2020
Edition

ORGANIC SECTOR IN THE WORLD

International publications by Agence BIO
2020 Edition

AB
AGRICULTURE
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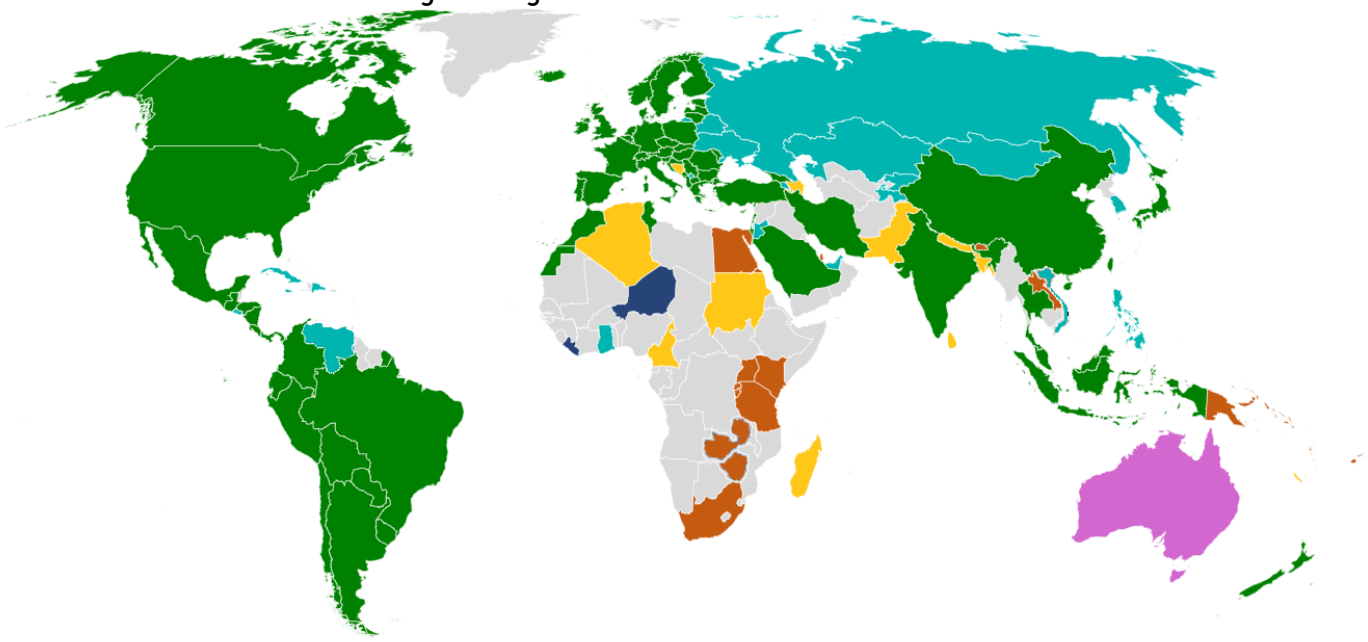
Table of contents

Inventory of regulations and equivalence agreements

Organic Regulations

■ 103 countries had regulations for organic farming by the end of 2019. It was in preparation in other countries.

Organic regulations around the world



Source: Agence BIO/FIBL/IFOAM/Australian Organic Ltd

■ The US Department of Agriculture has decided to revise the organic regulations of the National Organic Program. The proposed changes aim to protect the integrity of the organic supply chain and strengthen consumer and industry confidence in the national organic label, by consolidating organic control systems, improving traceability from farm to market and ensuring rigorous application of organic regulations. The changes will concern, especially exemptions from organic certification, import certificates[1], product traceability, training of certification bodies agents, unannounced inspections, labeling, compliance and calculation of the organic content of multi-ingredient products. The proposed changes respond to longstanding demands from the organic industry for stronger measures to counter fraud.

1- All organic products entering the United States will need a NOP electronic import certificate or equivalent.

■ Canadian organic standards have been revised, as part of its regular five-year review process. The new standards were due to be published at the end of 2020 and should become mandatory as of November 2021. Canada will then review its equivalency agreements with other countries.

■ The new EU organic farming regulation[1] was published in June 2018. The European Commission has postponed its entry into force for a year at the request of Member States, the European Parliament, Third Countries and other stakeholders[2]. It will therefore come into force on January 1st, 2022. Too much delay had been taken in finalizing secondary regulations, due to the Covid-19 pandemic. This will also ensure a smooth transition between current and future legislation and ensure that the industry and Member States are fully prepared to apply the new standards.
Until August 26, 2020, the European Commission has put up for consultation an implementing act for the new European organic regulation, which specifies the control procedures and oversees group certification.
Regulatory changes affect production, controls and imports. Regarding production, new products will be able to be certified organic in the European Union: cotton, wool, leather and salt. The use of heterogeneous plant reproductive material will be permitted. Foods containing nanoparticles cannot be certified organic. Operators selling prepackaged products will be exempt from certification and notification for distribution. Operators selling small quantities of unpackaged organic products could also be exempted. All organic operators can be checked at least once a year in the field. Those for which previous checks have shown no non-compliance during the last three years can only be checked every two years.
Regarding imports, equivalence will be replaced by conformity. Products imported into the European Union will have to comply with European regulations. Equivalent specifications will only be recognized under bilateral trade agreements or other existing agreements. There will be a transition period between the two systems. The European Union is giving itself five years to negotiate such agreements with its partners. The European Commission will have the possibility of granting specific authorizations for the use of products and substances in Third Countries and its outermost regions, considering the differences in ecological balance in production, particular climatic conditions, traditions and local conditions. These specific authorizations may be granted for a renewable period of two years.

■ From January 1st, 2020, the Organic Food Law[3] entered into force in Russia. The accreditation of certification bodies by the national authority Rossakreditazija has become a prerequisite for operating in this country.

■ In 2020, Russia, Armenia, Belarus, Kazakhstan and Kyrgyzstan established a roadmap to finalize a treaty to harmonize their organic regulations.

1- N°2018/848
2- Including IFOAM
3- Federal Law n ° 280-FZ 3 August 2018

ORGANIC SECTOR IN THE WORLD

- China has revised its organic regulations. It has applied since January 1st, 2019. Group certification is now done once a year. The new regulations aim to make it easier to import organic products from other continents.

- Japan revised its regulations and implemented specifications for organic products in restaurants in January 2019.

- Australia has organic regulations for exported products, but not for its domestic market. The organic standard has been revised. The new rules will come into effect in 2021.

- In March 2020, the New Zealand government introduced a bill to Parliament to strengthen the regulation of organic products. The main goal is to increase consumer confidence.

Equivalence Agreements

■ Equivalency agreements are provisions that eliminate the need for double certifications, thereby reducing fees, inspections and paperwork.

■ Several equivalency agreements have been signed. The following table shows the main ones.

Equivalence agreements on organic products in 2020

	USA	Canada	European Union	UK	Switzerland	China	Japan	Republic of Korea	Taiwan	India	Israel	Argentina	Chile	Costa Rica	Brazil	Tunisia	Australia	New-Zealand
USA																		
Canada																		
European Union																		
UK																		
Switzerland																		
China																		
Japan																		
Republic of Korea																		
Taiwan																		
India																		
Israel																		
Argentina																		
Chile																		
Costa Rica																		
Brazil																		
Tunisia																		
Australia																		
New-Zealand																		

Bilateral Agreement

Restricted Bilateral Agreement

Unilateral Agreement [1]

No Equivalence Agreement

Source: Agence BIO/Many different sources

■ The bilateral agreement between the United States and the European Union which entered into force on June 1st, 2012 is restricted: to export animal products to the United States or to import apples and pears into the European Union, a certificate of absence of use of antibiotics is required from both sides.

1- From other countries towards European Union, Japan and Switzerland.

- The US agreement with the Republic of Korea only covers processed products.

- In 2020, Japan extended its agreements with the United States, Canada and Australia to include livestock products[1]. The agreement between Japan and the European Union only concerns plant products (excluding wines).

- India only imports organic products certified under US regulations.

- The agreement between the United States and Taiwan, which was previously unilateral[2], became bilateral in 2020[3].

- The agreement between Canada and the European Union has been extended to include especially winemaking.

- Taiwan's agreement with Japan only concerns vegetable, unprocessed and processed products (excluding alcohol, seeds and plants).

- Other equivalence agreements are under negotiation, e.g., between the European Union and Latin American countries and between Taiwan and India, Chile and Paraguay.

- On December 24, 2020, a trade agreement was concluded between the UK and the EU. The EU has agreed to recognize the UK as equivalent for organic products until December 31, 2023. This is in addition to the recognition of equivalence already agreed for the 6 UK control bodies in early December 2020 and the British recognition of European Union as equivalent.

- In countries that do not have an equivalence agreement with the United States nor the European Union, producers often must be certified according to several specifications to be able to export their organic production.

- The European Commission has officially included San Marino among the equivalent states for organic certification. Organic products from San Marino can therefore be exported freely to the EU and use the European organic logo.

1- The US-Japan Organic Agreement on Plants was concluded in 2013.

2- It allowed the United States to sell their organic products in Taiwan.

3- The United States is currently the largest source of imports of organic products for Taiwan, accounting for 30% of the total, followed by Canada.

Participatory Guarantee Systems

■ Participatory Guarantee Systems (PGS) are locally oriented quality assurance structures. They are built on trust, networks and knowledge exchange. They are particularly suitable for small farms. They also help develop local markets for organic products.

■ In 2019, this type of certification was recorded by IFOAM in 76 countries worldwide. This represented 567,142 farmers, including 496,104 certified organic[1] (compared to 6,000 in 2010).

■ Participatory guarantee systems are already recognized[2] by the State as organic certification systems in several countries: Bolivia, Brazil, Chile, Costa Rica, Ecuador, India, Madagascar, Mexico, New Caledonia, Paraguay, Peru, the Philippines, French Polynesia and Uruguay.

■ India is the country where participatory guarantee systems are used the most.

1- The other producers are still in conversion.
2- Otherwise, producers engaged in PGS are not counted in the statistics.

Organic Farming is developing around the World.

Nearly 71.5 million ha grown organically late 2018.

■ The global area grown organically (certified and in conversion) was estimated at nearly 71.5 million hectares late 2018[1]. It represented 1.5%[2] of the entire agricultural territory of the 186 countries surveyed by FIBL/IFOAM.

■ Nearly 2.8 million certified organic farms were registered in 2018. In some countries, statistics are not available, so this number is underestimated.

Organically grown areas and organic farms worldwide late 2018

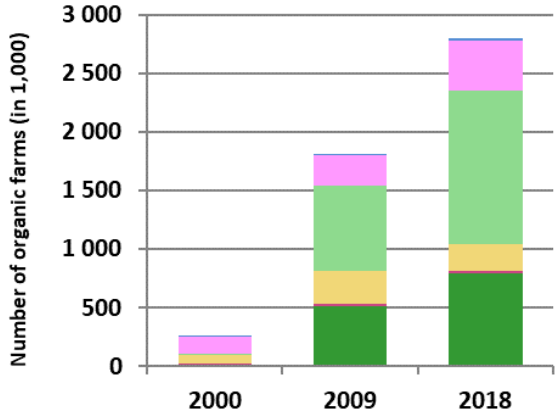
Source: Agence BIO/FIBL/IFOAM/Many European sources

■ Non-agricultural organic areas (mainly dedicated to picking and beekeeping) represented 35.7 million ha in 2018. They have multiplied by 8.7 in 19 years. 47% of these areas were in Finland, Zambia and Tanzania.

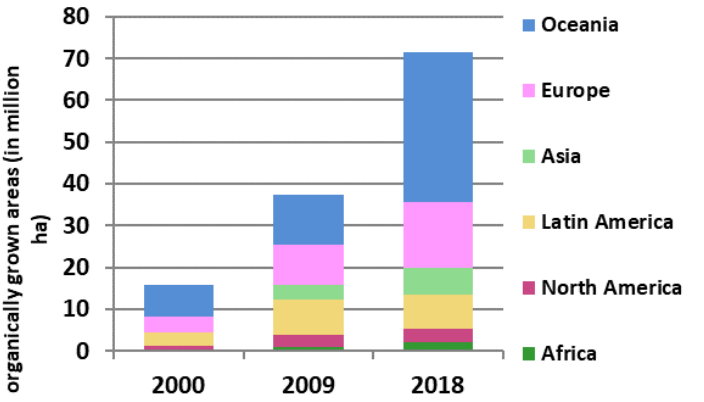
1- Estimate based on data from FIBL/IFOAM and other organizations.
2- It was 0.3% in 2000 and 1.4% in 2017.

Between 2000 and 2018, the number of organic farms worldwide increased by 11.2 times and the area grown organically by 4.6.

Evolution of organic farms number worldwide



Evolution of organically grown area worldwide



Source: Agence BIO/FIBL/IFOAM/Many European sources

■ In eighteen years, the agricultural areas grown organically and the number of organic farms have increased at more or less rapid rates depending on the continent. The strongest growth rates have been observed in Asia and Africa, where development really started from the 2000s. Between 2000 and 2018, Oceanian organic areas have almost multiplied by five. The share of each continent in global organic agriculture has changed significantly from 2000 to 2018.

■ The global organic area (certified and in conversion) increased by more than 2.0 million ha between 2017 and 2018 (+2.9%). Areas increased in most continents: in Oceania (+105,008 ha), in Asia (+529,634 ha), in Europe (+1.2 million ha), in Latin America (+49,217 ha) and in North America (+111,945 ha). In Africa, the areas have declined (-13,704 ha).

Uruguay is the country where organically grown areas increased the most in 2018 (+264,905 ha, i.e., + 14%). It is followed by Argentina (+244,141 ha, i.e., + 7%), France (+235,367 ha, i.e., +13%), Vietnam (+179,675 ha, i.e., a fourfold increase) and Spain (+164,302 ha, i.e., +8%).
Mexico is the country where areas grown organically fell the most in 2018 (-490,743 ha, i.e., - 73%), ahead of Kazakhstan (-64,607 ha, i.e., -25%) and Sudan (-53,109 ha, i.e., -41%).

■ The number of organic farms recorded worldwide fell by more than 154,500 in 2018 compared to 2017 (-5.2%). It increased in Asia (+7.0%), North America (+4.3%) and Europe (+ 3.8%). However, it fell in Oceania (-22.1%), Latin America (-50.6%) and Africa (-2.2%). In Latin America, the decline was mainly due to a decrease in Mexico.

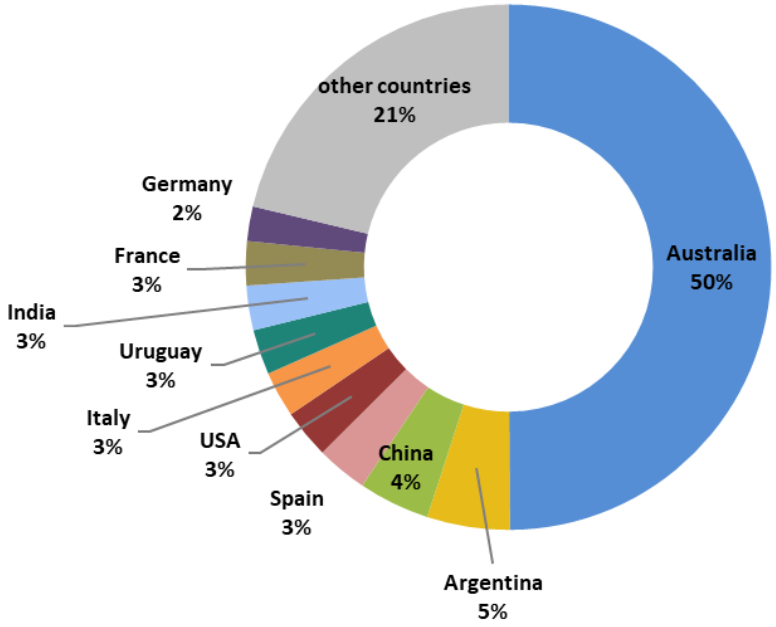
India is the country where the number of organic farms increased the most in 2018 (+56,083) and Mexico the one where it declined the most (-183,000)[1].
In 2018, 47% of global organic farms were in Asia and 28% in Africa.
India, Uganda[2] and Ethiopia are the countries with the most organic farms in 2018.

Almost $^{4}/_{5}$ of organically grown areas worldwide in 10 countries.

- In 2018, half of areas grown organically were in Oceania and 22% in Europe.

- Australia represented half of the world's grown organically areas in 2018, but 97% of its organic land was pasture.

Breakdown of global organically grown areas in 2018



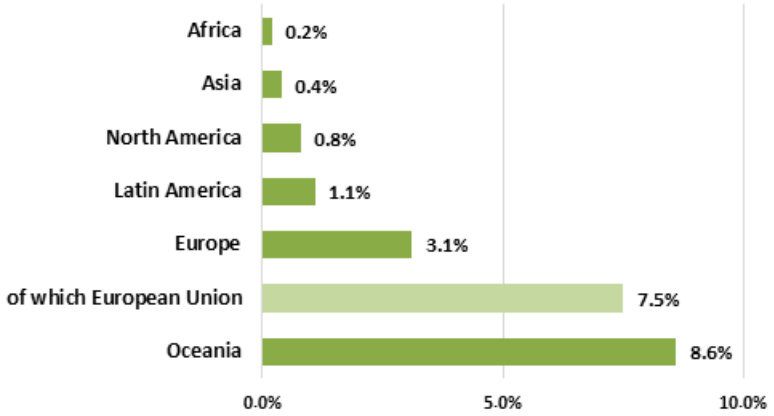
Source: Agence BIO/FIBL/IFOAM/Many European sources

1- The source of the FIBL/IFOAM data has changed for Mexico from 2018. The new data no longer includes small farms.

2- The agricultural sector in Uganda mobilizes over 85% of the total population and its contribution to Gross Domestic Product exceeds 24%.

From one continent to another and from one country to another, organic farming occupies a very different share of the agricultural area.

Share of organically grown areas in the Utilized Agricultural Area (UAA) by continent in 2018



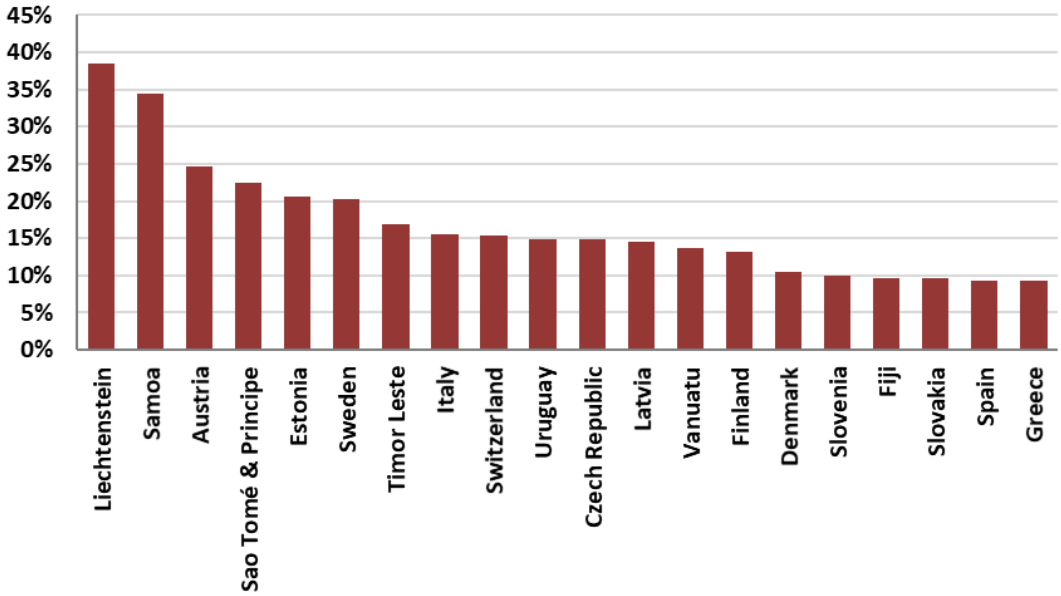
Source: FIBL/IFOAM

- Oceania and Europe remained in the lead in 2018 with shares of organically grown areas of 8.6% and 3.1% in 2018, while the share was only 0.2% in Africa.

- In 2018, the share of organically grown areas in the national UAA exceeded 2% in 51 countries, including 27 EU countries[1]. It exceeded 10% in 14 countries, including 7 in the European Union.

In 2018, France was in 7th position in terms of area and 25th in terms of the share of UAA grown organically.

Share of organically grown areas in the UAA by country in 2018



Source: Agence BIO/FIBL/IFOAM/Many European sources

1- The only EU country to have less than 2% of its UAA grown organically is Malta.

Main Benchmarks in 2018

		Africa	North America	Latin America	Asia	Europe	Oceania
Areas grown organically	Area grown organically ((million ha)	Nearly 2.0	Over 3.3	Over 8.0	Over 6.5	Over 15.6	Nearly 36.0
	Share of the UAA of the continent grown organically	0.2%	0.8%	1.1%	0.4%	3.1%	8.6%
	Share of global organic areas by continent	3%	5%	11%	9%	22%	50%
	Country with the biggest area grown organically	Tunisia	USA	Argentina	China	Spain	Australia
	Share of organic land on the continent in this country	14%	61%	45%	48%	14%	99%
	Country with the biggest organic share	Sao Tome & Principe (22,5%)	Canada (2.0%)	Uruguay (14.9%)	East Timor (16.8%)	Liechtenstein (38.5%)	Samoa (34.5%)
Organic farms	Organic farms number	788,549	23,957	227,407	1,315,913	418,128	20,859
	Share of global organic farms by continent	28%	1%	8%	47%	15%	1%
	Country with the biggest number of organic farms	Uganda	USA	Peru	India	Turkey	Papua New Guinea
	Share of organic farms on the continent in this country	27%	76%	46%	87%	19%	61%
Main organic crops		Coffee, olives, oilseeds, nuts, cocoa and cotton	Cereals, oilseeds, protein crops, dry pulses and vegetables	Coffee, cereals, cocoa and tropical and subtropical fruits	Cereals, oilseeds, cotton and coconuts	Cereals, olives, protein crops, dry pulses and oilseeds	Coconuts, cereals and coffee

Source: Agence BIO/FIBL/IFOAM/Many European sources

Processors, importers and exporters of organic products in 2018

- In 2018, around 96,000 organic processors were recorded by FIBL/IFOAM. However, the actual number of organic processors is underestimated as many countries did not provide figures.

- Almost 6,600 importers of organic products and over 8,800 exporters were recorded in 2018. Most importers were in Europe (5,790).

Consumption of Organic Products around the World

The Global Organic Market

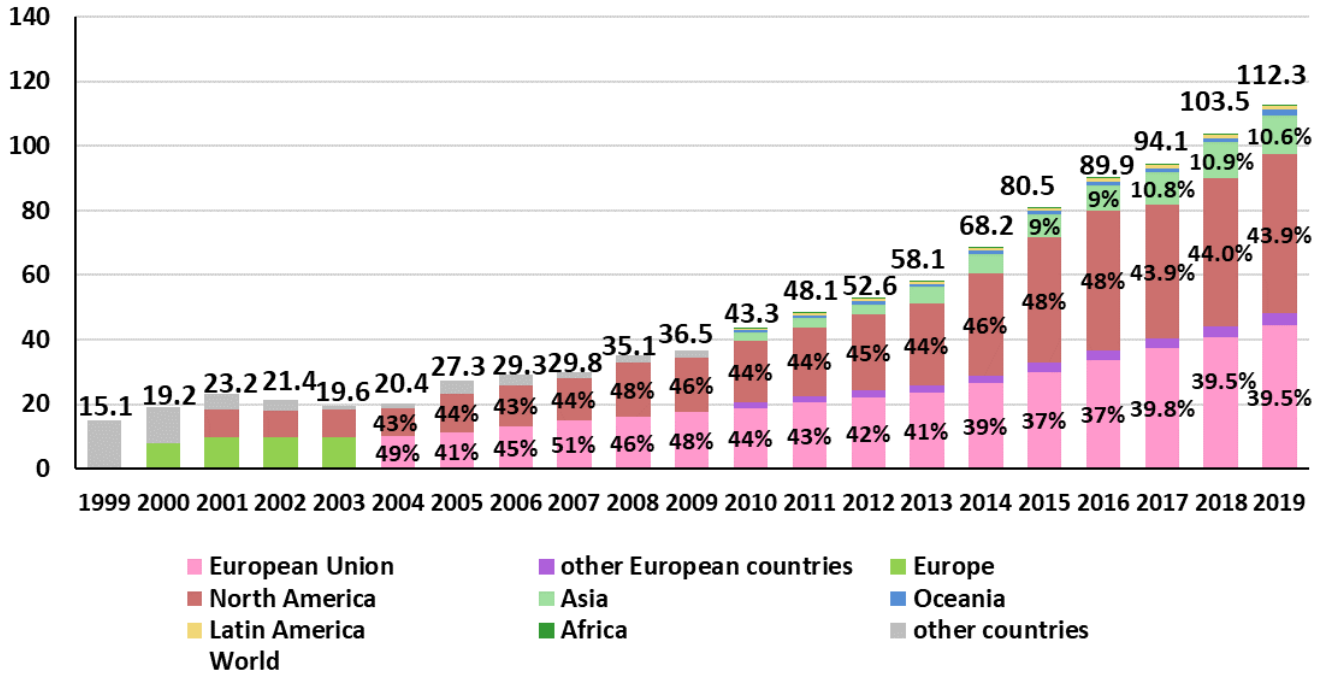
- The main reasons for purchasing organic products highlighted by the studies are health problems, environmental protection, food safety and quality.

- The global organic food market has more than multiplied by seven in twenty years, exceeding € 112.3 billion[1] in 2019 according to our first estimates[2].

- Almost 9/10th of the world consumption of organic products takes place in North America and Europe.

- North America remained the main consumption zone for organic products in 2019, just ahead of Europe.

Evolution of the global organic food market from 1999 to 2019 (in € billion)

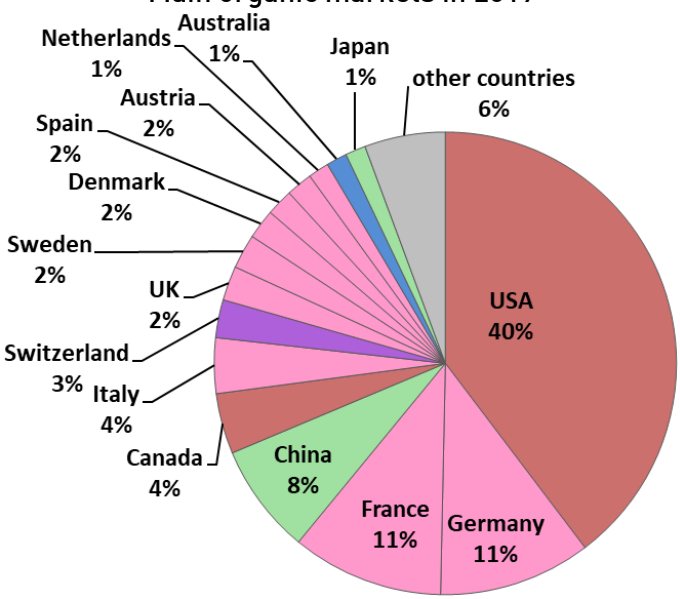


Source: Agence BIO

1- Nearly $ 126.2 billion (Exchange rate as of 12/31/2019).
2- The global organic market is underestimated because data is not available for all countries in the world.

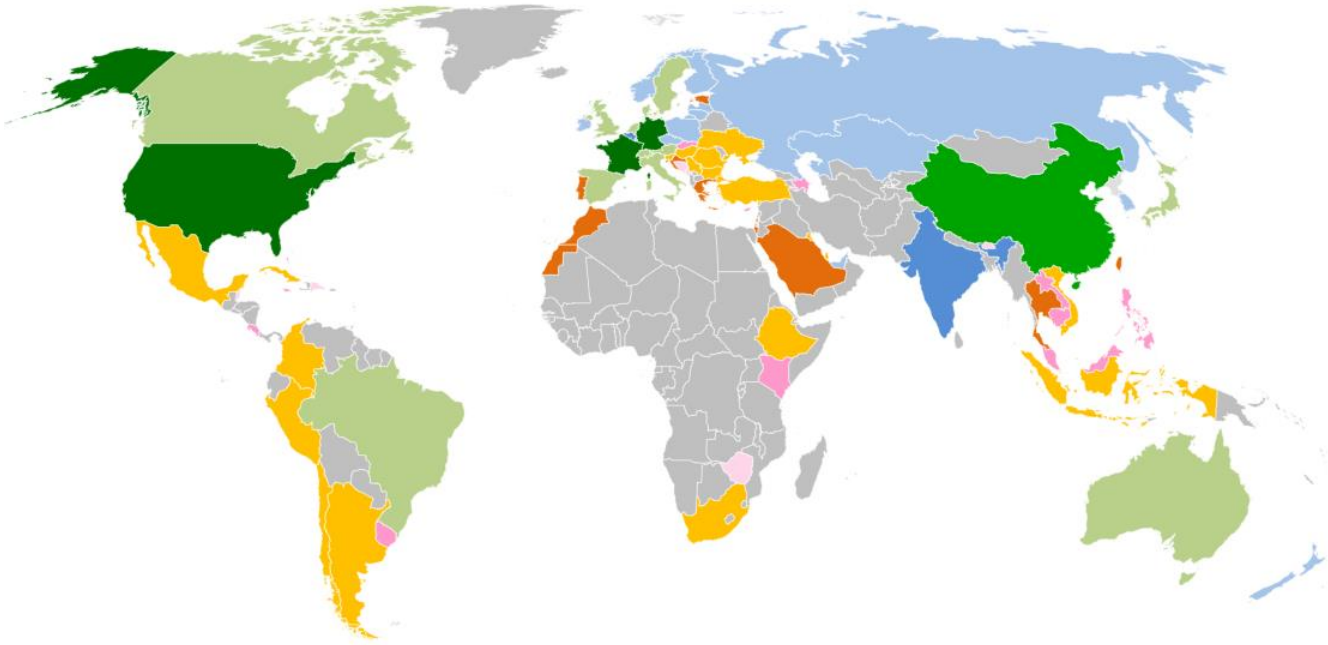
ORGANIC SECTOR IN THE WORLD

Main organic markets in 2019



Source: Agence BIO

Organic markets in the world in 2018-2019



Over € 10 billion	Between € 50 and 100 million
Between € 5 and 10 billion	Between € 10 and 50 million
Between € 1 and 5 billion	Between € 1 and 10 million
Between € 500 million and € 1 billion	Under € 1 million
Between € 100 and 500 million	No information

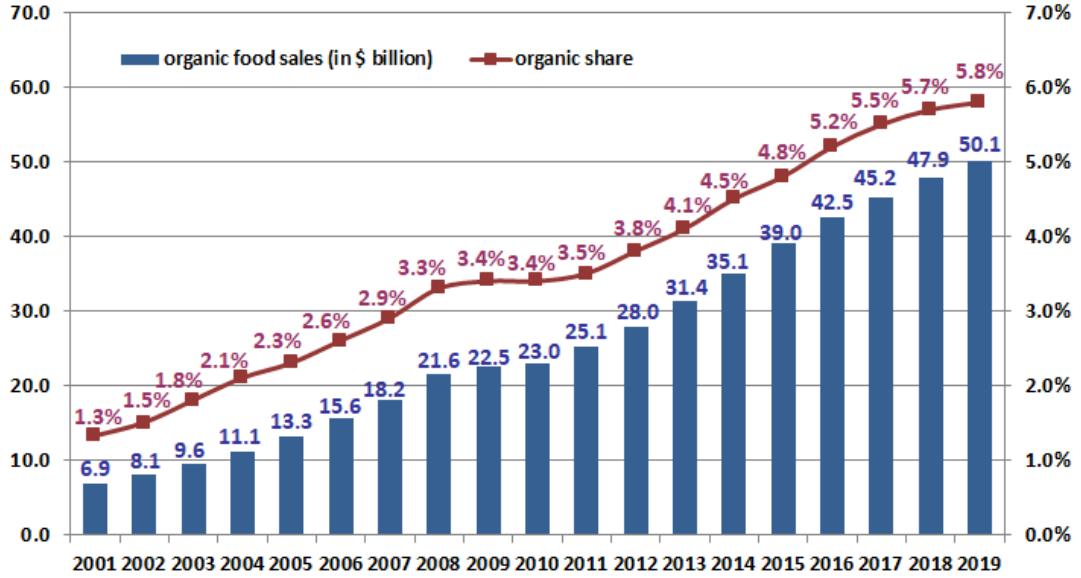
Source: Agence BIO

Organic Markets by Continent

North America: 43.9% of the global market in 2019

■ The United States ranked 1st with 40% of the global organic market in 2019. The value of total organic sales (food and non-food) represented $ 55.1 billion in 2019, including $ 50.1 billion for food products (€ 44.6 billion[1]), i.e., an increase of 4.6% compared to 2018 (after an increase of 5.9% in 2018)[2]. The US organic market has more than doubled in ten years. Organic products represented 5.8% of the food market in 2019. The COVID-19 pandemic appears to have had a positive impact on the organic market during the first half of 2020. According to the *Organic Trade Association*, organic sales increased by more than 20% in spring 2020 compared to spring 2019. The demand for milk, eggs, packaged food and frozen products has increased significantly. US demand for organic products is growing faster than production. In 2017, the United States experienced a shortage of organic products. The situation started to improve in 2018, thanks to an increase in production and imports.

Evolution of the US organic food market between 2000 and 2019 (in $ billion)



Source: Organic Trade Association

According to a survey published by the *Organic Trade Association*, 84% of US households said they bought organic products at least occasionally in 2019 and 45% regularly.
According to a study on the behavior of American households carried out in September 2017, Generation Y buys more organic products than the previous ones. Their purchases increase from year to year, especially as they buy more organic products when they have children. This generation is considered to be the engine of growth in the organic market. According to *Ecovia Intelligence* and *Mintel*, it even represents more than half of the organic market in the United States. 40% of people of this generation consider buying organic products as an integral part of their lifestyle.

1- Exchange rate as of 12/31/2019
2- In 2019, the total US food market grew by 2.3% compared to 2018.

ORGANIC SECTOR IN THE WORLD

Health and nutritional value appear to be the main reasons to purchase organic products. The health crisis has strengthened health as the first criterion to purchase organic food. Protecting the environment is increasingly seen as an important motivation[1].
A survey conducted in 2017 showed that American consumers are willing to pay more for organic food: 44% of consumers agree to pay 20% more for organic fruits and vegetables. Fruits, vegetables and dairy products are the most popular organic products in the USA.
The organic market is more developed on the West Coast (particularly in California), as well as around New York City. California is also a state where organic production is developed.
Many conventional companies have launched organic products (e.g., organic baby food launched by *Campbell Soup*).
Supermarkets are the main sales channel for organic products. All main chains offer organic products under private labels. 75% of conventional products currently have an organic alternative in supermarkets, thanks to organic products under private label. Organic sales in other channels is also developing (on farmers markets, through deliveries and online[2]). *Amazon* plans to expand its network of organic *Whole Foods* supermarkets in the USA. In 2018, online sales only accounted for 2% of retail food sales, but this share is expected to increase sharply in the coming years. More and more organic products are introduced in restaurants and collective catering. Almost three-quarters of US daycares already use organic products. The price of organic products is considered less of a barrier to market growth than it was a few years ago, due to the drop in prices caused by the emergence of organic private label products.

■ The Canadian organic market was valued at € 4.75 billion in 2019[3]. Retail sales increased by 8.7% compared to 2018. According to estimates, the organic market should be around 4.8 billion € in 2020. Organic products represented more than 3% of supermarkets food sales in 2019.
In 2020, 66% of Canadians consuming organic products bought them every week. Generations Z and Y are the ones who buy the most organic products. In 2020, organic products represented 46% of Generation Z's weekly purchases and 32% of Generation Y's.
Supermarkets remained the main sales channel for organic products in Canada. In 2020, 82% of consumers of organic products regularly bought them in supermarkets. Organic products have their own shelf in all mass retail chains and this is often placed in the central aisle. The place dedicated to organic products is increasing in this channel (especially in the *Loblaws* and *Provigo* stores).
The US chain *Whole Foods Markets* is also present in Canada. There are also many chains that have developed in a single province. Many health food shops also sell organic products.
In 2020, 32% of consumers bought organic products directly from farmers. Direct sales through subscriptions are developing, particularly in Quebec.

1- According to the Toluna/Harris Interactive Consumer Response to COVID-19 Barometer, 26% of Americans polled said they would be more concerned about the environment after the crisis than before.
2- In 2019, the US ranked 2nd in the world for e-commerce.
3- Catering included

The market for organic food in catering was valued at more than € 380 million in 2019, i.e., an organic share of 1.8% in this channel.
Online sales represented 8% of organic food purchases in 2020 (compared to 4% in 2016)[1].
Fresh fruits and vegetables remained the favorite organic products of Canadian consumers.
The main reason to purchase organic products was health, ahead of animal welfare.

Europe: 92% of European organic consumption in the EU

■ In 2019, of the top ten global organic markets, seven were in Europe. The European market for organic products amounted to € 48.0 billion in 2019, i.e., 42.8% of the global organic market, including € 44.3 billion in the European Union (39.5% of the global organic market).
Organic distribution is much more developed in Europe than in the rest of the world. However, in recent years, supermarkets have been responsible for most of the growth of the European organic market. Most of the European supermarkets now offer organic products under private labels.
The use of organic products in catering has developed in many European countries.

Organic markets in the European Union[2] :

■ Germany ranked 2nd globally with 11% of the organic market in 2019. The German organic market grew by 9.7% in 2019, reaching € 11.97 billion[3] [4] and the organic market share approached 5.7%.
More than 96% of German households bought an organic product at least once in 2019.
In 2019, supermarkets[5] remained the main sales channel for organic products (59.6%) and its organic sales increased by 11.4%. In 2018, there were nearly 2,600 organic shops. In 2019, organic distribution represented 26.6% of the German organic market and its sales increased by 8.4% compared to 2018. During the first half of 2020, sales of this channel even increased by 18.8% in value compared to the first half of 2019 (at constant store scope).
Organic sales online are growing, but many projects are not turning out to be profitable.
Animal welfare remains the main reason to buy organic products.
The most purchased organic products are eggs, dairy products, vegetables and fruits.

■ In Austria, the organic market grew by 6.7% in 2019, reaching € 2.06 billion.
According to *AMA*, all Austrians buy organic products at least once a year.
Supermarkets are the main sales channel for organic products (78% of the organic market in 2019). The organic share in this channel was 9.3% in 2019. Direct sales and organic shops represented 15% of the organic market in 2019.
Health is the main reason to buy organic food.
Milk and eggs are the most popular organic products.

