



The Organic Market in Europe

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Trends & highlights 2018/2019

- In 2018, market and production data grew more or less at the same pace
- The European market surpassed the 40 billion euro mark
- General retailers continues to gain ground
- Data on organic imports to the European Union are available for the first time and show that tropical fruit and feedstuffs play a key role

Agripolicy level

- Work on the new EU regulation on organic farming will continue
- Work on the common agricultural policy is in progress

The World of Organic Agriculture 2020

www.organic-world.net

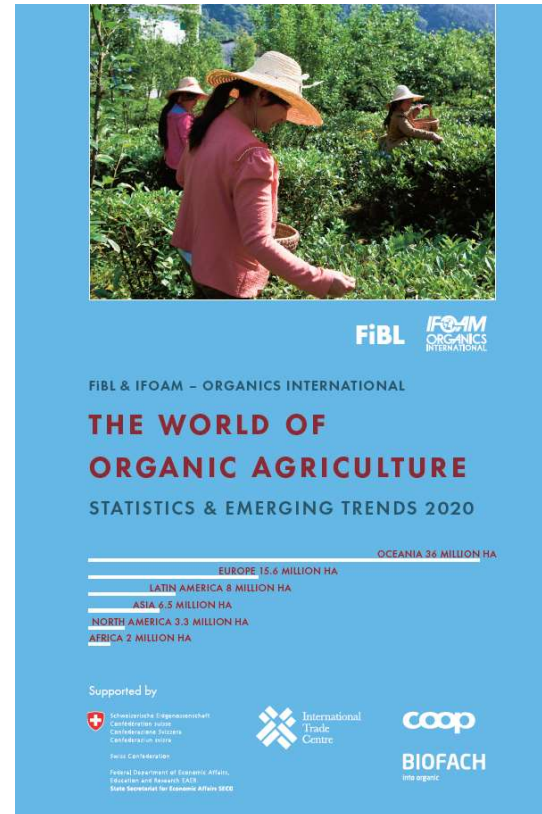
- The 21st edition of 'The World of Organic Agriculture', was published by FiBL and IFOAM – Organics International in February 2020.
- Data tables
- Country and continent reports
- Markets, standards, policy support

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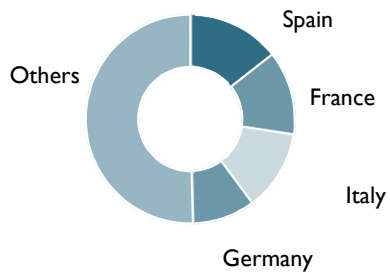
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EUROPE: ORGANIC FARMLAND 2018



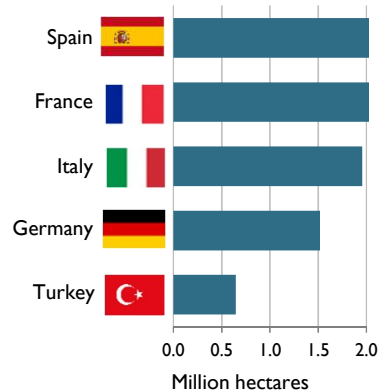
Half of Europe's organic farmland is in 4 countries.



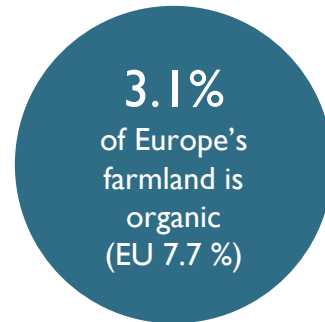
Distribution of organic agricultural land by country 2018



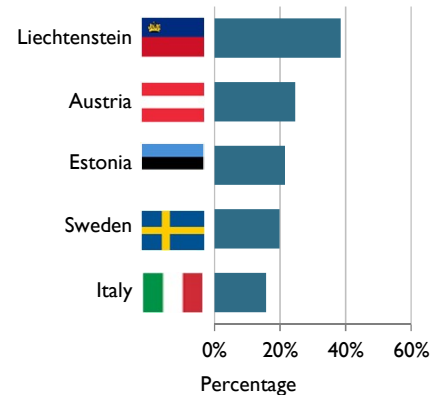
The country with the largest area of organic farmland is in Spain, followed by France and Italy.



