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Organic Agriculture in Europe: Current Statistics

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The Global Market for Organic Food

BioFACH Congress eSPECIAL, February 18, 2 PM

The World of Organic Agriculture 2021
www.organic-world.net

- The 22nd edition of ‚The World of Organic Agriculture‘, was published by FiBL and IFOAM – Organics International in February 2021.
- Data tables and graphs
- Country and continent reports
- Markets, standards, policy support

- www.organic-world.net

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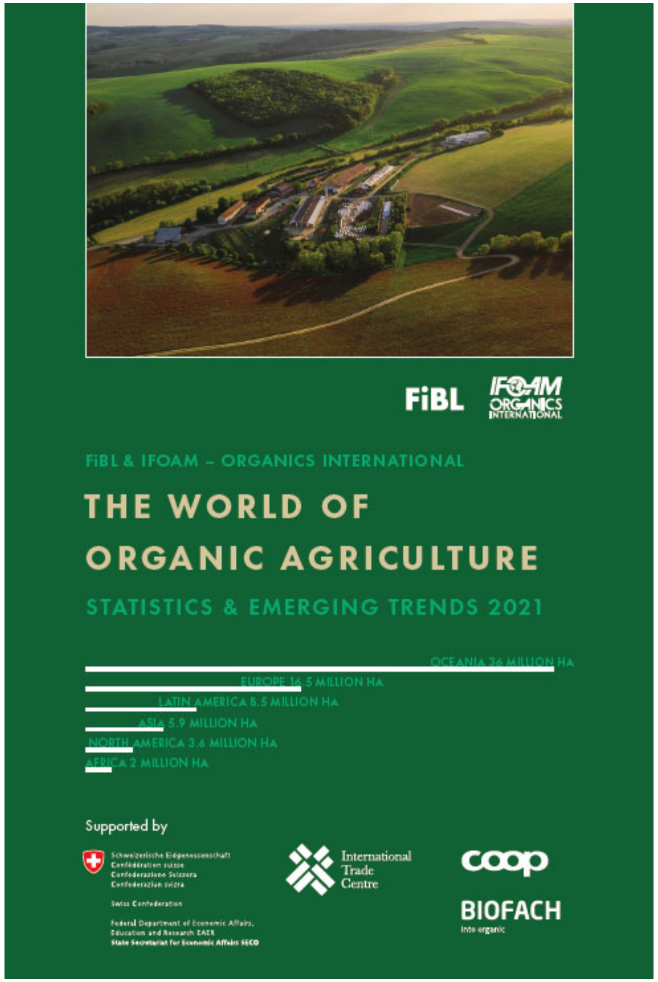


Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

IFOAM ORGANICS INTERNATIONAL

International Trade Centre

coop

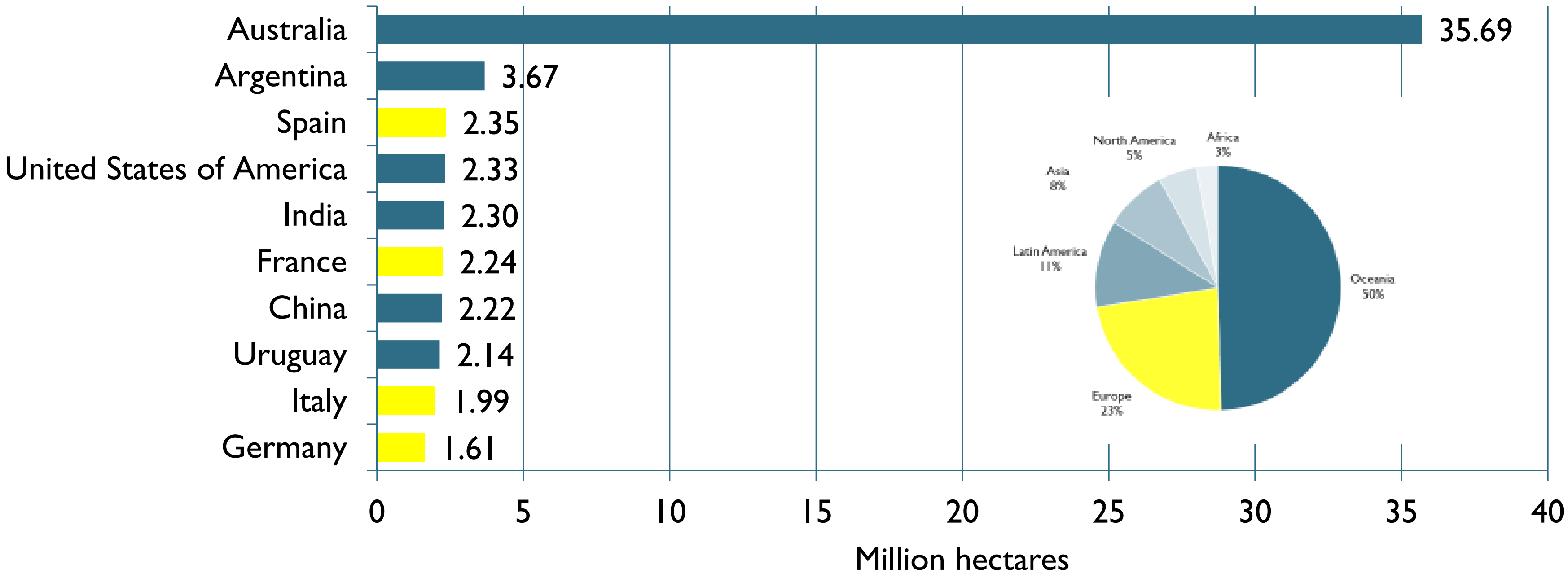
BIOFACH
into organic

Another record year for organic in Europe and the European Union – Key indicators 2019

- Organic farmland: **16.5 million hectares** (European Union 14.6 million hectares)
- Organic farmland growth: **6 percent**
- Organic farmland share: **3.3 percent** (European Union 8.1 percent)
- Organic retail sales: **45 billion euros** (European Union: 41.4 billion euros)
- Organic retail sales growth: **8 percent**

