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 (15'019149.65) 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.

Organic Farming and Market Development in Europe and the European Union[1]

HELGA WILLER,[2] DIANA SCHAACK,[3] AND JULIA LERNOUD[4]

In this article we focus on organic farming and market statistics in Europe – the 28 Member States of the European Union,[5] the EU Candidate and Potential Candidate countries (CPC: Albania, Bosnia-Herzegovina, Kosovo, Macedonia FYROM, Montenegro, Serbia, Turkey), the members of the European Free Trade Association (EFTA: Iceland, Norway, Liechtenstein, Switzerland), as well as other European countries: Andorra, Belarus, Moldova, Russian Federation, San Marino and Ukraine.

In 2017, the development of the organic sector in Europe was characterized by two trends. On the one hand, the market showed a double-digit growth rate again (10.5 percent in Europe; 10.9 percent in the European Union). On the other hand, organic farmland growth continued to be slower than that of the market, but it was considerably faster than in the first years of the previous decade, increasing by 7.9 percent in Europe and 6.4 percent in the European Union. The trend of the market growing at a faster rate than the area (Figure 68) has been occurring for several years, showing that production is still not keeping pace with consumer demand. However, the total organic area is only one factor. When comparing the development of the organic area with that of the retail sales, it is more important to look at land use and crop patterns, the types of livestock husbandry, and, most of all, the production value. It is also important to note in this context that growth rates of more intensive production like fruit and vegetables, or milk production have increased significantly over the past years (Table 56, Figure 80).

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[1] For the 2019 edition of "The World of Organic Agriculture," we have also updated the article "Growth trends in European organic food and farming," published by IFOAM EU and the Research Institute of Organic Agriculture FiBL in "Organic in Europe, 2016" (Willer et al. 2016). Therefore, the structure of this chapter is different from the other regional statistics chapters in this book.

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[5] The 28 member states of the European Union consist of the EU-13 countries, which became members of the European Union in or after May 2004, and of the EU-15 countries, who were member countries of the European Union before the accession of ten candidate countries on May 1, 2004. In this report, we publish the 2017 data, which is why the United Kingdom is included in the European Union data.

1 Key facts and figures: Production and market highlights

Almost 15 million hectares of farmland were organic in Europe in 2017 – Spain had the largest area

In Europe, 14.6 million hectares were managed organically in 2017 (European Union: 12.8 million hectares). With more than 2 million hectares, Spain continued to be the country with the largest organic area in Europe (almost one-sixth of the European farmland), followed by Italy (1.9 million hectares), and France (1.7 million hectares).

European organic farmland increased by one million hectares

The organic land increased by one million hectares in Europe (with a major increase in farmland in the Russian Federation) and by 0.8 million hectares in the European Union, representing an increase of 7.6 percent in Europe and 6.4 percent in the European Union. Growth was a bit lower than in 2016 but higher than in the first years of the current decade. In the decade 2008-2017, the organic agricultural land increased by more than two thirds.

Liechtenstein is the country with the highest organic farmland share in the world – in ten countries more than ten percent of the farmland is organic

Organic farmland in Europe constitutes 2.9 percent of the total agricultural land and 7.2 percent in the European Union. In Europe (and globally), Liechtenstein has the highest organic share of all farmland (37.9 percent) followed by Austria, the country in the European Union with the highest organic share of agricultural land (24 percent). In Europe, ten countries have an organic area share of at least 10 percent. In eight countries in the European Union, more than ten percent of farmland is organic.

Organic producers and processors on the rise

There were almost than 400’000 organic producers in Europe (European Union: almost 310’000), with the largest numbers in Turkey (75’0670) and Italy (66’773). While in 2017 the number of producers grew by almost 7 percent in Europe (almost 4 percent in the European Union), growth was 79 percent in Europe and 55 percent in the European Union from 2008-2017.

There were more than 71’000 organic processors in Europe (+8.3 percent compared to 2016) and more than 68’000 in the European Union (+8.8 percent). The country with the largest number of processors was Italy (18’092).

Double-digit growth for importers

The number of importers grew faster than the number of producers and processors: More than 5’300 importers (+ 14.1 percent) were counted in Europe and almost 4’600 in the European Union (+15.5 percent). Germany had the most importers (1’692).

Retail sales heading towards the 40 billion euro mark

Organic retail sales in Europe were valued at 37.3 billion euros (34.3 billion euros in the European Union). The European Union represents the second largest single market for organic products in the world after the United States. With 10 billion euros of retail sales, Germany is the biggest market in Europe and the second biggest in the world.

Double-digit market growth

The European organic market recorded a growth rate of 10.5 percent (European Union: 10.9 percent), which is the third time retail sales have shown a double-digit growth rate since the financial crisis. Among the key markets, the highest growth was observed in France (18 percent). In the decade 2008-2017, the value of European and European Union organic markets almost doubled.

European consumers spend more on organic food

European consumers spent 47 euros on organic food per person in 2017 (European Union: 67 euros). Per capita consumer spending on organic food has doubled in the last decade. The Swiss spent the most money on organic food per capita (288 euros).

Highest organic market shares are in Europe

Globally, European countries account for the highest shares of organic food sales as a percentage of their respective food markets. Denmark has the highest organic market share globally (13.4 percent) and was the first country to pass the 10 percent mark.

2 Organic agricultural land: Area, organic shares, growth

Table 54: Europe: Organic agricultural land in Europe and the European Union 2017

	Organic area [million ha]	Organic share [%]	Change 2016-2017 [%]	Change 2016-2017 [million ha]	Change 2008-2017 [%]	Change 2008-2017 [million ha]
European Union	12.8	7.2%	6.4%	0.8	67%	5.1
Europe	14.6	2.9%	7.6%	1.0	76%	6.2

Source: FiBL-AMI survey based on Eurostat and national data sources. For country details, see Table 61.

2.1 Organic agricultural land

In 2017, 14.6 million hectares were farmed organically in Europe and almost 12.8 million hectares in the European Union (Table 54). Almost 90 percent of Europe's organic farmland was in the European Union. The countries with the largest areas of organic land were Spain (one-sixth of Europe's organic farmland), Italy, France, Germany, and, as a newcomer, the Russian Federation. Slightly more than half of Europe's organic farmland was in these countries (Figure 69). A bit more than one-fifth of the world's organic farmland was in Europe. While in former years this share amounted to one quarter of the world's organic farmland, it went down due to an impressive area increase in Australia (see Table 2, page 40).

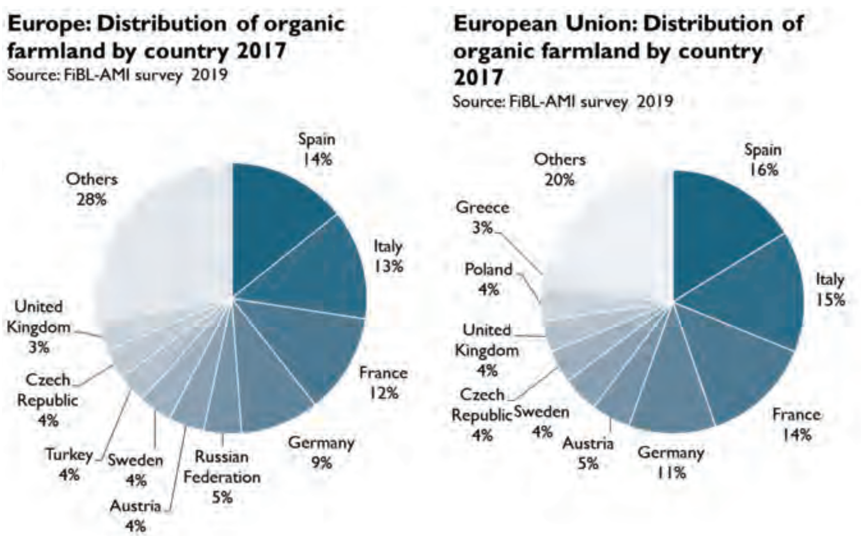

Figure 69: Europe: Distribution of organic farmland by country 2017

Source: FiBL-AMI survey 2019 based on national data sources and Eurostat
For detailed data sources see annex

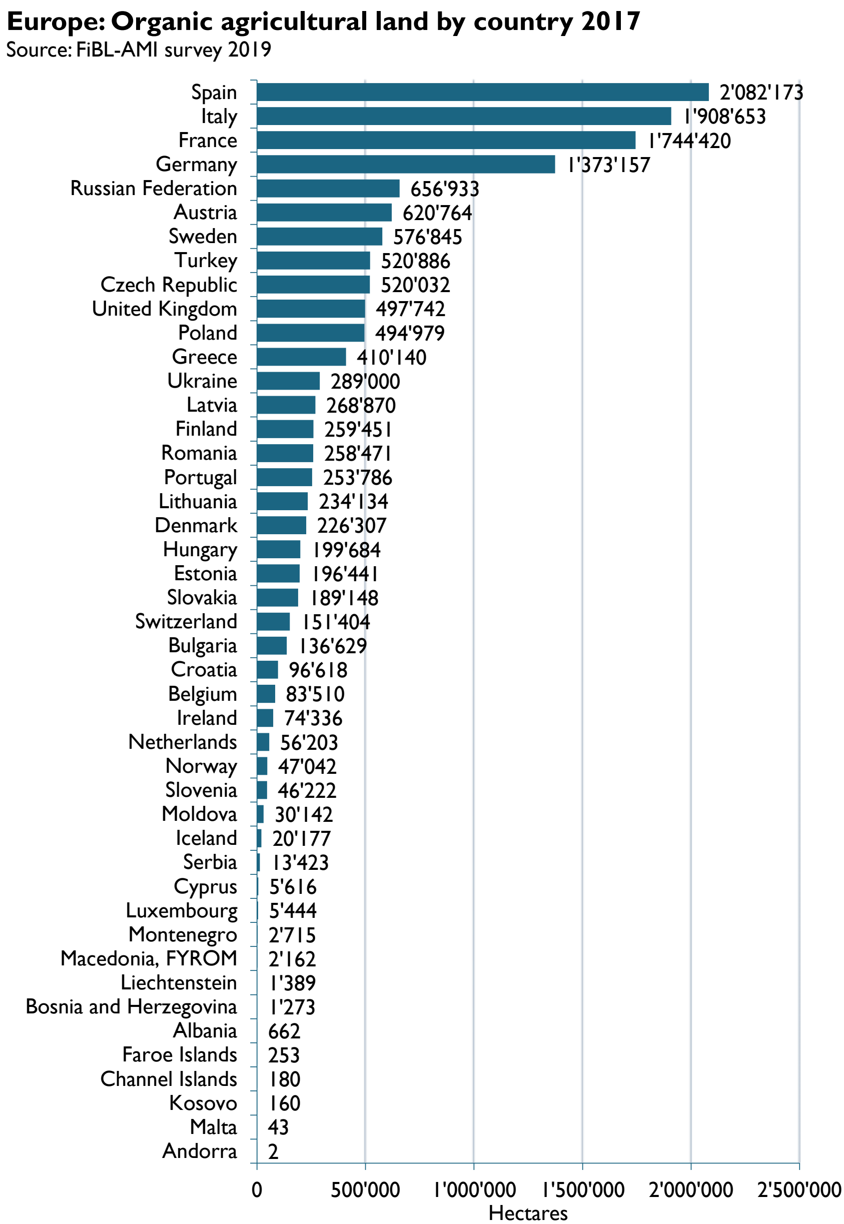

Figure 70: Europe: Organic agricultural land by country 2017

Source: FiBL-AMI survey 2019 based on Eurostat national data sources.
For detailed data sources see annex.

2.2 Organic shares of total agricultural land

In Europe, 2.9 percent of the agricultural land is organic and in the European Union, 7.2 percent (Table 54). In ten countries (European Union: eight), ten percent or more of the agricultural land is managed organically (Figure 71). The countries with the highest organic shares are Liechtenstein (37.9 percent), Austria (24.0 percent), Estonia (20.5 percent), and Sweden (18.8 percent). Liechtenstein is the country with the highest organic farmland share in the world.

2.3 Growth of organic agricultural land

In 2017, the organic agricultural land in Europe increased by 1 million hectares (EU: 0.8 million hectares) or 7.6 percent (EU 6.4 percent). Growth was therefore comparable with that of 2015 and 2016 and considerably faster than between 2011 and 2014 (Figure 72, Figure 73). In Europe, the absolute growth was higher than in the European Union, due to a major increase in organic farmland in the Russian Federation reported by one international certifier.

The countries that contributed the most to the growth were the Russian Federation France, Germany, and Italy, with almost 800’000 additional hectares together (Figure 74). The highest relative increases were in the Russian Federation (+108 percent)[1] and Malta (+81 percent). However, there were also countries that showed stagnation or only a small increase in organic land such as the United Kingdom or Slovakia. In some countries, such as Ukraine, Poland, and Bulgaria, the organic area decreased (Table 61).

