



**Wed**

**12 Feb**

**15:00-16:30**

# **Global Organic Market Overview**





## The World of Organic Agriculture 2025 Latest Statistics About Organic Agriculture Worldwide

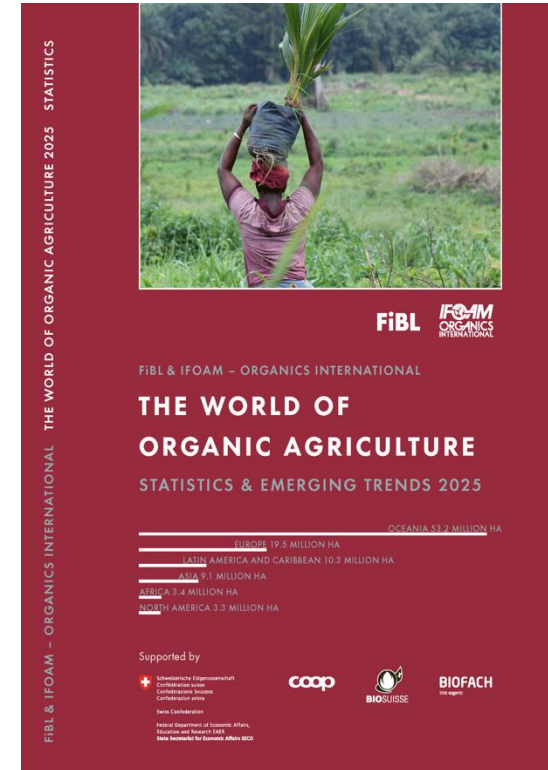
Helga Willer, Jan Trávníček, Bernhard Schlatter  
Research Institute of Organic Agriculture (FiBL), Frick, Switzerland  
The Global Organic Market, BIOFACH Congress 2025

February 12, 2025

# The World of Organic Agriculture 2025

- The 26<sup>th</sup> edition
- Data tables
- Country and continent reports
- Markets, standards, policy support
- The book can be ordered or downloaded at <https://www.fibl.org/en/shop-en>
- [www.organic-world.net](http://www.organic-world.net)
- <https://statistics.fibl.org>

**FiBL**



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Education and Research EAER  
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**BIO SUISSE**

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into organic

**IFOAM**  
ORGANICS  
INTERNATIONAL

More than 200 experts from all parts of the world contributed to the survey 2025.

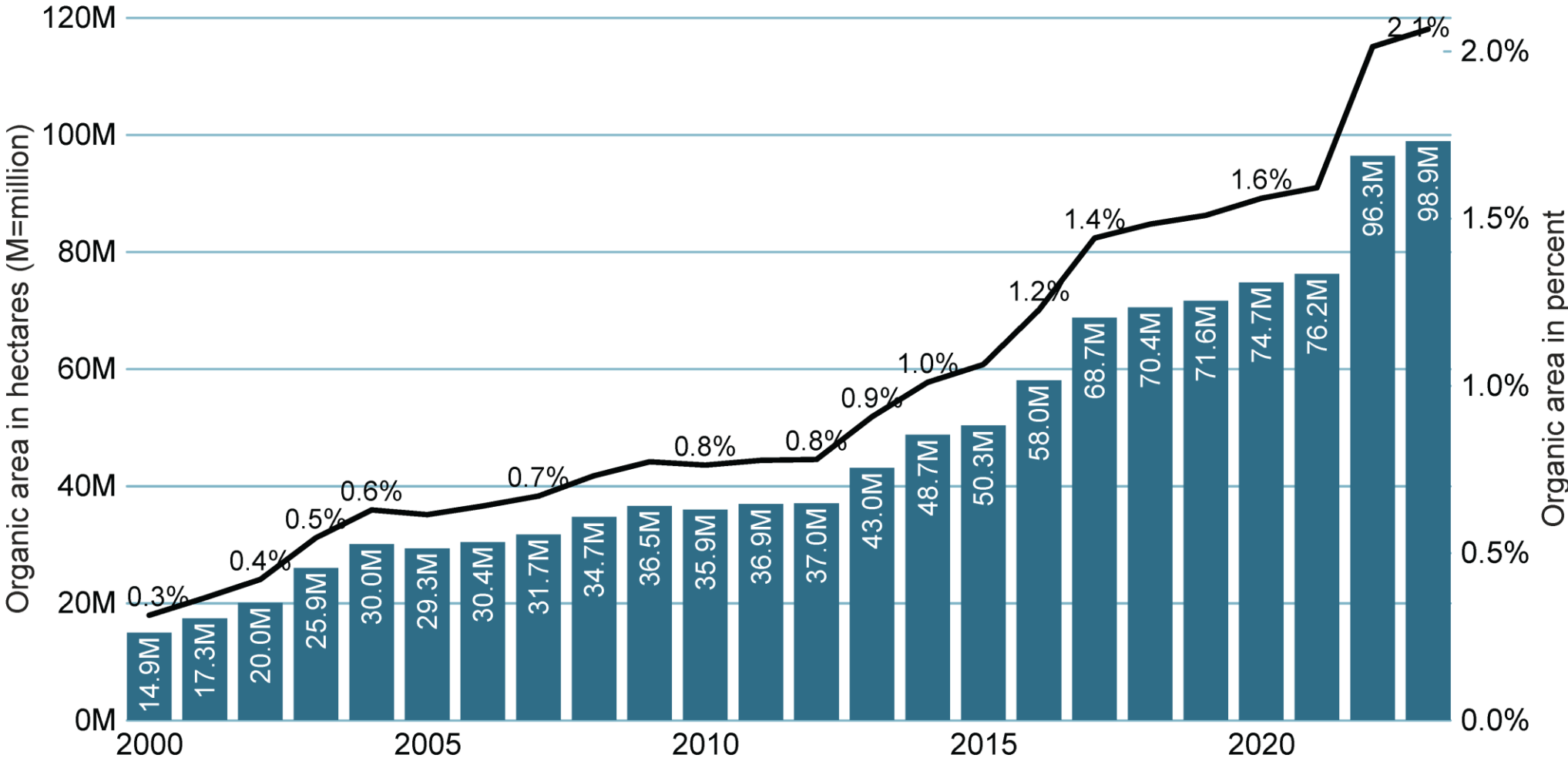
## Highlights 2023

- **Organic farmland** worldwide continued to grow, mostly single-digit.
- **The number of organic farms** worldwide decreased slightly after the exceptional increase in 2022.
- **Organic imports:**
  - EU: Decrease
  - USA: Strong increase
- **Market development: Recovery**
  - Increases in many European countries and in other parts of the world.
  - A two-year comparison on a global scale is not possible due to strong exchange rate fluctuations between the Euro and US Dollar.
- **Out-of-home consumption:** Notable increases in Europe.



# World: Growth of organic agricultural land and organic share 2000 - 2023

Source: FiBL-IFOAM-SOEL surveys 2001-2025

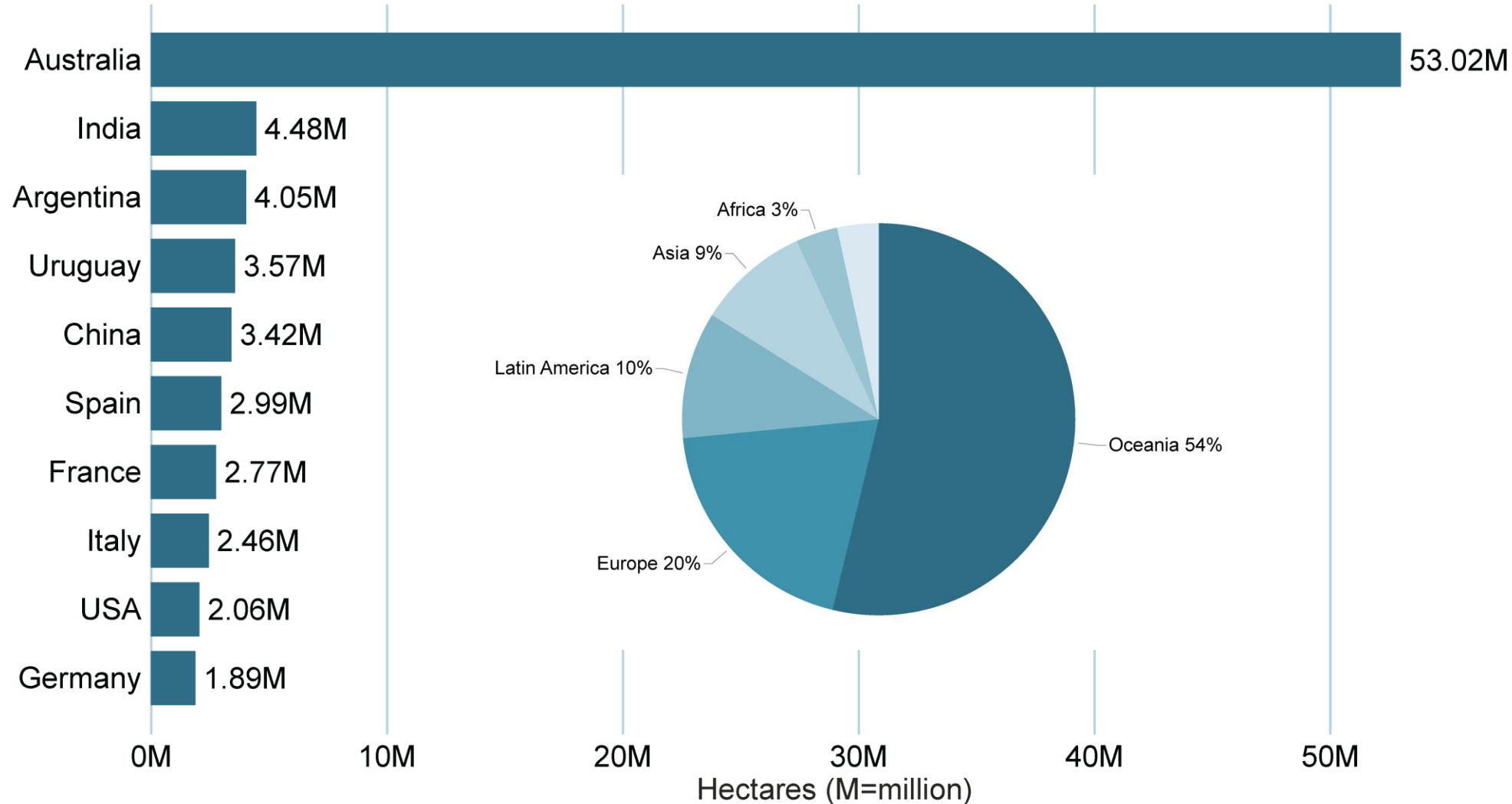


**Organic farmland 2023: 98.9 million hectares or 2.6% (2.5 million) more than in 2022.**

**Largest increases: Uruguay, China and Spain**

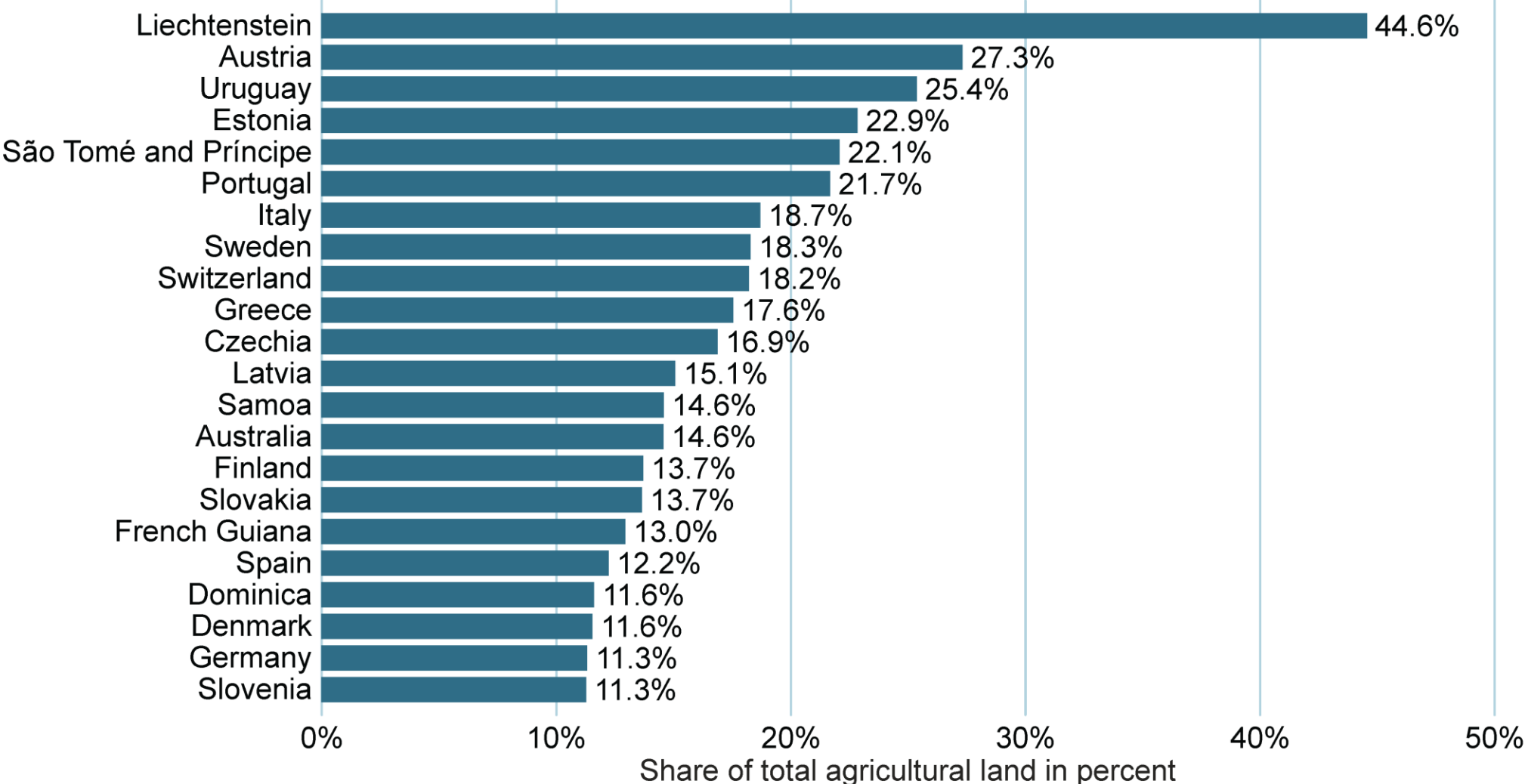
# World: The ten countries with the largest areas of organic agricultural land 2023

Source: FiBL survey 2025




# World: Countries with an organic share of the total agricultural land of at least 10 percent 2023

Source: FiBL survey 2025



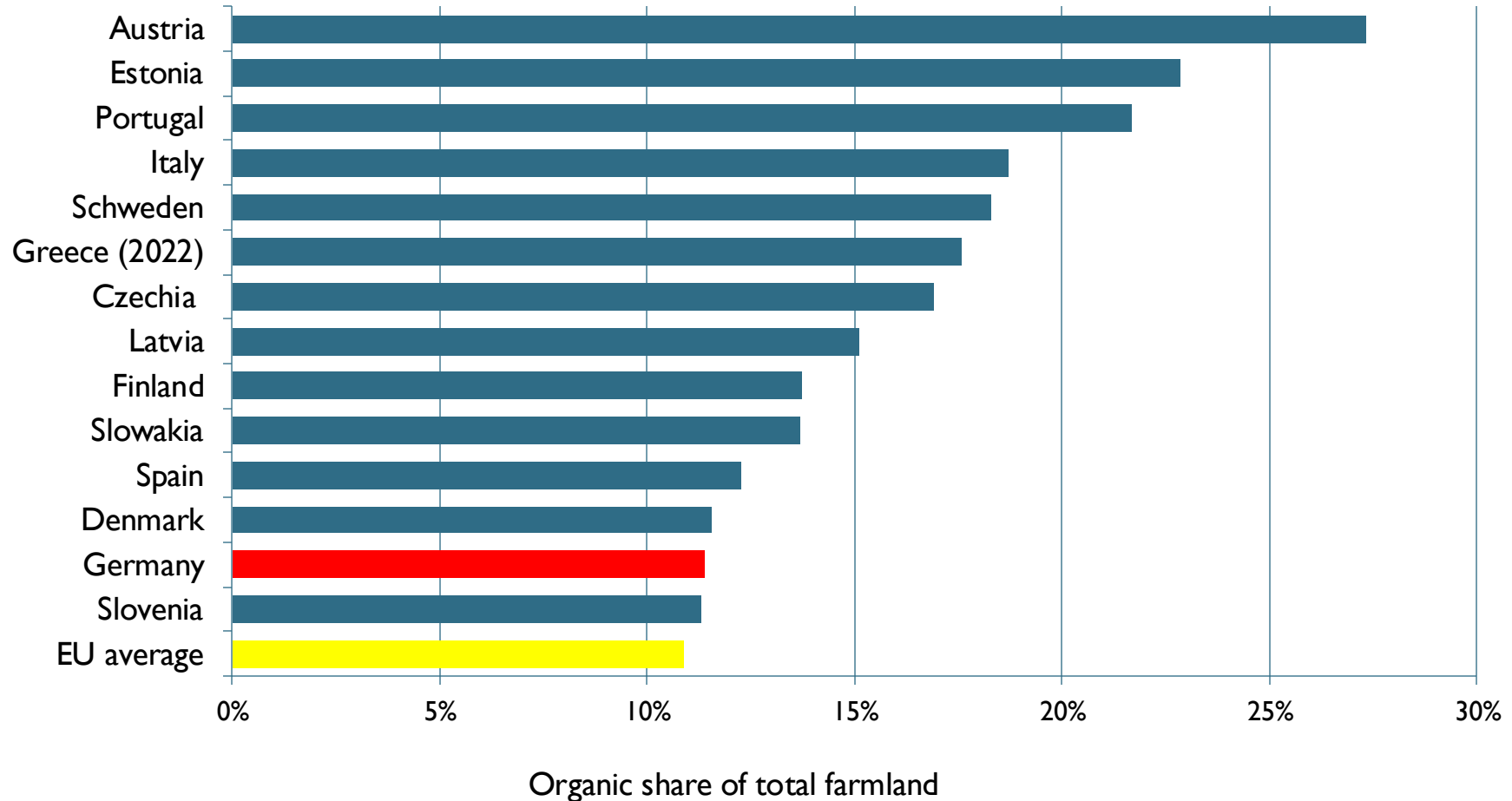
Worldwide, there are 22 countries with an organic share of 10% or more.

 Liechtenstein has the highest share at 44.6%.



# European Union: Countries with an organic area share of at least 10 percent (14 countries) 2023

Quelle: FiBL survey 2025

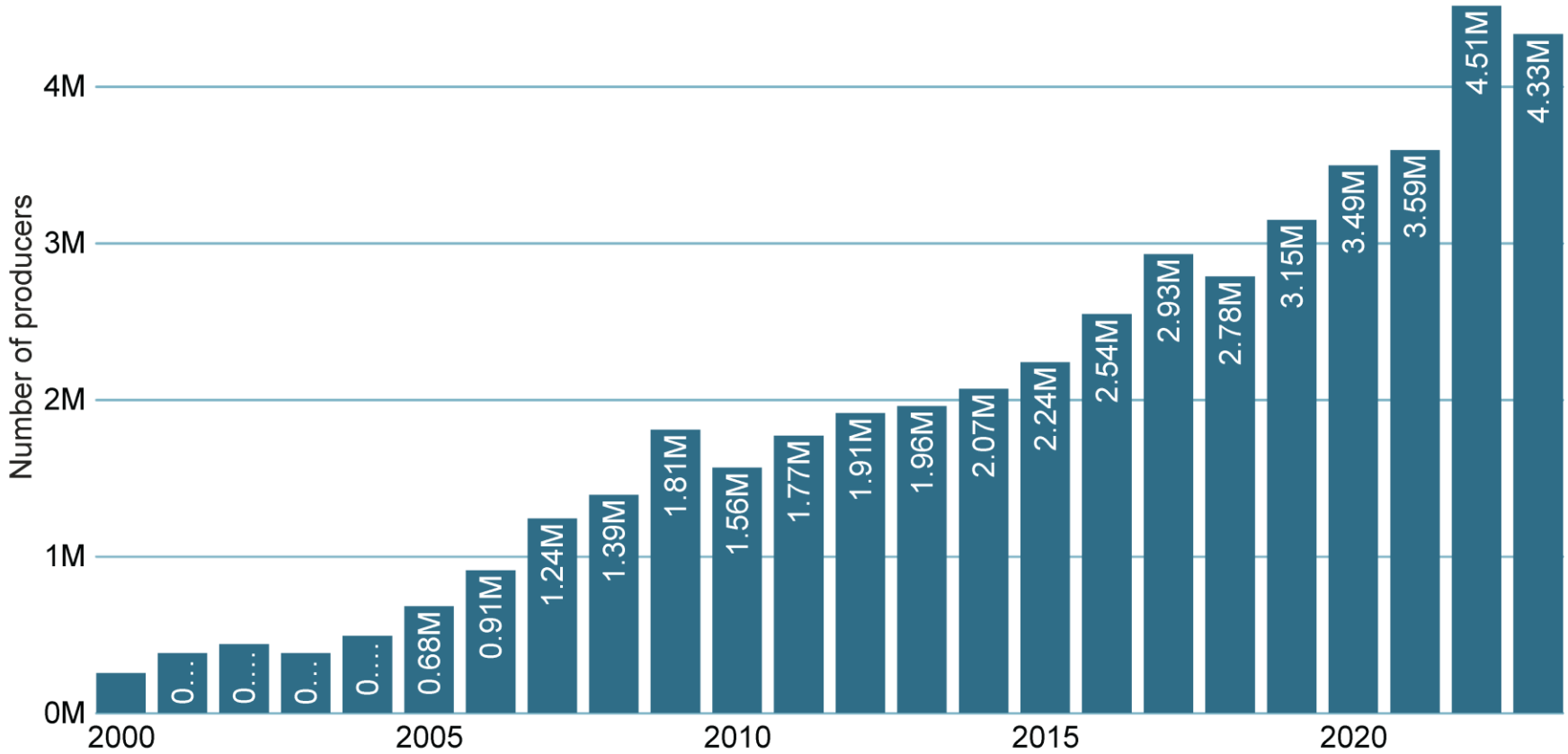


European Union: 14 countries have an organic farmland share of at least 10%. Austria (27.3%) has surpassed the 25% mark (Farm to Fork goal).

# World: Development of the number of organic producers

## 2000 - 2023

Source: FiBL survey 2001-2025



A total of 4.33 million organic producers was counted

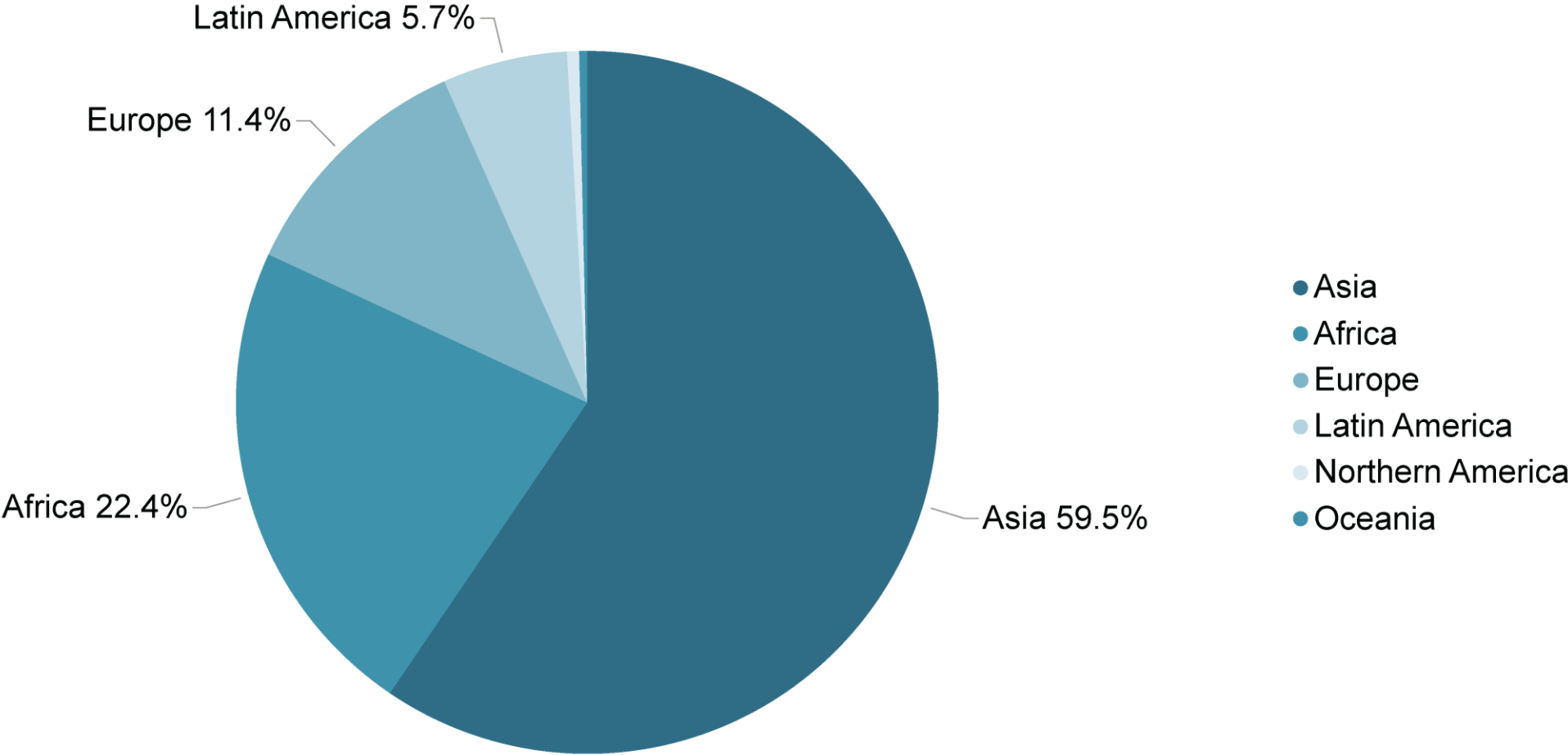
Larger decreases were note in India and Thailand, which, however, noted a exceptional increase in 2022.

Note on producers: Number of smallholder farmers not always provided.