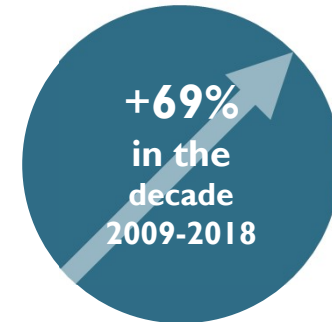
Top 5 countries with the largest areas of organic agricultural land 2018



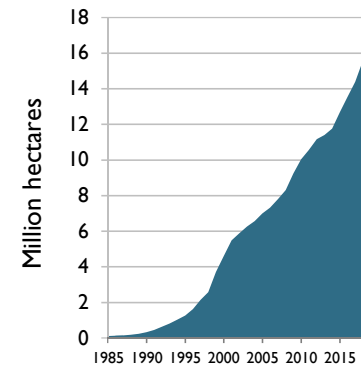
Ten countries have 10% or more of their agricultural land under organic management.



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



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

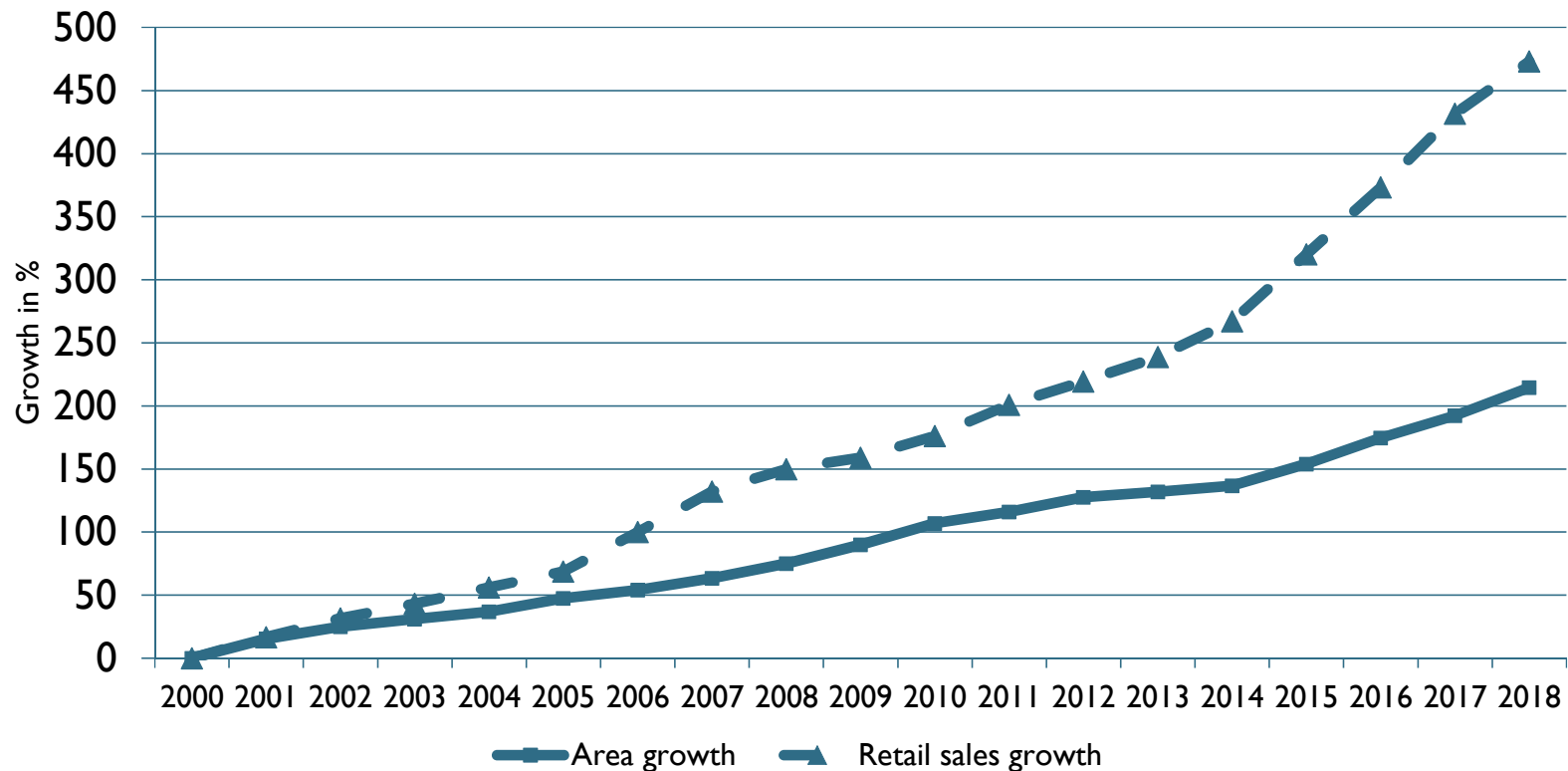


Growth of the organic agricultural land 1985–2018

Europe: growth of organic area and retail sales 2000-2018

Europe: growth of organic area and retail sales 2000-2018

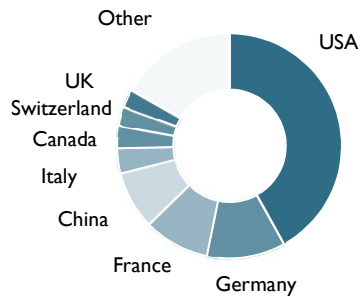
