

## The Organic and Fairtrade Market 2015<sup>1</sup>

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In this chapter, an overview of the global organic and Fairtrade market is presented. The data shown here were taken from the Fairtrade International Annual Report (Fairtrade International 2016) and the annual FiBL survey on organic agriculture.

Since 2000, when the global market for organic food was at approximately 16.5 billion euros, it has more than quadrupled, reaching almost 76 billion euros in 2015, reflecting a major increase in the demand for organic products in just 15 years. According to Fairtrade International, global Fairtrade sales reached 7.3 billion euros 2015.

About 90 percent of the sales of organic and Fairtrade products are in Europe and North America. North America is the largest organic market, with over 50 percent of the global organic market, while Europe represents almost 80 percent of Fairtrade retail sales.

Data on total organic retail sales value is available for more than 50 countries, most of these developed countries, which means that for many countries with organic farming activities (179 in 2015), such data is missing. For Fairtrade, retail sales data is available for 32 countries, most of them in Europe

When analyzing retail sales data of organic and Fairtrade products, it is important to take into account that the variety of Fairtrade products is smaller than that of organic products. Currently, consumers can find almost all food products in organic quality, while the scope of Fairtrade products is smaller. When considering processed foods, another big difference emerges between organic and Fairtrade products. For a processed product to be labelled as organic, at least 95 percent of the ingredients of the final product need to be from organic-certified raw materials (IFOAM – Organics International 2014). In comparison, for a Fairtrade composite food product to carry the Fairtrade label, the product needs to have at least 50 percent of its ingredients Fairtrade-certified (Fairtrade International 2003).

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<sup>1</sup> All of the statements and results contained in this chapter have been compiled by the authors and are to the best of their knowledge correct and have been checked by the Research Institute of Organic Agriculture (FiBL). However, the possibility of mistakes cannot be ruled out entirely. Authors are responsible for the content of this article. Their opinions do not necessarily express the views of Fairtrade International.

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### Highlights and key data

#### *Market size:*

The global market for organic food (expressed in retail sales) was 75.7 billion euros in 2015. In 2015, Fairtrade retail sales were at 7.3 billion euros.

The country with by far the largest market for organic food is the United States (35.8 billion euros), followed by Germany (8.6 billion euros), France (5.5 billion euros), and China (4.7 billion euros). The countries with the largest market for Fairtrade-certified products were the United Kingdom (2.1 billion euros), Germany (978 million euros), and the United States (917 million euros) (Figure 52).

Comparing organic markets worldwide by single market, the United States has the lead: 47 percent of global organic retail sales are in this country (35.8 billion euros), followed by the European Union and China. For Fairtrade products, the European Union took the lead with over 70 percent of the global market, followed by the United States (almost 13 percent) and Switzerland (almost 7 percent).

On a regional level, North America continues to be the largest organic market (38.5 billion euros) followed by Europe (29.8 billion euros) and Asia (6.2 billion euros). Europe reported the largest market for Fairtrade-certified products with almost 80 percent of the global market, followed by North America with over 16 percent (Figure 51).

It is not possible to report a single global figure for Fairtrade and organic due to the fact that many products are double certified. Fairtrade International reports an up to 60 percent overlap in some commodities, for example coffee, and for bananas there is a 55 percent overlap.

#### *Market growth*

The organic market has more than quadrupled in only 15 years, and it has grown each year since 1999, even though a slow-down was noted for some countries during the financial crisis in 2008. The market for Fairtrade certified products has grown six-fold since 2004 according to the data collected from Fairtrade International annual reports.

In 2015, organic market growth was noted in all countries, and in some cases, growth was double-digit. For example, in Spain, the market grew by twenty-five percent, representing the biggest growth. In Ireland, the market grew by 23 percent, and, in Sweden, the market grew by 20 percent. Retail sales of Fairtrade certified products grew in almost all countries from which data was available. Some countries experienced growth rates of over 20 percent, such as Estonia (47 percent), the United States (33 percent), and Norway (25 percent).

