
Burundi	69		69
Cambodia	12'162	275	12'437
Cameroon	295		295
Canada	21'172	192'919	214'091
Chad	2'274		2'274
Chile	20'878	33'971	54'849
China	194'001	5'083	199'084
Colombia	120'875	143'219	264'094
Comoros	24		24
Congo, Republic of		6	6
Costa Rica	16'122	12'670	28'791
Côte d'Ivoire	35'134		35'134
Croatia		21	21
Cuba	3'695		3'695
Czech Republic		1	1
Congo, D.R.	13'765	173	13'938
Djibouti		6	6
Dominican Republic	251'378	3'980	255'359
Ecuador	345'522	247'697	593'219
Egypt	41'296	72	41'368
El Salvador	213	169	382
Estonia		43'425	43'425
Ethiopia	13'565		13'565
European Union undefined		120	120
Fiji	24		24
France		1'731	1'731
French Polynesia	68		68
Georgia	738	72	810
Germany		458	458
Ghana	20'361	14'352	34'713
Greece		2'008	2'008
Grenada	9		9
Guatemala	3'441	11'128	14'569
Guinea		18	18
Guinea-Bissau	604		604
Guyana	356		356
Haiti	275	1'500	1'775
Honduras	38'272	19'874	58'146
Hong Kong	96	1	97
Hungary		5	5
India	139'243	36'321	175'563
Indonesia	9'494	8'438	17'932
Iran	2'040		2'040
Israel	18'045	541	18'587
Italy		29'858	29'858
Jamaica		0	0
Japan	3'851	458	4'309
Jordan	70	16	85
Kazakhstan	29'896	351	30'247
Kenya	11'868	442	12'311
Kosovo	370	33	402
Kyrgyzstan	865		865
Lao P.D.R.	3'712	6	3'717
Lebanon	23	21	44
Lesotho	678		678
Liberia	104		104
Madagascar	7'856	216	8'072
Malaysia	15		15
Maldives	577		577
Mali	3'774		3'774
Mauritius	1		1
Mexico	57'803	477'925	535'728
Moldova	12'211		12'211
Montenegro	24		24
Morocco	20'428	3	20'431
Mozambique	7'733	1	7'734
Myanmar	24	57	81
Namibia	75		75

Annex › Global data › International Trade

Country/ Territory	Exports to EU [MT]	Exports to USA [MT]	Exports to EU and USA [MT]
Nepal	337	11	347
Netherlands		726	726
New Caledonia	0		0
New Zealand	14'670	14'784	29'454
Nicaragua	4'473	6'076	10'549
Niger	720		720
Nigeria	646	31	676
North Macedonia	447		447
Pakistan	50'848	362	51'210
Palestine	640		640
Panama	193	15	208
Papua New Guinea	1'501	998	2'499
Paraguay	31'253	76'427	107'680
Peru	197'297	146'663	343'960
Philippines	17'873	1	17'874
Poland		1	1
Portugal		2'176	2'176
Republic of Korea	215	7	222
Romania		36'170	36'170
Russian Federation	9'484	45'280	54'764
Rwanda	838	241	1'080
Samoa	100		100
Sao Tome and Principe	4'261		4'261
Saudi Arabia	266		266
Senegal	1'895		1'895
Serbia	14'324	62	14'386
Seychelles	19		19
Sierra Leone	16'586	37	16'623
Singapore	20		20
Slovakia		5	5
Solomon Islands	17		17
Somalia	33		33
South Africa	34'526	261	34'787
Spain		13'523	13'523
Sri Lanka	37'271	296	37'568
Sudan	8'447		8'447
Suriname	62		62
Sweden		46	46
Switzerland	12	4	16
Syrian Arab Republic	33		33
Taiwan	106	14	121
Tanzania	5'685	1'234	6'919
Thailand	15'733	7'201	22'935
Timor-Leste	21	382	403
Togo	125'619	34'794	160'413
Tunisia	46'453	12'840	59'293
Türkiye	104'041	60'613	164'655
Uganda	20'990	1'048	22'038
Ukraine	219'125	54'051	273'175
United Arab Emirates	515		515
United Kingdom	52'915	122	53'037
United States of America	8'903		8'903
Uruguay	1'234	4'007	5'241
Uzbekistan	657		657
Viet Nam	12'979	714	13'693
Zambia	86	222	309
Zimbabwe	293		293
Total	2'726'775	2'168'901	4'895'676

Source: TRACES/European Union and GATS/USDA 2024.

Blank cells: No data available.

1.5 Organic Retail Sales

Table 36: World: Organic retail sales Retail sales, organic share of all retail sales and per capita consumption by country 2022

It should be noted that retail sales data remains problematic due to differing methods of data collection. Comments and revisions on this table should be sent to helga.willer@fibl.org.

Country	Data year	Retail sales [Million €] ¹	Organic share [%]	€/person
Australia	2022	1'338		52
Austria	2022	2'496	11.5	274
Belgium	2022	955	3.7	84
Bhutan	2018	0.03	0.3	0
Bosnia and Herzegovina	2017	0.4		0
Brazil	2016	778		4
Bulgaria	2022	38	1.0	6
Canada	2022	5'800	3.3	147
China	2022	12'398		9
Croatia	2018	99	2.2	24
Czech Republic	2021	233	1.6	22
Denmark	2022	2'167	12.0	365
Estonia	2022	98	4.6	72
Ethiopia	2015			0
Finland	2022	375	2.2	73
France	2022	12'076	6.1	176
Germany	2022	15'310	6.3	181
Greece	2021	66	0.3	6
Hungary	2015	30	0.3	3
India	2017	186		0
Ireland	2020	235	2.7	47
Italy	2022	3'660	3.6	62
Japan	2022	1'623		13
Kenya	2022	3		0
Latvia	2017	51	1.5	6
Lithuania	2017	51	1.0	18
Luxembourg	2022	164	8.2	259
Mongolia	2020	1		0
Netherlands	2022	1'435	4.4	81
New Zealand	2017		2.2	
	2020	172		34
Norway	2022	460		85
Poland	2022	310	0.6	8
Portugal	2011	21	0.2	2
Republic of Korea	2022	485		11
Romania	2016	41	0.2	2
Russian Federation	2018	183		1
Saudi Arabia	2022	325		10
Singapore	2017	16		3
Slovenia	2013	49	1.8	27
Spain	2021	2'532	2.5	55
Sweden	2022	2'607	8.2	248
Switzerland	2022	3'855	11.2	437
Türkiye	2014	46		1
Ukraine	2022	14		3
United Kingdom	2022	3'413	1.8	51
United States of America	2022	58'566	6.0	176
Total		134'760		

Source: FiBL-AMI survey 2024, based on data from government bodies, the private sector and market research companies. For data sources, see annex, page 335. Blank cells: No data available

¹ According to the Central European Bank, 1 euro corresponded to 1.0530 US dollars in 2022.

1.6 Use of organic areas: Wild collection, beehives, aquaculture and crops

1.6.1 Wild collection

Table 37: Wild collection and beekeeping areas by country 2022

Country	Land use	Area [ha]
Albania	Wild collection, no details	462'459
Argentina	Seaweed	70
	Wild collection, no details	10'226
Armenia	Wild collection, no details	754
Azerbaijan	Wild collection, no details	2'126
Bhutan	Wild collection, no details	2'223
Bolivia	Nuts, wild collection	1'072'565
	Permanent crops, wild collection, other	1
	Wild collection, no details	1'158'472
Bosnia and Herzegovina	Wild collection, no details	195'668
Brazil	Nuts, wild collection	2'272'804
	Wild collection, no details	3
Burkina Faso	Nuts, wild collection	87'760
	Seaweed	0
Cambodia	Medicinal and aromatic plants, wild collection	4
Cameroon	Nuts, wild collection	8'000
Canada	Berries, wild collection	10
	Medicinal and aromatic plants, wild collection	0
	Mushrooms, wild collection	50'003
	Nuts, wild collection	23
	Seaweed	113'863
	Wild collection, no details	43
Chad	Nuts, wild collection	577'676
	Wild collection, no details	235'460
Chile	Wild collection, no details	132'963
China	Wild collection, no details	2'349'300
Colombia	Fruit, wild collection	2'500
	Palmito, wild collection	3'250
	Wild collection, no details	28'000
Ecuador	Medicinal and aromatic plants, wild collection	547
	Mushrooms, wild collection	85
	Wild collection, no details	942
Estonia	Wild collection, no details	389'724
Ethiopia	Coffee, wild collection	7'956
Finland	Wild collection, no details	6'928'693
Ghana	Nuts, wild collection	52'000
Guatemala	Medicinal and aromatic plants, wild collection	10
	Nuts, wild collection	48
	Wild collection, no details	81'120
Guyana	Forest products	2'000
	Palmito, wild collection	53'449
Iceland	Seaweed	211'328
	Wild collection, no details	243'054
India	Wild collection, no details	4'393'151
Indonesia	Wild collection, no details	144'566
Iran	Rose hips, wild collection	4
Jamaica	Wild collection, no details	7
Kenya	Apiculture	753
	Medicinal and aromatic plants, wild collection	121'625
	Oil plants, wild collection	1'514
	Wild collection, no details	231'638
Kosovo	Berries, wild collection	745'594
	Fruit, wild collection	150'419
	Medicinal and aromatic plants, wild collection	159'045
	Rose hips, wild collection	265
	Wild collection, no details	901'730

Annex › Global data › Wild collection, Beehives and Aquaculture

Country	Land use	Area [ha]
Lebanon	Nuts, wild collection	258
Lesotho	Rose hips, wild collection	1'008'166
Mali	Nuts, wild collection	95
	Wild collection, no details	14'700
Mexico	Apiculture	5'568
	Fruit, wild collection	2'042
	Medicinal and aromatic plants, wild collection	8'426
	Wild collection, no details	259'558
Morocco	Wild collection, no details	207'629
Mozambique	Wild collection, no details	1'809'316
Namibia	Marula, wild collection	67'649
	Medicinal and aromatic plants, wild collection	2'244'008
Nepal	Medicinal and aromatic plants, wild collection	55
	Wild collection, no details	67'077
New Caledonia	Wild collection, no details	60'633
North Macedonia	Medicinal and aromatic plants, wild collection	556'600
Oman	Medicinal and aromatic plants, wild collection	2'200
Palestine	Wild collection, no details	30
Peru	Nuts, wild collection	244'237
Russian Federation	Wild collection, no details	335'466
Rwanda	Medicinal and aromatic plants, wild collection	13
Senegal	Nuts, wild collection	
	Permanent crops, wild collection, other	15'138
	Wild collection, no details	120
Somalia	Medicinal and aromatic plants, wild collection	1'931
	Wild collection, no details	251'005
South Africa	Marula, wild collection	0
	Medicinal and aromatic plants, wild collection	117'796
	Nuts, wild collection	5
	Rose hips, wild collection	34'100
	Wild collection, no details	1'168
Sudan	Wild collection, no details	110'610
Tanzania	Bee pastures	227
	Medicinal and aromatic plants, wild collection	383
Thailand	Wild collection, no details	90'742
Togo	Wild collection, no details	
Türkiye	Wild collection, no details	16'004
Uganda	Nuts, wild collection, no details	65
Ukraine	Wild collection, no details	9'600
United Arab Emirates	Medicinal and aromatic plants, wild collection	2
United States of America	Berries, wild collection	
Viet Nam	Wild collection, no details	923
Zambia	Bee pastures	2'500'000
	Fruit, wild collection	0
	Nuts, wild collection	700'000
	Wild collection, no details	0
Zimbabwe	Fruit, wild collection	23'750
	Marula, wild collection	10'700
	Medicinal and aromatic plants, wild collection	47'500
	Wild collection, no details	221'500
Total		34'634'487

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335. Please be aware that some countries may experience double counting of areas

I.6.2 Beehives

Table 38: Number of organic beehives by country 2022

Country/Territory	Area [ha]	Country/Territory	Area [ha]
Argentina	31'909	Lithuania	1'057
Armenia	1'501	Martinique (France)	75
Austria	22'192	Mayotte	1
Belarus	3'200	Mexico	448'185
Belgium	30	Moldova	7'200
Bhutan	177	Montenegro	3'381
Bosnia and Herzegovina	120	Morocco	999
Brazil	629'939	Nicaragua	20'985
Bulgaria	232'072	North Macedonia	10'072
Canada	36'912	Norway	1'861
Chile	52'400	Peru	164
China	229'084	Portugal	48'604
Croatia	2'367	Réunion (France)	74
Cyprus	184	Romania	170'789
Czech Republic	305	Russian Federation	27
Denmark	177	Saudi Arabia	10'000
Dominican Republic	9'804	Serbia	12'618
Estonia	2'899	Slovakia	251
Ethiopia	17'418	Slovenia	1'814
Finland	4'618	Spain	91'067
France	122'647	Sweden	2'182
Georgia	1'721	Switzerland	5'075
Germany	35'000	Tanzania	24'623
Guadeloupe (France)	303	Tunisia	519
Guatemala	28'454	Türkiye	95'733
Iran	4'640	Ukraine	300
Iraq	1'900	Uruguay	24'297
Italy	171'094	Zambia	757'836
Kosovo	40	Total	3'407'957
Latvia	23'541		
Lebanon	1'320		
Liechtenstein	200		

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

I.6.2 Aquaculture

Table 39: Organic aquaculture: Production volume by species 2022

Main species	Production [MT]
Aquaculture, animals, no details	204'662
Mussels	39'446
Salmon	32'070
Aquatic plants	21'815
Atlantic salmon	13'131
Sea bass	4'027
Oysters	3'202
Shrimps, aquaculture	3'067
Carps	2'837
Trout, no detail	2'346
Rainbow trout	2'070
Japanese carpet shell	1'320
Sturgeon	279

Main species	Production [MT]
European seabass	250
Seabream	223
Freshwater fishes	43
Shellfish, aquaculture	3
Total	330'789

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Table 40: Organic aquaculture: Production volume by country 2022

Country	Production [MT]
Austria	239
Bulgaria	1'600
China	140'091
Croatia	744
Czech Republic	1
Denmark	8'552
France	8'955
Germany	8'573
Greece	9'898
Hungary	1'740
Iceland	3
Ireland	34'366
Italy	23'690
Latvia	12
Lithuania	861
Netherlands	15'277
Norway	54'111
Poland	888
Romania	352
Slovenia	610
Spain	4'023
United Kingdom	13'128
Viet Nam	3'077
Total	330'789

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

1.6.4 Crops

In this edition of our yearbook, we have included exports to the EU and the US in our crop tables. Please note that discrepancies between the area numbers and the export volumes may arise because crop data from FiBL may be incomplete in some cases. This could be due to the fact that FiBL does not receive data from all certifiers, national sources might not provide complete data, or the data displayed may be older than 2022.

1.6.4.1 Cereals

Table 41: Cereals: Organic area by country 2022

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Albania	3	0.002		3		
Argentina	21'457	0.13	21'457			63'301
Australia	41'293	0.21	41'293			
Austria	141'684	18.52				1
Belarus	456	0.02	456			
Belgium	13'179	4.33	10'372	2'807		
Benin	13	0.001	13			
Bolivia	98'564	6.66	90'036	8'529	5'262	11'110
Bosnia and Herzegovina	138	0.04	138		6'831	
Brazil	525	0.002	525			
Bulgaria	12'419	0.62	8'537	7'926		
Burkina Faso	507	0.01	507		25	
Cambodia	24'516	0.72	24'516			
Canada	300'092	1.98	300'092		5'411	136'483
Chile	1'792	0.38	1'792			
China	1'464'600	1.46	1'091'200	373'400	525	21
Colombia	186	0.02	186			
Costa Rica	66	0.18				
Côte d'Ivoire	58	0.005	58			
Croatia	14'706	2.74	13'358	2'773		
Cyprus	771	2.41	645	126		
Czech Republic	46'658	3.47	39'689	6'969		
Denmark	96'683	7.07	81'693	14'990		
Ecuador	486	0.07	399	86	146	
Egypt	8'946	0.29	8'946			
Estonia	57'804	15.62	48'942	10'793		37'627
Finland	85'208	8.75	85'208			
France	436'840	4.91	319'280	117'560		13
Germany	412'000	6.78				
Ghana	342	0.02	342		3	
Greece	36'361	4.91	36'361			
Hungary	38'905	1.64	30'902	8'003		
Iceland	64	2.69	51	13		
India	40'000	0.04	40'000		1'034	257
Indonesia	98	0.001	98			
Iran	182	0.002	177	5		
Ireland	3'885	1.46	3'361	792		
Israel	797	1.04	797			
Italy	330'352	10.97	275'799	54'553		24
Japan	3'147	0.18	3'147			
Jordan	18	0.04	18			
Kazakhstan	28'943	0.18	18'881	10'062	2'136	
Kenya	272	0.01	272			
Kosovo	96	0.0	38	57		
Kuwait	1	0.06	1			
Kyrgyzstan	296	0.05	207	90		

Country	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Lao P.D.R.	1'785	0.16	1'710	75		
Latvia	65'028	8.63	57'978	7'050		
Lebanon	29	0.05	29	0		
Liechtenstein	139	0.0	139			
Lithuania	119'984	8.62	92'651	27'332		
Luxembourg	1'151	4.51	1'423	384		
Madagascar	22	0.001	22			
Mali	310	0.01	310			
Malta	2	0.0	2			
Mexico	9'617	0.10	9'617			853
Moldova	10'880	1.16	10'506	374	3'228	
Montenegro	99	4.70	99			
Morocco	467	0.01	467			
Nepal	0.3	0.00001	0			
Netherlands	4'483	2.58	4'088	395		
New Zealand		0.00				44
North Macedonia	1'649	1.04	2'212	1'074		
Norway	7'502	2.65	6'882	620		
Pakistan	38'719	0.26	38'581	138		
Palestine	15	0.06	15			
Peru	10'348	0.86	5'067	5'281	5'958	8'104
Philippines	76	0.001	76			
Poland	148'394	2.00	113'980	34'414		
Portugal	6'662	3.09	6'007	540		
Romania	130'930	2.33	93'131	37'926		36'167
Russian Federation	27'932	0.06	25'165	2'767	947	
Saudi Arabia	689	0.29	480	209		
Senegal	268	0.01	268		10	
Serbia	3'079	0.17	3'079		790	
Slovakia	25'424	2.00	19'804	5'620		
Slovenia	2'563	1.63	2'103	460		
South Africa	2'203	0.06	1'707	496	30	
Spain	242'721	4.00	193'740	38'245		
Sudan	8'582	0.09	8'582			
Sweden	121'782	12.26	113'402	8'637		
Switzerland	16'293	11.24				1
Taiwan	3'433	1.31	3'433			0
Tanzania	6'135	0.09	1'005	5'131		
Thailand	198'370	1.56				
Togo	1'444	0.12	1'444		15	
Tunisia	1'372	0.12	1'372			
Türkiye	70'843	0.66	52'303	18'540	756	
Uganda	140	0.01				
Ukraine	129'578	0.83	109'415		113'922	
United Arab Emirates	0	0.03		0		
United Kingdom	46'600	1.45	43'200	3'400	5'436	
United States of America	405'742	0.74	405'742		96	
Uruguay	671	0.09	551	120		
Uzbekistan	1	0.0001	1			
Viet Nam	1'352	0.02	862	490		
Zambia	289	0.02	270	19	19	
Total cereals	5'641'202	0.76	4'032'709	819'272	152'579	294'005

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 335.

