



The organic market

Lucius Tamm & Helga Willer (lucius.tamm@fibl.org)
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Content

- Trends in the organic market world-wide
- Bottlenecks related to crop protection
- Market opportunities for the biocontrol industry

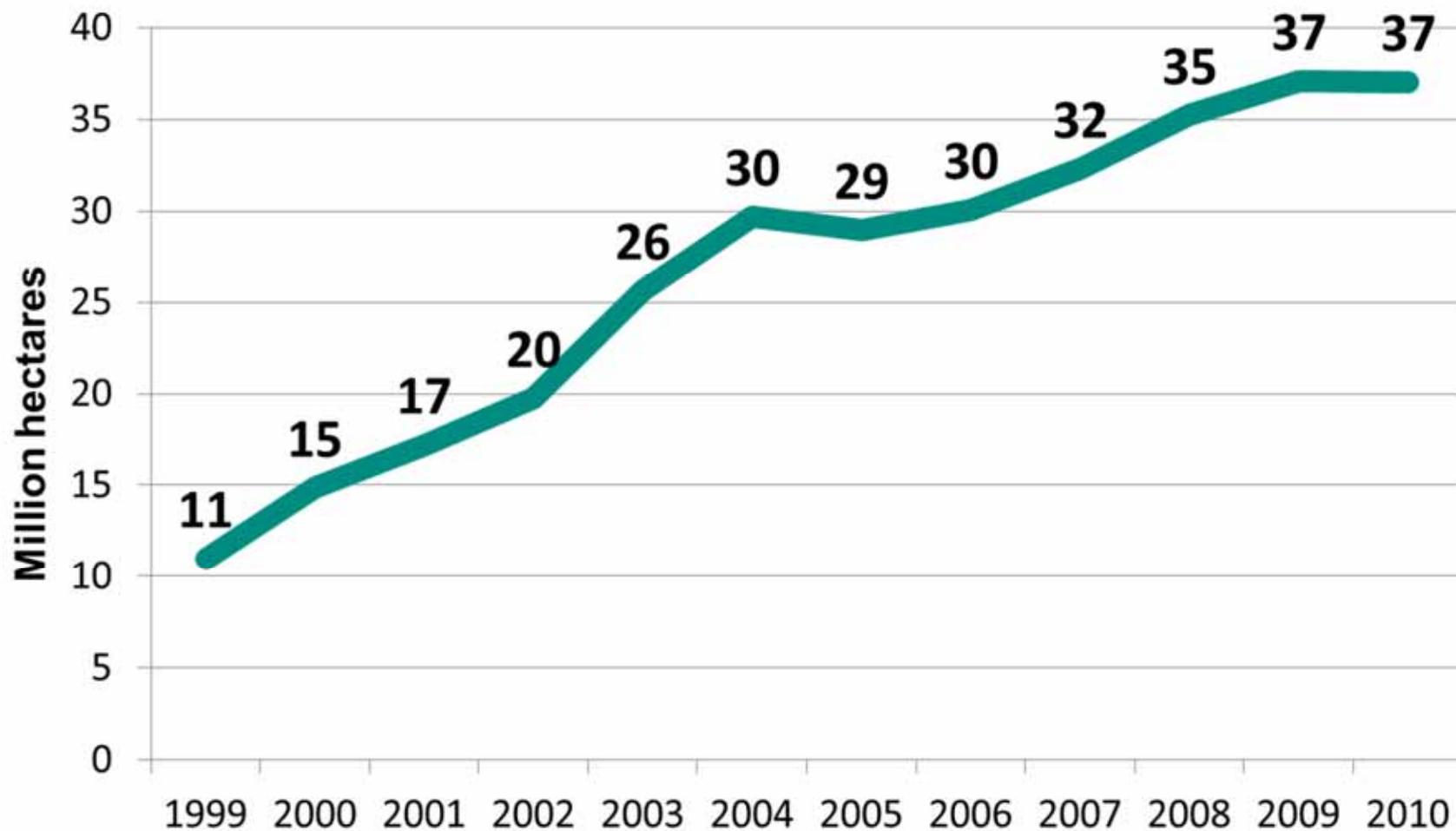
Organic agriculture is based on:

- **The principle of health**
- **The principle of ecology**
- **The principle of fairness**
- **The principle of care**

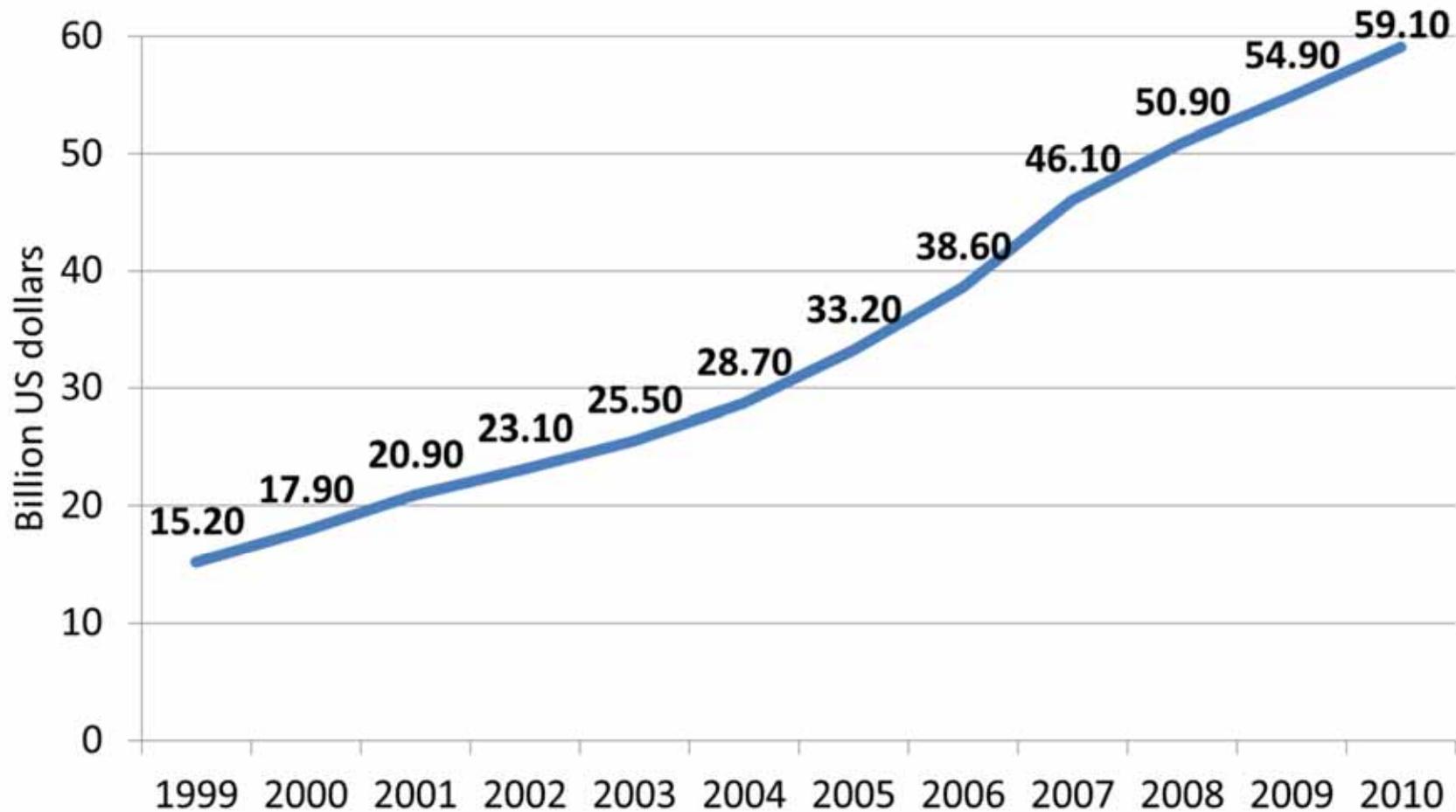
Source: IFOAM standards

- **Standards of organic agriculture are extremely well harmonized world-wide at all levels**
- **Consumers of organic produce are willing to pay a premium**

World: Development of organic agricultural land 1999-2010



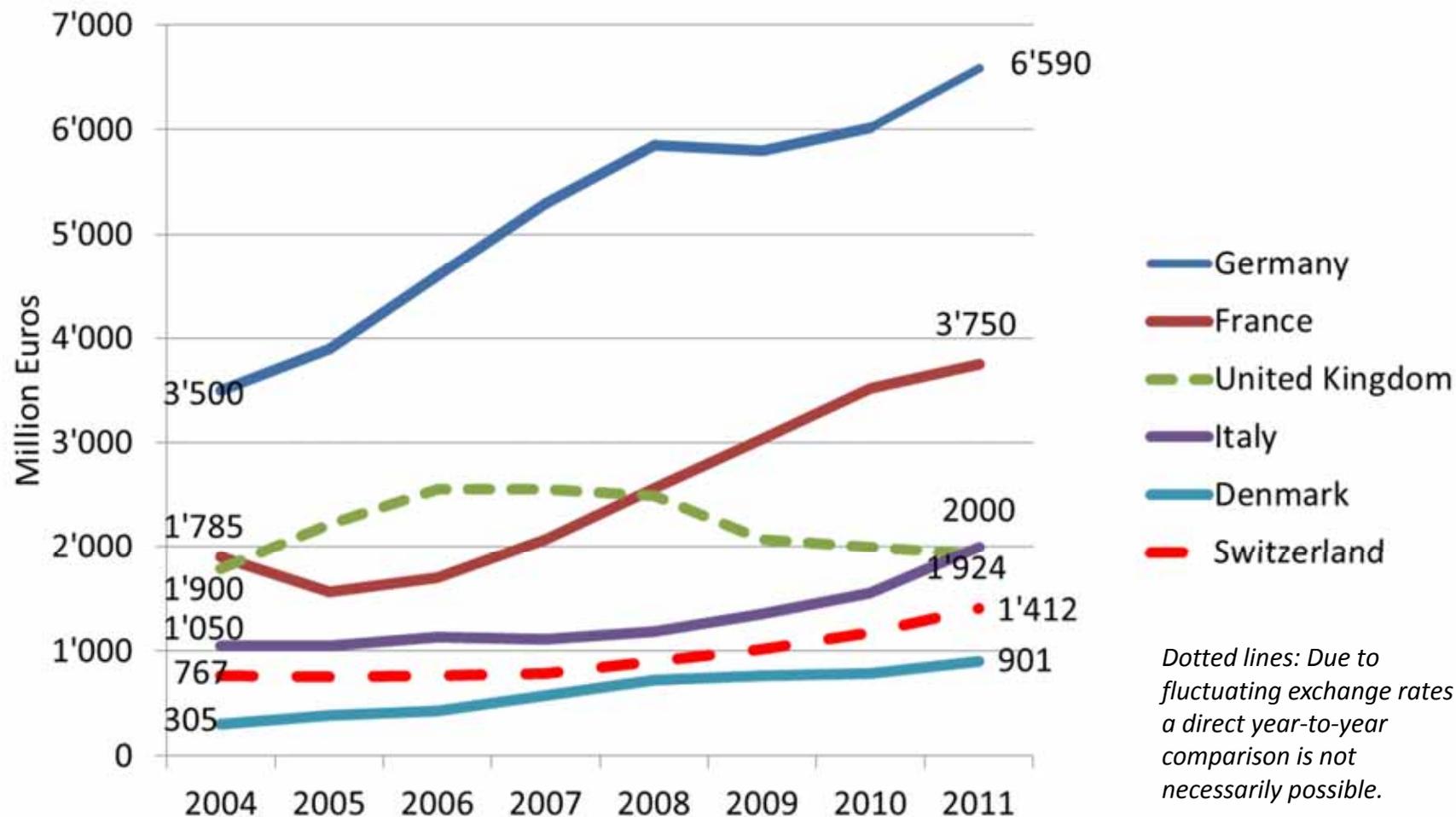
Development of the global market for organic food 1999-2010