#### *Per capita consumption*

Globally, 10.3 euros were spent per person on organic food, and 1 euro was spent per person on Fairtrade certified products.

The highest per capita consumption of organic products was registered in European countries: In 2015, Switzerland had the highest per capita consumption worldwide (262 euros), followed by Denmark (191 euros) and Sweden (177 euros). Switzerland also had

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the highest per capita expenditure on Fairtrade certified products in 2015 (57.7 euros) followed by Ireland (54.2 euros), Sweden (36.1 euros), and the United Kingdom (33.9 euros) (Figure 53).

### Market share

Unfortunately, values for total retail sales are not available for all countries. Using the data available, we see that the countries where organic products have the highest share of the total market are Denmark (8.4 percent), Switzerland (7.7 percent), Luxembourg (7.5 percent), and Sweden (7.3 percent). Regarding Fairtrade products, in 2015, Switzerland and Sweden were the countries with the highest share of the market, accounting for 1.7 percent and 1.5 percent of their total market, followed by Finland (1.3 percent) and Ireland (1.2 percent).

### Table and Graphs

**Table 1: Global market data: Organic and Fairtrade retail sales, share of all retail sales, per capita consumption, and market share, 2015**

It should be noted that for market and trade data, comparing country statistics remains very problematic, due to differing methods of data collection. Comments on this table should be sent to [helga.willer@fibl.org](mailto:helga.willer@fibl.org). Revisions will be posted at [www.organic-world.net/statistics/statistics-data-revisions.html](http://www.organic-world.net/statistics/statistics-data-revisions.html) and included into the FiBL database.

Region	Country	Retail sales: [Million €]		Retail sales: [€/person]		Retail sales: Growth value 1 year [%]		Retail sales: Share value [%]	
		Fair-trade	Organic	Fair-trade	Organic	Fair-trade	Organic	Fair-trade	Organic
Africa	Ethiopia		13		0.1				
	Kenya	0.1	4	0.003	0.1	16.0			
	South Africa	19		0.3		-11.0			
<i>Africa total</i>		<i>19</i>	<i>17</i>						
Asia	Azerbaijan		3		0.3				
	China		4'712		3				
	Hong Kong	3		0.4		16.0			
	India	1	130	0.001	0.1	16.0			
	Japan	74	1'000	0.6	7.8	7.0	0.1	1.0	
	Republic of Korea	5	281	0.1	5.6	16.0			
	Thailand		12		0.2				
	United Arab Emirates		113		12.3				
	Viet Nam		5		0.1				
<i>Asia total</i>		<i>83</i>	<i>6'255</i>	<i>0.02</i>	<i>1.5</i>				
Europe	Austria	185	1'065	21.6	127.0	24.0		1.1	6.5
	Belgium	115	514	10.2	45.7	10.0	18.0	0.6	2.7
	Bosnia and Herzegovina		0.3		0.03				
	Bulgaria		7		0.9				
	Croatia		99		23.4				2.2
	Cyprus		2		1.9				
	Czech Republic	9	74	0.8	7.0	16.0		0.0	0.7
	Denmark	102	1'079	18.1	190.7	9.0	12.0	0.80	8.4
	Estonia	3		2.5		47.0			
	Finland	174	240	31.7	43.9	7.0	6.7	1.3	1.8
	France	442	5'534	6.7	83.3	13.0	14.6	0.2	2.9
	Germany	978	8'620	12.0	105.9	18.0	11.1	0.5	4.8
	Greece		60		5.3				
Hungary		30		3.0					