Source: FiBL-AMI survey 2020, based on national data sources and Eurostat



EUROPE: ORGANIC RETAIL SALES 2018



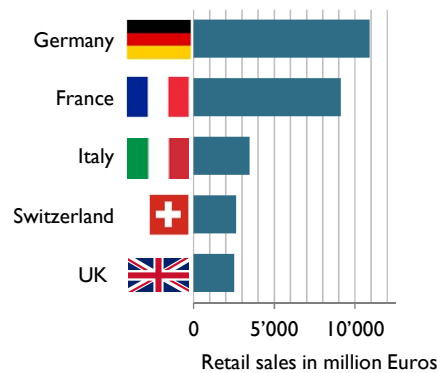
The European Union (37.4 billion €) is the second largest single market after the US (40.6 billion €) and China. By region, North America has the lead (43 billion €), followed by Europe and Asia.



Distribution of retail sales value worldwide by Country 2018



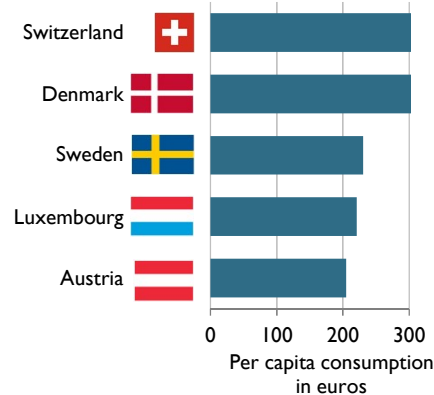
The European countries with the largest markets for organic food are Germany, France (9.1 billion €), Italy (3.5 billion €), and Switzerland (2.7 billion €).