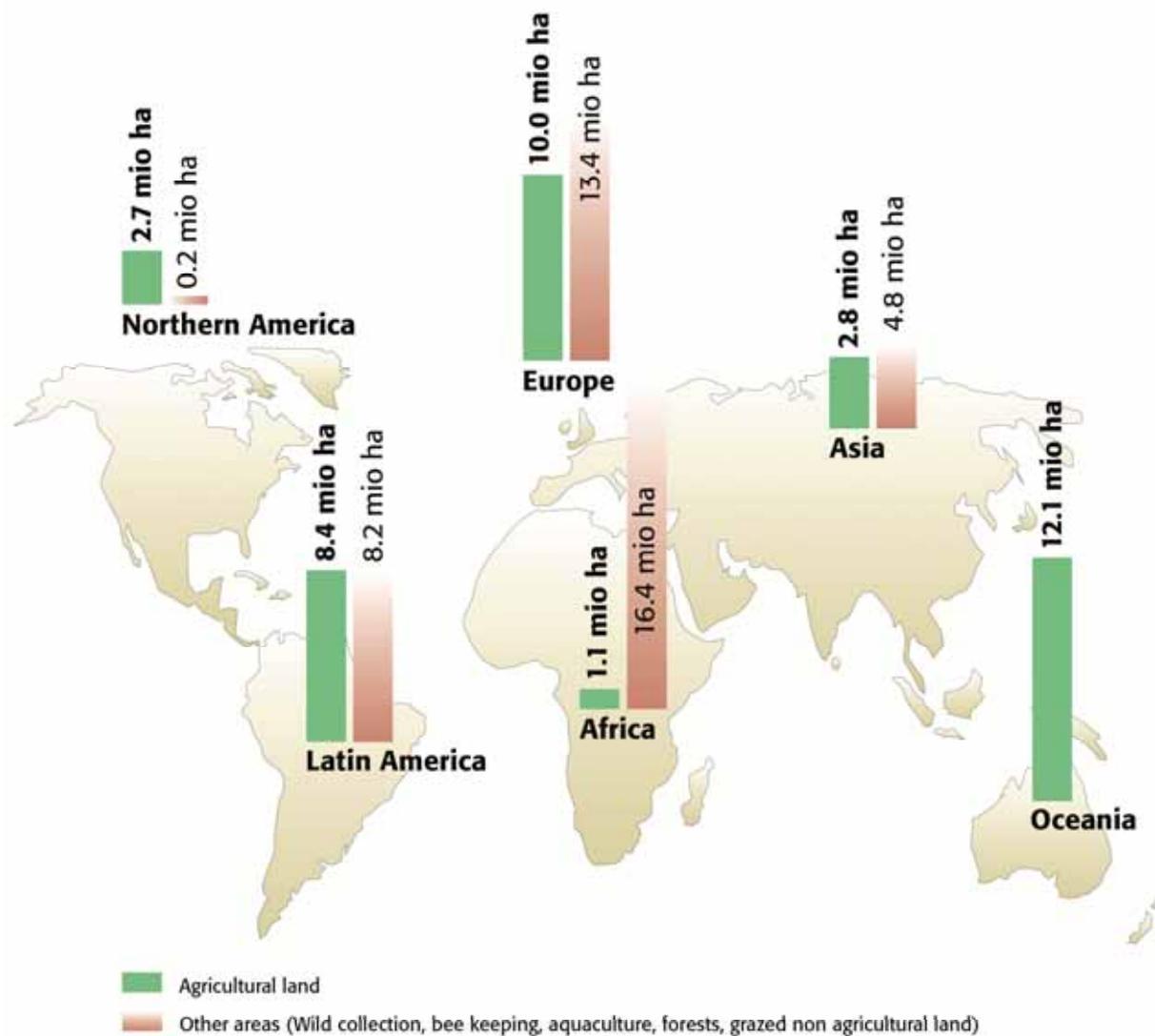
Source: Organic Monitor, various years

Development of the organic market in selected European countries 2004-2010/2011

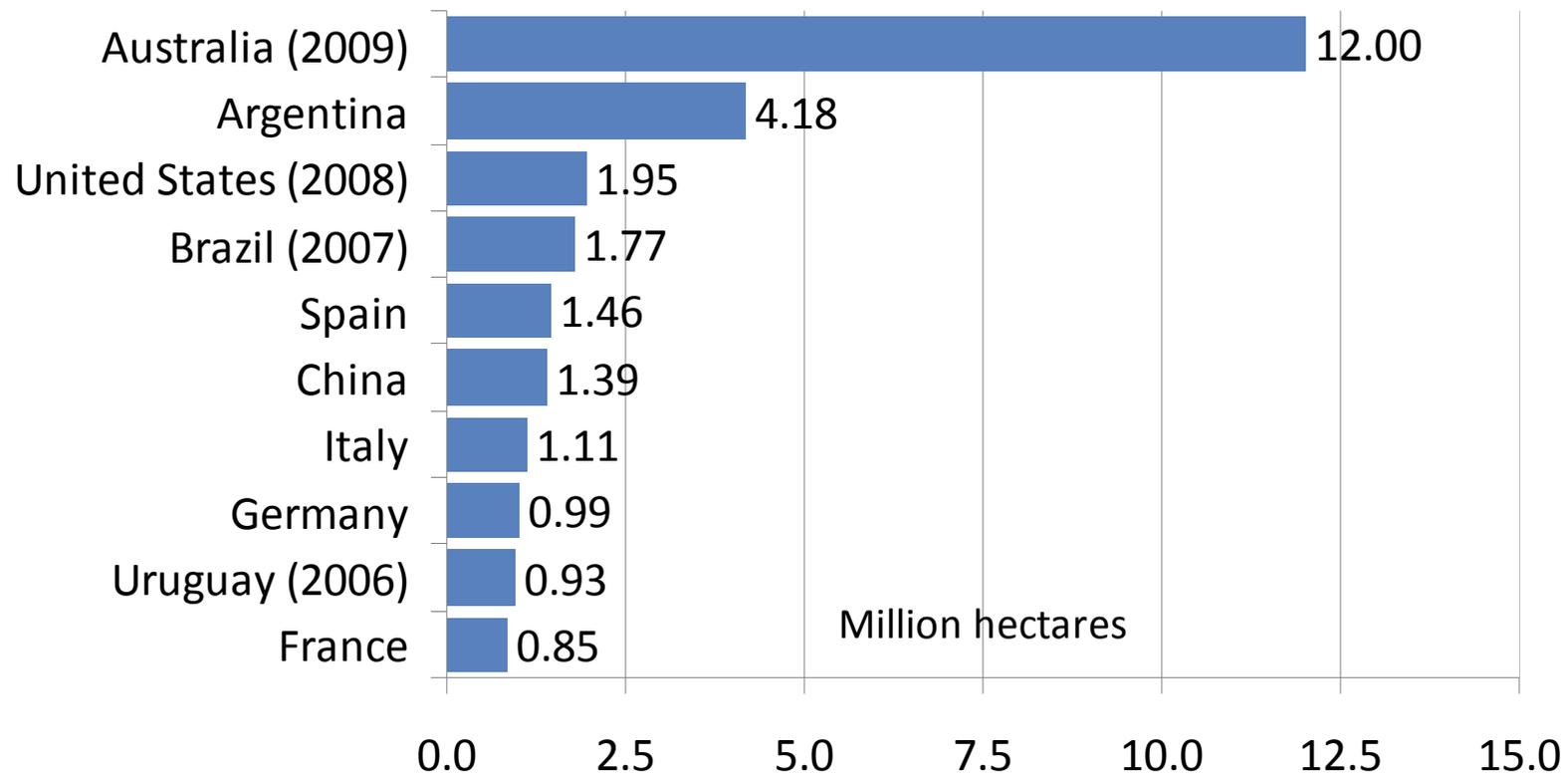
Last Update: September 8, 2012



Organic agricultural land and other organic areas 2010

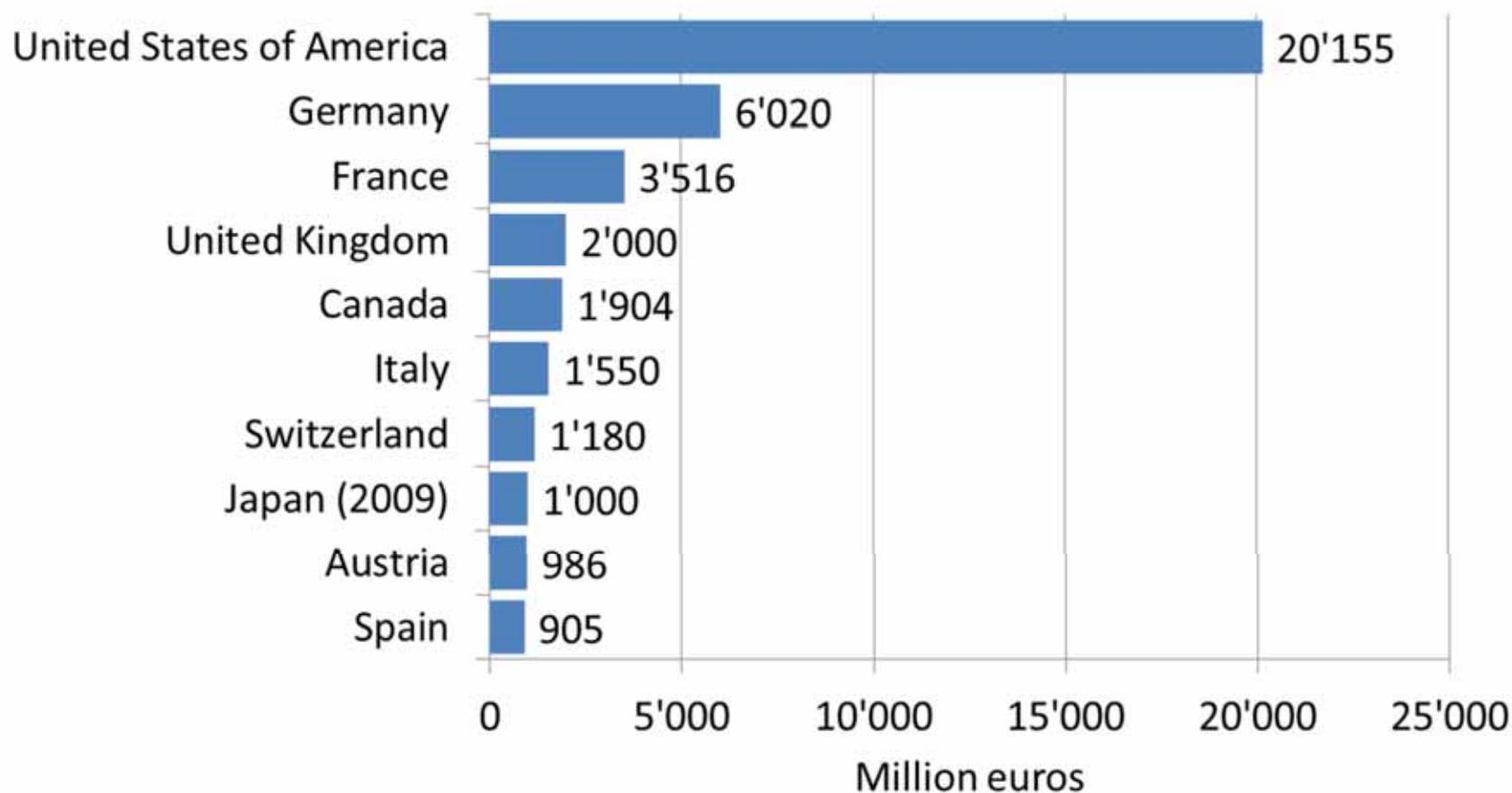


World: The ten countries with the most organic agricultural land 2010

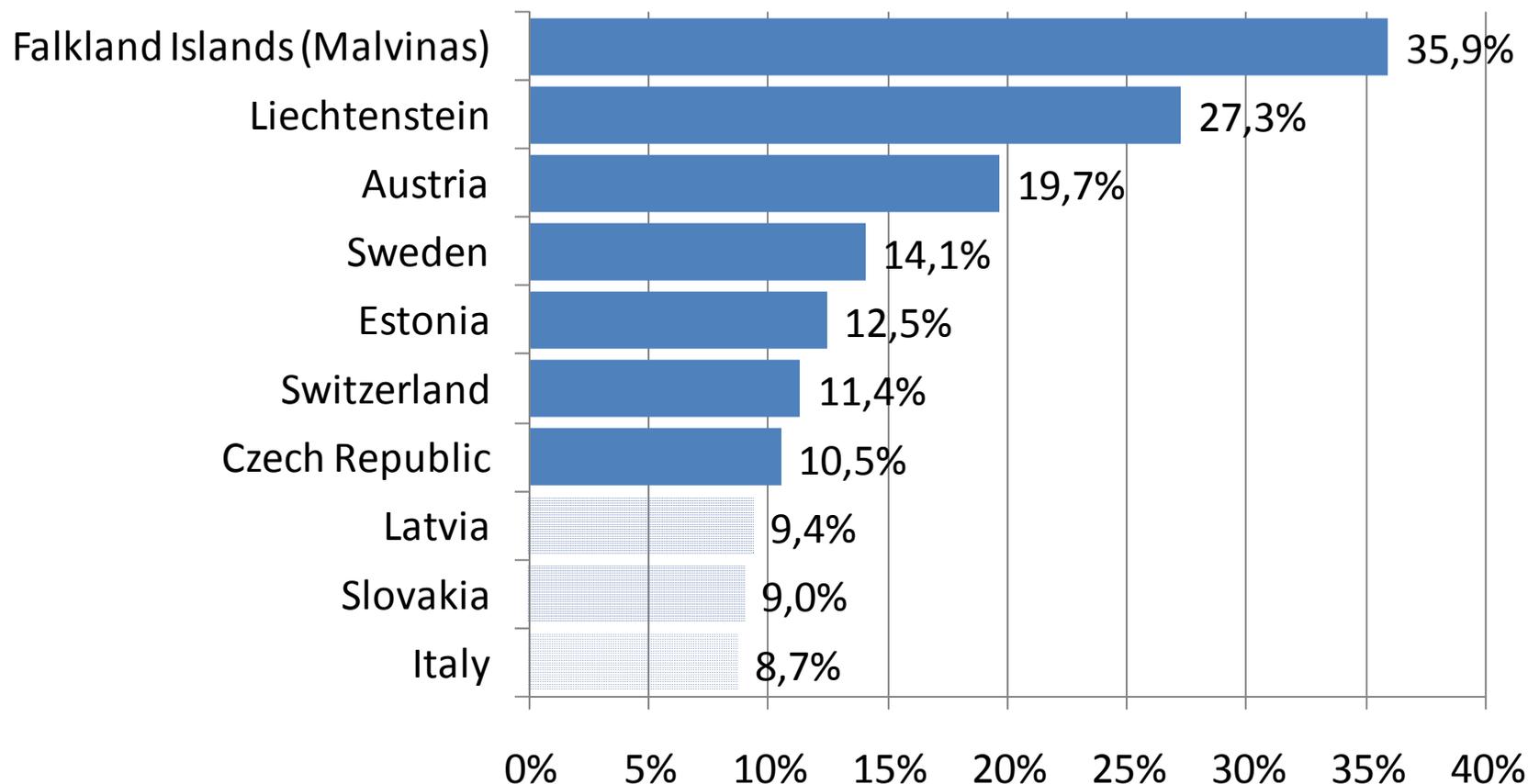


The countries with the largest domestic markets for organic food 2010 (total 44.5 billion Euros)