Blank cells: No data available

16.4.2 Citrus fruit

Table 42: Citrus fruit: Organic area by country 2022

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Argentina	3'342	2.8	3'342			2'930
Benin	2	0.03	2			
Bolivia	0.1	0.0002	0			
Brazil	536	0.1	399	137	4'777	
Burkina Faso	88	36.7	88		7	
Cambodia	0.3	0.003	0			
Canada	2	0.0	2			
Chile	338	1.3	338		2'379	
China	13'000	0.4	7'000	6'000		
Colombia		0.0			7'524	
Costa Rica	16	0.1				
Côte d'Ivoire	7	0.1	7			
Croatia	24	1.2	25	18		
Cyprus	86	2.8	73	13		
Dominican Republic	86	0.2	86		760	2
Ecuador	722	2.0	708	14		
Egypt	1'303	0.7	1'303		1'296	
France	812	17.4	512	300		
French Guiana (France)	25	0.0	13	12		
French Polynesia	1	0.9	1			
Georgia	5	0.03	5			
Ghana	1'047	4.2	1'047		13	
Greece	2'136	4.7	2'136			
Grenada	0.1	0.01	0			
Guadeloupe (France)	12	0.0	3	9		
Guatemala	935	3.9	935		707	
Honduras	22	0.2	22			
Iran	18	0.01	5			
Israel	261	1.5	253	9	129	
Italy	31'218	21.5	26'718	4'500		21
Jamaica	0.02	0.0002		0		
Japan		0.0			0	
Lebanon	26	0.2	23	3		
Madagascar	44	0.3	44			
Malta	0.2	0.0	0			
Martinique (France)	4	0.0	4	0		
Mexico	21'492	3.3	21'492		253	8'491
Morocco	1'935	1.5	1'935		1'154	
Nepal	7	0.02	7			
Nicaragua	56	0.2	56			
Nigeria	46	0.01	46			
Paraguay	419	3.7	399	20		
Peru	561	0.7	428	132	4'716	
Portugal	406	1.9	327	79		
Réunion (France)	73	0.0	63	10		
Senegal	1	0.02	1			
South Africa	1'099	1.1	819	280	18'863	
Spain	25'821	8.7	17'454	6'531		325
Sri Lanka	11	0.1	11		0	
Tanzania	689	1.1	689			
Togo	3	0.1	3			
Trinidad and Tobago	1	0.03	1			
Tunisia	198	0.4	198		47	
Türkiye	708	0.4	369	339	115	
United Arab Emirates	0.1	0.02		0		
United States of America	5'477	2.0	5'477			
Viet Nam	226	0.1	204	22		
Total citrus fruit	115'346	1.1	95'073	18'427	42'740	11'769

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 335. Blank cells: No data available.

16.4.3 Cocoa beans

Table 43: Cocoa: Organic area by country 2022

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]
Belize	508	82.4	508		35
Bolivia	4'603	44.5	3'748	856	111
Brazil	284	0.05		284	14
Cameroon	361	0.1	361		24
Colombia	150	0.1	150		27
Congo, D.R.	90'540	149.0	90'540		10'869
Costa Rica	2'041	33.2			
Côte d'Ivoire	5'476	0.1	5'468	9	502
Dominica	2'907	30.4	2'816		
Dominican Republic	114'811	87.5	104'292	10'519	23'684
Ecuador	10'753	2.0	8'773	1'980	2'337
Ghana	16'482	1.1	16'175	307	958
Grenada	88	8.9	41	47	8
Guatemala	1'197	26.9	1'197		138
Haiti	2'994	73.1	2'994		275
Honduras	2'057	37.8	1'826	230	5
India		0.0			6
Indonesia	310	0.02	310		6
Liberia	2'762	3.0	2'762		104
Madagascar	6'490	52.5	6'490		2'305
Mexico	1'461	2.8	1'461		48
Nicaragua	4'044	30.2	3'433	611	381
Panama		0.0			178
Peru	52'786	28.6	35'259	17'528	7'716
Philippines	68	0.2	68		
Saint Lucia	20	153.8	20		
Sao Tome and Principe	7'077	23.0	7'077		2'248
Sierra Leone	162'498	340.3	159'926	2'572	13'795
Sri Lanka	1'220	66.8	1'220		4
Tanzania	15'244	77.7	15'244		573
Togo	1'640	22.2	1'631	9	90
Trinidad and Tobago	55	1.4	55		
Uganda	4'288	5.4			6'222
United Kingdom		0.0			14
United States of America		0.0			17
Total cocoa beans	515'214	4.4	473'843	34'951	72'694

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 335. 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 2023."¹

¹ Kemper, et al. (2023) (Eds.): The State of Sustainable Markets 2023: 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>

I.6.4.4 Coffee

Table 44: Coffee: Organic area by country 2022

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Bolivia	3'877	15.2	2'851	1'026	1'098	169
Brazil	4'636	0.3	571	65	1'750	3'682
Burundi		0.0			44	
Cameroon	552	0.5	552		33	
Canada		0.0				4'431
Chile		0.0				4
China		0.0			19	
Colombia	74'600	8.9	74'600		3'629	7'858
Congo, D.R.	19'777	14.4	19'777		2'893	173
Congo, Republic of		0.0				6
Costa Rica	439	0.5			3	843
Croatia		0.0				6
Cuba		0.0			64	
Djibouti		0.0				6
Dominican Republic	242	0.7	242		2	38
Ecuador	2'449	8.3	1'910	539	287	65
El Salvador	1'897	1.3	1'776	121	204	169
Ethiopia	174'552	25.5	138'780	1'824	8'258	5'533
France		0.0				154
Germany		0.0				333
Greece		0.0				3
Guatemala	12'520	3.4	12'520		1'773	7'102
Guinea		0.0				18
Haiti		0.0				65
Honduras	43'105	12.8	43'068	37	37'671	18'631
India	2'600	0.6	2'600		2'567	714
Indonesia	31'355	2.5	31'296	59	1'723	8'418
Israel		0.0				2
Italy		0.0				224
Jamaica	12	0.1	2			0
Japan		0.0				0
Jordan		0.0				16
Kenya	4'083	3.8	4'083		265	439
Kosovo		0.0				23
Lao P.D.R.	4'094	4.9	4'094		764	6
Lebanon		0.0				1
Madagascar	28	0.04	28			
Mexico	102'392	16.0	102'392		8'952	8'171
Myanmar	67	0.5	67			
Nepal	433	18.4	3		7	4
Netherlands		0.0				114
Nicaragua	19'516	12.4	17'876	1'639	3'249	6'055
Panama		0.0				15
Papua New Guinea	2'770	6.9	2'035	735	1'499	998
Peru	156'277	34.4	119'912	36'366	48'999	26'633
Philippines		0.0				0
Poland		0.0				0
Rwanda	811	4.5	811	0	422	241
Serbia		0.0				57
Sierra Leone	8'989	553.2	8'989		38	
South Africa		0.0				5
Spain		0.0				14
Sri Lanka	11	0.2	11		0	
Sweden		0.0				46
Switzerland		0.0			12	
Taiwan		0.0				6
Tanzania	32'481	12.1	32'174	307	2'688	96

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Thailand	1'095	2.3				1
Timor-Leste	32'311	142.8	32'311		21	382
Togo	111	0.3	111		0	
Trinidad and Tobago	5	0.1	5			
Türkiye		0.0				15
Uganda	23'103	3.3			4'455	943
United Kingdom		0.0				1
United States of America	196	6.7	196		33	
Viet Nam	39	0.01	39			9
Total coffee	761'424	6.7	655'682	42'717	133'422	103'006

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 335. 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 2023".¹

1.6.4.5 Dry pulses

Table 45: Dry pulses: Organic area by country 2022

	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Argentina	15'393	2.1	15'393		824	
Austria	11'753	63.0				
Belarus	20	0.0	20			
Belgium	471	7.9	406	65		
Bolivia	1'940	1.9	1'928	13		
Bosnia and Herzegovina	24	0.2	24			
Bulgaria	5'658	22.5	4'979			
Burkina Faso	168	0.0	168			
Canada	127'935	3.7	127'935		2'286	1'444
Chile	141	0.4	141			
China		0.0			7'989	
Costa Rica	14	0.1				
Croatia	56	2.9	122			
Czech Republic	6'468	17.3	5'312	1'156		
Denmark	18'333	68.9	15'513	2'820		
Ecuador	29	0.1	22	7		
Egypt		0.0			277	
Estonia	8'407	17.0	6'535			
Finland	8'198	20.0	8'198			
France	177'869	48.0	140'969	36'900		
Germany	53'000	27.9				
Ghana	20	0.0	20			
Greece	17'165	13.1	17'165			
Honduras	0.2	0.0001				
Hungary	3'787	31.1	3'356	431		
India	2'600	0.0	2'600		601	2'085
Iran	54	0.0	34			
Ireland	72	0.5	359			
Israel	12	0.3	12			
Italy	53'754	47.5	47'747	6'007		

¹ Kemper et al. (2023) (Eds.): The State of Sustainable Markets 2023: 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>

Annex › Global data › Crops › Dry Pulses

	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Kazakhstan	17'875	4.9	15'396	2'479	662	
Kenya	215	0.0	215			
Kuwait	0.3	0.00	0			
Kyrgyzstan	350	0.7	350			
Latvia	7'667	17.5	6'567	1'100		
Lebanon	1	0.0	1	0		
Liechtenstein	2	0.00	2			
Lithuania	19'720	14.7	15'908	3'812		
Luxembourg	81	21.2	187			
Madagascar	208	0.2	208			
Malta	0.2	0.00	0			
Mauritius	0.1	0.0	0			
Mexico	4'659	0.3	5'136		220	
Moldova	1'655	5.3	1'655		1'715	
Montenegro	2	0.4	2			
Morocco	35	0.0	35			
Namibia	31	36.5	31			
Nepal	0.1	0.00004	0			
Netherlands	276	6.7	264	12		
Nicaragua	8	0.0	8			
Norway	758	23.8	641	117		
Pakistan	3'216	0.3	3'216			
Peru	43	0.0	20	23		
Poland	58'076	18.4	42'011	16'066		
Portugal	1'742	9.2	1'441	505		
Romania	6'152	5.7	4'615	1'537		
Russian Federation	11'153	0.6	10'029	1'124	2'908	13'022
Serbia	216	1.0	216			
Slovakia	2'414	10.4	1'504	910		
Slovenia	78	5.9	68	10		
South Africa	169	0.2	169			
Spain	36'542	10.0	29'898	4'743		
Sweden	14'640	34.6	15'790			
Switzerland	1'555	33.1				
Tanzania	1'311	0.1	1'311			
Thailand		0.0			0	
Tunisia	41	0.1	41			
Türkiye	11'789	1.3	6'801	4'988	22'042	7'958
Uganda	111	0.0				
Ukraine		0.0			3'356	
United Kingdom		0.0			2	
United States of America	24'015	1.9	24'015		82	
Uzbekistan		0.0			22	
Viet Nam	155	0.1	25	130		
Zambia	3	0.0	3			
Total dry pulses	740'306	0.8	586'737	84'955	42'985	24'508

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 335.

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I.6.4.6 Fruit: Temperate Fruit

Table 46: Temperate fruit: Organic area by country 2022

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Albania	18	0.1	2	10		
Argentina	7'156	9.9	7'156		11'453	12'520
Austria	2'258	26.6				
Belarus	17	0.03	17			
Belgium	571	3.3	383	188		
Bolivia	2	0.02	2			
Bosnia and Herzegovina	2	0.002	2	0		
Bulgaria	7'255	25.8	4'808	2'706		
Canada	669	3.0	669			260
Chile	4'059	3.4	4'059		4'546	11'268
China	126'000	2.1	66'000	12'000		
Congo, D.R.	2'927	0.0	2'927			
Croatia	2'147	16.9	2'231	529		
Cyprus	201	12.7	170	31		
Czech Republic	3'401	25.1	3'113	288		
Denmark	697	29.3	607	90		
Ecuador	1	0.01	1			
Estonia	451	69.4	440	433		
Finland	61	8.5	61			
France	28'048	28.1	19'858	8'190		
Georgia	456	1.1	456			
Germany	9'238	18.7				
Greece	1'009	1.0	1'009			
Guadeloupe (France)	9	0.0	8	1		
Hungary	7'453	11.7	4'346	3'107		
Iran	170	0.05	158			
Ireland	62	8.7	62			
Israel	185	2.2	173	12		
Italy	30'354	15.2	24'694	5'660		
Jordan	144	2.3	144			
Kosovo	100	0.0	100	0		
Kyrgyzstan	238	0.5				
Latvia	1'398	32.5	1'184	213		
Lebanon	51	0.2	45	7		
Liechtenstein	2	0.0	2			
Lithuania	977	7.4	858	120		
Luxembourg	49	37.7	49			
Madagascar	2	0.02	2			
Malta	0.2	0.0	0			
Martinique (France)	49	0.0	45	3		
Mexico	323	0.3	323			
Moldova	755	0.8	600	155		
Montenegro	352	27.2	352			
Morocco	1'602	1.6	1'602	13'369		
Netherlands	664	3.8	572	92		
New Zealand		0.0			2'304	11'371
North Macedonia	250	0.8	115	135	18	
Norway	238	10.6	207	32		
Pakistan	128	0.1	128	0		
Poland	30'714	14.9	26'399	4'314		
Portugal	1'235	3.1	854	391		
Réunion (France)	25	0.0	24	1		
Romania	9'541	7.2	6'100	3'441		
Russian Federation	15	0.004		15		
Serbia	1'783	1.2	1'783		1'962	
Slovakia	527	8.9	417	110		
Slovenia	400	6.7	360	40		
South Africa	99	0.1	78	20	26	

Annex › Global data › Crops › Tropical and Subtropical Fruit

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Spain	9'293	5.0	6'921	1'749		
Sweden	394	24.0	294	105		
Switzerland	991	14.5				
Tunisia	1'053	1.8	1'053			
Türkiye	14'017	2.7	9'613	4'404	867	
United States of America	18'146	7.6	18'146			
Uzbekistan	171	0.1	162	9		
Venezuela	1'000	64.1	1'000			
Total temperate fruit	331'605	2.8	222'943	61'971	21'177	35'419

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 335.

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1.6.4.7 Fruit: Tropical and subtropical fruit

Table 47: Tropical and subtropical fruit: Organic area by country 2022

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Algeria	863	0.4	863		1'373	
Argentina	259	2.6	259		672	
Azerbaijan	450	3.3				
Benin	8	0.1	8		147	
Bolivia	2	0.002	2			
Brazil	21	0.002	21		198	22
Bulgaria	37	92.5	28			
Burkina Faso	13'930	74.4	3'042	8	5'370	
Burundi	7	0.004	7		16	
Cameroon	393	0.1	393		204	
Canada	14	359.3	14			
Chile	419	1.0	419		1'546	47
China	2'000	0.03	1'000	1'000		
Colombia	7'305	1.2	7'305		48'832	98'949
Cook Islands	9	8.0	9	0		
Congo, D.R.	7	0.001	7			
Costa Rica	5'204	4.9			3'615	341
Côte d'Ivoire	3'235	0.3	3'216	19	27'363	
Croatia	196	34.3	79	56		
Cyprus	181	21.3	143	38		
Dominican Republic	18'813	13.2	17'891	922	226'531	3'670
Ecuador	25'006	7.9	20'510	4'497	316'455	247'617
Egypt	1'802	0.7	1'802		154	
El Salvador	61	1.4	61			
Ethiopia	29'729	19.7	29'729		38	
Fiji	110	3.5	110			
France	1'845	9.4	1'285	560		
French Guiana (France)	240	0.0	199	41		
French Polynesia	53	11.3	53			
Georgia	180	247.1	180			
Ghana	879	0.2	874	5	16'726	
Greece	956	5.7	956			
Grenada	0.3	0.01	0			
Guadeloupe (France)	342	0.0	193	149		
Guatemala	969	0.8	969			205
Haiti		0.0				1'435
Honduras	204	1.1	204			134
India		0.0			24	24

Annex > Global data > Crops > Tropical and Subtropical Fruit

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Indonesia	302	0.05	302		1	
Iran	558	0.2	499	11	960	
Israel	935	2.6	823	112	1'957	
Italy	10'956	28.0	9'380	1'576		
Jordan	5	0.1	5		70	
Kenya	15'818	8.9	15'818		9'301	
Kuwait	9	0.3	9			
Lebanon	105	2.3	78	27		
Madagascar	5'361	2.4	5'361		48	
Mali	1'922	1.5	1'922		47	
Malta	0.1	0.0	0			
Martinique (France)	286	0.0	252	34		
Mauritius	2	0.3	2			
Mayotte	94	0.0	9	86		
Mexico	30'060	4.9	30'060		3'745	225'066
Montenegro	3	0.2	3			
Morocco	867	0.6	867		2'015	
Mozambique	4	0.003		4		
Nepal	10	0.01		10		
New Zealand		0.0			9'472	
Nicaragua	1'802	7.9	1'773	29		
North Macedonia	3	5.9	26	2		
Pakistan	2'454	0.6	2'454		1'115	
Palestine	15	1.0	14	1	556	
Peru	11'356	3.6	8'511	2'845	95'662	70'010
Philippines	24'532	2.2	23'593	939		
Portugal	1'347	9.1	1'118	229		
Réunion (France)	531	0.0	375	157		
Russian Federation	51	0.0		51		
Rwanda	256	0.1	256		4	
Saudi Arabia	6'000	3.8	3'967	2'033	266	
Senegal	942	4.2	942		1'041	
Serbia	0.1	0.0	0			
Slovenia	50	25.0	30	20		
South Africa	1'562	4.0	1'554	8	11	
South Africa	1'562	4.0	1'554	8	11	
Spain	9'893	12.9	6'165	2'873		
Sri Lanka	5'307	6.2	5'307		110	
Suriname	52	3.8	52			
Tanzania	1'086	0.1	1'086		1'099	
Thailand		0.0			11	
Togo	476	21.3	476		685	
Trinidad and Tobago	45	1.5	45			
Tunisia	17'066	17.1	17'066		6'919	
Türkiye	20'546	30.2	16'678	3'869	288	
Uganda	1'556	0.1			178	
United Arab Emirates		0.0			220	
United Kingdom		0.0			1	
United States of America	4'111	10.8	4'111		205	
Uzbekistan	826	16.6	826			
Viet Nam	213	0.1	153	60		20
Zimbabwe	29	0.1	29			
Total tropical and subtropical fruit	295'133	1.0	253'826	22'270	785'249	647'541

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 335.