The countries with the largest markets for organic food 2018



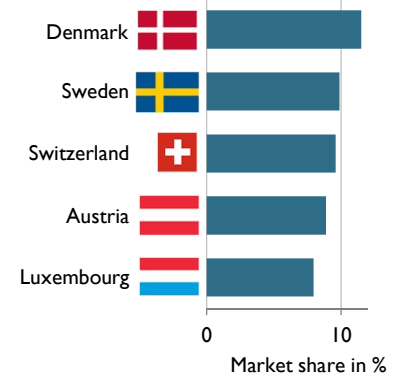
Denmark and Switzerland have the highest per capita consumption worldwide, followed by Sweden, Luxembourg and Austria.



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



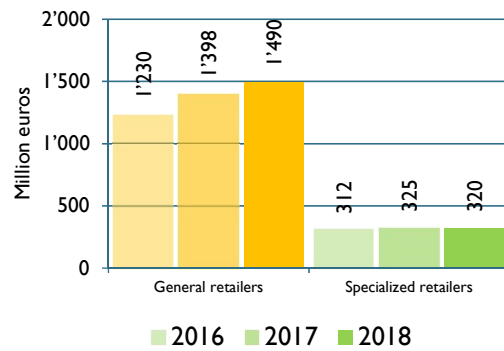
The country with the highest organic share of their total market is in Denmark, followed by Sweden, Switzerland, Austria, and Luxembourg.



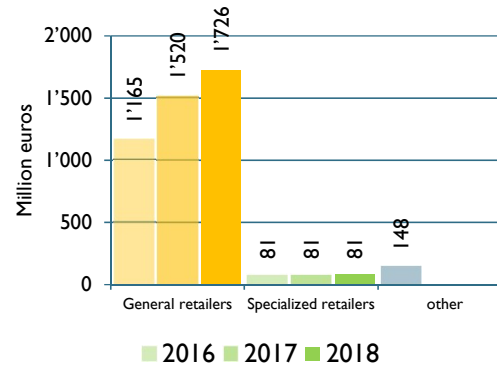
The countries with the highest organic shares of the total market 2018

