



The Organic Market in Europe 2017: Current Statistics

Helga Willer and Julia Iernoud

The Global Organic Market. BIOFACH Congress 2019

Nuremberg, Germany

February 14, 2019

Milestones 2018

- New EU organic regulation published; work on the implementation regulation in progress. New regulation will come into force in 2021
- Organic regulations passed in the Russian Federation, Ukraine and Belarus
- Proposal on the new Common Agricultural Policy (2021 to 2027) was launched.
IFOAM EU “the next CAP should reinforce this by better rewarding farmers for the public goods that they provide”
- According to first available data for 2018, the organic area and market continued to grow.

The World of Organic Agriculture 2019

www.organic-world.net

- The 20th edition of 'The World of Organic Agriculture', was published by FiBL and IFOAM – Organics International in February 2019.
- Data tables
- Country and continent reports
- Markets, standards, policy support

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Acknowledgements

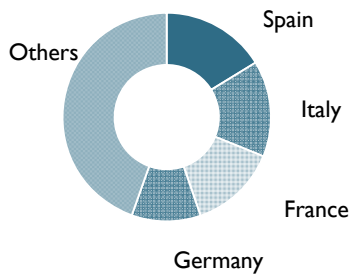
- Swiss State Secretariat of Economic Affairs SECO
- International Trade Centre ITC
- Coop Sustainability Fund
- NürnbergMesse, the organizers of BIOFACH
- IFOAM – Organics International
- More than 200 experts from all parts of the world contributed to the FiBL survey 2019.



EUROPE: ORGANIC FARMLAND 2017



Over half of Europe's organic farmland is in 4 countries.



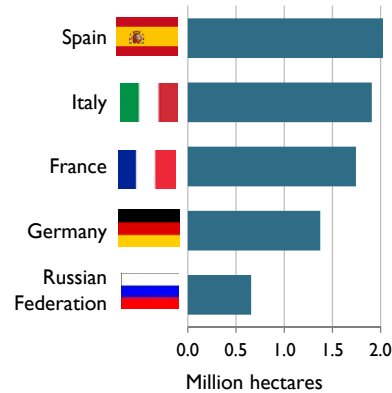
Distribution of organic agricultural land by country 2017



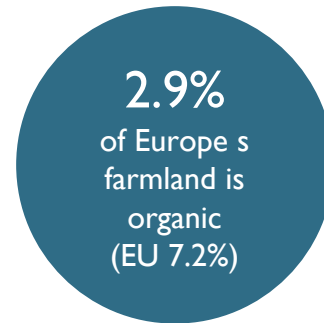
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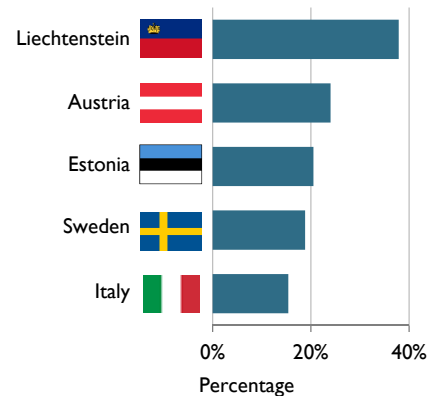
The country with the largest area of organic farmland is in Spain, followed by Italy and France.



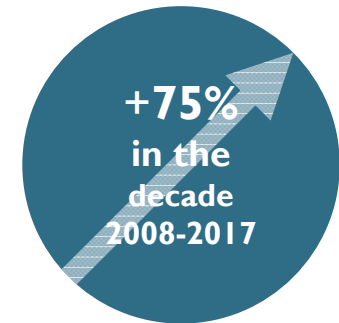
Top 5 countries with the largest areas of organic agricultural land 2017



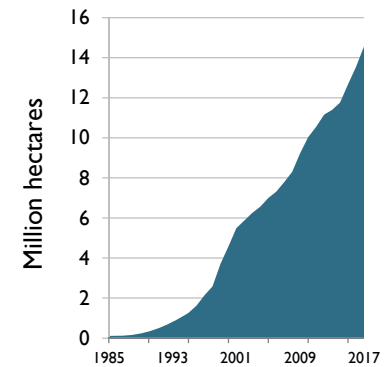
Ten countries have 10% or more of their agricultural land under organic management.



Top 5 countries, where more than 10 percent of the farmland is organic 2017



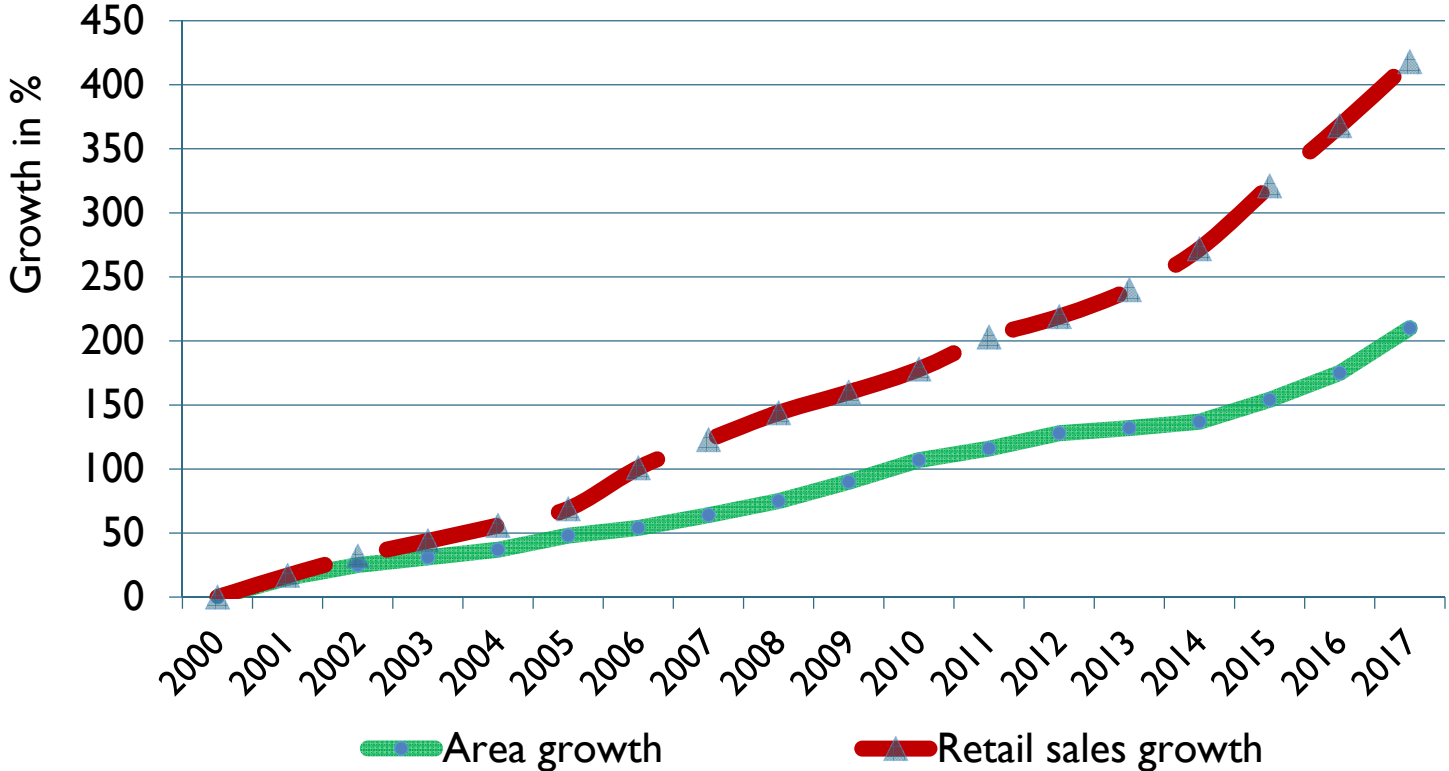
In 2017 over one million hectares more were reported compared with 2016.