1.6.4.8 Grapes

Table 48: Grapes: Organic area by country 2022

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]
Albania	15	0.1	5	10	
Algeria	208	0.3	208		
Andorra	2	0.0	2		
Argentina	9'838	4.7	9'838		397
Australia	5'783	4.3	888		
Austria	9'901	21.4			
Belgium	159	32.4	59	100	
Bulgaria	2'740	9.5	2'619	121	
Canada	1'424	11.6	1'424		
Chile	6'590	3.3	6'590		86
China	18'000	3.1	15'000	3'000	
Croatia	1'006	4.7	925	80	
Cyprus	223	3.3	213	10	
Czech Republic	664	4.1	485	179	
Denmark	98	0.0	58	40	
Egypt	2'157	2.5	2'157		54
Estonia	4	0.0	4		
France	157'358	20.7	90'298	67'060	
Georgia	781	1.0	494	286	
Germany	13'800	13.7			
Greece	4'716	4.5	4'716		
Hungary	1'955	3.3	1'360	595	
Iran	190	0.1	185	3	116
Israel	55	0.5	52	2	
Italy	127'638	18.1	103'576	24'062	
Jordan	7	0.2	7		
Lebanon	473	6.9	468	5	
Liechtenstein	5	0.0	5		
Lithuania	8	0.0	5	2	
Luxembourg	78	6.3	78		
Malta	9	2.1	9		
Mexico	4'301	14.0	4'301		
Moldova	93	0.1	42	51	
Netherlands	14	8.2	12	2	
North Macedonia	152	0.6	69	84	
Peru	104	0.3	7	97	68
Poland	227	25.2	183	44	
Portugal	4'000	2.3	3'919	81	
Romania	2'401	1.4	1'759	642	
Serbia	58	0.3	58		
Slovakia	382	2.5	152	230	
Slovenia	855	2.8	625	230	
South Africa	3'786	3.3	2'949	837	4'003
Spain	149'934	16.1	113'174	25'950	
Sweden	12	15.0	8	4	
Switzerland	2'468	18.5			
Türkiye	9'573	2.4	5'623	3'950	14'827
United States of America	17'111	4.7	17'111		234
Uzbekistan	146	0.1	146		53
Total grapes	561'503	8.3	391'868	127'758	19'838

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 335.

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I.6.4.9 Oilseeds

Table 49: Oilseeds: Organic area by country 2022

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Bolivia	8'312	0.5	6'923	1'389	1'360	
Bosnia and Herzegovina	29	0.2	29		2'223	
Brazil		0.0			466	
Bulgaria	15'042	1.6	5'219	6'125		
Burkina Faso	5'640	0.6	5'640		8'623	
Cambodia	1	0.0003	1			
Cameroon	39	0.01	39		1	
Canada	76'336	0.7	76'336		757	28'230
Chile		0.0			249	
China	508'000	2.3	418'000	90'000	3'744	73
Costa Rica	7	0.1				
Côte d'Ivoire		0.0			5	
Croatia	10'341	6.0	8'543	1'183		
Czech Republic	3'567	0.8	2'545	1'021		
Denmark	5'159	3.5	4'389	770		
Ecuador	417	1.0	286	131	22	
Egypt	1'740	1.5	1'740		6'712	
Estonia	10'960	14.4	12'282			
Ethiopia	13'049	1.8	5'150		660	265
Finland	4'959	19.8	4'959			
France	133'206	6.3	99'466	33'740		
Germany	43'300	4.2				
Ghana	38'120	8.2	38'120		636	14'352
Greece	5'485	5.2	5'485			
Guatemala	107	0.2	107		1	
Hungary	13'365	1.3	12'088	1'277		
Iceland	2	0.00	2			
India	87'300	0.3	87'300		6'543	11'432
Iran	28	0.01	8			
Ireland	135	1.3	39	59		
Israel	729	10.0	561	168	0	
Italy	33'941	8.6	29'865	4'076		
Japan		0.00			1	
Kazakhstan	14'441	0.5	5'990	8'451	20'898	351
Kenya	804	0.5	804		80	
Kosovo	98	0.00	97	1		
Latvia	2'454	1.7	2'174	280		
Liechtenstein	14	0.00	14			
Lithuania	13'448	4.5	9'737	3'711		
Luxembourg	18	0.6	39			
Madagascar	7'464	8.5	7'464			216
Mali	12'443	2.2	12'443		1'289	
Mexico	20'769	5.8	20'769		393	4'094
Moldova	7'652	1.7	7'294	358	4'405	
Mozambique		0.00			6	
Myanmar	576	0.02	576			
Namibia	7	0.7	7		0	
Netherlands	104	3.1	103	1		95
Nicaragua	3'929	6.9	3'913	16	101	
Nigeria	4'420	0.1	4'420		72	
North Macedonia	22	0.4	22			
Pakistan		0.00			1'876	
Paraguay	4'091	0.1	2'416	1'676	6'605	
Peru	390	7.1	360	30	222	
Poland	4'752	0.5	2'494	2'259		
Portugal	107	1.4	111			
Romania	101'375	5.8	84'130	21'131		
Russian Federation	53'398	0.3	52'204	1'195	3'386	32'258

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Senegal	117	0.01	117		15	
Serbia	2'029	0.4	2'029		1'350	
Slovakia	6'798	2.0	4'648	2'150		
Slovenia	353	3.5	293	60		
South Africa	0.03	0.000002	0			
Spain	15'781	2.1	11'784	3'067		
Sri Lanka		0.00			1	220
Sudan	19'894	0.2	5'246			
Sweden	9'566	9.5	11'453			
Switzerland	2'322	7.0				
Syrian Arab Republic		0.00			25	
Tanzania	8'894	0.3	8'894		511	1'050
Togo	135'122	69.2	135'122		120'094	34'794
Tunisia	336	2.5	336			
Türkiye	4'456	0.5	3'296	1'160	6'624	50'425
Uganda	3'837	0.4			7'922	105
Ukraine	135'238	1.5	126'607		50'286	54'032
United Kingdom		0.00			13	
United States of America	118'896	0.3	118'896		206	
Uruguay	1'883	0.2	527	1'356		2'279
Uzbekistan	1	0.001	1			
Venezuela	1'490	2.0	1'490			
Zambia	2'623	0.4	2'238	385		
Zimbabwe	84	0.03	84			
Total oilseeds	1'822'606	0.7	1'501'651	187'281	272'603	343'806

Source: FiBL survey 2024 based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 335. 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 2023."¹

1.6.4.9 Olives

Table 50: Olives: Organic area by country 2022

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
Albania	111	0.2	35	76
Argentina	7'713	6.2	7'713	
Chile	1'081	5.1	1'081	
Croatia	1'956	9.6	1'745	209
Cyprus	1'586	14.3	1'462	124
Egypt	1'103	1.1	1'103	
France	7'073	40.1	5'033	2'040
Greece	58'840	6.5	58'840	
Iran	136	0.3	133	3
Israel	498	1.8	492	6
Italy	243'089	21.2	208'212	34'877
Jordan	386	0.6	386	
Lebanon	306	0.5	292	15
Malta	14	0.0	14	
Mexico	13	0.1	13	
Montenegro	4	2.1	4	
Morocco	5'903	0.5	5'903	

¹ Kemper et al. (Eds.) (2023) The State of Sustainable Markets 2023: 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>

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]
North Macedonia	2	0.0	2	
Palestine	4'656	11.5	4'364	292
Portugal	25'633	6.8	24'195	1'438
Slovenia	296	10.2	246	50
South Africa	22	0.0	22	1
Spain	262'379	10.0	196'262	54'175
Tunisia	173'171	13.5	173'171	
Türkiye	56'014	6.4	37'085	18'929
United States of America	666	4.6	666	
Total olives	852'649	8.2	728'472	112'233

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 335
Blank cells: No data available.

1.6.4.10 Vegetables

Table 51: Vegetables: Organic area by country 2022

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Albania	1	0.002	0	0		
Argentina	1'662	1.0	1'662		3'172	1'619
Australia	3'902	5.6	3'902			
Austria	6'048	33.1				
Belarus	0.4	0.001	0			
Belgium	3'078	4.5	2'914	165		
Benin	2	0.001	2			
Bolivia	0.1	0.0002	0			
Bosnia and Herzegovina	9	0.01	9		3	
Brazil		0.00			19	
Bulgaria	1'773	7.0	884	111		
Burkina Faso		0.00			236	
Cameroon	71	0.01	71			
Canada	16'880	23.9	16'880			17'030
Chile	1'643	2.9	1'643			
China	69'400	0.3	26'800	42'600	703	43
Colombia	780	0.7	780			
Costa Rica	164	1.4				
Côte d'Ivoire	1	0.0003	1			
Croatia	186	2.2	193	18		
Cyprus	69	2.6	47	22		
Czech Republic	383	3.3	249	134		
Denmark	4'898	40.9	4'778	120		
Dominican Republic		0.00				168
Ecuador	924	1.1	909	15		9
Egypt	25'796	4.2	25'796		6'688	
Estonia	226	11.0	206	33		
Finland	1'102	9.0	1'102			
France	43'234	16.1	39'984	3'250		
French Guiana (France)	55	0.00	45	11		
Georgia	1	0.01	1		10	
Germany	17'016	13.8				
Greece	2'490	3.4	2'490			
Guadeloupe (France)	174	0.00	114	60		
Guatemala	1'102	0.8	1'102			799
Honduras	39	0.2	39			1'109
Hungary	4'372	5.1	3'521	851		
Iceland	7	10.8	7			

Annex › Global data › Crops › Vegetables

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
India		0.00			351	
Indonesia	12	0.001	12			
Iran	19	0.005	16			
Iraq	53	0.03				
Ireland	205	4.6	234	55		
Israel	774	1.0	748	26	1'290	371
Italy	59'280	14.3	49'201	10'079		
Jordan	39	0.1	39			
Kenya	9'394	2.3	9'394		29	
Kosovo	15	0.00	12	3		
Kuwait	8	0.2	8			
Kyrgyzstan	7	0.01	6	1		
Latvia	527	6.3	417	110		
Lebanon	45	0.2	45	0		
Liechtenstein	27	0.00	27			
Lithuania	887	7.1	570	317		
Luxembourg	75	41.4	95			
Madagascar	373	0.6	373			
Malaysia	161	0.2	161			
Malta	3	0.3	3			
Martinique (France)	124	0.00	109	15		
Mauritius	1	0.03	1			
Mayotte	76	0.00	44	32		
Mexico	38'401	5.7	38'401			139'068
Moldova	343	0.9	319	24		
Mongolia	188	1.7		187		
Morocco	935	0.6	935		1'933	
Mozambique	30	0.01	30			
Myanmar	50	0.01	50			
Namibia	8	0.01	8			
Nepal	163	0.04	15	40		
Netherlands	10'405	10.6	10'295	110		275
New Zealand		0.00			1'776	
Nicaragua	2	0.02	2			
Nigeria	341	0.01	341			
North Macedonia	69	0.2	32	37		
Norway	374	4.7	366	7		
Oman	2	0.01	2			
Palestine	1	0.01	1			
Peru	5'226	2.3	79	5'147	268	
Philippines	4	0.001	4			
Poland	8'240	5.5	7'334	906		
Portugal	5'613	9.5	4'821	149		
Réunion (France)	345	0.00	314	31		
Romania	1'042	0.8	713	329		
Russian Federation	52	0.01	2	50		
Rwanda	30	0.03	30			
Saudi Arabia	260	0.3	126	134		
Senegal	126	0.1	126		744	
Serbia	207	0.3	207		14	
Singapore	15	1.1	15			
Slovakia	470	4.6		470		
Slovenia	302	3.1	252	50		
South Africa	877	0.9	777	99	6'729	
Spain	25'031	6.6	20'396	3'388		101
Sweden	2'295	15.6	2'177	74		
Switzerland	3'431	23.7				
Taiwan	4'809	3.6	4'809			
Tanzania	2'420	0.6	2'420		0	
Thailand	1'681	0.3			0	
Tonga	108	1.5	108			
Tunisia	167	0.1	167		19	

Country/Territory	Organic area [ha]	Organic share [%]	Area fully converted [ha]	Area under conversion [ha]	Export to EU [MT]	Export to USA [MT]
Türkiye	1'877	0.2	1'165	711	36	
Uganda	142	0.1			0	
United Arab Emirates	58	0.7		58		
United Kingdom	9'800	5.8	8'900	1'000	413	
United States of America	97'127	14.1	97'127		0	
Uruguay	10	0.1	6	4		
Uzbekistan	26	0.01	26			
Viet Nam	619	0.1	614	5		
Zambia	80	0.1	80			
Zimbabwe	64	0.2	64			
Total vegetables	503'456	0.8	401'302	71'038	24'434	160'593

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. Export data from European Commission/Traces and USDA/GATS. For detailed data sources, see annex, page 335.

2 Tables by Regions

2.1 Organic Agriculture in Africa: Tables

Table 52: Africa: Key indicators 2022

Country	Area [ha]	Share of total agri. land [%]	Producers [no.]	Export to EU and USA [MT]
Algeria	1'071	0.003%	74	1'379
Angola		0.0%		4
Benin	59'476	1.5%	9'044	14'740
Burkina Faso	91'192	0.8%	27'031	20'311
Burundi	416	0.02%	670	69
Cameroon	1'556	0.02%	11	295
Chad		0.0%	2'959	2'274
Comoros	699	0.5%	2	24
Congo, D.R.	116'493	0.4%	118'203	13'938
Congo, Republic of		0.0%		6
Côte d'Ivoire	78'783	0.4%	2'988	35'134
Djibouti		0.0%		6
Egypt	116'000	3.0%	970	41'368
Eswatini	8'670	0.7%	1	
Ethiopia	238'146	0.6%	121'480	19'364
Ghana	71'491	0.5%	1'915	34'713
Guinea		0.0%		18
Guinea-Bissau		0.0%		604
Kenya	172'503	0.6%	64'156	12'311
Lesotho		0.0%	10	678
Liberia	2'762	0.1%		104
Madagascar	112'644	0.3%	61'974	8'072
Mali	17'840	0.04%	11'608	3'774
Mauritius	13	0.01%		1
Mayotte	212	1.1%	41	
Morocco	18'531	0.1%	470	20'431
Mozambique	17'089	0.04%	1'652	7'734
Namibia	596	0.002%	12	75
Niger		0.0%		720
Nigeria	64'252	0.1%	2'189	676
Somalia		0.0%	4	33
Réunion (France)	2'201	4.6%	506	
Rwanda	5'058	0.3%	9'044	1'080
Sao Tome and Principe	9'281	21.1%	2	4'261
Senegal	3'357	0.04%	18'372	1'895
Seychelles		0.0%	1	19
Sierra Leone	194'684	4.9%	5'507	16'623
South Africa	44'769	0.05%	1'073	34'787
Sudan	70'177	0.1%	2	8'447
Tanzania	313'231	0.8%	61'558	6'919
Togo	158'581	4.2%	19'709	160'413
Tunisia	227'582	2.3%	9'249	59'293
Uganda	505'308	3.5%	404'246	22'038
Zambia	8'893	0.04%	6'765	309
Zimbabwe	1'450	0.01%	11'836	293
Total	2'735'006	0.2%	975'334	555'231

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments; TRACES/European Commission/GATS USDA 2024. For detailed data sources, see annex, page 335.

Table 53: Africa: Land use in organic agriculture 2022

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		191'427
Arable land crops	Cereals	31'370
	Dry pulses and protein crops for the production of grain	2'314
	Fallow land	17'587
	Fallow land, crop rotation	449
	Flowers and ornamental plants	82
	Fresh vegetables and melons	41'278
	Goji berries	0
	Industrial crops	149
	Medicinal and aromatic plants	66'275
	Oilseeds	264'487
	Plants harvested green	33'217
	Root crops	66'303
	Seeds and seedlings	4
	Strawberries	890
	Sugarcane	8'519
	Textile crops	318'101
	Arable crops, other	75'332
Arable land crops total		926'357
Other agricultural land		7'524
Permanent crops	Berries	875
	Citrus fruit	6'534
	Cocoa	312'857
	Coconut	8'017
	Coffee	264'488
	Fruit	214
	Fruit of temperate climate zones	5'708
	Fruit, tropical and subtropical	98'425
	Fruit/nuts/berries	70
	Grapes	6'151
	Medicinal and aromatic plants	72'711
	Nurseries	4
	Nuts	257'737
	Oleaginous fruits	1'150
	Olives	180'199
	Tea/mate, etc.	23'279
	Permanent crops, other	365'525
Permanent crops total		1'603'945
Permanent grassland		5'752
Total		2'735'006

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Table 54: Africa: Land use in organic agriculture 2022 by country

Country	Arable land crops	Permanent crops	Permanent grassland
Algeria		1'071	
Benin	18'941	15'394	
Burkina Faso	10'641	68'644	
Burundi	409	7	
Cameroon	200	1'356	
Comoros	347	352	
Congo, D.R.	132	113'273	
Côte d'Ivoire	181	78'602	

Annex › Regions › Africa

Country	Arable land crops	Permanent crops	Permanent grassland
Egypt	96'484	19'003	459
Eswatini		8'596	73
Ethiopia	13'873	204'311	
Ghana	38'680	32'753	
Kenya	10'901	117'117	
Liberia		2'762	
Madagascar	30'789	81'750	
Mali	14'240	3'601	
Mauritius	7	6	
Mayotte	90	94	10
Morocco	6'480	10'930	
Mozambique	13'997	2'569	
Namibia	574	22	
Nigeria	56'370	419	
Réunion (France)	607	650	299
Rwanda	106	4'951	
Sao Tome and Principe		9'281	
Senegal	571	2'786	
Sierra Leone		194'685	
South Africa	13'391	23'489	4'910
Sudan	53'115	5'327	
Tanzania	255'949	57'282	
Togo	136'630	12'382	
Tunisia	28'786	195'014	
Uganda	119'436	335'030	
Zambia	3'416		
Zimbabwe	1'014	435	
Total	926'357	1'603'945	5'752

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Table 55: Africa: All organic areas 2022

