



FOCUS OIV
THE WORLD ORGANIC
VINEYARD





INTRODUCTION 4

**1 • ORGANIC VITICULTURE:
CONTEXT, DEFINITION AND REGULATION** 5

- 1.1 Principles of organic viticulture 5
- 1.2 Regulations on organic production 7
- 1.3 Certification of organic viticultural products 7

**2 • DISTRIBUTION AND EVOLUTION
OF ORGANIC VINEYARDS** 10

- 2.1 Methodology 10
- 2.2 Distribution and evolution of the world's organic vineyards 11
- 2.3 Evolution of organic vineyards by country 13
 - 2.3.1 Europe 13
 - 2.3.2 Asia 16
 - 2.3.3 North America and South America 17
 - 2.3.4 Oceania 19
 - 2.3.5 Africa 20



Table of figures

Figure 1. Principles of organic vitiviniculture according to Resolution OIV-ECO 460-2012	6
Figure 2. Technical principles of organic viticulture and organic winemaking in the EU	6
Figure 3. Overview of regulatory framework for organic certification in vitiviniculture	7
Figure 4. Overview of the world's organic vineyards in 2019	11
Figure 5. Evolution of world area under organic vines	11
Figure 6. Share of organic viticulture in total world viticulture	11
Figure 7. Distribution of world area under organic vines in 2019	12
Figure 8. Top 10 countries by area under organic vines in 2019	12
Figure 9. Top 10 countries by area under organic vines as % of total area under vines in 2019	12
Figure 10. Top 10 countries by average annual growth rate of area under organic vines over the period 2014–2019	13

Abbreviations

ha: hectares

kha: thousands of hectares



Introduction

Organic viticulture is a production method that underwent significant expansion at the end of the 20th century and has continued to grow ever since. This development can be explained in large part by societal issues, particularly in relation to consumer health and environmental protection. In response, there has been a surge in organic vine surface areas across the world, combined with a strong trend towards certification.

This report surveys the development of certified organic vineyard areas producing wine grapes, table grapes and raisins, covering the period 2005 to 2019¹. The overall objective of this report is to carry out exploratory work that contributes to knowledge on organic viticulture, a production method used in the vitivincultural industry. It will then be possible, based on this preliminary study, to continue to monitor and explain the evolution of organically cultivated and certified vineyard areas in the future using a more specific approach, in particular by separating areas under vines according to the destination of the grapes produced. A specific feature of this report is to collect and collate data on all vineyard areas considered as organic, recognising that definitions vary from one country to another.

This report is divided into two chapters. The first chapter establishes a general framework and defines the principles of certified organic vitivinculture. The second presents data on certified organic vine surface areas by country and at the global level in 2019, and also tracks developments over a 15-year period.

¹. For more information on the methodology used, see Chapter 2.1.



1 • ORGANIC VITICULTURE: CONTEXT, DEFINITION AND REGULATION

1.1 Principles of organic viticulture

Between the 19th and 20th centuries, the theorisation of **organic agriculture** emerged internationally from a series of scientific and political contributions in reaction to the consequences of agricultural industrialisation. In terms of recognition by countries, the global pioneers were the United States (state of Oregon in 1974 and California in 1979) and France (in 1983), which were the first to legislate on organic agriculture¹. In the countries which are now in the European Union (EU), marketing through collective brands began in the 1960s, but recognition by the public authorities only occurred in 1981, and the first regulations were introduced in 1991.

In 1980, the International Federation of Organic Agriculture (IFOAM), founded in 1972, formulated the first version of the IFOAM Basic Standards (IBS), which are reviewed every two years. The IBS serve as guidelines, on the basis of which public and private standard-setting bodies can develop their specific organic production standards.

Much work has been done, and is still being done, to harmonise the definition and practices of organic agriculture at the international level, by producer federations but also by governments within the framework of multilateral discussions led by intergovernmental organisations.

The first intergovernmental harmonisation on organic agriculture dates back to 1999, when the Codex Alimentarius Commission adopted the Guidelines for the Production, Processing, Labelling and Marketing of Organically Produced Foods². They define organic agriculture as a holistic production management system that avoids the use of synthetic fertilisers and pesticides and genetically modified organisms; minimises pollution of air, soil and water; and optimises the health and productivity of interdependent communities of soil life, plants, animals and people.

The Codex Alimentarius Guidelines provide the framework for an agreed approach to the requirements that underpin the production of food by organic methods, as well as the labelling and claims of these products.

The following provisions concern product indications: 'A product will be regarded as bearing indications referring to organic production methods where, in the labelling or claims, including advertising material or commercial documents, the product, or its ingredients, is described by the terms "organic", "biodynamic", "biological", "ecological", or words of similar intent including diminutives which, in the country where the product is placed on the market, suggests to the purchaser that the product or its ingredients were obtained according to organic production methods.'

With regard to the vitivincultural sector, discussions within the OIV concluded in 2012 with the adoption of the resolution on the General Principles of Organic Vitivinculture (OIV-ECO 460-2012). These recommendations, illustrated in Figure 1, take into account the specificities of the vitivincultural sector.



1. Morgera, E., Bullón Caro, C. and Marín Durán, G. (2012) Organic agriculture and the law. Rome: Food and Agriculture Organization of the United Nations (FAO legislative study, 107).

2. CAC/GL 32-1999, 'Guidelines for the Production, Processing, Labelling and Marketing of Organically Produced Foods'.



According to Resolution OIV-ECO 460-2012, **organic vitiviniculture** is a production system that:

- Seeks to maintain ecosystems and the fertility of soils in the long term,
- Seeks to increase biodiversity and the protection of natural resources,
- Seeks to promote the use of ecological processes and cycles,
- Seeks to minimise or eliminate external interventions and viticultural practices that require the use of chemical synthesis products,
- Seeks to use organic products and processes in transformation and production processes, trying to avoid all techniques that have a considerable negative impact on the environment,
- Excludes the use of genetically modified organisms and inputs derived from genetically modified organisms.