Growth of the organic agricultural land 1985–2017

Europe: Market growth and area growth compared 2000-2017

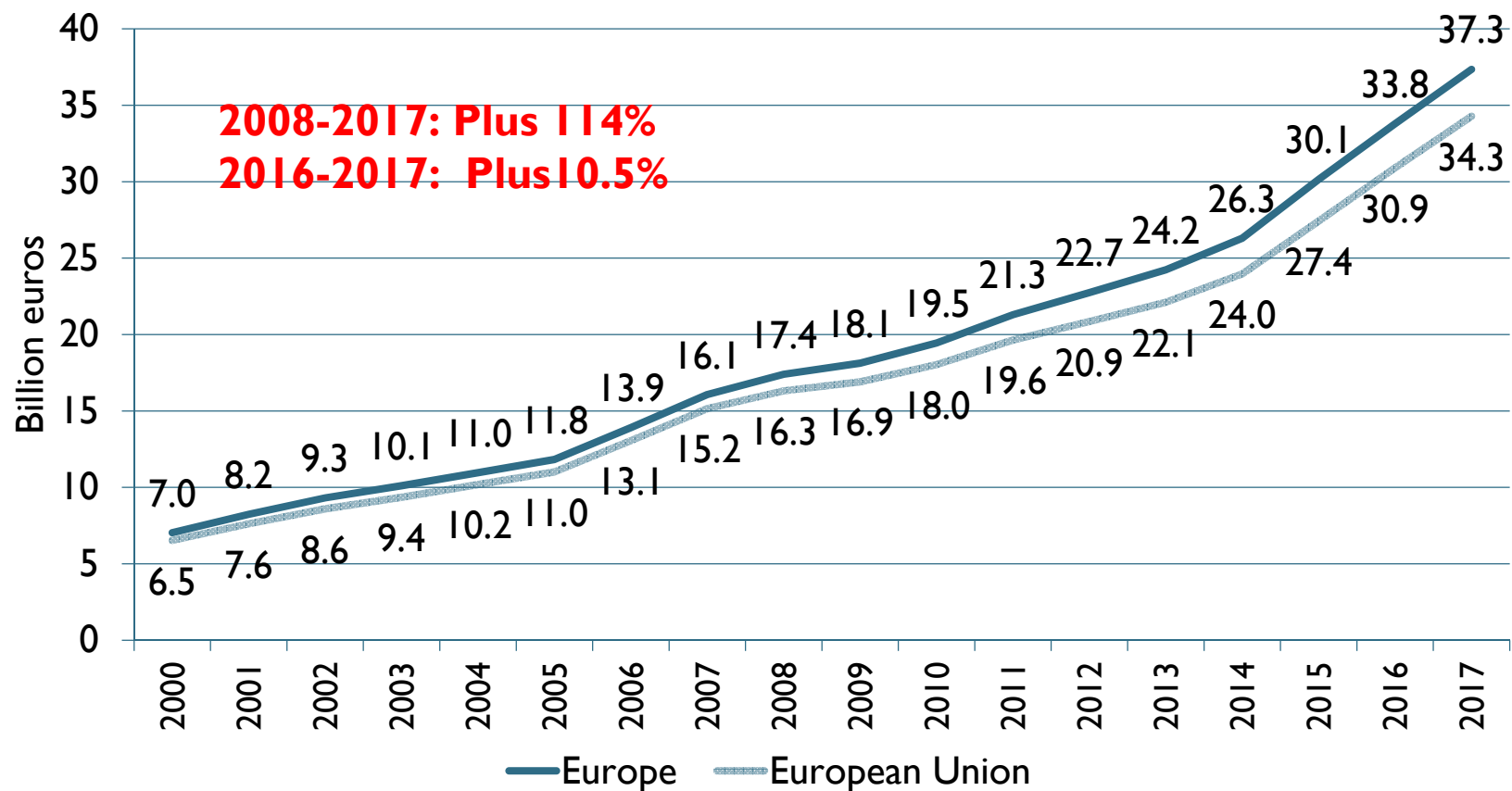
Source: FiBL/AMI



Europe and European Union: Development of retail sales 2000-2017

Europe and European Union: Development of retail sales 2000-2017

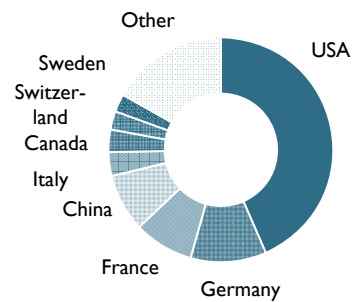
Source: FiBL-AMI Surveys 2006-2019, OrganicDataNetwork Surveys 2013-2015



EUROPE: ORGANIC RETAIL SALES 2017



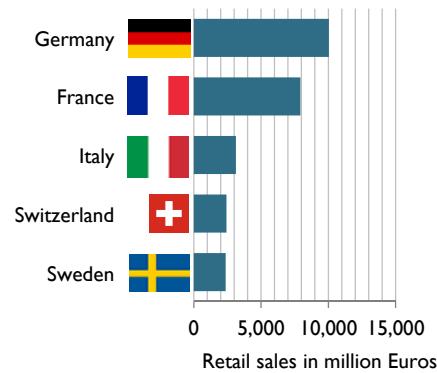
The European Union (34.3 billion €) is the second largest single market after the US (40 billion) and China. By region, North America has the lead (43 billion €), followed by Europe and Asia.



Distribution of retail sales value worldwide by country 2017



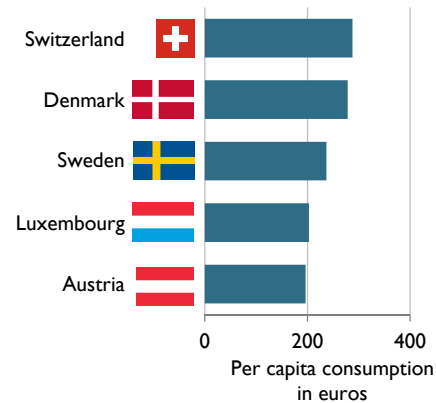
The European countries with the largest markets for organic food are Germany, France (7.9 billion €), Italy (3.1 billion €), and Switzerland (2.4 billion €).



The countries with the largest markets for organic food 2017



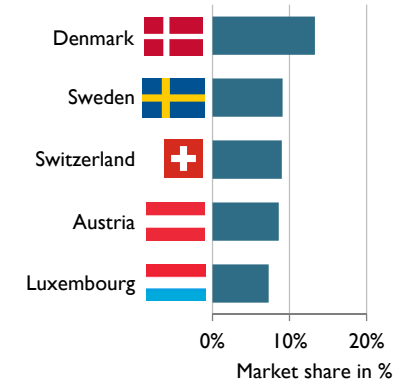
Switzerland has the highest per capita consumption of organic food worldwide, followed by Denmark and Sweden.



The countries with the highest per capita consumption of organic food 2017



The highest organic share of the total market is in Denmark, followed by Sweden, Switzerland, Austria, and Luxembourg.

