



Wed

Feb 15

14:30–16:00

Global Organic Market Overview

BIOFACH2023
into organic

 **St. Petersburg**
(NCC Ost)

Our Panel

Moderation



Marco Schlüter

Interim Executive Director
IFOAM – Organics International

Speakers



Helga Willer

Leader of the Group Project communication
FiBL - Research Institute Organic Agriculture



Tia Loftsgard

Executive Director
Canada Organic Trade Association

Karen Mapusua

President
IFOAM - Organics International



Julia Lernoud

Vice President
IFOAM - Organics International

Miyoshi Satoko

World Board Member
IFOAM - Organics International



David Amudavi

Executive Director
Biovision Africa Trust (via Zoom)



Organic Agriculture Worldwide 2021

Organic Farmland



76.4M ha Organic farmland in million (M) hectares (ha)

1.7% Growth 2020/2021

191 Countries with organic farming

Organic Producers

The number of organic producers is increasing

3.7M Organic farmers (million)

The increase of organic producers

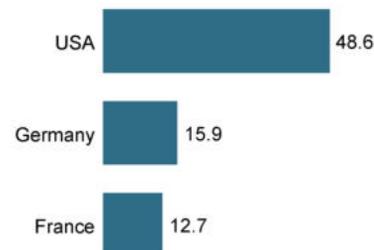
4.9% From 2020

Organic Market

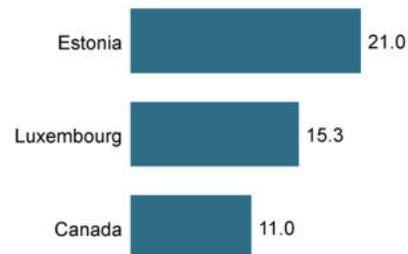
The global market is growing and consumer demand is increasing

Over 124.8 Global organic food market in billion euros

Market in billion euros Top 3 countries



Market growth in percent Top 3 countries

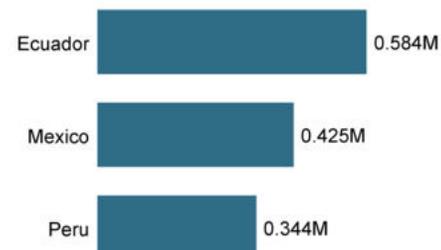


Imports/Exports

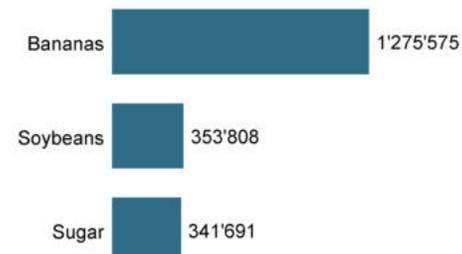
Organic imports into the European Union (EU) and the United States* (US)

4.7M Total organic imports to the EU and US* in million metric tons (MT)

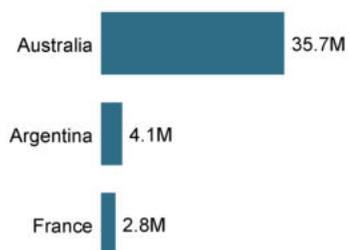
Imports to the EU and US* in million MT. Top 3 countries



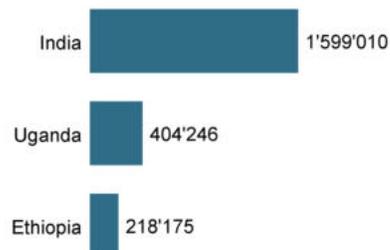
Imports to the EU and US in metric tons. Top 3 commodities



Farmland in million (M) hectares Top 3 countries



Number of producers Top 3 countries



WORLD: ORGANIC FARMLAND 2021

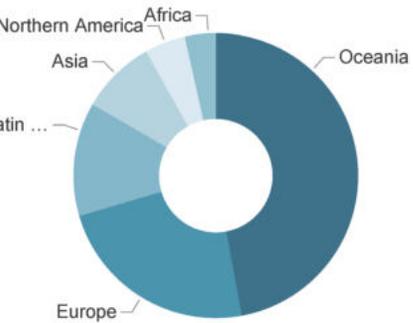
World
76.4M
hectares

Australia
35.7M
hectares

1.6%
of the world's
farmland is
organic

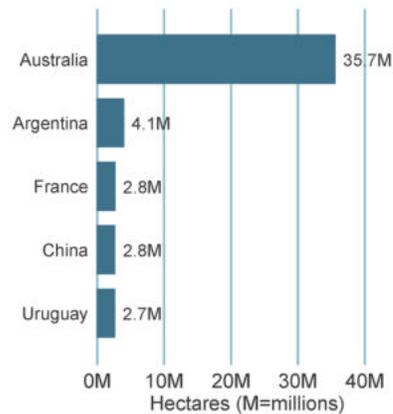
1.7%
growth
since 2020

In Oceania there were 36.0 million (M) hectares (ha), in Europe 17.8 million ha and in Latin America 9.9 million ha.



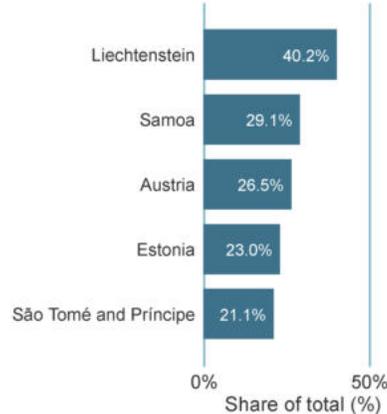
Distribution of organic agricultural land by region 2021.

The ten countries with the largest organic agricultural areas represented 78 % of the world's organic agricultural land.



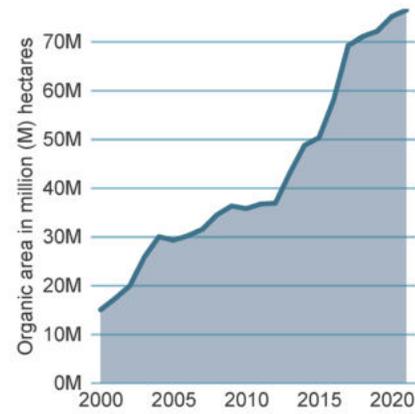
The five countries with the largest areas of organic agricultural land 2021.

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



Top 5 countries with more than 10% of organic agricultural land 2021.

In 2021, 1.3 million hectares more were reported compared with 2020.

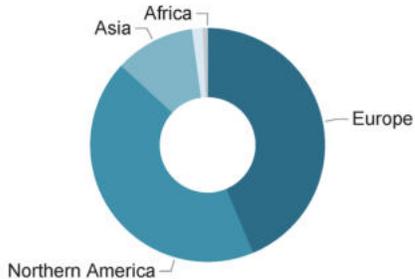


Growth of the organic agricultural land 2000-2021.

WORLD: ORGANIC RETAIL SALES 2021

World almost
125bn €

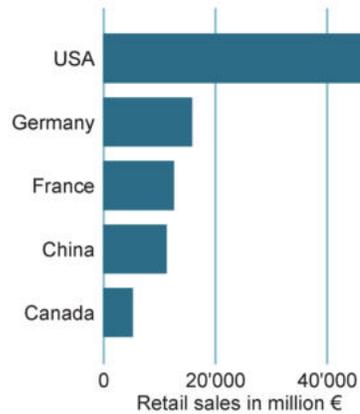
The largest single market was the USA with 48.6 billion (bn) €, followed by the European Union (46.7 bn €). By region, Europe had the lead (54.5 bn €), followed by Northern America (53.9 bn €) and Asia (13.7 bn €).



Distribution of retail sales by region 2021.

Europe
54.5bn€

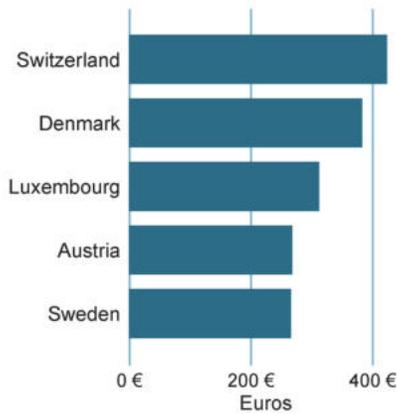
The countries with the largest markets for organic food were the USA with 48.6 billion (bn) €, Germany (15.9 bn €), France (12.7 bn €) and China (11.3 bn €).



The five countries with the largest markets for organic food in 2021.

425 €
spent per person in Switzerland

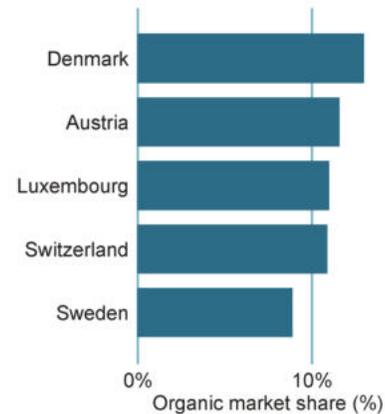
Switzerland had the highest per capita consumption worldwide, followed by Denmark, Luxembourg, Austria and Sweden.



Top five countries with the highest per capita consumption 2021.

13.0%
of the market in Denmark was organic

The highest organic share of the total market was in Denmark, followed by Austria, Luxembourg, Switzerland, and Sweden.



The five countries with the highest organic shares of the total market in 2021.



Research Institute of Organic Agriculture FiBL
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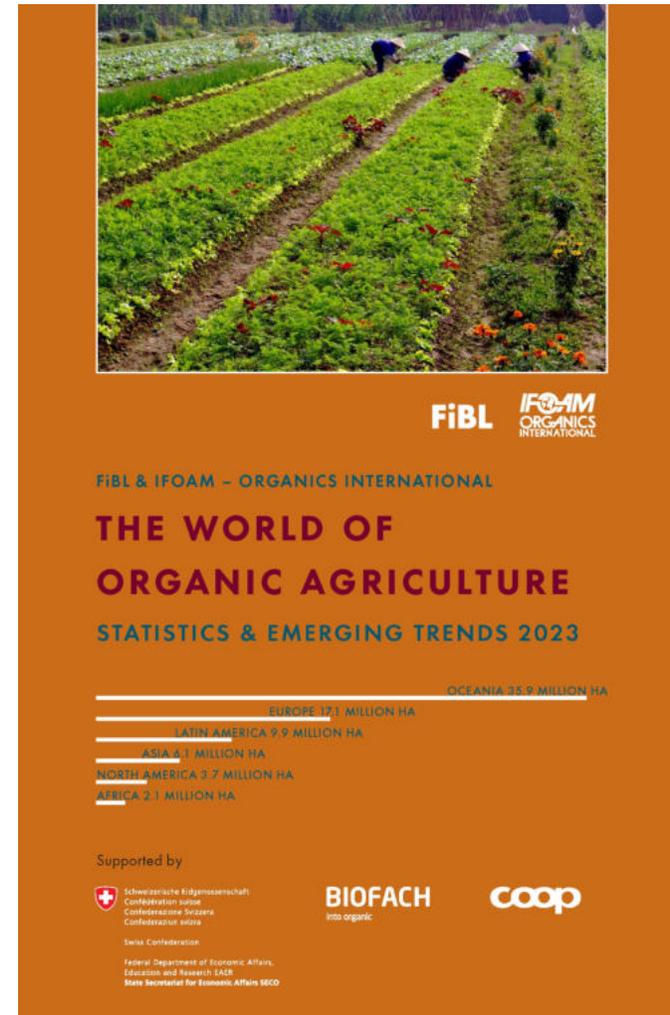
Recent European market trends

Helga Willer, Jan Travnicek and Bernhard Schlatter, FiBL

February 15, 2022 – BIOFACH

The World of Organic Agriculture 2023

- › The 24th edition of «The World of Organic Agriculture», was published by FiBL and IFOAM – Organics International in February 2023.
- › Data tables
- › Country and continent reports
- › Markets, standards, policy support
- › The book can be ordered or downloaded at (item number 1254):
<https://www.fibl.org/en/shop-en>
- › www.organic-world.net
- › <https://statistics.fibl.org>



FiBL **IFOAM ORGANICS INTERNATIONAL**

FIBL & IFOAM – ORGANICS INTERNATIONAL

THE WORLD OF ORGANIC AGRICULTURE
STATISTICS & EMERGING TRENDS 2023

OCEANIA 35.9 MILLION HA
EUROPE 17.1 MILLION HA
LATIN AMERICA 9.9 MILLION HA
ASIA 4.1 MILLION HA
NORTH AMERICA 3.7 MILLION HA
AFRICA 2.1 MILLION HA

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Education and Research EAER
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BIOFACH
into organic

coop

Content

1. Latest data

- a. Area
- b. Retail sales
- c. Imports

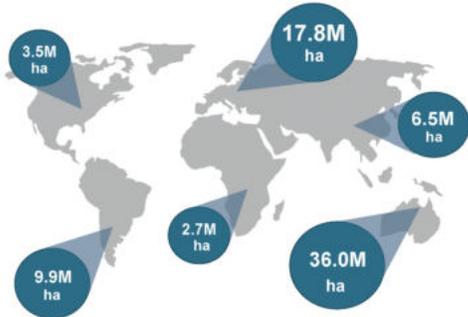
2. Current Trends

- a. Post pandemic
- b. War in Ukraine

3. Outlook

Organic Agriculture Worldwide 2021

Organic Farmland



76.4M ha

Organic farmland in million (M) hectares (ha)

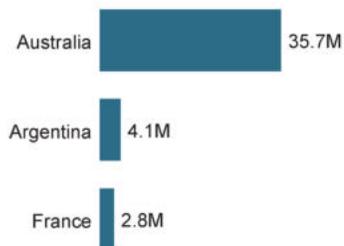
1.7%

Growth 2020/2021

191

Countries with organic farming

Farmland in million (M) hectares
Top 3 countries



Organic Producers

The number of organic producers is increasing

3.7M

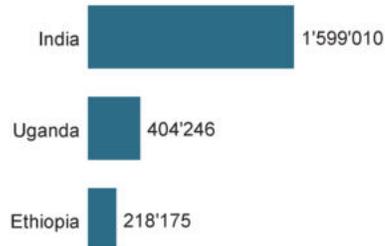
Organic farmers (million)

The increase of organic producers

4.9%

From 2020

Number of producers
Top 3 countries



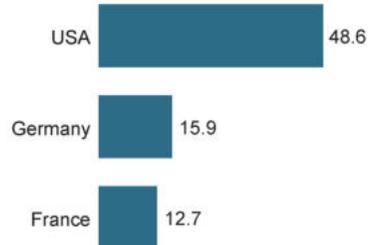
Organic Market

The global market is growing and consumer demand is increasing

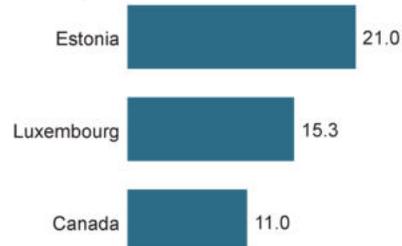
Over 124.8

Global organic food market in billion euros

Market in billion euros
Top 3 countries



Market growth in percent
Top 3 countries



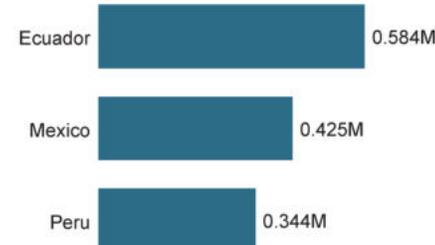
Imports/Exports

Organic imports into the European Union (EU) and the United States* (US)

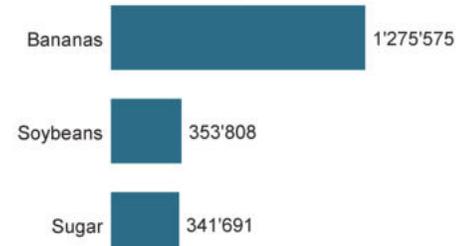
4.7M

Total organic imports to the EU and US* in million metric tons (MT)

Imports to the EU and US* in million MT. Top 3 countries

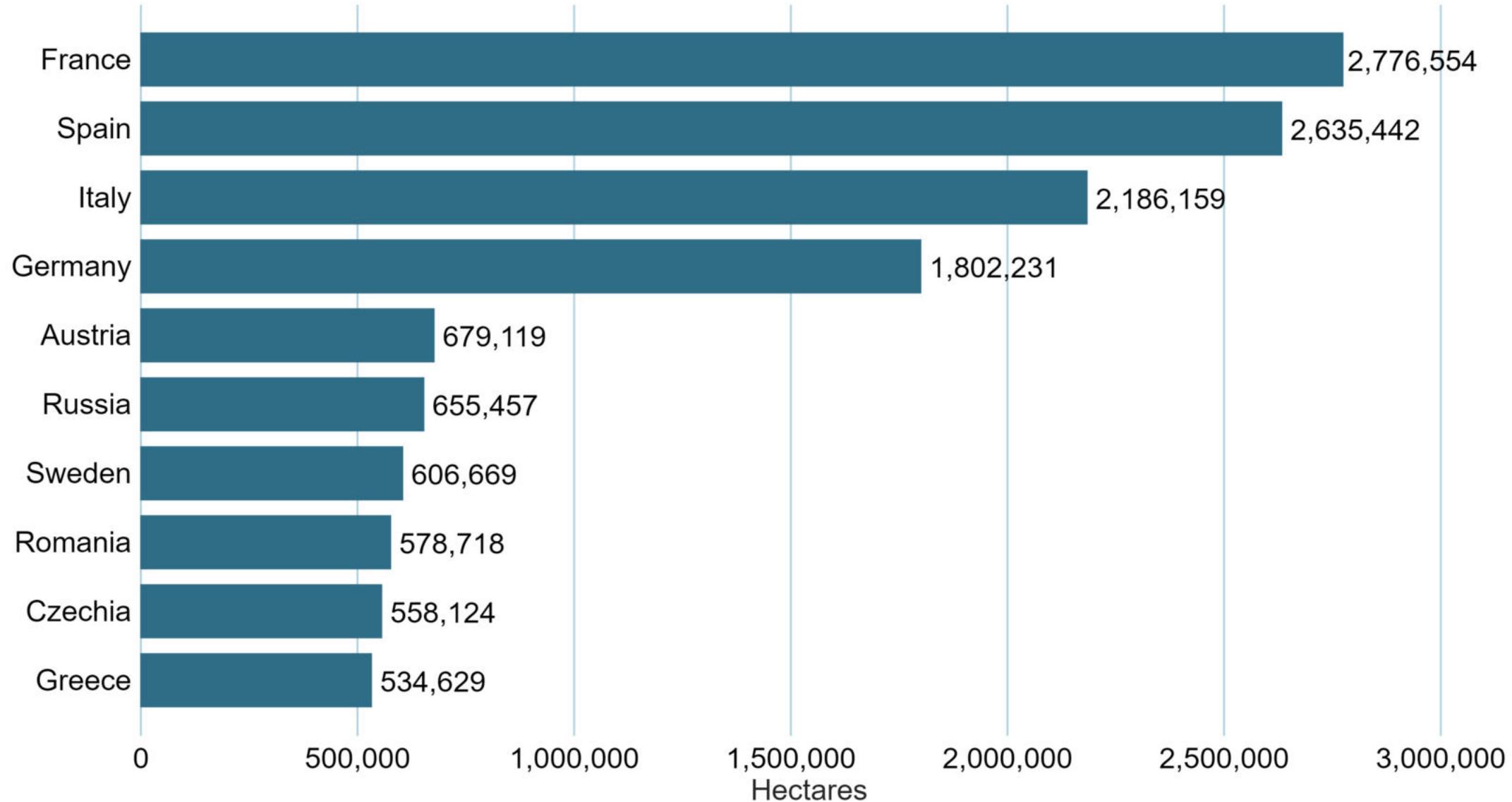


Imports to the EU and US in metric tons. Top 3 commodities



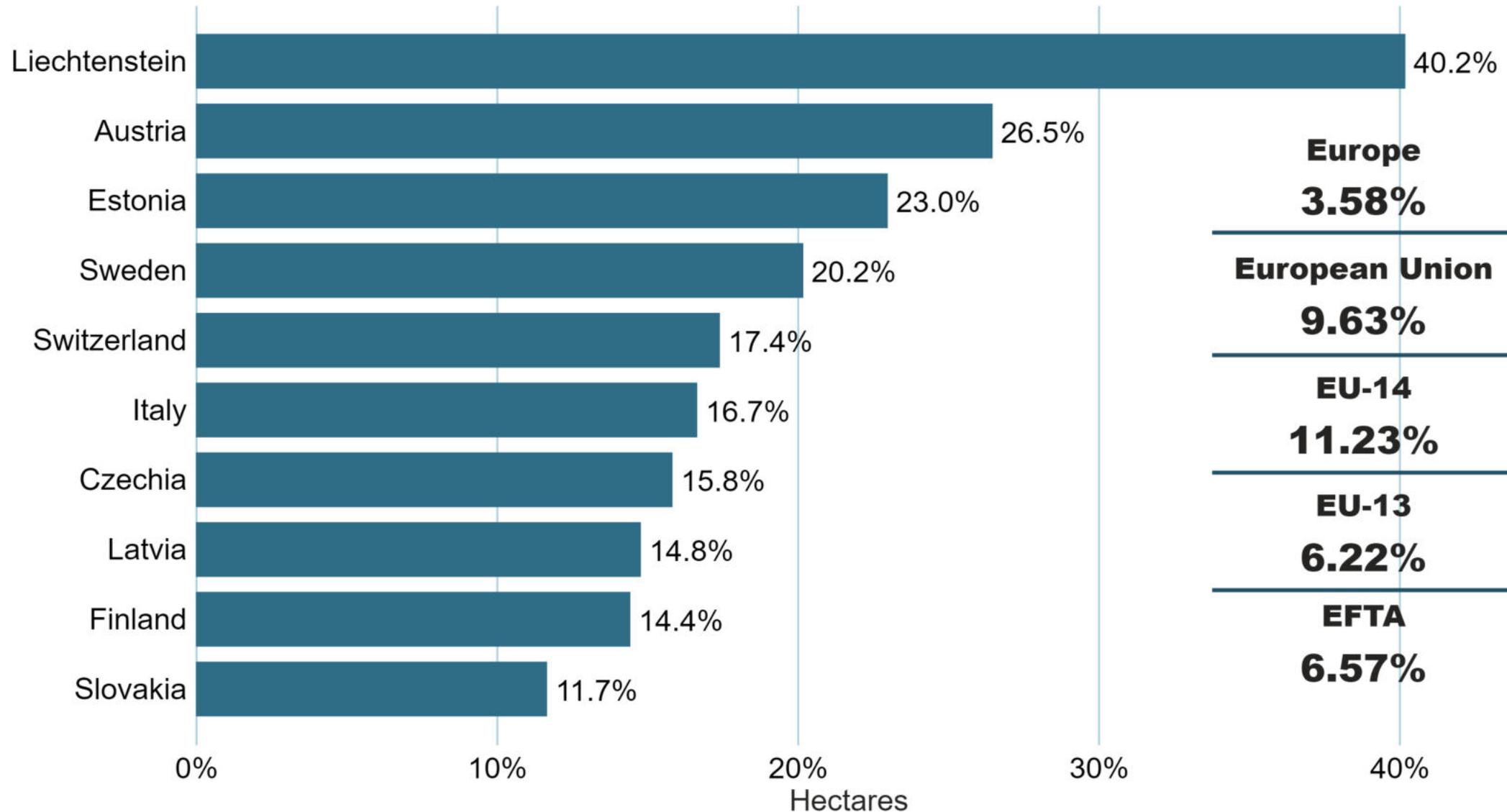
Europe: Organic agricultural land by country 2021

Source: FiBL-AMI survey 2023



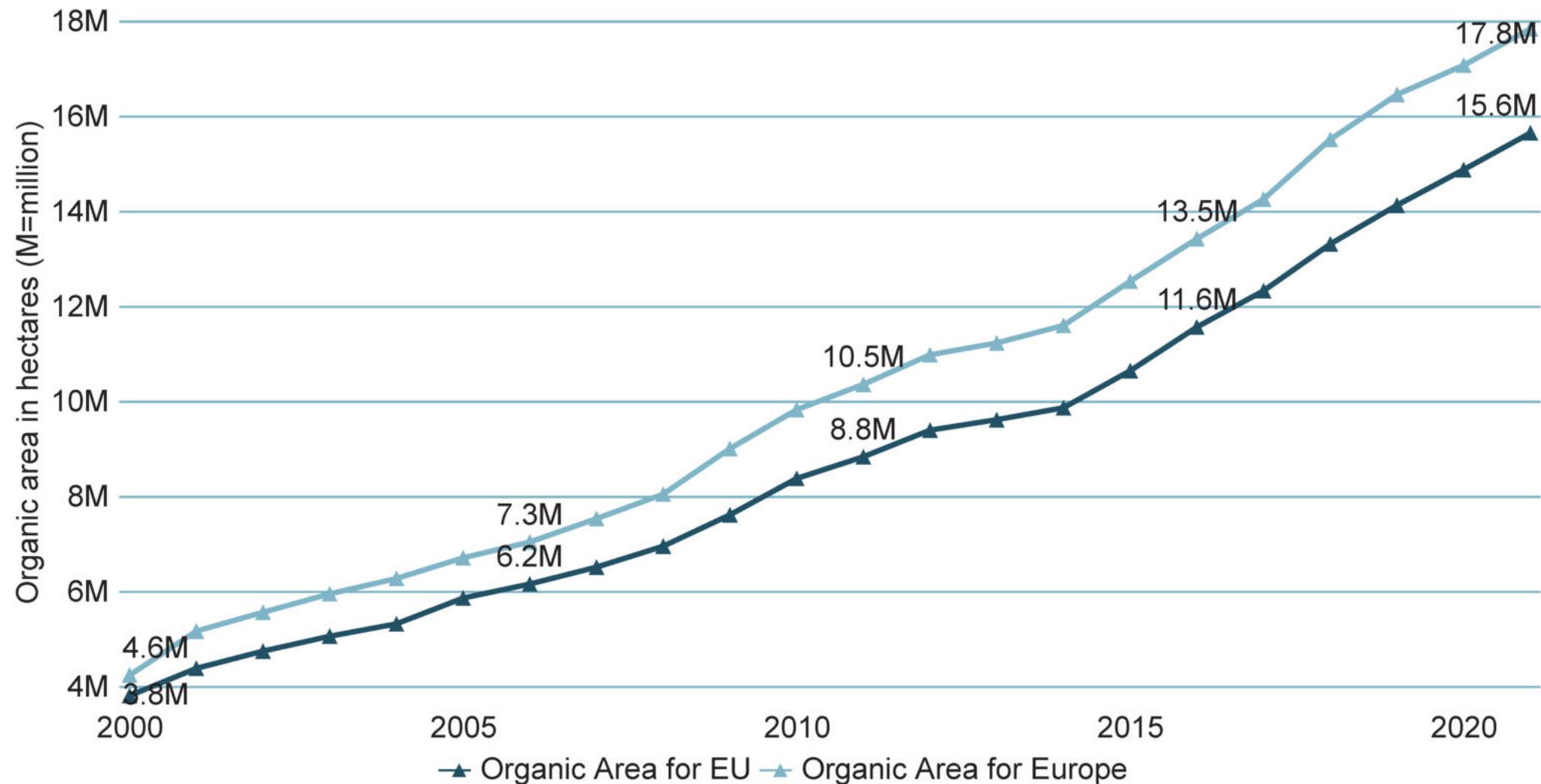
Europe: Organic shares of total agricultural land 2021

Source: FiBL-AMI survey 2023



Europe and the European Union: Development of organic agricultural land 2000 - 2021

Source: FiBL-AMI surveys 2001-2023, based on the national data sources and Eurostat

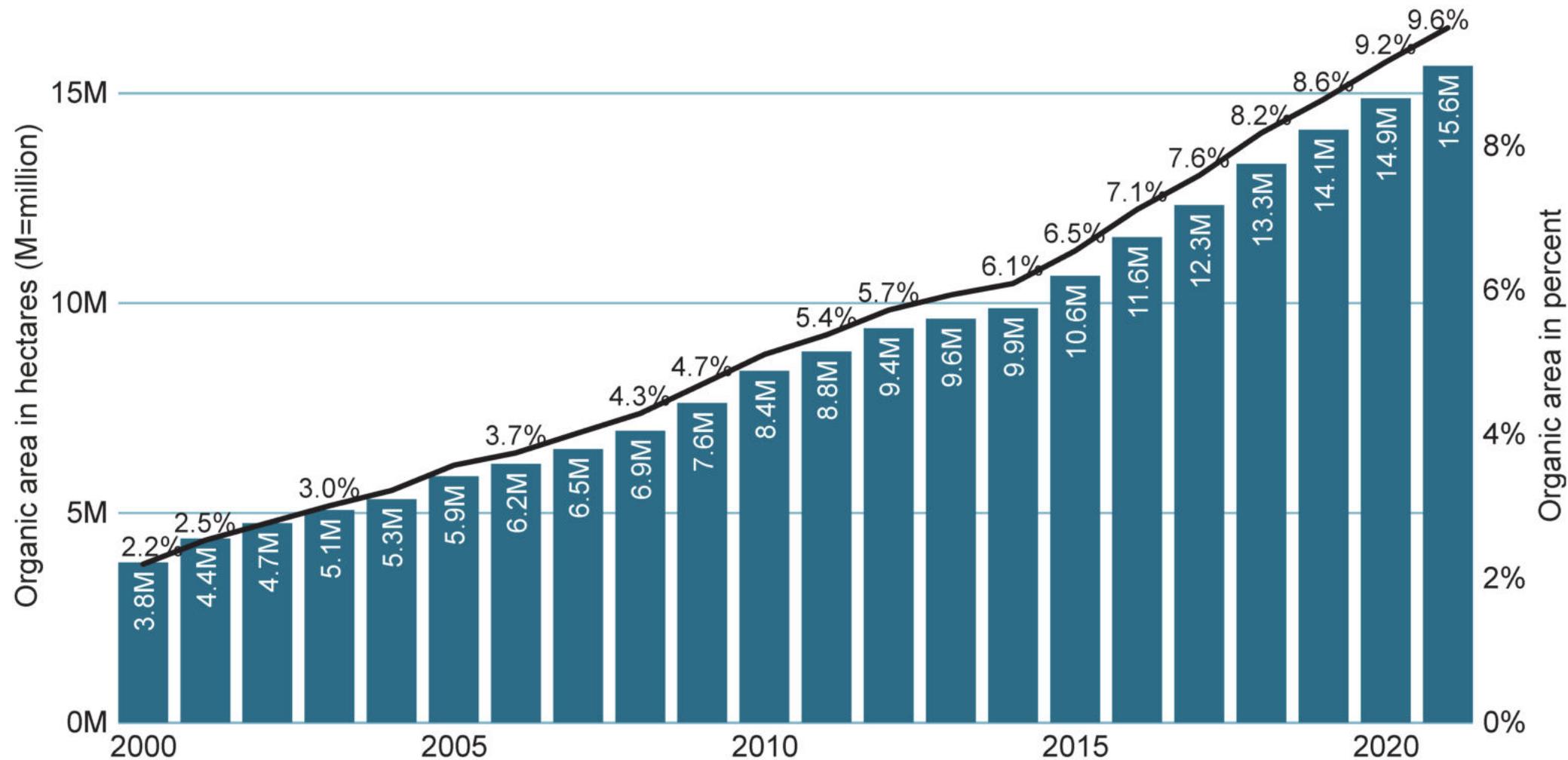


Reaching an organic share of 25% of total farmland in the EU

- Farm-to-Fork-Strategy
- “Organic farming is an environmentally-friendly practice that needs to be further developed. The Commission will boost the development of EU organic farming area with the aim to achieve 25% of total farmland under organic farming by 2030.” (European Commission)
- Instruments:
 - Organic Action Plan (23 actions, including more research)
 - National Strategic Plans as(SPs) part of the Common Agricultural Policy (CAP)
CAP National Strategic Plans should develop and support organic farming. A detailed analysis of the CAP SPs 2023–2027 and how they support organic agriculture will be published in spring 2023 as part of OrganicTargets4EU’s project.