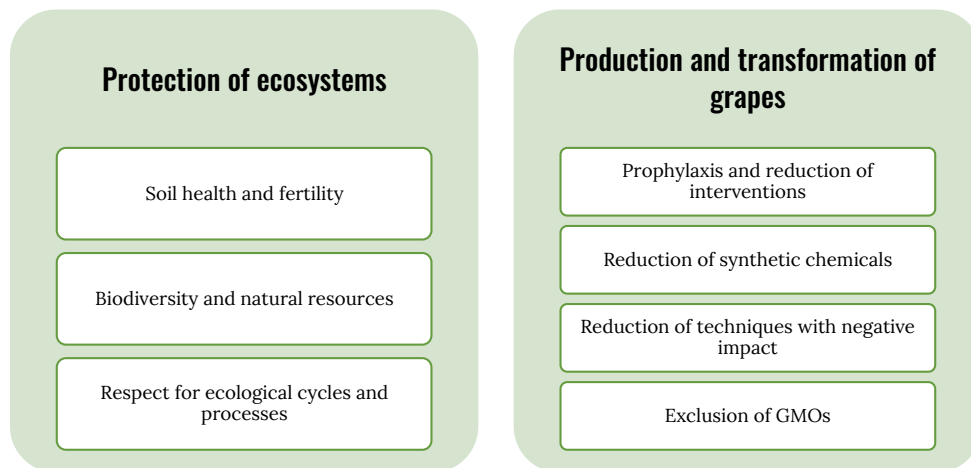


Figure 1. Principles of organic vitiviniculture according to Resolution OIV-ECO 460-2012

Under Resolution OIV-ECO 460-2012, organic viticulture is based on three principles: soil fertility, maintaining biodiversity, and pest control in accordance with ecological cycles and processes. These principles can be applied in different ways. Figure 2 shows the technical principles adopted by the EU¹. Organic winemaking, where regulations exist, is broken down into positive lists of permitted practices and inputs, as shown in Figure 2. This production method therefore requires extra vigilance at each stage of the production or transformation process, as the operator has access to a reduced number of solutions and these restrictions may leave some sensitivity in the plant or processed product. Additionally, this method of cultivation often leads to lower yields, particularly as the only permitted fertilisers are of natural or organic origin.

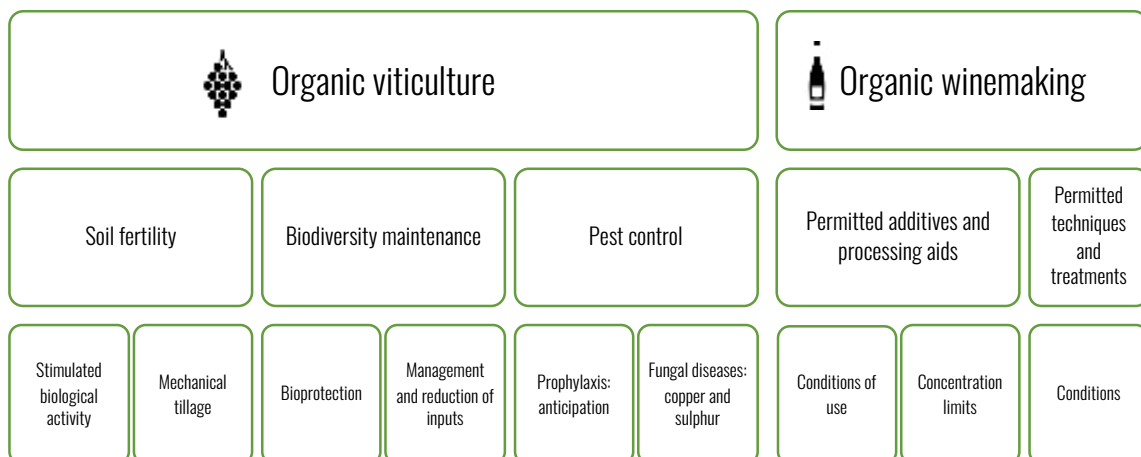


Figure 2. Technical principles of organic viticulture and organic winemaking in EU

¹ Council Regulation (EC) No 834/2007 on organic production and labelling of organic products and Regulation (EU) No 203/2012 on organic wine.

1.2 Regulations on organic production

The principles set out in the above guidelines or standards are translated into regulations on organic agriculture, or more specifically organic vitiviniculture, at national or supra-national level.

Depending on the country, regulations on organic production may set rules only for grape production in the vineyard, or may extend to the practices and products permitted for the processing and marketing of organic viticultural products. Regulations and specifications have evolved considerably over the last few decades, and they continue to do so in order to specify practices, both in the vineyard and in the processing of vine products.

In 2019, 93 countries had specific regulations for organic agriculture and 16 were in the process of drafting such regulations¹. Of the 63 countries surveyed in this report, 56 have regulations for the production, processing and labelling of organic products, and 7 are in the process of drafting and implementing regulations (Algeria, Egypt, Jordan, Kyrgyzstan, New Zealand, South Africa and Uzbekistan).

1.3 Certification of organic viticultural products

Certification² assesses the conformity of the production method of organically grown grapes or grape products. It is a way of guaranteeing to consumers that the production conditions stipulated in the specifications have been complied with and of informing them of the approach and practices of producers through recognisable labels and logos. Certifications can be issued for a single reference standard or may combine several depending on the export destination.

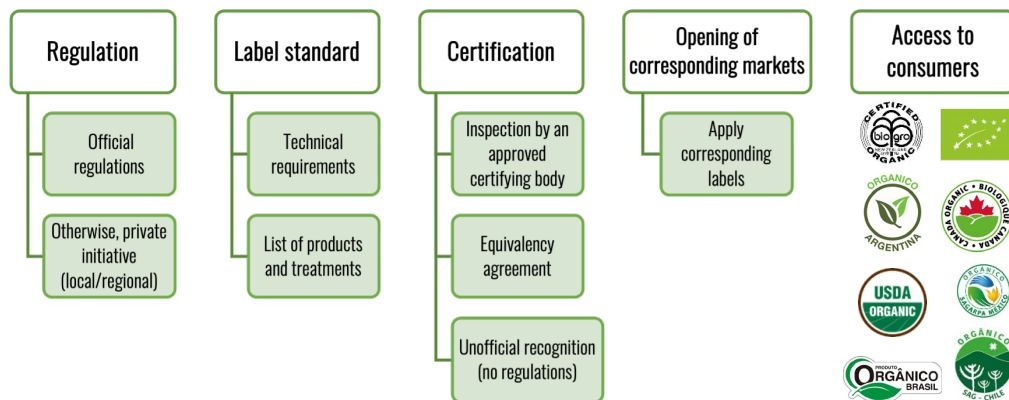


Figure 3. Overview of regulatory framework for organic certification in vitiviniculture

1. Agence Bio, L'agriculture bio dans le monde. Edition 2019.

2. Certification is the procedure by which official certification bodies, or officially recognised certification bodies, provide written or equivalent assurance that foods or food control systems conform to specified requirements. Certification of food may, as appropriate, be based on a range of inspection activities, which may include continuous on-line inspection, auditing of quality assurance systems and examination of finished products, according to the FAO (ALINORM 04/27/18 Appendix III).





As organic vitiviculture is treated differently across the world's grape-producing countries, some reference standards are technically and administratively less restrictive than they would be elsewhere, which has resulted in a strict framework governing international trade in such products. There are three scenarios when it comes to exporting organic vitivinicultural products to foreign markets and labelling a product according to the standards of the destination market:

- **Equivalency agreement:** a trade agreement between countries, whereby the country of destination deems the reference standard of the country of origin to be equivalent to its own. These agreements may grant full equivalency (e.g. the 2015 Canada-Japan agreement) or, for certain products, may specify particular conditions that are more stringent than national requirements (e.g. the 2012 US-EU agreement).