2.4 Conversion status of organic farmland

Most, countries provided data on their fully converted and under-conversion areas, but such details are not available for all countries – for instance, for Austria, Germany, and Switzerland (Table 62).

In Europe, of the 14.6 million hectares of organic agricultural land, at least 9.3 million hectares were fully converted (8.3 million out of 12.8 million hectares the European Union), and at least 2.8 million hectares were under conversion (2.5 million in the European Union). This suggests that, in the near future, an increase in the supply of organic products can be expected (Figure 75).

By country, the largest in-conversion areas are in Central Eastern European countries, notably Romania (109'365 hectares), Poland (108'655 hectares), Hungary (95'200hectares), and Bulgaria (88'166 hectares) (Table 62).

[1]We assume that some of this increase is due to the more complete data received for this survey.

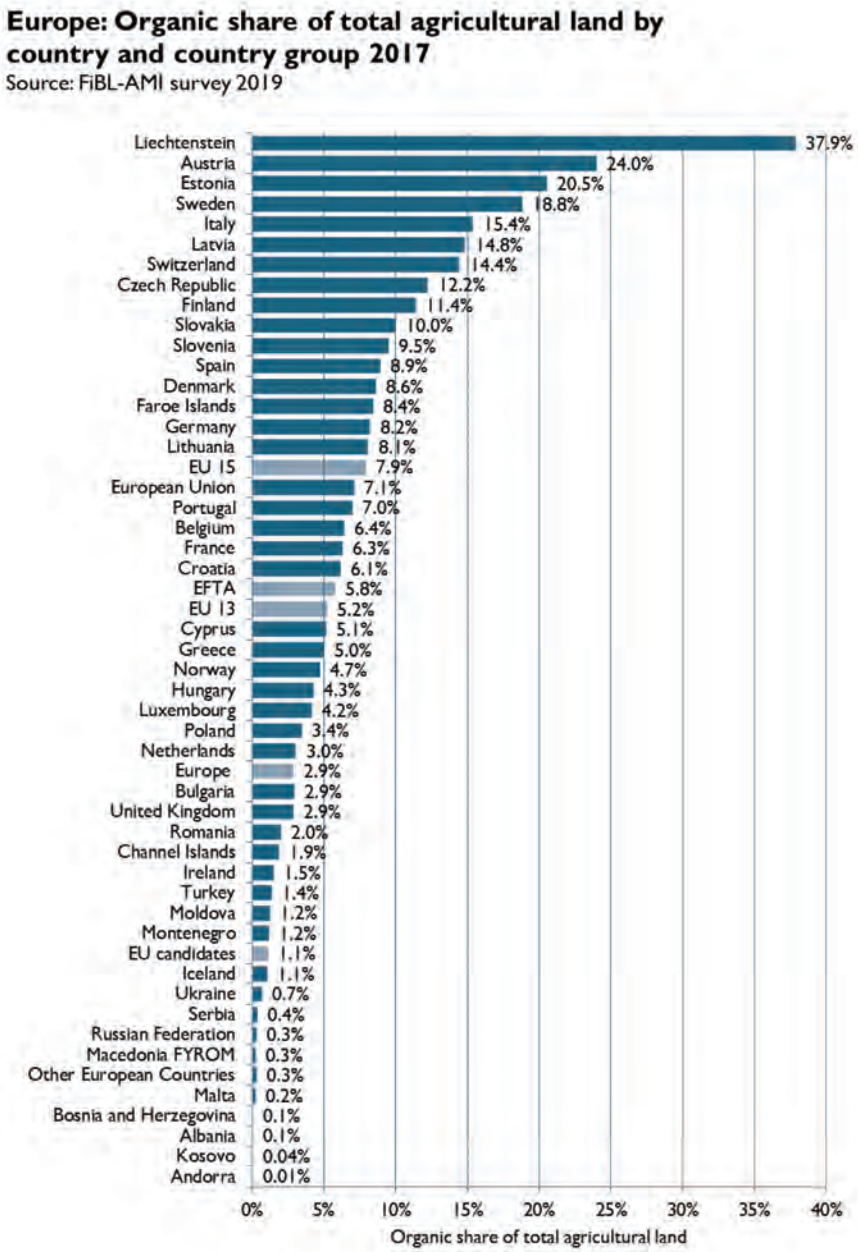

Figure 71: Europe: Organic shares of total agricultural land 2017

Source: FiBL-AMI survey 2019 based on national data sources and Eurostat
For detailed data sources see annex of this book.
EU Candidates = Candidates and Potential Candidate countries of the European Union; EFTA = European Free Trade Association; EU = European Union; EU-13 = countries, which became members of the European Union in or after May 2004; EU-15 = countries, which were member countries of the European Union before May 2004.

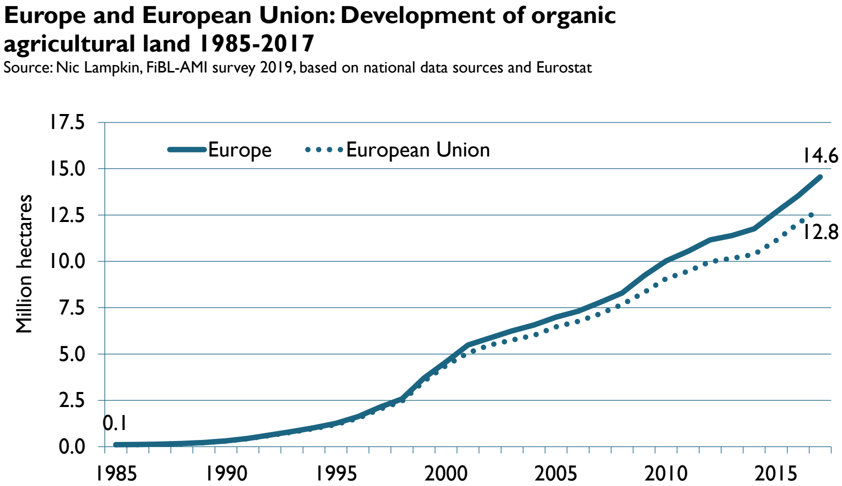

Figure 72: Europe and the European Union: Development of organic agricultural land 1985-2017

Source: FiBL-AMI Surveys 2006-2019 based on national data sources and Eurostat. Data from before 2000 based on surveys from Nic Lampkin. The data for the European Union cover all countries that were members of the European Union in 2017.

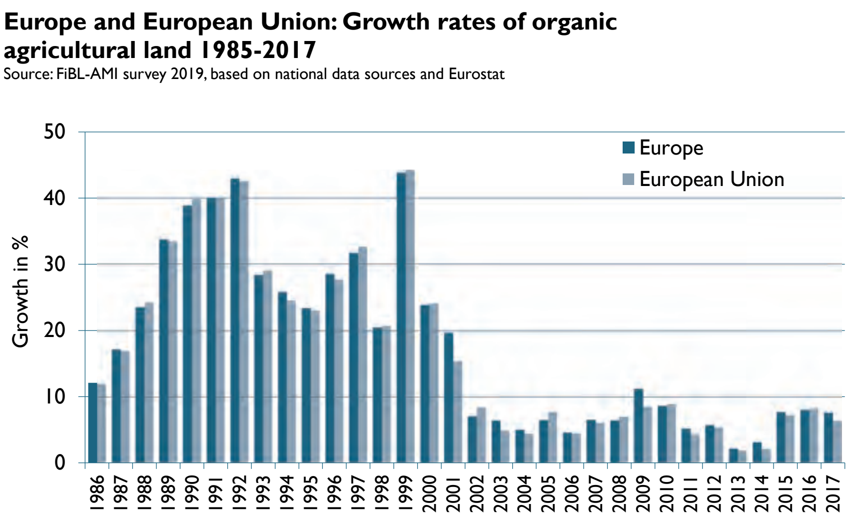

Figure 73: Europe: Growth rates for organic agricultural land in Europe and the European Union 1985-2017

Source: FiBL-AMI Surveys 2006-2019 based on national data sources and Eurostat. Data from before 2000 based on surveys from Nic Lampkin. For detailed data sources see annex.

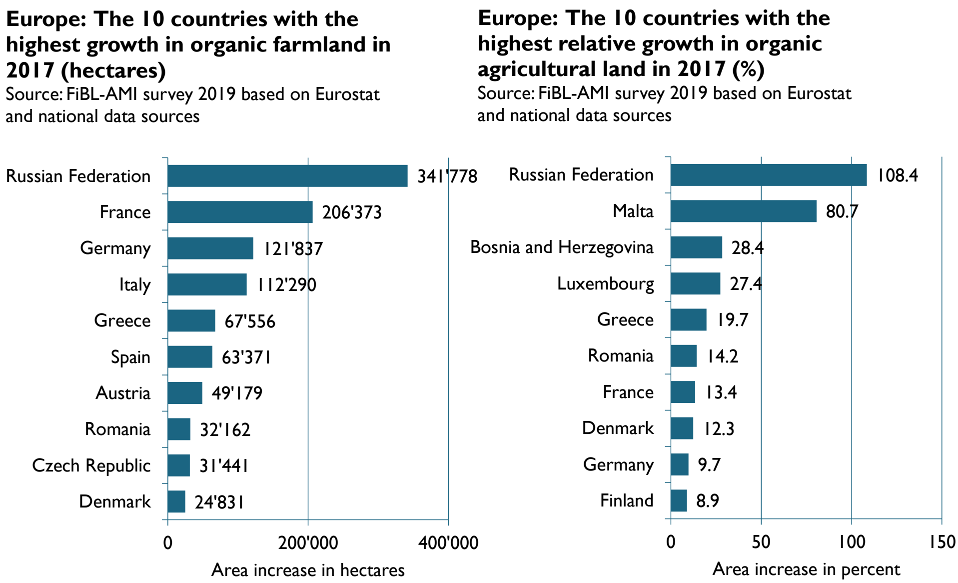

Figure 74: Europe: The ten countries with the highest growth in organic agricultural land in hectares and percentage in 2017

Source: FiBL-AMI survey 2019 based on national data sources and Eurostat
For detailed data sources see annex.

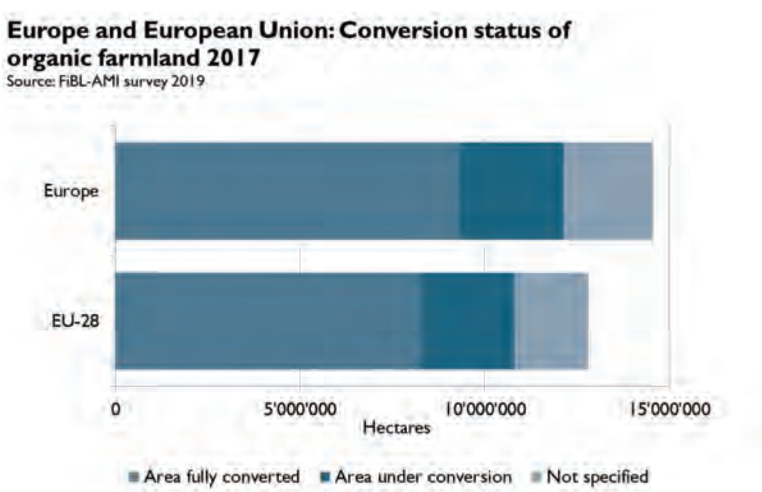

***Figure* 75: Europe and the European Union: Conversion status of organic land in Europe and the European Union 2017**

Source: FiBL-AMI survey 2019 based on national data sources and Eurostat
For detailed data sources see annex.

3 Land use and crops grown in organic agriculture

3.1 Land use

For all countries in Europe, land use and crop details are available. In this respect, Europe differs substantially from other parts of the world, for which such data is often not available. The area for all land use types[1] has grown steadily since 2004.[2]

Table 55: Europe and the European Union: Land use 2017

Crop group	Europe [Million hectares] (Share of total)	European Union [Million hectares] (Share of total)	Change 2016-2017 Europe/EU [%]	Change 2008-2017 Europe/EU [%]
Arable land	6.8 (5.7%)	5.5 (4.6%)	9.9%/5.4%	98%/83%
Permanent grassland	5.9 (3.1%)	5.7 (8.9%)	4.4%/4.6%	53%/52%
Permanent crops	1.6 (8.7%)	1.4 (11.7%)	5.3%/6.4%	116%/103%
Total	**14.6 (2.9%)**	**12.8 (7.2%)**	**7.5%/6.4%**	**76% / 67%**

Source: FiBL-AMI survey 2019 based on national data sources Eurostat.
Note: Total includes other agricultural land and correction values for double-cropped areas.

