FiBL
Forschungsinstitut für biologischen Landbau
Institut de recherche de l'agriculture biologique
Research Institute of Organic Agriculture

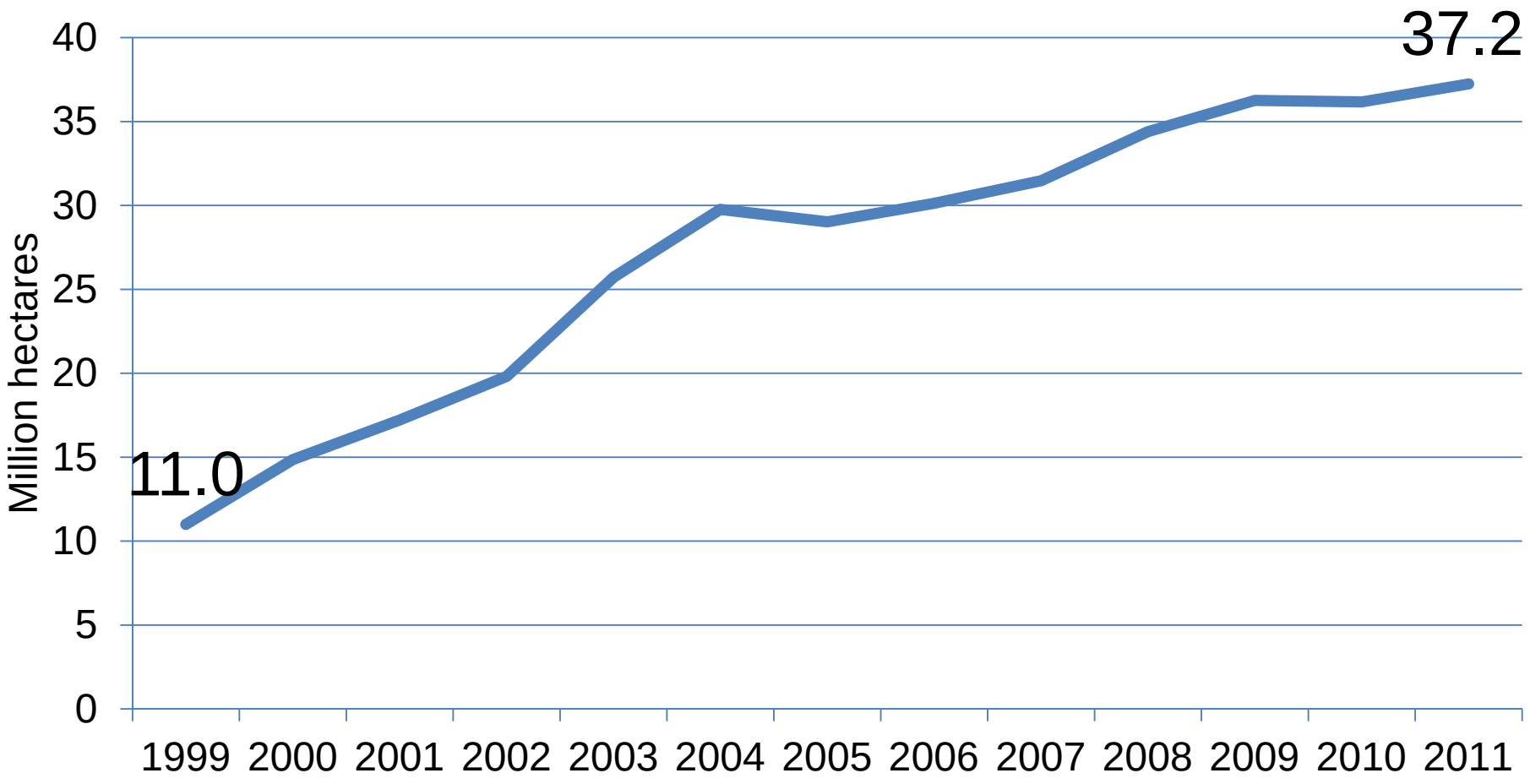
EXCELLENCE FOR SUSTAINABILITY

Organic Data Networks

Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland

BioFach Congress 2013, Nürnberg, Session Organic Market Data Networks, 13.2.2013

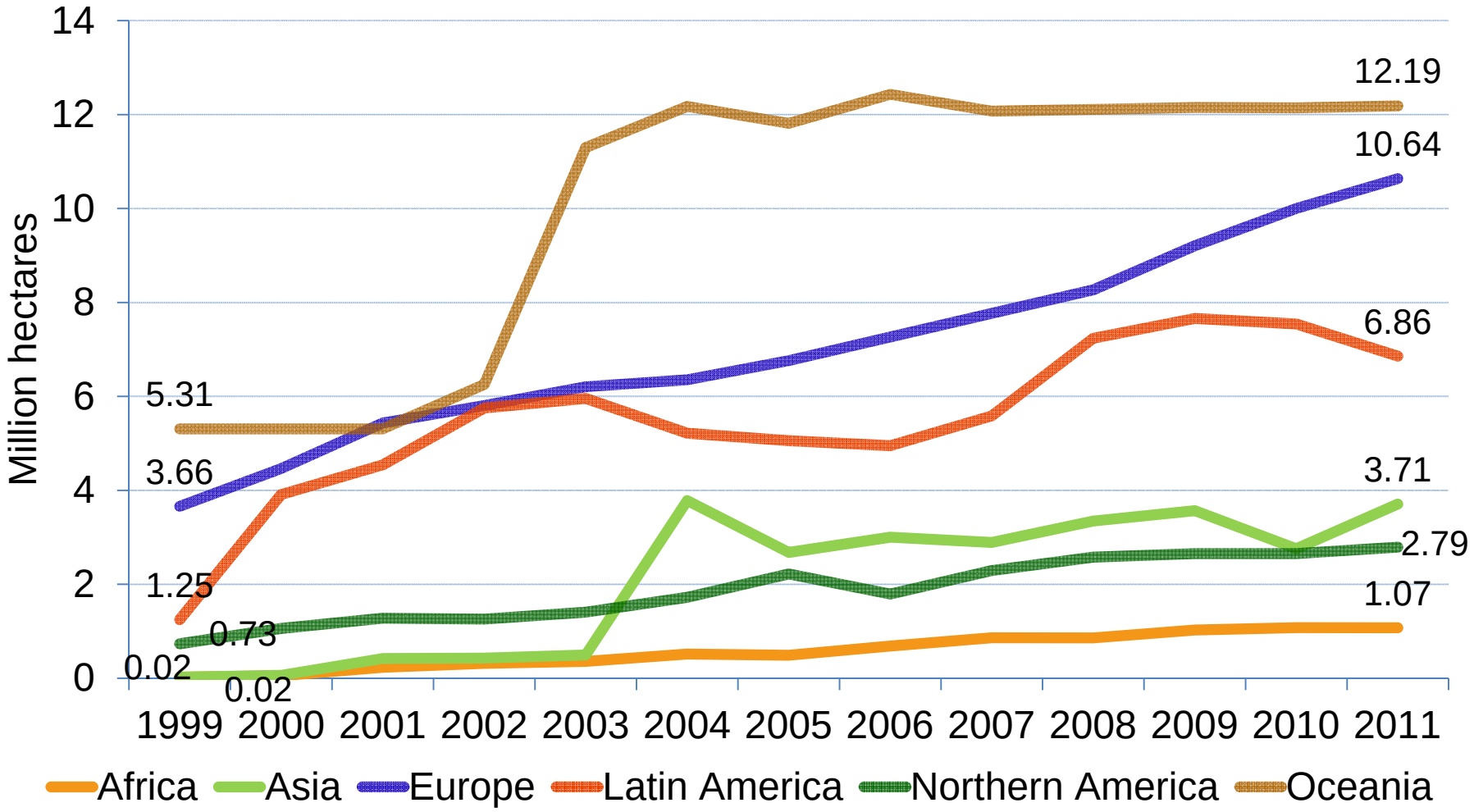
Growth of the organic agricultural land 1999-2011



FiBL www.fibl.org

Source: FiBL-IFOAM-SOEL Surveys 2000-2013,based on data from governments, the private sector and certifiers.