1- There has been strong growth in online shopping by Canadians during the lockdown.
2- For more information on the EU, see the dedicated publication.
3- Excluding catering
4- Since the publication of our document, AMI has revised this figure upwards (€ 12.26 million).
5- Including hard discount and drugstores

ORGANIC SECTOR IN THE WORLD

■ In Belgium, the organic market was estimated at € 779 million[1] in 2019 (+4% vs 2018) and the organic market share reached 3.4%.
In 2019, 96% of Belgians bought an organic product at least once. Organic consumption is significantly higher in Wallonia than in Flanders. In 2019, Wallonia and Brussels represented 61% of the organic market and Flanders 39%. In Wallonia there are more organic farmers, areas grown organically and organic shops than in Flanders. Brussels is home to more singles, wealthy families and two-income households with a growing interest in organic food.
Large retailers remained the main sales channel for organic products in 2019 (62%[2]). It offers a lot of organic products under private label. Organic shops came in second with a quarter of the organic market. Unlike the situation in many neighboring countries, their share is growing every year, to the detriment of direct sales and those of craftsmen. Late 2018, Belgium had around 600 organic shops. Online sales and drives seem to develop more slowly than in France.
Vegetables, dairy products and fruits are the most popular organic products in Belgium.
Health is the main reason to buy organic products, ahead of product quality and protection of the planet. Price remains the main brake on the organic market development.

■ In Bulgaria, the organic market amounted to € 30 million in 2018 (+7% vs 2017). The organic range is increasingly diversified. Supermarkets are the main sales channel for organic products. All the chains have developed their organic ranges in recent years. There are around 200 organic shops. Organic sales online have grown. Rapid delivery services for organic products have developed very fast.
Health and environmental protection are the main reasons to purchase organic products.
Infant products, drinks, snack products and dairy products are the main categories of organic products sold.

■ The Croatian organic market was valued at € 99 million in 2018. Organic products were sold in supermarkets, in organic shops, at the farm, in farmers markets and online. The organic supply in mass distribution has been expanding for several years.
Generation Y people are more interested in organic products than their elders.
Health and food safety appear to be the main reasons to buy organic food, while the price and lack of consumer knowledge about organic products are the main brakes.
Fruits and vegetables are the main organic products purchased.

■ The Cypriot organic market is still very modest (€ 2 million in 2016) and its development is still slow. Between 2 and 5% of consumers regularly buy organic products. The main brake is the high price of organic products.

1- Non-food included
2- Including 9% for hard discount

ORGANIC SECTOR IN THE WORLD

■ In 2017, the Czech organic market reached € 133 million (+30.4% vs 2016) and the organic market share 1.2%. Supermarkets remained the main channel for organic products (40.5%), ahead of drugstores, online commerce, organic shops and health food shops. The supermarkets have increased their organic range in recent years. Direct selling is growing, especially online and in the markets.
The main brake on the development of organic consumption is the price.
The most popular organic products are processed products.

■ The Danish organic market exceeded € 2.3 billion in 2019 (+9.9% vs 2018). In 2018, organic products represented 12.1% of organic product purchases in supermarkets and online. Over 80% of Danes consume organic products. 52.5% of Danes bought it every week in 2019.

Supermarkets are the main sales channel for organic products. Organic sales in supermarkets and online grew by 9.4% overall in 2019. Organic shops hardly exist in Denmark. Sales in markets and at the farm only represent a small part of the total organic sales. The use of organic products in catering is booming (+ 10.6% in 2019).
Preserving health is the number one reason to purchase organic products, ahead of environmental protection and animal welfare.
Fruits and vegetables and dairy products were the two main categories of organic products sold in 2019.

■ In Estonia, the organic market approached € 55 million in 2018 (+31% vs 2017) and the organic market share reached 3.4%. The increase in supply is hampered by the low level of development in the processing of organic products. Organic consumption is much higher in urban areas than in rural ones. However, there is a wide range of organic products in various distribution channels, especially in mass distribution.
Health and food safety are the main reasons to buy organic products. The price is a brake on organic consumption development.

■ In 2019, the Finnish organic market grew by 9.6%, reaching € 368 million and the organic market share rose to 2.6%. According to *Pro Luomu*, just over a third of Finns now buy organic products at least once a week and less than a third at least once a month. Today, only 5% of Finns do not buy organic products at all.
Supermarkets are the main sales channel for organic products. Organic shops and purchases directly from farmers represent a small share of the organic market. Organic sales online did not take off.
Families with children remain the main demographic group buying organic products. Young people are more interested in these products than previous generations.

The main reasons to buy organic products are the "purity" of organic products, flavor, respect for the environment, animal health and welfare, while price and lack of availability are the main brakes on market development.
The most popular organic products are fruits, dairy products, vegetables, coffee, tea and eggs.

ORGANIC SECTOR IN THE WORLD

■ France was the third largest organic market worldwide in 2019. It reached € 11.93 billion in 2019 (+13.5% vs 2018) with an organic market share (excluding catering) of 6.1%. According to the *Agence BIO/Spirit Insight Barometer*, 89% of French people said they had consumed organic products in 2019, including 71% at least once a month and 47% at least once a week.
Large-scale distribution remained the first channel in 2019 (52%), ahead of organic shops (27%), direct sales (10%), catering (5%) and craftsmen-shopkeepers (6%). In recent years, the supermarket chains have launched organic shops chains. During the first three quarters of 2020, sales of fixed-weight organic products in supermarkets increased by 13.7% overall compared to the same period of 2019, while sales in organic shops increased by 6.1 %. Organic distribution has been developed for a long time. France is even a pioneer because it was the first country to have an organic chain and organic supermarkets. Online sales are growing.
The main reasons to consume organic products are the preservation of health, the quality and taste of the products, the preservation of the environment and animal welfare. Price remains the main brake on organic market growth.
Fruits and vegetables are the main organic products consumed in France.

■ The Greek organic market was estimated at € 66 million in 2017 (stagnation vs 2016). Since the economic crisis, it has not started to increase again. Supermarkets represented 68% of the organic market in 2016, ahead of organic distribution (27%). There are very few organic products online and in catering.
The main reasons to buy organic products are the non-use of chemical additives, natural treatments and health. The main brake is the lack of confidence in organic products.

■ The Hungarian organic market was valued at € 30 million in 2015. Supermarkets are the leading channel for organic products. Almost all chains offer them, most often under private labels. Online sales of organic products are growing. Organic products are also sold in organic shops and on markets.
The main brakes on consumption are price and lack of confidence.

■ In Ireland, the organic market reached € 206.4 million in 2017 (+38% vs 2016). 68% of Irish people bought organic products at least once a month in 2017.
In 2017, supermarkets represented 80% of the organic market, with direct sales, delicatessens and online sales accounting for most of the remaining 20%. Large online retailers offer a wide range of organic products. There are very few organic shops. Many delicatessens sell large quantities of organic products and a few health food shops have some in their offer.
The main reasons to buy organic food are the benefits to health, the environment (including climate change), animal welfare and the fact that there are no synthetic chemicals used to produce them. The most popular organic products are carrots, bananas, milk, yogurt, eggs, beef and porridge.

ORGANIC SECTOR IN THE WORLD

■ During the year ending August 2020[1], the Italian organic market grew by almost 7% and approached € 4.36 billion. 88% of Italian households have bought an organic product at least once during this period.
Large-scale distribution represented 47% of the organic market, organic distribution 21% and catering 11%. Organic sales in supermarkets increased by 5% compared to the previous year. The space dedicated to organic products in mass distribution has been growing for several years. Currently, all chains offer organic products. Sales of organic shops have started to grow again (+8%). There were 1,354 organic shops in 2018. This channel is very fragmented: 21% of shops are completely independent. Organic sales online still only accounted for 1% of the organic market but grew by 143% from the previous year. 375 websites offered organic products in 2018. 2,857 organic farms sold at least some products directly in 2018.
Organic consumption is more developed in the north of the country.

Food safety is the main reason to buy organic products.
The most popular organic products are fruits, vegetables, cereal products, olive oil, eggs and honey.

■ The Latvian organic market was valued at € 105 million for 2019. Two supermarket chains have started to expand their organic ranges, particularly under private label. There are several independent organic shops. Health is the main driving force behind the purchase of organic products and price the main brake.

■ In Lithuania, the organic market was estimated at € 115 million in 2019. Organic consumers are mainly city dwellers. Several supermarket chains have introduced organic products in their offer.
The main brake is the lack of understanding of the word organic.

■ The Luxembourg organic market was estimated at € 135 million in 2018. Organic distribution is relatively well developed. There are also organic products in supermarkets, direct sales and restaurants.
The organic products most bought by Luxembourgers are infant food, honey, eggs and flour and cereals.

■ In Malta, there is a local demand for organic products, but the amount of the organic market is not known. Organic products are sold in different distribution channels.

■ In 2018, organic market grew by 8.4% in the Netherlands, approaching € 1.64 billion. The organic market share in supermarkets and organic shops reached 4.7% in 2018. According to *Bionext*, 95% of Dutch households bought organic products in 2019.
In 2018, supermarkets (excluding hard discount) represented half of the organic market, ahead of catering with 21% and organic distribution with 20%. In recent years, organic distribution has been more subject to competition from large-scale distribution and the

1- We consider this to be 2019 in the overall calculations.

resulting pressure on prices. The supermarket chains offer between 50 and 1,000 organic references. Their organic range under private label is growing. Several online organic shops have been created over the past decade. Direct sales represented 3% of the Dutch organic market in 2018.
In 2019, organic sales in supermarkets increased by 4.9% compared to 2018. For the first time in five years, sales of organic shops increased again (+1.8% vs 2018).
The main reason to buy organic products is to protect the environment and the price is the main brake on the development of organic consumption.
Fresh fruits and vegetables[1] are the main category of organic products purchased.

■ The Polish organic market amounted to € 250 million in 2017 (+33% vs 2016), but organic products still only represented 0.5% of the food market. In 2018, around 30% of Poles bought organic products, but only 4% did so on a regular basis.
The supermarkets represented the first sales channel for organic products. There are organic shops, mostly located in large urban areas. The sale of organic products online is growing.
Health and food safety are the main reasons to buy organic products.

■ In Portugal there is no overall estimate of the organic market, but sales of packaged organic products and drinks were valued at € 60.5 million in 2017. 47.7% of Portuguese regularly buy organic products.
In recent years, there has been a sharp increase in local demand for organic products. This has led to the development of organic distribution, organic markets and of organic range in supermarkets. Large-scale distribution is the primary sales channel for organic products. In 2019, the organic range in supermarkets continued to develop. Organic products are also sold online and through basket subscriptions.

■ The Romanian organic market was valued at € 41 million in 2016. In 2018, organic products represented less than 1% of food sales in supermarkets, while this channel constituted more than two-thirds of the Romanian organic market. A small share of the products sold in the markets are organic. Organic shops are rare. The sale of organic products online is growing.
Price sensitivity remains a major drag.
Dairy products are the main organic products sold, ahead of infant food.

■ The Slovak organic market was estimated at € 4 million in 2010, i.e., only 0.2% of the food market. Most major retailers sell a small range of the most common organic products, often under private labels.

■ In Slovenia, there is no recent assessment of the organic market. The latest figure dates from 2013: € 49 million.

1- Potatoes included

ORGANIC SECTOR IN THE WORLD

■ The Spanish organic market was valued at € 2.1 billion in 2018 (+7% vs 2017). According to *Ecovalia Intelligence*, it probably reached € 2.3 billion in 2019.
According to *Kantar World Panel*, 72% of Spanish households consumed organic products in 2020 (compared to 65% in 2019).
The growth of the Spanish organic market is strongly linked to the development of supermarkets range, in particular under private labels. *Carrefour Bio* shops have been opened. Organic distribution faces more competition from supermarkets than before. The introduction of organic products in catering is developing.
Demand for organic products is particularly high in Galicia, Castile and Leon, Andalusia, Catalonia and Madrid. Generations Y and Z are the main categories of consumers of organic food.
Health is the first reason to buy organic products.
Vegetables, meat, fruits and cereals are the most popular organic products.
The Spanish organic market should continue to grow strongly over the next few years, in particular thanks to the development of organic consumption by young people.

■ The Swedish organic market was estimated at € 2.7 billion in 2018 and 2019. After strong growth in 2014 and 2015, it experienced a slowdown, then a virtual stagnation in 2019 (+1% vs 2018). The organic market share was 9.0% in 2019.
In 2019, supermarkets represented a little more than half of the Swedish organic market, ahead of the monopoly (19%), catering (20%) and online sales (5%). In supermarkets, organic sales fell in 2019, but they continued to grow in the Swedish monopoly (+6%). Sales of organic products in catering and online continued to grow in 2019. Organic sales online could increase significantly in the coming years.
During the first half of 2020, organic sales increased in supermarkets and direct sales, due to the COVID-19 crisis[1].
The main reasons for consuming organic are health, environmental protection and animal welfare.

■ In the United Kingdom, the organic market grew by 3.7% in 2019, exceeding € 2.7 billion. The organic market share remained fairly modest (1.6%).
In 2019, organic sales increased in all channels, with particularly strong growth for home delivery[2] (+11.2%). Supermarkets remained the main distribution channel for organic products (65%). The organic range available online is expanding. Many young people prefer to buy their organic products online[3]. Small home delivery businesses continue to see their sales increase. Organic distribution has been developing for several years. Catering represented 4% of the British organic market in 2019.
According to *Nielsen*, in the 52-week period ending October 3, 2020, organic sales in supermarkets were up 9.5% from the previous year.
Demand for organic products is higher in London and the South of England than in the rest of the UK.

1- The figures for the year 2020 were not yet available when our document was published in December 2020.
2- This channel includes both online purchases and subscriptions to "box schemes" (equivalent to the organic basket).
3- In 2019, the UK ranked 3rd in the world for e-commerce.

Health has become the main reason to buy organic products, while price remains the main brake. Young Britons, especially Generation Y, are increasingly buying organic products because they wish to know the origin of their food and are willing to pay more for products that respect the environment and animal welfare.
In 2019, dairy products remained the main category of organic products purchased.

Organic markets in other European countries:

- The Albanian organic market is relatively underdeveloped, with production oriented towards export. Organic products are available in supermarkets and in some organic shops, but all the products sold there are imported. A few organic farmers sell their products directly to consumers.

- In Belarus, the organic market is still modest. A covered market dedicated to organic products was expected to open near Minsk late 2020. Its sales area will be over 4,000 m².

- In the Federation of Bosnia and Herzegovina[1], although the national law on organic farming and the national register of organic producers are not yet in place, organic production is growing. Some organic food, produced locally and imported, can be found in supermarkets and markets across the country.

- In Georgia, supermarkets continue to try to set up organic shelves. They mainly offer imported organic products. The supply of local organic products is too scarce and seasonal to develop an attractive assortment for retailers. There are a few organic shops in Tbilisi. The sale of non-certified organic products online is growing. Organic food in restaurants can only be found at trendy establishments in eastern Georgia. Tbilisi has at least 3 totally organic restaurants.
The main brakes on organic market development are the lack of consumers awareness, low availability of products, difficulties for farmers to obtain inputs and the price of organic products.

- In Iceland, organic demand remains limited, but is growing. Most of the organic food consumed is imported, because national production is relatively modest (vegetables, milk, eggs and meat). Most supermarkets have an organic section. Icelandic consumers are still poorly informed about organic products benefits. The price also remains a brake on organic market growth.

- In Kosovo, organic market development is slow. Only a few imported products are available. Recently, organic products have gained popularity among Kosovars due to their healthy image. However, only 5% of Kosovar organic production is consumed locally, the rest being exported.
The main brakes on market development are the price and poor knowledge of organic products.
The most purchased organic products are baby food and tea.

1- Bosnia and Herzegovina consists of two administrative entities: The Federation of Bosnia and Herzegovina and the Republic of Srpska.

■ Organic products are increasingly popular in Moldova. Products certified according to EU regulations are sold in supermarkets, while those certified according to Moldovan standard are sold in the organic and artisanal products market in Chisinau. Until 2019, there was a limited number of organic products in supermarkets, but it has increased significantly. The main brake on market development remains the price due to the low purchasing power.

■ In Montenegro, organic products are sold in organic shops, health food shops, drugstores, at the farms, on markets and online. Supermarkets do not sell organic food.

■ In Norway, the organic market is less developed than in other Scandinavian countries, however, organic products are increasingly popular.
In 2018, the organic market was valued at € 415.6 million. Growth affected all counties. The organic market is estimated to have exceeded € 427 million in 2019.
Supermarkets are the main sales channel for organic products (53%), ahead of the monopoly (19%), catering (nearly 7%) and bakers (nearly 5%). The hard discount represents around 60% of organic sales in supermarkets. The chains *Coop* and *Rema 1000* have seen an increase in their organic sales during the health crisis.
Thanks to an expansion of its organic range, the monopoly's organic sales increased by 3.7% in 2019. Organic sales in catering grew by 8.6% in 2019. In 2018, only 1% of catering supply by value was organic. There are organic shops, but they are small and their organization is not very structured. Most are independent[1]. In recent years, a few new organic shops focused on local and reducing packaging. Health food shops also sell organic products. Late 2019, there were 43 organic cooperative farms and 80 *REKO*[2] (+16% vs 2018). Online shopping was relatively underdeveloped until recently due to a very high density of stores and Norwegians' habit of shopping nearby several times a week. The two main online organic shops are *Økoland* and *Dyrket*.
In 2019, 30% of Norwegian consumers said they ate organic food once a week or more and 4% said they ate it daily.
Protecting the environment is the main reason to consume organic food. The main brakes on the development of the organic market are the price and the lack of availability of local organic products. Indeed, organic areas have been declining since 2013 (support for conversion does not seem sufficient), while consumption is growing. The number of organic processors is also falling. Local conventional products are often preferred over imported organic products. Consumers also seem insufficiently informed about organic products.
Vegetables are the first category of organic products sold in Norway, ahead of dairy products.

■ In the Republic of North Macedonia, the organic market is still very dependent on imports. Organic products are sold in supermarkets, organic shops, drugstores, at the farm, on markets and online. Most supermarkets are owned by foreign chains and prefer to sell imported organic products than those produced in Macedonia because it is easier for them in terms of sourcing. In addition, supermarkets take

1- With its 4 points of sale, Røtter is an exception.
2- Not all REKO are organic.

fairly high margins on organic products because they consider that their sales are not going to grow quickly.
During the period of fruit and vegetable production, fresh produce accounts for the bulk of organic product sales, while processed foods are the main organic products consumed in winter.
The price of organic products remains a major brake on market development. There is a problem of lack of availability and poor logistical organization for supplies.

■ The Russian organic market is still modest: € 183 million in 2018, but it is growing rapidly. It has almost tripled since 2010. The organic market share was estimated at 0.7% in 2018. Between 1 and 3% of Russian households regularly buy organic products. The Russian organic market is expected to develop with the growth in production because imported organic products are very expensive due to the trade embargo which began in 2014. The organic law of January 2020 should allow production to be developed. The organic market could reach € 235 million in 2020 and € 260 million by 2025.
Representing around half of the Russian organic market, supermarkets are the main sales channel. They are followed by organic distribution (between 20 and 25%), farmers markets (a little over 15%) and online distribution (a little over 10%). There are organic departments in *Auchan*, *Perekrestok*[1], *Giper Globus* and *Tabris stores*. In other supermarkets, organic products are placed near conventional products. The high-end supermarket chain *Azbuka Vkusa* has around 70 organic products in its range. According to the *Union of Organic Agriculture of Russia*, there has been a development in 2020 of the sale of regional organic products in the Republic of North Ossetia-Alania and in the Kemerovo region of Siberia in *Kalina Malina* stores.
Russia is currently experiencing a phase of economic growth and the incomes of its inhabitants are increasing, which is favorable to organic consumption development. However, there is a significant gap between large cities and the rest of the country[2]. Purchases of organic products are mainly concentrated in Moscow and St Petersburg (60 to 65% of sales in 2018). Organic sales are much higher in Moscow than in St. Petersburg. In these two cities, organic shops and restaurants offering organic products are developing. Moscow has about twenty shops[3] with between 40 and 90% of their offer in organic and Saint Petersburg 4 shops offering organic products. There are both independent shops such as *Season Market* and chains such as *Ugleche Polje*. Several organic shops also have an online shop. The prices of organic products in organic shops remain quite high.
In Russia, women with children represent 40% of organic buyers. Health is the main reason to buy organic products in Russia. A third of consumers aspire to a healthier lifestyle[4]. 10% of organic consumers buy it on the recommendation of their doctor and around 10% because they are premium products. The remaining 5% buy organic products because it is a fashion trend.
The main brakes on organic market development are the lack of confidence, the price and the lack of availability.

1- For Perekrestok, only in its 23 supermarkets in Moscow so far.
2- The average income of Muscovites is double that of other cities and more than four times that of rural areas.
3- Recently, a first organic shop in the Moscow region, Rye and Flax, was certified according to EU regulations.
4- Russian consumers are placing more and more importance on healthy and sustainable products and less and less on brands.

Russian consumers are mainly interested in fresh organic products (dairy products, meat, fruits and vegetables).

■ In Serbia, organic consumers are mainly urban because the purchasing power is higher in the city. The first organic market was created in 2011. Since 2015, more organic markets have been created in the capital. Most supermarkets selling organic products are in the capital and in Novi Sad. There are a few organic shops there. Organic products are also sold online.
Health and food safety are the main reasons to buy organic products. The main brakes on market development are price, low consumer awareness of organic products and the difficulty of identifying these products. In addition, the Serbian organic sector is still poorly structured and some categories of organic products are not yet produced locally.

■ Switzerland is the main European organic market outside the European Union. It amounted to over € 2.98 billion in 2019 (+5.6% vs 2018) with an organic market share of 10.3%. Switzerland ranks 1st in the world for organic consumption per capita (347 € in 2019).
In 2019, the growth of the organic market affected all regions. French-speaking Switzerland is the one in which sales increased the most: +4.7%, thus becoming the region with the highest share of organic in the food market: 10.5%. According to *Bio Suisse*, this can be explained by the strong commitment of French-speaking organizations, but also by a change in consumer behavior and by support projects from some cantons, such as Vaud or Valais.
In 2018, 80% of Swiss households bought organic products several times a month and 56% several times a week. As in many other countries, consumers wish to be able to buy products that are both sustainable and local.
Supermarkets remained the main sales channel for organic products in 2019 (83% of the organic market). Organic sales rose 5.5% in 2019. Two supermarkets chains represented 76% of the organic market in 2019: *Coop* and *Migros*. Consumers are asking for an increasingly wide range of organic products. Online sales are gaining in importance. Sales from organic distribution increased by 5.6% in 2019 and represented 9% of the organic market. Organic shops are mainly located in German-speaking Switzerland. It is the networked shops that are developing because independent points of sale suffer more from supermarkets competition. In 2019, direct sales represented 5% of the organic market and increased by 5.6%. For several years, a few cities, such as Lausanne, Biel and Zurich, have been trying to develop the use of organic products in public canteens. Lausanne wishes to achieve a 70% share of organic products in public catering. Even if the consumption of organic products is very developed in Switzerland, there are still very few restaurants that offer them.
Dairy products were the most purchased organic products in 2019, just ahead of vegetables.

■ In Turkey, there is no reliable assessment of the organic market. The number of points of sale offering organic products is increasing. Supermarkets are the main distribution channel for organic products and the one with the largest organic range. Their organic range is growing, especially for processed products. Supermarkets offering organic products are in major cities and in tourist coastal towns. The weekly open bazaars in Istanbul, Bursa and Izmir also constitute an important distribution channel for organic products (fresh fruits and

vegetables and cereals). There are also 30 organic bazaars[1] where products are sold directly by the farmers. There are few organic shops with a wide range of products[2]. A chain of organic supermarkets has emerged: *Makro*. Organic sales online are growing.
The main brakes on organic market development are the lack of consumer confidence and the price. Organic packaged food is expensive in Turkey and is mostly purchased by educated, high-income urban consumers.
In big cities, the demand for organic products is growing. Subscription systems to organic baskets are developing there because consumers wish to have direct contact with farmers.
Rice is one of the main organic products sold in Turkey.

■ Organic products started to be sold in Ukrainian stores in the late 2000s. The organic market was estimated at € 36 million in 2019. Even though organic products are growing in popularity, only 5% of consumers know what organic products are. Residents of large cities are more interested in these products than those in rural areas. Their main reason to buy organic products is health. People are more and more inclined to pay more to buy it.
The main distribution channel for organic products is supermarkets. There are also organic shops[3] in the big cities and online sales are developing. The offer of organic products is still far from being complete, however, it is progressing significantly, particularly in supermarkets. Organic products are now available in most large retailers chains. Some supermarkets have set up health sections where you can find organic products. It is possible to find organic products in some restaurants, but it is not very common. However, there is a growing supply of organic alcoholic beverages, mainly wine, in restaurants.
The price remains a barrier to organic sales growth. However, the price difference between conventional and organic is quite small for Ukrainian organic products and the purchasing power of Ukrainians is increasing. The lack of awareness of organic products is a more important brake.

Asia: a growing organic market

■ The Asian organic market has experienced strong growth in recent years. It was estimated at over € 11.9 billion for 2019. Asian consumers are seeing their incomes increase, which gives them easier access to quality products. They are increasingly aware of ecological and food safety issues. However, the lack of organic legislation in several countries is still a brake on consumption development.
The main Asian markets for organic products are China, Japan, India and the Republic of Korea.

1- Organic bazaars are supported and run by NGOs or municipalities but controlled by the regional services of the Ministry of Agriculture.
2- e.g.: City Farm, Yom, Taze Masa and Tire Milk Cooperative
3- e.g.: Eko-lavka.

ORGANIC SECTOR IN THE WORLD

■ In Azerbaijan, the organic market is not very developed, mainly due to the lack of a national standard. It was valued at € 3 million in 2015. It is only possible to find a few processed organic products in supermarkets (processed fruits and drinks). The local organic association, *GABA*, tried to set up an online sales platform, but it was unsuccessful.

■ The Bangladeshi organic market is still very recent. Supermarkets in the capital have started selling organic products. Lack of consumer confidence remains the main brake on market development.

■ In 2019, China was the fourth organic market worldwide and the first in Asia with € 8.67 billion (+7% vs 2018), but organic products still only represented a modest share of the food market (a little over 1%).
Supermarkets are the main distribution channel for organic products (¾ of the market), however organic distribution (independent or in a network) and direct sales are growing. Organic shops are now located in all major Chinese cities. The Beijing organic market, created in 2010, takes place three times a week and has around fifty sellers. The sale of organic products online is growing strongly, especially for fruits and vegetables. In recent years, online sales, which are highly developed in China, have greatly boosted organic sales[1].
The use of organic products in public catering is growing.
Since 2013, the processing of organic products has been developing to satisfy the domestic market.
Organic consumers are mostly city dwellers. Families with young children, wealthy families, those with health problems, restaurants and government officials each represent 10% of the Chinese organic market. Foreigners living in China then arrive with 7% of the organic market. 80% of Chinese said they wish to eat healthier after lockdown. The pandemic has led to a renewed interest in personal well-being.
Due to food security concerns and increased income, people are increasingly turning to organic products. These are considered healthy, qualitative, fashionable and modern. Consumers pay attention to food labels and are interested in information about health. They are also increasingly concerned about the quality of the water[2].
Other reasons to buy organic products are the preservation of the environment, animal welfare and taste. However, Chinese consumers are still relatively poorly informed about organic products (only a quarter of the population knows them well). Price is emerging as another drag, although more and more Chinese are willing to spend more on organic products when they have sufficient knowledge of the benefits of these foods.
Infant foods and dairy products are the main categories of organic products consumed in China.

1- In 2019, China was the country with the most developed online sales.
2- Water pollution is a major environmental problem and the central government recently introduced a ten-year plan to purify water resources nationwide.

■ In India, the organic market was estimated at € 615 million in 2018, i.e., less than 1% of the food market.
For several years, the Indian newspapers has been raising public awareness of the importance of consuming healthy food. Organic products are therefore gaining in popularity. Most of the offer is distributed in urban areas. The organic market is growing mainly thanks to the demand of city dwellers who are more and more numerous[1]. The latter are willing to pay higher costs for organic products, while people in rural India are less aware of the benefits of these products. Bangalore is the city where the organic consumption is the most developed. The number of organic shops is growing rapidly. Supermarkets, however, remain the main distribution channel for organic products. These products are now very present there. The sale of organic products online is growing quite rapidly. Some hotels and restaurants offer organic menus.
The purchasing power of Indians is growing. Indians are increasingly aware of the environmental and health benefits of organic products. Health is the main reason to buy organic products in India. Generation Y people are more interested in these products than the rest of the population.
The main brake on the development of the Indian organic market is price, followed by the mismatch between supply and demand and the lack of availability.
Fruits and vegetables are the organic products most bought by Indians. Most of the food categories include organic products.
Business France estimated that the Indian organic market could reach € 1.1 billion in 2020. According to the *USDA*, the Indian market for organic packaged products is expected to grow by more than 10% per year over the next few years and according to *Avalon Consulting*, the Indian organic market could even exceed € 1.8 billion by 2024. The COVID-19 crisis seems to have had a positive effect on organic demand in India.

■ In Indonesia, the organic market was estimated at € 10.7 million in 2017. Recently, it has grown further thanks to the sale of organic products online. However, this phenomenon only concerns residents of large cities. A few organic shops exist in large urban areas. An increasing number of organic products (though still limited) are sold in supermarkets (especially rice and coffee).
The expatriate community is the main consumer of organic products because the price of organic products is often a barrier for the rest of the population. In addition, Indonesian consumers have little awareness of organic products.
Rice is one of the main organic products sold.
According to the *USDA*, the organic market is expected to grow by around 8% per year over the next few years.

■ The distribution of organic products is growing in Iran. Late 2017, there were 67 organic shops. Supermarkets also sell organic products. Tehran organized a week dedicated to organic products in 2017.

■ The Israeli organic market was estimated at € 68 million in 2019. Organic products are increasingly popular with consumers. In 2019, organic food represented 13% of fresh

1- Urbanization is developing rapidly and 45% of Indian population will live in urban areas by 2030.

produce sales. As in other countries, supermarkets have launched organic private labels. Israelis are price sensitive, but more and more are willing to pay more for quality.

■ The Japanese organic market was valued at € 1.6 billion in 2018. Japan thus ranked 2nd in Asia, but only 15th globally. The Japanese organic market is developing relatively slowly. The main reasons are the lack of availability of Japanese organic products, a still underdeveloped organic products distribution network, consumer confusion between organic and "natural"[1] and the habit to consume washed and calibrated fruits and vegetables. The non-official recognition of participatory guarantee systems by the Japanese government is also a brake on sector development. The price also seems to be a brake on the development of the Japanese organic market. Health and food safety are the two main reasons to buy organic products in Japan. The *USDA* estimates that the Japanese organic market should grow little over the next few years.

In 2019, only 17.5% of consumers bought organic products once a week or more.
Organic products are mainly sold in supermarkets, in organic shops[2], in farmers markets, in restaurants and online. All large supermarkets such as *Aeon*, *Coop net* and *Life* have organic departments. 17 organic restaurants were recorded in 2019. Tokyo and Osaka have several organic cafes and shops. The French chain *Bio C'Bon* began to establish itself in Japan in 2016. According to *Business France*, it has been relatively successful[3]. These shops sell fruits and vegetables, dairy products, meat, fish, coffee and tea. The supermarket chain *Life* has opened its first organic and natural shop, *BIO-RAL* in central Osaka. There are a dozen other independent organic shops (some online[4]). Online retailer *Rakuten* has started offering organic dairy products. Organic products are also sold by *Theikei*, a subscription system. Sales through this network appear to have made good progress in 2020 due to the pandemic. Processed products represented 69% of the Japanese organic market in 2018.

■ In Jordan, organic products are sold in supermarkets, organic shops, drugstores, on farms and online. It is also possible to find organic products in many markets.

■ In Kazakhstan, most of the inhabitants are unfamiliar with organic products. Demand remains very low. There are very few stores selling organic products with organic food not gathered in the same place, so difficult to find.
Lack of awareness of the advantages of organic products is the first barrier to the development of the market.

■ In Kirghizstan, consumers do not fully understand what organic products are and their benefits. Besides, price always plays a crucial role in purchases.

■ In 2017, Kuwait's organic market was estimated at more than € 15 million.

1- According to a recent OMRP poll, 97% of Japanese people know the word organic, but only 5% understand it.
2- There are no organic supermarkets like in Europe or the United States.
3- At this time, we do not know what will happen to the Bio C'Bon shops in Japan. In France, Carrefour bought the Bio C'Bon shops in 2020.
4- Some players in the organic sector only market their products online to avoid the margins of supermarkets.

- There seem to be a few organic shops in Laos, especially in the capital.

- Organic products are increasingly popular in Lebanon and the organic market is growing steadily[1]. However, Lebanon is very dependent on organic imports.
About twenty organic shops have been recorded. Organic shelves have also been created in supermarkets. The organic range offered in hypermarkets is progressing. Organic products can also be purchased at farmers markets and health food shops. The subscription system to an organic basket is developing. There is also an increase in organic sales online.
Currently, due to the economic situation and the pandemic, the main brakes on market development are the price and the lack of availability of some products.
Fruits, vegetables, eggs, dairy products and bread are the main organic products sold in Lebanon.

- In Malaysia, the organic market is still quite modest (€ 2.1 million in 2017), but could develop rapidly, not necessarily in the near future. The notoriety of organic products is increasing. 39% of Malaysians bought an organic product at least once in 2019. Malaysians are looking for more healthy products than before, but the price and lack of availability are holding back the development of the organic market.
For the moment, it is mainly infant food products that they buy organically.
Organic products are available in supermarkets and in some organic shops. The organic range is growing in hypermarkets. Some points of sale have set up a small organic department. There does not appear to be any sale of organic products online.
It is mainly residents of large cities who buy organic products because of their higher income.

- In Myanmar, the share of consumers who regularly buy organic products is still low. It has only been a few years since the Burmese started to take an interest in organic products. Most of the organic consumers are women.
There are a few stores selling organic fruits and vegetables. Two weekly organic farmers markets were created in 2018 in Yangon and Mandalay. Some restaurants offer organic fruits and vegetables, especially those intended for tourists. There are no certified organic products in supermarkets[2] in Myanmar.

The most popular organic products are fruits, vegetables, apple cider vinegar, coconut oil, turmeric and cinnamon. Some products are imported from foreign countries and some are produced locally.
Health appears to be the main reason to buy organic products. The lack of awareness of organic farming is the first barrier to the development of the organic market. Price is also a big drag. Organic products are often perceived as luxurious.

- In Pakistan, it is consumers with high incomes who buy organic products. The main reason to buy them is health.

1- Estimated increase of around 20% per year.
2- All the supermarkets in Myanmar are owned by the same company which has multiple brands.

■ In 2017, the organic market in Qatar was valued at over € 11.7 million. Health has become a national issue. The organic range in supermarkets is increasing. Organic websites offer home delivery of organic products (e.g., *organicland.qa*). Organic shops have also been opened (e.g., *Organic Grocery* and *Good Life Market*).

■ The Republic of Korea organic market is highly dependent on imports. It was estimated at € 350 million in 2019. According to *Business France*, it enjoys strong development potential due to the growing interest in organic products. The South Korean organic market could reach € 447 million by 2025.
In 2018, 58.7% of South Korean households purchased organic products, although only 12.4% do so every week.
The distribution channels for organic products have diversified in recent years.
Large-scale distribution remained the first sales channel for organic products with 61.8% of the organic market in 2019. Currently, the supermarkets offer a range of over 300 organic products which are sold in dedicated shelves. Online sales represented 16.6% of the organic market and organic shops 14.4%. Online sales are increasing year by year. The number of organic shops is growing. Organic products have also been introduced in canteens and restaurants. The main organic products sold in the Republic of Korea are dairy products, coffee, sugar and snacks.
Health is the first reason to purchase organic products. The main brakes on organic market development are the poor knowledge of consumers on organic products and price. Korean consumers are increasingly looking for European organic products.

■ The Saudi Arabian[1] organic market has developed well in recent years, reaching € 52 million in 2018. According to *Business France*, the organic and "natural" food market is expected to grow by 14.8% on average per year between 2019 and 2026. More than 80% of organic food consumed in Saudi Arabia is imported.
The organic consumption is mainly localized in large cities.
More than two-thirds of the population is under 30 and is very connected. This new generation is looking for qualitative and healthy products.

■ In Singapore, so far, organic products are mostly bought by expats, the wealthy and part of Generation Y. However, interest in organic products is growing. The organic market reached € 10.7 million in 2019. It has grown by 23% since 2014.
Organic products are mainly sold in supermarkets, but the number of organic shops is increasing.
Price is the main brake on market development.
The main organic products sold are baby food, rice, pasta, oils and frozen products (fruits and vegetables, meats and seafood). *Business France* has observed a growing interest in organic wines.

■ In Sri Lanka, organic products are increasingly in demand. Some organic products are sold in supermarkets. Their range is progressing. Some organic products are sold online. There are a few farmers markets offering organic products. It is possible to find organic products in upscale restaurants.

1- In 2019, Saudi Arabia was the 1st economy in the Arab world and the 18th economy in the world.

Price is the main brake on organic market growth. It is mainly Sri Lankans with high incomes who consume organic products.
Health is the number one reason to buy organic products.

■ In Tajikistan, consumers do not fully understand what organic products are and what their benefits are. Price plays a crucial role in purchases.

■ The Taiwanese organic market amounted to more than € 82 million in 2019. According to the *USDA*, it should grow by nearly 50% between 2020 and 2050, thanks to the equivalence agreement concluded with the United States in May 2020. Taiwan has over 400 organic shops.

■ The organic market is developing quite rapidly in Thailand and reached € 83.4 million in 2019. It is dominated by generalist supermarkets, however, there is also a supermarket only dedicated to organic and dietetic products. The large retail offers more and more organic products to meet demand. There are more and more high-end restaurants using organic products.
Thai consumers are increasingly health conscious[1]. The affluent middle class is growing and is ready to spend more on food guaranteeing sanitary quality and traceability. Price nevertheless remains the main brake on organic market development.
Rice and tea are among the most consumed organic products.

■ The United Arab Emirates organic market was valued at € 113 million in 2015. Organic products are increasingly popular. In 2018, 38% of consumers bought more organic products than in 2017. Parents consider organic products to be a better choice for feeding their children. In 2019, sales of packaged organic products increased by 9% compared to 2018.
In supermarkets, the place dedicated to organic products is growing[2], particularly in *Carrefour* stores. The chains of organic shops are developing. About fifteen organic shops were recorded in 2019. The markets also offer organic products. Due to the pandemic, deliveries of organic products to homes have developed in 2020 in this federation.
Consumers in the United Arab Emirates are increasingly interested in organic products, especially those belonging to Generation Y because they place great importance on healthy foods consumption[3]. The consumption of organic products is mainly localized in large cities.

■ In Vietnam, the organic market was estimated at € 18 million in 2016. More and more stores in large cities offer organic products and the market could grow strongly in the coming years. The pandemic seems to have accelerated sales of organic products in Vietnam.
Supermarkets are the main place to buy organic products in Vietnam.
Like the Chinese, the Vietnamese are very concerned about food security and the harmful effects of pesticides on health. This phenomenon is even growing. They are looking for quality products. In the two big cities Hanoi and Ho Chi Minh City, 86% of consumers are willing to pay more for natural, organic and seasonal products. Families with children are the main buyers of organic products.
Although this is a niche market, organic fruit is slowly starting to gain ground in Vietnam.

