Organic Farming and Market Development in Europe and the European Union

JAN TRÁVNÍČEK,[1] HELGA WILLER[2] AND DIANA SCHAACK[3]

In 2019, the development of the organic sector in the European Union was characterised by continued growth in all key indicators. In 2019, the organic market grew more than the organic area, thus continuing the trend of the past several years. Only in 2018 did the organic farmland grow at a faster rate than the market. While it is good to see strong market growth, the organic farmland area needs to continue to grow, as growth will be needed to reach the 25 percent organic area share goal set out by the European Commission (2020) in its Farm to Fork strategy.

1 Key facts and figures: Production and market highlights

More than 16.5 million hectares of farmland were organic in Europe in 2019 – Spain had the largest area

In Europe, 16.5 million hectares were managed organically in 2019 (European Union: 14.6 million hectares). With almost 2.4 million hectares, Spain continued to be the country with the largest organic area in Europe (more than 14 percent of the European organic farmland), followed by France (2.2 million hectares), and Italy (2.0 million hectares).

European organic farmland increased by almost one million hectares

The organic land increased by more than 0.9 million hectares in Europe (with a major increase in farmland in the France and Ukraine) and by more than 0.8 million hectares in the European Union, representing an increase of 5.9 percent in Europe and in the European Union. Growth was a bit lower than in 2018 but higher than in the first years of the current decade. From 2010 to 2019, the organic agricultural land increased by more than two thirds.

Liechtenstein is the country with the highest organic area share in the world

Organic farmland in Europe constitutes 3.3 percent of the total agricultural land and 8.1 percent in the European Union. In Europe (and globally), Liechtenstein has the highest organic share of all farmland (41.0 percent) followed by Austria, the country in the European Union with the highest organic share of agricultural land (26.1 percent).

Organic producers, processors and importers on the rise

There were almost 430’000 organic producers in Europe (European Union: more than 343’000), with the largest numbers in Turkey (74’545) and Italy (70’561). While in 2019 the number of producers grew by 2.8 percent in Europe (5.0 percent in the European

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[1] Jan Trávníček, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[2] Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[3] Diana Schaack, Agrarmarkt Informations-Gesellschaft mbH, Bonn, Germany, www.ami-informiert.de

Union), growth was 58 percent in Europe and 56 percent in the European Union from 2010-2019.

There were more than 81'719 organic processors in Europe (+8.5 percent compared to 2018) and almost 78’240 in the European Union (+9.1 percent). The country with the largest number of processors was Italy (21'940).

The number of importers grew faster than the number of producers and processors: More than 6’500 importers (+12.1 percent) were counted in Europe and more than 5’747 in the European Union (+13.9 percent). Germany had the most importers (1'831).

Retail sales reached the 45 billion euro mark - Market continues to grow

Organic retail sales in Europe were valued at 45.0 billion euros (41.4 billion euros in the European Union). The European Union represents the second largest single market for organic products after the United States. With 11.97 billion euros of retail sales, Germany is the biggest market in Europe and the world's second-largest.

The European organic market recorded a growth rate of 8.0 percent (European Union: 8.0 percent). The highest growth was observed in France (13.4 percent). In the decade 2010-2019, the European and European Union organic market values more than doubled.

Organic imports – China is the largest supplier

Data on organic imports to the European Union in 2019 show that a total of 3.2 million metric tons of organic products were imported to the European Union. The largest supplier was China; the key product group was tropical fruit. The largest importer was The Netherlands.

European consumers spend more on organic food

European consumers spent 56 euros on organic food per person in 2019 (European Union: 84 euros). Per capita, consumer spending on organic food has doubled in the last decade. Danish and Swiss consumers spent the most on organic food per capita (344 and 338 euros, respectively).

Highest organic market shares are in Europe

Globally, EU countries account for the highest organic food sales shares as percentages of their respective food markets. Denmark had the highest organic market share globally (12.1 percent) and was the first to pass the 10 percent mark. Austria with 9.3 percent, is expected to reach the 10 percent mark soon.

