Organic Agriculture in Europe: Current Statistics

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The European Market for Organic Food, BIOFACH Congress 2020
Nuremberg, Germany
February 12, 2020
The World of Organic Agriculture 2020
www.organic-world.net

- Data tables
- Country and continent reports
- Markets, standards, policy support
- Chapters on ICS, PGS, Demeter, EU imports

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Another record year for organic in Europe and worldwide - highlights 2018

- Organic agricultural land in Europe reached an all time high with 15.6 million hectares = + 8.7% (EU 13.8 million hectares)
- 3.1% of the agricultural land is organic, 7.7% in the EU
- In 10 countries 10 percent or more of the farmland is organic
- 0.4 million producers were reported – another all time high
- The market exceeded 40.7 billion euros, +7.8%
- The following slides show, where Europe stands in a global context (marked yellow)
Distribution of organic farmland 2018

Distribution of organic agricultural land by region 2018

Source: FiBL survey 2020

- Oceania: 50%
- Europe: 22%
- Latin America: 11%
- Asia: 9%
- North America: 5%
- Africa: 3%
- North America: 5%
- Africa: 3%
- Oceania: 50%
- Europe: 22%
- Latin America: 11%
- Asia: 9%
The ten countries with the largest areas of organic agricultural land 2018

Source: FiBL survey 2020

<table>
<thead>
<tr>
<th>Country</th>
<th>Million hectares</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>35.69</td>
</tr>
<tr>
<td>Argentina</td>
<td>3.63</td>
</tr>
<tr>
<td>China</td>
<td>3.14</td>
</tr>
<tr>
<td>Spain</td>
<td>2.25</td>
</tr>
<tr>
<td>Uruguay</td>
<td>2.15</td>
</tr>
<tr>
<td>France</td>
<td>2.04</td>
</tr>
<tr>
<td>United States of America</td>
<td>2.02</td>
</tr>
<tr>
<td>Italy</td>
<td>1.96</td>
</tr>
<tr>
<td>India</td>
<td>1.94</td>
</tr>
<tr>
<td>Germany</td>
<td>1.52</td>
</tr>
</tbody>
</table>
The countries with the highest shares of organic agricultural land 2018

Countries with an organic share of at least 10 percent of the agricultural land 2018

Source: FiBL survey 2020

The countries with the highest shares of organic agricultural land 2018

<table>
<thead>
<tr>
<th>Country</th>
<th>Organic Share</th>
<th>Total Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liechtenstein</td>
<td>38.5%</td>
<td>34.5%</td>
</tr>
<tr>
<td>Samoa</td>
<td>34.5%</td>
<td>24.7%</td>
</tr>
<tr>
<td>Austria</td>
<td>24.7%</td>
<td>22.5%</td>
</tr>
<tr>
<td>Sao Tome and Principe</td>
<td>22.5%</td>
<td>21.6%</td>
</tr>
<tr>
<td>Estonia</td>
<td>21.6%</td>
<td>19.9%</td>
</tr>
<tr>
<td>Sweden</td>
<td>19.9%</td>
<td>16.8%</td>
</tr>
<tr>
<td>Timor-Leste</td>
<td>16.8%</td>
<td>15.8%</td>
</tr>
<tr>
<td>Italy</td>
<td>15.8%</td>
<td>15.4%</td>
</tr>
<tr>
<td>Latvia</td>
<td>15.4%</td>
<td>15.4%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>15.4%</td>
<td>14.9%</td>
</tr>
<tr>
<td>Uruguay</td>
<td>14.9%</td>
<td>14.9%</td>
</tr>
<tr>
<td>Vanuatu</td>
<td>14.9%</td>
<td>13.7%</td>
</tr>
<tr>
<td>Finland</td>
<td>13.7%</td>
<td>13.0%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>13.0%</td>
<td>12.8%</td>
</tr>
<tr>
<td>French Guiana (France)</td>
<td>12.8%</td>
<td>10.1%</td>
</tr>
<tr>
<td>Slovakia</td>
<td>10.1%</td>
<td>10.0%</td>
</tr>
</tbody>
</table>
Growth of the organic agricultural land by continent
2010-2018
Source: FiBL-IFOAM survey 2012-2020
European Union: Growth of the organic farmland