Country	Agriculture [ha]	Forest [ha]	Wild collection [ha]	Other non agri. land [ha]	Total [ha]
Algeria	1'071				1'071
Benin	59'476				59'476
Burkina Faso	91'192		87'760		178'952
Burundi	416				416
Cameroon	1'556		8'000		9'556
Chad			813'136		813'136
Comoros	699				699
Côte d'Ivoire	78'783				78'783
Congo, D.R.	116'493				116'493
Egypt	116'000				116'000
Eswatini	8'670				8'670
Ethiopia	238'146		7'956		246'102
Ghana	71'491		52'000		123'491
Kenya	172'503		355'530		528'033
Lesotho			1'008'166		1'008'166
Liberia	2'762				2'762
Madagascar	112'644	104			112'748
Mali	17'840		14'795		32'635
Mauritius	13				13
Mayotte	212				212

Annex › Regions › Africa

Country	Agriculture [ha]	Forest [ha]	Wild collection [ha]	Other non agri. land [ha]	Total [ha]
Morocco	18'531		207'629		226'160
Mozambique	17'089		1'809'316		1'826'405
Namibia	596		2'311'657		2'312'253
Nigeria	64'252				64'252
Réunion (France)	2'201				2'201
Rwanda	5'058		13		5'070
Sao Tome and Principe	9'281				9'281
Senegal	3'357		15'258		18'615
Sierra Leone	194'684				194'684
Somalia			252'936		252'936
South Africa	44'769	137	153'068	40	198'014
Sudan	70'177		110'610		180'787
Tanzania	313'231	91	610		313'931
Togo	158'581				158'581
Tunisia	227'582	71'165			298'746
Uganda	505'308		65		505'373
Zambia	8'893		3'200'000		3'208'892
Zimbabwe	1'450		303'450		304'900
Total	2'735'006	71'497	10'711'955	40	13'518'498

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Please be aware that some countries may experience double counting of areas

Table 56: Africa: Use of wild collection areas 2022

Land use	Area [ha]
Bee pastures	2'500'980
Coffee, wild collection	7'956
Fruit, wild collection	23'750
Marula, wild collection	78'349
Medicinal and aromatic plants, wild collection	2'533'255
Nuts, wild collection	1'425'601
Oil plants, wild collection	1'514
Permanent crops, wild collection, other	15'138
Rose hips, wild collection	1'042'266
Seaweed	0.12
Wild collection, no details	3'098'284
Total	12'756'436

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Table 57: Africa: Organic exports to the EU and US by product group 2022

Product group	Export to EU and USA [MT]
Oilseeds	211'456
Fruit, tropical and subtropical	72'738
Vegetable and animal oils and fats	68'645
Cocoa	37'690
Coffee	26'557
Citrus fruit	21'380
Fruit, berries and nuts, prepared and preserved	20'953
Fresh vegetables and melons	16'379

Product group	Export to EU and USA [MT]
Root crops	13'153
Permanent crops, other	10'159
Non-food products	8'883
Sugar	7'540
Nuts	7'297
Vegetables, prepared and preserved	5'575
Processed and prepared fruits and vegetables	4'168
Grapes	4'057
Seeds and seedlings	3'250
Coconut	2'485
Medicinal and aromatic plants	2'317
Hot beverages (Coffee, tea and cacao etc.)	1'949
Aquaculture products	1'436
Spices and aromatics	1'232
Beverages	1'189
Medicinal and aromatic plants, permanent	1'091
Berries	961
Food additives	811
Bee products	638
Dry pulses and protein crops for the production of grain	277
Tea/mate, etc.	172
Grain mill products	166
Feedstuffs	114
Cereals	102
Prepared food, no details	73
Cocoa, chocolate and sugar confectionery, no details	72
Strawberries	72
Fruit	66
Fish and fish products	46
Cocoa, chocolate and sugar confectionery	37
Fruit of temperate climate zones	26
Other food products and product groups	7
Noodles, couscous, etc.	5
Flowers and ornamental plants	4
Inputs	2
Mushrooms, prepared and preserved	1
Seaweed	1
Sugarcane	0.2
Yeast and other single cell micro-organisms	0.1
Wild collection, other	0.03
Total	555'231

Source: TRACES/European Commission/GATS USDA 2024, compiled by FiBL. For detailed data sources, see annex, page 335. Please be aware that some countries may experience double counting of areas

2.2 Organic Agriculture in Asia: Tables

Table 58: Asia: Organic agricultural land, organic share of total agricultural land, number of organic producers and organic exports to the EU and US 2022

Country/Territory	Area [ha]	Share of total agri. land [%]	Producers [no.]	Export to EU and USA [MT]
Afghanistan	98	0.0003%		1
Armenia	674	0.04%	33	73
Azerbaijan	38'080	0.8%	446	1'227
Bangladesh	1'400	0.02%		90
Bhutan	5'608	1.1%	1'998	
Cambodia	30'694	0.6%	7'704	12'437
China	2'898'191	0.5%	15'676	199'084
Georgia	5'303	0.2%	730	810
Hong Kong		0.0%		97
India	4'726'715	2.6%	2'480'859	175'563
Indonesia	87'195	0.1%	22'709	17'932
Iran (Islamic Republic of)	6'817	0.01%	338	2'040
Iraq	63	0.001%		
Israel	5'091	0.8%	336	18'587
Japan	15'319	0.3%	4'467	4'309
Jordan	1'478	0.1%	16	85
Kazakhstan	103'447	0.05%	24	28'597
Kuwait	25	0.02%	1	
Kyrgyzstan	28'262	0.3%	1'001	865
Lao People's Democratic Republic	11'545	0.5%	1'544	3'717
Lebanon	1'466	0.2%	124	44
Malaysia	1'339	0.02%	35	15
Maldives		0.0%		577
Mongolia	933	0.001%	180	
Myanmar	10'143	0.1%	68	81
Nepal	25'776	0.6%	178	347
Oman	7	0.0005%	1	
Pakistan	69'850	0.2%	934	51'210
Palestine	4'830	1.0%	1'504	640
Philippines	228'514	1.8%	14'409	17'874
Republic of Korea	39'624	2.4%	24'906	222
Saudi Arabia	23'315	0.01%	512	266
Singapore	15	2.2%		20
Sri Lanka	68'072	2.4%	128	37'568
Syrian Arab Republic		0.0%		33
Taiwan	13'545	1.7%	4'747	121
Tajikistan	64'704	1.4%	3	
Thailand	241'497	1.1%	121'540	22'935
Timor-Leste	32'311	8.5%	3	403
United Arab Emirates	5'419	1.4%	152	515
Uzbekistan	2'384	0.01%	26	657
Viet Nam	31'242	0.3%	21'346	13'693
Total	8'830'990	0.5%	2'728'678	612'734

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments; TRACES/European Commission/GATS USDA 2024. For detailed data sources, see annex, page 335.

Table 59: Asia: Land use in organic agriculture 2022

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		4'226'661
Arable land crops	Cereals	1'807'067
	Dry pulses	24'262
	Fallow land	13'494
	Fresh vegetables and melons	78'394
	Goji berries	15
	Hops	0.05
	Medicinal and aromatic plants	81'691
	Mushrooms and truffles	13'356
	Oilseeds	611'075
	Plants harvested green	151'299
	Root crops	35'926
	Strawberries	8
	Sugarcane	7'845
	Textile crops	634'054
	Arable crops, other	39'871
Arable land crops total		3'498'356
Other agricultural land		26'081
Permanent crops	Berries	548
	Citrus fruit	13'554
	Cocoa	1'597
	Coconut	276'606
	Coffee	72'005
	Fruit	13'968
	Fruit, temperate	127'542
	Fruit, tropical and subtropical	43'901
	Fruit/nuts/berries	2'597
	Grapes	19'651
	Medicinal and aromatic plants	119'048
	Nuts	152'265
	Olives	5'982
	Tea/mate, etc.	217'750
	Permanent crops, other	4'156
Permanent crops total		1'071'170
Permanent grassland		8'720
Total		8'830'990

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Table 60: Asia: Land use in organic agriculture 2022 by country

Country/Territory	Agricultural land and crops, no details [ha]	Arable land crops [ha]	Permanent crops [ha]	Permanent grassland [ha]	Other agricultural land [ha]
Afghanistan			98		
Armenia	674				
Azerbaijan	37'630		450		
Bangladesh	1'400				
Bhutan	5'608				
Cambodia	529	29'224	941		1
China		2'307'091	591'100		
Georgia	2'573	31	2'698		
India	4'074'601	646'513	5'601		
Indonesia	11'198	206	75'791		
Iran	44	848	5'925		

Country/Territory	Agricultural land and crops, no details [ha]	Arable land crops [ha]	Permanent crops [ha]	Permanent grassland [ha]	Other agricultural land [ha]
Iraq		53	10		
Israel		2'725	1'975		392
Japan		9'026	2'054	4'038	200
Jordan	864	57	557		
Kazakhstan		99'854	96	3'240	257
Kuwait		16	9		
Kyrgyzstan		28'025	238		
Lao P.D.R.	4'955	1'785	4'805		
Lebanon		198	968	300	
Malaysia	1'115	161	63		
Mongolia	691	242	0		
Myanmar	695	676	8'772		
Nepal	23'572	353	1'850		0
Oman	4	2			
Pakistan	13'540	53'545	2'765		
Palestine	35	16	4'780		
Philippines	1'950	20'700	205'864		
Republic of Korea	39'624				
Saudi Arabia		5'216	18'099		
Singapore		15			
Sri Lanka		1'288	66'785		
Taiwan		8'242	2'355		2'948
Tajikistan		64'704			
Thailand		213'776	4'295	1'142	22'283
Timor-Leste			32'311		
United Arab Emirates	5'358	61	0		
Uzbekistan		1'187	1'198		
Viet Nam		2'524	28'718		
Total	4'226'661	3'498'356	1'071'170	8'720	26'081

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Table 61: Asia: All organic areas 2022

Country/Territory	Agriculture [ha]	Aquaculture [ha]	Wild collection [ha]	Other non agri. land [ha]	Total [ha]
Afghanistan	98				98
Armenia	674		754		1'428
Azerbaijan	38'080	573	2'126		40'779
Bangladesh	1'400				1'400
Bhutan	5'608		2'223		7'831
Cambodia	30'694		4		30'698
China	2'898'191		2'349'300		5'247'491
Georgia	5'303				5'303
India	4'726'715		4'393'151		9'119'866
Indonesia	87'195	795	144'566		232'556
Iran	6'817		4		6'821
Iraq	63				63
Israel	5'091				5'091
Japan	15'318				15'318
Jordan	1'478				1'478
Kazakhstan	103'447				103'447
Kuwait	25				25
Kyrgyzstan	28'263				28'263

Annex › Regions › Asia

Country/Territory	Agriculture [ha]	Aquaculture [ha]	Wild collection [ha]	Other non agri. land [ha]	Total [ha]
Lao P.D.R.	11'545				11'545
Lebanon	1'466		258		1'724
Malaysia	1'339				1'339
Mongolia	933				933
Myanmar	10'143	20			10'163
Nepal	25'776		67'132		92'908
Oman	7		2'200		2'207
Pakistan	69'850				69'850
Palestine	4'830		30	360	5'220
Philippines	228'514				228'514
Republic of Korea	39'624				39'624
Saudi Arabia	23'315				23'315
Singapore	15				15
Sri Lanka	68'072				68'072
Taiwan	13'545				13'545
Tajikistan	64'704				64'704
Thailand	241'497	88	90'742		332'327
Timor-Leste	32'311				32'311
United Arab Emirates	5'419		2		5'421
Uzbekistan	2'385				2'385
Viet Nam	31'242	46'272	923		78'437
Total	8'830'990	47'748	7'053'415	360	15'932'513

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335. Please be aware that some countries may experience double counting of areas

Table 62: Asia: Use of wild collection areas 2022

Land use	Area [ha]
Medicinal and aromatic plants, wild collection	2'261
Nuts, wild collection	258
Rose hips, wild collection	4
Wild collection, no details	7'050'892
Total	7'053'415

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Table 63: Asia: Organic retail sales in 2022

Country/Territory	Retail sales [Million €]	Per capita [€/person]
China	12'397.6	8.7
Japan	1'622.8	13.0
Republic of Korea	484.5	9.3
Saudi Arabia	325.2	9.0
India	185.9	0.1
Singapore	15.8	2.7
Mongolia	0.6	0.2
Bhutan	0.03	0.04
Total	15'032.4	3.2

Source: FiBL survey 2024, based on information from the private sector and governments. Please note that not all countries provided updated data. For detailed data sources, see annex, page 335.

Table 64: Asia: Organic exports to the EU and US by product group 2022

Product group	Exports to EU/and USA [MT]
Vegetable and animal oils and fats	213'656
Grain mill products	118'534
Oilseeds	48'530
Sugar	32'339
Prepared food, no details	28'377
Medicinal and aromatic plants	20'555
Fruit, berries and nuts, prepared and preserved	20'454
Processed and prepared fruits and vegetables	19'430
Coffee	14'658
Dry pulses and protein crops for the production of grain	11'358
Root crops	11'327
Nuts	7'706
Tea/mate, etc.	7'107
Bee products	6'609
Coconut	5'522
Fruit, tropical and subtropical	5'334
Non-food products	5'003
Seeds and seedlings	4'912
Hot beverages (Coffee, tea and cacao etc.)	4'312
Cereals	3'973
Fresh vegetables and melons	2'768
Medicinal and aromatic plants, permanent	2'636
Spices and aromatics	2'634
Vegetables, prepared and preserved	2'342
Aquaculture products	2'017

Product group	Exports to EU/and USA [MT]
Noodles, couscous, etc.	1'671
Food and non-food products	1'522
Feedstuffs	1'522
Protein concentrates	1'239
Textile crops	1'085
Yeast and other single cell micro-organisms	954
Other food products and product groups	817
Berries	698
Wild collection, other	574
Beverages	504
Bread and bakery products	418
Olives	249
Food additives	243
Grapes	169
Milk and dairy products	160
Citrus fruit	129
Meat and meat products	119
Mushrooms, prepared and preserved	93
Seaweed	49
Manufactured products, other	37
Cocoa	16
Fish and fish products	12
Fruit	7
Permanent crops, other	3
Fruit/nuts/berries	1
Other products	0.4
Cocoa, chocolate and sugar confectionery, no details	0.1
Flowers and ornamental plants	0.1
Total	614'384

Source: GATS/USDA and TRACES/European Commission 2024

2.3 Organic Agriculture in Europe and the European Union: Tables

Table 65: Europe: Organic agricultural land by country 2022

Please note that not for all countries 2022 data were available.

Country	Organic agr. land [ha]	Organic share [%]	Change 2021-2022 [%]	Change 2013-2022 [%]	Change 2021-2022 [ha]
Albania	733	0.1%	-33.0%	42.4%	-361
Andorra	2	0.01%	0.0%	62.3%	0
Austria	705'835	27.5%	3.9%	26.4%	26'716
Belarus	6'159	0.1%	-8.4%	0.0%	-566
Belgium	101'828	7.4%	0.0%	62.8%	0
Bosnia and Herzegovina	2'495	0.1%	0.0%	754.9%	0
Bulgaria	110'441	2.2%	28.0%	96.2%	24'131
Channel Islands	180	2.0%	0.0%	-25.0%	0
Croatia	129'374	8.6%	6.1%	218.3%	7'450
Cyprus	7'738	5.7%	0.0%	79.8%	0

Annex › Regions › Europe and the European Union

Country	Organic agr. land [ha]	Organic share [%]	Change 2021-2022 [%]	Change 2013-2022 [%]	Change 2021-2022 [ha]
Czech Republic	562'395	16.0%	0.8%	18.6%	4'271
Denmark	303'093	11.5%	0.0%	79.0%	0
Estonia	231'011	23.4%	1.9%	52.7%	4'406
Faroe Islands	251	8.4%	0.0%	-0.8%	0
Finland	339'460	15.0%	3.6%	64.7%	11'724
France	2'876'052	10.0%	3.6%	171.1%	99'498
Germany	1'859'842	11.2%	3.2%	78.0%	57'611
Greece	924'853	17.6%	73.0%	141.1%	390'224
Hungary	293'597	5.9%	0.0%	124.1%	0
Iceland	6'440	0.4%	0.0%	-33.7%	0
Ireland	95'701	2.1%	10.2%	78.7%	8'833
Italy	2'349'880	17.9%	7.5%	78.4%	163'721
Kosovo	3'089	0.7%	55.2%	2607.0%	1'099
Latvia	302'177	15.3%	0.0%	62.7%	0
Liechtenstein	1'555	43.0%	9.3%	36.8%	132
Lithuania	265'365	9.0%	1.4%	59.5%	3'583
Luxembourg	8'255	6.2%	19.8%	85.6%	1'362
Malta	66	0.6%	1.3%	851.4%	1
Moldova	28'616	1.3%	0.9%	29.5%	248
Montenegro	3'966	1.5%	-9.9%	29.3%	-438
Netherlands	76'007	4.2%	0.0%	54.6%	0
North Macedonia	8'724	0.7%	11.9%	177.3%	930
Norway	46'007	4.7%	2.0%	-10.9%	895
Poland	509'286	3.5%	0.0%	-24.0%	0
Portugal	759'977	19.1%	-1.1%	285.2%	-8'823
Romania	578'718	4.3%	0.0%	101.2%	0
Russian Federation	187'021	0.1%	-71.5%	29.6%	-468'437
Serbia	25'035	0.7%	6.4%	204.3%	1'508
Slovakia	162'565	8.5%	0.0%	3.0%	0
Slovenia	51'826	10.7%	0.0%	34.0%	0
Spain	2'675'331	10.9%	1.5%	66.2%	39'889
Sweden	597'204	19.9%	-1.6%	19.2%	-9'465
Switzerland	186'335	17.9%	2.7%	45.4%	4'891
Türkiye	310'584	0.8%	-5.2%	-32.7%	-16'999
Ukraine	263'619	0.6%	-37.6%	-33.0%	-158'680
United Kingdom	491'300	2.8%	0.4%	-12.1%	2'100
Total Europe	18'450'355	3.7%	1.0%	62.3%	191'452
Total EU	16'878'245	10.4%	5.1%	76.1%	825'131

Source: FiBL-AMI survey 2024 based on Eurostat and national data sources. For detailed data sources, see annex, page 335.

Table 66: Europe: Conversion status of organic agricultural land 2022

Please note that not for all countries and for all indicators 2022 data were available.