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

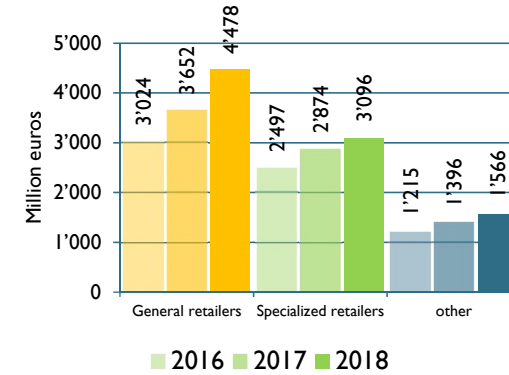
Austria



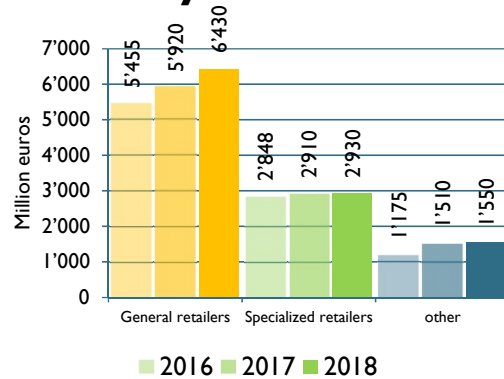
Denmark



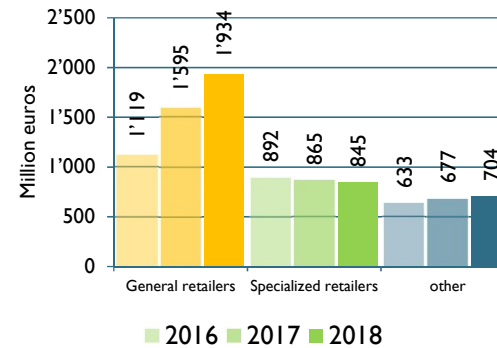
France



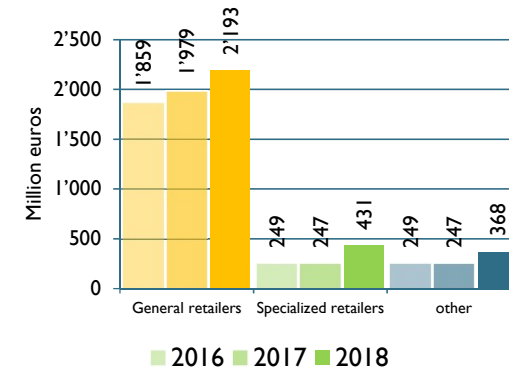
Germany



Italy

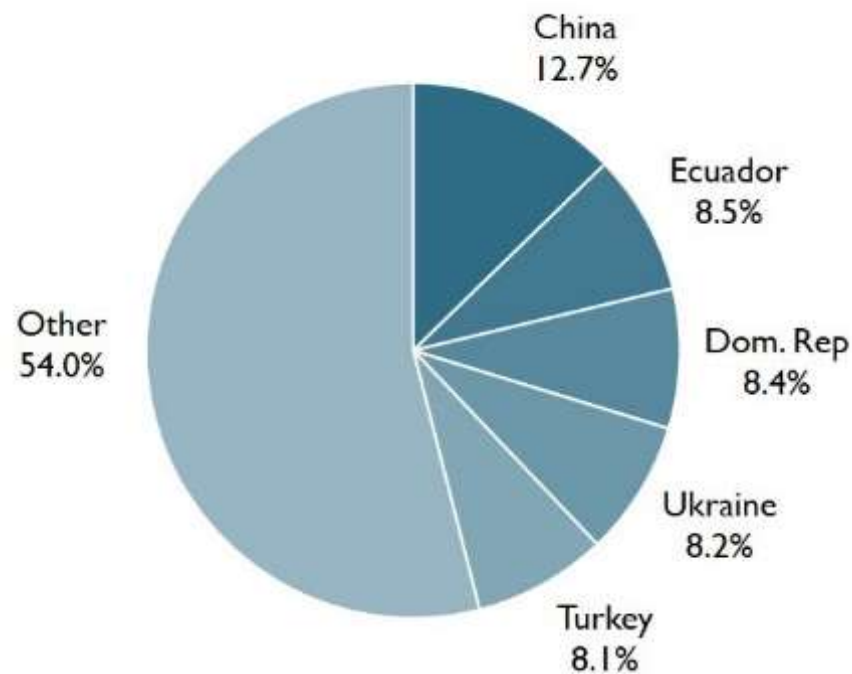
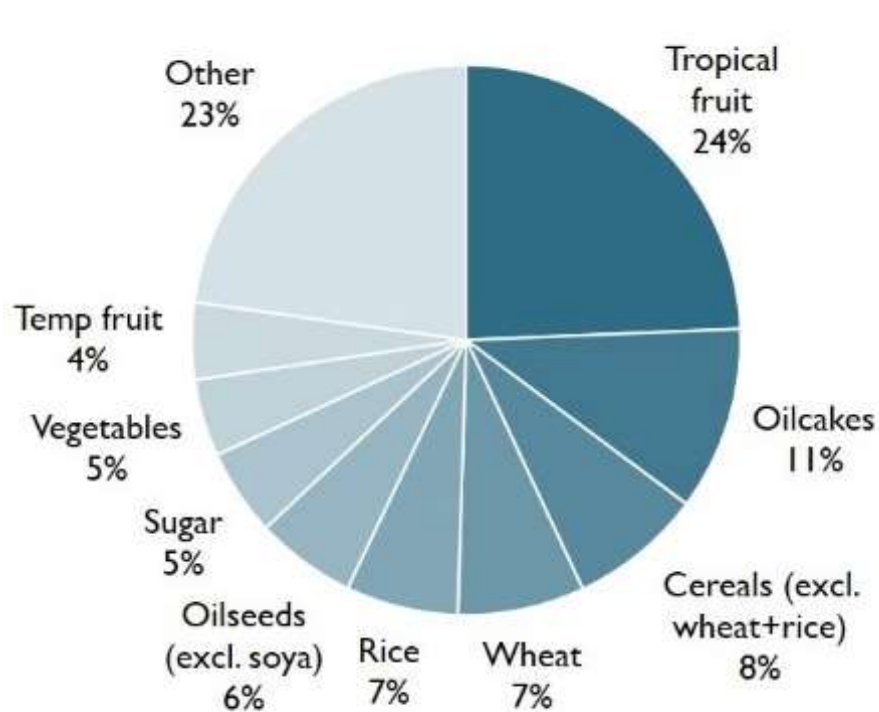