EU: Growth of the organic agricultural land and organic share of total farmland 1999-2018
Source: FiBL-IFOAM-SOEL-Surveys 1999-2020 based on national data sources and Eurostat

Organic share in percent

Organic share in 2018: Plus 7.6%

www.fibl.org
Europe and European Union: Development of retail sales 2000-2018

Figure: Distribution of retail sales in Europe and worldwide

Global market: Distribution of retail sales value by country 2018
Source: FiBL-AMI survey 2020, based on retail sales with organic food

World: distribution of retail sales by single market 2018
Source: FiBL-AMI survey 2020

- USA: 42%
- EU-28: 39%
- China: 8%
- Canada: 3%
- Switzerland: 3%
- United Kingdom: 3%
- Italy: 4%
- France: 9%
- Germany: 11%
- Other: 5%
The ten countries with the largest markets for
organic food 2018
Source: FiBL-AMI survey 2020

- United States of America: 40,559 million euros
- Germany: 10,910 million euros
- France: 9,139 million euros
- China: 8,087 million euros
- Italy: 3,483 million euros
- Canada: 3,119 million euros
- Switzerland: 2,655 million euros
- United Kingdom: 2,537 million euros
- Sweden: 2,301 million euros
- Spain: 1,903 million euros
The ten countries with the highest per capita consumption 2018

Source: FiBL-AMI survey 2020

- Denmark: 312 euros
- Switzerland: 312 euros
- Sweden: 231 euros
- Luxembourg: 221 euros
- Austria: 205 euros
- Norway: 159 euros
- France: 136 euros
- Germany: 132 euros
- USA: 125 euros
- Saudi Arabia: 93 euros
Europe: Organic market shares

Europe: The countries with the highest organic shares of the total market 2017 and 2018

Source: FiBL-AMI survey 2020

Market share in %
Organic market shares of eggs

Source: FiBL-Erhebung 2020

Organic share of the value of eggs sold

- Denmark: 32.6%
- France: 29.6%
- Switzerland: 27.6%
- Austria: 22.3%
- Germany: 21.0%
- Finland: 18.0%
- Netherlands: 15.9%
- Belgium: 14.5%
- Norway: 8.7%
- UK: 6.9%
- Spain: 2.9%
The European Union (37.4 billion €) is the second largest single market after the US (40.6 billion €) and China. By region, North America has the lead (43 billion €), followed by Europe and Asia.

The European countries with the largest markets for organic food are Germany, France (9.1 billion €), Italy (3.5 billion €), and Switzerland (2.7 billion €).

Denmark and Switzerland have the highest per capita consumption worldwide, followed by Sweden, Luxembourg and Austria.

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

Summary

• In 2018 organic farming continued to grow and all time highs were reached for the organic farmland, producers, and market.

• However, the development varies a lot between countries.

• Other than in the past ten years, area growth is accelerating, however, particularly in Europe, production is still not keeping pace with the market development.

• For better monitoring of the development of the sector and to increase transparency, data collection and processing need to be improved in many countries, in particular for market and international trade data.
Organic Agriculture in Europe 2018

Organic Farmland 2018
- Top 3 countries (largest organic area):
  - France: 2.0 m ha
  - Italy: 2.0 m ha
  - Spain: 2.2 m ha

- Organic farmland in million hectares: 15.6 m ha
- Organic share of total farmland: 3.1%

Organic Producers & Processors 2018
- The number of organic producers is increasing from 2017:
  - Organic producers: 418'610 (+5.4%)
  - Organic processors: 75'569 (+5.9%)

Organic Market 2018
- The European market is growing:
  - European organic retail sales in billion euros: 40.7
  - Per capita spending: 50.5 €
  - Organic market growth: +7.8%

Organic retail sales: Top 3 countries (in billion euros)
- Germany: 10.9
- France: 9.1
- Italy: 3.5