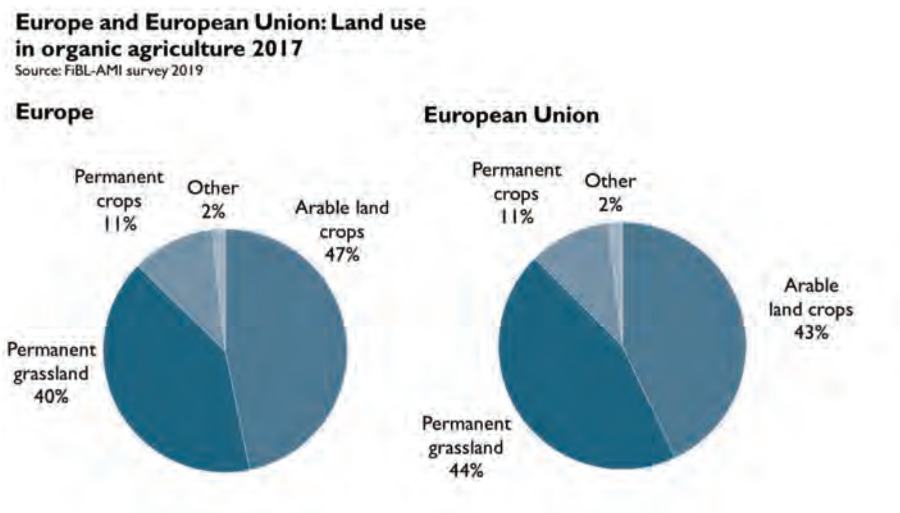

Figure 76: Europe: Distribution of land use in organic agriculture 2017

Source: FiBL-AMI survey 2019 based on Eurostat and national data sources

[1] The main land use types are:
- Arable land crops (mainly cereals, fresh vegetables, green fodder and dry pulses and oilseeds),
- Permanent grassland (pastures and meadows), and
- Permanent crops (fruit trees and berries, olive groves and vineyards).

[2] In 2004, FiBL started its data collection on organic crop and landuse data.

Table 55 and Figure 76 show that arable land constitutes a large part of the organic farmland, with 6.8 million hectares in Europe and 5.5 million hectares in the European Union (47 and 43 percent of the organic farmland, respectively). The arable land share is higher in Europe as the Russian Federation and Ukraine have large areas for the production of cereals, oilseed, and dry pulses. Permanent grassland accounted for 5.9 million hectares in Europe and 5.7 million hectares in the European Union. Permanent crops constituted 11 percent of the organic farmland with 1.6 and 1.4 million hectares in Europe and the European Union, respectively. Compared to total agriculture (based on FAO land use data and not strictly comparable), the organic arable land constitutes 5.7 percent of the total arable land in Europe and 4.6 percent in the European Union. Whereas the organic share of total permanent grazing area is as high as 8.9 percent in the European Union, it is lower in Europe (3.1 percent). Permanent crops have the highest organic shares: 11.7 percent in the European Union and 8.7 percent in Europe.

The largest increase in 2016-2017 was in arable crops (9.9 percent in Europe), mainly because additional organic arable area was reported for Russia. In the European Union, arable land increased less, by 5.4 percent. Grassland and permanent crops increased by approximately 5 percent (Table 55, Figure 78, Figure 79). Both arable and permanent crops almost doubled in the decade 2008-2017 and thus showed a greater increase than the permanent grassland, which grew by about 50 percent (Table 55, Figure 78, Figure 79). It also shows the intensification of organic agriculture as the importance of extensive grassland is decreasing. By country, the largest permanent grassland or grazing area is in Spain with more than one million hectares, followed by Germany and France (Figure 77). The largest cropland area (i.e., arable and permanent crops together) is in Italy (1.3 million hectares), Spain and France (1.0 million hectares). (Figure 77).

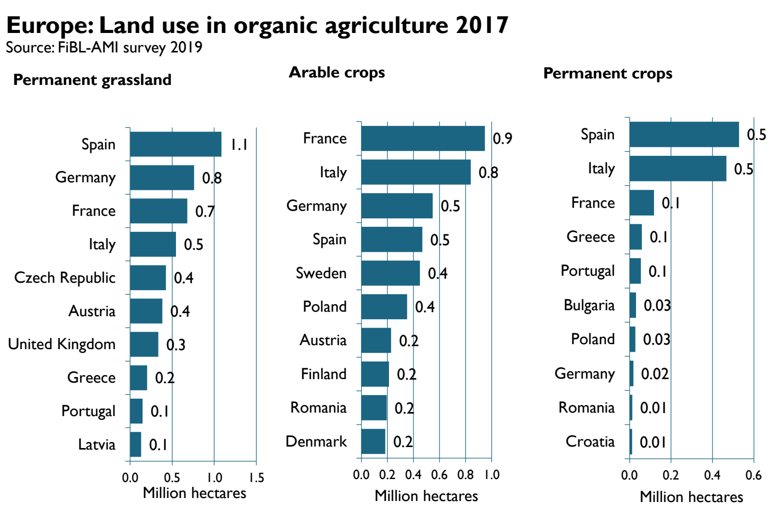

Figure 77: Europe: Land use in organic agriculture by top 10 countries 2017

Source: FiBL-AMI survey 2019 based on Eurostat and national data sources

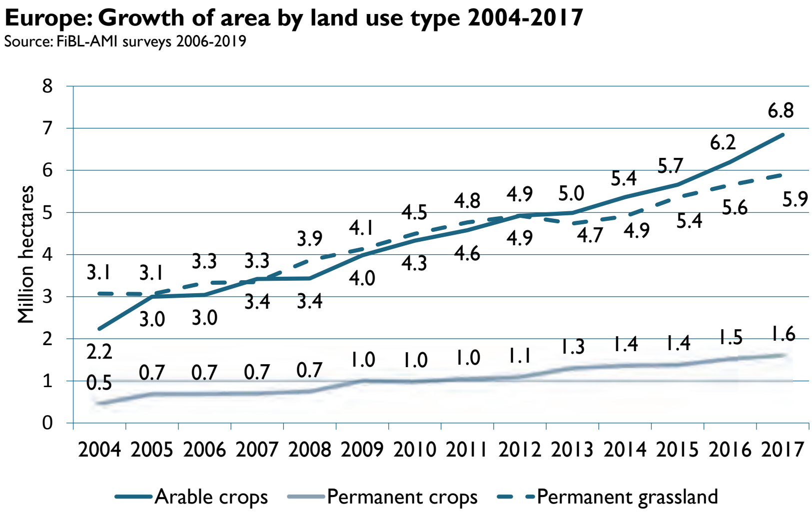

Figure 78: Europe: Growth in organic agricultural land by land use type 2004-2017

Source: FiBL-AMI Surveys 2006-2019 based on national data sources and Eurostat

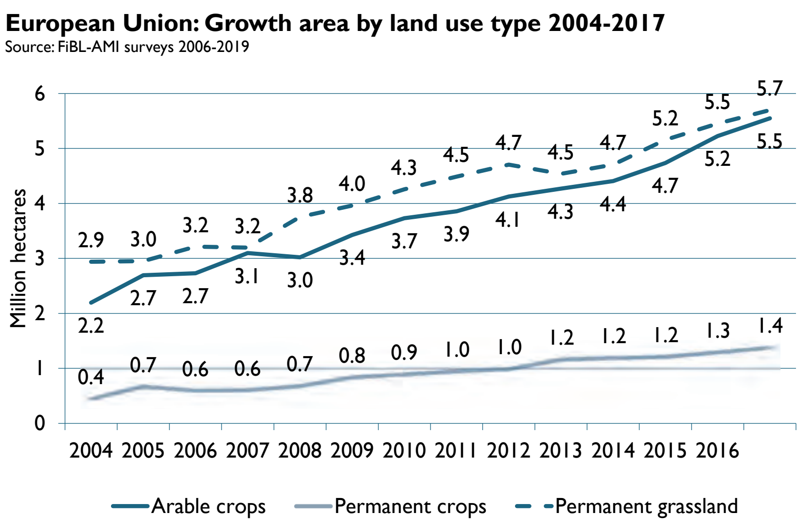

Figure 79: European Union: Growth in organic agricultural land by land use type 2004-2017

Source: FiBL-AMI Surveys 2006-2019 based on national data sources and Eurostat

3.2 Crops grown in organic agriculture

Except for temperate fruits, which showed a small decline in the European Union, all key arable and permanent crop groups showed growth in Europe and the European Union (Table 56).

Table 56: Europe and the European Union: Key crops/crop group 2017

	Crop group	Area (ha)		Organic share (%)		Change 2016-2017		Change 2008-2017	
		Europe	EU	Europe	EU	Europe	EU	Europe	EU
Arable crops	Cereals	2'529'808	1'994'581	1.9%	3.5%	8%	6%	69%	50%
	Dry pulses	442'863	386'310	8.7%	18.1%	2%	1%	207%	223%
	Oilseeds	449'439	269'694	1.3%	2.3%	6%	19%	251%	231%
	Green fodder	2'376'880	2'198'433	N/A	N/A	5%	6%	99%	92%
	Root crops	52'032	38'528	0.6%	1.2%	24%	15%	41%	33%
	Vegetables	172'792	158'928	3.4%	6.8%	17%	17%	104%	69%
Permanent crops	Berries	40'490	36'726	14.2%	22.3%	12%	10%	87%	70%
	Citrus fruit	55'081	54'322	7.5%	9.1%	12%	12%	126%	130%
	Temperate fruit	134'038	101'476	4.8%	7.8%	8%	-1%	79%	63%
	(Sub)Tropical fruit	38'146	14'016	16.8%	8.9%	25%	17%	N/A	N/A
	Grapes	340'038	323'014	8.7%	10.3%	4%	3%	166%	177%
	Nuts	313'766	264'529	18.5%	27.2%	17%	13%	111%	104%
	Olives	592'647	510'859	10%	10.2%	3%	4%	92%	72%

Source: FiBL-AMI survey 2019 based on national data sources and Eurostat. Totals for arable and permanent crops include further crop groups
Note: For crop details by country, please check crop chapter in this book from page 94 and statistics.fibl.org

Arable crops

A large proportion of the organic arable land (6 million hectares in Europe and 5.5 million in the European Union) is used for the production of cereals and green fodder from arable land, which, together, account for about two-thirds of the organic arable land. Regarding the organic share, dry pulses are the most successful crop; in the European Union, they account for almost one-fifth of the total dry pulses area. In organic farming they are important for crop rotation and animal feeding, and have disappeared in conventional farming as protein crops for animal feeding are imported, and crop rotation is replaced by fertiliser. Of the major groups, vegetables and oilseed showed the highest increase in land area, reflecting that European organic farmers are meeting the increasing market demand for vegetables and feedstuffs. Over the decade 2008-2017, the largest growth was noted for oilseed and dry pulses, which more than trebled. For more information about crop groups by country, see the crop chapters in this book (page 94) and our online database at statistics.fibl.org.

- **Cereals** were the largest crop group in Europe and accounted for 2.5 million hectares or 1.7 percent of the arable land in Europe, and in the European Union, they were the second largest group, accounting for 1.9 million hectares or 3.5 percent of the total cereal area. Wheat is the most important cereal (almost 1 million hectares). The countries with the largest cereal areas are Italy (approx. 300´000 hectares, including large areas of durum wheat), Germany (approx. 270´000 hectares), and France (approx. 240´000 hectares). The highest organic shares of the total cereals area are in Austria (14.6 percent), Sweden (11.4 percent) and Estonia (11.1 percent). Outside the European Union, Turkey, the Russian Federation, and Ukraine are major cereal producers.
- In the European Union, the arable crop group with the largest area was **plants harvested green** (green fodder from arable land) with 2.2 million hectares (Europe: 2.4 million hectares). Clover, green maize, and grass on arable land were the main crop types.
- In 2017, organic **vegetables**[1] were grown on more than 170’000 hectares of land in Europe, and almost 160’000 hectares in the European Union, covering 2.9 percent and 5.8 percent of the vegetable area respectively. While vegetables had the largest growth of the major crops groups in 2017, compared to the other crop groups, they did not grow as fast in the decade 2008-2017. This is because vegetables are one of the pioneer crops of organic agriculture, and strong growth already occurred in the previous decades. The largest areas were in Italy (54'720 hectares), France (20'866 hectares), and Spain (20'331 hectares). High organic shares of all vegetables are found in Denmark (33.3 percent) and Austria (24 percent).
- With 440’000 hectares in Europe and 390´000 hectares in the European Union, organic **dry pulses** accounted for a large share of all dry pulses (8.7 percent in Europe; 18.1 percent in the European Union). One reason is that the conventional crop area has been decreasing for many years due to the availability of cheap protein like soybeans on the world market for both animal feed and human consumption. The strong growth of dry pulses and their high organic shares also reflects the efforts of European organic farmers to improve soil fertility and to become less dependent on imports of protein crops. The countries with the largest areas of dry pulses were France (97'405 hectares), Italy (49'730 hectares), and Poland (43'373 hectares). The highest organic shares were found in Greece (64 percent), Austria (57 percent), and Denmark (51 percent).