1- Thai agriculture uses a lot of pesticides, causing health problems for the population.
2- The volumes offered increased by 60% between 2014 and 2019.
3- The authorities promote "healthy eating" to counter obesity problems. In addition, there is a growing interest in product traceability following the health crisis.

The price remains the main brake on market development, followed by the difficulties to find organic products outside the big cities.

Oceania: Australia in the lead for organic consumption

■ The Australian organic market is experiencing significant development. It doubled between 2012 and 2019, exceeding € 1.6 billion.
65% of Australian households bought an organic product at least once in 2019. Organic buyers do so more regularly and in more categories than before. 51% of organic buyers said they increased their spending on organic products in 2019.
Even if the distribution of organic products is diversifying, supermarkets remain the main sales channel[1]. The three large retail chains offer a wide range of organic products, some of which are private label. Organic grocery shops are appearing and the number of websites selling organic products is growing. The pandemic has accelerated the development of organic sales online. Many companies now offer deliveries of organic products. Consumers also buy organic products in the markets. Some canteens offer organic products, but there are no statistics.
Australian Organic has not identified a typical organic consumer.
Two-thirds of Australians believe that organic production is better for the environment. The main reasons to purchase organic food are health and environmental protection. Price remains the main barrier to buy organic products, but the gap with conventional products is diminishing with the growth in the availability of organic products. Another problem is the difficulty in identifying that a product is truly organic.
The main organic products consumed are fruits and vegetables[2], beef[3], ready meals and dairy products.

■ New Zealand's much smaller organic market is also growing. It was estimated at € 145 million in 2017.
$^{4}/_{5}$ of New Zealanders bought organic products at least once every two weeks in 2017. The annual growth rate of the organic market is estimated at 8.1%. Organic products still represented only 2.2% of food sales in supermarkets in 2017. Supermarkets are the main channel (88% of purchases in 2017), but there are also organic shops.
For 67% of New Zealanders, protecting their health and that of their family is the number one reason to buy organic products. New Zealand consumers increasingly consider these products to be safer and healthier than conventional products, helping to grow sales and launch new products.
Fresh produce represents around half of the organic market.

■ In the Pacific Islands, the organic market is growing slowly. However, it should progress over the next few years, thanks to the growing interest of the tourism sector in organic products. In 2016, specifications for the use of organic products in tourism in the Pacific were developed. The first certifications were scheduled for 2018.

1- More than 90% of shoppers said they have bought organic products in supermarkets at some point in 2019 and 62% frequently bought organic products in this channel.
2- More than 6 in 10 buyers said they bought organic fruits and vegetables at least once in 2019.
3- 90% of the organic meat market in 2018.

The trademark *Organic Pasifika* is used to communicate about the use of organic products in the Pacific Islands.
Domestic organic markets are also developing somewhat thanks to subscriptions to organic baskets and sales at farmers markets, particularly in Niue and Samoa. For the moment, the organic market is more developed in Fiji than in the other islands of Oceania. Fiji also opened its first point of sale dedicated to organic and sustainable products in 2018.

Coconut and its derivatives are the main organic products sold in the Pacific Islands.
The biggest challenge by far is the cost of certification for small farmers to access regulated markets. A PGS offers a partial solution to this problem. The other brakes are transport costs, pooling of supply to have a stable and quality delivery, phytosanitary restrictions on inputs (seeds and plants) and exports.

Latin America: a still modest organic market

A high share of organic production is exported. Nevertheless, a domestic market for organic products is developing in several countries.

- In Argentina, the organic market was estimated at € 19.2 million in 2017, i.e., between 1 and 2% of the food market. Only 3% of national organic production is consumed in the country. The *USDA* was forecasting growth in Argentina's organic market of around 40% for 2018. However, inflation threatens to dampen growth in the years to come. A recent national survey conducted by the *Universidad Argentina de la Empresa* and the consultancy firm *Voices!* revealed that 46% of those surveyed consumed organic products in 2019, double the figure of five years ago.
Supermarkets are the main organic sales channel.
Consumers perceive organic products to be of better quality and safer than conventional products.

- In Belize, there is a possibility to subscribe to receive products grown without pesticides. This system is managed by *Pro-Organic Belize*. It was created in October 2016 in the region of San Ignacio. It then spread to the Belmopan region. It is also planned to organize deliveries to the capital soon.

- For several years, organic products have been introduced in canteens in three Bolivian towns. The COVID-19 pandemic has caused a significant increase in demand for organic products in this country. Producers of organic fruits and vegetables have created food platforms to deliver consumers to fixed points. Orders are placed through *WhatsApp* and other social networks. *Agrobolsas Surtidas* is one of the most active platforms. These distribution networks existed before the pandemic but have grown significantly with the health crisis.

- In 2019, Brazil was the first organic market in Latin America with € 1.018 billion (+15% compared to 2018). Despite the difficult economic situation in Brazil, organic sales continue to grow, thanks to growing consumer interest in healthy and sustainable products. According

to a 2019 survey published by *Organis*[1], 46% of consumers would like to find more organic, natural and healthy products on supermarket shelves. According to the same survey, 19% of consumers said they had purchased organic products in the past 30 days.
According to a survey by *Associação Paulista de Supermercados* and *Super Varejo magazine*, 39% of consumers bought at least one organic product in 2019.
Sao Paulo is the state with the most developed organic market.
Two-thirds of organic sales are made in supermarkets, but the organic range is growing in all sales channels. The Brazilian supermarket chain *Pão de Açúcar* is the main seller of organic products in Latin America. Some of the organic products it sells are under the *Taeq* private label. Its competitor, *Carrefour Brazil*, aims to achieve 20% of its food sales in organic by 2022. In 2019, the organic range of *Carrefour Brazil* comprised 650 products. Dedicated departments are gradually being established in its supermarkets.
It is possible to buy organic products in the markets[2]. There are not yet many organic shops. The organic chain *Malunga* has 4 shops. More than 3,000 organic products are offered there.
As in Bolivia, consumers can order organic products using *WhatsApp*.
Due to the health crisis, organic sales increased by more than 50% in the first half of 2020 compared to the first half of 2019.
Organic sales online developed during spring 2020.
The State of Sao Paulo has passed a law requiring that meals served in school canteens be organic. Organic products are also being introduced to schools in other states, such as Parana.

The main reasons to consume organic products are health, environmental protection and quality. The price remains the main drag. According to the *Organis* survey, 75% of consumers surveyed found organic products too expensive[3]. The other brakes are the lack of availability and variety in the stores.
The main consumers of organic products are families with children and with good incomes.
Vegetables and fruits remain the most consumed organic food in Brazil. There was a sharp increase in the consumption of organic vegetables between 2017 and 2019.

■ The Chile organic market has grown a lot in recent years, mainly due to the growing interest of the population for these more environmentally friendly products. However, around 95% of organic production is still exported. The organic market has been estimated at just over € 13 million for 2019. 40% of the organic market is supplied by Chilean products that are not always certified (mainly vegetables). The rest is imported.
Organic products are sold in organic shops, supermarkets (especially *Jumbo* stores), online, markets (including around 20 dedicated to organic) and through basket systems. Short circuits have a greater weight in the marketing of organic products than in those of conventional products. It is also possible to taste organic products in some restaurants.
In 2019, According to the *Opinando Online panel*, 29% of Chileans reported consuming organic products. Health, respect for the environment and taste are the main reasons to buy organic products.

1- Survey carried out among 1,027 people.
2- According to the State Secretariat for Agriculture, 24 organic or agroecological fairs are held every week in Grand Vitória. In the federal district, over 30 markets offer organic products.
3- However, 72% of consumers surveyed believe that the price difference is justified.

ORGANIC SECTOR IN THE WORLD

The main brakes on organic market development are the perceived high price, the lack of awareness and information about organic products and insufficient control by the authorities on compliance with regulations.

■ In Colombia, the organic market was estimated at € 9.4 million in 2015. Coffee is the main organic product sold. Certified organic products can be found in *Carulla* and *Jumbo*[1] stores, especially in Bogotá and in a few organic shops in cities such as Medellín, Cartagena and Bogotá. It is possible to find non-certified organic food or under PGS in small open-air markets in almost every major city in the country. Since the start of the COVID-19 pandemic, there has been a development in the online sales of organic products by small businesses, which are generally uncertified.
It is mainly Colombians with high incomes who consume organic products.
Health appears to be the main reason to consume organic products.
The main barriers to the development of the organic product market are their price, considered too high, the lack of promotion of organic products and the lack of clarity on what is organic.

■ In Costa Rica, organic products are sold in hotels and restaurants, in supermarkets, in some organic shops, in farmers markets, through basket subscriptions and on farms. The organic range of supermarkets is expanding. On the other hand, organic products have not yet been introduced in the canteens. The largest organic store, *Green Center*, was established 10 years ago. It is in Escazú and offers over 4,000 organic products. The *CR Organico* app allows consumers to buy organic products directly from farmers.

The main organic products sold in Costa Rica are fruits and vegetables, dairy products, goat and bovine meat and coffee. The main brake on the development of the domestic organic market is the price.

■ The Cuban organic market was estimated at € 19.9 million in 2015.

■ In the Dominican Republic, the organic market was estimated at only € 90,000 in 2015. However, the *USDA* expected this market to grow strongly in the years to come.

■ In Ecuador, there are more than 1,000 references of organic products in mass distribution. Each year, the organic range of this distribution channel increases by one hundred products. Organic products are also sold in markets, online and in some organic shops. The main organic products sold locally are bananas, cocoa, coffee, quinoa and vegetables.
The brakes on organic market development are the price and the lack of availability.

1- In particular, they offer organic products imported from Europe and the United States.

■ In Mexico, the organic market was estimated at € 36.6 million in 2017. USDA forecasts annual growth of around 8% over the next few years. Consumers are increasingly interested in organic products. The main consumers of organic products are the elderly.
Health[1] seems to be the main reason to buy organic products. The price remains the main brake on organic sales growth.

■ In Peru, there has been no assessment of the organic market since 2010, a year for which it was estimated at € 14 million. In this country, the growth of the organic market is particularly linked to the interest in gastronomy. It is possible to find organic products in markets, in organic shops (like *Flaura & Fauna*) and online (example: *Bio Point*). The sale of organic products in these last two channels is growing.
The concept of organic farming is not well known to Peruvians and is often associated only with fruits and vegetables.

■ In Uruguay, consumption of organic products also seems to be on the rise. Organic products are sold in supermarkets, markets, organic shops and online.

Africa: a still relatively underdeveloped organic market

■ Organic productions are primarily intended for export.

■ In Algeria, the organic market is still relatively underdeveloped, but the number of products available is increasing to meet the demand of consumers looking for healthy food. Supermarkets and restaurants offer some organic products. These are imported prepackaged products. There are also some organic shops that offer local organic products (e.g., oils, dates, figs, etc.). Organic products are also sold in markets and on farms.
The price and low availability of products appear to be the main brakes on the development of the Algerian organic market. In the years to come, however, the market could grow strongly with the development of organic production.

■ In Benin, there are a few basket subscription systems.

■ In Burkina Faso, the distribution of organic products changes from year to year. It is mainly done by direct delivery from producers to customers, to the farm, on weekly markets[2], in some organic shops (e.g., *Bio Farmer Market* in Ouagadougou and *Eco-Bio*), some supermarkets and restaurants (e.g., *Rosa dei Venti* in Ouagadougou). The production chain is poorly organized and structured, therefore organic products are rare in supermarkets.
Among the consumers of organic products, there are both expatriates and Burkinabes.
The popularity of organic products is increasing because there are many food poisonings linked to pesticides or the use of chemicals in food preservation. People are therefore becoming aware of the need to consume organic products.
The organic products consumed in Burkina Faso are mainly from local certification. These include vegetables, grains, legumes and fruits.

1- Health is seen as a national challenge.
2- There are more and more fresh organic products on the markets.

ORGANIC SECTOR IN THE WORLD

The main brakes on the development of organic products are the lack of financial means for farmers to produce in quantity and variety[1], irregular production, lack of knowledge of organic products (even in wealthy circles), the means of organic companies that are insufficient to promote their products and the lack of support from players in the organic sector.

■ In Burundi, organic market is not developed. Some organic products are sold in supermarkets.

■ In Cameroon, consumption of organic products remains very marginal. However, in most supermarkets owned by foreign chains, there is a section for organic products.

■ Even though organic is still a niche market (less than 2% of the food market), its sales are growing in Egypt. Organic products are sold in supermarkets, in a few organic shops, in drugstores and directly by farmers. Many supermarkets now have an organic section. Large supermarket chains such as *Carrefour* or *Hyper One* are expanding their organic ranges. There are also a few organic products in catering. Organic sales are mainly located in the urban areas of Cairo and Alexandria. In these cities, foreigners represent between 60 and 70% of organic consumers. A significant share of fresh organic fruits and vegetables are sold directly by farmers.
Most of the organic food produced in Egypt nevertheless remains intended for export markets.
The main reasons to buy organic products are quality, health and environmental protection. The main brakes on market development are the high cost of organic products compared to conventional foods, the low-income levels of the Egyptian population[2], the lack of awareness of organic products, the lack of confidence[3] as well as the low availability of some organic products[4]. Besides, the problem of contamination has worsened in recent years, to the point that many farmers lose their organic certification due to residues found in their production.

■ In Ethiopia, the organic market amounted to € 13 million in 2018. However, organic products still seem little known to Ethiopians.

■ In Ivory Coast, the organic market is still modest and reserved for the upper classes or expatriates due to high prices. Organic products are sold in supermarkets. Local organic fruit and vegetable juices are sold in dedicated shops.

■ The Kenyan organic market is also developing, even if it is still modest (€ 3.9 million in 2018). Organic products are available in supermarkets, markets and restaurants. It is more and more common to find an organic section in supermarkets. Organic farmers markets are developing. The main reason to buy organic products is food security. The main barrier to market growth remains the price. It is mostly wealthy consumers who have traveled who consume organic products.

1- The low production results in a high cost which does not encourage consumers to buy organic products.
2- Only 5% of the population are well-off.
3- Until 2017, the use of the term organic was not protected at all in Egypt.
4- Not all fruits and vegetables are available organically. Many basic products are not available organically either: dairy products, eggs and starchy food.

- In Liberia, organic products (not certified) are consumed locally.

- In Madagascar, the domestic organic market is embryonic. Supermarkets are the main distribution channel for organic products. They mainly sell imported grocery products certified according to European regulations. Nevertheless, a small range of national organic products (fruit juices, jams, condiments, essential oils, honey, etc.) is beginning to appear for direct sale, in supermarkets or in company stores. Besides, there are a few companies and farmers organizations, which sell organic vegetables on the markets of the capital with varying degrees of guarantee or certification.

Organic consumers are often characterized by high purchasing power (Malagasy middle and upper classes and expatriates) and having relative knowledge of what the term organic covers. However, urban consumers with less purchasing power are concerned and eager to access healthy and natural foods. According to *SYMABIO*, market studies to characterize the development potential in the main urban centers of the country are still necessary to refine local production strategies, adapted certification and consumer information to allow access to organic products at the market to a greater number of consumers.

- Some organic products have gained popularity in Mali in recent years: shea, sesame, fonio, mango and cashew nuts. These products are only available in a few supermarkets. Direct sales remain the most important distribution channel for organic products in Mali, particularly through baskets subscriptions. There are also five markets offering organic products in the Malian capital, Bamako. Consumers are happy to find local organic products there.

Long considered a luxury habit, organic consumption is gradually becoming part of culinary habits in Mali.
Health is the main reason to buy organic products in Mali.
The main brakes on organic market development are the small volumes available (due to the high certification costs for organic farmers, the lack of production equipment and support for training, the difficulties of access to water and land and low-paying prices[1]) and low consumer awareness of organic products benefits.

- Morocco has become the first organic market in Africa. It was valued at € 58.5 million in 2017. However, Moroccan organic production is still mainly oriented towards export. The Moroccan organic market is nevertheless heavily dependent on imports.

Moroccan consumers still often confuse certified products with fresh products. However, they are more and more interested in organic products and can find it in more outlets. Not long ago, the organic range was still very limited in mass distribution, but it has progressed a lot and small organic departments are starting to develop in some chains. In recent years,

1- There is not always a difference between the prices of organic products and conventional products.

organic distribution has grown. There are about twenty organic shops[1], four of which belong to the Moroccan network *Green Village*[2]. Organic products are also sold in health food shops, drugstores, on farms, by subscribing to baskets or in the markets[3]. Organic sales online are growing. The sale of organic products in bulk in distribution is not allowed by Moroccan regulations. Consumers therefore often prefer to buy organic baskets from the farm.
The supply of fresh local organic fruits and vegetables is growing.
The Moroccan organic market is mainly concentrated in large cities. Organic products are mainly purchased by young people and pregnant middle-class women. The first reason to consume organic products is health[4]. The current pandemic has accentuated this desire to eat healthy products.
The main brakes on market development are the price, insufficient availability and ignorance of organic products.
According to the *USDA*, the Moroccan organic market is expected to grow by around 8% per year over the next few years.

■ In Mozambique, the inhabitants know very little about organic products. Less than 2% of the population have ever seen some. However, organic products can be purchased directly from small farms like the one in Machambas. Organic production techniques are not very well known.

■ In Namibia, Dutch chain *SPAR* has opened an organic department in its Maerua store, with fresh and processed products as well as organic cosmetics.

■ In Niger, only a small part of the population is interested in organic products. They are mainly residents of the capital, Niamey. Nigeriens often confuse "organic" and "natural". In supermarkets[5], it is possible to find some imported processed organic products. There are no organic shops. It is possible to buy organic fruits and vegetables from a few farmers. Some hotels also buy their supplies from them. Some organic processed products such as moringa herbal teas are sold in drugstores or online (rare).
The brakes on organic market development are the low availability, the lack of knowledge on organic products, as well as the absence of technical references for a good mastery of organic production.

■ In Nigeria, organic consumption remains very marginal due to the low purchasing power of a large part of the population. However, they are increasingly popular, thanks to the advocacy carried out by various public and private institutions. The demand for organic products is increasing, as is the number of organic operators (importers, exporters and traders). A few organic restaurants have been created. It is also possible to find organic shelves in some supermarkets.
Price remains the main brake on organic market development.

1- Not necessarily totally organic
2- Prior to 2018, these were La Vie Claire shops.
3- Weekly organic markets are organized by RIAM in Casablanca, Rabat, Mohammedia and Marrakech.
4- The Moroccan population is more and more sensitive to healthy food. For many it is the term "beldi" which is used (traditional, local). But beldi does not necessarily mean organic.
5- These are very modest in size compared to those of the major African capitals.

■ In Senegal, in the emerging middle class, organic products popularity is increasing a bit. Senegalese can buy organic products on farms, in 3 conventional markets in Dakar, in supermarkets[1] and in organic shops.
The main barriers to the development of the organic market are the price because organic products sold in Senegal are often imported, the lack of a support policy for the organic sector, the lack of valuation for farmers and the low number of consumers.

■ South Africa is one of Africa's main organic markets. It has been estimated at € 27.3 million for 2019. According to *Business France*, it could approach € 35 million by 2023.
The main distribution channel for organic products is supermarkets. Most of the big chains have an organic range. The *Woolworths* and *Pick n'Pay* stores already have a significant organic range.
Organic products are also sold in organic shops and health food shops. There is only one real chain of organic shops: *Wellness Warehouse*. It has about thirty shops. The other shops are independent or belong to very small chains. The *Dis-Chem* drugstore chain, which has 170 outlets, also markets some organic products. There are also many organic shops online, but they are not always profitable. South Africans also buy organic produce on farms and in markets. As the organic sector is very unstructured, local organic producers sell on farmers markets or sell organic baskets.
Organic products are mainly consumed by the more affluent inhabitants of large cities[2], especially in Cape Town/Stellenbosch, Johannesburg/Pretoria and Durban.
Most of the organic certifications made in the country are based on foreign standards, for export.
Milk remains the most popular organic product, ahead of infant foods, pasta and rice.
The main brakes on organic market development are the lack of knowledge and awareness of South Africans on organic products, the price and the lack of availability because most of the certified organic production is exported.

■ In Tanzania, organic products are sold in supermarkets, in some organic shops and in farmers markets. They are also sold online (e.g., *WhatsApp Pakacha group*) and can be found on the menus of some hotels. The number of organic products available on the Tanzanian market is increasing, both fresh and packaged. There are fruits and vegetables, tea, coffee, aromatic herbs, spices, oils and yogurts[3].
The organic products available are both from national production and imports.
The availability of organic products, which varies according to the seasons, seems to be the main barrier to the development of the Tanzanian organic market.

1- The rise of the middle class is changing consumption habits: consumers are getting closer to European practices and are starting to favor supermarkets over traditional markets, which nonetheless retain a loyal clientele.
2- Two-thirds of South Africans are city dwellers.
3- Organic yogurts are only coming from abroad and are the only organic dairy products sold in Tanzania.

■ In Togo, it is possible to find unprocessed organic products on farms, in some supermarkets[1] and in some local markets. A few subscription systems to organic baskets have been put in place. Organic products sold on farms are generally not certified.
The main brakes on organic market development are the lack of availability, the price and the lack of knowledge of the Togolese on organic products. The lack of availability is due to several difficulties encountered by producers: difficult access to certification services for producers, high certification costs and lack of means of production.

■ In Tunisia, although organic production is fairly developed, the domestic market is still very little, the bulk of production being for export. Consumers are insufficiently informed about organic farming. However, organic products are sold in organic shops and online and very recently, on a smaller scale, in mass distribution. Organic shops have appeared over the past ten years and are concentrated in the capital. The range of fresh produce has grown in recent years but remains limited and irregular. The range of processed products also remains limited. The local organic food products available on the market are not very diversified: mainly olive oil, cereal-based products, honey and aromatic plants.
A large organic market was created in Tunis in 2010 but it ended up closing due to supply problems.
The main brakes on organic market development are the lack of availability, prices, lack of information and awareness of the benefits of organic products.

■ In Uganda, it is possible to buy organic products in the markets, to have them delivered to your home and to buy them on farms. There is also an organic shop managed by Nogamu. The main brake on market development is that organic products are not well known to consumers.

Some trends common to many markets

⇨ The organic range in supermarket is growing and the market share of this channel is often on the rise.

⇨ There is a development of organic products under private labels in supermarkets in quite a lot of countries.

⇨ Health appears to be one of the main reasons to purchase organic products in many countries.

⇨ Young people, especially Generation Y, consume more organic products than their elders.

⇨ Online food shopping is growing. This phenomenon has often been accelerated by the pandemic.

⇨ Local origin is a very important selection criterion that often takes precedence over organic.

1- However, there are very few supermarkets in Togo.

⇨More and more consumers are becoming vegetarians or vegans[1]. There has been an increase in the number of people opting for a vegan diet for environmental reasons.

⇨ Consumers do not seem to be sufficiently informed about organic products in many countries.

Organic markets tomorrow?

■ The future growth of the organic market will depend both on the increase in area, on the structuring of the sectors, on the development of the introduction of organic products into the distribution channels and, of course, on the consumers themselves.

■ The difference in growth speed between the organic market and organic production remains one of the main brakes on the development of organic consumption. Between 2008 and 2018, the global organic market almost tripled, while the areas grown organically doubled. Even if, in recent years, organic production has developed more rapidly than before, there are still areas where it is growing less quickly than the market, such as the United States. Experts expect the market to grow further over the next few years. Of course, the growth rate will continue to depend on the increase of organic areas. The growth in area is strongly linked to the public policies that will be put in place over the next few years. In addition, according to *Ecovia Intelligence*, the increase in land has concerned more meadows than crops.

■ The development of some markets will be linked to the structuring of sectors and the creation of processing tools. Many countries export raw organic products and import processed ones. In addition, some products are not available organically although they are locally produced in conventional.

■ According to *Ecovia Intelligence*, regarding distribution of organic products, supermarkets have become the main channel in most markets. The situation seems, in fact, a little more nuanced because direct sales carry a lot of weight in countries where organic consumption is still limited. It is mainly in Europe and North America that supermarkets have a very important weight. In recent years, the supermarkets chains have strongly developed their organic ranges, in particular under private labels. In the United States, the organic supermarket brand *Kroger*, represented around € 1.8 billion in sales in 2018. The development of the organic range in supermarkets (especially in hard discount for Europe) has contributed to the democratization of organic products.

Organic distribution is increasingly suffering from competition from supermarkets. To continue to develop, it will have to innovate more and more.

[1]- *The Economist has named 2019 "Year of the Vegan".*

ORGANIC SECTOR IN THE WORLD

Ecovia Intelligence expects sales of organic products to grow online and through basket-type delivery systems in Europe and North America. This also seems very likely to us because of the more marked interest of the younger generations for organic products.
In 2020, the COVID-19 pandemic accelerated the shift to online food shopping in many countries. It has also generated commercial innovations, especially to compensate for the loss of sales to canteens and restaurants.
Overall, we must expect an increase in the organic sales in all channels, more or less quickly depending on the country. Moreover, according to the *FIBL*, the health of the organic market depends on the diversity of the distribution of organic products.

■ Concerning consumers, according to *FIBL/IFOAM*, for the consumption of organic products to become more democratic, the number of consumers buying organic products regularly should increase.

As the 2019 *FIBL/IFOAM* report highlights, the demand for organic products is very concentrated. It is necessary that organic markets develop all over the world so that organic products are not consumed only by the richest countries. It is necessary to go beyond this image of a luxury product to develop organic consumption everywhere. In many countries, organic growth will, of course, be strongly correlated with that of the average income of the population. Promotion plays a major role in the growth of organic consumption. It is at the heart of several development programs. Consumers have evolved, their expectations and eating habits are no longer the same: they are more concerned about health and the preservation of the environment, especially young people. In addition, they are attracted to local products. According to *Shona Wilkinson Nutrition*, consumers are willing to pay more for products that demonstrate environmental responsibility. Today, the organic label faces competition from many other food labels with ethical or sustainability attributes. According to *Ecovia Intelligence*, there are currently 200 eco-labels. There is also competition from "free" products, such as "gluten free" and "lactose free".

■ Bionext estimates that if current growth continues, the European and North American markets will each have crossed the € 100 billion mark by 2025.

■ The current pandemic is having both a positive effect on the organic market because consumers are looking for healthier products and a negative effect because the economic recession is reducing the income of part of the world's population. It is still unclear what will win.

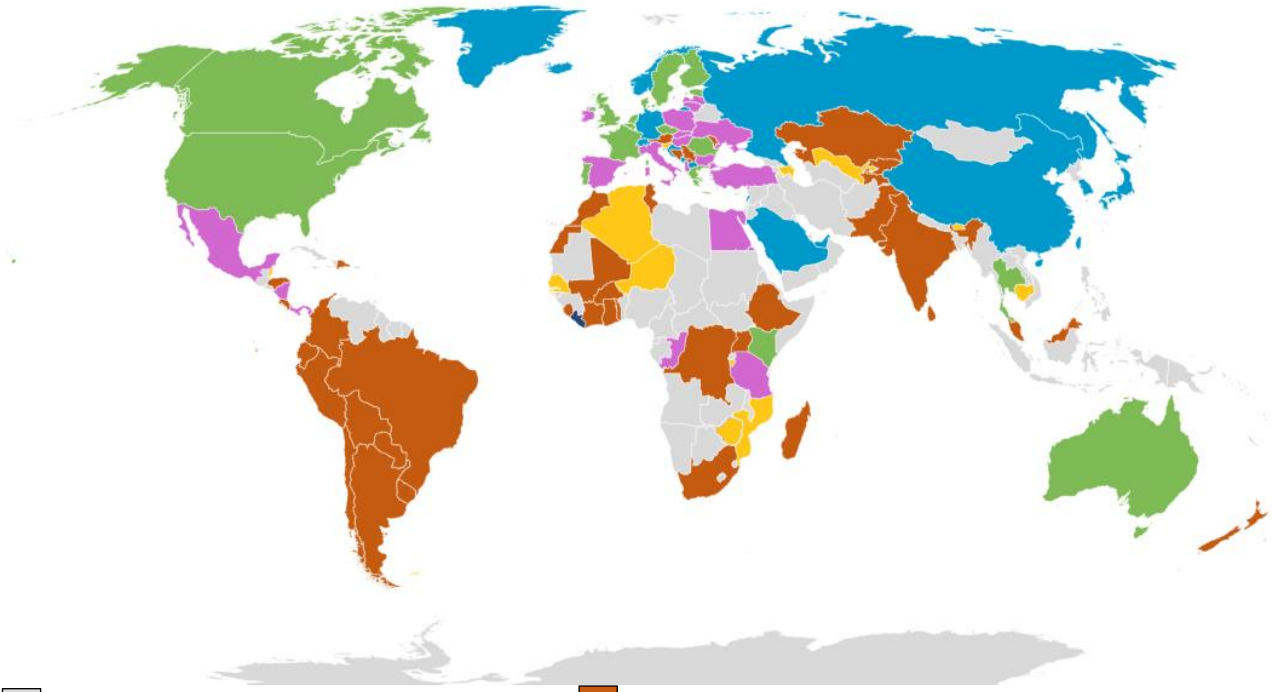
Global flows of organic products

In this chapter, the terms imports and exports include flows within the European Union.

Country Profiles

■ Among the top ten world markets for organic products, seven are both importers and exporters: United States, France, China, Canada, United Kingdom, Sweden and Denmark, two are mainly importers: Germany and Switzerland and another exports more than it imports: Italy.

Countries profile depending on imports and exports of organic products



Source: Agence BIO

■ In Asia, the situation is heterogeneous: some countries export a lot of organic products, while others import them.

■ Latin America countries are globally much more exporters of organic products than importers.

■ In many African countries, organic products are almost exclusively intended for export.

■ The Pacific Islands are globally exporters of organic products, sending abroad a very large part of their production.

Main importing countries of organic products

■ The United States, the European Union, China, Canada and Japan are the world's main importers of organic products.

■ The *USDA* tracks the flow of some organic products (mainly fresh products) in the USA. It estimated the imports of these organic products at € 1.6 billion in 2018, or 16% of the country's agricultural imports. In recent years, organic imports have increased while exports have remained rather stable. In 2018, the main organic supplier to the United States were Mexico (15% in value), Peru (8%), Brazil (7%), Spain (7%), Italy (6%) and Argentina (6%). Among the organic products monitored, the most imported by the United States are coffee (€ 293 million in 2019), bananas (€ 239 million), blueberries (€ 176 million), soybeans (€ 147 million), olive oil (€ 136 million) and cereals[1].

■ In 2019, the EU imported 3.24 million tons of organic products from third countries (excluding Switzerland and Norway). This figure is almost stable compared to 2018 (+0.4%). China, Ukraine and the Dominican Republic remained the top three suppliers of organic products to the European Union in 2019, with a share of 13% by volume for China and 10% each for the other two countries. Tropical fruits, nuts and spices were the main organic category imported by the EU from Third Countries (27% by volume), ahead of oilcake (12%). Oilcakes accounted for 75% of organic imports from China in 2019. Cereals were the main organic products imported from Ukraine. Organic imports from the Dominican Republic consisted mainly of tropical fruits, nuts and spices. In 2019, 32% of imports by volume were made by the Netherlands, 13% by Germany, 12% by the United Kingdom and 11% by Belgium.

■ Chinese organic imports amounted to € 52.4 billion in 2018. About 30% of organic products sold in Chinese supermarkets are imported. China mainly buys meat, oils and dairy products. The Chinese are increasingly interested in food from abroad. China imports a lot of organic products for baby food. Australia is China's main supplier of organic produce. It is followed by the United States, Europe and Japan.

■ In 2019, Canadian organic imports amounted to € 540.5 million[2]. Coffee, bananas and strawberries were the main organic products imported into Canada.

■ Switzerland is quite dependent on imports. In 2016, around a third of organic products sold in this country were imported. The European Union is probably its main organic supplier.

■ Japan is the third largest export destination for organic products from the USA (€ 44.5 million in 2019). This market is very dependent on imports because a small part of its agricultural land is devoted to organic farming. A lot of soybean and organic fruits are imported.

1- The production of organic cereals in this country has been slow to take off and it is not sufficient to meet the needs.
2- They are a little higher than organic exports from Canada.

- Organic products imported into the Republic of Korea come mainly from Peru, the United States, Germany and Poland. It imports various types of organic products: processed fruits and vegetables, wines, dairy products, bananas, wheat, infant foods and sugar. Between 2015 and 2018, organic imports from the EU increased by 72% in volume[1].

- Currently, between 75 and 80% of organic products consumed in Russia are imported. The main origins of organic products are France, Germany and Italy.

- Iceland is very dependent on organic imports because of its quite limited agricultural production. According to the *Producers' Association of Iceland*, organic accounts for around 10% of food imports.

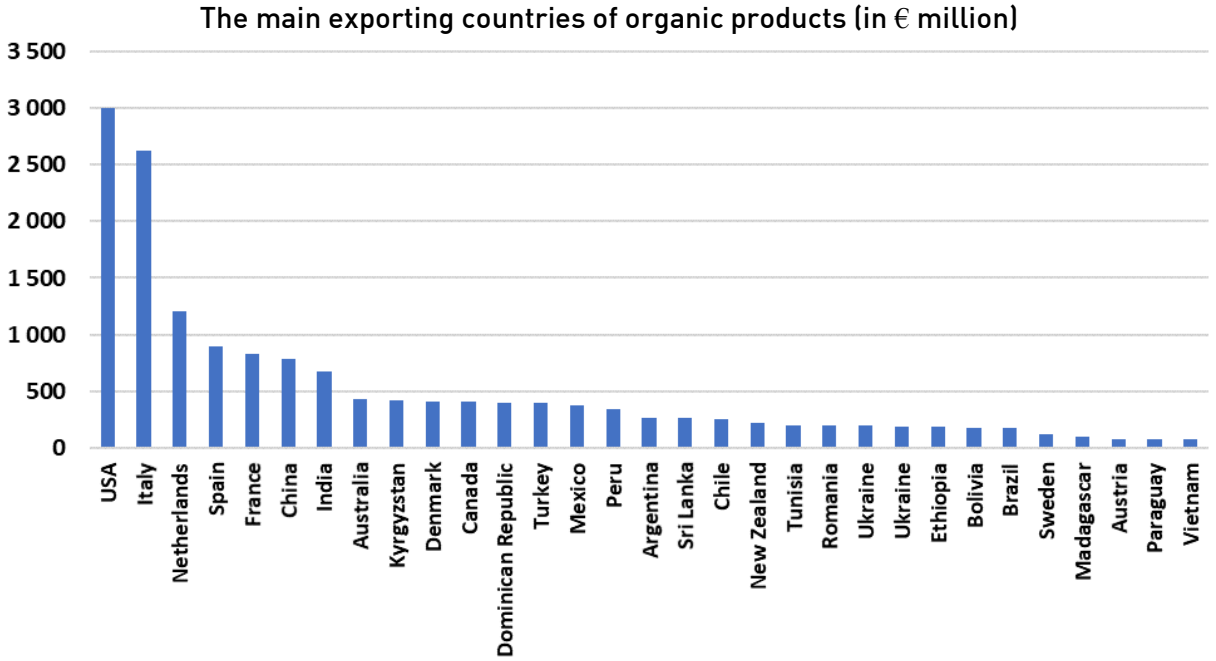
- Norway is also heavily dependent on imports of organic products. In this country, organic areas are decreasing while organic demand continues to increase. Norway imports a lot of organic cereals.

- About 80% of organic food consumed in Saudi Arabia and Lebanon is imported.

- Some countries, such as the United Arab Emirates re-ship part of their organic imports.

Main exporting countries of organic products

- The United States, Italy, the Netherlands and Spain are the main exporting countries of organic products worldwide. France comes in fifth place.
The EU countries sell a significant share of organic products within this zone.



N.B. : Data in value are not available for all countries exporting organic products.

Source: Agence BIO

1- 6,171 tons in 2018.

ORGANIC SECTOR IN THE WORLD

■ Organic exports from the United States are estimated at around € 3 billion. The USDA specifically tracks exports of some categories of organic products. Fruits and vegetables are the main organic products exported by the United States. They export organic products to many countries. In 2018, the top destinations were Canada (47% by value), Mexico (18%), Japan (7%), Republic of Korea (6%), Taiwan (4%) and the European Union. The main EU destinations for organic products are the United Kingdom (2% of organic US exports), France, the Netherlands, Belgium, Spain, Germany and Ireland. They are also increasingly selling organic products in East Asia and the Middle East.

■ Italian exports of organic products grew by 8% during the year ending August 2020, exceeding € 2.6 billion. Italy exports a lot of organic fruit, vegetables and wine. In 2018, Italy exported 88% of its organic wine production. France and Germany are the main destinations for Italian organic products, with 22% and 17% respectively in value in 2018. Europe represented 77% of organic exports in 2018.

■ In 2016, the Netherlands exported € 1.2 billion of organic products. Fruits and vegetables are the main organic products exported. This involves a lot of re-shipments of organic products from other countries, especially the European Union.

■ Spain exports a significant part of its organic production. In 2017, Spanish organic exports were valued at € 895 million. 90% of Spanish organic exports go to other EU countries. Spain also exports organic products to the USA, Mexico, China, the Republic of Korea and Australia. It exports a lot of fruit and vegetables (nearly € 348 million in 2017), olive oil and wine. It exported 91% of its organic wine production in 2018.

■ In 2019, French organic exports (including to EU countries) amounted to € 827 million. Wine accounts for a significant share of exports (57% in value in 2019) [1], ahead of grocery products (24%). In 2019, 67% of French organic exports by value went to other EU countries. France also exports some dairy products, aquaculture products, fruits and vegetables, mainly to other EU countries.

■ Chinese organic exports fell by 29% in value between 2016 and 2018, reaching € 781 million. According to *Business France*, the COVID-19 crisis has reduced Chinese organic exports. Organic exports only accounted for 1.5% of the value of its organic imports in 2018. China mainly exports processed vegetables, soybeans, honey, grains, green tea, ppam and beans. The main destinations for Chinese organic products are Japan, the United States, Southeast Asia and the Republic of Korea. In 2019, China was the main exporter of organic products to the European Union.

■ India exports over 300 organic products to around 20 countries. In 2019, Indian exports of organic products exceeded 614,000 tons for a value of € 674 million. They are progressing very quickly. The main organic products sold abroad are oilseeds[2] (48% of exports by value in 2019), cereals, tea, nuts

1- In 2019, 43% of the volumes of French organic wines that were marketed were intended for export.
2- Mainly soybean oilcakes.

and spices. 52% of Indian organic exports were destined for the United States in 2019. The other main destinations were the European Union with 29% (especially Germany) and Canada with 9%.

- In 2018, Australian organic exports were estimated at € 434 million. The United States is the first export market for Australian organic products. In 2018, Australian organic exports to the USA increased by 60% in volume compared to 2017. Southeast Asia (including China) comes in second. Australia mainly exports organic beef (€ 218 million in 2019). The USA is Australia's number one destination for organic beef and lamb. Australia exports dairy products to Asia, mainly to China. China buys a lot of organic baby food products from Australia. The Republic of Korea is the main destination for its organic soy products. Norway is the leading consumer of Australian organic wines.

