Data collection on organic agriculture worldwide

Helga Willer, Research Institute of Organic Agriculture (FiBL), CH-Frick
Presentation at the event Closing the information gap - Opportunities and challenges for policymakers – building understanding of sustainability standards
31 January 2014
Palais des Nations, Geneva, Switzerland, Conference room XXVI, 3 p.m. to 6 pm
The Global Survey on Organic Agriculture: Supporters

› The Swiss State Secretariat of Economic Affairs SECO

› Nürnberg Messe, the organizers of the BIOFACH Fait

› Collaboration with the International Federation of Organic Agriculture Movements (IFOAM) on data collection and on the publication of the book

› 200 experts from all parts of the world contribute to the annual survey on organic agriculture worldwide
The 15th edition of 'The World of Organic Agriculture', was published by FiBL and IFOAM in February 2014.*

Contents:

- Results of the survey on organic agriculture worldwide;
- Organic agriculture in the regions and country reports;
- Australia, Canada, Croatia, the Pacific Islands, United Arab Emirates, and The United States of America.
- Chapters on the global market, standards & legislations, voluntary standards, PGS, European market and tea production in China
- Numerous tables and graphs.
- The book can be ordered via IFOAM.org and shop.FiBL.org.

The 15th survey on organic agriculture worldwide (data end of 2012)

- The 15th survey on organic agriculture worldwide was carried out by the Research Institute of Organic Agriculture FiBL in cooperation with the International Federation of Organic Agriculture Movements (IFOAM) and further partners.
- The survey was carried out between July 2013 and January 2014.
- Data were received from 164 countries.
- Updated data on area and producers were available for 129 countries.
- Data were provided by 200 country experts (representatives from NGOs, certification bodies, governments, researchers).
The 15th survey on organic agriculture worldwide

The following data are collected

- Land under organic management (including land use and crop details);
- Production values and volumes;
- Producers, other operator types;
- Domestic market values and volumes;
- Export and import data;
- Livestock data (animal heads and production tones).

The results are published in the yearbook “The World of Organic Agriculture” and at www.organic-world.net.
# Countries and territories covered by the global survey on organic agriculture 2011

<table>
<thead>
<tr>
<th>Region</th>
<th>Countries with data on organic agriculture</th>
<th>Countries per region</th>
<th>Share of countries that provided data (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa</td>
<td>37</td>
<td>57</td>
<td>65</td>
</tr>
<tr>
<td>Asia</td>
<td>37</td>
<td>49</td>
<td>76</td>
</tr>
<tr>
<td>Europe</td>
<td>46</td>
<td>46</td>
<td>100</td>
</tr>
<tr>
<td>Latin America and Caribbean</td>
<td>29</td>
<td>45</td>
<td>64</td>
</tr>
<tr>
<td>North America</td>
<td>2</td>
<td>5</td>
<td>40</td>
</tr>
<tr>
<td>Oceania</td>
<td>11</td>
<td>23</td>
<td>49</td>
</tr>
<tr>
<td>World</td>
<td>162</td>
<td>224</td>
<td>72</td>
</tr>
</tbody>
</table>

*Where the designation "country" appears in this book, it covers countries or territories.*

Source: FiBL-IFOAM Survey 2013

Source: FiBL & IFOAM 2013
Distribution of organic agricultural land by region 2012

Source: FiBL-IFOAM Survey 2014

- Oceania: 32%
- Europe: 30%
- Latin America: 18%
- Northern America: 8%
- Asia: 9%
- Africa: 3%
Growth of the organic agricultural land 1999-2012

Source: FiBL-IFOAM-SOEL-Surveys 1999-201
The ten countries with the largest areas of organic agricultural land 2012

Source: FiBL-IFOAM survey 2014

- Australia (2009): 12.0 million hectares
- Argentina: 3.6 million hectares
- United States of America (2011): 2.2 million hectares
- China (2011): 1.9 million hectares
- Spain: 1.6 million hectares
- Italy: 1.2 million hectares
- Germany: 1.0 million hectares
- France: 1.0 million hectares
- Uruguay (2006): 0.9 million hectares
- Canada: 0.8 million hectares

Million hectares
The ten countries with the highest shares of organic agricultural land 2012

Source: FiBL-IFOAM survey 2014

<table>
<thead>
<tr>
<th>Country</th>
<th>Share of total agricultural land</th>
</tr>
</thead>
<tbody>
<tr>
<td>Falkland Islands (Malvinas)</td>
<td>36.3%</td>
</tr>
<tr>
<td>Liechtenstein</td>
<td>29.6%</td>
</tr>
<tr>
<td>Austria</td>
<td>19.7%</td>
</tr>
<tr>
<td>Sweden</td>
<td>15.6%</td>
</tr>
<tr>
<td>Estonia</td>
<td>15.3%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>12.0%</td>
</tr>
<tr>
<td>Samoa</td>
<td>11.8%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>11.5%</td>
</tr>
<tr>
<td>Latvia</td>
<td>10.8%</td>
</tr>
<tr>
<td>French Guyana</td>
<td>10.6%</td>
</tr>
</tbody>
</table>