Country	Organic area [ha]	Area fully converted [ha]	Area under conversion [ha]
Albania	733	570	163
Andorra	2	2	
Austria	705'835		
Belarus	6'159	2'097	4'062
Belgium	101'828	85'525	13'547
Bosnia and Herzegovina	2'495	2'082	413
Bulgaria	110'441	60'460	49'981
Channel Islands	180	180	
Croatia	129'374	92'959	36'415

County	Organic area [ha]	Area fully converted [ha]	Area under conversion [ha]
Cyprus	7'738	5'419	2'318
Czech Republic	562'395	512'863	49'531
Denmark	303'093	265'033	38'060
Estonia	231'011	210'623	20'389
Faroe Islands	251	251	
Finland	339'460	307'886	31'573
France	2'876'052	2'191'359	584'617
Germany	1'859'842		
Greece	924'853	600'613	324'240
Greenland			
Hungary	293'597	262'906	30'691
Iceland	6'440	4'502	1'938
Ireland	95'701	69'712	25'989
Italy	2'349'880	1'843'473	506'408
Kosovo	3'089	2'994	94
Latvia	302'177	261'471	40'706
Liechtenstein	1'555	1'555	0
Lithuania	265'365	205'067	60'298
Luxembourg	8'255	6'864	1'390
Malta	66	65	1
Moldova	28'616	26'848	1'768
Montenegro	3'966	3'781	185
Netherlands	76'375	71'281	5'093
North Macedonia	8'724	6'594	2'130
Norway	46'007	41'677	4'329
Poland	509'286	400'849	108'437
Portugal	759'977	268'973	491'004
Romania	578'718	344'541	234'177
Russian Federation	187'021	164'042	23'090
Serbia	25'035	16'503	8'533
Slovakia	162'565	118'876	43'688
Slovenia	51'826	44'761	7'066
Spain	2'675'331	2'041'057	485'709
Sweden	597'204	563'799	33'405
Switzerland	186'335		
Türkiye	310'584	215'361	95'223
Ukraine	263'619	246'126	17'493
United Kingdom	491'300	452'200	39'200
Europe	18'450'355	12'023'802	3'423'354
European Union	16'878'245	10'836'436	3'224'733

Source: FiBL-AMI survey 2024 based on Eurostat and national data sources. For detailed data sources, see annex, page 335.

Table 67: Europe: Land use in organic agriculture by country 2022

Please note that not for all countries 2022 data were available.

Country	Arable land [ha]	Permanent grassland [ha]	Permanent crops [ha]	Total [ha]
Albania	580		153	733
Andorra			2	2
Austria	290'746	399'814	15'214	705'835
Belarus	1'463		62	6'159
Belgium	35'920	61'644	1'507	101'828
Bosnia and Herzegovina	1'532		159	2'495
Bulgaria	57'992	29'856	22'593	110'441
Channel Islands				180
Croatia	49'068	62'591	17'715	129'374
Cyprus	4'506	184	3'048	7'738
Czech Republic	102'309	455'453	4'632	562'395
Denmark	251'798	47'637	3'658	303'093
Estonia	135'767	92'759	2'485	231'011
Faroe Islands		251		251
Finland	290'525		669	339'460
France	1'589'609	962'038	224'024	2'876'052
Germany	834'000	995'000	26'970	1'859'842
Greece	382'153	332'720	209'981	924'853
Greenland				
Hungary	100'173	179'586	13'838	293'597
Iceland	218	6'194	27	6'440
Ireland	11'416	84'164	121	95'701
Isle of Man				
Italy	1'128'912	662'252	558'716	2'349'880
Kosovo	2'720		277	3'089
Latvia	160'777	137'520	3'880	302'177
Liechtenstein	289	1'252	8	1'555
Lithuania	160'516	100'586	4'262	265'365
Luxembourg	3'533	4'570	152	8'255
Malta	41		24	66
Moldova	21'887		6'459	28'616
Montenegro	286	3'134	546	3'966
Netherlands	31'261	44'146	968	76'375
North Macedonia	4'592	3'376	755	8'724
Norway	10'067	34'334	358	46'007
Poland	375'930	85'741	47'615	509'286
Portugal	148'644	422'371	188'962	759'976
Romania	338'942	214'657	21'233	578'718
Russian Federation	98'137	24	67	187'021
Serbia	19'412		5'623	25'035
Slovakia	84'907	75'408	2'251	162'566
Slovenia	7'303	40'926	3'597	51'826
Spain	574'116	1'291'257	809'958	2'675'331
Sweden	460'387	136'085	732	597'205
Switzerland	46'444	132'917	4'039	186'335
Türkiye	132'351		156'861	310'584
Ukraine	264'816			263'619
United Kingdom	167'500	310'800	2'400	491'300
Total Europe	8'383'545	7'411'249	2'366'600	18'450'355
Total EU	7'611'251	6'918'966	2'188'804	16'878'245

Source: FiBL-AMI survey 2024 based on Eurostat and national data sources. For detailed data sources, see annex, page 335. 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 2022

Please note that not for all countries 2022 data were available.

Country	Agricultural land [ha]	Wild collection [ha]	Total [ha]
Albania	733	462'459	463'192
Andorra	2		2
Austria	705'835		705'835
Belarus	6'159		6'159
Belgium	101'828		101'828
Bosnia and Herzegovina	2'495	195'668	198'163
Bulgaria	110'441		110'441
Channel Islands	180		180
Croatia	129'374		129'374
Cyprus	7'738		7'738
Czech Republic	562'395		562'395
Denmark	303'093		303'093
Estonia	231'011	389'724	620'735
Faroe Islands	251		251
Finland	339'460	6'928'693	7'268'153
France	2'876'052		2'876'052
Germany	1'859'842		1'859'842
Greece	924'853		924'853
Greenland			
Hungary	293'597		293'597
Iceland	6'440	454'382	460'822
Ireland	95'701		95'701
Italy	2'349'880		2'349'880
Kosovo	3'089	1'957'052	1'960'140
Latvia	302'177		302'177
Liechtenstein	1'555		1'555
Lithuania	265'365		265'365
Luxembourg	8'255		8'255
Malta	66		66
Moldova	28'616		28'616
Montenegro	3'966		3'966
Netherlands	76'375		76'375
North Macedonia	8'724	556'600	565'324
Norway	46'007		46'007
Poland	509'286		509'286
Portugal	759'976		759'976
Romania	578'718		578'718
Russian Federation	187'021	335'466	522'487
Serbia	25'035		25'035
Slovakia	162'566		162'566
Slovenia	51'826		51'826
Spain	2'675'331		2'675'331
Sweden	597'205		597'205
Switzerland	186'335		186'335
Türkiye	310'584	16'004	326'588
Ukraine	263'619	9'600	273'219
United Kingdom	491'300		491'300
Europe	18'450'355	11'305'648	29'756'003
European Union	16'878'245	7'318'417	24'196'662

Source: FiBL-AMI survey 2024 based on Eurostat and national data sources. For detailed data sources, see annex, page 335. Please be aware that some countries may experience double counting of areas

Table 69: Europe: Organic producers, processors, and importers by country 2022

Please note that not for all countries 2022 data were available.

Country	Producers	Processors	Importers	Exporters
Albania	129	8		12
Andorra		3		
Austria	26'251	2'374	86	1
Belarus	22	7		6
Belgium	2'638	1'881	365	192
Bosnia and Herzegovina	90	51		20
Bulgaria	4'260	386	101	86
Croatia	6'132	380	11	
Cyprus	1'292	70	28	0
Czech Republic	5'053	971	370	175
Denmark	4'186	1'162	101	104
Estonia	2'046	188	34	27
Faroe Islands	1	1		
Finland	4'945	417	53	41
France	58'413	19'311	662	
Germany	36'688	21'981	1'944	1'507
Greece	58'691	1'727	52	71
Hungary	5'129	489	61	0
Iceland	30	20	8	3
Ireland	2'193	194	144	53
Italy	82'593	23'602	582	1'036
Kosovo	43	39		
Latvia	4'171	65	5	0
Liechtenstein	39			
Lithuania	3'002	162	1	
Luxembourg	149	217	21	0
Malta	25	7	34	
Moldova	139	23	3	40
Monaco		2		
Montenegro	427	26	2	0
Netherlands	1'985	995	533	146
North Macedonia	890	18	5	1
Norway	1'974	459	127	17
Poland	18'598	668	267	319
Portugal	13'573	1'358	66	36
Romania	11'562	209	34	25
Russian Federation	39	4		
Serbia	513	154	66	88
Slovakia	716	119	43	5
Slovenia	3'718	157	44	0
Spain	56'024	5'773	498	332
Sweden	5'079	1'093	310	25
Switzerland	7'819	1'445	687	11
Türkiye	44'927	923	45	506
Ukraine	360	70		
United Kingdom	3'581	2'566	216	
Europe	480'135	91'775	7'609	4'885
European Union	419'112	85'956	6'450	4'181

Source: FiBL-AMI survey 2024 based on Eurostat and national data sources. For detailed data sources, see annex, page 335.

*Total number includes data for countries with less than three operators.

Table 70: Europe and European Union: Organic retail sales 2022*

Country	Data year**	Retail sales [Million €]	€/person [€]	Organic share [%]	1-year growth [%]	Food-service [Million €]
Austria	2022	2'496.0	274.1	11.5	4.1	191.0
Belgium	2022	955.1	84.3	3.7	-2.5	
Bosnia and Herzegovina	2017	0.4	0.1			
Bulgaria	2022	37.8	5.9	1.0	3.2	
Croatia	2018	99.3	24.2	2.2		
Czech Republic	2021	232.8	22.1	1.6		7.2
	2020					
Denmark	2022	2'167.0	365.3	12.0	-3.2	401.0
Estonia	2022	98.0	72.0	4.6	6.0	
	2017					9.9
Finland	2022	375.0	73.0	2.2	-7.2	
France	2022	12'076.0	176.0	6.1	-5.0	715.0
Germany	2022	15'310.0	181.0	6.3	-3.5	
Greece	2021	66.0	6.2	0.3		
Hungary	2015	30.0	3.0	0.3		
Ireland	2020	235.0	47.3	2.7		
Italy	2022	3'660.0	62.2	3.6	0.5	
	2021					1'074.0
Latvia	2017	51.0	6.3	1.5		
Lithuania	2017	50.5	17.8	1.0		5.0
Luxembourg	2022	164.0	259.0	8.2	-16.8	
	2021					6.0
Netherlands	2022	1'435.3	80.6	4.4	4.4	
	2019					330.3
Norway	2022	459.7	84.6			25.5
Poland	2022	310.0	8.2	0.6		
Portugal	2011	21.0	2.0	0.2		
Romania	2016	40.7	2.1	0.2		
Russian Federation	2018	183.0	1.3			
Slovenia	2013	48.6	26.6	1.8		
	2009					0.1
Spain	2021	2'532.0	54.8	2.5		63.0
Sweden	2022	2'607.4	247.8	8.2	-1.2	572.0
Switzerland	2022	3'854.9	437.0	11.2	-3.3	
Türkiye	2014	46.2	0.6			
Ukraine	2022	14.4				
	2021		0.6			
United Kingdom	2022	3'413.3	50.6	1.8	-2.2	229.3
Europe		53'070.4	64		-2.2	
European Union		45'098.5	102		-2.8	

Source: FiBL-AMI survey 2024 based on national data sources. For detailed data sources, see annex, page 335.

*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 data are shown.

› Values published in national currencies were converted to euros using the 2022 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.

Table 71: Europe: International Trade 2022

Country	EU imports [MT]*	Exports to EU [MT]**	Exports to USA [MT]**	Exports [Million €]***	Imports [Million €]***
Albania		1'440.3	1.4		
Austria	28'379.1		312.6		
Belarus		270.8			
Bosnia and Herzegovina		10'489.8		6.3	
Bulgaria	14'847.1		10.5		
Croatia	1'059.0		20.8	2.9	34.8
Cyprus	251.6				
Czech Republic	25'552.0		0.8	156.6	158.6
Denmark				453.1	698.2
Estonia	326.1		37'626.8	41.0	
Finland	18'921.3			59.0	
France	240'582.4		1'731.0	887.0	2'830.0
Germany	432'897.1		458.2		
Greece			2'008.3		
Hungary	991.8		4.7	20.0	18.0
Ireland	4'099.4				
Italy	180'388.1		29'858.5	2'900.0	
Kosovo		369.7	32.5	6.0	
Latvia	3'359.4			51.0	
Lithuania	8'346.2			45.0	
Luxembourg	47.2				
Malta	8.8				
Moldova		12'210.8			
Montenegro		24.1			
Netherlands			725.9	1'200.0	
North Macedonia		447.1			
Poland	29'285.3		1.0		
Portugal	4'305.1		2'175.7		
Romania	9'025.7		36'170.2	200.0	35.0
Russian Federation		9'483.9	45'280.0		
Serbia		14'323.6	62.2		
Slovakia	617.0		4.5		
Slovenia	22'418.9			0.1	23.0
Spain	100'140.1		13'522.5	1'697.0	1'309.0
Sweden	190'023.2		46.4	117.0	
Switzerland		12.1	4.3		
Türkiye	14'987.4	104'041.3	60'613.4		
Ukraine		219'124.6	54'050.7	208.0	
United Kingdom	393'666.1	52'915.1	121.7	193.9	
Europe	1'724'525.4	425'153.2	284'964.5		
European Union	1'315'871.9		124'678.4		

Source: European Commission/TRACES, USDA/GATS 2024, FiBL survey based on national data sources

*Imports in metric tons (MT) to the European Union based on Traces/European Commission data

** Exports to the European Union (from European non-EU countries only, based on TRACES/European Commission) and to the US (based on GATS/USDA; all European countries). Please note that the US import data do not cover all products.

*** Export and import values (to and from ALL countries) are based on national data sources.

Table 72: European Union: EU organic imports by EU Member State 2018- 2022 (EU 27)

Country	2018 [MT]	2019 [MT]	2020 [MT]	2021 [MT]	2022 [MT]
Austria	35'921.3	28'379.9	30'766.2	35'345.1	51'097.3
Belgium	177'959.5	371'924.6	303'002.3	276'832.7	268'462.4
Bulgaria	12'280.6	14'847.1	15'330.7	18'870.1	9'217.8
Croatia	3'559.3	1'059.0	540.4	964.3	803.7
Cyprus	211.2	251.6	139.9	225.7	39.4
Czech Republic	29'492.6	19'956.0	25'020.6	30'066.9	33'861.9
Denmark	127'413.1	120'704.8	82'116.4	61'737.5	64'114.2
Estonia	474.8	326.1	313.0	292.4	219.8
Finland	14'987.7	18'921.3	18'421.1	16'036.7	14'730.3
France	213'644.6	240'582.6	274'620.0	271'608.3	277'413.9
Germany	427'633.4	432'923.3	491'718.5	517'182.7	449'275.9
Greece	6'368.0	8'269.8	10'180.1	13'061.1	11'869.7
Hungary	2'061.7	991.8	991.5	1'168.7	724.8
Ireland	19'476.4	4'099.4	61'778.5	83'517.1	55'918.3
Italy	185'803.0	180'388.1	236'106.3	224'956.4	177'762.3
Latvia	52.4	3'359.4	520.0	414.6	9'023.9
Lithuania	2'797.5	8'346.2	33'144.3	34'800.4	20'958.7
Luxembourg	487.8	47.2	65.1	44.4	22.0
Malta	1.0	8.8	60.0	51.4	34.9
Netherlands	953'065.1	1'037'610.4	857'360.6	945'125.0	988'631.5
Poland	19'330.4	29'285.3	36'077.2	37'382.3	32'905.2
Portugal	7'238.9	4'305.1	7'070.4	6'810.3	7'088.1
Romania	8'816.7	9'025.7	10'888.7	9'939.1	4'415.2
Slovakia	455.0	617.0	251.6	407.4	413.1
Slovenia	17'460.9	22'418.9	6'458.3	9'356.8	6'687.7
Spain	78'819.5	100'142.2	112'183.6	93'337.6	87'778.3
Sweden	167'269.1	190'023.2	178'977.7	183'413.0	153'304.4
European Union	2'513'082	2'848'815	2'794'103	2'872'948	2'726'775

Source: TRACES/European Commission 2024

2.4 Organic Agriculture in Latin America and the Caribbean: Tables

Table 73: Latin America and the Caribbean: Organic agricultural land, organic share of total agricultural land, number of organic producers and organic exports to the EU and US 2022

Country	Area [ha]	Share of total agri. land [%]	Producers [no.]	Export to EU and USA [MT]
Argentina	4'064'739	2.7%	1'376	285'702
Bahamas	49	0.3%		
Belize	508	0.3%	385	59
Bolivia	117'368	0.3%	12'517	21'980
Brazil	996'413	0.4%	24'205	172'977
British Virgin Islands	26	0.4%		
Chile	187'101	1.2%	1'450	54'849
Colombia	100'874	0.2%	171	264'094
Costa Rica	12'052	0.7%	63	28'791
Cuba	2'129	0.03%	8	3'695
Dominica	2'907	11.6%	258	
Dominican Republic	196'572	8.1%	20'181	255'359
Ecuador	61'570	1.1%	8'460	593'219
El Salvador	2'087	0.1%	361	382

Country	Area [ha]	Share of total agri. land [%]	Producers [no.]	Export to EU and USA [MT]
Falkland Islands (Malvinas)	31'937	2.8%	3	
French Guiana (France)	3'606	11.1%	108	
Grenada	104	1.3%	2	9
Guadeloupe (France)	1'417	2.7%	242	
Guatemala	70'207	1.8%	141	14'569
Guyana		0.0%		356
Haiti	3'777	0.2%	3'818	1'775
Honduras	66'179	2.0%	15'046	58'146
Jamaica	21	0.005%	2	0
Martinique (France)	1'052	3.4%	152	
Mexico	432'141	0.4%	54'638	535'728
Nicaragua	30'880	0.6%	8'792	10'549
Panama	5'768	0.3%	1'066	208
Paraguay	116'695	0.5%	7'479	107'680
Peru	285'534	1.2%	107'868	343'960
Saint Lucia	20	0.2%	1	
Suriname	52	0.1%	1	62
Trinidad and Tobago	108	0.2%		
Uruguay	2'740'999	19.6%	1'415	5'241
Venezuela	2'496	0.01%	8	
Total	9'537'387	1.3%	270'217	2'759'391

Source: CIAO and FiBL survey 2024, based on information from the private sector, certifiers, and governments; TRACES/European Commission/GATS USDA 2024. For detailed data sources, see annex, page 335.

