



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

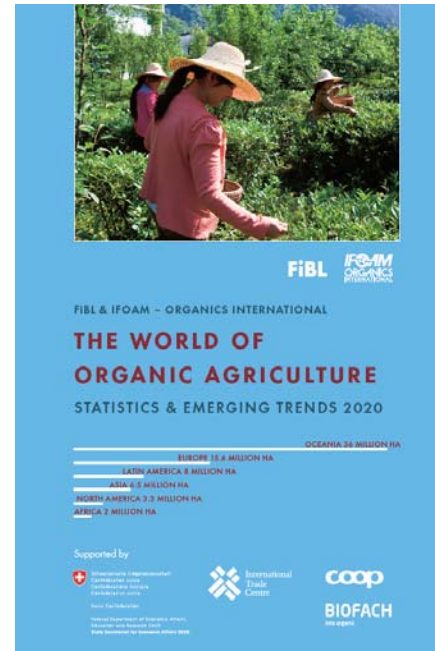
- The 21st edition of 'The World of Organic Agriculture', was published by FiBL and IFOAM – Organics International in February 2020.
- Data tables
- Country and continent reports
- Markets, standards, policy support
- Chapters on ICS, PGS, Demeter, EU imports

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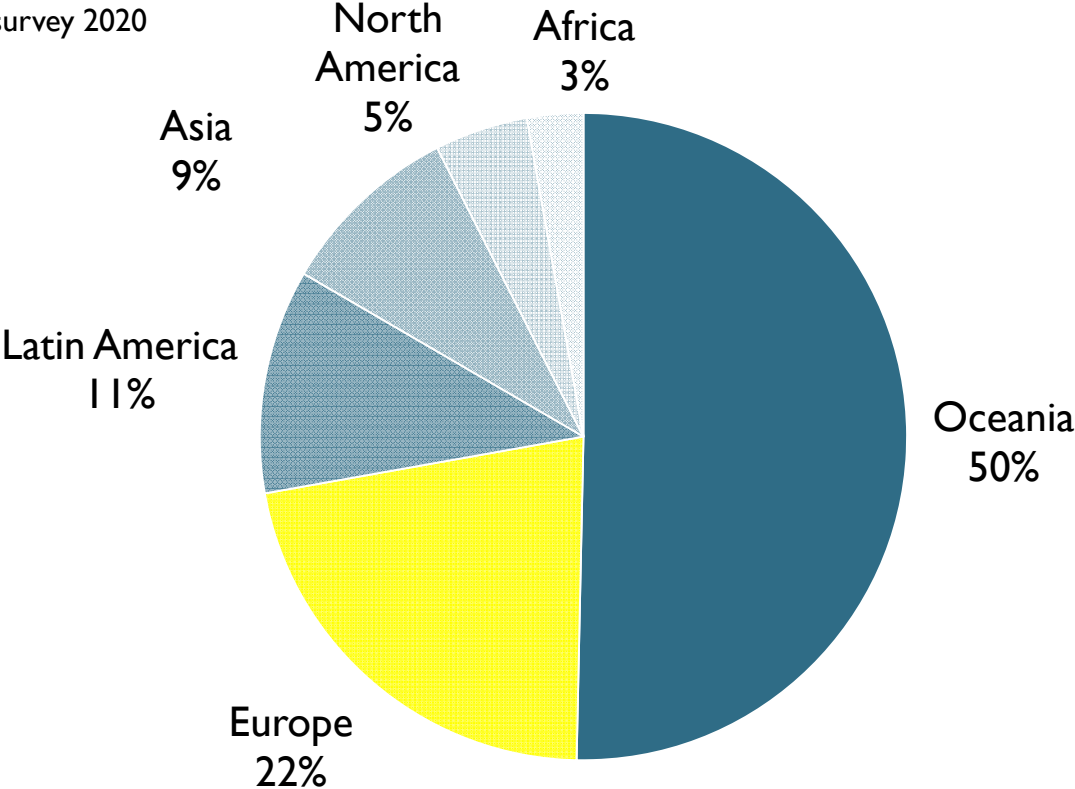
Another record year for organic in Europe and worldwide - highlights 2018