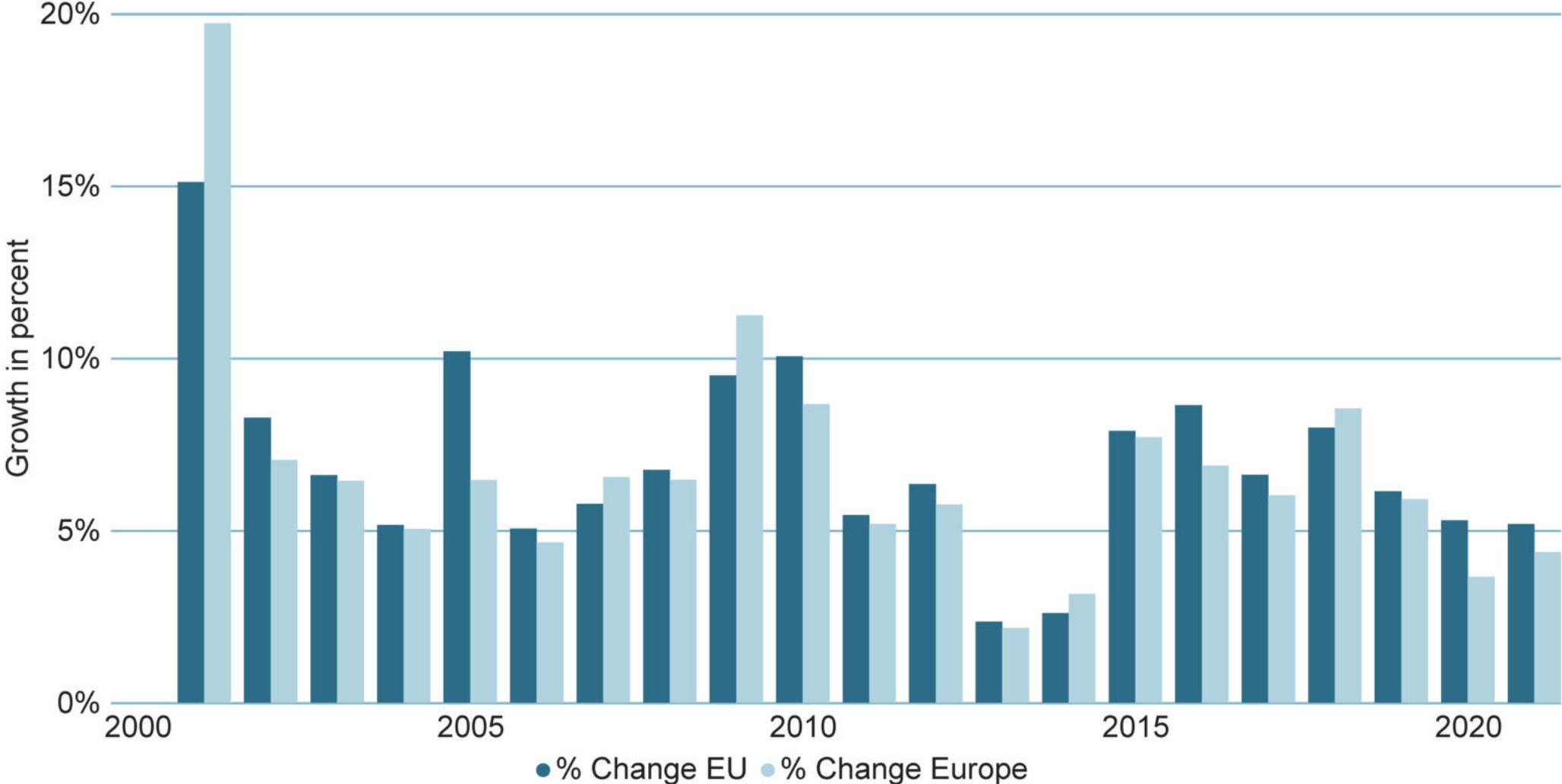
EU: Growth of organic agricultural land and organic share 2000 - 2021

Source: FiBL-IFOAM-SOEL surveys 2001-2023



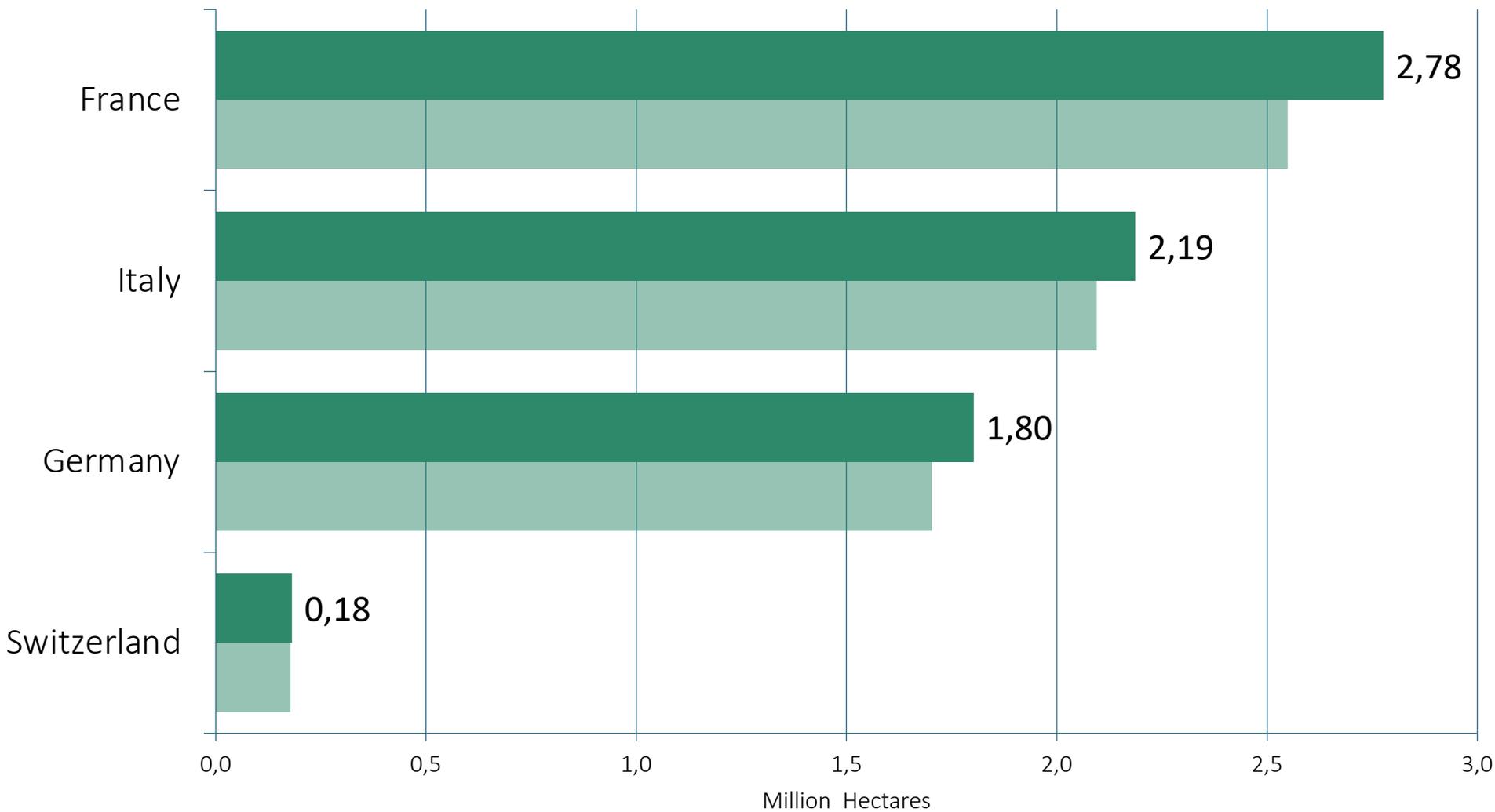
Europe: Growth rates for organic agricultural land in Europe and the European Union 2000 - 2021

Source: FiBL-AMI surveys 2001-2023, based on national data sources and Eurostat



Organic farmland area 2020 and 2021

Source FiBL survey

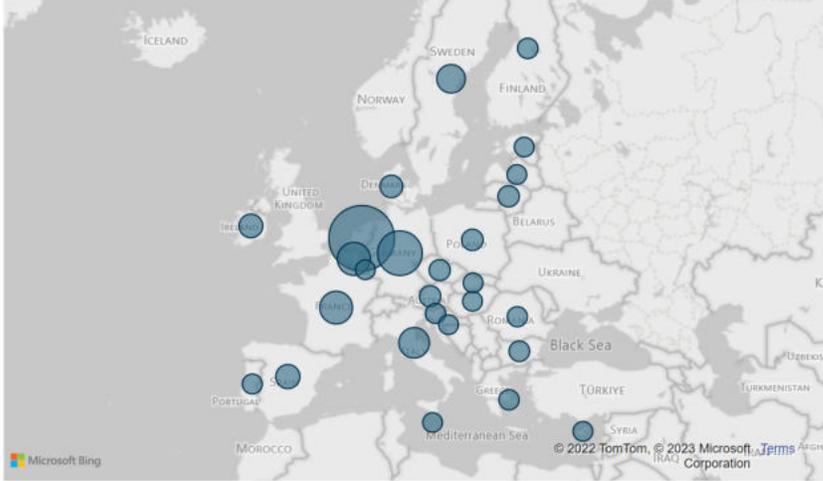


Area growth for select countries

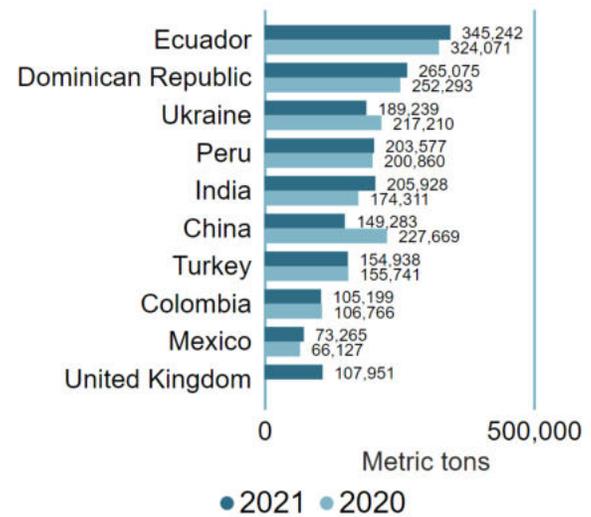
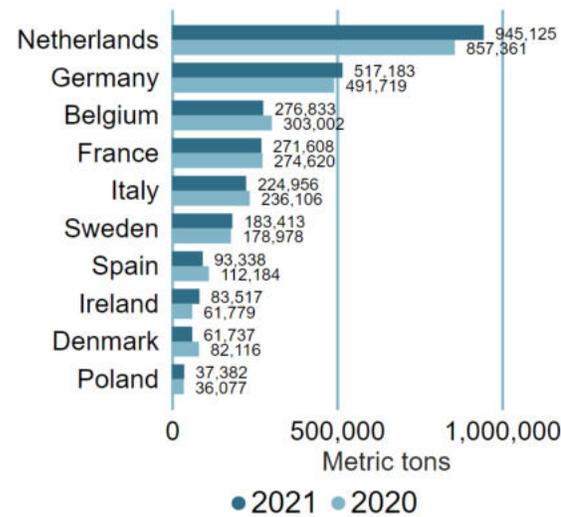
European Union: Organic agri-food import to the European Union 2021

Source: Traces/European Commission 2022

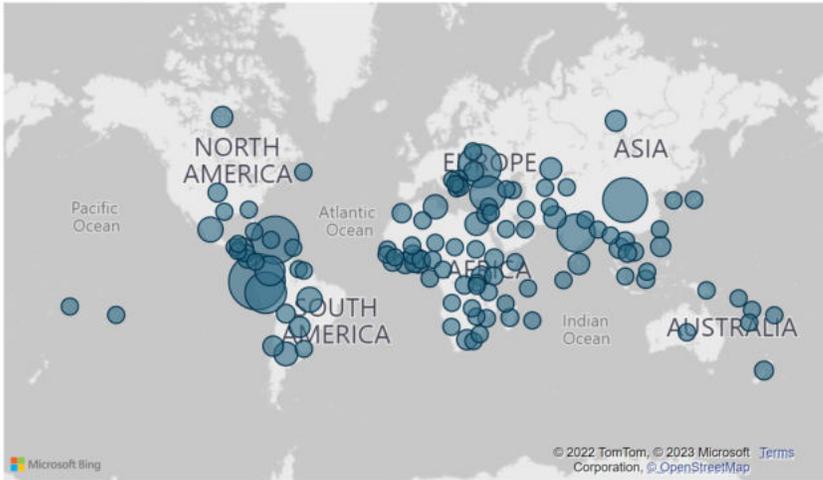
Importing countries (imports in metric tons)



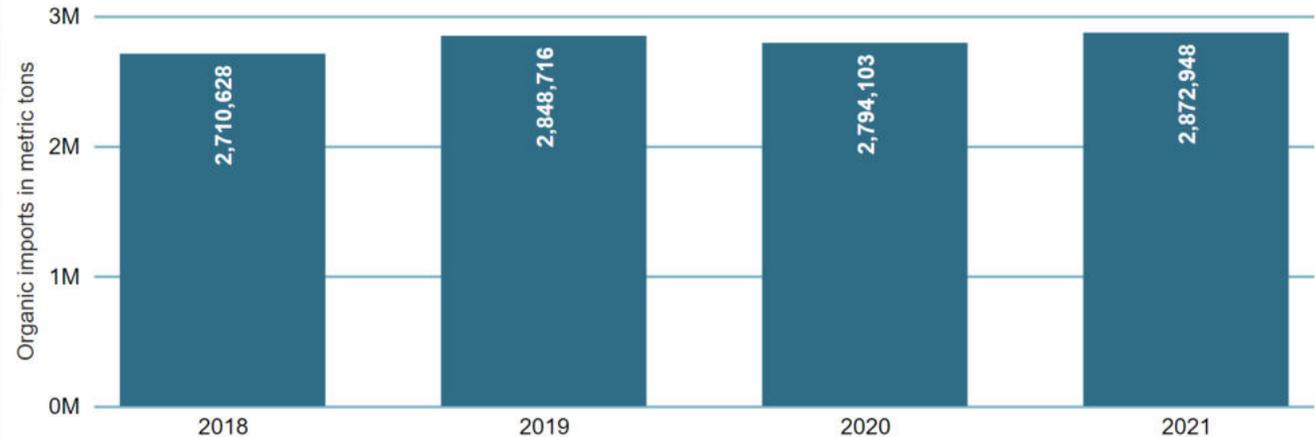
Importing countries (imports in metric tons) Exporting countries (exports in metric tons)



Exporting countries (exports in metric tons)

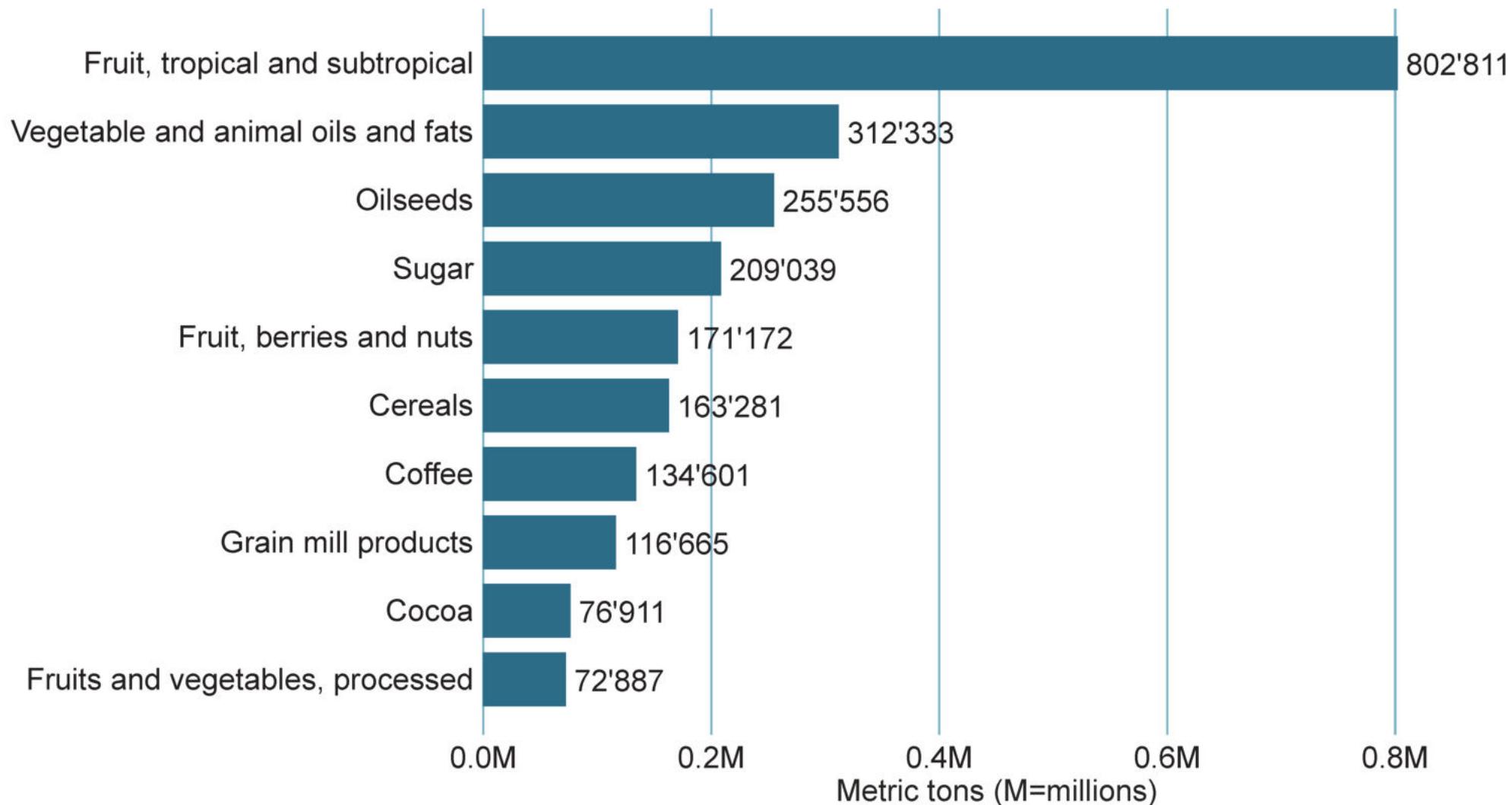


The development of total organic imports to the European Union 2020 in metric tons



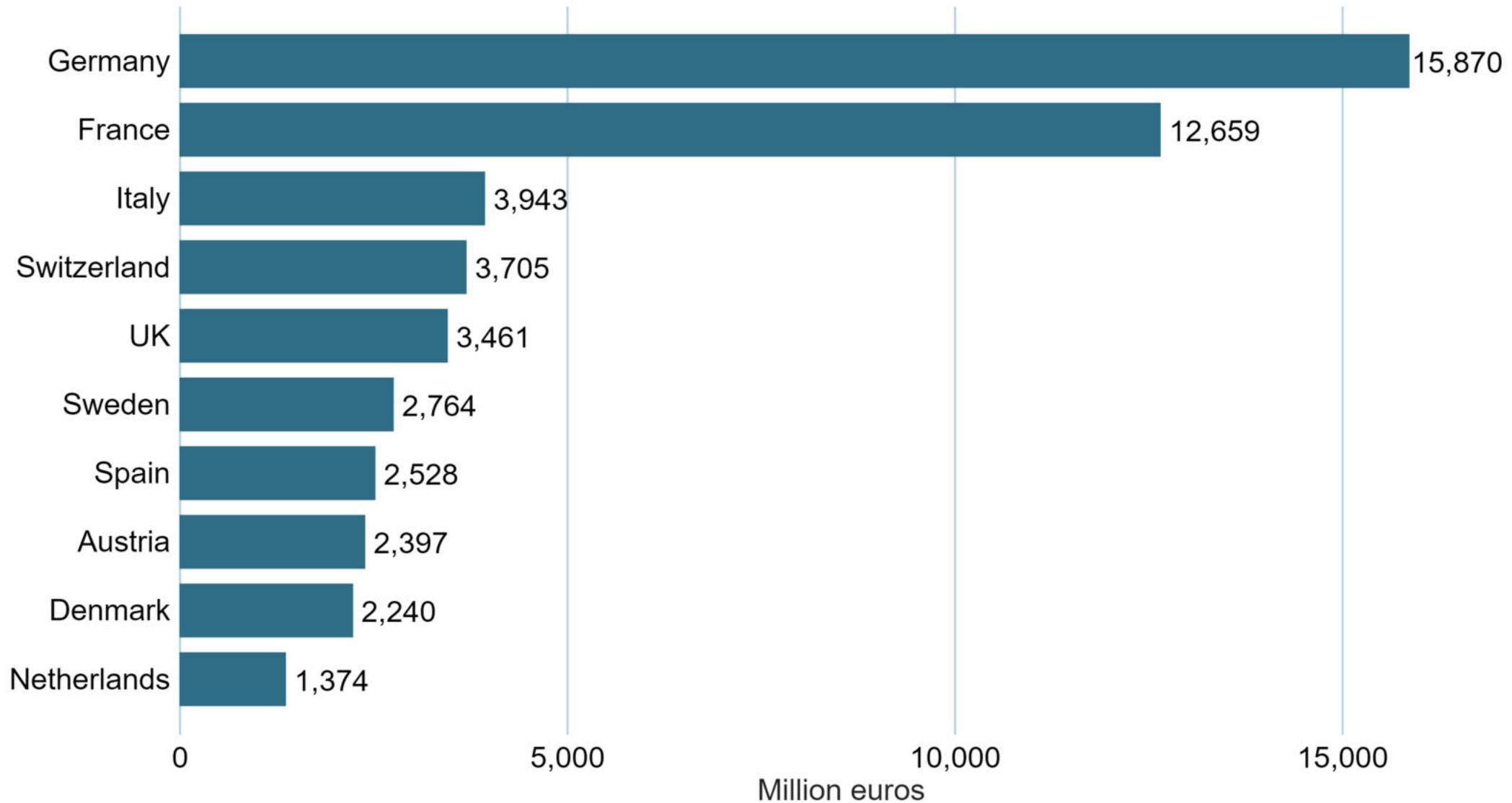
European Union: Main product categories of EU organic agri-food imports 2021

Source: Traces/European Commission 2023



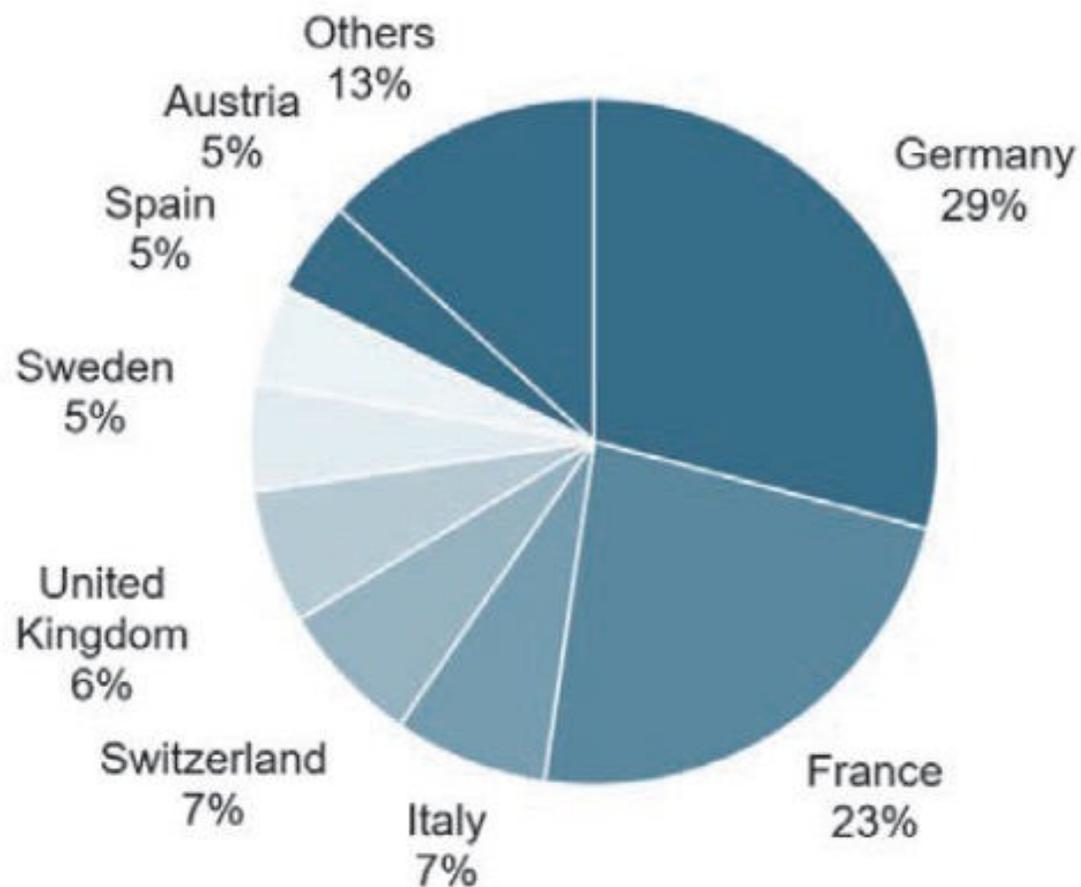
Europe: Organic retail sales by country 2021