## Growth of organic producers 2000-2023

# World: Distribution of organic producers by region 2023

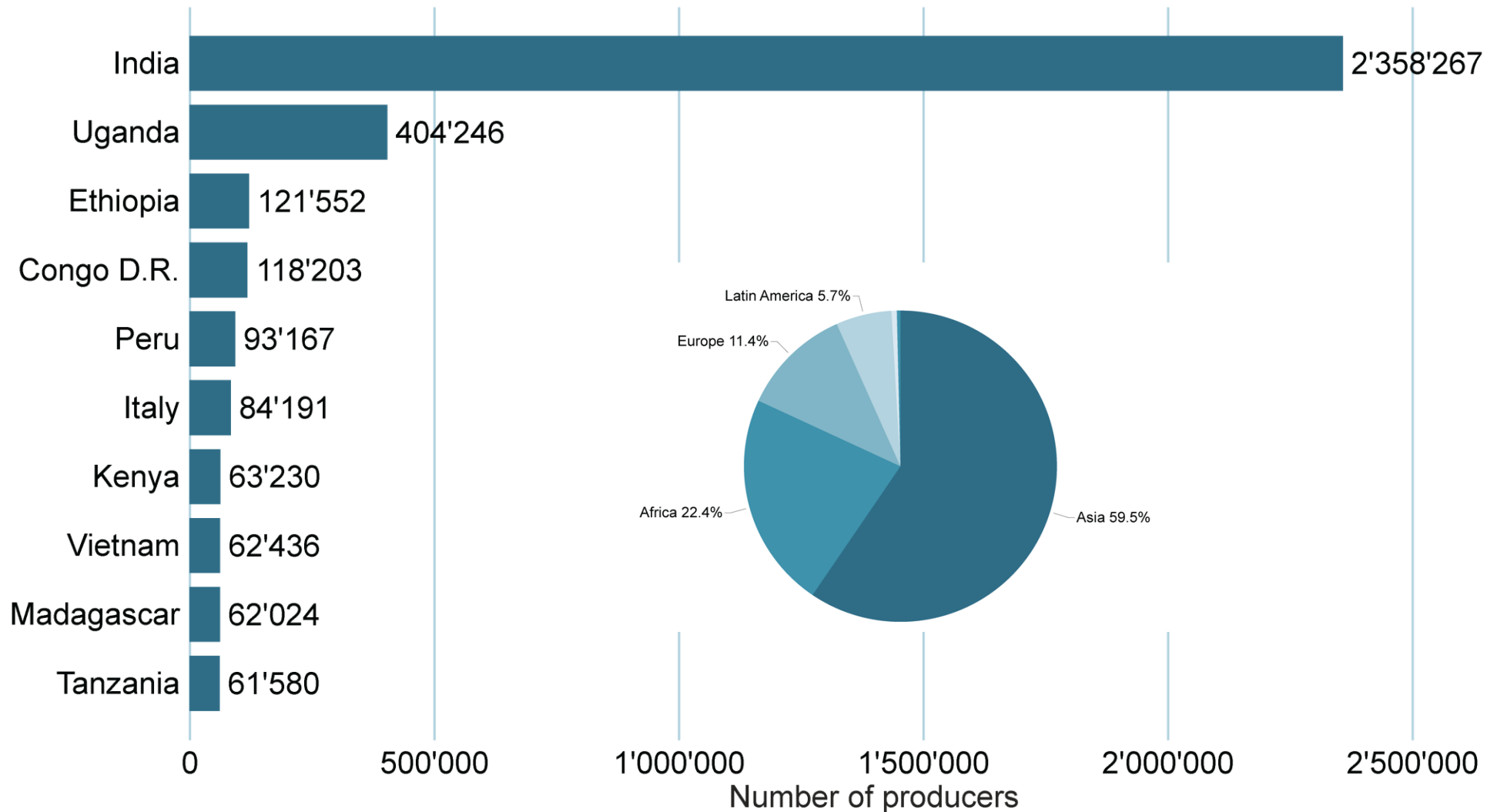
Source: FiBL survey 2025





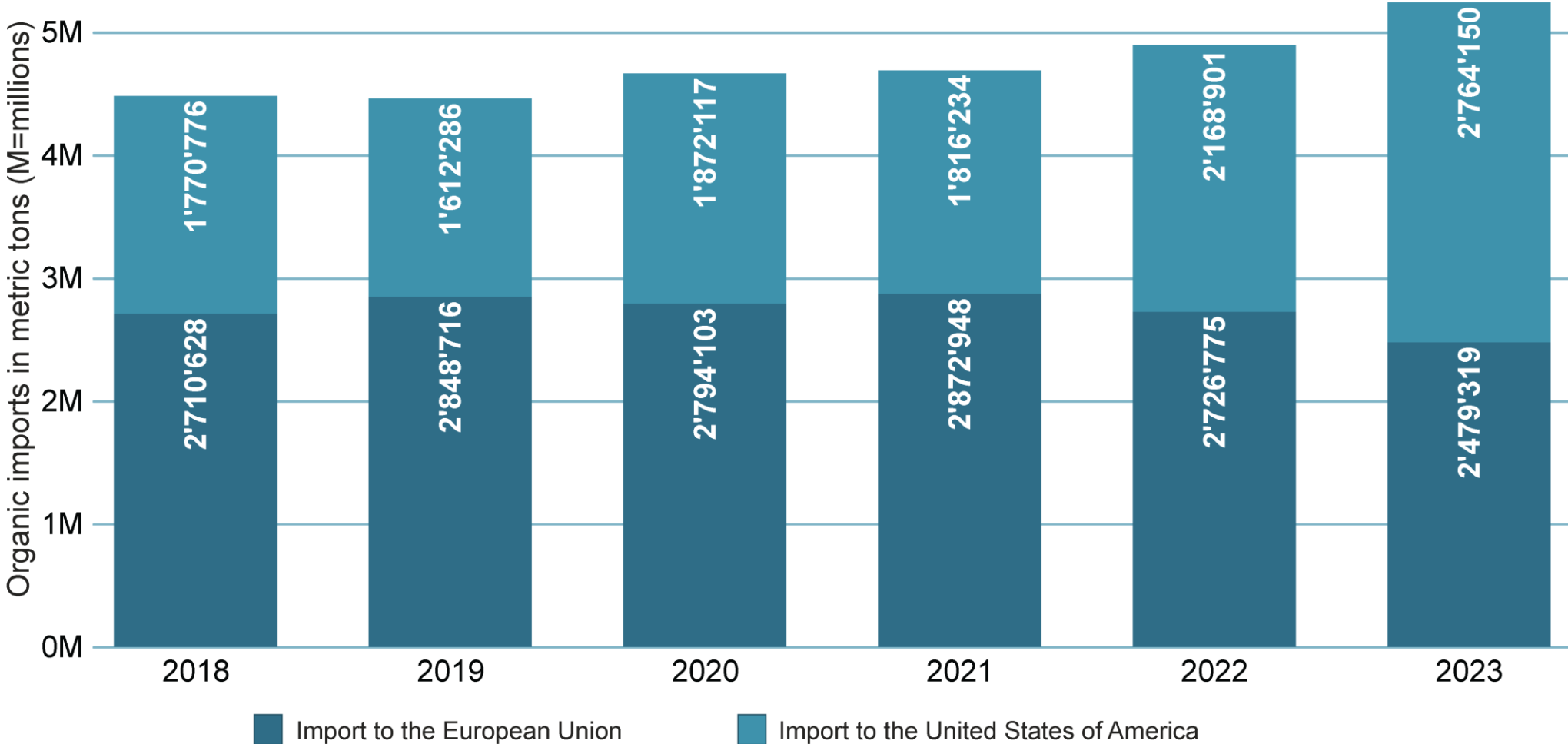
# World: The ten countries with the most organic producers 2023

Source: FiBL survey 2025



# World: Development of EU and US organic imports 2018-2023

Sources: Traces/European Commission and GATS/USDA



**US organic imports: Not all products are included, e.g., cocoa, oilseeds are missing (except soybeans)**

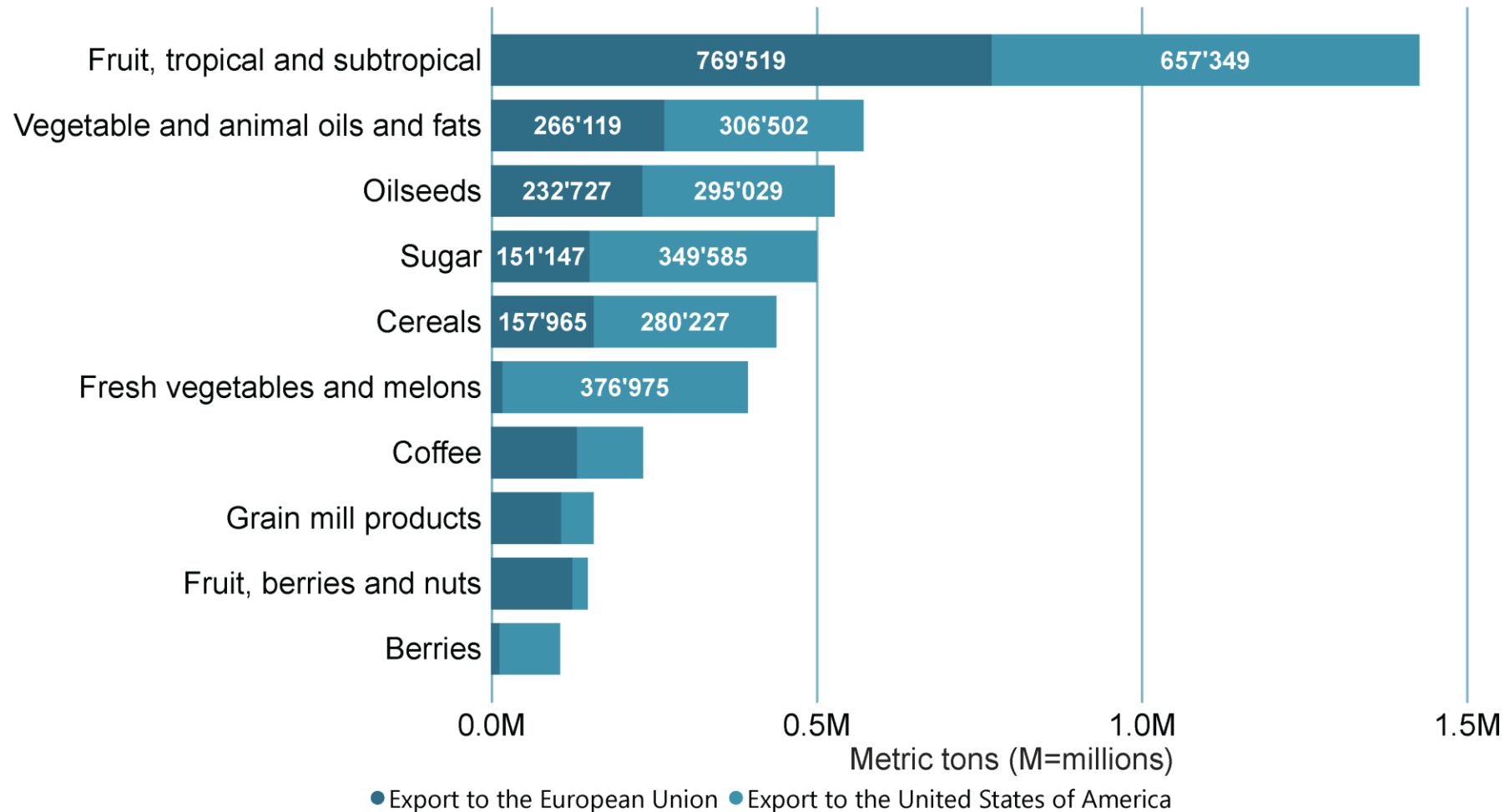
**Total EU and US imports: 5.2 million metric tons, up from 4.9 million in 2022**

**Top exporters: Mexico, Ecuador, Peru**

**Top product groups: Tropical fruits, oils+oilcakes, oilseeds**

# World: Key organic export product groups 2023 (exports to EU and US)

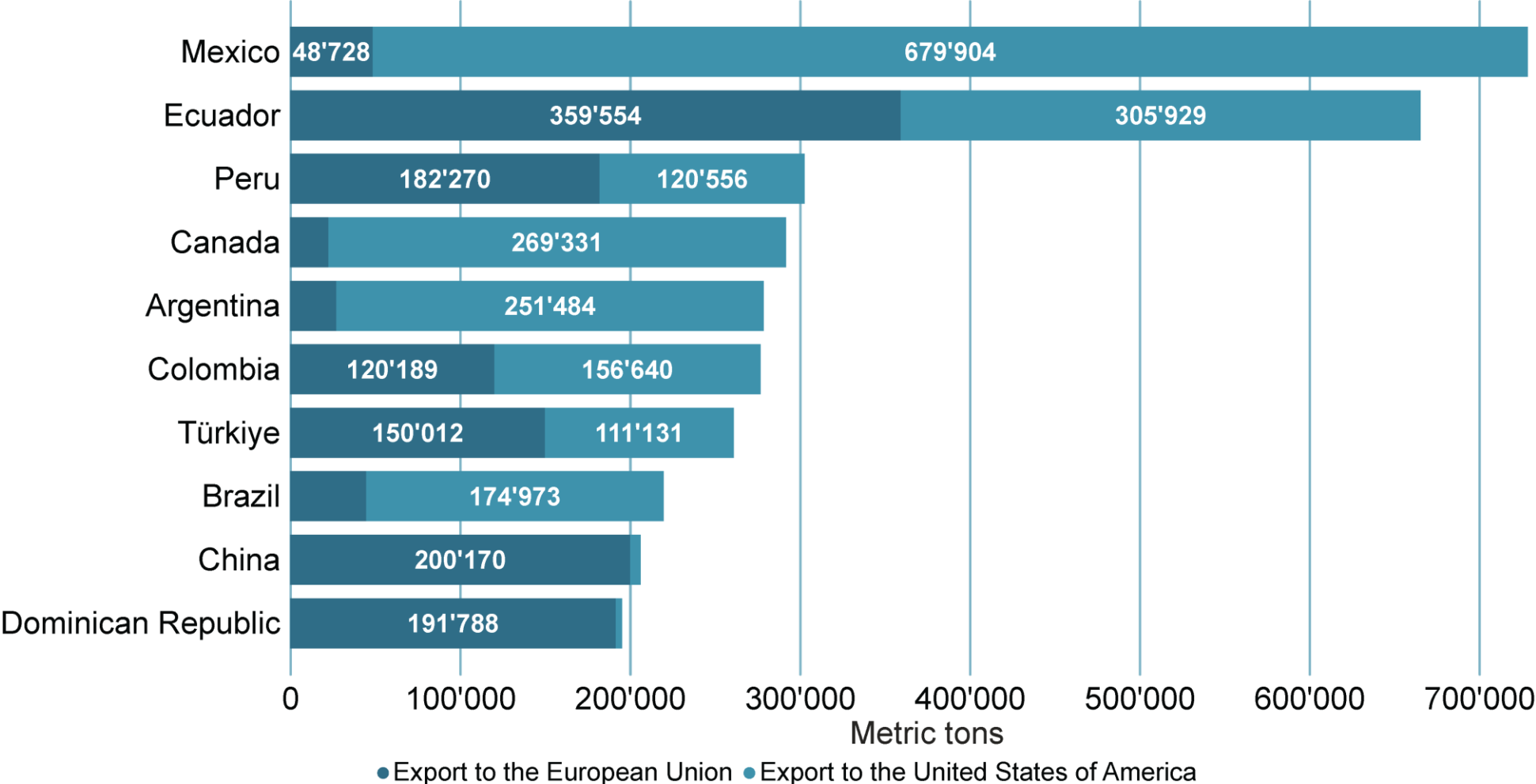
Sources: Traces/European Commission and GATS/USDA





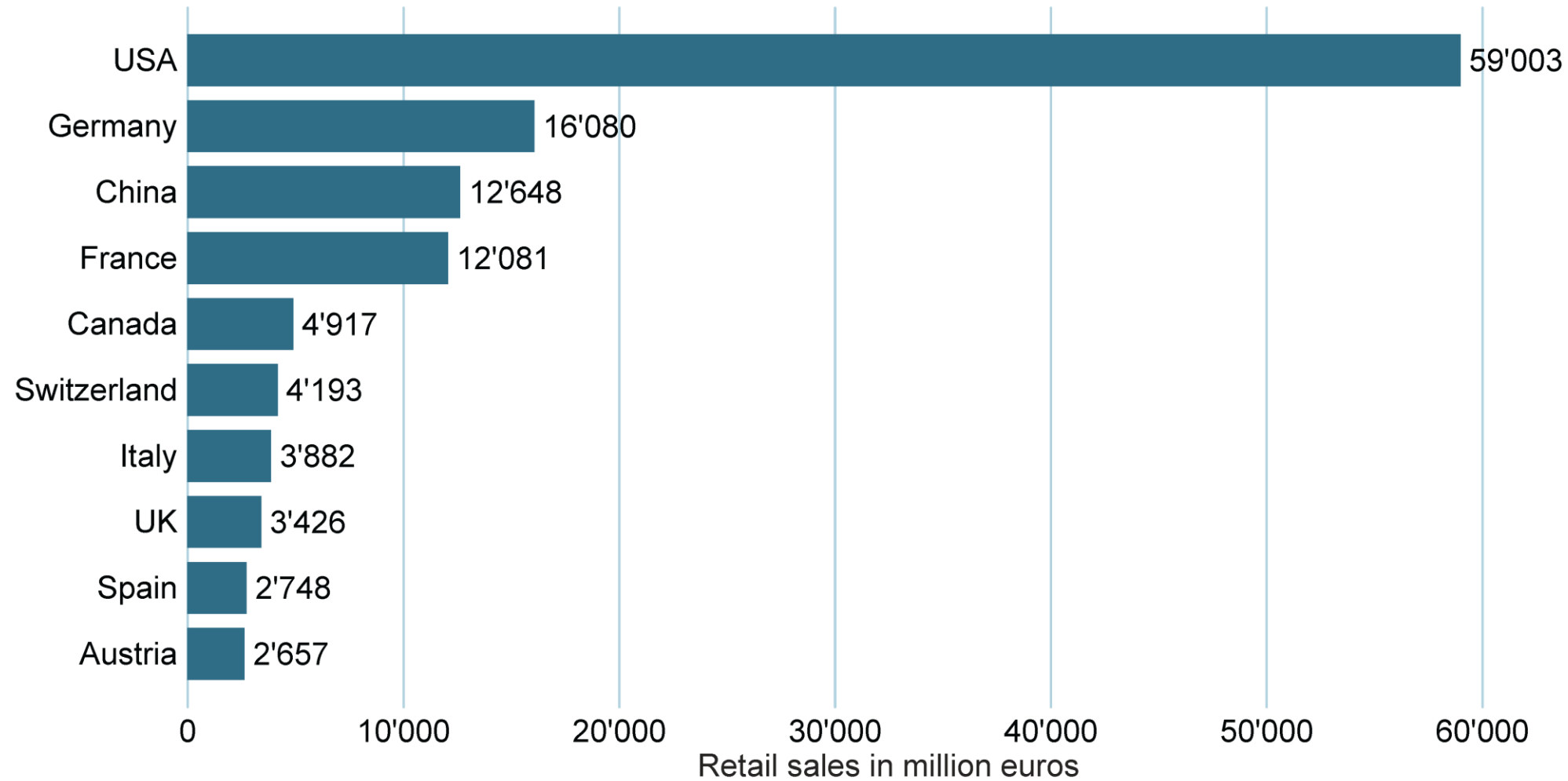
# World: Key countries with organic exports to the EU and US 2023

Sources: Traces/European Commission and GATS/USDA



# World: The countries with the largest markets for organic food 2023

Source: FiBL-AMI survey 2025



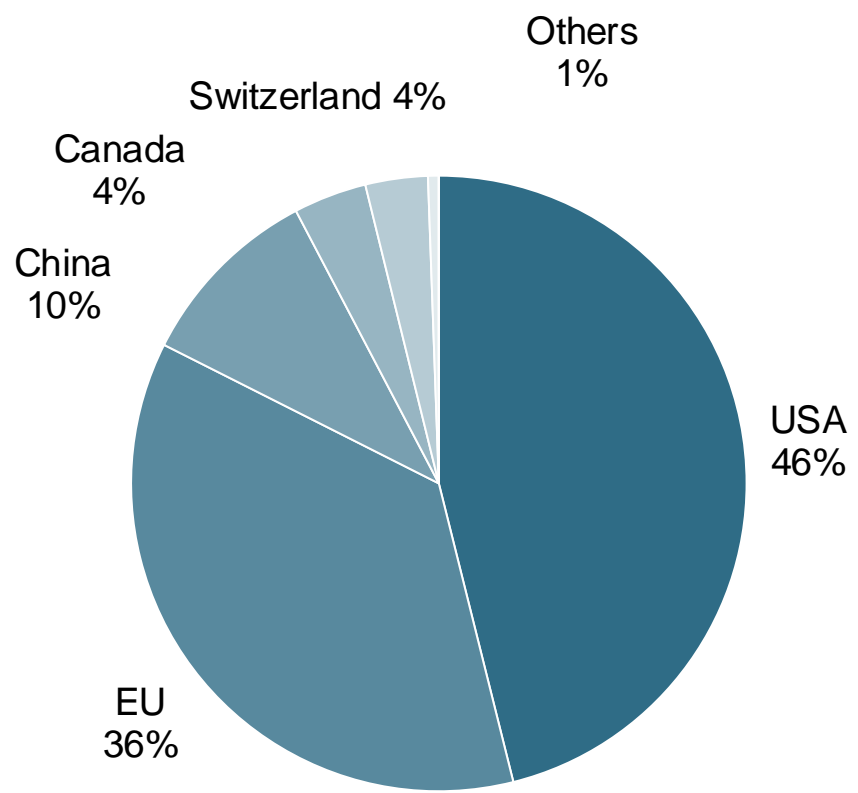
Consider currency fluctuations (USA, China, Canada, Switzerland)!

Highest per capita consumption: Switzerland and Denmark

Highest organic market share: Denmark and Switzerland

# Organic retail sales by single market 2023

Source: FiBLAMI survey 2025



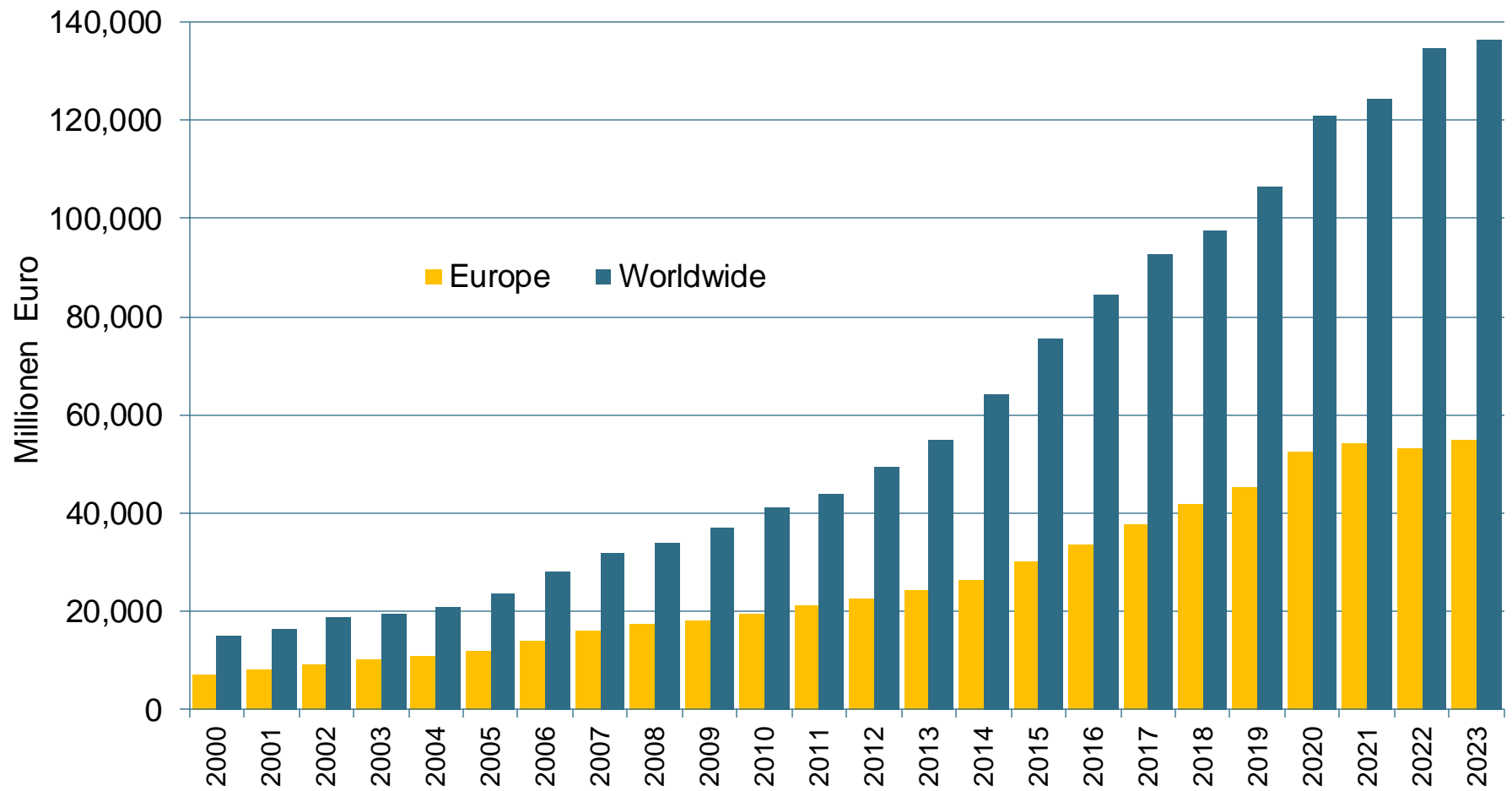
**Consider currency fluctuations (USA, China, Canada, Switzerland)!**

## Distribution of retail sales by single market



# European and global retail sales growth 2000-2023

Source: FiBL surveys 2000-2025



**Global organic market: €136.4 billion (2022: €134.8 billion)**

**European organic market: €54.7 billion (+3.0%)**

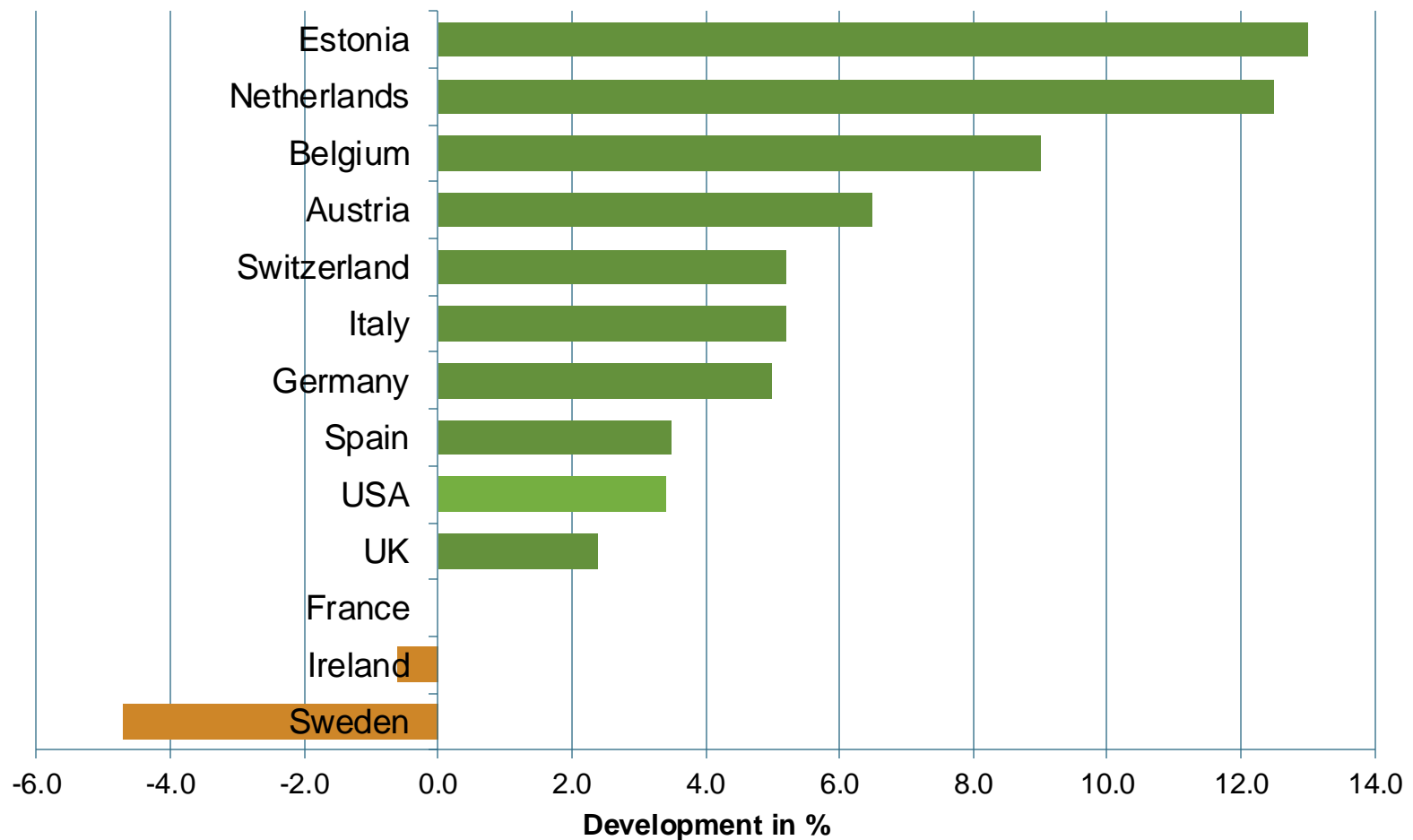
**EU organic market: €46.5 billion (+2.9%)**

## Growth of the organic market in Europe and worldwide 2000-2023

# Development of organic retail sales in selected countries

2023

Source: FiBLAMI survey 2025

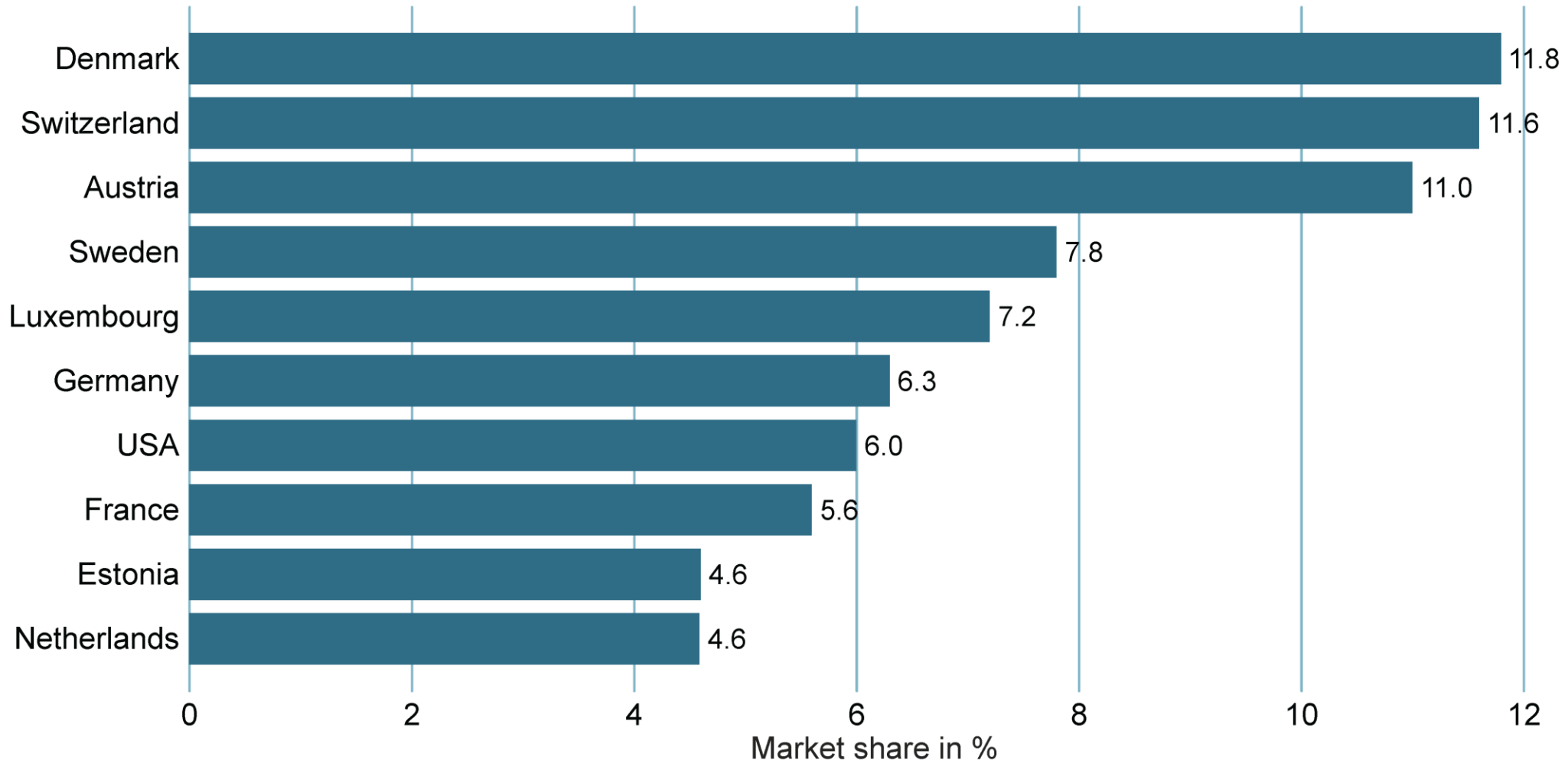


## Development of organic retail sales in selected countries 2023

# World: Top ten countries with the highest organic market shares of the total retail sales 2023

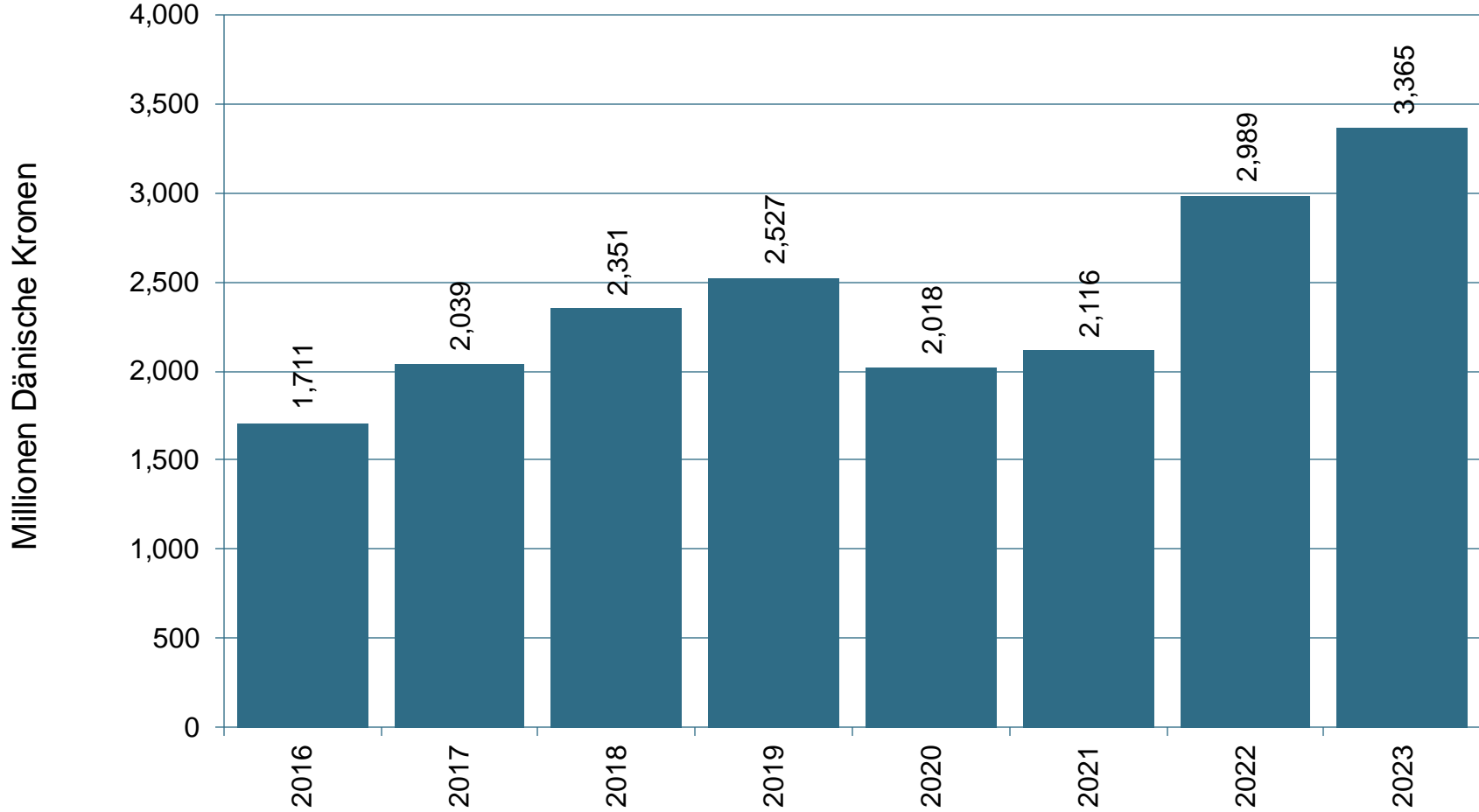
Source: FiBL-AMI survey 2025

European organic market shares are the highest in the world !