Permanent crops

A large part of the permanent cropland (1.6 million hectares in Europe and 1.4 million hectares in the European Union) is used for olives, grapes, and nuts. Olives cover one-third of the permanent crop area, and grapes one fifth. Over the decade 2008-2017, the largest growth was noted for grapes, which more than tripled. In Europe, olives (0.59

[1] It should be noted that for some countries, potatoes are included in the vegetable category.

million hectares) and grapes (0.34 million hectares) cover half of the permanent cropland (Table 56). Both reach an organic share of almost ten percent of their respective totals.

The organic shares for most permanent crops were higher than those for the arable crops. However, it should be noted that the FAO data, with which the organic data are compared, do not include all berries or nut types grown in organic agriculture. Thus, a direct comparison is not possible in all cases. For more information about crop groups by country, see crop chapters in this book (page 94) and our online database at statistics.fibl.org.

- Spain and Italy had an organic **grape** area of more than 100’000 hectares each, and, together with Austria (12.2 percent), they had the highest organic shares of grapes (except some minor organic grape producers that reach even higher shares, such as the UK or Belgium). In Italy, 15.8 percent of the grape area is organic and 11.6 percent in Spain.
- For **olives**, Italy and Spain also have the lead (235'741 hectares and 195'114 hectares, respectively). Malta (32.5 percent) and France (27.3 percent) have the highest organic shares. The largest growth occurred in Italy, where the organic olive area increased by more than 13’000 hectares in 2017.
- Temperate fruits are grown on 134’038 hectares (European Union 101’474 hectares), and they cover 4.8 percent of the total temperate fruit area (7.8 percent in the European Union). Several countries in the European Union have a considerable amount of land dedicated to temperate fruit (e.g., apples in Poland and berries in the Baltic countries, both for processing rather than for the fresh market). The most important fruits were apples (55’893 hectares), plums (15’008 hectares), and cherries (15’385 hectares). The largest temperate fruit producers are Turkey (26'073 hectares), where a major increase was noted, Italy (24'825 hectares) and France (16'707 hectares); the highest organic area shares are found in Latvia (43 percent).

3.3 Further organic areas

In addition to the agricultural land, there are further organic areas. Large parts of these are wild collection areas constituting 17.0 million hectares (European Union: 14.7 million hectares). The largest wild collection area in Europe (and in the world) is in Finland with 11.6 million hectares (mainly berries). For country details on wild collection areas, see Table 64.

4 Organic livestock

Statistics on the number of organic animals are incomplete and do not currently allow for a complete picture of the sector. However, taking into account all currently available information, the organic animal sector is developing at a fast pace in European countries. Table 57 provides a European overview of organic livestock in 2017. In many countries, organic animal husbandry began with beef, lamb, and milk production. In Europe, 4.4 million bovine animals, 5.2 million sheep, almost 1 million pigs, and 50 million poultry were kept (For European Union data, see Table 57).

Table 57: Europe and the European Union: Organic livestock 2017

	Europe				European Union	
	Animals [head]	Organic share of total [%]	Change 2016-2017 [%]	Change 2008-2017 [%]	Animals [head]	Organic share of total [%]
Bovine animals	4'398'530	3.5%	13.9%	75.8%	4'159'911	5.2%
Sheep	5'187'715	3.4%	13.1%	73.6%	4'941'613	5.0%
Pigs*	998'828	0.6%	0.5%	47.6%	961'212	0.7%
Poultry**	50'145'275	2.0%	9.7%	103..%	47'384'977	3.3%

Source: FiBL-AMI Survey 2019 based on Eurostat and national data sources.

Notes: *Data for the calculation of organic shares are based on Eurostat and FAOSTAT. The numbers for the organic shares of all livestock are based on FAOSTAT data. FAOSTAT only provides totals for bovine animals, sheep, pigs, and poultry, without further specifications. Please note that growth rates from 2008-2017 were similar for Europe and the European Union and are hence not included in the table.*
** Please note there is no consistent reporting in the official statistics, no clear distinction is made between the number of animals slaughtered, the places or average numbers of stock. Therefore, the data should be treated with caution.[1] According to the Agricultural Market Information Company AMI, the average stock of fattening pigs was 454'247 in Europe, and 494'700 in the European Union.*
***Also for poultry, there is no consistent reporting. According to the Agricultural Market Information Company AMI, the average stock was 41'569'199 in Europe, and 40.561.932 in the European Union.*

The organic share of all livestock remains small compared to some of the crop groups, depending on the animal species (between 0.6 percent and 5.2 percent (Table 57). Monogastric animals (pigs and poultry) account for the lowest shares, partly because of insufficient local supply of organic feed, the difficulties in the provision of traceable certified feed imports, the high investment in pig and poultry barns and pens, and the high price premiums consumers have to pay. The highest organic shares were for sheep and cattle as conversion of these rather extensive production schemes is easier. At the same time, not all of this organic production is sold on the organic market at a premium price.

[1] In the case of pigs and poultry, in the official statistics, no clear distinction is made between the number of animals slaughtered and the places or average numbers of stock over the year, and it is not always clear which of these is given when "livestock numbers" are quoted. Adding up the data for pigs and poultry over all countries, therefore, is not completely reliable and country data are not necessarily comparable. The data that are presented here should, therefore, be treated with caution and are only an approximation of the overall picture.

Between 2008 and 2017, the greatest increase was in poultry (more than 100 percent), which can be partly attributed to the high demand for eggs (see the section on the organic market in Europe; Table 60). However, beef and dairy cattle also grew substantially in that decade (+65 percent), as did sheep (+74 percent) and pigs (+48 percent) (Table 57).

For bovine animals (4.4 million head in Europe), the largest numbers are found in Germany, France, and Austria (Table 65). The highest organic shares are in Latvia, Liechtenstein, Sweden, and Austria (all more than 20 percent). For sheep (5.2 million head in total), the largest numbers are in Greece, the United Kingdom, and Italy. The highest organic shares are in the three Baltic countries[1] and the Czech Republic (all with more than 40 percent). Looking at the available data for pig stocks (1 million head), Germany, Denmark and France have the highest numbers. For poultry (50 million head), we assume that – like for pigs – country-level data is not comparable, due to different definitions (Table 65).

Organic cow's milk

Organic cow's milk production is one of the production-related indicators with good coverage across all European countries. Organic cow's milk has almost doubled since 2008 to meet rising demand for milk and dairy products. Production now stands at 4.7 million metric tons (European Union: 4.4 million), constituting 3.0 percent of the European Union's milk production from dairy cows in 2017 (Figure 80).

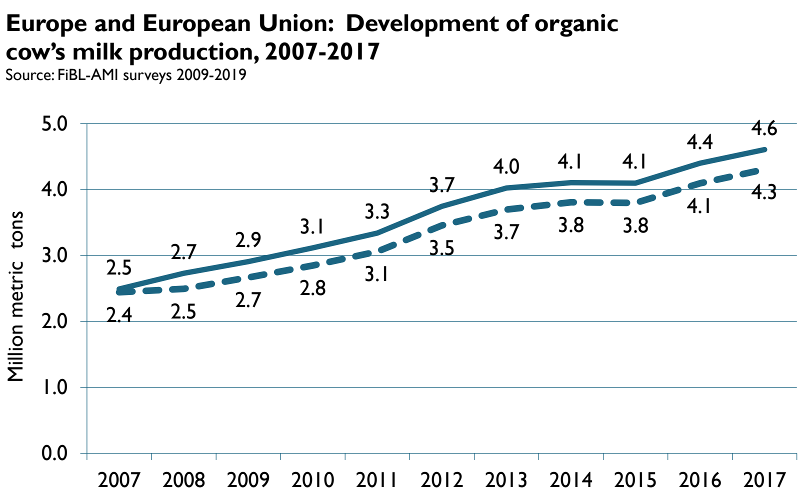

Figure 80: Europe and the European Union: Development of organic cow's milk production 2007-2017

Source: FiBL-AMI survey 2009-2019

[1] Estonia, Latvia and Lithuania

5 Producers, processors, importers, and exporters

While data on organic producers are available for almost all countries, this is not the case for processors and importers and even less for exporters. Although data availability is improving, it is still not possible to draw a clear picture for the latter groups over the years. Hence, in the table below, a ten-year development is not shown for the number of exporters.

Table 58: Europe: Organic operators by country group 2017

	Europe			European Union		
	No.	Growth 1 year	Growth 10 years	No.	Growth 1 year	Growth 10 years
Producers	397'509	6.5%	78.7%	305'394	3.5%	54.8%
Processors	71'375	8.3%	108.2%	68'164	8.8%	106.3%
Importers	5'314	14.1%	74.5%	4'585	15.5%	75.8%
Exporters	2'916	30.4%		2'666	30.0%	

Source: FiBL-AMI survey 2019 based on national data sources and Eurostat. For a breakdown by country, see **Table 66**. *For detailed data sources see annex.*

5.1 Organic producers

In 2017, there were almost 400’000 organic producers in Europe and slightly more than 300’000 in the European Union (Table 58 and Table 66). In the European Union, the country with the largest number of producers was Italy (almost 67’000); in Europe, it was Turkey (more than 75’000) (Figure 83). Compared to the European Union (+3.5 percent), growth was stronger in Europe as a whole (+6.5 percent), mainly due to a major increase in Turkey and decreases in EU countries such as Poland and Romania. Over the decade 2008-2017, the number of producers in Europe increased by 79 percent (EU: +55 percent). Almost one-sixth of the world’s organic farmers are in Europe (Figure 81).

5.2 Organic processors and importers

There were more than 71’000 organic processors in Europe (+8.3 percent compared to 2016) and more than 68’000 in the European Union (+8.8 percent). The country with the largest number of processors was Italy (18’092). Double-digit growth was noted for importers; more than 5’300 importers (+ 14.1 percent) were counted in Europe and almost 4’600 in the European Union (+15.5 percent). Germany was the country, which had the most importers (1’687) (Table 58, Table 66, Figure 82).

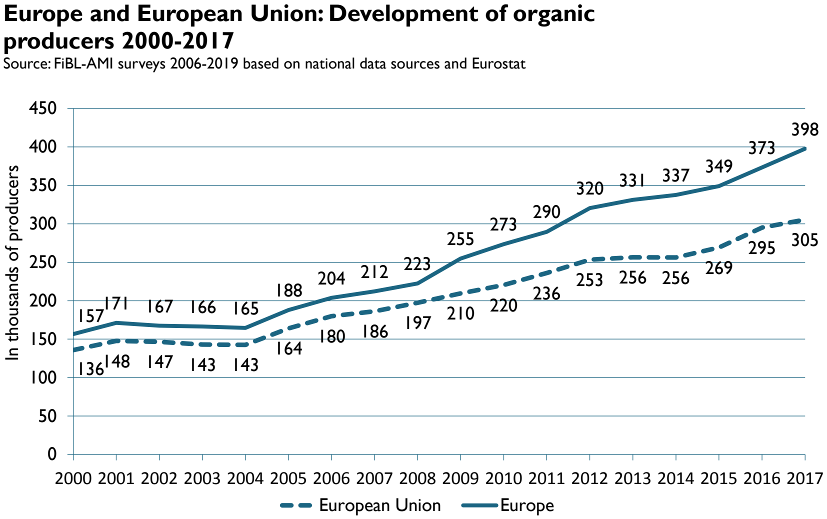

Figure 81: Europe and the European Union: Development of the number of organic producers in 2000-2017

Source: FiBL-AMI surveys 2006-2019 based on national data sources and Eurostat

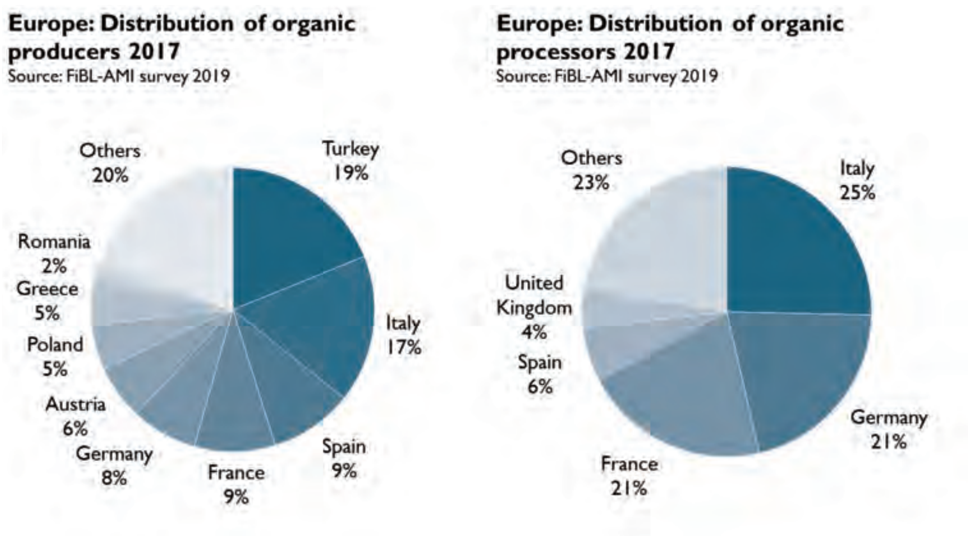

Figure 82: Europe: Distribution of organic producers and processors by country 2017

Source: FiBL-AMI survey 2019, based on national data sources and Eurostat.