- **Mutual recognition agreement:** in the absence of official regulations, an importing country can recognise the exporting country's reference standard and apply an acronym or logo (e.g. the 2018 EU-South Africa agreement).

- **Certification of the country of destination:** in the absence of an agreement, producers must have their products certified according to the reference standard of the destination country and apply the corresponding logo.







2 • DISTRIBUTION AND EVOLUTION OF ORGANIC VINEYARDS

This chapter reports on the figures measuring certified organic viticulture worldwide, with a focus on how they have evolved since 2005. It is divided into several sections. It begins with a description of the methodology for data collection and processing. It then discusses the evolution of certified organic viticulture at the global level, before describing developments in the world's major grape-producing countries.

2.1 Methodology

This report considers vineyard surface areas only in countries that have officially recognised Participatory Guarantee Systems (PGS) as approved certifiers¹. In order to capture vineyard surface areas that meet a common global standard, this study therefore includes only those areas that are officially certified as organic and thus excludes other environmental approaches that do not strictly comply with the specifications of organic agriculture².

The areas considered in this report represent, for the majority of countries, vineyards that have already been converted to organic farming as well as those that are in the process of conversion. Some countries make no distinction between the two types of land³.

Data on certified organic viticulture was collected for 63 countries over the 2005–2019 period and was used to obtain the total and the global distribution figures. Note, however, that the analysis of certified organic viticulture and how it has developed is based on countries with at least 1000 ha of organically managed vineyards in 2019. It is also important to point out that many countries, identified later in this report, do not collect annual surface area or production data for organic viticulture. This may lead to datasets coming from different sources in the industry and thus to an underestimation of the true situation.

Data for the 63 countries included comes from the following sources:

- Official data provided by OIV Member States through questionnaires⁴,
- Official data published by governmental or intergovernmental agencies (e.g. Eurostat),
- Non-official data published by organisations representing the vitivincultural sector or the organic agriculture sector (e.g. FiBL),
- Non-official data from other sources (e.g. press kits, technical journals, newspapers),
- OIV estimates.

The surface areas and variables of organic production are thus compared with the surface areas and variables of 'non-organic' production. This latter category includes all production methods that are not certified as organic.

1. This participatory certification based on transparency is an alternative approach to third-party certification. It is adapted to small and diversified structures by reducing the costs of certification and the time spent on administrative monitoring, and also by empowering producers and other stakeholders in the chain since certification no longer depends on a single auditor. PGS are recognised by national regulations in a number of grape-producing countries, including Brazil, Chile, India, Mexico, Peru and Uruguay.

2. Many countries have developed environmentally friendly production systems that do not refer to organic farming. This is the case for collective approaches such as 'Sustainable Winegrowing New Zealand'; 'Napa Green, Certified Sustainable Winegrowing' and 'Salmon Safe' in the USA; 'Sustainable Wine of Chile'; or 'Integrated Production of Wine' in South Africa. For these countries, which are often major wine producers, the certified organic vineyard surface areas included in this report are lower than expected. This is because some environmental approaches have been excluded as they do not correspond precisely to the definition of 'organic'.

3. Australia, Canada, Chile, Egypt, Liechtenstein, Iran, Mexico, New Zealand, Switzerland, Uzbekistan, Uruguay and the USA.

4. The OIV's general principles of organic vitivinculture were used as the basis for the country comparisons in this study. OIV Member States were invited to provide data on vineyard surface areas that are managed according to these principles of organic agriculture and certified. Certification ensures that the areas are managed in compliance with regulations.





2.2 Distribution and evolution of the world's organic vineyards

In 2019, a total of 63 countries across all continents were involved in organic viticulture (Figure 4) and the **certified organic vineyard surface area was estimated at 454 kha, representing 6.2% of the world's total area under vines**. Although the map in Figure 4 clearly shows the high concentration of organic vineyards in Europe, this production method is also gaining ground in numerous countries across the other continents.

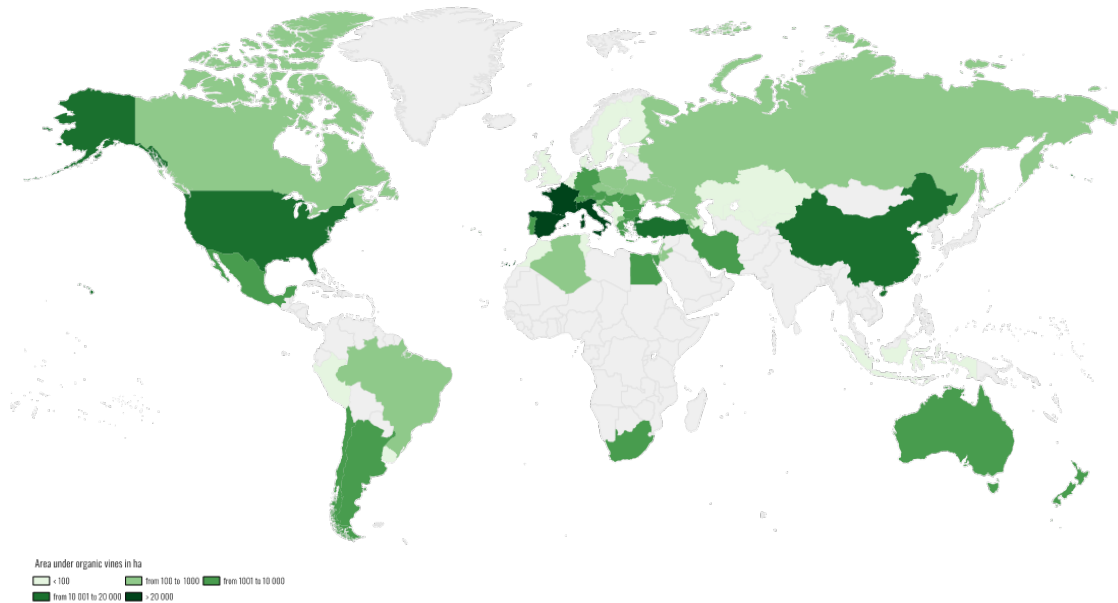


Figure 4. Overview of the world's organic vineyards in 2019

The rate of conversion of vineyards to organic production has increased considerably since the beginning of the 21st century. Over the entire period analysed for this report (2005–2019), the certified organic vineyard surface area **increased by an average of 13% per year**, while the 'non-organic' vineyard area decreased by an average of 0.4% per year within the same timeframe. One of the factors explaining this intense growth rate is the fact that certified organic viticulture is still a recent phenomenon. Furthermore, it is evident from Figure 5 that global growth is divided into distinct growth periods. Organic surface areas grew exponentially between 2005 and 2011 (+18% per year on average), only to slow down between 2011 and 2014 to an average annual rate of +4%. From 2014 onwards, the growth rate increased again to an average of +8% per year.