- › 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

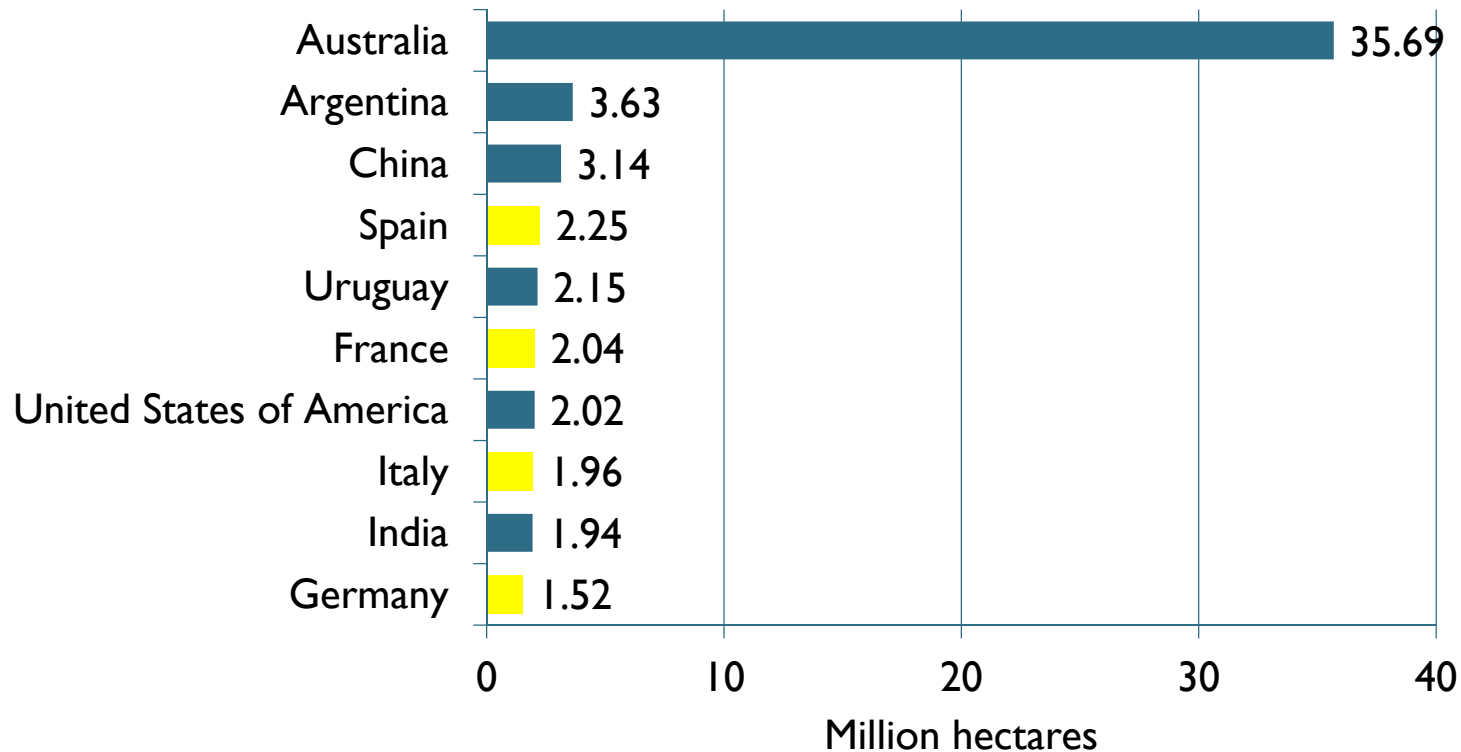
Source: FiBL survey 2020



The ten countries with the most organic agricultural land 2018

The ten countries with the largest areas of organic agricultural land 2018

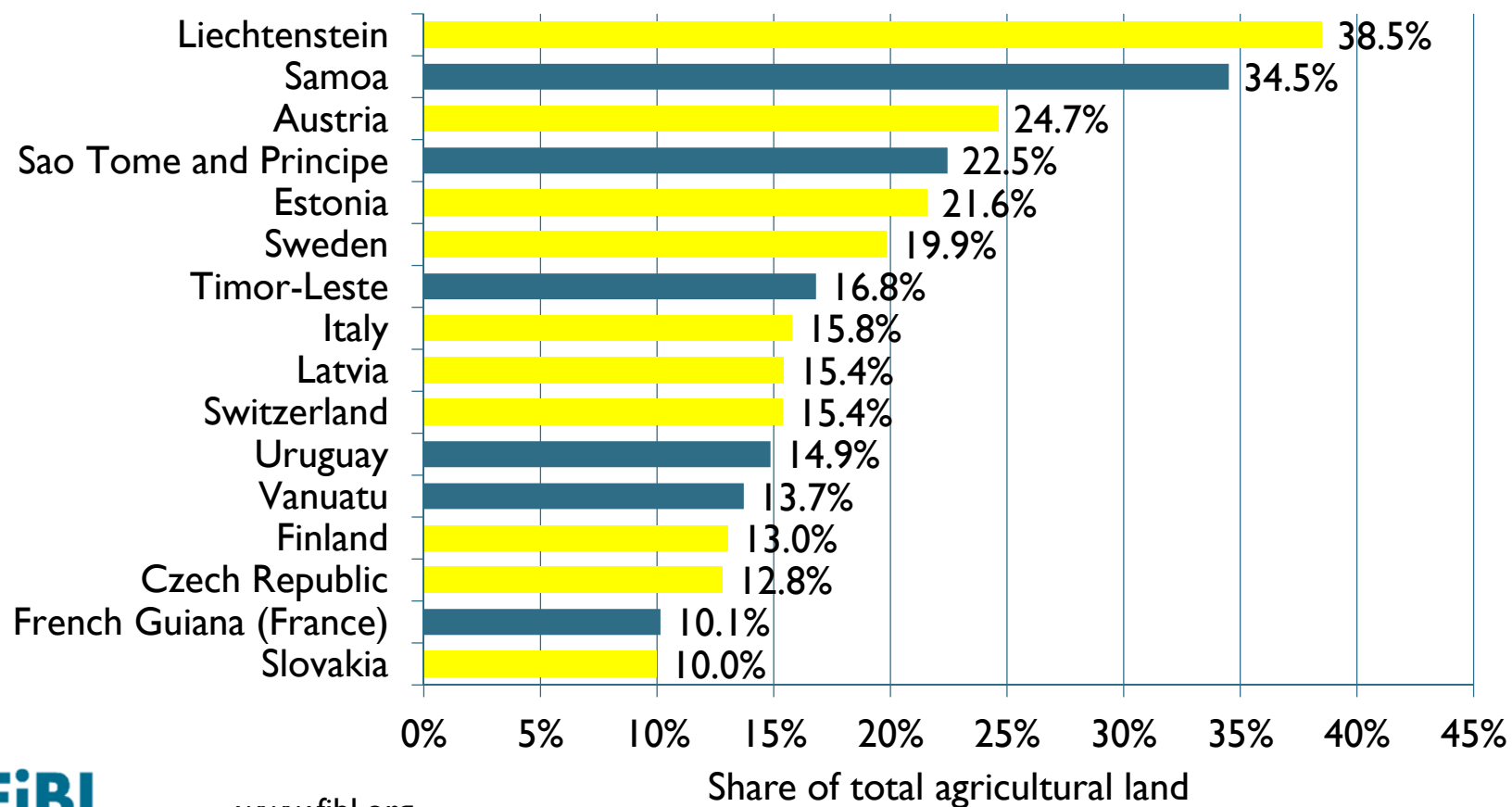
Source: FiBL survey 2020



The countries with the highest shares of organic agricultural land 2018

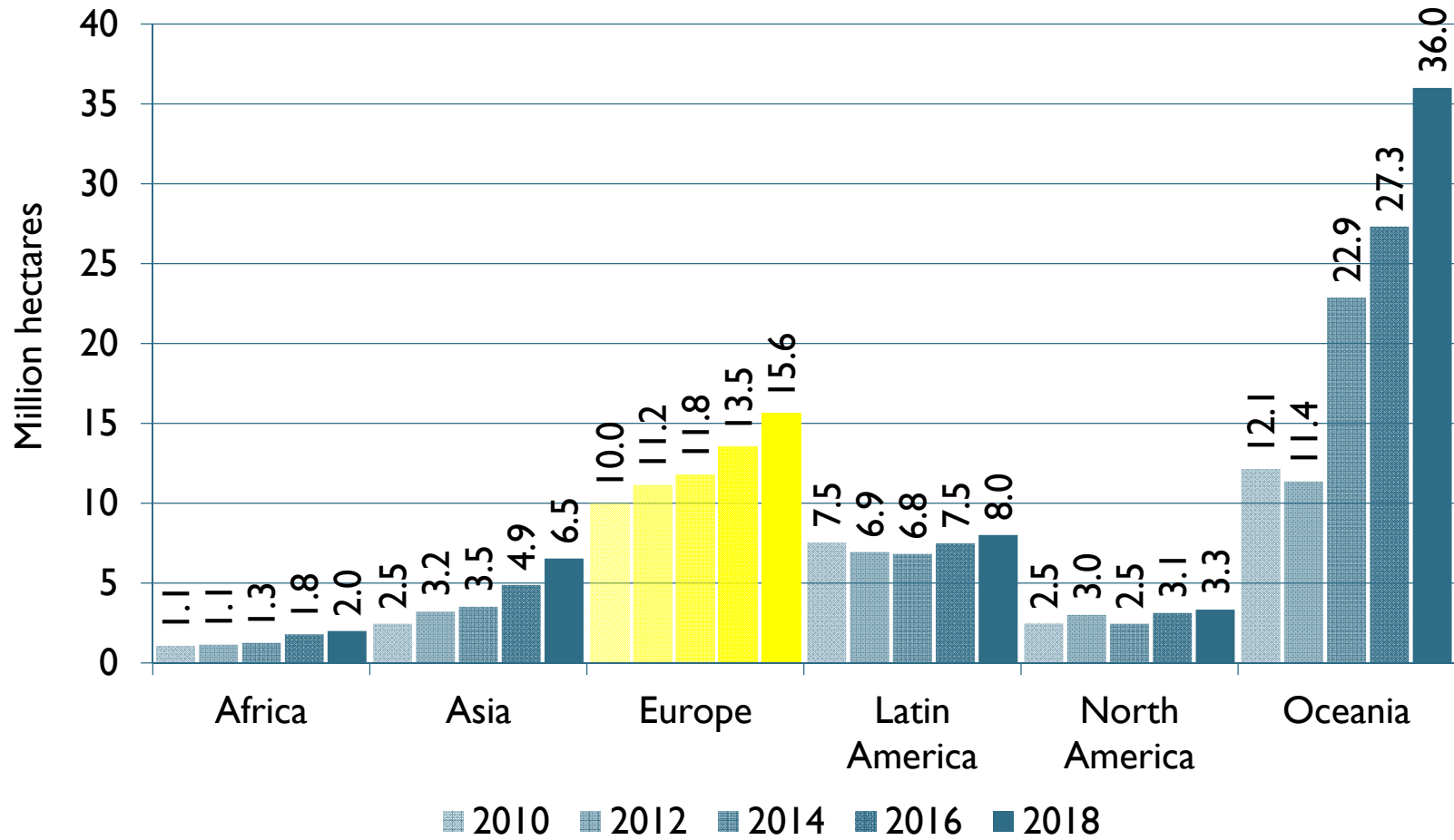
Countries with an organic share of at least 10 percent of the agricultural land 2018