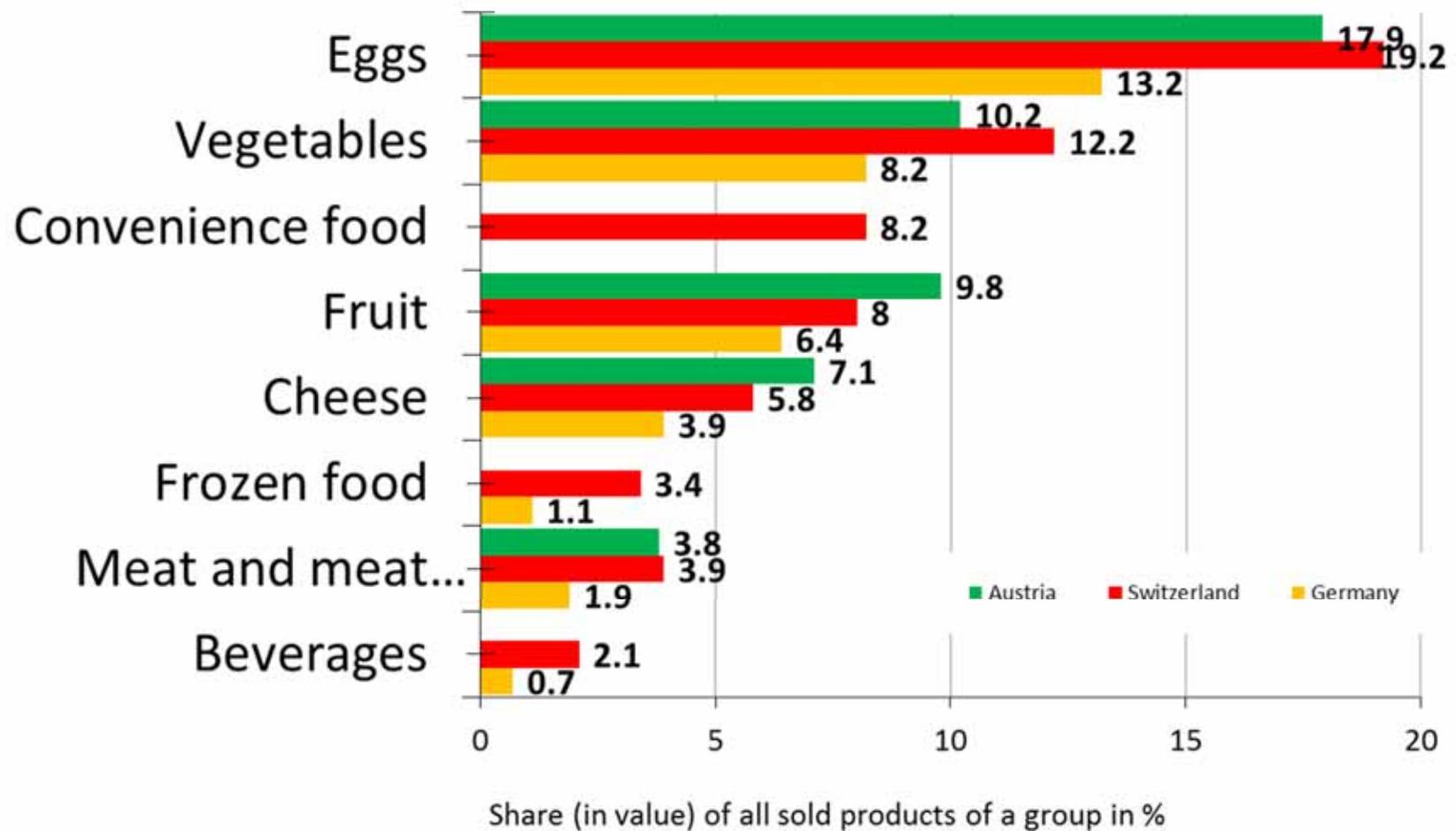
Last update: June 22, 2012



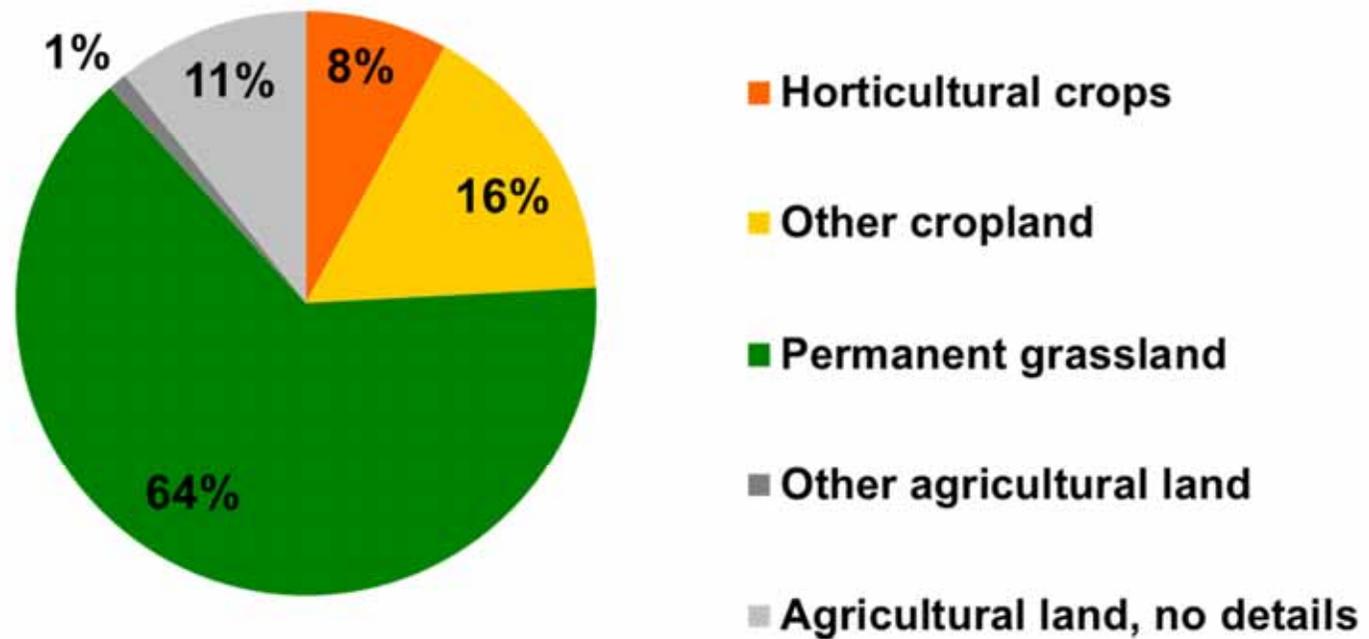
The ten countries/areas with the highest shares of organic agricultural land 2010



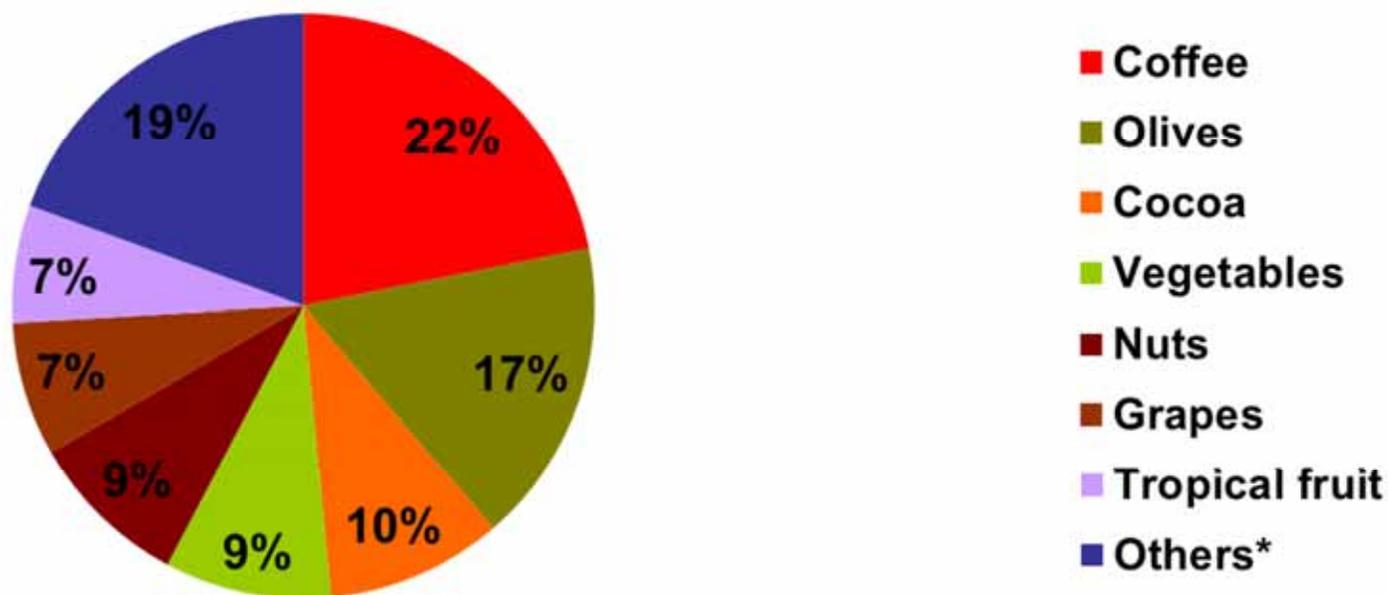
Austria, Switzerland and Germany: Share of selected products/product groups of all products sold 2011



Use of organic agricultural land 2010 world-wide: Horticultural crops, further uses (total: 37 million hectares)

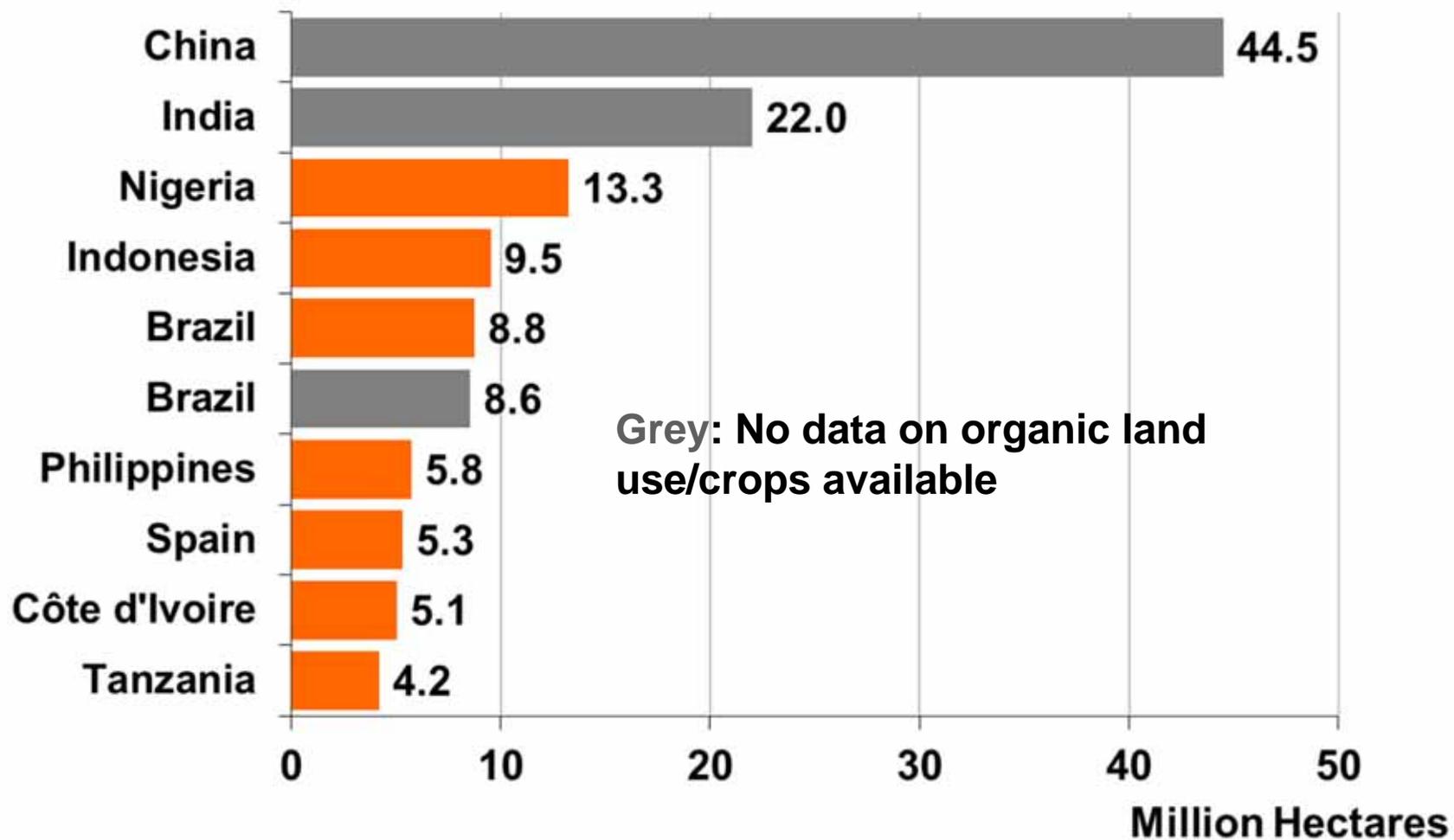


Use of organic horticultural land 2010 (Total: 2.9 million hectares)