Table 74: Latin America and the Caribbean: Land use in organic agriculture 2022

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		785'721
Arable land crops	Cereals	143'711
	Dry pulses	22'227
	Fallow land	223
	Flowers and ornamental plants	1'210
	Fresh vegetables and melons	50'307
	Hops	0.2
	Industrial crops	6'528
	Medicinal and aromatic plants	10'628
	Mushrooms and truffles	41
	Oilseeds	57'038
	Plants harvested green	2'024
	Root crops	36'790
	Strawberries	2'450
	Sugarcane	91'553
	Textile crops	18'823
	Tobacco	55
	Arable crops, other	163'048
Arable land crops total		604'459
Other agricultural land		3'316
Permanent crops	Berries	21'709
	Citrus fruit	28'565
	Cocoa	200'760
	Coconut	2'095
	Coffee	421'965
	Fruit	4
	Fruit, temperate	12'598

Land use	Crop group	Area [ha]
	Fruit, tropical and subtropical	102'446
	Fruit/nuts/berries	3
	Grapes	20'833
	Medicinal and aromatic plants	21'246
	Nuts	6'538
	Olives	8'807
	Tea/mate, etc.	3'176
	Permanent crops, other	170'678
Permanent crops total		1'021'394
Permanent grassland		7'120'297
Total		9'537'387

Source: CIAO and FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Table 75: Latin America and the Caribbean: Land use in organic agriculture 2022 by country

Country	Agricultural land and crops, no details [ha]	Arable land crops [ha]	Permanent crops [ha]	Permanent grassland [ha]	Other agricultural land [ha]
Argentina	137'311	70'628	31'780	3'825'021	
Bahamas			49		
Belize			508		
Bolivia		108'828	8'540		
Brazil	599'822	27'409	9'328	359'854	
British Virgin Islands	26				
Chile		3'967	31'367	151'767	
Colombia		14'099	86'355	420	
Costa Rica	847	3'433	7'772		
Cuba		2'129			
Dominica			2'907		
Dominican Republic	21'984	36'240	133'952		2'198
Ecuador		3'577	57'839		155
El Salvador			2'087		
Falkland Islands (Malvinas)				31'937	
French Guiana (France)		228	568	2'377	433
Grenada			104		
Guadeloupe (France)		630	364	158	264
Guatemala		24'895	45'312		
Haiti			3'777		
Honduras	19'924	257	45'998		
Jamaica		3	18		
Martinique (France)		345	342	98	267
Mexico		119'273	302'574	10'293	
Nicaragua		4'667	26'210	3	
Panama	5'768				
Paraguay		115'417	1'278		
Peru		64'359	221'175		
Saint Lucia			20		
Suriname			52		
Trinidad and Tobago			108		0
Uruguay	33	2'585	11	2'738'369	
Venezuela	6	1'490	1'000		
Total	785'721	604'459	1'021'394	7'120'297	3'316

Source: CIAO and FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Table 76: Latin America and the Caribbean: All organic areas 2022

Country	Agriculture [ha]	Aqua- culture [ha]	Forest [ha]	Wild collection [ha]	Other non agri. land [ha]	Total [ha]
Argentina	4'064'739			10'296		4'075'035
Bahamas	49					49
Belize	508					508
Bolivia	117'367			2'231'038		2'348'406
Brazil	996'413		15	2'272'807		3'269'235
British Virgin Islands	26					26
Chile	187'101			132'963		320'064
Colombia	100'874			33'750		134'624
Costa Rica	12'052					12'052
Cuba	2'129					2'129
Dominica	2'907					2'907
Dominican Republic	196'572		2'198		1'198	199'968
Ecuador	61'570	138	40'007	1'574		103'290
El Salvador	2'087					2'087
Falkland Islands (Malvinas)	31'937					31'937
French Guiana (France)	3'606					3'606
Grenada	104					104
Guadeloupe (France)	1'416					1'416
Guatemala	70'207			81'178		151'385
Guyana				55'449		55'449
Haiti	3'777					3'777
Honduras	66'179					66'179
Jamaica	21			7		28
Martinique (France)	1'052					1'052
Mexico	432'141		85	275'594		707'820
Nicaragua	30'880					30'880
Panama	5'768					5'768
Paraguay	116'695				988'604	1'105'299
Peru	285'534			244'237		529'771
Saint Lucia	20				38	58
Suriname	52					52
Trinidad and Tobago	108					108
Uruguay	2'740'999					2'740'999
Venezuela	2'496					2'496
Total	9'537'387	138	42'305	5'338'894	989'840	15'908'563

Source: CIAO and FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Table 77: Latin America and the Caribbean: Use of wild collection areas 2022

Land use/products	Area [ha]
Apiculture	5'568
Forest products	2'000
Fruit, wild collection	4'542
Medicinal and aromatic plants, wild collection	8'983
Mushrooms, wild collection	85
Nuts, wild collection	3'589'654
Palmito, wild collection	56'699

Land use/products	Area [ha]
Seaweed	70
Wild collection, no details	1'671'293
Total	5'338'894

Source: CIAO and FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Table 78: Latin America and the Caribbean: Organic exports to the EU and US by product group 2022

Product group	Exports to EU and US [MT]	Product group	Exports to EU and US [MT]
Fruit, tropical and subtropical	1'344'753	Non-food products	850
Sugar	400'467	Grapes	551
Coffee	187'182	Meat and meat products	425
Fresh vegetables and melons	146'231	Medicinal and aromatic plants, permanent	363
Oilseeds	125'478	Other food products and product groups	327
Berries	107'020	Food additives	291
Cereals	94'734	Spices and aromatics	237
Fruit, berries and nuts, prepared and preserved	54'099	Wild collection, other	159
Fruit of temperate climate zones	39'787	Feedstuffs	154
Medicinal and aromatic plants	34'999	Inputs	141
Cocoa	34'957	Noodles, couscous, etc.	80
Bee products	33'645	Seeds and seedlings	76
Citrus fruit	32'539	Cocoa, chocolate and sugar confectionery, no details	54
Processed and prepared fruits and vegetables	31'438	Root crops	49
Strawberries	28'892	Prepared food, no details	47
Vegetable and animal oils and fats	16'662	Manufactured products, other	47
Beverages	14'638	Fish and fish products	44
Grain mill products	10'683	Seaweed	24
Aquaculture products	4'043	Yeast and other single cell micro-organisms	23
Vegetables, prepared and preserved	3'978	Food and non-food products	22
Hot beverages (Coffee, tea and cacao etc.)	1'751	Tea/mate, etc.	19
Fruit	1'657	Protein concentrates	1
Cocoa, chocolate and sugar confectionery	1'555	Milk and dairy products	1
Nuts	1'293	Permanent crops, other	1
Dry pulses and protein crops for the production of grain	1'044	Other products	0.2
Non edible animal products	1'012	Mushrooms, prepared and preserved	0.2
Olives	868	Fruit/nuts/berries	0.03
		Total	2'759'391

Source: GATS/USDA TRACES/Européen Commission 2024. For detailed data sources, see annex, page 335.

2.5 Organic Agriculture in North America: Tables

Table 79: Northern America: Organic agricultural land, organic share of total agricultural land, number of organic producers and organic exports to the EU and US 2022

Country	Area [ha]	Share of total agri. land [%]	Producers [no.]	Export to EU and USA [MT]
Canada	1'567'077	2.7%	6'503	212'729
United States of America	2'060'741	0.5%	17'445	8'903
Total	3'627'818	0.8%	23'948	221'632

Source: USDA and COTA 2024; TRACES/European Commission/GATS USDA 2024. For detailed data sources, see annex, page 335.

Table 80: Northern America: Land use in organic agriculture 2022

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		1'146'631
Arable land crops	Cereals	705'834
	Dry pulses and protein crops for the production of grain	151'950
	Flowers and ornamental plants	5
	Fresh vegetables and melons	114'007
	Hops	730
	Industrial crops	1'080
	Medicinal and aromatic plants	481
	Mushrooms and truffles	48
	Oilseeds	195'232
	Plants harvested green	379'285
2.5	Root crops	4'495
	Strawberries	105
	Textile crops	45'855
	Arable crops, other	9'024
Arable land crops total		1'609'910
Other agricultural land		51'451
Permanent crops	Berries	23'819
	Citrus fruit	5'479
	Coffee	196
	Fruit	377
	Fruit, temperate	18'815
	Fruit, tropical and subtropical	4'125
	Fruit/nuts/berries	33
	Grapes	18'535
	Nurseries	649
	Nuts	13'188
	Olives	666
	Tea/mate, etc.	1
	Permanent crops, other	197'067
Permanent crops total		282'951
Permanent grassland		536'875
Total		3'627'818

Source: USDA and COTA 2024. For detailed data sources, see annex, page 335.

Table 81: Northern America: Land use in organic agriculture 2022 by country

Country	Agricultural land, no details [ha]	Arable land [ha]	Permanent crops [ha]	Permanent grassland [ha]	Other agricultural land [ha]
Canada	617'223	665'798	213'405	19'200	51'451
United States of America	529'408	944'112	69'546	517'675	
Total	1'146'631	1'609'910	282'951	536'875	51'451

Source: USDA and COTA 2024. For detailed data sources, see annex, page 335.

Table 82: Northern America: All organic areas 2022

Country	Agriculture [ha]	Forest [ha]	Wild collection [ha]	Other non agri. land [ha]	Total [ha]
Canada	1'567'077	2'943	163'942	47'475	1'781'438
United States of America	2'060'741				2'060'741
Total	3'627'818	2'943	163'942	47'475	3'842'179

Source: USDA and COTA 2024. For detailed data sources, see annex, page 335.

Table 83: Northern America: Use of wild collection areas 2022

Land use	Area [ha]
Berries, wild collection	10
Medicinal and aromatic plants, wild collection	0.2
Mushrooms, wild collection	50'003
Nuts, wild collection	23
Seaweed	113'863
Wild collection, no details	43
Total	163'942

Source: USDA and COTA 2024. For detailed data sources, see annex, page 335.

Table 84: Northern America: Organic retail sales in 2022

Country	Retail sales, all [Million €]	Retail sales, all [€/person]
United States of America	58'566.0	175.7
Canada	5'799.9	146.6
Total	64'365.9	170.8

Source: OTA for USA and COTA for Canada 2024. For detailed data sources, see annex, page 335.

Table 85: Northern America: Organic exports to the EU and US by country (totals) 2022

Country	Export to USA [MT]	Export to EU [MT]	Export to EU and USA [MT]
Canada	192'919	21'172	214'091
United States of America		8'903	8'903
Total	192'919	30'076	222'995

Source: GATS/USDA TRACES/European Commission 2024. For detailed data sources, see annex, page 335

Table 86: Northern America: Organic exports to the EU and US by commodity 2022

Product group	Exports to EU and USA [MT]	Product group	Exports to EU and USA [MT]
Cereals	141'990	Cocoa, chocolate and sugar confectionery, no details	66
Oilseeds	29'752	Other food products and product groups	66
Fresh vegetables and melons	17'031	Feedstuffs	59
Fruit, berries and nuts, prepared and preserved	8'388	Milk and dairy products	47
Sugar	7'064	Medicinal and aromatic plants	38
Coffee	4'463	Strawberries	32
Dry pulses and protein crops for the production of grain	3'811	Meat and meat products	31
Root crops	2'472	Food additives	30
Grain mill products	1'034	Other products	21
Nuts	902	Protein concentrates	20
Processed and prepared fruits and vegetables	834	Cocoa	17
Bread and bakery products	833	Food and non-food products	11
Beverages	728	Bakery and farinaceous products	9
Hot beverages (Coffee, tea and cacao etc.)	513	Olives	8
Vegetable and animal oils and fats	379	Textile crops	7
Non-food products	318	Mushrooms, prepared and preserved	7
Fruit of temperate climate zones	260	Yeast and other single cell micro-organisms	5
Grapes	234	Cocoa, chocolate and sugar confectionery	3
Hops	231	Permanent crops, other	3
Berries	209	Wild collection, other	2
Fruit, tropical and subtropical	205	Fruit/nuts/berries	1
Prepared food, no details	169	Spices and aromatics	0.2
Vegetables, prepared and preserved	165	Manufactured products, other	0.1
Bee products	164	Mushrooms and truffles	0.02
Tea/mate, etc.	160	Coconut	0.01
Seaweed	104	Medicinal and aromatic plants, permanent	0.003
Seeds and seedlings	97	Total	222'995

Source: GATS/USDA TRACES/European Commission 2024. For detailed data sources, see annex, page 335.

2.6 Organic Agriculture in Oceania: Tables

Table 87: Oceania: Key indicators 2022

Country	Area [ha]	Share of total agri. land [%]	Producers [no.]	Export to EU and USA [MT]
Australia	53'016'058	14.8%	1'635	1'394
Cook Islands	9	0.6%	59	
Fiji	19'089	4.5%	24	24
French Polynesia	2'197	4.8%	60	68
New Caledonia	801	0.4%	4	0.5
New Zealand	79'347	0.8%	685	29'454
Papua New Guinea	19'723	1.7%	18'984	2'499
Samoa	47'171	16.7%	1'857	100
Solomon Islands	7'596	6.5%	957	17
Tonga	322	0.9%		
Vanuatu	2'325	1.2%	201	

Country	Area [ha]	Share of total agri. land [%]	Producers [no.]	Export to EU and USA [MT]
Total	53'194'639	14.3%	24'466	33'557

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments; TRACES/European Commission/GATS USDA 2024. For detailed data sources, see annex, page 335.

Tables: Oceania: Land use in organic agriculture 2022

Land use	Crop group	Area [ha]
Agricultural land and crops, no details		563'644
Arable land crops	Cereals	41'293
	Fresh vegetables and melons	4'010
	Medicinal and aromatic plants	43
	Sugarcane	9
	Arable crops, other	6'052
Arable land crops total		51'406
Other agricultural land		4'299
Permanent crops	Citrus fruit	1
	Coconut	2'703
	Coffee	2'770
	Fruit	4'567
	Fruit, tropical and subtropical	172
	Grapes	5'783
	Medicinal and aromatic plants	103
	Permanent crops, other	18'311
Permanent crops total		34'409
Permanent grassland		52'540'881
Total		53'194'639

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Table 88: Oceania: Land use in organic agriculture 2022 by country

Country	Agricultural land, no details [ha]	Arable crops [ha]	Permanent crops [ha]	Permanent grassland [ha]	Other agricultural land [ha]
Australia	470'317	45'195	10'350	52'485'897	4'299
Cook Islands			9		
Fiji	18'711	1	378		
French Polynesia	114	51	2'032		
New Caledonia	801				
New Zealand		6'052	18'311	54'984	
Papua New Guinea	16'609		3'114		
Samoa	47'171				
Solomon Islands	7'596				
Tonga		108	215		
Vanuatu	2'325				
Total	563'644	51'406	34'409	52'540'881	4'299

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Table 89: Oceania: Organic retail sales 2022

Country	Retail sales [Million €]	Per capita [€/person]
Australia	1'338	51.5
New Zealand	172	33.6

Source: FiBL survey 2024, based on information from the private sector, certifiers, and governments. For detailed data sources, see annex, page 335.

Table 90: Oceania: Organic exports to the EU and US by commodity 2022 (totals)

Country	Exports to EU and USA [MT]
Fruit of temperate climate zones	13'675
Fruit, tropical and subtropical	9'472
Beverages	5'044
Coffee	2'498
Fresh vegetables and melons	1'776
Fruit, berries and nuts, prepared and preserved	256
Noodles, couscous, etc.	217
Processed and prepared fruits and vegetables	168
Bee products	110
Vegetable and animal oils and fats	49
Cereals	44
Olives	42
Spices and aromatics	38
Other food products and product groups	35
Medicinal and aromatic plants	35
Non-food products	27
Grain mill products	20
Food additives	17
Seeds and seedlings	13
Hops	8
Medicinal and aromatic plants, permanent	6
Plants harvested green	2
Permanent crops, other	2
Other products	1
Hot beverages (Coffee, tea and cacao etc.)	1
Tea/mate, etc.	1
Total	33'557

Source: GATS/USDA TRACES/European Commission 2024. For detailed data sources, see annex, page 335.

Annex II: Data Providers and Data Sources; About the FiBL survey

Data providers and data sources

In this section, we provide the data sources for our survey on organic worldwide. If not otherwise stated, the data is from 2022. Several sources appear a number of times; here the full information:

- European Commission/TRACES, Brussels: EU imports of organic agri-food products. Analytical Brief N° 2.
https://agriculture.ec.europa.eu/system/files/2023-07/analytical-brief-2-eu-organic-imports-2022_en.pdf
- Eurostat: Area, crop and livestock production, operators EU and EU candidate countries,
<https://ec.europa.eu/eurostat/web/agriculture/data/database>
- GATS/USDA for US export and import data: USDA Foreign Agricultural Service's Global Agricultural Trade System, available at
<https://apps.fas.usda.gov/GATS/>

Afghanistan

Source

- › Certifier data (from 2020)
- › Exports (MT): GATS/USDA

Albania

Source

- › Area, operators: Mediterranean Organic Agriculture Network (MOAN), Istituto Agronomico Mediterraneo di Bari (CHEAM Bari), Bari, Italy
- › Wild collection: Certifier data
- › Exports (MT) to the EU: European Commission/Traces; GATS/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.
- › Exports (MT): European Commission/Traces and GATS/USDA

Andorra

Source

- › Ecocert Iberica, Seville, Spain

Angola

- Exports (MT): European Commission/Traces

Argentina

Source

- › Area, operator, production, export, retail sales (MT) data: provided by SENASA, Buenos Aires, Argentina, www.senasa.gov.ar
- › Exports (MT) to EU and USA: European Commission/Traces, and GATS/USDA

Contact

Diego Pinasco, SENASA, Buenos Aires, Argentina, www.senasa.gob.ar

Armenia

Source

- › Area, operators: Survey of Ecoglobe - Organic control and certification body, Yerevan, Republic of Armenia, www.ecoglobe.am
- › Exports (MT) to EU and US: European Commission/Traces, GATS/USDA

Contact

Eliza Petrosyan and Nune Darbinyan, Ecoglobe - Organic control and certification body, Yerevan, Republic of Armenia, www.ecoglobe.am

Australia

Source

- › Area, operators (data 2022): Australian Organic (2023): Market Report 2023. Australian Organic, Nundah
- › Land use and crop data (from 2016): Source: Australian Bureau of Statistics ABS, provided by Els Wynen, Canberra.¹
- › Retail sales: Australian Organic
- › Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

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>

Note

See also the article about organic farming in Australia in this and in previous editions of “The World of Organic Agriculture.”