Source: FiBL survey 2020



Growth of the organic agricultural land by continent 2010-2018

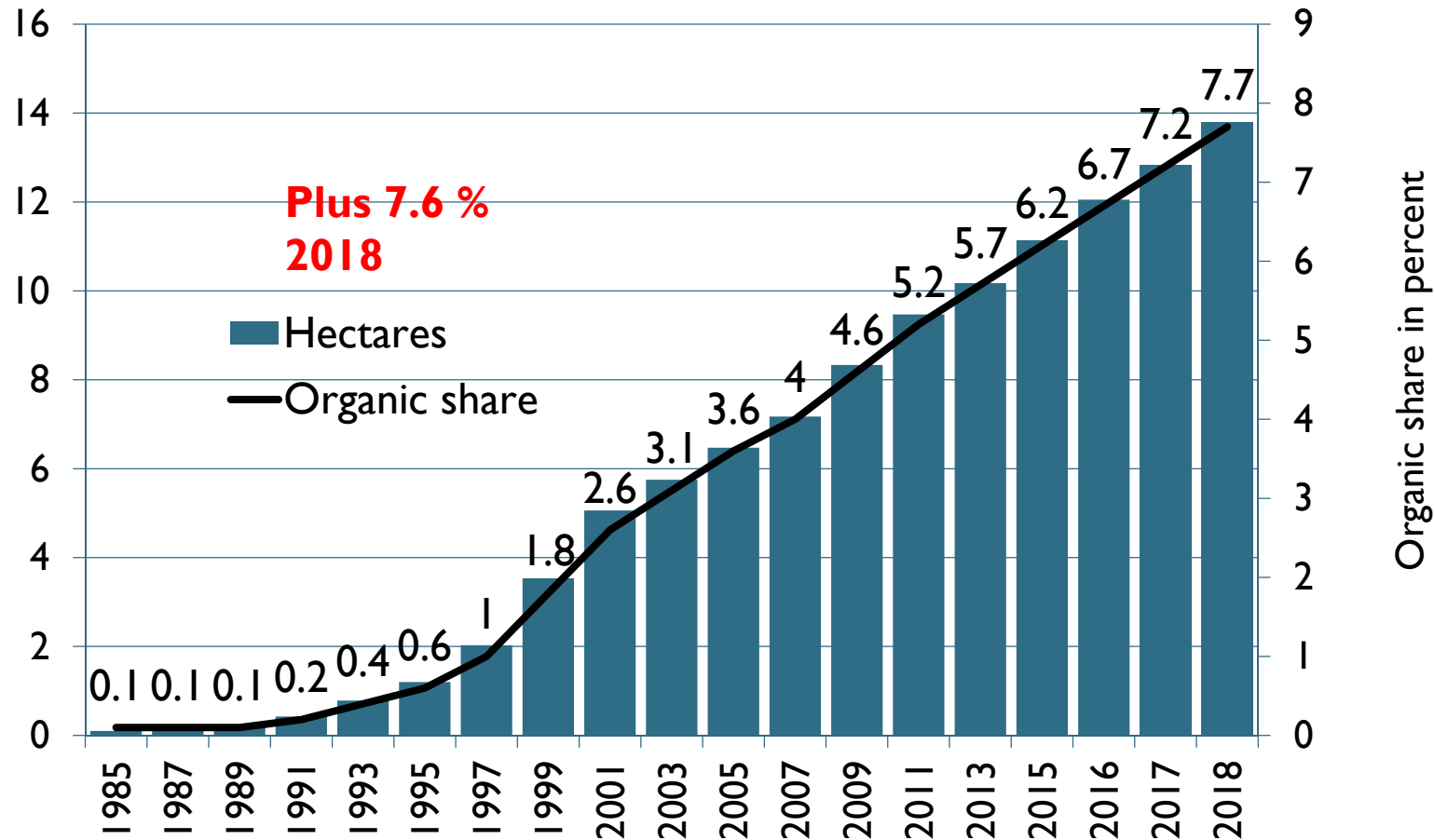
Source: FiBL-IFOAM survey 2012-2020



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



Europe and European Union: Development of retail sales 2000-2018

Europe and European Union: Development of retail sales 2000-2018

Source: FiBL-AMI Surveys 2006-2020, OrganicDataNetwork Surveys 2013-2015

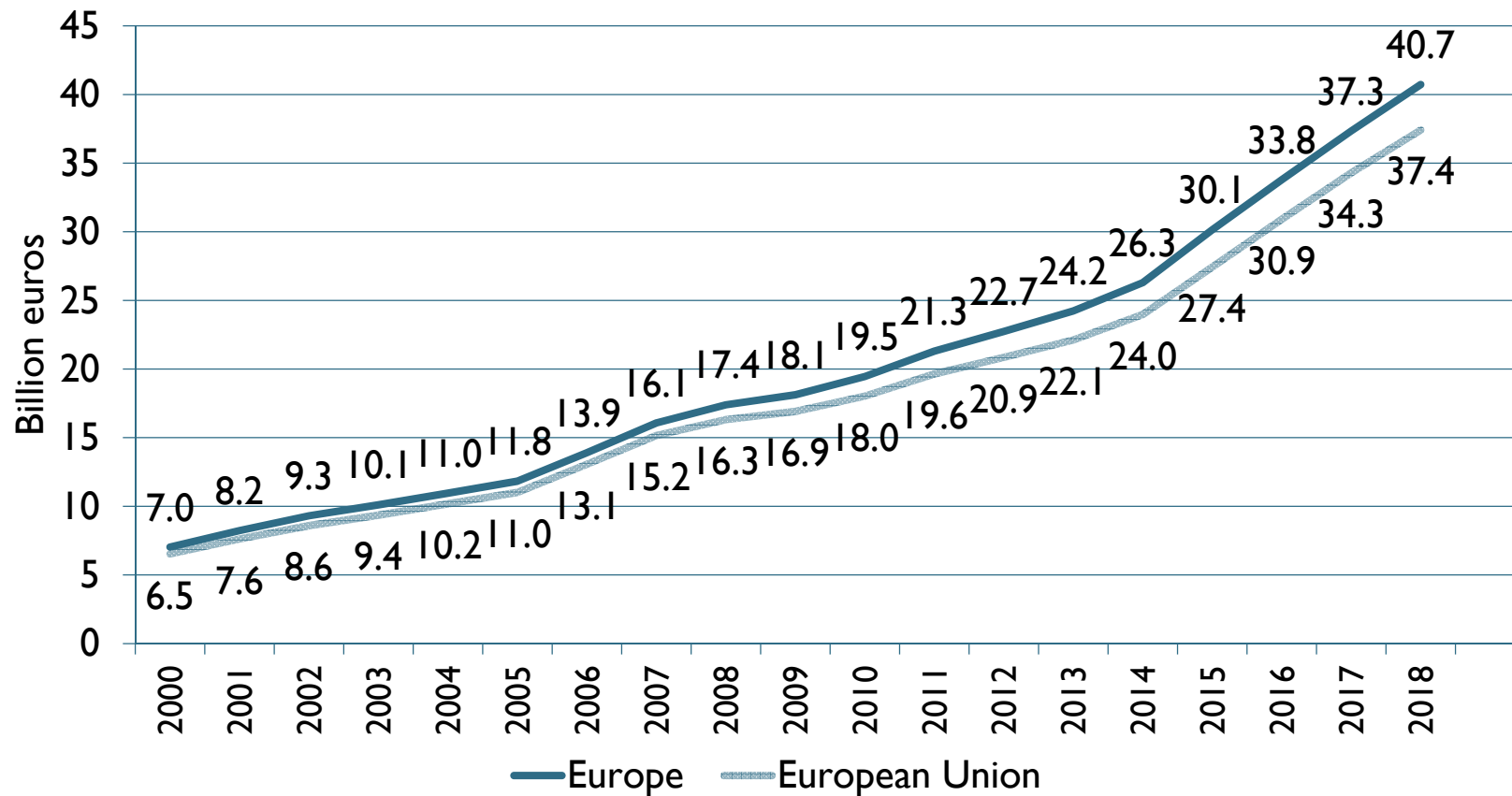
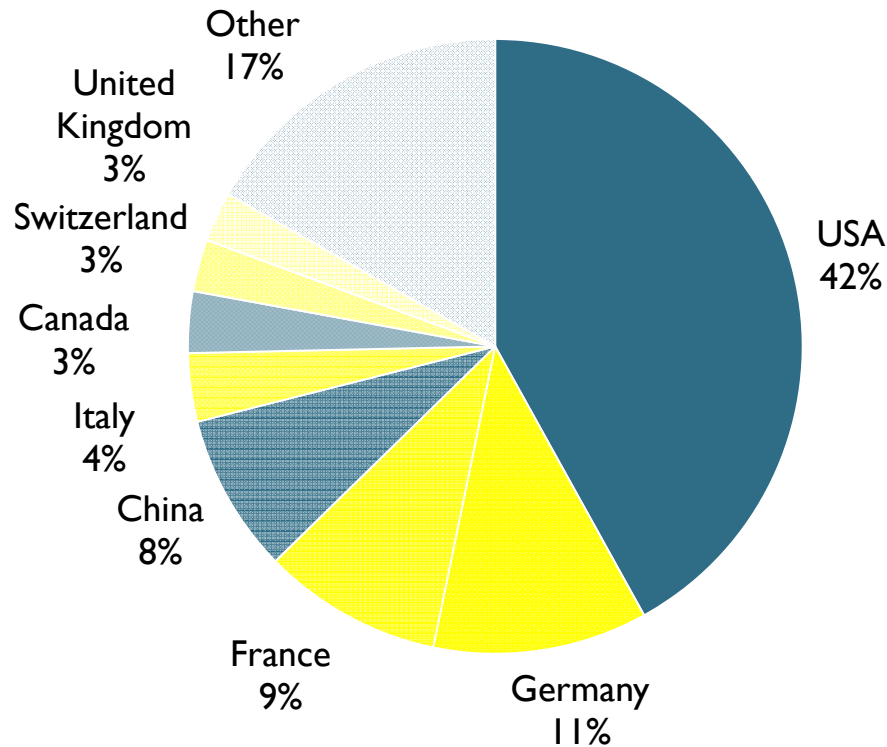