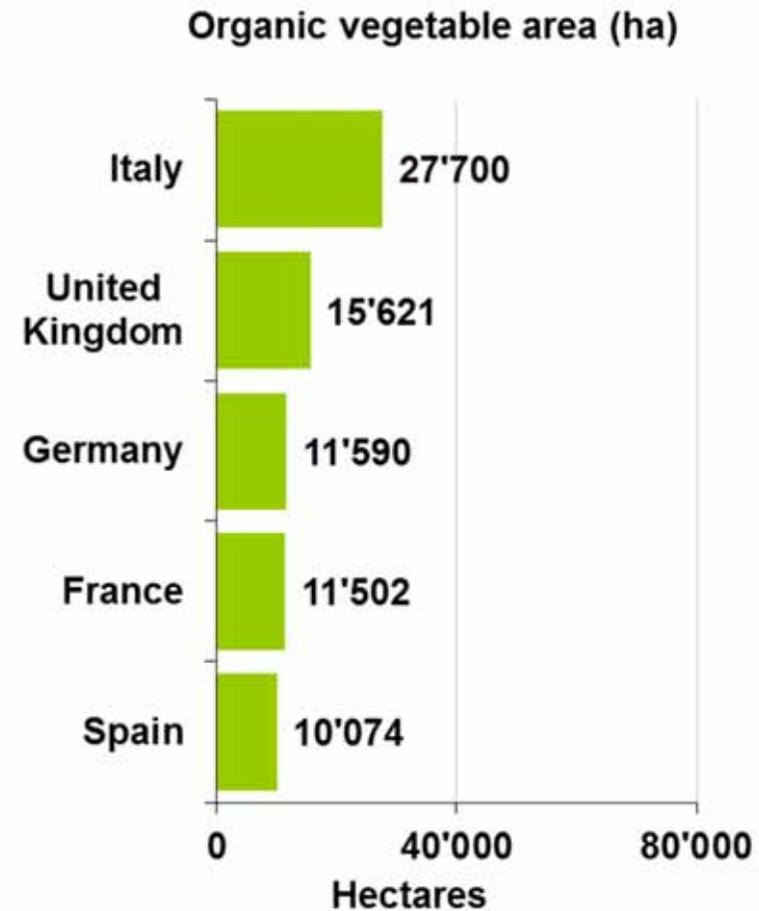
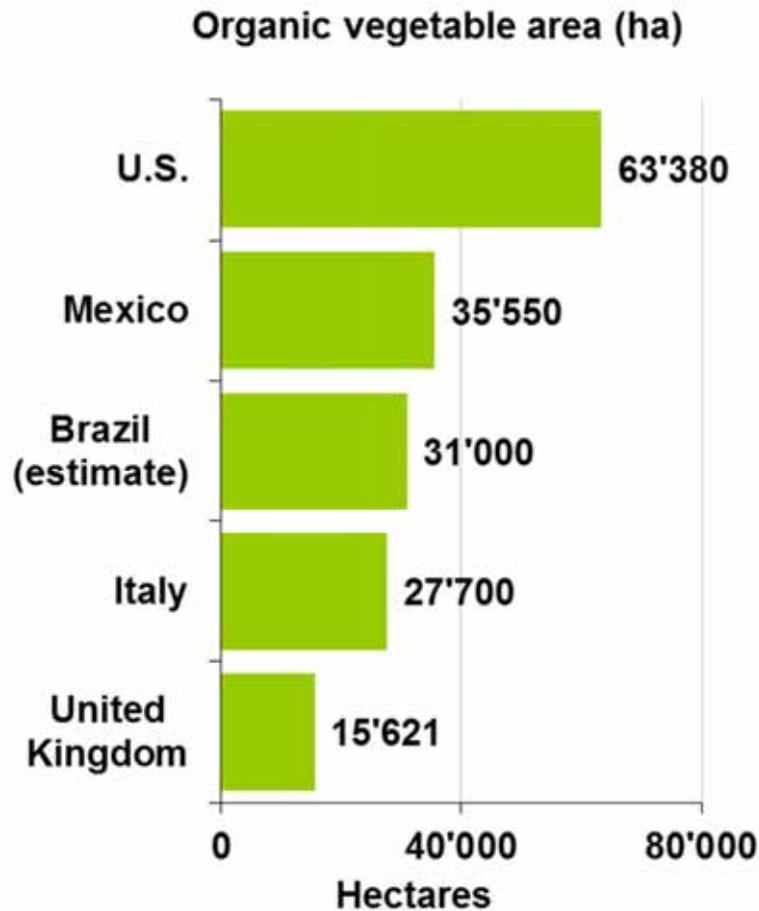


*Others: Temperate & citrus fruit, hops, flowers and ornamentals, medicinal and aromatic plants, tea

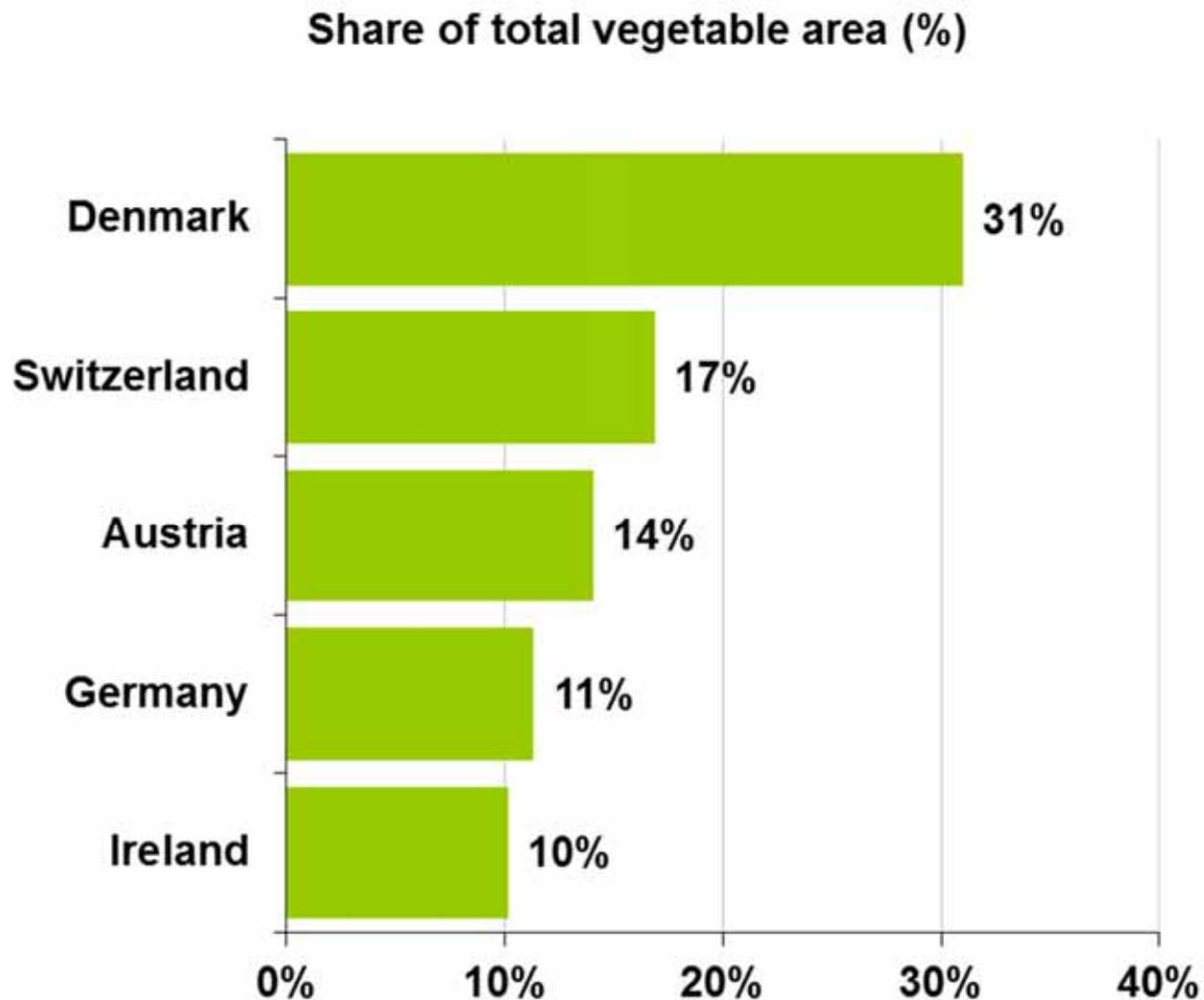
Horticultural crops: The ten countries with the largest horticultural areas 2010



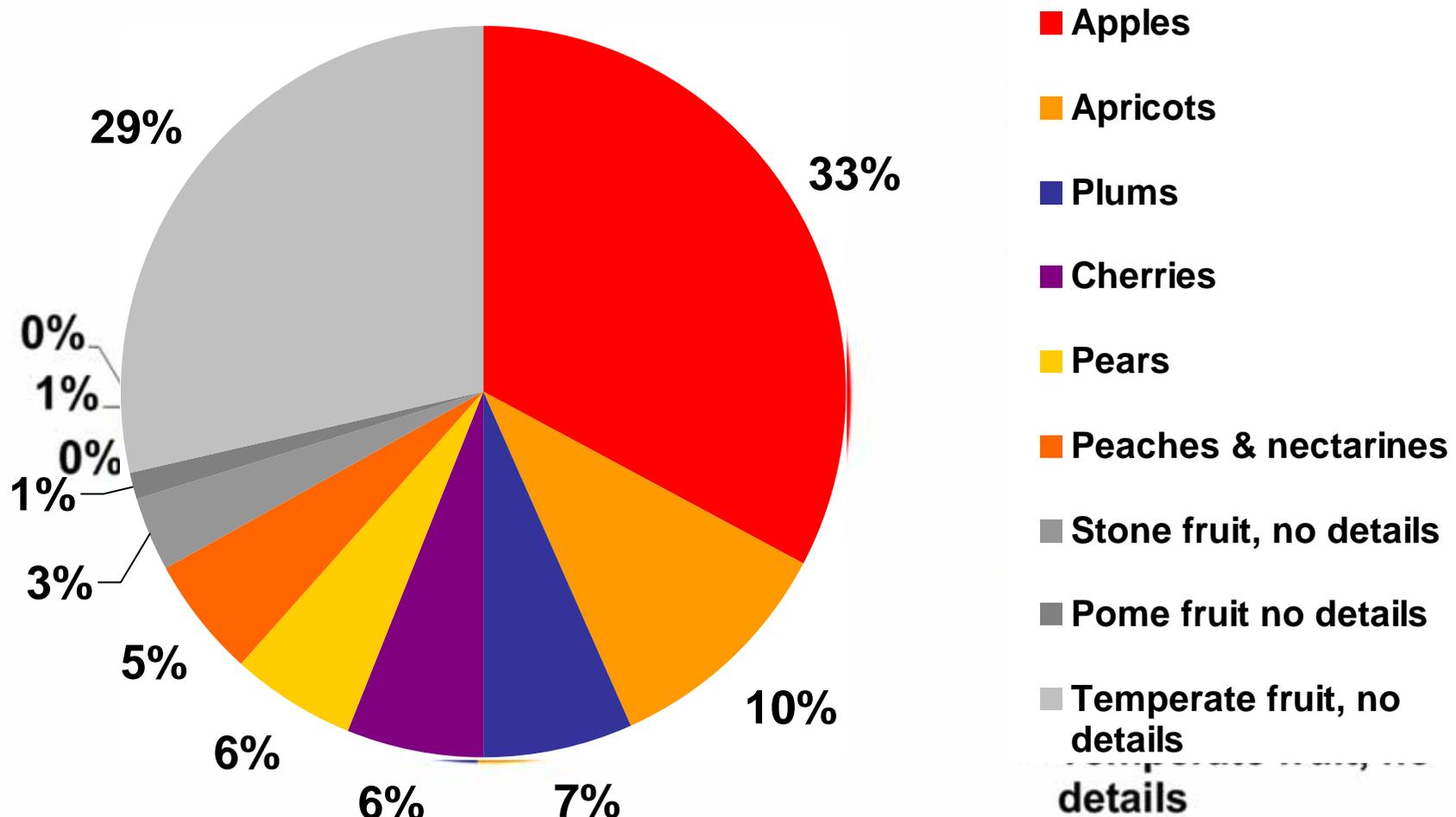
Organic vegetables: The eight countries with the largest areas worldwide 2010



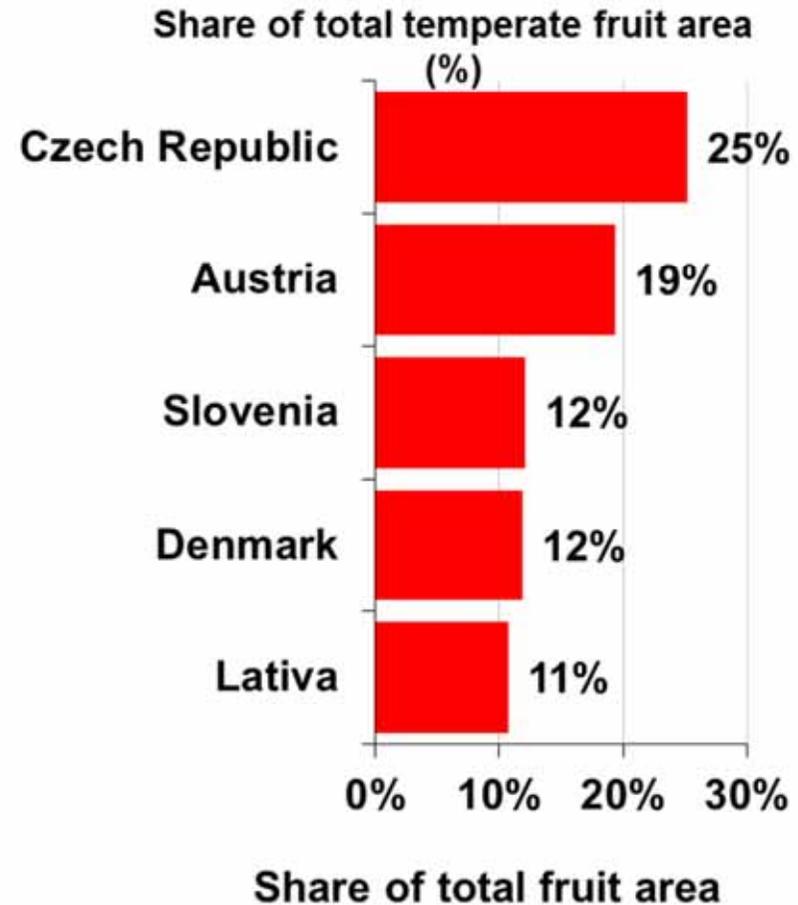
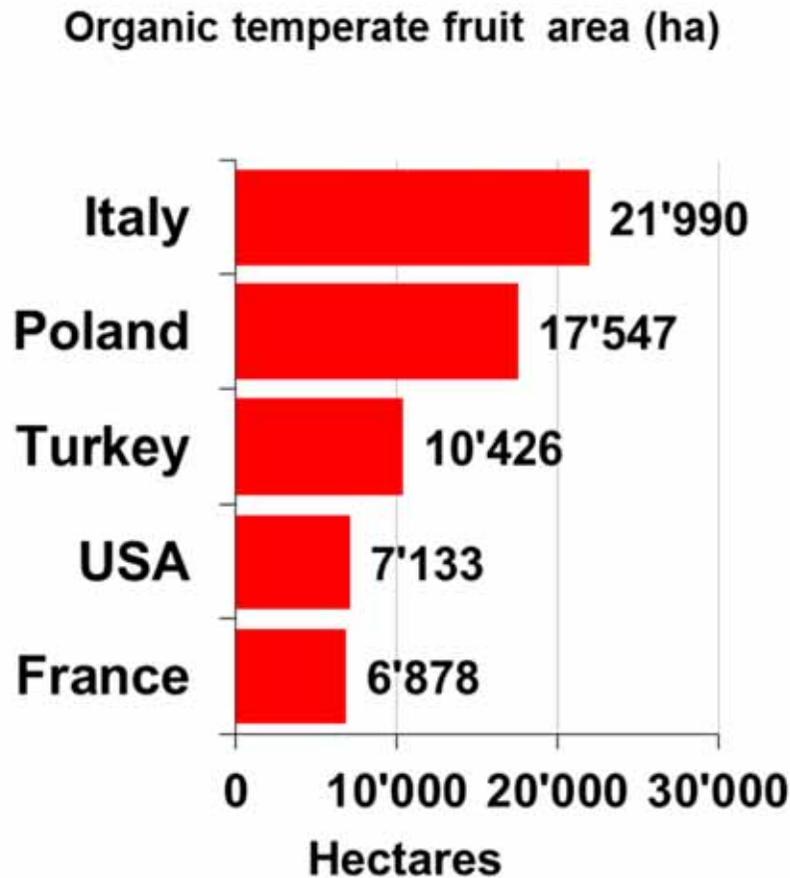
Organic vegetables: The five countries with the largest shares in Europe 2010