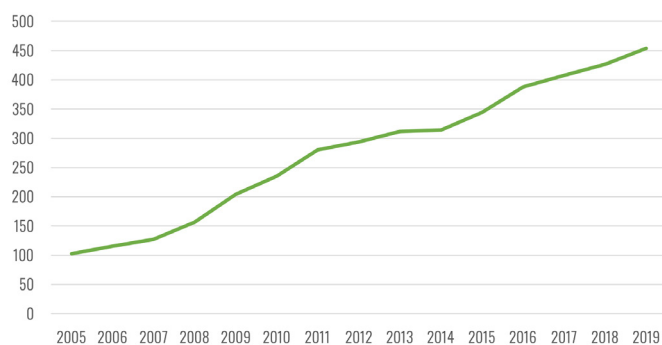


Figure 5. Evolution of world area under organic vines

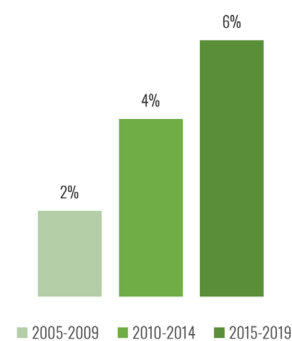


Figure 6. Share of organic viticulture in total world viticulture



Behind this growth in the world's organic vineyards, there is nonetheless significant movement in both an upwards and downwards direction, since the conversion of a vineyard to organic cultivation is often complex and requires a considerable amount of adaptation. Weather phenomena or structural and/or organisational issues may drive producers to abandon their certification in organic production, resulting in a local decrease in organic vineyard areas. In addition, the typically lower yields in organic viticulture can also be a reason for withdrawing from a label or certification. These factors, which have an impact on the surface area, vary greatly from one country to another depending on the weather conditions of the vintage.

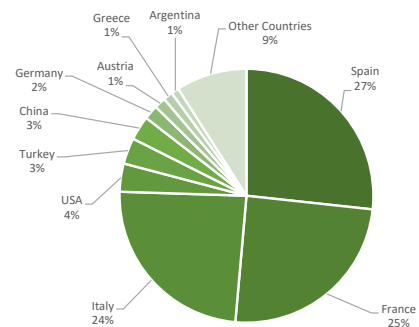


Figure 7. Distribution of world area under organic vines in 2019

In terms of the distribution of organic vineyards, 10 countries account for 91% of the world total. Of these 10 leaders in organic production (Figures 7 and 8), 3 are in Europe: **Spain, Italy** and **France** primarily cultivate wine grapes and account for **75% of the world's certified organic vineyard surface area**. This trio is followed by 3 non-European countries: the United States (4%), which is a major player in organic viticulture, with its surface area divided across the production of wine grapes, table grapes and raisins; then Turkey (3%), which produces mainly table grapes and raisins; and China (3%), which cultivates both table grapes and wine grapes. Finally, Germany (2%), Austria (1%), Greece (1%) and Argentina (1%), the only representative from South America, complete the top 10 of organic grape-growing countries, with vineyards dedicated mainly to the production of wine grapes.

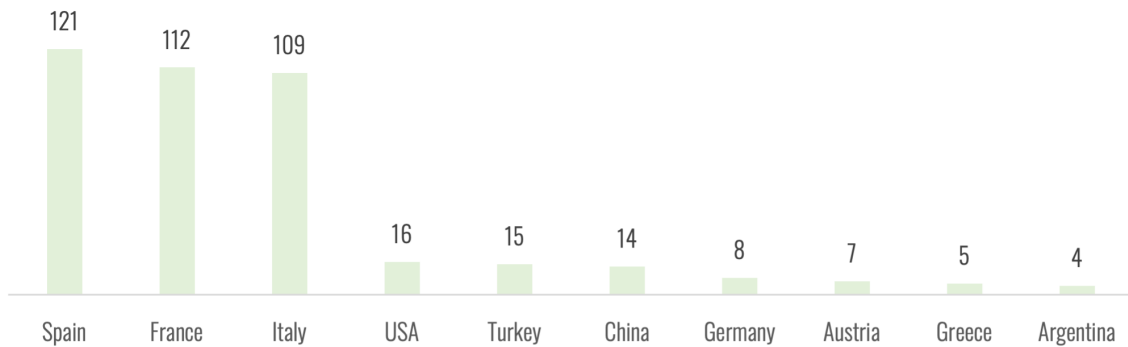


Figure 8. Top 10 countries by area under organic vines in 2019 (kha)

In terms of the **weight of organic vineyards as a share of the country's total area under vines**, the ranking¹ is dominated by European countries. Italy devotes 15% of its vineyards to organic viticulture, followed by France (14%) and Austria (14%). The only non-European country inside the top 10 is Mexico, with 8% of its vineyard area certified organic.

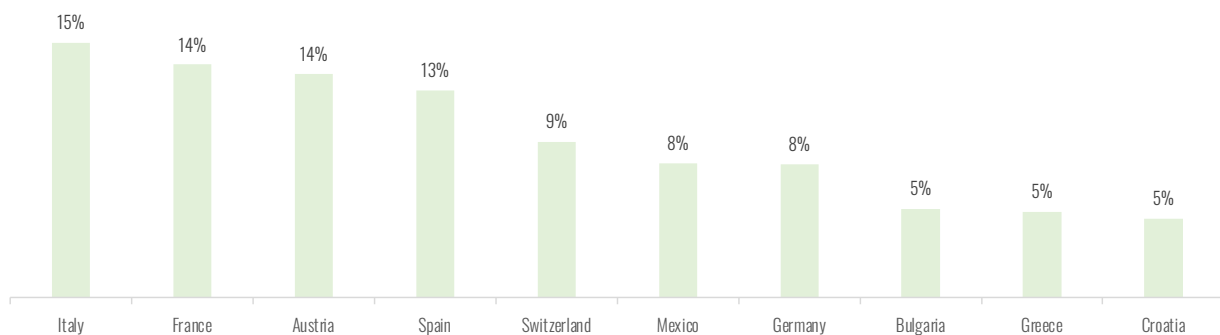


Figure 9. Top 10 countries by area under organic vines as % of total area under vines in 2019

1. Organic vineyards with a surface area greater than or equal to 1 000 ha in 2019.



If we look at the **average annual growth rate** over the period 2014–2019, the ranking of the top 10 countries¹ changes dramatically. The five countries with the highest growth rate in their national organic vineyard are Egypt (+36%/year), South Africa (+30%/year), Switzerland (+15%/year), France (+11%/year) and Turkey (+10%/year).