Source: FiBL survey 2023



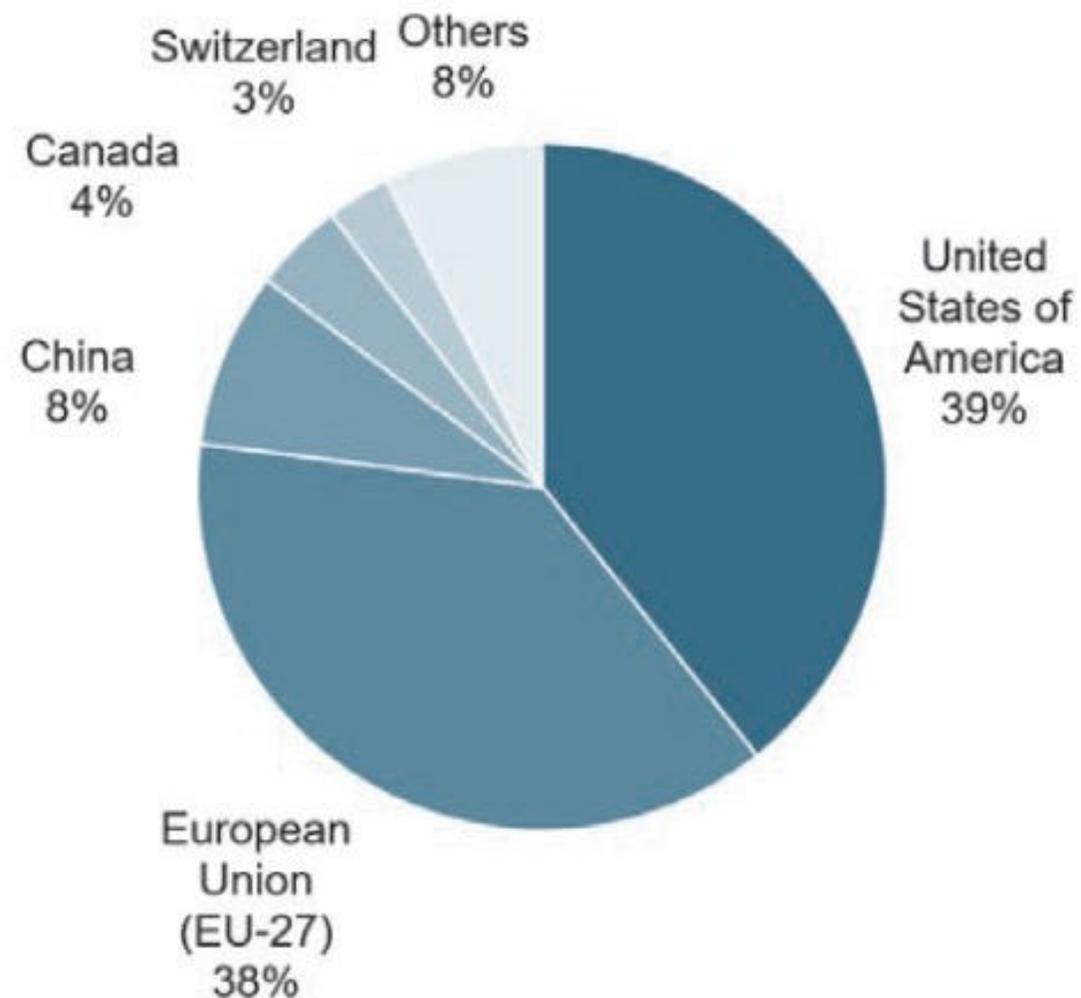
Europe: Distribution of retail sales by country 2021

Source: FiBL-AMI survey 2023



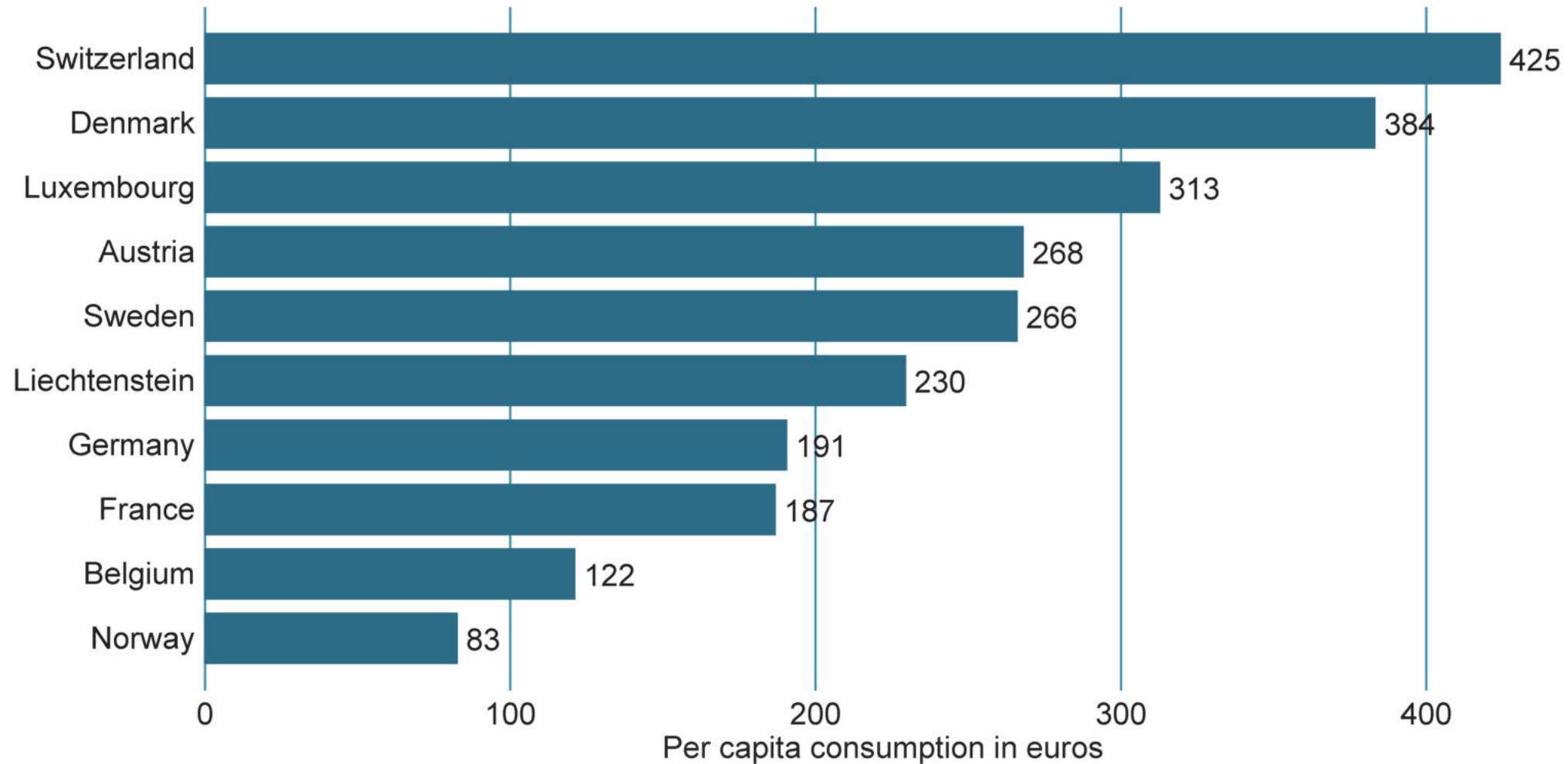
World: Retail sales by single market 2021

Source: FiBL-AMI survey 2023



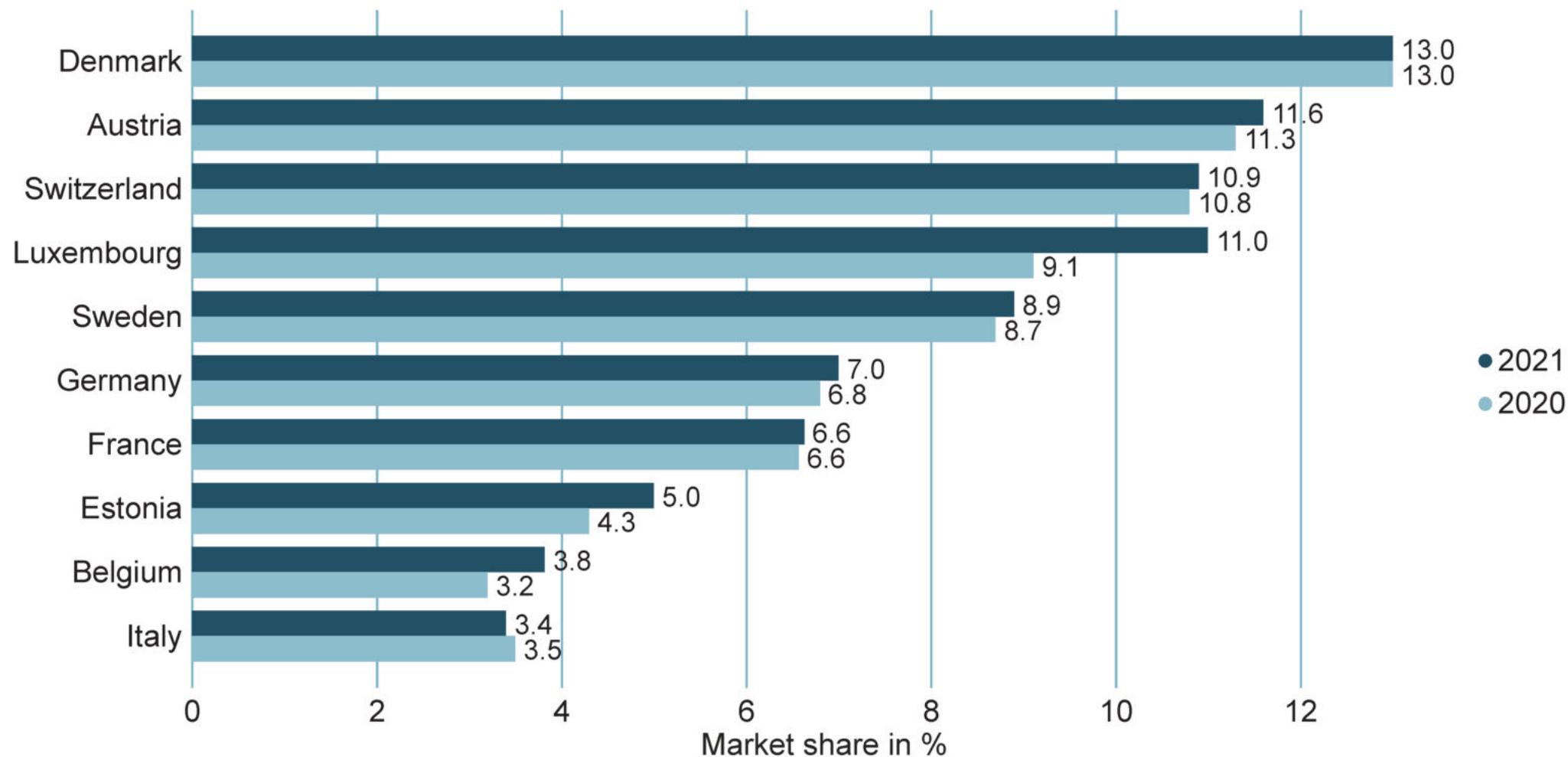
Europe: The countries with the highest per capita consumption 2021

Source: FiBL-AMI survey 2023



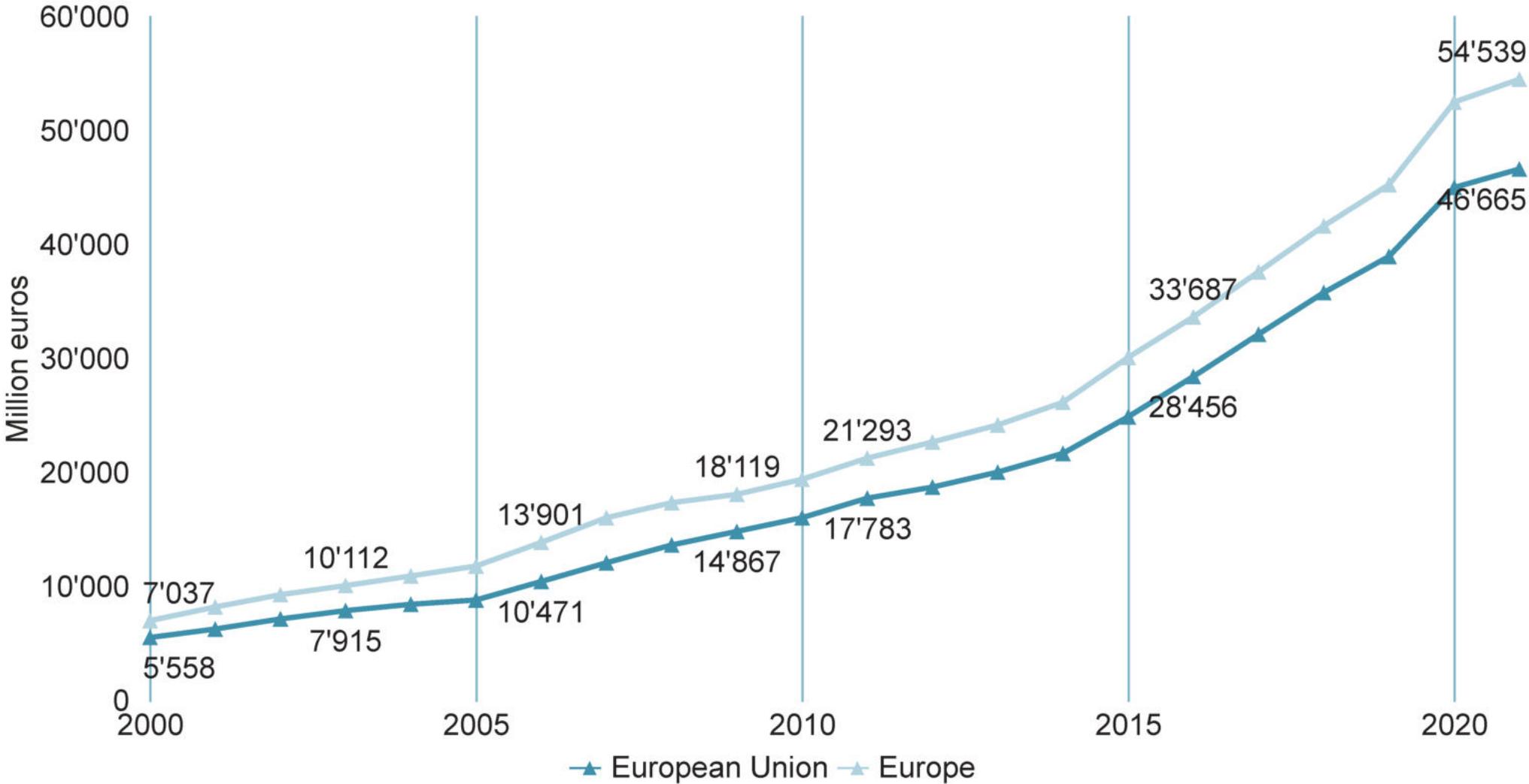
Europe: The countries with the highest shares of the total retail sales 2020 and 2021

Source: FiBL-AMI survey 2023



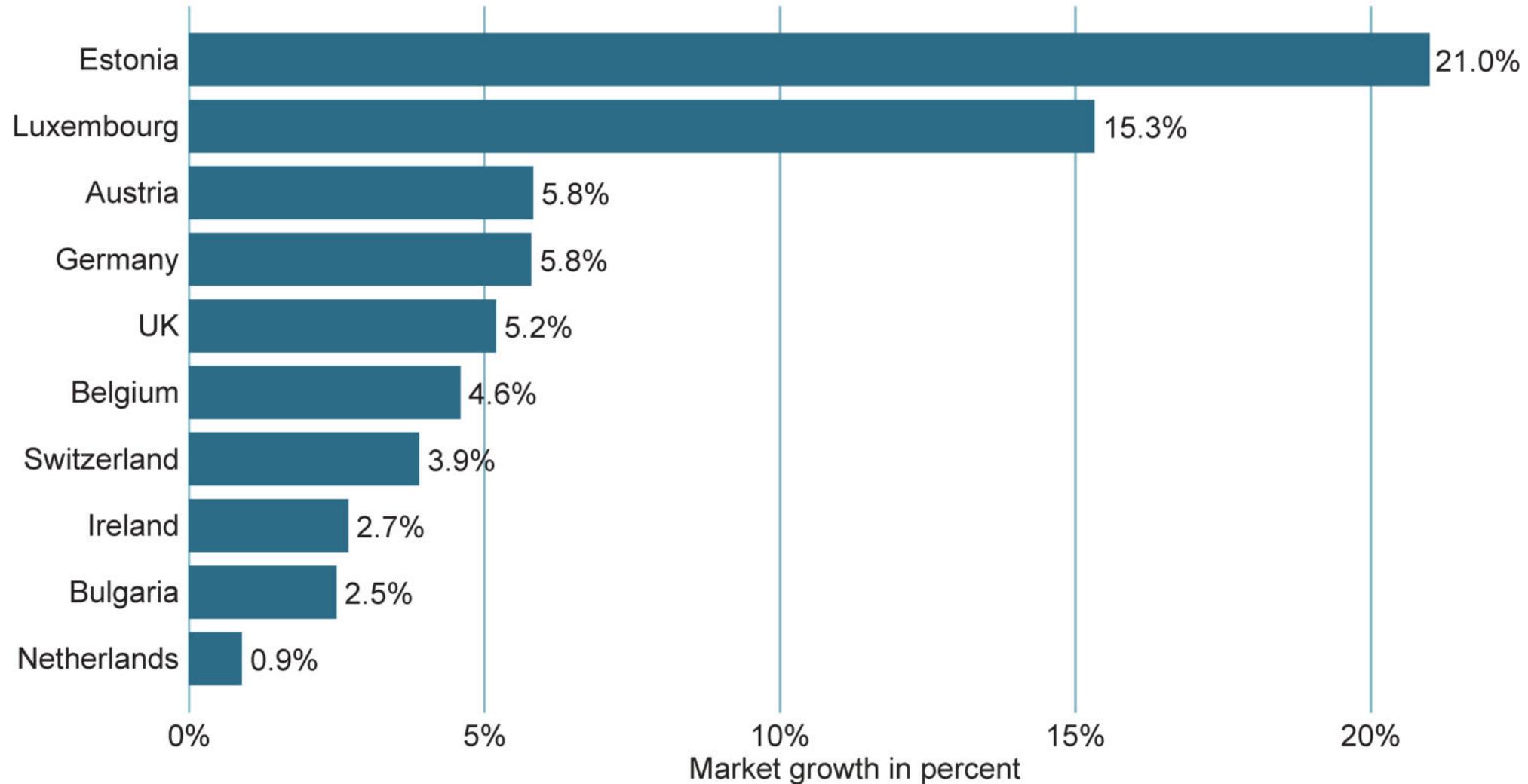
Europe and the European Union: Growth of organic retail sales 2000 - 2021

Source: FiBL-AMI surveys 2001-2023



Europe: The countries with the highest organic market growth 2021

Source: FiBL-AMI survey 2023

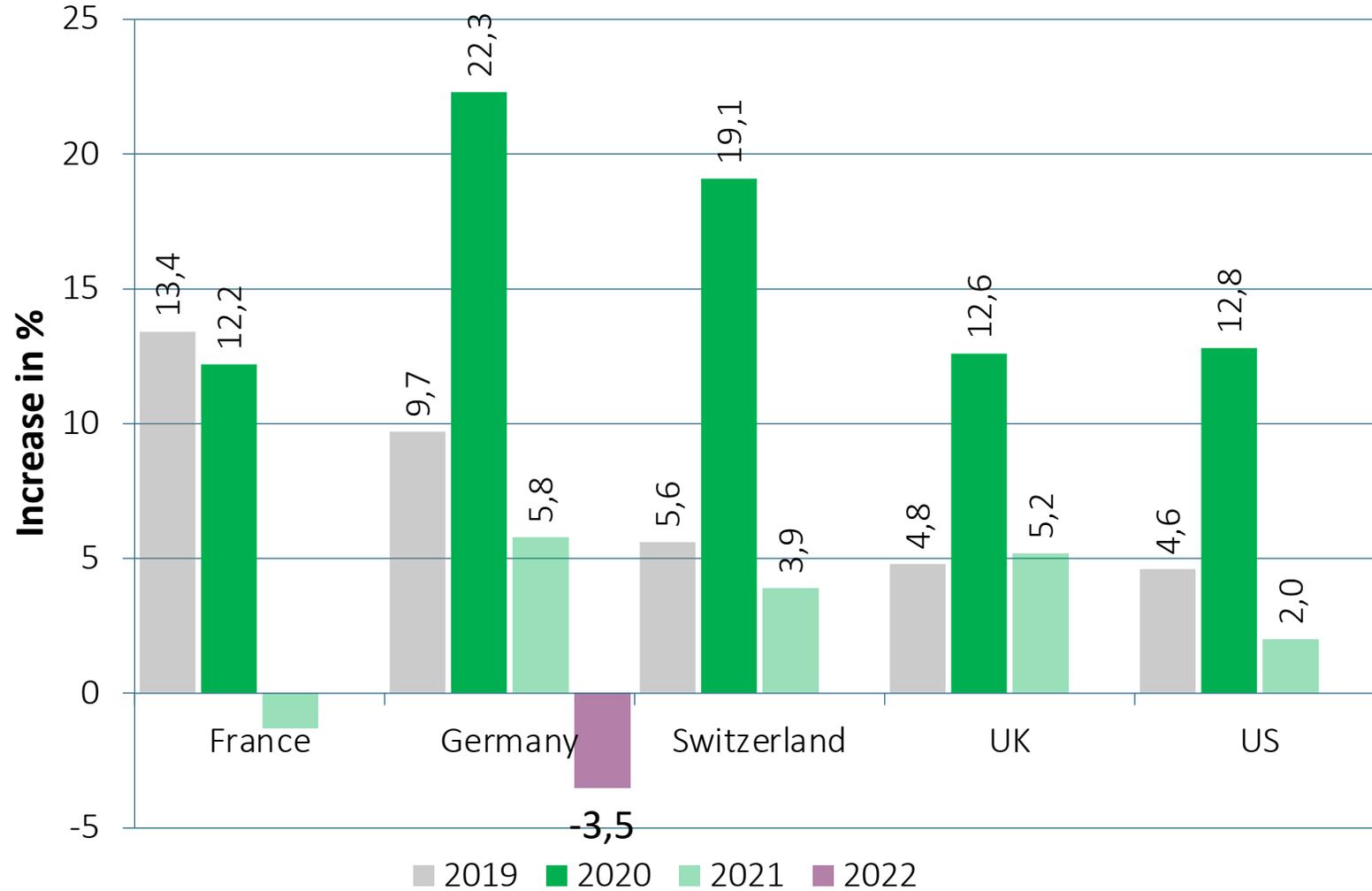


Postpandemic and war in Ukraine

- 2021
 - The pandemic continued to sustain organic markets in many European countries in 2021, but not to the same extent as in the first Corona year of 2020, when the market grew by 15 percent. (2021: +3.8%)
 - In addition, normal life returned in many countries in the second half of the year. People cooked less at home and travelled more.
- 2022
 - The cost of living went up in many countries, with inflation reaching unprecedented levels of 10 percent and people saved on food.
 - Nevertheless, buying organic remains a relevant topic; however, people are trying to buy organic products cheaper.

Market growth rates 2019, 2020 and 2021 compared

Source: FiBL-AMI survey 2022



After the lockdown years, consumers are spending less money on food for consumption at home.

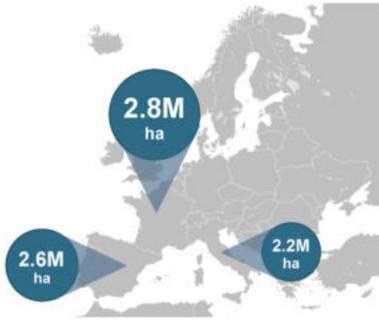
Market growth compared

Conclusions

- Data show that in in 2021 in Europe the organic farmland and market continued to grow, even though slower than in the previous years. Imports remained stable, however with a shift towards tropical products.
- Only few data were available for 2022 in February 2023; it remains to be seen how the organic market and area will developed that year - characterised by inflation and higher energy prices.
- 2023 is expected be a challenging year for the organic sector.
- To reach the EU Farm to Fork target of 25 percent organic farmland in the European Union by 2030, appropriate and timely support measures are needed.

