UPDATE ON ORGANIC VITICULTURE IN EUROPE

Helga Willer[1]

Statistical situation

In the past years the statistical information on organic grape production has improved considerably, at least as regards to the organic grape area. Almost all European countries - mainly the governments and in some cases the private sector organisations - make data available. Eurostat, the statistical office of the European Union, compiles the basic data, gathers the data from the European Union member states and makes them available at its website. However, data on the production volume as well as further market data like retail sales and import and export data are still scarce. This paper presents the data for 2011, as the complete dataset for 2012 was not ready at the time of writing. At the IFOAM Organic World Congress, the latest data available then will be presented.

Organic grape area

According to a survey of the Research Institute of Organic Agriculture (FiBL), at the end of 2011 more than 230’000 hectares of organic grapes were grown in Europe (European Union: 217’000 hectares). The largest areas are in Spain, France and Italy (Figure 1). One third of Europe’s organic grape area is in Spain. Most of the organic grapes are grown for wine, even though in Turkey a large part of the production is used for raisins.

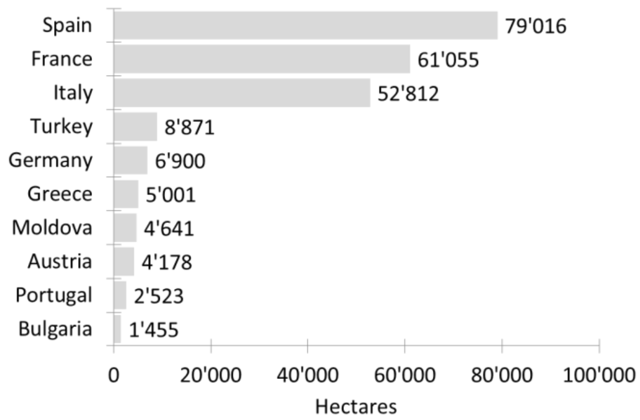

Figure 1: Organic grape area in in Europe: The ten countries with the largest grape areas 2011

Source: FiBL Survey 2013, based on information of Eurostat and national data sources

[1] Helga Willer, Research Institute of Organic Agriculture FiBL, Ackerstrasse, CH-5070 Frick, www.fibl.org, www.organic-world.net

Share of all vineyards

In Europe, 5.6 percent of the organic grape area is organic, in the European Union it is even 6.6 percent. This is a higher share than for the overall agricultural land in the European Union (5.4 percent in 2011). Some smaller producers that are not traditional grape-growing countries like the UK or the Netherlands have very high shares, but also the key growers have high shares of the total grape area like Spain, Franc, and Italy (Table 1). In most cases, the share of the organic grape area is higher or similar to that for organic agriculture area as a whole. An exception is Switzerland, where only 2.5 percent of the grape area is organic, whereas almost twelve percent of the country's total farmland is organic.

Table 1: Organic Viticulture in Europe 2011

Country	Area [ha]	Organic share [%]
Albania	35.0	0.4
Andorra	4.0	_
Austria	4'178.0	9.5
Belgium	1.0	10.0
Bosnia and Herzegovina	8.1	0.2
Bulgaria	1'454.7	1.9
Croatia	625.3	1.9
Cyprus	203.6	2.4
Czech Republic	978.3	6.1
Denmark	12.0	_
Finland	1.0	_
France	61'055.2	8.0
Germany	6'900.0	6.9
Greece	5'001.0	4.8
Hungary	1'207.0	1.6
Italy	52'811.9	7.3
Kosovo	1.0	_
Liechtenstein	2.0	_
Luxembourg	22.2	1.8
Malta	4.6	0.3
Moldova	4'641.4	3.6
Netherlands	29.0	14.6
Poland	22.0	_
Portugal	2'523.0	1.4
Romania	842.0	0.5
Serbia	7.0	0.0
Slovakia	68.0	0.7
Slovenia	287.0	1.8
Spain	79'016.4	7.9
Switzerland	368.5	2.5
The former Yugoslav Republic of Macedonia	40.7	0.2
Turkey	8'871.1	1.9
Ukraine	84.0	0.1
United Kingdom	107.0	16.7
Total Europe	**231'413.1**	**5.6**
Total European Union	**216'724.9**	**6.6**

Source: FiBL survey 2013, based on information of Eurostat and national data sources. Percentages calculated on the basis of data from FAOSTAT

Conversion status

Apart from Austria, Germany, Portugal, and Switzerland, all other major grape producing countries have data on the conversion status of the organic vineyards. According to these data, more than 100'000 hectares of the 230'000 hectares are under conversion. As it may be assumed that in most countries the grapes under conversion are not used for the production of wine to be sold as organic, a major increase in the supply of organic wines may be expected in the coming years.