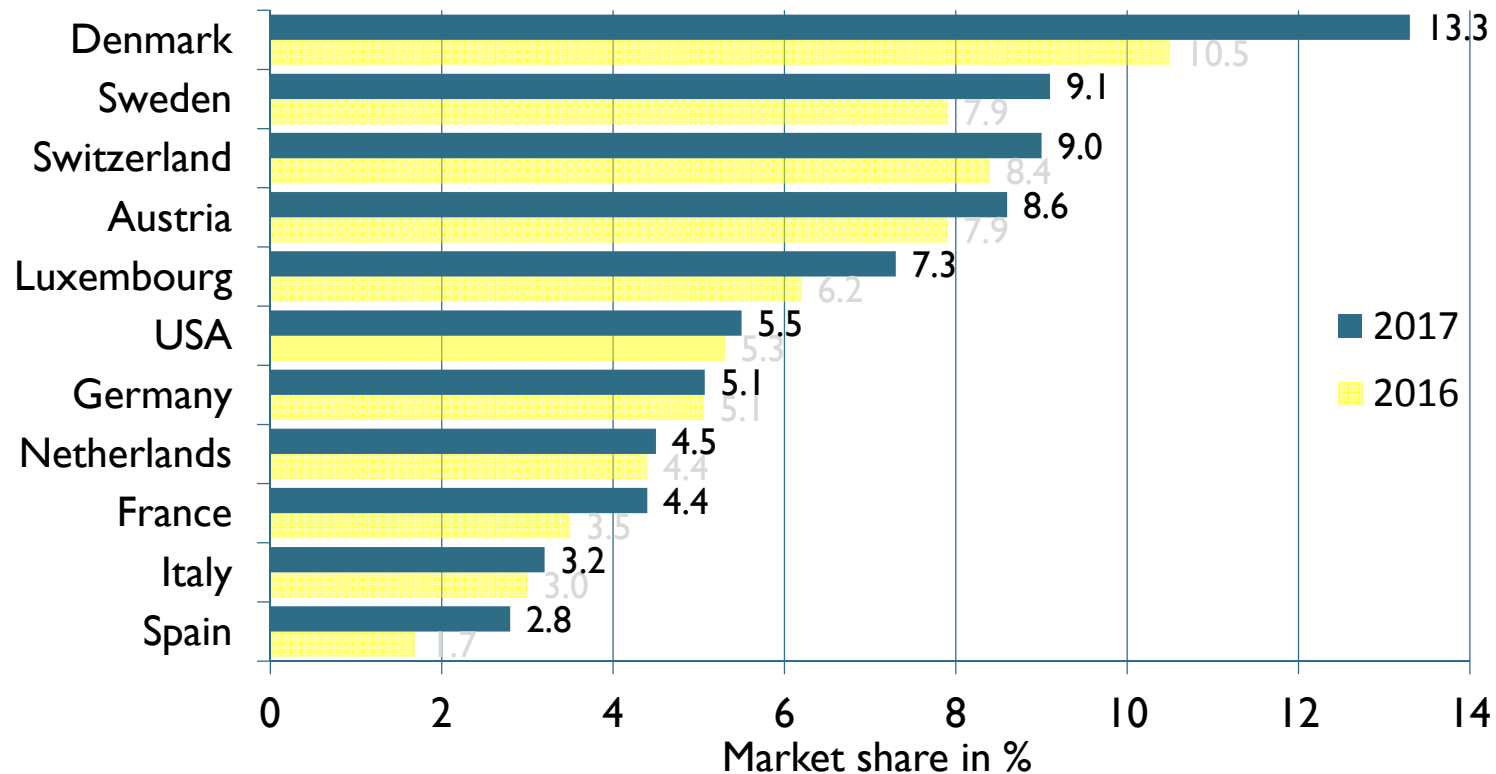


The countries with the highest organic shares of the total market 2017

Europe: Organic market shares

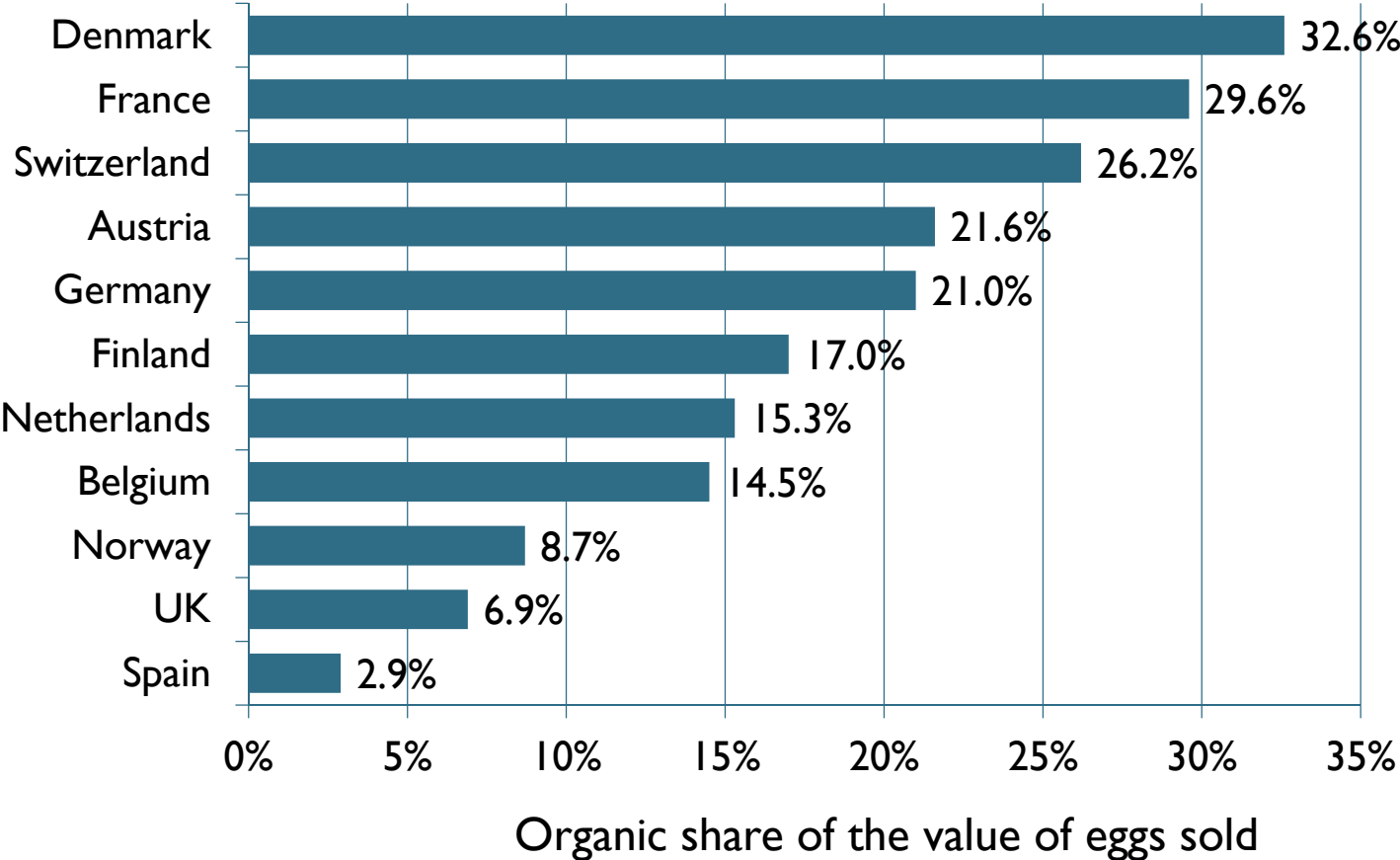
Europe: The countries with the highest organic shares of the total market 2016 and 2017