Switzerland



Imports to the European Union by country and by crop group 2018; total: 3.3 million tons

Source: TRACES/European Commission



Conclusions

The organic area and market continues to grow at a solid pace in Europe and worldwide.

Currently production is growing faster than in the past, thus the potential is there to meet the demand of the market better and decrease dependency on imports.

Imports play an increasingly important role for many European countries.

In some countries, the organic market shares have reached around 10 percent or even more; for individual products they can be even higher.

In most countries, general retailers are the most important and fastest growing marketing channel, however, food service is gaining in importance.

More and better data, better data access, access to visual data and linking data is needed for policy makers, market actors and researchers.

Organic farming statistics have a potential role to play when it comes to fraud detection – DG Agri's new import data are an important step forward!

Organic Agriculture in Europe 2018

Organic Farmland 2018

Top 3 countries (largest organic area)

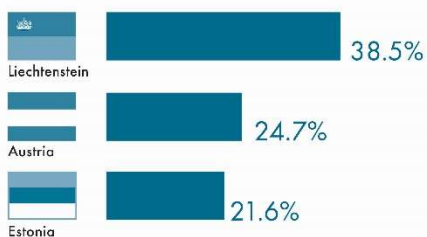


15.6 m ha Organic farmland in million hectares

+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

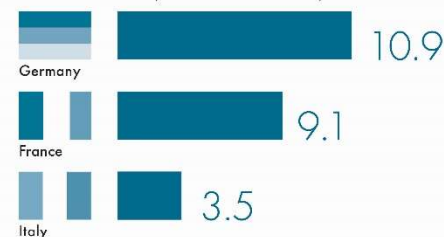
50.5 €

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

Source: FiBL survey based on national sources
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More information: www.organic-world.net - statistics@fiol.org

Organic Agriculture in the European Union 2018

Organic Farmland 2018

Top 3 countries (largest organic area)

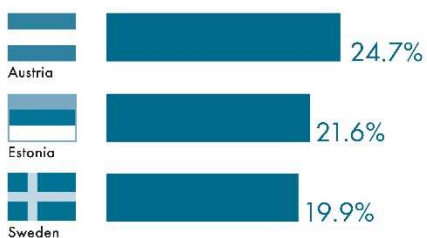


13.8 m ha Organic farmland in million hectares

+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

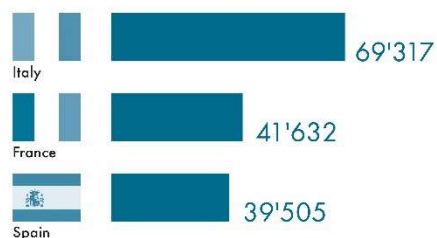
71'960

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

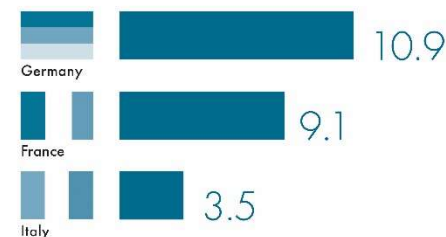
76 €

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

Source: FiBL survey based on national sources
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