Figure: Distribution of retail sales in Europe and worldwide

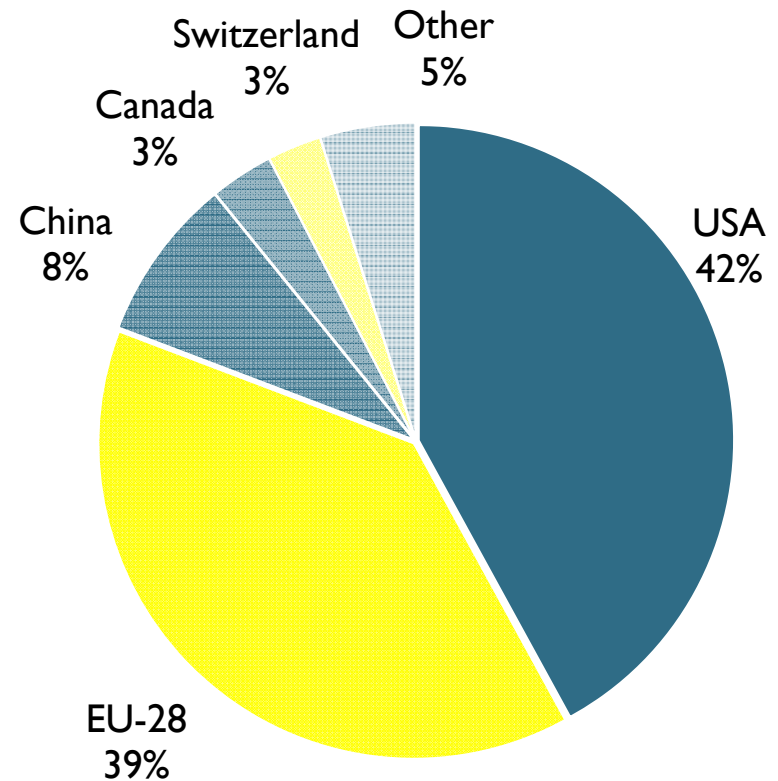
Global market: Distribution of retail sales value by country 2018

Source: FiBL-AMI survey 2020, based on retail sales with organic food



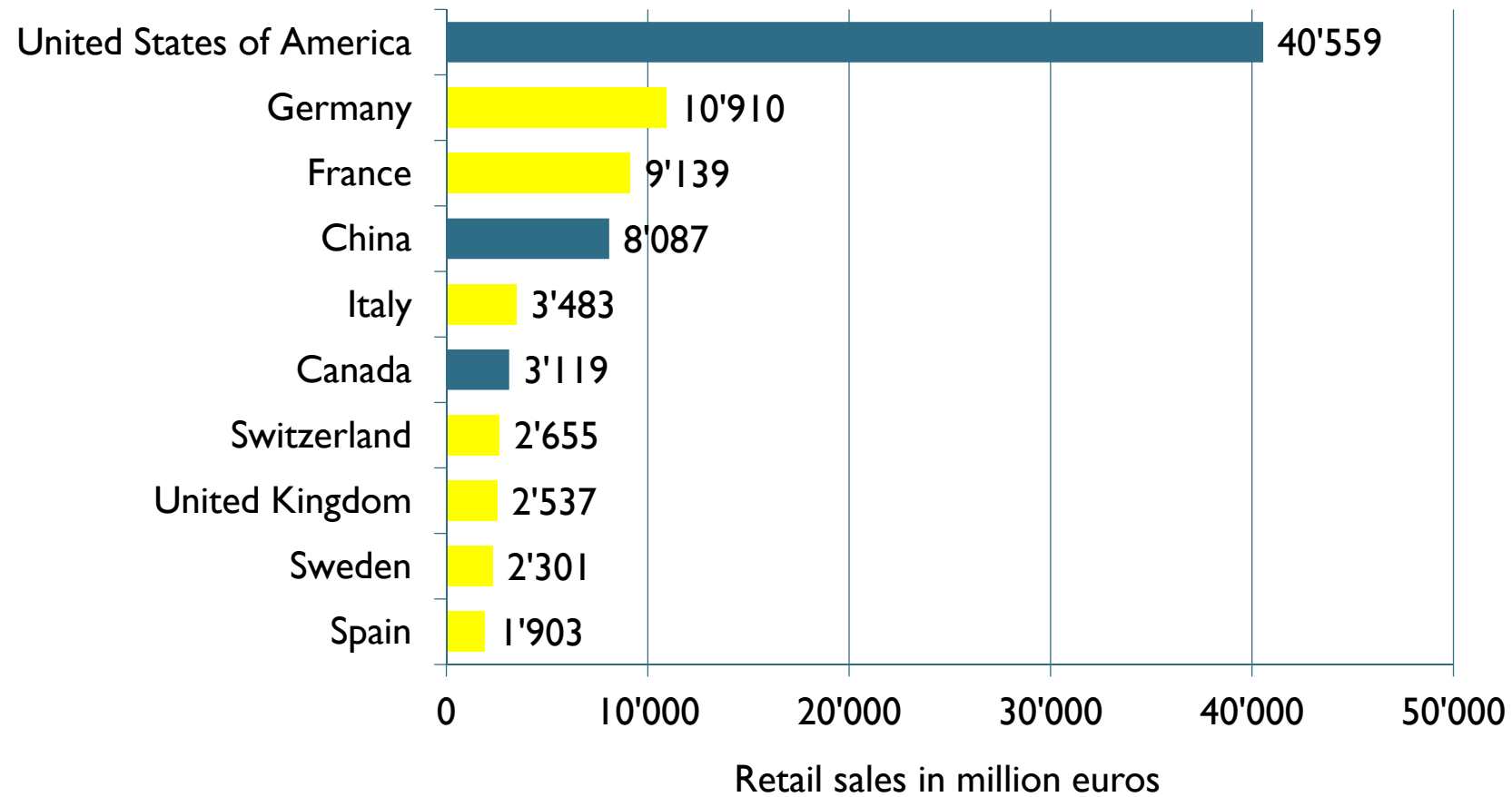
World: distribution of retail sales by single market 2018