- Kyrgyzstan's organic exports amounted to € 418 million in 2017. It mainly exports dried fruits (apricots and prunes), blackberries, cotton and nuts. The main destinations for Kyrgyzstan's organic products are Germany, Switzerland, France, Turkey and Poland.

- Danish organic exports amounted to € 405 million in 2019 (+4% vs 2018). Denmark exports mainly to other EU countries (76% in value in 2019), in particular Germany (40%) and Sweden (13%). For several years, however, it has been developing its exports of organic products to Asia (16%), especially to China (7%) and the Middle East. The main Danish organic products exported are dairy products and pork.

- Canada exported € 404 million of organic products in 2017. It exports mainly cereals, oilseeds and processed products, based on fruits and vegetables, but also meat and seafood. The Canadian government wish to increase organic exports.

- The Dominican Republic is the main exporter of organic products in Latin America. It exported € 401 million of organic products in 2018. It mainly exports bananas and cocoa. The USA and Europe are the main destinations for Dominican organic products.
In 2019, the Dominican Republic was the 3rd exporter[1] of organic products to the European Union. It was also the leading exporter of organic bananas to the EU.

- In Turkey, organic farming started with the impetus from Europe in the 1980s and production is still mainly dedicated to export (80%)[2]. Its organic exports are estimated at around € 400 million. The European Union (especially Germany and France) and Switzerland are the main destinations for Turkish organic products, ahead of the United States. Turkey mainly exports fruits (dried, fresh and nuts), legumes and cotton.

- Mexican organic exports were valued at € 373 million in 2013. The United States and Canada are important destinations for Mexican organic products.

- In Peru, organic exports amounted to € 339 million in 2018. The main Peruvian organic products exported are coffee, bananas, cocoa, quinoa and mango.

1- Volume classification
2- However, local production does not fully meet domestic demand.

ORGANIC SECTOR IN THE WORLD

■ Argentina's organic exports amounted to around € 262 million in 2018, which represented a volume of 166,000 tons (97% of national organic production). The main destinations for Argentinian organic products are the USA (44% by volume in 2019) and the European Union (41%). Germany is its main EU customer. The main organic products exported by Argentina are pears, wheat, cane sugar, apples, soybeans, cider, wine, applesauce, rice and honey. Argentina is the biggest exporter of organic apples and pears to the European Union. Argentina is trying to expand its organic exports to China[1], but it does not have an equivalency agreement with China. Argentina's organic honey is mainly exported to the European Union.

■ Sri Lanka exported € 259 million of organic products in 2015. It mainly exports tea[2], cane sugar, spices, ppam, nuts, fresh and processed fruits and cereals. The main destinations for Sri Lankan organic products are Europe, the United States, Japan and Australia. Sri Lanka exports most of its organic production.

■ Chilean organic exports amounted to € 254 million in 2018. These are mainly fresh and processed fruits and vegetables (primarily blueberries[3]), olive oil, wine and honey. Chile exports around 95% of its organic production. The main destinations for Chilean organic products are the United States, the European Union, Canada and Asia.

■ New Zealand exported € 224 million of organic products in 2017 (+42% vs 2015). More than half of New Zealand's organic exports go to Europe and North America. New Zealand also exports a lot of organic products to Australia. The main organic products exported are fruits and vegetables (nearly € 81 million in 2017). In 2017, they represented 38% of organic exports and 4.7% of fruit and vegetable exports. These are mainly kiwis and apples. Like Australia, New Zealand exports dairy products to Asia, especially China.

■ Tunisian organic exports approached € 201 million in 2018. Most of Tunisian organic production is sold abroad. Tunisia has become the leading exporter of organic products from Africa. The volume of Tunisian organic exports more than tripled between 2011 and 2018. Olive oil is the main organic product exported. It represented 80% of exports by value in 2018. Dates followed with 19% of exports. Tunisia also exports other fruits, vegetables and some aromatic plants, but this only represents 1% of its organic exports. France, Italy, the United States and Spain are the main destinations for Tunisian organic products.

■ Romania exports a large part of its organic production. Its main markets are Austria, the United States, Japan, Germany, France, Italy and Denmark.

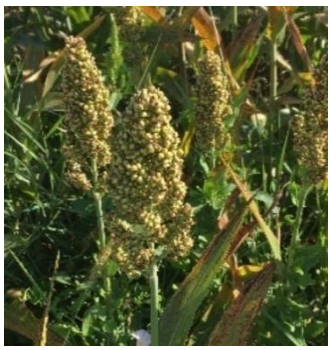
■ British organic exports amounted to € 194 million in 2016. The United Kingdom exports in particular organic milk and salmon. EU countries are the main destinations for British organic exports.

1- 17 tons of Argentinian organic products were shipped to China in 2018, mainly chia seeds.
2- This was the first organic product exported by Sri Lanka.
3- Chile also exports organic apples, avocados, table grapes, kiwis, plums, several species of berries and cherries.

ORGANIC SECTOR IN THE WORLD

- Ukrainian organic production is export oriented. Between 80 and 90% of organic farmers export. In 2019, Ukrainian organic exports amounted to € 189 million. Ukraine exports a lot of organic cereals and oilseeds, but also fruits, mushrooms and aromatic plants. Europe is an important market for Ukraine (notably the Netherlands, Germany and the United Kingdom). In 2019, Ukraine became the second largest exporter of organic products to the EU. It also exports organic products to North America, Australia and Asia. Every year, the share of the United States, the countries of the Persian Gulf, Japan and China increases.

- Ethiopia exported € 181 million of organic products in 2015. It mainly exports organic coffee.



- Bolivia exported € 179 million of organic products in 2011. It exports especially organic quinoa. France is the main buyer of Bolivian organic quinoa.

- In Brazil, organic exports amounted to over € 169 million in 2019. Sugar is probably the main Brazilian organic product exported.

- Sweden exported € 117 million of organic products in 2018.

- Malagasy organic exports approached € 98 million in 2019 (compared to € 17 million in 2012). The organic volumes exported have more than multiplied by seven between 2009 and 2019. The main organic products exported are cocoa and its derivatives, spices, fruits and vegetables and shrimps.

- Austria exports organic dairy products in particular to its neighbor, Germany. In 2011, Austrian organic exports amounted to € 80 million.

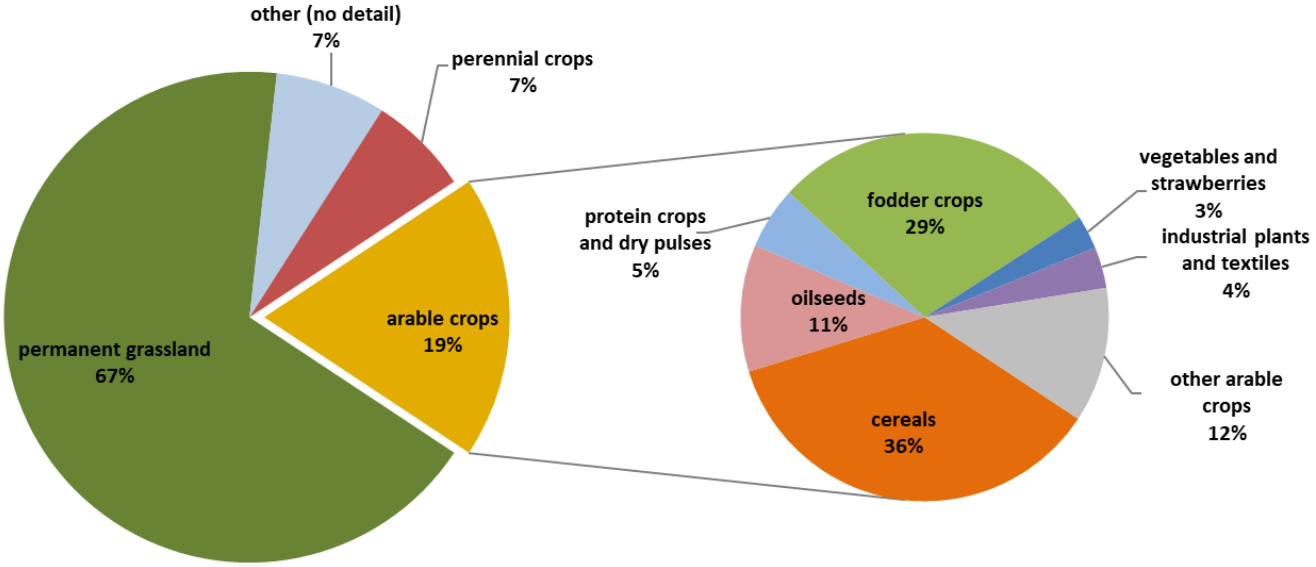
- Paraguay's organic exports amounted to € 77.7 million in 2019. According to estimates, they will increase in 2020. The USA is the first destination for organic products from Paraguay (nearly 47% in value in 2019), ahead of the European Union (33.8%). Germany and Sweden are the main EU destinations. Sugar represented 53% of Paraguay's organic exports in 2019, ahead of chia seeds (31%).

- Vietnam exported 77 million organic products in 2016. It exports organic shrimp.

Focus on organic crops

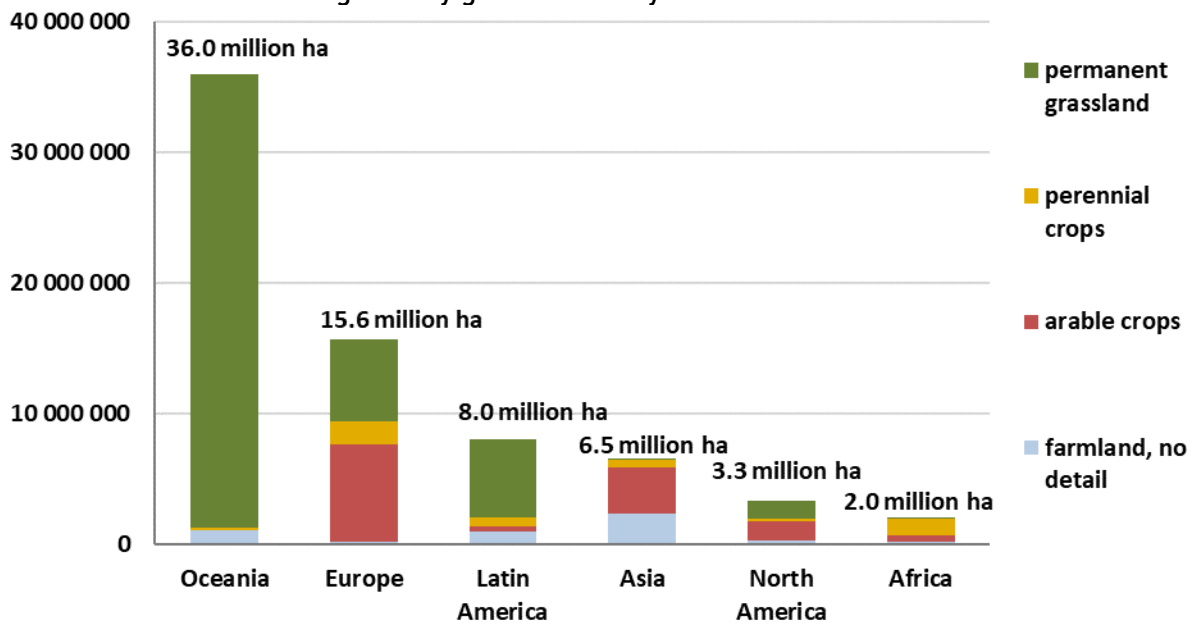
Distribution of global organically grown areas: More than two thirds with permanent grassland

Breakdown of organically grown areas in the world in 2018



Source: FIBL/IFOAM

Organically grown areas by continent in 2018



Source : FIBL/IFOAM

- Between 2004 and 2018, permanent grasslands more than doubled. Their growth accelerated in 2013. Between 2017 and 2018, they grew by 2.9%.

- In Oceania, permanent grasslands represent most of the area (96% in 2018). They are also important in Latin America (74%), North America (41%) and Europe (40%).

- In Africa, perennial crops represent nearly two-thirds of land (63% in 2018). Coffee and olives are the main organic perennial crops on this continent.

- A significant part of the area is dedicated to arable crops in Asia (53% in 2018), Europe (48%) and North America (44%). It is mainly cereals.

- Detailed data on organic areas are only partially available for India and Brazil.

Focus on arable crops: 18.6% of global organically grown areas

- In 2018, more than 13.3 million hectares of arable crops were grown organically (+4.9% vs 2017). 0.9% of global areas dedicated to arable crops were grown organically in 2018.

- In 2018, Europe had a predominant place in organic arable crops worldwide, with:
  - 55% of recorded cereal areas grown organically (46% in the European Union),
  - 33% of recorded oilseeds areas grown organically (21% in the EU).

- Asia came in second place in 2018.

Cereals: main organic arable crops

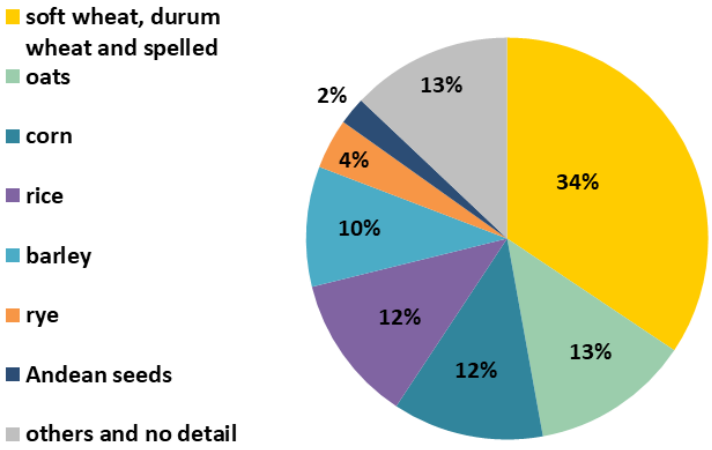
- Cereals[1] are the main organic arable crops (4.8 million ha in 2018), followed by fodder crops (nearly 3.9 million ha) and oilseed crops (nearly 1.5 million ha), ahead of protein crops and pulses (nearly 727,000 ha) and textile crops (nearly 469,000 ha).

- Nearly 4.8 million hectares of organically grown cereals were recorded in 2018 (+9% vs 2017), of which around 16% were in conversion. This represented 0.7% of the world cereal area[2]. The global area dedicated to organic cereals is underestimated because the Indian area is not known[3] and the Russian statistics are partial.

55% of the areas of organically grown cereals recorded in 2018 were in Europe, 27% in Asia and 13% in North America. The world's main producers of organic cereals were China (968,000 ha), France (360,119 ha), Italy (326,083 ha) and Canada (319,148 ha). In 2018, the organic share of cereal areas was still quite low in China (0.9%) and Canada (2.3%), while it was 10.4% in Italy and 4.0%. in France. The countries that had the largest share of their cereal area grown organically in 2018 were Austria (15.8%), Estonia (13.8%) and Sweden (12.3%).

1- Quinoa and amaranth, which are not cereals but Chenopodiaceae, are still included in this category because they are grown for their seeds.
2- In 2018: 2.0% in Europe (3.9% in the European Union), but only 0.3% in Latin America.
3- In 2018, India was the third largest producer of conventional cereals behind China and the United States.

Nearly 4.8 million ha of organically grown cereals worldwide in 2018



Source: FIBL/IFOAM

■ Three cereals, soft wheat, durum wheat and spelled represented 34% of the global area dedicated to cereals grown organically in 2018, ahead of oats (13%), corn (12%) and rice (12%). Over 195,000 ha of wheat and spelled were grown organically in Italy in 2018 and 174,000 in China. Wheat was the main organically grown cereal in North America (over 286,000 ha in total in 2018). Less than 1% of China's wheat area was grown organically in 2017. In North America, the organic share was 1.2% in 2018.
China was the first producer of organic corn in 2017.

■ The production of organic rice is developing. Asia was the main area of organic rice production in 2018 with 91% of the world areas. In 2018, rice represented 41% of the area of cereals grown organically in Asia. China was the world's largest producer[1] of organic rice in 2018 (322,000 ha i.e., 64% of organic rice areas in Asia). Organic rice is also grown in many other Asian countries, foremost among which are Indonesia, Thailand and Pakistan. Rice is one of India's main organic crops. It is one of the main organic products exported by Asia. In Europe, organic rice production is mainly located in Italy (17,832 ha in 2018). Organic rice crops also exist in other continents. Brazil is the main producer of organic rice in Latin America[2].

In 2018, nearly 106,000 ha of Andean seeds were grown organically worldwide, almost all of which in Latin America. Bolivia was the first producer with 83% of the world areas, ahead of Peru (11%). In 2018, 79% of Bolivian Andean seed areas were grown organically, while the organic share was 19% in Peru. These are mainly quinoa and amaranth. Over 92,000 ha of quinoa were grown organically in Latin America in 2018 (53% of the areas of quinoa in Latin America).

1- It was also the first producer of conventional rice.
2- Over 27,000 tons per year.

In 2019, the European Union imported 507,600 tons of organic cereals, 40% of which was wheat. Imports of organic cereals fell by 29% compared to 2018, mainly due to a drop in those of rice. 53% of EU organic cereal imports came from Ukraine in 2019 (31% for wheat). In 2019, 36% of organic rice imported into the EU came from Pakistan. Switzerland imported 66,700 tons of organic cereals in 2019.

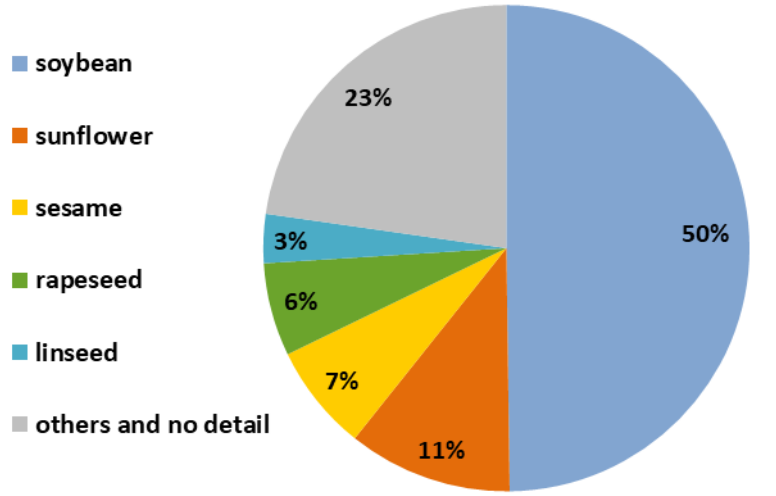
Organic oilseeds: 0.6% of global oilseed areas[1]

Nearly 1.5 million ha of organically grown oilseeds were recorded in 2018 (+5% vs 2017), of which around 11% were in conversion. These areas are underestimated due to the lack of statistics for Brazil, a major producer of conventional oilseeds. In 2018, 43% of organically grown oilseed areas recorded were in Asia, 33% in Europe, 13% in Africa and 8% in North America. The main organic oilseed producing countries were China (478,000 ha), India (130,000 ha) and Russia (114,882 ha).
In Asia, only 1.2% of oilseed areas were grown organically in 2018 (2.4% in China and 0.5% in India). In 2018, the countries that had the largest share of their oilseed areas grown organically were Togo (51.4%)[2], Peru (22.4%) and Austria (19.7%). This is mainly sesame for Peru and soybean for Austria.

Soybean was the main oilseed species grown organically in 2018[3] with over 739,000 ha, i.e., 50% of the world's oilseed areas grown organically. Organic soybean areas increased by 10% in 2018 compared to 2017. However, only 0.6% of the global soybean area was grown organically in 2018. China is the leading producer with 40% of the global area in 2018, ahead of India (18% of areas), Russia (10%) and the United States (7%). The share of national land grown organically was still low in these four countries in 2018: China: 4.0%, India: 1.2%, Russia: 2.9% and the United States: 0.1%.
The market for organic soybean products is growing rapidly. Europe is the biggest market for these products. Unlike the conventional sector, most organic soybean volumes are used for human consumption.
Sunflowers were the second most organically grown species in 2018, with over 162,000 ha (+7% vs 2017). This represented only 0.6% of the global sunflower area. In 2018, Romania was the main organic sunflower grower (nearly 36,900 ha), ahead of France (nearly 30,500 ha) and Russia (over 25,200 ha). In 2018, the organic share was 3.4% in Romania, 5.7% in France and only 0.3% in Russia.
Sesame came in 3rd place with over 105,400 ha. In 2018, Romania was the world's leading organic oilseed rape grower with nearly 22,000 ha and Canada the leading organic flax grower with more than 24,800 ha.

1- In 2018, the share was 2.5% in the European Union.
2- In 2018, the share was 0.7% for Africa.
3- It is the main conventional oilseed crop worldwide.

Nearly 1.5 million ha of organic oilseeds worldwide in 2018



Source: FIBL/IFOAM

In 2019, the EU imported more than 385,900 tons of organic oilcakes (+13% vs 2018), nearly 132,100 tons of soybeans (+24.8%) and over 160,100 tons of other oilseeds (- 16.8%). 82% of the oilcakes came from China. 32% of the soybeans originated from Togo and 21% from China. Almost 24% of other oilseeds came from Turkey and 18% from Ukraine.

Organic protein crops and pulses: mainly grown in Asia and Europe

Nearly 1.8 million ha of organically grown protein crops and pulses were recorded in 2018. Global areas are underestimated due to the lack of statistics on organic areas for three major conventional protein crop producers: India, Niger and Burma.
In 2018, nearly 2/3 of the areas of protein crops and pulses grown organically recorded were in Asia and 28% in Europe.
In 2018, the countries which had the largest share of their protein crops and pulses grown organically were Austria (65.2%) and Greece (63.0%).

Organic cotton: an increase in production in 2018/2019

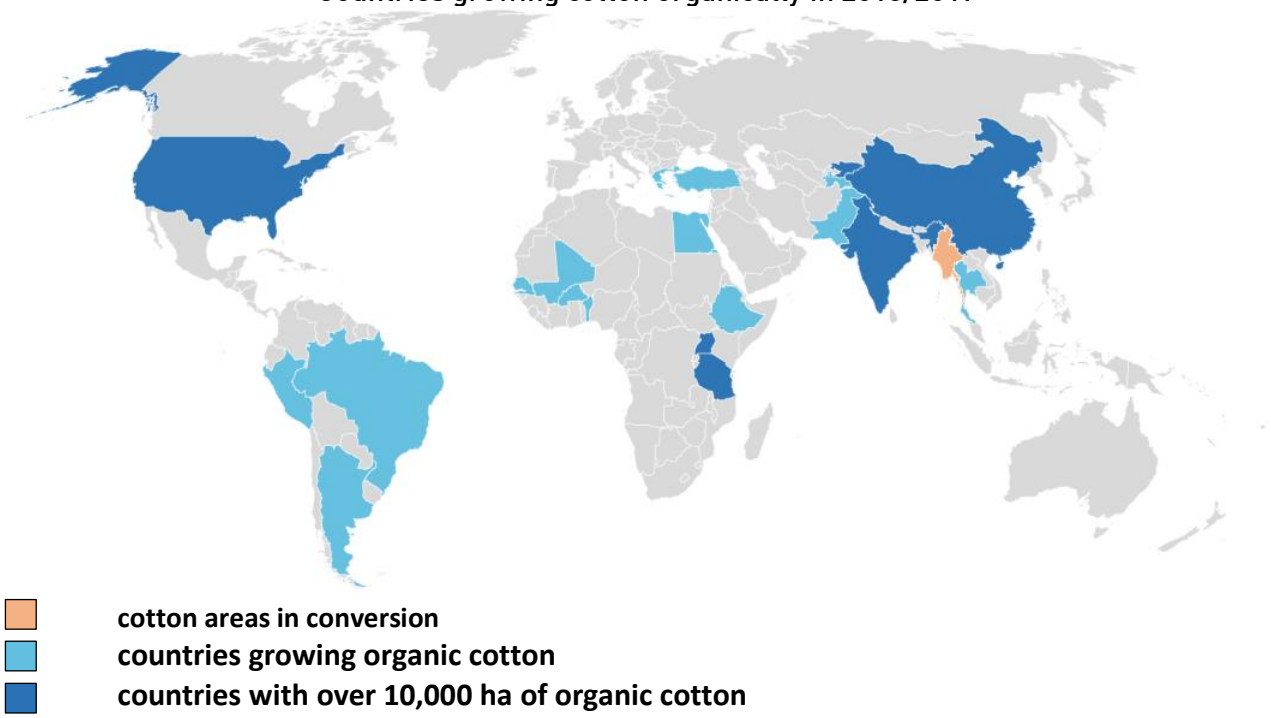
Cotton began to be certified organic in 1992. In 2018/2019[1], 418,395 ha of certified organic cotton were grown by more than 222,000 organic farmers. This represented a little over 1% of the world cotton area. Moreover 55,833 ha were in conversion in 2018/2019.
After increasing by 56% in 2018/2019, organic cotton fiber production grew by 31% in 2018/2019, reaching 231,787 tons (0.9% of world production).
India is the country that contributed the most to growth in 2018/2019. It was also the country with the largest areas under conversion. According to *Textile Exchange* estimates, global organic cotton production must have increased by 10% in 2019/2020.
According to *Textile Exchange*, farmers' access to cotton seeds that have not been genetically modified remains a huge barrier for organic farmers, especially in countries like China and India where GM cotton dominates the cotton landscape[2].

1- The cotton production campaign begins on August the 1st (definition by the International Cotton Advising Council).
2- In 2017, 80% of the world's cotton production was genetically modified. In India, China and the United States, this share was 95 to 96%. In contrast, GMOs were banned in Turkey.

ORGANIC SECTOR IN THE WORLD

In 2018/2019, nineteen countries were producing organic cotton and one in conversion, but seven of them accounted for 97% of production: India (51%), China (17%), Kyrgyzstan (10%), Turkey (10%), Tajikistan (5%), Tanzania (2%) and the United States (2%).
Uzbekistan has recently started growing organic cotton with the support of GIZ.

Countries growing cotton organically in 2018/2019



Source: Agence BIO/Textile Exchange/FIBL/IFOAM

■ The organic share in national cotton production was still low in 2018/2019 in many countries. This was the case especially in India (2.3%), China (0.7%) and Turkey (2.3%).
The organic cotton production is sometimes very concentrated in one part of the country. Thus, in 2018/2019, 29% of India's organic cotton production came from Odisha and 23% from Madhya Pradesh. 96% of American production came from Texas in 2017/2018. 99% of Chinese organic cotton was produced in Xinjiang in 2018/2019. All of Kyrgyzstan's organic cotton production took place in the Osh and Jalal-Abad regions in 2018/2019. There is a pilot project to develop organic cotton production in Haiti[1].
More and more Turkish companies are producing large volumes of organic cotton in Kyrgyzstan and Tajikistan, almost all of which is brought to Turkey for processing after ginning.

■ Organic cotton began to be marketed at the end of the 1980s. Currently, more and more clothing brands are using organic cotton. Demand for organic cotton therefore continues to outstrip supply. The world cotton market was estimated at € 14.5 billion in 2015 (almost stable vs 2014). 81% of companies using organic cotton are in the clothing sector, 14% produce interior textiles and 5% produce shoes. Two major companies in the textile industry have committed to using only organic cotton by 2020.

1- The project is led by the Smallholder Farmers Alliance with support from the Impact Farming Foundation and in partnership with Timberland.

In 2019, organic still only represented 1% of the cotton market.
The manufacture of organic cotton clothing is developing in Peru.
Exports reached 626 million € in 2012, they have multiplied by twelve in ten years.
In the USA, the market for organic fiber-based products represented nearly € 1.6 billion in 2018 (+15% vs 2017).
In the United Kingdom, the organic textiles market amounted to € 46.2 million in 2018 (+18% vs 2017 and more than tripling vs 2010). A 2018 *Fashion Revolution* poll found that 37% of consumers say they consider environmental impacts when purchasing clothing and 85% of people consider it important for fashion retailers to reduce their impact on climate change[1].
Retailer goals and commitments are evolving to reflect this. By 2019, 39 companies had joined the *Sustainable Cotton Challenge*, an initiative led by the *Soil Association* and managed by *Textile Exchange*, for which retailers pledge to use 100% sustainable cotton by 2025. Several UK clothing brands are even committed to use only organic cotton soon[2].
A significant share of fair-trade cotton products is also certified organic.

Organic sugar: production mainly from sugar cane

■ 94,811 ha of sugar cane were grown organically in 2018, i.e., 0.4% of the global sugar cane area. The areas increased by 6% compared to 2017.
World production of organic cane sugar was estimated at 4.9 million tons for 2016, i.e., 0.3% of global production.

■ About 90% of organic cane sugar production is sold as organic. In 2018, 83% of sugar cane areas grown organically were in Latin America. The organic share of Latin American sugar cane areas was still only 0.6% in 2018. Paraguay (33,842 ha), Argentina (18,639 ha) and Brazil[3] (11,400 ha) are the main producers of organic sugar worldwide. In Argentina, organic sugar cane is mainly grown in the provinces of Jujuy and Salta, in the north-west of the country. In Paraguay, 28.7% of the sugar cane area was grown organically in 2018. In Argentina and Brazil, the share was much lower, respectively: 4.9% and 0.1%. Sugar is the main organic product exported by Paraguay (62,910 tons in 2019). Production of organic cane sugar is expanding in other countries, such as Costa Rica, which was already exporting organic sugar to 17 countries in 2020.

10% of organic sugar cane areas were in Africa in 2018. Mozambique grew over 9,700 ha of organic sugar cane in 2018, i.e., 22.4% of its areas of this crop. There are two organic sugar production factories in Mozambique, one of which was established in 2020.
7% of organically grown sugar cane areas were in Asia in 2018. Thailand was the main organic sugar cane grower in Asia in 2018.

1- 2018 study polling UK, German, French, Italian and Spanish consumers.
2- e.g.: Stella McCartney and Superdry
3- Brazil is the leading producer of conventional cane sugar.

■ 10,900 ha[1] of organically grown sugar beets were recorded worldwide in 2018, 76% of which were in Europe. Germany and Egypt were the main growers of organic sugar beets with over 3,600 ha and over 2,200 ha, respectively. However, the share of sugar beet areas grown organically was still low in these 2 countries in 2018: Germany: 1.2% and Egypt: nearly 1%.

■ North America is the first market for organic sugar, ahead of Europe, Asia and Brazil. In 2016, the United States imported € 45.5 million of organic sugar.
In 2019, the EU imported nearly 213,800 tons of organic cane and beet sugar (+29% vs 2018) and nearly 43,200 tons of other sugar (+9.6%). Brazil was the largest supplier of sugar[2] (27% of EU imports), ahead of Colombia and India (18% each).
Argentina's organic cane sugar is mainly exported to the European Union and the United States.
In 2019, Switzerland imported 60,200 tons of organic sugar beet and nearly 4,700 tons of organic sugar.

Organic vegetables and strawberries

■ 387,352 ha of organically grown vegetables (excluding strawberries) were recorded in 2018 (+3% vs 2017), i.e., 0.6% of global vegetable areas[3]. However, the areas are underestimated because there are no data available for India, a major conventional producer.
In 2018, 48% of organic vegetable areas were in Europe, 19% in North America and 14% in Asia.
In 2018, the main producers were the United States (17%), Italy (16%) and China (11%). The organic share of vegetables area was 12.1% in Italy and 7.8% in the USA, while it was only 0.2% in China. Luxembourg and Denmark stood out with shares of 54.1% and 34.6%.
In 2018, fruit-vegetables represented more than a fifth of the vegetable area grown organically.

■ 7,507 ha of strawberries were grown organically in the world in 2018 (-11% vs 2017), i.e., 1.9% of the global strawberry area. The USA was the main cultivator in 2018 with over 2,500 ha of strawberries grown organically, i.e., nearly 12% of the country's strawberry areas.

■ The European Union imported nearly 159,200 tons of fresh and processed organic vegetables in 2019 (+8% vs 2018). Egypt was the leading exporter of organic vegetables to the EU (26%), ahead of Israel (21%).

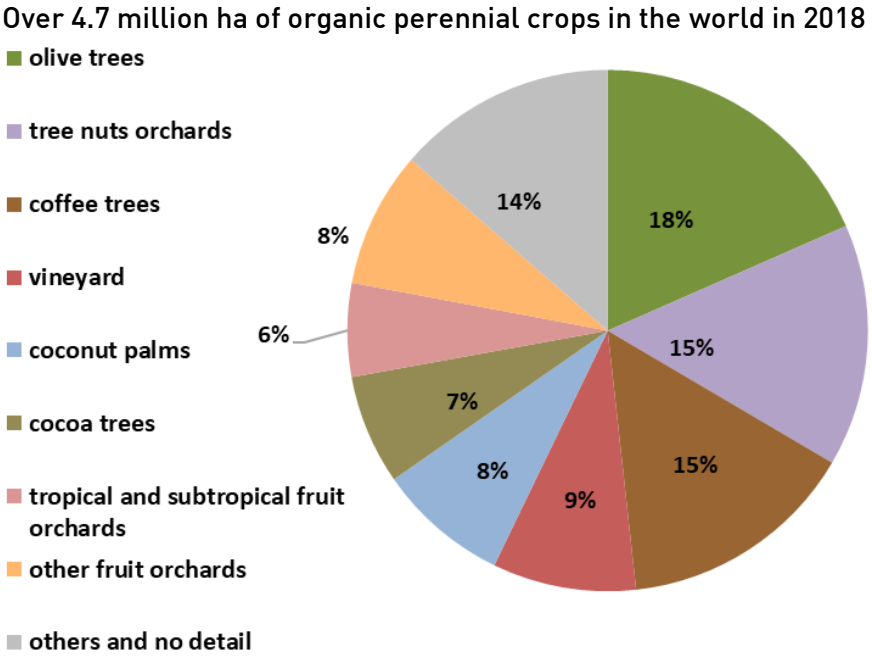
1- Global areas are probably underestimated because Chinese areas are not known for 2018.
2- This concerns the total imports of cane and beet sugar.
3- 7,2% in the European Union.

Focus on perennial crops: 7% of global areas grown organically

- Perennial crops grown organically covered over 4.7 million hectares in 2018 (-2.9% vs 2017[1]). 2.8% of the world's perennial crops were grown organically in 2018.

- They were mainly in Europe, Africa and Latin America. They represented 7% of organic land in 2018, while this share amounted to around 3% in the entire agricultural territory.

- In 2018, olives area represented 18% of perennial crops grown organically.



Source: FIBL/IFOAM

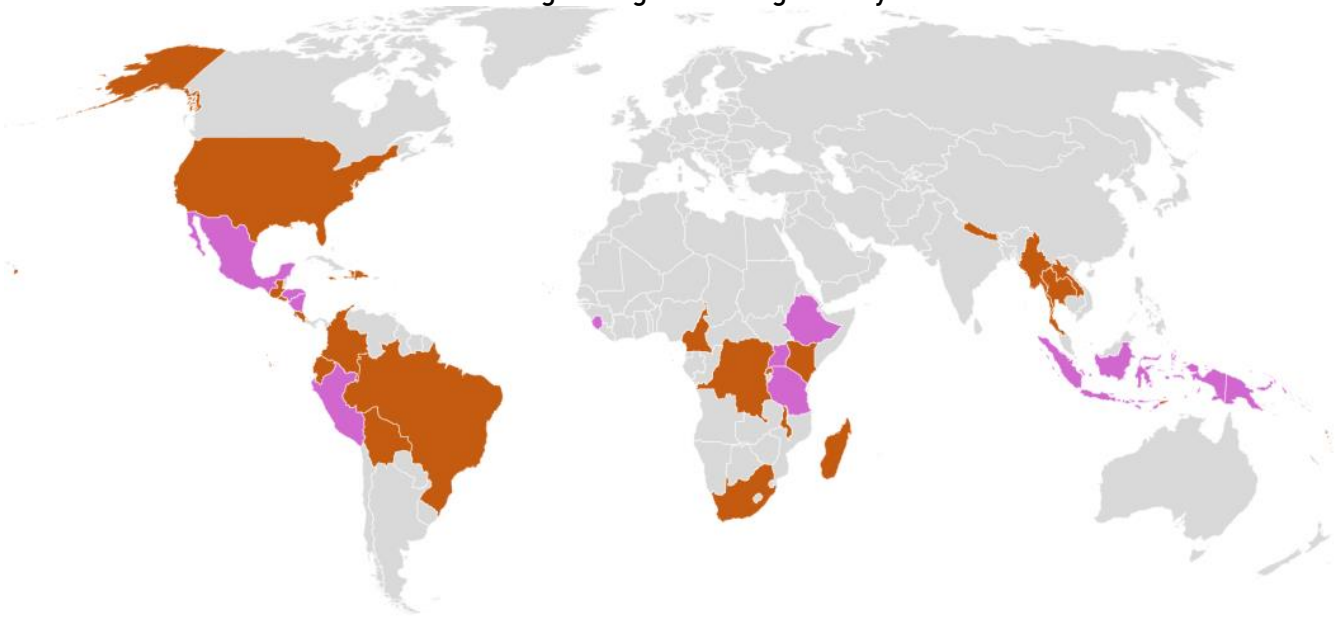
Organic coffee: Over half of the area in Africa

- Certification of organic coffee began at the end of the 1960s. 700,850 ha of organically grown coffee trees were recorded in 2018 (-21% vs 2017). These areas are underestimated because statistics for Ivory Coast are not available. 6.5% of the world area of coffee trees was grown organically in 2018. The share was 5% in Latin America.

- 52% of the recorded organic coffee areas were in Africa in 2018, 35% in Latin America[2] and 10% in Asia.

1- This decline is mainly due to the decline in coffee crops and tropical and subtropical organic crops in Mexico.
2- In 2018, coffee represented more than a third of Latin American areas grown organically dedicated to perennial crops.

Countries growing coffee organically



Countries growing coffee organically
Countries with over 20,000 ha of coffee grown organically

Source: Agence BIO/FIBL/IFOAM

■ The main organic coffee producing countries were Ethiopia[1] (23% of global areas in 2018), Peru (17%), Tanzania (nearly 12%), Uganda (9%), Indonesia (almost 9%) and Mexico (6%).

In Ethiopia, over 161,100 ha of coffee fields were grown organically in 2018, i.e., 23.2% of the national coffee areas. The Ethiopian government is strongly encouraging the sector to adopt more sustainable cultivation techniques such as organic farming and to focus on producing high quality Arabica. Coffee is Ethiopian main crop for export.

In Peru, nearly 121,100 ha were used for organic coffee in 2018, i.e., 28.6% of the national land for this crop. The production of organic coffee is actively encouraged by local government agencies and NGOs, mainly to increase the income of farmers. Export promotion is carried out by the Peruvian agency *PromPeru*. Peru is probably the world's largest exporter of organic coffee.

In Tanzania, organic coffee was grown on nearly 81,800 ha (43.6% of national coffee area).

Nearly 65,600 ha of coffee fields were grown organically in Uganda (share of 17%). For several years, the national policy has favored the production of organic coffee. The production of coffee both certified organic and fair-trade is growing in Uganda. In 2018, 114,000 tons of unroasted coffee certified to both standards were sold. Coffee is the main product exported by Uganda. This country exports more Robusta coffee than Arabica.