Organic temperate fruit area worldwide 2010 (total: 125'000 hectares)

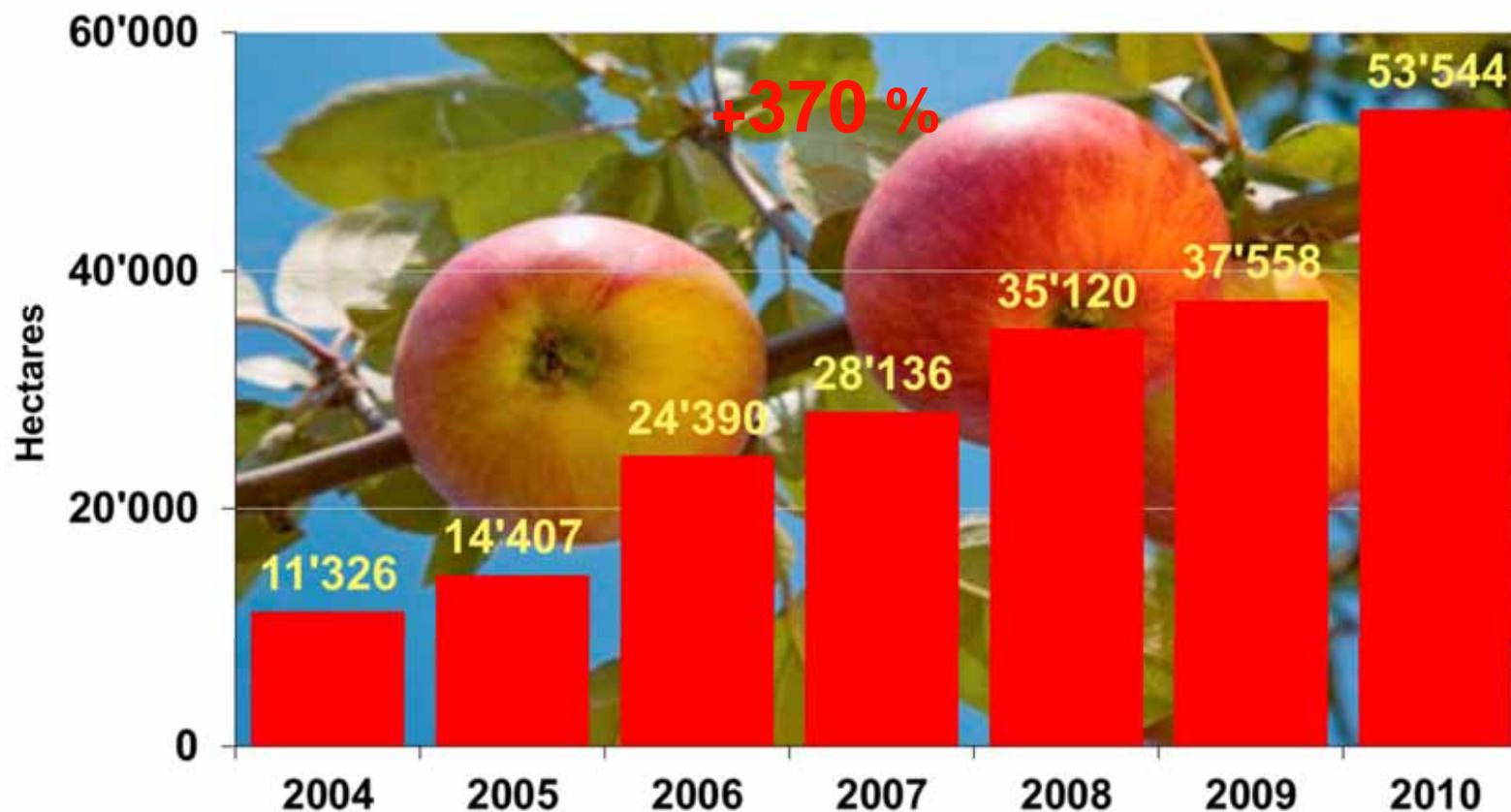


Organic temperate fruit: The five countries with the largest areas and shares worldwide 2010

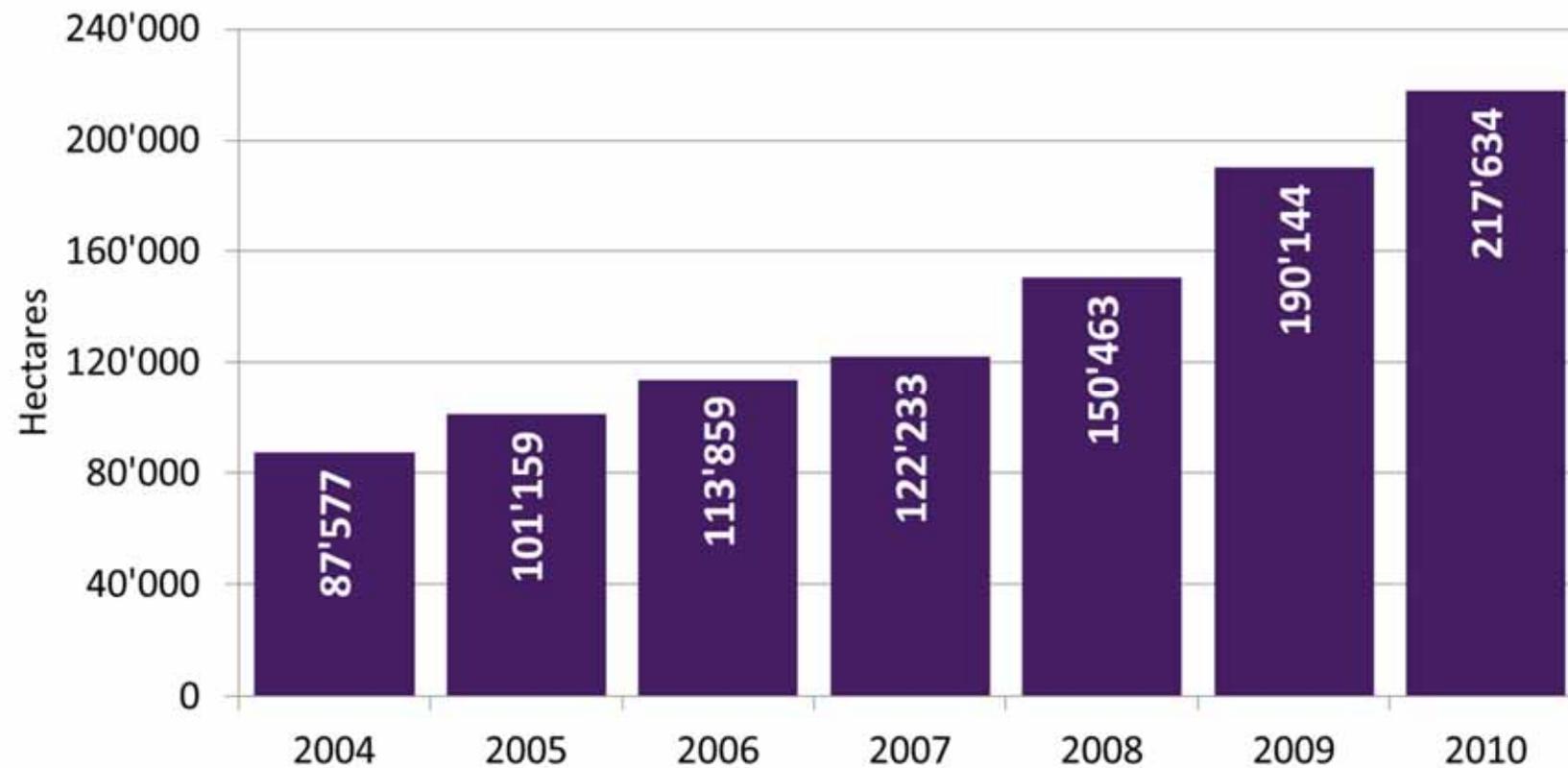


Source: FiBL 2012, based on national data sources, shares calculated with FAOSTAT data

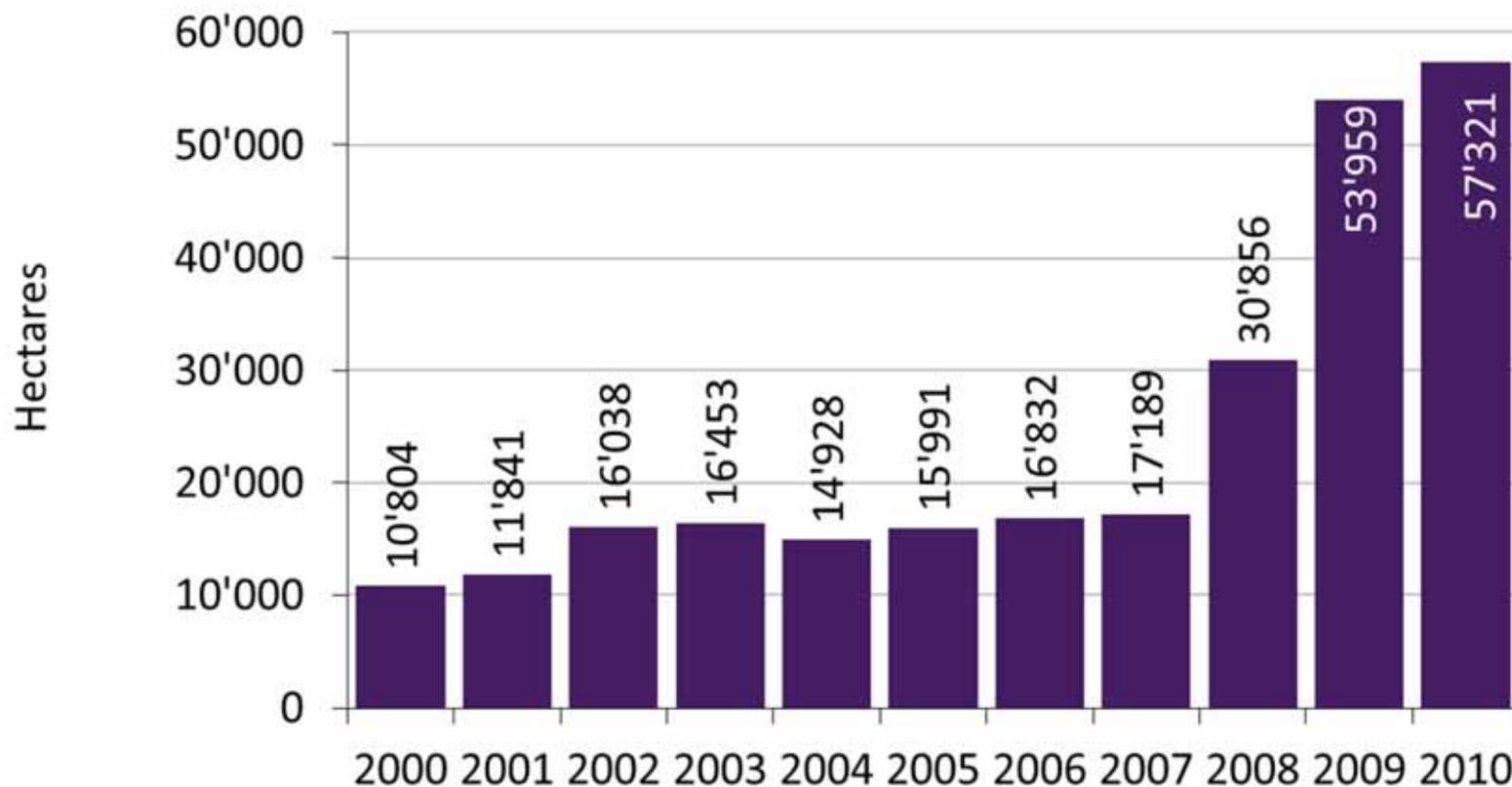
Organic apples: Growth of organic area in Europe 2004-2010



