Organic Agriculture in Europe 2009: Production and Market

Helga Willer
Research Institute of Organic Agriculture FiBL, Switzerland
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World: Development of organic agricultural land 2007 to 2009 by geographical region

Source: FiBL & IFOAM Survey 2010
World: The ten countries with the most organic agricultural land 2009 (total: 37.2 million ha)

Argentina, US and Uruguay: Only fully converted areas

Source: FiBL/IFOAM Survey 2011, based on data from governments, the private organic sector and certifiers.
The ten countries/areas with the highest shares of organic agricultural land 2009

Source: FiBL/IFOAM Survey 2011, based on data from governments, organic sector organisations and certifiers.
Europe: Organic agricultural land by country 2009

Share of organic agricultural land
- < 1%
- 1% - 5%
- 5% - 10%
- 10% - 20%
- > 20%

Source: FiBL Survey 2011
Key data indica tors

- 9.3 million hectares of agricultural land are organic (including in conversion areas).
- The organic agricultural land increased by 1 million hectares or twelve percent.
- 5 countries have more than ten percent organic agricultural land, 12 countries between 5 and ten percent;
- 260’000 producers were reported.
- The market was 18.4 billion euros, an increase of roughly five percent compared with 2009
Europe: The ten countries with the most organic agricultural land 2009

Spain: 1'330'774 hectares
Italy: 1'106'684 hectares
Germany: 947'115 hectares
United Kingdom: 721'726 hectares
France: 677'513 hectares
Austria: 518'757 hectares
Czech Republic: 398'407 hectares
Sweden: 391'524 hectares
Poland: 367'062 hectares
Greece: 326'252 hectares

FiBL/IFOAM Survey 2011, based on data from governments, the private organic sector and certifiers.
Europe: Distribution of organically managed agricultural land by country 2009 (Total: 9.3 million hectares)

- **Spain**: 1,330,774 ha; 14%
- **Italy**: 1,106,684 ha; 12%
- **Germany**: 947,115 ha; 10%
- **Rest**: 5,878,424 ha; 64%

Source: Data based on information of Eurostat, ministries, certification bodies and the private sector. Compiled by FiBL 2011
Europe: The ten countries with the highest shares of organic agricultural land 2009

- Liechtenstein: 26.9%
- Austria: 18.5%
- Sweden: 12.6%
- Switzerland: 10.8%
- Estonia: 10.5%
- Czech Republic: 9.4%
- Latvia: 9.0%
- Italy: 8.7%
- Slovakia: 7.5%
- Finland: 7.3%

Source: FiBL Survey 2011
Development of the organic agricultural land in Europe 1985-2008

Source: FiBL, Aberystwyth University, AMI/ZMP
Europe: The five countries with the highest increase of organic agricultural land 2008-2009

- Turkey
- Spain
- Italy
- France
- Czech Republic

Hectares

Source: FiBL/IFOAM Survey 2010, based on data from governments, the private organic sector and certifiers
Europe: Use of organic agricultural land 2009 (total: 9.3 million hectares)

Distribution of main agricultural land use types 2009

The main arable crops 2009

- Cereals: 1,740
- Field fodder crops: 1,394
- Protein crops: 162
- Oilseeds: 153
- Vegetables: 103

The main permanent crops 2009

- Olives: 366
- Grapes: 167
- Nuts: 160
- Fruit, temperate: 71
- Citrus fruit: 40

Source: FiBL Survey 2011
Key crop groups in organic agriculture: 2008 and 2009 compared

FiBL/IFOAM Survey 2011, based on data from governments, the private organic sector and certifiers
Development of the global market for organic food and beverages

Revenues in billion US Dollars

Source: Organic Monitor (Sahota 2011)

Million Euros

<table>
<thead>
<tr>
<th>Year</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>10'792</td>
</tr>
<tr>
<td>2005</td>
<td>12'103</td>
</tr>
<tr>
<td>2006</td>
<td>13'536</td>
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<tr>
<td>2007</td>
<td>15'483</td>
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<td>2008</td>
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<tr>
<td>2009</td>
<td>18'400</td>
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</tbody>
</table>

Source: FiBL, AMI & ORC 2006 - 2011
The countries with the largest domestic markets for organic food 2009

United States of America  17'835
Germany  5'800
France  3'041
United Kingdom  2'065
Italy  1'500
Canada (2008)  1'284
Switzerland  1'023
Japan  1'000
Spain  905
Austria  868

Million Euros

Source: FiBL, AMI, ORC 2011, based on national sources
The European organic market for organic food and drink: Growth rates for selected countries 2009

Market growth 2009 in %
(Not all countries with market data supplied information in the market share)

Source: Data based on information of ministries, certification bodies and the private sector. Compiled by FiBL, AMI & ORC 2011
Europe: Distribution of sales of organic food and drink by country 2009 (total: 18.4 billion Euros)

- Germany: 33.2%
- France: 23.2%
- UK: 17.4%
- Italy: 8.6%
- Switzerland: 5.9%
- Rest: 11.8%

Source: FiBL, AMI, ORC Survey 2011
The European market for organic food and drink: The countries with the highest sales 2009

<table>
<thead>
<tr>
<th>Country</th>
<th>Sales in million Euros</th>
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</thead>
<tbody>
<tr>
<td>Germany</td>
<td>5'800</td>
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<tr>
<td>France</td>
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<td>UK</td>
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<td>Austria</td>
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<td>Denmark</td>
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<tr>
<td>Sweden</td>
<td>698</td>
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<tr>
<td>Netherlands</td>
<td>591</td>
</tr>
<tr>
<td>Belgium</td>
<td>350</td>
</tr>
</tbody>
</table>

Source: Data based on information of ministries, certification bodies and the private sector. Compiled by FiBL, AMI and ORC 2011
The European organic market for organic food and drink: The countries with the highest shares of organic food sales 2009

- Denmark: 7.2%
- Austria: 6.0%
- Switzerland: 5.2%
- Germany: 3.4%
- Sweden: 3.4%
- Luxemburg (2006): 3.3%
- Netherlands: 2.3%
- France: 1.9%
- Belgium: 1.5%
- Norway: 1.3%

(Not all countries with market data supplied information in the market share)

Source: Data based on information of ministries, certification bodies and the private sector. Compiled by FiBL, AMI & ORC 2011
The European market for organic food: The countries with the highest per capita consumption 2009

Source: Data based on information of ministries, certification bodies and the private sector. Compiled by FiBL, AMI & ORC 2011
Summary: Organic market in Europe 2009

› **Land area**
  - The organic agricultural land increased by 1 million hectares or 12 percent – to 9.3 million hectares (EU: 8.4 million hectares)
  - The highest growth was in Turkey and Spain (both +0.2 million hectares) and Italy (+0.1 million hectares)
  - The countries with the highest shares of organic agricultural land are Liechtenstein, Austria and Sweden.

› **Organic market**
  - The organic market increased by roughly five percent to 18.4 billion Euros;
  - Highest growth rates were reported for France (+19 percent) and Sweden (+16 percent)
  - The market value stagnated however in Germany and it decreased in the UK (-13 percent)
  - The highest per-capita consumption is in Denmark and in Switzerland with more than 130 Euros annually
  - The highest market shares are in Denmark, Austria and Switzerland.