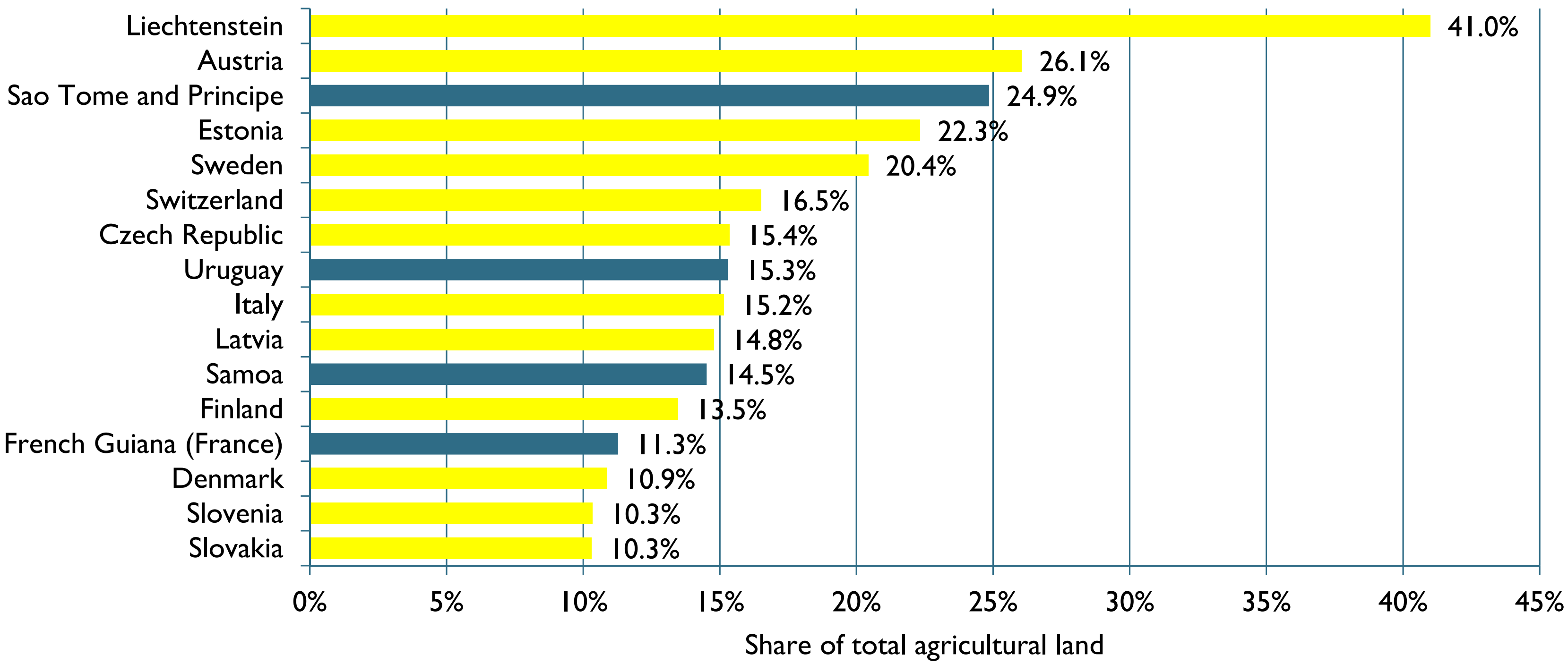
The ten countries with the most organic agricultural land 2019

The ten countries with the largest areas of organic agricultural land 2019
Source: FiBL survey 2021



The countries with the highest shares of organic farmland shares

The countries with an organic share of at least 10 percent of the agricultural land 2019
Source: FiBL survey 2021



