



THE WORLD OF ORGANIC AGRICULTURE

STATISTICS & EMERGING TRENDS 2006

AUSTRALIA / OCEANIA 12,2 MILLION HA

ASIA 4,1 MILLION HA

AFRICA 1,0 MILLION HA

EUROPE 6,5 MILLION HA

LATIN AMERICA 6,4 MILLION HA

NORTH AMERICA 1,4 MILLION HA





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ORGANIC AGRICULTURE**

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All of the statements, results etc. contained in this book have been compiled by the authors according to their best knowledge and have been scrupulously checked by the Research Institute of Organic Agriculture (FiBL), the Foundation Ecology & Agriculture (SOEL) and the International Federation of Organic Agriculture Movements (IFOAM). However, the possibility of mistakes cannot be ruled out entirely. Therefore, the editors and the authors are not subject to any obligation and make no guarantees whatsoever regarding any of the statements etc. in this work; neither do they accept responsibility or liability for any possible mistakes contained therein.

Additional information (links, graphs) is available from the internet at www.soel.de/oekolandbau/weltweit.html. Information about organic farming around the globe is provided at www.ifoam.org.

Should corrections and updates of this report become necessary, they will be published at www.organic-europe.net.

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5 ORGANIC FARMING WORLDWIDE 2006: OVERVIEW & MAIN STATISTICS

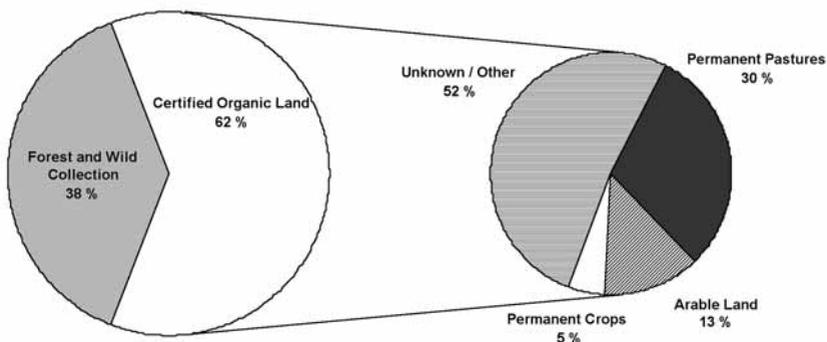
MINOU YUSSEFI¹

5.1 Global Overview

Organic agriculture has developed rapidly worldwide during the last few years and is now practiced in approximately 120 countries of the world. Its share of agricultural land and farms continues to grow. Furthermore, it can reasonably be assumed that uncertified organic farming is practiced in even more countries.

The Foundation Ecology & Agriculture SOEL and the Research Institute of Organic Agriculture FiBL have collected data about organic farming worldwide every year since 1999. Since the publication of the 2003 results, IFOAM has collaborated in the project.

According to the latest survey, more than 31 million hectares are currently managed organically by at least 623'174 farms worldwide (see corresponding tables). The eighth edition of this study includes figures for the area of certified forest and 'wild harvested plants', which adds at least another 19.7 million hectares, summing up to more than 51 million hectares in total. The market for organic products is also growing, not only in Europe and North America (which are the major markets), but also in many other countries, including several developing countries (see chapter on the global organic market).



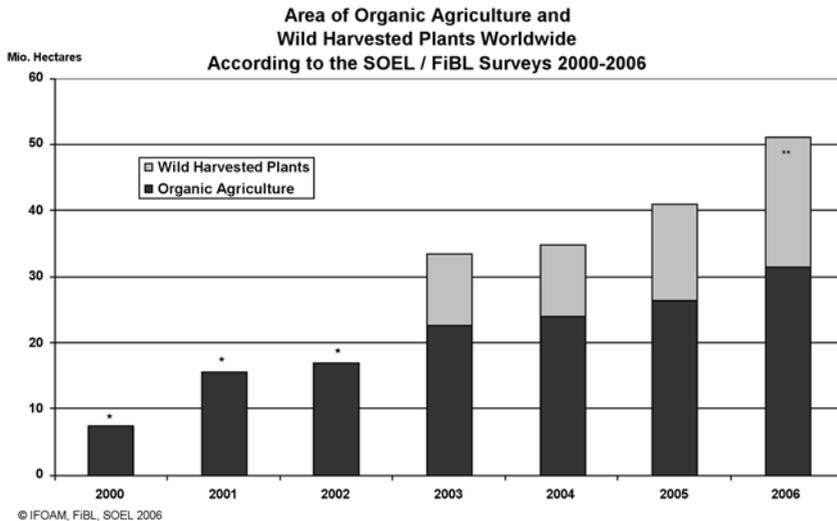
Graph 2: Land use of the certified area worldwide, Source: FiBL Survey 2005 / 2006