In Indonesia, just over 650,000 ha were dedicated to growing organic coffee. This still only represented 4.8% of Indonesia's coffee area. There are 25 certified fair trade coffee cooperatives in Indonesia and most of them are also certified organic.

In Mexico, over 44,200 ha were dedicated to organic coffee, i.e., 6.9% of the national coffee area. Most of the coffee exported was Arabica. The coffee orange rust outbreak has severely affected national coffee production, mainly organic production. To remedy this, the

1- Ranking of coffee producing countries in 2018: 1) Brazil, 2) Vietnam, 3) Indonesia, 4) Colombia, 5) Ethiopia, 6) Honduras, 7) Peru, 8) India, 9) Guatemala, 10) Uganda and 11) Mexico.

government has promoted several state initiatives to support the renewal of production such as the introduction of pest resistant varieties, training, as well as value-added initiatives such as the production of certified coffees, among which organic coffees.

■ In Honduras, the introduction of more disease resistant varieties after a severe coffee rust epidemic has resulted in increased production volumes. The organic share of coffee areas was still only 4.7% in 2018. The Honduran Coffee Institute encourages the production of value-added coffee, either through certification or by actively improving the quality of coffee.

■ Brazil and Colombia, which are major producers of conventional coffee, still only grow a small share of their land organically (0.03% and 1.3% respectively). There are, however, initiatives to stimulate organic coffee production in Brazil, such as that of the Brazilian Organic Coffee Association or that of the state government of Minas Gerais[1] which offers technical assistance to facilitate organic conversion.
In Colombia, there are also some initiatives to develop organic coffee production.

■ Two countries stood out for the share of their area of coffee trees grown organically in 2018: Bolivia with 47.5% and Papua New Guinea with 44.6%.

■ The global organic coffee market was estimated at $ 6.8 billion in 2018[2] and could reach $ 12.6 billion by 2026. Arabica accounted for 3/5 of the global organic coffee market in 2018. In general, organic coffee is imported through circuits like those of conventional coffee. The main markets for organic coffee are the United States, Europe[3] and Japan.
In 2018, it was estimated that 23% of fair-trade certified coffee was also organic. This double certification is increasingly appreciated in the coffee market.

■ In 2018, the United States represented nearly 2/5 of the global organic coffee market. Coffee is the main organic product imported into the United States. Much of this is unroasted coffee. The main country of origin is Peru. In 2016, 6% of United States coffee imports by value were organic, i.e., € 313 million (part of it is exported after roasting and packaging).

■ The EU imported 130,000 tons of organic unroasted coffee in 2019 (+11.6% vs 2018), i.e., 3.5% of its overall imports of unroasted coffee. It also imported some organic coffee that was already roasted. In 2019, the main suppliers of organic unroasted coffee were Peru (32% of imported volumes), Honduras (26%) and Mexico (7%).
In the European market, organic coffees are found in all price segments and are mainly sold in supermarkets. European supermarkets are developing more and more organic coffees under private labels.

1 This state is in the north of the Sudeste region and gathers more than 10% of the Brazilian population.
2- Compared to $ 2.2 billion in 2008.
3- Europe is the world's largest market for coffee.

Germany[1] is the second largest importer of organic coffee globally and the first at European level[2] (ahead of Belgium and Sweden). A significant part of the organic coffee imported by Germany is exported to other EU countries, but it is still the largest market for organic coffee in the EU. In 2019, organic coffee sales in Germany increased by 14% in volume, which is significantly higher than the growth in conventional coffee sales. Organic represented 4.3% of coffee sales by value in 2019. Around 26% of German consumers say they prefer organic coffee to conventional coffee and 78% are willing to spend more on organic coffee than conventional. In 2018, 75% by volume of fair-trade coffee sold in Germany was also organic (compared to 66% in 2014). In 2019, Honduras was Germany's largest supplier of organic coffee.
In Sweden, the organic coffee market already reached € 70 million in 2017. The large Swedish roaster *Löfbergs* is one of the world's largest importers of organic and Fairtrade certified coffee. In 2018, the organic coffee market share was 8.8% in value.
France have imported around 5,500 tons of unroasted organic coffee in 2018. Around 16% of French households bought organic coffee in 2018. Organic coffee represents around 3% of coffee sales.
Italy imported around 5,000 tons of organic unroasted coffee in 2018, however this only represented 0.8% of its coffee imports. Honduras is Italy's leading supplier of organic coffee.
In Denmark, the organic coffee market amounted to € 41 million in 2019 (+2.3% vs 2018) for 2,565 tons.

- In Switzerland, organic coffee sales were still relatively modest in 2017: € 28.2 million. 1,900 tons of coffee, certified both organic and fair, were sold in Switzerland in 2018 (39% of fair-trade coffee).
The UK is a major market for organic coffee. A significant share of the coffee sold in this country is certified organic.

- In Japan, consumer interest in organic coffee is growing.

- Sales of organic coffee have grown significantly in Australia in recent years[3] as Australian consumers increasingly demand high-quality, ethically and sustainably produced coffee beans.

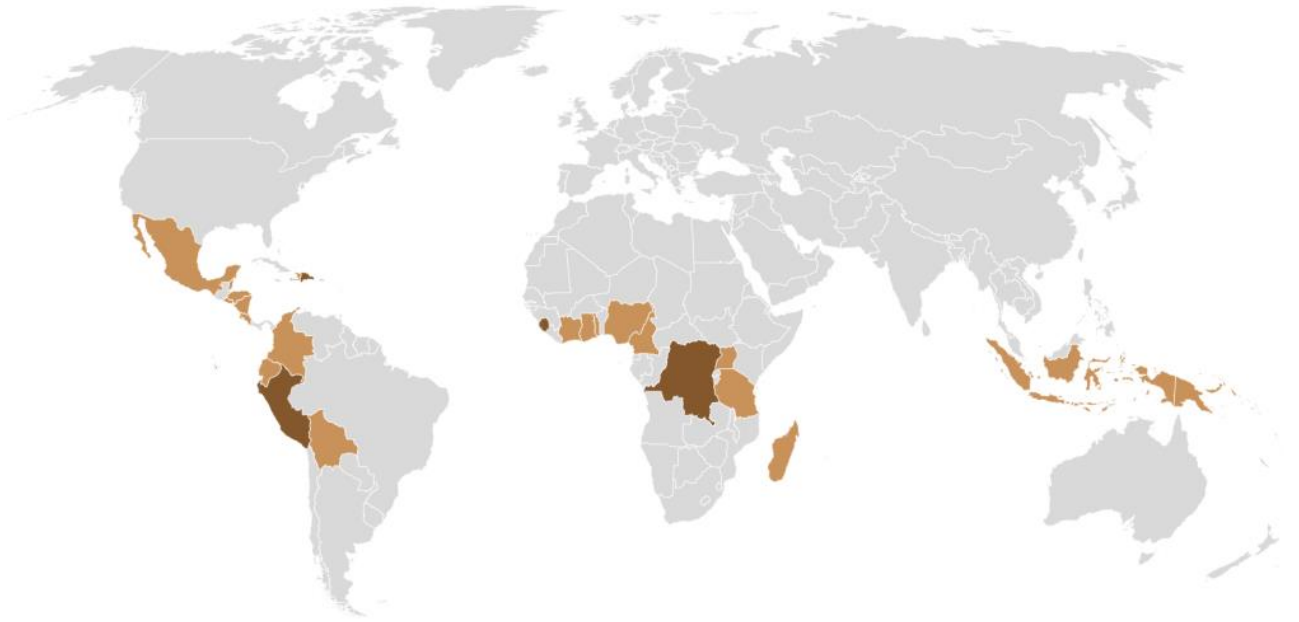
- It is now possible to find organic coffee on store shelves in Eastern Europe, Pacific countries, Latin America, the Middle East and South Africa.

Organic cocoa: 2.7% of global cocoa areas

- The recorded areas of organically grown cocoa trees amounted to 322,184 ha in 2018 (- 18% vs 2017).
World production of organic cocoa amounted to around 157,275 tons in 2016 (+1% vs 2015), i.e., 3.5% of world cocoa production.

1- Germany was the EU's largest importer of unroasted coffee in 2019 with 30% of volumes, ahead of Italy (16%) and Belgium (8%).
2- Hamburg is the world's leading coffee transit port. Germany is the 1st European market for conventional coffee.
3- Organic coffee represented 12.8% of coffee sales in Australia in 2016.

Countries growing cocoa organically



Countries growing cocoa organically

Country with over 20,000 ha of organically grown cocoa

Source: Agence BIO/FIBL/IFOAM

53% of the world's organic cocoa areas were in Africa in 2018. In recent years, organic cocoa areas have developed strongly in Africa, exceeding those in Latin America. 2.1% of African cocoa areas were grown organically in 2018. The main producers of organic cocoa in Africa were the Democratic Republic of Congo (16% of global areas in 2018[1]) and Sierra Leone (19%). The Ivory Coast[2] only started growing organic cocoa very recently: 0.03% of its cocoa areas were grown organically in 2018[3]. 29.8% of Malagasy cocoa areas were grown organically in 2018.

46% of the areas of cocoa grown organically were in Latin America in 2018. In Latin America, the organic share was 8.7% in 2018, with high shares in Dominican Republic (53.9%) and in Peru (25.5%).

Dominican Republic remained the first producing country at the world level (25% of the world area) and the first world exporter of organic cocoa. A significant share of organic cocoa from the Dominican Republic is also certified fair trade. Peru was the second largest producer of organic cocoa in Latin America with 11% of the world area in 2018. It exported € 45 million of organic cocoa in 2014.

The production and export of organic cocoa are developing rapidly in other Latin American countries. Cocoa produced in Latin America is generally processed in Europe, mainly in Switzerland. Nicaragua and Costa Rica have developed organic chocolate production for local markets. Consumption of organic chocolate is also growing in Mexico and Bolivia. 1.5% of Oceania's cocoa areas were grown organically in 2018. In Vanuatu, a small producer of organic cocoa, 44% of areas were grown organically in 2017 (compared to around 20% in

1- 3rd largest producer of organic cocoa.

2- Main producer of conventional cocoa

3- On the other hand, it has significant areas of cocoa intended for fair trade.

2010). Organic cocoa was also grown in Fiji. Organic cocoa cultivation was still very small in Asia in 2018 (0.02% of cocoa areas).

- In 2019, the EU imported nearly 66,000 tons of cocoa beans (- 11% vs 2018). The Dominican Republic remained the main supplier of organic cocoa beans to the EU in 2019 (36.9%), followed by Peru (19.6%), Sierra Leone (17.0%), the Democratic Republic of the Congo (8.6%) and Uganda (4.9%). The EU also imported over 2,000 tons of organic cocoa paste and powder in 2019 (+19% vs 2018).

- In 2019, Switzerland imported 6,429 tons of organic cocoa.

- Organic cocoa probably still represents less than 1% of the world cocoa market. According to experts, the organic market will develop with production.

- The first organic chocolate was sold in 1989. The global organic chocolate market was estimated at € 690 million in 2018 (compared to € 163 million in 2002). Europe is the first market for organic chocolate, ahead of North America. In the EU, the main markets are Germany[1], the United Kingdom, the Netherlands and France.
In 2016, 20% of fair-trade chocolate produced in the world was also certified organic.

Organic tea: a crop that started in the late 1970s.

- Organic tea is produced in Asia and Africa. Over 131,900 ha of organically grown tea were recorded in Asia in 2018 (+20% vs 2017), i.e., 3.7% of Asian tea areas.
With 111,000 ha in 2018, China was the world's largest producer of organic tea[2]. Its areas increased by 23% in 2018, but still only represented 5.0% of national tea area. In 2018, Chinese organic tea production amounted to 193,000 tons. China produces much more organic green tea than black tea. Yunnan[3] is by far the largest region in terms of organic tea production. Fujian, Hubei and Zhejiang provinces[4] also produce a lot of organic tea. They probably export a larger part of their organic tea than Yunnan. The United States, Germany and France remained the three main destinations for Chinese organic teas. Local consumers are not particularly interested in organic tea.
Vietnam was the world's second largest organic tea producer in 2018 with nearly 8,900 ha, i.e., 7.2% of the national tea area.

1- Germany is also the world's largest market for chocolate (11 kg/inhabitant year), ahead of Switzerland (9.7 kg) and Estonia (8.8 kg).

2- China is also the leading producer of conventional tea.

3- In Southwest China.

4- In Southeast China.

Myanmar was the world's third largest producer of organic tea in 2018 (nearly 7,700 ha). 8.6% of Myanmar's tea areas were grown organically in 2018.
1,200 ha of tea were grown organically in Sri Lanka in 2018, which still only represented 0.5% of the country's tea areas.
The areas grown organically in India are not known[1]. During the 2016/2017 campaign, India produced 39,129 tons of organic tea. This is black tea. The main region for organic tea production is Darjeeling, in West Bengal. About 70% of this region production is certified organic. Organic tea is also produced in other regions including Assam in Sikkim. A significant part of Indian organic tea is exported. Organic tea is still a niche market in this country, although it is gaining popularity with Indian consumers. The main destinations for Indian organic tea are the European Union (including Germany, France, Italy, the Netherlands and Belgium), the United Arab Emirates, Iran, Japan and Sri Lanka.
Nearly 1,100 ha of tea were grown organically in Japan in 2018, i.e., only 2.5% of the country's tea areas. It is mainly green tea (99% of production in 2017). In 2018, 6.3% of Japanese farms producing tea were certified organic. Kagoshima Prefecture[2] (especially around the city of Kirishima) is the main organic tea production region in Japan (41% of organic tea areas in 2019), ahead of Shizuok prefecture[3] (18%), Miyazaki prefecture[4] (11%) and the Uji region[5].
Japan produced 3,111 tons of organic tea in 2018. The organic production volume for 2020 is estimated at 8,000 tons (approximately 10% of the total Japanese tea production). Japan is exporting more and more organic green tea. Its main customers are the European Union (especially Germany, France and the Czech Republic) and the United States[6].
Domestic market for organic tea is growing relatively slowly. The taste of organic tea is not necessarily liked by the Japanese. However, Japanese consumers concerned about their health and the environment are interested in organic tea. Exports are growing more than national consumption. The Japanese government is encouraging farmers to increase the production of organic tea to increase exports.
Bangladesh was growing over 500 ha of tea organically in 2018. This tea is mainly intended for export to the United States, Japan, the United Kingdom and Germany.
Mozambique was the first African cultivator of organic tea in 2018 with nearly 1,800 ha grown organically, i.e., 5.8% of its tea areas. Rwanda came in second with over 800 ha (4.8% of Rwandan tea areas).
Uganda and Rwanda started to produce tea both certified organic and fair-trade.

■ The global organic tea market has been estimated at $ 850 million for 2019. It is expected to exceed $ 1 billion by 2023. North America is the first market for organic tea. In 2016, organic tea represented 18% by value of tea imports by the USA (nearly € 38 million). In 2016, 67% of organic green tea imported into the USA came from China, 49% from India, 19% from Sri Lanka and 17% from Japan.
In Europe, Germany seems to be the biggest consumer of organic tea. Sales were estimated at € 93 million in 2016. In 2016, 85% of fair-trade tea sold in Germany was also organic.

1- Asian areas are therefore underestimated.
2- At the southern end of the island of Kyūshū
3- On Honshū, the main island of Japan
4- On the island of Kyūshū
5- In Kyoto Prefecture, also on Honshū Island
6- If we consider all Japanese tea exports (organic and non-organic), the United States is the main destination, ahead of Taiwan and Germany.

Germany also processes some of the tea leaves that it imports to sale them to other European countries. The organic tea market share in British supermarkets was 8% in value in 2019. In Sweden, the organic tea market was valued at € 15 million in 2017. In Switzerland, the market was estimated at € 4,4 million in 2017. In 2017, Swiss sales of organic black tea rose by 5.9% and those of organic green tea by 4.8%.

Organic coconuts: 3.1% of global areas

- Coconuts were grown organically on 386,448 ha in 2018 (-3% vs 2017).

60% of the areas were in Asia, 33% in Oceania, 6% in Africa and 1% in Latin America.
The Philippines was the world's largest producer of organic coconuts in 2018 with nearly 160,000 ha, i.e., 41% of the global area. In Asia, the second largest producer of organic coconuts was Indonesia (over 42,600 ha in 2018). The share of coconut palm areas grown organically was still very low in Asia: 0.2% in 2018.
In Oceania, the main organic coconut producing countries were Samoa (nearly 97,700 ha), Papua New Guinea (12,300 ha), Fiji (9,000 ha) and the Solomon Islands (4,700 ha). It is mainly cultivated to produce coconut oil.
In Africa, Kenya was the main producer of organic coconuts (20,500 ha in 2018 i.e., 34.6% of national areas dedicated to coconuts).
The European Union imported over 74,000 tons of organic coconuts in 2018.

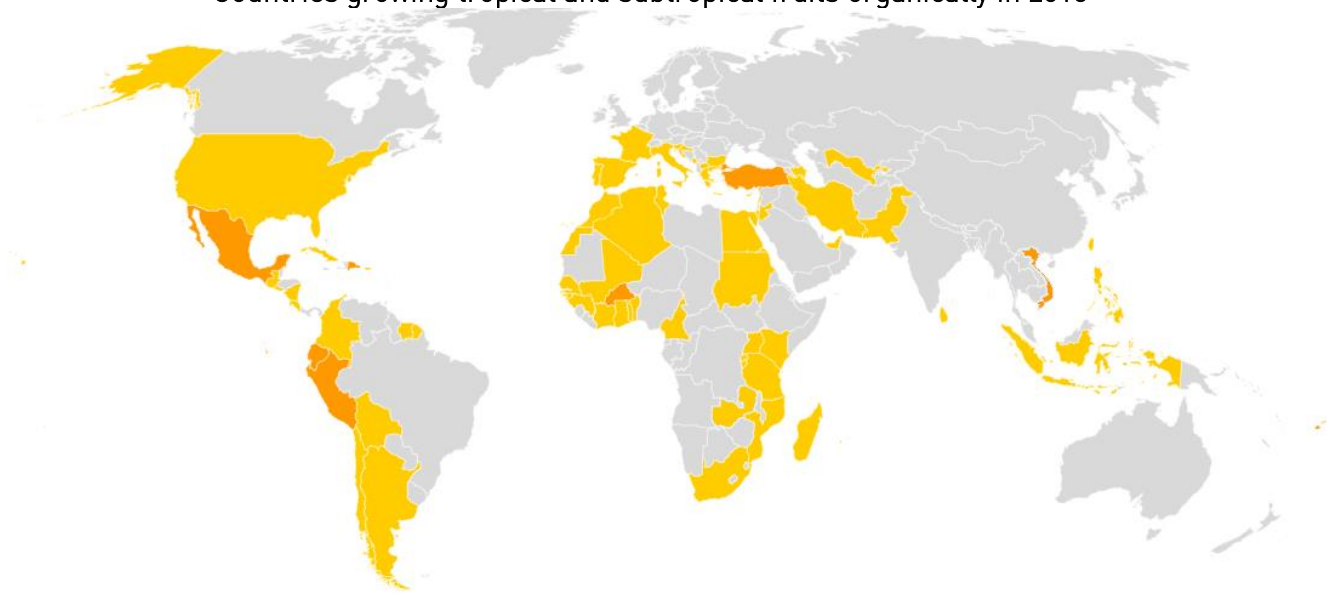
Organic tropical and subtropical fruits: mainly in Latin America

- 274,448 ha of tropical and subtropical fruits[1] grown organically were recorded in 2018 (-27% vs 2017), i.e., 1.1% of the global tropical and subtropical fruit areas. Areas are underestimated because organic areas are not known for three of the main producing countries of this kind of fruit: India, China and Brazil.

- 48% of the areas of tropical and subtropical fruits grown organically recorded were in Latin America in 2018, 18% in Africa, 13% in Europe, 13% in Asia and 7% in Oceania. The Dominican Republic was the leading producer of organic tropical and subtropical fruits in 2018 (83,507 ha, i.e., 30% of the global area), ahead of Fiji (20,370 ha), Turkey (19,797 ha) and Vietnam (19,023 ha).

1- Excluding coconut

Countries growing tropical and subtropical fruits organically in 2018



Countries growing tropical and subtropical fruits organically

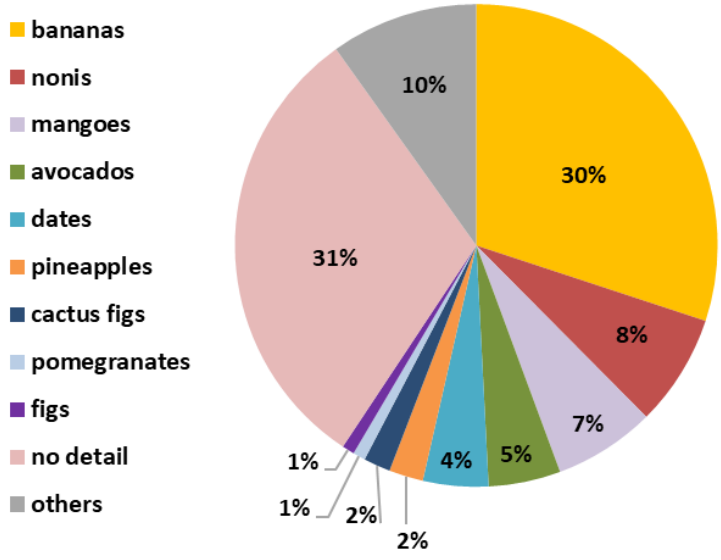
Country with over 10,000 ha of tropical and subtropical fruits grown organically

Source: Agence BIO/FIBL/IFOAM

■ In 2018, the share of tropical and subtropical fruit areas grown organically was particularly high in the Dominican Republic (76.8%), Burkina Faso (66.5%), Turkey (29.9%) and Slovenia (29.5%).

■ In 2018, the main tropical and subtropical fruits grown organically were bananas, nonis and mangoes.

Nearly 274,500 ha of tropical and subtropical fruits grown organically in 2018



Source : FIBL/IFOAM

■ Organic production of tropical and subtropical fruits is tending to diversify.
The production of tropical and subtropical fruits is still relatively underdeveloped in the French Overseas Departments.

- Bananas:

82,495 ha of banana plantations grown organically were recorded in 2018 (-7% vs 2017), i.e., 0.7% of global banana plantations.
In 2016, global organic banana production was estimated at 1.1 million tons, i.e., 1% of global banana production.
88% of organic banana plantations were in Latin America in 2018. 3.3% of Latin American bananas were grown organically in 2018. The main Latin American organic banana producing countries are the Dominican Republic, Ecuador[1] and Peru. In 2018, half of the world's organic banana areas were in the Dominican Republic. In 2018, 55.5% of Dominican banana plantations were grown organically. In Ecuador, the share was 5.6% and in Peru 6.1%.
Organic production requires a drier climate than that of conventional bananas and the climates of Ecuador, Peru and Mexico are therefore particularly suitable for growing organic bananas.
In 2018, 9% of organically grown banana plantations were in Africa. The share of African banana plantations grown organically was still very modest in 2018: 0.1%. Tanzania is Africa's largest producer of organic bananas with nearly 6% of the world's organic banana plantations in 2018. However, only 0.6% of Tanzanian banana plantations were grown organically in 2018. Other African countries also grow organic banana in 2018, first ranks of which Ghana, Uganda and Senegal. Ghana started producing organic bananas in 2014, but the share of Ghanaian organic areas was still very low in 2018 (0.3%). In Uganda, the share of organic banana plantations was still only 0.08% in 2018, while in Senegal, it approached 26%.

Organic bananas are also produced in other countries such as Spain (Canary Islands), Samoa and Papua New Guinea.
World exports of organic bananas were estimated at 800,000 tons for 2016. The Dominican Republic and Peru represent around 85% of the organic banana market. All Peruvian production is exported. Exports of organic Peruvian bananas grew strongly until 2018, approaching € 146 million (over 231,000 tons). As a result, Peru seems to have become the world's leading exporter of organic bananas in 2018, overtaking the Dominican Republic. Nonetheless, Peruvian organic exports then fell in 2019, reaching almost € 136 million (over 221,000 tons). In 2018, 70% of Peruvian organic bananas were sold in Europe. In 2019, the Dominican Republic was the leading exporter of organic bananas to the European Union. Ecuador comes in third place. In 2017, more than 7% of its exported banana volumes were organic.
The main markets for organic bananas are Europe, the USA and Asia. The European Union, North America and Japan accounted for 99% of organic banana imports in 2016. Bananas are the most imported organic fruit in the United States. This country is also the world's largest importer of organic bananas, just ahead of Belgium. Currently, around 10% of banana sales in the United States are organic. The European Union imported 749,000 tons of organic bananas in 2019 (+15% vs 2018). Consumers in the Republic of Korea, Japan and China are increasingly interested in organic bananas.

1- Ecuador is the main producer of conventional bananas and the leading exporter.

- Nonis (*Morinda citrifolia*):

20,584 ha of nonis were grown organically in 2018. They are produced, especially in Oceania. These fruits are used to produce juice.

- Mangoes:

18,662 ha of mangoes were grown organically in 2018. Organic mangoes are grown in many countries in Latin America, Africa and Spain[1].

- Avocados:

Mexico was the main producer of organic avocados in 2017[2], but its 2018 areas are not known. Kenya was the second largest producer of organic avocados in the world, with a very high share of organic avocado crops (72%).

- Dates:

12,025 ha of dates were grown organically in 2018, i.e., 0.9% of global areas.
In 2018, 61% of organically grown date palm areas were in Asia, 28% in Africa and 11% in North America. The main organic date growing countries in 2018 were Iran, Tunisia and Pakistan. The organic share for date palm areas was still quite modest in these 3 countries in 2018: 2% for Iran and Pakistan and 4% for Tunisia. The cultivation of organic dates is also starting to develop in Algeria.
Germany is a big importer of organic dates.

- Pineapples:

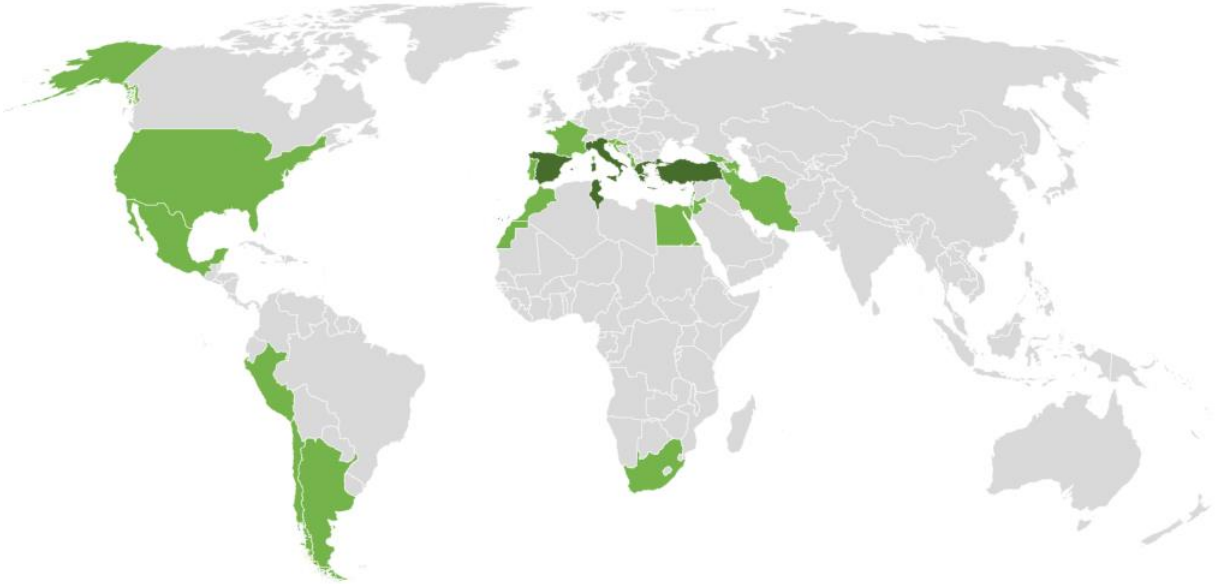
6,300 ha of pineapple were grown organically in 2018. This still only represented 0.6% of the global area for this fruit.
68% of global areas were in Africa in 2018 and 32% in Latin America. Costa Rica and Madagascar were the main organic pineapple producers in 2018[3]. The organic share of pineapple areas was 4.1% in Costa Rica and 11.4% in Madagascar in 2018. 1% of African pineapple areas were grown organically in 2018.
Benin and Ivory Coast are also developing their organic pineapple production.

1- In conventional, Thailand and Mexico are the main mango exporting countries.
2- In conventional, Mexico is the leading producer and exporter of avocados.
3- In conventional, Costa Rica and the Philippines are the main producers and exporters of pineapples.

Organic olive groves: mainly in the Mediterranean rim

■ 872,237 ha of olive groves were grown organically in 2018 (+1% vs 2017), i.e., 8.2% of global olive groves[1].

Countries with olive trees grown organically in 2018



Countries growing olive trees organically

Country with over 20,000 ha of olive trees grown organically

Source: Agence BIO/Many different sources

■ In 2018, 69% of organic olive groves were in Europe[2] and 29% in Africa (mainly in North Africa). In 2018, the main organic olive producers were Tunisia (241,152 ha), Italy (239,096 ha) and Spain (200,129 ha). 15.1% of Tunisian olive groves were grown organically in 2018, 18.0% in Italy and 7.8% in Spain. France is the country with the highest organic share: 30.0% in 2018.
Almost all Italian organic production is intended to produce oil.

■ In 2016, US[3] imports of olive oil amounted to nearly € 190 million (i.e., 20% of their total imports of olive oil). In 2016, 44% of imports by value of organic olive oil from the United States came from Italy and 31% from Spain.

■ In 2019, the European Union imported over 33,600 tons of organic olive oil (+11.6% vs 2018). This represented 1% by volume of EU organic imports and 19% of its olive oil imports. In 2019, organic olive oil imported by the European Union only came from Tunisia. France and Germany are the EU's main markets for organic olive oil.

1- *The share was 10.0% in the EU in 2018.*
2- *The European Union is the world's largest producer of conventional olive oil.*
3- *the world's largest importer of olive oil*

Organic nuts: 5.3% of nuts orchards

■ 711,468 ha of nuts were grown organically in 2018 (+14% vs 2017).
In 2018, 48% of area grown organically were in Europe, 31% in Africa and 12% in Latin America and 8% in Asia.

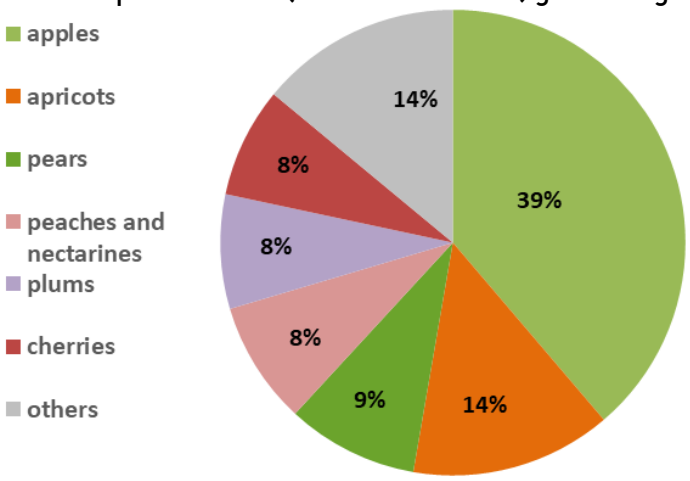
In the main organic nut producing countries, the organic share was already high in 2018: Spain: 23.6%, Italy: 29.8%, France: 40.1% and Turkey: 9.3% , 6.2% in Brazil, nearly 5.0% in China. However, it was only 1.1% in the United States and 2.5% in Ivory Coast.
7.6% of the global almond orchard was grown organically in 2018. Spain was the main producer of organic almonds with 143,458 ha in 2018, i.e., 22.6% of Spain's almond orchard.
3.5% of the world's chestnut orchards were grown organically in 2018. Italy was the largest producer of organic chestnuts with almost 17,000 ha in 2018, ahead of China (almost 15,400 ha i.e., 4.6% of his chestnut orchard).
3.8% of the world walnut orchard was grown organically in 2018. China was in first place for organic walnut orchards with nearly 37,000 ha in 2018 (7.5% of its walnut orchard), ahead of France and the United States.
Only 0.2% of the world's pistachio orchard was grown organically in 2018. Turkey was the leading producer of organic pistachios in 2017 with nearly 18,400 ha. In 2017, 19.6% of Turkey's pistachio orchard was grown organically. Turkey exports a lot of organic nuts.
The organic hazelnut orchard was still very modest in 2018 (0.1% of the area). Italy and Turkey were the main growers of organic hazelnuts in 2018.
Kenya was the main producer of organic macadamia nuts with over 50,500 ha in 2018. The United States was the main producer of organic pecans (nearly 2,900 ha in 2018).

Organic temperate fruits: almost stable areas in 2018

■ 223,516 ha of organically grown temperate fruit (excluding berries) were recorded worldwide in 2018. However, the areas are underestimated. Figures for India and Uzbekistan, which are among the major producing countries of temperate fruits, are not available. 1.9% of the recorded temperate fruit orchards were grown organically in 2018.
In 2018, 62% of organic temperate fruit areas were in Europe and 24% in Asia. China was the main producer of this category of fruits in 2018 with nearly 23% of global areas, ahead of Italy, France and Turkey.
Latvia is the country with the highest share grown organically: 33.0% in 2018. In China, the share was 0.8%, in Italy 12.4%, in France it was 22.2% and in Turkey 4.0%.

■ Apple is the main species of temperate fruit grown organically, with over 86,600 ha, i.e., 39% of the areas in 2018. 1.8% of the global apple orchard was grown organically in 2018. 66% of the areas were in Europe and 23% in Asia. In 2018, China and France were the main growers of organic apple trees. Only 0.9% of the Chinese orchard was grown organically in 2018, while the share was 29.8% in France.

Over 223,500 ha of temperate fruits (berries excluded) grown organically in 2018



Source: FIBL/IFOAM

■ In 2018, over 31,200 ha of apricot trees were grown organically. 51% of organic apricot areas were in Europe and 48% in Asia. China was the first producer with 46% of global areas, ahead of Turkey (27%). The share grown organically was already very high in China in 2018 (73.7%), it was much lower in Turkey (6.7%).

■ In 2018, over 20,400 ha of pear trees were grown organically. This represented 1.5% of the world's pear orchard. 43% were in Europe, 30% in Asia and 23% in Latin America. China and Argentina were the main growers of organic pear trees. In China, the share grown organically was still only 0.6% in 2018, by contrast, it had already reached 18.5% in Argentina.

■ In 2018, peach and nectarine trees were grown organically on nearly 19,100 ha. 59% were in Asia, a third in Europe and 7% in North America. China was the leading producer with 58% of the global area in 2018. However, only 1.4% of its orchard was grown organically in 2018.

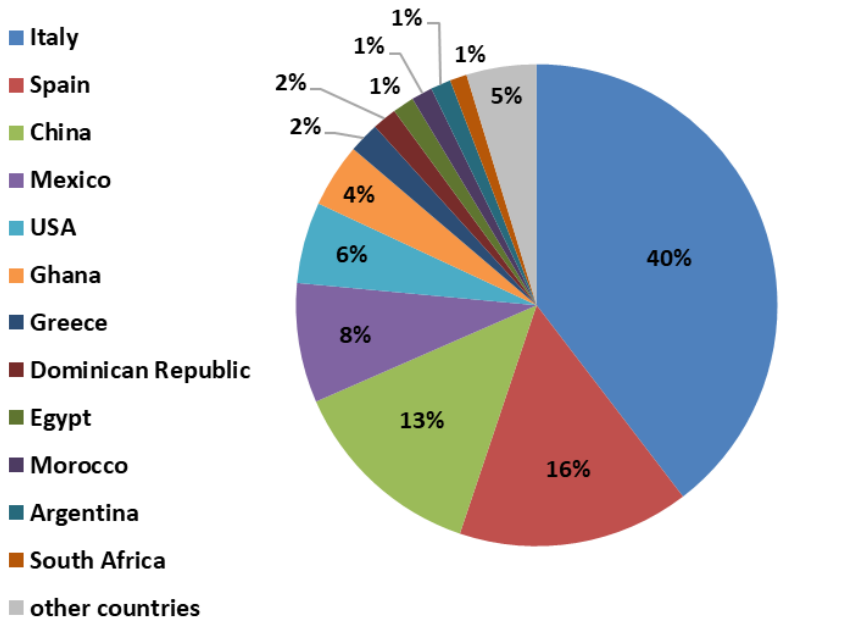
■ Chile exported 25,000 tons of organic apples in 2018. Its main customers are the USA and the Netherlands.

Organic citrus: Italy ahead

■ In 2018, 90,047 ha were devoted to organically grown citrus around the world (-8% vs 2017). This represented 1.0% of the citrus orchard worldwide. As there are no data available for two of the main conventional citrus producers, India and Brazil, the areas grown organically are underestimated.
In recent years, the areas of citrus orchards grown organically have declined due to the Citrus Greening Disease which has caused many losses in Latin America and the United States. More than 90% of Florida citrus orchards are believed to have been contaminated. Costa Rica, Honduras, Belize and the Dominican Republic have abandoned the cultivation of organic oranges because of this disease. Since 2011, the *FIBL* has been carrying out a study on this disease in Mexico to develop solutions: management of soil cover to ensure the presence of useful insects, use of biological control with fungi and insects. parasitoids and induction of resistance in trees, using organic fertilizers.

59% of the organically grown orchard recorded were in Europe in 2018, 14% in Asia, 13% in Latin America and 8% in Africa. Italy was the main producer of organic citrus (35,660 ha in 2018 i.e., 40% of the world orchard). 24.4% of the Italian citrus orchard was grown organically in 2018. It was followed by Spain and China.

Breakdown of organically grown citrus orchards in the world in 2018



Source: FIBL/IFOAM

The share of citrus orchards grown organically was also especially high in Ghana (15.2%[1]) and France (9.6%).
Orange is the main citrus grown organically and Italy is the leading producer[2], ahead of Spain and Ghana. Spain produces mainly oranges and lemons and China mainly grapefruits and pomelos.

Organic berries: more than 2/3 grown in Europe.

61,549 ha of berries grown organically were recorded worldwide in 2018 (-3% vs 2017). 11.3% of berry areas were grown organically in 2018.
In 2018, 67% of areas were in Europe, 17% in North America and 15% in Latin America.
Nearly 9,100 ha of blueberries were grown organically worldwide in 2018, i.e., 8.3% of the global area of this berry. Canada was the main cultivator of organic blueberries with nearly 6,500 ha grown organically in 2018 (i.e., 13.2% of national areas). Chile and the United States are also major producers of organic blueberries. In Chile, 25% of blueberry areas were grown organically in 2018. However, only 10% of its blueberry exports were organic. Chile's organic blueberry exports amounted to € 114 million in 2018. The United States is the main destination for Chilean organic blueberries. 6.3% of US blueberry areas were grown organically in 2018. The production and export of organic blueberries is also growing in Mexico and Argentina.

