European market data 2014

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February 10, 2016
BIOFACH Congress, NürnbergMesse, Nürnberg
Acknowledgements

› The Swiss State Secretariat of Economic Affairs SECO, Berne

› International Trade Centre ITC

› Nürnberg Messe, the organizers of the BioFach World Organic Trade Fair

› 200 experts from all parts of the world contributed to the FiBL-IFOAM survey 2014.
In Oceania there were 17.3 Mio ha, in Europe 11.6 Mio ha, and in Latin America 6.8 Mio ha.

The ten countries with the largest organic agricultural areas have combined 73% of the world’s organic agricultural land.

11 countries have more than 10% of their agricultural land under organic management.

In 2014, almost 500'000 hectares were reported compared with 2013.

Distribution of organic agricultural land by region 2014

The five countries with the largest areas of organic agricultural land 2014

Countries top five with more than 10 percent of organic agricultural land 2014

Growth of the organic agricultural land 1999-2014

Source: FiBL survey 2016  www.organic-world.net
WORLD: ORGANIC RETAIL SALES 2014

The largest single market is the US followed by the EU (23.9 billion €) and China. By region, North America has the lead (29.6 billion €), followed by Europe (26.2 billion €) and Asia.

The countries with the largest market for organic food are the United States (27.1 billion €), followed by Germany (7.9 billion €), France (4.8 billion €) and China (3.7 billion €).

Switzerland has the highest per capita consumption worldwide, followed by Luxembourg, and Denmark.

The highest shares the organic market of the total market is in Denmark, followed by Switzerland, Austria, Sweden, the United States and Germany.

The five countries with the largest markets for organic food 2014

The five countries with the highest per capita consumption 2014

The five countries with the highest organic shares of the total market 2014

Distribution of retail sales value by country 2014

Source: FiBL survey 2016 www.organic-world.net
Organic in Europe 2014 – Key indicators

› 11.6 million hectares (EU: 10.3 million hectares)
› Increase of the area: +2.4 % (EU +1.5 %)
› 2.4 % of the farmland is organic (EU: 5.7 %)
› 330’000 producers (EU: 260’000)
› Retail sales: 26.2 billion euros (EU: 23.9 billion)
› Increase in retail sales: +7.6 % (EU: + 7.4%)
Europe: Organic area: Top ten countries 2014

Europe: The ten countries with the largest organic area 2014

Source: FiBL-AMI survey 2016, based on national data sources and Eurostat

- Spain: 1,710,475 hectares
- Italy: 1,387,913 hectares
- France: 1,118,845 hectares
- Germany: 1,047,633 hectares
- Poland: 657,902 hectares
- Austria: 525,521 hectares
- United... (rest of countries are not fully visible in the image)
- Sweden: 501,831 hectares
- Turkey: 491,977 hectares
- Czech Republic: 472,663 hectares
Europe: Organic area – shares

Europe: Shares of organic agricultural land by country 2014
Source: FiBL-AMI survey 2016, based on national data sources and Eurostat

- Liechtenstein: 30.9%
- Austria: 19.4%
- Sweden: 16.4%
- Estonia: 16.2%
- Switzerland: 12.7%
- Latvia: 11.2%
- Czech Republic: 11.1%
- Italy: 10.8%
- Slovakia: 9.5%
- Finland: 9.4%

Share of total agricultural land
Europe: Development of organic farmland

Europe: Development of organic agricultural land 1985-2014
Source: Lampkin, Nic, FiBL-AMI Surveys 2006-2016, and OrganicDataNetwork Surveys 2013-2015, based on national data sources and Eurostat
Europe: Organic retail sales 2014

Europe: Organic retail sales value by country 2014
Source: FiBL-AMI survey 2016, based on national data sources

- Germany: 7'910 million euros
- France: 4'830 million euros
- United Kingdom: 2'307 million euros
- Italy: 2'145 million euros
- Switzerland: 1'817 million euros
- Sweden: 1'402 million euros
- Austria (2011): 1'065 million euros
- Spain (2012): 998 million euros
- Netherlands: 965 million euros
- Denmark: 912 million euros
Global market: Distribution of retail sales value by region 2014
Source: FiBL-AMI survey 2016, based on retail sales with organic food

- North America: 47%
- Europe: 42%
- Asia: 8%
- Oceania: 2%
- Others: 1%

Global Market: distribution of retail sales by single market 2014
Source: FiBL-AMI survey 2016, based on national data sources