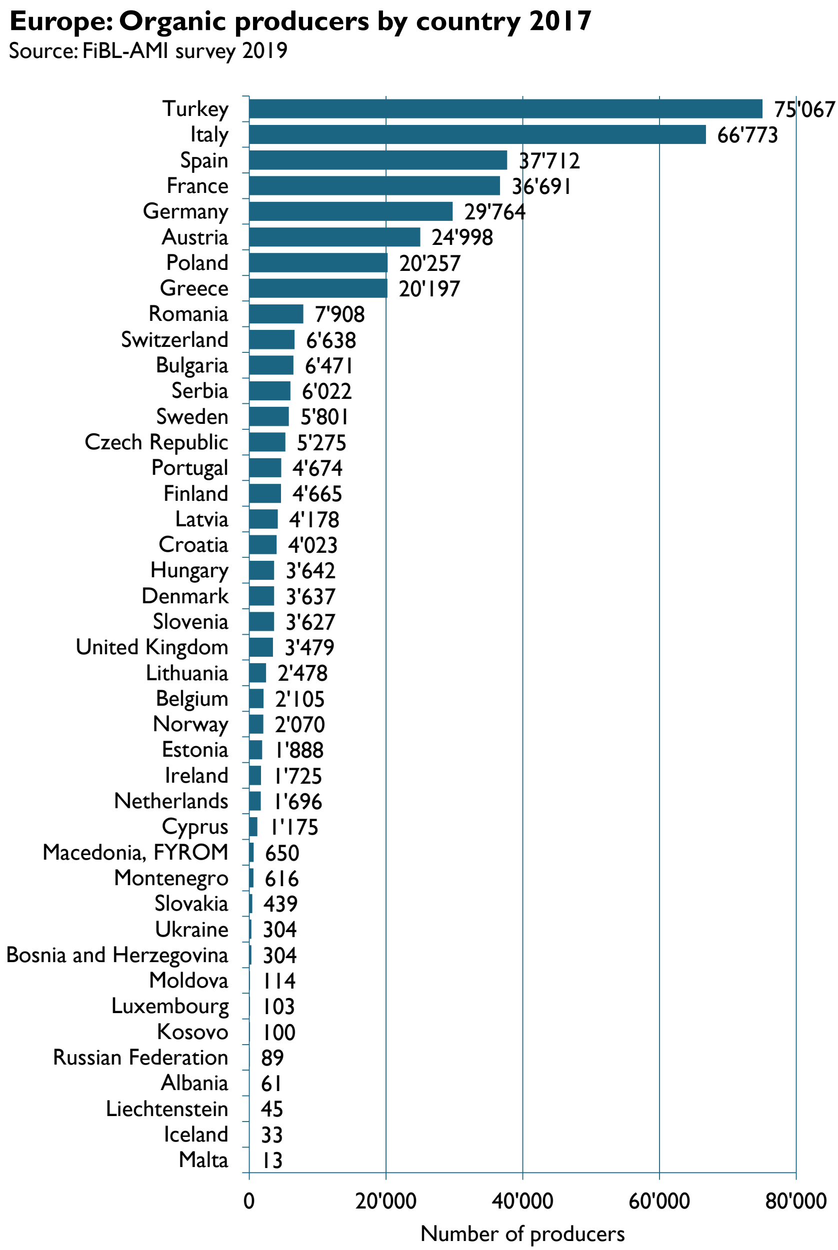

Figure 83: Europe: Number of organic producers by country 2017

Source: FiBL-AMI survey 2019 based on national data sources and Eurostat. For detailed data sources see annex.

6 Organic retail sales

In 2017, the organic market in Europe grew to 37.3 billion euros (European Union: 34.3 billion euros). Unfortunately, not all countries provide data on their domestic markets on a regular basis (Table 67), and it may, therefore, be assumed that the market is larger than indicated by the figures in Table 59 and Table 13.

Table 59: Europe and the European Union: Organic retail sales 2017: Key data

	Retail sales [Million €]	Per capita consumption [€]	Growth 2016-2017 [%]	Growth 2008-2017 [%]
European Union	34'285	67.2	10.9%	89.5%
Europe	37'341	47.0	10.5%	94.2%

Source: FiBL-AMI survey 2019 based on national data sources. For country details, see Table 67.

6.1 Size of the organic market

Germany continues to be the largest market in Europe (10 billion euros) (Figure 85), and, after the United States, it is the second biggest organic market in the world. France holds second place in Europe with 7.9 billion euros. Comparing organic markets worldwide by single market, the United States has the lead: 44 percent of global retail sales of organic products are in the United States (40.0 billion euros), followed by the European Union (34.3 billion euros; 37 percent of organic global retail sales, Figure 84). Comparing retail sales by continent, North America is the largest market (43 billion euros) (Figure 12).

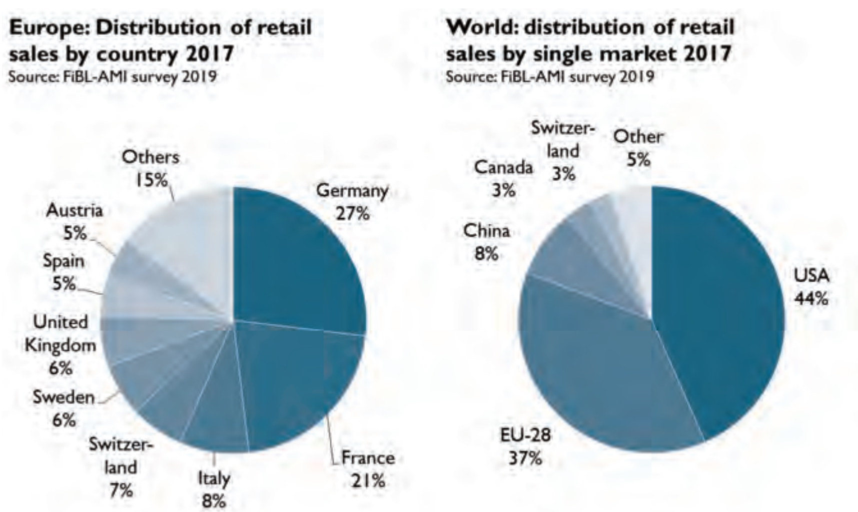

Figure 84: Europe: Distribution of retail sales by country and by single market worldwide 2017

Source: FiBL-AMI survey 2019 based on national data sources

Europe: Organic retail sales value by country 2017
Source: FiBL-AMI survey 2019

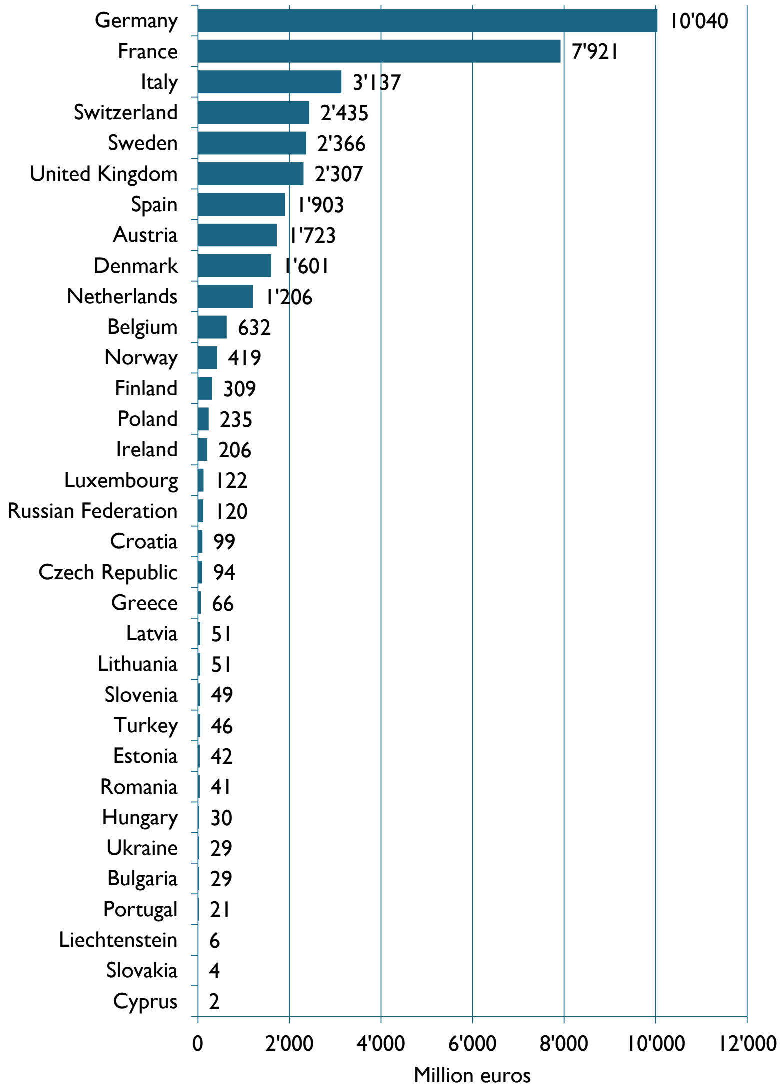

Figure 85: Europe: Retail sales by country 2017

Source: FiBL-AMI survey 2019 based on national data sources (only countries with a turnover of more than one million euros). Please note, that 2017 data were not available for all countries. For detailed data sources see annex.

6.2 Growth of the organic market

The organic market grew by more than 10 percent in both Europe and the European Union in 2017. It is the third time since the financial crisis in 2008 that double-digit growth occurred in Europe. In the decade 2008 to 2017, the organic market almost doubled in size (Figure 86).

All countries for which new data was available showed growth, many double-digit (Figure 87). With 18 percent, France showed the highest increase followed by Spain (16 percent) (Figure 87, Table 67).

In the United Kingdom, where retail sales had been decreasing for several years, growth was noted for the sixth consecutive year (6 percent increase in 2017). It should be noted that UK sales in euros show a drop for the years 2015-2017, due to the exchange rate loss of the British pound after the Brexit vote.

In 2018, the market in many European countries experienced further double-digit growth. Figures are expected to be available at the beginning of 2019.

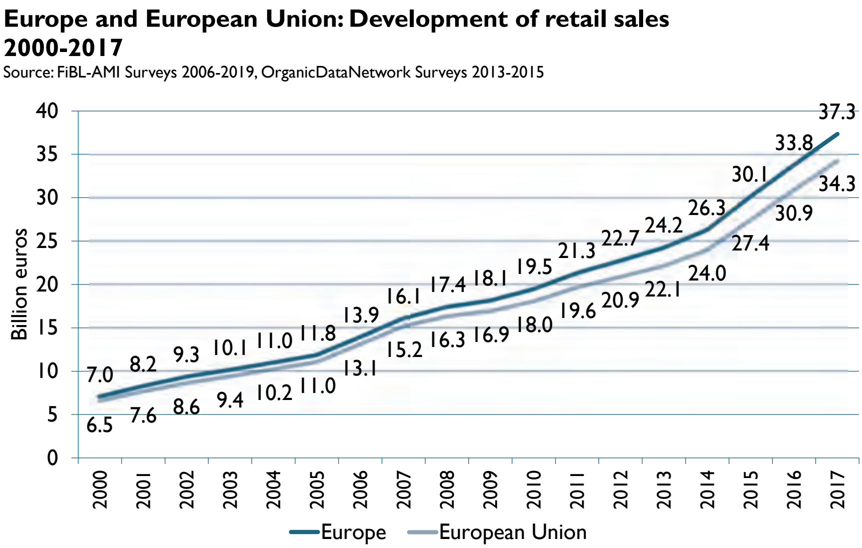

Figure 86: Europe: Growth of organic retail sales in Europe and the European Union, 2000-2017

Source: FiBL-AMI surveys 2004-2019, and OrganicDataNetwork Surveys 2013-2015

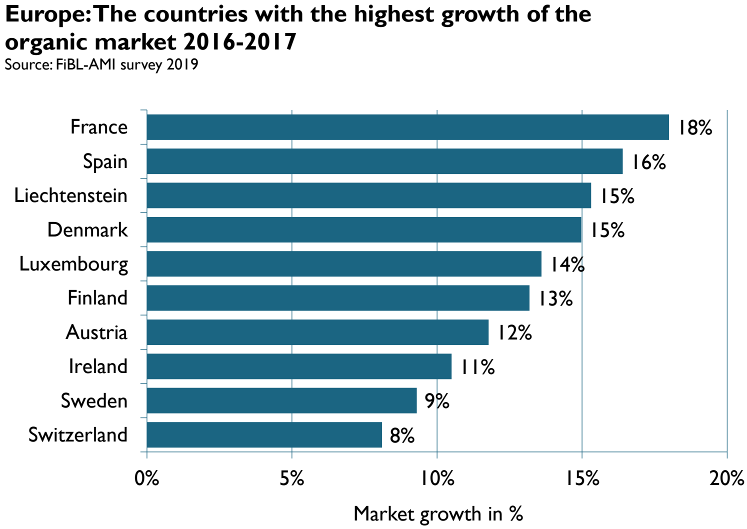

Figure 87: Europe: The countries with the highest organic market growth 2017

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

6.3 Per capita consumption of organic food

Like in the previous years, the highest per capita consumption of organic food was in Switzerland (288 euros), followed by Denmark (278 euros). Eight countries had a per capita consumption of more than 100 euros in 2017 (Figure 88, Table 67).