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Currently, the countries with the greatest organic areas are Australia (12.1 million hectares), China (3.5 million hectares) and Argentina (2.8 million hectares). The percentages, however, are highest in Europe.

In total, Oceania holds 39 percent of the world's organic land, followed by Europe (21 percent) and Latin America (20 percent). The proportion of organically compared to conventionally managed land, however, is highest in Europe. Latin America has the greatest total number of organic farms.

For detailed information about the main land use in organic agriculture see the next chapter. The continued increase in the organic land area over the last years is not just due to the ever-greater interest in organic farming, but also a result of improved access to information and data collection each time the study is updated. Despite this fact, we would like to give an overview of the last year's results as it reflects a general development.



Graph 3: Area of organic agriculture and wild harvested plants worldwide 2000-2006

* No data collection of wild harvested plants

** Forest and wild harvested plants

Source: SOEL and FiBL Surveys 2000-2006

5.2 *Organic Agriculture by Continent*

Australia & Oceania

This area includes Australia and New Zealand as well as smaller countries like Fiji, Papua New Guinea, Tonga and Vanuatu. Altogether, more than 12.1 million hectares and 2'662 farms are under organic management here. Most of this area is pastoral land for low intensity grazing in Australia (unfortunately it was not possible to get precise figures yet). Therefore, one organic hectare in Australia is not directly equivalent to one organic hectare in Denmark, for example, due to its level of productivity. That means comparing countries must be done carefully.

Important areas of production in Australia include fruit and vegetables, which are produced all year around, beef and dairy products (a rapidly growing sector) as well as grain, wool and sheep meat. In New Zealand, the biggest organic sectors so far are kiwifruit and apples. Growth in the organic industry in Australia has been strongly influenced by rapidly growing overseas demand. The key market for export of Australian organic products is Europe - in particular the UK, Italy, Switzerland, France, the Netherlands and Germany - accounting for over 70 percent of Australian organic exports. There is some government support to encourage organic agriculture per se. However, there are no subsidies for organic agriculture, neither in Australia nor in New Zealand. Australia has had national standards for organic and biodynamic products in place since 1992, and it is one of the countries on the third country list of the European Union. While these standards are only enforced for export products, they do act as an informal standard domestically. The term 'organic' is not protected in the domestic market place and widespread use of the term for uncertified products creates consumer confusion. In New Zealand a National Organic Standard was launched in 2003, underpinning the various certification schemes that already exist. New Zealand is also on in the EU-third country list.

While trends of rising consumer demand for organics are becoming discernible, the organic food market in Australia is still considered a niche market. On the domestic market, organic produce receives a substantial price premium over that of conventionally grown produce. Imported products are not only food and drinks, of which more than half is processed, but increasingly non-edible items such as cotton and personal care products are imported, primarily from New Zealand, the USA and the UK.

Latin America

In Latin America many countries have more than 100'000 hectares of organic land, and having started from a recent low level are now experiencing extraordinary growth rates. The total organically managed and certified area is now almost 6.4 million hectares, with an additional 6 million hectares certified as forest and 'wild harvested' areas. Almost all Latin American countries have an organic sector, though the level of development varies widely. The countries with the highest proportion of organic land are Uruguay, Costa Rica and Argentina. A major part of the 2.8 million organic hectares in Argentina are extensive grassland.

In general, the organic movement in Latin America has grown through its own efforts. No government provides direct subsidies or economic aid for organic production. The bright

exception is Brazil, where the government recently issued an inter-ministerial Pro Organic Plan, officially stimulating organic production, research, association building, marketing and trade. Costa Rica and some others have official funding for research and teaching, Argentina and Chile have had official export agencies helping producers attend international fairs and print product catalogues, and in Mexico there is a growing interest from national and state agencies. In places there has been seed funding for extension and association building from international aid agencies, especially from Germany, the Netherlands and Switzerland.