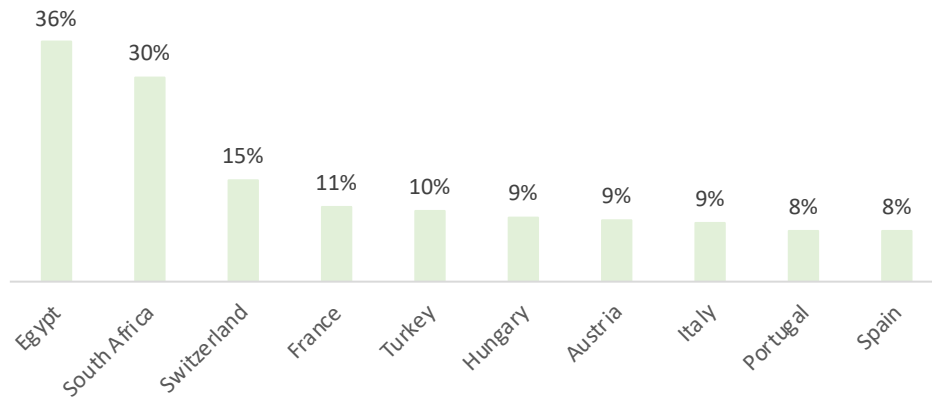


Figure 10. Top 10 countries by average annual growth rate of area under organic vines over the period 2014–2019

2.3 Evolution of organic vineyards by country

This section outlines relevant aspects pertaining to countries considered important for organic viticulture, either because of the expanse of their organic surface area or because of notable developments. For each of these countries, key figures on surface area and changing trends are presented.

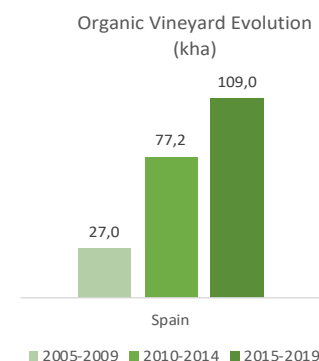
2.3.1 Europe

Certified organic vineyards are highly concentrated in Europe, which in 2019 accounted for 381 kha, or 84% of the world's total certified organic vineyard surface area.

Within the European Union (EU)

Certain EU policies have encouraged the development of organic areas, particularly vineyards. In the EU, the development of organic vitiviniculture is provided for in the second pillar of the Common Agricultural Policy (CAP), which has contributed to the expansion of Europe's organic surface areas².

In 2019, **Spain** was the world's leading organic producer by area under vines with **121 kha** (27% of the world's organic vineyard area). In the same year, a total of 13% of its national vineyard had organic certification. Between 2005 and 2019, Spain experienced significant expansion in its organic vine areas with an average annual growth rate of 16%. The three main regions by surface area are Castile-La Mancha (50.5% of the organic vineyard area), Catalonia (15.4%) and Valencia (10.6%)³.



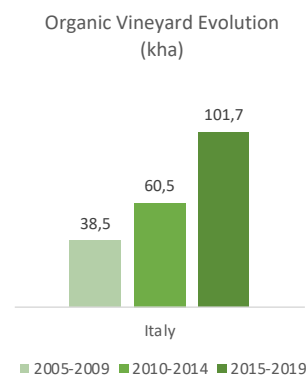
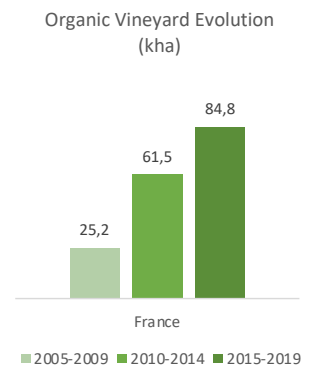
1. Organic vineyards with a surface area greater than or equal to 1 000 ha in 2019.

2. One of the key innovations in the recent Single Regulation (EU) 2018/848 is the recognition of producer groups to facilitate the certification of small operators. In the CAP for the period 2014–2020, 14 EU Member States subscribed to measures to support the conversion and maintenance of certified organic viticulture in their Rural Development Plans. Financial aid for organic conversion varies widely from one country or region to another, from the smallest grant of €350/ha in France to €2 855/ha in Germany. For more information on organic regulations in the EU: <https://eur-lex.europa.eu>.

3. Ministerio de Agricultura y Pesca, Alimentación y medio ambiente (2018) Estrategia para la producción ecológica 2018–2020. Madrid.

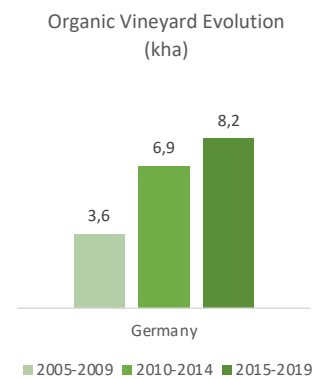


France is the world number two by area under organic vines: in 2019, its organic vineyards, primarily cultivating wine grapes, occupied **112 kha**, which represents 25% of the world's organic vineyard area. This certified organic area accounts for 14% of France's national vineyard. Driven by significant domestic demand (on average only 40% of organic wines are exported), France has seen strong growth in certified organic areas over the last 20 years: between 2005 and 2019, these have increased by an average of 14% per year. Broadly speaking, the certified organic vineyards are concentrated in the wine-growing regions around the Mediterranean basin, namely Occitania (37%) and Provence-Alpes-Côte d'Azur (22%), or on the Atlantic side, in New Aquitaine (17%).



Certified organic vineyards in **Italy** have been steadily increasing since 2005 at an average rate of 9% per year, spurred on by research, European aid and national development plans. In 2019, Italy was the world's third-largest organic vineyard, covering around **109 kha** and representing 24% of the global total. In all, 15% of the country's grape-growing area is cultivated organically. Vineyards are distributed across the different regions, with the majority located in Sicily, Apulia and Tuscany, which respectively represent 27%, 15% and 14% of the national area under organic vines. Italy is a major market for organic products and is largely export-oriented, with around 85% of its organic wines¹ exported each year.