Source: FiBL-AMI survey 2019



Organic market shares of eggs

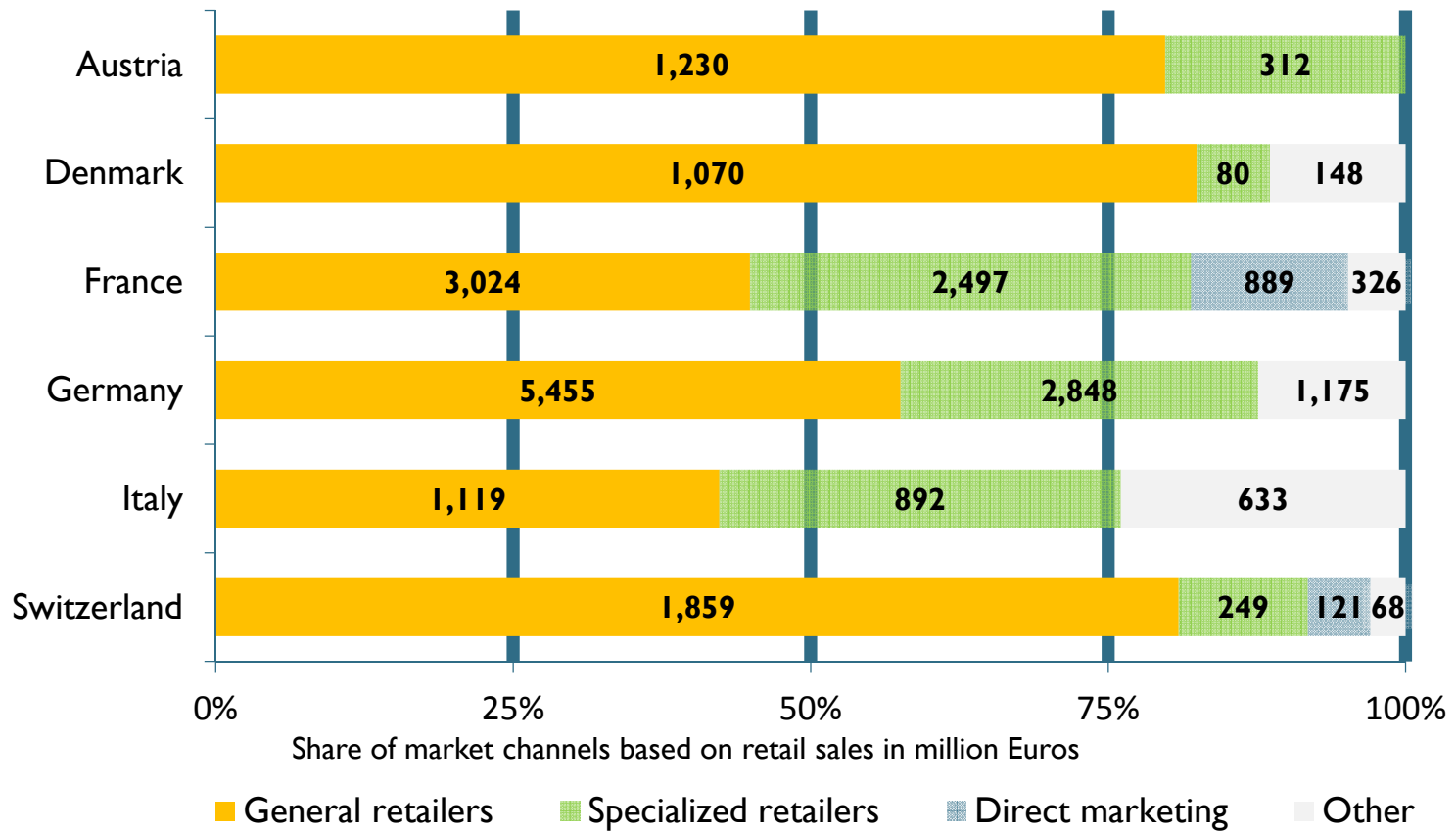
Source: FiBL-Erhebung 2019



Organic retail sales by channel

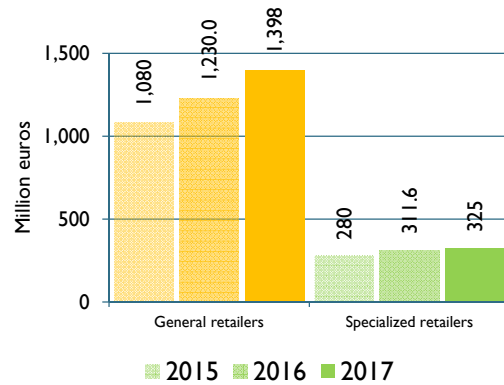
Organic retail sales by channel

Compiled by FiBL und AMI based on national data sources

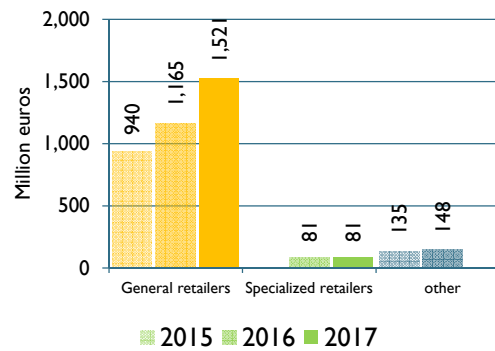


Organic marketing channels 2015-2017 (AT, CH, DE, DK, FR, IT)