Export is still the main organic activity in Latin America. From the coffee grains and bananas of Central America, to the sugar in Paraguay and the cereals and meat in Argentina, the trade of organic produce has been mostly oriented towards foreign markets.

Europe

Since the beginning of the 1990s, organic farming has rapidly developed in almost all European countries. Growth has, however, slowed down recently. In 2004 in Europe, 6.5 million hectares were managed organically by around 167'000 farms. In the European Union more than 5.8 million hectares are under organic management, and there are almost 140'000 organic farms. This constitutes 3.4 percent of the agricultural area. The country with the highest number of farms and the largest organic area is Italy. In most countries of Europe and particularly the European Union organic farming is supported with legislation and direct payments. In the European Union the European Organic Action Plan implementation process is now getting under way.

North America

In North America almost 1.4 million hectares are managed organically, representing approximately a 0.3 percent share of the total agricultural area. Currently, the number of farms is almost 12'000. With the US national rule in place, the organic sector has been able to provide a guarantee to consumers that those organic products using the new labeling mean that specific practices were followed. The US market has seen more and more organic products being introduced, the number of certification agencies accredited by USDA has grown, and talks are progressing to expedite international trade of organic products. Since 1999, the Canadian industry has had a voluntary Canada Organic Standard that is not supported by regulation. The organic industry continues to devote its energies toward implementation of a mandatory national organic regulation to help expedite trade relations with such major trading partners as the United States, European Union, and Japan.

The North American market for organic products is reporting the highest growth worldwide. Organic food and drink sales in the US were estimated to have totaled approximately 14.5 billion USD in 2005. Consumer demand for organic products remains buoyant and the region is expected to account for most global revenues in the foreseeable future.

Asia

In Asia, the area under organic management has been comparatively small in the past years, but in China there has been a large increase of nearly three million hectares in the year 2004, which is dedicated to pastoral land that has not been certified before. The total organic area in Asia is now about 4.1 million hectares, managed by almost 130'000 farms. Additionally, 6.4 million hectares are certified as forest and 'wild harvested' areas. Among the more significant countries producing organic products are China, India and Russia. For many countries there are still no precise figures available, but a number of countries where activities were not recorded previously reported data this time.

There are 117 certification bodies operating in Asia from which 104 are placed in China, India and Japan. However, most of the exporters continue to be certified by foreign certification bodies operating in the region. The majority of activities and development in the region is happening without market regulation and certification. Organic rules are already in place in a number of Asian countries including India, Japan, Korea, Philippines, Taiwan and Thailand. Organic rules tend to be mandatory in importing countries and voluntary in exporting countries. Only Israel has attained equivalency status with the regulation of the EU.

The highest reported domestic market growth, estimated to be up to 30 percent, is in China and an organic boom seems to be taking place in Indonesia. The range of marketing channels is diverse, as are market conditions from rural India to Tokyo, including ad hoc organic bazaars, small retail shops, supermarkets, multi-level direct selling schemes and internet marketing. Exports are still largely composed of fresh produce and low-value commodity crops. Recently, aquaculture, particularly shrimp farming, is becoming popular, with projects in China, Indonesia, Thailand and Vietnam.

Africa

In Africa, organic production is rarely certified, and for many countries new figures were not available. Nevertheless, organic farming is increasing in Africa, especially in the southern countries. An important growth factor in Africa is the demand for organic products in the industrialized countries. Another motivation is the maintenance and building of soil fertility on land threatened by degradation and erosion. More than 1 million hectares are now managed and certified organic. Additionally, 6.8 million hectares are certified as forest and 'wild harvested' areas. With a few exceptions (notably Egypt and South Africa) the African market for organic produce is very small. This is due both to low-income levels and an undeveloped infrastructure for inspection and certification. Most certified organic production in Africa is geared towards export markets, with the large majority being exported to the EU, which is Africa's largest market for agricultural produce. At present Tunisia is the only African country with its own organic (EU compatible) standards, certification and inspection system. Egypt and South Africa have both made significant progress in this direction; both have two certifying organizations and are well on the way to developing standards.

The data shown in the tables below includes fully converted land as well as “in conversion” land area.