The continual growth in consumer interest is well documented by the growth of per capita consumption, with specific notable growth in 2017 (Figure 89). The per capita consumption in Europe rose to 47 euros and to 67 euros in the European Union.

In the Central Eastern European countries, consumer spending is still low (Table 67). There are indications that markets are currently developing fast, especially in the Baltic countries,[1] however, retail sales data are scarce for some countries and not regularly updated. Whereas the availability and accessibility of area and operator data is good, the Czech Republic is the only country with a permanent collection system for retail sales data.

[1] Estonia, Latvia and Lithuania.

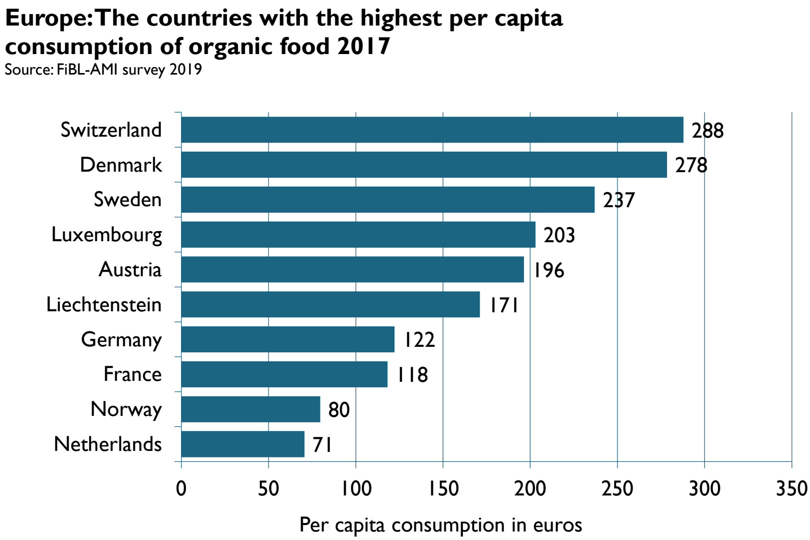

Figure 88: Europe: The countries with the highest per capita consumption 2017

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

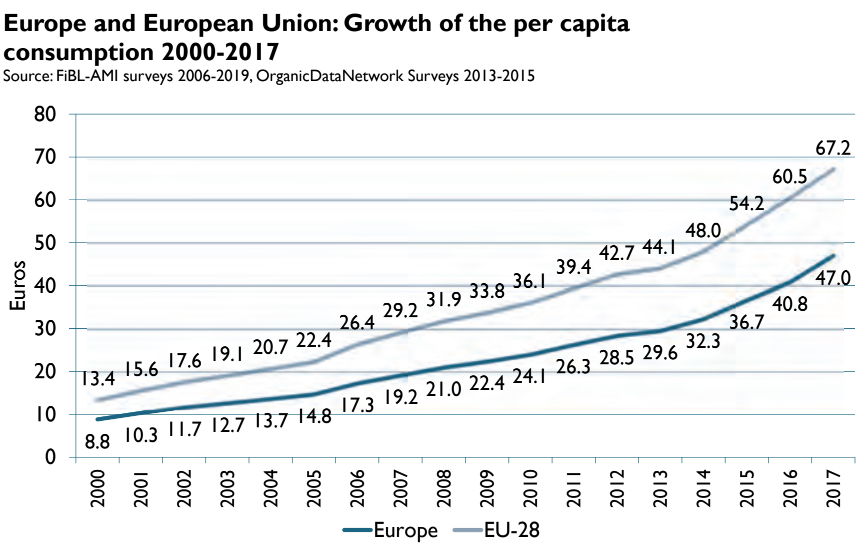

Figure 89: Europe: Growth of the per capita consumption 2000-2017

Source: FiBL-AMI survey 2019 based on national data sources. Calculation based on Eurostat population data. For detailed data sources see annex.

6.4 Organic market shares

The organic share of overall retail sales shows the importance that the organic market has in a given country. As in the past, the highest market shares were reached in Denmark (13.3 percent, highest organic market share in the world), Sweden (9.1 percent), and Switzerland (9.0 percent) (Figure 90, Table 67). The fact that, in many countries, the total food market is not growing and that, in many cases, food prices are decreasing makes organic shares grow even faster. Market shares of individual products and product groups can be far higher; these data are provided in Table 60. As there are no retail sales data for Europe or the European Union as a whole, it is not possible to calculate overall organic market shares.

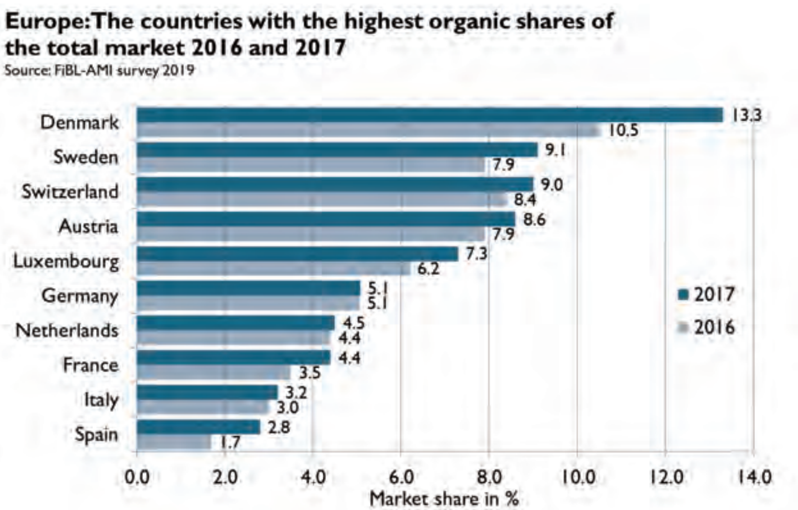

Figure 90: Europe: The countries with the highest shares of the total retail sales 2017

Source: FiBL-AMI survey 2019 based on national data sources. For detailed data sources see annex.
Notes: For Denmark, the 2016 figure was revised and is higher than what was communicated previously. Sweden: The 2016 figure is from Statistics Sweden, the 2017 figure is from Ecoweb, and hence a direct comparison is not possible. Luxembourg: Organic market data shares were revised and differ from what was communicated earlier.

6.5 Comparison of organic products and product groups with the total market

While the organic share of the total market is an important indicator, it is also important to look at the organic market shares that individual products can have.

In many countries, organic eggs are one of the success stories within the total retail market, and they reach impressive proportions of the total egg market. Table 60 shows that, in Denmark and France, eggs reach organic market shares of approximately 30 percent (in value).

Table 60: Organic shares for retail sales values (euros) for selected products 2017

	Austria	Belgium	Czech Republic (2016)	Denmark	Finland	France	Germany	Netherlands	Nor-way	Spain	Sweden	Switzerland	UK
Baby food					15.0%	12.7%			33.1%				
Beverages			0,4%			5.%			0.6%		5.6%	3.3%	
Bread & bakery products		2.4%	0.4%		1.0%	3.4%	8.%	1.4%	1.9%		3.5%	4.9%	0.3%
Eggs	21.6%	14.5%		32.6%	17.0%	29.6%	21.%	15.3%	8.7%	2.9%		26.6%	6.9%
Fish and fish products		0.4%				2.5%		1.2%	0.8%	0.6%	12.9%		0.8%
Fresh vegetables	15.3%			20.4%	3.9%	6.3%	9.7%		4.5%	3.3%	12.2%	23.1%	4.3%
Fruit	10.9%			18.8%		7.7%	7.8%		2.3%	1.7%	18.4%	13.9%	2.7%
Vegetables and fruit			1.3 %		3.9%	6.9%		4.0%				16.9%	
Meat and meat products	4.5%		0.2%		1.1%	2.4%	2.5%	3.3%	0.5%	1.2%	2.9%	5.6%	1.4%
Milk and dairy products	11.1%		1.4%			4.4%		4.3%	2.0%	1.1%	10.4%	12.9%	3.8%
- Butter	10.6%	4.7%		16.4%		5.6%	4.5%		3.1%				2.1%
- Cheese	9.6%			5%	3.%	1.6%	4.7%		0.7%			6.7%	1.1%
- Milk	18.5%	3.3%		31.6%	4.%	12.7%	12.1%		4.0%			16.7%	5.9%
- Yoghurt	13.9%	8.5%		18.6%	2.%	6.9.%	8.1%		0.7%				8.2%

Sources: FiBL-AMI survey 2019, based on data from Austria: RollAMA based on GfK, Belgium: LV based on GFK; Czech Republic: UZEI; Denmark: GfK ConsumerScan, provided by LF, Finland: Pro Luomu; France: Agence Bio (only supermarkets/general retailers). For baby food: Data from 2017, supermarket sales only; Germany: Agricultural Market Information Company AMI based on GfK; Netherlands: Bionext; Norway: Nielsen Norway; Sweden: Statistics Sweden (excludes alcoholic beverages); Switzerland: Bio Suisse based on Nielsen; UK: Soil Association. Note: Due to classifications and nomenclatures differing from country to country, it is not possible to supply data for all product groups, even if data for individual products may be available. Not all countries have data on the market shares of organic products. Please note that the products shown in the table above are a selection.

Organic fruit and vegetables continue to be highly popular purchases among European organic consumers. Organic vegetables have the highest market shares after eggs, representing 10 percent or more of the sales value of all vegetables sold in countries such as Switzerland, Austria, Denmark, and Sweden. For example, fresh carrots or fresh pumpkins alone have a nearly 30 percent market share in Germany.

In Sweden and Switzerland, organic dairy products are reaching organic market shares of 10 percent or higher. In Denmark, organic milk has an organic market share of 30 percent.

Individual products can reach even higher market shares. Organic oatmeal (over 52 percent in Denmark) or organic savoury bread spreads (59 percent in Germany) are good examples.

On the other hand, products like organic beverages (except wine) and meat (especially poultry), have low market shares in many countries. Often, these products are highly processed and very cheap on the conventional market. Another factor is that many organic consumers tend to eat little or no meat.

6.6 Marketing channels in organic agriculture

Some countries are in a position to break down their retail sales data by marketing channel. Some are even able to provide a breakdown by product and marketing channel. Some countries have data for catering sales, and some countries provide data for direct marketing and box schemes. Wherever possible, the figure for catering sales was deducted from the figure for the total organic market (Table 67).

Figure 91 shows that the importance of the various retail marketing channels (excluding food service/catering) differs from country to country. In the past, countries with strong involvement by general retailers showed steady organic market growth (e.g., Austria, Denmark, Sweden, Switzerland, and the United Kingdom). France and Italy are good examples of countries with strong market growth, where specialized retailers play a very important role, even though their importance is decreasing as shown in Figure 92.

In Germany, the market has entered into a transition period. Supermarkets have become the driving force in the market, whereas specialised retailers are facing more and more competition. While in 2014, 33 percent of all organic products were sold in organic food shops, this number decreased to 29 percent in 2017. In 2017, 60 percent of the organic food was sold by general retailers.