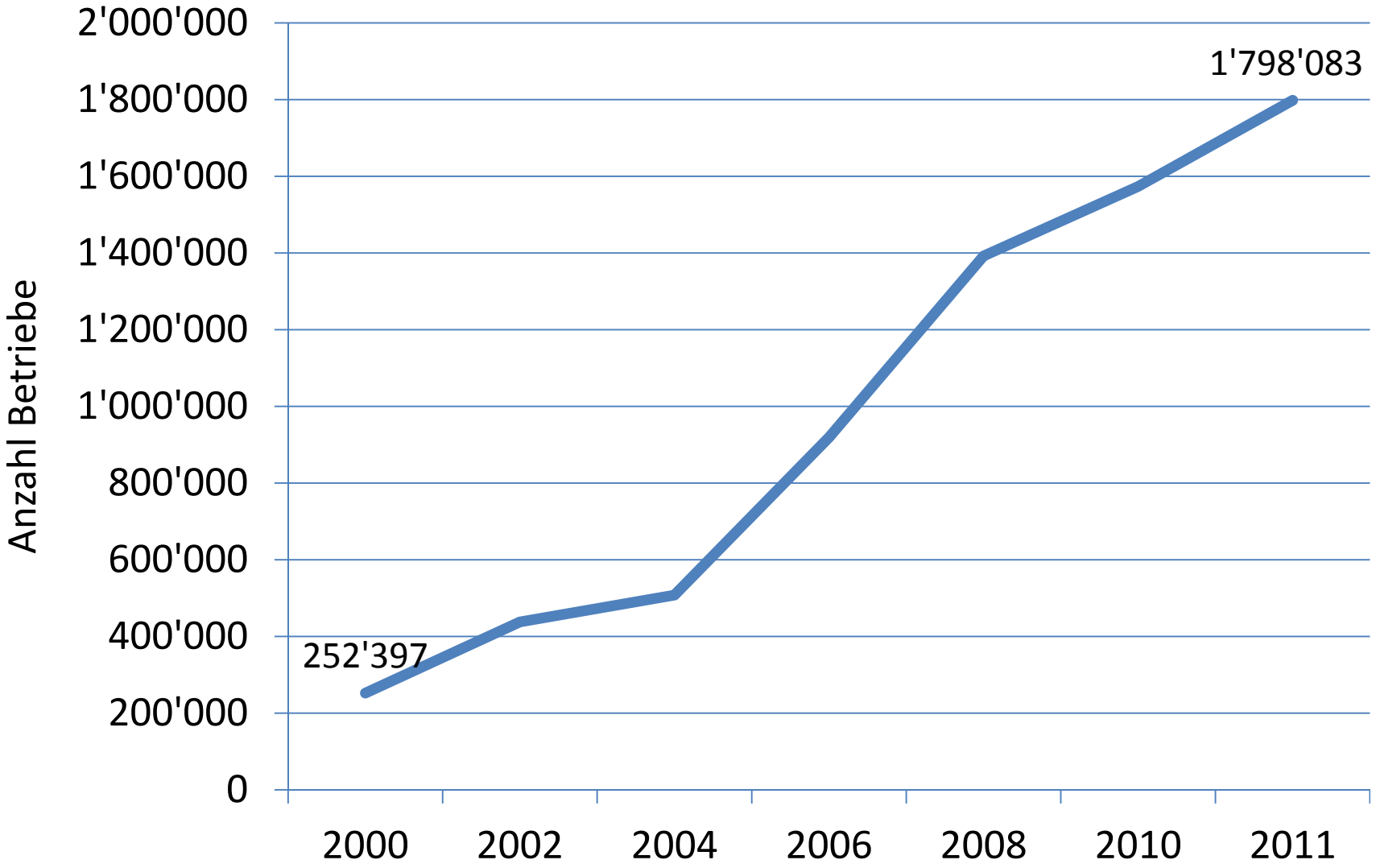
Development of organic agricultural land in the regions 1999-2011



Source: FiBL-IFOAM-SOEL Surveys 2000-2013,based on data from governments, the private sector and certifiers.

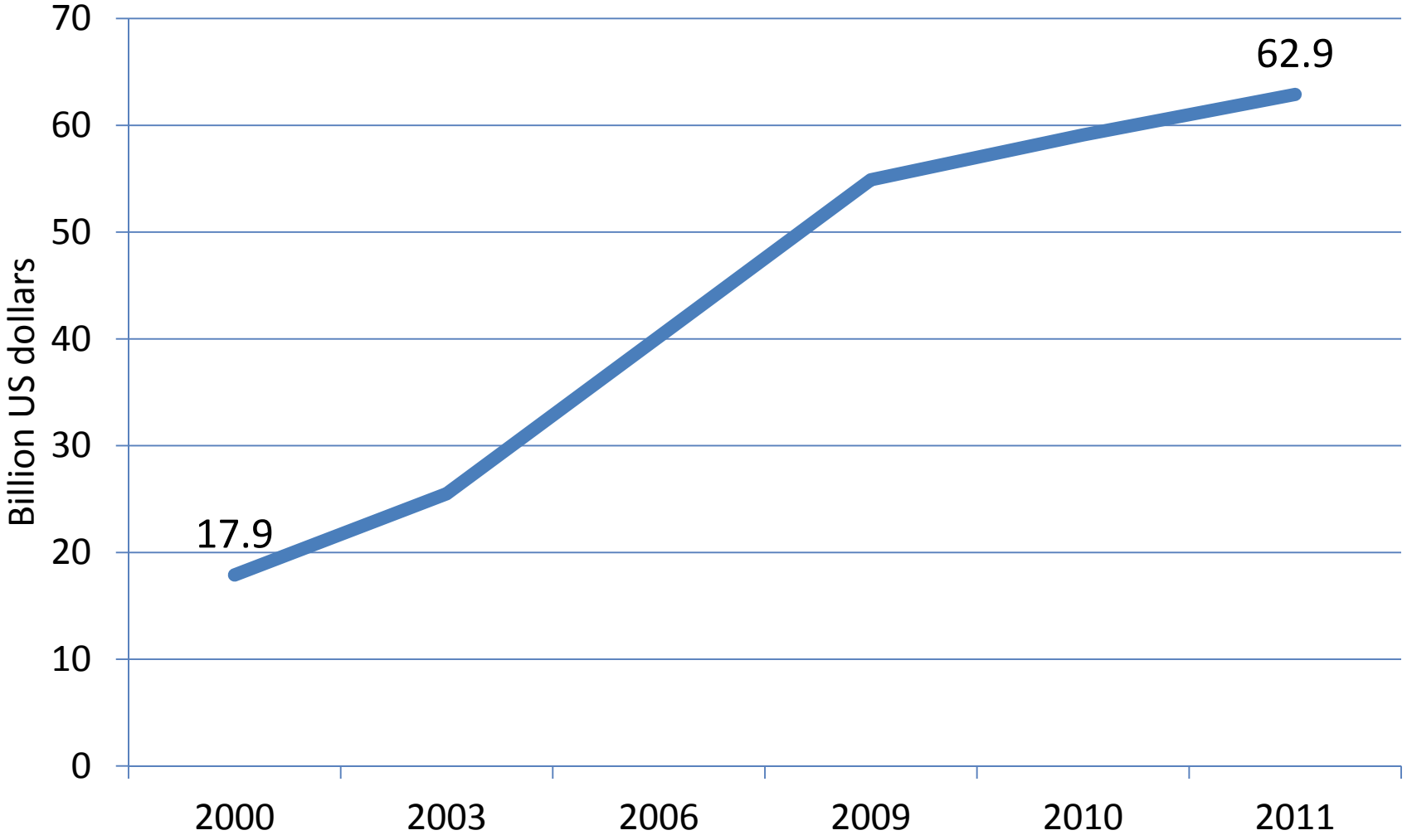
Development of the number of organic farms 1999-2011