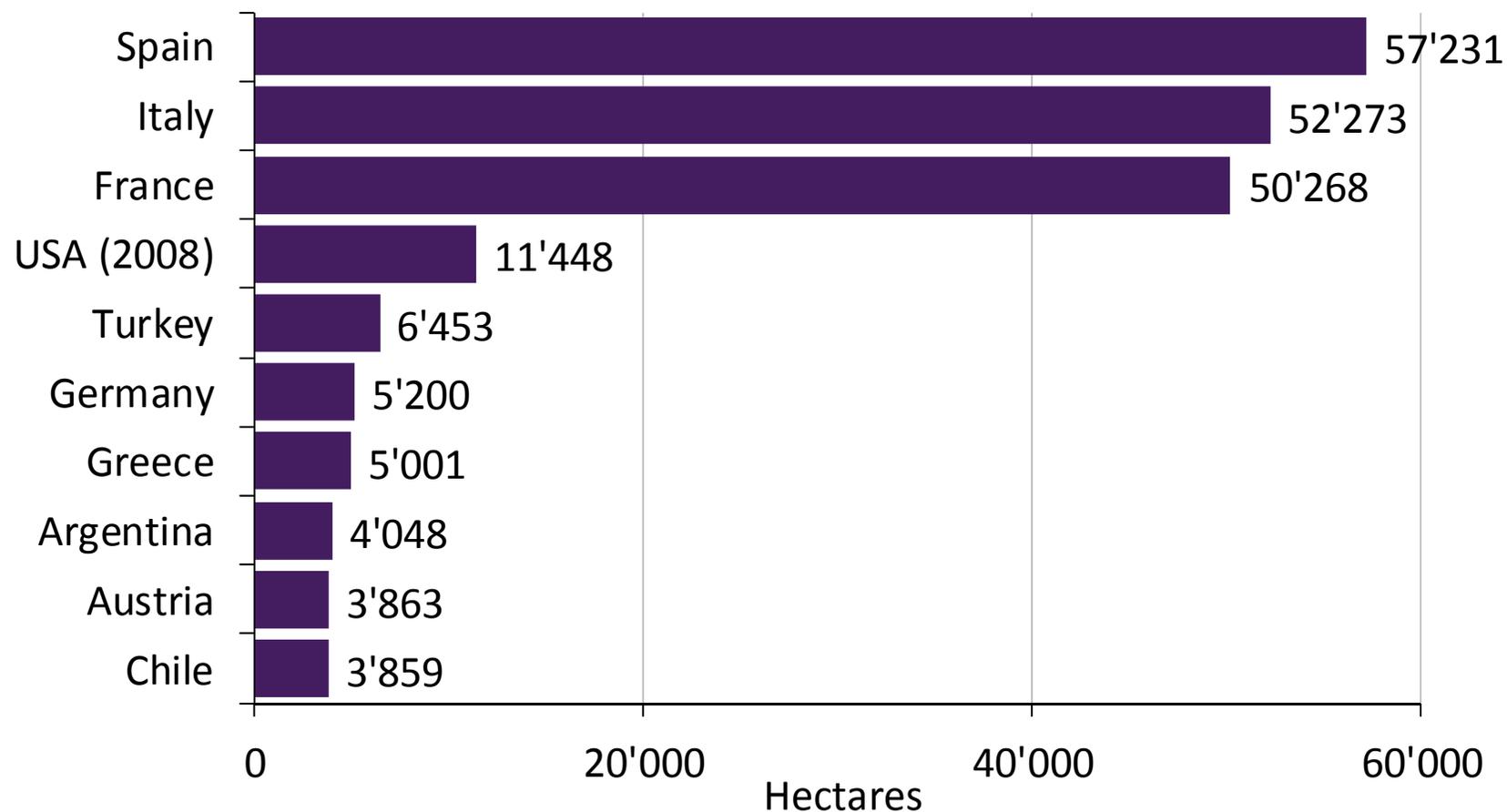
Organic grapes: Growth of the global organic area 2004-2010



Development of the organic grape area 2000-2010 in Spain (including in-conversion areas)



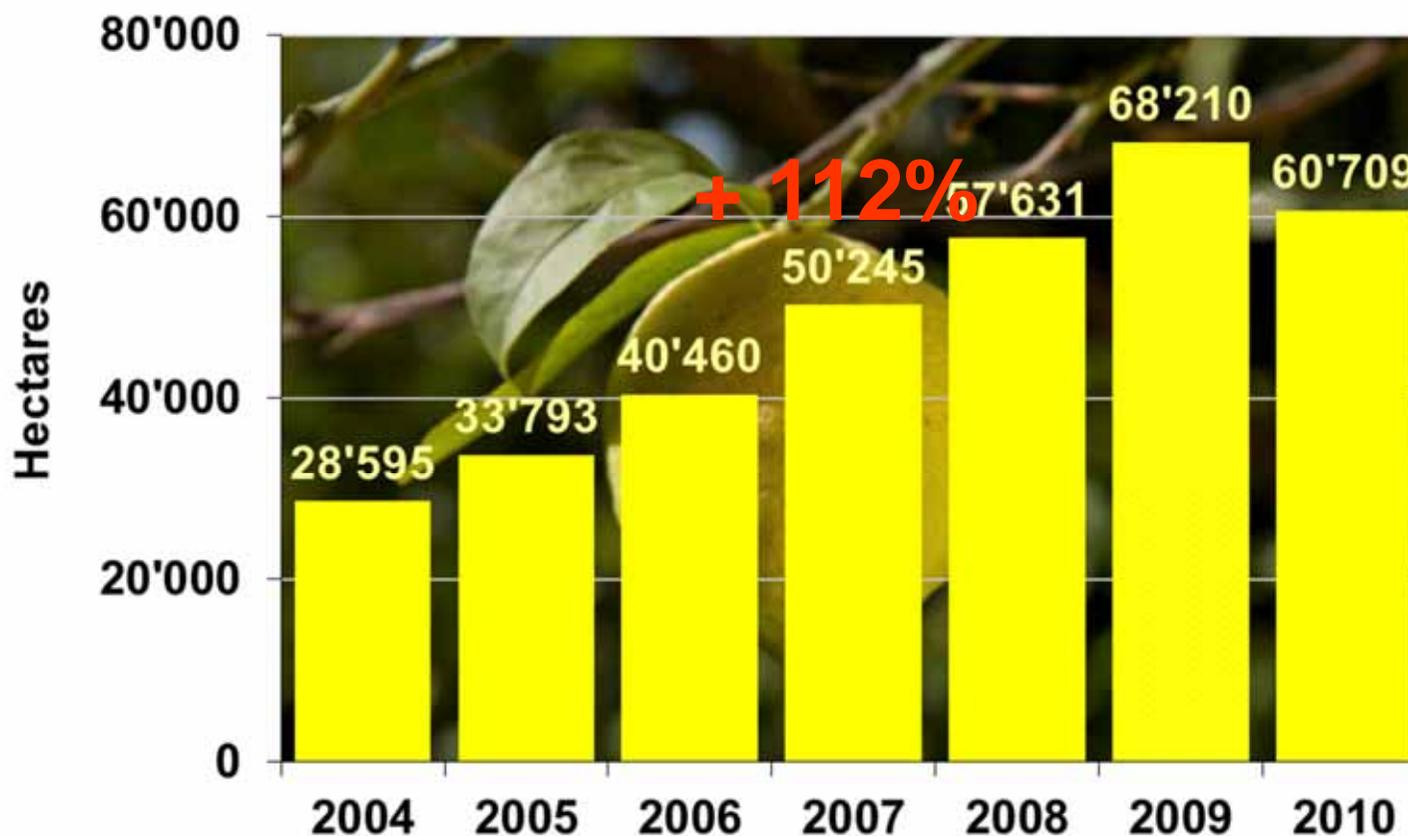
Organic grapes: The ten countries with the largest areas 2010



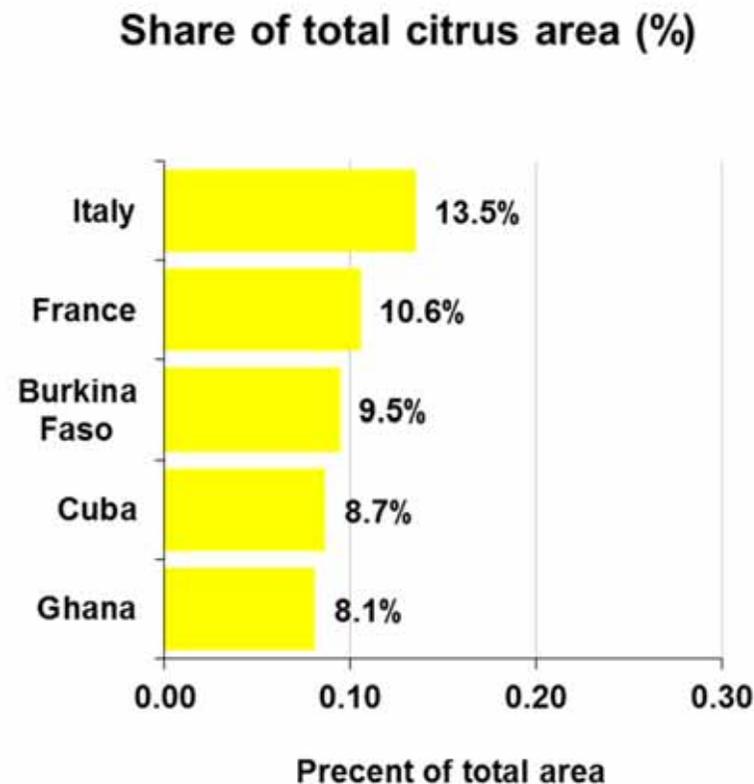
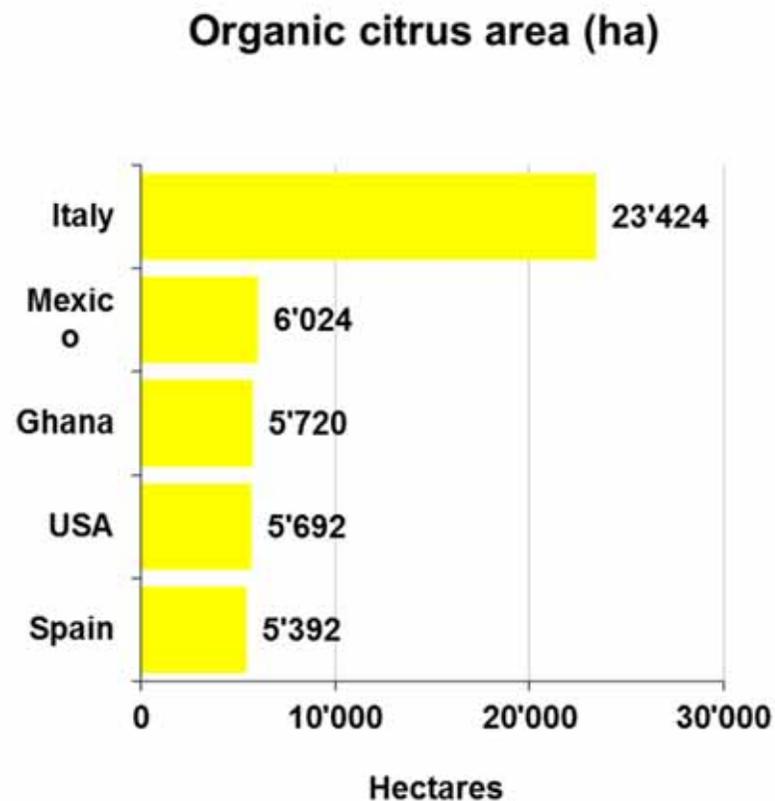
Organic grapes: The ten countries/areas with the highest shares 2010



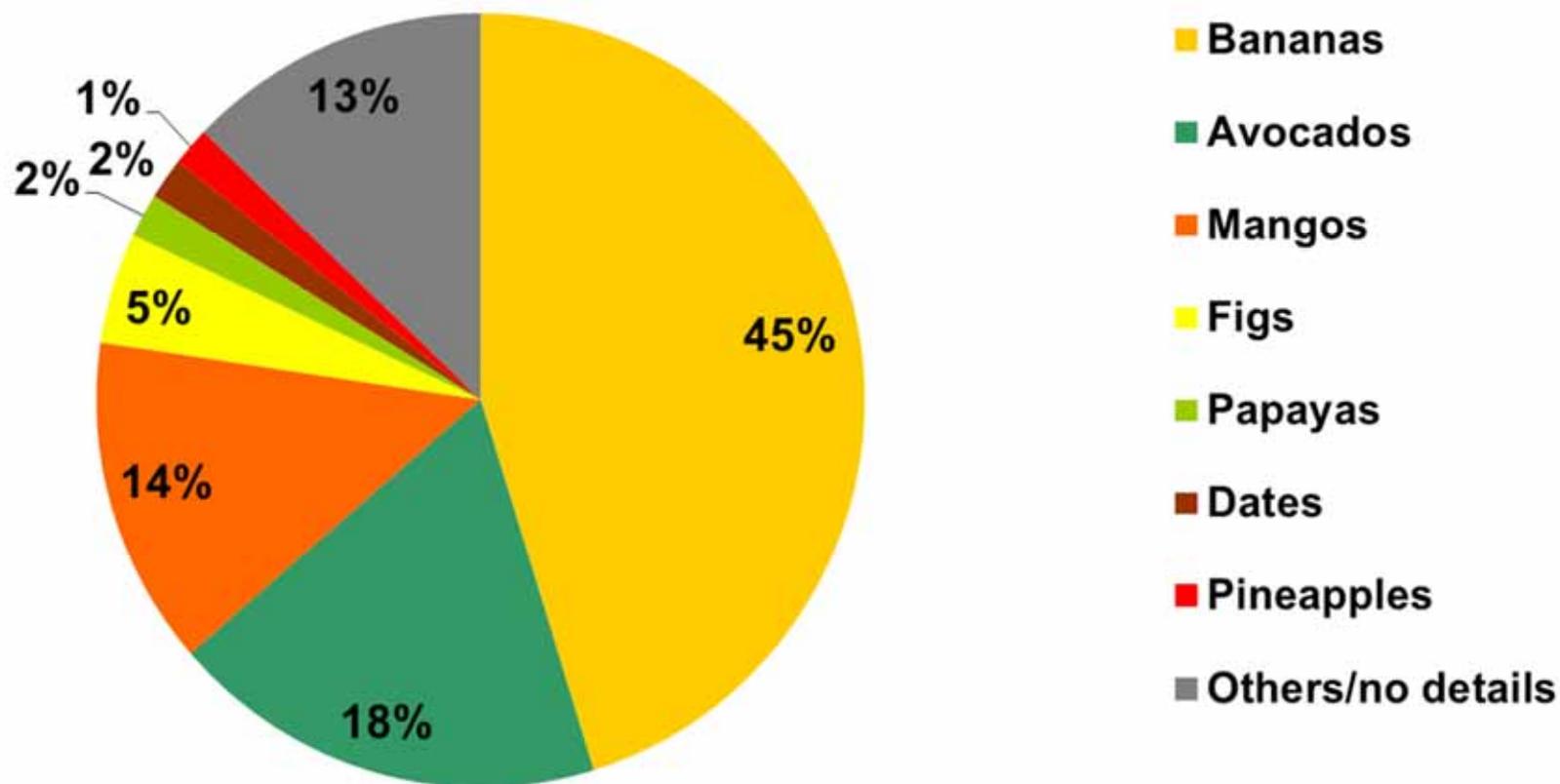
Organic citrus fruit: Growth of the organically land world-wide 2004-2010