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Region	Country	Retail sales: [Million €]		Retail sales: [€/person]		Retail sales: Growth value 1 year [%]		Retail sales: Share value [%]	
		Fair-trade	Organic	Fair-trade	Organic	Fair-trade	Organic	Fair-trade	Organic
	Ireland	251	142	54.2	30.7	10.0	23.0	1.2	0.7
	Italy	99	2'317	1.6	38.1	10.0	15.0	0.1	2.5
	Latvia	1	4	0.4	2.0	-27.0		0.04	0.2
	Liechtenstein		6		142.4				
	Lithuania	1	6	0.3	2.0	25.0		0.02	0.2
	Luxembourg	11	94	19.2	170.0	1.0	4.0	0.9	7.5
	Montenegro		0.1		0.2				
	Netherlands	223	1'072	13.2	63.4	4.0	11.5	0.9	4.3
	Norway	81	352	15.6	68.1	25.0	15.0	0.3	1.5
	Poland		167		4.4				
	Portugal	28	21	2.7	2.0	11.0		0.3	0.2
	Romania		80		3.7				0.7
	Russian Federation		120		0.8				
	Slovakia	1	4	0.2	0.7	16.0		0.1	0.2
	Slovenia		49		26.6				1.8
	Spain	28	1'498	0.6	32.3	11.0	24.8	0.03	1.5
	Sweden	349	1'726	36.1	177.1	19.0	20.3	1.5	7.3
	Switzerland	475	2'175	57.7	262.2	9.0	5.2	1.7	7.7
	Turkey		4		0.1				
	Ukraine		18		2.6				
	United Kingdom	2'193	2'604	33.9	40.2	-5.0	4.9	1.2	1.4
	<i>Europe total</i>	<i>5'749</i>	<i>29'781</i>	<i>7.0</i>	<i>36.4</i>				
Latin America	Belize		0.1		0.2				
	Brazil	0.1		0.001		16.0			
	Chile		2		0.1				
	Costa Rica		1		0.3				
	Mexico		14		0.1				
	Peru		14		0.5				
	<i>Latin America total</i>	<i>0.1</i>	<i>31</i>						
Northern America	Canada	273	2'757	7.6	76.7	16.0		0.3	2.8
	United States of America	917	35'782	2.9	111.2	33.0	11.0	0.1	5.0
	<i>Northern America total</i>	<i>1'189</i>	<i>38'539</i>	<i>3.3</i>	<i>107.7</i>				
Oceania	Australia	218	962	9.6	41.6	3.0			
	New Zealand		124		27.4				
	<i>Oceania total</i>	<i>218</i>	<i>1'085</i>	<i>5.5</i>	<i>27.6</i>				
	Other world		43						
	<b>World</b>	<b>7'300</b>	<b>75'709</b>	<b>1.0</b>	<b>10.3</b>				

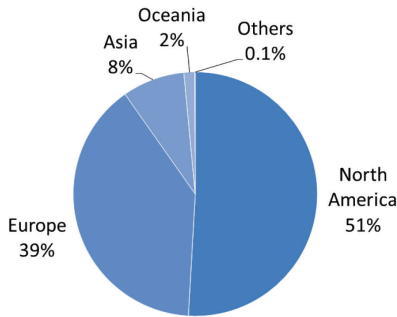
Source: Fairtrade data: Fairtrade International, Annual Report 2015-2016; Organic data: FiBL-AMI survey 2017.

\*Note: please note that the organic retail sales data for the following countries is not from 2015: Australia, 2013; Austria 2011; Azerbaijan, 2011; Bulgaria, 2010; Chile, 2009; Costa Rica, 2008; Croatia, 2014; Cyprus, 2006; Czech Republic, 2014; Greece, 2010; India, 2012; Japan, 2009; Latvia, 2011; Lithuania, 2011; Mexico, 2013; Montenegro, 2010; Peru, 2010; Portugal, 2011; Romania, 2011; Russia Federation, 2012; Slovakia, 2010; Slovenia, 2013; Thailand, 2014; Turkey, 2009