Organic Agriculture in Europe 2021

Organic Farmland

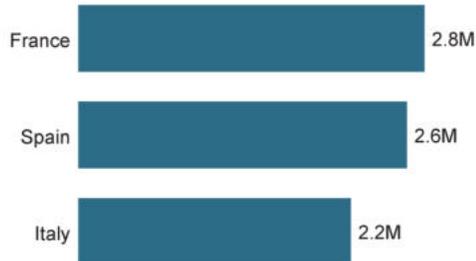


17.8M ha Organic farmland in million (M) hectares (ha)

4.4% Growth 2020/2021

3.6% Organic share of total farmland

Farmland in million (M) hectares Top 3 countries



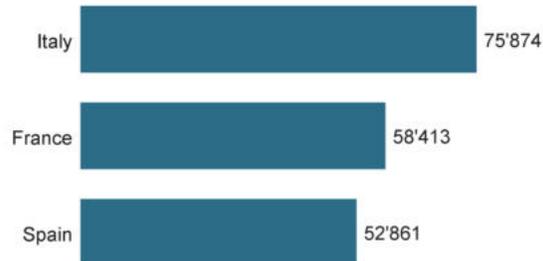
Organic Producers

The number of organic producers is increasing

442'274 Organic producers

5.8% Growth 2020/2021

Number of producers Top 3 countries



Organic Market

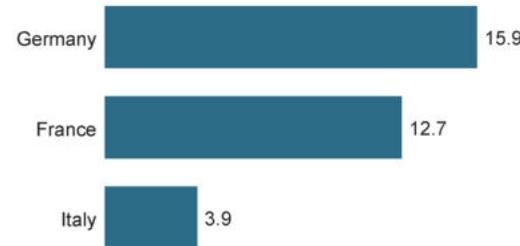
The European market is growing

54.5 Europe's organic retail sales in billion euros

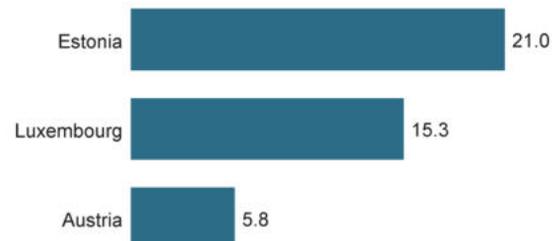
66 Per capita spending in euros

3.8% Organic market growth 2020/2021

Market in billion euros Top 3 countries



Market growth in percent Top 3 countries



Kontakt

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- helga.willer@fibl.org
- www.fibl.org, www.organic-world.net, statistics.fibl.org

- Helga Willer, Bernhard Schlatter, Jan Trávníček(Hrsg.) (2023): The World of Organic Agriculture. Statistics and Emerging Trends 2023. Research Institute of Organic Agriculture FiBL, Frick, and IFOAM – Organics International, Bonn
- <http://www.organic-world.net/yearbook/yearbook-2023.html>

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North America

Organic by the Numbers

Tia Loftsgard, Executive Director
Biofach February 15, 2023



Canada Organic Trade Association

Strategic Areas of Focus:

- MARKET ACCESS
- MARKET RESEARCH
- EDUCATION
- GOVERNMENT RELATIONS



Canadian Organic Market

\$9.35 Billion CAD
Annual Sales



80% of total is Food and Beverage \$7.236 Billion CAD

Organic Market

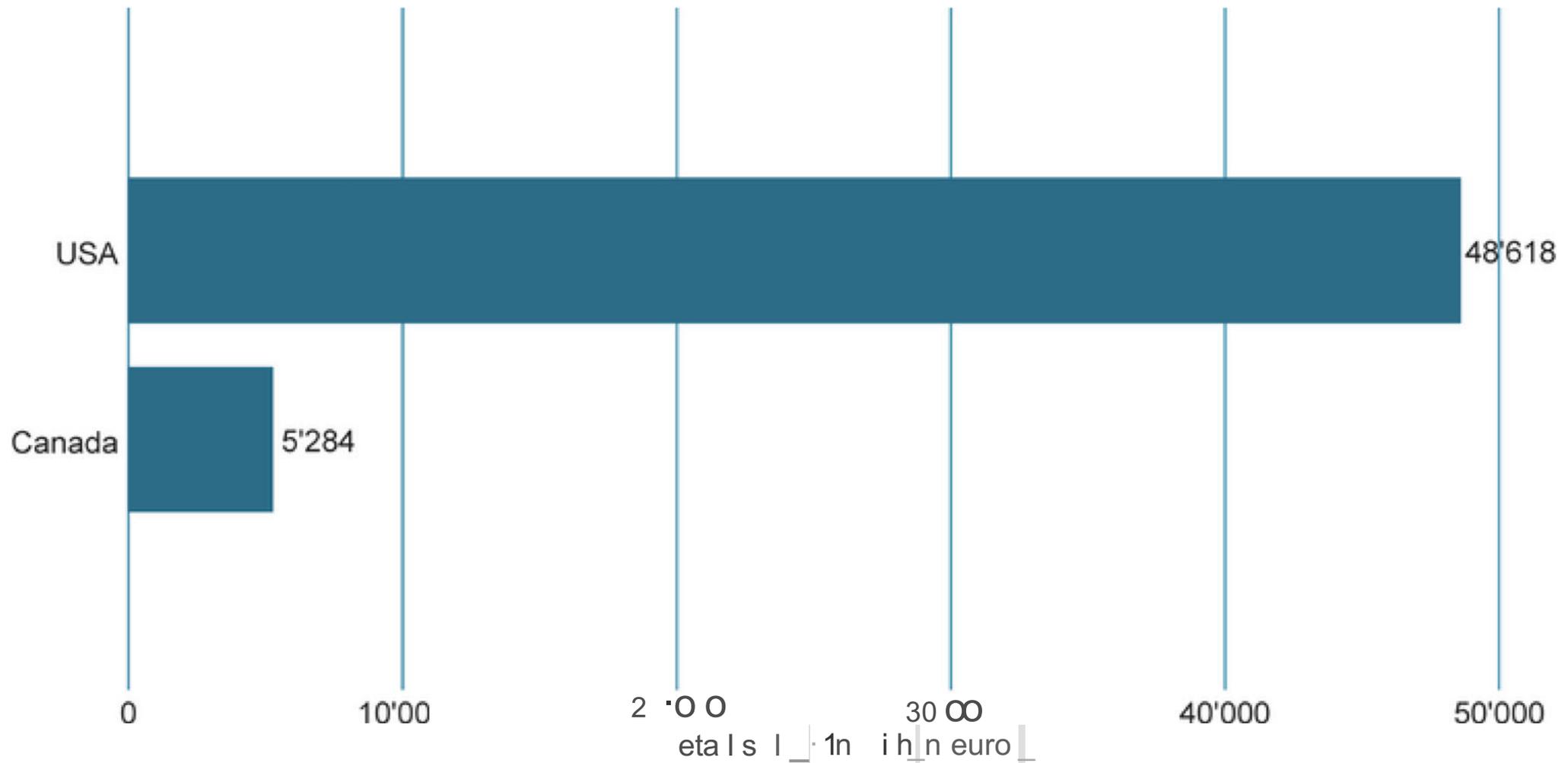
Fibre & textiles has 2.5%
market share

10.2% growth of the non-
food sector



Northern America: The countries with the highest organic retail sales in 2021

Source: FiBL-AMI survey 2023



Canadian Organic Market



CONSUMER PREFERENCES



On average,
Canadians spend

\$184

weekly on
organic groceries



23%

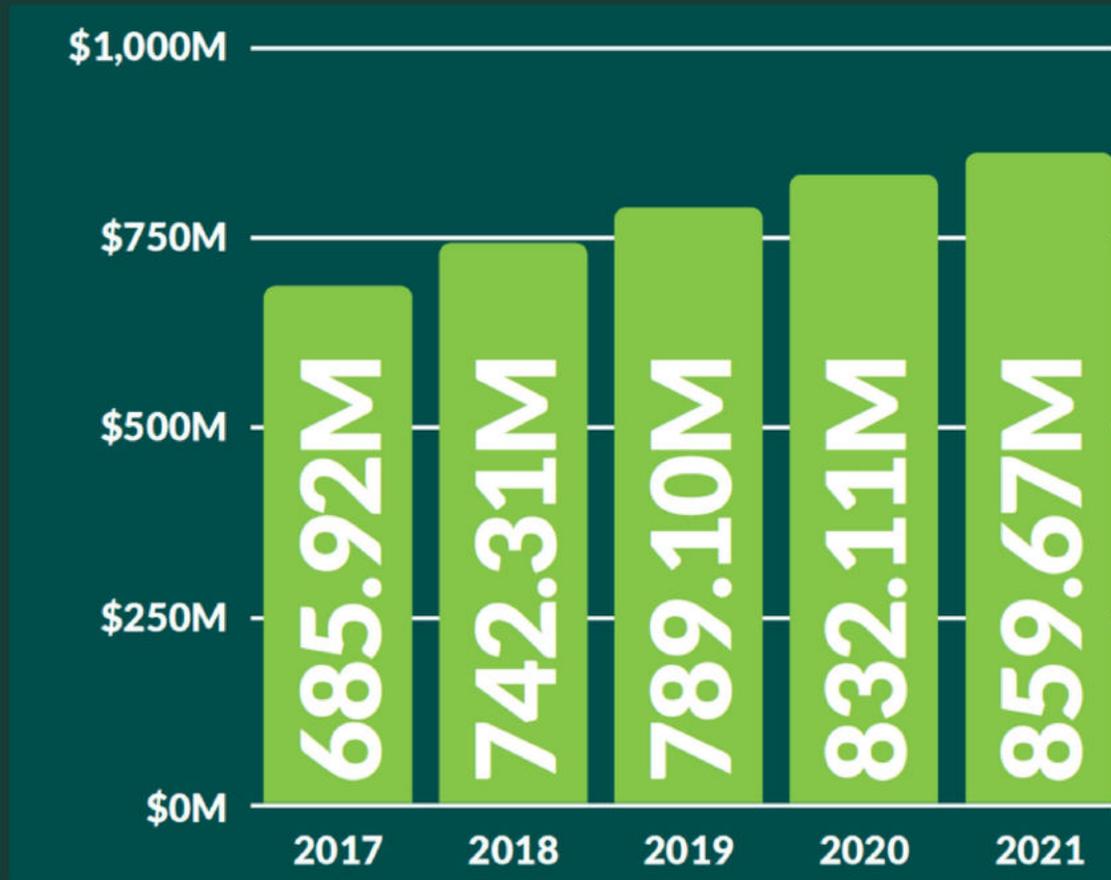


of Canadians
are buying
more organic
than a year ago

54%

of Canadians
say they trust
Canada Organic
Certified

Organic Trade: Imports



*60% of imports are from the USA

\$859.7M

Organic Trade: Exports



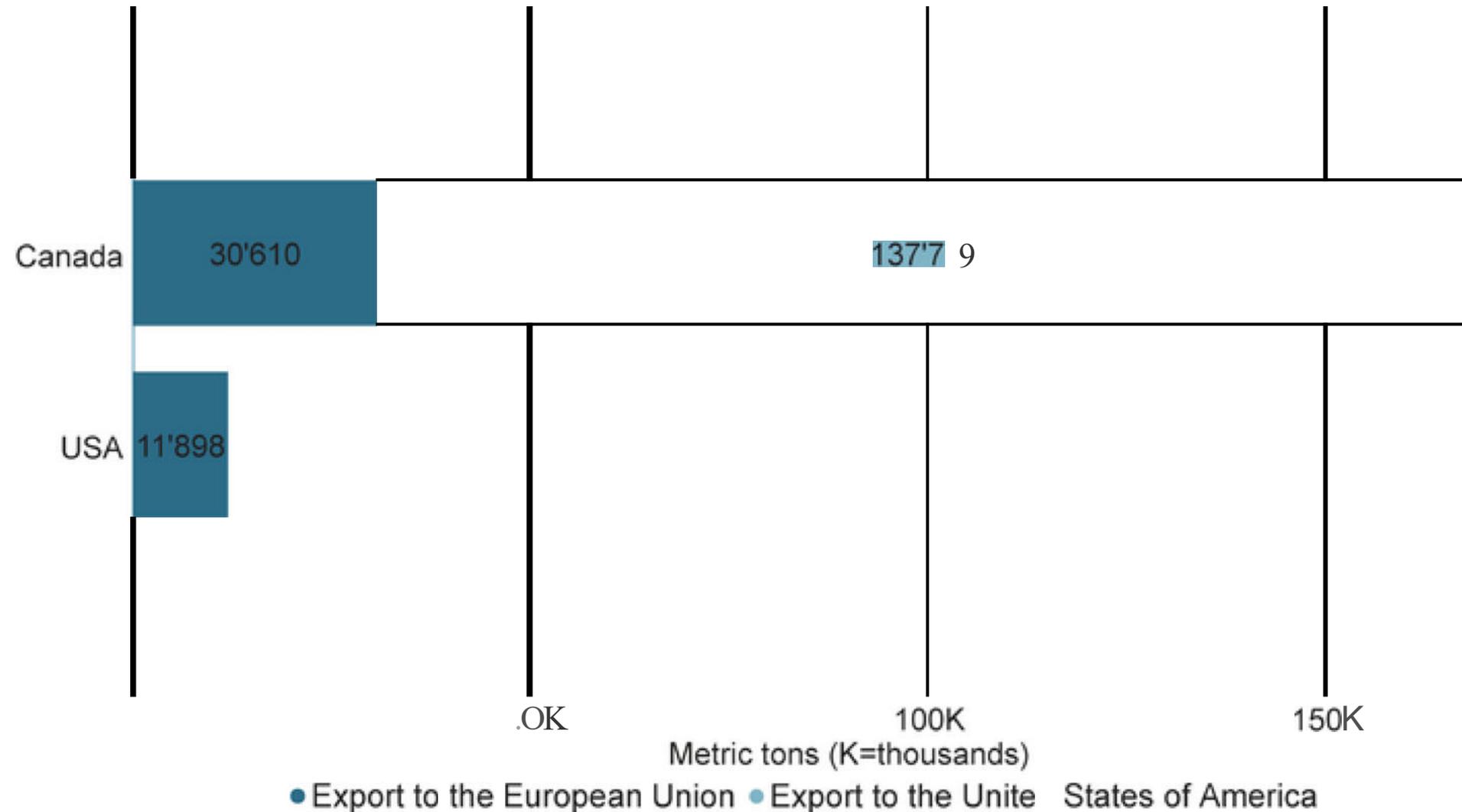
\$417.3M



2021 HS Code Statistics Canada Data

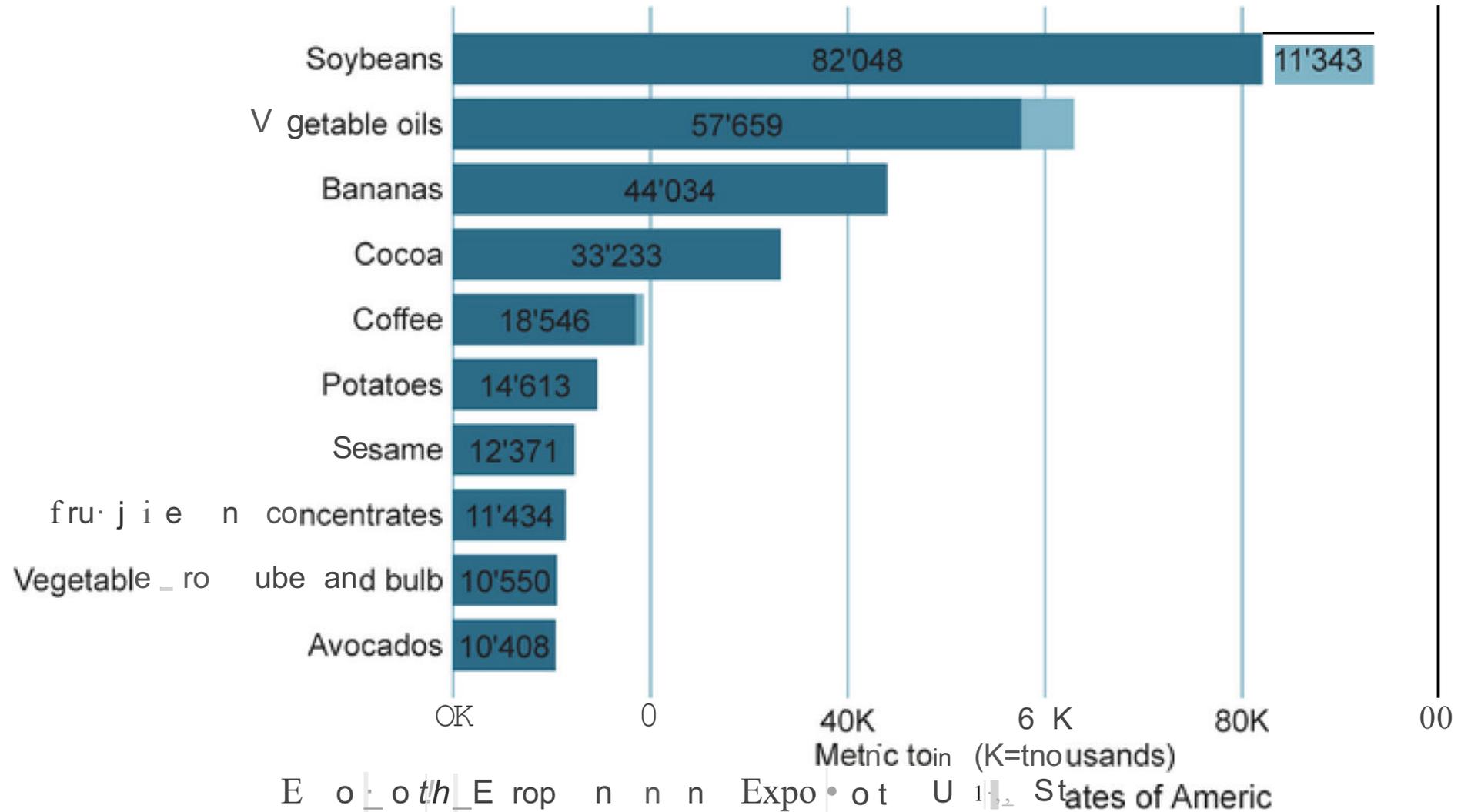
Norther America: Key EU and US export countries in 202

Source: Traces/European Commission 2022, GATS/USDA 2022



Northern America: Key commodity groups exported to the EU and US in 2021

Sources: Eurostat/European Commission 2022, IGATS/USDA 2022

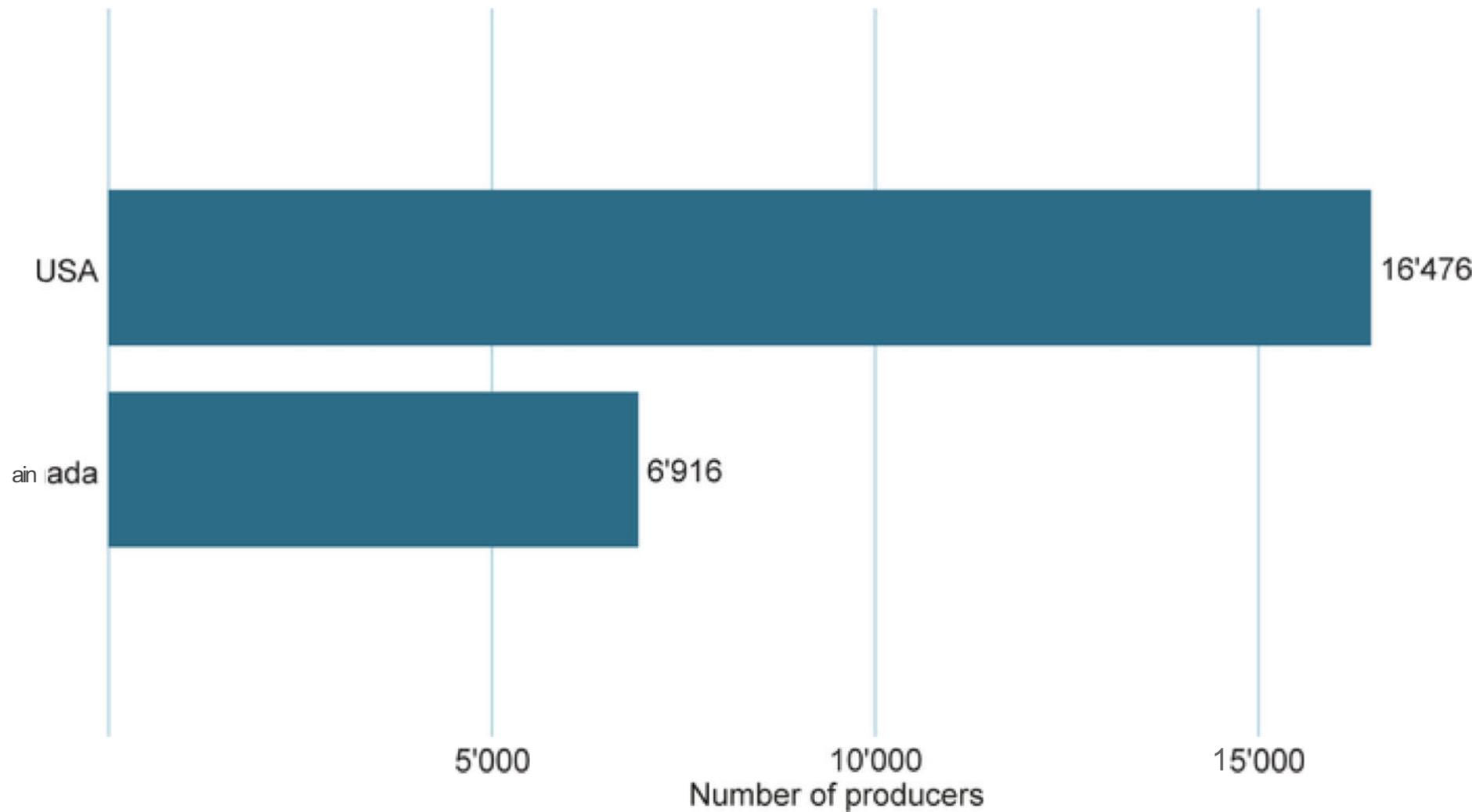


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h · Countries with the largest number of

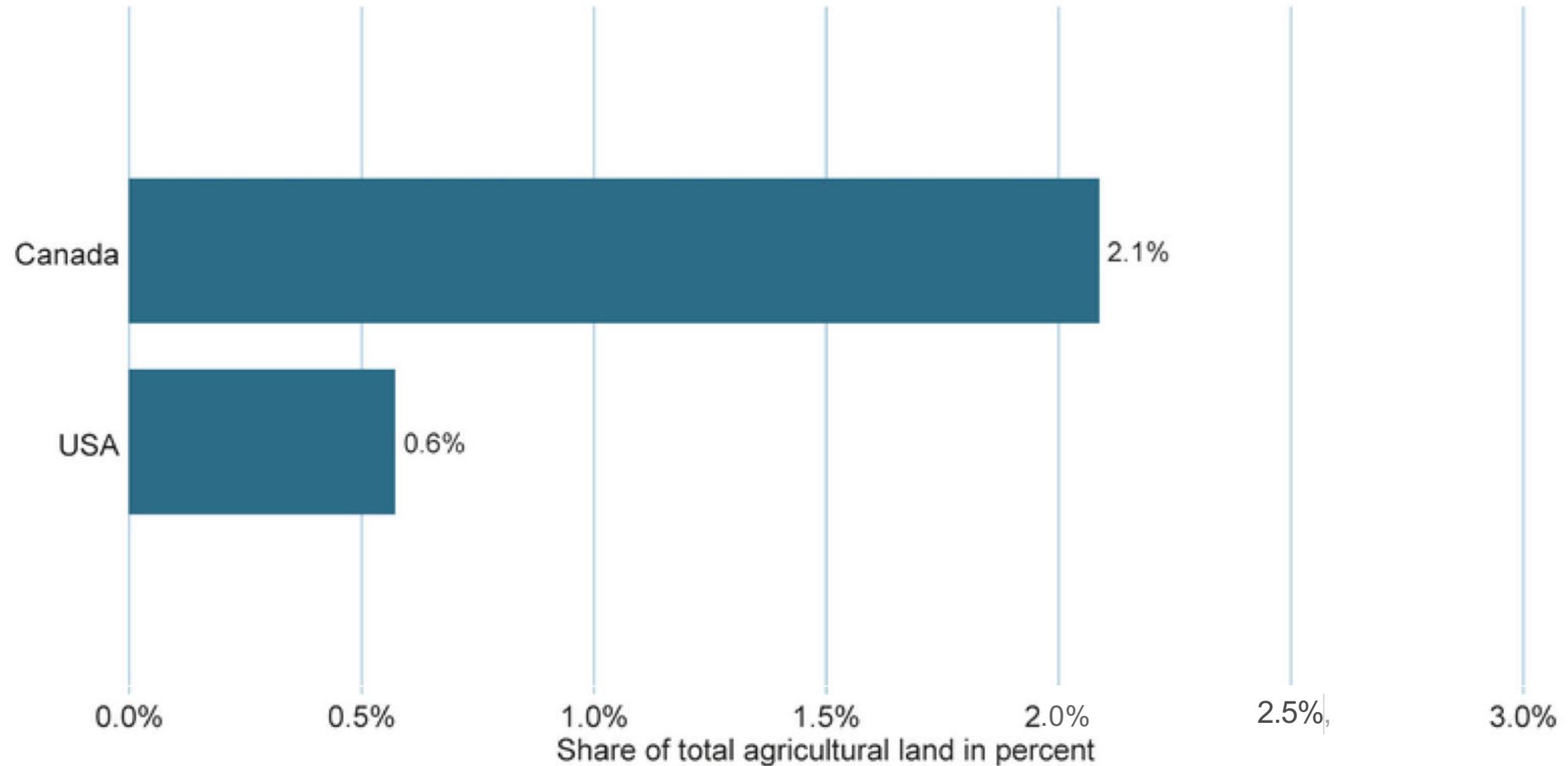
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Source: FIBL survey 2023



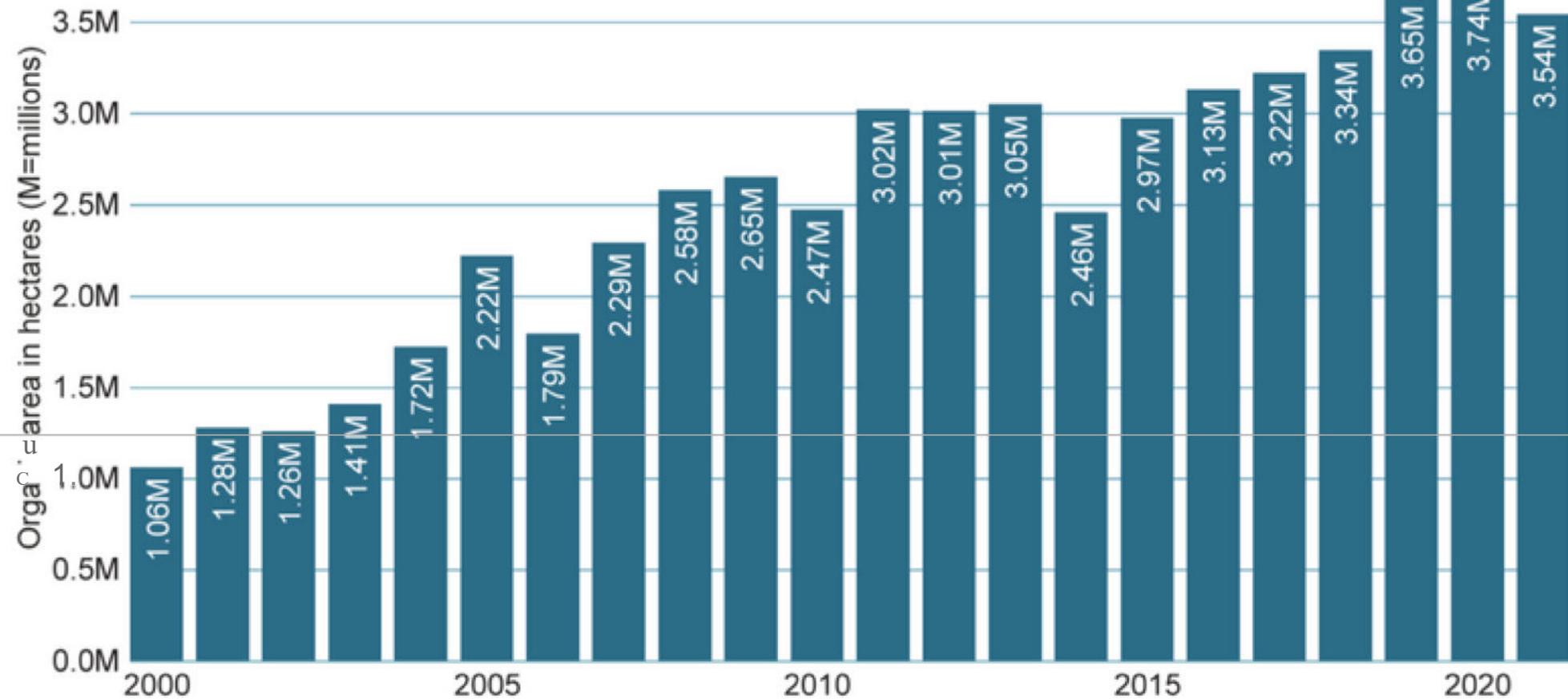
Northern America: Organic share of total agricultural land 2021