# Denmark: Food service 2016-2023

Source: Statistics Denmark



**2023: 3,365 million DKK = 451 million EUR**

**Growth in out-of-home consumption (2022-2023): +12%**

**Growth in retail sales (2022-2023): -0.4%**


**Food Service has also developed very positively in Austria, France, and Sweden.**

## Dänemark: Entwicklung Ausser-Haus-Verpflegung





# Summary

- Globally and in Europe, organic farmland has grown slightly.
- The global organic market reached over 136 billion euros, marking a new all-time high.
- After declines in Europe in 2022, markets in many countries grew in 2023, mainly due to higher prices.
- Out-of-home consumption is experiencing particularly strong growth.
- Organic imports into the EU decreased in 2023, while they increased significantly in the USA.
- Very few figures for 2024 are available so far; it is too early to make reliable statements on the global development of the sector in 2024.

 **99 million hectares of organic farmland (2.1% of total); +2.6% growth**

 **4.3 million organic farms**

 **136.4 billion euros revenue from organic products**

 **5.2 million tons of organic products exported to the EU and USA, +7.1%**  
**- EU: -9.1%**  
**- USA: +27.4%**

## Statistics Sessions at BIOFACH 2025

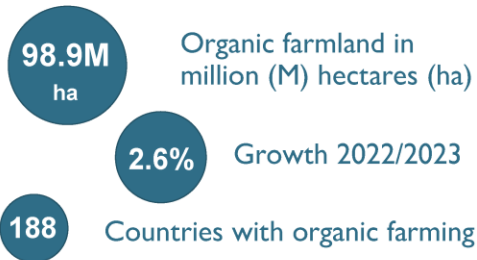
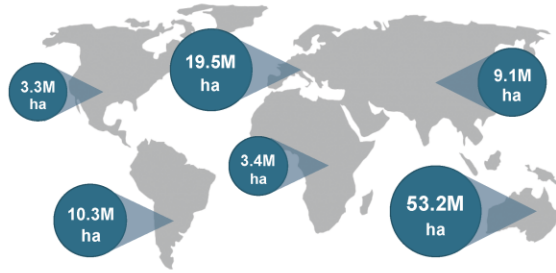
- 11 February, 3:45-4.45 pm: The European market for organic food
- 11 February, 5.00-6.00 pm: The World of Organic Agriculture
- 12 February 4:00-5:30 pm: Global Organic Market Overview
  
- FiBL Stand (4A-625, Hall 4a)

[www.organic-world.net](http://www.organic-world.net)

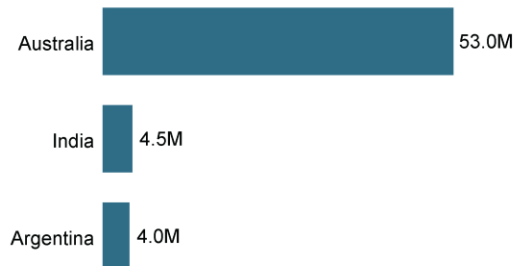
[Statistics.FiBL.org](http://Statistics.FiBL.org)

# Organic Agriculture Worldwide 2023

## Organic Farmland



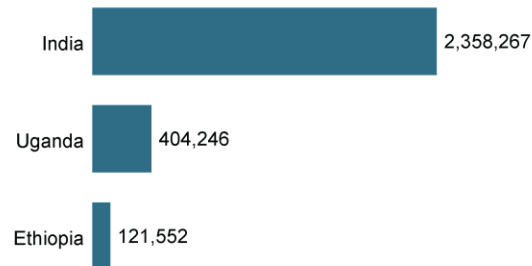
### Farmland in million (M) hectares Top 3 countries



## Organic Operators



### Number of producers Top 3 countries

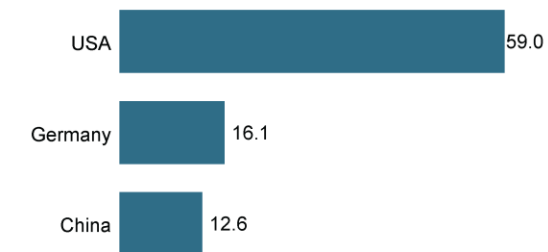


## Organic Market

The global market is growing and consumer demand is increasing



### Market in billion euros Top 3 countries



### Market growth in percent Top 3 countries 2022/2023



Thank you very much for  
your attention!



FiBL & IFOAM – ORGANICS INTERNATIONAL THE WORLD OF ORGANIC AGRICULTURE 2025 STATISTICS



FiBL & IFOAM – ORGANICS INTERNATIONAL

# THE WORLD OF ORGANIC AGRICULTURE

## STATISTICS & EMERGING TRENDS 2025



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# Resources

- «The World of Organic Agriculture» at [www.organic-world.net](http://www.organic-world.net)
- Slides and infographics at [www.organic-world.net](http://www.organic-world.net)
- [Twitter.com/fiblstatistics](https://twitter.com/fiblstatistics)
- Interactive data tables at [statistics.fibl.org](http://statistics.fibl.org)
- Interactive data visualisations at [statistics.fibl.org](http://statistics.fibl.org)
- Interactive map at [www.ifoam-eu.org](http://www.ifoam-eu.org)

# Presentations at [www.organic-world.net](http://www.organic-world.net)

## Organic World

Global organic farming statistics



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[Organic World](#) >> [Yearbook](#) >> [2025 edition](#)

### The World of Organic Agriculture 2025

"The World of Organic Agriculture" 2025 will be launched at the BIOFACH Congress, which takes place in Nuremberg, Germany from February 11 to 14, 2025.

[DATA ONLINE](#) >

[CONTENTS](#) >

#### The World of Organic Agriculture 2025



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#### THE WORLD OF ORGANIC AGRICULTURE

STATISTICS & EMERGING TRENDS 2025

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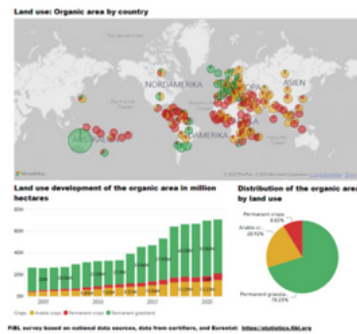
Statistics >> Visuals

### Data visualisation

On these pages, we are presenting our data in a visualized format.

So far, the key indicators (area, producers, retail sales) crop data area available for organic agriculture worldwide, Africa and for the European Union.

Furthermore, area and producer data are available for Switzerland (in German).



- WORLD >
- AFRICA >
- EUROPEAN UNION >
- SWITZERLAND >

How to use the Power BI interactive graphics on selected crops

- **For global data:** The graphs show the global data for the selected crops/crop groups. Scroll down the bar charts in the upper row to see all countries sorted by area or area share.
- **For regional data:** Chose a region on the graphs with the continent (bottom right) to see:
  - The continental map for the selected crop (country breakdown)
  - The area for the selected crop by country (upper row, first bar chart)
  - The organic area share for the selected crop (upper row, second bar chart)
  - The development of the area for the selected crop (bottom left)
  - The breakdown by crop, where relevant (bottom centre)
- **For country data:** Chose a country (on the map or in the bar charts with the countries sorted by area or by area share) to see



# Contact

- Helga Willer  
Research Institute of Organic Agriculture (FiBL)  
Ackerstrasse 113, 5070 Frick, Switzerland  
Tel. +41 79 218 0626  
[helga.willer@fibl.org](mailto:helga.willer@fibl.org)  
[www.fibl.org](http://www.fibl.org)  
[www.organic-world.net](http://www.organic-world.net); [statistics.fibl.org](http://statistics.fibl.org)
- Willer, Helga, Jan Trávníček and Bernhard Schlatter (Eds.) (2025): The World of Organic Agriculture. Statistics and Emerging Trends 2025. Research Institute of Organic Agriculture (FiBL), Frick, and IFOAM – Organics International, Bonn.
- Available at [www.organic-world.net/yearbook/yearbook-2025](http://www.organic-world.net/yearbook/yearbook-2025)



## Market overview - Europe

Joanna Wierzbicka, IFOAM Organics Europe

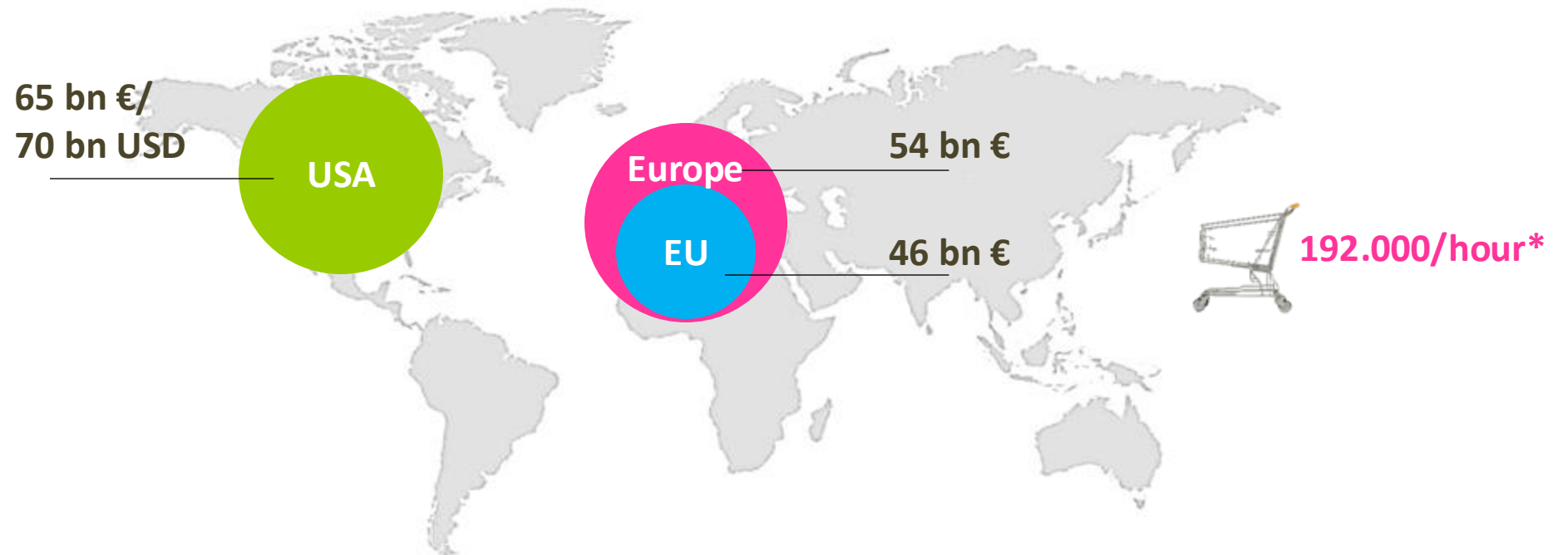


**BIOFACH**

into organic

**IFOAM**  
ORGANICS EUROPE

# EU remains the second largest market, following the United States



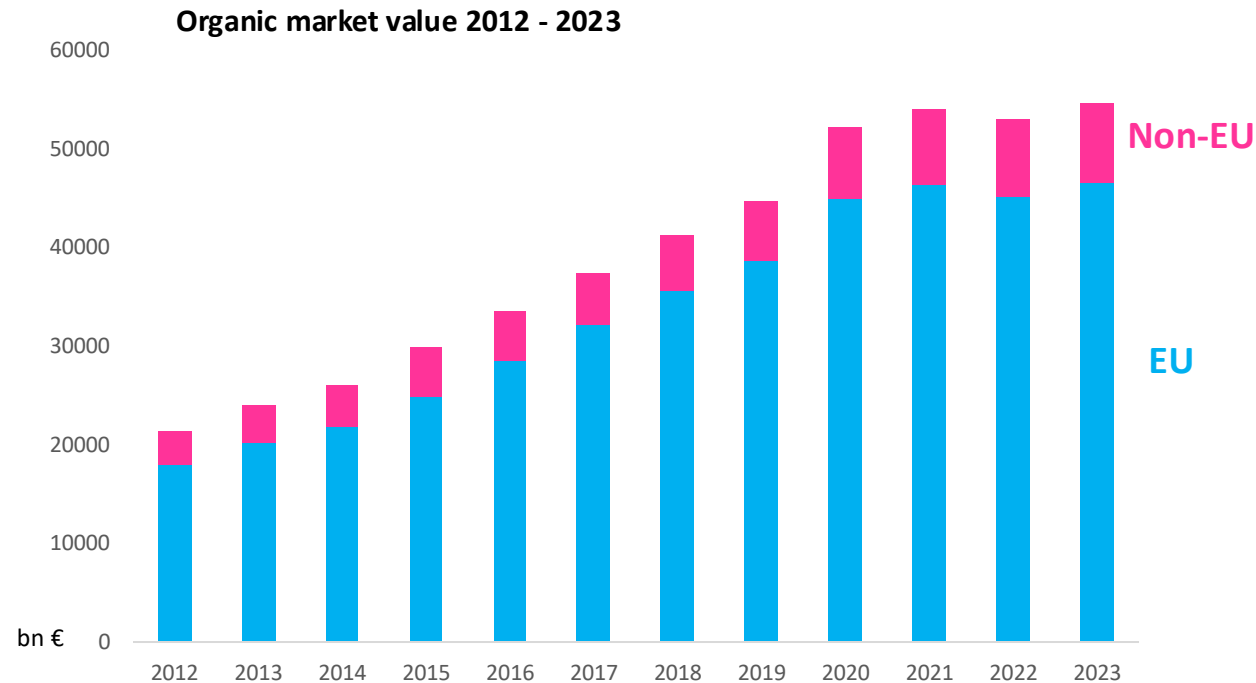
Sources:

Data from FiBL (24 Jan 2025). Some data not available yet.

Data from OTA <https://ota.com/news/press-releases/23183>

\* Calculated on an average basket value of 32 euros

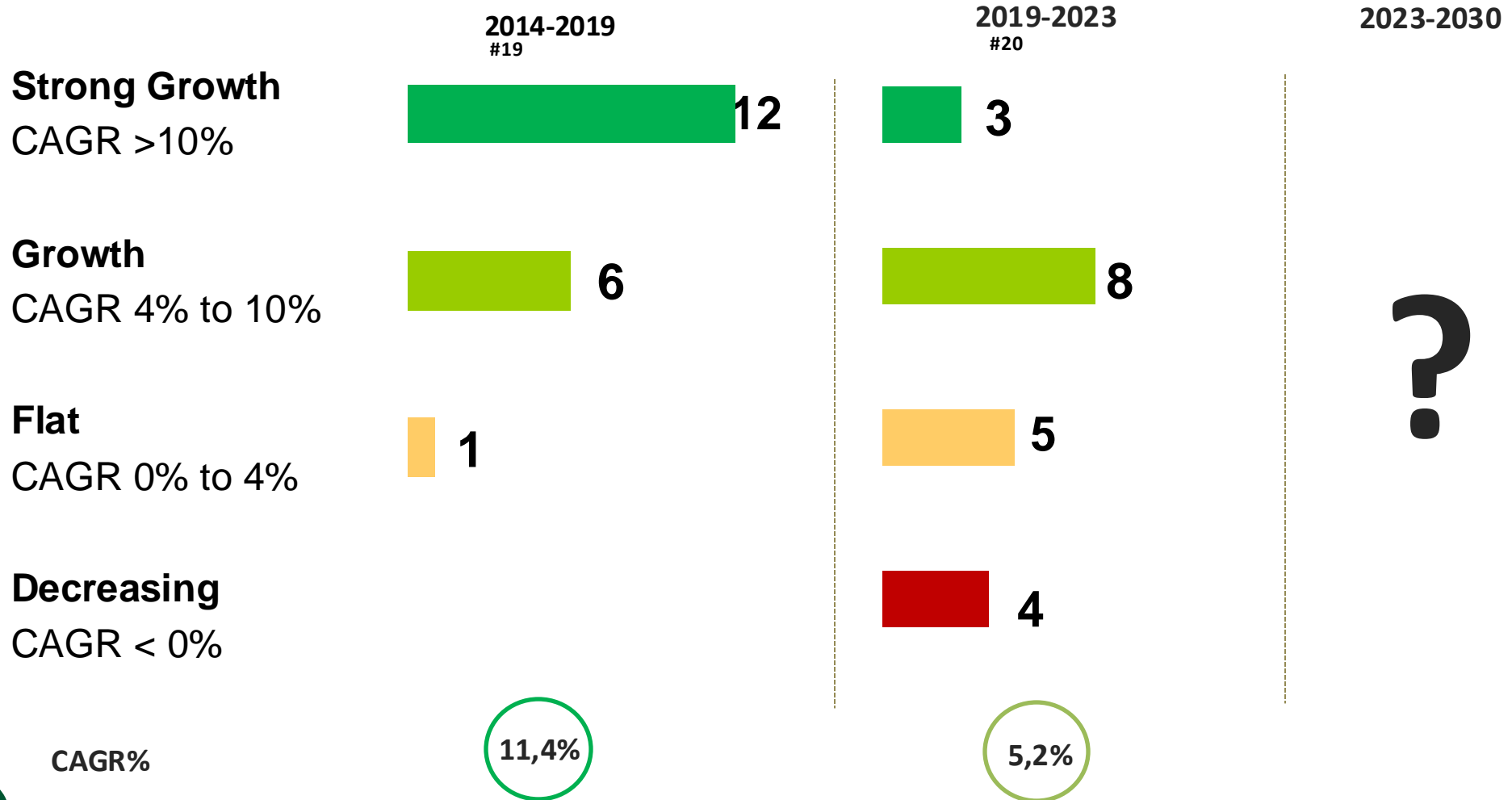
# Despite the slowdown, the market size shows that organic is not just a trend, but a long-lasting change.



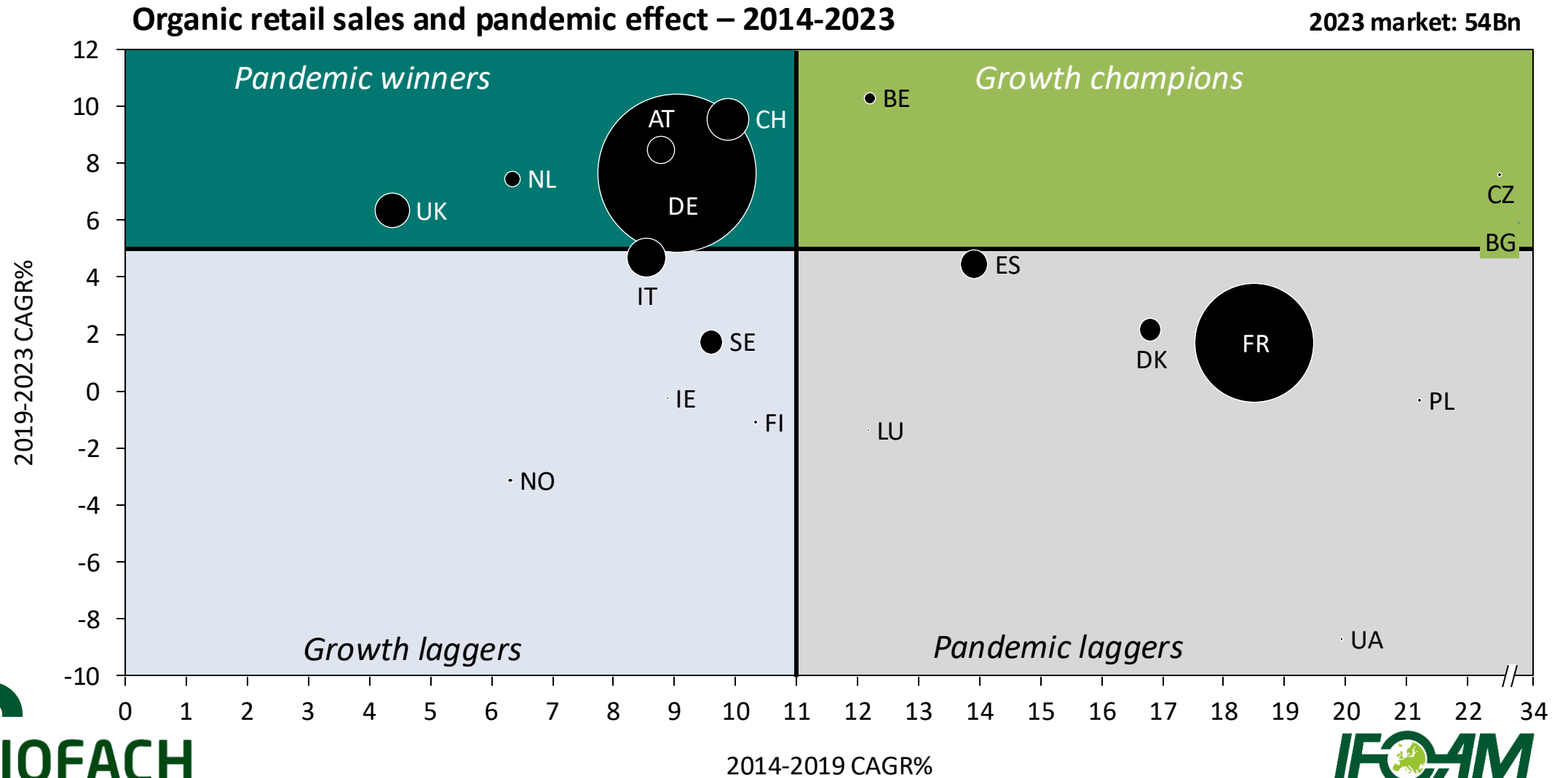
## Key facts

- The slowdown 2021-2023, main factor inflation and energy prices.
- The slight growth in 2023 driven by the value increase (inflation), not the volume
- Positive: market maintained its size after 2019, year marked by the pandemics => organic not a short-term trend, but long-lasting shift.