Source: FiBL-AMI survey 2020



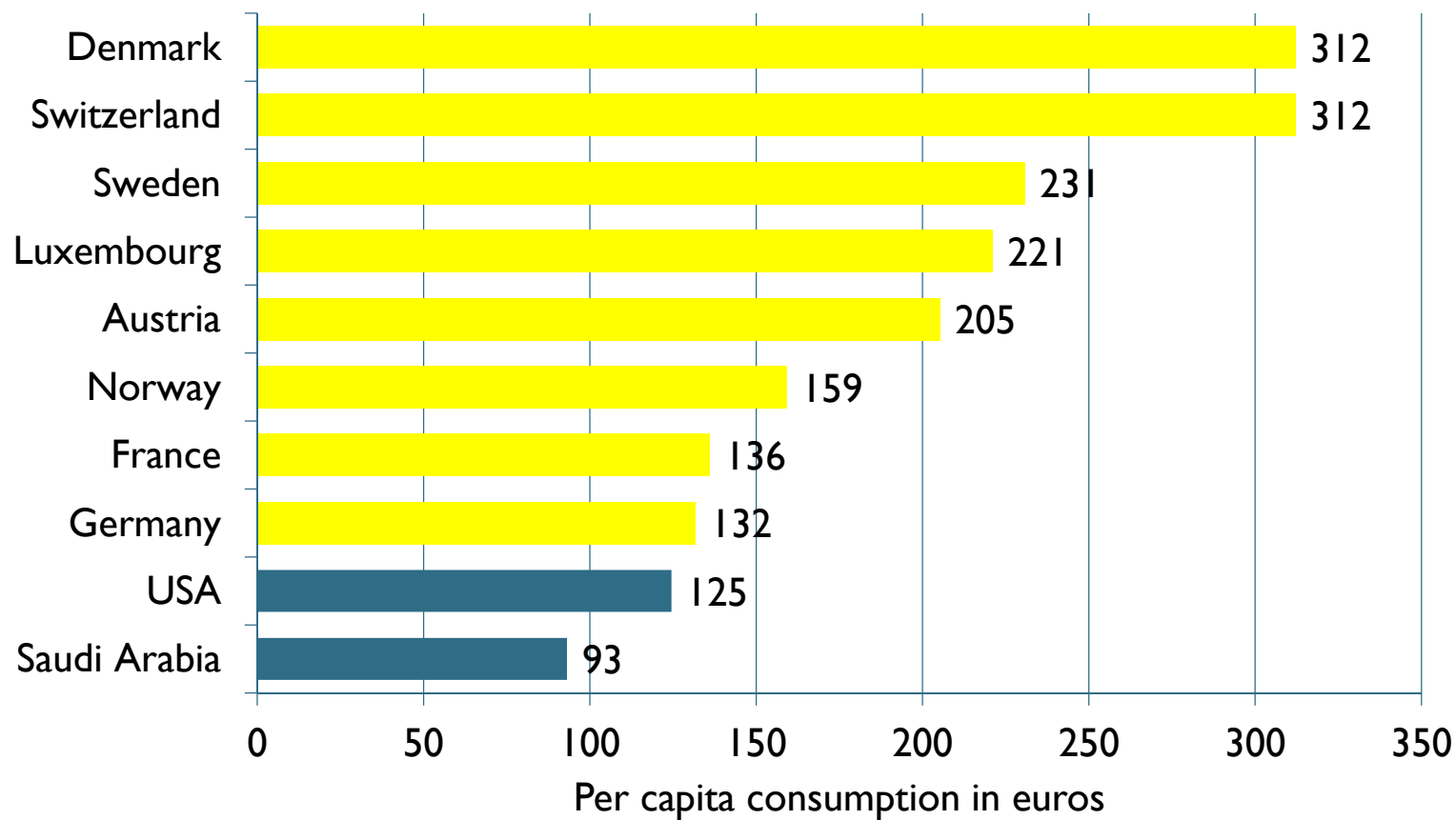
The ten countries with the largest markets for organic food 2018