1- 20,8% for orange trees.
2- 24.4% of the Italian orange orchard was grown organically in 2018.

Argentina was the leading producer of organic cranberries with more than 960 ha grown organically in 2018, ahead of Canada (800 ha). 10% of Canadian cranberry areas were grown organically in 2018 (compared to 8.1% in 2017). Quebec is the main producing region for organic cranberries in Canada.
In 2017, sales of organic berries in supermarkets in the United States increased by 22% in value compared to 2016.

Organic Fruits and Vegetables Market

- Fruits and vegetables are one of the main categories of organic products consumed in most countries.

- In the United States, with € 16 billion[1], organic fruits and vegetables (fresh and processed) represented 36% by value of the organic food market in 2019 (+5% vs 2018) and 15% of the national fruit and vegetable market (fresh and processed). This category is often the first kind of product purchased organically by American consumers. The West States of the USA are the most important for organic fruits and vegetables consumption. Bananas, carrots and apples accounted for 41% of the volumes of organic fruit and vegetables sold in the USA in 2019. During the first half of 2020, sales of organic fruit and vegetables continued to grow, especially those of bananas.

- In Switzerland, organic fruit and vegetables[2] sales amounted to more than € 546 million in 2019 (+4.3% vs 2018). 20.3% of Swiss fruit and vegetable sales were organic in 2019.

- In 2019, the European Union imported over 29,800 tons of organic citrus[3] (+ 3% vs 2018), 38,000 tons of organic apples and pears[4] (-36% vs 2018) and nearly 886,000 tons of fruit tropical, organic nuts and spices (+12.8%). The products in this large category came mainly from the Dominican Republic, Ecuador and Peru.

The organic vineyard: 74% of the global organic vineyard in Spain, Italy and France

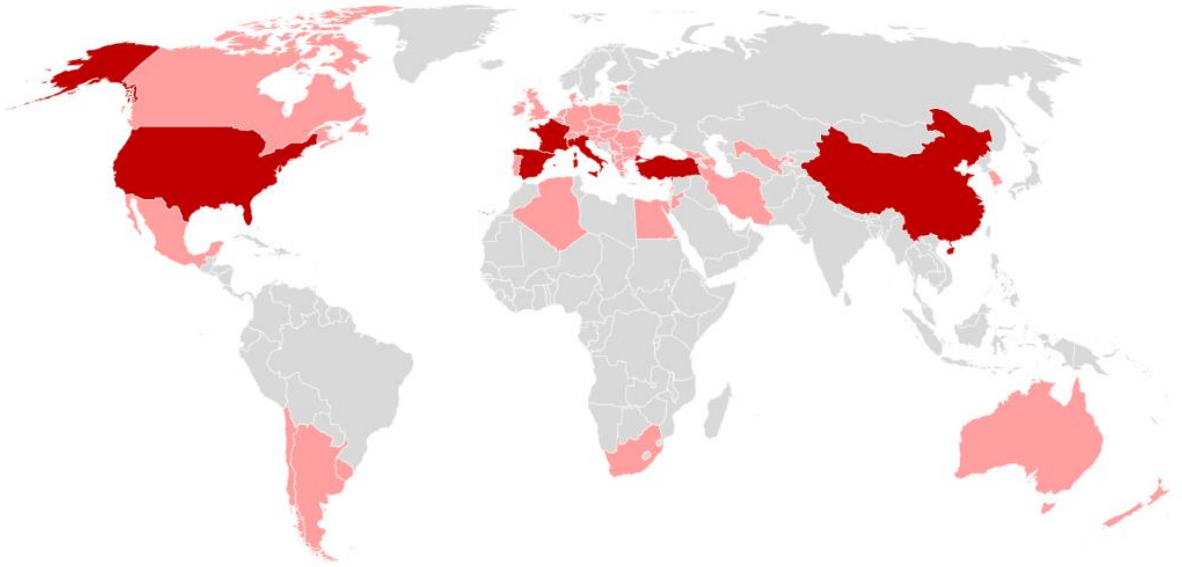
- In 2018, the global organic vineyard was 422,277 ha (+5% vs 2017), i.e., 6.1% of the global vineyard[5].

Most the world's organic vineyards is dedicated to wine grapes. However, in some countries, such as Turkey, a significant part of the vineyard is used to produce table grapes or raisins.

1- Of which 2.9 billion € for fresh vegetables and 1.96 billion € for fresh fruit.
2- Salads and potatoes included.
3- Of which 53% lemons and 23% oranges (excluding juice).
4- Argentina is the EU's main supplier of organic apples and pears.
5- 11,1% in the European Union in 2018

ORGANIC SECTOR IN THE WORLD

Countries with a vineyard grown organically in 2018



Countries with a vineyard grown organically

Country with over 10,000 ha of vineyard grown organically

Source: Agence BIO/Many different sources

More than fifty countries had a vineyard grown organically in 2018. 87% of the global vineyard grown organically was in Europe[1]. The top three countries growing grapes organically in the world were Spain, Italy and France. The share of the national vineyard grown organically is significant in these three countries: 15.9% in Italy, 12.1% in Spain and 12.0% in France[2] in 2018.

China was ranked 4th in the world in 2018 with nearly 5% of the global vineyards grown organically. It fell by 18% in 2018. 2.6% of Chinese vineyards were grown organically in 2018. It was followed by Turkey and the United States. The vineyard grown organically in Turkey fell by 2% in 2018. In 2018, 3.7% of the Turkish vineyard was grown organically. In the United States, the vineyard grown organically reached 11,071 ha in 2016 with a share of the national vineyard of 2.7%.

The Argentinian vineyard grown organically fell by a third in 2018 compared to 2017 and the Chilean's one by 24%. The share grown organically remained quite low in these two countries in 2018 (1.6% each). Argentine organic wines are primarily intended for export, mainly to the European Union and the USA. In 2018, Chile exported 9.2 million liters of organic wine for an amount of almost € 36 million.

In South Africa, the vineyard grown organically more than tripled between 2016 and 2017 and grew by 63% in 2018.

5.1% of New Zealand vineyards were grown organically in 2018. New Zealand exported € 25.9 million of organic wine in 2017. Organic wine represented 2.8% by value of New Zealand wine exported in 2017.

In Australia, organic wines are mainly produced in the south of the country.

1- 82% in the European Union.
2- 14,1% in France in 2019.

ORGANIC SECTOR IN THE WORLD

According to *IWSR/Millésime Bio*, the production of organic wines in the three main producing countries approached 10.6 million hectoliters in 2018. Italy was the world's largest producer of organic wine. In 2018, it produced over 5 million hectoliters. It was also the leading exporter of organic wines. It exported 88% of its production in 2018. Spain exported 91% of its organic wine production in 2018 and France 43% in 2019.

Global consumption of organic still wines exceeded 5 million hectoliters in 2017. It almost doubled between 2012 and 2017. Europe[1] represented 77% of the market, the Americas 11% and the Asia-Pacific region 10%. In 2017, the main volume markets for organic still wine were Germany (23.9%), France (16.4%), the United Kingdom (10.2%), the United States (7,9%), Sweden (7.4%) and Japan (6.0%).
Germany is the world's leading importer of organic wines (main origins: Spain, Italy and France). According to *IWSR/Millésime Bio*, Germany nevertheless exported 12% of its organic wine production in 2018. The organic wines consumed in France are mainly of national origin.
In the United States, sales of organic wines reached € 277 million in 2016, an increase of 5% compared to 2015 and a doubling compared to 2007. A significant share of the organic wine consumed in this country is imported (40% in value in 2014). In 2014, French organic wines represented 20% by volume and 40% by value of imports from the USA. Only 1% of the United States' organic wine production was exported in 2018.
In Asia, the organic wine market is still quite limited. Three-quarters of organic wines imported by Japan come from France. South Koreans are increasingly interested in organic wines.
Organic wines are increasingly popular with Australian consumers.

According to the study carried out by *IWSR* for *Millésime Bio* 2020, to meet the needs of the market, France, Italy and Spain will considerably accelerate the conversion of their vineyards[2] to reach a production of 15 million hectoliters in 2023. This development should affect both still wines and sparkling wines. Italian organic production is expected to reach 6.9 million hl, French production nearly 4.6 million hl and Spanish production close to 4.5 million hl.
According to the same study, France should become the world's leading market for organic wine from 2023 with a fifth of the total and overtaking Germany. The Spanish market is expected to take off. The United States is expected to become the world's third largest market for organic wine in 2023.

1- Without members of the Commonwealth of Independent States.
2- According to this study, the rate of conversion is expected to double in France.

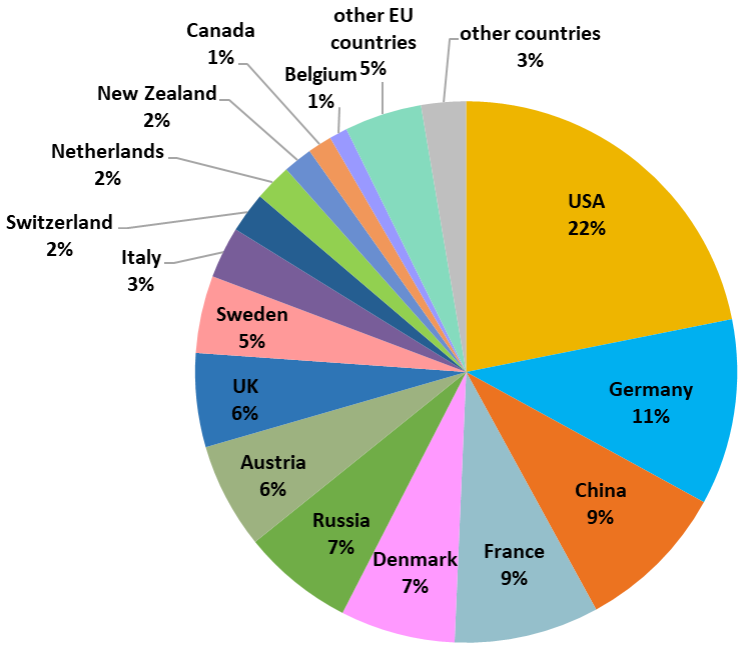
Focus on organic breeding:

Focus on the organic dairy sector: The United States in the lead

■ According to our estimates, global production of organic cow's milk exceeded 10 million tons in 2018, which still represented only 1.4% of global cow's milk production.

■ The United States remained the leading producer of organic milk in 2018, ahead of Germany and China.

Breakdown of global organic milk production in 2018



Source: Agence BIO/Many different sources

■ Between 2012 and 2017, the production of organic milk in the United States increased by 3.6% on average per year. Organic represented more than 2% of US milk production in 2018. Organic milk production must have approached 2.2 million tons in 2019. In 2017, the United States had approximately 228,000 organic dairy cows (i.e., 2.5% of its dairy cows), spread over around 3,000 farms. California and Wisconsin are the states where organic dairy production is the most developed. More than a fifth of dairy farms in the state of Maine produce organic milk.

■ Canada produced nearly 145,000 tons of organic milk during the 2018/2019 campaign, an increase of 2% compared to the previous campaign. Quebec ranked 1st for organic milk production (53% of Canadian production)[1].

1- In 2016, the Organic Dairy Farmers Union of Quebec announced that it planned to double its production by 2023.

ORGANIC SECTOR IN THE WORLD

■ In the European Union, over 934,000 dairy cows were certified organic in 2018. Organic milk production exceeded 5.4 million tons in 2018. According to initial estimates, it was around 5.7 million tons in 2019.

The number of farms in conversion to organic increased after the deregulation (end of milk quotas) of the EU market in 2015, as farmers sought greater market stability.
In Germany, collection approached 1.2 million tons in 2019 (+6% vs 2018). The organic share of milk was 3.7%.
France is the second EU largest producer of organic milk with deliveries exceeding 1 million tons in 2019 (+16% vs 2018). The organic share of milk was 4.1%.
The production of organic milk is also developed in Switzerland, where organic represented 7.6% of the deliveries in 2018 (258,444 tons, an increase of 6% compared to 2018).
Russian organic dairy production is growing rapidly, especially in the Moscow region. According to Russian experts, the Moscow region produced 670,000 tons of organic milk in 2018 and is expected to reach 1 million tons by 2021. Russia wants to be able to produce more organic milk to meet the needs of the industry infant feeding.
In Norway, organic production amounted to almost 51,800 tons in 2018, but fell 2.1% in 2019[1].

■ In China, ten organic dairies have been set up over the past decade. Organic production exceeded 910,000 tons in 2017. Organic milk production is also expanding in other Asian countries, such as Laos.

■ In New Zealand, new organic milk processing tools have been put in place in recent years. More and more dairy companies are getting involved in the organic sector. New Zealand produced more than 175 thousand tons of organic milk in 2017.

■ In Australia, organic milk production was around 46,000 tons in 2017 and was estimated to be around 61,000 tons in 2018. The production of organic milk powder has been growing for several years. The state of Victoria is the main area for the production and processing of organic milk. In 2018, 67% of organic milk processors were in this state.

■ The global market for organic dairy products was € 15 billion in 2017 (+8% vs 2016). It is growing by about 8% per year. It represented 16% of the global organic market in 2017 and ranked 2nd, just behind fruits and vegetables. According to *OMSCO*, the organic dairy market is expected to reach nearly € 25 billion by 2023.
According to *OMSCO*, the introduction of organic ranges by international dairy brands has contributed to the increased presence of organic products in the global dairy market.
According to this British cooperative, the new availability of raw milk should support global growth in the coming years. The challenge is to ensure balanced and smooth growth of supply and demand to ensure the price stability which conditions producer confidence.

1- Decrease in organic livestock.

Fluid milk is the main organic dairy product consumed globally, it represented 24% of the organic dairy market in 2017. The USA is the largest organic liquid milk market, with 54% of global sales in 2017, ahead of Germany (11%) and France (7%).
In many countries, as the market for organic dairy products grows, production diversifies. According to *OMSCO*, the organic cheese market is expected to grow by 14% per year on average by 2025. The main markets will remain Europe and the United States, but organic cheese sales are also expected to grow in China, India and Brazil.
Infant milk formulas are one of the fastest growing categories of organic dairy products. It represented € 1.24 billion in 2017[1], i.e., 3% of the total infant formula market. According to *IMF*, the market for organic milk powders is expected to reach $ 3.06 billion by 2027.

■ The United States is the world's largest market for organic dairy products with sales valued at € 6.6 billion in 2019. Dairy products are the second best-selling category of organic products[2] behind fruits and vegetables.
According to the *U.S. Beverage Market Outlook 2019 report*, the percentage of Americans purchasing organic milk increased from 4% to 13% between 2010 and 2018.
In 2017, organic products represented 8% of dairy product sales in the United States. Milk was the main organic dairy product sold. Its market share was 5.2% by value in 2017. However, sales of organic milk declined slightly in 2017, while those of organic yoghurts and cheeses continued to show strong growth. Organic milks are suffering from the growth in popularity of milk substitutes and the decrease in the number of families with children. According to *OMSCO*, the slowdown in liquid milk sales can be attributed to several factors: this is not unusual after a period of strong growth like that of 2014-15. This slowdown was accentuated by the collapse of the conventional milk market, which further widened the gap between the prices of organic and conventional products and put pressure on the organic premium. There is more competition for organic milk: "GMO-free", "grass-fed cows", "protein-enriched" milk, but also milk substitutes. Finally, the habits of American consumers are changing, leading to a drop in the overall consumption of milk, mainly in favor of bottled water.
The United States is much more self-sufficient in organic milk than it was a few years ago thanks to increased production.
In 2017, sales of organic cheese in the United States amounted to € 536.7 million, or around 8.5% of the national cheese market.
In 2018, the slowdown in the organic dairy sector continued in the US market. The stagnation mainly concerned liquid products. Sales of organic milk increased 0.6% compared to 2017. *OMSCO* estimates, however, that organic milk sales in the United States should start growing again in the coming years. The United States exports between 1 and 2% of their organic milk.

■ When it comes to Europe, the organic dairy sector is one of the largest in the organic category in many EU countries. For example, organic dairy products account for over 20% of all organic food sales in the UK and Germany.

1- More generally, according to Market Research Future, the global market for organic infant products has been valued at just over € 4.3 billion for 2017. It is expected to exceed € 14.6 billion by 2027.
2- Dairy products represented 14% by value of the organic food market in the United States in 2017.

ORGANIC SECTOR IN THE WORLD

According to *OMSCO*, although medium-term demand growth for organic dairy products is expected to slow as the market expands, it will continue to show strong year-over-year growth.

Germany is the second largest market for organic dairy products worldwide, although this market is maturing. Organic products represent a significant share of the national consumption of dairy products. The category with the largest organic market share is liquid milk (12.1% in value), followed by yogurt (7.7%) and cheese (4.4%). About 30% of the organic milk consumed in Germany is imported. In 2017, organic milk exports exceeded 100,000 tons (a significant share of which was exported in powder form to Asia).

In 2019, the organic dairy products market exceeded € 1.2 billion in France (14% vs 2018), i.e., 11.0% of the French organic market.

In Switzerland, sales of organic dairy products stagnated in 2019, reaching € 326 million. Dairy products were, however, the most purchased organic products by the Swiss in 2019. 11.0% of dairy product sales in 2019 were organic.

In Norway, organic represented 2% of sales of dairy products in supermarkets in 2018. Sales of organic dairy products in this channel increased by 11% in 2018.

Europe remains one of the biggest markets for organic infant formula. It is also the largest producer of infant milks, both organic and conventional.

In the ripened cheese market in Western Europe, sales of organic cheeses were valued at € 73.8 million in 2017. Almost 400 new organic cheeses were launched in Western Europe in 2017, with cheddar remaining the dominant variety.

- In Canada, milk is the main organic dairy product consumed. the organic milk market share was 3% in 2014, with strong differences between provinces.

- Asia represents a growing opportunity for organic dairy products. In China, the organic milk market is growing, but the organic share was still under 2% by value in 2017. However, it was expected to double between 2017 and 2023 to reach € 1.6 billion. The market share is much greater for infant formula: around 7% by volume in 2014. China has become one of the main markets for organic infant formula. A very important part of Chinese mothers gives organic milk powder to their babies. In 2018, sales of organic infant formulas increased by 50% compared to 2017. More generally, the organic infant food sector is experiencing strong growth in China and it is expected to continue over the next ten years. China imports organic infant milk powder, particularly from Australia, New Zealand and Europe. China is seen as a promising market for many European countries investing in drying for the manufacture of organic milk and whey powders.

In the Republic of Korea, the organic milk market has grown very fast in recent years, reaching € 54 million in 2016.

Like China, India continues to experience a development of the middle classes. As young families are richer, the demand for organic formulas for infant formula is increasing rapidly. However, this is an embryonic market and pricing and distribution issues mean that its future is not yet sure.

Japan imports organic dairy products, especially from Australia. Organic milk and other dairy products like organic butter and cheese are still hard to find in traditional supermarkets outside of Tokyo or Osaka. Nonetheless, there are good growth prospects for the dairy market in Japan. Danish company Arla Foods has started marketing organic milk in the United Arab Emirates and Malaysia.

- In Australia, the organic milk market share exceeded 4%. For the moment, the organic infant formula market is relatively small.
In New Zealand, sales of organic products are growing rapidly, however, the market share by value of organic milk was still only 2.5% in 2015. New Zealand exports organic milk.

- In Latin America, sales of organic infant formula are still underdeveloped, but should increase over the next few years. In Brazil, sales of organic baby foods (including infant formula) grew faster than those of other packaged products in 2017.

- The market for organic infant milks is growing in other countries, such as Lebanon and South Africa.

Focus on the meat sectors: heterogeneous development from one continent to another

- Organic cattle breeding is much more developed in Europe (in particular in the European Union), than in the United States and Australia. In Europe, the main organic cattle breeding countries are France and Germany. The European Union had over 4.6 million certified organic cattle in 2018.
The Australian herd more than doubled between 2011 and 2016. Almost a third of Australian organic producers raised cattle in 2016. The state of Queensland is the main area for organic beef farming. Beef is Australia's most exported organic product.
Organic cattle breeding is still very little developed in Argentina (2,300 organic cattle in 2014). In Chile, organic farming is still extremely modest and seems mainly intended for the domestic market.
In the United States, organic meat sales increased by more than 17% in 2016 compared to 2015, reaching € 940 million. In 2015, 5% of ground beef sold in the United States was organic and 3.3% of other cuts of beef.
In 2019, the European Union imported 486,000 tons of organic beef (fresh and processed).

- Organic pig farming is much more developed in Europe than in the USA. Germany, Denmark and France are the main EU organic pig breeding countries. The European Union had more than 1.2 million certified organic pigs in 2017 (0.8% of its herd). Only 0.4% of pork sold in the United States in 2015 was organic.

Organic sheep farming seems to be still more developed in Europe than in the rest of the world. The UK, Italy and Greece are the main organic sheep breeding countries in Europe. Nearly 5.0 million sheep were certified organic in the European Union in 2017 (5.8% of the herd).
In Australia, less than 1% of lamb production was organic in 2008. The current Australian herd is not known.
In New Zealand, nearly 65,000 organic lambs were slaughtered in 2017.

There is no estimate of the overall organic meat market. The market for processed organic beef has been estimated at € 5.7 billion for 2017. Europe and North America are the main markets for organic meat. In the United States, sales of organic meat amounted to € 683 million in 2017 (+8.5% compared to 2016[1]). In France, sales of organic meat (excluding poultry) were € 940 million in 2018 (+18.7% compared to 2017). In China, the largest producer and consumer of conventional meat, 149,000 tons of organic meat were sold in 2016. Chinese demand for organic meat is growing. In Switzerland, sales of organic meat are progressing much less quickly than those of other categories (+1% for fresh meat in 2019 and +2.9% for sausages and cold meats. Organic represented 5.9% of sales of fresh meat in Switzerland in 2019.

Focus on the organic poultry sector: The United States is the leading producer of organic broilers.

The United States is the main producer of organic broilers worldwide with a flock of 28.6 million animals in 2011, ahead of the European Union (nearly 24.5 million in 2018). However, the share of organic broilers was still very low in the United States.
The United States is also the main market for organic poultry. 6.7% of the chicken meat sold in the United States in 2015 was organic. The share was only 1.4% for turkey meat. In 2018, sales of fresh organic chickens increased by 11.1% in value compared to 2017.

The EU is the world's leading producer of organic eggs with a herd of nearly 23.6 million organic laying hens in 2018, ahead of the United States (14.6 million heads in 2019).
The market share of organic eggs is high in several European countries like in Switzerland where it amounted to 28.7% in value in 2019. Sales of organic eggs are increasing in Europe with, in 2019, increases in value of 7% in Switzerland[2] and of 22% in France.

1- Sales of conventional meat fell 3% in 2017 compared to 2016.

[2]- During the second quarter of 2020, the sale of organic eggs even increased by 18% compared to the second quarter of 2019.

Organic beekeeping: Brazil in the lead in 2018

- Nearly 2.6 million organic beehives were recorded around the world in 2018.

- In 2018, 37% of organic beehives were in Latin America, 37% in Europe and 15% in Africa. Brazil was the country with the most organic beehives in 2018 (629,939), ahead of Zambia (388,067) and Bulgaria (227,721).

- Experts expect organic beekeeping to continue its development thanks to the growing demand for organic honey and beekeeping products. The two major challenges are conversion, due to the difficulty in accessing knowledge on organic beekeeping practices and the fight against the Varroa parasite.

- Organic honey market is currently valued at € 576 million. It is estimated to exceed € 994 million by 2027.

- In 2016, the United States imported nearly € 70 million of organic honey (i.e., 18% of its total honey imports).

- In 2019, the EU imported 17,900 tons of organic honey (+2.6% vs 2018). China, Mexico and Brazil were the main origins.

Organic aquaculture: nearly 620,000 tons

- The *IFOAM Aquaculture Group* was created in 2003. In 2005, *IFOAM* adopted a standard for organic aquaculture. Legislations on organic aquaculture has been implemented, especially in the European Union (2009), Norway, Canada, Brazil, China and India. So far, the work done in the United States has not yet resulted in legislation on organic aquaculture.

- Global organic aquaculture production was estimated at nearly 620,000 tons in 2017, an increase of 49% compared to 2016, mainly due to the growth in Chinese and Vietnamese production. Global production has grown rapidly, amounting to only 5,000 tons in 2000. According to experts, organic aquaculture production is expected to continue to grow thanks to the expansion of existing farms and the arrival of new operators in the sector. It could reach 1.2 million tons in 2030. According to *FIBL/IFOAM*, Asia accounted for 86% of global organic aquaculture production in 2017 and Europe 14%. China is the world's leading organic aquaculture producer (526,500 tons i.e., 85% of world production). In Europe, the two main producers are Ireland (almost 40,900 tons, i.e., 6%) and Norway (13,600 tons, i.e., 2%).

- The global distribution by species is only available for 13% of global aquaculture production. According to available statistics, the main organic aquaculture productions are

salmon (over 36,000 tons in 2017), mussels (19,400 tons), aquatic plants (9,000 tons), shrimps (nearly 6,000 tons).) and carp (over 5,600 tons). In total, around thirty species are farmed organically: shellfish (shrimp, crayfish, crab, lobster and langoustine), fish (salmon, sea bass, trout, carp, catfish, sea bream, sturgeon, char, tilapia, carp, sea bass, silver perch, cod, etc.), mollusks (mussels and oysters). Sea cucumbers, seaweed and samphire are also produced.

The production of organic fish has developed more in Europe, Asia and Latin America than in other continents.

Organic shrimp are produced in Latin America (Ecuador, Peru and Brazil), Africa (mainly Madagascar[1]), Asia (especially Vietnam[2], Thailand, Bangladesh, Kerala in India and Indonesia) and, recently , in the United States (Florida and California).

Europe mainly produces organic mussels and fish, in particular salmon, sea bass, sea bream, several species of trout and carp. In Latin America, shrimp is the main species produced. In Asia, the main organic aquaculture species produced are shrimp, catfish and carp. In Canada, the publication of the specifications for organic aquaculture products in 2012 enabled the development of organic fish, mollusks and algae production. Australia and New Zealand produce organic shellfish.

- In 2013, the market for organic aquaculture products was over € 1 billion compared to only € 230 million in 2009[3].

- The European Union is the leading market for organic aquaculture products worldwide and is experiencing strong growth, mainly with salmon and shrimp. The UK and Germany were the top consumers of organic aquaculture products in the EU in 2019.
In 2019, the European Union imported nearly 7,100 tons of organic fish (+22% vs 2018).

- The organic fish market is developing in Asia.

- In the United States, the organic fish and seafood market is still relatively small. Only 0.3% of shrimp imports by volume are organic (250 tons).

1- Malagasy organic exports of shrimps have exceeded 1,600 tons per year since 2016.
2- Vietnam aims to sharply increase its organic aquaculture production by 2025.
3- At the time, according to experts, only 70% of the world's organic aquaculture production was sold organically.

Willingness to develop the organic sector and public policies

■ Organic farming is increasingly seen as the most sustainable kind of agriculture. Therefore, many governments are supporting its development.

■ Governments have a key role in the development of organic farming and market in their country. For several years, public-private cooperation has also increased in many countries, on all continents. The role of associations and NGOs is also very important.

IFOAM's actions

■ *International Federation of Organic Agriculture Movements* was created in 1972. This umbrella organization carries out many actions to develop organic agriculture around the world. It has succeeded in facilitating the building of a dynamic organic movement and sector on a global scale, with active institutions and local and global organic sectors. Its mission has evolved. For a long time, *IFOAM* has been oriented towards actors in the sector and focused on unifying and assisting its members. Now it is also about the overall strategic planning of the global organic movements for growth and sustainable development, to increase the positive impacts on the planet and the people. The next *IFOAM* world congress was due to take place in September 2020, in Rennes, France, but had to be postponed due to the COVID-19 pandemic.

■ *IFOAM* published a guide on public support for organic farming[1].

■ In 2017, it adopted a new strategic plan aimed at bringing organic farming towards greater sustainability. The three key factors are the improvement of supply with the development of the capacities of producers and other actors in the sector, the stimulation of demand with communication and awareness campaigns and advocacy for a political environment guaranteeing sustainable production and consumption.

■ *IFOAM* has been supporting and promoting participatory guarantee systems since 2004.

■ In 2015, the *IFOAM Apiculture Forum* was created. Its main goal is to promote the development of organic beekeeping and encourage traditional practices of sustainable beekeeping. Its tasks are to expand the current standards of organic beekeeping, to raise awareness of the need to fight against environmentally damaging practices and harmful to bees and to guarantee beekeepers a sustainable source of income. The fifth international conference on organic beekeeping was organized in March 2019 by the *IAF* and the *University of Hohenheim* in Germany.

1- https://www.ifoam.bio/sites/default/files/policy_toolkit_main_report.pdf

In Europe

Europe and in particular the European Union, has been a pioneer in terms of public support for organic farming. Between 1987 and 1993, many European countries introduced subsidies for conversion, or even for converted areas, on a national or regional basis. Currently, the *Common Agricultural Policy* remains one of the major financial support tools for the organic sector development. There are, however, other kinds of public support which target research, structuring of sectors, canteens or household consumption. National or regional development programs have been set up by many EU countries[1].

The last action plan for the future of organic production in the European Union was adopted in 2014. It included 18 actions to be implemented by 2020 with three specific priority areas: the competitiveness of organic producers, consumer confidence and trade with Third Countries. The intended results were the growth of production and demand, as well as the development of international trade.

In July 2020, the European Commissioner for Agriculture and Rural Development, Janusz Wojciechowski, announced that a new action plan for organic farming for the next 5 years was in preparation. This should make it possible to achieve the goal of the "From Farm to Fork" strategy of at least 25% of the EU's UAA grown organically by 2030. A comprehensive consultation strategy has been carried out at different levels in 2020 to collect and analyze the opinions and ideas of citizens, civil society, authorities in Member States and organizations in the organic sector on the actions to be developed. The new action plan will be presented in 2021. It will have 3 main axes: stimulating demand for organic products while maintaining consumer confidence, encouraging the increase in acreage in the EU and strengthening the role of organic production in the fight against climate change and biodiversity loss.

European Union has postponed for two years its reform of the Common Agricultural Policy[2]. Until then, everything will remain the same. The next CAP period will cover 2023 to 2027.

European Union and the Member States support research on organic farming. This is financed within the framework of national research programs or national action plans for organic farming as well as through EU programs. Several research projects on organic farming have been funded under EU framework programs since the mid-1990s. Framework programs include *OK-Net Arable* (notably to share practical solutions between EU organic farmers via the Organic-Farmknowledge.org platform), *OK-Net EcoFeed* (to extend the platform's scope of action), *LIVESEED* (organic seeds and plant breeding) and *RELACS* (alternatives to problematic inputs). *CORE Organic* was launched under the Commission's *ERA-NET* program in 2004. It aims to intensify cooperation between national research and

1- Cf. Publication on Organic Sector in the European Union for more information for each country.
2- Originally, the new CAP should have been approved in 2020 and enter into force in early 2021.

aims to improve the quality, relevance and use of European research sources through coordination and collaboration. A new call for projects was launched in 2016. Technical demonstration days have been organized in France (*Tech & Bio*) and in Germany for several years.
Since 2013, a day dedicated to science has been organized at Biofach.
Since 2015, innovation days have also been organized by *TP Organics*.

- For the year 2021, the Commission plans to allocate a specific budget of € 40 million to organic farming as part of the promotion policy. This budget will co-finance promotional actions and information campaigns on the EU's organic sector, raising awareness of its qualities and aiming to stimulate demand.

- The *Organic Ecosystem project* aimed at developing the organic sector in six Mediterranean countries (Tunisia, Jordan, Lebanon, Italy, Greece and Spain) was launched late September 2020 in Tunis. It is funded by the European Union and has a budget of € 276,000. The goal is to reduce brakes on the development of organic farming and to strengthen the competitiveness and integration of medium and small enterprises operating in this sector. It aims to create a cross-border food ecosystem that will contribute to the development of the entire Mediterranean organic sector. This project aims to create innovative value chains and provide specific support to SMEs to improve the quality and marketing of products and their ability to access new markets.

- Support in European countries outside the European Union:

  - In Albania, the *Albanian Association of Organic Agriculture* (*OAA*) was created in 1997 by a group of agricultural advisers and farmers. Its goals are mainly to promote organic farming, to encourage the creation of groups of farmers and marketing channels for organic products, to advise companies and groups of farmers for the production, processing and marketing of organic products, offering training, workshops, conferences, publications and study tours to its members, assisting the Government and other institutions to establish agricultural laws and policies and to provide local certification.
    A strategy for the development of organic farming, including a national action plan, has been implemented for the period 2007-2013. There have been subsidies for organic farmers since 2008. The *Institute of Organic Agriculture* was created in 2010. It trains and advises organic operators and disseminates research results to them.

  - In Armenia, there is a regulation on organic farming since 2009. Organic farming is one of the priorities defined in the sustainable agriculture development strategy of the *Ministry of Agriculture of Armenia*. The *National Agrarian University* has a laboratory that works on organic farming.

  - In Belarus, a legislation on organic production was adopted late 2018. Organic farming is at the center of Belarus's social and economic development program for 2016-2020. However, organic farming is still very underdeveloped in this country. *Baranovichi State University* offers courses in organic farming and conducts research in this area. It has an educational farm, part of which is certified organic.

In the Federation of Bosnia and Herzegovina, organic farming is part of the Strategic Plan for Rural Development for the period 2018-2021. It includes financial support for organic producers. For the moment, the subsidy intended for organic farmers is the same as that for conventional farmers. However, support for promotion and certification is planned.
Although currently the two entities of Bosnia and Herzegovina have their separate laws on organic production (aligned with EU regulations on organic production), one of the requirements set by the European Commission in the process of pre-accession and integration into the EU is the adoption of a common national law on organic production of Bosnia and Herzegovina. This is still pending.

In Georgia, national regulations for organic products are similar to those in the European Union (there are some differences for farming and aquaculture).
In 2018, the *Elkana Organic Agriculture and Rural Tourism Network* implemented a rehabilitation project for Chiatura Central Park with financial assistance from the *World Bank*.
The *GRETA* project on sustainable mountain tourism and organic farming aims at the sustainable development of mountain tourism and to create a better economic environment to produce innovative products and services and of product quality, to generate new forms of income opportunities for local communities. This project supports the development of Georgian SMEs. It should improve the business environment and create new income opportunities in mountain tourism and organic farming. It started in 2019 for a period of 4 years. Total funding for the project is € 6.8 million and is provided by the European Commission (€ 3 million), Sweden (€ 2.8 million) and Austrian development cooperation (€ 1 million). The initiative focuses on Mestia, Lentekhi, Tsageri, Oni, Ambrolauri, Sachkhere, Chiatura and Tkibuli. Farmers, cooperatives and processors can receive financial assistance. Regarding organic farming, the main activities of the project are to fill the existing gaps and challenges, especially particular regarding operators' compliance with the new EU organic regulations and to publish and distribute easy-to-understand documents on organic farming (explaining new production rules, control mechanisms, evaluation recommendations, etc.).
A PGS has been set up in western Georgia.

In Iceland, there are no specific targets related to organic production or consumption. As part of Icelandic agricultural policy, subsidies are available for farmers who wish to convert their farmland to organic. The total amount available is around € 300,000 per year. This program was launched in 2017.
There is an organic farmers union, *Verndun Og Ræktun*, but it has only about 30 members.

In Kosovo, a national action plan for organic farming started in 2018. It runs until 2021. The goals are to increase the area grown organically, to promote organic farming, to develop the domestic market, to increase exports and train operators in the organic sector. Organic farmers receive state subsidy.

The *Faculty of Agriculture and Veterinary Medicine* of the *University of Prishtina* has a research and teaching activity on organic farming. The *Organika Association* represents Kosovar organic processors and exporters.

In Moldavia[1], the government created the first legislative framework for organic certification in 2005. The main emphasis is on exports. There is government subsidy for converting to organic farming[2].
Besides, strategic support for organic farming in Moldova is provided by *TAIEX*, the technical assistance and information exchange tool the European Commission. Moldovan organic farming is also supported by the *Czech Development Agency*.

In Montenegro, the first national action plan dedicated to the organic sector was put in place for the period 2012-2017. The goal was to support the development of production, processing and of the domestic market. The law on organic farming was adopted in 2013. The government has been providing financial assistance to organic farmers since 2017.
In 2016, a weekly organic market was created in Podgorica to allow organic farmers to sell their products. A project to promote organic products was launched the same year.
The *University of Montenegro* has research activity in organic farming.

In Norway, a national strategy for organic farming started in 2019. It runs until 2030. The goal is to stimulate organic production which does not meet demand. The areas of intervention are knowledge and skills, the facilitation of organic production and the development of an efficient value chain. A budget of € 17.8 million has been allocated to this strategy for 2019. There are conversion subsidies.
The *Norwegian Center for Organic Agriculture*, *NORSØK*, is a research institute and competence center for organic farming.
Oikos- Organic Norway, is the national organic movement in Norway. It informs about the organic sector and promotes it.
In addition, all conventional farmers wishing to convert their operation to organic farming have access to free advice from the *Norwegian Advisory Service*.

The Principality of San Marin aims to become totally organic.

In the Republic of North Macedonia, the first campaign to promote organic products took place in 2010. A national plan for organic farming was put in place for the period 2013-2020. Its goals are to strengthen the competitiveness of the organic sector, to increase the share of areas grown organically to reach 4% of the UAA, to certify 4% of the livestock and to strengthen associations of organic farmers. Subsidies to organic producers were substantially increased in 2015. Organic farming advice is still underdeveloped.

Thanks to a law passed in July 2016, Russia is the largest non-GMO territory in the world. Vladimir Putin wants Russia to become the world's largest organic producer. Russian legislation on organic products entered into force in 2020.

1- According to MENA, it is the poorest country in Europe and its population is largely rural.
2- The amount per farm is limited to € 10,000.

The state intervenes very little in the agricultural sector. 95% of investments are made by private actors. An *Organic Agriculture Research Institute* was created in 2016.

▸ Serbia started paying subsidies to organic farmers in 2004. Their amount was increased in 2020. An action plan to develop organic farming was launched in 2011. Currently, organic farming is included in the development program rural 2018-2020.
Organic farming was integrated into farmers' curricula in 2014. Several universities, including Belgrade and Novi Sad, are involved in organic farming (training and research). Public advisers provide information on organic farming. Since the 2012/2013 school year, organic farming has been taught in agricultural high schools as an option.