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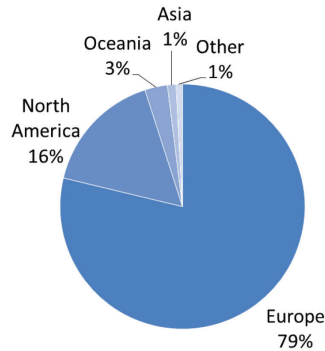
## Organic: Distribution of retail sales value by region 2015

Source: FiBL-AMI survey 2017, based on retail sales with organic food



## Fairtrade: Distribution of retail sales value by region 2015

Source: Fairtrade International 2016

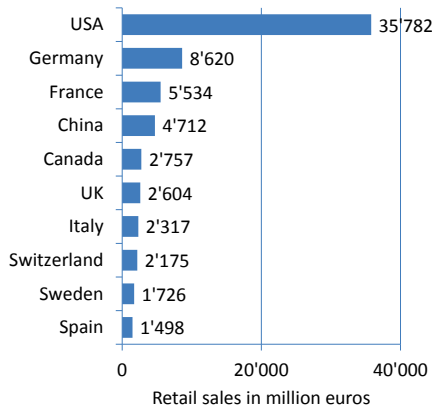


**Figure 1: Organic and Fairtrade: Distribution of retail sales value by region 2015**

Source: FiBL-AMI survey 2017, based on data from government bodies, the private sector, and market research companies.

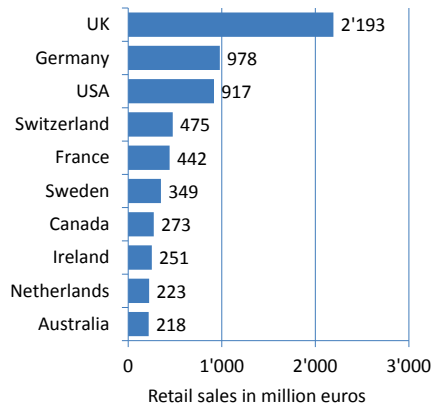
## Organic: The ten countries with the largest markets for organic food 2015

Source: FiBL-AMI survey 2017



## Fairtrade: Top 10 countries with the largest markets for Fairtrade food 2015

Source: Fairtrade International 2016



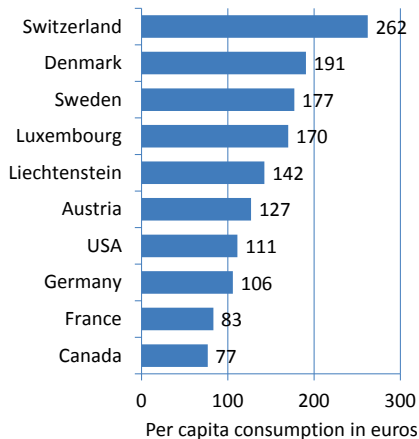
**Figure 2: Organic and Fairtrade: The ten countries with the largest markets for organic food 2015**

Source: FiBL-AMI survey 2017, based on data from government bodies, the private sector, and market research companies.

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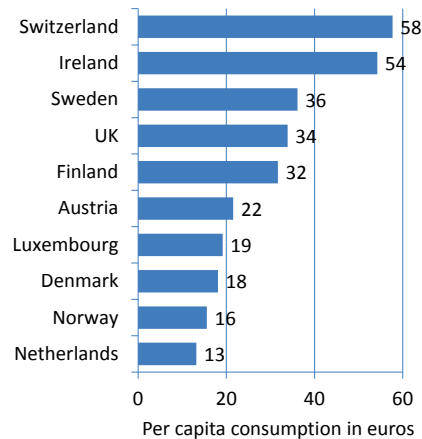
### Organic: The ten countries with the highest per capita consumption 2015

Source: FiBL-AMI survey 2017



### Fairtrade: The ten countries with the highest per capita consumption 2015

Source: Fairtrade International 2016



**Figure 3: Organic and Fairtrade: The ten countries with the highest per capita consumption 2015**

**Source: FiBL-AMI survey 2017, based on data from government bodies, the private sector, and market research companies.**

### References and further reading

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