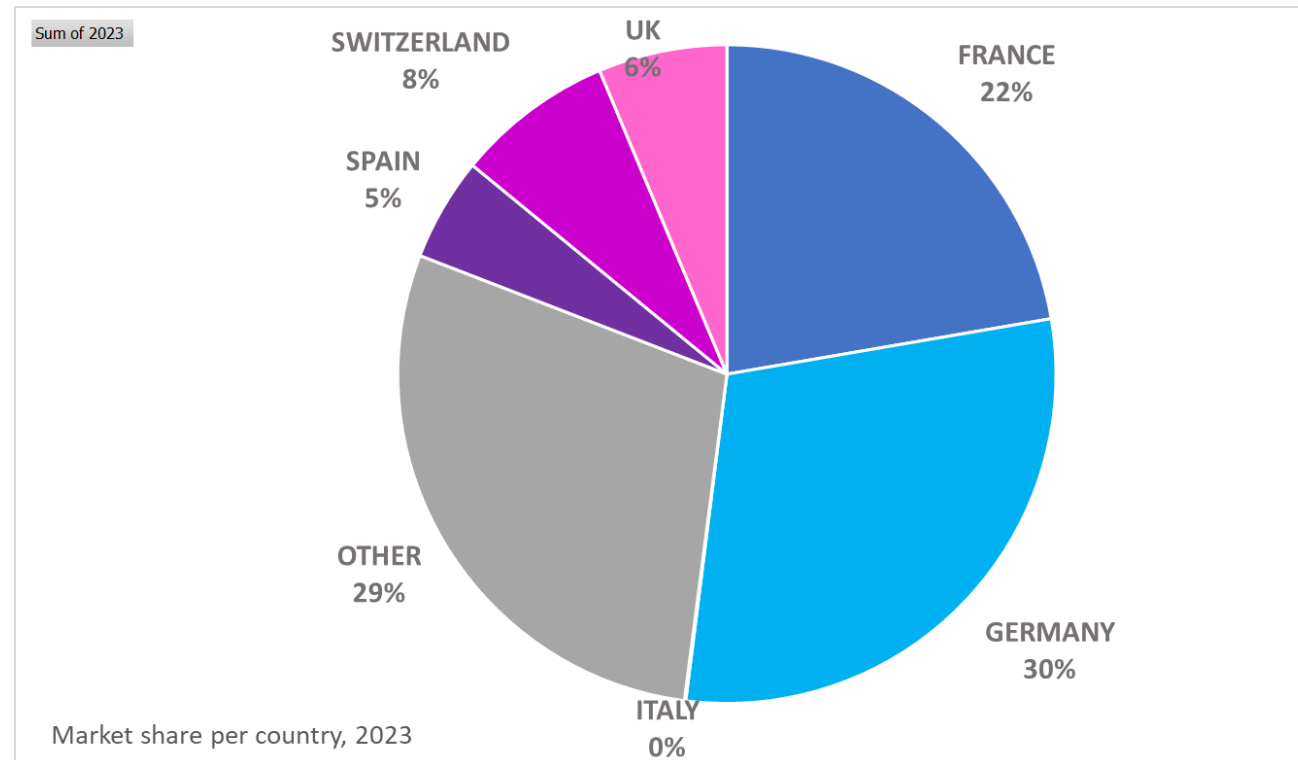
# Market continues to grow, but at a slower pace



# There are some winners of the pandemics, and there are some laggards too

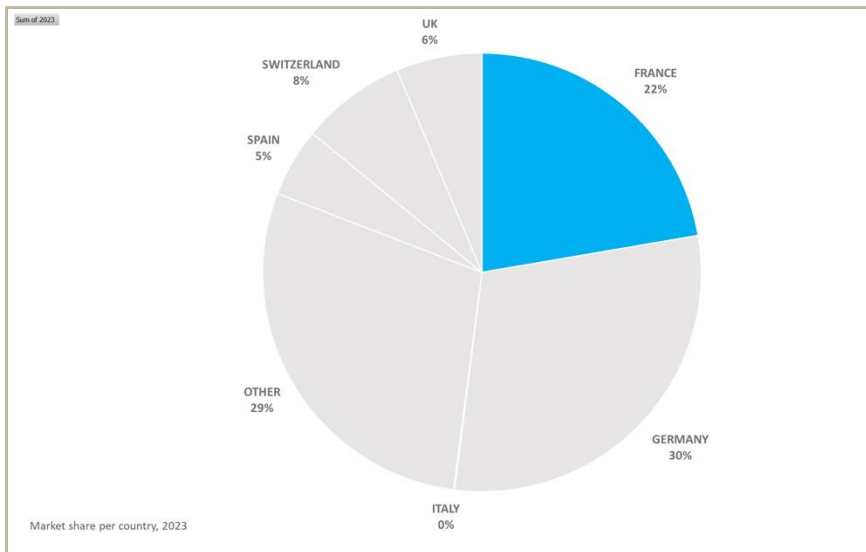


# France and Germany play a key role in European organic market growth



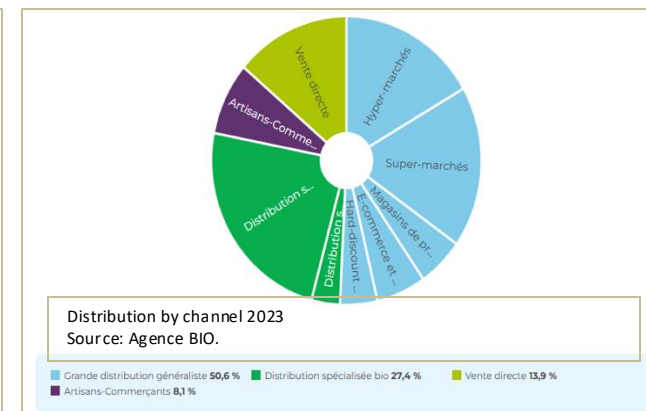
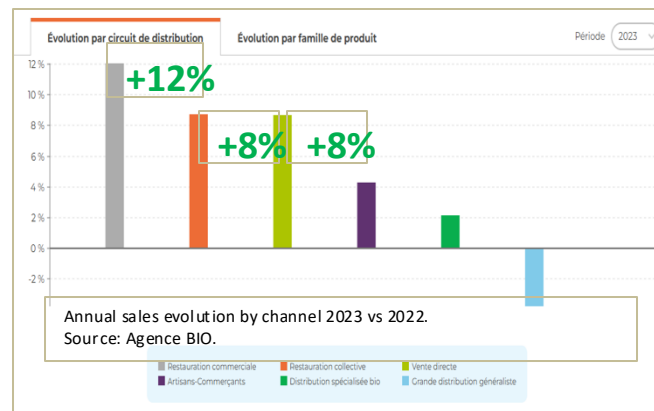
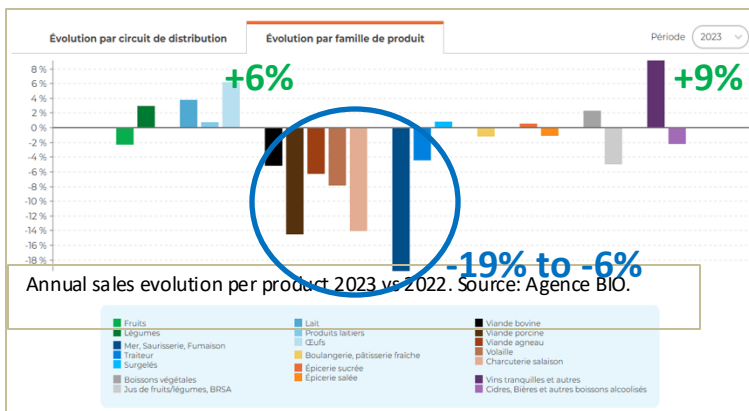


# Zoom on France

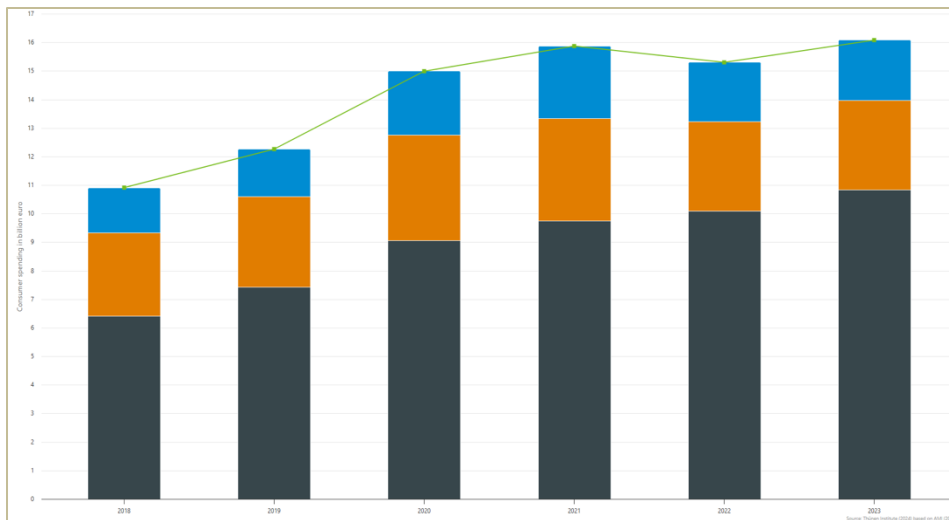
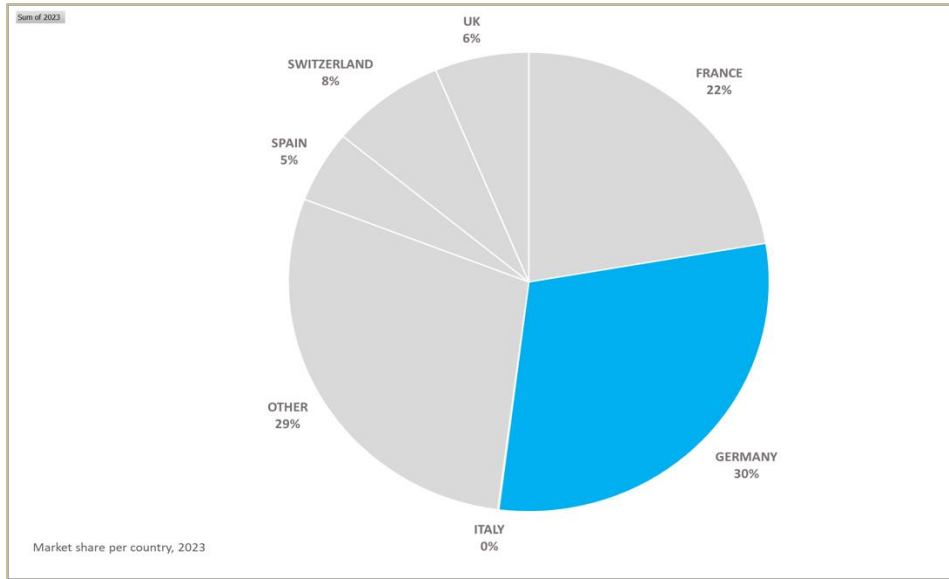


## Key facts

- Out of home consumption and direct sales are key drivers of market growth.
- Wine and eggs consumption key growth driver, meat and fish in decline.
- Political context: possible elimination of Agence Bio promoting organic products.



# Zoom on Germany



■ Specialised organic retailers (incl. Wholesalers, farm shops)
 ■ Food retail
 ■ Other (bakeries, butchers, fruit shops)

## Key facts

- All sales channels recorded growth.
- The discounters accounted for 30 percent of organic sales) share was even higher for fresh products. They have expanded their product ranges in recent years, added some higher-priced products to their range and increased prices (source, BOELW, 2024).
- Organic specialist stores achieved a market share of 20 percent in 2023.
- Other sales outlets (farm shops, online retailers, weekly markets, bakeries, butchers and health food stores) achieved small increases of two percent. After a minus of 18 percent in 2022, this is a remarkable result. The growth did not come from the farm shops, which continued to record sales losses, but mainly from the food trade and also the weekly markets. Bakeries and butchers had to turn the price screw significantly in 2023, which had a positive effect on their sales.
- With an overall inflation rate of nine percent for food in 2023, organic food was only five percent more expensive in comparison with conventional food.

# Get in touch with us

Joanna Wierzbicka  
Deputy Director.

joanna.wierzbicka@organicseurope.bio

 @JoannaWierzbicka

   @OrganicsEurope · [www.organicseurope.bio](http://www.organicseurope.bio)

# CANADA'S PLACE IN THE GLOBAL ORGANIC MARKET

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Biofach, February 12, 2025

Canada  
*Organic*  
trade association   
*Biologique*  
Association pour le commerce  
du Canada





# Canada Organic Trade Association



## Strategic Areas of Focus:

Market Access & Development

Market Intelligence

Public Advocacy

Regulatory Affairs

Consumer Education

# Canadian Organic Market



**CAD \$9.01 Billion  
Annual Sales**

80% of the Total Sales are Food and beverages at CAD \$7.18 Billion  
with a 1% decrease since 2022

# Canadian Organic Market (Million CAD )

4% of all sales globally

Canada  
9.01 Billion



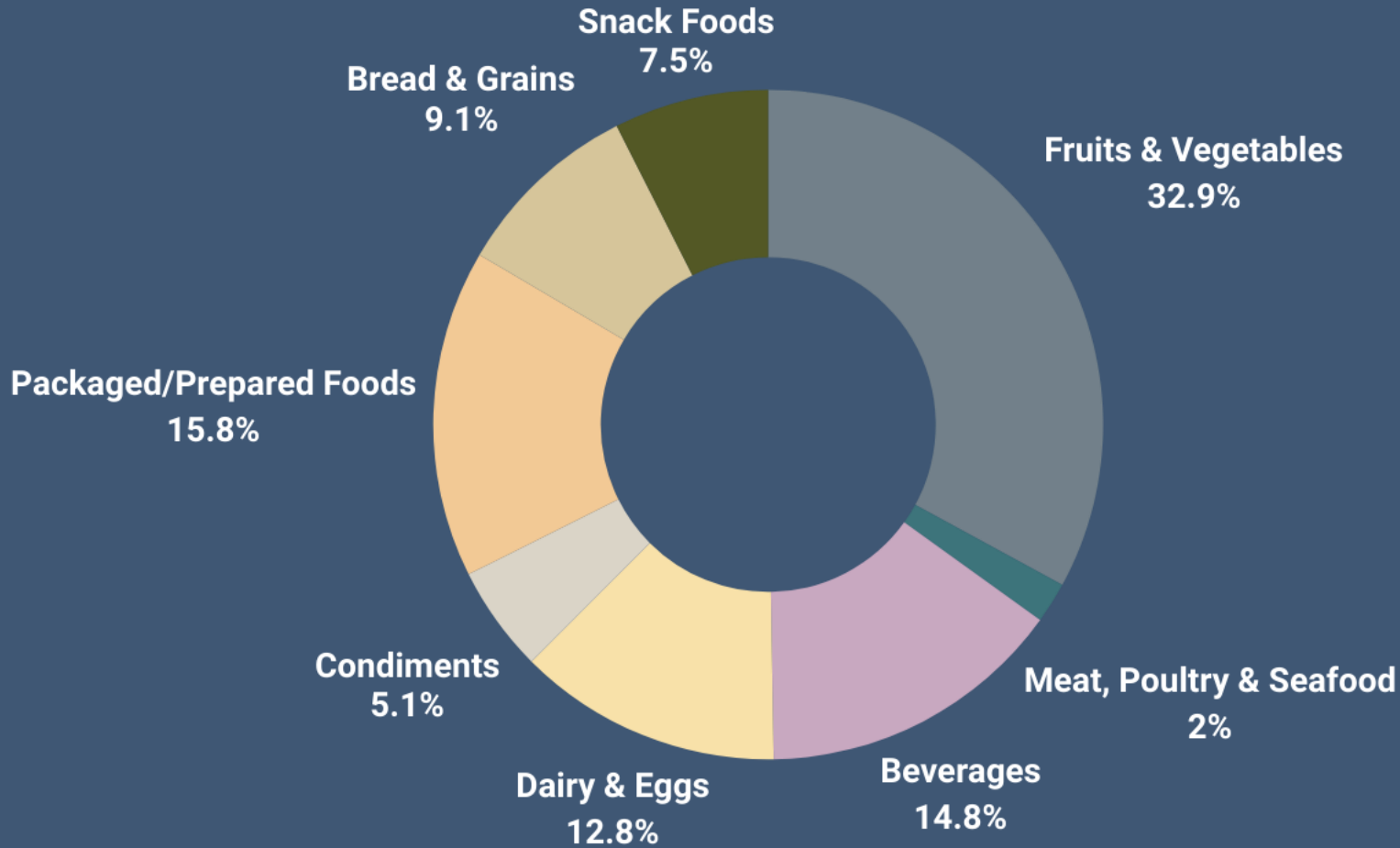
USA  
94.79 Billion

Canada is the 5th largest consumer market in the world

46% of all sales globally



# Canadian Organic Market



**3.4%** TOTAL MARKET SHARE

MARKET SHARE OF



**5.7%**  
VEGETABLES



**4.9%**  
FRUITS



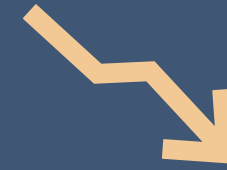
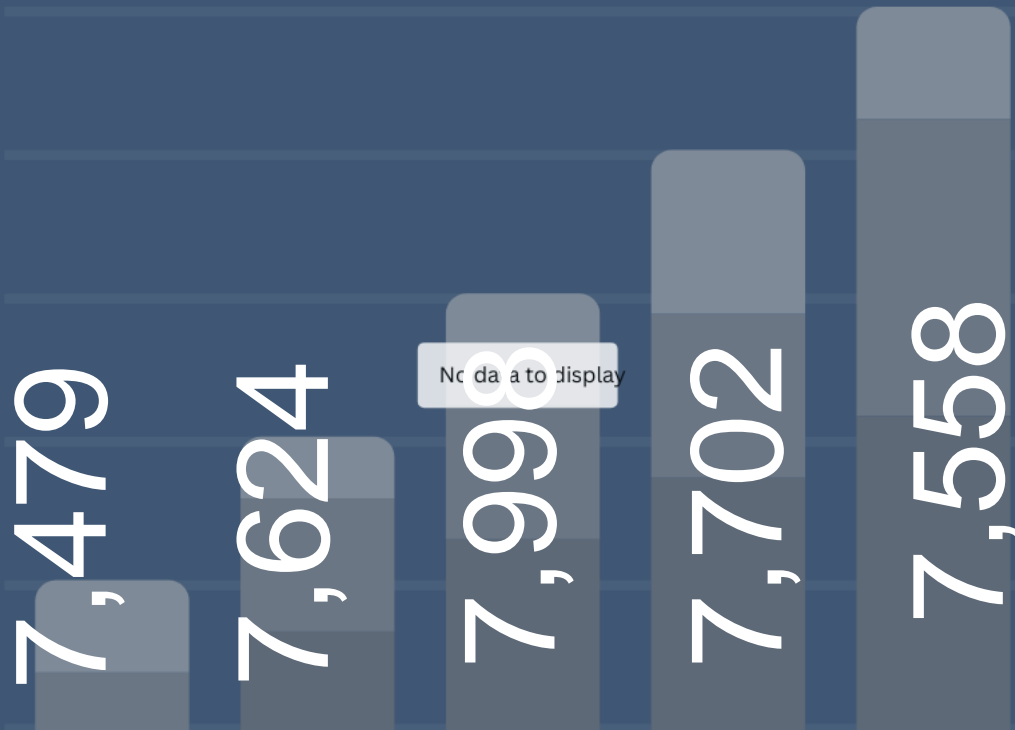
**0.5%**  
MEAT



**3.4%**  
PACKAGED FOOD

The food and beverages sector has encountered a 10% growth since 2020

# Certified Canadian Organic Operators



Decline of 144 operators since 2022  
44% of loss was from one region



However, the year over year change since 2019 was +0.2%


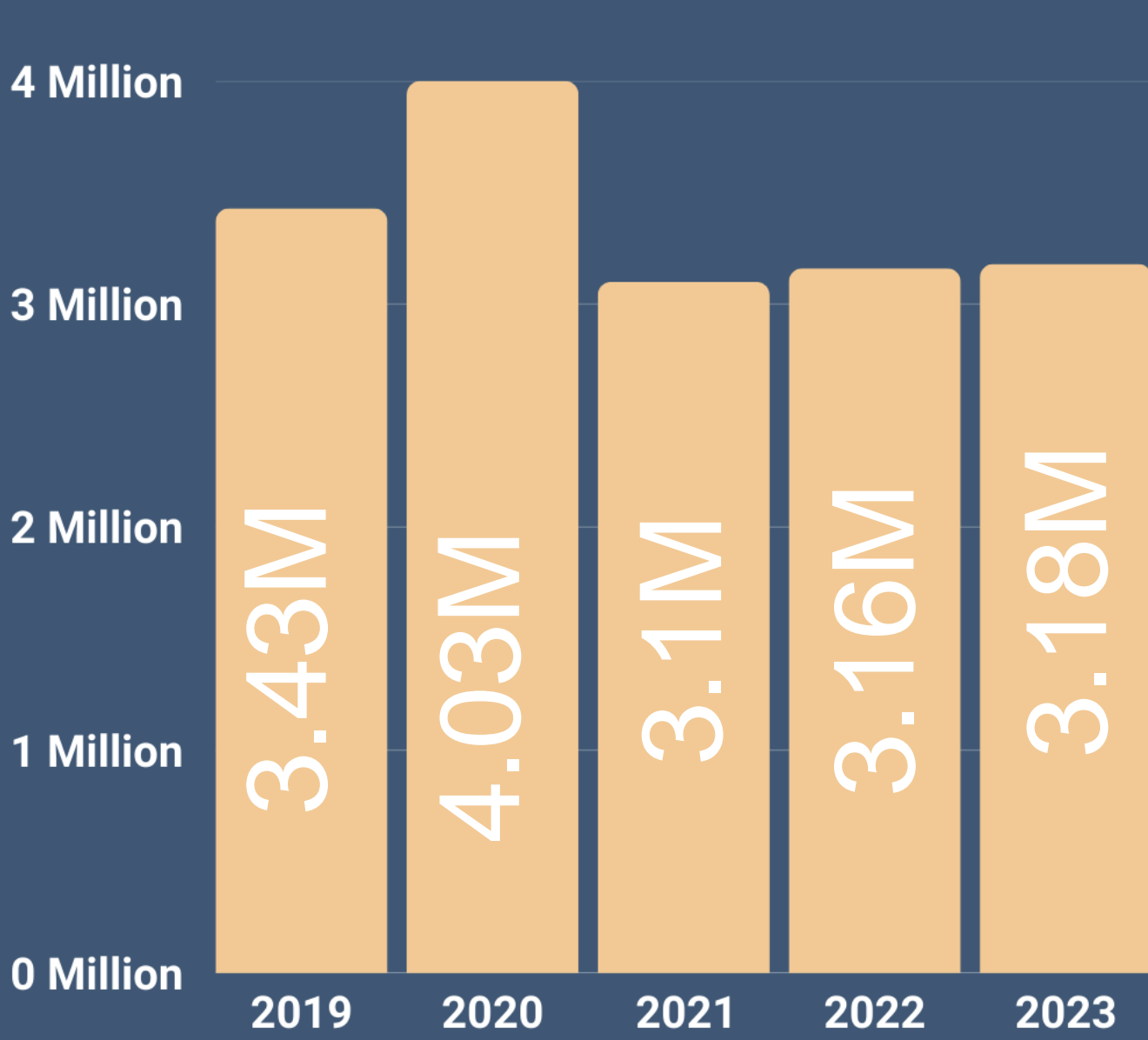
6902 of these are COR certified.

656 are certified to QU or BC provincial organic standards.




There are an additional 1315 certified to COR outside of Canada


# Certified Canadian Organic Acreage



**0.8% growth since 2022**



**7% decline since 2019**



**441,328 acres of maple**  
39% increase since 2019

**Maple accounted for 14.7% of the Canadian organic acres in 2023**

# Certified Organic Field Crops (acres)

200000

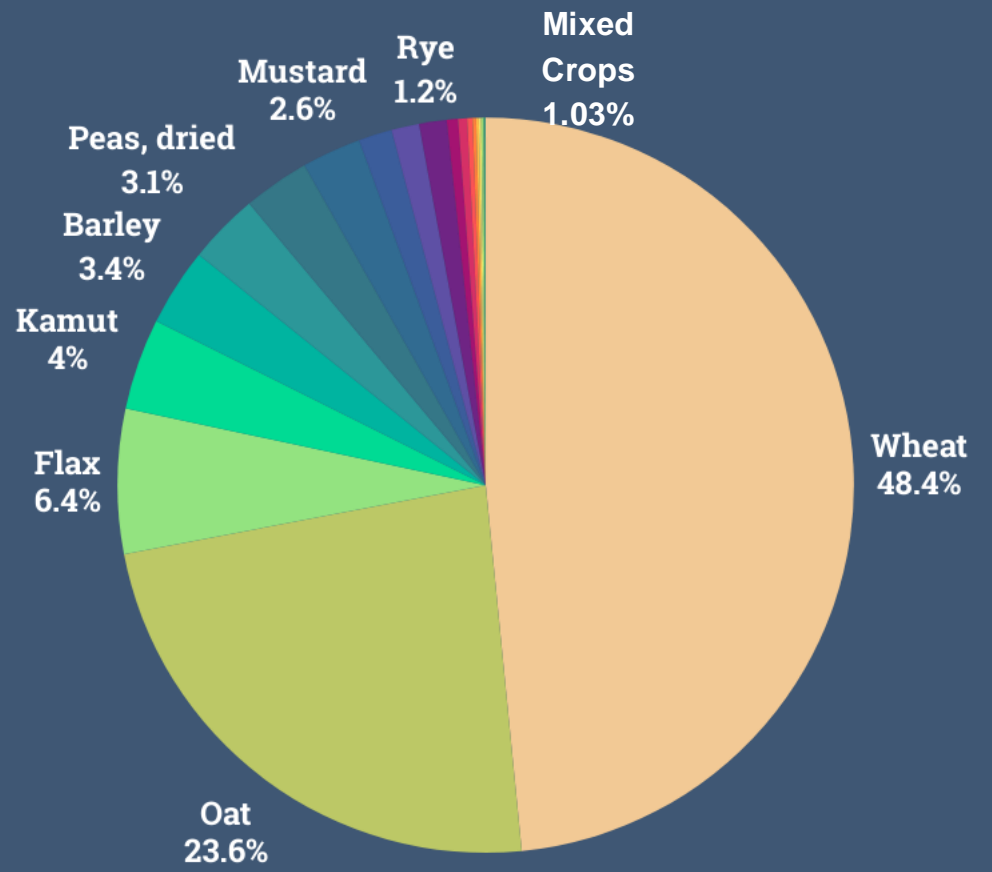
150000

100000

50000

0

Wheat Oat Flax Kamut Barley Peas, dried Lentils Mustard Hemp Beans, dried Rye Spelt Mixed Cereals Buckwheats Chickpeas Millet Canola Triticale Milkvetch Quinoa Soybeans Sunflower



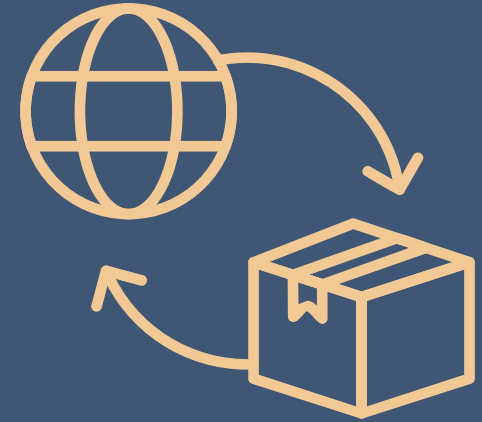
# New Import Monitoring Methods

Enforced by May 26, 2025

**Organic OGD (Other Good Data)  
Codes**

**Required to use organic codes and  
upload valid organic certificate**

# Organic Trade: Imports



\$1000.00M

\$800.00M

\$600.00M

\$400.00M

\$200.00M

\$0.00M

2019

2020

2021

2022

2023

789.10M

832.11M

859.25M

935.8M

871.5M

## \$871.5M

### IMPORTS

6.8% decrease in 2023 since 2022

\$344.8 millions are imports from the USA

# Organic Equivalency Arrangements & Growing Markets



United States of America: 2009

European Union: 2011

Switzerland: 2012

Costa Rica: 2013

Japan: 2014

Taiwan: 2020

United Kingdom: 2021

Mexico: 2023

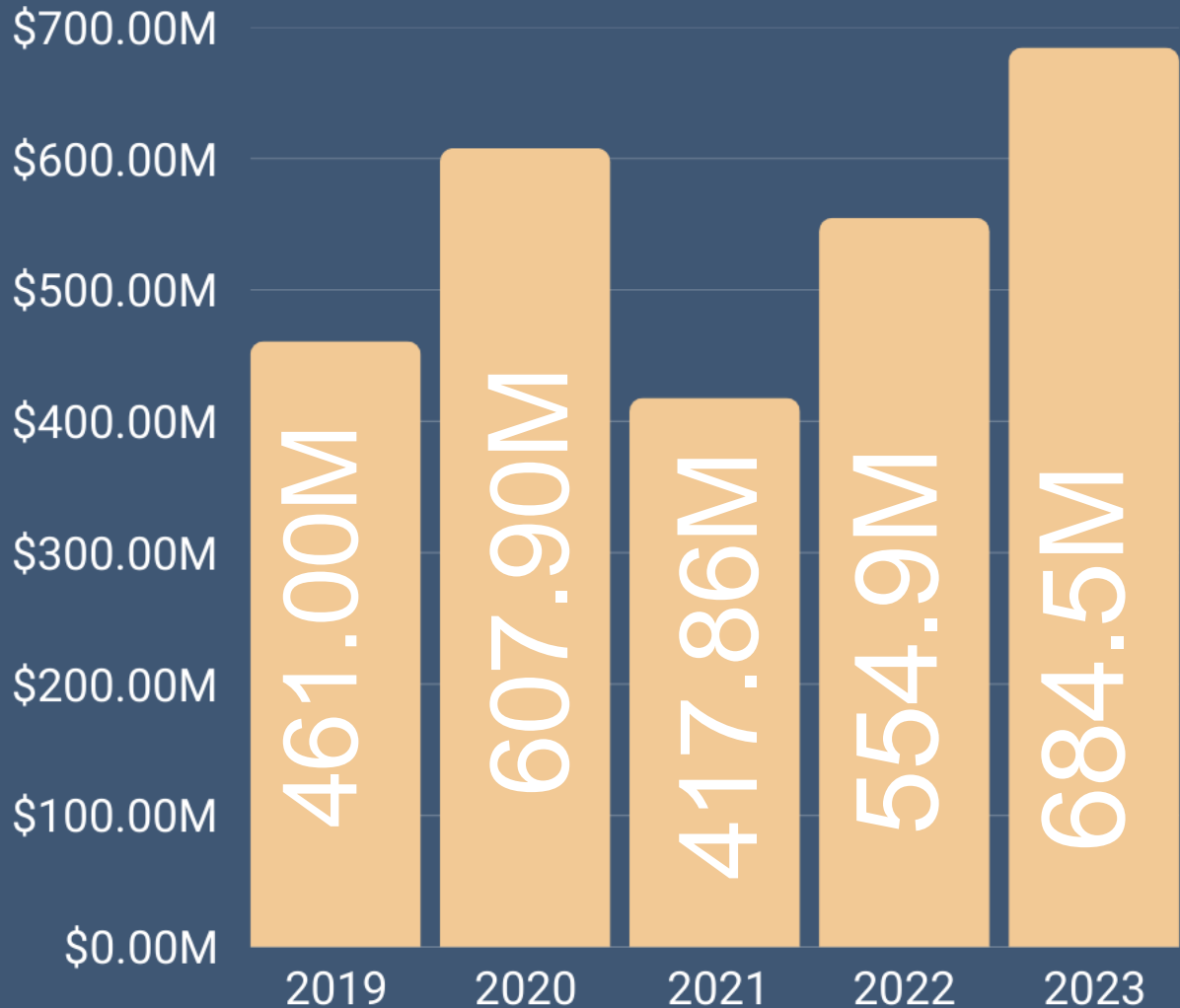
South Korea: 2023

Countries that can import from Canada without an equivalency  
arrangement

United Arab Emirates

Hong Kong

# Organic Trade: Exports

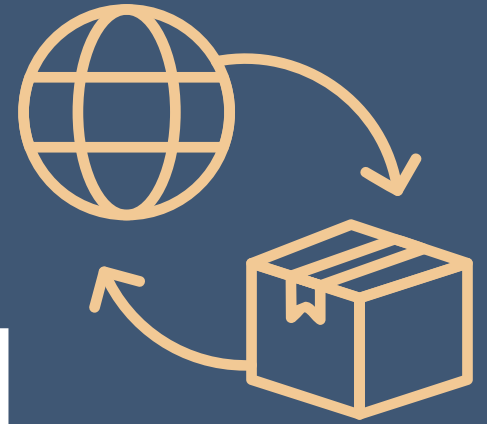


**\$684.5M**

**EXPORTS**

23% growth rate in 2023 over 2022

A blueberry export code was created in 2022 bringing the total export codes to 18





