ORGANIC IN EUROPE
PROSPECTS AND DEVELOPMENTS
**Germany**

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**Key Indicators 2012**

<table>
<thead>
<tr>
<th>Area</th>
<th>Organic agricultural area</th>
<th>1,034,355 hectares</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share of total agricultural area</td>
<td>6.2%</td>
<td></td>
</tr>
<tr>
<td>Change 2002 to 2012</td>
<td>+48%</td>
<td></td>
</tr>
<tr>
<td>Change 2011 to 2012</td>
<td>+1.8%</td>
<td></td>
</tr>
<tr>
<td>Operators</td>
<td>Organic producers</td>
<td>23,032</td>
</tr>
<tr>
<td></td>
<td>Organic processors</td>
<td>8,293</td>
</tr>
<tr>
<td></td>
<td>Organic importers</td>
<td>309</td>
</tr>
<tr>
<td></td>
<td>Organic exporters</td>
<td>No data</td>
</tr>
<tr>
<td>Market and trade</td>
<td>Retail sales</td>
<td>EUR 70.4 billion</td>
</tr>
<tr>
<td></td>
<td>Share of total market</td>
<td>3.7%</td>
</tr>
<tr>
<td></td>
<td>Per capita consumption</td>
<td>EUR 86</td>
</tr>
<tr>
<td></td>
<td>Change in retail sales 2011 to 2012</td>
<td>+6.3%</td>
</tr>
<tr>
<td></td>
<td>Organic exports</td>
<td>No data</td>
</tr>
<tr>
<td></td>
<td>Organic imports</td>
<td>No data</td>
</tr>
</tbody>
</table>

**Highlights for 2013**

- The organic agriculture trainee programme celebrates its 10th anniversary
- 12th scientific conference held in March 2013
- Organic retail sales exceed EUR 7 billion

**History of Organic Farming**

- 1924: Rudolf Steiner gives eight talks on the spiritual foundation of agriculture, later called biodynamic agriculture, at the Koberwitz estate near Breslau in Silesia (today Wroclaw in Poland)
- 1950s: Hans Müller of Switzerland develops the organic-biological farming method, the theoretical basis of which is provided by the German medical doctor and microbiologist Hans-Peter Rusch
- 1961: Foundation Ecology & Agriculture is established
- 1971: Bioland is founded, Germany’s largest organic producer organisation
- 1988: The working group on organic agriculture (AGÖL) is founded as an umbrella organisation; AGÖL ceased its activities in 2002
- 1989: Support for organic farmers through the so-called extensification programme
- 1991: First scientific conference of the German-speaking countries takes place
- 2002: Federal organic farming scheme is launched
- 2002: German Federation of the Organic Food Industry (BÖLW) is founded

**Key Sector Institutions**

- Federation of the Organic Food Industry (BÖLW) and its member associations: www.boelw.de
- Research Institute of Organic Agriculture Germany (FiBL): www.fibl.org

**Production Base: Land Use and Key Crops**

- Of the 1,034,355 hectares of organic agricultural land, 55.8% consists of permanent grassland and grazing areas, 41.57% is arable land, and 1.6% is used for permanent crops. The key arable crops are cereals (202,000 hectares), followed by green fodder from arable land (153,000 hectares), and protein crops (22,200 hectares). The key permanent crops are grapes (7,400 hectares), temperate fruit (6,800 hectares), and berries (1,546 hectares).

**Market**

- The share of organic food sales in the total turnover for food products in Germany increased from EUR 1.48 billion in 1997 to approximately EUR 7.04 billion in 2012 (excluding restaurants and catering). This accounted for 3.7% of the food market. Experts believe that organic farming still has considerable growth potential.

**Top-selling products**: Vegetables, including potatoes (EUR 561.7 million, 8.2% of the total market); bread and bakery products (EUR 459.3 million, 5.9% of the total market); and fruit (EUR 389.2 million, 6.5% of the total market).32

**Market channels**: Approximately 50% of organic products are sold through general retailers, 31.4% through organic retailers and 18.5% through other channels.

**Exports and imports**: Germany is not only the largest market for organic products in Europe, but also one of its largest organic producers. However, in 2009/10 organic imports accounted for between 2% and 95% – depending on the product – all of which could have been produced domestically.

**Standards, Legislation, Organic Logo**

- The Organic Farming Act (ÖLG) pools specific executive functions in German organic farming, and has stricter requirements than EU legislation on organic farming. The Organic Farming Act was promulgated in the Federal Law Gazette on 15 July 2002.

Germany has its own organic logo, the Biosiegel, www.biosiegel.de.
**Policy Support**

**National Action Plan:** In 2002, the Federal Organic Farming Scheme was set up to improve research and the general conditions for organic farming. The scheme was extended to include other forms of sustainable agriculture under a resolution adopted by the German Parliament on 26 November 2010. EUR 34.8 million were made available for the scheme in 2002, approximately EUR 36 million in 2003, EUR 20 million annually from 2004 to 2006, and EUR 16 million from 2007 to 2012. In 2013, EUR 17 million was made available. The programme’s financial resources are to be maintained at this level in the medium term. However, since 2011 the scheme has been also open to other forms of sustainable agriculture.

**Support under EU Rural Development Programmes:** Germany has used public funds to promote the introduction of organic farming since 1989. Since 1994, the federal states have carried out agri-environmental programmes to support the introduction and maintenance of organic farming.

**Research & Advice**

In 1981, the first chair in organic agriculture worldwide was established at the University of Kassel-Witzenhausen. Research also takes place at other universities, at state research stations and in private research institutes. A state research institute for organic agriculture was established in December 2000 in Trenthorst in Schleswig-Holstein, under the auspices of the *Johann Heinrich von Thünen Institute*, the federal agricultural research station. Every two years, a scientific conference takes place in the German-speaking countries, www.wissenschaftstagung.de, organised by a different university institute in cooperation with the Foundation Ecology & Agriculture (SÖL), the initiator of the conference in 1991.

There are several forms of organic advisory services: those provided by the producer associations and chambers of agriculture; the partly state-funded *Ringberatung*, in which a number of producers collectively hire an advisor; and the official advisory service. Training is available for advisors as part of the Federal Scheme for Organic Farming and Other Forms of Sustainable Agriculture.

**Challenges & Outlook**

One of the main challenges is the failure of supply to keep up with the continually growing demand for organic food. A large proportion of the organic products consumed are imported, although they could also be produced in the country.

**Further Information**

- Office of the Federal Organic Farming Scheme and other Forms of Sustainable Agriculture: www.bundesprogramm-oekolandbau.de
- German information portal on organic agriculture: www.oekolandbau.de
- Agricultural Market Information (AMI) company: www.ami-informiert.com

For other relevant websites, see the section on key sector institutions and research & advice.