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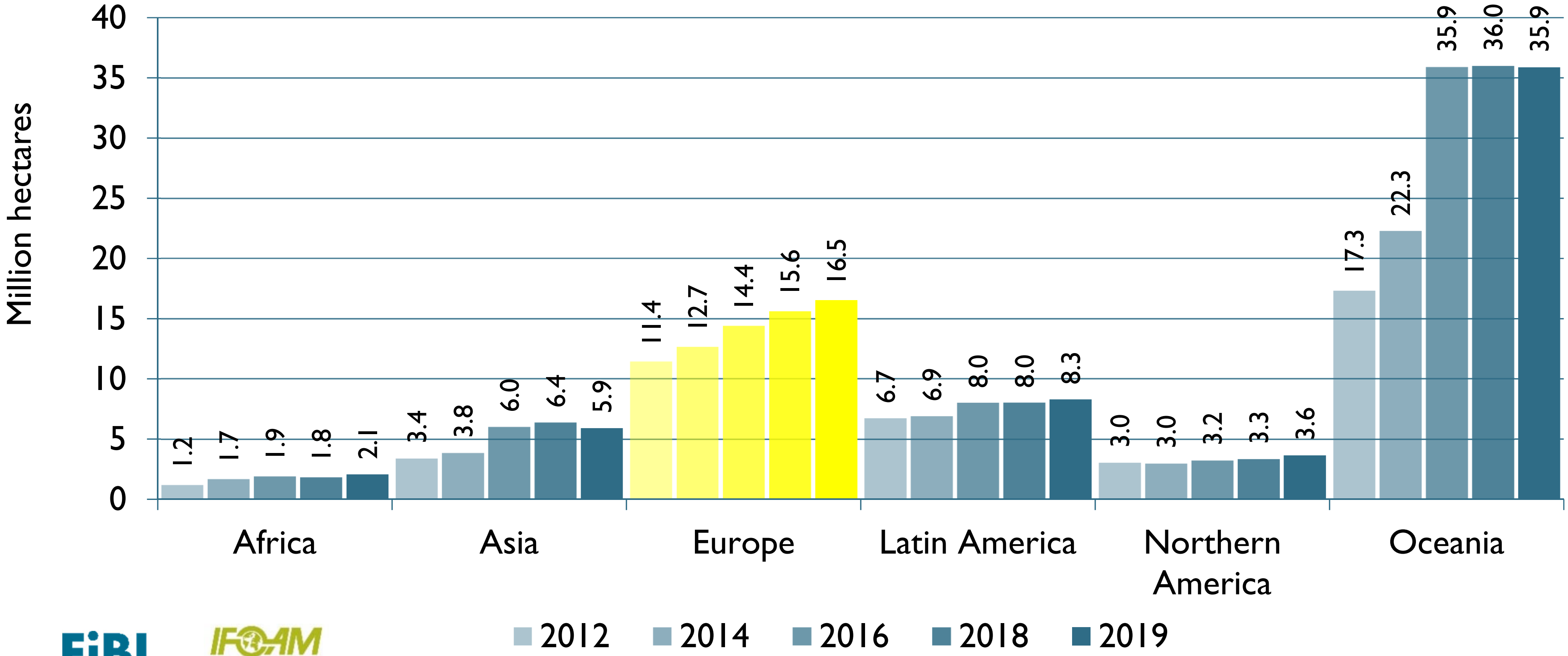
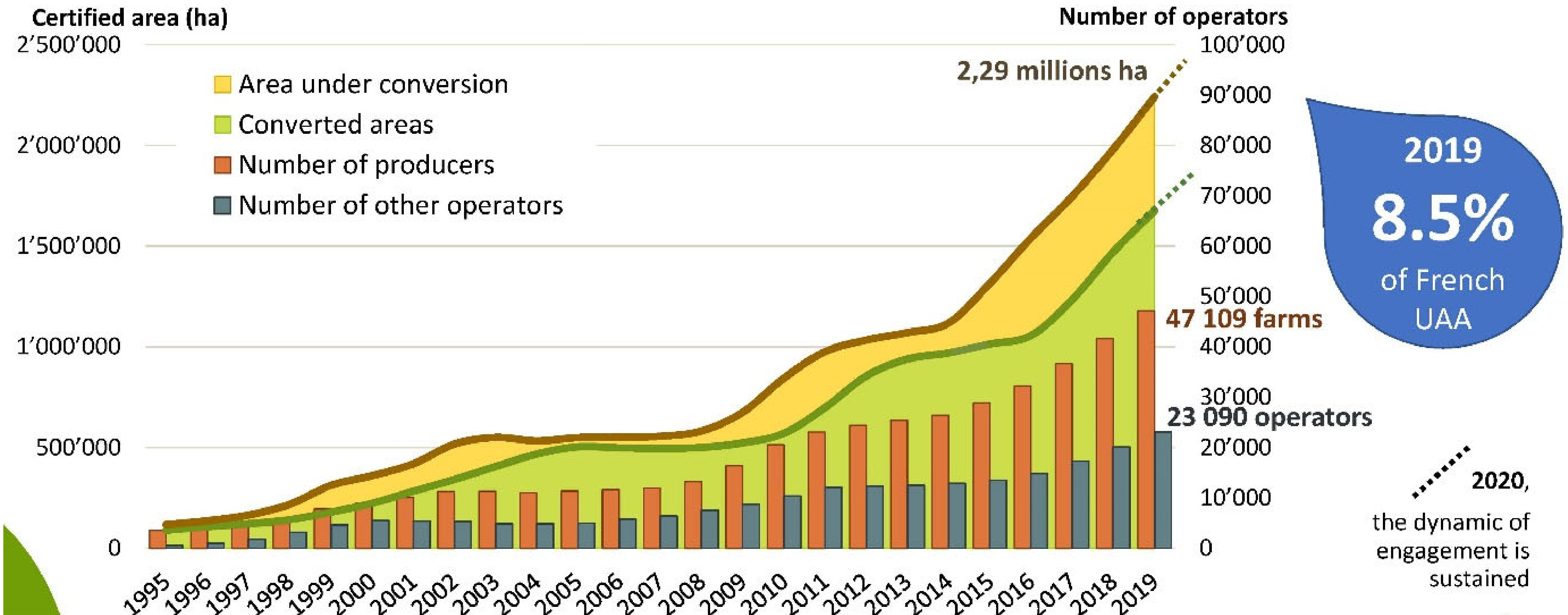
Growth of the organic agricultural land by continent 2012-2019