**THANK YOU!**

**Tia Loftsgard**

**Executive Director, Canada Organic Trade  
Association**

**613-482-1717 | Ext. 200 | [tloftsgard@canada-organic.ca](mailto:tloftsgard@canada-organic.ca)**

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# Organic Market Trends

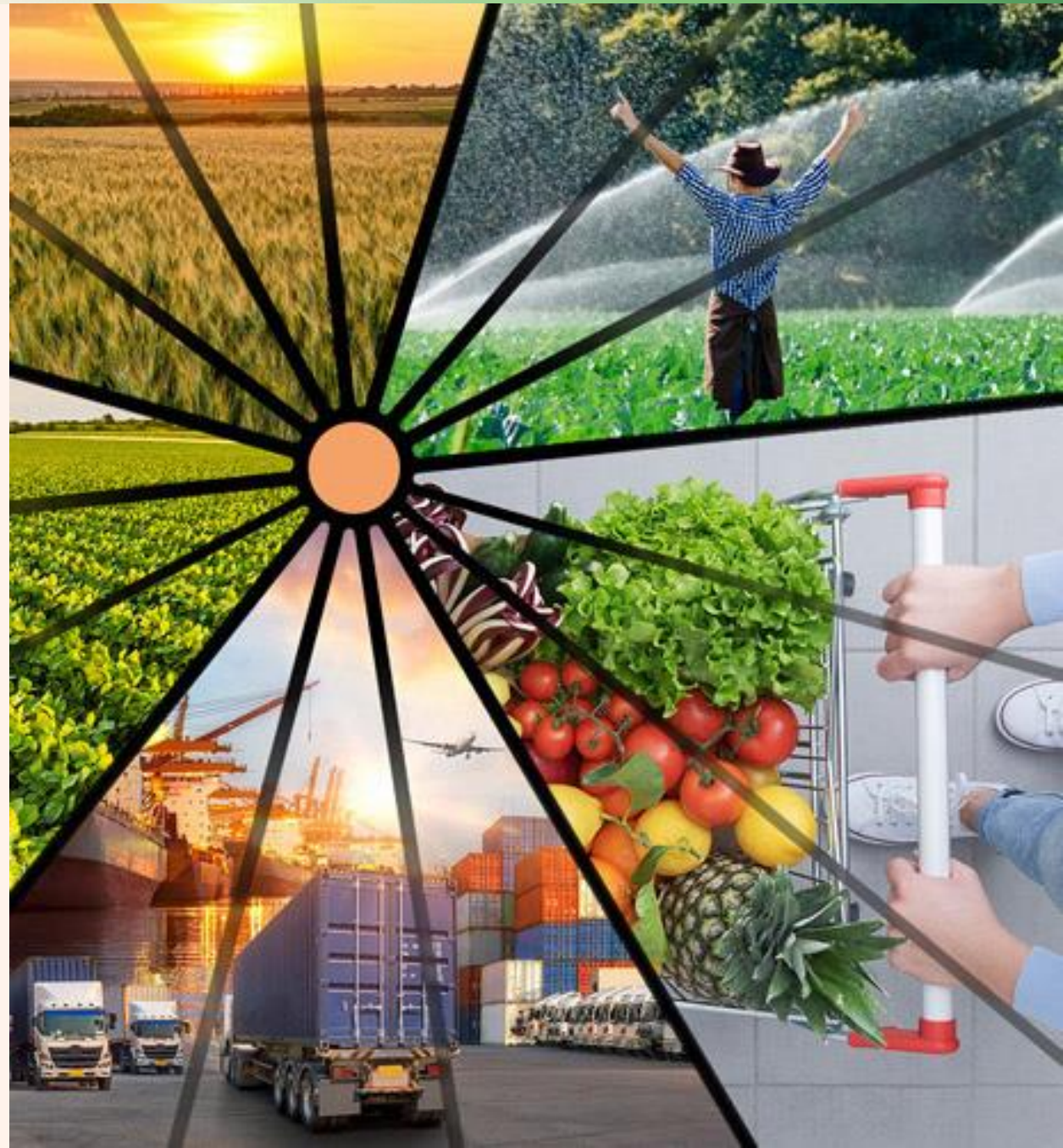
**Presented by**

**Tom Chapman**

Co-Chief Executive Officer



**ORGANIC  
TRADE  
ASSOCIATION**



# 2023 Policy Updates

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- Organic Livestock and Poultry Standards (animal welfare) effective
- Organic Market Development Grants Awarded
- National Resource Conservation Service – Organic Specialists
- Pet Food and Mushroom Standards published
- Presidential Election
- Farm Bill Extension



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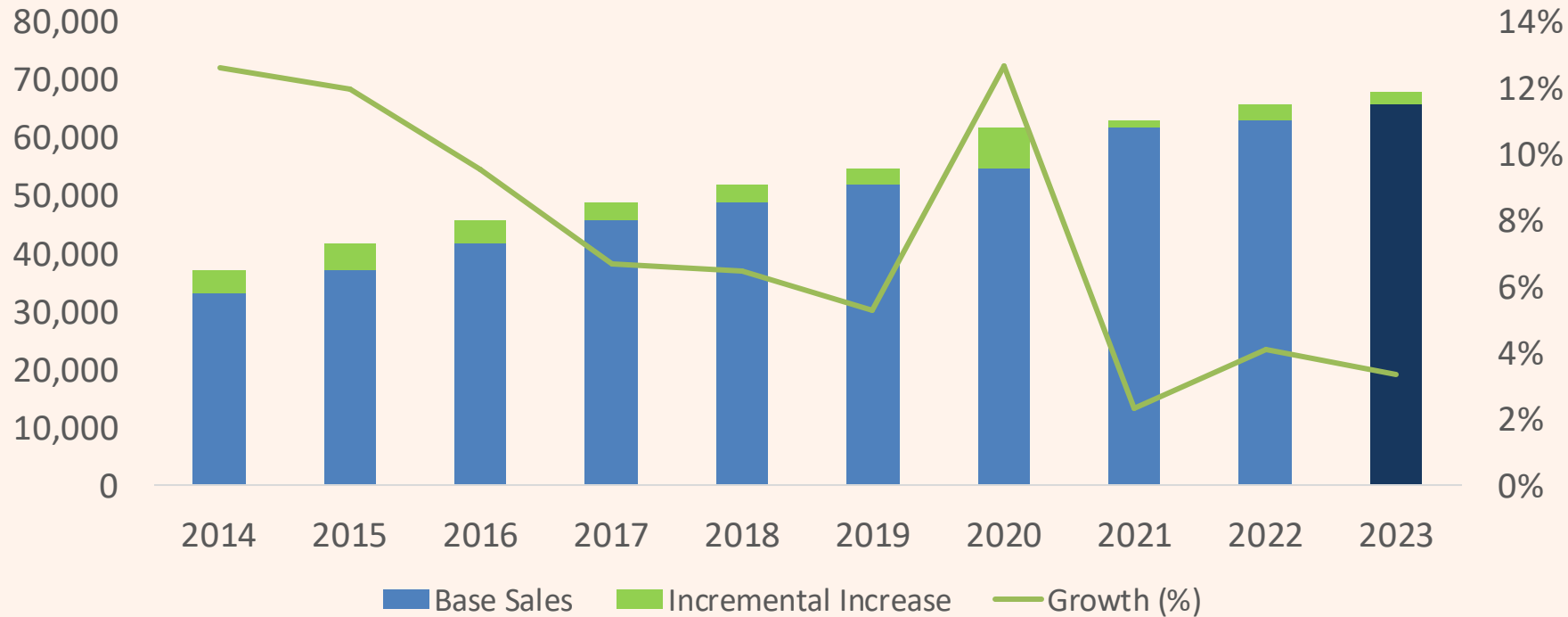
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Source: Organic Trade Association's 2024 Organic Industry Survey conducted 12/20/2023-3/29/2024 (5 mil. Consumer sales)



# Story of 2023: Market Stabilization

## Total U.S. Organic Sales and Growth, 2015-2023



## Highlights

**\$ \$68 Billion**

**↗ 3.4% Growth**

**🌿 Organic Food Growth = Total Food Growth**



# Performance Varied by Category

**U.S. Organic Sales Growth by Product Category, 2014–2023**

CATEGORY	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Produce	12.4%	10.0%	8.2%	5.4%	5.6%	4.8%	10.9%	5.8%	3.3%	2.6%
Grocery	11.9%	13.0%	11.1%	8.0%	6.1%	5.3%	16.4%	-4.2%	4.4%	4.1%
Beverages	13.1%	15.3%	12.5%	10.9%	9.5%	6.1%	13.0%	9.9%	3.9%	3.9%
Dairy & Eggs	10.8%	10.1%	6.5%	0.8%	0.7%	1.9%	11.7%	-0.8%	7.3%	5.5%
Snacks & Candy	15.5%	12.9%	7.8%	7.0%	6.9%	7.0%	2.9%	4.2%	4.2%	2.7%
Frozen	12.2%	8.8%	8.2%	5.8%	7.1%	2.2%	15.2%	-8.7%	2.7%	-0.7%
Meat, Poultry, & Seafood	12.1%	11.8%	17.2%	17.1%	11.2%	9.9%	24.7%	2.5%	5.4%	6.7%
Fiber, Supplements, HBC, & Pet	14.1%	13.0%	8.8%	7.5%	10.9%	9.4%	8.3%	7.3%	1.6%	2.9%
<b>Total Organic</b>	<b>12.5%</b>	<b>11.7%</b>	<b>9.3%</b>	<b>6.6%</b>	<b>6.3%</b>	<b>5.2%</b>	<b>12.3%</b>	<b>2.3%</b>	<b>4.0%</b>	<b>3.4%</b>

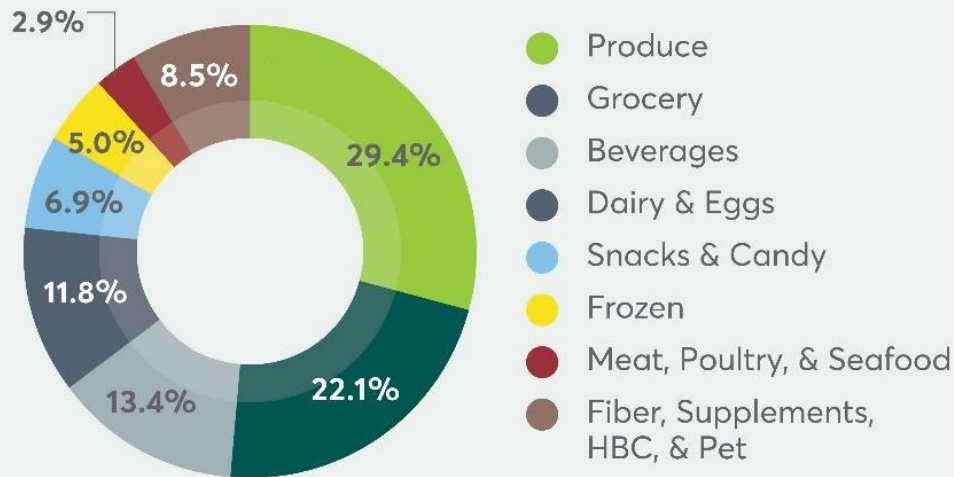
Source: Organic Trade Association's 2024 Organic Industry Survey conducted 12/20/2023–3/29/2024 (consumer sales).





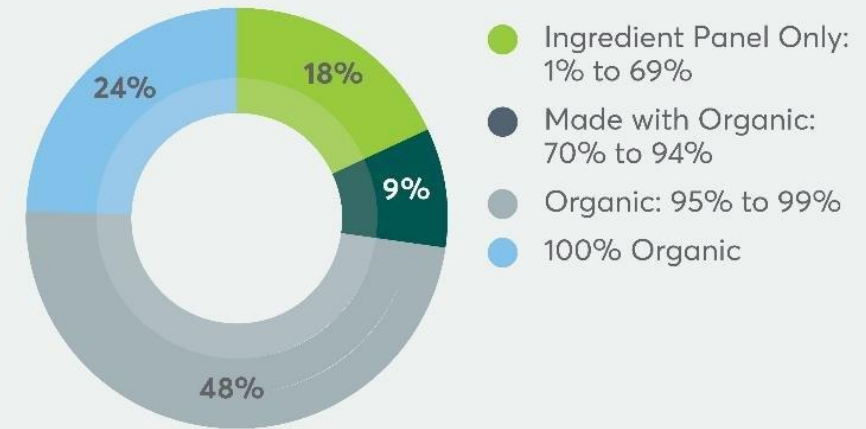
# Overview of the Organic Marketplace

## U.S. Organic Sales by Product in 2023



Source: Organic Trade Association's 2024 Organic Industry Survey conducted 12/20/2023–3/29/2024 (consumer sales).

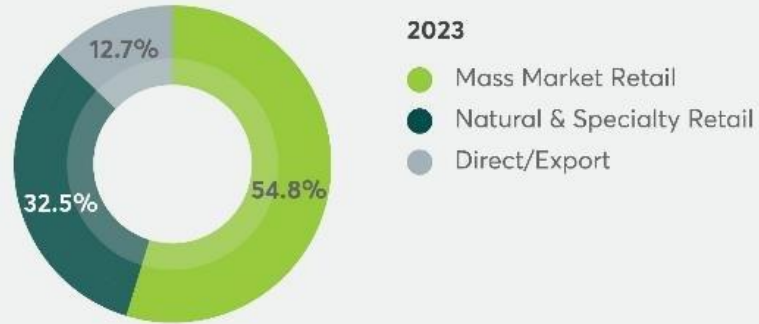
## Organic Content of U.S. Organic Branded Food Products in the Mass Market Retail Channel



Source: SPINS, Sales in the MULO channel by Labeled Organic attribute, 52-weeks end 12/31/2023



## U.S. Organic Food Sales by Channel, 2014 vs. 2023



MASS MARKET RETAIL	2014	2023
Mass-market Grocery	34.4%	33.7%
Club/Warehouse Store	11.2%	14.1%
Mass Merchandiser	6.0%	6.1%
Convenience Stores	0.3%	0.9%
NATURAL & SPECIALTY RETAIL	2014	2023
National Natural Grocery Chain	20.6%	18.3%
Regional Natural/Health Food	17.1%	12.8%
Boutique/Specialty	0.7%	1.4%
DIRECT/EXPORT	2014	2023
Internet	2.1%	6.6%
Farmers' Market/Co-op/CSA	5.2%	4.3%
Direct Export	2.0%	1.6%
Mail Order/Other Direct	0.3%	0.2%

Source: Organic Trade Association's 2024 Organic Industry Survey conducted 12/20/2023–3/29/2024 (consumer sales).