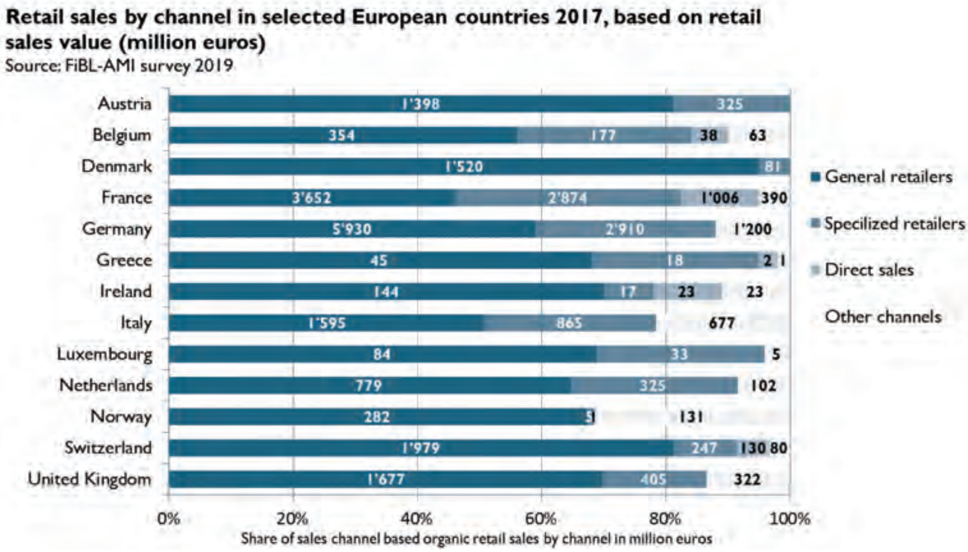

Figure 91: Europe: Marketing channels for organic products in selected countries 2017

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

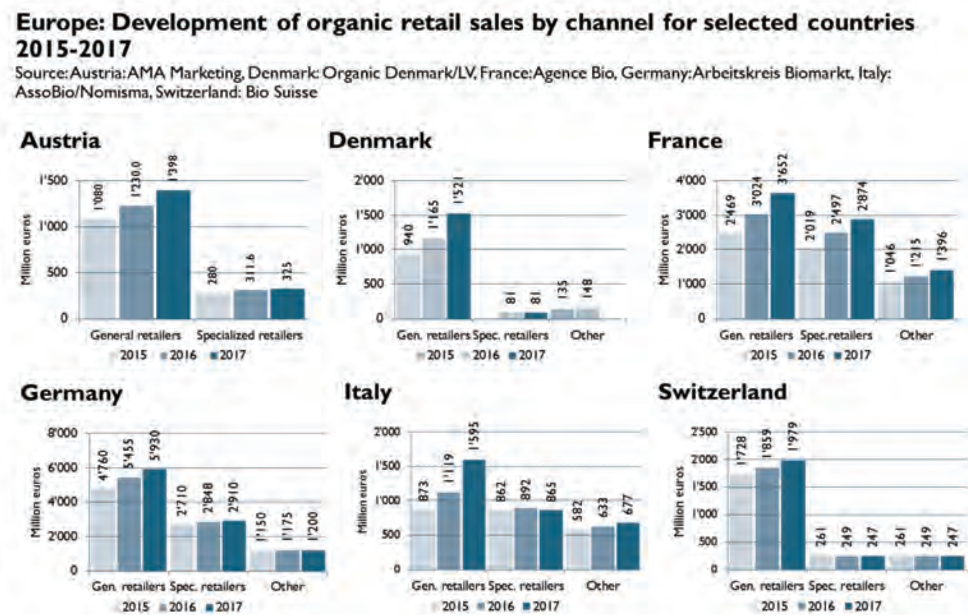

Figure 92: Europe: Growth of marketing channels for organic products 2015-2017 in selected countries

Source: Austria: AMA Marketing, Denmark: Organic Denmark/LV, France: Agence Bio, Germany: Arbeitskreis Biomarkt, Italy: AssoBio/Nomisma, Switzerland: Bio Suisse.

7 Conclusion

Currently, available data on organic farming in the global and European market show that, in an international context, the European organic sector is well developed. Relatively high shares of agricultural land, continual growth in the area and number of operators, as well as a fast-growing market, show the exceptional dynamics that the European organic market and sector has.

For many countries, the organic market is growing faster than production, and domestic supply cannot meet demand. Therefore, many organic organisations or market actors are calling for more farmers to convert to organic.

The data analysis shows that there are still large discrepancies among European countries. Even though organic agricultural land in some countries in Central and Eastern Europe account for large shares of the overall agricultural land, consumer spending, although growing, remains low as a proportion of total spending on food in these countries.

Another issue that needs to be addressed is data availability and quality. For instance, imports and exports play a very important role, but almost no relevant data exists. Denmark is the only European country that consistently supplies international trade data with a breakdown by country of origin/destination and product. In order to increase the transparency of the organic market, the availability of export and import values could play an important role. Currently, it is not possible to compare production data versus international trade data, which could give important hints on potential fraud cases.

Furthermore, while the availability of domestic market data is improving, it is collected with a wide range of methods and, strictly speaking, is not accurately comparable. Diverging methods and availability remain as challenges. For many countries, particularly in Central and Eastern Europe, retail sales data are not collected on a continual basis, and thus, little is known about the importance of organic product sales. Therefore, we recommend that data availability and accessibility are increased, that classifications, nomenclature, and definitions, in particular for organic market data, are harmonized, and that data quality is improved (Willer and Schaack 2014).

8 Acknowledgments

The data compiled for this article builds on the collection activities of the OrganicDataNetwork project, which was funded by the European Union (EU) under its seventh framework programme for research, demonstration, and technological development, which ended in 2014.[1] Under this project, for the first time, detailed

1 The project “Data network for better European organic market information” (OrganicDataNetwork) has received funding from the European Union’s Seventh Framework Programme for Research, Technological Development and Demonstration under grant agreement no 289376.

organic market data for all European countries was collected[1]. The authors would like to thank all of those who have provided data and information for this report, in particular, the partners of the OrganicDataNetwork project.

9 References and further reading

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Note on data collection

Data collection in Europe, like in the rest of the world, is carried out using multiple information sources. We would, however, like to point out that Eurostat, the statistical office of the European Union, is constantly expanding its data collection effort in the field of organic agriculture, and most of the data on organic areas, livestock, and operators was taken from Eurostat. The Eurostat organic farming statistics are available at

- ec.europa.eu/eurostat/web/agriculture > Database > Organic farming
- ec.europa.eu/eurostat/statistics-explained/index.php/Organic_farming_statistics

For market data, data from the private sector, market research companies, or statistical offices are used.

[1] The data was collected by the Research Institute of Organic Agriculture (FiBL), Switzerland, and the Agricultural Market Information Company (AMI), Germany, which are among the partners of the OrganicDataNetwork. In addition, further data sources were used.

Organic Agriculture in Europe: Tables

Table 61: Europe: Organic agricultural land by country 2017

Country	Organic area [ha]	Organic share [%]	Change 2016-17 [%]	Change 2008-17 [%]	Change 2016-17[ha]
Albania	549	0.05%	-17.1%	65.9%	-113
Andorra	2	0.01%	-50.0%		-2
Austria	620'764	24.0%	8.6%	16.7%	49'179
Belgium	83'510	6.4%	6.4%	133.8%	5'058
Bosnia & Herzegovina	1'273	0.1%	28.4%	84.2%	281
Bulgaria	136'629	2.9%	-14.9%	720.0%	-23'991
Channel Islands	180	1.9%	-	-58.1%	-
Croatia	96'618	6.1%	3.2%	865.2%	3'025
Cyprus	5'616	5.1%	1.2%	141.9%	66
Czech Republic	520'032	12.2%	6.4%	52.2%	31'441
Denmark	226'307	8.6%	12.3%	50.8%	24'831
Estonia	196'441	20.5%	8.6%	124.9%	15'589
Faroe Islands	253	8.4%	-	2010.0%	-
Finland	259'451	11.4%	8.9%	72.5%	21'211
France	1'744'420	6.3%	13.4%	198.8%	206'373
Germany	1'373'157	8.2%	9.7%	51.3%	121'837
Greece	410'140	5.0%	19.7%	29.0%	67'556
Hungary	199'684	4.3%	7.2%	62.6%	13'337
Iceland	20'177	1.1%	-11.2%	189.5%	-2'534
Ireland	74'336	1.5%	-3.1%	66.1%	-2'365
Italy	1'908'653	15.4%	6.3%	90.4%	112'290
Kosovo	160	0.04%	-	-	-
Latvia	268'870	14.8%	3.8%	66.4%	9'724
Liechtenstein	1'389	37.9%	0.4%	31.9%	6
Lithuania	234'134	8.1%	5.6%	91.6%	12'469
Luxembourg	5'444	4.2%	27.4%	54.0%	1'170
Macedonia, FYROM	2'900	0.2%	-10.6%	181.8%	-345
Malta	43	0.4%	80.7%	261.3%	19
Moldova	30'142	1.2%	-	157.7%	-
Montenegro	2'715	1.2%	-21.7%	44.7%	-755
Netherlands	56'203	3.0%	7.7%	11.4%	3'999
Norway	47'042	4.7%	-1.2%	-10.0%	-579
Poland	494'979	3.4%	-7.8%	57.7%	-41'600
Portugal	253'786	7.0%	3.6%	18.3%	8'734
Romania	258'471	2.0%	14.2%	84.4%	32'162
Russian Federation	656'933	0.3%	108.4%	1298.9%	341'778
Serbia	13'423	0.4%	-6.5%	198.7%	-935
Slovakia	189'148	10.0%	1.1%	34.4%	2'124
Slovenia	46'222	9.5%	6.1%	54.9%	2'643
Spain	2'082'173	8.9%	3.1%	84.3%	63'371
Sweden	576'845	18.8%	4.4%	71.5%	24'150
Switzerland	151'404	14.4%	6.6%	32.7%	9'331
Turkey	520'886	1.4%	-0.6%	376.2%	-2'891
Ukraine	289'000	0.7%	-24.2%	7.0%	-92'173
United Kingdom	497'742	2.9%	1.5%	-31.5%	7'537
Europe	**14'558'246**	**2.9%**	**7.6%**	**75.5%**	**1'023'011**
European Union	**12'819'818**	**7.2%**	**6.4%**	**67.0%**	**771'940**

Source*: FiBL-AMI survey 2019 based on Eurostat and national data sources. For data sources see annex.*

Table 62: Europe: Conversion status of organic agricultural land 2017

Country	Area [ha]	Fully converted [ha]	Conversion area [ha]
Albania	549		
Andorra	2	2	
Austria	620'764		
Belgium	83'510	69'914	13'596
Bosnia and Herzegovina	1'273	975	298
Bulgaria	136'629	48'463	88'166
Channel Islands	180	180	
Croatia	96'618	42'348	54'270
Cyprus	5'616	3'770	1'845
Czech Republic	520'032	472'798	47'235
Denmark	226'307	162'043	64'264
Estonia	196'441	160'837	35'604
Faroe Islands	253	253	
Finland	259'451	216'693	42'759
France	1'744'420	1'233'806	510'613
Germany	1'373'157		
Greece	410'140	280'733	129'407
Hungary	199'684	104'483	95'200
Iceland	20'177	20'137	39
Ireland	74'336	66'503	7'833
Italy	1'908'653	1'372'340	536'314
Kosovo	160	160	
Latvia	268'870	216'855	52'016
Liechtenstein	1'389	1'080	309
Lithuania	234'134	200'384	33'750
Luxembourg	5'444	4'240	1'204
Macedonia, FYROM	2'900	994	1'168
Malta	43	39	4
Moldova	30'142	21'395	8'747
Montenegro	2'715	1'721	994
Netherlands	56'203	50'203	6'000
Norway	47'042	43'681	3'361
Poland	494'979	383'246	111'733
Portugal	253'786	216'180	37'606
Romania	258'471	149'106	109'365
Russian Federation	656'933	388'051	52'348
Serbia	13'423	7'528	5'899
Slovakia	189'148	176'580	12'568
Slovenia	46'222	40'349	5'874
Spain	2'082'173	1'683'252	398'921
Sweden	576'845	495'488	81'357
Switzerland	151'404		
Turkey	520'886	360'140	160'746
Ukraine	289'000	201'000	88'000
United Kingdom	497'742	466'233	31'509
Europe	**14'558'246**	**9'364'184**	**2'830'922**
European Union	**12'819'818**	**8'316'886**	**2'509'013**

Source*: FiBL-AMI survey 2019 based on Eurostat and national data sources. For data sources see annex.*

Table 63: Europe: Land use in organic agriculture by country 2017

Country	Arable land crops [ha]	Permanent crops [ha]	Permanent grassland [ha]	Total [ha]
Albania	93	420		549
Andorra		2		2
Austria	227'987	10'246	382'320	620'764
Belgium	27'821	930	53'852	83'510
Bosnia and Herzegovina	410	116	28	1'273
Bulgaria	66'223	30'485	39'921	136'629
Channel Islands				180
Croatia	44'086	11'787	40'745	96'618
Cyprus	2'913	2'620	82	5'616
Czech Republic	65'490	5'735	424'090	520'032
Denmark	183'267	2'549	40'491	226'307
Estonia	100'814	2'383	88'026	196'441
Faroe Islands	1		252	253
Finland	212'462	542		259'451
France	948'001	117'440	678'981	1'744'420
Germany	548'257	18'093	760'000	1'373'157
Greece	150'176	59'301	200'663	410'140
Hungary	80'521	9'963	109'199	199'684
Iceland	12'748		6'191	20'177
Ireland	3'635	56	70'645	74'336
Italy	839'410	466'892	544'048	1'908'653
Kosovo	160			160
Latvia	136'495	2'411	129'964	268'870
Liechtenstein	233	7	1'149	1'389
Lithuania	149'801	5'780	78'553	234'134
Luxembourg	2'443	179	2'823	5'444
Macedonia, FYROM	1'656	506		2'900
Malta	24	20		43
Moldova	25'982	4'160		30'142
Montenegro	300	423	1'992	2'715
Netherlands	23'828	645	31'730	56'203
Norway	37'927	315	8'800	47'042
Poland	351'192	27'473	116'314	494'979
Portugal	52'103	54'360	147'323	253'786
Romania	194'621	13'166	50'685	258'471
Russian Federation	598'120	104	6'320	656'933
Serbia	7'535	4'033	1'548	13'423
Slovakia	62'977	1'941	124'230	189'148
Slovenia	5'942	2'673	37'607	46'222
Spain	468'370	528'504	1'085'338	2'082'173
Sweden	449'377	599	126'869	576'845
Switzerland	32'797	2'152	113'788	151'404
Turkey	343'069	208'310	16'558	520'886
Ukraine	235'290	5'000	34'680	289'000
United Kingdom	150'037	4'048	333'439	497'742
Europe	**6'844'595**	**1'606'370**	**5'889'242**	**14'558'246**
European Union	**5'548'273**	**1'380'821**	**5'697'937**	**12'819'818**

Source: FiBL-AMI survey 2019 based on Eurostat and national data sources. For data sources see annex. Total includes other agricultural areas for which no land use details were available.