- USA: 43%
- EU-28: 38%
- Switzerland: 3%
- Canada: 4%
- China: 6%
- Other: 6%
Global market: Distribution of retail sales value by country 2014
Source: FiBL-AMI survey 2016, based on retail sales with organic food

- USA: 43%
- Germany: 13%
- France: 8%
- China: 6%
- Canada: 4%
- Italy: 3%
- UK: 4%
- Switzerland: 3%
- Other: 16%

Europe: Distribution of retail sales 2014
Source: FiBL-AMI survey 2016, based on national data sources

- Germany: 30%
- France: 18%
- United Kingdom: 9%
- Italy: 8%
- Sweden: 5%
- Austria: 4%
- Spain: 4%
- Netherlands: 4%
- Others: 11%
Europe and EU: Market development 2004-2014

Europe and European Union: Market development 2004-2014
UK market grew by 4 %
Switzerland: Growth of retail sales by retailers with organic products 1995-2014

Source: Bio Suisse
Sweden: Growth of retail sales with organic products 2004-2014

6% of total market
+45% in 2014
>30% in 2015?
Organic market shares

Europe: The countries with the highest organic market shares 2014
Source: FiBL-AMI survey 2016, based on national data sources

- Denmark: 7.6%
- Switzerland: 7.1%
- Austria (2011): 6.5%
- Sweden: 6.0%
- Germany: 4.4%
- Luxembourg: 3.4%
- Netherlands: 3.0%
- France: 2.6%
- Italy: 2.2%
- Croatia: 2.2%
Per-capita consumption of organic products

Europe: The countries with the highest per-capita consumption 2014
Source: FiBL-AMI survey 2016, based on national data sources

Per capita consumption in euros

<table>
<thead>
<tr>
<th>Country</th>
<th>Consumption (euros)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switzerland</td>
<td>221</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>164</td>
</tr>
<tr>
<td>Denmark</td>
<td>162</td>
</tr>
<tr>
<td>Sweden</td>
<td>145</td>
</tr>
<tr>
<td>Liechtenstein</td>
<td>130</td>
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<tr>
<td>Austria</td>
<td>127</td>
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<tr>
<td>Germany</td>
<td>97</td>
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<tr>
<td>France</td>
<td>73</td>
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<tr>
<td>Netherlands</td>
<td>57</td>
</tr>
<tr>
<td>Norway</td>
<td>54</td>
</tr>
<tr>
<td>Finland</td>
<td>41</td>
</tr>
</tbody>
</table>
Online Resources

› Slides and infographics at www.organic-world.net and www.organic-europe.net
› Twitter.com/fiblstatistics
› Interactive maps at www.organic-world.net
› Interactive datatables at www.organicdatanetwork.net and www.organic-world.net
› Interactive infographics at www.ifoam-eu.org

Contents:
› Results of the survey on organic agriculture worldwide;
› Organic agriculture in the regions and country reports; Australia, Canada, the Pacific Islands, and The United States of America.
› Chapters on the global market, standards & legislations, voluntary standards, PGS, European market, data collection in Thailand and Australia
› Numerous tables and graphs.
› New additions:
Better Data: highlights examples of how organic market data are collected and associated challenges
Commodity case studies: a section for the analysis of selected commodities
› The book can be ordered via IFOAM.bio and shop.FiBL.org.

Get copy at FiBL stand in Hall 1/549
www.twitter.com/fiblstatistics
Data extract for bread and bakery products

<table>
<thead>
<tr>
<th>Country</th>
<th>Year</th>
<th>Bread; fresh pastry goods and cakes, total</th>
<th>Processed and preserved meat and meat products, total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>France</strong></td>
<td>2012</td>
<td>505.00</td>
<td>467.00</td>
</tr>
<tr>
<td><strong>Germany</strong></td>
<td>2012</td>
<td>459.33</td>
<td>405.52</td>
</tr>
</tbody>
</table>

Explore data at the IFOAM/IFOAM-EU Stand in Hall 1/447
Explore data at the IFOAM/IFOAM-eU Stand in Hall 1/447
Summary

› In 2014 organic farming continued to grow: More organic farmland, more producers, market growth.
› Exceptional developments in countries such as Sweden and Norway, show that the outlook on the organic markets continues to be good; there is scope for further growth.
› For all major markets growth occurred also in 2015; however, the development of the organic farmland does not keep pace.
› For better monitoring of the development of the sector, data collection and processing need to be improved in many countries, in particular for market and international trade data.
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