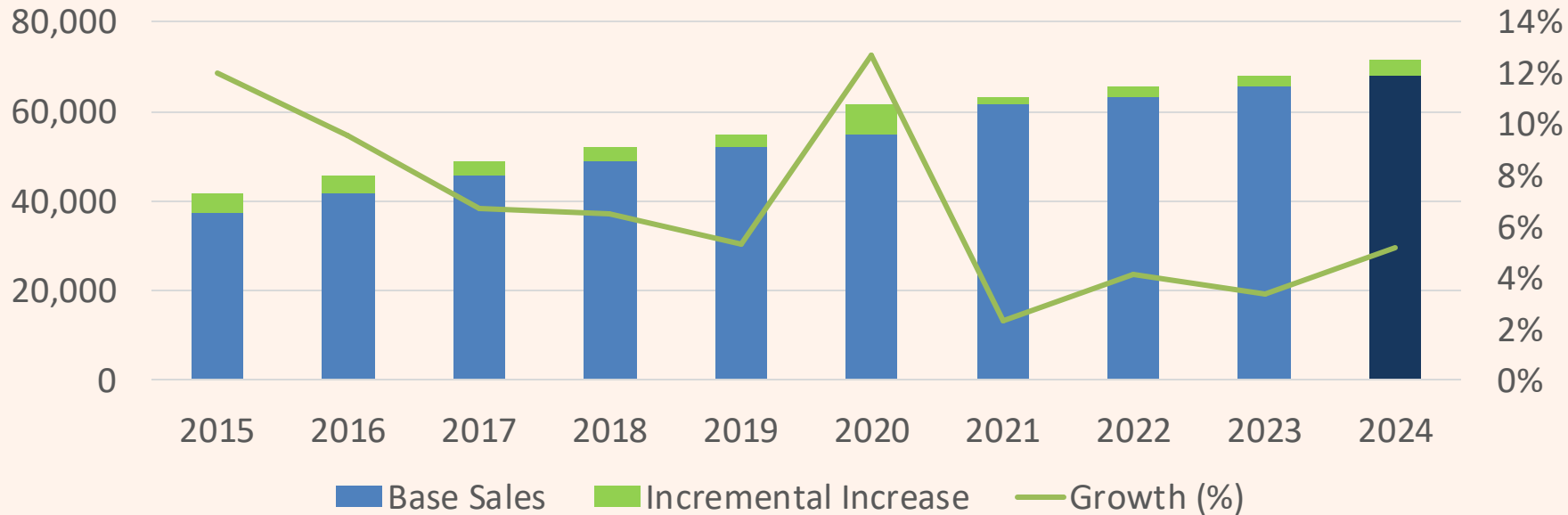
# Organic Channel Shakeup





# 2024 Organic sales eclipsed \$71.5B USD (69.4 € Billion)

## Total U.S. Organic Sales and Growth, 2015-2024



### Highlights

**2x** Organic Growth/  
Total Growth

**6.1%** Organic CAGR for the  
last decade

Source: Organic Trade Association  
Organic Market Report 2025





# Over 20 subcategories have more than \$1 B+ sales

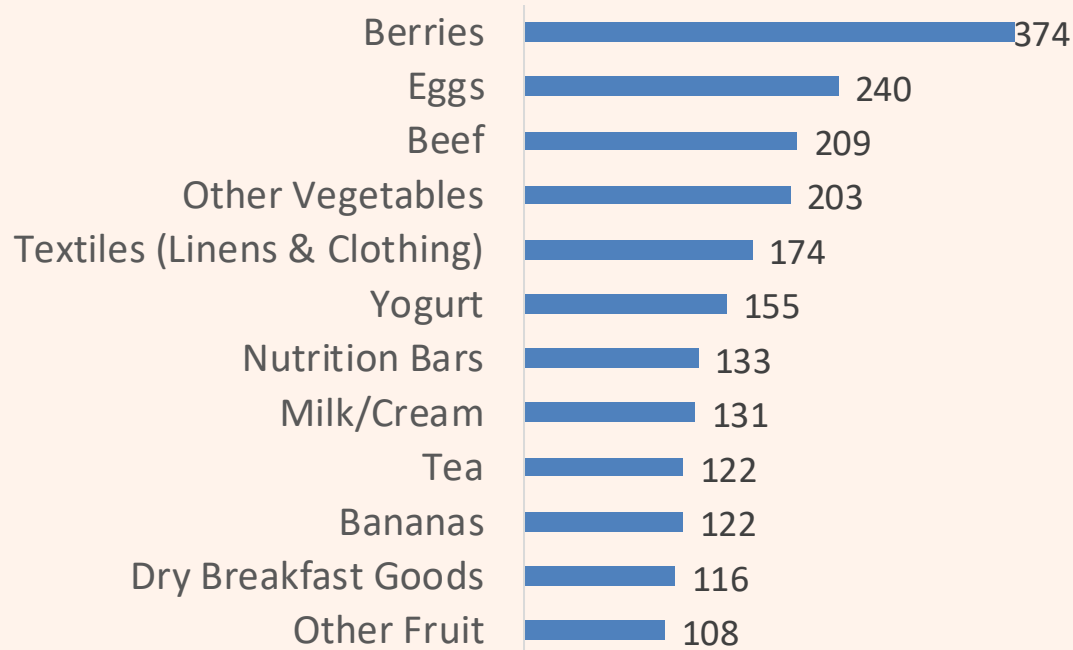


Source: Organic Trade Association  
Organic Market Report 2025

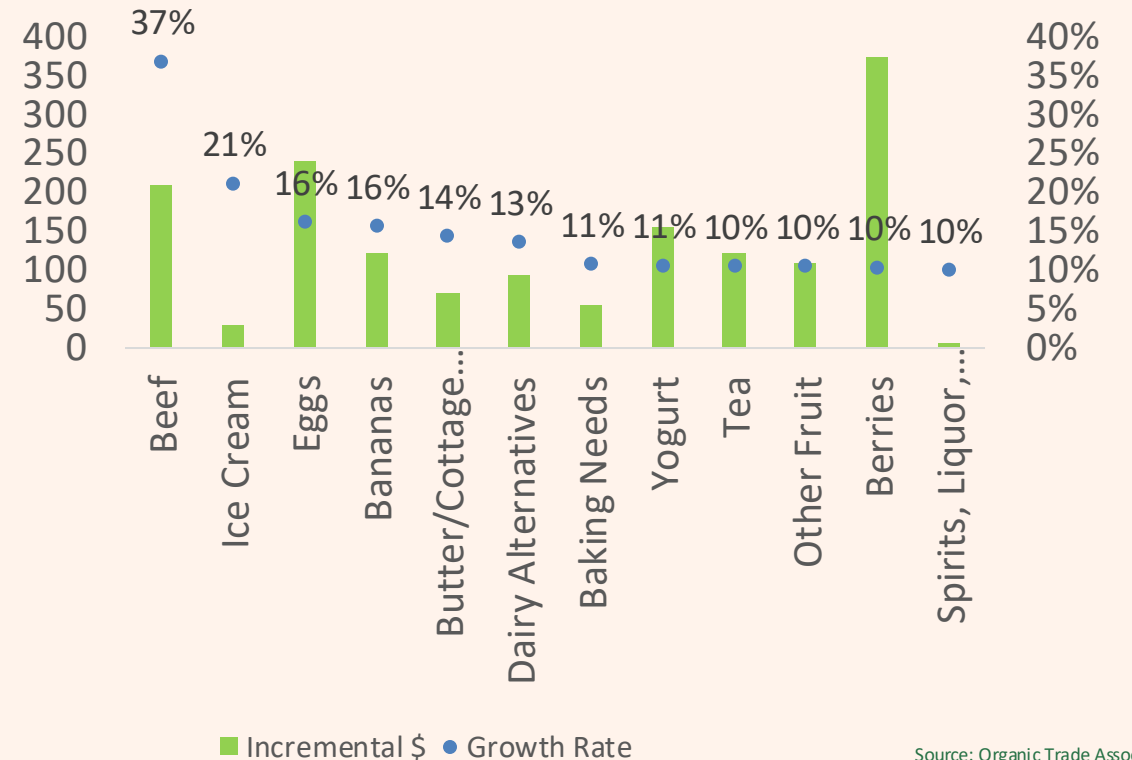


# Top 12 categories in 2024

### Top 12 U.S. Organic Subcategories by Dollar Increase



### Top 12 U.S. Organic Subcategories by Growth rate

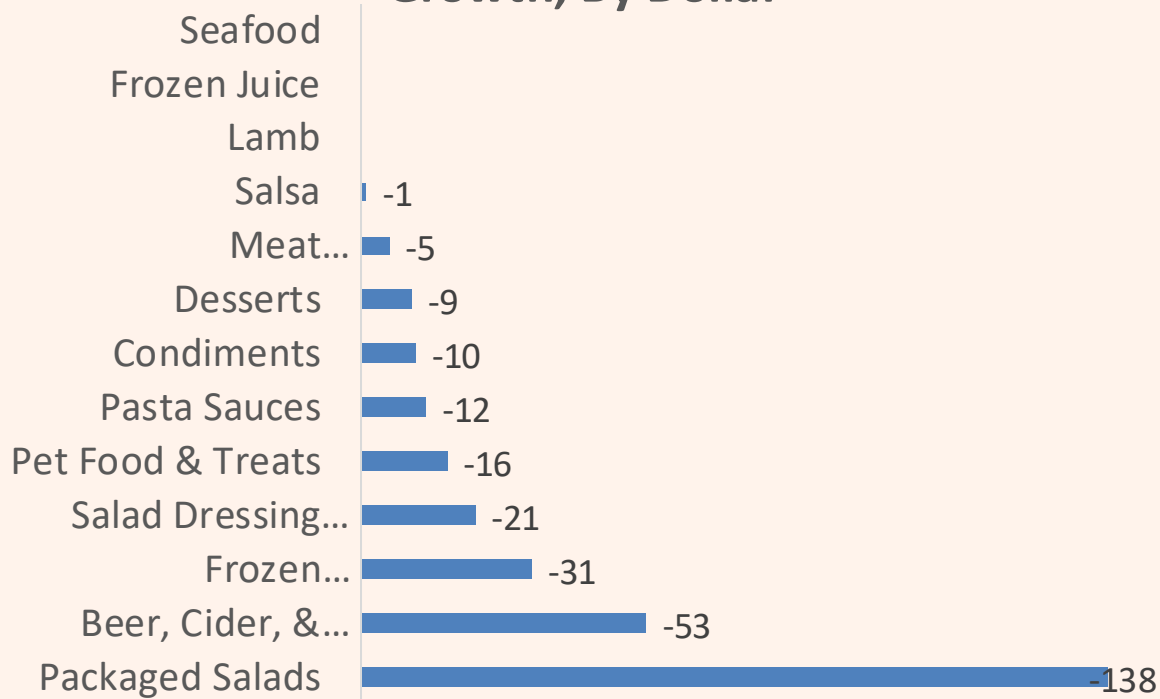


Source: Organic Trade Association  
Organic Market Report 2025

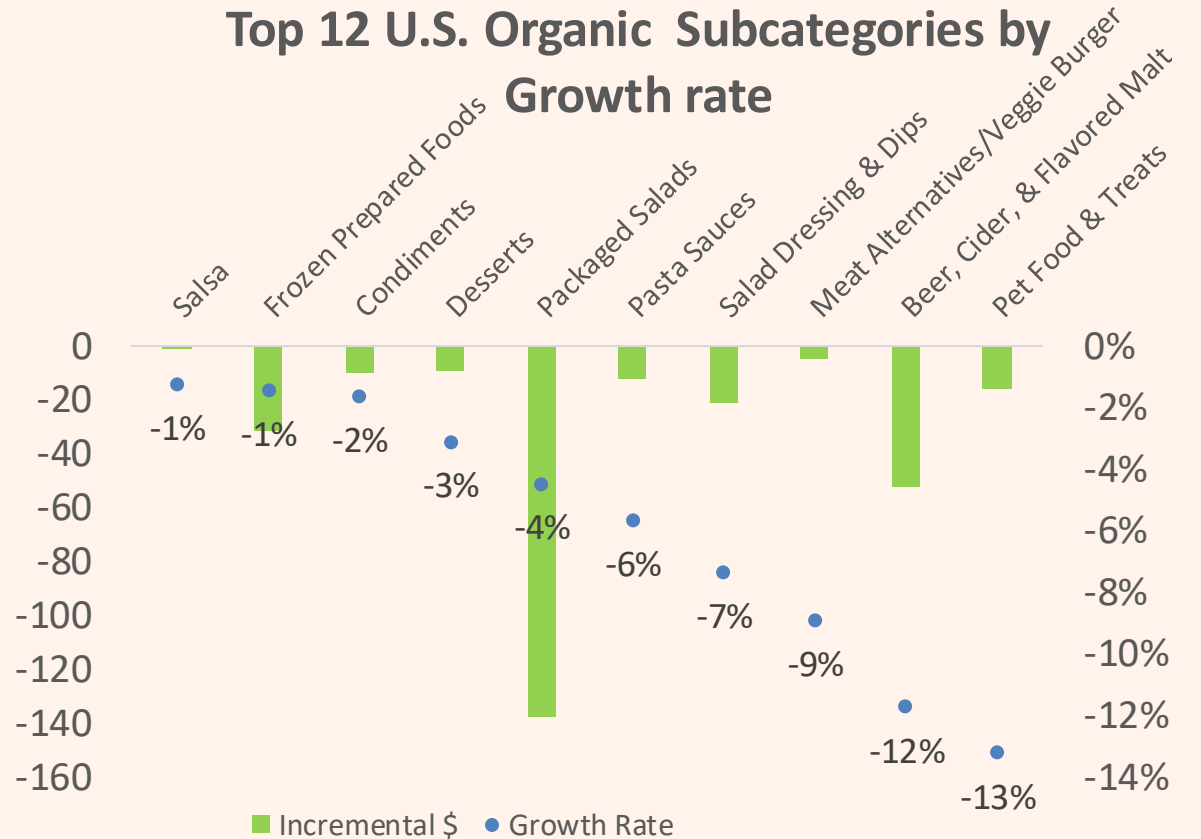


# Bottom 10 categories in 2024

### U.S. Organic Subcategories with No Growth, By Dollar



### Top 12 U.S. Organic Subcategories by Growth rate

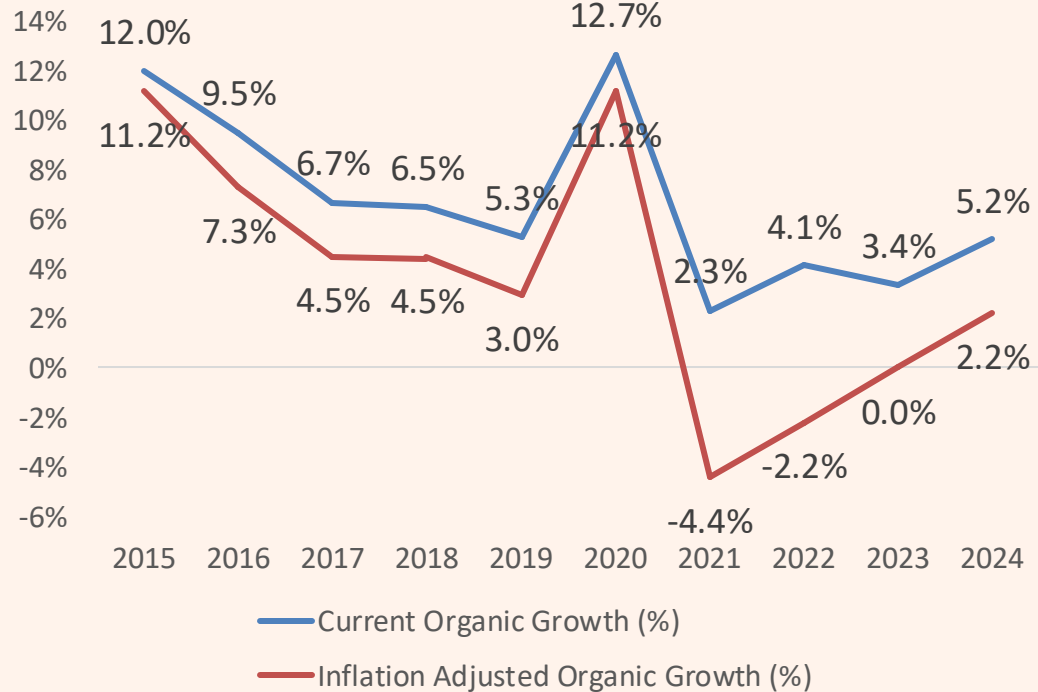


Source: Organic Trade Association  
Organic Market Report 2025

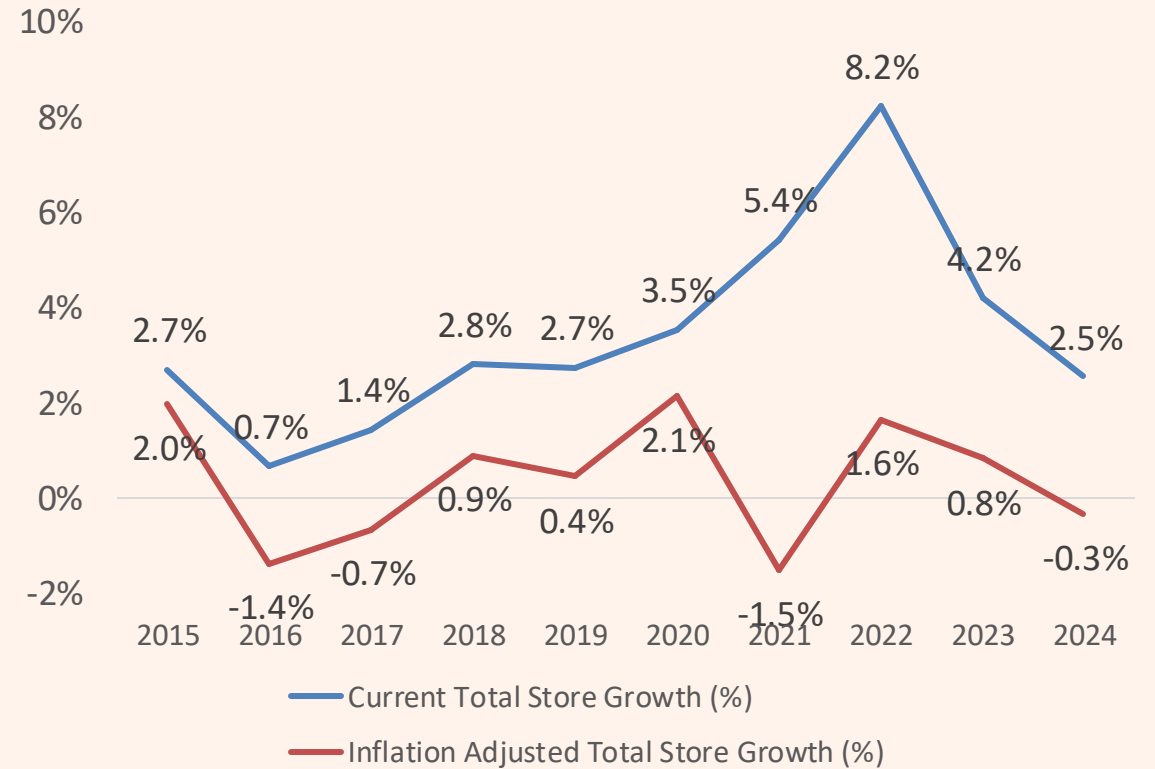


# Impact of Inflation

## U.S. Organic Growth, Current vs. Inflation Adjusted



## U.S. Total Store Growth, Current vs. Inflation Adjusted

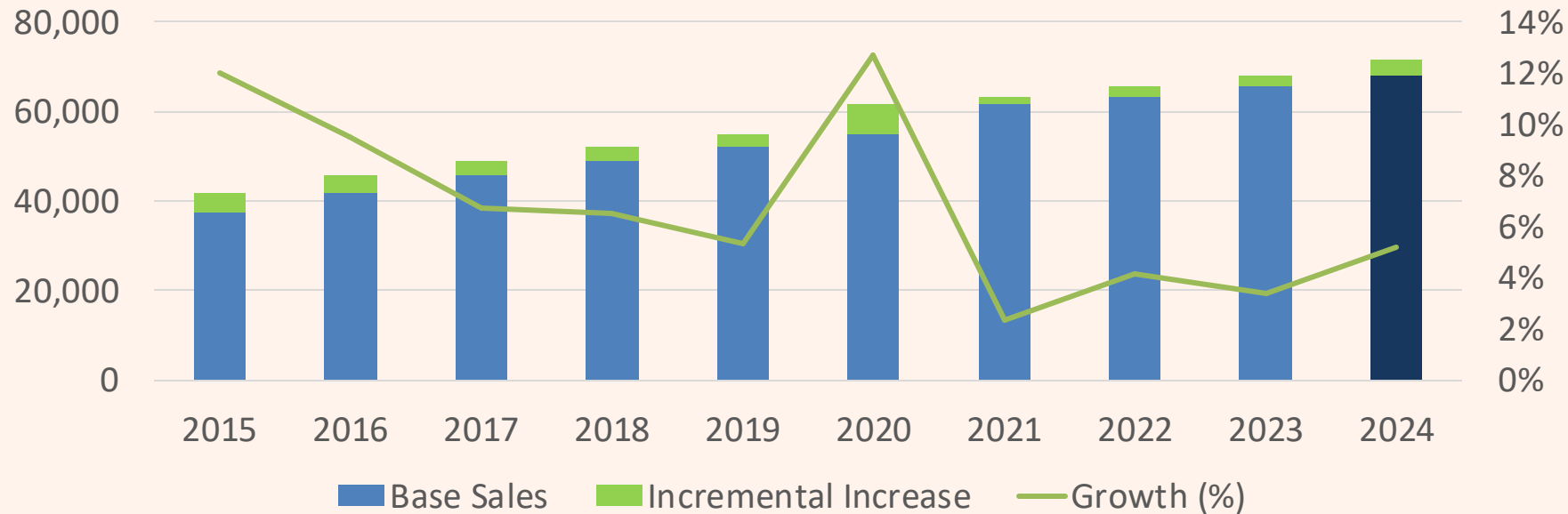


Source: Organic Trade Association  
Organic Market Report 2025



# Organic Growth Forecast

## Total U.S. Organic Sales and Growth, 2015-2024



### Highlights

Organic Sales Forecasted to

↑ **\$100B**

by 2033

Source: Organic Trade Association  
Organic Market Report 2025





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ASSOCIATION**



**THANK YOU!**

**Tom Chapman**

**CO-CHIEF EXECUTIVE OFFICER**

*Phone:* (202) 735-1232

*Email:* [tchapman@ota.com](mailto:tchapman@ota.com)



# Global Organic Market: **OCEANIA**

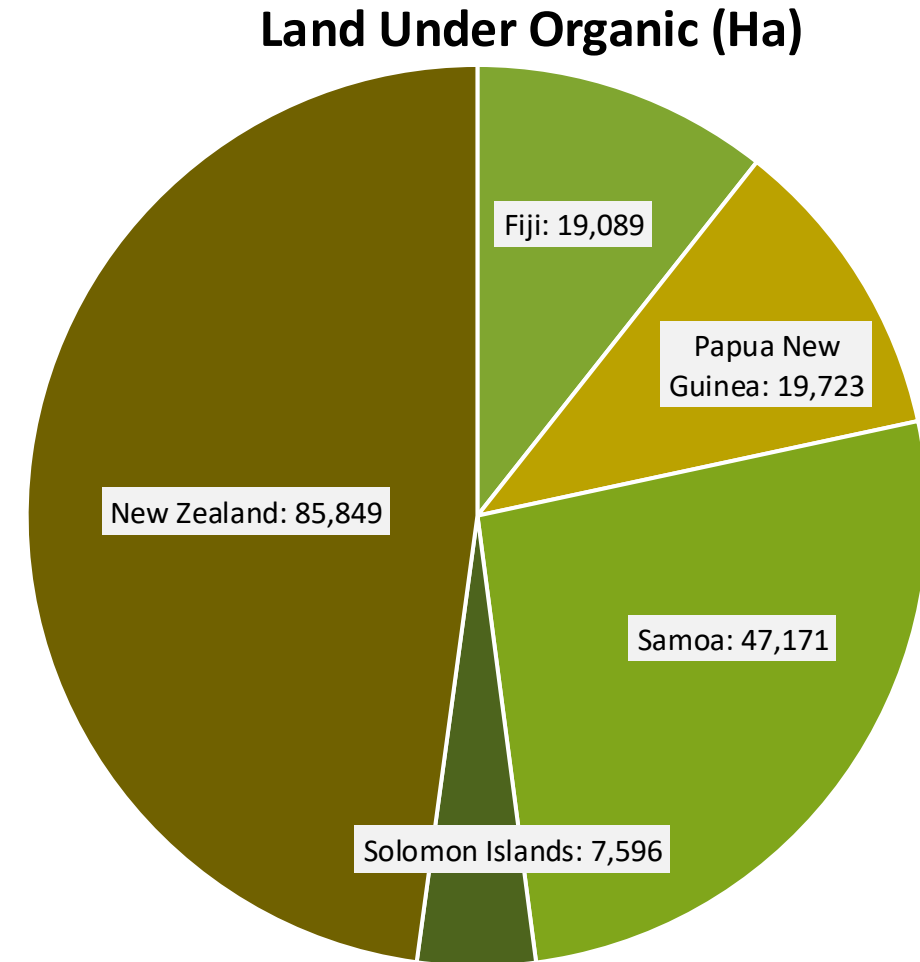
Josefine Pettersson

Operations and Technical Manager

12th February 2025

# Oceania: Overview

- Australia, New Zealand and the Pacific Islands states
- Over 24,000 producers
- 14.3% of the region's agricultural land under organic
- Participatory Guarantee Systems (PGS) play a significant role in the Pacific Islands
- 4/14 countries have legislation on organic agriculture



*FIBL 2022 data; OANZ 2021 data*



# Pacific: Organic Overview

## Hectares of Certified Organic Land (FiBL 2022)

- 105,127 hectares across 6 countries
  - 91% Third-party certified
  - 9% Participatory Guarantee Systems (PGS)

## Total Organic Producers (FiBL 2022)

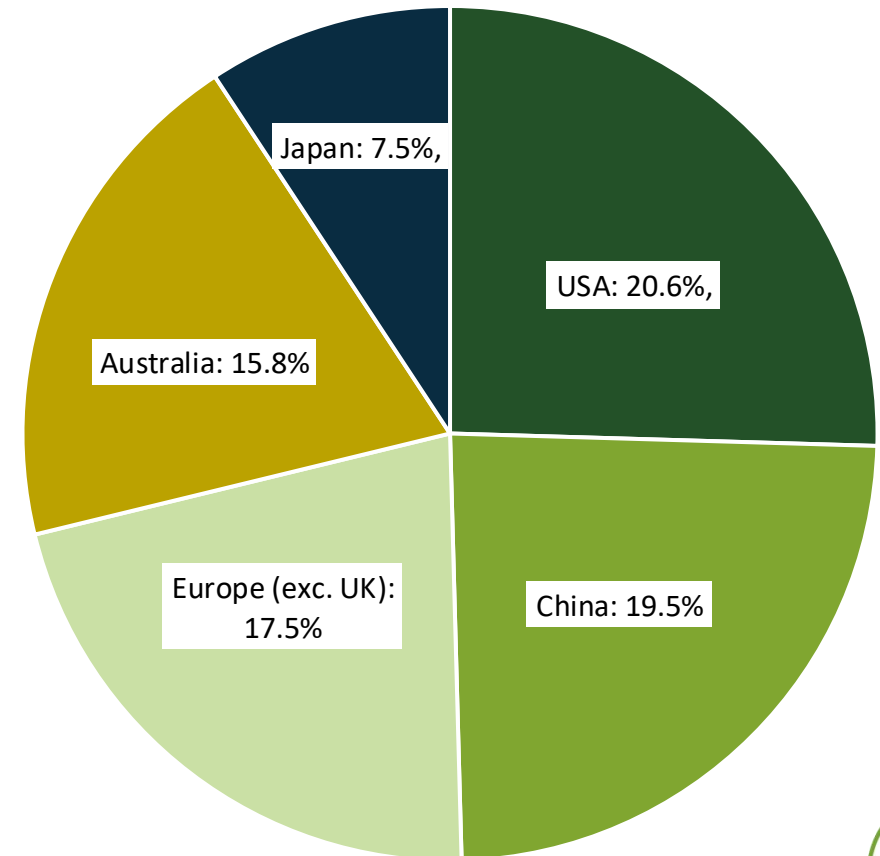
- 22,437 across 6 countries
  - 22,082 certified organic
  - 355 under PGS



# New Zealand: Overview

- \$723+ million NZD Market Value
- Supermarket sales account for 69% of purchases
- 85,849 Ha certified organic over 1,870 operations
  - 40% of farmland dedicated to dairy production
- 10% of wineries hold organic certification
  - 25% for Central Otago region

Top 5 Organic NZ Export Markets



OANZ 2021 data

# New Zealand: Key Organic Sectors

## Dairy

\$153.8 million

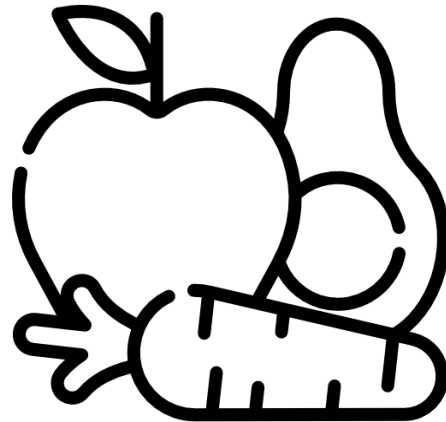
+55% since 2017



## Fruit & Vegetables

\$143 million

+6% since 2017



## Wine

\$65 million

+40% since 2017



# New Zealand: Policy Considerations

- **Organic Products and Production Act 2023**

- Enacted on April 6, 2023, establishes a regulatory framework for organic claims and businesses

- **Development of National Organic Standards**

- Rewriting NZ Organic standards as part of regulatory framework

- **Gene Technology Amendment Bill**

- GM moratorium --> most lenient GE regulations globally
- Public submissions open till 17th February --> OANZ website

- **Food Standards Australia New Zealand (FSANZ) Proposal P1055**

- Redefining gene edition and other technologies as 'New Breeding Technologies' not GM
- Removing risk-based pre-market assessment for any gene editing that does not contain novel DNA



# Australia: Domestic Insights



**53,016,058 ha**  
Total area of production<sup>b</sup>



**3,035**  
Certified organic  
businesses in Australia<sup>c</sup>

**95%**  
are fully certified organic<sup>b</sup>

**5%**  
are in conversion<sup>b</sup>

Top sectors by value added<sup>a</sup>



**36%**  
Beef/veal



**10%**  
Wine grapes



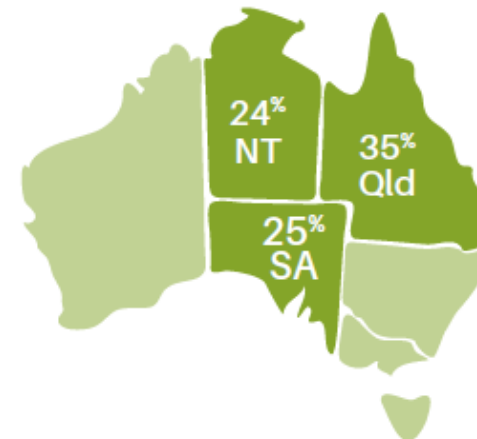
**9%**  
Broadacre crops

**National**

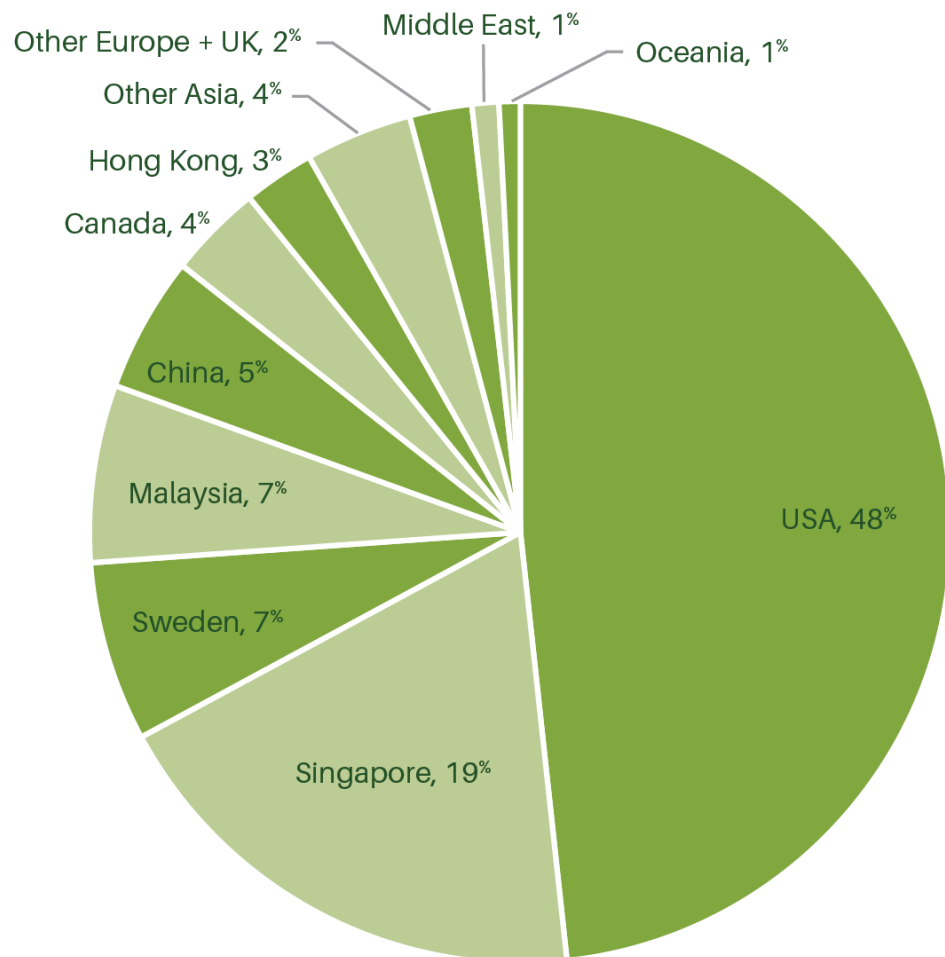


\$851 million direct contribution  
\$2,631 million total contribution\*  
12,434 direct full-time equivalents (FTEs)  
22,311 total FTEs\*

Top 3 states in area of  
organic production<sup>b</sup>



# Australia's Top Export Destinations



Australian Organic Market Report 2023

## Raw product



**8,041 t**

total export volume  
of raw products<sup>b</sup>



**Singapore,  
USA, Malaysia**

top export  
destinations<sup>b</sup>

## Processed product



**12,394 t**

total export volume of  
processed products<sup>b</sup>



**USA,  
China, Sweden**

top export  
destinations<sup>b</sup>



# Australia: A Leader in Regenerative Organic

## Currently certified in Australia

- 7,174,530.41 hectares over 31 farms

## Awaiting Certification Decisions

- 7,582,995.52 hectares

## Globally

- 7,473,117.7 hectares over 307 farms

- **~96%+ of ROC-certified Farmland is in Australia**



# Australia: Ongoing GM Work

- **FSANZ Proposal P1055**

- Weakens **truth in labelling** by excluding certain gene-editing techniques (New Breeding Techniques) from GM classification and labelling.
- Applies to any gene editing with non-novel/same species DNA.

- **Draft Gene Technology Amendment Bill**

- Deregulates low-risk (same species) GMOs, **increasing contamination risks**.
- **Higher costs** for testing & compliance, **Loss of certification** if contamination occurs

- **Minor Amendments Bill**

- Expands the definition of **non-GM** to include gene-editing techniques like **RNA interference (RNAi)**, which temporarily silences genes. Unlike traditional GMOs, RNAi leaves no permanent DNA changes, making regulation unclear.

➤ ***Need for coordinated strategies and resources to protect the organic sector***











Australian Organic Limited, 18 Eton Street, Nundah QLD 4012  
contact@austorganic.com | 07 3350 5716 | austorganic.com



# The Organic Market in Latin America

Biofach 2025  
12th February

Global Market View



Thales Bevilacqua Mendonça  
Organic Farmer  
Global Relationships Manager - INOFO

# Quick overview

- Over **249'000 organic producers**, nearly 21'293 organic producers less than in 2022;
- Nearly over **10.3 million hectares** were reported in 2023 (11% of global organic land but only 1.6% of the agricultural land in the region). In 2023, the agricultural land has increased more than 1 million ha;
- **Argentina** (4.1 million hectares) and **Uruguay** (3.6 million hectares) - **Mainly grassland**
  - However, **temperate fruits** represent a big share of the organic exports of these countries
- Uruguay had the highest **organic share 25.4%**;
- Bananas, sugar, vegetables and coffee are most exported organic products;
- More than 14 countries have **PGS** system in place. **10 countries** recognized and regulate it;

There is still a **lot of growth potential** in the region as organic takes only **1.6%** of the agricultural land

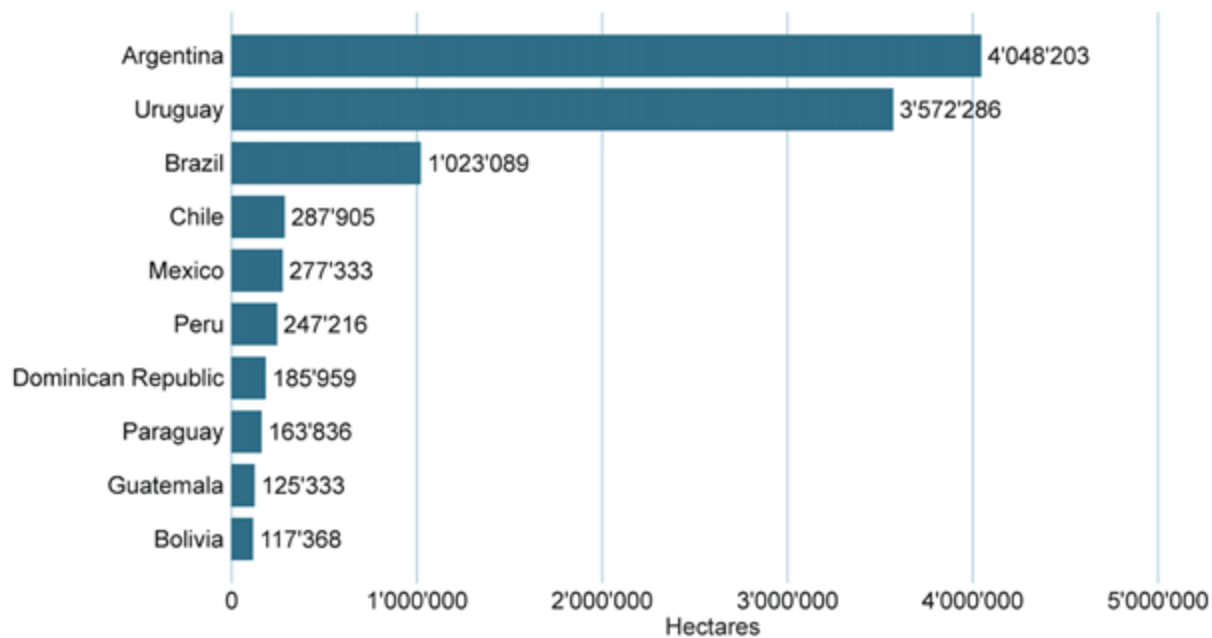


**Industrial agriculture has a big lobby power** in Latin America, especially with the governments

**Peru** continues to have the largest number of organic producers in Latin America and is placed **6<sup>th</sup> worldwide!**

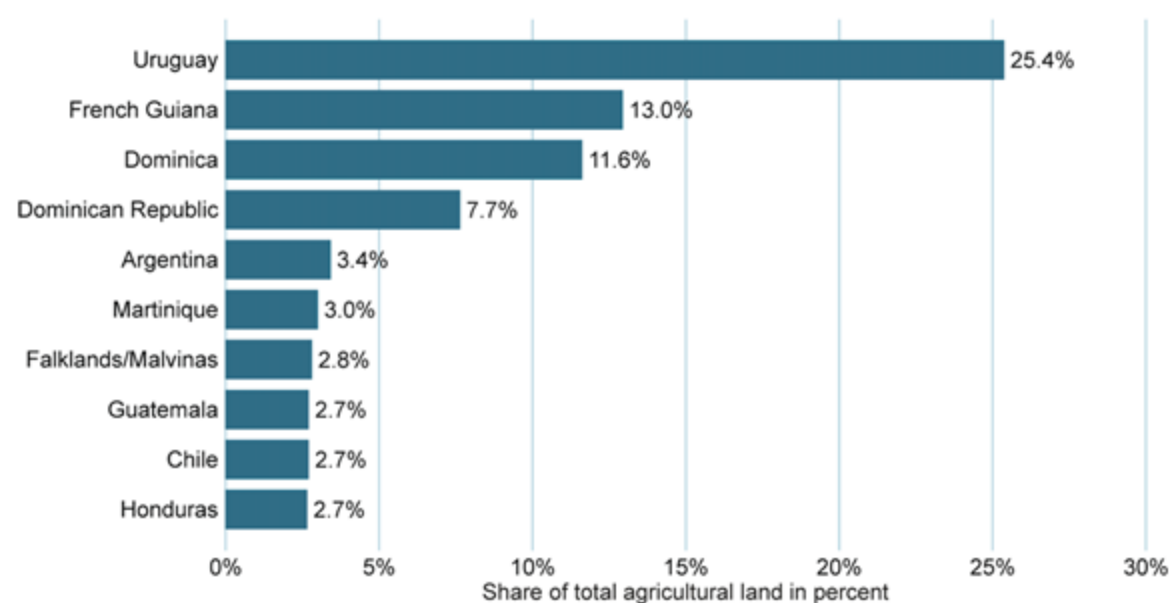
### Latin America and Caribbean: The ten countries with the largest organic agricultural area 2023

Source: FiBL survey 2025



### Latin America and Caribbean: The ten countries with the highest organic share of total agricultural land 2023

Source: FiBL survey 2025



Source: FiBL survey 2025 **FiBL**

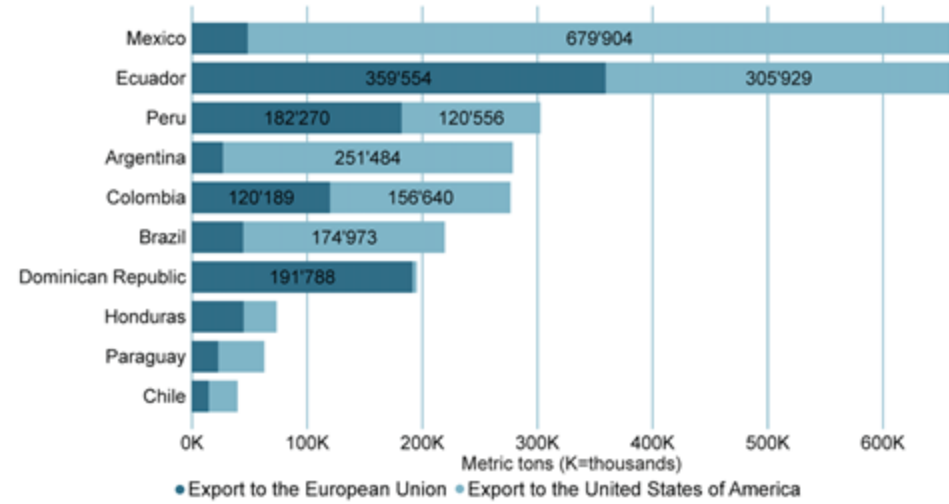
The **organic area growth** has been quite stable over the year – some ups and downs mainly due to Argentina's grassland

**LAC region**, has increased 10.8% the organic farmland in 2023. **Uruguay** (+ 30.3%) showed a significant growth.



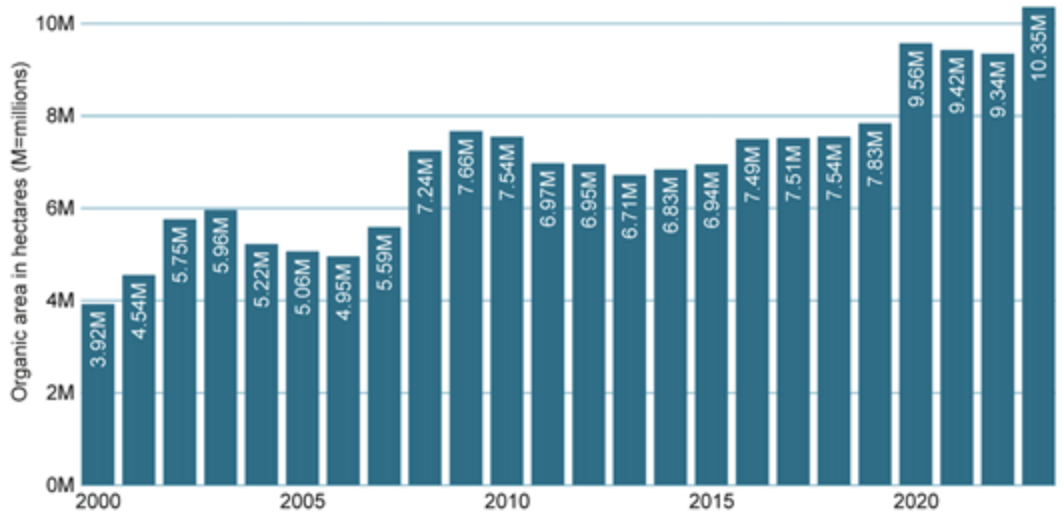
**Latin America: Key EU and US export countries in 2023**

Source: Traces/European Commission 2024, GATS/USDA 2024



**Latin America and Caribbean: Development of organic agricultural land 2000 - 2023**

Source: FiBL-IFOAM-SOEL surveys 2001-2025



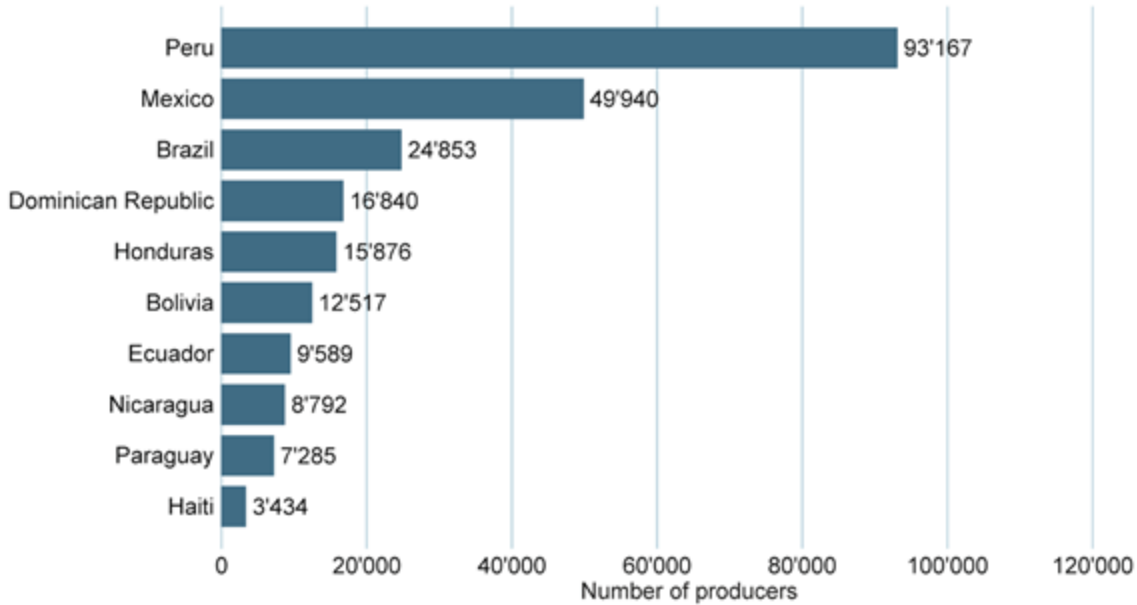
Source: FiBL survey 2025

Some countries are **big players** in the global organic trade. **Mexico was the largest exported** to EU and US, followed by **Ecuador** and **Peru**.