Table 64: Europe: Organic agricultural land and wild collection areas by country 2017

Country	Agricultural land [ha]	Wild collection [ha]	Total [ha]
Albania	549	682'696	683'245
Andorra	2		2
Austria	620'764		620'764
Belgium	83'510	3	83'512
Bosnia and Herzegovina	1'273	150'604	151'877
Bulgaria	136'629	307'020	443'649
Channel Islands	180		180
Croatia	96'618	7	96'625
Cyprus	5'616		5'616
Czech Republic	520'032		520'032
Denmark	226'307	2'648	228'955
Estonia	196'441	260'662	457'103
Faroe Islands	253		253
Finland	259'451	11'631'680	11'891'131
France	1'744'420		1'744'420
Germany	1'373'157		1'373'157
Greece	410'140	317'053	727'193
Hungary	199'684		199'684
Iceland	20'177	200'043	220'219
Ireland	74'336		74'336
Italy	1'908'653	259'878	2'168'531
Kosovo	160	179'580	179'740
Latvia	268'870		268'870
Liechtenstein	1'389		1'389
Lithuania	234'134		234'134
Luxembourg	5'444		5'444
Macedonia, FYROM	2'900	1'164'190	1'167'090
Malta	43		43
Moldova	30'142	424	30'566
Montenegro	2'715	143'410	146'125
Netherlands	56'203		56'203
Norway	47'042		47'042
Poland	494'979		494'979
Portugal	253'786	40'000	293'786
Romania	258'471	1'787'548	2'046'019
Russian Federation	656'933	30'991	687'924
Serbia	13'423	1'550	14'973
Slovakia	189'148		189'148
Slovenia	46'222	13'238	59'460
Spain	2'082'173	38'184	2'120'357
Sweden	576'845		576'845
Switzerland	151'404		151'404
Turkey	520'886	189'251	710'137
Ukraine	289'000	570'000	859'000
United Kingdom	497'742		497'742
Europe	**14'558'246**	**17'970'660**	**32'528'906**
European Union	**12'819'818**	**14'657'921**	**27'477'740**

Source: FiBL-AMI survey 2019 based on Eurostat and national data sources. For data sources see annex.

Table 65: Europe: Organic livestock by country 2017

	Bovine animals		Sheep		Pigs		Poultry	
	No	Share (%)	No	Share (%)	No	Share (%)	No	Share (%)
Austria	401'484	20.3%	119'744	33.2%	67'247	2.2%	2'093'700	12.3%
Belgium	108'016	4.3%	25'026	21.0%	17'771	0.3%	3'305'490	9.2%
Bulgaria	10'400	1.9%	25'959	1.8%	276	-	3'122	-
Croatia	17'226	3.8%	54'583	8.0%	1'468	0.1%	2'174	-
Cyprus	506	0.9%	791	0.2%		-	19'627	0.6%
Czech Republic	255'978	18.9%	98'559	44.6%	2'101	0.1%	43'845	0.2%
Denmark	199'870	12.4%	10'861	7.1%	374'963	3.0%	3'856'284	26.3%
Estonia	40'049	16.3%	34'441	44.8%	571	0.2%	28'797	1.3%
Faroe Islands		-	164	0.2%		-	8	-
Finland	66'838	7.3%	24'439	18.8%	5'074	0.4%	257'880	4.1%
France	649'856	3.4%	602'124	8.1%	121'036	0.9%	16'392'950*	7.6%
Germany	700'356	-	194'241	14.2%	155'800	0.8%	8'778'000	6.7%
Greece	75'132	11.0%	935'267	9.8%	4'434	0.4%	244'914	0.7%
Hungary	17'741	2.5%	6'260	0.6%	5'333	0.2%	106'292	0.3%
Iceland	249	0.3%	1'281	0.3%		-	12'513	3.9%
Ireland	52'390	0.8%	75'015	1.5%	579	-	150'890	0.9%
Italy	336'278	5.4%	736'502	9.3%	61'242	0.7%	2'903'532	1.8%
Latvia	95'585	25.1%	39'882	49.9%	2'571	0.7%	34'131	0.8%
Liechtenstein	1'525	24.3%	1'252	32.9%	71	4.1%	1'787	-
Lithuania	57'270	7.6%	26'840	44.4%	112	-	13'459	0.2%
Luxembourg	4'177	2.2%	476	5.8%	860	1.0%	30'365	26.9%
Macedonia, FYROM	4'401	1.8%	70'170	9.6%		-	80	-
Moldova	320	0.2%	1'115	0.2%		-		-
Montenegro	218	0.3%	1'426	0.7%		-	390	0.1%
Netherlands	65'189	1.7%	13'321	1.3%	64'299	0.5%	3'306'422	3.4%
Norway	29'931	3.5%	49'237	2.2%	3'474	0.4%	495'820	10.6%
Poland	27'901	0.5%	19'595	7.3%	3'893	-	291'716	0.2%
Portugal	76'468	5.1%	99'332	4.7%	213	-	48'160	0.1%
Romania	19'339	1.0%	55'483	0.7%	20	-	61'520	0.1%
Serbia	2'474	0.3%	4'665	0.3%	87	-	4'415	-
Slovakia	55'906	12.1%	98'729	25.1%	158	-	4'092	-
Slovenia	35'095	7.6%	36'981	30.8%	3'793	1.1%	104'940	4.6%
Spain	207'121	3.6%	590'900	3.6%	9'938	-	830'100	0.6%
Sweden	307'120	20.5%	126'724	20.8%	30'766	2.3%	1'412'488	16.8%
Switzerland	186'831	12.1%	82'333	24.0%	33'984	2.4%	982'748	8.5%
Turkey	6'632	0.1%	10'900	-		-	1'262'307	0.5%
United Kingdom	276'620	2.8%	889'538	2.8%	26'694	0.6%	3'060'087	2.0%
Europe	**4'398'530**	**3.5%**	**5'187'715**	**3.4%**	**998'828**	**0.6%**	**50'145'275**	**2.0%**
European Union	**4'159'911**	**5.2%**	**4'941'613**	**5.0%**	**961'212**	**0.7%**	**47'384'977**	**3.3%**

Source: FiBL-AMI survey 2019 based on Eurostat and national data sources. For data sources see annex.
** France: Numbers based on animal slaughtered and not on average stock and hence not comparable to the data from other countries.*
Notice In the case of pigs and poultry, in the official statistics, no clear distinction is made between the number of animals slaughtered and the places or average numbers of stock over the years, and it is not always clear which of these is given when "livestock numbers" are quoted. Adding up the data for pigs and poultry over all countries, therefore, is not completely reliable and country data are not necessarily comparable. The data that are presented here should, therefore, be treated with caution and are only an approximation of the overall picture.

Table 66: Europe: Organic producers, processors, and importers by country 2017

Country	Producers	Processors	Importers	Exporters
Albania	61	53	4	36
Andorra		3		
Austria	24'998	1'650	66	14
Belgium	2'105	1'227	235	108
Bosnia and Herzegovina	304	31		15
Bulgaria	6'471	181	29	6
Croatia	4'023	357	23	1
Cyprus	1'175	64	15	2
Czech Republic	5'275	655	250	141
Denmark	3'637	1'018	78	80
Estonia	1'888	169	33	10
Faroe Islands	1	1		
Finland	4'665	360	59	15
France	36'691	14'859	418	
Germany	29'764	15'019	1'687	1'242
Greece	20'197	1'586	30	69
Hungary	3'642	492	36	
Iceland	33	32	2	2
Ireland	1'725	277	24	2
Italy	66'773	18'092	411	518
Kosovo	100	5		2
Latvia	4'178	51	10	
Liechtenstein	45			
Lithuania	2'478	86	12	
Luxembourg	103	89	6	
Macedonia, FYROM	650	119	6	7
Malta	13	5	12	
Moldova	114	2	1	72
Monaco		2		
Montenegro	616	3		
Netherlands	1'696	995	385	87
Norway	2'070	407	84	0
Poland	20'257	795	161	216
Portugal	4'674	760	22	1
Romania	7'908	161	9	6
Russian Federation	89	69		28
San Marino		2		
Serbia	6'022	51	39	1
Slovakia	439	85	22	1
Slovenia	3'627	375	18	
Spain	37'712	4'297	263	137
Sweden	5'801	1'328	89	10
Switzerland	6'638	1'289	548	18
Turkey	75'067	1'142	44	69
Ukraine	304			
United Kingdom	3'479	3'131	182	
Europe	**397'509**	**71'375**	**5'314**	**2'916**
European Union	**305'903**	**68'243**	**4'587**	**2'766**

Source: FiBL-AMI survey 2019 based on Eurostat and national data sources. For data sources see annex.
**Total number includes data for countries with less than three operators.*

Table 67: Europe: The organic food market 2017

Country	Data year	Retail sales [Million €]	€/person [€]	Organic share [%]	One year growth [%]	Food service [Million €]	Exports [Million €]
Austria	2011						80
	2017	1'723	196	8.6	11.8	109	
Belgium	2017	632	56	2.5	5.0		
Bosnia and Herzegovina	2017	0.4	0.1				4
Bulgaria	2017	29	4		6.5		
Croatia	2011						3
	2014	99	24	2.2			
Cyprus	2006	2	2				
Czech Republic	2016	94	9	0.9		3	61
Denmark	2016						329
	2017	1'601	278	13.3	15.0	275	397
Estonia	2017	42	32	2.6		10	27
Finland	2014						10
	2017	309	56	2.3	13.2		
France	2017	7'921	118	4.4	18.0	452	707
Germany	2009					300	
	2017	10'040	122	5.1	5.9		
Greece	2017	66	6				
Hungary	2009						20
	2015	30	3				
Ireland	2011			0.7			
	2017	206	43		10.5		
Italy	2017	3'137	52	3.2	8.0	415	2'060
Kosovo	2015						6
Latvia	2017	51	6	1.5			51
Liechtenstein	2016	6	171		15.3		
Lithuania	2017	51	18	1.0		5	45
Luxembourg	2016		203				
	2017	122		7.3	13.6	6	
Moldova	2011						15
Montenegro	2010	0.1	0.2				
Netherlands	2016						1'200
	2017	1'206	71	4.5	2.9	305	
Norway	2016			1.7			
	2017	419	80		6.6	28	
Poland	2017	235	6				
Portugal	2011	21	2	0.2			
Romania	2011						200
	2016	41	2				
Russian Federation	2009						4
	2012	120	1				
Serbia	2016						19
Slovakia	2010	4	1	0.2			
Slovenia	2009					0.1	0.1
	2013	49	27	1.8			
Spain	2016						891
	2017	1'903	42	2.8	16.4	59	
Sweden	2016						84
	2017	2'366	237	9.1	9.3	529	
Switzerland	2017	2'435	288	9.0	8.1		
Turkey	2014	46	1				
	2017						182
Ukraine	2017	29	1		38.7		99
United Kingdom	2016						194
	2017	2'307	35	1.5	6.0	96	
Europe		**37'341**	**47**				
European Union		**34'285**	**67**				

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

Note on table: Where no published data exists, best estimates from experts have been used, but new data were not available for all countries. Therefore, in some cases earlier estimates are shown. Values published in national currencies were converted to euros using the 2017 average annual exchange rates according to the Central European bank. Please note that due to fluctuating exchange rates it is not possible to make a year-to-year comparison for countries that do not have the Euro as their currency.