Source: FiBL-IFOAM surveys 1999-2013



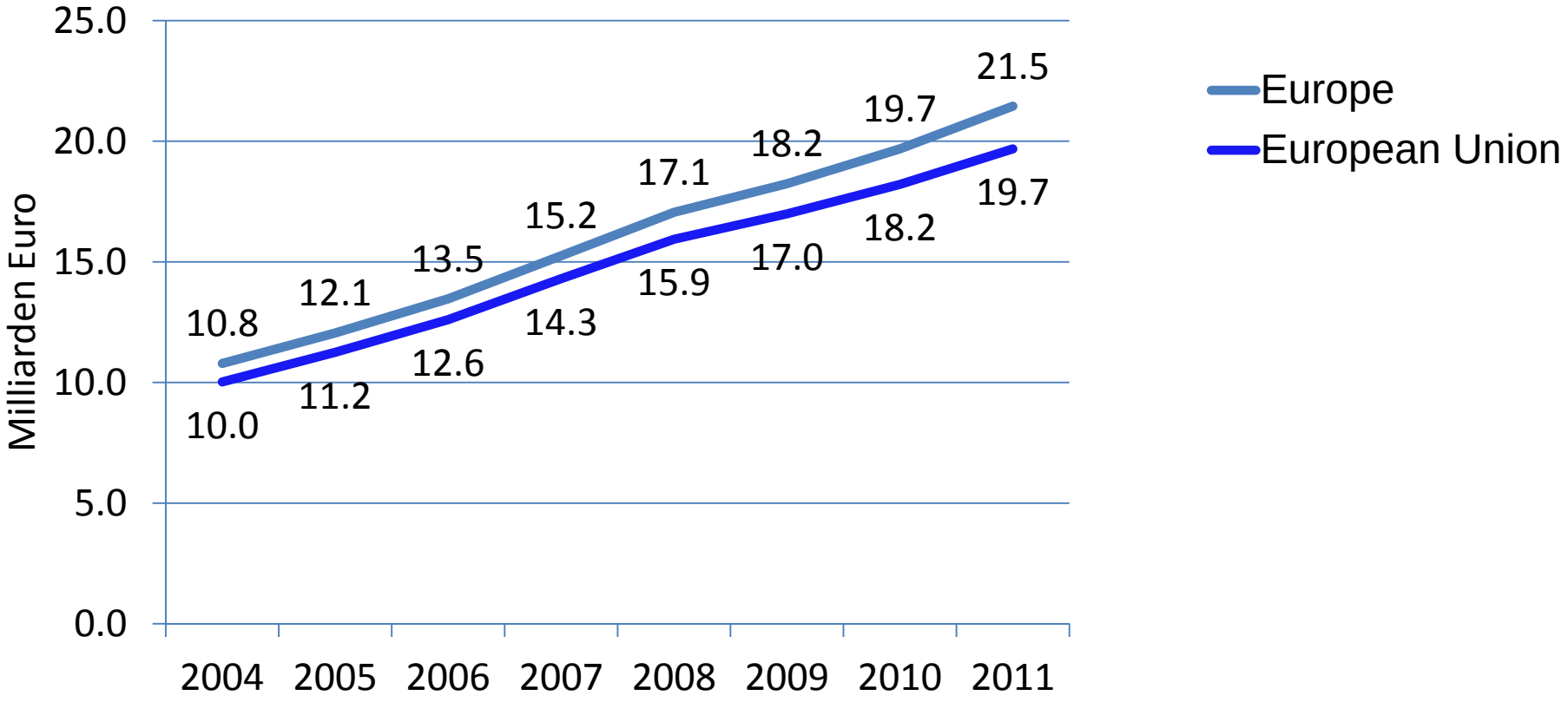
Source: FiBL-IFOAM-SOEL Surveys 2000-2013,based on data from governments, the private sector and certifiers.