Source: FiBL-IFOAM survey 2012-2021



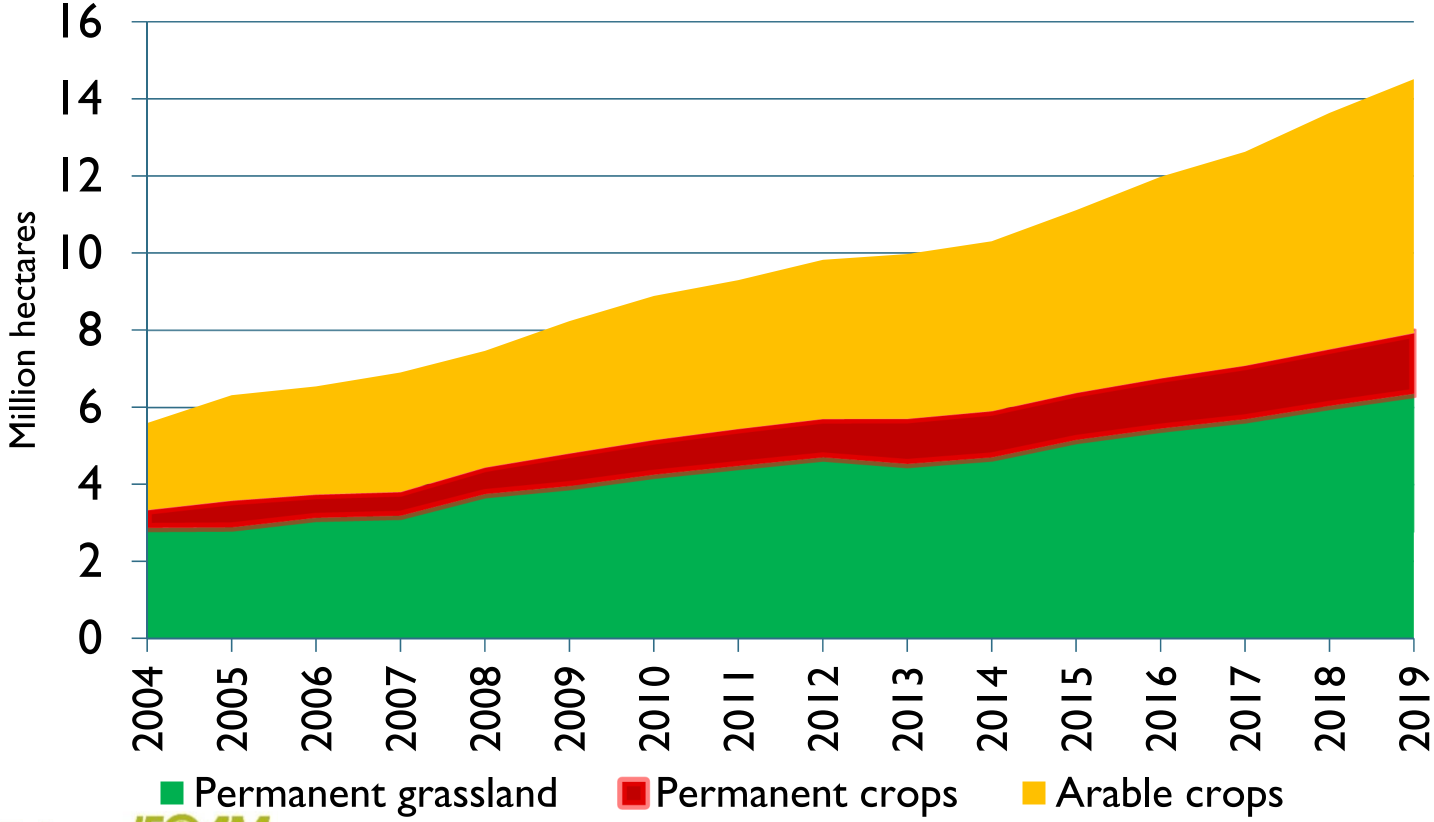
Evolution of the French organic production

source : Agence BIO/ Control bodies 2020



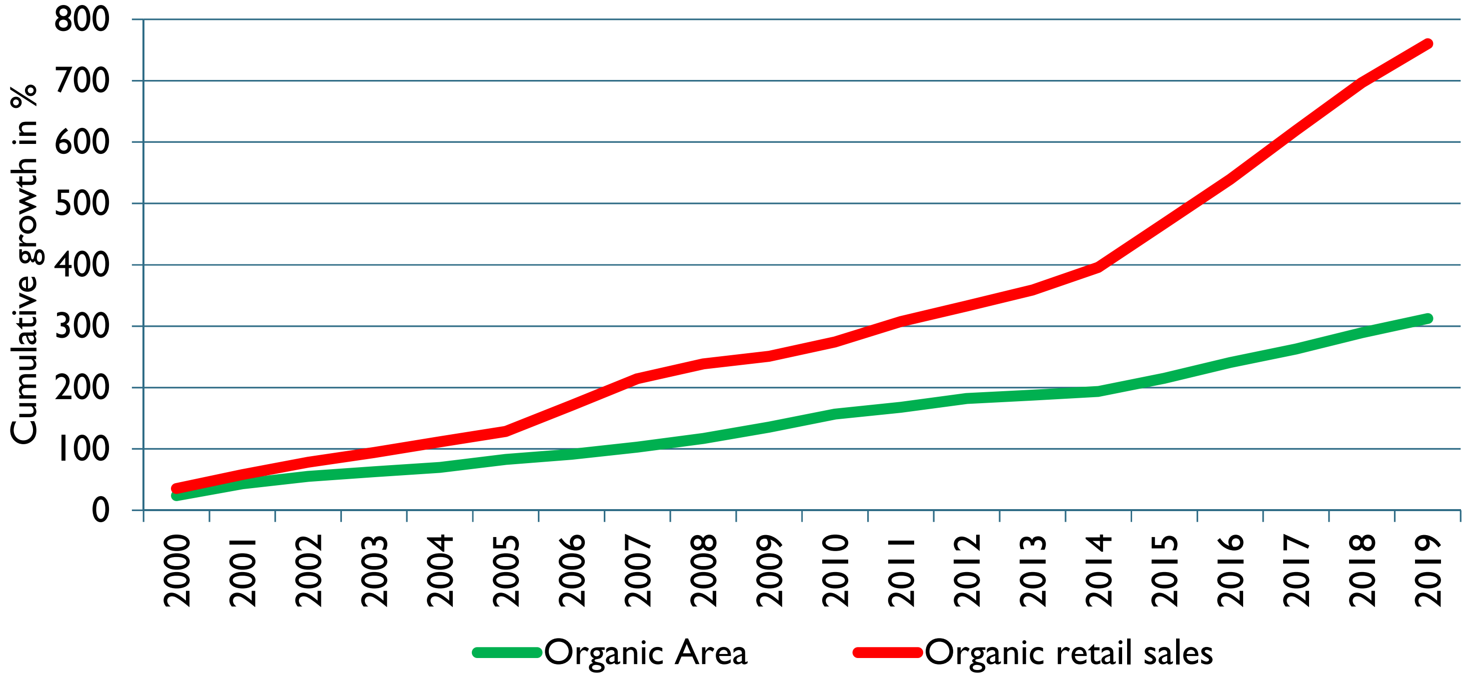
EU: Land use 2004-2019

European Union: Growth area by land use type 2004-2019
Source: FiBL-AMI surveys 2006-2021



EU: Growth of organic area and retail sales

EU: Growth of organic area and retail sales
2000-2019
Source: FiBL-AMI surveys 2009-2021