According to the available data, LA exports to EU and US 2.9 million of products - 55.8% of all organic exports to these countries.

## Latin America and Caribbean: The ten countries with the largest number of organic producers 2023

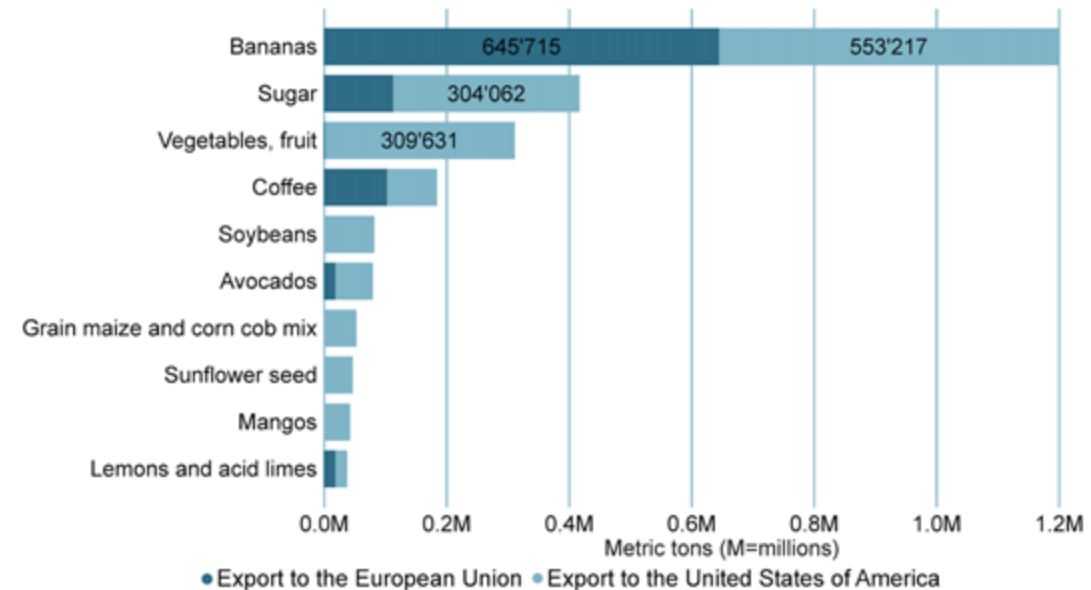
Source: FiBL survey 2025



Peru, the Dominican Republic and Mexico are the largest producers of **coffee, cocoa and tropical fruits** in Latin America, and are among the largest in the world

## Latin America: Key commodity groups exported to the EU and US in 2023

Source: Traces/European Commission 2024, GATS/USDA 2024



**Coffee** as well as cocoa, tropical fruits and cereals are the main crop group - Most of it is for export

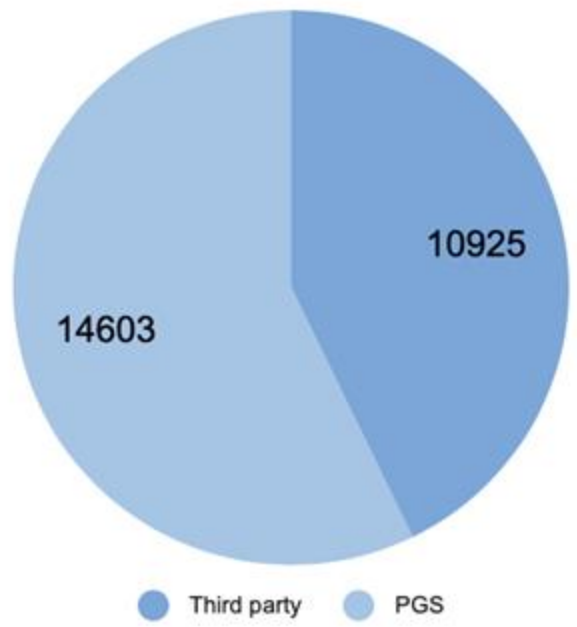
However, **the regional demand for these crops is increasing**

Source: FiBL survey 2025

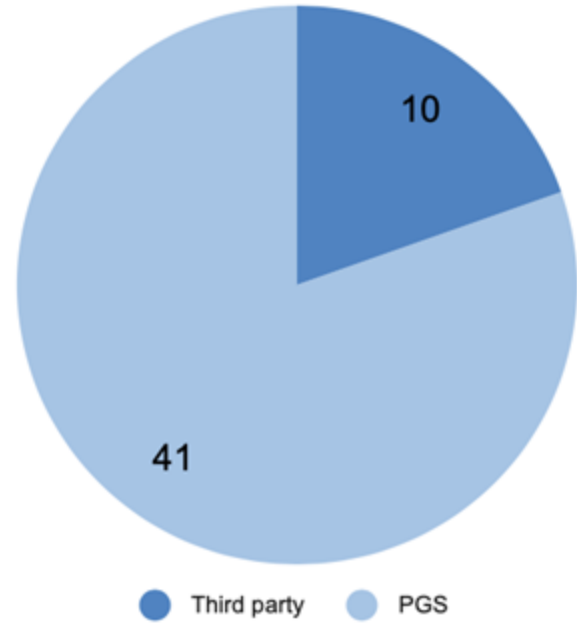


# Organic certification in Brazil

Families / Farms Certified - 25.528 Total



Certification Bodies - 51 total



<https://www.gov.br/agricultura/pt-br/assuntos/sustentabilidade/organicos/cadastro-nacional-produtores-organicos>





- **Growing domestic organic market**

**Brazil** has the largest domestic market for organic products in Latin America

Missing data – no collection systems

Bigger **diversity of products** – including products from other countries in the region

- **PGS leadership**

Latin America has the strongest PGS movement in the world, inspiring different regions and many countries; The first PGS export recognition has been done between Brazil and Chile.

- **Organic recognitions**

For the last years, some countries such as **Brazil** and **Argentina** has celebrate the **Organic Day** and award the best organic initiatives in the country. Each year more initiatives are joining and sharing their experiences.

- **Political and social instability** in the region

all stakeholders need our **support the situation is not easy, specially for small farmers and small entrepreneurs!**





# Together, we thrive. THANK YOU!

- **Unlock partnerships for impactful growth now!**
- **Explore diverse competencies of organic farmers.**
- **Support with your donation!**

CONTACT:

Thales Bevilacqua Mendonça  
Organic farmer  
[global-relationships@info.bio](mailto:global-relationships@info.bio)  
[www.info.bio](http://www.info.bio)

12/02/2025

Intercontinental Network Of Organic Farmer Organisation - INOFO



# China's Organic Product Market Overview

Zhang Youting / 张友廷

Organic and Beyond Corporation / 正谷（北京）农业发展有限公司

The Organic Professional Committee of CCAA / 中国认证认可协会有机专委会

## Overview of Organic Product Certification in China (2023)



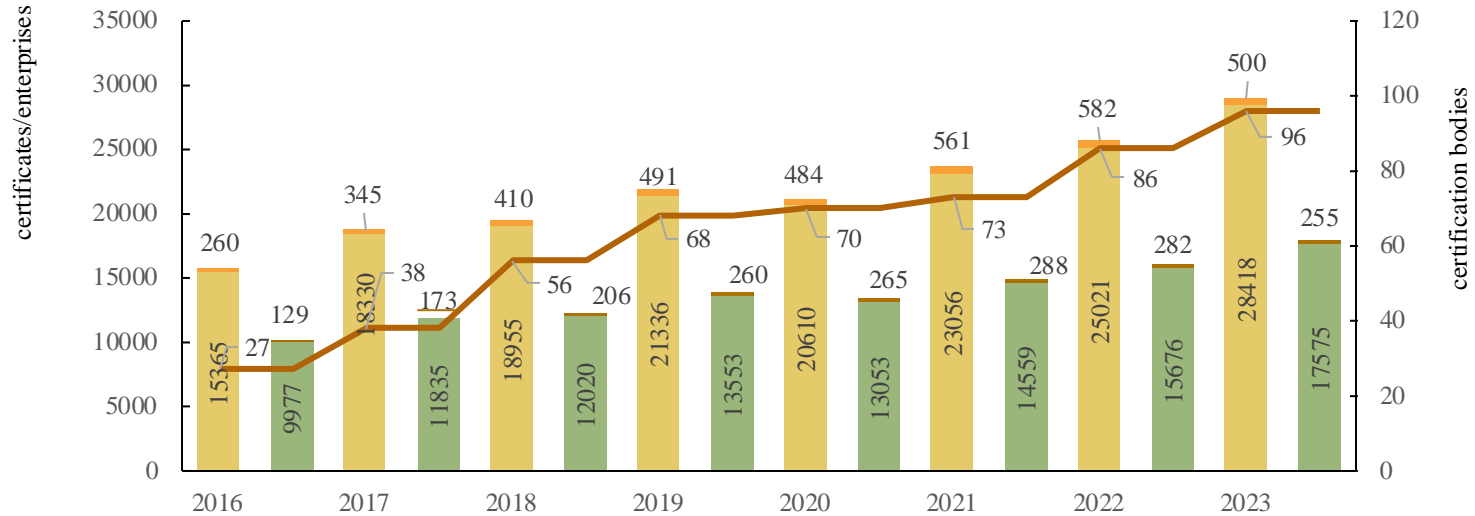
Domestic : 28,418  
Overseas : 500



Domestic : 17,575  
Overseas : 255



Domestic : 3,426 million hectares Overseas : 610 thousand hectares



Overall development trend of certification bodies, organic certificates, and certified enterprises complying with national organic standards from 2016 to 2023

## Six Major Types of Organic Certification in China in 2023

2023年六大有机产品类别中，颁发数量由多到少依次为：

In 2023, among the six categories of organic products, the issuance quantity from most to least is:

种植类 > 加工类 > 畜禽类 > 水产类 > 野生采集 > 经营类

cropping > Processing > Livestock and Poultry > Aquatic Products > Wild

Collection > Business

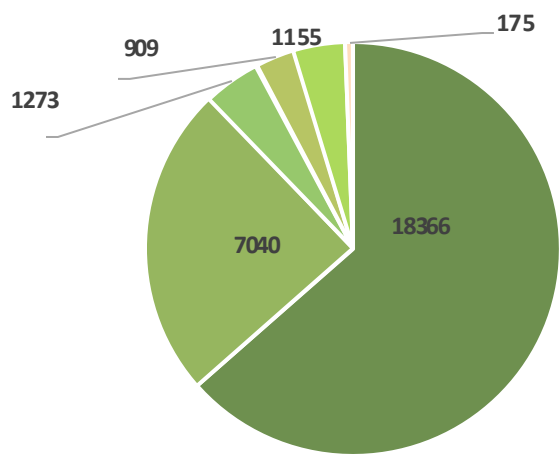


图 2023年中国有机产品证书类型  
Fig: Types of Organic Product Certificates in China in 2023

2016年-2023年中国有机产品证书类型及分布  
Types and Distribution of Organic Product Certificates in China from 2016 to 2023

	认证类型 /Types	种植 crops	加工 processing	畜禽 /livestock	水产 /Aquaculture	野采/Wild collection	经营 /Handling
2019	发证量	16665	5361	953	527	381	—
	(%)	69.8	22.4	4.0	2.2	1.6	—
2020	发证量	13750	5364	862	546	526	46
	(%)	65.2	25.4	4.1	2.6	2.5	0.2
2021	发证量	15581	5780	884	685	607	80
	(%)	66.0	24.5	3.7	2.9	2.6	0.3
2022	发证量	16649	6213	1027	760	833	121
	(%)	65.0	24.3	4.0	3.0	3.3	0.5
2023	发证量	18366	7040	1273	909	1155	175
	(%)	66.0	24.5	3.7	2.9	2.6	0.3



## Trade Status of China's Organic Industry (2023)



### Number of organic product labels issued

- ① Sterilized milk: 3.75 billion;
- ② Pasteurized milk: 0.13 billion;
- ③ Chinese liquor : 0.07 billion.



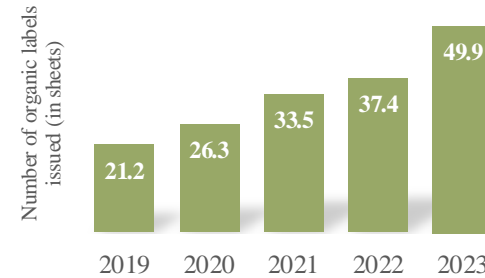
### Organic product sales volume

- ① Processed Products: 1.457 million tons;
- ② Plant Products: 1.03 million tons;
- ③ Livestock and Poultry Products: 3,000 tons.

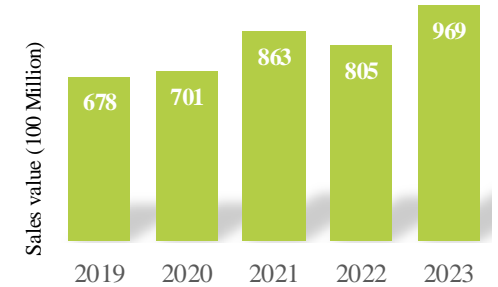


### Domestic organic product sales revenue

- ① Processed Products: 90.38 billion yuan;
- ② Plant Products: 6.16 billion yuan;
- ③ Livestock and Poultry Products: 0.17 billion yuan .



Trends in the issuance of organic labels in China from 2019 to 2023

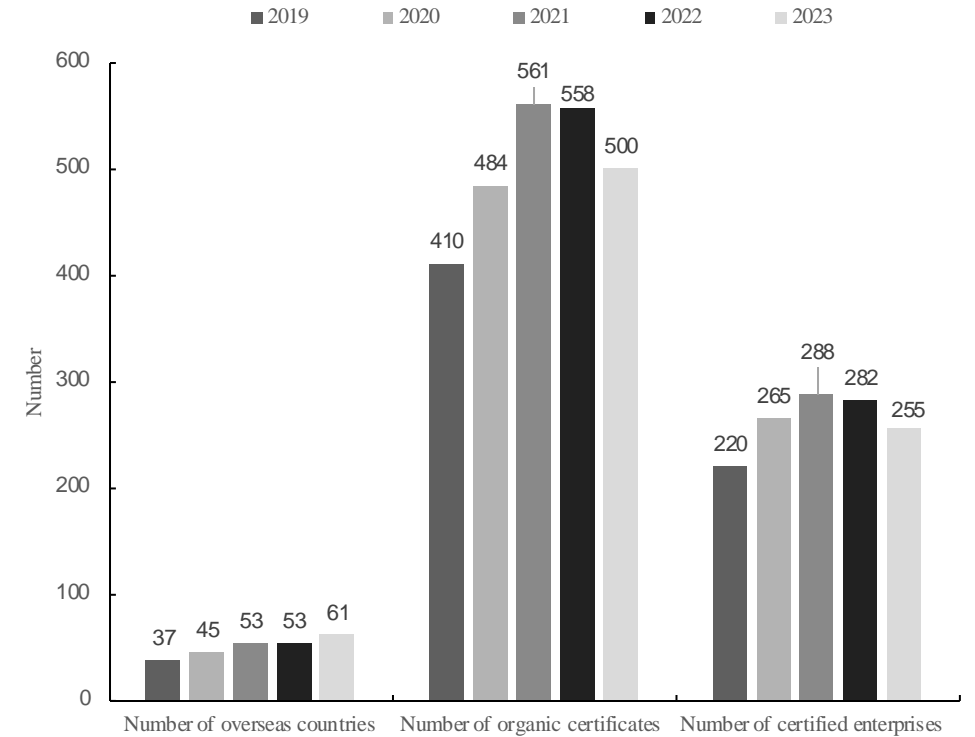


Sales revenue of organic products produced and processed within China from 2019 to 2023

- Ø Overall, the number of organic product labeling registrations in China has shown an increasing trend year by year.
- Ø In 2023, the number of organic product labels issued in China was **4.99** billion, with sterilized milk having the highest number of registered organic labels at **3.75** billion.

## Situation of Overseas Certification of Chinese Organic Standards from 2016 to 2023

In 2023, **23** certifiers issued **500** national organic certificates to **255** overseas enterprises in **61** countries and regions. The total area of overseas certification for Chinese organic product standards was **1.025** million hectares (including 302000 hectares of pasture area), with a total output of **8.203** million tons.



2016-2023年中国境外有机证书颁布数量、获证企业数量

Number of Overseas Organic Certificates Issued and Number of Certified Enterprises from 2016 to 2023



# Trade Situation of Imported Organic Products in China in 2023

2023年，进口有机产品贸易量为2.77万吨，出口贸易量为3.67万吨。

In 2023, the trade volume of imported organic products was 27,700 tons, while the exported volume was 36,700 tons.



新西兰/News land  
24.9%



爱尔兰/Ireland  
13.7%



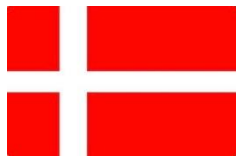
法国/France  
11.9%

2023年，进口有机产品贸易额为47.1亿元，出口贸易额为72.3亿元。

In 2023, the trade value of imported organic products was 4.71 billion RMB, while the export value was 7.23 billion RMB.



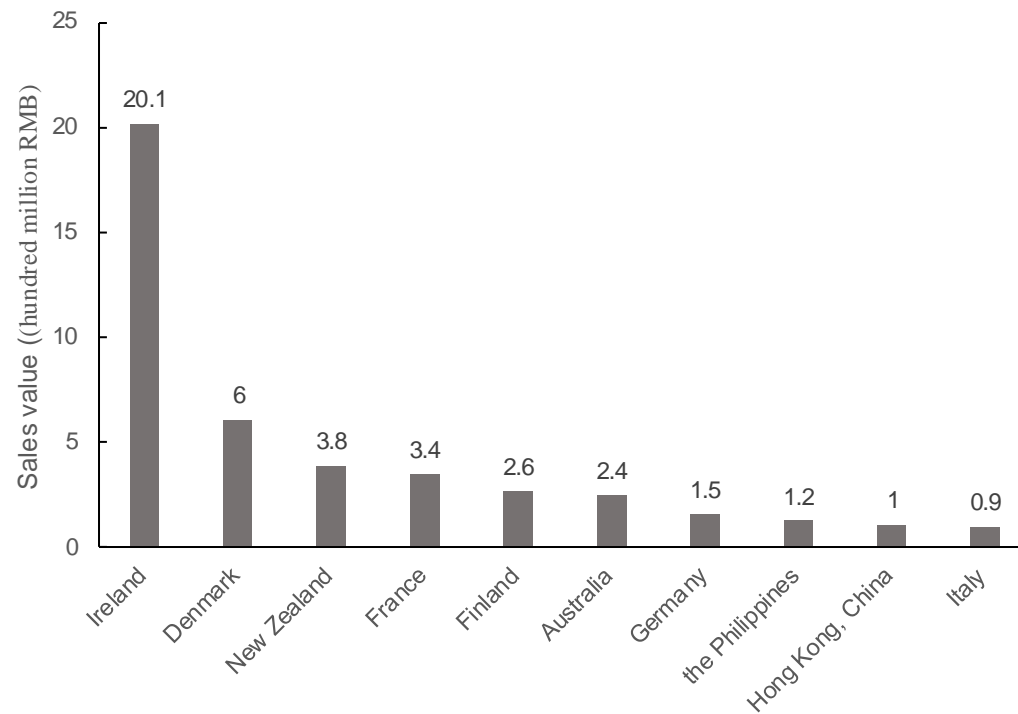
爱尔兰/Ireland  
42.7%



丹麦/Denmark  
12.7%



新西兰/News land  
8.1%



2023年境外有机产品贸易额前十位的国家和地区

Top 10 Countries and Regions by Trade Value of Overseas Organic Products in 2023

## Organic products imported from EU countries

### EU Countries

Ireland/爱尔兰  
Denmark/丹麦  
France/法国  
Finland/芬兰  
Germany/德国  
Italy/意大利  
Greece/希腊  
Spain/西班牙  
Switzerland/瑞士  
Netherlands/荷兰  
Austria/奥地利



### Import products

Dairy Products/乳制品  
Infant and Toddler Cereal-Based Complementary Foods/婴幼儿谷物辅助食品  
Plant-Based Beverages/植物饮料  
Vegetable Cans/蔬菜罐头  
Edible Vegetable Oil/食用植物油  
Wine/葡萄酒  
Butter, Jam, Noodles/黄油、果酱、挂面  
Grain Processed Products/谷物加工品  
Instant Mix Convenience Foods/冲调类方便食品

# Conclusion

## 1. 要点概述 / Summary of Key Points

### 1. 市场增长 / Market Growth

The Chinese organic market is growing rapidly, with increasing organic certificates and sales, driven by consumer demand and policy support.

### 2. 国际贸易 / International Trade

China is both an important producer and importer of organic products, and international trade is crucial for meeting the diverse needs of consumers. International trade not only meets domestic market demand but also enhances the competitiveness of Chinese organic products in the international market.

## 2. 未来展望 / Future Prospects

### 1. 市场潜力 / Market Potential

The market has significant potential for further growth. With the increasing consumer demand for organic products, the market will continue to expand into new areas and product categories.

### 2. 政策支持 / Policy Support

Government policies will continue to support organic agriculture, enhancing production and market access. These policies will further promote the development of organic agriculture and improve market competitiveness.

### 3. 消费者趋势 / Consumer Trends

Consumers' preferences for health and sustainable development will persist, and organic products will continue to meet these preferences, ensuring market relevance. The demand for organic products will continue to grow, driving market innovation and development.

# Thank you !

Zhang Youting / 张友廷

Email: [zhangyouting@oabc.cc](mailto:zhangyouting@oabc.cc)



# Global Organic Market Overview: Africa Perspective

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**David Amudavi**

Executive Director

Biovision Africa Trust, Nairobi, Kenya

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**12 February 2025, 15:00 - 16:30**

**in St. Petersburg room NCC Ost Level**



## ABOUT BIOVISION AFRICA TRUST (BvAT)

- BvAT based in Nairobi, Kenya, is a pan African organization established in 2009 with a vision for a food secure African continent with healthy people living in a healthy environment.
- Supports knowledge management, dissemination of information and knowledge and building capacity of farmers and partners to promote uptake of interventions in human, animal, plant, and environmental health.
- Based within the International Centre of Insect Physiology and Ecology (*icipe*) in Nairobi collaborating with various local, national, regional and international partners including the CGIAR centres.
- BvAT is the AU Secretariat for the AU EOA Initiative and its Secretariat.



## Africa: Organic Agriculture in Africa in 2023

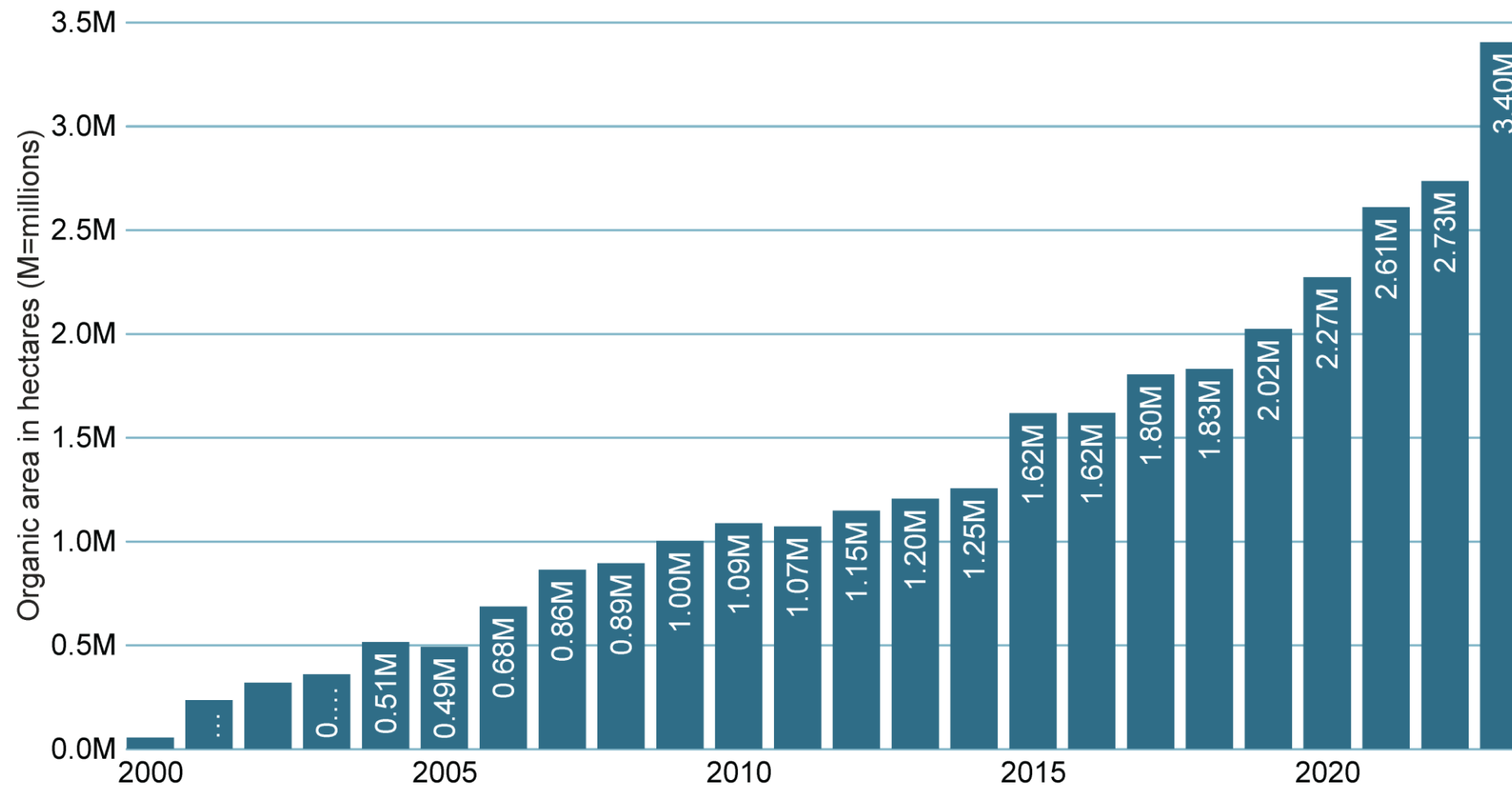
- More than **3.4 million hectares** of farmland were organic in Africa in 2023 - Over 2.8 percent of the world's organic farmland was in Africa. 30% increase compared to 2022.
- About **22.4%** the world's **organic producers** are in Africa, with **Uganda** having the largest numbers (> **404,246**). **6 of the 10 countries** with the **most organic producers** are from Africa.
- 4 countries lead with the largest organic area in hectares: **Uganda > 505,000**, followed by **Ethiopia (> 438,000)**, **Togo (> 322,000)** and **Burkina Faso (> 286,000)**.
- **Sao Tomé and Príncipe** had the highest organic area of **22.1 percent**, making it one of the world's 21 countries with an organic area share of more than 10 percent of total farmland. It was followed by **Togo (8.4)**, **Sierra Leone (5.4%)**, and **Réunion (5.0%)**.
- Most certified organic products, with **soyabean** as majority, fetch **export markets to EU and US markets**. **Togo** leads in export earning (**174.9 million tonnes**), followed by **Ghana (69.3 million tonnes)** and **Tunisia (60.0 million tonnes)**.
- Domestic markets for organic products exist but with scanty data.