Source: FiBL-AMI survey 2020



The ten countries with the highest per capita consumption 2018

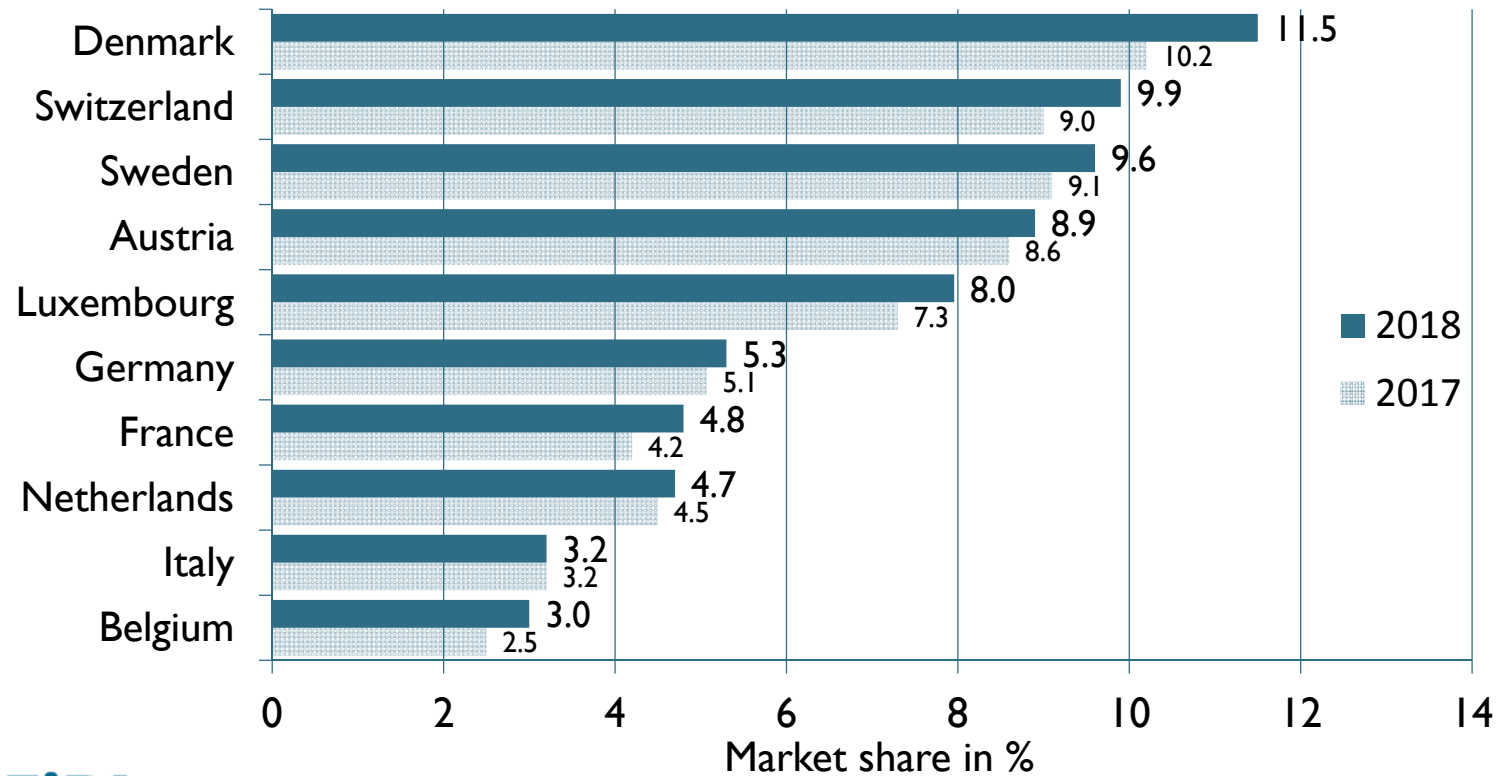
Source: FiBL-AMI survey 2020



Europe: Organic market shares

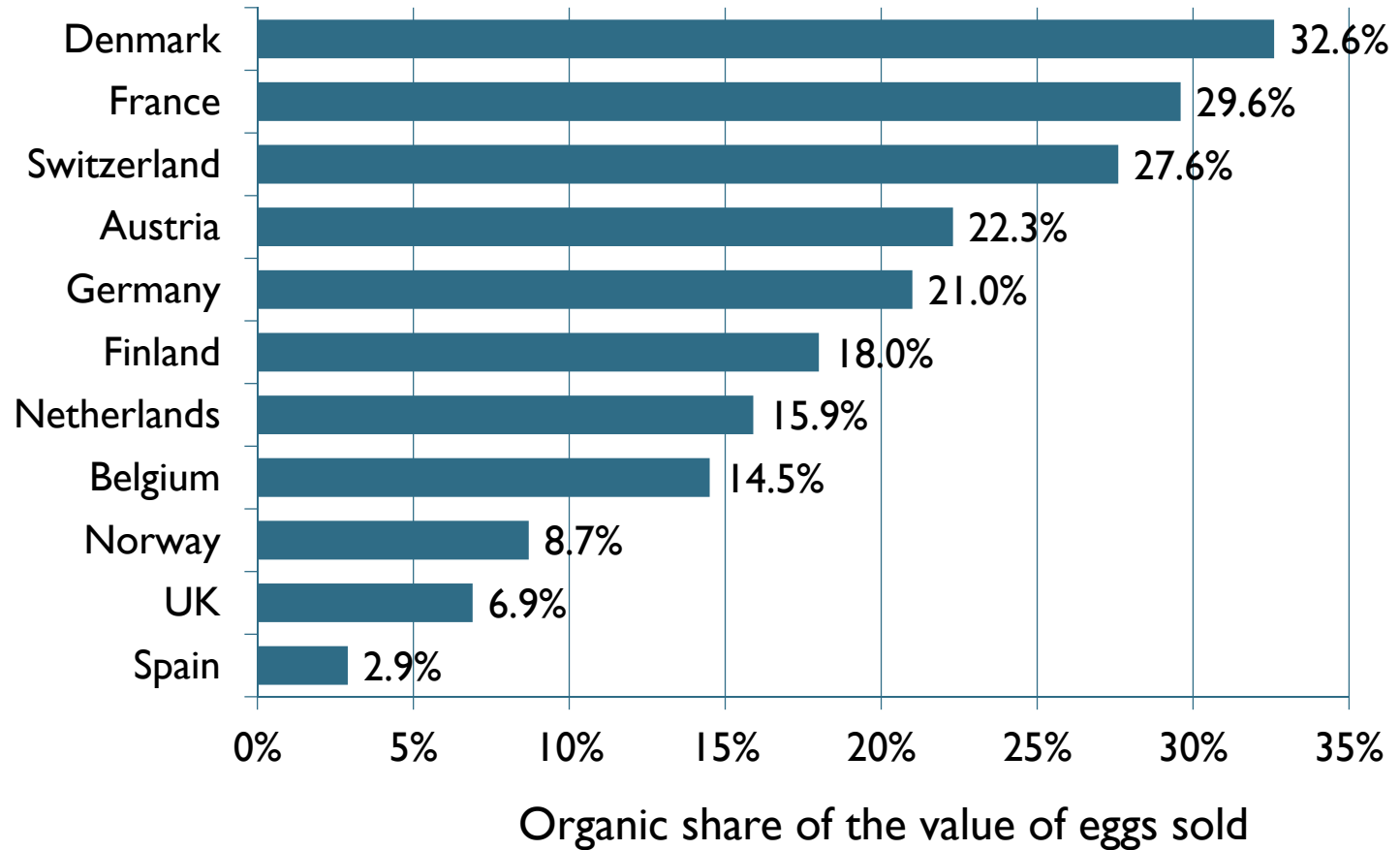
Europe: The countries with the highest organic shares of the total market 2017 and 2018

Source: FiBL-AMI survey 2020



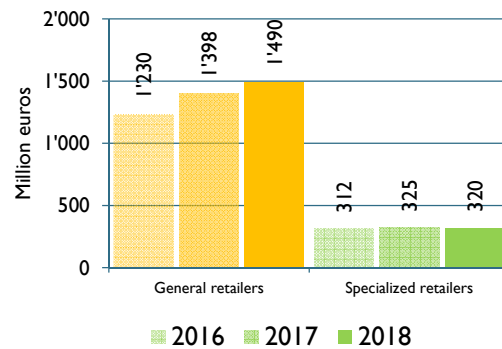
Organic market shares of eggs

Source: FiBL-Erhebung 2020

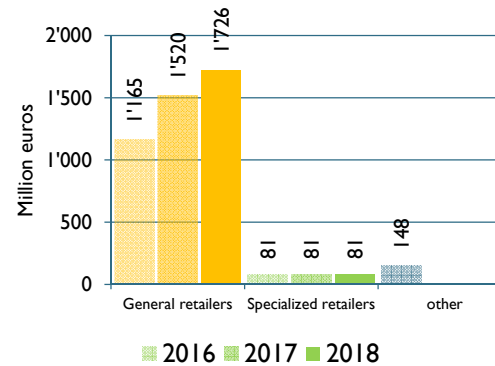


Organic marketing channels (AT, CH, DE, DK, FR, IT)