Number of producers: Top 3 countries
- Turkey: 79'563
- Italy: 69'317
- France: 41'632

Organic market growth:
- France: 15.4%
- Denmark: 11.5%

Highest per capita spending is in Denmark and Switzerland: 312 €
Organic Agriculture in the European Union 2018

Organic Farmland 2018

Top 3 countries (largest organic area)

- Spain: 2.2 m ha
- Italy: 2.0 m ha
- France: 2.0 m ha

13.8 m ha
Organic farmland in million hectares

-7.6% From 2017

7.7%
Organic share of total farmland

Organic share of total farmland: Top 3 countries

- Austria: 24.7%
- Estonia: 21.6%
- Sweden: 19.9%

Organic Producers & Processors 2018

The number of organic producers is increasing

- Organic producers: 327'222 (+7.2% from 2017)
- Organic processors: 71'960 (+5.6% from 2017)

Organic Market 2018

The European market is growing

- EU organic retail sales in billion euros: 37.4
- Per capita spending: 76 €
- Organic market growth: +7.7%

Organic retail sales: Top 3 countries (in billion euros)

- Germany: 10.9
- France: 9.1
- Italy: 3.5

15.4%
Organic market growth

11.5%
Market share

312 €
Highest per capita spending is in Denmark

Source: FiBL survey based on national sources
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More information: www.organicworld.net - statistics.fibl.org
The World of Organic Agriculture 2018

Organic Farmland 2018
- North America: 3.3 m ha
- Europe: 15.6 m ha
- Asia: 6.5 m ha
- Africa: 2.0 m ha
- Latin America: 8.0 m ha
- Oceania: 36.0 m ha

Organic Producers 2018
- The number of organic producers is increasing
- 2.8 million Organic farmers
- +55% From 2009

Organic Market 2018
- The global market is growing and consumer demand is increasing
- Almost 97
- Global organic food market in billion euros

Top 3 countries (market in billion euros)
- USA: 40.6
- Germany: 10.9
- France: 9.1

Top 3 countries (land in million of hectares)
- Australia: 35.6
- India: 3.6
- China: 3.1

Number of producers: Top 3 countries
- Ethiopia: 203'602
- Uganda: 210'352
- Denmark & Switzerland: 1'149'371

15.4% Organic market growth
11.5% Market share
312 € Highest per capita spending is in Denmark and Switzerland

Source: FiBL survey based on national sources
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Half of Europe's organic farmland is in 4 countries.

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

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

In 2018 over 1.25 million hectares more were reported compared with 2017.

Growth of the organic agricultural land 1985–2018

Resources

• «The World of Organic Agriculture» at www.organic-world.net
• Slides and infographics at www.organic-world.net
• Twitter.com/fiblstatistics
• Interactive maps at www.organic-world.net
• Interactive data tables at statistics.fibl.org
• Interactive map at www.ifoam-eu.org
Statistics Sessions at BIOFACH 2020

At BIOFACH 2020, which will take place at the Messezentrum Nürnberg, Nuremberg, from February 12 to 15, several statistics-related sessions will take place. These are listed below.

The yearbook "The World of Organic Agriculture 2020" will be launched on February 12 at 5 pm.

- Feb 12, 2020, 3 to 4 pm, Location: Hall Shanghai, NCC Ost
  The German Organic Market, (with simultaneous translation)

- Feb 12, 2020, 4 to 5 pm, Location: Hall Shanghai, NCC Ost
  The European Market on Organic Food, (with simultaneous translation)

- Feb 12, 2020, 5 to 6 pm, Location: Hall Shanghai, NCC Ost
  The World of Organic Agriculture (with simultaneous translation)

- Feb 13, 2020, 10 to 11:30 am, Location: Hall St. Petersburg, NCC Ost
  Global Organic Market Overview

- Feb 13, 2020, 5 to 6 pm, Location: Hall Ost, NCC Ost
  Harmonisation of organic consumer data

The World of Organic Agriculture 2020

Key data - Table of contents - Press releases - Order book - Infographics - Presentations - Data tables - PDF version - BIOFACH 2020 - Corrigenda