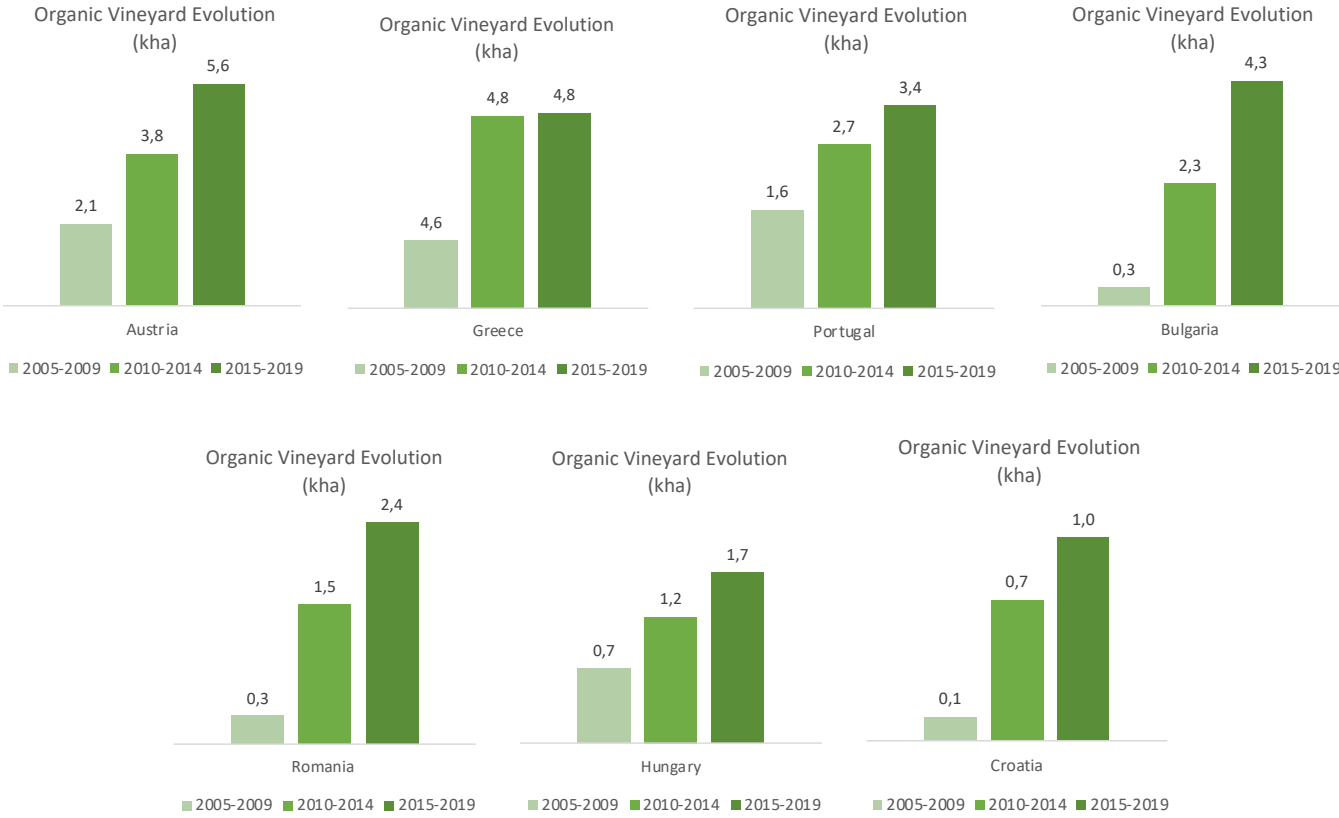
Germany is home to the EU's fourth-largest organic vine area, with **8.3 kha** of organically cultivated vineyards in 2019. Since 2005, the area under organic vines has increased by an average of 9% per year and now represents 8% of the total national vineyard area. Germany is an important market for organic products and, as the birthplace of biodynamics, was one of the early adopters of organic viticulture. It has boasted numerous research projects and organisations since as early as the 1920s.



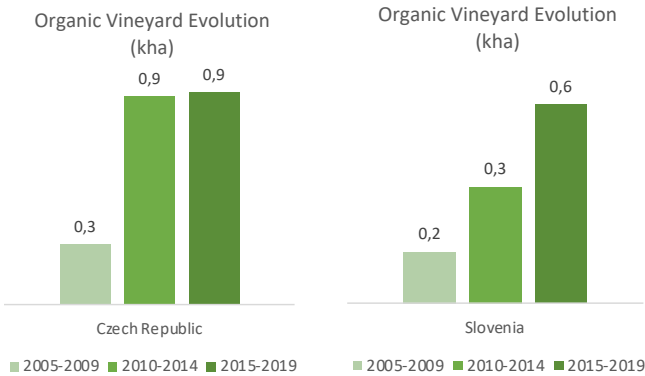
1. IWSR/SudVinBio (2019) Mondial du vin biologique 2019. Montpellier, France.



Finally, other EU countries with organic vineyard areas above 1 000 ha include **Austria (6.6 kha)**, **Greece (5.5 kha)**, **Portugal (4.0 kha)**, **Bulgaria (3.6 kha)**, **Romania (2.8 kha)**, **Hungary (1.9 kha)** and **Croatia (1.1 kha)**. In 2019, these countries shared 7% of Europe's area under organic vines. Austria, Bulgaria, Greece and Croatia all have more than 5% of their vineyards certified organic. In Portugal, Romania and Hungary, the area under organic vines as a share of the total area is around 2%.

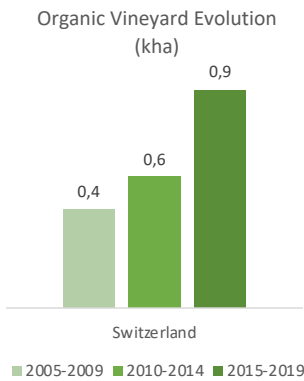


Certified organic vineyards are also present in other countries such as the Czech Republic, Slovenia, Cyprus, Poland, Slovakia, Luxembourg, Belgium, the UK, Denmark, the Netherlands and Malta. The organic areas of these countries are all well below 1 000 ha.





Outside the EU

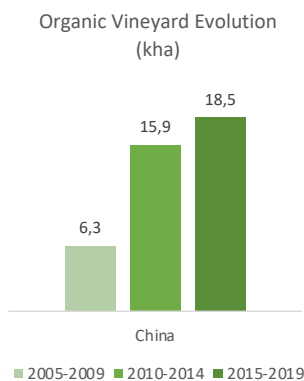
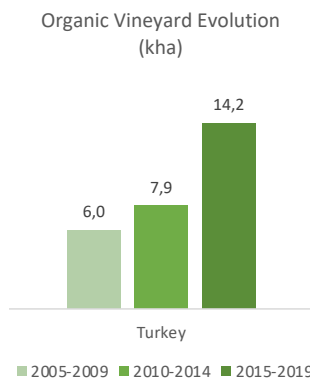


The largest European organic wine producer outside the EU is **Switzerland**. It possessed 1.4 kha of certified organic vineyards in 2019, or 0.3% of the world total. It was the first European country outside the EU to develop organic viticulture, with 9% of its vineyard area managed organically. Between 2005 and 2019, Switzerland saw its area under organic vines grow by an average of 9% per year. This rate reached 15% if only the period 2014–2019 is taken into account.

As for other European countries outside the EU, **Ukraine, Macedonia, Russia, Serbia, Moldova, Montenegro, Liechtenstein, Albania** and **Andorra** all have less than 1000 ha of organically cultivated vines. In these countries, the share of organic vineyards in viticulture was below 1% in 2019.