2. Organic agricultural land: Area, organic shares, growth

Table 59: Europe: Organic agricultural land in Europe and the European Union 2019

	Organic area [million ha]	Organic share [%]	Change 2018-2019 [%]	Change 2018-2019 [million ha]	Change 2010-2019 [%]	Change 2010-2019 [million ha]
European Union	14.6	8.1%	5.9%	0.8	61%	5.5
Europe	16.5	3.3%	5.9%	0.9	65%	6.5

Source: FiBL-AMI survey based on Eurostat and national data sources. For country details, see Table 66.

2.1 Organic agricultural land

In 2019, 16.5 million hectares were farmed organically in Europe and almost 14.6 million hectares in the European Union (Table 59). Almost 90 percent of Europe's organic farmland was in the European Union. The countries with the largest organic land areas were Spain (14 percent of Europe's organic farmland), France, Italy, and Germany. 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 in 2017.

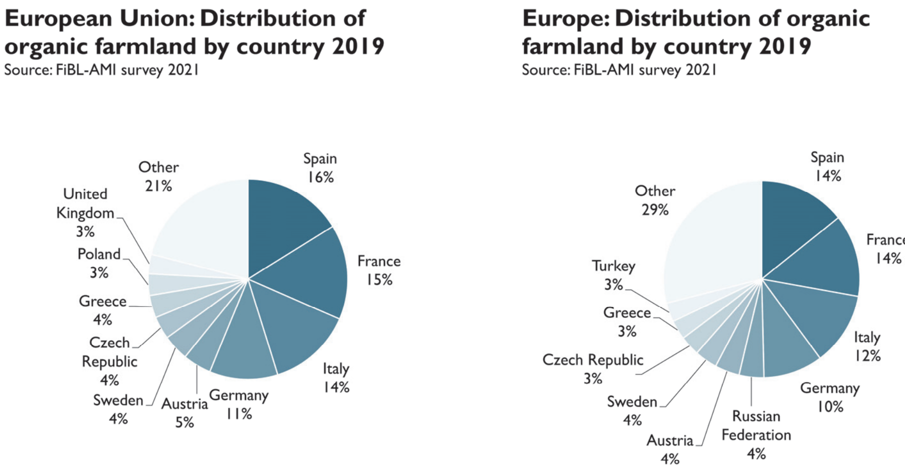


Figure 69: Europe: Distribution of organic farmland by country 2019

Source: FiBL-AMI survey 2021 based on national data sources and Eurostat
For detailed data sources, see annex