Table 3: Area under organic management by country

COUNTRY	ORGANIC LAND AREA (HECTARES)
Australia	12'126'633
China	3'466'570
Argentina	2'800'000
Italy	954'361
USA	889'048
Brazil	887'637
Germany	767'891
Uruguay	759'000
Spain	733'182
UK	690'270
Chile	639'200
France	534'037
Canada	488'752
Bolivia	364'100
Austria	344'916
Mexico	295'046
Czech Rep.	260'120
Peru	260'000
Greece	249'488
Ukraine	241'980
Sweden	206'579
Portugal	206'524
Sudan	200'000
Zambia	187'694
Kenya	182'438
Bangla Desh	177'770
Finland	162'024
Tunisia	155'323
Denmark	154'921
Hungary	128'690
Uganda	122'000
Switzerland	121'387
India (provisional)	114'037
Turkey	108'597
Slovak Republic	93'943
Paraguay	91'414
Poland	82'730
Romania	75'000
Dominican Rep.	72'425

COUNTRY	ORGANIC LAND AREA (HECTARES)
Lithuania	64'545
Nicaragua	59'000
Tanzania	55'867
Indonesia	52'882
Netherlands	48'152
Estonia	46'016
New Zealand	45'000
South Africa	45'000
Latvia	43'902
Norway	41'035
Kazakhstan	36'882
Colombia	33'000
Ireland	30'670
Russia	30'000
Japan	29'151
Korea, Republic of	28'218
Ecuador	27'436
Egypt	24'548
Belgium	23'728
Slovenia	23'032
Serbia/Montenegro	20'542
Pakistan	20'310
Azerbaijan	20'105
Morocco	20'040
Ghana	19'132
Venezuela	16'000
Sri Lanka	15'379
Guatemala	14'746
Philippines	14'134
Costa Rica	13'945
Thailand	13'900
Saudi Arabia	13'730
Syria	12'500
Bulgaria	12'284
Moldova	11'075
Cuba	10'445
El Salvador	9'100
Croatia	7'355
Cameroon	7'000
Vietnam	6'475
Israel	5'960
Panama	5'244
Iceland	4'910
Luxemburg	3'158

COUNTRY	ORGANIC LAND AREA (HECTARES)
Senegal	2'500
Belize	1'810
Honduras	1'823
Algeria	1'400
Jamaica	1'332
Taiwan	1'092
Lebanon	1'039
Cyprus	1'018
Nepal	1'000
Palestine	1'000
Zimbabwe	1'000
Liechtenstein	984
Albania	804
Malaysia	600
Mozambique	600
Armenia	598
Benin	400
Kyrgyzstan	400
Malawi	325
Bosnia Herzegovina	310
Fiji	200
Iran,	200
Macedonia, The Fmr Yug Rep.	192
Mali	170
Mauritius	150
Madagascar	129
Guyana	109
Togo	90
Trinidad & Tobago	80
Laos	60
Rwanda	50
Georgia	48
Burkina Faso	30
Jordan	30
Malta	13
Niger	12
Total organic area covered by the FiBL survey 2005 / 2006	31'502'786

Table 4: Land under organic management in percent of the total agricultural area by country

COUNTRY	ORGANIC AREA IN % OF THE TOTAL AGRICULTURAL AREA
Liechtenstein	26.40
Austria	13.53
Switzerland	11.33
Finland	7.31
Sweden	6.80
Italy	6.22
Czech Rep.	6.09
Denmark	5.76
Portugal	5.42
Estonia	5.17
Uruguay	5.10
Slovenia	4.55
Germany	4.52
UK	4.39
Slovak Republic	4.19
Chile	4.19
Norway	3.95
Spain	2.87
Greece	2.72
Australia	2.71
Netherlands	2.49
Luxemburg	2.49
Hungary	2.19
Bangla Desh	1.97
Dominican Rep.	1.96
Lithuania	1.86
France	1.80
Latvia	1.77
Belgium	1.70
Tunisia	1.59
Argentina	1.58
Korea, Republic of	1.46
Belize	1.19
Israel	1.05
Uganda	0.99
Bolivia	0.99
Peru	0.85
Nicaragua	0.83
Canada	0.72
Egypt	0.72
Cyprus	0.71