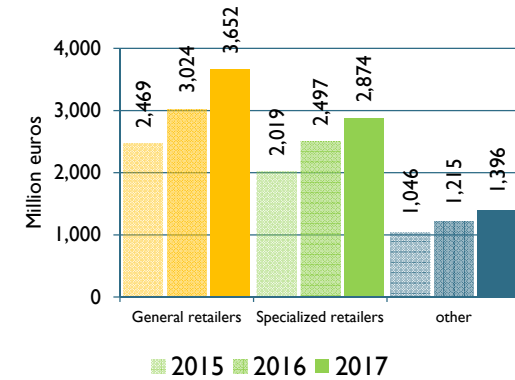
Austria



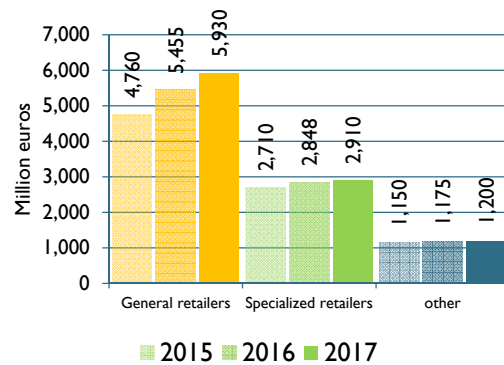
Denmark



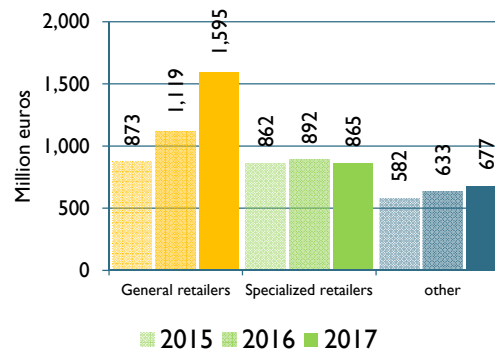
France



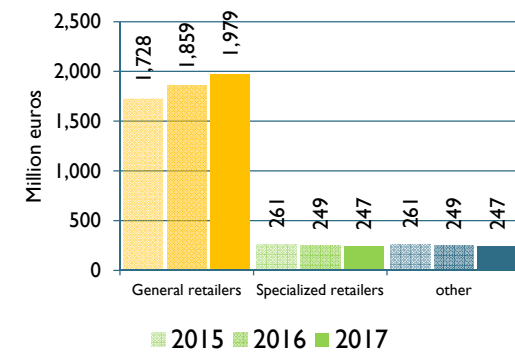
Germany



Italy



Switzerland





Future Policy Award 2018 (FPA) in silver for Denmark's organic action plan

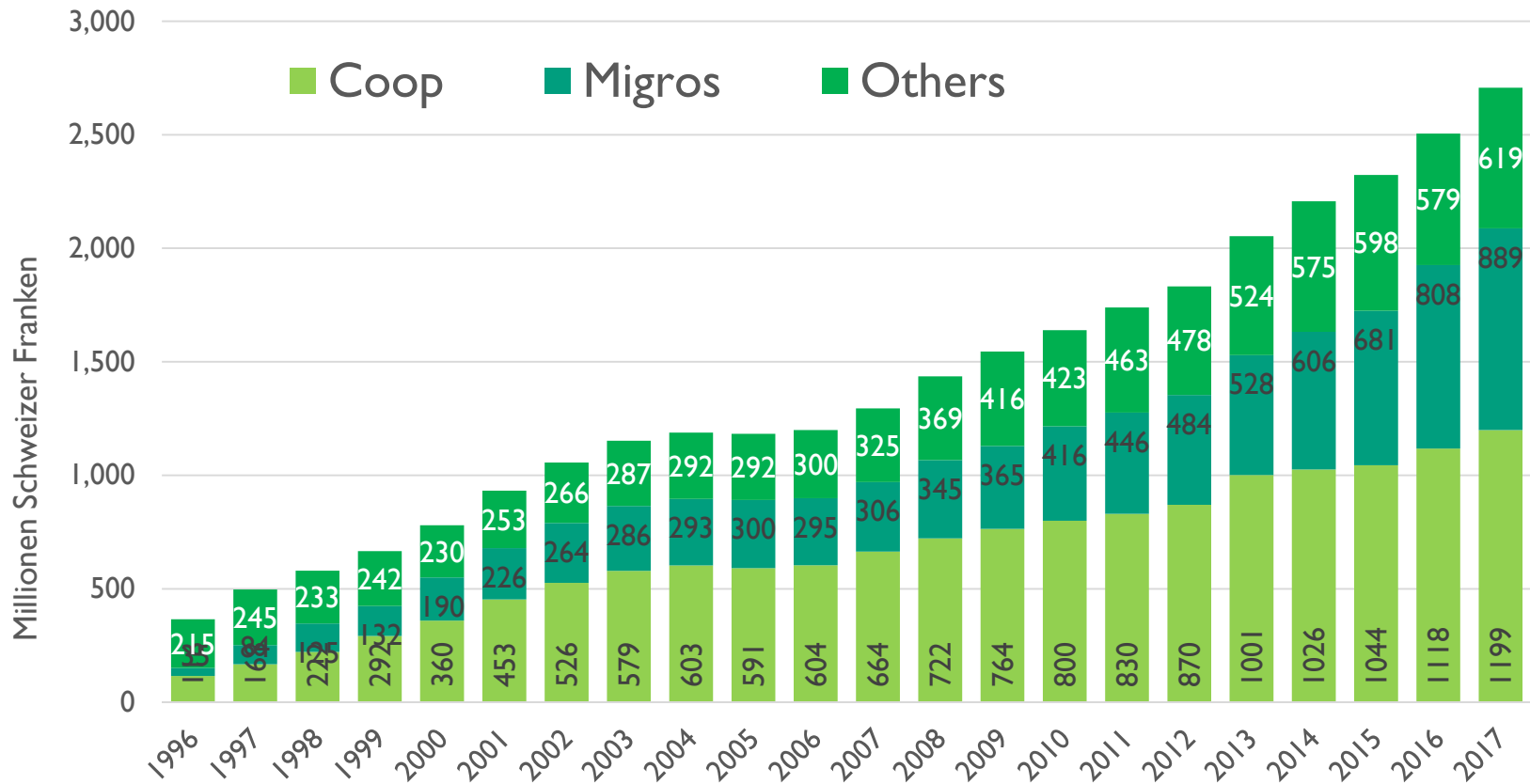
Denmark's Organic Action Plan, which has become a popular policy planning tool in European countries over the last decade, received the Future Policy Award 2018 in Silver.

Almost 80 percent of Danes purchase organic food and today the country has the highest organic market share in the world (13 percent).

“What has made Danish consumers among the most enthusiastic organic consumers [in the world], is that we have done a lot of **consumer information and we have worked strategically with the supermarkets** to place organics as part of their strategy putting more value into food through organics,” Paul Holmbeck, Political Director of ‘Organic Denmark’, said.

Source: FAO press release of October 31, 2018, <http://www.fao.org/agroecology/slideshow/news-article/en/c/1157015/>

Switzerland: Development of marketing channels for organic products 1996-2017



Source: Bio Suisse, www.biosuisse.ch

Switzerland: Partnership Coop with Bio Suisse

Bio Suisse

Bio Suisse ist der Dachverband der Schweizer Bio-Produzenten und Eigentümerin der Marke Knospe. Die Marke Knospe zertifiziert Bio-Produkte nach strengen Richtlinien. Mit Naturaplan sind wir enge Partnerin von Bio Suisse und lassen unsere Produkte mit dem Gütesiegel zertifizieren.

Die Philosophie von Bio Suisse



Eines der strengsten Bio-Gütesiegel.



Bio-Sortiment von A bis Z



Grösste Bio-Auswahl im Detailhandel.



Strengste Bio-Richtlinien



Hohe Anforderungen an Bio-Produkte.



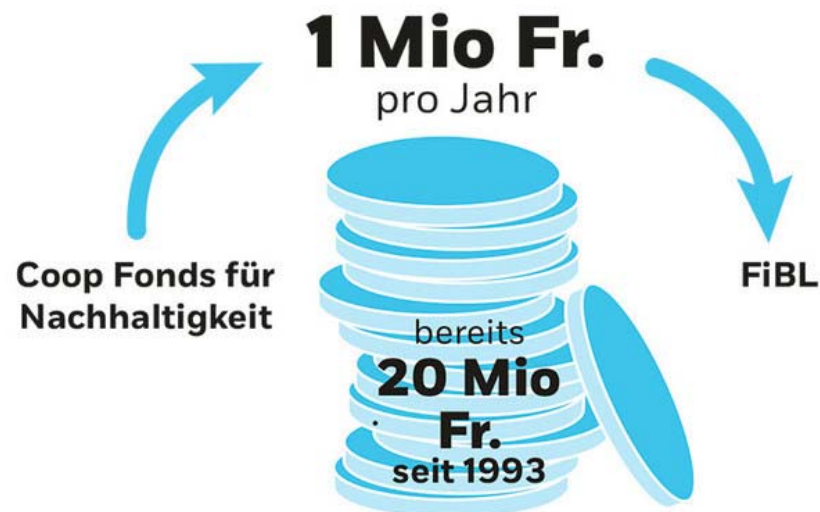
FiBL projects funded by Coop

<https://www.coop.ch/content/taten-statt-worte/en/sustainability-topics/society/coop-sustainability-fund/projects-with-the-research-institute-of-organic-agriculture-fibl.html>



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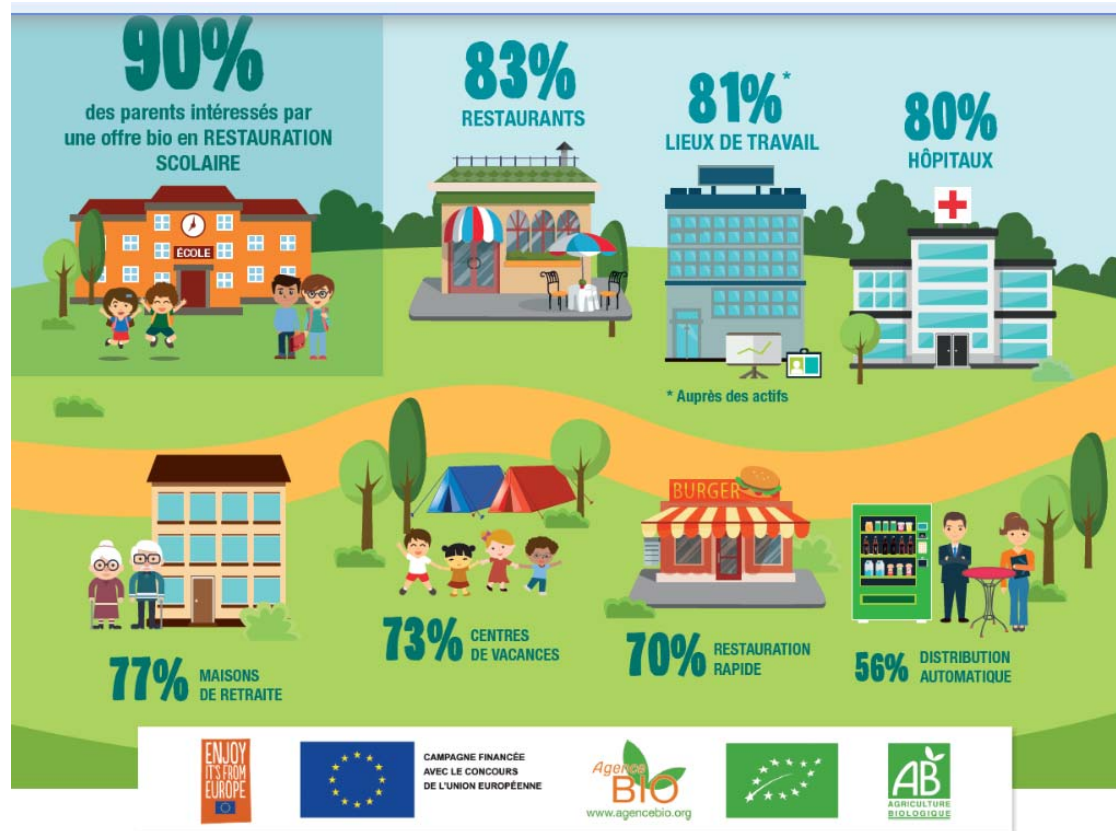
QUELLE COOP INFOGRAFIK CAROLINE KOELLA