BIOFACH 2020

Statistics sessions at BIOFACH 2020
# Europe and the European Union: Key indicators 2018

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Europe</th>
<th>European Union</th>
<th>Top 3 countries Europe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic farmland in hectares</td>
<td>15.6 million ha</td>
<td>13.8 million ha</td>
<td>Spain (2.2 million ha), France (2.0 million ha), Italy (2.0 million ha)</td>
</tr>
<tr>
<td>Organic share of total farmland</td>
<td>3.1 %</td>
<td>7.7 %</td>
<td>Liechtenstein (38.5%), Austria (24.7%), Estonia (21.6%)</td>
</tr>
<tr>
<td>Increase in organic farmland 2017-2018 in hectares</td>
<td>1.25 million ha</td>
<td>1 million ha</td>
<td>France (+290'604 ha), Spain (+164'302 ha), Germany (+148'137 ha)</td>
</tr>
<tr>
<td>Relative increase in organic farmland 2017-2018</td>
<td>8.7%</td>
<td>7.6%</td>
<td>Montenegro (+64%), Ireland (+60%), North Macedonia (+52%)</td>
</tr>
<tr>
<td>Land use [in million hectares]</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arable crops: 7.5</td>
<td>Arable crops: 6.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Permanent crops: 1.7</td>
<td>Permanent crops: 1.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Permanent pastures: 6.2</td>
<td>Permanent pastures: 6.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Top arable crop groups</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cereals: 2.6 million ha</td>
<td>Green fodder: 2.3 million ha</td>
<td>Largest arable areas: Spain (0.6 million ha), Italy (0.9 million ha), Germany (0.6 million ha)</td>
<td></td>
</tr>
<tr>
<td>Green fodder: 2.5 million ha</td>
<td>Cereals: 2.2 million ha</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dry pulses: 0.5 million ha</td>
<td>Dry pulses: 0.4 million ha</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Top permanent crop groups</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Olives: 0.6 million ha</td>
<td>Olives: 0.5 million ha</td>
<td>Largest permanent crop areas: Spain (0.6 million ha), Italy (0.5 million ha), Turkey (0.2 million ha)</td>
<td></td>
</tr>
<tr>
<td>Grapes: 0.4 million ha</td>
<td>Grapes: 0.3 million ha</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nuts: 0.3 million ha</td>
<td>Nuts: 0.3 million ha</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wild collection area</td>
<td>17.2 million ha</td>
<td>13.9 million ha</td>
<td>Finland (11.2 million ha), Romania (1.8 million ha; 2014), Albania (0.6 million ha)</td>
</tr>
<tr>
<td>Producers [no.]</td>
<td>418'610</td>
<td>327'222</td>
<td>Turkey: (79'563), Italy (69'317), France (41'632)</td>
</tr>
<tr>
<td>Processors [no.]</td>
<td>75'569</td>
<td>71'960</td>
<td>Italy (20'087), France (16'651), Germany (15'441)</td>
</tr>
<tr>
<td>Importers [no.]</td>
<td>5'790</td>
<td>5'034</td>
<td>Germany (1'723), Switzerland (548), France (545)</td>
</tr>
<tr>
<td>Retail sales</td>
<td>40.7 billion euros</td>
<td>37.4 billion euros</td>
<td>Germany (10'910 million euros), France (9'139 million euros), Italy (3'483 million euros)</td>
</tr>
<tr>
<td>Growth of retail sales 2017-2018</td>
<td>7.8%</td>
<td>7.7%</td>
<td>France (15.4%), Switzerland (13.3%), Denmark (12.9%)</td>
</tr>
<tr>
<td>Organic share of total market</td>
<td>No data</td>
<td>No data</td>
<td>Denmark (11.5%), Switzerland (9.9%), Sweden (9.6%)</td>
</tr>
<tr>
<td>Per capita consumption [euros]</td>
<td>50 euros</td>
<td>76 euros</td>
<td>Switzerland (312 euros), Denmark (312 euros), Sweden (231 euros)</td>
</tr>
</tbody>
</table>

For detailed data sources see annex.