COUNTRY	ORGANIC AREA IN % OF THE TOTAL AGRICULTURAL AREA
Ireland	0.70
Kenya	0.69
Guatemala	0.33
Sri Lanka	0.65
China	0.60
Ukraine	0.58
Japan	0.56
El Salvador	0.53
Zambia	0.53
Romania	0.51
Poland	0.49
Costa Rica	0.49
Moldova	0.44
Azerbaijan	0.43
Serbia/Montenegro	0.37
Ecuador	0.34
Paraguay	0.37
Brazil	0.34
Lebanon	0.32
Mexico	0.27
Palestine	0.26
Turkey	0.26
Jamaica	0.26
Panama	0.24
Croatia	0.23
New Zealand	0.26
Bulgaria	0.23
USA	0.22
Iceland	0.22
Cuba	0.16
Sudan	0.15
Tanzania	0.14
Mauritius	0.13
Ghana	0.13
Malta	0.13
Indonesia	0.12
Philippines	0.12
Syria	0.09
Cameroon	0.08
Pakistan	0.07
Venezuela	0.07
Colombia	0.07
Albania	0.07

COUNTRY	ORGANIC AREA IN % OF THE TOTAL AGRICULTURAL AREA
Thailand	0.07
Vietnam	0.07
Morocco	0.07
India (provisional)	0.06
Honduras	0.06
Trinidad & Tobago	0.06
South Africa	0.05
Fiji	0.04
Armenia	0.04
Senegal	0.03
Nepal	0.02
Kazakhstan	0.02
Macedonia, The Fmr Yug Rep.	0.02
Bosnia Herzegovina	0.01
Russia	0.01
Benin	0.01
Saudi Arabia	0.01
Malaysia	0.01
Malawi	0.01
Guyana	0.01

Source: FiBL Survey 2005/2006

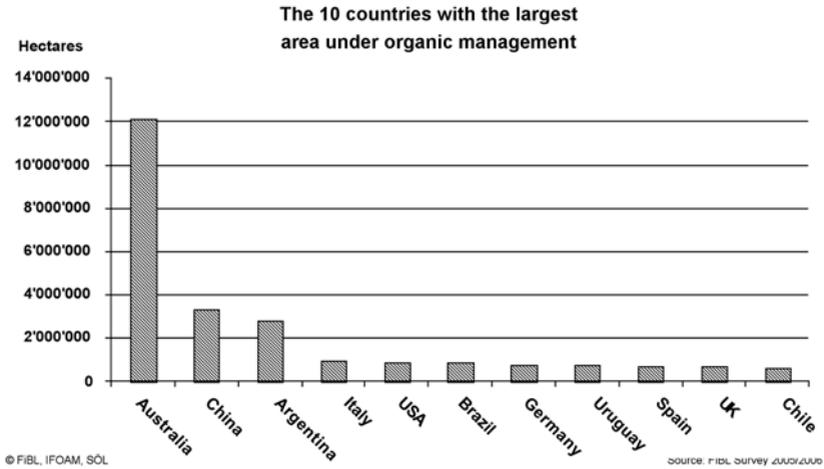
Table 5: Organic farms worldwide by country

COUNTRY	NUMBER OF ORGANIC FARMS
Mexico	120'000
Indonesia	45'000
Italy	36'639
Philippines	34'990
Uganda	33'900
Tanzania	30'000
Kenya	30'000
Korea, Republic of	28'951
Peru	23'400
Austria	19'826
Germany	16'603
Spain	16'013
Brazil	14'003
Turkey	12'806
Morocco	12'051
France	11'059
Greece	8'269
USA	8'035