2.3.2 Asia

Covering 3.3% of the global area under organic vines, **Turkey**¹ is the world's fifth-largest producer by organic vineyard area with 15.1 kha (representing 3.5% of its national vineyard area). Since 2005, the country's organic vineyard surface area has been growing at an average annual rate of 9%. Organic production is chiefly for table grapes and raisins. Organic raisins are primarily produced in the provinces of Manisa and Izmir and are exported to European countries in particular².



China is the sixth-largest country in terms of organic vine surface area, with this occupying 14 kha in 2019, which was 3.1% of the global total. China began to expand its organic vineyard area in the early 2000s and established a national reference standard for organic production in 2004³. Although there was noticeable growth in the country's organic vine areas from that time, it was not until 2014, with the introduction of rules around processing, labelling, certification and imports/exports, that there was a dramatic jump in organic areas (+10 kha between 2015 and 2017).

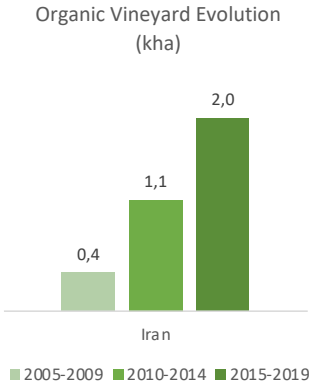
In 2018 and 2019, however, there was a sharp decline, generating a degree of uncertainty about the future of organic vitiviniculture in the country.

1. For more information on organic regulations in Turkey: <https://www.mevzuat.gov.tr>
 2. Ateş, F. et al. (2016) 'Effects of different level of leaf removal applications on mineral substance of raisins in organic Sultani Çekirdeksiz grape growing', BIO Web of Conferences. Edited by J.-M. Aurand, 7, pp. 2–4. doi: 10.1051/bioconf/20160701003.
 3. For more information on organic regulations in China: <https://www.chinesestandard.net>.

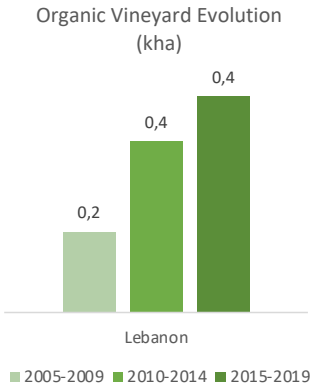




Accounting for 1% of the total national vineyard, **Iran's** area under organic vines spanned 2 kha in 2019 and experienced a positive growth trend over the 2010–2019 period (+12% per year)¹. Most of the grapes are used to make raisins, not only for export but also for the domestic market, where a growing number of establishments are specialising in organically grown produce.



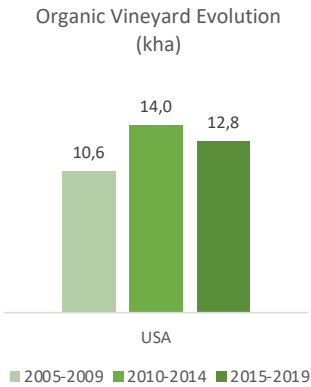
While many grape growers in Asia have made the transition to organic viticulture, growth in the vineyard surface area continues to be slow. This is the case in **Lebanon, Jordan, Armenia, Georgia, Israel, Uzbekistan, Azerbaijan, Kazakhstan, Kyrgyzstan** and **Indonesia**. In all of these countries, there is overall growth but on a small scale: they each had organic areas covering less than 1 000 ha in 2019, together accounting for 3% of Asia's organic vineyard area and 0.3% of the world's.



2.3.3 North America and South America

North America

Organic vineyards in the **United States**² occupied 16.3 kha in 2019. The country has the world's fourth-largest organic vineyard area, representing 3.6% of the world total. Organic wine grapes (about 60% of farms), table grapes (30%) and raisins (10%) are cultivated here. In the United States – the world's largest market for organic agricultural produce – these products are increasingly becoming part of consumer habits. Growth in organic surface areas has been slower than in other countries with similarly large organic vineyard areas. Certified organic areas still fluctuate considerably, with vineyards moving in and out of the organic system.

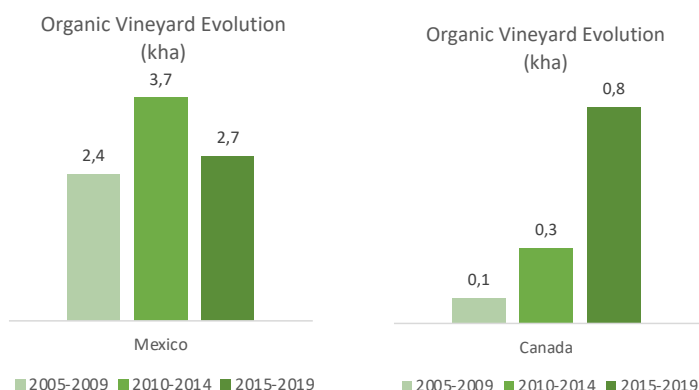


1. Note that data on the organic surface area first became available in 2007.
2. For more information on organic regulations in the United States: <https://www.ecfr.gov/>.



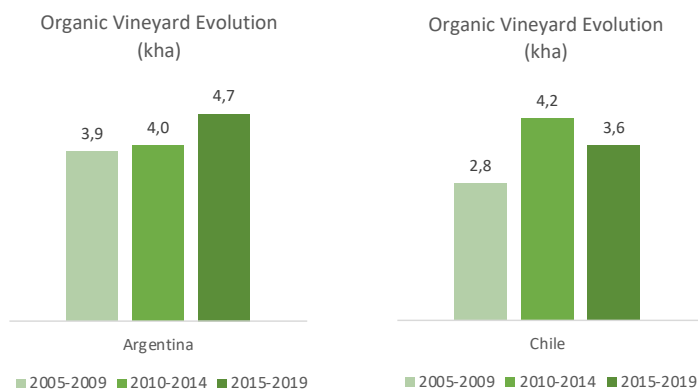
Organic vine areas in **Mexico** peaked at 4.3 kha in 2012 and then fluctuated around 2.5 kha to finally reach 3.1 kha in 2019, representing 8% of the national vineyard area.

Canada has the third-largest organic vine area in North America, but it remains modest at less than 1 000 ha.



South America

The area under organic vines in **Argentina**¹ (4.4 kha in 2019, or 2% of its national vineyards) has struggled to stabilise and continues to fluctuate greatly. Despite a decline since 2017, it still holds 10th place in the world in terms of surface area and is the leading country in South America (representing almost 50% of the continent's organic vineyard area). Argentina's main export markets are the EU (75% in 2018, with Sweden as the main destination), the United States and Canada.