The ten countries with the largest numbers of organic producers 2012

Source: FiBL-IFOAM survey 2014

- India: 600'000
- Uganda: 189'610
- Mexico: 169'707
- Tanzania: 148'610
- Ethiopia: 134'626
- Turkey: 57'259
- Peru: 47'211
- Italy: 43'852
- Spain: 30'462
- Poland: 25'944

Number of producers

0  200'000  400'000  600'000  800'000
Global market: Distribution of retail sales value by single markets 2012 (total market: 64 billion USD or approx. 50 billion euros)

Source: FiBL-AMI-OrganicDataNetwork survey 2014, based on retail sales with organic food
Organic export values - the ten countries with the highest export values 2012

Source: FiBL-IFOAM survey 2014; in total for 41 countries data were available

- Italy: 1,200.0 million euros
- Netherlands: 783.0 million euros
- Spain: 589.7 million euros
- Mexico: 389.0 million euros
- Canada: 356.0 million euros
- France: 309.0 million euros
- India: 291.2 million euros
- China: 233.0 million euros
- Dominican Republic: 206.0 million euros
- Viet Nam: 204.0 million euros

Million euros
Distribution of main land use types
and crop categories 2012
Source: FiBL-IFOAM Survey 2014; based on information from the private sector, certifiers, and governments.

Land use types 2012

- Permanent Grassland 63%
- Arable crops 17%
- Other agr. Land 1%
- No details, 12%

Key arable crops
- Cereals 2.65
- Green fodders 2.34
- Oilseeds 0.64
- Protein crops 0.32
- Vegetables 0.24

Key permanent crops
- Coffee 0.70
- Olives 0.58
- Grapes 0.28
- Nuts 0.27
- Cocoa 0.20
Organic cropland (10 million ha) – share of crops analyzed for the SSI report

Source: FiBL 2013

- Crops SSI report: 13%
- Further organic arable and permanent crops: 87%
Organic agricultural land (37.4 million ha 2011) – share of organic crops analyzed for the SSI report (1.3 million ha)

Source: FiBL 2013
Questions

1. What is FiBL doing to facilitate data collection

2. What are some of the main challenges still facing data collection are and

3. Where could policy makers most effectively support the process of more robust data
1. What is FiBL doing to facilitate data collection

› Long-standing network (of 200 data providers)
  › Regular contact for latest data
  › Financial support for some data collectors
  › Free access to printed & PDF version of book
  › Access to selected data excerpts on request
  › BIOFACH as a meeting place
  › All data collectors and sources mentioned in book
1. What is FiBL doing to facilitate data collection

› Good tools: good questionnaire including data entering tool; easy data processing and data analysis; unique database with data back to 2000

› Regular (annual) data collection

› Dissemination efforts (book as the key tool, press release, website www.organic-world.net)
2. What are some of the main challenges still facing data collection (1)

- Data availability: in particular for production data, domestic market data, export and import data
- Governmental or private data collection systems mostly rely on data from the certifiers; but systems are often not developed;
- Problems with data from the certifiers
  - Certifiers are often reluctant to release their data,
  - Often they do not have time to compile the data for our purpose,
  - Not all have the data stored in a database.
Organic data collection systems world-wide 2011 for data on area, operators and production (total 162 countries)

- Government collection systems (70 countries)
  - Data from the certifiers
  - Census/farm structure survey
  - Direct payments
- Private collection systems (35 countries)
  - Data from the certifiers
  - Company data
- No collection system (55 countries)
  - FiBL and IFOAM collect the data from the international certifiers

Source: FiBL & IFOAM 2013
International certifiers that provided data for several countries (2011 data)
2. What are some of the main challenges still facing data collection (2)

- Problems of data quality
- Harmonisation problems (nomenclature and classification)
- Often data are aggregated (e.g. 10 hectares of cocoa, vegetables and mangos …)
- Data are often not provided in a database format; data storage takes a lot of time
- As data collection is for many countries mainly via personal contacts, it is very time consuming to collect the data.
- Biggest challenge for SSI the report: Production and export data are often not available; estimates had to be made
- Better knowledge base is needed in order to do these estimates, or better even: Real data
3. Where could policy makers most effectively support the process of more robust data

› Increase availability of data by making data collection obligatory
  (e.g. in the EU regulation on organic farming, EU member states are requested to deliver data annually for publication at the Eurostat website)

› Harmonize product classification and nomenclature

› For trade data: Include customs code for organic products so that these can be identified

› Include data collection in national action plans
3. Where could policy makers most effectively support the process of more robust data

- Support the setting up of national data collection systems for organic data, covering all indicators and provide the necessary tools for data collection, processing, storage, quality checks, data analysis as well as a guidance on methodology.

- Learn from and highlight good examples of successful data collection systems (for instance European Union, Peru, Argentina, Tunisia, Thailand)

- Support a continual international exchange on data collection issues (conferences? Online forum? working groups on crop-related issues? increase collaboration with FAO?)
Contact

› Helga Willer
Research Institute of Organic Agriculture (FiBL)
Ackerstrasse 113
5070 Frick
Switzerland
Tel. +41 62 865 7270
Fax +41 62 865 7273
helga.willer@fibl.org
www.fibl.org