Development

In recent years, organic viticulture has gained more and more importance. After a period of stagnation from 2001 to 2004, mainly due to a slow development in Italy and even decreases of organic vineyards there, the area is currently growing fast. Double-digit growth rates have been achieved annually since 2008 (2008: +26 percent; 2009: +30 percent; 2010: +15 percent; 2011: +20 percent; Figure 2). It is notable that the organic vineyards have exhibited far higher growth rates than the overall organic farmland which increased by 6 percent in 2011 and by 9 percent in 2010 (Willer and Lernoud 2013). For the European Union similar figures apply. Particularly in Spain and France growth was strong (Figure 3).

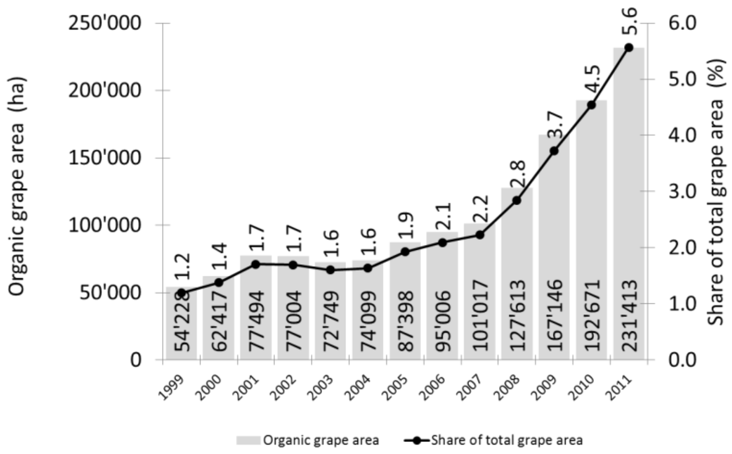

Figure 2: Development of organic viticulture in Europe 1999-2011

Source: FiBL survey 2013, based on information of Eurostat and national data sources

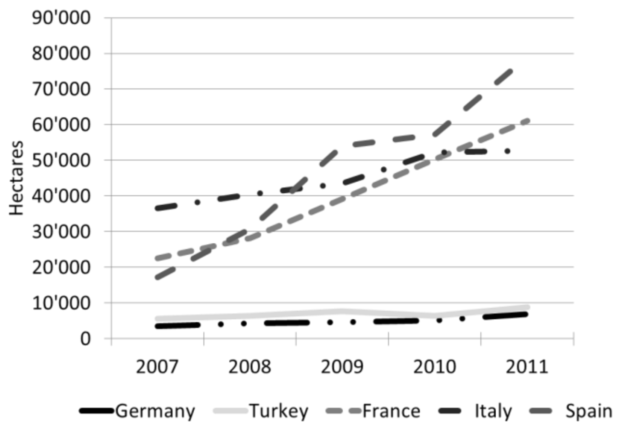

Figure 3: Development of organic viticulture in the five European countries with the largest organic vineyards 2007-2011

Source: FiBL survey 2013, based on information of Eurostat and national data sources

The fast development of organic grape in the European Union and in Europe must partly be attributed to the agri-environment programmes, but also to the growing market for organic food and beverages in Europe. This is not only the case in the northern parts of Europe; also in Spain for instance demand for organic wines is increasing. Whereas the technical challenges for organic grape production are not so high in Spain, growth in other countries can also be attributed to developments particularly in the area of crop protection or the increased use of fungi-resistant varieties.

European grape area in an international context

In a global context, Europe is far the largest player when it comes to organic vineyards: European organic vineyards constitute 89 percent of the global area under organic vines of 260’000 hectares (3.7 percent of all vineyards). The three major producers outside Europe are the United States (almost 12’000 hectares in 2008), Iran (5700 hectares) and Chile (4600 hectares) (Willer Lernoud 2013).

The market

In Europe, the organic market reached 21.5 billion euros in 2011 (European Union 19.7 billion euros). Growth rates were about 9 percent in 2011, but, due to the financial crisis, it was lower in the years prior to 2011 (Schaack et al. 2013).

Unfortunately, for organic wine almost no statics are available. For France, however, market data for wine are provided by Agence Bio (2013): In 2011, retails sales with organic grapes were at 360 million Euros, and thus constituted 9 percent of all organic products sold and 4 percent of all wine sold in the country. This was a higher share than for the total food market, where organic food sales constitute 2.3 percent. In Switzerland, one of the most developed organic markets in Europe (6.3 percent of the food market in 2012) the share of organic wines sold was comparatively low: 2.1 percent in 2012; however, the growth rate was 9.2 percent in that year. In the supermarket chain Coop, 3.6 percent of all wines sold were organic (BioSuisse 2013).

The fact that market shares for organic wines are not higher than outlined above, might partly be attributed to the circumstance that not all wine made from certified organic areas is sold as organic. This is the case for areas that converted for direct payments for vineyards. In some countries, direct payments play a bigger role than market prospects in incentivising grape growers to convert.

Conclusions

Organic wine is one of the key organic products, and the area under organic vines and demand for organic wine are continually increasing; especially area growth has been exceptional in the past five years. Some of the current key challenges include work on technological solutions in the field of plant protection, research on the effects of climate change on organic viticulture, as well as market development including work on consumers' acceptance of fungi-resistant varieties.

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