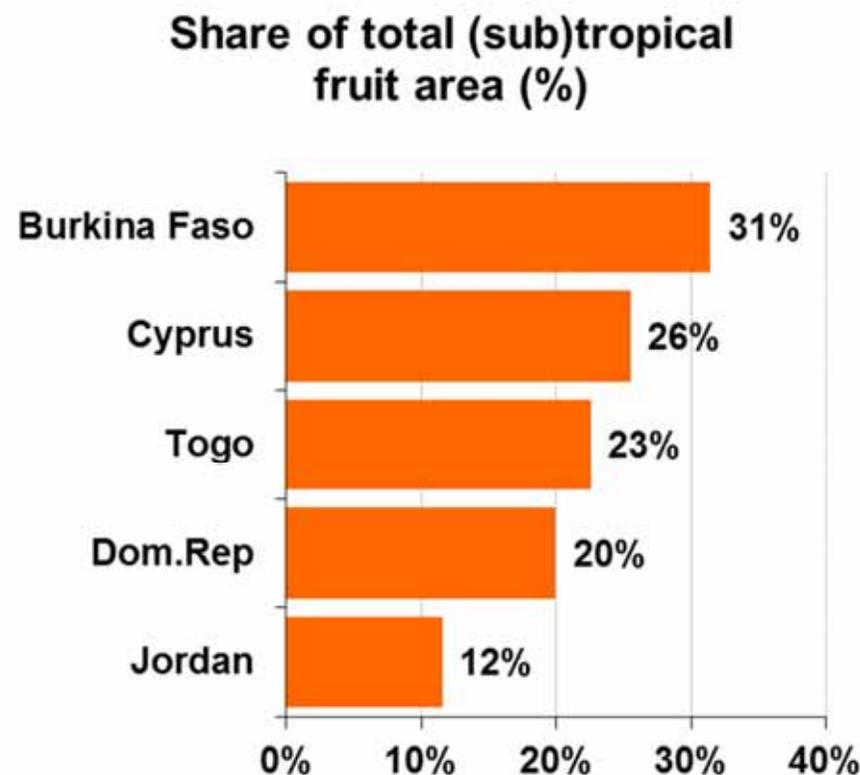
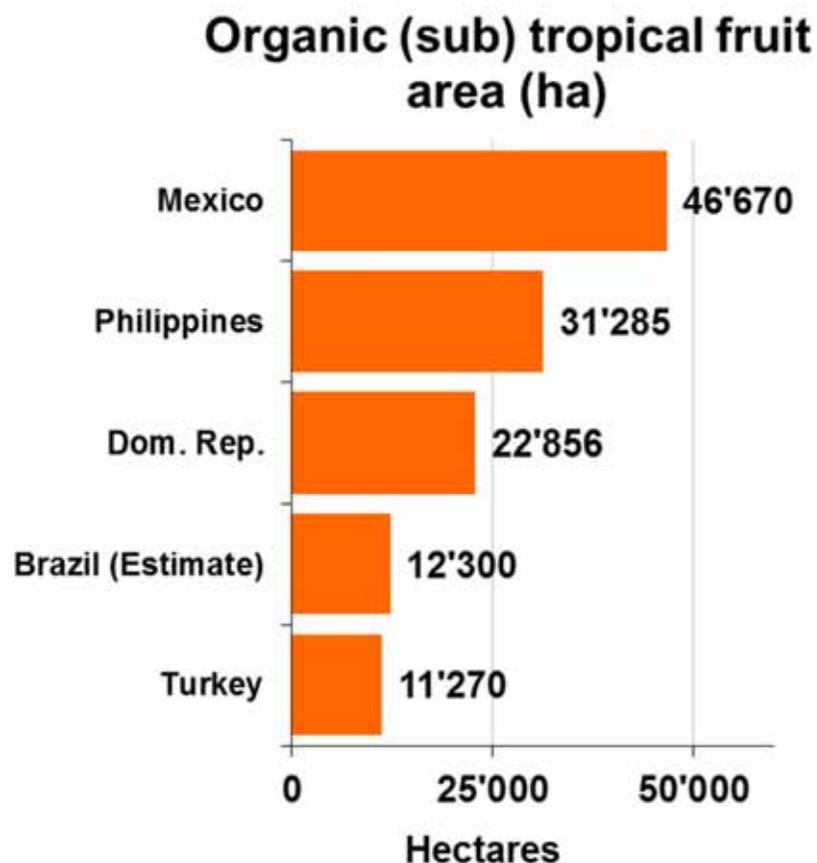
Organic citrus fruit: The five countries with the largest areas and shares worldwide 2010



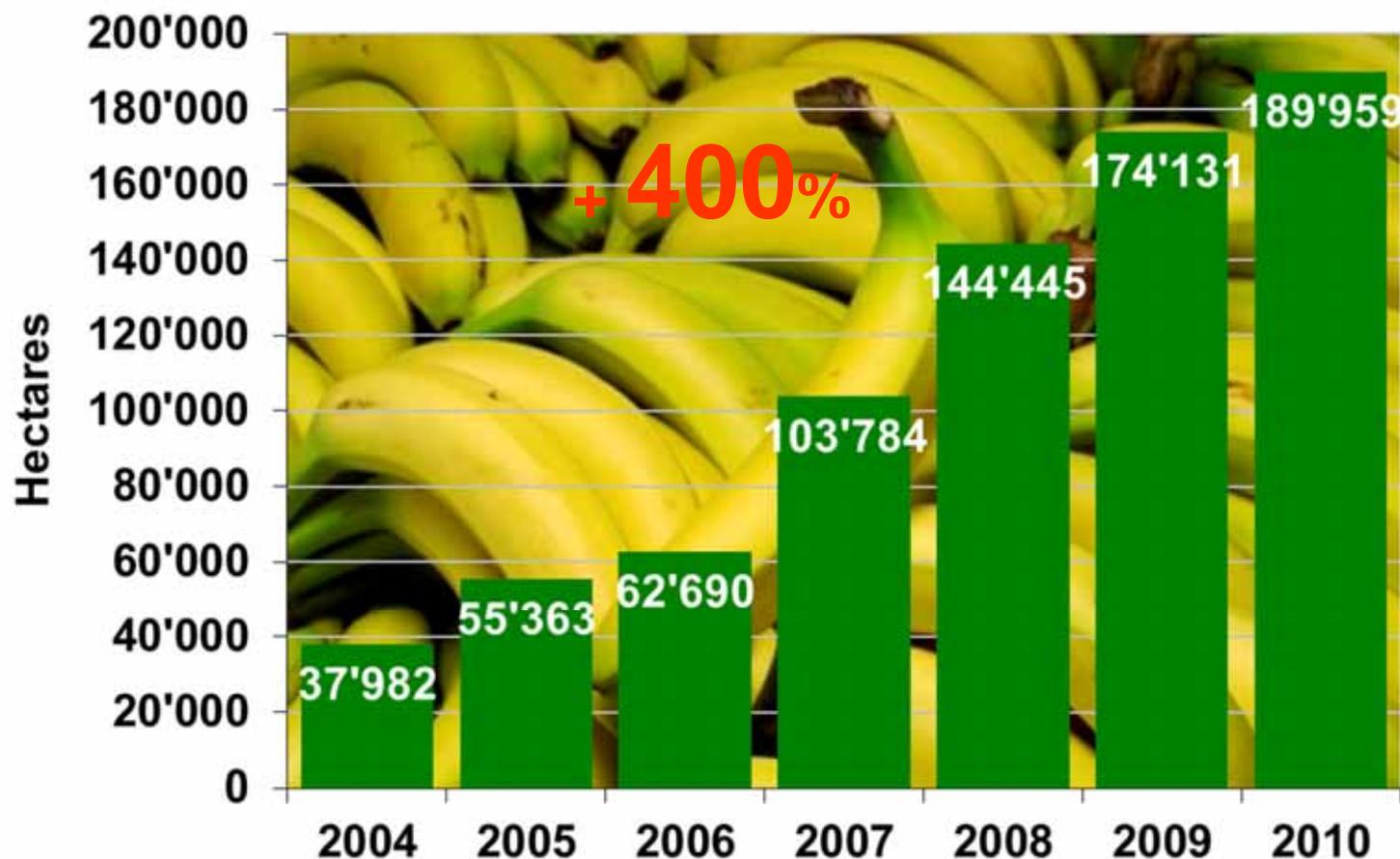
Organic tropical and subtropical fruit: Crop pattern 2010 (total: 190'000 hectares)



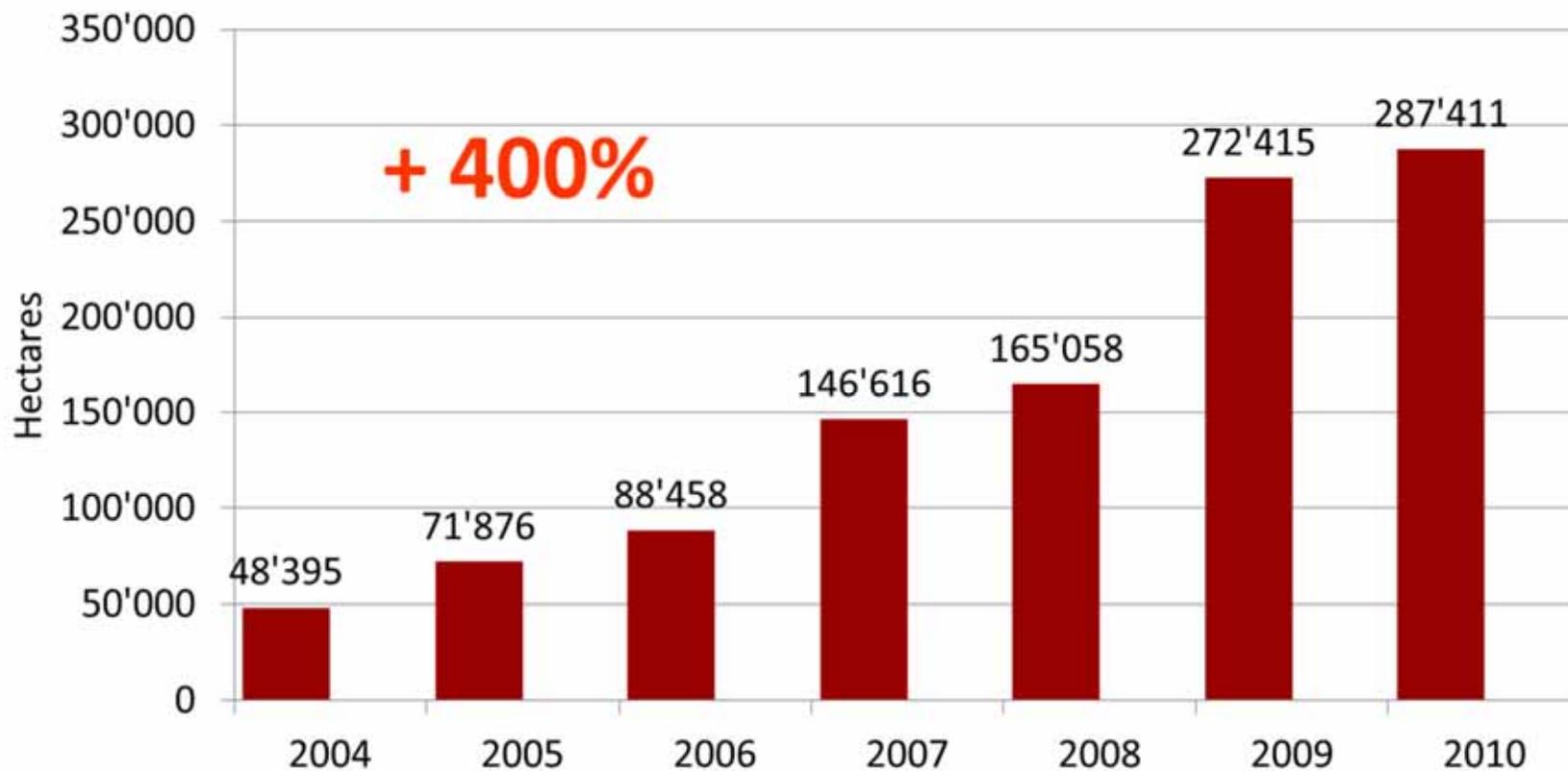
Organic tropical and subtropical fruits: The five countries with largest areas and shares 2008