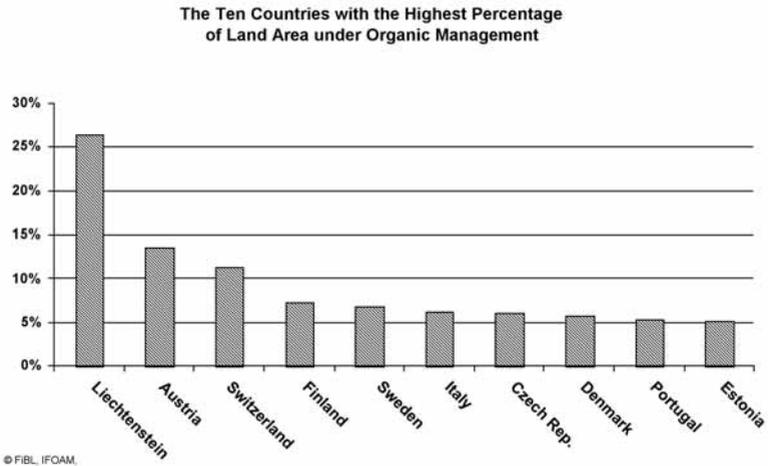
COUNTRY	NUMBER OF ORGANIC FARMS
Bolivia	6'500
Switzerland	6'373
Cuba	5'222
India (provisional)	5'147
Mozambique	5'000
Finland	4'887
Japan	4'539
Colombia	4'500
UK	4'010
Costa Rica	3'987
Poland	3'760
Canada	3'673
Sri Lanka	3'301
Denmark	3'166
Sweden	3'138
Serbia/Montenegro	3'000
Honduras	3'000
Senegal	3'000
Guatemala	2'830
Paraguay	2'827
Thailand	2'498
Norway	2'484
Ecuador	2'427
Zambia	2'425
Australia	1'832
Argentina	1'824
Lithuania	1'811
Hungary	1'583
Slovenia	1'568
Netherlands	1'469
Portugal	1'302
Nepal	1'247
Romania	1'200
China	1'560
Latvia	1'043
Vietnam	1'022
Chile	1'000
Ireland	897
Czech Rep.	836
New Zealand	820
Dominican Rep.	819
Estonia	810
Belgium	712
Sudan	650

COUNTRY	NUMBER OF ORGANIC FARMS
Benin	650
Tunisia	608
Uruguay	500
Palestine	500
Israel	400
Bulgaria	351
Azerbaijan	332
Croatia	265
South Africa	250
Kyrgyzstan	230
Cyprus	225
Slovak Republic	218
Bosnia Herzegovina	122
Moldova	121
Bangla Desh	100
Ukraine	72
Luxemburg	66
Albania	57
Macedonia, The Fmr Yug Rep.	50
Liechtenstein	42
El Salvador	37
Pakistan	28
Guyana	28
Syria	26
Iceland	25
Malta	20
Russia	15
Malawi	13
Georgia	13
Jamaica	12
Armenia	11
Rwanda	10
Fiji	10
Panama	7
Laos	5
Venezuela	4
Saudi Arabia	3
Kazakhstan	1
Jordan	1
Togo	1
Iran	1
Total Farms	622'782

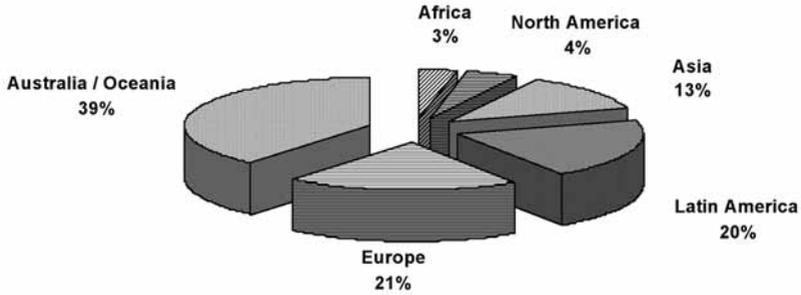
Source: FiBL-Survey 2005/ 2006



Graph 4: Land area under management: The 10 countries with the largest organic area
Source: FiBL-Survey 2005/ 2006

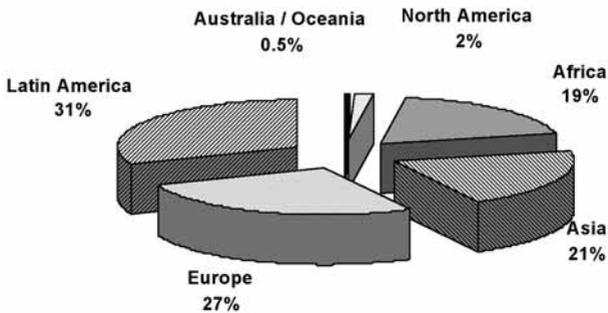


Graph 5: The ten countries with the highest percentage of land area under organic management
Source: FiBL-Survey 2005/ 2006



Graph 6: Area under organic management – share per continent

Source: FiBL-Survey 2005/ 2006



Graph 7: Organic farms – share per continent

Source: FiBL-Survey 2005/ 2006