Development of the global market for organic food 2000-2011



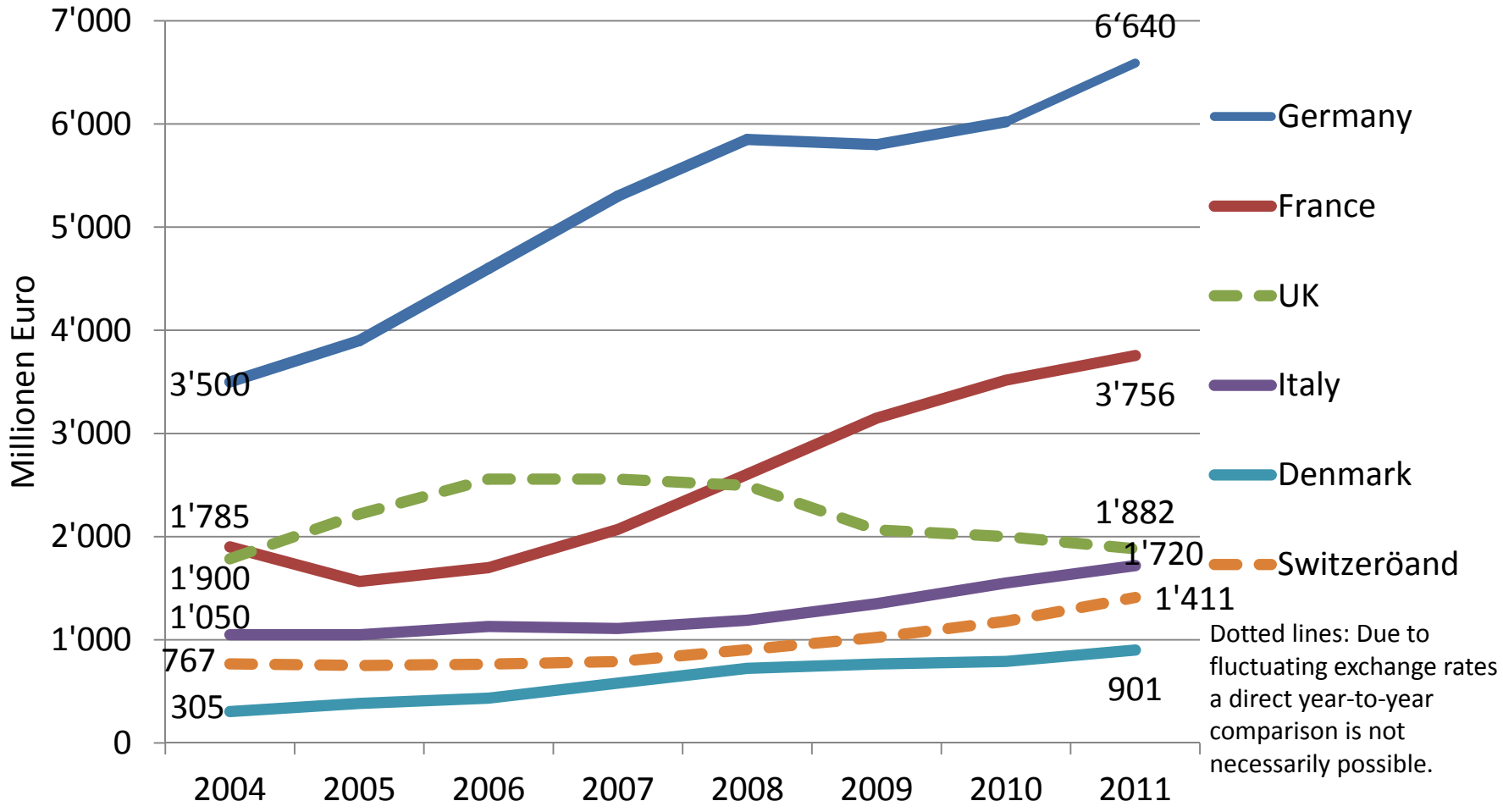
Source: Organic Monitor, various years

Europe and European Union: Market growth 2004-2011

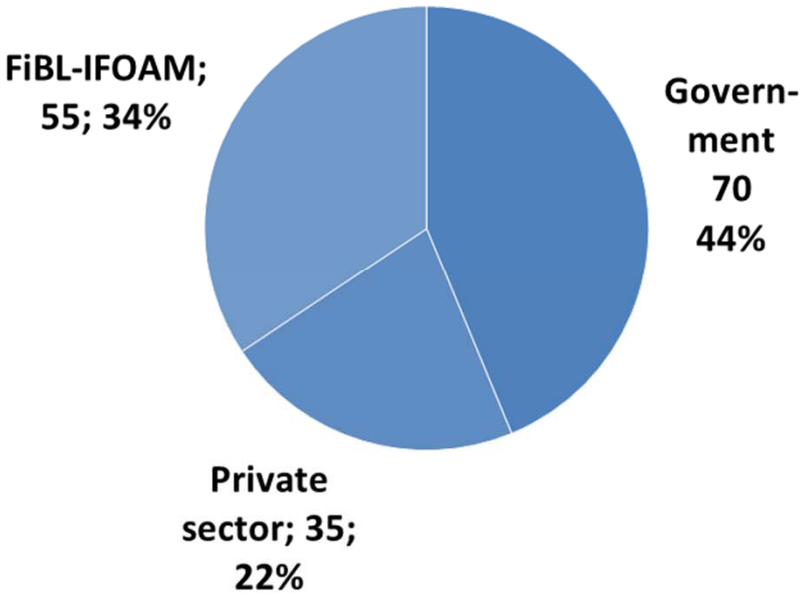


Source: FiBL-AMI Surveys 2000-2013

Development of the organic market in selected countries 2004-2011



Organic data collection systems world-wide 2011 for data on area, operators and production (total 162 countries)

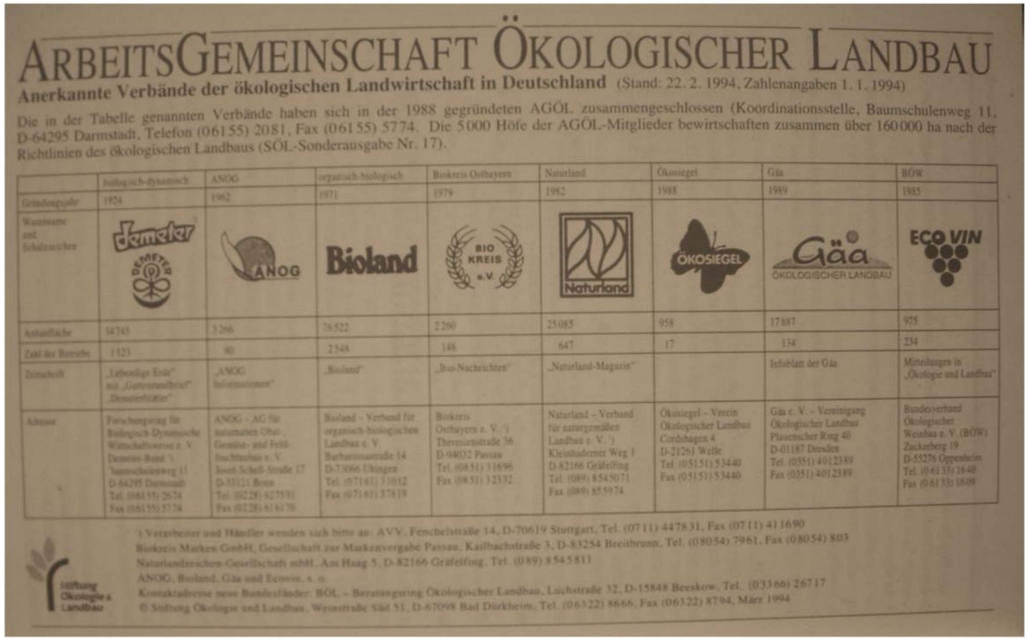


- Government collection systems (70 countries)
  - Data from the certifiers
  - Census/farm structure survey
  - Direct payments
- Private collection systems (35 countries)
  - Data from the certifiers
  - Company data
- No collection system (55 countries)
  - FiBL and IFOAM collect the data from the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

Source: FiBL and IFOAM 2013

1980s: Data collection begins

- **Private sector institutions** (mainly in Europe and North America) begin to collect data on organic agriculture on a country level (area totals and number of producers). The data are based on membership in the producer/sector organisations.



ARBEITSGEMEINSCHAFT ÖKOLOGISCHER LANDBAU

Anerkannte Verbände der ökologischen Landwirtschaft in Deutschland (Stand: 22. 2. 1994, Zahlenangaben 1. 1. 1994)

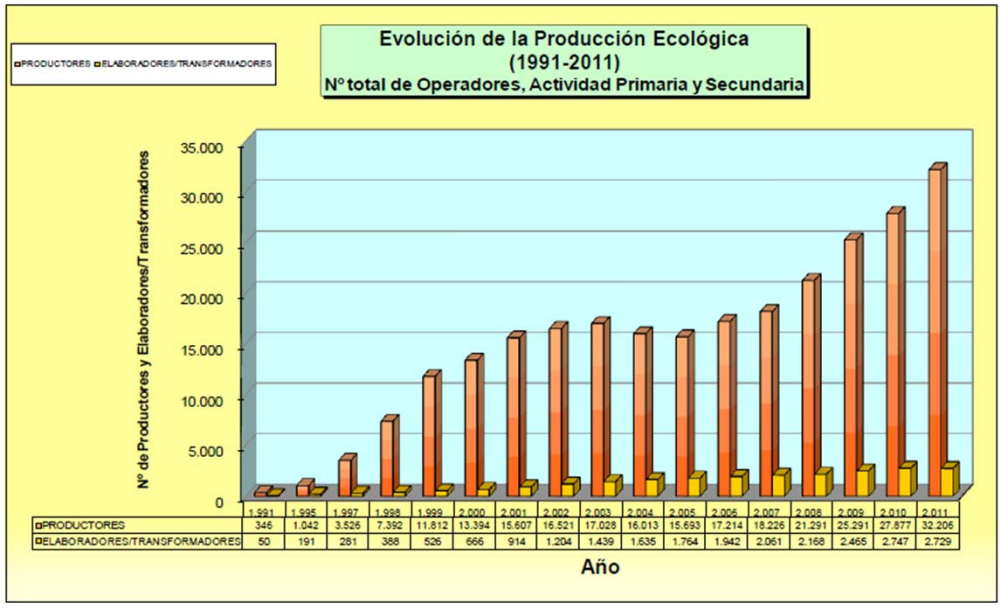
Die in der Tabelle genannten Verbände haben sich in der 1988 gegründeten AGÖL zusammengeschlossen (Koordinationsstelle, Baumschulenweg 11, D-64295 Darmstadt, Telefon (06155) 2081, Fax (06155) 5774. Die 5000 Höfe der AGÖL-Mitglieder bewirtschaften zusammen über 160000 ha nach der Richtlinien des ökologischen Landbaus (SÖL-Sonderausgabe Nr. 17).

	biologisch-dynamisch	ANOG	organisch-biologisch	Biokreis Ostbayern	Naturland	Ökosiegel	Gäa	BÖW
Gründungsjahr	1924	1962	1971	1979	1982	1988	1989	1985
Warenname und Schutzzeichen	demeter	ANOG	Bioland	BIO KREIS e.V.	Naturland	ÖKOSIEGEL	Gäa ÖKOLOGISCHER LANDBAU	ECO VIN
Anbaufläche	34745	3266	76522	2260	25085	958	17887	975
Zahl der Betriebe	1123	90	2548	148	647	17	134	234
Zeitschrift	„Lebendige Erde" mit „Gartenrundbrief" „Demeterblätter"	„ANOG Informationen"	„Bioland"	„Bio-Nachrichten"	„Naturland-Magazin"		Infoblatt der Gäa	Mitteilungen in „Ökologie und Landbau"
Adresse	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

1994: Start of official data collection in all EU countries

1994: With the implementation **of EU regulation on organic agriculture** many EU countries start governmental data collection (area, producers), based on the data of the accredited certifiers.