Source: COTA and SDA 0-3



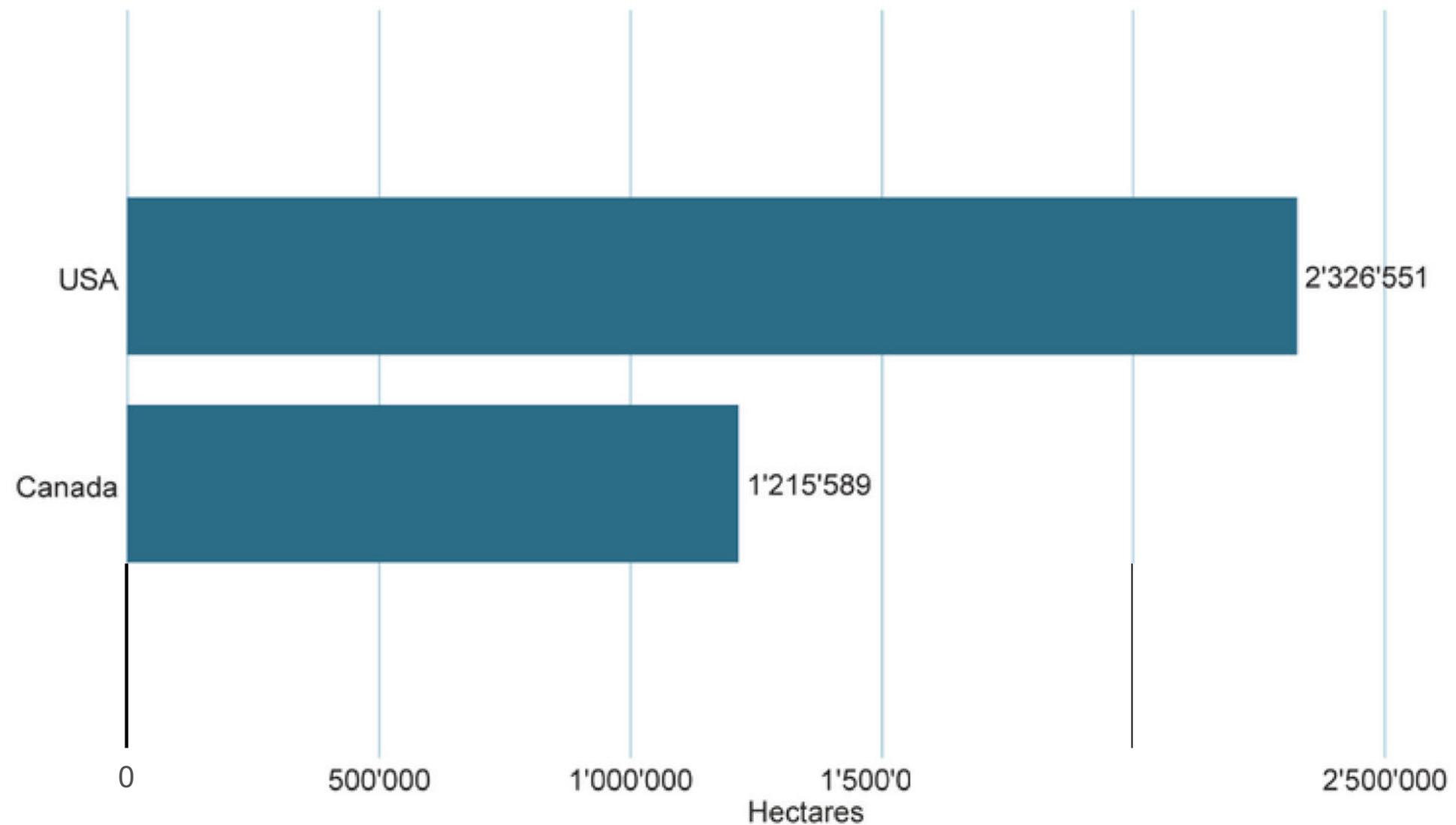
Northern America: Development of organic agricultural land 2000 - 2021

Source: COTA and USDA, 2023



Northern America: Organic agricultural area 2021

Source: COTA and USDA [Previous attachment](#)



