Upscaling potential of Organic farming to enhance resilience and contribute sustainability in the drylands

Thünen-Institute, Germany
# Key indicators of Organic Agriculture 2018

<table>
<thead>
<tr>
<th>Indicator</th>
<th>World</th>
<th>Top countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Countries with organic activities(^1)</td>
<td>2018: 186 countries</td>
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<tr>
<td>Organic agricultural land</td>
<td>2018: 71.5 million hectares (1999: 11 million hectares)</td>
<td>Australia (35.7 million hectares)</td>
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<td></td>
<td></td>
<td>Argentina (3.6 million hectares)</td>
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<td></td>
<td></td>
<td>China (3.1 million hectares)</td>
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<tr>
<td>Organic share of total agricultural land</td>
<td>2018: 1.5 %</td>
<td>Liechtenstein (38.5 %)</td>
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<td></td>
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<td>Samoa (34.5 %)</td>
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<td></td>
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<td>Austria (24.7 %)</td>
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<td>Wild collection and further non-agricultural areas</td>
<td>2018: 35.7 million hectares (1999: 4.1 million hectares)</td>
<td>Finland (11.3 million hectares)</td>
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<td></td>
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<td>Zambia (3.2 million hectares)</td>
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<td></td>
<td></td>
<td>Tanzania (2.4 million hectares)</td>
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<tr>
<td>Producers</td>
<td>2018: 2.8 million producers (1999: 200'000 producers)</td>
<td>India (1'149'371)</td>
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<td></td>
<td></td>
<td>Uganda (2'103'52)</td>
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<td></td>
<td></td>
<td>Ethiopia (203'602)</td>
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<tr>
<td>Organic market(^2)</td>
<td>2018: 96.7 billion euros (2000: 15.1 billion euros)</td>
<td>US (40.6 billion euros)</td>
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<td></td>
<td></td>
<td>Germany (10.9 billion euros)</td>
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<td></td>
<td></td>
<td>France (9.1 billion euros)</td>
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<tr>
<td>Per capita consumption</td>
<td>2018: 12.8 euros</td>
<td>Switzerland (312 euros)</td>
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<td></td>
<td></td>
<td>Denmark (312 euros)</td>
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<td></td>
<td></td>
<td>Sweden (231 euros)</td>
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<tr>
<td>Number of countries with organic regulations</td>
<td>2018: 103 countries</td>
<td></td>
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<tr>
<td>Number of affiliates of IFOAM – Organics International</td>
<td>2018: 779 affiliates from 110 countries</td>
<td>Germany - 79 affiliates</td>
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<tr>
<td></td>
<td></td>
<td>India - 55 affiliates</td>
</tr>
<tr>
<td></td>
<td></td>
<td>China - 45 affiliates</td>
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<td></td>
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<td>United States - 48 affiliates</td>
</tr>
</tbody>
</table>

Source: FiBL survey 2020, based on national data sources and data from certifiers
Key indicators organic agriculture 2018

Organic Farmland 2018
- 3.3 m ha North America
- 15.6 m ha Europe
- 6.5 m ha Asia
- 2.0 m ha Africa
- 36.0 m ha Oceania

Organic Producers 2018
- 2.8 million Organic farmers
- The number of organic producers is increasing
- +55% From 2009
- 71.5 m ha Organic farmland in million hectares
- +2.9% From 2017
- 186 Countries with organic farming

Organic Market 2018
- Almost 97 Global organic food market in billion euros
- Top 3 countries (market in billion euros)
  - USA: 40.6
  - Germany: 10.9
  - France: 9.1

Top 3 countries (land in million of hectares)
- Australia: 35.6
- Argentina: 3.6
- China: 3.1

Number of producers: Top 3 countries
- India: 210'352
- Uganda: 203'602
- Ethiopia: 1'149'371

Source: FiBL survey based on national sources
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More information: www.organicworld.net - statistics.fibl.org

15.4% Organic market growth
11.5% Market share
312 € Highest per capita spending is in Denmark and Switzerland
Organic Farming in dry areas (e.g. Australia) successful.

50% of organic agriculture is done on semi-arid grassland
(67% grassland total; 48 mio ha)
### SWOT Organic Production

<table>
<thead>
<tr>
<th><strong>Strengths:</strong></th>
<th><strong>Weaknesses:</strong></th>
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<tbody>
<tr>
<td>• Sustainable with principles</td>
<td>• High process and product standards</td>
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<tr>
<td>• Adaptive agro-ecological and socio-economic conditions (proven practise)</td>
<td>• Special skills necessary</td>
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<tr>
<td>• Global regulated premium market</td>
<td>• Certification with inspection</td>
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<tr>
<td>• Product chain from farm - fork</td>
<td>• Relevant mainly in developed agriculture and Western countries</td>
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<tr>
<th><strong>Opportunities:</strong></th>
<th><strong>Threats:</strong></th>
</tr>
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<tbody>
<tr>
<td>• Attractive for low-external-input and small-scale farming</td>
<td>• Lack in knowledge and skills throughout the chain</td>
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<tr>
<td>• Growing world market</td>
<td>• Market access for remote areas</td>
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<td></td>
<td>• Regulatory deficits and competition</td>
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</tbody>
</table>
### SWOT Scaling-up Organic Production in dryland areas (permanent grassland)

#### Strengths:
- Low-external-input grazing systems
- Added value to ruminant production
- Suitable for small- and large scale farming
- Protected premium market

#### Weaknesses:
- Organic livestock products have high hygienic and specific ethic standards
- Sophisticated standards and markets
- Food sovereignty vs. global market

#### Opportunities:
- New markets for organic meat
- Increase sustainable utilization of permanent grassland
- Cross-over impact to conventional farming (and vis-a-versa)

#### Threats:
- Low knowledge and skills
- Trade barriers
- Lack in regulations and certification
- Competition
German supported
Knowledge Centres Organic Agriculture in Africa

**KCOA**
- **West:** Senegal, Benin, Gambia, Mali, Nigeria
- **East:** Uganda, Kenya, Rwanda, Tanzania
- **South:** Zambia, Namibia, South Africa, Malawi
- **North:** Egypt, Morocco, Tunisia
- Cooperation and synergies with Ecological Organic Agriculture Initiative (EOA-I) / AU
- Digital knowledge platform on continental level with region specific sections
- Multipliers = main users of platform
- Networking, training / ToToT on ecological organic agriculture

- Project implementation period: 01/2019 – 06/2024
- Budget: 16.000.000 EUR
Examples for governmental actions

- National regulation for Organic production
- Support for market development (domestic, abroad)
- Training and education on „Good Organic Farming Production“
- Implementation of national inspection and certification bodies
- Give farmers, processors and traders market transparency
- Production integrity and transparency
Conclusion

• Organic production and marketing is a global success story.
• Organic production is an opportunity for:
  • dryland areas throughout the world, especially permanent grassland systems
  • Low-external-input farming systems
  • Small- and large scale farming
  • Developed and less developed countries/regions
• Organic production needs governmental support in:
  • Regulation, certification
  • Training and education
  • Market development and access