Organic Agriculture in Europe: Current Statistics

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The Global Market for Organic Food

BioFACH Congress eSPECIAL, February 18, 2 PM
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
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

<table>
<thead>
<tr>
<th>Country</th>
<th>Million hectares</th>
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<tbody>
<tr>
<td>Australia</td>
<td>3.67</td>
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<tr>
<td>Argentina</td>
<td>3.67</td>
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<tr>
<td>Spain</td>
<td>2.35</td>
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<tr>
<td>United States of America</td>
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<td>India</td>
<td>2.30</td>
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<td>France</td>
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<td>China</td>
<td>2.22</td>
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<td>Uruguay</td>
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<tr>
<td>Italy</td>
<td>1.99</td>
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<tr>
<td>Germany</td>
<td>1.61</td>
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Million hectares

Graph showing distribution of organic agricultural land across different continents.
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

The countries with the highest shares of organic farmland shares:

- Liechtenstein: 41.0%
- Austria: 26.1%
- Sao Tome and Principe: 24.9%
- Estonia: 22.3%
- Sweden: 20.4%
- Switzerland: 16.5%
- Czech Republic: 15.4%
- Uruguay: 15.3%
- Italy: 15.2%
- Latvia: 14.8%
- Samoa: 14.5%
- Finland: 13.5%
- French Guiana (France): 11.3%
- Denmark: 10.9%
- Slovenia: 10.3%
- Slovakia: 10.3%
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

Certified area (ha)

<table>
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<tr>
<th>Year</th>
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<td>2001</td>
<td>47,109 farms</td>
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<td>2002</td>
<td>23,090 operators</td>
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<td>2019</td>
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Number of operators

- 2019
- 8.5% of French UAA

2020, the dynamic of engagement is sustained
EU: Land use 2004-2019

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

Million hectares

- Permanent grassland
- Permanent crops
- Arable crops
EU: Growth of organic area and retail sales

EU: Growth of organic area and retail sales
2000-2019
Source: FiBL-AMI surveys 2009-2021
The biggest organic markets worldwide (Yellow: Europe)

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

- United States of America: 44'721
- Germany: 11'970
- France: 11'295
- China: 8'504
- Italy: 3'625
- Canada: 3'480
- Switzerland: 2'912
- United Kingdom: 2'679
- Sweden: 2'144
- Spain: 2'133

Retail sales in million euros

North America 45%
Europe 43%
Asia 10%
Others 2%
Europe and European Union: Development of retail sales  2000-2019


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

Europe: The countries with the highest organic shares of the total market 2018 and 2019
Source: FiBL-AMI survey 2021

- Denmark
- Switzerland
- Austria
- Sweden
- Luxembourg
- France
- Germany
- Netherlands
- Italy
- Estonia

Market share in %

- 2019
- 2018

Estonia
Italy
Sweden
Austria
Germany
Netherlands
France
Luxembourg
Switzerland
Denmark

Europe: The countries with the highest organic shares of the total market 2018 and 2019
Source: FiBL-AMI survey 2021
European Union: Development of organic retail sales by channel for selected countries 2017-2019


Austria

Denmark

France

Germany

Italy

Switzerland

FiBL
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

**Insgesamt**

**Other sales channels**
Bakeries, butchers, fruit & vegetable shops, farmer’s markets, small farm shops, Online shops, health food shops, petrol stations

**Natural food stores**
Incl. big farm shops with more than 50,000 EUR additional purchase

**Supermarkets**
Incl. drug stores

- **2015:**
  - 8.98 billion EUR
  - 1.51 billion EUR
  - 5.45 billion EUR

- **2016:**
  - 9.84 billion EUR
  - 1.54 billion EUR
  - 5.45 billion EUR
  - 2.85 billion EUR

- **2017:**
  - 10.34 billion EUR
  - 1.51 billion EUR
  - 5.92 billion EUR
  - 2.91 billion EUR

- **2018:**
  - 10.91 billion EUR
  - 1.58 billion EUR
  - 6.40 billion EUR
  - 2.93 billion EUR

- **2019:**
  - 12.26 billion EUR
  - 1.66 billion EUR
  - 7.42 billion EUR
  - 3.18 billion EUR

- **2020:**
  - 14.99 billion EUR
  - 2.24 billion EUR
  - 9.05 billion EUR
  - 3.70 billion EUR

+ 22.3%
+ 35.0%
+ 16.4%
+ 22.0%
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 worldwide; 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

- 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)

- France: 2.2 m ha
- Italy: 2.0 m ha
- Spain: 2.4 m ha

16.5 m ha Organic farmland in million hectares

+5.9% Organic share of total farmland

3.3% Organic share of total farmland: Top 3 countries

Organic Producers & Processors 2019
The number of organic producers is increasing

- Organic producers: 430'794 (+2.8%)
- Organic processors: 81'719 (+5.9%)

Number of producers: Top 3 countries

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

Organic Market 2019
The European market is growing

- European organic retail sales in billion euros: 45.0
- Per capita spending: 55.8 €
- Organic market growth: +18.9%

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

- Germany: 12.0
- France: 11.3
- Italy: 3.6

13.4% Organic market growth
12.1% Market share
344 € Highest per capita spending is in Denmark

Source: FiBL survey based on national sources
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More information: www.organicworld.net - statistics.fibl.org
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