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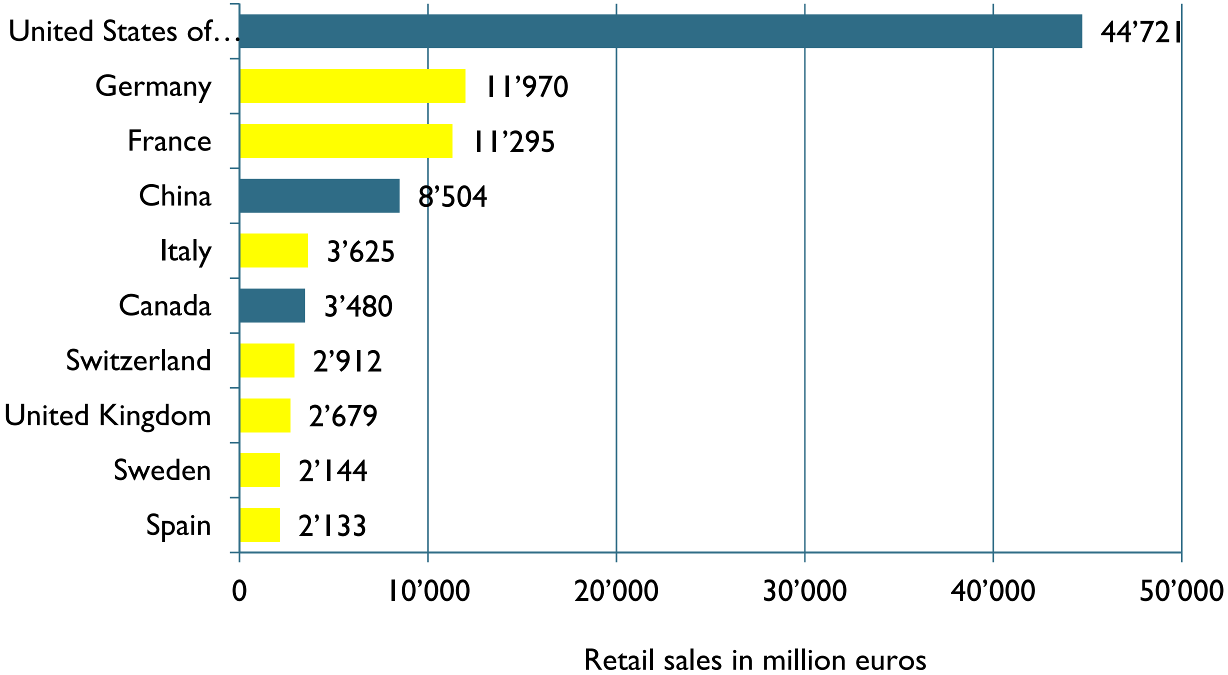
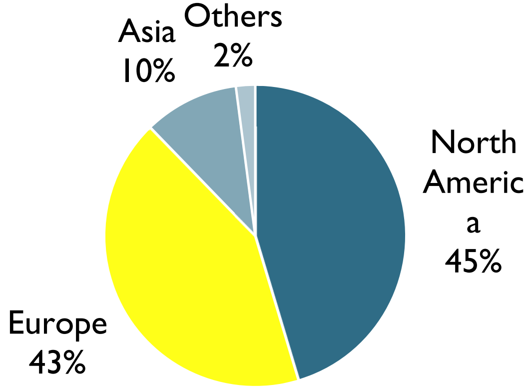
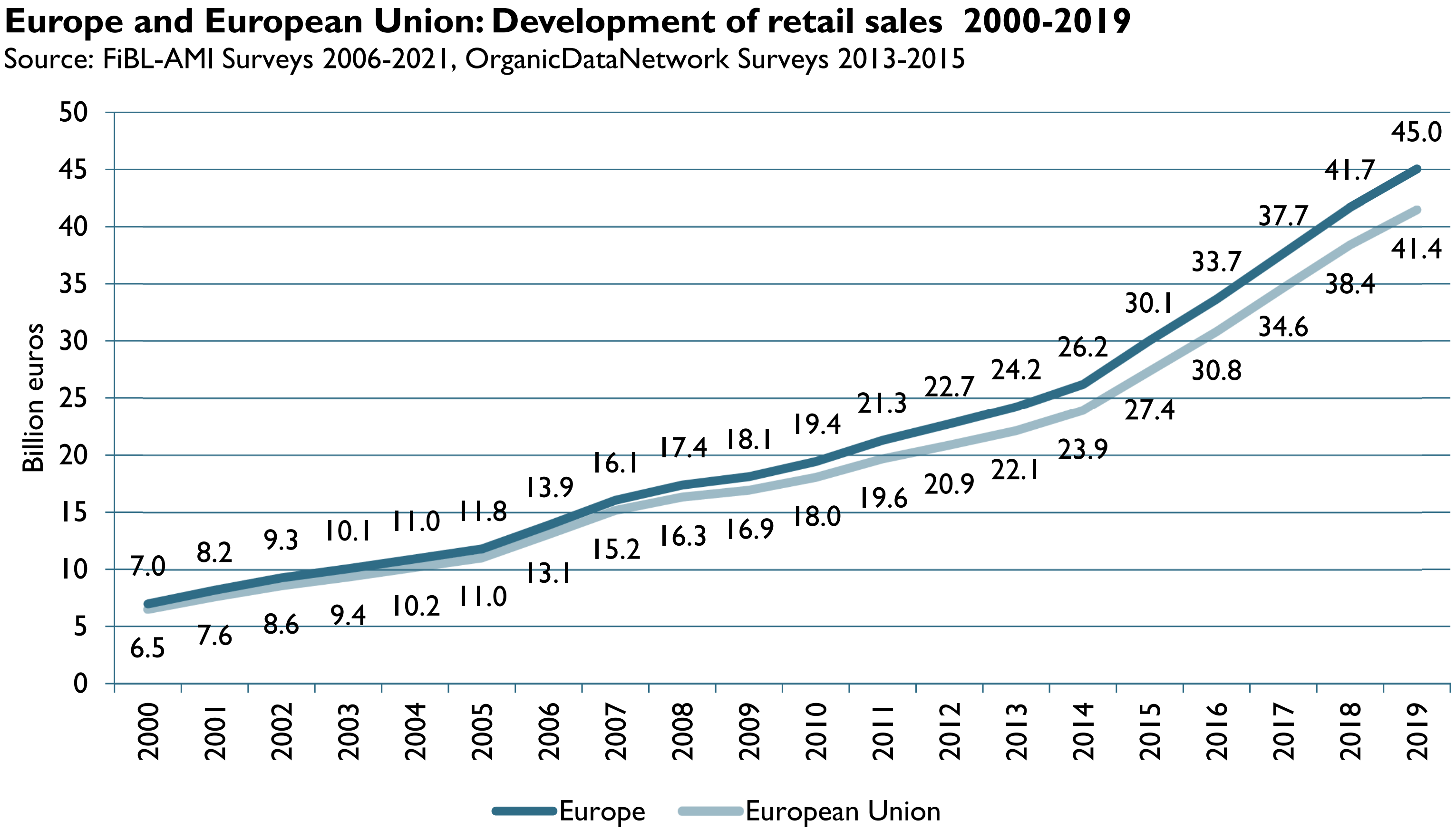
The biggest organic markets worldwide (Yellow: Europe)