Contact

Nicole Ford and Kane Frampton, Australian Organic, Nundah, Australia

Austria**Sources**

- › Area, land use and operators: Bundesministerium für Landwirtschaft, Tourismus und Regionen, Vienna, Austria, and : Eurostat database, Eurostat, Luxembourg
- › Retail sales: RollAMA based on GfK, AMA-Marketing, Agrarmarkt Austria Marketing GesmbH, Vienna, Austria
- › Import data (MT): European Commission/Traces;
- › Export data (MT) to US: GATS/USDA

Contact

- › Pia Reindl and Barbara Köcher-Schulz, AMA-Marketing GesmbH AMA, Vienna, Austria

Azerbaijan**Source**

- › Area, operators (from 2020): GABA Ganja Agribusiness Association, Ganja, Azerbaijan
- › Exports (MT) to EU and US: European Commission/Traces, GATS/USDA

Contact

Dr Vugar Babayev, Ganja Agribusiness Association (GABA), Ganja, Azerbaijan

Bahamas

Certifier data

Bahrain

Processing only; 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.
- › Exports (MT) to EU and US: European Commission/Traces, GATS/USDA

Contact

Dr. Shaikh Tanveer Hossain, IFOAM Asia
Dr Khurshid Alam, BARI, Bangladesh

Belarus**Source**

- › Area, operators: Ecoidea project, Minsk, Belarus. To this data, the data of an international certifier were added.
- › Exports (MT) to EU: European Commission/Traces

Contact

Tatsiana Ostrouh. Ecoidea project, Minsk, Belarus

Belgium**Sources**

- › Area and livestock data (2021, total rearing area 2022): Eurostat database, Eurostat, Luxembourg, and Biowallonie, Brussels, Belgium
- › Retail sales share of total: Biowallonie, Brussels, Belgium
- › Import data: European Commission/Traces

Belize**Source**

- › Area and producers: Certifier data. Not all certifiers provided updated data for 2022.
- › Exports (MT) to EU: European Commission/Traces

Benin**Sources**

- Area, operators (updates were not received from all certifiers)
- › CERTISYS, Bolline, 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
- › OneCert international, Jaipur, India
- › Textile exchange, cotton area data
- › Exports (MT) to the EU: European Commission/Traces

Bermuda

- › No data were received for Bermuda

Bhutan**Source**

- › Area, operators: National center for Organic Agriculture (NCOA) Thimphu, Bhutan, www.moa.gov.bt

Contact

Kesang Tshomo, Ministry of Agriculture and Forestry,

Bolivia**Source**

- › Area, operator, production, operators (2020) from SENASAG, provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina.
- › Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Bosnia Herzegovina**Source**

- › Area, producers: Ministry of Agriculture, Water Management and Forestry, Sarajevo, Bosnia and Herzegovina. The data is from 2021

- › Crop details are from 2019 and were provided by the Mediterranean Organic Agriculture Network (MOAN, Bari, Italy)
- › Exports (MT) to EU: European Commission/Traces
- › Retail sales (2017): Organska Kontrola, Sarajevo, Bosnia and Herzegovina

Contact

Elda Hodžić-Isović, Ministry of Agriculture, Water Management and Forestry, Sarajevo, Bosnia and Herzegovina

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, which includes PGS data (certified by the Ministry of Agriculture). Historical data were revised.
- › Crop data: Into this data, the crop details of international certifiers were included: Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de; CERES-CERT, Frick, Switzerland, www.ceres-cert.de; Control Union, Zwolle, The Netherlands, www.controlunion.org; IMOCert Latinoamerica, Bolivia, www.imocert.bio; Organización Internacional Agropecuaria (OIA), Buenos Aires, Argentina, www.oia.com.ar, as well data from the Textile Exchange (<https://textileexchange.org/>) The certifier data are currently not registered under the system of the MAPA. For MAPA data.
- › Exports (MT) to EU and USA: European Commission/Traces and GATS/USDA
- › Total export value and retail sales data: Organic Brazil (2016 data)

Note

- › Area and operator data from MAPA includes PGS data.
- › Land use and crop details were available only from 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, Brasília, Brazil

British Virgin Island**Source**

Area, operators: Certifier data

Brunei Darussalam

Ecocert China, Beijing ECOCERT Certification Centre, www.ecocert.com/zh-CN/home

Bulgaria**Sources**

- › Land area, operators: Area and operators: Eurostat database organic farming, Eurostat, Luxembourg
- › Number of beehives: Ministry of Agriculture, Sofia, Bulgaria, provided by Bioselena, Karlovo, Bulgaria
- Retail sales: FAS (2023): Organic Market Annual Report Bulgaria. FAS/GAIN, USDA, Washington. Available at <https://fas.usda.gov/data/bulgaria-organic-market-annual-0>
- › Import data [MT]: European Commission/Traces
- › Exports [MT] to US: GATS/USDA

Contact

Dr. Stoilko Apostolov, FOA Bioselena, Karlovo, Bulgaria. www.bioselena.com

Burkina Faso**Sources**

- Area, operators: Certifier data
- › Exports (MT) to EU: European Commission/Traces

Burundi**Source**

- › Ecocert East Africa, Antananarivo, Madagascar
- › Exports (MT) to EU: European Commission/Traces

Cambodia**Source**

- › Area/operators: Certifier data.
- › Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Cameroon**Source**

- › Ecocert West Africa, Ouagadougou, Burkina Faso, www.ecocert.com (2020). Producer data are from 2017.
- › Ecocert East Africa, Antananarivo, Madagascar
- › Exports (MT) to EU and US: European Commission/Traces and GATS/USDA

Canada**Source**

- › Land area, producers and other operator types, retail sales, market data: Canada Organic Trade Association (COTA), Ottawa, Canada
- › Exports (MT) to EU and US: European Commission/Traces and GATS/USDA

Contact

Tia Loftsgard and Zahraa Al Haj Hasan, 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

No data

Cayman Islands

› Certifier data

Chad

- › Area (wild collection): Certifier data.
- › Exports (MT) to EU: European Commission/Traces

Channel Islands**Source**

- › Area: FAOSTAT (data 2021). The FAOSTAT website, FAOSTAT, Rome, Italy, <https://www.fao.org/faostat/en/#data> FAOSTAT > Land, Inputs and Sustainability

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
- › Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

- › María José Pizarro Álvarez, Oficina de Estudios y Políticas Agrarias (ODEPA), Ministerio de Agricultura, Santiago, Chile, www.odepa.gob.cl
- › Claudio Cárdenas Catalán, Servicio Agrícola y Ganadero (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
- › Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

Yuhui Qiao, Chinese Agricultural University, Beijing, China

Colombia**Source**

- › Area data: from Federación Orgánicos de Colombia.
- › Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Contact

Luis Betancourt Zuluaga, Federación Orgánicos de Colombia (FEDEOrgánicos), Bogotá, Colombia.

Note

The data from Federación de Orgánicos de Colombia is based on estimates.

Comoros**Source**

- › Area and operators: Ecocert East Africa, Antananarivo, Madagascar
- › Exports (MT) to EU: European Commission/Traces

Congo, Republic of

Exports (MT) to USA: GATS/USDA

Congo, Democratic Republic of

- › Area and producers: Certifier data.
- › Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Cook Islands**Source**

- › Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int.

Contact

- › Jim Pierce, Secretariat of the Pacific Community (SPC), Suva, Fiji, www.spc.int

Costa Rica**Source**

- › Area and operator data: 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
- › Exports (MT) to EU and USA: European Commission/Traces, USDA
- › Contact: Karla Morales, Servicio Fitosanitario del Estado (SFE), San José, Costa Rica

Côte d'Ivoire**Sources**

The data were compiled by FiBL based on the data of the following international certifiers:

- › CERTISYS, Bolline, Belgium
- › Control Union, Zwolle, The Netherlands, www.controlunion.org
- › Ecocert West Africa, Ouagadougou, Burkina Faso, www.ecocert.com
- › Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Croatia**Sources**

- › Area and operators: Eurostat database organic farming, Eurostat, Luxembourg
- › Market (from 2014) & export value data (from 2011): Darko Znaor, Independent Consultant, 10000 Zagreb, Croatia
- › Import data (MT): European Commission/Traces
- › Exports to the US (MT): GATS/USDA

Cuba

- › Area and operators: Certifier data (2019)
- › Exports (MT) to EU and USA: European Commission/Traces, GATS/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
- › Exports (MT) to the USA: GATS/USDA

Czechia**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 retail sales data is from 2021.
- › Import data (MT): European Commission/Traces
- › Exports (MT) to the USA: GATS/USDA

Contact

- › Hana Šejnohová and Jana Hlaváčková, 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 (2021), operators (2020): 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, import and export value (euros): Statistics Denmark
- › Import data (MT): European Commission/Traces

Contact

- › Ejvind Pedersen, Danish Agriculture & Food Council, Copenhagen, Denmark

Djibouti

- › Area/Operators: No data were reported
- › Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Dominica**Source**

- › Area and operators: Certifier data

Dominican Republic**Source**

- › Area, operators, and production data: from Secretaría 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

- › Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Contact

- › Miguel Ángel Cepeda Jiménez and Yatriña De León Rosario 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
- › Exports (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
- › Exports (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), Santa Tecla, El Salvador
- › Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina
- › Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

- › Jose Fernando Maldonado Cestona, Ministerio de Agricultura y Ganadería - Dirección General de Sanidad Vegetal (MAG-DGSV), San Salvador, El Salvador

Equatorial Guinea

- › Operators: Certifier data

Estonia**Sources**

- › Land area, land use, operators: Eurostat database, Eurostat, Luxembourg
- › Wild collection: Estonian Organic Farming Foundation (2023): Organic Farming in Estonia

2021. Tartu. Available at
<https://www.maheklubi.ee/mison/eestis/>
 › Retail sales data: Estonian Institute of Economic Research, Estonia
 › Export data (euros): Estonian Ministry of Agriculture
 › Exports (MT) to the USA: USDA
 › Imports (MT): European Commission/Traces
 › Detailed reports 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

Ethiopia**Sources**

Area and operator data
 › CERES–CERT, Frick, Switzerland
 › 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)
 Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

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

Faroe Islands**Source**

› Vottunarstofan Tún ehf, Laugavegur 7, 101 Reykjavík, Iceland, www.tun.is. (2021 data)

Contact

› Gunnar Gunnarsson and Ragnar Þórðarson, 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
 › Exports (MT) to EU: European Commission/Traces

Contact

› Jim Pierce, Pacific Organic and Ethical Trade Community (POETCom), Suva, Fiji

Finland**Sources**

› Land area and operators: Finnish Food Authority, data provided by Pro Luomu, Helsinki, Finland
 › Retail sales and export data: Pro Luomu, Helsinki, Finland
 › Import data: European Commission/Traces

Contact

› Heidi Haavisto-Meier and Aura Lamminparras, Pro Luomu, Helsinki, Finland

France**Source**

› Area and operators: Agence Bio, Montreuil-sur-Bois, France. www.agencebio.org. Crop details (2021): Eurostat database, Eurostat Luxembourg
 › Retail sales (2022), export and import values (2020): Agence Bio, Montreuil-sur-Bois, France
 › Import data (MT): European Commission/Traces
 › Exports to US (MT): GATS/USDA

French Guyana**Source**

› Agence Bio, Montreuil-sur-Bois, France.
www.agencebio.org.

French Polynesia**Source**

› Area and operators: Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int.
 › Exports (MT) to EU: European Commission/Traces

Contact

› Jim Pierce, 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, 16 Gazapkhuli Street, 0177 Tbilisi, Georgia, www.elkana.org and data from an international certifier.
 › Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Contact

› Elene Shatberashvili and Mariam Jorjadze, Biological Farming Association Elkana, 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
- ›Exports to the US (MT): GATS/USDA

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.

- ›CERES-CERT, Frick, Switzerland
- ›CERTISYS, Bolln, www.certisys.eu
- ›Control Union, Zwolle, The Netherlands, www.controlunion.org
- ›Letis, Rosario, Santa Fe, Argentina
- ›Ecocert, East Africa, Ougadougou, Burkina Faso
- ›Exports (MT) to EU and US: European Commission/Traces and GATS/USDA

Greece**Sources**

- ›Land area and operators: Ministry of Agriculture, Athens, Greece.
- ›Market data (2021): Daso Business Performance PC, Strategy & Management Consultants, Thessaloniki, Greece
- ›Import data (MT): European Commission/Traces
- ›Exports to US (MT): GATS/USDA

Contact

- ›Nicole van der Smitten, Feres, Greece

Grenada

- ›Area and operators: Certifier data.
- ›Exports (MT) to EU and USA: European Commission/Traces, USDA

Guadeloupe**Source**

- ›Agence Bio, Montreuil-sur-Bois, France. www.agencebio.org.

Guatemala**Source**

- ›Area, operators, and total export data: Department of Organic Agriculture, Ministerio de Agricultura, Ciudad de Guatemala, Guatemala www2.maga.gob.gt. Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina

- ›Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

- ›Lauro Antonio Rivera Gramajo, 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.
- ›Exports (MT) to USA: USDA

Guinea Bissau

- ›No area or operator data were provided.
- ›Exports (MT) to EU: European Commission/Traces

Guyana**Source**

- ›Area: Wild collection (2019): Certifier data
- ›Exports (MT) to EU: European Commission/Traces

Haiti**Sources**

- ›Area and operators: Certifier data
- ›Exports (MT) to EU and USA: European Commission/Traces, USDA

Honduras**Source**

- ›Area and operators: (2020): SENASA Honduras, SAG, Tegucigalpa, Honduras; crop details based on data from certifiers.
- ›Data were provided via Comisión Interamericana de Agricultura Orgánica (CIAO), Buenos Aires, Argentina
- ›Exports (MT) to EU and USA: European Commission/Traces, USDA

Hong Kong

- ›Certifier data
- ›Exports (MT) to EU and USA: European Commission/Traces, USDA

Hungary**Sources**

- ›Land area and operator data: Eurostat database, Eurostat, Luxembourg
- ›Market and trade data (2009/2015): Survey/Estimate by Ferenc Frühwald, Budapest, Hungary
- ›Import data (MT): European Commission/Traces
- ›Exports to the US (MT): GATS/USDA

Contact

- ›Dora Drexler, Hungarian Institute of Organic Agriculture ÖMKi, Budapest, Hungary, www.biokutatas.hu

Iceland**Source**

› Vottunarföstofan Tún ehf, Laugavegur 7, 101 Reykjavík, Iceland, www.tun.is. (2021 data)

Contact

› Gunnar Gunnarsson and Ragnar Þórðarson, Vottunarföstofan Tún ehf

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 (2021 data). For some key crops (soybeans, rice), the potential crop land was calculated by FiBL, using the EU and US organic import volumes as a basis (European Commission/TRACES and USDA/GATS).
- › Retail sales data (2017): ICCOA- International Competence Centre for Organic Agriculture, Karnataka, India
- › Exports (MT) to EU and USA: European Commission/Traces, USDA

Note

In addition to the 3rd party certified area, there were 103'6522 hectares with PGS certification managed by a total of 1'66'0821 farmers organised in 64509 PGS groups. The data is available at: <http://pgsindia-ncf.gov.in> (Accessed January 27, 2024).

Indonesia**Source**

- › Area data were compiled from several international certifiers
- › For the producers, the data from the Indonesian Organic Alliance were maintained (from 2017). Further clarification is needed for Indonesia.
- › Exports (MT) to EU and USA: European Commission/Traces, USDA

Iran**Sources**

- › Area and operators: Certifier data
- › Beehives: Shahid Beheshti University ESRI, Evin, Tehran, Iran (2017).
- › Exports (MT) to EU and USA: European Commission/Traces, GATS/USDA

Note

Please note that the data source changed in 2020. The data was compiled by FiBL based on the data from 3 international certifiers. Previously data were provided by the Shahid Beheshti University ESRI, Evin, Tehran, Iran (last update: 2017).

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 and Operators: Eurostat, Luxembourg
- › Aquaculture: European Market Observatory for Fisheries and Aquaculture Products (2022): Organic Aquaculture in the EU. European Commission, Brussels. Available at https://www.eumofa.eu/documents/20178/432372/Organic+aquaculture+in+the+EU_final+report_ONLINE.pdf
- › Retail sales: (2021): Bord Bia, Dublin, Ireland.
- › Import data (MT): European Commission/Traces
- › Exports (MT) to USA: GATS/USDA

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
- › Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Shelly Elisian, Standardization and Accreditation Department, Ministry of Agriculture and Rural Development, Plant Protection and Inspection Services (PPIS), Israel

Italy**Sources**

- › Organic area and operators, retail sales: SINAB (2023): Bio in Cifre 2023. SINAB, Roma, Available at <https://www.sinab.it/sites/default/files/2023-07/BIO%20IN%20CIFRE%202023.pdf>
- › Crop data: Eurostat (2020 and 2021 data)
- › Catering sales: Nomisma, Bologna, Italy (2021 data)
- › Import data (MT): European Commission/Traces
- › Exports to the US (MT): GATS/USDA

Contact

› Prof. Dr. Raffaele Zanolì, Università Politecnica delle Marche UNIVPM, Ancona, Italy Jamaica

Source

- › Certifier data
- › Exports (MT) to the USA: USDA

Japan**Source**

- › Area and producer (2022) data: Ministry of Agriculture, Forestry and Fisheries (MAFF), Tokyo, Japan
- › Domestic market data (2022): Estimate of the Ministry of Agriculture, Forestry and Fisheries (MAFF), Tokyo, Japan. . Please note that the data include catering sales.
- › Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

- › Prof. Dr. Yoko Taniguchi. Associate Professor, Setsunan University, Japan
- › Miyoshi Satoko, Executive member, Organic Congress Japan

Jordan**Source**

- › Area and operators: Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy
- › Exports (MT) to EU and USA: European Commission/Traces, USDA

Kazakhstan**Sources**

- Area and operators
- › CERES-CERT, Frick, Switzerland
- › Letis, Rosario, Santa Fe, Argentina
- › Organic Standard, Kyiv, Ukraine
- Exports (MT) to EU and USA: European Commission/Traces, USDA

Note

The area are probably not complete as not all certifiers that are active in the country provide data

Kenya**Source**

- › Area and operators: Kenya Organic Movement (KOAN), Nairobi, Kenya, www.koan.co.ke
- › Exports (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: National Agricultural Products Quality Management Service, National Statistical Office, Korea Rural Economic Institute, Korea
- › Exports (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: Certifier data and Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy
- › Wild collection: Certifier data. Please note that this data includes double counting as wild harvest products were counted separately.
- › Exports (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 two international certifiers was added
- › Exports (MT) to EU: European Commission/Traces

Contact

- › Nurbek Kannazarov, Organic Farming Kyrgyzstan

Lao People's Democratic Republic**Source**

- Area and operators
- › ACT, Organic Agriculture Certification Thailand (ACT), Bangkok, Thailand
- › Bioagricert, Bologna, Italy
- › CERES-Cert, Frick, Switzerland
- › Ecocert India, Aurangabad, Maharashtra, India, www.ecocert.com
- › Onecert, Jaipur, Rajasthan.
- Exports (MT) to EU and USA: European Commission/Traces, USDA

Latvia**Source**

- › Area and Operators (2021): 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
 › Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Angel Atallah, CCPB Middle East, Beirut, Lebanon

Lesotho

› Area and producers: Certifier data.
 › Exports (MT) to EU: European Commission/Traces

Liberia

› Area/Operators: Certifier data
 › Exports (MT) to EU: European Commission/Traces

Liechtenstein

Source

› Klaus Büchel Anstalt, Institute of Agriculture and Environment, Mauren, Liechtenstein, www.kba.li.