(Source: FiBL survey 2025)



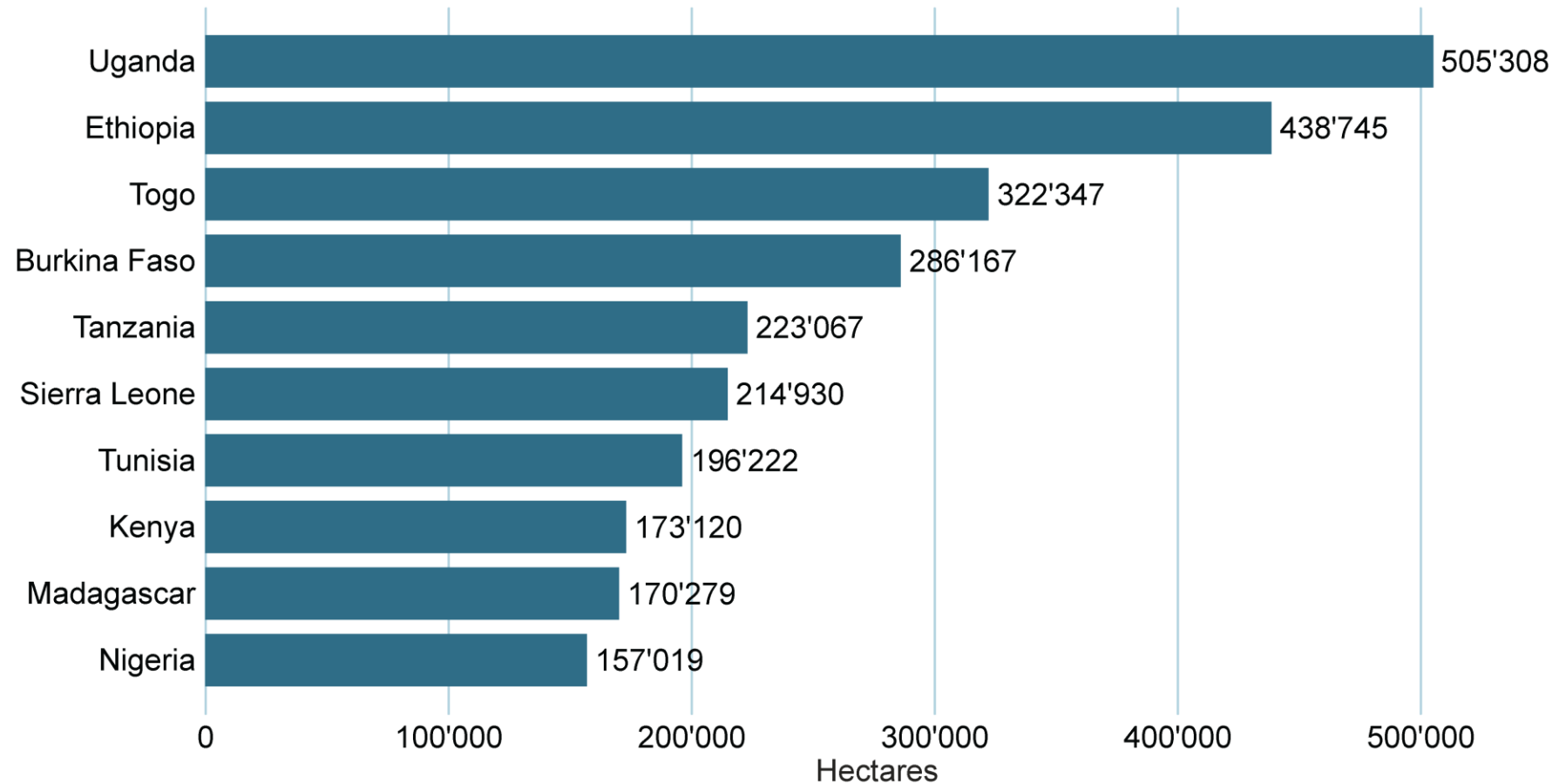
# Africa: Development of organic agricultural land 2000 - 2023

Source: FiBL-IFOAM-SOEL surveys 2001-2025



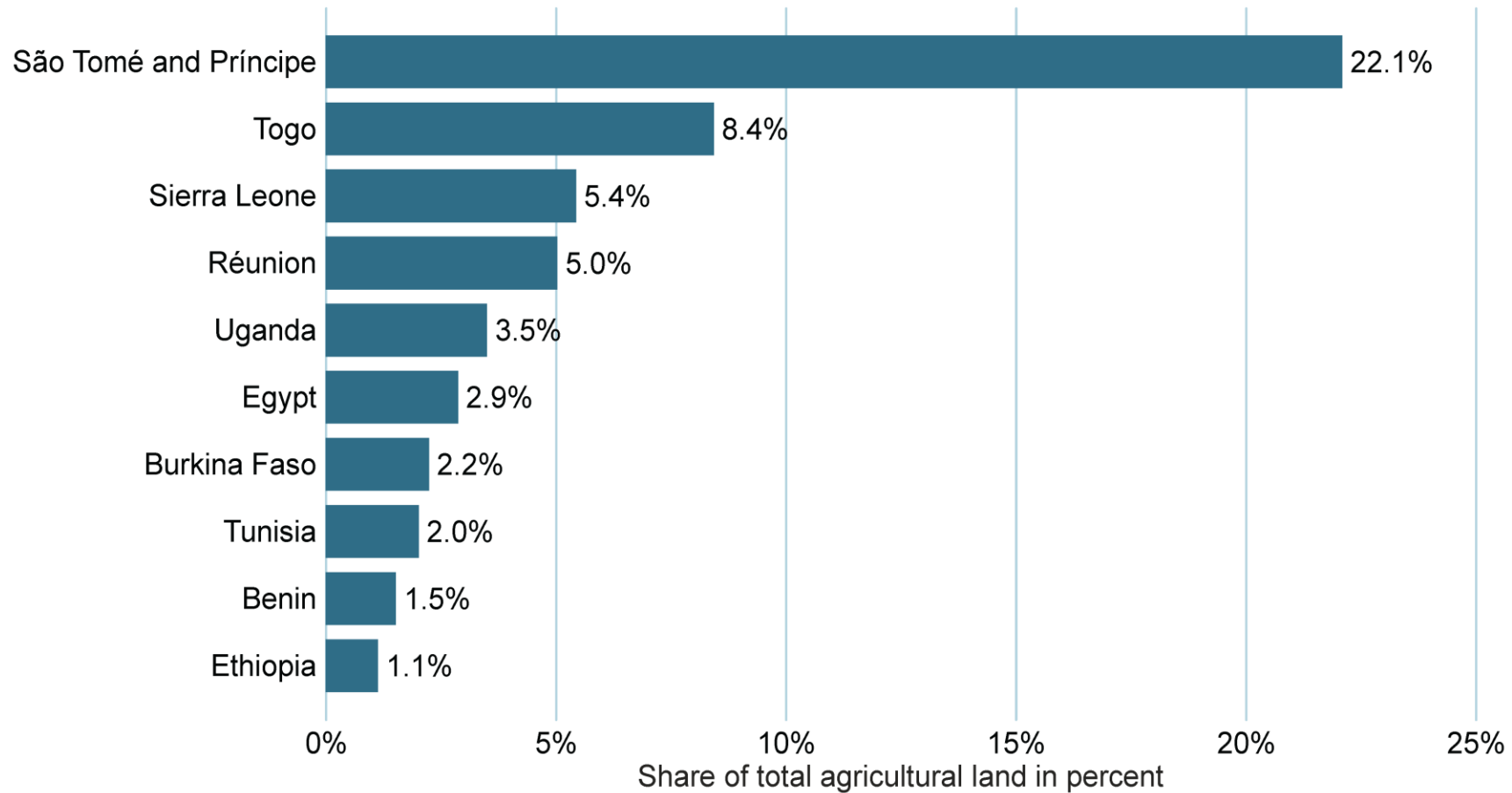
## Africa: The ten countries with the largest organic agricultural area 2023

Source: FiBL survey 2025



## Africa: The ten countries with the highest organic share of total agricultural land 2023

Source: FiBL survey 2025



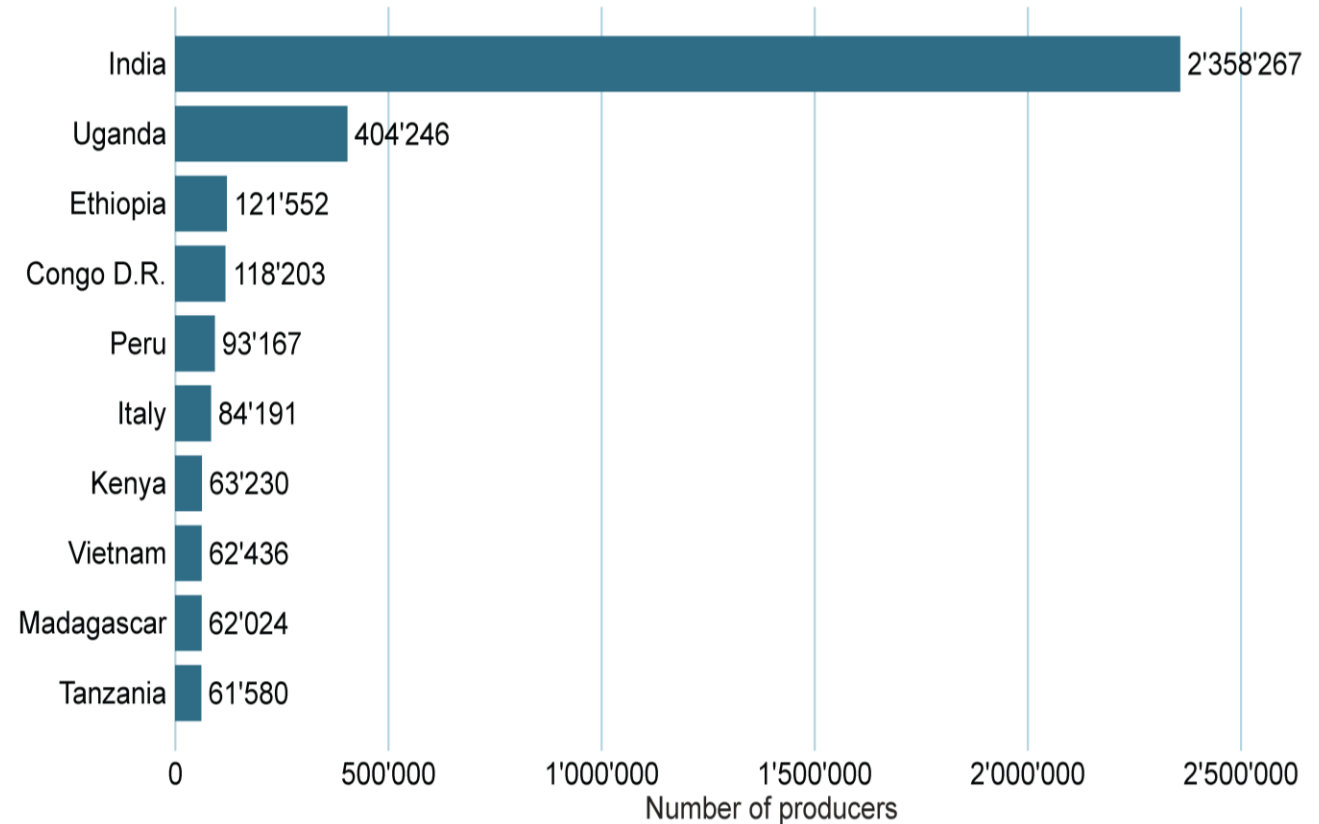
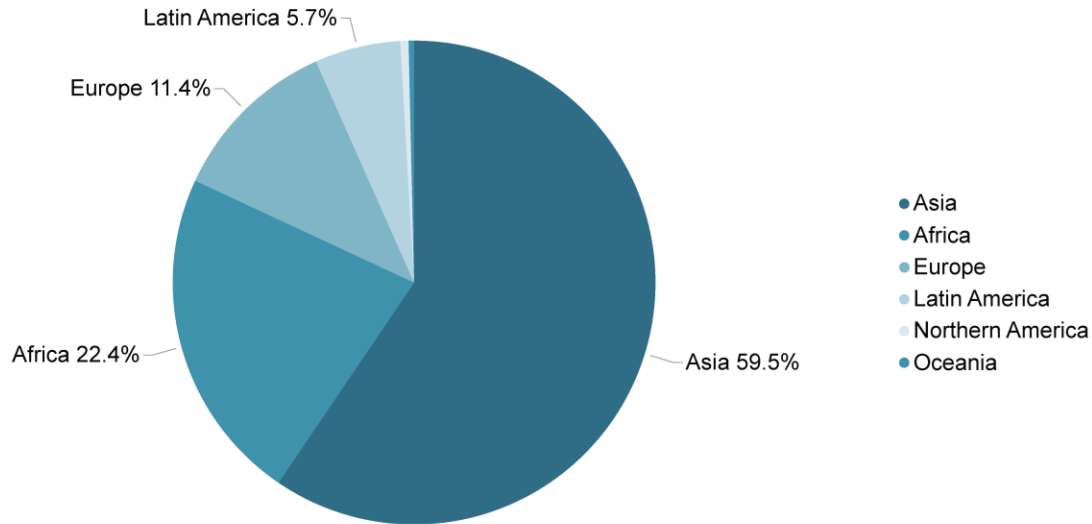
# Distribution of Organic Producers 2023

## World: The ten countries with the most organic producers 2023

Source: FiBL survey 2025

## World: Distribution of organic producers by region 2023

Source: FiBL survey 2025

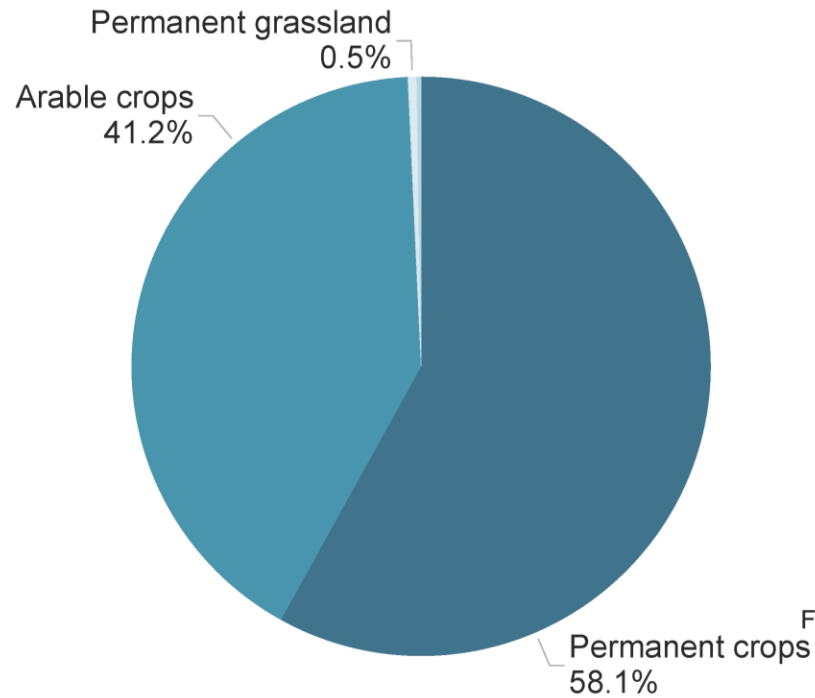


# Use of Organic Agricultural Land in 2023

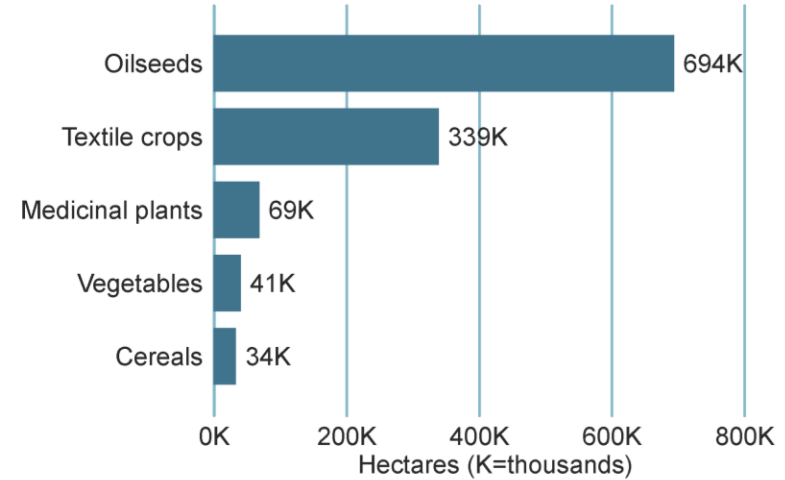
## Africa: Use of organic agricultural land 2023

Source: FiBL survey 2025

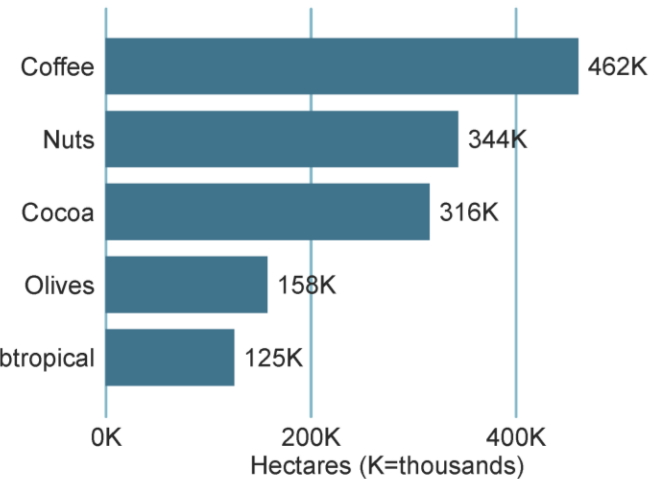
### Land use types



### Key arable crops

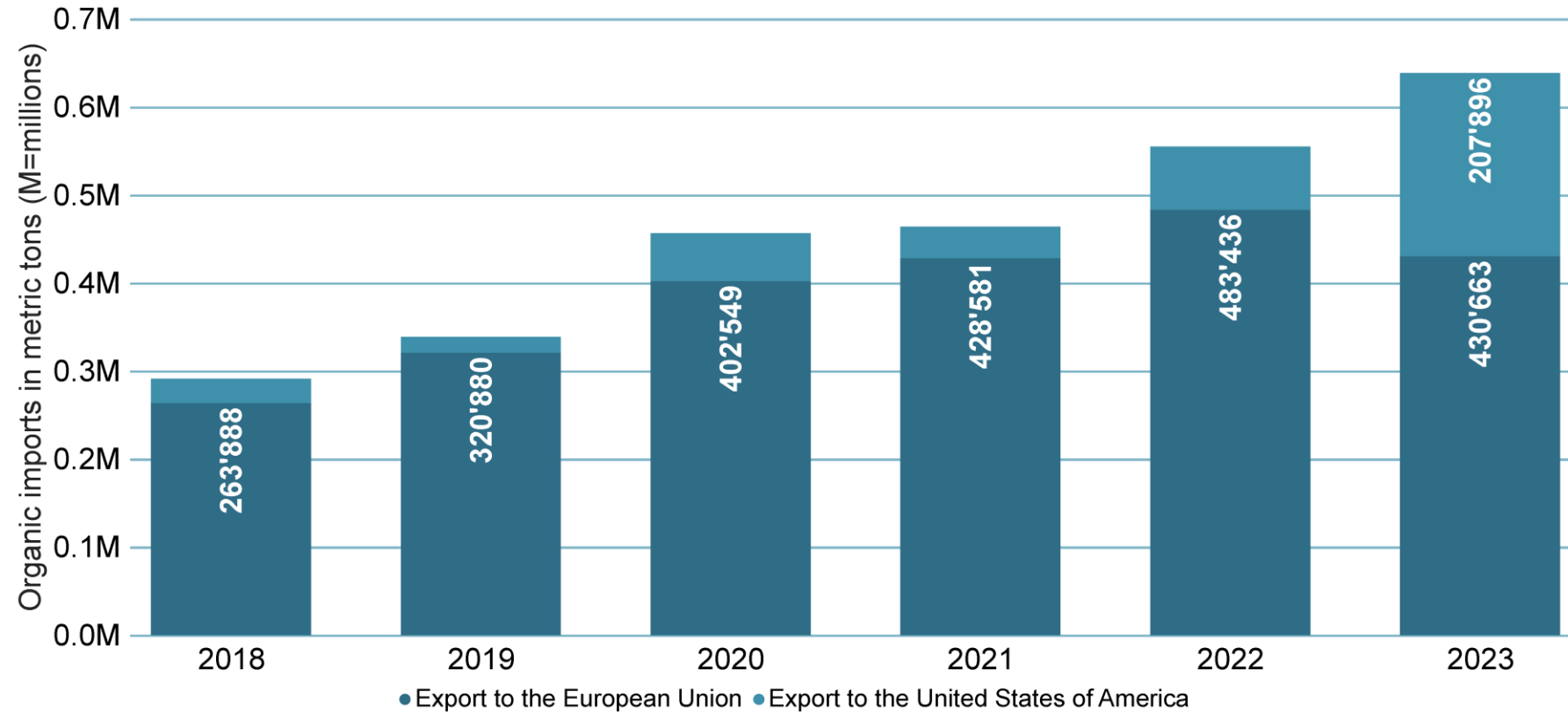


### Key permanent crops



# Africa: Development of organic export to EU and US 2018-2023

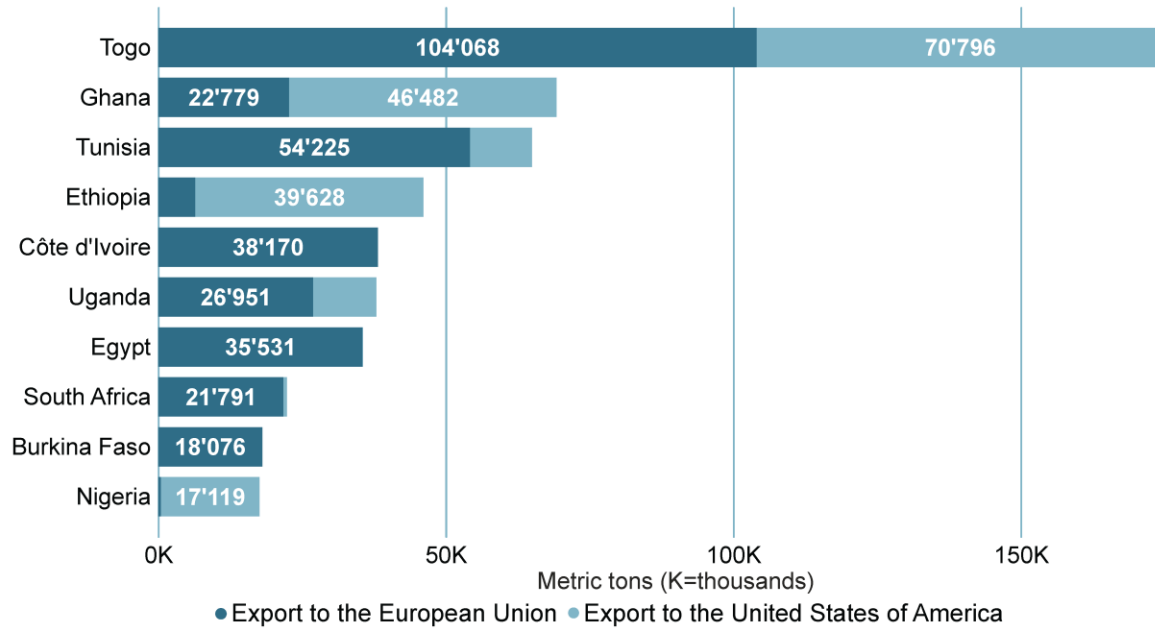
Sources: Traces/European Commission and GATS/USDA



# Organic Exports to EU and US Markets in 2023

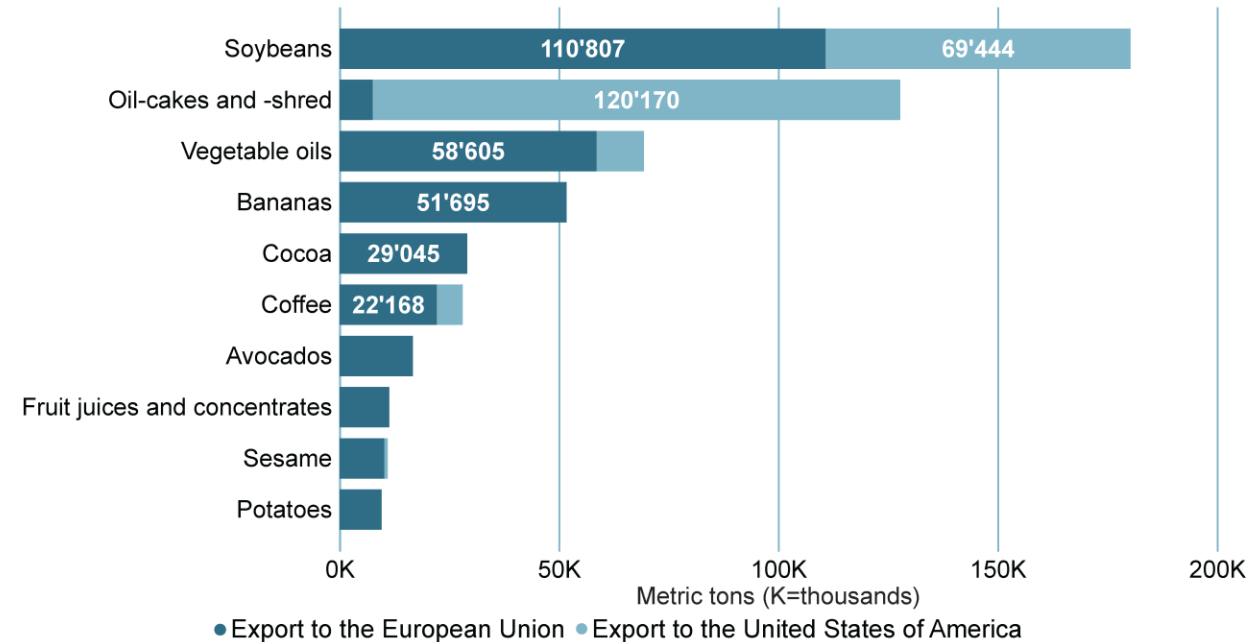
## Africa: Key EU and US export countries in 2023

Source: Traces/European Commission and GATS/USDA



## Africa: Key commodities exported to the EU and US in 2023

Source: Traces/European Commission and GATS/USDA





# Opportunities for Organic Agriculture Growth

- **Comprehensive Africa Agriculture Development Programme (CAADP) Strategy and Action Plan: 2026-2035 (Building Resilient Agri-Food Systems in Africa): Sustainable Food Production:** Strengthen the adoption of sustainable agricultural practices e.g. Conservation agriculture, agroecological practices, etc.
- **CAADP indicators of key parameters of organic agriculture** integrated into the reporting processes (Biennial Review Process).
  - Organic fertilizer use.
  - Agriculture area under organic/Ecological organic agriculture practices.
  - Seed performance index and status of farmer managed seed systems in national seed policy instruments and institutional arrangements.
- **Growing awareness and demand for organic products sustainably produced -** Growing awareness among consumers about the health benefits of organic products, environmental concerns, and the desire for foods that are free from synthetic pesticides and fertilizers – Going beyond niche markets.



# Multistakeholder Forums for Boosting the Organic Sector

 Ministry of Agriculture &  
Livestock Development



## 2ND EASTERN AFRICA AGROECOLOGY CONFERENCE

#EAAC2025

### Call for Registrations

 Argyle Grand Hotel

 25-28 March 2025

**REGISTER NOW!**

<https://ea-agroecologyconference.org/>

[info@ea-agroecologyconference.org](mailto:info@ea-agroecologyconference.org)

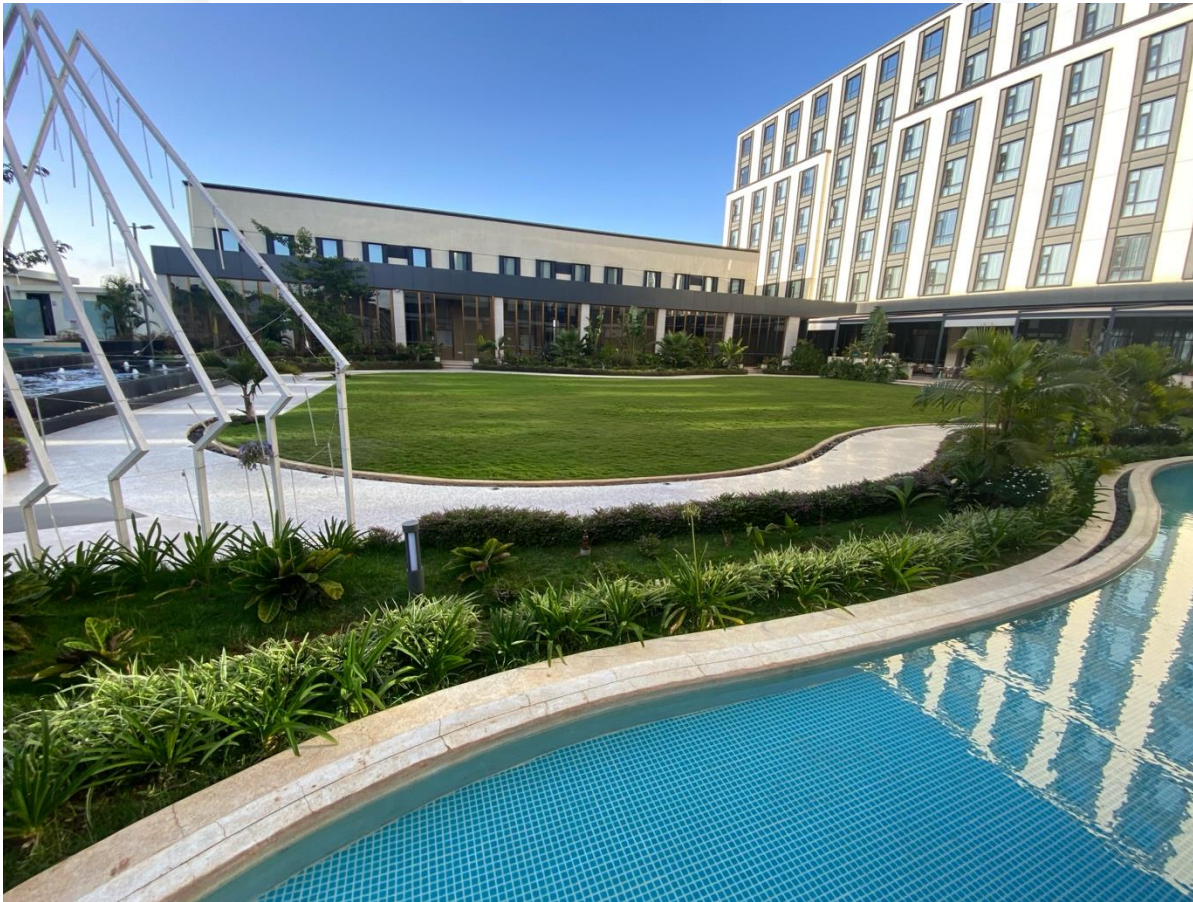


2023 The 1<sup>st</sup> Eastern Africa Agroecology Conference





# Venue for the 2<sup>nd</sup> EAAC, Argyle Grant Hotel, Nairobi, Kenya



**Join us on 25-28 March 2025!** [2nd ea-agroecologyconference](#)



# Thank you!



**Visit our booth**  
**Hall 1 - 351**