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Where do you want to buy organic food?

(Agence Bio 2018)



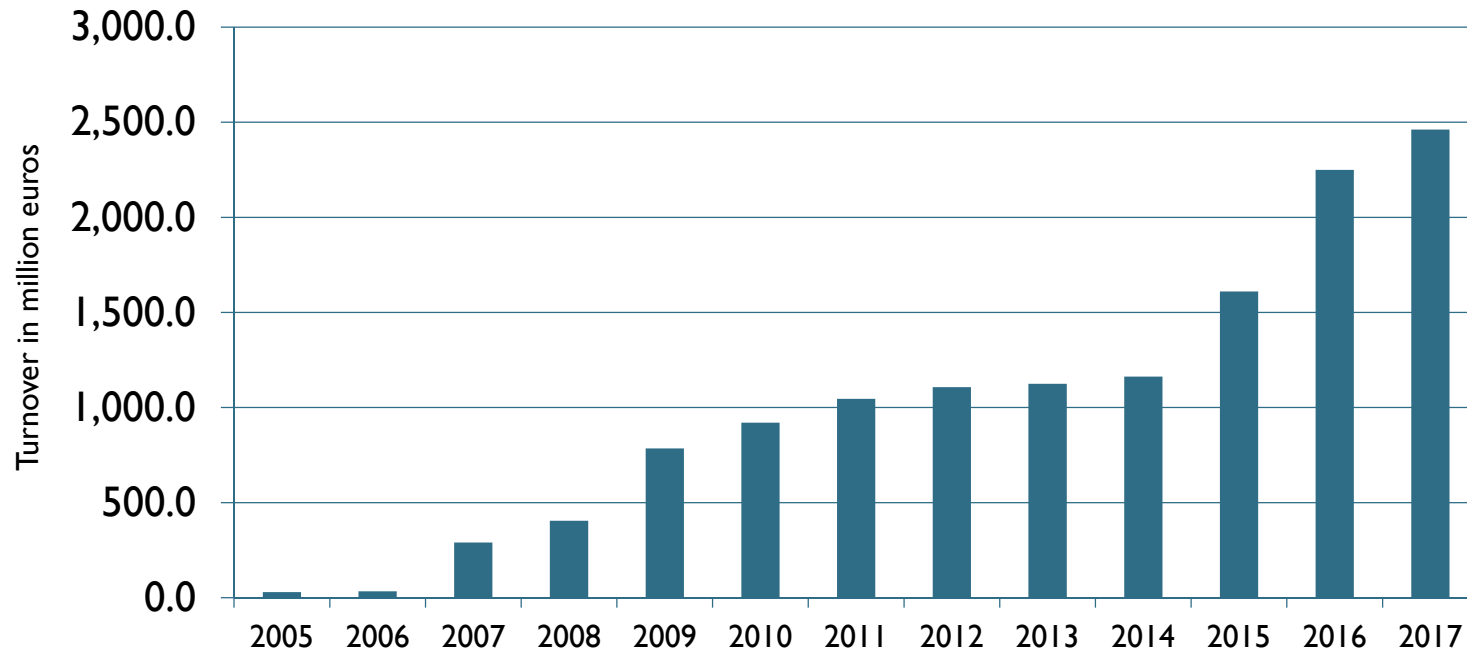
Source : Baromètre consommation Agence Bio / CSA Research Janvier 2018

Etude menée par Internet, via l'Access Panel grand public CSA Buzz, du 16 au 22 novembre 2017, auprès d'un échantillon représentatif de 1002 Français âgés de 18 ans et plus, constitué d'après la méthode des quotas.

Organic catering sales: Growth

European Union: Development of organic catering 2010-2017 (prov) (12 countries)

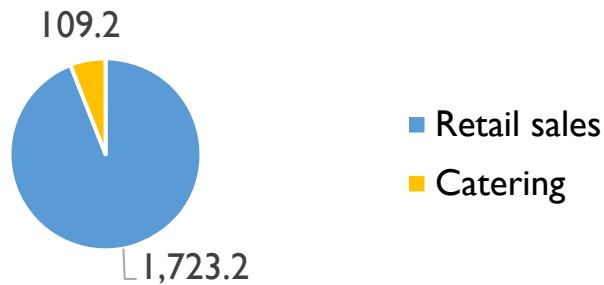
Source: FiBL-AMI survey 2018, based on national data sources and Eurostat



Catering/foodservice sales and their importance for the domestic market

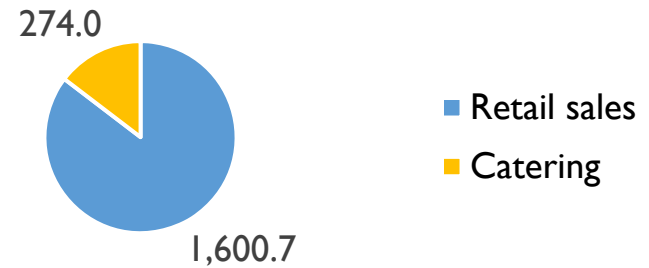
Austria: Retail and catering sales 2017 (Mio. Euros)

Source: AMA



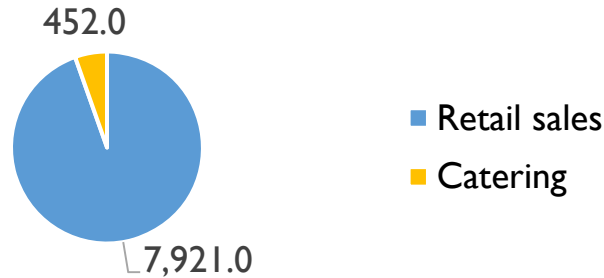
Denmark: Retail and catering sales 2017 (Mio. Euros)

Source: Statistics Denmark



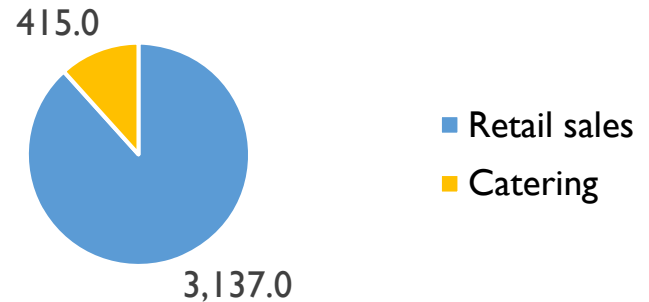
France: Retail and catering sales 2017 (Mio. Euros)

Source: AgenceBio



Italy: Retail and catering sales 2017 (Mio. Euros)

Source: Nomisma



Denmark: Organic Cuisine label

Organic Cuisine Label

31. July 2017

In 2009, The Ministry of Food Agriculture and Fisheries introduced labels for the marketing of organic food in large-scale kitchens, restaurants, cafés, hospitals, schools and larger businesses. Today, 2.000 eating places use the Organic Cuisine Label.