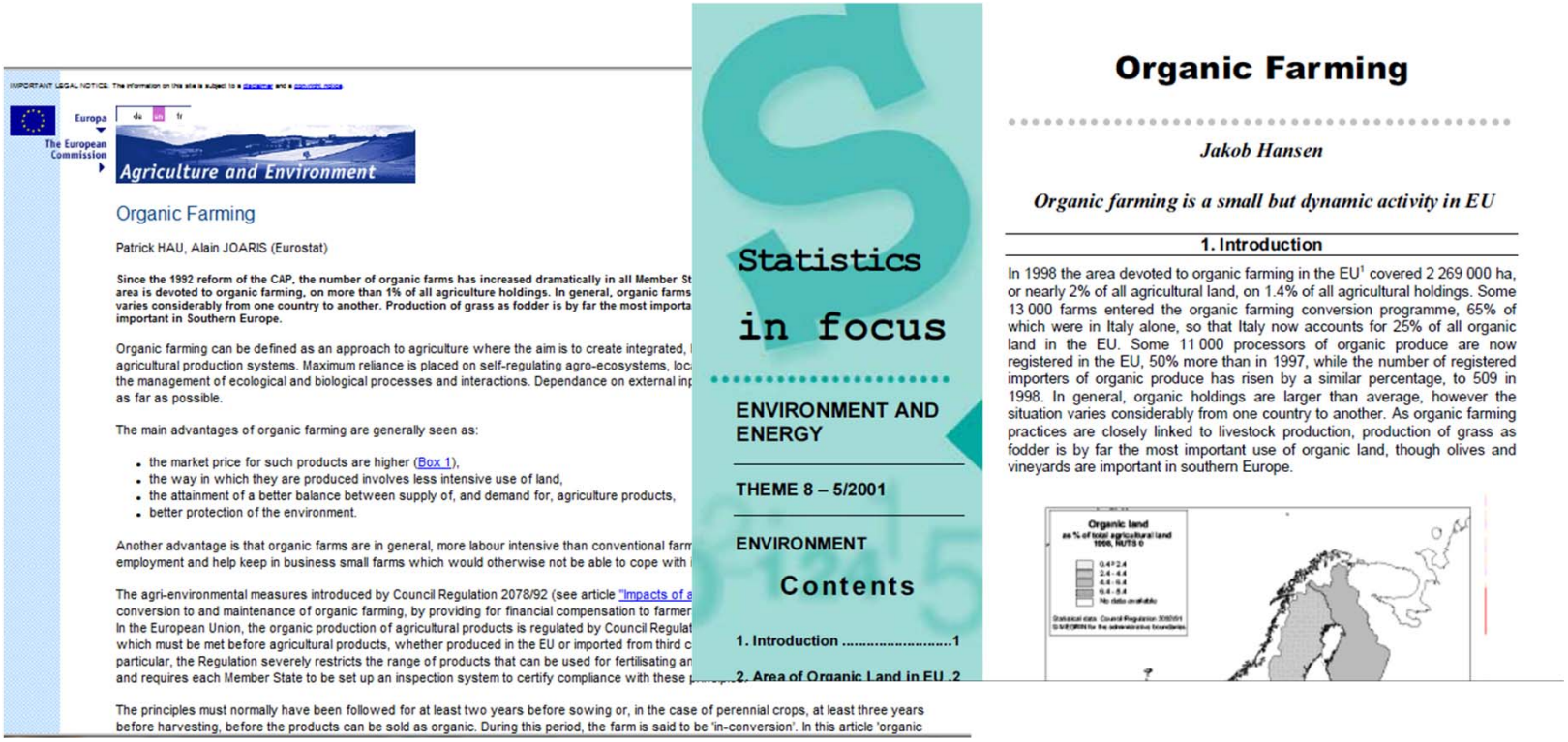
Estadísticas 2011. Producción Ecológica – España -



	1.991	1.995	1.997	1.998	1.999	2.000	2.001	2.002	2.003	2.004	2.005	2.006	2.007	2.008	2.009	2.010	2.011
PRODUCTORES	346	1.042	3.526	7.392	11.812	13.394	15.607	16.521	17.028	16.013	15.693	17.214	18.226	21.291	25.291	27.877	32.206
ELABORADORES/TRANSFORMADORES	50	191	281	388	526	666	914	1.204	1.439	1.635	1.764	1.942	2.061	2.168	2.465	2.747	2.729

1997: Eurostat starts ist data collection

1997: **Eurostat** begins to compile the official data provided by the member states: area and producers. The types of data collected have increased substantially since then.



Europa
The European Commission

Agriculture and Environment

Organic Farming

Patrick HAU, Alain JOARIS (Eurostat)

Since the 1992 reform of the CAP, the number of organic farms has increased dramatically in all Member St area is devoted to organic farming, on more than 1% of all agriculture holdings. In general, organic farms varies considerably from one country to another. Production of grass as fodder is by far the most importa important in Southern Europe.

Organic farming can be defined as an approach to agriculture where the aim is to create integrated, agricultural production systems. Maximum reliance is placed on self-regulating agro-ecosystems, loc the management of ecological and biological processes and interactions. Dependance on external inp as far as possible.

The main advantages of organic farming are generally seen as:

- the market price for such products are higher (Box 1),
- the way in which they are produced involves less intensive use of land,
- the attainment of a better balance between supply of, and demand for, agriculture products,
- better protection of the environment.

Another advantage is that organic farms are in general, more labour intensive than conventional farm employment and help keep in business small farms which would otherwise not be able to cope with

The agri-environmental measures introduced by Council Regulation 2078/92 (see article "Impacts of a conversion to and maintenance of organic farming, by providing for financial compensation to farmer In the European Union, the organic production of agricultural products is regulated by Council Regulat which must be met before agricultural products, whether produced in the EU or imported from third c particular, the Regulation severely restricts the range of products that can be used for fertilisating ar and requires each Member State to be set up an inspection system to certify compliance with these

The principles must normally have been followed for at least two years before sowing or, in the case of perennial crops, at least three years before harvesting, before the products can be sold as organic. During this period, the farm is said to be 'in-conversion'. In this article 'organic

Statistics in focus

ENVIRONMENT AND ENERGY

THEME 8 – 5/2001

ENVIRONMENT

Contents

1. Introduction 1

2. Area of Organic Land in EU .2

Organic Farming

Jakob Hansen

Organic farming is a small but dynamic activity in EU

1. Introduction

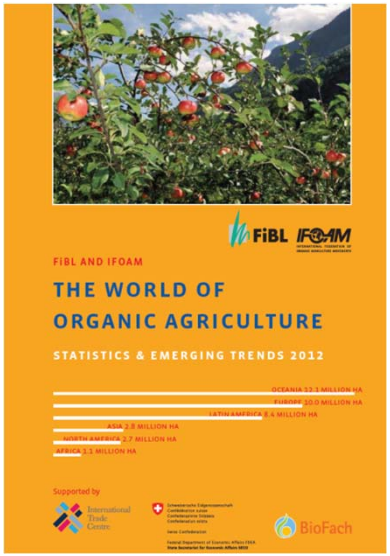
In 1998 the area devoted to organic farming in the EU[1] covered 2 269 000 ha, or nearly 2% of all agricultural land, on 1.4% of all agricultural holdings. Some 13 000 farms entered the organic farming conversion programme, 65% of which were in Italy alone, so that Italy now accounts for 25% of all organic land in the EU. Some 11 000 processors of organic produce are now registered in the EU, 50% more than in 1997, while the number of registered importers of organic produce has risen by a similar percentage, to 509 in 1998. In general, organic holdings are larger than average, however the situation varies considerably from one country to another. As organic farming practices are closely linked to livestock production, production of grass as fodder is by far the most important use of organic land, though olives and vineyards are important in southern Europe.