The ten countries with the largest markets for organic food 2019
Source: FiBL-AMI survey 2021



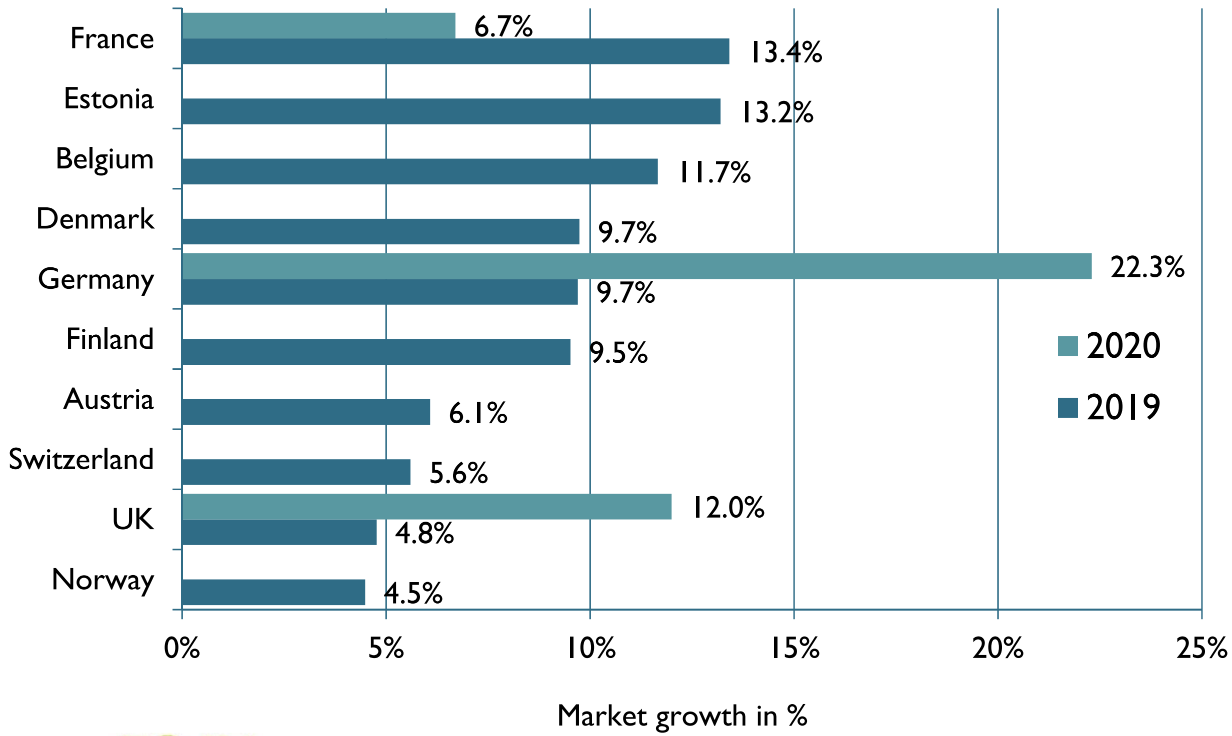


Europe and European Union: Development of retail sales 2000-2019

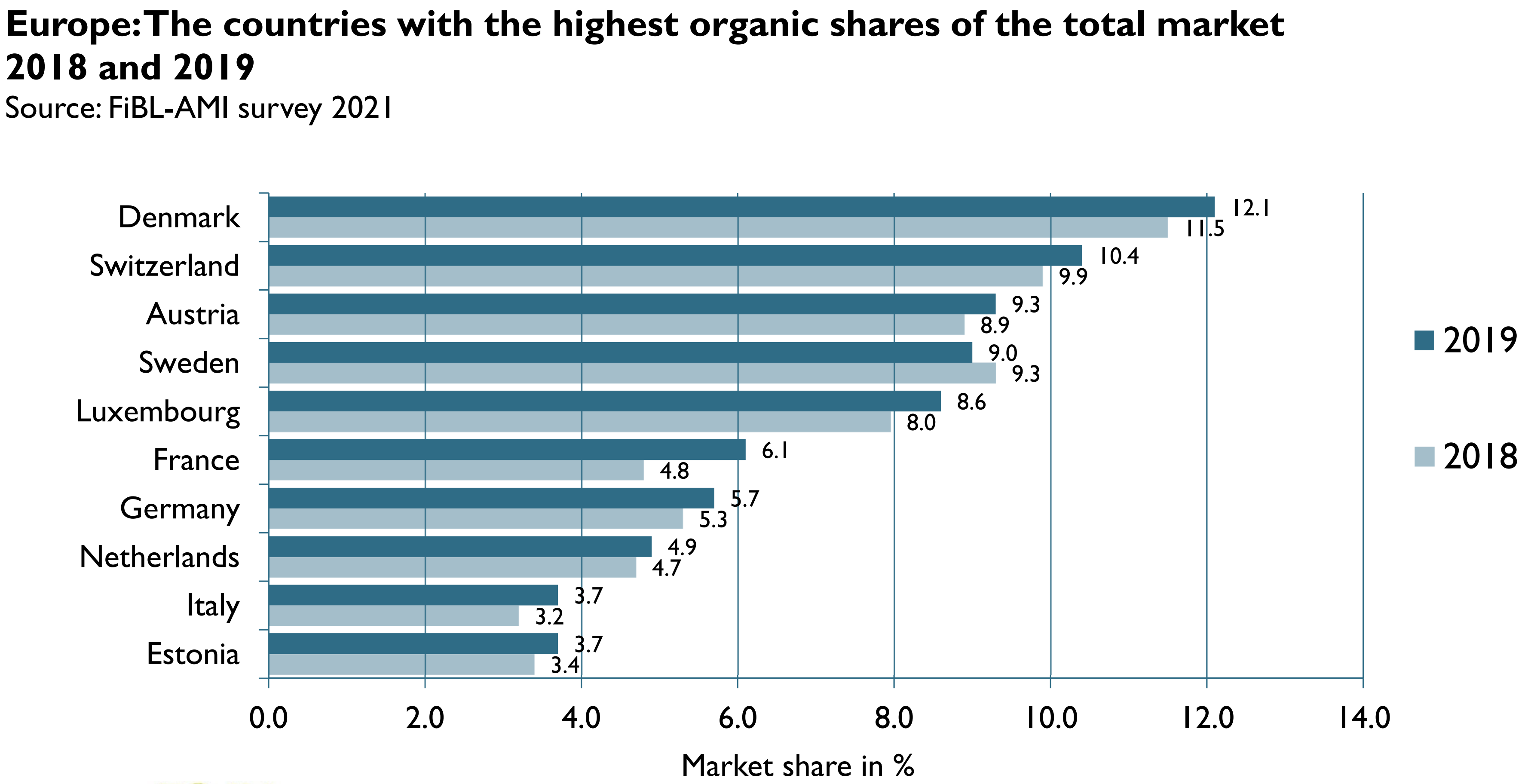


Market growth

Europe: The countries with the highest growth of the organic market 2019
Source: FiBL-AMI survey 2021



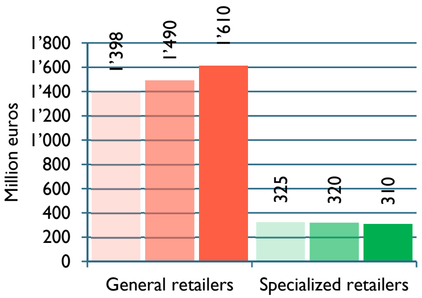
Europe: The ten countries with the highest organic market shares



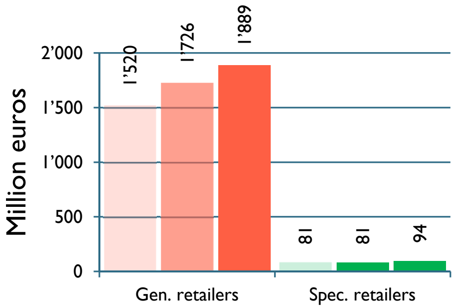
European Union: Development of organic retail sales by channel for selected countries 2017-2019

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

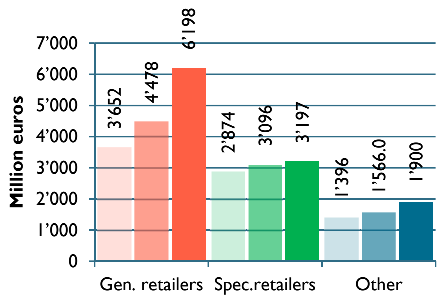
Austria



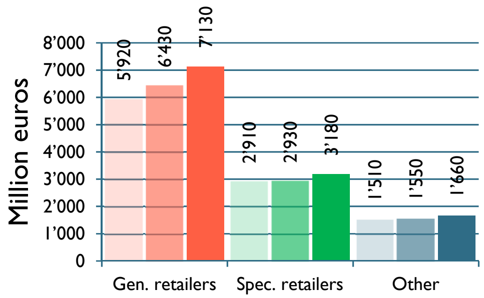
Denmark



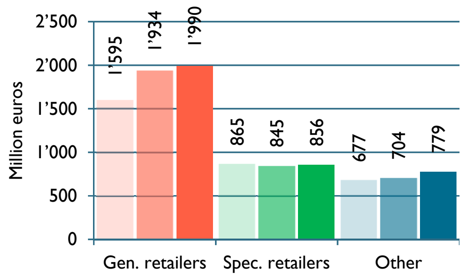
France



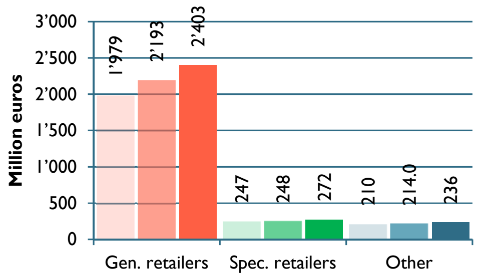
Germany



Italy



Switzerland



2017 2018 2019

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Key trends and developments: COVID 19

- The COVID-19 pandemic has had a tremendous impact on most people's **purchasing behaviour** and thus has given the organic market an unprecedented upturn in many countries.
- **Health, environment and climate change** have become big issues.
- **Online-sales** such as subscription boxes for organic have grown tremendously and other forms of contactless shopping such as 'Click and Collect'.
- Most experts see at least a **similar sales level**, as people's awareness of organic and environmental and health issues will remain.
- On the agricultural side: with the growing market **organic production and processing need grow at the same level** as the market.

The European Union's Farm to Fork-strategy can support this development with several measures.

Any effect of the health crisis ?