Canadian Organic Operators

7998 Operators in 2021

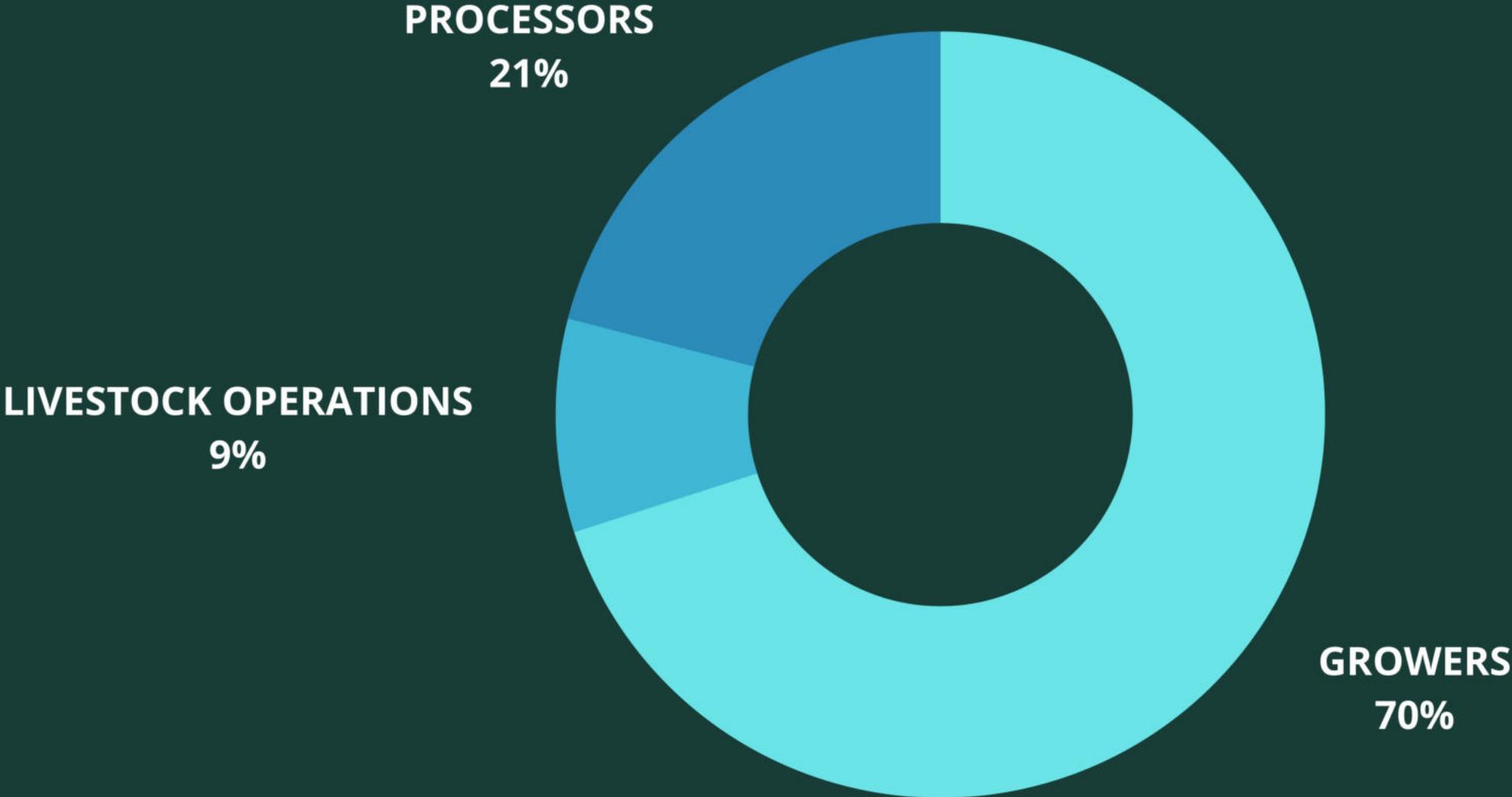


374 newly certified

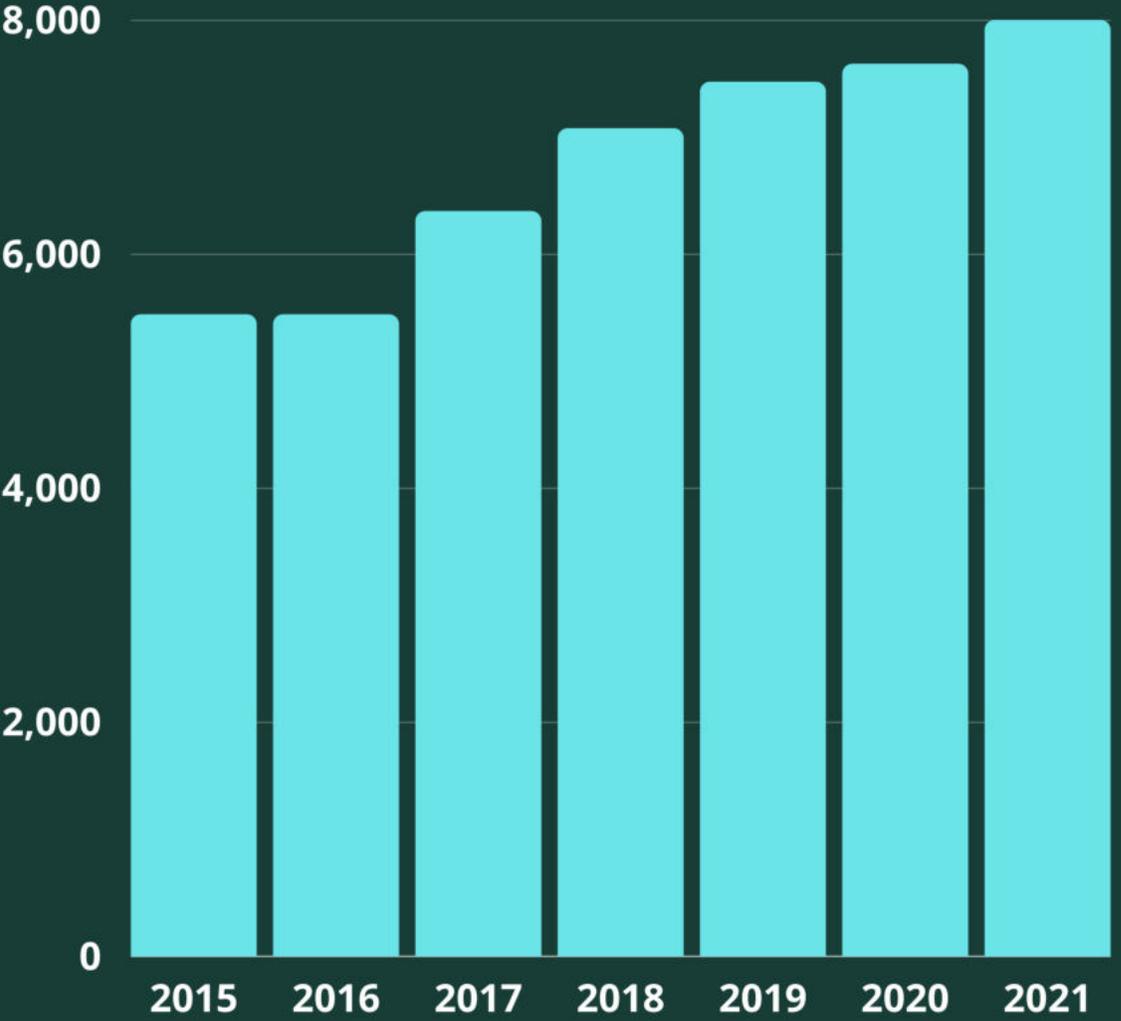


Canada Operators Breakdown

2021 data



Canada Organic Operators



5% Growth year over year



Canadian Organic Acreage Transitioned

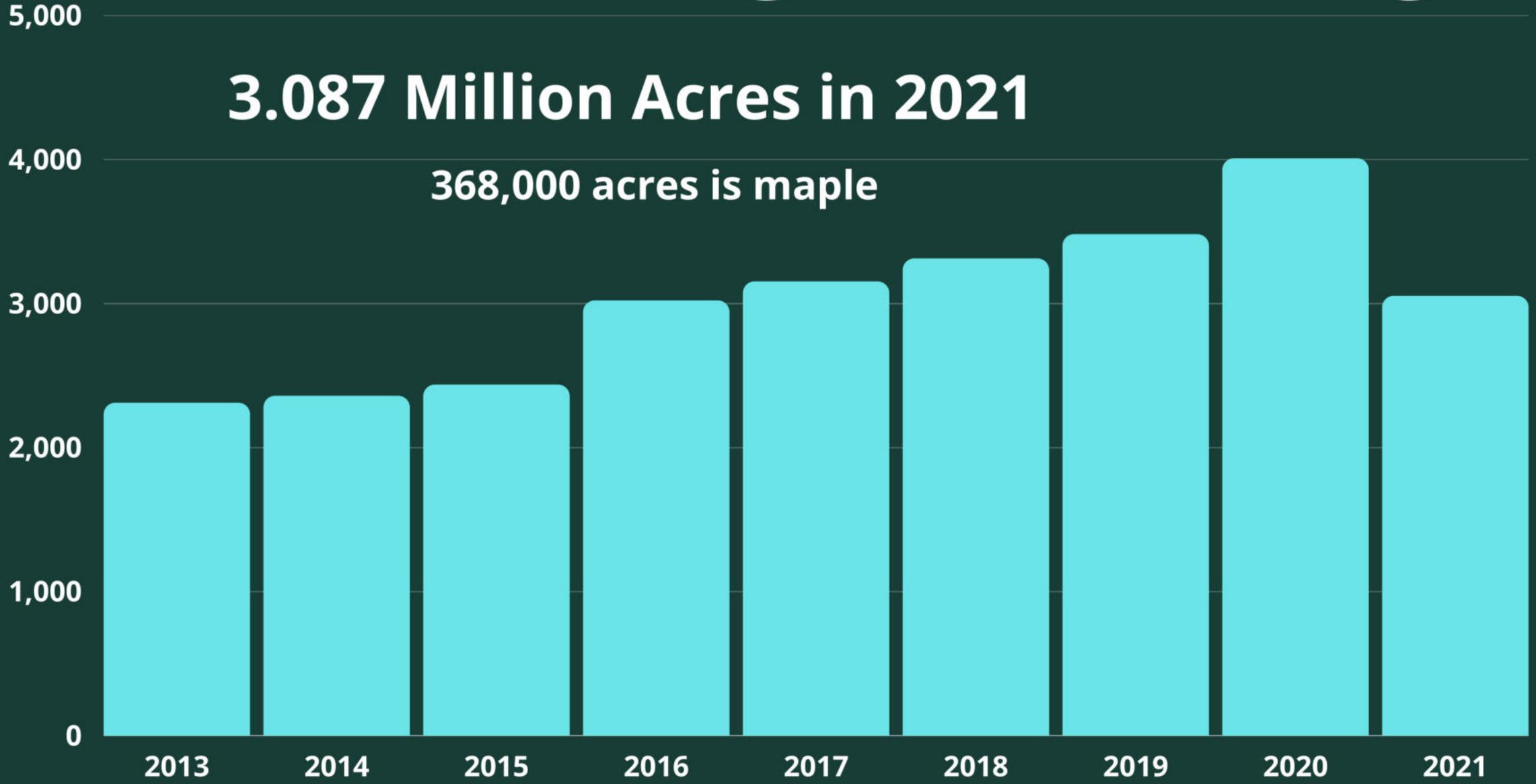
2021



37,330

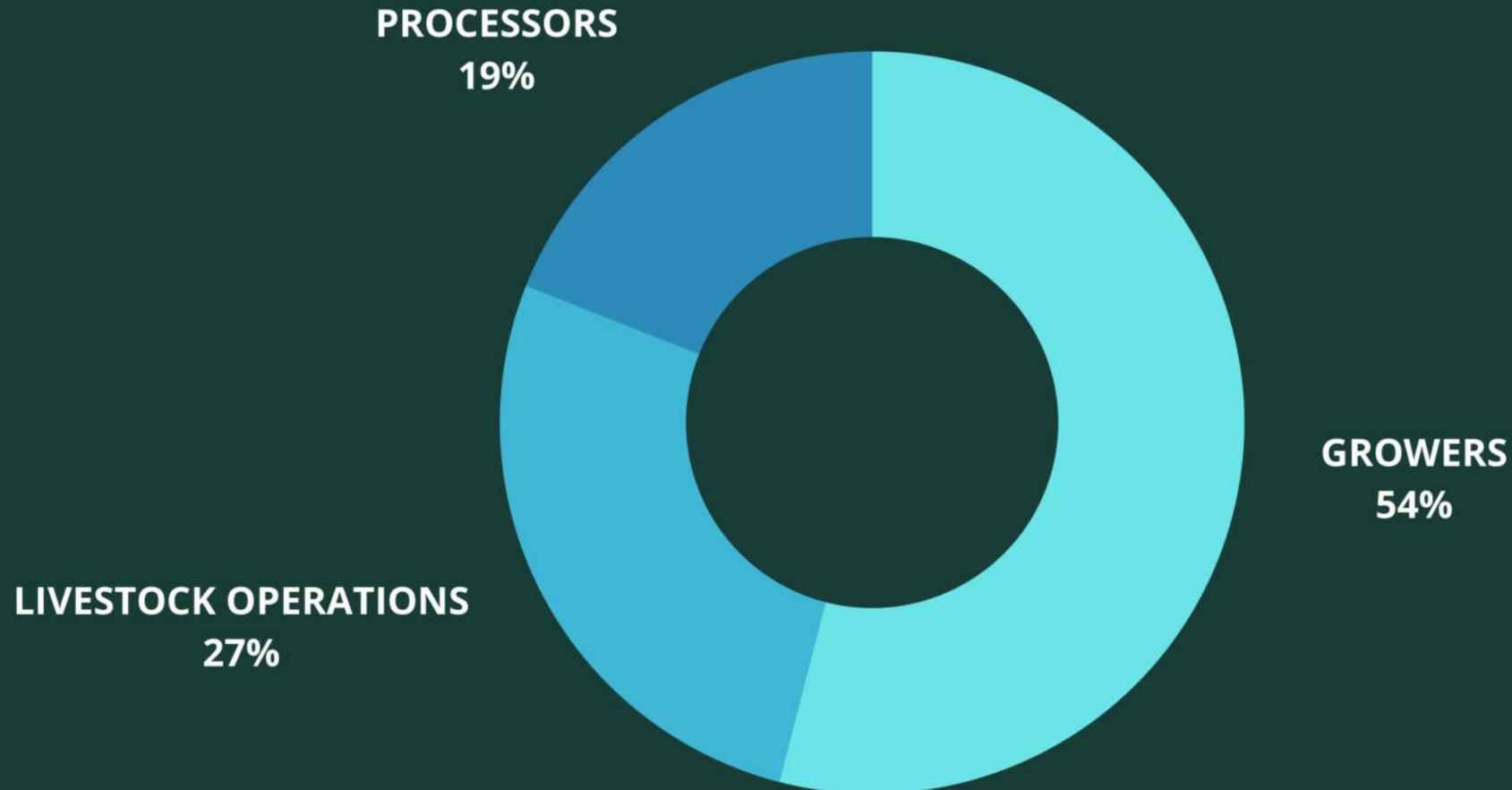
NEW ACRES IN 2021

Canadian Organic Acreage

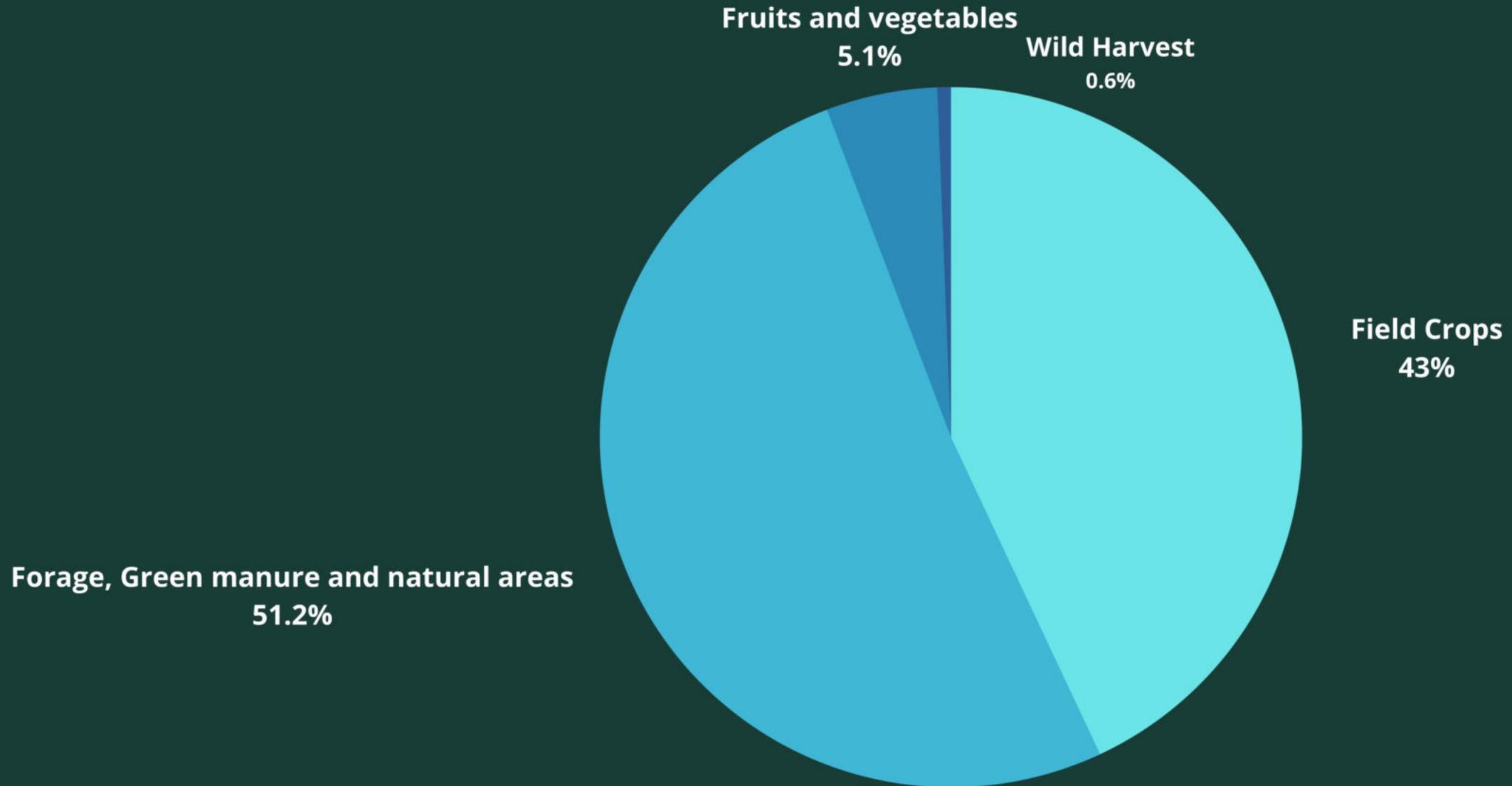


Annual Growth by Category

2015-2021

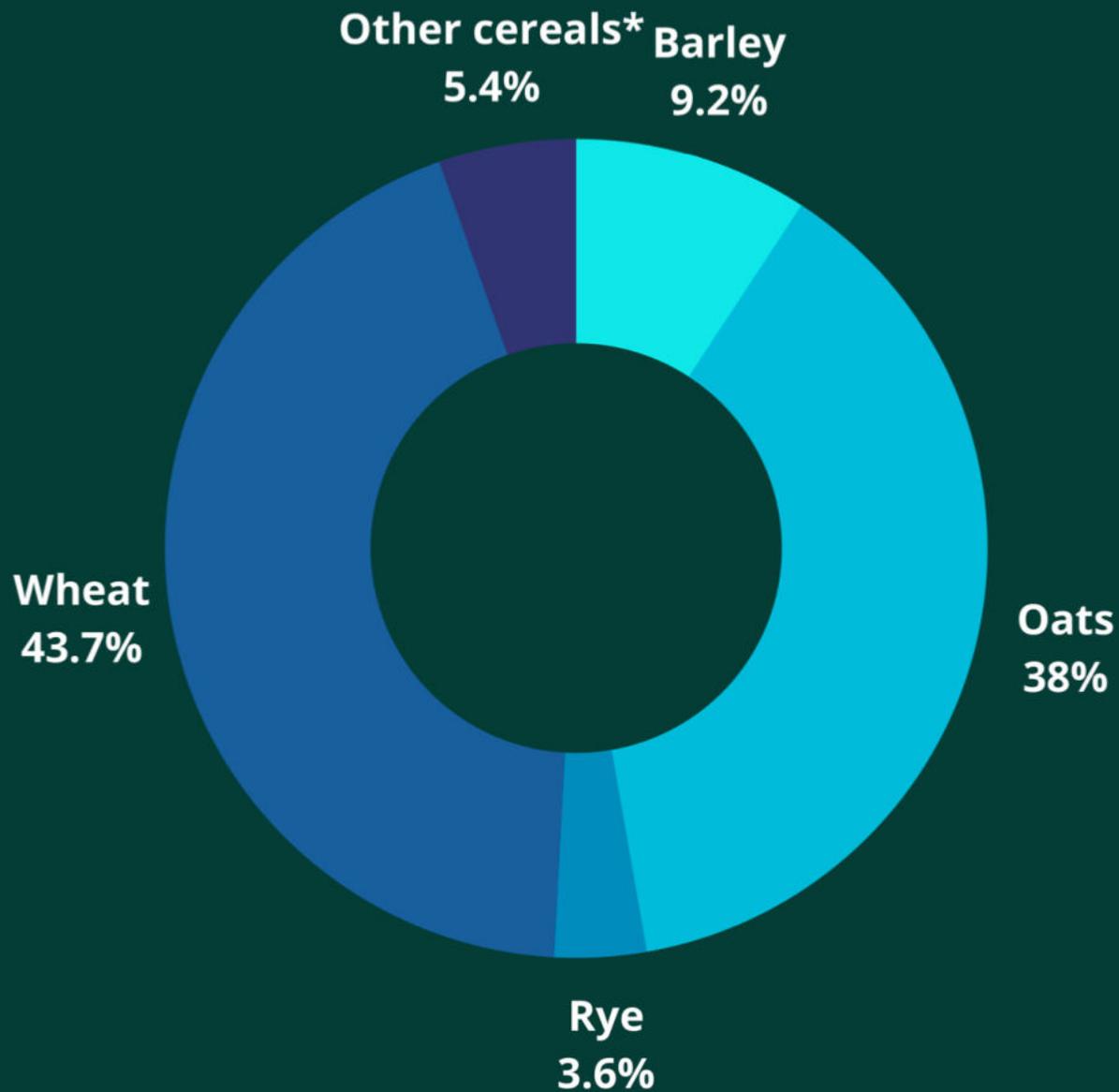


Organic Acreage Breakdown

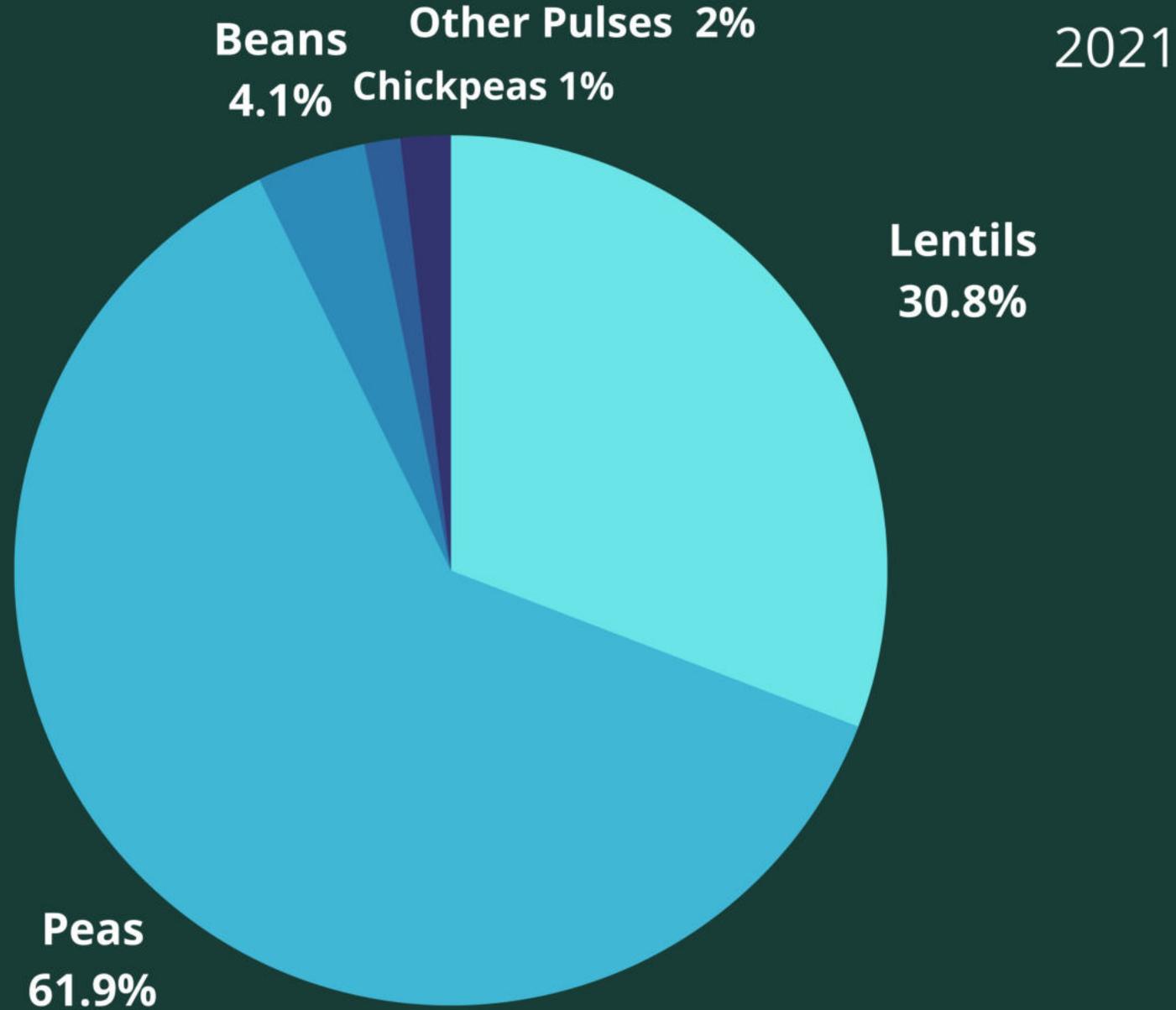


Cereals Breakdown

2021

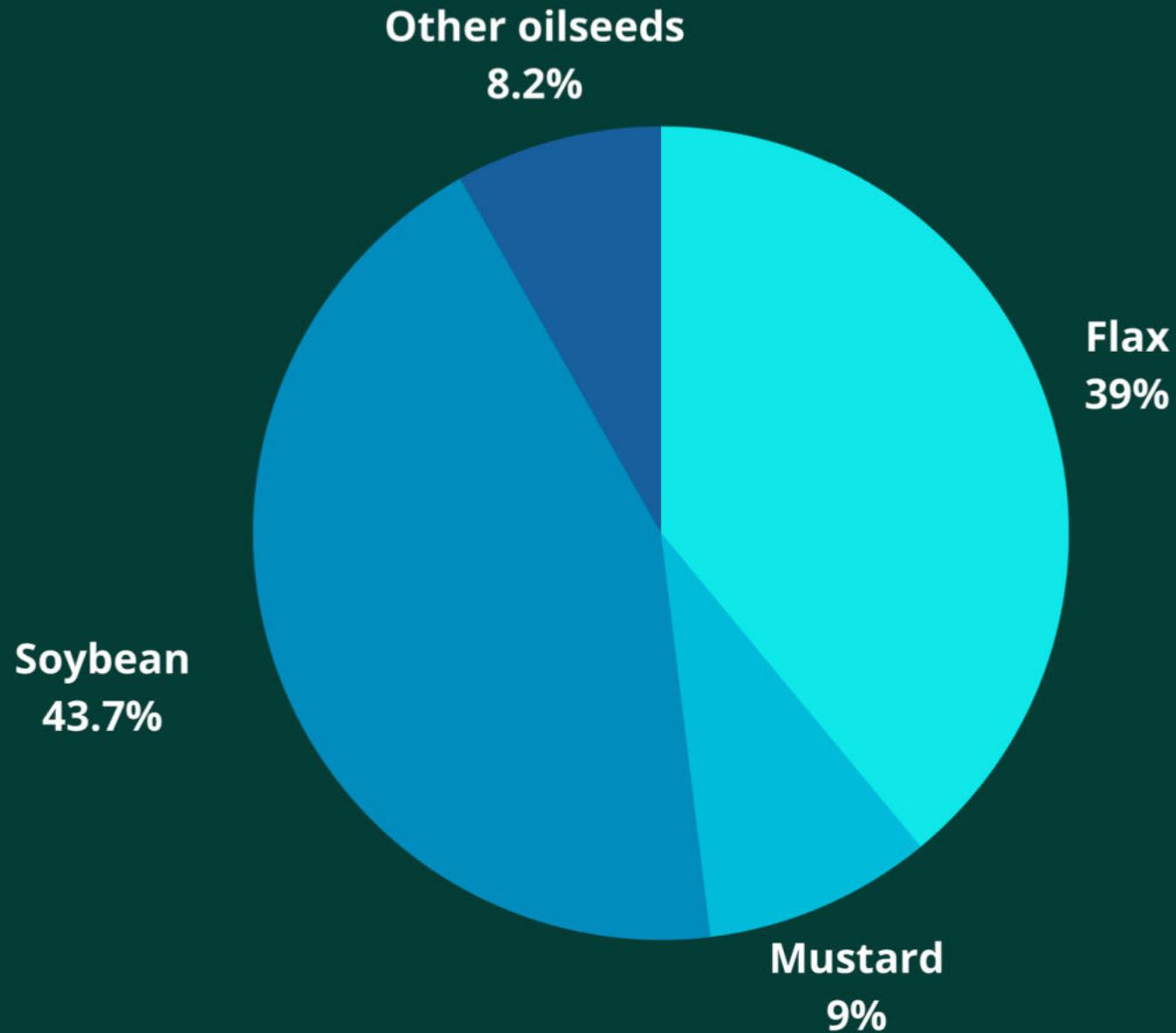


Pulses Breakdown



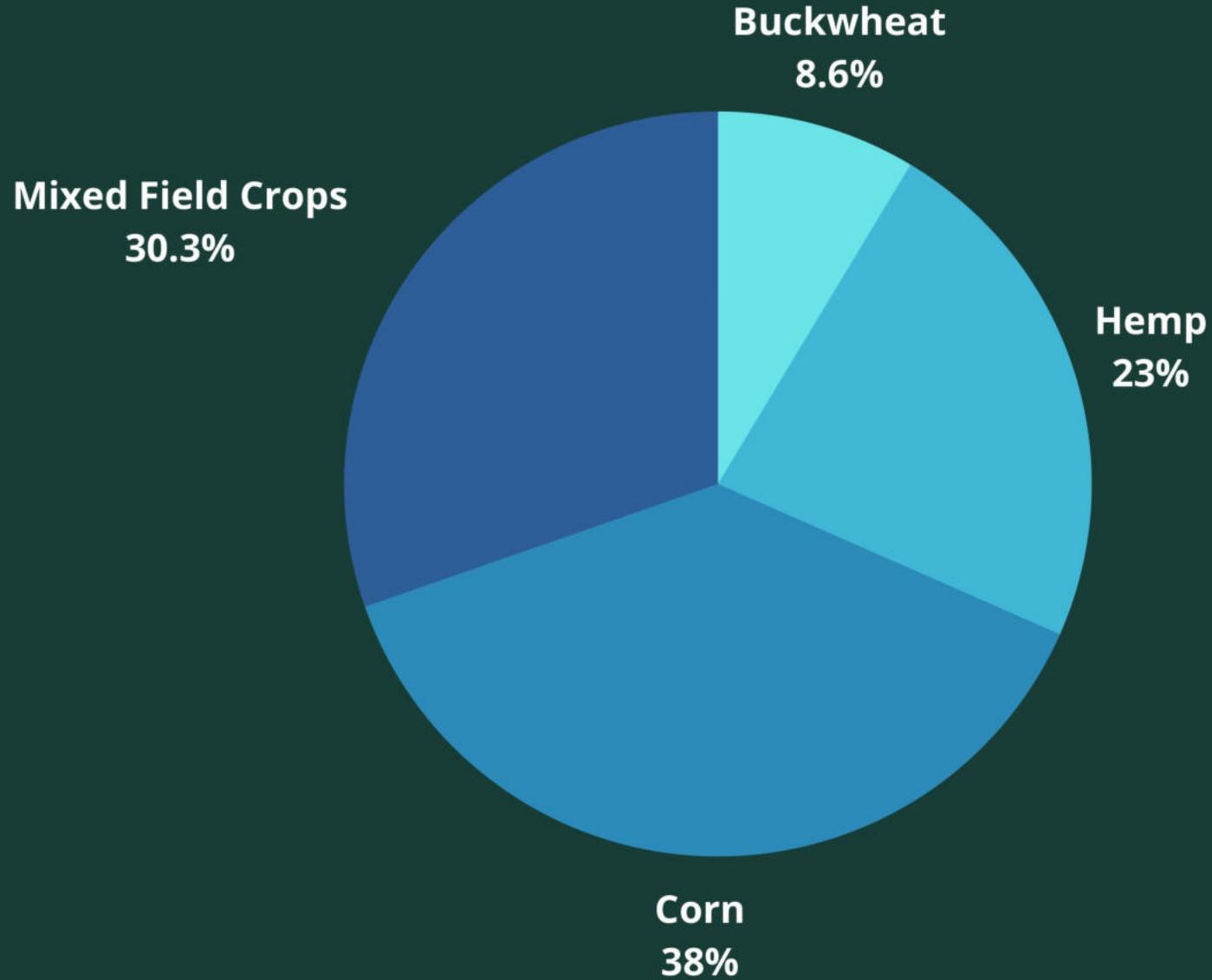
Oilseeds Breakdown

2021



Other Field Crops Breakdown

2021



Organic Growers



6102 Organic Farmers in 2021

130 newly certified

2% growth year over year

Organic Growers



Organic Processors

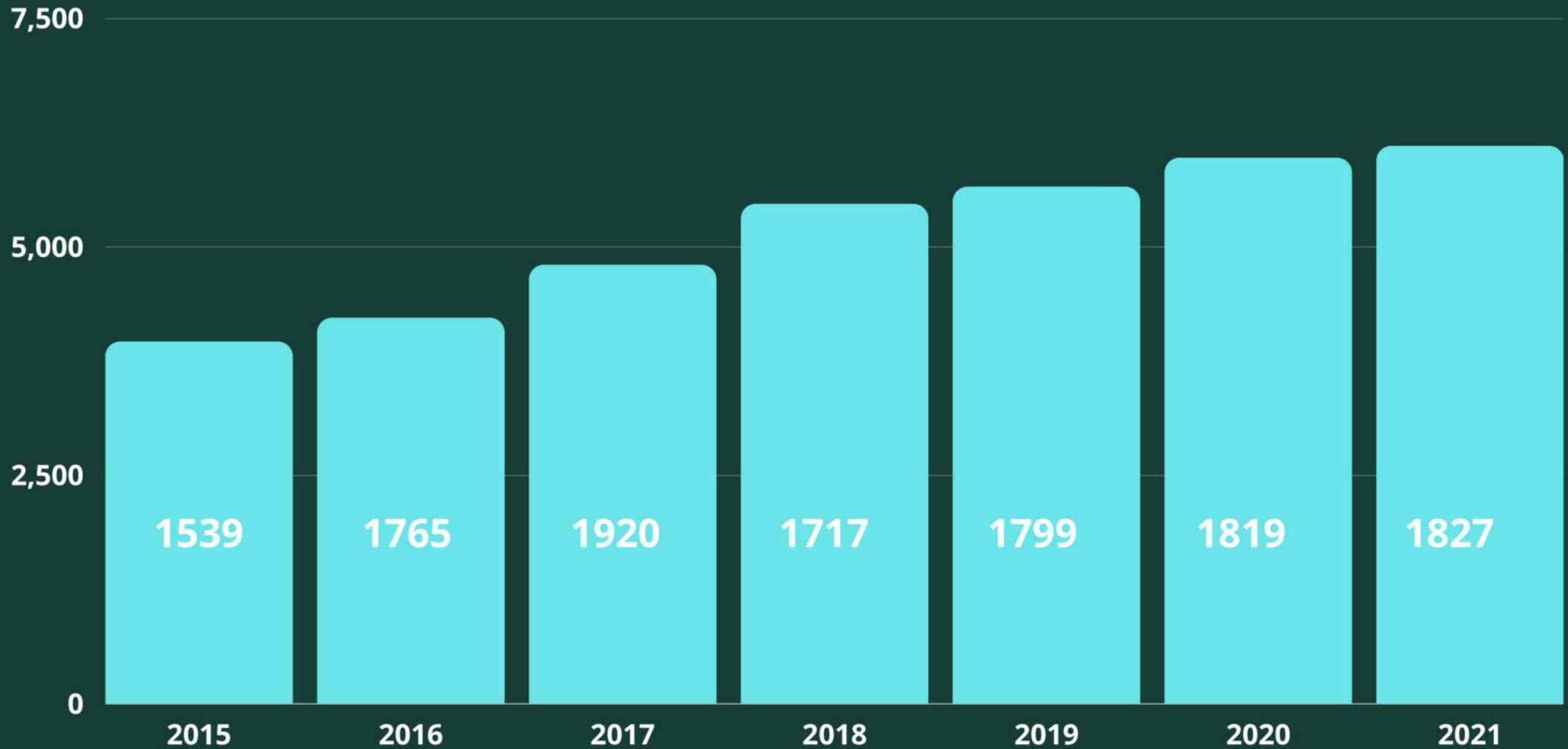


1827 Processors in 2021

8 newly certified

.44% growth year over year

Organic Processors



Organic Livestock Operators

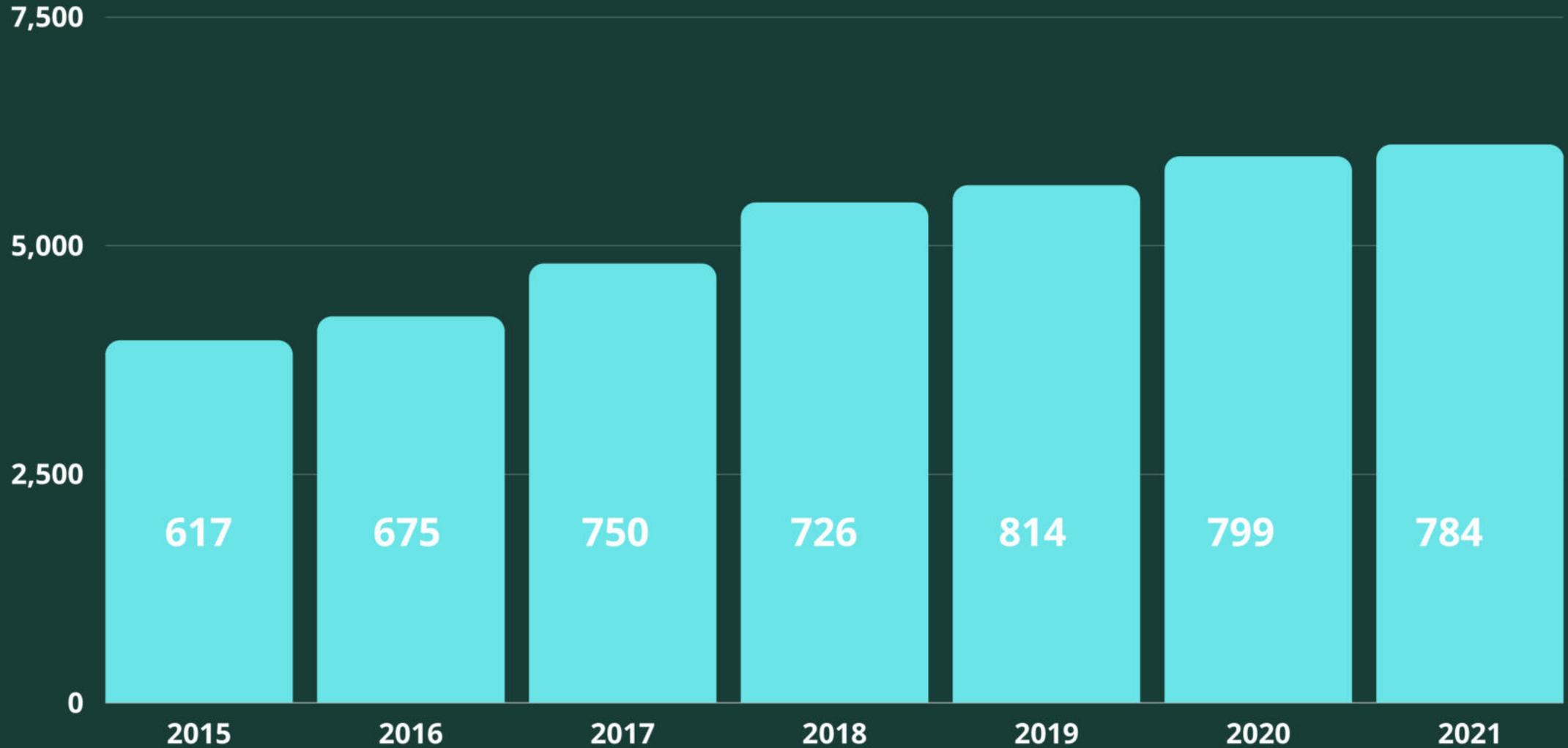


784 Livestock Operators in 2021

15 decertified voluntarily
or mandatorily

-2% decline

Organic Livestock



Quick Facts Available on Shopify

<https://canada-organic.myshopify.com/>

QUICK FACTS ABOUT ORGANIC IN CANADA



SALES
\$9.35*
billion
Canadian's annual spend on organic

Valued at
\$7.236*
billion

80%
of sales are food & beverage (non-alcoholic)

*Estimated using a Compound Annual Growth Rate (CAGR) method

2021 HIGHLIGHTS
130 new farmers joined organic
5% increase across all certified operator categories
37 3,30 new acres are currently transitioning to certified organic

CONSUMER PREFERENCES

On average, Canadians spend **\$184** weekly on organic groceries



Consumers associate the Organic logo with:
0 Non Genetically Engineered (non-GMO),

• Strong Standards

Animal Welfare

(Y) Good for the Environment

Free from Pesticides

(Z) More Tasty/Healthy

23% ↑ of Canadians are buying more organic than a year ago

54% of Canadians say they trust Canada Organic Certified



CERTIFIED OPERATORS

!JM Acres 24th decade since 2020

6.1K Certified Producers since 2015

1.8K Certified Processors since 2015

1.4 Livestock Producers since 2015

7.9K Certified Organic Operations since 2015

Organic Seafood

The Canadian Organic Aquaculture standard came into force Jan 15, 2021. Salmon, mussels, oysters, steelhead, sea bass, rainbow trout are now available as certified organic in Canada.

Organic Producers by Province

2742	949	875	611	595	166	157	7
Quebec	Ontario	Sask.	Alberta	B.C.	Atlantic	Manitoba	Territories

Organic Processors by Province

707	516	322	94	90	56	39	3
Quebec	Ontario	B.C.	Sask.	Alberta	Manitoba	Atlantic	Territories

Organic Livestock by Province

299	269	109	53	24	15	12	3
Ontario	Quebec	B.C.	Alberta	Manitoba	Sask.	Atlantic	Territories

Organic Food Operators by Province

3554	1480	957	898	698	204	197	10
Quebec	Ontario	Sask.	B.C.	Alberta	Manitoba	Atlantic	Territories

DES FAITS EN BREF À PROPOS DU BIOLOGIQUE AU CANADA



VENTES
9,35G \$*
dépensés annuellement par des Canadiens pour des produits biologiques

Évalués à
7,236G \$*

80%
des ventes sont pour de la nourriture et des boissons (non alcooliques)

*Estimé en utilisant un taux de croissance annuel composé (TCAC)

FAITS SAILLANTS, 2021
130 nouveaux fermiers ont transitionné vers le bio
5% d'augmentation de l'ensemble des catégories certifiées
37 330 nouveaux acres en transition vers la certification bio

PRÉFÉRENCES DES CONSOMMATEURS



Les consommateurs associent la marque Biologique Canada aux suivants:

En moyenne, le Canadien peut en acheter **11** produits bios

23% des Canadiens achètent plus de produits bios qu'il y a un an

54% des Canadiens disent qu'ils ne feraient pas la certification bio autrement

Non génétiquement modifié (-on OGM)

Normes 110 bustes

Bien-être animal

Bon pour l'environnement

Exempt de pesticides

Exempt de produits chimiques/santé

The Organic Market in Asia

The growth of the organic sector

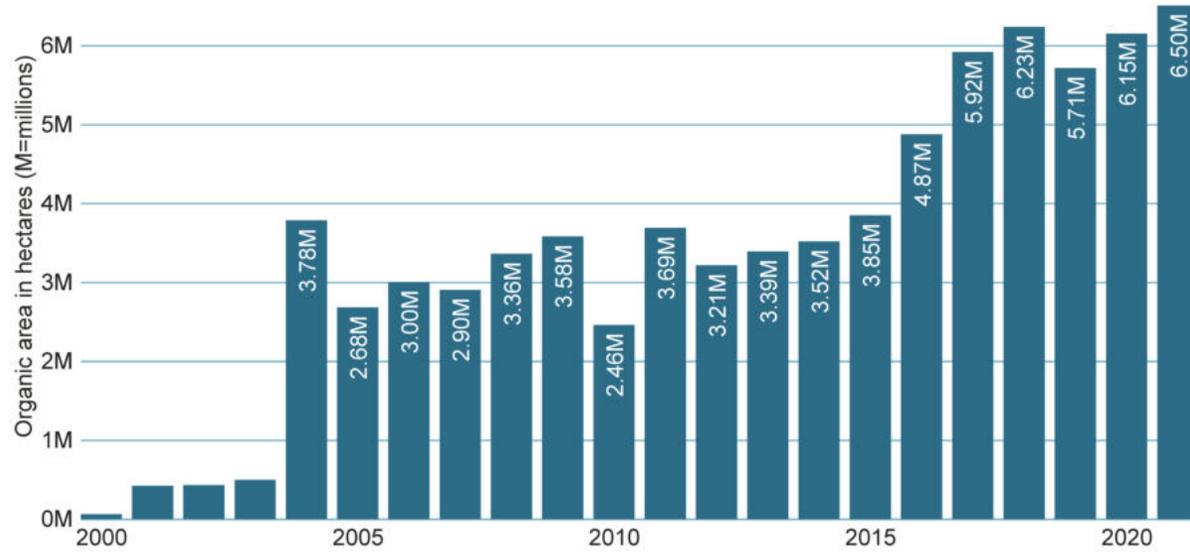
MIYOSHI Satoko
World Board member
IFOAM – Organics International

Asia – Snapshot 2021

- Over **1.7 million organic producers** (1.6 Million in India)
- More than **6.5 million hectares** (9% of global organic land, increased by 356,000 ha)
- **Timor-Leste** is highest organic area share by 8.5%, followed by south Korea and Sri Lanka
- Cereals, oilseeds and textile crops are the key crop
- Export most to EU, lead by India, while domestic market is growing
- Oilcake is the most important export product
- High interest for **PGS**

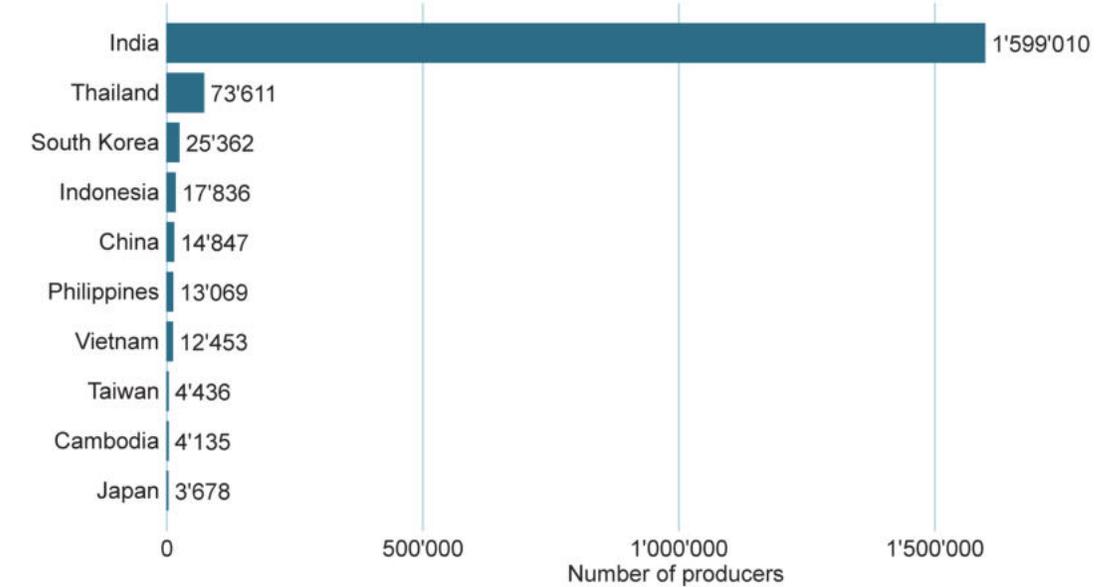
Asia: Development of organic agricultural land 2000 - 2021

Source: FiBL-IFOAM-SOEL surveys 2001-2023



Asia: The ten countries with the largest number of organic producers 2021

Source: FiBL survey 2023

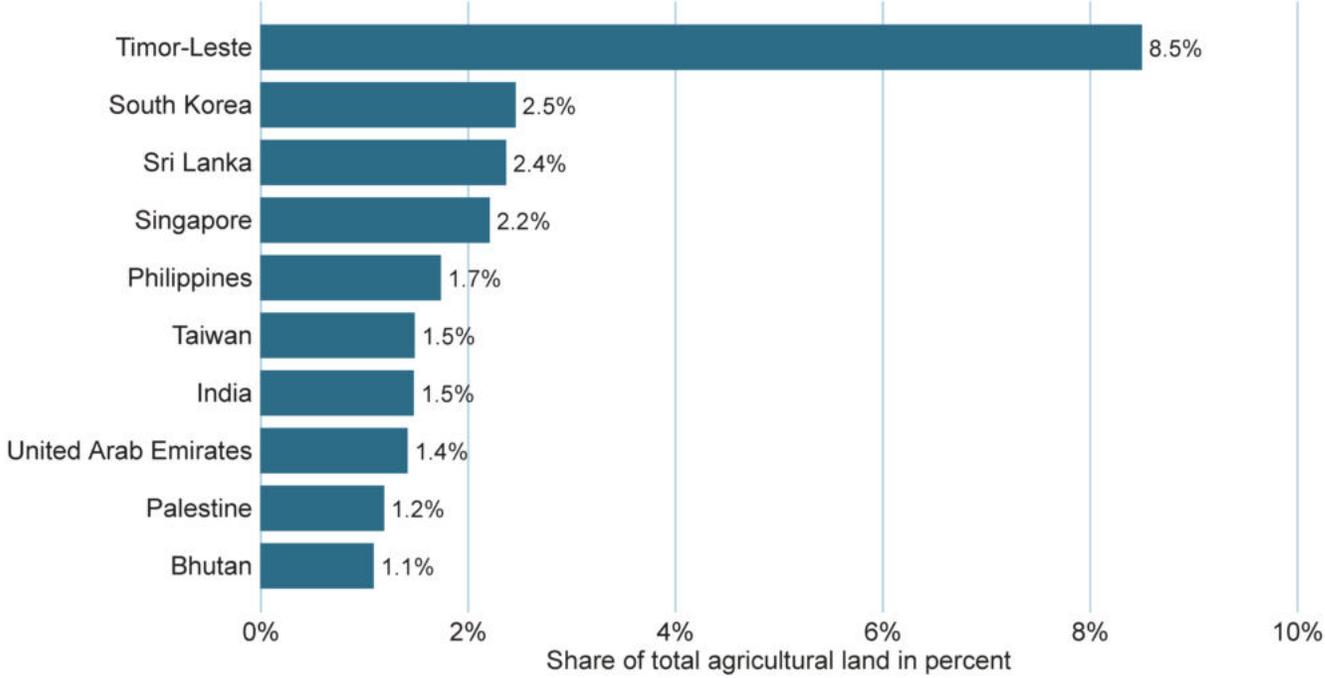


Stable growth in organic land.
Most of producers are in India.