▸ In Switzerland, there are three kinds of subsidies: for conversion, for certification and for investment. Conversion subsidies began to be paid by some cantons in 1989. Since 1994, they have been administered by a federal program. Two cantons pay certification subsidies to organic farmers.
Since 1996, almost all agricultural schools have offered courses in organic farming.
The government financially supports *Bio Suisse* to promote Swiss organic products. *Bio Suisse*'s development goals are to reach 25% of the UAA grown organically and an organic share of 15% of the food market by 2025 (Avanti 2025 Strategy).
The Research Institute of Organic Agriculture, *FIBL*, was created in 1973. Its aims are to improve organic farming methods and to advise farmers. In particular, he carries out research on soils, varieties, animal welfare and climate change. It has a research and popularization activity aimed at developing countries. It has been analyzing the global organic agricultural sector for many years.
A platform[1] has been created to disseminate knowledge and exchange experiences between farmers, advisers and researchers in Europe. It is jointly managed by *FIBL*, *IFOAM EU* and *ICROFS*.
The Deputies of the *Grand Council of Neuchâtel* voted for a motion requiring agricultural and wine farms in the canton to convert to organic farming over the next 2 years (130 farms).

▸ In Turkey, the development of the sector was supported from 1995 with the creation of the *Ecological Agriculture Committee and the Ecological Agricultural National Steering Committee*. Research on organic farming began in 2002. The first law on organic farming was adopted in 2004 and the first organic regulation in 2005.
Turkey started paying subsidies to organic farmers in 2012. However, there are only paid after the first year of conversion.
Since 2004, the State television broadcasts each month a promotional or educational program of half an hour on organic farming.
Between 2013 and 2016, an action plan for organic farming was implemented. Its goals were the development of organic farming, the strengthening of controls, the improvement of traceability, the development of training and advice and the strengthening of institutional capacities. Currently seventeen research centers are active in organic farming. There are also about ten training courses about organic farming.
The Municipality of Izmir has helped farmers convert their farms to organic farming.

1- *https://organic-farmknowledge.org/*

▸ In Ukraine, developing the organic market is one of the priorities of the agriculture and rural development strategy for 2015-2020. The organic law was supposed to come into force in 2019, but it is not yet the case[1]. A national organic logo has been created.
For the moment, there is no national support, but regional ones. Some regions have budgets to provide organic certification assistance to producers.
A reflection is currently underway within the *Ministry of Agriculture* to increase the production and export of organic products, as well as to sensitize consumers to organic products. There has not yet been an official publication on the new government support for the period 2021-2023. However, the Ukrainian state is expected to pay subsidies to organic farmers during this period (certification subsidy and grant per hectare). The cost of purchasing inputs that can be used in organic farming[2] will be halved.

Organic Ukraine, the Public Union of Certified Organic Producers, with the support of *USAID*'s program, created the first organic export alliance in Ukraine to jointly seek a new market for value-added grain products: *Organic Ukraine Business Hub*. A fair dedicated to organic products is organized every September by the Organic Federation of Ukraine.

In North America

■ In the USA, support for organic farming mainly focuses on research, insurance schemes and partial coverage of certification costs. Organic farmers can benefit from the programs available for conventional agriculture in the Farm Bills, such as the one aimed at promoting environmentally friendly practices and the one concerning the development of farmers markets.
The 2018 Farm Bill supports organic farming. It established permanent mandatory funding[3] for the *Organic Agriculture Research and Extension Initiative* (*OREI*). The budget will increase from € 17.8 million in 2019 to € 44.5 million by 2023.
The 2018 Farm Bill provides full funding to the *Organic Data Initiative*, the *USDA*'s organic data collection program that provides market and production information for the organic industry. The 2018 Farm Bill directs the allocation of funds to states to support organic production and conversion. The funds must be allocated according to the number of certified and converting farmers in the state, as well as organic and converting areas. The certification assistance program was maintained. In addition, $ 5 million has been allocated for technology upgrades and data tracking for fraudulent organic imports, as well as increased enforcement power to combat fraudulent organic products from overseas. The electronic import certificate for organic products will become mandatory.
Training courses in organic farming are offered by several universities and by the *Rodale Institute*. *USDA* has launched an online organic farming learning center that provides free training for organic farming professionals. In July 2018, the State of Pennsylvania granted a

1- Not all official documents have been adopted yet.
2- Organic treatment products and organic fertilizers
3- Funding will no longer have to be negotiated every five years.

fund of € 437,000 to the *Rodale Institute* for research in organic farming. Its research priorities are to help farmers develop strategies to manage pests, soil fertility and crops, to help farmers to achieve the conversion of their farms, to enable farms to adapt better to environmental changes issues and study the links between soil health and human health.
In 2019, an innovative direct debit program was put in place. That year, organic players thus invested $ 1.5 million to advance projects around key actions: launch of an information campaign to reduce consumer confusion about organic farming[1] and a consumer study, connecting farmers with specialist technical advisers, training organic advisers and launching research on the benefits of organic farming for soil health and climate change mitigation. In 2020, the *Organic Trade Association* created the *Organic Council* to unify the diverse views of the organic industry and address current challenges. This will allow information to be shared within the sector and to reflect on regulatory issues.

■ In 1989, with its integrated intervention plan for organic farming, Quebec was the first province in Canada to provide government support for organic farming. Funds have been allocated to research and advice and the creation of organizations dedicated to the organic sector has been supported by the Quebec government.
At the federal level, the government has provided financial support to the *Organic Agriculture Center of Canada* at *Dalhousie University* since 2009 to implement several research programs within the framework of the *Organic Scientific Cluster*. It is industry-led and supports 37 Canadian research programs on production and processing.
A strategy for Canadian organic products has been developed by public and private actors, with funding from the federal government. A program to support the promotion of organic products for export has been set up.
Several Canadian universities offer training in organic farming.
The federal government wishes to develop employment in the Canadian organic sector.
The *Canadian Organic Producers Association* has launched a federally funded study to identify the risks associated with conversion and to make recommendations to limit them.
In 2019, the Canadian government decided to invest € 5.56 million in research on organic farming, nearly € 196,000 in updating organic standards and nearly € 680,000 in developing the domestic market and export.
In 2020, 79 Canadian researchers were working on organic farming.
In 2020, the Minister of Agriculture and Agri-Food of Canada announced a grant of more than € 409,400 for the *Canadian Organic Growers Association* to develop a strategy to develop organic production to satisfy more the domestic market[2].
In Quebec, there is a 200-ha research site dedicated to organic farming. In 2015, the provincial government decided to support companies converting to organic farming. It also financially supports the organic umbrella organization of the province. In 2018, the Quebec government decided to increase the support budget for organic farming. Its ambition is to

1- "Skip Chemicals" : This campaign continued in 2020.
2- This investment is made under the Canadian Agricultural Strategic Priorities Program, which is an investment of approximately € 32.2 million over five years to help the agricultural sector adapt and remain competitive.

reach 98,000 ha grown organically by 2025, i.e., a doubling compared to 2015. In this province, as part of the organic food policy for 2020-2025, a new campaign to promote organic products was born. It notably includes television advertisements and a dedicated Facebook page.
Ontario is preparing a new tool for knowledge sharing and decision making in organic farming. This is an online platform. It is expected to be launched in March 2021.
Canada has been organizing an organic week in September for over 10 years.

In Asia

■ In Asia, public support is more recent than in Europe. Many initiatives are taken to develop organic farming.

■ Participatory guarantee systems for organic farming are developing in Asia, mainly in India, the Republic of Korea, the Philippines and Thailand. In total, over 342,800 producers were involved in participatory guarantee systems in 2018 (including over 115,500 certified). India is the first country in the world for the number of organic farmers who are part of a participatory guarantee system (over 333,000 in 2018, including more than 113,000 certified). The federal government provides financial support for the development of participatory guarantee systems.

■ In 2017, *IFOAM Asia* had 220 members. It organized its third congress in September 2018.

■ *ALGOA*[1] is a project initiated by *IFOAM Asia* and which gathers 204 members in twenty Asian countries. It is about developing a territorial approach to organic farming. In September 2019, it hosted the International *Summit on Organic Agriculture Policy*.

■ The *Asian Committee for Innovation in Organic Agriculture* was launched in December 2019.

■ In Azerbaijan, a strategic roadmap for the national economy[2] was approved by the president in December 2016 and specifically includes the development of organic farming.
GABA is an NGO which was created in 2000 and whose mission is to promote organic farming. It informs farmers, through its monthly magazine. It also provides training[3]. He has been organizing organic events since 2005.
For several years, FAO has been working on the development of organic farming in Azerbaijan.
In October 2019, the *State Agricultural University* organized a conference on the development of organic farming in Azerbaijan.
There are plans to create pilot organic farms in all regions over the next few years.
There are no national regulations on organic farming.
GABA has prepared a national program on organic farming, but it has not been adopted yet by the government.

1- Asian Local Governments of Organic Agriculture
2- In 2020, over one million people were working in agriculture, i.e., about 40% of the working population.
3- Since its creation, over 2,000 farmers have been trained in organic farming methods and 332 have moved on to apply for organic certification of their products.

In 2019, an organic food festival was organized in the capital, Baku.

- In Bangladesh, the national organic regulation was adopted in 2016.

- In 2012, Bhutan[1] was the first country in the world to declare that it wanted to go completely organic. Policy support for organic farming started in 2003. From 2011, the *National Organic Agriculture Program* oversaw the development of a full range of policies and guidelines to support organic farming. Since 2008, over 3,300 farmers and 259 people from the *Ministry of Agriculture* have been trained in organic farming. Bhutan is still far from being fully organic, the organic share of the UAA was still under 2% in 2017. However, the goal behind this ambition of a 100% organic country is to promote organic farming in Bhutan to contribute to the marketing of smallholder agricultural products, poverty reduction and value creation for the tourism sector.
In 2017, the government of Bhutan realized that it was going to be impossible to reach 100% organic by 2020 and that there was a need to increase the budget dedicated to organic farming. A new development program has been put in place for the period 2018-2023. The goals are to achieve organic production of 254,000 tons by 2023, create around 1,500 new jobs and convert 33,000 farms to organic farming.

- The *Cambodian Organic Agriculture Association*, *CORAA*, is a national non-profit organization that works to promote organic farming in Cambodia. It gathers organizations and people who are active in organic farming, processing, marketing, trade and any type of support for organic farming.
In 2018, Cambodia published a roadmap to promote organic farming.
FAO has created several PGS in Cambodia to help small organic producers.

- In China, the federal government declared in 2017 that green development was one of the pillars of its development strategy. China wants to become the world leader in sustainable development and aims to become completely carbon neutral by 2060. The federal government has planned to develop training in organic farming. It also strengthened the audit of certification bodies.
Organic farming is also supported by provincial governments to improve food quality and safety, which are major public issues in China. There is currently a wide range of support for organic producers: certification assistance, land search support, financing of infrastructure and organic fertilizers, training and marketing assistance.
There is a network of 150 organic demonstration farms.

1- Only 8% of the territory of Bhutan is cultivable, however, 54% of the inhabitants of Bhutan in activity work in the agricultural sector.

In August 2019, China revised its regulations on organic products, which took effect in early 2020.
Lingqiu County in northern China's Shanxi Province has made efforts to explore the development of organic farming to reduce poverty.
Civil society efforts have also helped. A group of food lovers have set up "community supported" farms, farmers markets and buying clubs. This has contributed to a revolution of ecological food and ethical eating in Chinese cities.

■ In India[1], the federal government and many states support the development of organic farming. The federal government support began in 2001 with the launch of its national program for organic farming development. The goal was then to develop organic production for export. Various actions were carried out to promote the conversion of small farms and the development of the domestic market, such as the official recognition of participatory guarantee systems[2] and the launch of a national PGS or the creation of the national organic logo, *Jaivik Bharat*.
A campaign called "*Jeevani*" has been launched to promote organic farming. It will last 470 days from January 2020 to April 2021. The goal is to increase the general public's knowledge of organic products, especially in schools.
The *Ministry of Agriculture* and some state governments have opened stores to sell organic products.
In addition, since 2004, a network of 13 research centers located in several states have been working on organic farming.
Most Indian agricultural universities offer training in organic farming. A university dedicated to organic farming will even be created in Gujarat.
In 2003, the state government of Sikkim[3] announced its wish to go fully organic. It said this strategy could help preserve the ecosystem and citizens' health while providing socio-economic benefits, including helping young people stay on their land and creating sustainable tourism. Sikkim became fully organic at the start of 2016. 75,000 ha are thus grown organically. This earned him the first prize of the Future Policy Award from IFOAM. In addition, an organic farming research and training institute was established in 2016 in the capital, Gangtok.
The Kasargode district in Kerala has also gone completely organic. Other Indian states have ambitious goals for the development of organic farming. Uttarakhand[4] and Mizoram[5] also plan to become organic states. In 2019, the governor of Uttarakhand approved the organic farming law to make the state fully organic. In particular, the sale of chemical fertilizers will be regulated and the law provides for penalties for prohibited substances. The law will also help simplify the certification process.
The state of Nagaland is preparing a law on organic farming.
States like the Punjab have not launched any program dedicated to organic farming but have supported organic farmers by purchasing their crops through structures such as the *Punjab Agri Export Corporation* and selling them abroad.

1- In India, more than 40% of the working population works in the agricultural sector.
2- As of 2018, India recognizes PGS as equivalent to third party certification.
3- State of North-East India, very mountainous and with little agricultural land
4- The federal government has decided to invest € 20.5 million in the state of Uttarakhand to support organic farming.
5- However, only 1% of its areas were grown organically in 2017.

■ In Indonesia, the central government actively supports its 1,000 organic villages project. The province of Bali implemented a strategy in 2009 to gradually replace chemical fertilizers with organic fertilizers. Technical assistance is also offered to organic farmers. Other provinces have started to support the use of organic fertilizers. Thailand, Sri Lanka, China, Bhutan, Nepal, the Republic of Korea and Taiwan have also set up programs to promote the use of organic fertilizers.

■ Iran is working on an action plan to develop organic farming.
IOA is *the Iranian Organic Association*. It supports the actors of the sector in the development of organic farming in Iran.

■ In Israel, *IBOAA* was started in the 1970s by a farmer. Today it has around 500 members. It promotes organic farming. It is involved in many educational and humanitarian projects. This association works with the government.

■ The *Ministry of Agriculture of Japan* has set up a platform to support local governments in promoting organic farming.
The city of Kisarazu has declared itself the first organic city in Japan. A ten-year plan has been launched to develop organic production in the town.
Japan organized its first organic festival in December 2016. It has been held every year since. There are organic producers, restaurants and crafts.

■ In Jordan, the first development program for the organic sector took place between 2009 and 2014. The second covers the period 2018-2022. Its main goal is to convert conventional farms to organic. Several training courses on organic farming have been set up.

■ In Kazakhstan, a law on organic farming was passed several years ago, but its implementation is not complete.
In 2018, a first international conference on organic products in Kazakhstan was organized. It could become an annual event.
QOPUnion represents the organic producers of Kazakhstan.

■ In 2019, the government of Kyrgyzstan has passed a law on organic production and certification. This country has decided to support the organic sector to develop exports of organic products. It intends to completely convert his agriculture to organic by 2028. A national organic logo has been created.
So far, organic farming has mainly developed through private initiatives.
The *Federation for Biological Development*, *Bio-Kg*, was created in 2012. It organizes organic forums and fairs.

■ The Laotian government created in 2009 an organization which offers low-cost certification. In the capital, the *Ministry of Agriculture* supports an organic market which was created in 2006. It is now daily. As in Cambodia, *FAO* has created several PGS in Laos.

■ In Lebanon, support for organic farming started in the early 2000s. Two research stations dedicated to organic farming were created in 2014 and 2017. *MECTAT*[1] and *Greenline* are two organizations working to create an organic farmers and traders network and to promote organic food in Lebanon through training farmers and educating consumers.

■ In Malaysia, the government has set up a free national certification program: *MY Organic*. NGOs such as *CETDEM* organize organic events for interested farmers. They also run a business and consumer education and awareness program.
Organic Alliance Malaysia was created to facilitate sectoral cooperation and the development of organic farming in the country.

■ In Myanmar, a training program in organic farming was launched in 2010. The Association of Myanmar Organic Farmers, *MOPGA*[2], was created in 2013. This association and the *MFVP*[3] offer various services to organic producers including training and certification. These two organizations communicate little information about organic farming to the public.

■ In Nepal, support for organic farming started in 2004. Technical support for farmers was put in place from 2015. In 2019, the Nepalese government formed a working group on the promotion of organic farming, to develop a program proposal to guide the development of the sector in the years to come.

■ The first action plan for the development of organic farming in the Philippines was launched in 2012. The government has been providing certification assistance to organic operators since 2012. A fund to help organic farmers develop organic production and to meet the development of the local market has recently been established. Since 2010, *Benguet University* has offered organic training. It was followed by other universities. Since 2013, the government has supported the installation of 49 stores where it is possible to buy both organic inputs and organic food products.
Over 120 mayors have invested in the development of organic farming[4]. They have been organized in the *League of Organic Agriculture Municipalities and Cities of the Philippines* since 2012. This organization notably supports the development of organic farming by offering a free 4-week training course on this topic for family farms and municipalities.
For 14 years, an *Organic Farmers Festival* has been organized on Negros Island in the Visayas region, with the support of the local government.
An *Under Secretary for Organic Agriculture* was appointed in 2019.
In 2020, the Philippine government recognized certification under PGS.

■ The Republic of Korea has been providing subsidies to organic farmers since 1999. Its project is to develop research in organic farming through the creation of research centers spread across the country. Their roles will notably be to develop organic farming techniques, train farmers, educate consumers and set up demonstration farms.
The Republic of Korea promotes organic farming in the fight against climate change.

1- Middle East Center for the Transfer of Appropriate Technology
2- Myanmar Organic Growth Production Association
3- Myanmar Fruits, Vegetables, Production and Export Association
4- This represents 8% of towns and agglomerations.

The County of Goesan is the one with the greatest concentration of organic farmers. Organic farming has been strongly integrated into the politics of this county.

- In the Middle East, Saudi Arabia is the country where government support for organic farming is the most developed. A research center dedicated to organic farming was created in 2009. Its mission is also to advise and train organic farmers. The *Ministry of the Environment* regularly organizes workshops on organic farming for farmers and processors. It also financed and co-organized two information campaigns on organic farming intended for the public.
As part of its support program for organic production, the *Saudi Arabian Ministry of Agriculture* allocated € 385,000 of subsidies to farmers between September 2018 and April 2019.
In recent years, the government has launched new initiatives to develop local organic production as Saudi Arabia is heavily dependent on imports.

- In Sri Lanka, the *Bureau for Export Development* plans for 2019 to help the *Ministry of Agriculture* to put in place organic regulations and to create a national base of organic farmers[1].

- The Taiwan Agriculture Council plans to triple the areas grown organically. Training programs in organic farming and advisory services have been implemented.

- In Tajikistan, NGOs raise awareness of the benefits of organic farming.

- In Thailand, the *University of Maejo* converts its plots to organic farming and has created an organic center where students and employees can buy organic products. In 2015, the *Ministry of Trade* funded a study on the Thai organic market.
A national action plan was finalized in April 2017. This five-year strategy aims to increase organic agricultural productivity and develop organic products from Thailand, so that they are recognized more widely among local and international consumers. The government especially supports the development of organic rice production (for export). The Thai government is also involved in the development of participatory guarantee systems. The government encourages the introduction of organic products in catering.
In 2021, an organic farming support plan with more than € 50 million should be implemented to launch 209 agricultural projects.

- In Vietnam, there is an organic farming development project for 2020 to 2030 to advance national production, as well as organic aquaculture. The goals are to achieve 2% of the UAA grown organically, 2% of farm products and 1.5% of aquaculture production. The project also aims to improve organic yields, diversify organic production, develop certification bodies and increase processing.
A program is underway to develop the supply of organic vegetables to Ho Chi Minh City[2].
Hanoi wishes to extend the practice of organic farming in its territory. Several farms in the capital already produce organic vegetables. One of them provides it to schools.

1- In 2016, Sri Lanka declared that it wished to become a pesticide-free nation within 3 years.
2- Formerly known as Saigon, it is Vietnam's largest city and its economic heart. Its population is 7.4 million.

The *Vietnamese Association for Organic Agriculture*[1] provides training to producers.

In Latin America

■ In May 2017, the 7th *Organic Meeting in Latin America* took place. Producers, searchers and representatives of the public sector and organic organizations came together to discuss challenges and exchange information. The first meeting on Biodynamics of Latin America was organized in Peru in July 2017. It gathered people from Mexico, Puerto Rico, Ecuador, Brazil and Peru. This allowed them to exchange information and create a network.

■ The *Inter-American Commission for Organic Agriculture*, *CIAO*, was created in 2008. It is made up of 19 countries in America[2]. It is part of the *Inter-American Institute for Cooperation in Agriculture* (*IICA*). The *CIAO* has four strategic areas of action: facilitating trade and market development of organic products, strengthening national control systems, promoting organic production and disseminating information and knowledge on organic farming.
In 2016, it drew up a plan for organic farming by 2030 in cooperation with the various member countries. The goal is to give a new and strong impetus to the development of organic farming, for a sustainable and inclusive growth favorable to the economies of the member countries.

■ In Latin America, state support is still relatively limited. It mainly concerns the development of regulations on organic farming. The other supports are more recent and often only date from the beginning of the 21st century. These are more government programs or initiatives rather than a real policy supporting organic farming.

■ Training courses in organic farming, in universities especially, have been set up in most Latin American countries.

■ Participatory guarantee systems are also developing in Latin America, especially in Bolivia, in Brazil and in Peru. More than 23,400 producers were involved in PGS in Latin America in 2018, of which over 18,200 were certified. Brazil was the first country to recognize participatory guarantee systems as equivalent to certification by a certifying body. In 2018, over 5,400 Brazilian organic farmers were certified organic through a participatory guarantee system. Bolivia is the second country in the world after India for the number of organic producers certified by PGS (over 8,100 producers in 2016).

■ Several Latin American countries have created a national organic logo, including Argentina, Bolivia, Brazil, Chile, Ecuador, Mexico, Paraguay and Peru.

1- VOAA

2- Argentina, Brazil, Bolivia, Chile, Colombia, Costa Rica, Ecuador, El Salvador, United States, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Dominican Republic, Uruguay and Venezuela. Canada has participated in assemblies as an observer. In 2017 and 2018, Spain and Portugal respectively joined the Commission as permanent observer members.

■ The Argentine *Movement for Organic Production*, *MAPO*, was created over 20 years ago. It is an NGO. Its goals are to promote organic production, to communicate on the advantages of this production system and of organic food, to ensure the quality and transparency of organic markets and to be the voice of the Argentinian organic sector.
In Argentina, the *Ministry of Agriculture and Food Industry* has been supporting research in organic farming since 2011. The agricultural research center, *INTA*, works also on organic farming. The first university training course on organic farming began at the start of the 21st century.
Organic Farming Week takes place in December every year.
There is an *Advisory Commission on Organic Agriculture*. It is chaired by the *Ministry of Agriculture*.
In 2020, the *Ministry of Agriculture* announced a strategic plan for organic farming by 2030. Its goals are to stimulate research, encourage private investment and promote the structuring and organization of the organic sector, strengthen the presence of organic production in institutional frameworks, develop organic production and processing and develop exports and the domestic market.

■ In Belize, *Pro-Organic Belize* is the organization in charge of the development and promotion of organic farming. It developed a PGS. It also manages a subscription system for organic baskets.
An organic fair is held every year in the fall in Belmopan.

■ In Brazil, an organic week has been organized every year in June since 2005.
In 2009, the *National Program for School Meals* instituted the obligation to use 30% of the budget dedicated to public food purchases to buy products from family farms and preferably organic. Late 2017, 40 million students were benefiting from this program. In 2012, the Federal government launched a national program to promote agroecological and organic farming practices. The planned actions are loans at advantageous rates, financial support for research institutes and universities, technical assistance and an organic premium for public purchases. A promotion campaign "*Organic and Sustainable Brazil*" was set up in 2014 by the *Ministry of Social Development and the Fight Against Hunger*, during the *FIFA World Cup*.
Since 2009, the *National school catering program* has set the goal of using at least 30% of products from family farms, with a preference for organic products. This program has made it possible to develop conversions and democratize access to organic products. In 2016, the municipality of Sao Paulo decided that, by 2026, the meals served in schools should be completely organic[1].
Organis is an organization which represents the interests of the Brazilian organic sector. It gathers farmers, processors, cooperatives, associations and entrepreneurs in an institutional effort to promote Brazilian production, identify business opportunities in the global market and encourage the consumption of organic products in Brazil.
The *Instituto Brasil Orgânico* was created on October 3, 2019 with the main aim of representing, promoting, protecting and encouraging the Brazilian organic movement.

■ In Bolivia, an organic production development program was launched in 2014.

1- 2 million meals are served in this municipality each year.

ORGANIC SECTOR IN THE WORLD

■ The Chilean association of organic producers *Tierra Viva, Agricultores Organicos* was created some 20 years ago. It is a PGS accredited by the Chilean state since 2008. Its purpose is to organize organic farmers to meet local demand and supply local markets.
A strategic plan has been implemented for the Chilean organic sector for the period 2010-2020.
There is a technology transfer group on organic arboriculture.
The 3rd organic sector seminar was organized in November 2020.
In 2020, a first fully organic cooperative, *Organicoop*, was created. A significant part of the profits from this will be allocated to research and development.

■ In Colombia, there is no national development strategy nor promotion of organic farming.

■ In Costa Rica, a public certifying body certifies organic producers free of charge, however, the number of inspectors is limited. Conversion subsidies have been paid to organic farmers since 2007.
The *Ministry of Agriculture* and the *Association of Organic Producers* are currently developing an application to facilitate the connection between sellers and buyers of organic products.
A national organic farming development plan is being drawn up.
VAT on organic food products should soon be reduced to 1% of the price excluding tax.
A Master's degree in organic farming will start in 2021.
ANAO is the national association for organic agriculture. It promotes organic farming in Costa Rica. It is also involved in training.

■ The Cuban government began to support organic farming in the 90s. Research in the organic sector is highly developed there. The *University of Havana* set up an organic course at the same time.

■ In Dominican Republic, the *National Confederation of Agricultural Producers* announced in 2020 that an action plan to support the organic sector was being drawn up.

■ In Ecuador, 3 virtual days to promote the consumption of organic food were organized by *Agrocalidad Ecuador*[1] in September 2020. These webinars were intended for producers, consumers, academics and traders of organic products and other actors in the production chain.

■ In Guatemala, there is a *National Strategy for the Development of Organic and Agroecological* Production 2013-2023. It aims mainly to develop organic production.

■ In Jamaica, *JOAM*[2] was created in 2001 with the aim of developing a sustainable and economically viable organic sector. It is an NGO run by volunteers. *JOAM* organizes training. It also contributed to the establishment of 8 organic demonstration farms.

1- Agency for the regulation and control of phytosanitary and zoo-sanitary products
2- Jamaica Organic Agriculture Movement

- In Mexico, State support is provided for training, technical assistance and certification. Organic farming development plans have also been implemented in some states (e.g., Zacatecas, Chiapas, Oaxaca and Mexico City). *SAGARPA*, the national authority for the organic sector, is trying to develop the domestic market.
The *National Council for Organic Agriculture*[1] is a forum for consultation which advises the various federal authorities on organic farming. Its roles are also to work for the development and promotion of organic farming.
A trade fair dedicated to organic, *Exporganánica*, is organized every year.
In 2020, Mexico updated its organic regulatory framework.
The Secretariat for Agriculture and Rural Development and the *National Council of Organic Producers* are working on the development of a new development program for the organic sector by 2024. One of the goals should be the development of the national organic market.

- Since 2017, Panama has benefited from a public certification system.

- In Paraguay, a national organic farming development program was launched in 2010.

- In Peru, most of the development of the organic sector has been carried out by the private sector.
In 2008, the law for the promotion and promotion of organic/ecological agriculture was approved. In 2011, by mandate of this law, the *National Council of Organic Agriculture*[2] and 23 regional councils for organic production have been created.
A national plan for the promotion of organic farming by 2030 was prepared in 2019 by CONAPO, regional governments and *RAE Perú*. It has not yet been approved by the *Ministry of Agriculture*.
There are over 30 weekly organic fairs in Peru. Each year, an organic seminar is organized during Expoalimentaria, an important agricultural fair. Organic products are also presented[3].
RAE Perú promotes organic products to Peruvian consumers.
Peru launched the first Latin American Degree in biodynamics in 2018.
The regional government of Piura has been providing financial support to organic banana producers since 2015.

- In Uruguay, an organic farming development program started in 2013. On the other hand, there is currently no national development policy for the organic sector.

In Oceania

- In Australia, there is little direct support to the sector. There is federal subsidies dedicated to organic research and development.
A national logo for organic products has recently been launched. It is now recognized by more than half of Australians.
In September 2020 took place the 7th week of promotion of Australian organic products.

1- CNPO
2- CONAPO
3- Without specific promotion

ORGANIC SECTOR IN THE WORLD

An organic farming research center has recently been established at *Southern Cross University*. This university has been offering a Graduate Certificate in Organic Food and Nutrition since 2020, as part of its new *National Center for Naturopathic Medicine*.
Australian Organic[1] is a non-profit organization that protects and promotes the Australian organic industry. It has established a strategic plan for the organic sector for the period 2019-2023. The goals are to promote certified organic products, to protect consumer rights and the integrity of the sector, to identify the needs of organic production and processing and to meet them.
National Farmers Federation backs *Australian Organic*'s request to Australian government for domestic regulation[2].
In September 2020, the Tasmanian Minister of Primary Industries and Water announced a new program to stimulate the growth of organic production there.

- In New-Zealand, the government generally does not intervene in the agricultural sector. However, a bill on organic products was prepared in 2020. The goals are to increase consumer confidence when purchasing organic products, to increase the regulation of companies making claims on organic products and to assist the international trade of New Zealand organic products.

- *POETCom*, the Oceania Community for organic farming and ethical trade, was created in 2012. It organizes training in organic farming. It has drawn up a strategic plan for 2013-2017. Its goals are to promote greater recognition of organic farming, to ensure food and nutritional security for Pacific Islanders and to expand the economic possibilities of producers. A new strategic plan is being developed and should be released soon. *POETCom* plays an important role in the development of participatory guarantee systems for organic farming in Oceania [3]. *POETCom* has set itself a priority project for 2020 to improve the provision of knowledge on organic farming to farmers. An organic logo recognized by 22 Pacific countries and territories has been created: *Organic Pasifika*. An organic farming toolkit has been put online to help decision-makers.

- Cicia Island, in Fiji, has become totally organic since 2014.

- The *University of the South Pacific*, located in Fiji, offers training in organic farming.

- In Samoa, the government bears the cost of certification of organic farmers.

- Vanuatu aims to become fully organic by 2020.

1- Formerly Biological Farmers of Australia. The name change took place in 2012.
2- There is only a regulation for organic products intended for export.
3- The first Oceanic PGS was created in New Caledonia in 2010.

■ Participatory guarantee systems are developing in Oceania. The rate of growth of this type of certification is faster than that of traditional certification (certification by a third party). According to *POETCom*, twelve participatory guarantee systems were fully operational in 2018 in Fiji, Vanuatu, French Polynesia, Cook Islands, Solomon Islands, New Caledonia and Samoa and another was under development in Kiribati. These twelve PGS included over 2,000 certified organic farmers and over 1,000 in conversion. Vanuatu and Fiji were the two countries in Oceania where organic certification by PGS was the most developed in 2018.

In Africa

■ In 2011, the heads of state and governments of the *African Union* took the decision to promote organic farming on the African continent. The *African Union* Commission has trained 90 producers and exporters in Africa. A strategic plan to develop and promote organic farming has been drawn up for the period 2015-2025.

■ *AfrONet*[1] is the umbrella organization for the African organic sector. It was created in 2012. Its role is to strengthen and support organic networks in Africa and to promote organic farming practices.

■ The fourth African conference on organic farming was organized in 2018 by *AfrONet* in Senegal. A recommendation was made to all member countries to intensify their efforts to generate and disseminate information to advance organic farming and to propose solutions that could facilitate the participation of financial institutions in improving access to financing for organic companies. The next conference is expected to take place in 2021 in Morocco.

■ There is also a research network in organic farming: *NOARA*. It was launched in 2009. In 2019, it had over 200 members in 16 African countries and 3 countries outside of Africa. Its roles are to lead research in organic farming, to make science popularization, to do market research, to have a lobbying role in favor of research dedicated to organic agriculture, to promote organic farming in Africa and to provide management and administrative advice to like-minded programs and partners in the field of organic farming research. In 2019 and 2020, *NOARA* worked to develop a research agenda for Africa by 2030.

■ The *Ecological Organic Agriculture Initiative* (*EOA-I*) was launched in response to the call from *African Union* Heads of State and Government to promote organic agriculture in Africa. Its overall goal is to integrate organic farming into national farming systems by 2025 to improve the quality of life for all African citizens.

■ The *IIABA* project[2] aims to accelerate the development of organic farming in Africa. It was launched in February 2019 for a period of three and a half years. Coordinated by *AfrONet*, the project partners[3] intend to facilitate the advent of institutional innovations to promote the organic sector on the continent. The actions are taking place in three countries: Morocco, Uganda and Tanzania. The project is funded by *AFD* to the tune of € 1.5 million.

1- i.e., African Organic Network
2- Institutional Innovations for Organic Agriculture in Africa
3- Including CIRAD & INRAE

■ The Poles of Scientific and Endogenous Knowledge in West Africa (*KCOA*) project started late 2019. It will last five years. The goal is to capitalize on local knowledge in ecological and organic agriculture collected from producers and then disseminate it throughout the sub-region. This project brings together about sixty participants from Gambia, Benin, Nigeria and Senegal, representatives of the government of Senegal, German partners of *BMZ*[1]/*GIZ* (project funders), the *Economic Community of the States of West Africa*, *IFOAM* and *FENAB*. This project will follow an action-research approach.

■ The *Organic Market For Development* (*OM4D*) project is funded by the *Dutch Ministry of Foreign Affair*s and implemented by *IFOAM* and the *Louis Bolk Institute* in partnership with *CNABio*. It covers three West African countries (Burkina Faso, Ghana & Togo) and São Tomé and Principe for a period of four years (2017 - 2021). This project aims to create opportunities for the integration of poor populations in national and international organic markets and adapting them to new local and global challenges such as inequality, climate change, scarcity and depletion of natural resources. *OM4D* is taking advantage of the opportunity of a growing demand for organic products to make them a motor of development by improving the living conditions of small farmers. The goals are to make organic institutions competent so that they facilitate the growth of the organic sector, to stimulate local food systems in favor of local organic markets, to develop the supply of organic products at the local level through the increase of areas and to promote national and international policies in favor of the development of the organic market with the inclusion of the poor.

■ Recently, participatory guarantee systems are developing rapidly in Africa, particularly in Uganda, Tanzania, Kenya and Burkina Faso. In total, nearly 17,800 farmers were involved in PGS in 2018 and 4,650 of them were certified. In 2018, Uganda had over 2,200 organic farmers certified by PGS.

■ In October 2020, the Algerian Minister of Agriculture and Rural Development announced the creation of a body to promote products from organic farming across the country. It will make it possible to control products from organic farming and to avoid any related problem.

■ Since 2014, Benin has had a platform for organic and ecological agriculture: *PABE Benin*. Especially, it organizes training for farmers.
There is also a Beninese organization for the promotion of organic farming: *OBEBAP*. This NGO works for sustainable development by emphasizing the enhancement of local resources and the development of sustainable agricultural production systems, the preservation of the health of farmers and consumers and the protection of the environment.

■ In Burkina Faso, organic farming has been developing for about thirty years. Burkina Faso is one of the most active countries in the field of organic farming in West Africa. It is the professionals, sometimes assisted by NGOs[2], who have enabled the development of organic farming. There is no state subsidy for organic farmers.
CNABio, National Council for Organic Agriculture, is an association created in 2011 which promotes and develops organic farming. It has 65 members (associations, farmers'

1- BMZ is a company.
2- A NGO provides subsidies to farmers in conversion.

organizations, NGOs, businesses, farmers, researchers, etc.). Organic training, particularly to produce vegetables, is organized by the *CNABio*. It visits and advises its members. He also carries out advocacy and lobbying activities with the authorities. To remedy the problem of the high cost of international certifications, the *CNABio* has set up the Burkinabe organic standard and a certification guide. It has developed a participatory guarantee system to certify products intended for the local market.
It is only in the last decade that organic research and training have developed.
Many farmers search the internet for information on organic farming.
Some events are organized to promote organic products and raise awareness among the population. However, they are organized irregularly and are insufficient to provide consumers with real knowledge of organic products.

■ In Burundi, there is no national organic farming development program. It is possible to find organic products at fairs. There are no specifically organic organized events.
BOAM[1] was established in 2011. It promotes organic farming in the country. It has 25 members.

■ In Cameroon, *ASPABIC*[2] was created in 1997. This association began by carrying out work to popularize organic farming on a local radio station. It continues to promote organic farming. It also provides technical support for the creation and monitoring of the organic plots of its members. It also puts organic operators in touch with each other. At the start of 2020, *ASPABIC* had 23 active members.

■ In the Democratic Republic of Congo, the *Congolese Organic Agriculture Network* is an NGO whose roles include promoting organic farming, representing the organic sector, facilitating the implementation of laws and regulations, providing advice techniques in the field of production, certification and marketing of organic products, coordinate all activities relating to organic certification, ensure compliance with organic standards, attract donors and investments in the field of organic farming and to participate in the implementation of public policies in favor of organic farming.

CEDAP[3] is a non-profit organization founded in 1995. It aims to contribute to socio-economic development, including the promotion of agriculture and organic practices and gender equality in the eastern regions of the DRC . Its mission is to help farmers and communities become the engines of their own development by lifting themselves out of poverty through organic farming and participatory projects.

■ In Egypt, a research center specific to organic farming has been created. Three Cairo universities offer training programs on organic farming.
The *German Ministry of Economic Cooperation and Development* is funding a project aimed at increasing the competitiveness of organic farmers and processors in Egypt. This includes

1- Burundi Organic Agricultural Movement
2- Association for the Promotion of Organic Agriculture in Cameroon
3- Center for Development and Promotion of the Democratic Republic of Congo

especially training and technical support for organic farmers and the promotion of organic products.

■ In Kenya, there has been a training center dedicated to organic farming since 1986. *KOAN*[1] was created in 2005. This network gathers organic producers, exporters, traders, NGOs, as well as other organizations. *KOAN* coordinates the organic sector and promotes the social, economic and environmental benefits of organic farming. It helps organic farmers find business opportunities and offers them training.
K*IOF*[2] is an NGO which carries out a training activity in organic farming.
Besides, the County of Busia is supporting the installation of an organic fertilizer production plant.

■ In Liberia, there is no national policy to develop organic farming. There are no events organized to promote it. However, discussions have been initiated between the different stakeholders to launch a development process.

■ In Madagascar, SYMABIO has represented the organic sector since 2011. It currently gathers more than sixty operators in the sector mainly focused on exports.
The first participatory guarantee systems have been set up around the capital Antananarivo with the support of international NGOs.