End 1990s: collection of market data begins

- End of 1990s: First countries begin to collect market and trade data (mainly domestic market). These activities are mainly carried out by the private sector. In 2000 a first study is released in the framework of the European OMIARD project, covering a number of European countries
- ITC, the International Trade Centre releases a study with global market data.

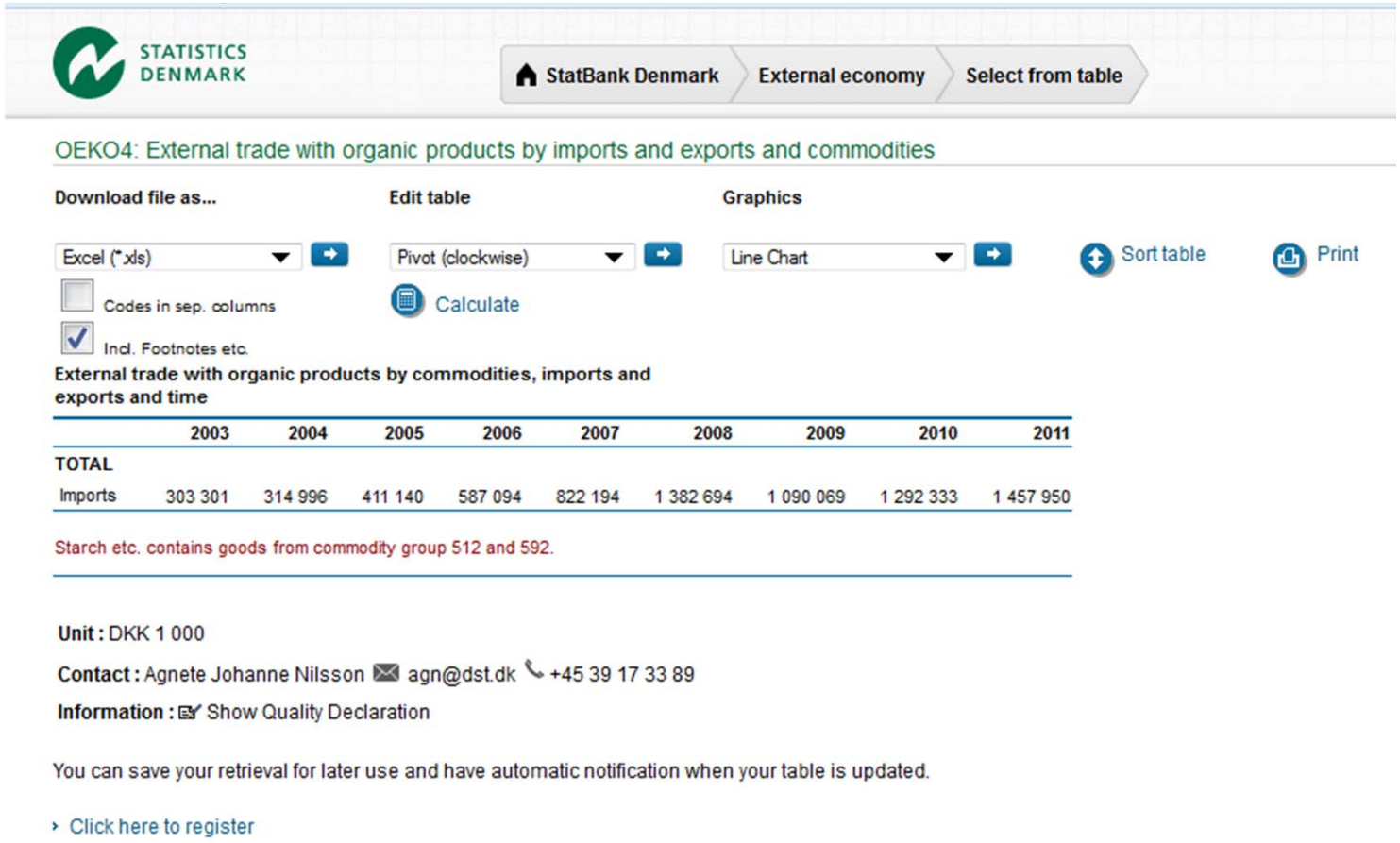
1999: Data collection on organic agriculture worldwide starts

› BioFach asks the German Foundation Ecology & Agriculture (SÖL) to provide data on organic agriculture worldwide. Until today data collection is carried out by FiBL in cooperation with IFOAM with funding from BioFach.



Area, producers, markets – the ten leading countries 2011

2003: Denmark begins to collect external trade and domestic market data



STATISTICS DENMARK

StatBank Denmark › External economy › Select from table

OEKO4: External trade with organic products by imports and exports and commodities

Download file as... Edit table Graphics

Excel (*.xls) Pivot (clockwise) Line Chart Sort table Print

Codes in sep. columns Calculate

Incl. Footnotes etc.

External trade with organic products by commodities, imports and exports and time

	2003	2004	2005	2006	2007	2008	2009	2010	2011
TOTAL									
Imports	303 301	314 996	411 140	587 094	822 194	1 382 694	1 090 069	1 292 333	1 457 950

Starch etc. contains goods from commodity group 512 and 592.

Unit : DKK 1 000

Contact : Agnete Johanne Nilsson agn@dst.dk +45 39 17 33 89

Information : Show Quality Declaration

You can save your retrieval for later use and have automatic notification when your table is updated.

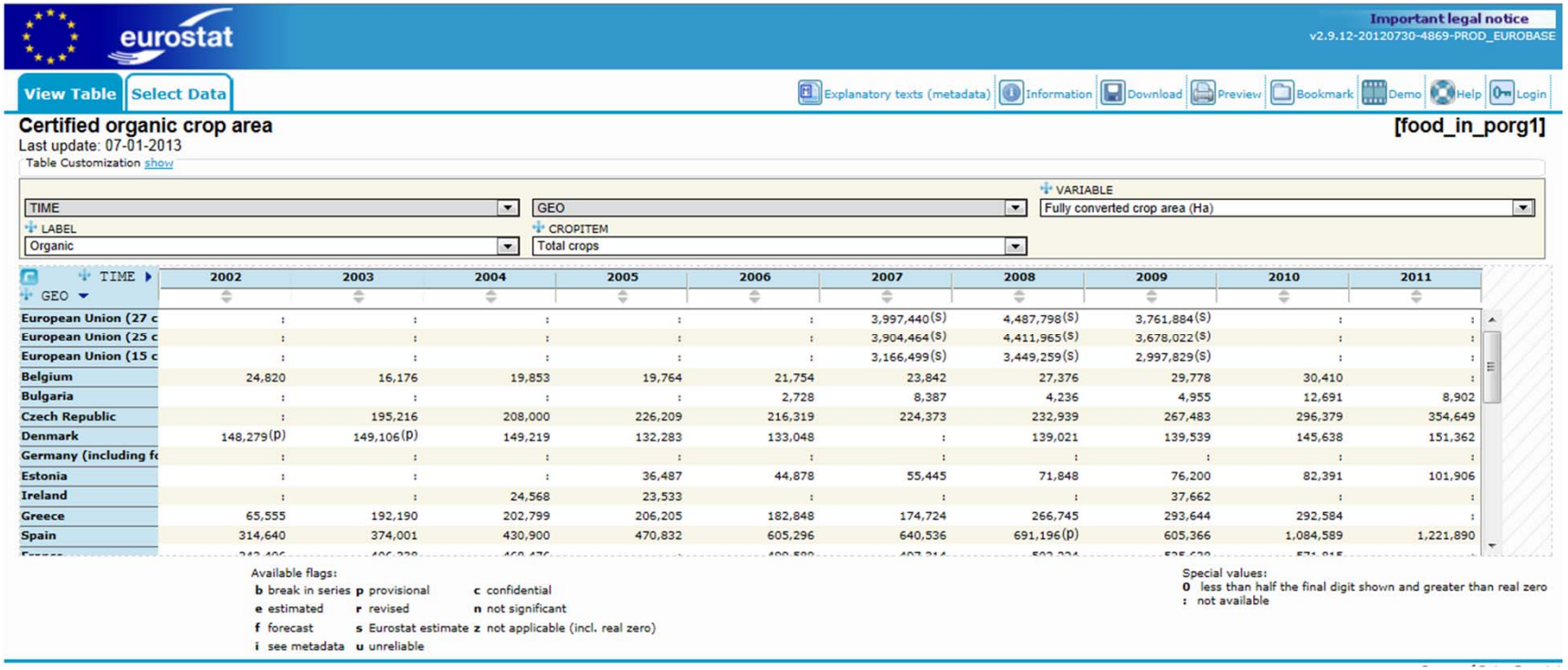
› Click here to register

2004: EISfOM Starts

- 2004: Beginning of the European EISfOM project (European Information System for Organic Market Data). Recommendations include to set up a centralized point for data collection, including market data.