Denmark: The kitchen project

The Organic Action Plan 2020 - The Kitchen Project

1. Organic spearhead municipalities



2. Training of kitchen staff



3. Securing supply with organic food

HØRKRAM
FOODSERVICE CHEFS GULNÅK



 **Ministry of Environment and Food of Denmark**
Danish Veterinary and Food Administration

4. Promotion of the Organic Cuisine Logo



Conclusions

- The organic area and market continues to grow at a fast pace in Europe and worldwide.
- Currently the area is growing faster than in the past, thus the potential is there to meet the demand of the market better. Imports play an important role in many countries.
- In some countries, the organic market shares have reached around 10 percent; for individual products they can be even higher.
- In most countries, general retailers are the most important and fastest growing marketing channel.
- Partnerships between producer/sector organisations and supermarkets are essential in order to develop the sector as a whole.
- Out of home consumption marketing channels need to be developed – Denmark is a good example.
- More and better data are needed!

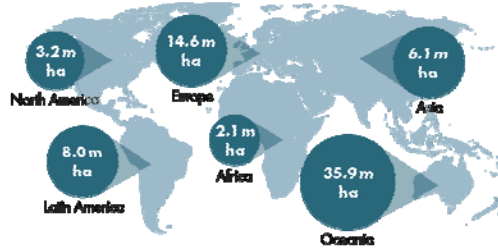
Resources

- «The World of Organic Agriculture» at www.organic-world.net
- Slides and infographics at www.organic-world.net
- [Twitter.com/fiblstatistics](https://twitter.com/fiblstatistics)
- Interactive maps at www.organic-world.net
- Interactive data tables at statistics.fibl.org
- Interactive map at www.ifoam-eu.org
- Presentation online
- **www.organic-world.net**

Thank you very much for your attention!

The World of Organic Agriculture 2017

Organic Farmland 2017

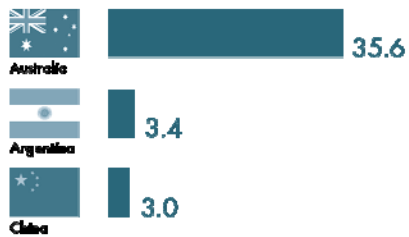


69.8 m ha Organic farmland in million hectares

+20% From 2016

181 Countries with organic farming

Top 3 countries (land in million of hectares)



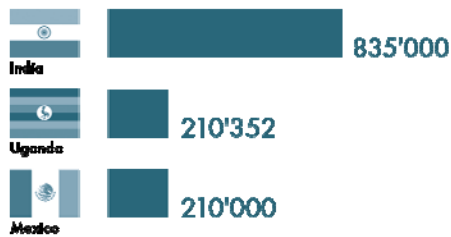
Organic Producers 2017

The number of organic producers is increasing

2.9 million Organic farmers

+4.7% From 2016

Number of producers: Top 3 countries

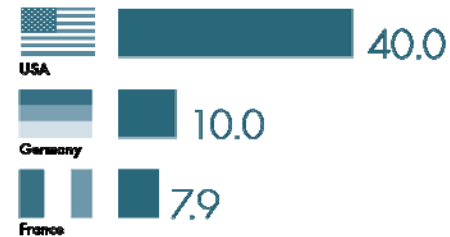


Organic Market 2017

The global market is growing and consumer demand is increasing

More than 92 Global organic food market in billion euros

Top 3 countries (market in billion euros)



18.0% Organic market growth

13.3% Market share

288 € Highest per capita spending is in Switzerland

Source: FiBL survey based on national sources
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More information: www.organic-world.net - statistika.fibl.org

Presentations at www.organic-world.net

Organic World

Global organic farming statistics and news

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The World of Organic Agriculture at BIOFACH 2018

The session on global organic farming and market trends will take place from 4 pm to 4.45 pm, on February 14, 2018 at BIOFACH, NürnbergMesse, Nürnberg, Germany.

(05/01/2018) At this session, the latest data on organic agriculture worldwide, regulations and organic markets will be presented and the 19th edition of The World of Organic Agriculture, the yearbook on global organic agriculture, will be launched.

Presenter

> Markus Arbenz, Executive Director, IFOAM - Organics International, Germany

Speakers

- > Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, Switzerland
- > Julia Lernoud, Research Institute of Organic Agriculture FiBL, Switzerland
- > Beate Huber, Research Institute of Organic Agriculture FiBL, Switzerland
- > Amarjit Sahota, President Ecovia Intelligence, UK
- > Barbara Jäggin, SECO, Swiss Cooperation Office, Switzerland

Further information

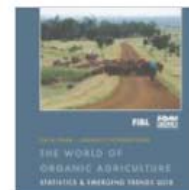
Contact

✉ [Helga Willer](mailto:Helga.Willer@fibl.org), FiBL, Frick, Switzerland

Link

> BIOFACH.de: www.organic-world.net [The World of Organic Agriculture at BIOFACH 2018](http://www.organic-world.net)

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World

Data on organic agriculture world-wide

Content

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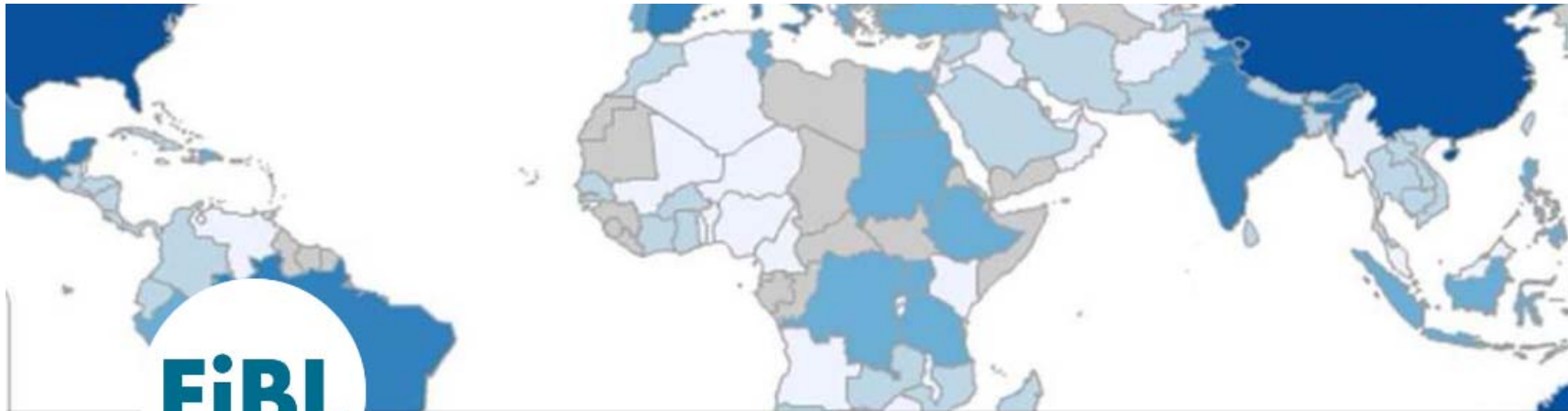
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Organic farming statistics & country news from around the world, provided by the Research Institute of Organic Agriculture FiBL fibl.org @fiblorg

📍 Frick, Switzerland

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📅 Se unió en abril de 2015



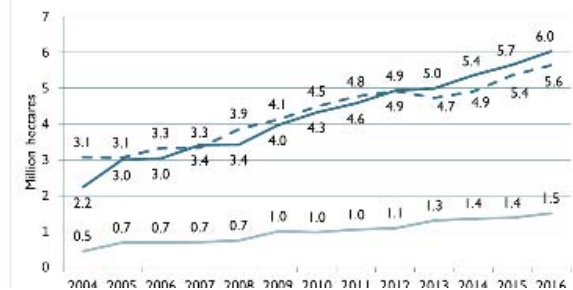
Tweets Tweets y respuestas Multimedia

FiBL **FiBL Statistics** @FiBLStatistics · 1 feb.
Organic arable crop area grew to 6 million hectares in 2016 (+7%). More information on organic farming in Europe is available in the 2018 edition of the [#WorldofOrganic](http://WorldofOrganic.net), European data launch @BioFachVivanes organic-world.net/index/news-org...