The area under organic vines in **Chile**² covered 3.5 kha in 2019. After recording strong growth between 2005 and 2009, it settled between 3 kha and 4 kha over the 2010–2019 period. Vineyards producing wine grapes are Chile's primary organic fruit crop, covering 45% of the certified land versus 0.2% for table grapes³. Similar to Argentina, Chile's vitivinicultural production is mainly destined for export to the USA and the EU.



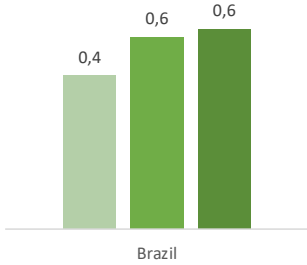
1. For more information on organic regulations in Argentina: <http://www.senasa.gob.ar>.

2. Chile's first regulations were ratified in 1999 and the official control system took effect in 2006. For more information on organic regulations in Chile: <http://normativa.sag.gob.cl>.

3. Servicio Agrícola y Ganadero (2019), Estadísticas nacionales de producción orgánica 2019. Gobierno de Chile. Departamento de Agricultura Orgánica. Santiago, Chile.



Organic Vineyard Evolution (kha)



■ 2005-2009 ■ 2010-2014 ■ 2015-2019

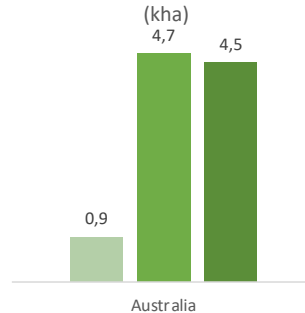
For other countries in South America, the certified organic vineyard area is below 1 000 ha. In **Brazil**¹, which has the third-largest organic vineyard area in South America, the majority of organic land is used for the production of organic grape juice (97% in 2019), with varieties resistant to fungal diseases enabling high yields. In **Peru**, where organic agriculture has expanded significantly over the past 15 years through Participatory Guarantee Systems (PGS), regional programmes to develop organic grape growing for pisco are being created. Finally, **Uruguay** boasts the largest ratio of organic to non-organic farmland in South America. That said, expansion of its organic vineyard area, distributed among a few small producers, remains slow.

2.3.4 Oceania

After a period of intense growth, there was an apparent decline in both the number of producers and the area under organic vines, which fell from more than 3% to 1.7% of the total vineyard area.

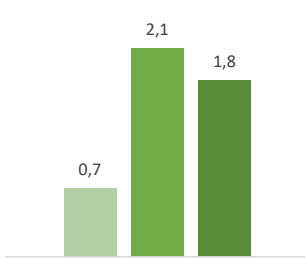
In 2019, **Australia** accounted for almost 51% of the world's area under organic farming for all agricultural production². However, only 0.6%, or **2.5 kha**, of the country's vineyard area is certified organic. In Australia, as in other countries in the southern hemisphere, the government has promoted sustainable viticulture, which has restricted the development of organic viticulture. Incentives to support the vitivincultural sector in developing organic production are limited, although research is encouraged at the federal level. Organic viticulture peaked at over 7 kha in 2014, followed by a negative trend over the 2014–2019 period (–18% per year on average).

Organic Vineyard Evolution (kha)



■ 2005-2009 ■ 2010-2014 ■ 2015-2019

Organic Vineyard Evolution (kha)



■ 2005-2009 ■ 2010-2014 ■ 2015-2019

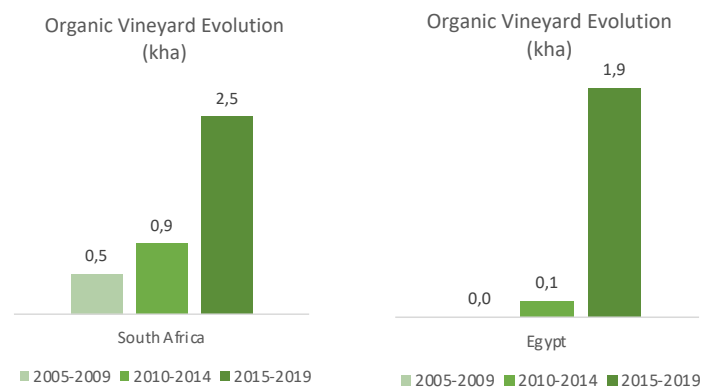
In **New Zealand**, organic vineyards cover 4.3%, or 1.7 kha, of the total area. This represents 4.4% of Oceania's vineyard surface area and 0.4% of the world's total area under organic vines. A total of 98% of New Zealand's vineyards are certified as 'Sustainable Winegrowing', a national initiative that began in 1995 to promote the development of sustainable viticulture. Organic regulations and organic surface areas, however, have been slower in coming to fruition.

1. The figures provided by the Secretariat of Agriculture, Fisheries and Rural Development refer to wine production in the province of Rio Grande do Sul. Organic areas have been separated from the total area only since the 2019 harvest, when the Sisdevin registration system was modified.
 2. Agence Bio, L'agriculture bio dans le monde. Edition 2019.



2.3.5 Africa

In **South Africa**, the area under organic vines was 4 kha in 2019, representing 3.2% of the total vineyard area and 0.9% of the world's certified organic area. The country's organic vineyard area has experienced pronounced fluctuations, although the overall trend since 2005 has been towards growth, with an average annual growth rate of around 30%. Even so, the rate of expansion of the certified organic vineyard area is still relatively slow¹. The development of 'climate-smart agriculture' was included in South Africa's national Agricultural Policy Action Plan 2015–2019, which could stimulate future conversions.



Egypt's organic vineyards occupy 2.3 kha, which is the second-largest organic vineyard area in Africa. This represents only 2.7% of the national total vineyard area, although the first available data dates back to 2013; since that year, the increase in the area under organic vines has been remarkably high (+36%/year between 2014 and 2019).

Other African countries with organic vineyards, albeit all below 1 000 ha, include **Algeria**, **Morocco** and **Tunisia**. Organic vitiviniculture in these countries is thriving through research and academic resources, but the development of areas dedicated to organic production remains very limited. Moreover, low domestic wine consumption does little to encourage the expansion of organic vineyards. In some countries, such as Algeria, a regulatory framework for the organic sector is under construction.

¹ South Africa does not have an official certification programme or inspection agency for organically produced food. Certification is carried out according to international standards and private accreditation systems without government support. In addition, the industry has been moving vineyards (95%) towards integrated production since 2000, when a national certification was introduced: Integrated Production of Wine (IPW) follows the OIV guidelines for sustainable vitiviniculture. This method relies heavily on the protection of soil and water resources, which is a matter of concern given the dry seasons experienced in the country. There are no official regulations for organic farming, including organic viticulture, but draft standards developed by the South African Bureau of Standards (SABS) are in preparation.





Thanks! Follow us.



International Organisation of Vine and Wine
Intergovernmental Organisation
Created on 29 November 1924 • Refounded on 3 April 2001

OIV