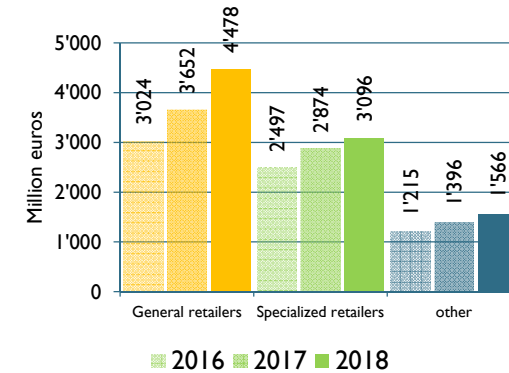
Austria



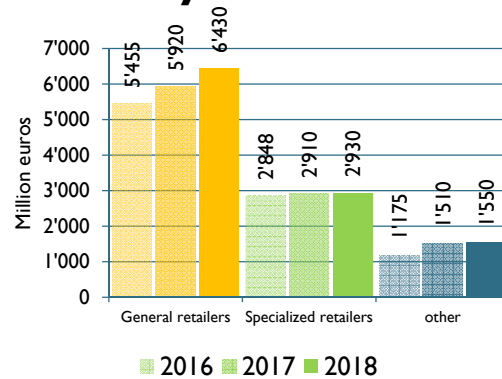
Denmark



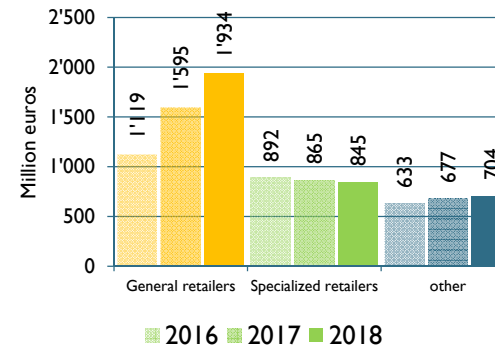
France



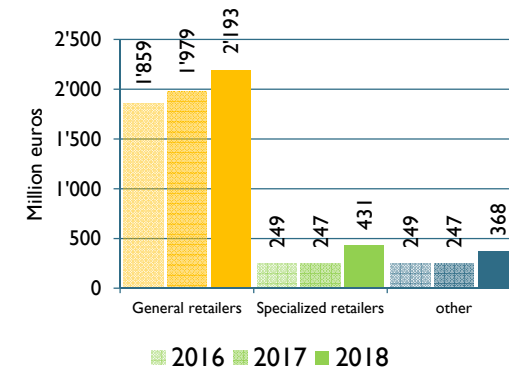
Germany



Italy



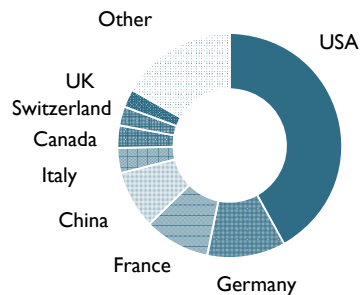
Switzerland



EUROPE: ORGANIC RETAIL SALES 2018



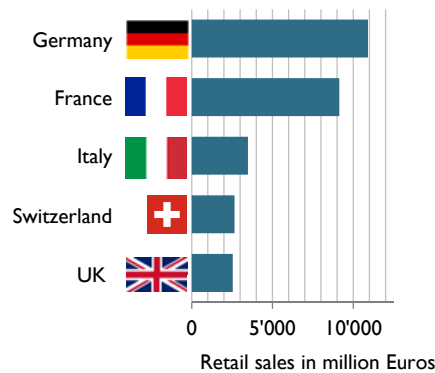
The European Union (37.4 billion €) is the second largest single market after the US (40.6 billion €) and China. By region, North America has the lead (43 billion €), followed by Europe and Asia.



Distribution of retail sales value worldwide by Country 2018



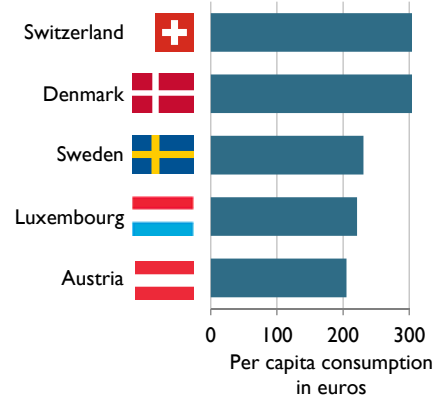
The European countries with the largest markets for organic food are Germany, France (9.1 billion €), Italy (3.5 billion €), and Switzerland (2.7 billion €).



The countries with the largest markets for organic food 2018



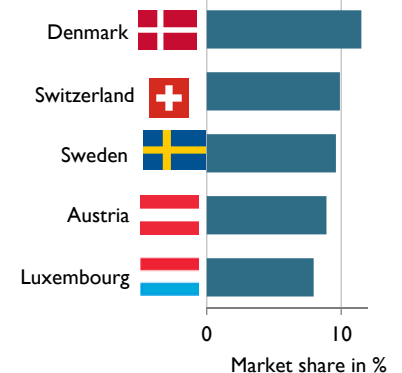
Denmark and Switzerland have the highest per capita consumption worldwide, followed by Sweden, Luxembourg and Austria.



The countries with the highest per capita consumption of organic food 2018



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



The countries with the highest organic shares of the total market 2018

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)

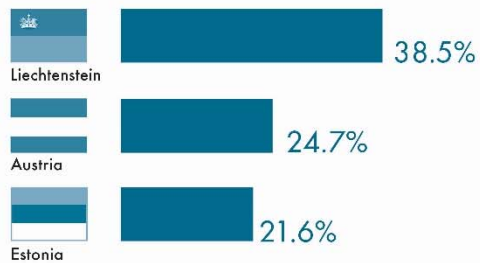


15.6 m ha Organic farmland in million hectares

+8.7% From 2017

3.1% Organic share of total farmland

Organic share of total farmland: Top 3 countries



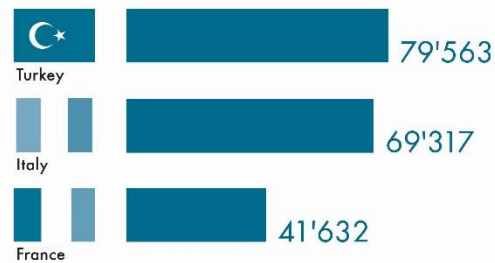
Organic Producers & Processors 2018

The number of organic producers is increasing

418'610 Organic producers **+5.4%** From 2017

75'569 Organic processors **+5.9%** From 2017

Number of producers: Top 3 countries



Organic Market 2018

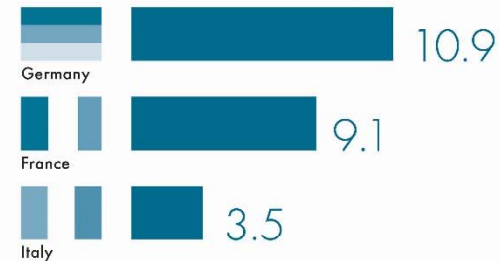
The European market is growing

40.7 European organic retail sales in billion euros

50.5 € Per capita spending

+7.8% Organic market growth

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



15.4% Organic market growth

11.5% Market share

312 € Highest per capita spending is in Denmark and Switzerland

Organic Agriculture in the European Union 2018

Organic Farmland 2018

Top 3 countries (largest organic area)

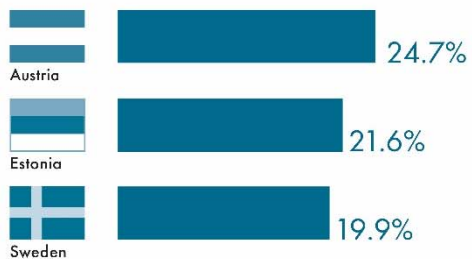


13.8 m ha Organic farmland in million hectares

+7.6% From 2017

7.7% Organic share of total farmland

Organic share of total farmland: Top 3 countries



Organic Producers & Processors 2018

The number of organic producers is increasing

327'222

Organic producers

+7.2%

From 2017

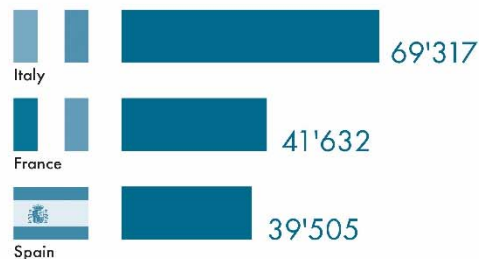
71'960

Organic processors

+5.6%

From 2017

Number of producers: Top 3 countries



Organic Market 2018

The European market is growing

37.4

EU organic retail sales in billion euros

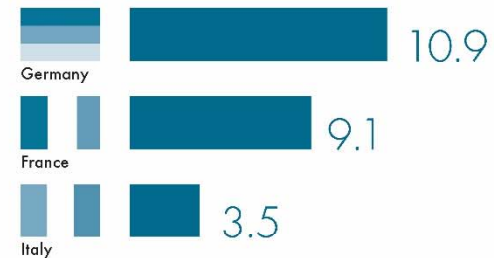
76 €

Per capita spending

+7.7%

Organic market growth

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



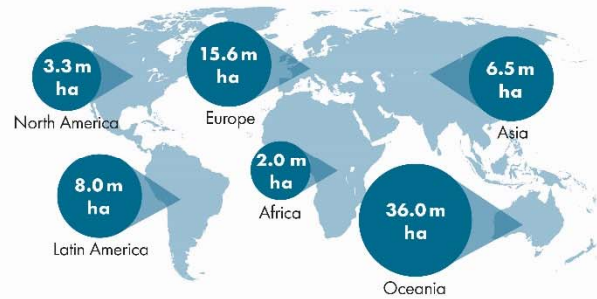
15.4% Organic market growth

11.5% Market share

312 € Highest per capita spending is in Denmark

The World of Organic Agriculture 2018

Organic Farmland 2018

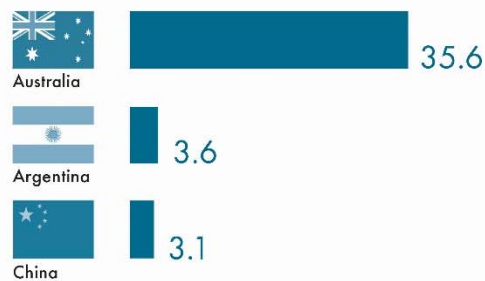


71.5 m ha Organic farmland in million hectares

+2.9% From 2017

186 Countries with organic farming

Top 3 countries (land in million of hectares)