🌐 Traducir del inglés

Europe: Growth of area by land use type 2004-2016

Source: FiBL-AMI survey 2004-2018



Tu actividad de Tweets

Tus Tweets consiguieron **4.448 impresiones** durante la última semana



Mira tus Tweets destacados

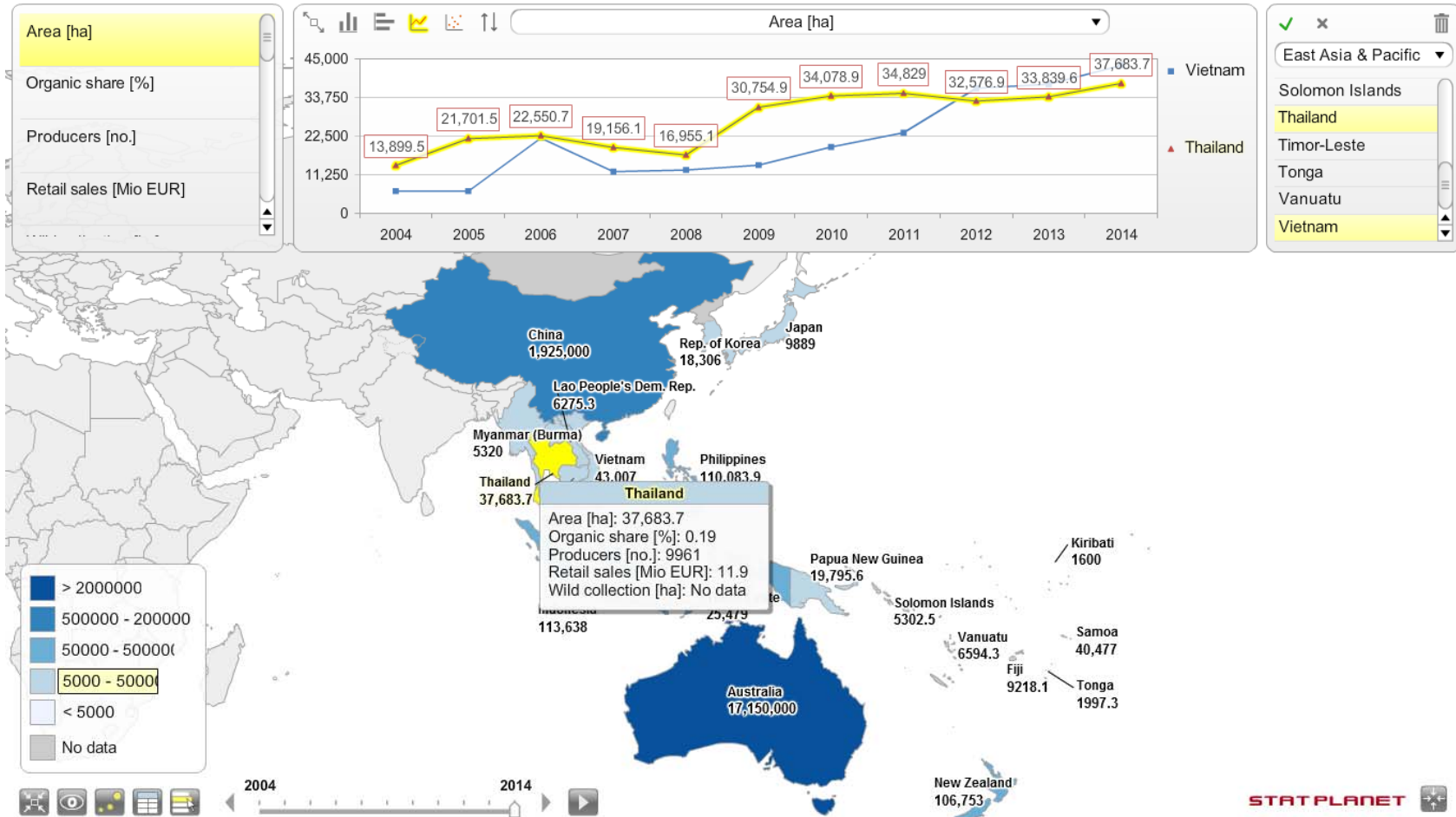
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- Andre Leu** @Andreleu1 [Seguir](#)

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Europe and the European Union: Key indicators 2017

Table 53: Europe and the European Union: Key indicators 2017

Indicator	Europe	European Union	Top 3 countries Europe
Organic farmland in hectares	14.6 million ha	12.8 million ha	Spain (2.1 million ha) Italy (1.9 million ha) France (1.7 million ha)
Organic share of total farmland	2.9 %	7.2 %	Liechtenstein (37.9%) Austria (24.0%) Estonia (20.5%)
Increase in organic farmland 2016-2017 in hectares	1.0 million ha	0.8 million ha	Russia (+341'778 ha) France (+206'373 ha) Germany (+121'837ha)
Relative increase in organic farmland 2016-2017	7.6%	6.4%	Russia (+108 %) Malta (+80%) Bosnia and Herzegovina (+28%)
Land use [in million hectares]	Arable crops: 6.8 Permanent crops: 1.6 Permanent pastures: 5.9	Arable crops: 5.5 Permanent crops 1.4 Permanent pastures: 5.7	
Top arable crop groups	Cereals: 2.5 million ha Green fodder: 2.4 million ha Oilseeds: 0.4 million ha	Green fodder: 2.2 million ha Cereals: 2.0 million ha Dry pules: 0.4 million ha	Largest arable areas: France (0.9 million ha) Italy (0.8 million ha) Russia (0.6 million ha)
Top permanent crop groups	Olives: 0.6 million ha Grapes: 0.3 million ha Nuts: 0.3 million ha	Olives: 0.5 million ha Grapes: 0.3 million ha Nuts: 0.3 million ha	Largest permanent crop areas: Spain (0.5 million ha) Italy (0.5 million ha) Turkey (0.2 million ha)
Wild collection area	18.0 million ha	14.7 million ha	Finland (11.6 million ha) Romania (1.8 million ha; 2014) Macedonia, FYR (1.2 million ha)
Producers [no.]	397'509	305'394	Turkey: (75'067) Italy (66'773) Spain (37'712)
Processors [no.]	71'375	68'164	Italy (18'092) Germany (15'019 149.65) France (14'859)
Importers [no.]	5'314	4'585	Germany (1'692) Switzerland (548) Netherlands (385)
Retail sales	37.3 billion euros	34.3 billion euros	Germany (10'040 million euros) France (7'921 million euros) Italy (3'137 million euros)
Growth of retail sales 2016-2017	10.5%	10.9%	France (18 %) Spain (16 %) Denmark, Liechtenstein (15%)
Organic share of total market	No data	No data	Denmark (13.3 %) Sweden (9.1%) Switzerland (9.0 %)
Per capita consumption [euros]	47 euros	67 euros	Switzerland (288 euros); Denmark (278 euros) Sweden (237 euros)

Source: FiBL-AMI survey 2019.
For detailed data sources see annex.