Timor-Leste is leading the highest organic share by 8.5%, South Korea and Sri Lanka about 2.5%

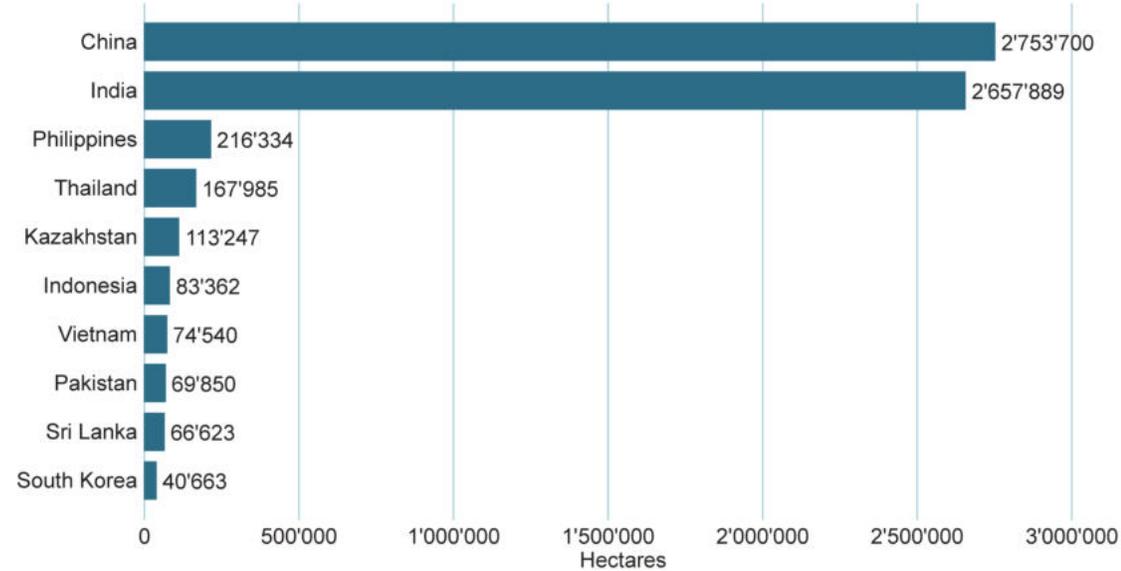
Asia: The ten countries with the highest organic share of total agricultural land 2021

Source: FiBL survey 2023



Asia: The ten countries with the largest organic agricultural area 2021

Source: FiBL survey 2023



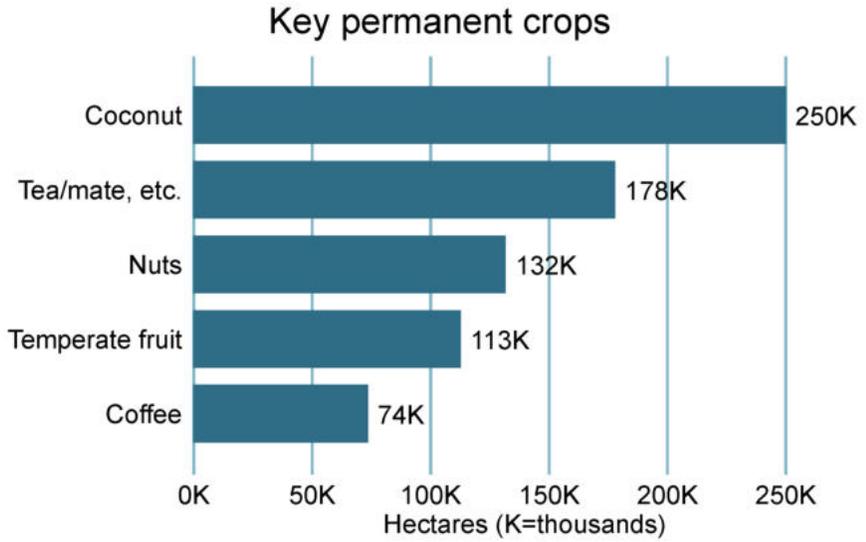
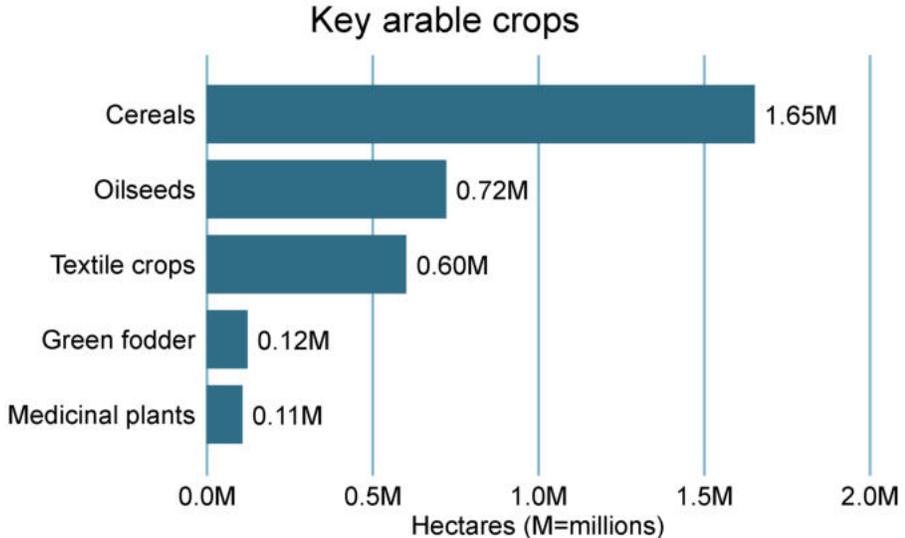
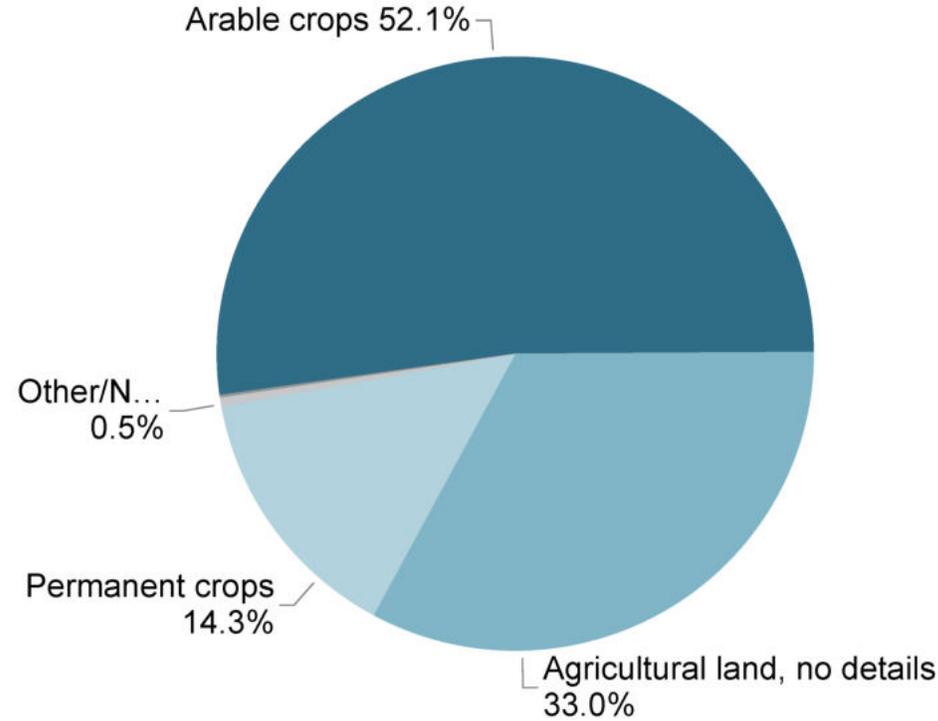
China and India covers large area of organic agriculture

Asia: Use of organic agricultural land 2021

Source: FiBL survey 2023



Land use types



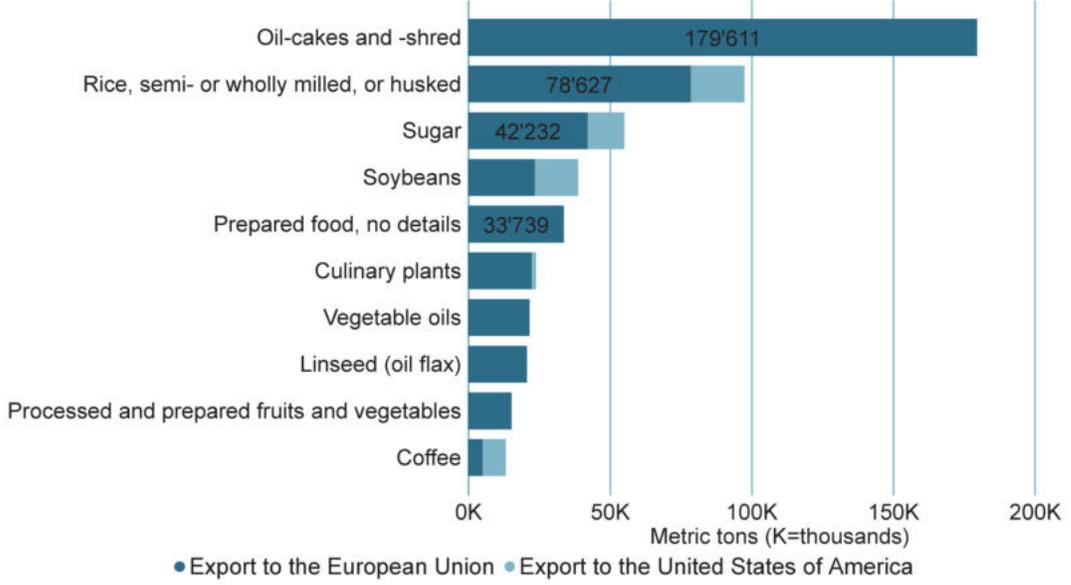
More than 50% of organic land used for Arable crops. Cereals are the top followed by oilseeds and textile crops.



Source: FiBL survey 2023

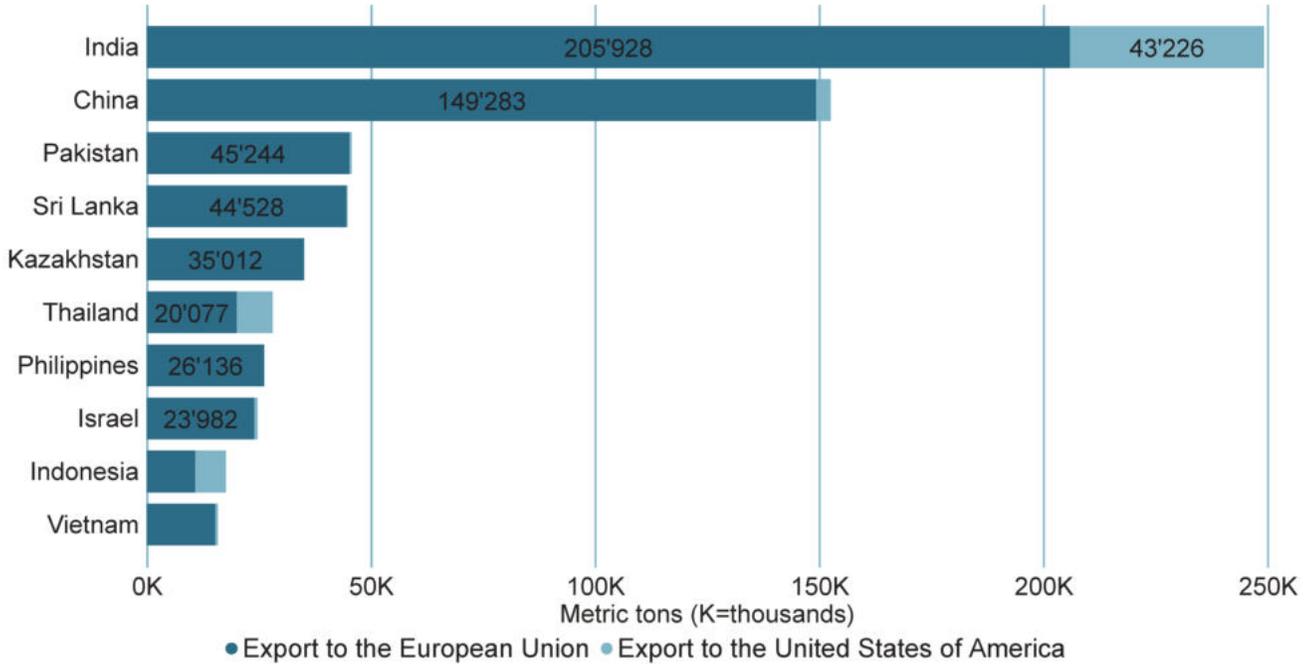
Asia: Key commodity groups exported to the EU and US in 2021

Source: Traces/European Commission 2022, GATS/USDA 2022



Asia: Key EU and US export countries in 2021

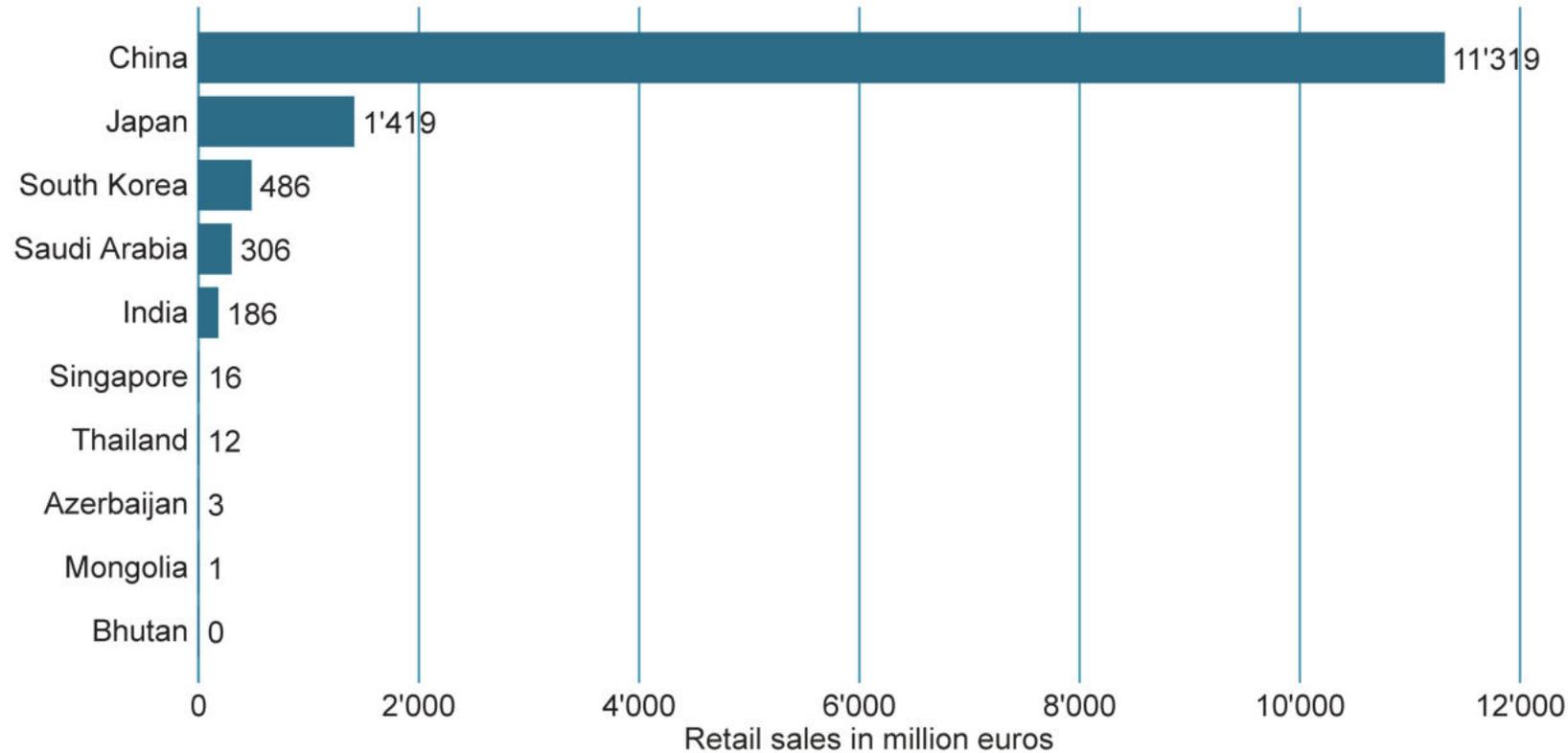
Source: Traces/European Commission 2022, GATS/USDA 2022



EU is the biggest partner for exporting from Asia.
 India export most while their local demand is increasing.

Asia: The countries with the highest organic retail sales in 2021

Source: FiBL-AMI survey 2023



China leads the region. Followed by Japan and South Korea.

Raising domestic market in many countries.

Insight of Japanese market

More Choice of stores

Organic Cosmetic leading its sector



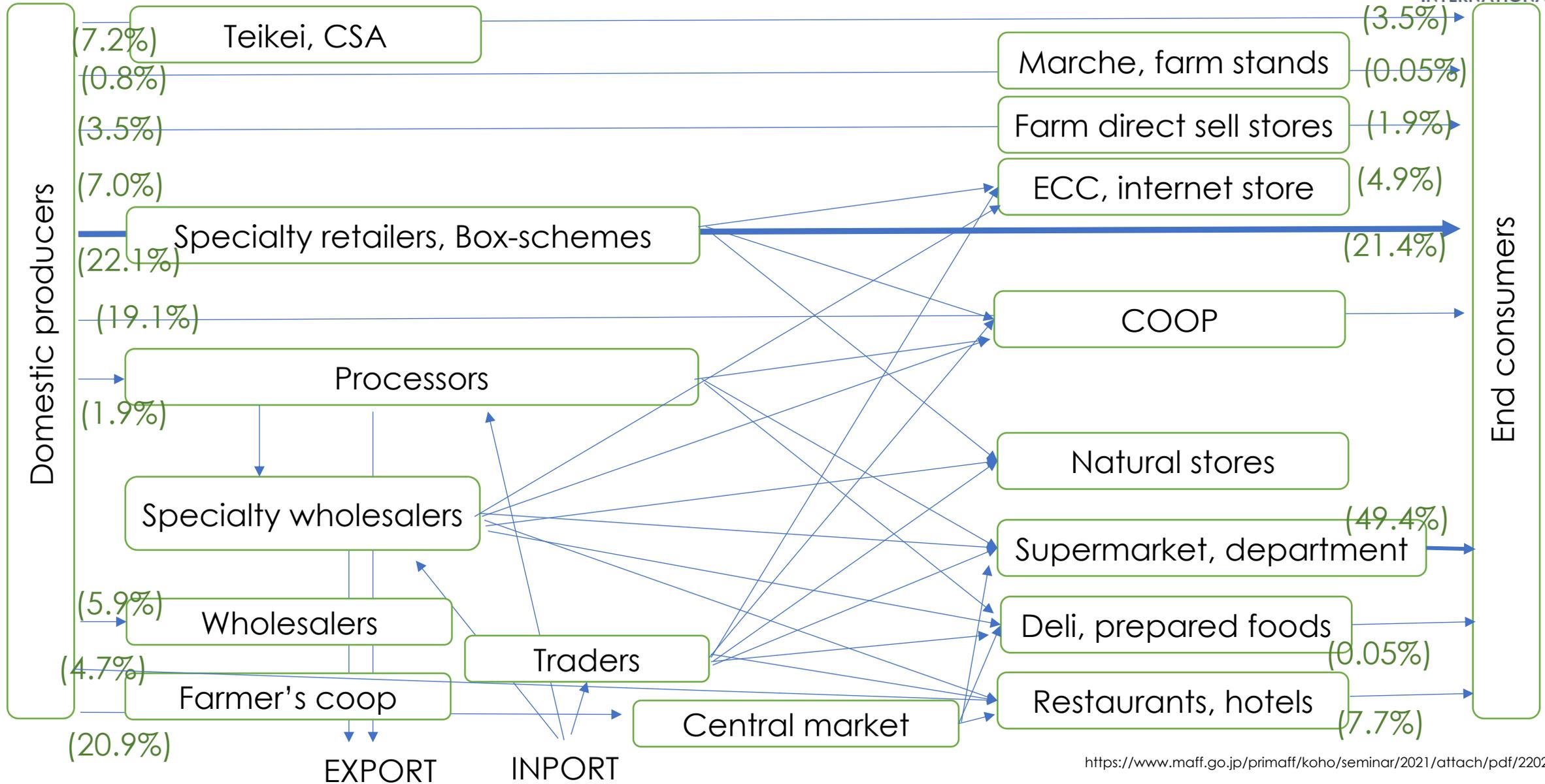
Lifestyle driven market



8 bil yen sale retailer



Insight of Japanese market: distribution channel



Total 203Bil Yen

The Organic Market in Latin America

The resilience of the organic sector

Julia Lernoud
Vice president
IFOAM – Organics International



Latin America and Caribbean – Snapshot 2021

- Nearly **300'000 organic producers**, nearly 20'000 more organic producers than in 2020
- Nearly **9.9 million hectares** (13% of global organic land but only 1.4% of the agri land in the region, 1.6% in 2020). Unfortunately, the agricultural land has decreased by nearly 70'000 ha
- **Argentina** (4 million hectares) and **Uruguay** (2.7 million hectares) - **Mainly grassland**
 - However, **temperate fruits** represent a big share of the organic exports of these countries
- Uruguay had the highest **organic share 19.6%**, 7th in the world
- Bananas, sugar and coffee are most exported organic products
- **Nineteen countries** in the region have **legislation on organic agriculture**, and two countries are drafting such legislation.

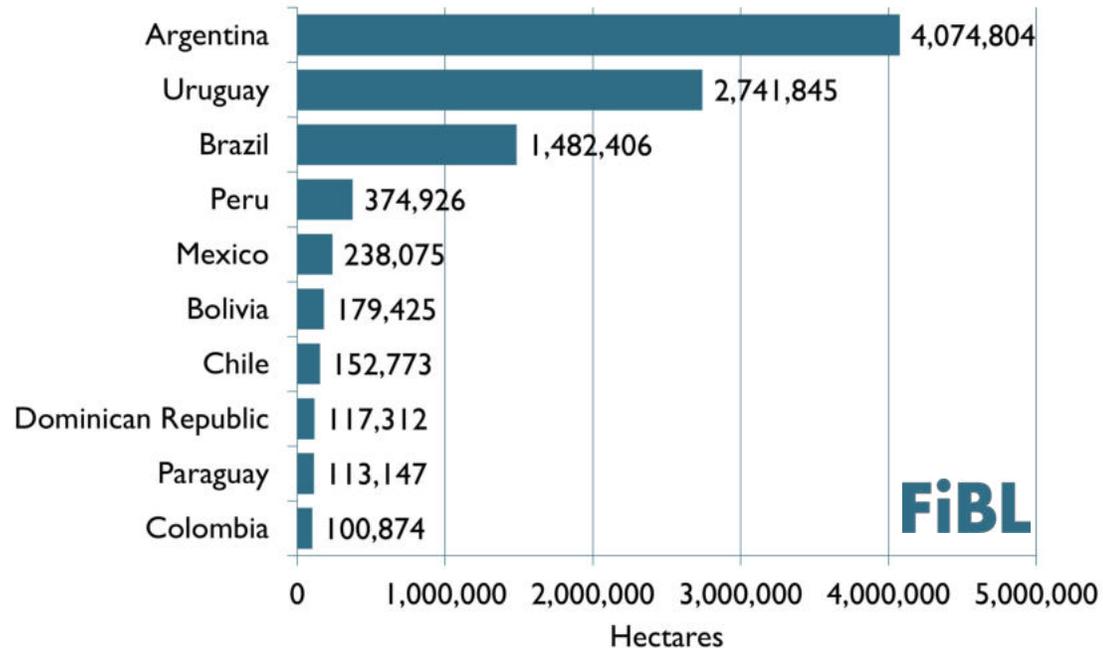
There is still a **lot of growth potential** in the region.

Industrial agriculture has a big lobby power in Latin America

Some countries are **big players** in the global organic trade

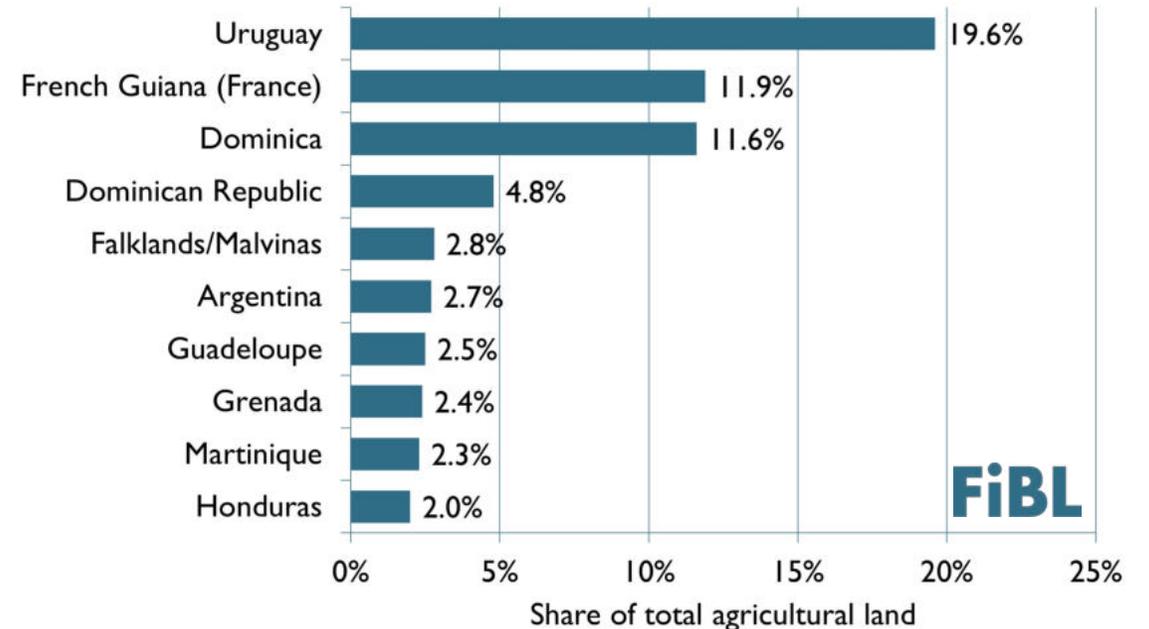
Latin America and Caribbean: The ten countries with the largest organic area 2021

Source: FiBL survey 2023



Latin America and Caribbean: The countries with the highest organic share of total agricultural land 2021

Source: FiBL survey 2023



Source: FiBL survey 2023

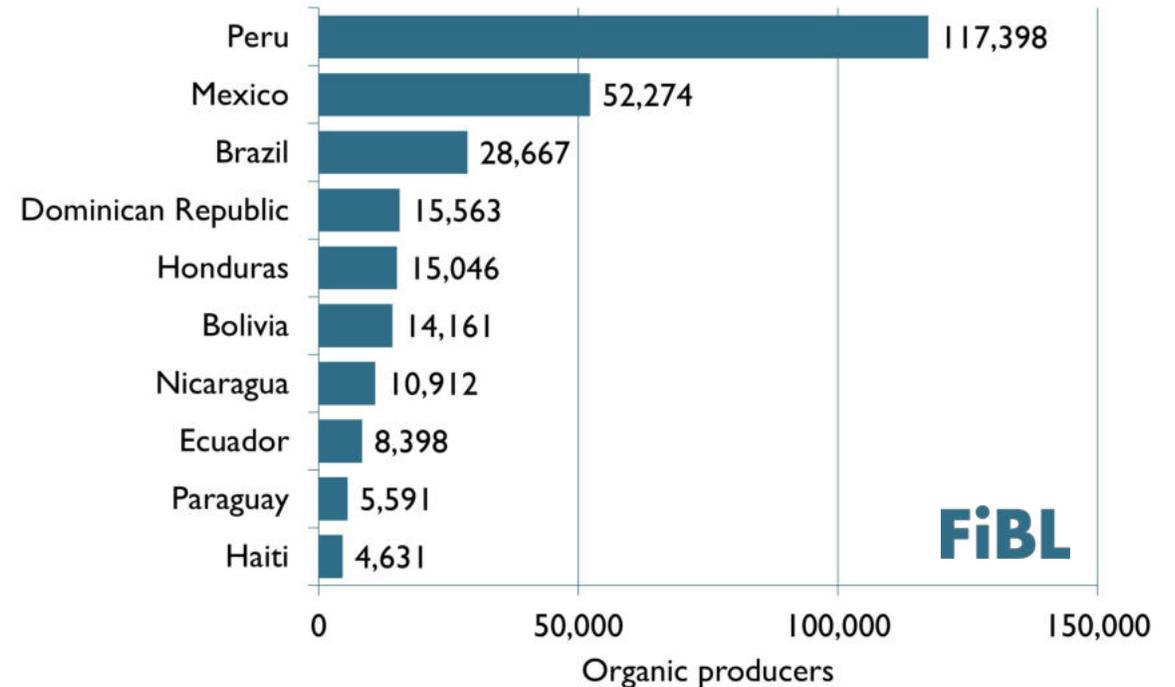
The **organic area growth** has been quite stable over the year – some ups and downs mainly due to Argentina's grassland

Peru continues to have the largest number of organic producers in Latin America and 5th worldwide!