Organic Producers 2018

The number of organic producers is increasing

2.8 million Organic farmers

+55% From 2009

Number of producers: Top 3 countries



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)



15.4% Organic market growth

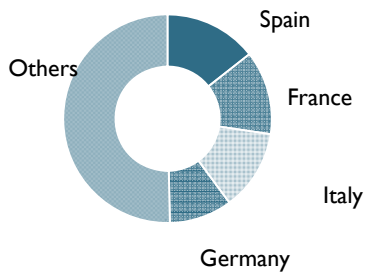
11.5% Market share

312 € Highest per capita spending is in Denmark and Switzerland

EUROPE: ORGANIC FARMLAND 2018



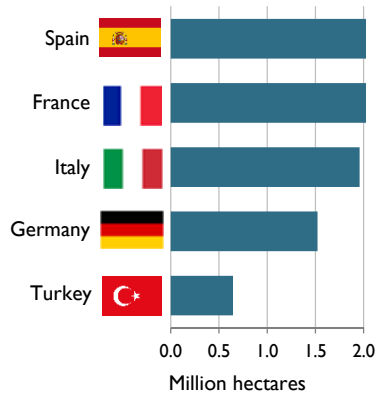
Half of Europe's organic farmland is in 4 countries.



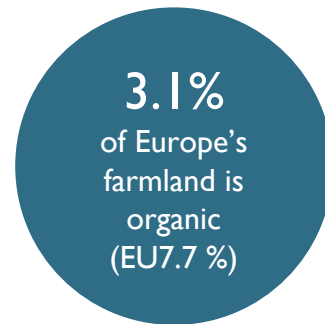
Distribution of organic agricultural land by country 2018



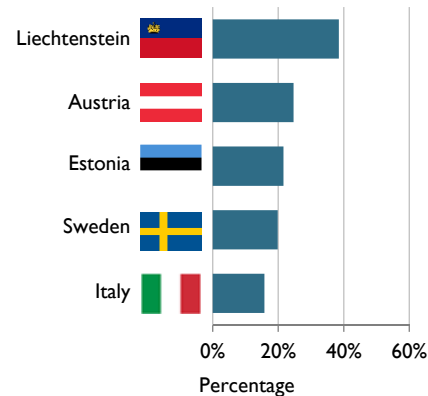
The country with the largest area of organic farmland is in Spain, followed by France and Italy.



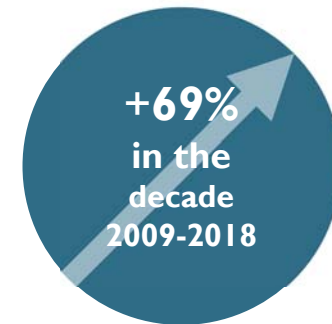
Top 5 countries with the largest areas of organic agricultural land 2018



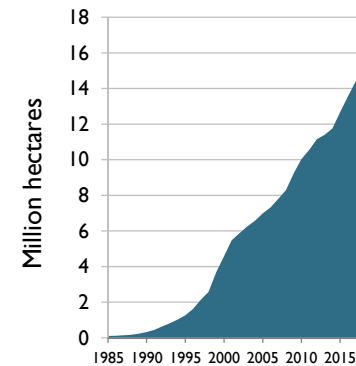
Ten countries have 10% or more of their agricultural land under organic management.



Top 5 countries, where more than 10 percent of the farmland is organic 2018



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](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**

Presentations at www.organic-world.net

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- Yearbook**
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Home » Yearbook » 2020 edition » BIOFACH 2020

- ▶ **2020 edition**
 - Table of contents
 - BIOFACH 2020**
- ▶ 2019 edition
- ▶ 2018 edition
- ▶ 2017 edition
- ▶ 2016 edition
- ▶ 2015 edition
- ▶ 2014 edition
- ▶ 2013 edition
- ▶ 2012 edition
- ▶ 2011 edition
- ▶ 2010 edition
- ▶ 2009 edition
- ▶ 2008 edition
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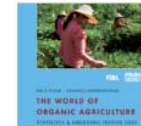
Statistics Sessions at BIOFACH 2020

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 Oslo, NCC Ost
 - Harmonisation of organic consumer data**

The World of Organic Agriculture 2020



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Europe and the European Union: Key indicators 2018

Indicator	Europe	European Union	Top 3 countries Europe
Organic farmland in hectares	15.6 million ha	13.8 million ha	Spain (2.2 million ha) France (2.0 million ha) Italy (2.0 million ha)
Organic share of total farmland	3.1 %	7.7 %	Liechtenstein (38.5%) Austria (24.7%) Estonia (21.6%)
Increase in organic farmland 2017-2018 in hectares	1.25 million ha	1 million ha	France (+290'604 ha) Spain (+164'302 ha) Germany (+148'157 ha)
Relative increase in organic farmland 2017-2018	8.7%	7.6%	Montenegro (+64%) Ireland (+60%) North Macedonia (+52%)
Land use [in million hectares]	Arable crops: 7.5 Permanent crops: 1.7 Permanent pastures: 6.2	Arable crops: 6.1 Permanent crops: 1.5 Permanent pastures: 6.0	
Top arable crop groups	Cereals: 2.6 million ha Green fodder: 2.5 million ha Dry pulses: 0.5 million ha	Green fodder: 2.3 million ha Cereals: 2.2 million ha Dry pulses: 0.4 million ha	Largest arable areas: France (1.1 million ha) Italy (0.9 million ha) Germany (0.6 million ha)
Top permanent crop groups	Olives: 0.6 million ha Grapes: 0.4 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 (0.6 million ha) Italy (0.5 million ha) Turkey (0.2 million ha)
Wild collection area	17.2 million ha	13.9 million ha	Finland (11.2 million ha) Romania (1.8 million ha; 2014) Albania (0.6 million ha)
Producers [no.]	418'610	327'222	Turkey: (79'563) Italy (69'317) France (41'632)
Processors [no.]	75'569	71'960	Italy (20'087) France (16'651) Germany (15'441)
Importers [no.]	5'790	5'034	Germany (1'723) Switzerland (548) France (545)
Retail sales	40.7 billion euros	37.4 billion euros	Germany (10'910 million euros) France (9'139 million euros) Italy (3'483 million euros)
Growth of retail sales 2017-2018	7.8%	7.7%	France (15.4%) Switzerland (13.3%) Denmark (12.9%)
Organic share of total market	No data	No data	Denmark (11.5 %) Switzerland (9.9 %) Sweden (9.6 %)
Per capita consumption [euros]	50 euros	76 euros	Switzerland (312 euros); Denmark (312 euros) Sweden (231 euros)

Source: FiBL-AMI survey 2020.

For detailed data sources see annex