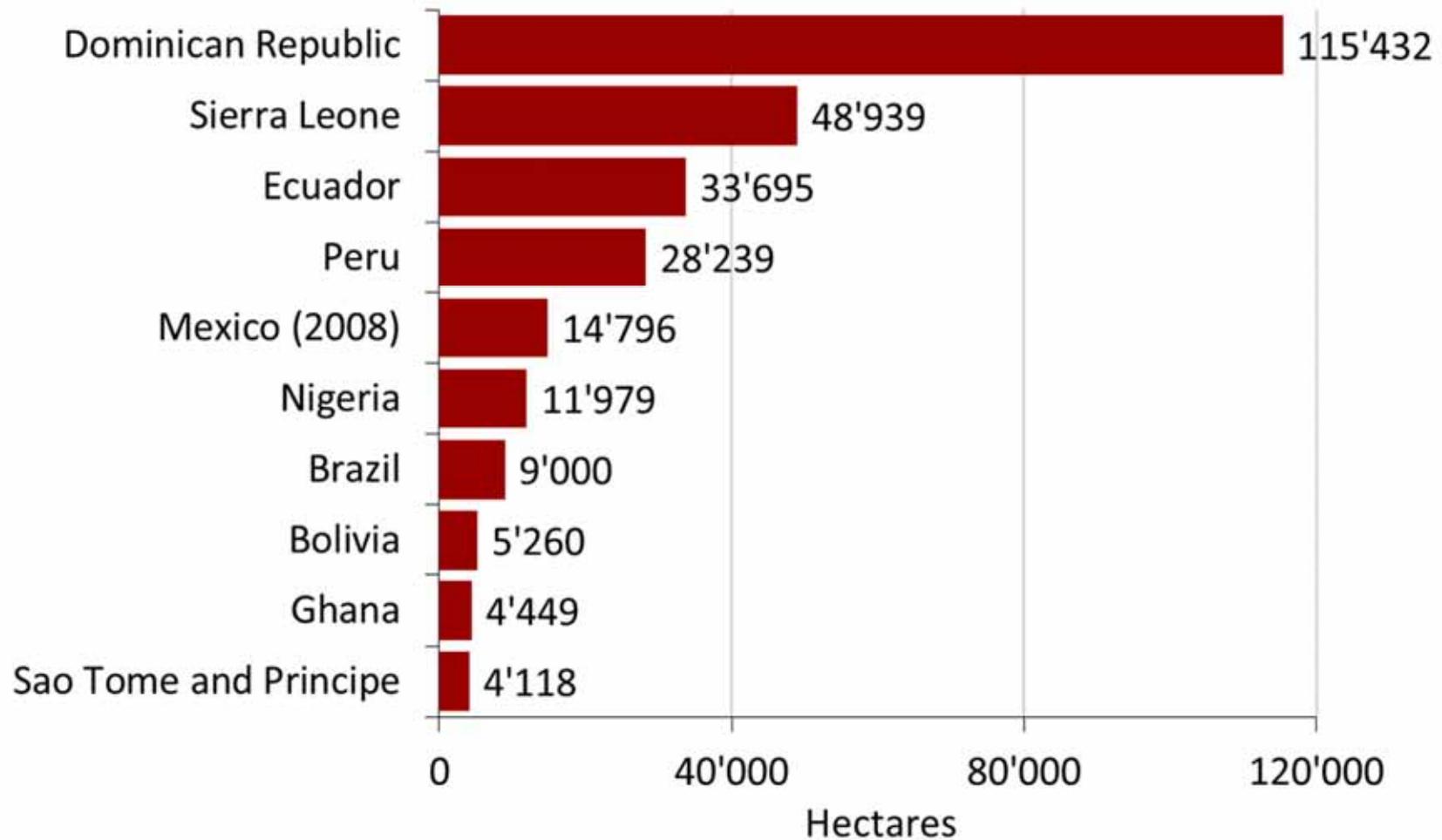
Organic tropical and subtropical fruits: Growth of the organic land 2004-2008



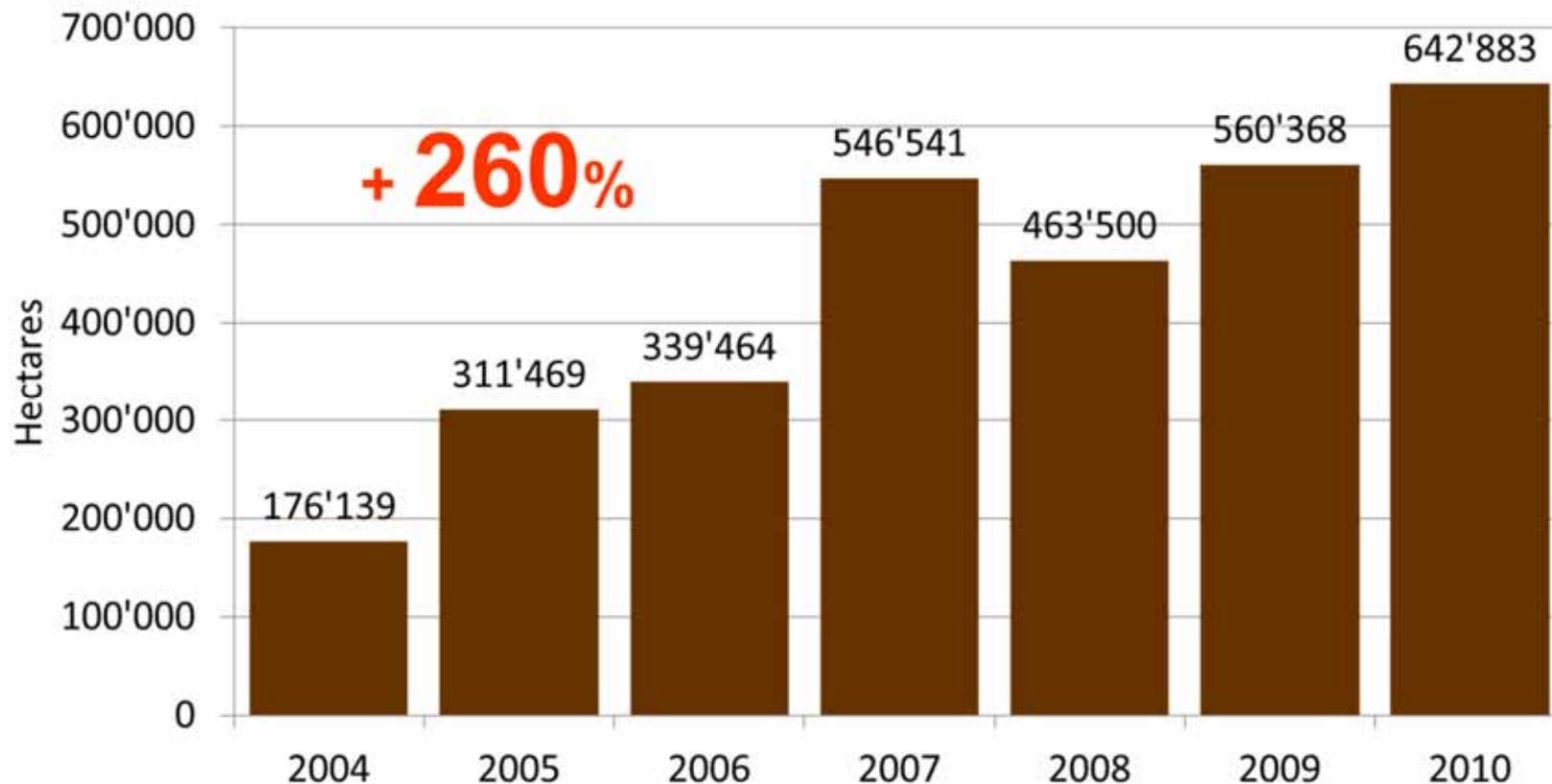
Organic cocoa: Growth of the organically managed land 2004-2010



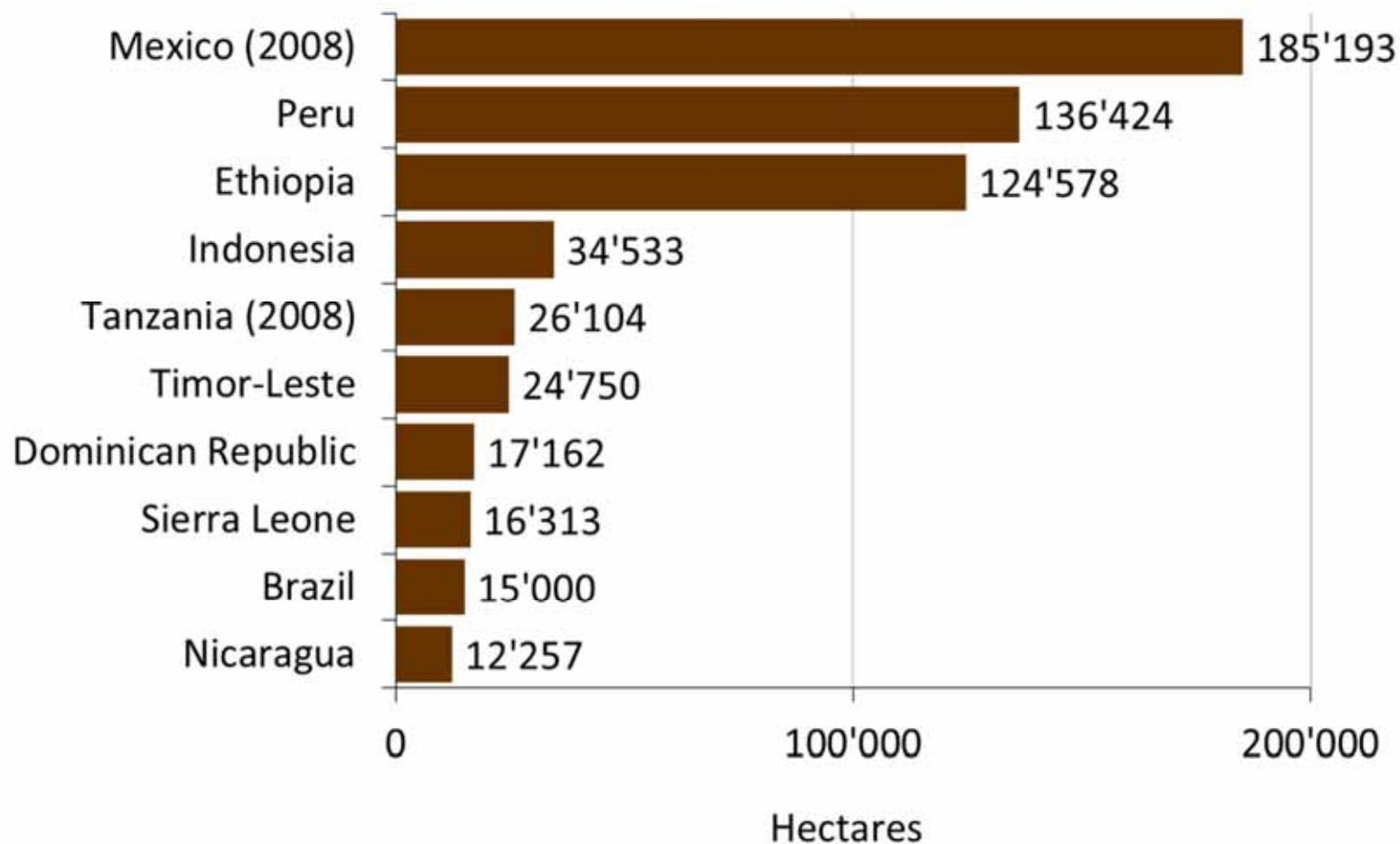
Organic cocoa area: The ten leading countries 2010



Organic coffee: Growth of the organically managed land 2004-2010



Organic coffee area 2010: The ten countries with the largest areas



Key horticultural crop groups: Growth and shares

Land use/crop type	Global growth 2004-2008	Global share 2008	Highest shares 2008
Organic agricultural land	18 %	0.8 %	37 % Falkland Islands
Horticulture	120%	1 %	27.6 %: East Timor
Vegetables	113 %	0.4 %	18 %: Denmark
Temperate fruit	74 %	0.7 %	24 % Austria
Tropical fruit	300 %	0.7%	15 % Dominican Republic
Citrus fruit	100 %	0.7 %	18.9 %: Dominican Republic
Grapes	70 %	2 %	6.3 %: Greece and Italy
Olives	40 %	4.6 %	16.3 % Argentina
Coffee	140 %	4.5 %	40.2 % Timor Leste
Cocoa beans	220%	2 %	

Most challenging crop protection bottlenecks:

- Phasing out of copper (Europe!)
- Control of oomycete fungi (humid conditions)
- Control of bacterial diseases
- Control of vector-transmitted diseases (e.g. citrus greening, flavescence dorée)
- Mid-term replacement of non-selective insecticides (pyrethrine)
- Control of post-harvest diseases

Conclusions

- The demand for organic produce is growing in the main markets (EU, USA, asia)
- Organic agriculture is in line with mainstream trends (low/no residue, low input, eco-system services)
- The production is often limited to the most suitable pedo-climatic conditions (least disease and pest pressure)
- If biocontrol agents can adequately control key pests/diseases, production areas will grow rapidly und thus also extend the demand for existing biocontrol PPPs

References

Research Institute of Organic Agriculture [online]: Data tables from the FiBL-IFOAM survey on organic agriculture worldwide. The Organic World website, maintained by the Research Institute of Organic Agriculture (FiBL), Frick, Switzerland. Last update: May 6, 2012. Available at <http://www.organic-world.net/statistics-data-tables.html?&L=0>

Willer, Helga and Julia Lernound (2012): Organic Agriculture Worldwide: The Results of the Global Survey on Organic Agriculture. In: Willer, Helga and Lukas Kilcher (Eds) (2012): The World of Organic Agriculture. Statistics and Emerging Trends. Research Institute of Organic Agriculture (FiBL), Frick, and International Federation of Organic Agriculture Movements, Bonn

Data from Organic Monitor: Published in various editions of «The World of Organic Agriculture». Further information is available here: <http://www.organic-world.net/yearbook.html?&L=0>

Contact for all data

- Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, 5070 Frick, Switzerland, www.fibl.org