Latin America and Caribbean: The ten countries with the largest number of organic producers 2021

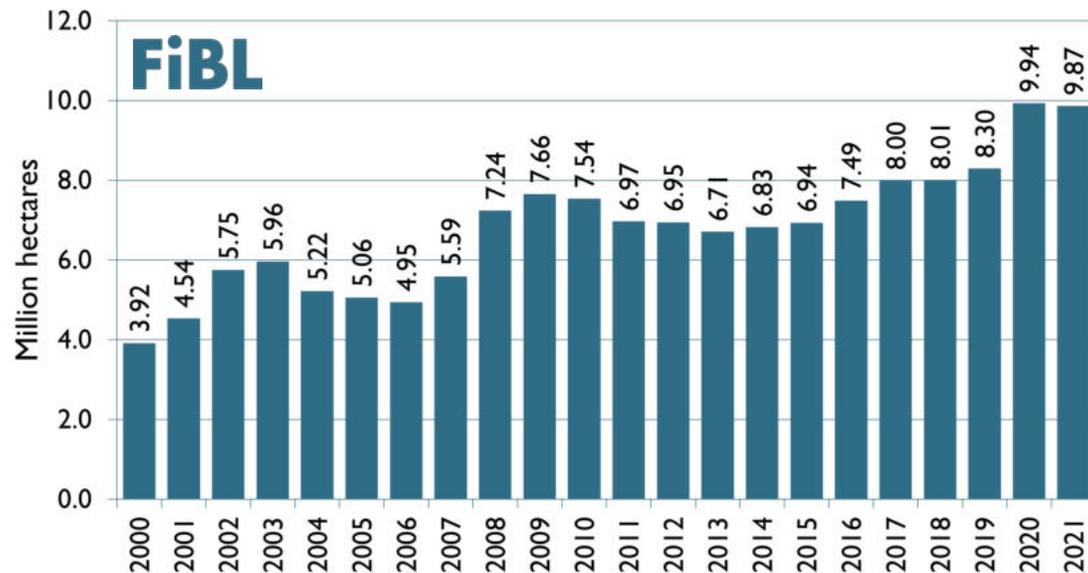
Source: FiBL survey 2023



Source: FiBL survey 2023

Latin America and Caribbean: Development of organic agricultural land 2000 to 2021

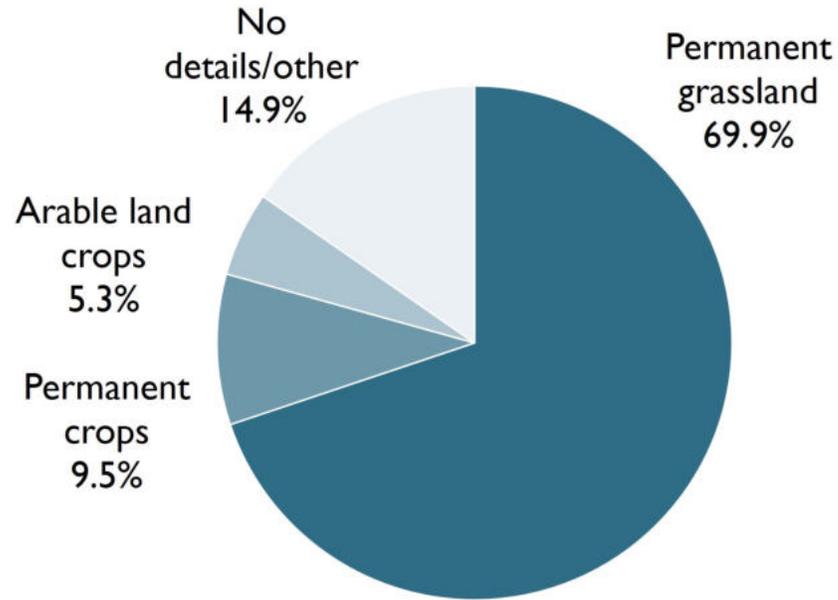
Source: FiBL-IFOAM-SOEL-Surveys 2002-2023



Latin America and Caribbean: Use of organic agricultural land 2021

Source: FiBL survey 2023; based on information from the private sector, certifiers, and governments.

Land use types 2017

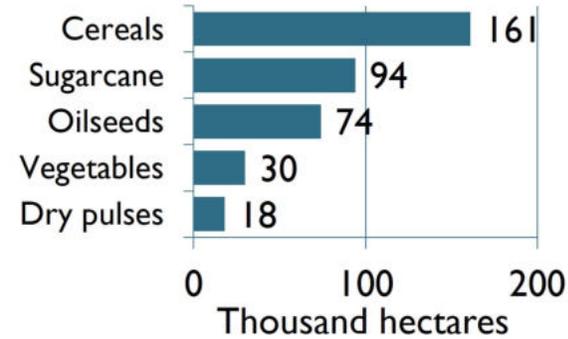


FiBL

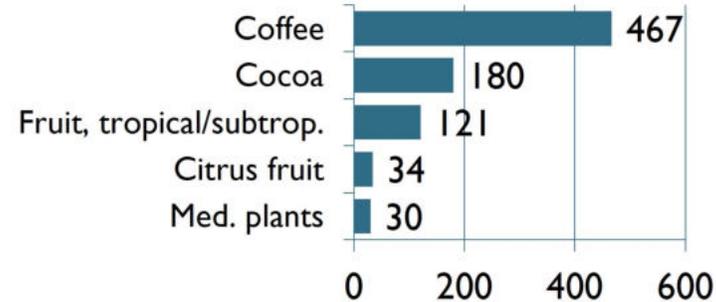
Source: FiBL survey 2023



Key arable crops



Key permanent crops



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

Coffee as well as cocoa and tropical fruits are still the main crop group - Most of it is for export. However, **the regional demand for these crops is increasing**

A growing market with many opportunities!



- **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
- **Looking for partners in the region**
 - MoU between **Brazil and Chile** (2018) → Includes PGS
- **COVID effects**
 - Big **increase in demand of organic products** in the big cities
 - and continues to grow!
 - Organic sector resilience and adaptability
 - **Fast response** to the new and challenging situation
- **Political and social instability** in the region
 - all stakeholders need our **support**



TODO ORGANICO
DEL HUERTO A TU MESA - NATURAL Y FRESCO

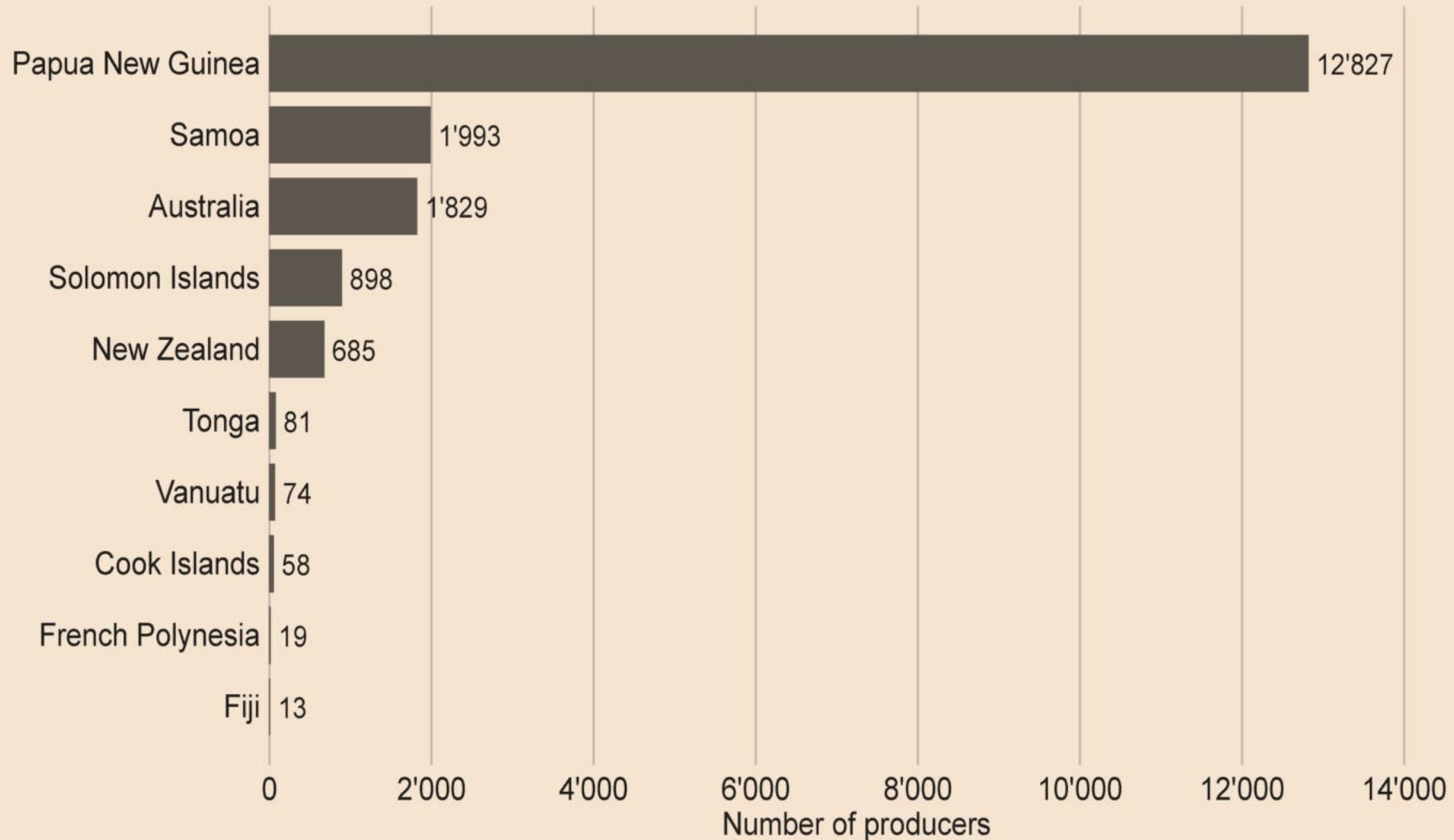




American Samoa, Australia, Cook Islands, Federated States of Micronesia, Fiji, French Polynesia, Guam, Kiribati, Marshall Islands, Nauru, New Caledonia, New Zealand, Niue, Northern Mariana Islands, Palau, Papua New Guinea, Pitcairn Islands, Samoa, Solomon Islands, Tokelau, Tonga, Tuvalu, Vanuatu, and Wallis and Futuna.

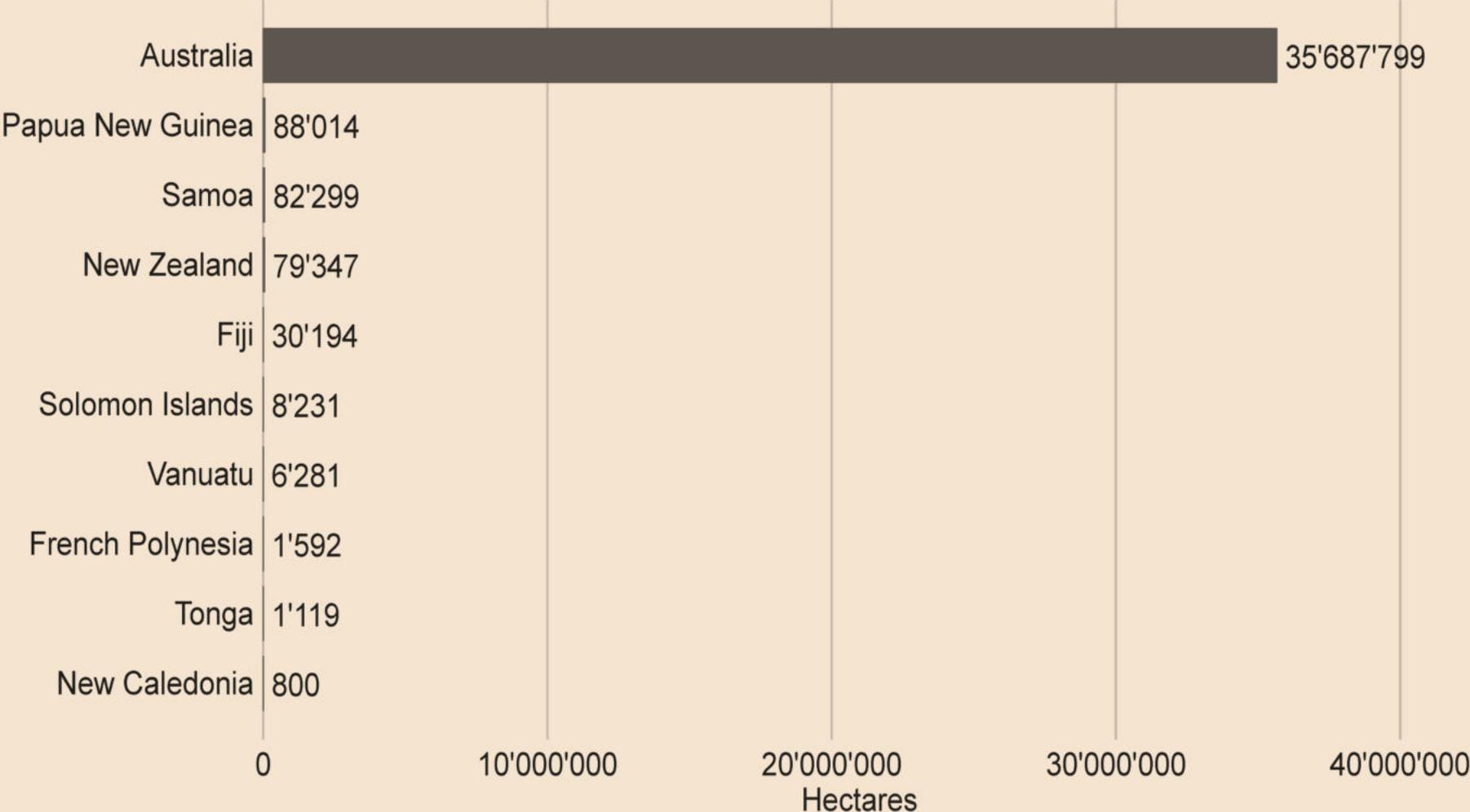
Oceania: The ten countries with the largest number of organic producers 2021

Source: FiBL survey 2023



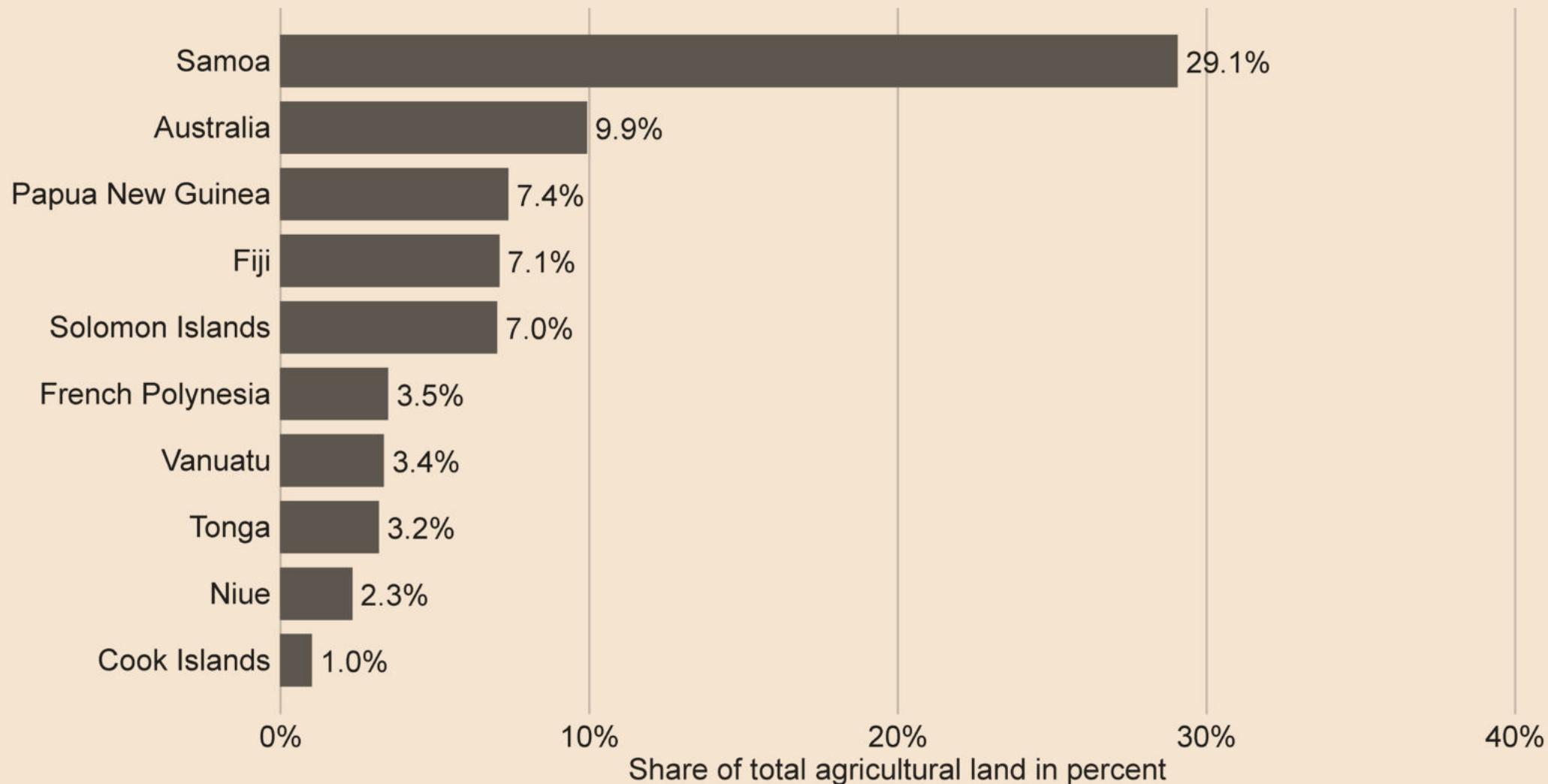
Oceania: The ten countries with the largest organic agricultural area 2021

Source: FiBL survey 2023



Oceania: The ten countries with the highest organic share of total agricultural land 2021

Source: FiBL survey 2023



Australia

2022 Market Report published by Australian Organic



58%

of food shoppers bought an organic product in the prior 12 months, up from 56% in 2021.

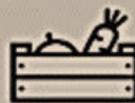


24%

of Australian shoppers indicate quality a roadblock in 2022, reduced from 46% in 2010.



When shoppers were introduced to the meaning of 'having a certification logo', 67% agree that an organic certification mark can enhance the level of trust in products.



90/100

Australian shoppers believe there should be legislated standards for organic practices.



63%

of shoppers recognise the Australian Certified Organic Bud certification logo.



40%

of food shoppers indicated that they would avoid purchasing an organic product if it did not display a certification mark.



1/5

Australian food shoppers say they have a high level of trust when it comes to purchasing organic product.



1/3

of those who have bought an organic product in the past year believe that they have been previously misled by 'organic' claims made on product packaging.



72%

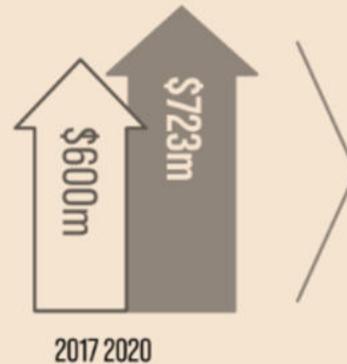
of shoppers who typically spend 50% or more of their food budget on organic have a high level of trust.

New Zealand

2020-21 Market Report conducted by Organic Aotearoa New Zealand

Key Changes 2017-2020

\$723 million value for New Zealand organic sector, compared to \$600 million in 2017.
20% increase, or \$123 million,
with an average growth rate of
6.4% per annum



58% of the organic sector output is exported and 42% is consumed locally



Organic dairy is now the largest organic sector, with exports of \$153.8 million Up 55% from 2017



Fruit and vegetables are #2 at \$143 million Up 6% from 2017



The wine sector is #3 at \$65 million Up 40% from 2017



Organic purchases through supermarkets represent 69% of all organic sales, an increase of 13.8%

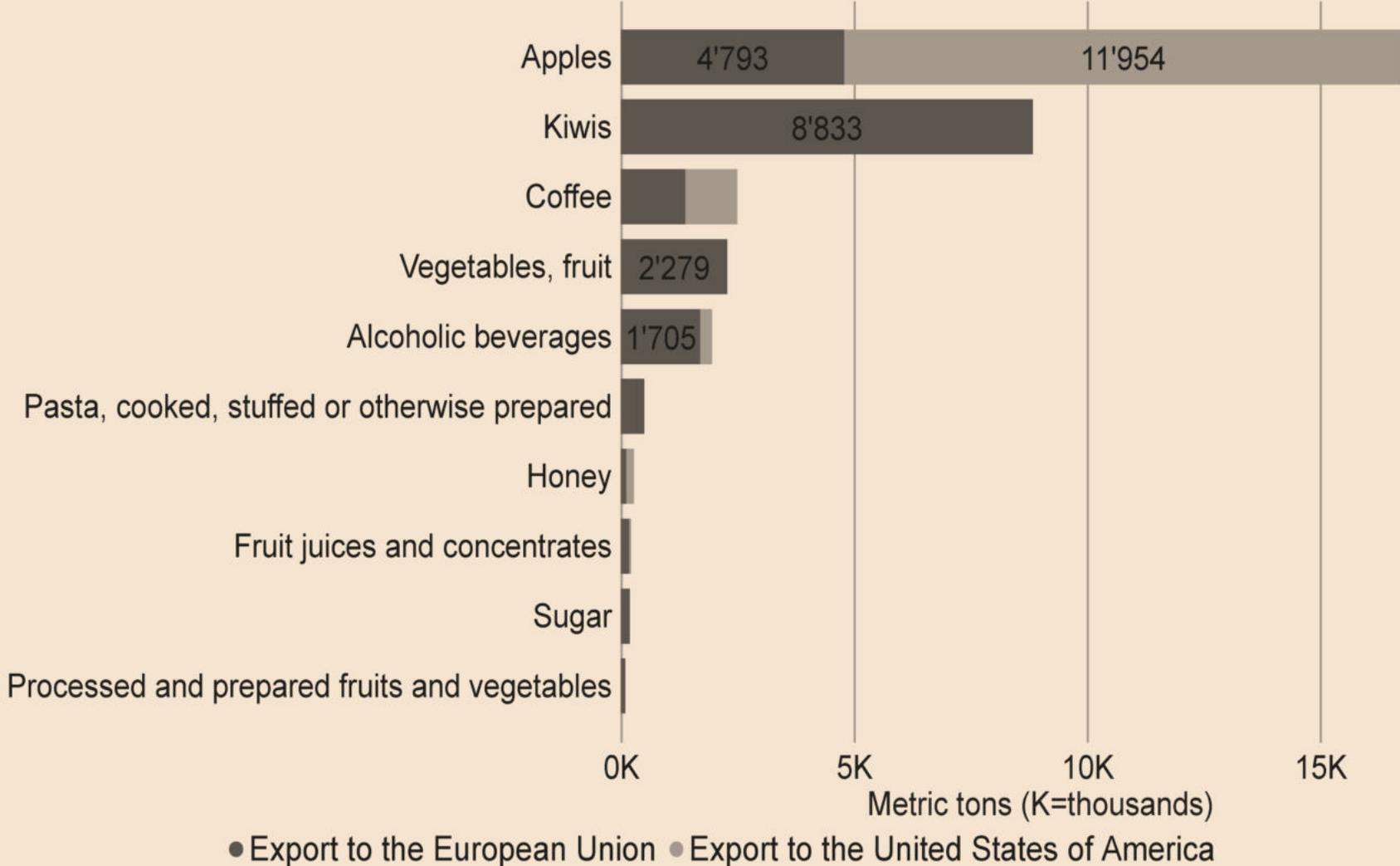
Pacific Islands

- No mechanism for collecting local market data
- PGS is predominant
- Export to Australia, NZ, EU, US, Asian markets growing
- Farmers markets and basket schemes developing
- Tourism and hospitality an opportunity

Products	Countries
Vanilla, ginger & other spices	Fiji, Vanuatu, Niue, Samoa
Cocoa	Vanuatu, Samoa, PNG
Virgin Coconut Oil	Samoa, Fiji, Solomon Islands
Coconut meal	Vanuatu
Nonu /noni (Morinda Citrifolia)	Cook Islands, Samoa, Fiji, Niue, French Polynesia
Honey	Niue
Bananas	Fiji, PNG, Samoa
Coffee	PNG, Samoa
Livestock(Beef, Goats and Sheep)	Vanuatu, Fiji
Fruit & Vegetables	Fiji, New Caledonia, Samoa, French Polynesia
Forest nuts	Solomon Islands

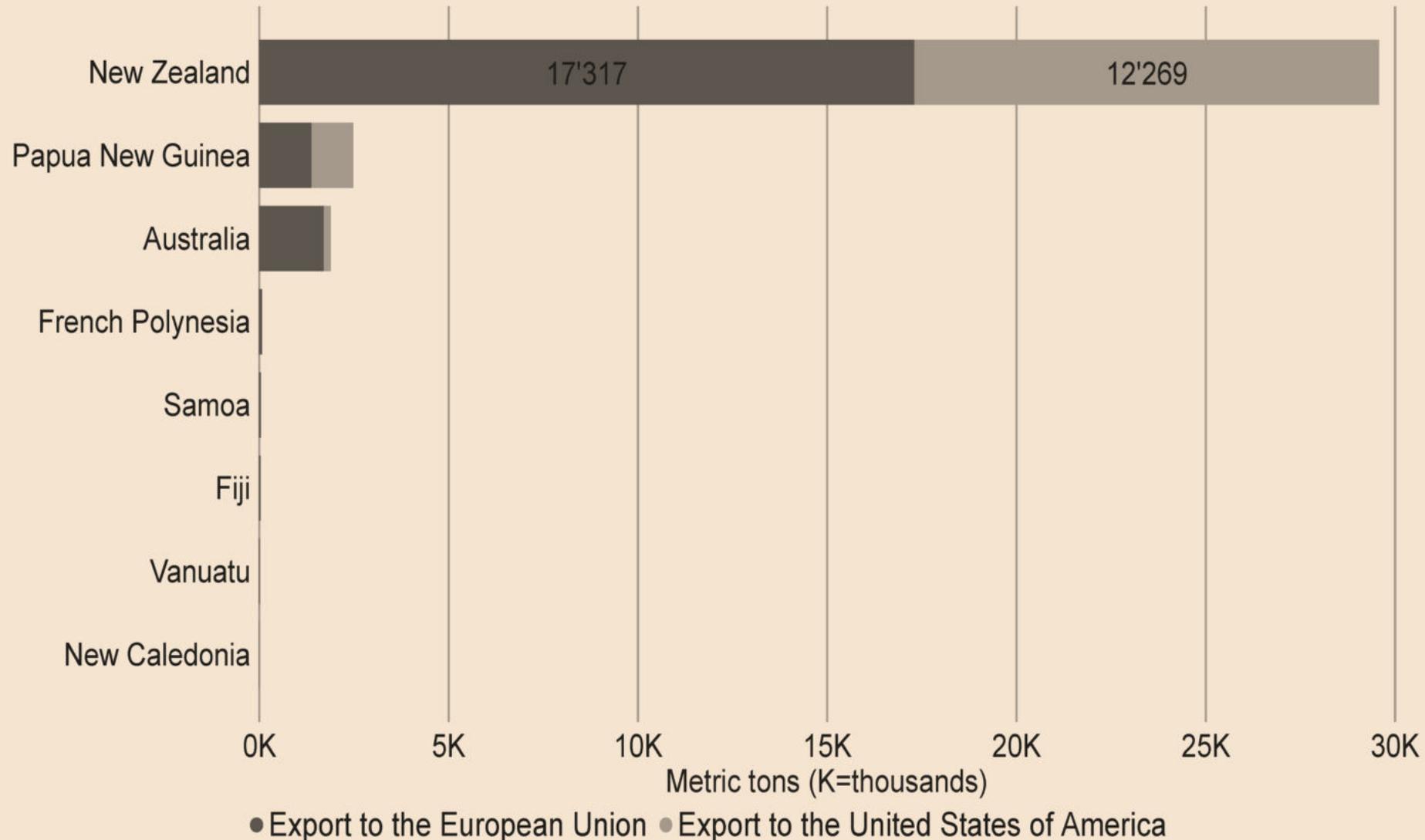
Oceania: Key commodity groups exported to the EU and US in 2021

Source: Traces/European Commission 2022, GATS/USDA 2022



Oceania: Key EU and US export countries in 2021

Source: Traces/European Commission 2022, GATS/USDA 2022





Thank you