Contact

› Florian Bernardi and Klaus Büchel, Institute of Agriculture and Environment, Mauren, Liechtenstein, www.kba.li.

Lithuania

Source

› Land area, production, operators: Ekoagros, Kaunas, Lithuania
 › 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 and Eurostat database, Eurostat, Luxembourg Market data: Oekopolis. 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
 › Sandra Delattre, Oekopolis, Munsbach, www.biogros.lu

Madagascar

› Area and producers: Certifier data. Not all certifiers provided updated data. › Exports (MT) to EU and USA: European Commission/Traces, USDA

Malawi

› Not data were reported for Malawi.

Malaysia

› Area and operators: Certifier data.
 › Exports (MT) to EU and USA: European Commission/Traces, USDA

Maldives

› Area and operator data were not received.
 › Exports (MT) to EU: European Commission/Traces

Mali

› Area and operators: Certifier data.
 › Exports (MT) to EU: European Commission/Traces

Malta

Source

› Area, operators, livestock, production: Mediterranean Organic Agriculture Network, Bari, Italy and Eurostat database, Eurostat, Luxembourg
 › Import data (MT): European Commission/Traces

Martinique (France)

Source

› Agence Bio, Montreuil-sur-Bois, France, www.agencebio.org

Mauritius

Source

› Area, and producers: Ecocert offices in Africa. www.ecocert.com
 › Exports (MT) to EU: European Commission/Traces

Contact

› Exports (MT) to EU and USA: European Commission/Traces, USDA

Mayotte (France)

Source

› Agence Bio, Montreuil-sur-Bois, France. www.agencebio.org

Mexico

Source

› Area and 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
 › Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Aurora Josefina Lobato García, Servicio Nacional de Sanidad, Inocuidad y Calidad Agroalimentaria (SENASICA), Secretaría de Agricultura y Desarrollo Rural (SADER), Ciudad de México, México

Moldova**Source**

› Area and operators: Ministry of Agriculture and Food Industry, Chişinău, Moldova
› Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Marina Iluşca Head of the Department for Organic Production and Products of Origin, Ministry of Agriculture and Food Industry of the Republic of Moldova, Chişinău, Moldova

Monaco

Certifier data (2019)

Mongolia

› Total organic farmland from 2022, other data (area details, operators, retail sales) from 2020: Department of Coordination for Food Production Policy Implementation, Ministry of Food Agriculture and Light industry of Mongolia. See also chapter on organic in Asia in this volume.

Contact

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

Note

The data refer to PGS operations certified under the governments' accreditation system. Historical data are currently revised by the government.

Montenegro**Source**

› Area and operators: Ministry of Agriculture and Rural Development, Podgorica, Montenegro and Eurostat, Luxembourg
› Market data (from 2010): Ecozept - Market research and marketing consulting agency. Freising, Germany
› Exports (MT) to EU: European Commission/Traces

Contact

› Milica Bučković, Ministry of Agriculture, Forestry and Water Management, Podgorica, Montenegro

Morocco**Sources**

› Area and operators (2020): Mediterranean Organic Agriculture Network (MOAN), MOAN Secretariat Istituto Agronomico Mediterraneo di Bari (CIHEAM Bari), Bari, Italy

› Exports (MT) to EU and USA: European Commission/Traces, USDA

Mozambique**Sources**

› Area and operators: Certifier data
› Exports (MT) to EU: European Commission/Traces

Myanmar

› Area and operators: Certifier data.
› Exports (MT) to EU and USA: European Commission/Traces, USDA

Namibia

› Area and operators: Certifier data. For cotton, data from the Textile exchange were added.
› Exports (MT) to EU and USA: European Commission/Traces, USDA

Nepal**Source**

› Area and operators: Certifier data were compiled based on the data of 4 international certifiers, not all of which provided updated data.
› Exports (MT) to EU and USA: European Commission/Traces, USDA

Netherlands**Sources**

› Land area and operator data (2021): Eurostat database, Eurostat, Luxembourg. Crop details from 2020.
› Retail sales and export data: Bionext, Ede, The Netherlands; the Bionext website, <https://bionext.nl/>.
› Import data (MT): European Commission/Traces
› Exports to the US (MT): GATS/USDA

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. To this data, the data of one international certifier was added.
› Exports (MT) to EU: European Commission/Traces

Contact

› Jim Pierce, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

New Zealand**Source**

› Area, operators, retail sales, exports (2020): Organics Aotearoa New Zealand, Wellington, New Zealand, www.oanz.org.nz, provided by Agribusiness group.

› Exports (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

› Exports (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.

› Exports (MT) to EU: European Commission/Traces

Nigeria

Source

› Area and operators: Data from 4 certifiers were used, not all of who provided updates.

› Exports (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

› No updates were received

North Macedonia

Source

› Land area and operator data: Ministry of Agriculture, Forestry and Water Management, Skopje, North Macedonia and Eurostat database, Eurostat, Luxembourg

› Wild collection: Certifier data

› Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

› Olivera Bicikliski, Ministry of Agriculture, Forestry and Water Management, Skopje, North Macedonia

Norway

Sources

› Land area, livestock: Norwegian Agriculture Agency (Landbruksdirektoratet), Oslo, Norway

› Operators(2022) Eurostat database, Eurostat, Luxembourg

› Market data: Total retail sales data were compiled by FiBL based on data from the Norwegian Agriculture Agency

Contact

Mikael Meland Leksén, Norwegian Agriculture Agency (Landbruksdirektoratet), Oslo, Norway

Oman

Source

› Certifier data

Pakistan

› Area and producers: Certifier data (not updated in all cases). For the number of the producers, data from the Textile Exchange were added.

› Exports (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

› Exports (MT) to EU and USA: European Commission/Traces, USDA

Panamá

Source

› Area and operators: Ministerio de Desarrollo Agropecuario, Dirección Nacional de Sanidad Vegetal, Panamá, www.mida.gob.pa.

› Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

Fermín Vicente Romero Houlstan, Dirección Nacional de Sanidad Vegetal; Ministerio de Desarrollo Agropecuario (MIDA), Panamá, República de Panamá

Papua New Guinea

Source

› Area and operators: Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int. To this data, the data of 2 international certifiers were added.

› Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

Jim Pierce, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

Paraguay**Source**

- › Area and 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 (2019).
- › Exports (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

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
- › Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

Patricia Kristel Alvarez Ordoñez and Pedro Molina, Dirección General Agrícola (DGA – MINAGRI). Secretaría 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 (not all with updates):
- › Bioagricert, Bologna, Italy
- › CERES-CERT: Frick, Switzerland, www.ceres-cert.com
- › 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
- Exports (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 producers (2020): Eurostat database, Eurostat, Luxembourg
- › Retail sales: Biokurier, Bydgoszcz. The data is based on wholesale turnover and therefore not directly comparable with the retail sales data from other countries.
- › Import data (MT): European Commission/Traces
- › Exports to the US (MT): GATS/USDA

Portugal**Source**

- › Organic land and operators: Eurostat database, Luxembourg
- › Market data (2011): INTERBIO, <http://www.interbio.pt>
- › Import data (MT): European Commission/Traces
- › Exports to the US (MT): GATS/USDA

Puerto Rico

Certifier data (from 2016).

Réunion**Source**

- › Agence Bio, Montreuil-sur-Bois, France. www.agencebio.org

Romania**Sources**

- › Organic area, land use, livestock and production: Eurostat database, Luxembourg.
- › 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
- › Exports to the US (MT): GATS/USDA

Russian Federation**Source**

- The area data was compiled by FiBL based on the data of the following international certifiers:
- › CERES-CERT, Frick, Switzerland
- › Ecoglobe - Organic control and certification body, Yerevan, Republic of Armenia, www.ecoglobe.am
- › LETIS, Rosario, Santa Fe, Argentina

› Organización Internacional Agropecuaria (OIA), Buenos Aires, Argentina (2019 data)
 Market data (retail sales): Prusso, Giuseppe (2019): Il Mercato dei Prodotti Bio nella Federazione Russa. Presentation by Prusso, Giuseppe of the Italian Trade Agency at Sana, Bologna, September 6, 2019
 Exports (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.
 › Exports (MT) to EU and USA: European Commission/Traces, USDA

Saint Lucia

Certifier data

Saint Pierre and Miquelon

› Area and operator data were not received.

Samoa**Source**

› Area and operators: Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int. To this data, the data of an international certifier were added.
 › Exports (MT) to EU: European Commission/Traces

Contact

Jim Pierce, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

Sao Tome and Prince**Source**

› Area and operators: Certifier data
 › Exports (MT) to EU: European Commission/Traces

Saudi Arabia**Source**

› Area and operators: Department of Organic Agriculture (DOA), <http://moa.gov.sa/organice/portale>
 › Exports (MT) to EU: European Commission/Traces

Contact

Raed Saleh Almusaylim; Manager of Control & Legislation Section, Department of Organic Production, Riyadh, Saudi Arabia

Senegal**Sources**

Area and operators:
 › CERTISYS, Bolline, Belgium, www.certisys.eu
 › Ecocert, Ouaga, Burkina Faso, www.ecocert.com
 › Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
 Exports (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 (from 2013), 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
 › Exports (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
 › Exports (MT) to EU: European Commission/Traces

Sierra Leone

› Area and operators: Certifier data. Not all certifiers provided updated data

› Exports (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.
 › Exports (MT) to EU: European Commission/Traces

Slovakia**Sources**

› Area, operators, livestock, and crop production (2021): Eurostat database, Luxembourg
 › 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 (2021): Eurostat database, Luxembourg
 › Retail sales (from 2021): 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

Solomon Islands**Source**

- › Area and operators: Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int
- › Exports (MT) to EU: European Commission/Traces

Contact

Jim Pierce, Secretariat of the Pacific Community (SPC), Suva Fiji, www.spc.int

Somalia

- › Certifier data.
- › Exports (MT) to EU: European Commission/Traces

South Africa**Sources**

- Area and operators
- › CERES-CERT, Frick, Switzerland
- › Control Union, Zwolle, The Netherlands, www.controlunion.org
- › Ecocert South Africa, Stellenbosch, South Africa
- › Kiwa BCS, Nürnberg, Germany, www.bcs-oeko.de
- Exports (MT) to EU and USA: European Commission/Traces, USDA

Spain**Sources**

- › Area and land use, operators: Ministerio de Agricultura, Pesca y Alimentación: Agricultura Ecológica 2023, Madrid, Spain
- › Retail Sales, export and import value: Ministerio de Agricultura, Pesca y Alimentación (2022) Análisis de la caracterización y proyección de la producción ecológica española en 2021. MAPA, Madrid
- › Import data (MT): European Commission/Traces
- › Exports (MT) to the US: GATS/USDA

Contact

Pedro López, Pro-Voc-Association, Madrid, Spain, www.provotec.es

Sri Lanka**Source**

- › Area and operators: National Organic Control Unit (NOCU), Colombo, Sri Lanka, www.nocu.lk
- › Export value (from 2015): Lanka Organic Movement
- › Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

M. D. Madhumali, Assistant Director, National Organic Control Unit (NOCU), Colombo, Sri Lanka

Sudan (former)

- › Area (wild collection): Certifier data
- › Exports (MT) to EU: European Commission/Traces

Suriname

- › Area: Certifier data
- › Exports (MT) to EU: European Commission/Traces

Sweden**Sources**

- › Area, livestock and operators: Eurostat database, Luxembourg
- › Market data: Ekologiska Lantbrukarna, Ekomatcentrum och Organic Sweden (2023) Ekologiska Årsrapporten 2022. Stockholm.
- › Import data (MT): European Commission/Traces
- › Exports (MT) to the US: GATS/USDA

Switzerland**Sources**

- › Land area and crop data, producers: Federal Agency for Statistics (BFS), Neuchatel, Switzerland.
- › Processors, importers: Bio Suisse, Basel, Switzerland
- › Retail sales: Bio Suisse, Basel, Switzerland, www.biosuisse.ch/de/bioin zahlen.php

Contact

Hans Ramseier, Bio Suisse, Basel, Switzerland

Syria

- › Area or operator data were not received.
- › Exports (MT) to EU: European Commission/Traces

Taiwan**Source**

- › Area and operators: Taiwan organic information Portal (2023): Yearly Report of Organic agricultural land and farm in Taiwan. Taiwan. <https://info.organic.org.tw/5138/>
- › Exports (MT) to EU and USA: European Commission/Traces, USDA

Tajikistan

Area and operators: Certifier data.

Tanzania**Sources**

- Area data
- › Bioinspecta, Frick Switzerland
- › CERES-CERT. Frick, Switzerland
- › Control Union, Zwolle, The Netherlands
- › Ecocert Southern Africa, Stellenbosch, South Africa
- › Textile Exchange
- Producers (2013): Tanzania Organic Movement (TOAM)
- Exports (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, Bangkok, Thailand.

› Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

Vitoon Panyakul, Green Net, 10330 Bangkok, Thailand, www.greenet.or.th.

Timor-Leste

› Area and operators: Certifier data.
› Exports (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-CERT-Frick, Switzerland
› CERTISYS, Bolline, Belgium, www.certisys.eu
› Ecocert, Ecocert West Africa, Ouagadougou, Burkina Faso, www.ecocert.com
› Letis, Buenos Aires, Argentina
› OneCert international, Jaipur, India
Exports (MT) to EU and USA: European Commission/Traces, USDA

Tonga

Source

› Certifier data (from 2019)

Tunisia

Source

› Area and operators : Direction Générale de L'Agriculture Biologique (DGAB), Tunis, Tunisia
› Exports (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 (Türkiye)

Source

› Area and operators: Ministry of Agriculture and Forestry, Ankara, Turkey, and Eurostat database, Eurostat, Luxembourg
› 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
› Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

Zeynep Rana Demirkan Ölmez, Republic of Turkey Ministry of Agriculture and Forestry, Ankara, Turkey

Uganda

Sources

› Area and operators: Bonabana et al. (2022): Organic Agriculture Statistics in Uganda. Makerere University, Kampala, Uganda
While the total organic farmland area is from this study, additional crop information from 2 certifiers and from Textile Exchange (2021 data) was added; however, this data is not complete.
› Exports (MT) to EU and USA: European Commission/Traces, USDA

Ukraine

Sources

› Area and operator data: Ministry of Agrarian Policy and Food of Ukraine, Kyiv, Ukraine
› Crop data: The data are from the Ministry of Agrarian Policy and Food of Ukraine, which provided data on four major crops (grain maize, soybeans, sunflower, wheat) for the year 2021. No updates for the crop data were received.
› Domestic market (2022): Organic.Info, Kyiv, Ukraine, <https://organicinfo.ua/en/about-us/> (Data excludes retail sales of imported products)
› Exports (MT) to EU and USA: European Commission/Traces, USDA; Total exports: Organic.Info

Infographics

› Infographics with data are available at <https://organicinfo.ua/en/infographics/>

Contact

Maryna Kyslytska, The Ministry of Agrarian Policy and Food of Ukraine, kyslytskaminagro@gmail.com.

United Arab Emirates

Source

› Area and operators: Ministry of Environment and Water (MOEW), United Arab Emirates. Crop details from certifiers were added.
› Exports (MT) to the USA: USDA

United Kingdom

Sources

› Land use details/crops/operators: DEFRA, London UK
› Market data: Soil Association (2023): Organic Market Report 2022. Soil Association, Bristol.
› Exports (MT) to EU and USA: European Commission/Traces, USDA

Contacts

Lee Holdstock, Soil Association, Bristol, UK

United States of America

Source

› Land area and producers (2021): 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
- › Exports (MT) to EU: European Commission/Traces

Uruguay

- › Area and operators: Certifier data
- › Exports (MT) to EU and USA: European Commission/Traces, USDA

Uzbekistan

- › Area and operators: Certifier data and Textile Exchange, <https://textileexchange.org/>
- › Exports (MT) to EU: European Commission/Traces

Vanuatu

Source

- › Area and operators: Pacific Organic and Ethical Trade Community (POETCom), Suva Fiji, www.spc.int

Contact

- › Jim Pierce, 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.

- › Exports (MT) to EU and USA: European Commission/Traces, USDA

Note

Please note that for the area and operator numbers, some PGS figures were included.

Contact

Nguyễn Thị Hồng Ngọc, Vietnam Organic Agriculture Association, Hanoi, Vietnam

Yemen

Other than in the past, no data was received.

Zambia

Source

- › Area and operators: Ecocert South Africa, Stellenbosch, South Africa
- › Exports (MT) to EU and USA: European Commission/Traces, USDA

Contact

Kyle Albertyn and Daniël Kotzé, Ecocert South Africa, Stellenbosch, South Africa

Zimbabwe

Source

- › Area and operators: Ecocert South Africa, Stellenbosch, South Africa
- › Exports (MT) to EU: European Commission/Traces

Contact

Kyle Albertyn and Daniël Kotzé, Ecocert South Africa, Stellenbosch, South Africa

About the FiBL Survey

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-CERT, Certisys, Control Union, Ecocert, Mayacert, Ecoglobe, Ekoagros, ICEA, Imocert, Kiwa BCS Oko-Garantie GmbH, 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 188 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 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.

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/>.

Definitions/Explanations

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 is especially relevant for numerous African countries. The number of producers is, therefore, probably higher than the number communicated in this report.

Retail sales 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.

Export/Import data: For exports and import volumes FiBL used its own classification. It is working on the harmonisation with the EU and US classification.

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 Flores et al. on page 121).

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 grouped 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 335).

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



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Organic agriculture is a widespread practice, spanning nearly 190 countries, with over 96 million hectares of farmland managed organically by approximately 4.5 million farmers. Remarkably, the global sales of organic food and beverages surged to nearly 135 billion euros in 2022.

The 25th edition of “The World of Organic Agriculture,” jointly published by the Research Institute of Organic Agriculture FiBL and IFOAM – Organics International, serves as an exhaustive resource offering a comprehensive overview of the recent developments in the global organic farming landscape. The publication features intricate statistics on various aspects of organic farming, encompassing the extent of organic land management, land use patterns, crop choices, the number of farms, and diverse operator types. Additionally, it provides insights into retail sales figures and international trade data.

Furthermore, this book incorporates valuable contributions from experts and representatives of the organic sector worldwide. These contributions delve into topics including the global organic food market, trends in organic imports, as well as regulations and policies governing organic agriculture. The publication not only sheds light on the current state of organic farming but also anticipates emerging trends in organic agriculture across regions such as Africa, Asia, Europe, Latin America, North America, and Oceania. It also includes detailed reports on individual countries.

The latest data are presented annually at BIOFACH in Nuremberg, Germany. In 2025, BIOFACH will be held from 11 – 14 February.

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