2005: Data tables at the Eurostat website

› 2005: **Eurostat** provides data collected among member states on its website with a dynamic data table.



eurostat

Important legal notice
v2.9.12-20120730-4869-PROD_EUROBASE

View Table | Select Data

Explanatory texts (metadata) | Information | Download | Preview | Bookmark | Demo | Help | Login

Certified organic crop area [food_in_porg1]

Last update: 07-01-2013

Table Customization show

TIME | GEO | VARIABLE: Fully converted crop area (Ha)

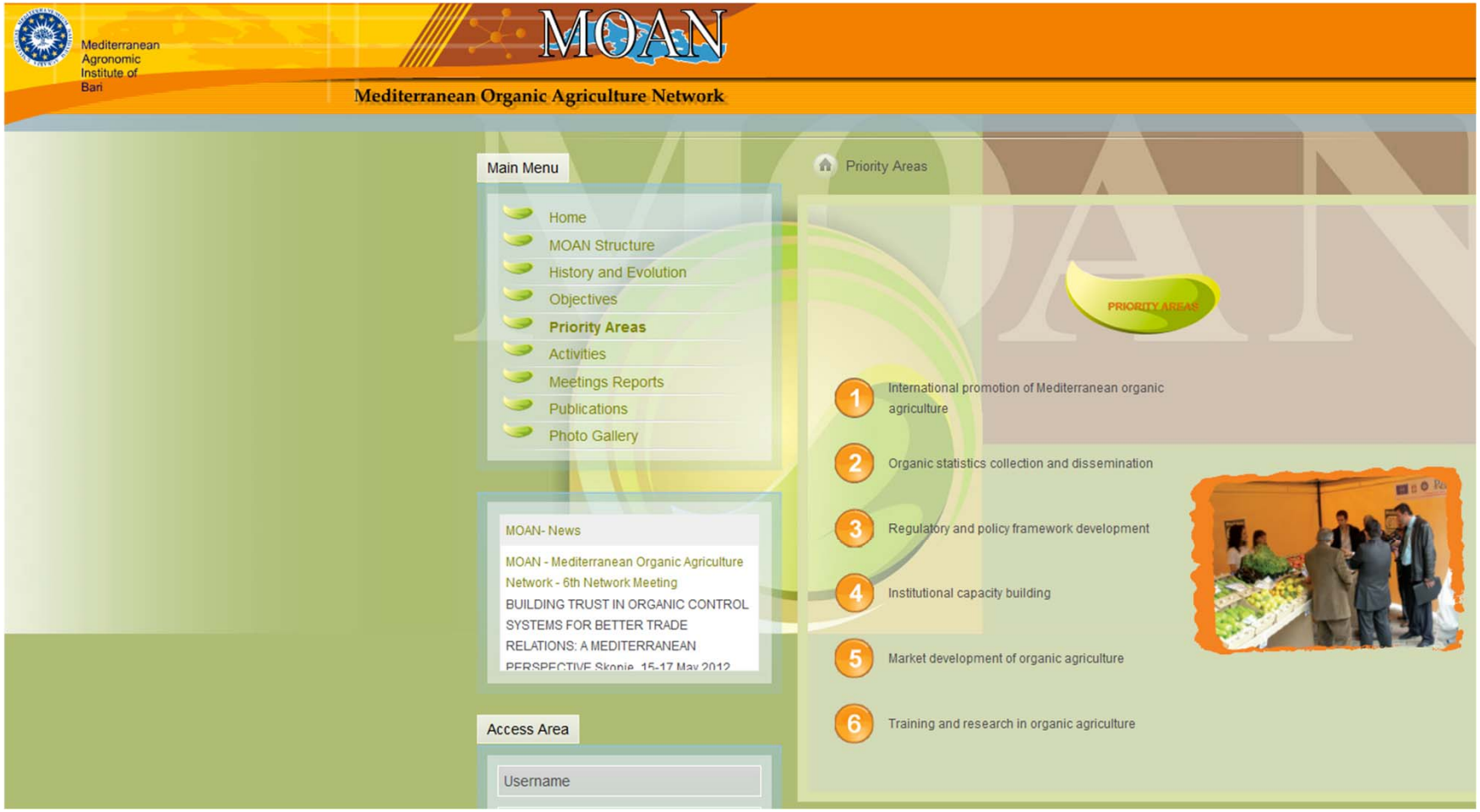
LABEL: Organic | CROPITEM: Total crops

TIME / GEO	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
European Union (27 c	:	:	:	:	:	3,997,440(S)	4,487,798(S)	3,761,884(S)	:	:
European Union (25 c	:	:	:	:	:	3,904,464(S)	4,411,965(S)	3,678,022(S)	:	:
European Union (15 c	:	:	:	:	:	3,166,499(S)	3,449,259(S)	2,997,829(S)	:	:
Belgium	24,820	16,176	19,853	19,764	21,754	23,842	27,376	29,778	30,410	:
Bulgaria	:	:	:	:	2,728	8,387	4,236	4,955	12,691	8,902
Czech Republic	:	195,216	208,000	226,209	216,319	224,373	232,939	267,483	296,379	354,649
Denmark	148,279(p)	149,106(p)	149,219	132,283	133,048	:	139,021	139,539	145,638	151,362
Germany (including fo	:	:	:	:	:	:	:	:	:	:
Estonia	:	:	:	36,487	44,878	55,445	71,848	76,200	82,391	101,906
Ireland	:	:	24,568	23,533	:	:	:	37,662	:	:
Greece	65,555	192,190	202,799	206,205	182,848	174,724	266,745	293,644	292,584	:
Spain	314,640	374,001	430,900	470,832	605,296	640,536	691,196(p)	605,366	1,084,589	1,221,890

Available flags:
b break in series | p provisional | c confidential
e estimated | r revised | n not significant
f forecast | s Eurostat estimate | z not applicable (incl. real zero)
i see metadata | u unreliable