A first law on organic farming was promulgated in July 2020. It is the result of two years of consultation between the private sector, competent ministries (agriculture, environment, trade, health), agricultural organizations, NGOs, certification and research. This law reflects the strategic ambition of the Malagasy government to support the growth of organic exports, as well as to promote the development of its national organic market. The text contains commitments in favor of organic research, technical support, the promotion of organic territories in the country and measures to mitigate chemical contamination of organic value chains. A National Commission for Organic Agriculture was created under this law. It is an advisory body representing private and public stakeholders, which will play a role in the implementation of the national organic law and related programs. The law established the framework for developing a national organic standard, for use by farmers wishing to produce for the local market. It also recognized the equivalence of other organic standards, those already used for export, so that products certified to these standards will continue to be marketable as organic products on the domestic market. Another strength of this organic law is that it encourages the participation of smallholder farmers in the sector by recognizing participatory guarantee systems as a valid means of certification for the domestic market. The next steps will be the development of additional legislation, including the national organic standard and the development of the first national organic strategy for organic farming (with its related action plans at national and regional levels). The development of

1- Kenya Organic Agriculture Network
2- Kenya Institute of Organic Farming

this strategy, called SNABio, began in 2020. 2021 should see the launch of the first stages of it.

■ In Mali, there are occasional and seasonal subsidies for organic producers. The *Ministry of Agriculture* does not promote organic products yet. On the other hand, some NGOs support organic farmers. A small organic fair was created by the *RESAPAC network*: *TRÈS ORGANICS.*
MOBIOM[1] was created in 2002. It gathers 76 cooperatives of organic farmers.

■ In September 2015, the *Ministry of Agro Industry and Food Security of Mauritius* has signed a cooperation project with FAO to develop organic farming there. The goals are to improve the legislation and train farmers, researchers and technicians, to develop the production, processing and marketing of Mauritian organic products.
In 2019, the government announced its ambition to make Mauritius organic. Certification costs for organic operators should be borne by the state.
The *Food and Agriculture Research and Extension Institute* has a department dedicated to organic farming.

■ In Morocco, the first support program for organic research and training was launched in 1997. The contract-program for the development of the organic sector in Morocco runs for the period 2011-2020. It covers research and training, technical assistance and the marketing of organic products. The goals are to reach 40,000 ha grown organically, 400,000 tons of production (including 60,000 t for export), to create 35,000 permanent jobs and for the sector's turnover to be € 72 million.
In 2011, the Moroccan government signed a contract with the organic industry, represented by *AMABIO*[2], to support research and develop production.
FIMABIO[3] is the Moroccan inter-branch body of the organic sector. It replaces the *AMABIO*. It was created in 2016 as part of the organization of the sectors specified by Law 12-03. It gathers organic associations. Its missions are to contribute to the development strategy of the organic sector in consultation with all the actors of the sector, to popularize the organic specifications, to promote good practices in terms of organization, protection and preservation of the environment among professionals of the sector, strengthen communication and promotion actions for organic products at national and international level and strengthen partnership actions with other organizations concerned with the development of the organic sector in Morocco and internationally. It has been recognized as the spokesperson for the organic sector. *FIMABIO* is trying to improve the marketing of Moroccan organic products inside the country. It is also setting up demonstration farms with Swiss cooperation.
Organic farming has a prime position in Morocco's new agricultural strategy for 2030. The goals are to reach 100,000 ha and a production of 1 million tons. Six levers for the sector have been recorded: certifying de facto organic crops, training producers, improving the accessibility of organic inputs, reducing certification costs, bringing out national champions and creating territorial bridges of excellence for organic cultivation.

1- Malian Organic Movement
2- Moroccan Association of the organic production sector until 2016
3- Moroccan Interprofessional Federation of the Organic Sector

Moroccan organic regulations, which were promulgated in 2013, have been applied since 2020.
The *Moroccan Organic Entrepreneurs Club*[1] has signed an agreement with the Moroccan Federation of Consumer Rights to educate consumers about the strengths of organic products and to encourage and monitor the evolution of organic consumption on the national and international market.
The *National School of Agronomy* has a course in organic farming. It also has a research activity. The *Hassan Agronomic and Veterinary Institute* also has research and training activities in organic farming but seems less involved than *ENA*.
The first edition of the Salon *Bio Expo Maroc* took place in June 2019 in Casablanca and welcomed over 10,000 visitors.

■ In Mozambique, there is no public policy to develop organic farming.

■ In Namibia, the *Namibian Organic Association* gathers a group of producers and consumers with a common desire to develop the organic sector in Namibia.
The association promotes the efficient production of organic products through capacity building, training, education, extension and research. There are no national organic regulations in Namibia, but only private specifications put in place by *NOA*. *NOA* operates a participatory guarantee system. It has a trademark. NOA helps market organic products locally and internationally.
It serves as a voice for the organic industry in Namibia and internationally. It also aims to create a spirit of cooperation between the various players in the organic industry. It also seeks to increase awareness of organic farming in Namibia.

■ In Niger, there is no national strategy for organic farming. On the other hand, a group of organic producers was formed to set up a PGS. Now, it has around 30 farmers. The areas concerned are quite limited for the moment. In addition, organic farmers from Niamey have organized themselves into an economic group *Bori, Bella, Bani*[2]. Their first general assembly was held in 2020. Their first step is to develop organic production around Niamey.

■ In Nigeria, the organic sector is just starting to develop. There are no subsidies for organic producers yet. An organic export development program has been designed to start by the end of 2020. Part of the program's provisions is to subsidize the training and certification of organic producers and processors. The certification body *Nicert* organizes seminars to connect organic producers and processors with international buyers.
NOAN[3] is an NGO created to coordinate all stakeholders involved in organic farming in

1- CEBIO
2- "Beautiful, Good, Organic"
3- Association of Organic Agriculture Practitioners of Nigeria

Nigeria. It also acts as a link with international players in the sector. It organizes conferences on organic farming.

■ In the Republic of Congo, the mayor of Pointe-Noire[1] launched a project in 2020 to develop organic vegetables cultivation in the Mbota Bissongo district.

■ In Rwanda, *ROAM*[2] was created in 2007. It works to raise public awareness, share information within the sector, support organic farmers and advocate for the adoption of public policies in favor of organic farming. In 2019, it launched the *Rwanda National Organic Agriculture Platform* in partnership with the *Ministry of Agriculture*. Its role is to serve as a forum for discussion for multiple stakeholders in the organic sector and it should make it possible to create a synergy between its members.

■ In May 2020, the Minister of Agriculture of Sao Tome and Principe signed a public-private partnership protocol entitled "Sao Tome and Principe 100% Organic" aimed at guaranteeing the food and nutritional security of the country by the production of quality foods of high nutritional value for local and export markets. The main goals are to promote sustainable local food production, to enhance the production, processing, marketing and consumption of organic products, to inform local agents of the economic, cultural and social importance of these products and to increase the exchange of experiences with other African countries.

■ In Senegal, *FENAB*[3] was created in 2008. Its missions are to change mentalities in the direction of the promotion of natural products, restore soil fertility, restore the balance of ecosystems, fight against the disappearance of biodiversity and climatic disturbances, preserve and improve human, animal and plant health, promote the emergence of organic farming jobs (especially among young people), promote the activities of small farmers and strengthen their role.
There is no subsidy for organic farmers.

■ In Seychelles, the development of a regulation on organic farming started in 2020. It is expected to take about two years.

■ In South Africa, government commitment to organic farming is weak. There are no subsidies for organic farmers[4]. A national benchmark on organic farming has been under study for more than 10 years. Unfortunately, it remains in draft form.
SAOSO[5] is working to unite the country's organic farmers. In 2018, it published a private specification, recognized by *IFOAM.* There are also many PGS in South Africa.

1- South West of the country
2- Rwanda Organic Agriculture Movement
3- National Federation of Organic Agriculture of Senegal
4- Besides, South African organic farmers are having difficulty obtaining loans from banks.
5- South African Organic Sector Organization

In 2020, *Ecocert South Africa* and *USAID Southern African Trade and Investment Hub* hosted a free webinar on organic farming. In 2019, *Ecocert* also organized a symposium on organic wine. A large exhibition on organic and natural products was scheduled for May 2020 but had to be canceled due to the pandemic.

■ In Tanzania, *Tanzania Organic Agriculture Movement* was created in 2005. It is an NGO. Its goal is to coordinate and promote the development of organic farming in Tanzania, through networking and dissemination of information. *TOAM* currently has 115 members: associations and cooperatives of farmers, NGOs, organic farmers, processors, distributors, researchers and trainers.

■ In Togo, *ANA-Bio Togo* is a non-profit association which aims to defend the rights of organic operators and promote the organic sector.
The Togolese Union for Organic Agriculture is a Simplified Joint Stock Company whose purpose is to serve as an Interbranch framework for Togolese organic farming by mobilizing the human, material, technical, financial and logistical resources necessary to strengthen the intervention capacities of the various affiliated multi-sector actors to enable them to achieve their respective goals with a view to promoting sustainable organic agriculture and fair trade.
Currently, the *Ministry of Agriculture* is developing several development programs in partnership with the organic sector.
Organic fairs and demonstration events of organic farming techniques are organized in Togo.

■ Tunisia is the African country where government support for organic farming is the strongest. In 1999, a technical center for organic farming was created and certification subsidies began to be paid. The first development plan for organic farming was launched in 2004. The current action plan covers the period 2016-2020. The goals are to create organic sectors, biodistricts, organic tourist routes and to finance studies. This strategy aims to make the link between organic and other complementary sectors such as agritourism and crafts.
Organic farming has been integrated into public continuing education for over a decade through the Technical Center for Organic Agriculture and the *Regional Commissariats for Agriculture.*
There are subsidies on investments up to 50%[1]. An annual bonus is also paid for five years in respect of the State's participation in the costs of control and certification of organic production up to 50%. The costs of analysis and testing of specific inputs are also supported at 50%. Moreover, organic farmers benefit from a suspension of customs duties and VAT on some inputs specific to organic farming.
To attract local or foreign investors to invest their money in the Tunisian agricultural sector, the state totally exempts them from income taxes for 10 years, then allows them to benefit from a 10% tax exemption.
In 2010, the government launched a week of Tunisian organic products.
UNObio, a new union that gathers organic farmers, processors and distributors, was created in October 2019. The goal is to provide qualitative sustainable organic farming and to limit the impact of consumption on natural resources, including land, water and biodiversity. This union also aims to improve the national infrastructure for organic farming, by optimizing the

1- It concerns the equipment, tools and means specific to organic production.

roles of the different actors. The nine union members plan to work with existing organizations to restructure the organic market by improving supply and sales channels.
In October 2020, *UNObio* signed a contract with the *Swiss Embassy in Tunis*, for the realization of a digital platform project for organic professionals in Tunisia. The two partners plan to develop, subsequently, a network of operators and a virtual market for organic products in addition to sharing experiences and know-how.

■ In Uganda, *National Organic Agriculture Movement Uganda*[1] was created in 2001. It is an umbrella organization that gathers farmers, processors, exporters, NGOs and other institutions and organizations involved in the promotion and development of the organic sector in Uganda. It organizes organic events as part of the *IIABA* project.
There is no subsidy for Ugandan organic producers.
In 2020, the Minister of Agriculture launched a national policy for organic farming. The overall goal is to harness Uganda's organic agricultural potential by ensuring a well-regulated and coordinated sub-sector that contributes to national development.

1- NOGAMU

Conclusions: SWOT analysis of the global organic sector

		STRENGHTS	WEAKNESSES	OPPORTUNITIES	THREATS
Production	Production		Difficulties in obtaining bank loans in lots of countries	Development of the use of plant varieties and animal breeds suitable for organic production	Lack of working-force due to the pandemic
			Lack of availability of high quality organic agricultural inputs in some countries		
	Training		Teaching of organic practices not developed in all countries	Development of accessibility to information available through the Internet	
		Lots of organic training in the EU		Development of organic training	
	Advice	Support structures in many countries	Not sufficiently developed in some countries		
	Certification		Certification costs often too high	Development of certification under PGS	
	Incomes	Increase in income		Fight against poverty	
				Development of fair trade in organic sectors	
	Structuration	Organic sector not sufficiently organized in many countries		Development of contractualisation	
Processing	Processing		Few processing tools in some countries	Development of processing tools	

		STRENGHTS	WEAKNESSES	OPPORTUNITIES	THREATS
Distribution	**Distribution channels**			Diversification of distribution channels	
				Innovations in the distribution of organic products	
				Evolution of food distribution in many countries	
	Supermarkets	Development of the organic range			Price war
	Organic shops and organic supermarkets		Weakening in some countries	New concepts	
	E-commerce	More organic products online, in proportion, than in physical stores.		Development beneficial to that of the organic market and its democratization.	
	Catering	Allow to promote organic products to young people	Loss of sales with the closure of restaurants and canteens		Catering with organic reserved for the richest in some countries
					Restaurant bankruptcies due to pandemic closures
	Trade		Trade hampered by the pandemic		

		STRENGHTS	WEAKNESSES	OPPORTUNITIES	THREATS
Consumption	**Perception of organic products**	Good image	Image of an expensive, even luxurious product	Development of the promotion of organic products	
			Poor knowledge of organic products and organic farming in lot of countries	Explaining more why organic products are more expensive	
	Demand		Concentrated in North America and Europe	Request not fully satisfied	Economic crisis linked to the pandemic
				Development of demand outside North America and Europe	Different growth rates for supply and demand
			More developed in cities	Development of organic subsistence crops in parallel with those intended for export	
	Demographic developments			Strong interest of the younger generations (Y and Z) for organic products	
	Behavioral changes			Wish to buy healthy products accentuated by pandemic	
				Growth of the food safety criterion	
				Environmental protection: growing choice criterion	
				Growing desire to cook for part of the population	
				Wish to buy more local products	
				Research into waste reduction (packaging and food)	

		STRENGHTS	WEAKNESSES	OPPORTUNITIES	THREATS
Regulation		Regular review and strengthening of organic regulations in some countries	Many different standards globally	Possible reconciliation of regulations from several countries	Negotiation of new trade agreements by the EU
Political support	**General**	Benefits of organic products increasingly recognized by public authorities			
	Operators	Help conversion	Still insufficient, or even non-existent in some countries	Diversification of support	
				Current or forthcoming sector support programs in many countries	
	Consumers	Promotion and education on organic products		Multiplication of communication tools	
	Research			Development of political support	
Organic organizations		Many NGOs and associations involved in the organic sector	Lack of coordination in some countries		

Areas grown organically and number of organic farms in the world in 2018

Countries	Areas grown organically (ha)	Change 2018/2017	Share of the UAA grown organically	Organic Farms Number	Change 2018/2017	Average area by farm	Area ranking	Organic share ranking	Organic farms ranking
Afghanistan	786	189,00%	0,00%	10	400,00%	79	132	161 ex aequo	143
Albania	747	36,00%	0,06%	82	34,40%	9	134	135 ex aequo	118
Algeria (areas : 2017 & farms: 2016)	772	nd	0,00%	64	nd	nd	133	161 ex aequo	120
Andorra	2	0,00%	0,01%	1	0,00%	2	167 ex aequo	148 ex aequo	155 ex aequo
Argentina	3 629 968	7,20%	2,44%	1 366	18,10%	2 657	**2**	48	78
Armenia	694	-51,50%	0,04%	35	-2,80%	20	135	139 ex aequo	129
Australia	35 687 799	0,10%	8,78%	1 829	-8,50%	19 512	**1**	22	72
Austria	637 216	2,80%	24,70%	23 478	1,80%	27	14	**3**	19
Azerbaijan (2015)	37 630	nd	0,79%	305	nd	123	72	75	102
Bahamas (2016)	49	nd	0,35%	1	nd	49	155	98 ex aequo	155 ex aequo
Bangladesh (farms: 2011)	504	-93,70%	0,01%	9 335	nd	nd	138	148 ex aequo	33
Belarus	1 656	23,70%	0,02%	24	nd	69	120	146 ex aequo	132
Belgium	89 000	6,70%	6,60%	2 256	7,80%	39	52	28	67
Belize	220	-42,20%	0,14%	150	-81,70%	1	145	117 ex aequo	110 ex aequo
Benin (farms: 2017)	16 454	-13,10%	0,44%	4 030	nd	nd	87	91 ex aequo	53
Bhutan	6 632	0,00%	1,26%	4 354	1,40%	2	106	64	51
Bolivia (2014)	114 306	nd	0,30%	12 114	nd	9	47	101 ex aequo	32
Bosnia and Herzegovina	896	-29,60%	0,04%	251	-17,40%	4	130	139 ex aequo	108
Botswana	nd	nd	nd	2	nd	nd	nd	nd	152 ex aequo
Brazil	1 188 255	4,50%	0,42%	17 508	0,20%	68	12	94	24
Bulgaria	162 332	18,80%	2,60%	6 213	-4,00%	26	42	45 ex aequo	40
Burkina Faso (2017)	56 663	nd	0,47%	26 627	nd	2	62	90	18
Burundi	164	97,40%	0,01%	16	-54,30%	10	148	148 ex aequo	139
Cambodia	27 550	149,50%	0,51%	5 788	-14,40%	5	77	87 ex aequo	43
Cameroon	1 089	0,00%	0,01%	499	0,00%	2	128	148 ex aequo	96
Canada	1 311 572	10,10%	2,01%	5 791	20,60%	226	11	52	42
Cape Verde	495	0,00%	0,59%	1	0,00%	495	139	83 ex aequo	155 ex aequo
Chad	nd	nd	nd	1	nd	nd	nd	nd	155 ex aequo
Channel Islands (2016)	180	nd	1,89%	nd	nd	nd	147	54	nd
Chile	16 305	-16,00%	0,10%	1 609	260,80%	10	88	125 ex aequo	75
China (farms: 2016)	3 135 000	3,70%	0,61%	6 308	nd	nd	**3**	82	39
Colombia	22 314	-12,70%	0,05%	3 496	46,00%	6	81	137 ex aequo	62
Comoros	2 142	48,20%	1,61%	680	-55,80%	3	117	59	91
Cook Islands	24	-4,00%	1,60%	58	190,00%	0,4	160	60	122
Costa Rica (areas: 2010 & farms: 2017)	8 964	nd	0,49%	50	nd	nd	100	89	123

ORGANIC SECTOR IN THE WORLD

Countries	Areas grown organically (ha)	Change 2018/2017	Share of the UAA grown organically	Organic Farms Number	Change 2018/2017	Average area by farm	Area ranking	Organic share ranking	Organic farms ranking
Croatia	103 166	6,80%	6,90%	4 374	8,70%	24	48	27	50
Cuba (farms: 2016)	6 181	-0,10%	0,10%	510	nd	nd	107	125 ex aequo	94
Cyprus	6 022	7,20%	4,60%	1 249	6,30%	5	108	32	80
Czech Republic	519 910	4,80%	14,80%	4 601	4,00%	113	17	11	49
Democratic Republic of Congo (areas: 2017)	60 624	nd	0,23%	30 170	-28,70%	nd	60	107	15
Denmark	279 299	13,90%	10,50%	3 794	4,30%	74	27	15	56
Dominica (2011)	240	nd	0,96%	nd	nd	nd	144	71	nd
Dominican Republic (areas: 2016)	169 026	nd	7,19%	16 119	-45,00%	nd	41	26	26
Ecuador	41 793	0,00%	0,75%	12 912	3,40%	3	69	76	28
Egypt	116 000	9,50%	3,10%	970	0,00%	120	46	40	86
Estonia	210 033	5,00%	20,60%	1 948	3,20%	108	35	5	71
Eswatini	186	-0,20%	0,02%	2	0,00%	93	146	146 ex aequo	152 ex aequo
Ethiopia	186 155	0,00%	0,51%	203 602	0,00%	1	39	87 ex aequo	**3**
Falkland Islands	31 937	0,00%	2,88%	4	0,00%	7 984	74	41	148 ex aequo
Faroe Islands	251	-0,70%	8,37%	1	0,00%	251	143	23	155 ex aequo
Fiji	41 154	147,90%	9,68%	67	-95,90%	614	71	17	119
Finland	296 645	14,70%	13,10%	5 039	8,00%	59	24	14	47
France	1 981 853	13,50%	7,34%	41 623	13,40%	48	7	25	9
French Polynesia	1 512	1,40%	3,32%	12	-52,00%	126	122	37	141 ex aequo
Gambia (farms: 2017)	20	-1,00%	0,00%	1	nd	nd	162	157 ex aequo	155 ex aequo
Georgia (2015)	1 452	nd	0,06%	1 075	nd	1	123	135 ex aequo	84
Germany	1 521 314	10,80%	9,10%	31 713	7,90%	48	10	21	14
Ghana (farms: 2017)	29 663	94,20%	0,19%	3 228	nd	nd	75	112 ex aequo	63
Greece	492 627	20,10%	9,30%	29 594	6,40%	17	18	19 ex aequo	16
Grenada	84	-1,20%	1,10%	23	-4,20%	4	152	67 ex aequo	133 ex aequo
Guatemala (2014)	14 000	nd	0,37%	6 346	nd	2	90	97	38
Guinea (2017)	10	nd	0,00%	1	nd	10	164	167 ex aequo	155 ex aequo
Guinea-Bissau	835	0,00%	0,05%	1	0,00%	835	131	137 ex aequo	155 ex aequo
Haiti	4 403	-21,20%	0,24%	4 661	107,70%	1	116	105 ex aequo	48
Honduras (2017)	29 274	nd	0,90%	6 023	nd	5	76	72	41
Hungary	209 382	4,90%	3,90%	3 929	7,90%	53	36	36	54
Iceland	24 855	23,20%	1,33%	29	-12,10%	857	79	62	130 ex aequo
India	1 938 221	8,90%	1,08%	1 149 371	5,10%	2	9	69 ex aequo	**1**
Indonesia (farms: 2017)	251 631	21,00%	0,44%	18 162	nd	nd	30	91 ex aequo	23
Iran (areas: 2017)	11 916	nd	0,03%	20	-99,50%	nd	94	142 ex aequo	136

Countries	Areas grown organically (ha)	Change 2018/2017	Share of the UAA grown organically	Organic Farms Number	Change 2018/2017	Average area by farm	Area ranking	Organic share ranking	Organic farms ranking
Iraq	63	4,20%	0,00%	nd	nd	nd	154	163 ex aequo	nd
Ireland (farms: 2017)	118 699	59,70%	2,60%	1 725	nd	nd	45	45 ex aequo	73
Israel	6 666	1,50%	1,24%	349	4,20%	19	105	65	100
Italia	1 958 045	2,60%	15,50%	69 317	3,80%	28	8	8	7
Ivory Coast (farms: 2017)	50 574	0,30%	0,20%	2 776	nd	nd	63	110 ex aequo	64
Jamaica	374	0,00%	0,08%	127	0,00%	3	141	133 ex aequo	114
Japan	10 792	8,40%	0,24%	3 678	72,70%	3	97	105 ex aequo	58
Jordan (2017)	1 446	nd	0,14%	23	nd	63	124	117 ex aequo	133 ex aequo
Kazakhstan	192 134	-25,20%	0,09%	63	231,60%	3 050	38	131 ex aequo	121
Kenya	154 488	-10,30%	0,56%	37 295	-17,10%	4	44	85	12
Kingdom of Tonga	685	-56,90%	2,07%	1 060	-22,30%	1	136	51	85
Kirghizstan (farms: 2017)	22 118	14,40%	0,21%	1 107	nd	nd	82	108 ex aequo	81
Kosovo (areas: 2015)	160	nd	0,04%	150	50,00%	nd	149	139 ex aequo	110 ex aequo
Kuwait	22	8,50%	0,01%	1	-50,00%	22	161	148 ex aequo	155 ex aequo
Laos (areas: 2016 & farms: 2011)	7 668	nd	0,32%	1 342	nd	nd	104	100	79
Latvia (farms: 2017)	280 383	4,30%	14,50%	4 178	nd	nd	26	12	52
Lebanon	1 241	-8,30%	0,19%	111	3,70%	11	126	112 ex aequo	115
Lesotho	1	nd	0,00%	3	nd	0,3	169	169	150 ex aequo
Liberia	2	nd	0,00%	nd	nd	nd	167 ex aequo	167 ex aequo	nd
Liechtenstein	1 413	1,70%	38,52%	46	2,20%	31	125	**1**	126
Lithuania	239 691	2,40%	8,10%	2 476	-0,10%	97	31	24	65
Luxembourg	5 782	6,20%	4,40%	103	0,00%	56	110	33	116
Madagascar	48 757	-23,80%	0,12%	32 367	47,60%	2	65	120 ex aequo	13
Malawi	12 399	1,40%	0,21%	295	9733,30%	42	92	108 ex aequo	104
Malaysia	9 576	1488,00%	0,12%	29	-75,60%	330	99	120 ex aequo	130 ex aequo
Mali (2017)	12 655	nd	0,03%	12 272	nd	1	91	142 ex-aequo	31
Malta	47	14,60%	0,40%	19	46,20%	2	156	95	137
Maroc	9 917	8,10%	0,03%	277	138,80%	36	98	142 ex aequo	106
Mauritius	3	-81,90%	0,00%	22	0,00%	0,1	165 ex aequo	157 ex aequo	135
Mexico	183 225	-72,80%	0,17%	27 000	-87,10%	7	40	116	17
Moldavia	17 151	-43,10%	0,70%	135	18,40%	127	86	78 ex aequo	112
Mongolia	636	nd	0,00%	13	nd	49	137	163 ex aequo	140
Montenegro	4 455	64,10%	1,93%	328	6,50%	14	114	53	101
Mozambique	14 933	18,70%	0,03%	269	3742,90%	56	89	142 ex aequo	107
Myanmar	12 305	20,10%	0,10%	48	200,00%	256	93	125 ex aequo	124

Countries	Areas grown organically (ha)	Change 2018/2017	Share of the UAA grown organically	Organic Farms Number	Change 2018/2017	Average area by farm	Area ranking	Organic share ranking	Organic farms ranking
Namibia	66	32,00%	0,00%	8	-33,30%	8	153	166	144
Nepal	11 851	26,60%	0,30%	1 622	65,00%	7	95	101 ex aequo	74
Netherlands	71 351	27,00%	3,20%	2 010	18,50%	35	57	39	70
New-Caledonia (2017)	94	nd	0,10%	131	nd	1	150 ex aequo	125 ex aequo	113
New-Zealand	88 871	0,00%	0,80%	876	0,00%	101	53	74	89
Nicaragua	34 787	3,50%	0,69%	8 193	-18,60%	4	73	80	35
Niger (2017)	254	nd	0,00%	2	nd	127	142	163 ex aequo	152 ex aequo
Nigeria	57 117	7,00%	0,08%	1 091	0,40%	52	61	133 ex aequo	83
Niue	43	-73,80%	0,86%	1	-96,30%	43	157 ex aequo	73	155 ex aequo
Norway	46 377	-1,40%	4,66%	2 057	-0,60%	23	67	31	68
Oman (areas: 2015 & farms: 2013)	43	nd	0,00%	5	nd	nd	157 ex aequo	157 ex aequo	146 ex aequo
Pakistan	64 885	26,50%	0,18%	415	1560,00%	156	58	115	97
Palestine (farms: 2017)	4 870	-8,10%	1,63%	1 440	nd	nd	111	58	76
Panama	5 929	-60,90%	0,26%	18	-98,60%	329	109	104	138
Papua New Guinea	49 573	262,50%	4,17%	12 742	-0,10%	4	64	35	29
Paraguay	42 818	-2,00%	0,20%	5 187	-91,10%	8	68	110 ex aequo	46
Peru	311 461	-1,30%	1,28%	103 554	16,70%	3	22	63	5
Philippines	218 570	16,90%	1,76%	12 366	256,40%	18	33	56	30
Poland	484 676	-2,10%	3,30%	19 207	-5,20%	25	19	38	20
Porto Rico (2016)	14	nd	0,01%	5	nd	3	163	148 ex aequo	146 ex aequo
Portugal	213 118	-16,00%	5,90%	5 213	11,50%	41	34	29	45
Republic of Kiribati (2017)	1 600	nd	4,71%	900	nd	2	121	30	88
Republic of Korea	24 700	19,30%	1,41%	15 500	20,20%	2	80	61	27
Republic of Macedonia	4 409	52,00%	0,35%	775	19,20%	6	115	98 ex aequo	90
Romania	326 260	26,20%	2,40%	8 518	7,70%	38	21	49	34
Russia	606 975	26,50%	0,28%	40	17,60%	15 174	16	103	127
Rwanda	2 130	66,90%	0,12%	3 870	-57,00%	1	118	120 ex aequo	55
Salomon Islands	4 714	20,00%	4,37%	1 098	-9,50%	4	112	34	82
Salvador	1 679	0,10%	0,10%	380	-0,80%	4	119	125 ex aequo	98
Samoa	97 656	-8,20%	34,51%	2 038	-0,70%	48	50	**2**	69
Sao Tomé and Principe	10 934	24,50%	22,45%	3 564	0,00%	3	96	4	60
Saudi Arabia	18 631	9,10%	0,01%	6	-95,90%	3 105	85	148 ex aequo	145
Senegal (2013)	7 989	nd	0,09%	18 369	nd	0,4	103	131 ex aequo	21
Serbia	19 255	43,40%	0,55%	373	-93,80%	52	84	86	99

ORGANIC SECTOR IN THE WORLD

Countries	Areas grown organically (ha)	Change 2018/2017	Share of the UAA grown organically	Organic Farms Number	Change 2018/2017	Average area by farm	Area ranking	Organic share ranking	Organic farms ranking
Seychelles	nd	nd	nd	1	nd	nd	nd	nd	155 ex aequo
Sierra Leone	99 238	-1,90%	2,51%	304	-83,50%	326	49	47	103
Singapore	3	nd	0,39%	nd	nd	nd	165 ex aequo	96	nd
Slovakia	192 143	1,60%	9,59%	535	21,90%	359	37	18	92
Slovenia	47 542	2,90%	10,00%	3 741	3,10%	13	66	16	57
South Africa	82 818	265,70%	0,10%	237	-40,20%	349	54	125 ex aequo	109
Spain	2 246 475	7,90%	9,30%	39 505	4,80%	57	4	19 ex-aequo	10
Sri Lanka	77 169	-19,90%	2,82%	1 416	-83,70%	54	55	43	77
Sudan	76 941	-40,80%	0,11%	3	-98,60%	25 647	56	123 ex aequo	150 ex aequo
Suriname	94	64,10%	0,11%	39	3800,00%	2	150 ex aequo	123 ex aequo	128
Sweden	609 104	5,60%	20,20%	5 654	1,10%	108	15	6	44
Switzerland	160 992	6,30%	15,39%	7 032	5,90%	23	43	9	37
Syria (2010)	19 987	nd	0,14%	2 458	nd	8	83	117 ex aequo	66
Taiwan	8 759	15,70%	1,10%	3 556	11,60%	2	102	67 ex aequo	61
Tajikistan	8 806	79,00%	0,19%	953	-9,20%	9	101	112 ex aequo	87
Tanzania (areas: 2017 & farms: 2010)	278 467	nd	0,70%	148 610	nd	nd	28	78 ex aequo	4
Thailand	95 066	4,20%	0,43%	58 490	53,40%	2	51	93	8
Timor Leste	63 882	104,20%	16,81%	4	33,30%	15 971	59	7	148 ex aequo
Togo (2017)	41 323	nd	1,08%	38 414	nd	1	70	69 ex aequo	11
Tunisia	286 623	-6,50%	2,85%	7 456	3,00%	38	25	42	36
Turkey	646 247	24,10%	1,68%	79 563	6,00%	8	13	57	6
Uganda (2016)	262 282	nd	1,82%	210 352	nd	1	29	55	**2**
Ukraine	309 100	7,00%	0,72%	501	64,80%	617	23	77	95
United Arab Emirates (2017)	4 687	nd	1,21%	95	nd	49	113	66	117
United Kingdom	474 000	-8,40%	2,70%	3 619	0,30%	131	20	44	59
United States of America (farms: 2017)	2 023 430	-0,40%	0,59%	18 166	nd	nd	6	83 ex aequo	22
Uruguay	2 147 083	14,10%	14,86%	12	140,00%	178 924	5	10	141 ex aequo
Uzbekistan	943	nd	0,00%	1	nd	943	129	156	155 ex aequo
Vanuatu	25 648	72,40%	13,72%	47	-98,80%	546	78	13	125
Vietnam	237 693	309,70%	2,19%	17 169	69,20%	14	32	50	25
Virgin Islands (USA) (2016)	26	nd	0,65%	nd	nd	nd	159	81	nd
Zambia	1 228	176,00%	0,01%	286	7050,00%	4	127	148 ex aequo	105
Zimbabwe	415	29,70%	0,00%	511	-74,50%	1	140	157 ex aequo	93
Total	**71 480 470**	**2,90%**	**1,50%**	**2 794 814**	**-5,20%**	26			

Sources : FIBL/IFOAM/Many European sources

Glossary

African Union : It is an organization of African states created in 2002.

Citrus greening disease: It is a fatal bacterial disease of citrus. It is widespread in Asia and Africa. The pathogen is transmitted by two insects of the *Psyllidae* family.

Coffee orange rust: A fungal disease originating in East Africa that has colonized all coffee growing regions of the world, except the Hawaiian Islands. It is caused by *Hemileia vastatrix*, a basidiomycete fungus.

Commonwealth of Independent States : It is an intergovernmental entity made up of 9 of the 15 former Soviet republics, namely: Azerbaijan, Armenia, Belarus, Kazakhstan, Kyrgyzstan, Moldova, Uzbekistan, Russia and Tajikistan.

Economic Community of West African States (CEDEAO): This is a West African intergovernmental organization created on May 28, 1975. It is the main structure intended to coordinate the actions of the countries of West Africa. Its role is to promote cooperation and integration with the aim of creating a West African economic and monetary union. In 1990, his power was extended to the maintenance of regional stability. It now has fifteen Member States.

Equivalence Agreements: This type of trade agreement between two countries allows standards, rules and methods that differ between them to be treated as if they were the same (without each country having to modify them), provided they produce the same results and that they aim for the same goals, even if the means employed are different.

Europe : European Union, Albania, Andorra, Armenia, Belarus, Bosnia Herzegovina, Georgia, Faroe Islands, Iceland, Kosovo, Liechtenstein, Moldova, Montenegro, Norway, Republic of North Macedonia, Monaco, Russia, San Marino, Serbia, Switzerland, Turkey, Ukraine and Vatican.

European Union: It counts 28 countries in this report because it mainly concerns 2018 and 2019.

Farm Bill: This is US federal law approved by Congress. It sets agriculture and food programs and policy. It is updated approximately every five years. The Farm Bill is also known as the "Agriculture Improvement Act". The last Farm Bill was signed in December 2018.

Fonio: This is a gluten-free cereal, native to tropical West Africa. This cereal is eaten in porridge or whole grains like rice, or in the form of couscous. It can also be used to make beer (tchapalo).

Generation Y: Also called "Millennials", it gathers people born between 1980 and 2000.

Generation Z: Also called "new silent generation" or "generation C" for Communication, Collaboration, Connection and Creativity, it starts from the early 2000s until today. This generation has always known a world with a large presence of computers and the Internet.

GIZ: Deutsche Gesellschaft für Internationale Zusammenarbeit is the German international development cooperation agency. It sits in Bonn.

IAF: IFOAM Apiculture Forum. It was created in 2015.

Milk quota system: This was a policy of rights to produce implemented in France, then in the EU, within the framework of the CAP, from 1984, to limit and stabilize milk production (milk from cow) which was then strongly in surplus, to counter the collapse of the price. Each year a milk production limit was set by Member State. This was then distributed among producers according to an organization specific to each country. This system was abolished in April 2015.

Moringa: This is the *Moringa olifeira*, the most cultivated species of Moringa. It is originally from India and Sri Lanka. Its young pods and leaves are used as vegetables. The seeds are used as medicinal plants.

Middle East: It designates at least the following countries: Palestine, Jordan, Iraq, Israel, Syria, Turkey, Lebanon, Saudi Arabia, Yemen, Oman, United Arab Emirates, Qatar, Bahrain, Kuwait and Egypt. The Islamic Republic of Iran, Pakistan and Afghanistan are often added.

NOP: In the United States, the National Organic Program is the body that controls food from organic farming, under the aegis of the United States Department of Agriculture. This organization is responsible for awarding the "USDA organic" label.

OMSCO: Organic Milk Suppliers Cooperative

OREI: The Organic Agriculture Research and Extension Initiative helps solve critical problems in organic farming through research, education and extension activities and improve the competitiveness of organic and converting producers.

Countries equivalent to the European Union for organic regulations: Australia, Argentina, Israel, Switzerland, New Zealand, Costa Rica, India, Tunisia, Japan, Canada, the States United, the Republic of Korea and Chile.

Perennial crops: Also called permanent crops. They stay in place for at least 2 consecutive years.

PGS: Participatory Guarantee Systems. These are locally oriented quality assurance systems. They certify farmers based on the active participation of the actors concerned and are built on a basis of trust, networks and knowledge exchange. They jointly choose a common set of standards for organic farming and a set of procedures and appoint a coordinating body.

Permanent meadow: This is an herbaceous plant cover that has been established for at least ten years. It is characterized by a great wealth of spontaneous plant species in ecological balance under the joint effect of the environment and agricultural practices.

REKO: It means REttferdig KOnsum, or "fair consumption". It started in 2013 in Finland and then spread to other countries like Sweden and Norway. Local producers use Facebook groups to advertise which products are for sale and consumers can then order directly on Facebook. The aim is to free oneself from sales intermediaries while creating an efficient delivery system through which producers and consumers can meet. Consumers pay for their order directly at the delivery locations, which are generally located in the city center for easy access. Delivery points are strategically chosen so that there are no rental costs. Some supermarkets even offer to host a REKO for free to attract more customers. The products are seasonal, locally produced and sold at reduced prices as there are no costs for packaging, transport, advertising, or sales intermediaries. Contact with consumers allows producers to have feedback on the products and their methods. There is no waste for the farmer because only the ordered products are harvested.

Retailer brands: Also called private labels. They are popular with consumers because they generally have lower prices than other brands. They also allow distributors to collect more margin. According to *LSA*, private labels allow you to differentiate yourself, to convey the values of the brand, to build customer loyalty and to have an accessible offer.

Third country/ies: Country/ies outside the European Union

TRACES: Trade Control and Expert System. Online management tool from the European Commission which centralizes all health requirements and tracks the movements of animals and embryos, as well as foodstuffs, sold or imported into the European Union. The TRACES system was established by Commission Decision 2004/292/EC in application of Council Directive 90/425/EEC.

UAA: The Utilized Agricultural Area is a statistical concept intended to assess the area devoted to agricultural production. It is made up of arable land (field crops, market gardening, artificial meadows, fallow land, etc.), areas still in grass (permanent meadows, mountain pastures) and perennial crops (vines, orchards, etc.). It does not include woods and forests.

United Arab Emirates: Federal state made up of seven emirates: Abu Dhabi, Ajman, Sharjah, Dubai, Fujairah, Ras el Khaimah and Umm al-Quwain. Its capital is the city of Abu Dhabi.

USDA: United States Department of Agriculture. It is responsible for designing and implementing federal policy on agriculture, food and forestry. It is the equivalent of a Ministry of Agriculture.

Varroa: This mite parasitizes bees and is one of the possible or contributing causes of honeybee colony collapse syndrome.

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INTERNATIONAL PUBLICATIONS BY AGENCE BIO

French version : December 2020
English version : March 2021

ORGANIC SECTOR IN THE WORLD

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