- Organic as a **refuge** (eggs, fruits & vegetables)
- **Limited supplies** in conventional (flour)
- **Local buying** as organic is especially embodied in direct selling in France (fruits & vegetables)

But

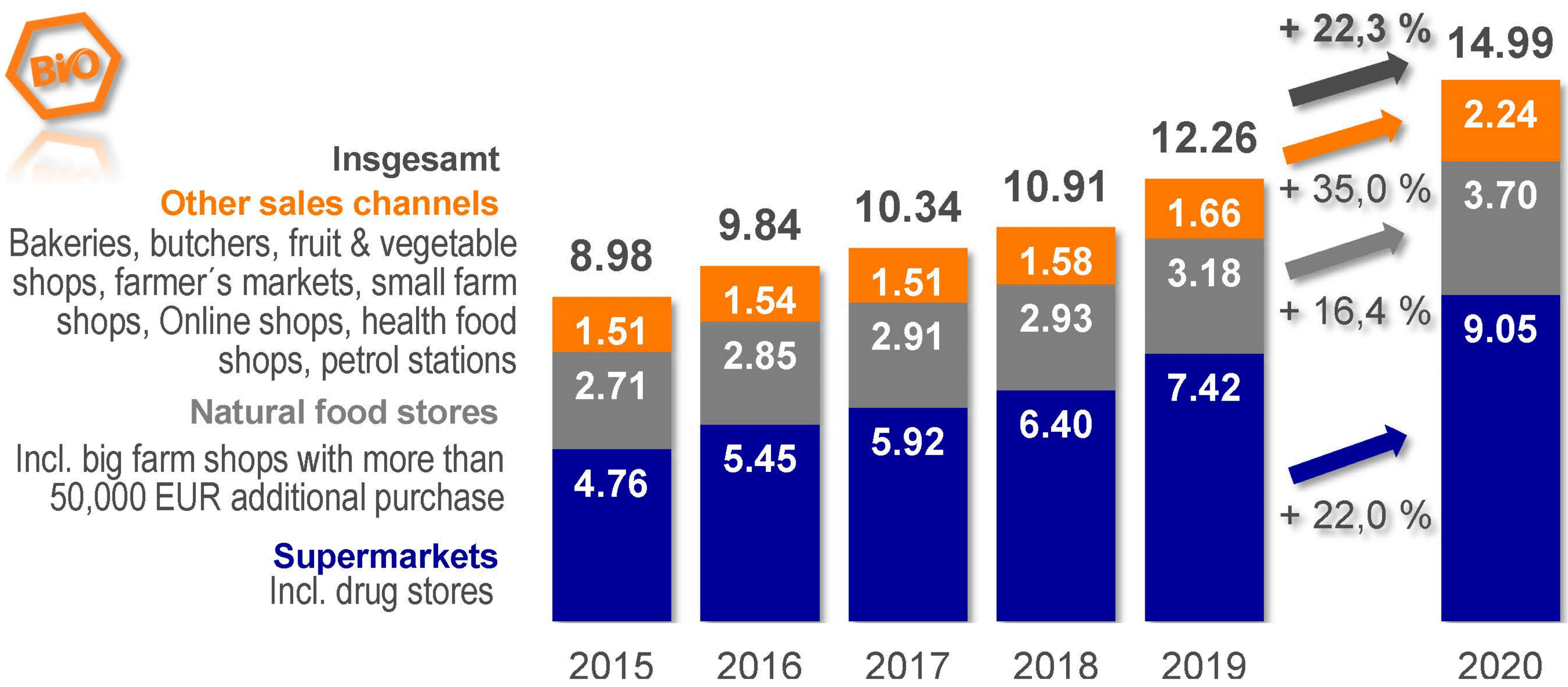
- Organic market did not recruit "new" consumers (61% were already buyers),
- Back to their usual consuming habits

67% have confidence

looking for **reinsurance** "local" and Fairtrade ? **consistency** of the story behind the product ?

22 % more organic sales, nearly 15 billion EUR

Organic food sales in Germany, in billion EUR excl. Catering



Key trends and developments: Farm to Fork strategy

- The Farm to Fork strategy, at the heart of the European Green Deal **recognises the links between healthy people, healthy societies and a healthy planet.**
- The F2F strategy includes a target which aims at **achieving at least 25 percent of the EU's agricultural land under organic farming by 2030**

To reach this target the organic sector needs political support at all levels.

- a good regulatory framework
- adequate support under the **Common Agricultural Policy** – with clear support for organic in the national strategic action plans – and
- a powerful **European Organic Action Plan with** concrete actions supporting conversion, market development and capacity building of the European organic sector.
- Close **collaboration of all stakeholders**

Conclusions

- In 2019 organic farming continued to **grow** both in **Europe and world wide**; and again all time highs were reached for the organic **farmland, producers and market.**
- Imports to the European Union remained stable, showing the the **EU is increasing local production.**
- Major themes in 2020 were the impact of **COVID-19** and the **Farm to Fork Strategy**, both of which are expected to have a **positive effect** on the organic sector.
- Public food procurement is on the rise, but **data are missing** in order to have a clear picture.
- 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.

Thank you very much for your attention!

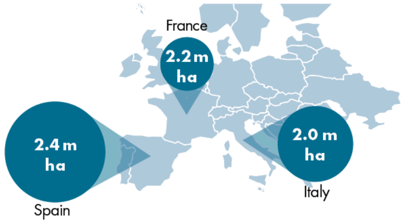
Resources

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

Organic Agriculture in Europe 2019

Organic Farmland 2019

Top 3 countries (largest organic area)



16.5 m ha Organic farmland in million hectares

+5.9% From 2018

3.3% Organic share of total farmland

Organic share of total farmland: Top 3 countries

Liechtenstein	41.0%
Austria	26.1%
Estonia	22.3%

Organic Producers & Processors 2019

The number of organic producers is increasing

430'794 Organic producers

+2.8% From 2018

81'719 Organic processors

+5.9% From 2018

Number of producers: Top 3 countries

Turkey	74'545
Italy	70'561
France	47'196

Organic Market 2019

The European market is growing

45.0 European organic retail sales in billion euros

55.8 € Per capita spending

+8.0% Organic market growth

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

Germany	12.0
France	11.3
Italy	3.6

France: 13.4% Organic market growth

Denmark: 12.1% Market share

Denmark: 344 € Highest per capita spending is in Denmark

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Source: FiBL survey based on national sources

More information: www.organic-world.net - statistics.fibl.org

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