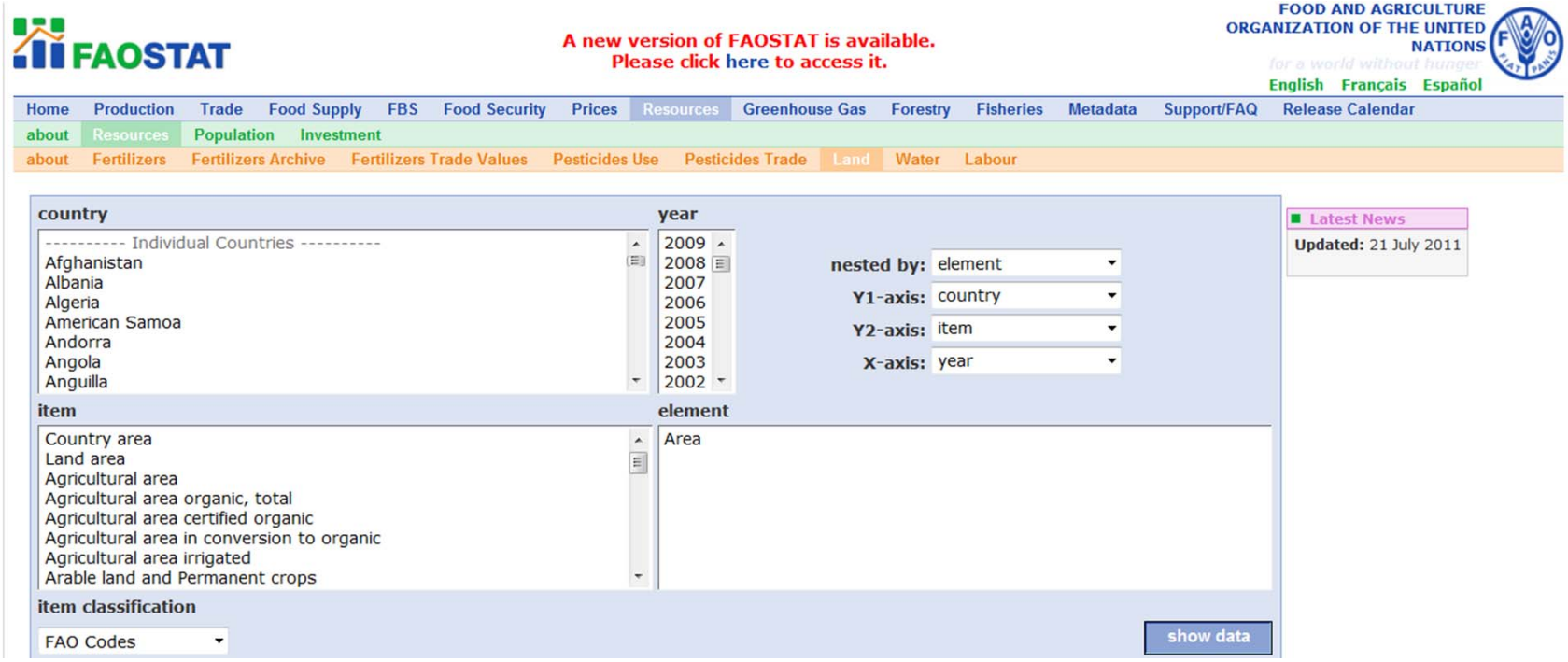
Special values:
0 less than half the final digit shown and greater than real zero
: not available

2006: Mediterranean Organic Agriculture Network starts to coordinate data collectionsince among ist member states



2010: FAOSTAT

› 2010: FAOSTAT includes organic farming in ist annual survey on land use on organic agriculture worldwide. It includes the FiBL-IFOAM data into ist Resources database.



2010: RUTA starts to coordinate data collection in Central America

› The network for Rural Development in central America (RUTA) begins joint data collection with FiBL-IFOAM

2012: FAO Statistical Yearbook: Includes organic farming data in 2012

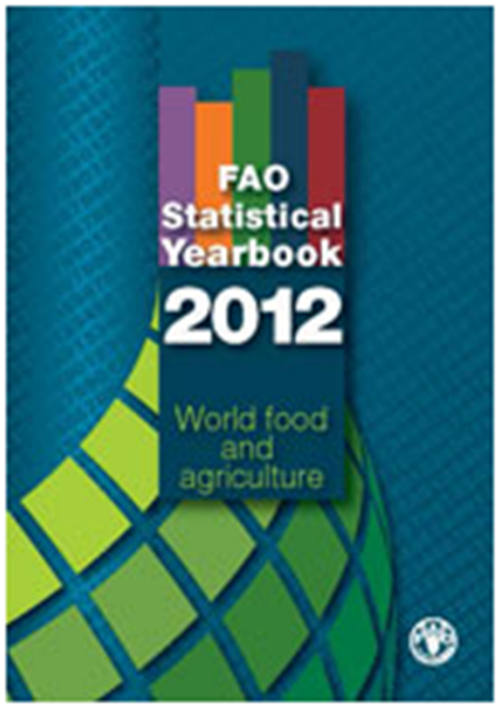
PART 4

Organic farming

Organic agriculture is a production management system that aims to promote and enhance ecosystem health, including biological cycles and soil biological activity. It is based on minimizing the use of external inputs, and represents a deliberate attempt to make the best use of local natural resources. Methods are used to minimize pollution of air, soil and water. Organic agriculture comprises a range of land, crop and animal management procedures, circumscribed by a set of rules and limits usually enforced by inspection and certification mechanisms. Synthetic pesticides, mineral fertilizers, synthetic preservatives, pharmaceuticals, Genetically Modified Organisms (GMOs), sewage sludge and irradiation are prohibited in all organic standards.

Growth rates of land under organic management in Western Europe, Latin America and the Caribbean, and the United States of America have been impressive despite low-base beginnings and the reclassification of land. Between 1995 and 2010, the combined area of organic cultivation tripled to 38 million hectares. A number of industrial countries have action plans for developing organic agriculture. Targets are set for the sector's growth and resources are allocated to compensate farmers during, and sometimes after, the conversion period, and also to support research and extension in organic agriculture.

Organic practices that encourage soil biological activity and nutrient cycling include: manipulating crop rotations and strip cropping; green manuring and organic fertilization (animal manure, compost, crop residues), minimum tillage or zero tillage and avoidance of pesticide and herbicide use. Research indicates that organic agriculture significantly increases the density of beneficial invertebrates, earthworms, root symbionts and other



2012: OrganicDataNetwork

- Funded under the 7th Framework Programme for Research and Technological Development
- Running 2012-2014
- Coordinator: Prof. Dr. Raffaele Zanoli, University of Ancona
- AIM: **The OrganicDataNetwork project aims to increase the transparency of the European market for organic food through better availability of market intelligence about the European organic sector in order to meet the needs of policy makers and market actors.**

The OrganicDataNetwork project will:

- provide an overview of all relevant public and private organic data collectors;
- collect currently available data on organic markets in Europe, and produce a European database after having checked their reliability and consistency;
- develop a set of practical recommendations on data collection and dissemination (Code of Practice and a manual);
- improve the availability and the quality of published market reports on the organic sector in a number of case study countries;
- lay the foundations for a long-term collaboration on organic market data collection.

Germany: «Working Group Organic Market» - Data collection linked to data dissemination

BOLW
Bund Ökologische Lebensmittelwirtschaft

Umsätze und Umsatzanteile für Bio-Lebensmittel in Deutschland

	Umsätze 2011 in Mrd. €	Anteil 2011 gerundet	Umsätze 2012 in Mrd. €
Naturkostfach-geschäfte	2,07	31%	2,21
Lebensmittel-einzelhandel	3,32	50%	3,52
Sonstige	1,35	19%	1,40
Insgesamt	6,64		7,04

6%

Quelle: Arbeitskreis Biomarkt auf Basis von GfK, Nielsen, Klaus Braun Kommunikationsberatung und BNN

Sucessful national data networks

- Work together on the data collection (e.g. Germany, France, Switzerland)
- Publish the data annually to show the sectors performance.
- Point of time of publication/presentation is known (Germany: BïoFach; Switzerland: Media event in March)
- Good PR work (media conference, press releases)
- Attractive, compact brochure

Conclusion

- In many countries, particulary in Europe, national networks exist that give good access to existing national market data related to organic agriculture.
- However, on an regional and international level, such activities are scarce even though FiBL and AMI have been providing market data (national totals) in the framework of the FIBL-IFOAM global statistics.
- The Eurostat database and network as well as the FAOSTAT database are promising developments, but do not yet focus on market data.
- Therefore, the OrganicDataNetwork activities are important to show ways how and international platform for organic market data can be set up.

The World of Organic Agriculture 2013

- 14th edition of The World of Organic Agriculture
- Is available at the FiBL and the IFOAM booths (Hall 1, Stands 150 and 240). There is a discount for IFOAM members
- After BioFach the book can be bought at the FiBL and (shop.fibl.org) IFOAM webshops www.ifoam.org.
- Presentations, key data and background is available at www.organic-world.net/yearbook-2013.html.