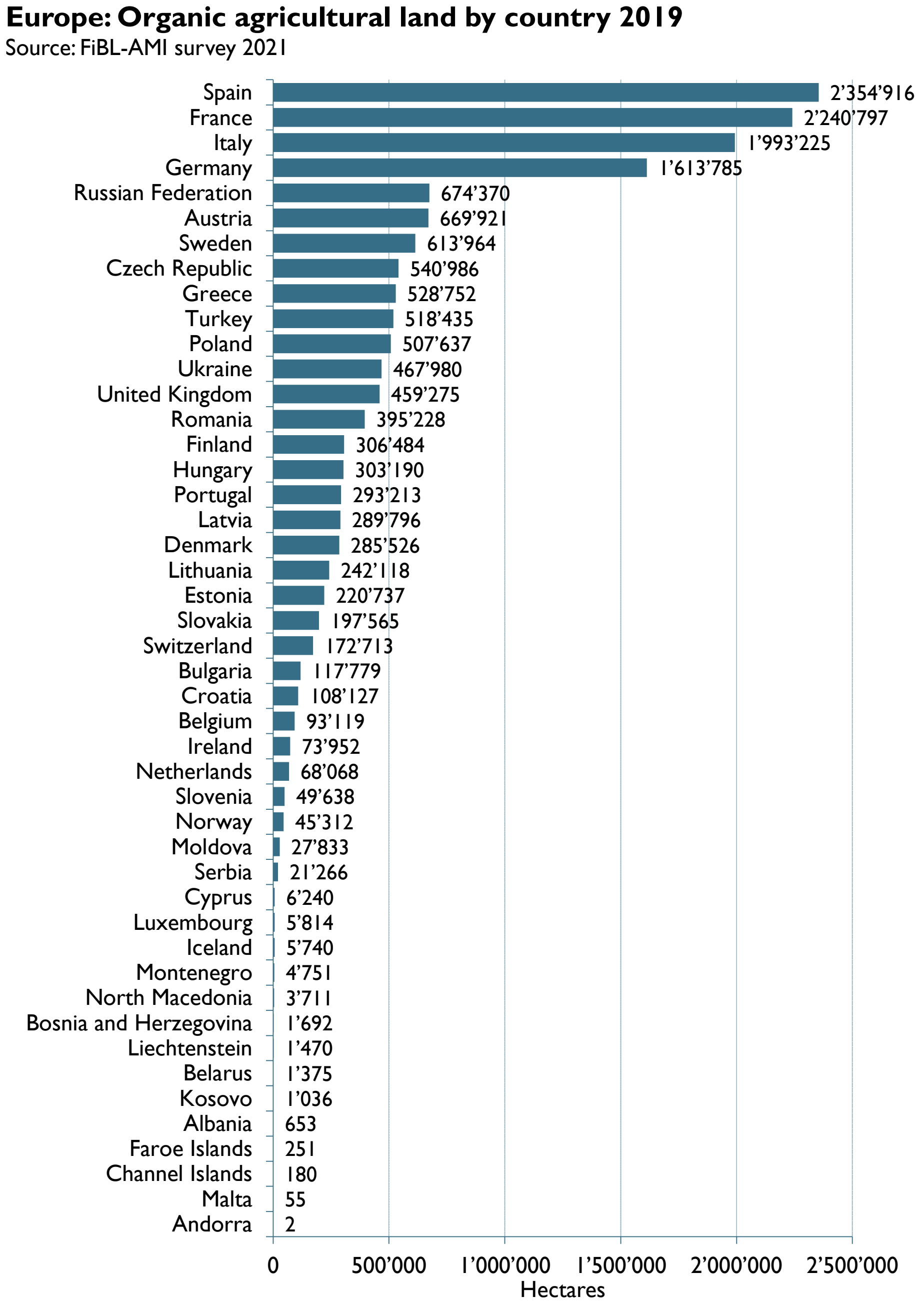


Figure 70: Europe: Organic agricultural land by country 2019

Source: FiBL-AMI survey 2021 based on Eurostat national data sources.
For detailed data sources see annex.

2.2 Organic shares of total agricultural land

In Europe, 3.3 percent of the agricultural land is organic, and in the European Union, 8.1 percent (Table 59). In twelve countries (European Union: ten), 10 percent or more agricultural land is managed organically (Figure 71). The countries with the highest organic shares are Liechtenstein (41.0 percent), Austria (26.1 percent), Estonia (22.3 percent), and Sweden (20.4 percent). Liechtenstein is the country with the highest organic farmland share in the world.

2.3 Growth of organic agricultural land

In 2019, the organic agricultural land in Europe increased by 0.92 million hectares (EU: 0.82 million hectares) or 5.9 percent (EU: 5.9 percent). In Europe, the absolute growth was higher than in the European Union, due to a major increase in organic farmland in Ukraine (+158’880 hectares).

The countries that contributed the most to the growth were France, Ukraine, Spain, Hungary, Germany, and Portugal, contributing almost 740’000 additional hectares (Figure 74). The highest relative increases were in Kosovo (+548 percent), Bosnia and Herzegovina (+88 percent), Moldova (+62 percent) and Ukraine (+51 percent). However, some countries showed a decrease in organic land, such as Turkey, Ireland, Iceland, and Bulgaria (Table 66).

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, such as Austria, Germany and Switzerland (Table 67).

In Europe, of the 16.5 million hectares of organic agricultural land, 11.1 million hectares were fully converted[1] (10.0 million out of 14.6 million hectares in the European Union). At least 2.6 million hectares were under conversion (2.3 million in the European Union). The conversion area 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 Western and Southern European countries, notably France (565’571 hectares), Italy (383’127 hectares), Spain (346’622 hectares), and Romania (183’741 hectares) (Table 67).

[1] Excluding Austria, Germany and Switzerland

Europe: Organic share of total agricultural land by country and country group 2019
Source: FiBL-AMI survey 2021

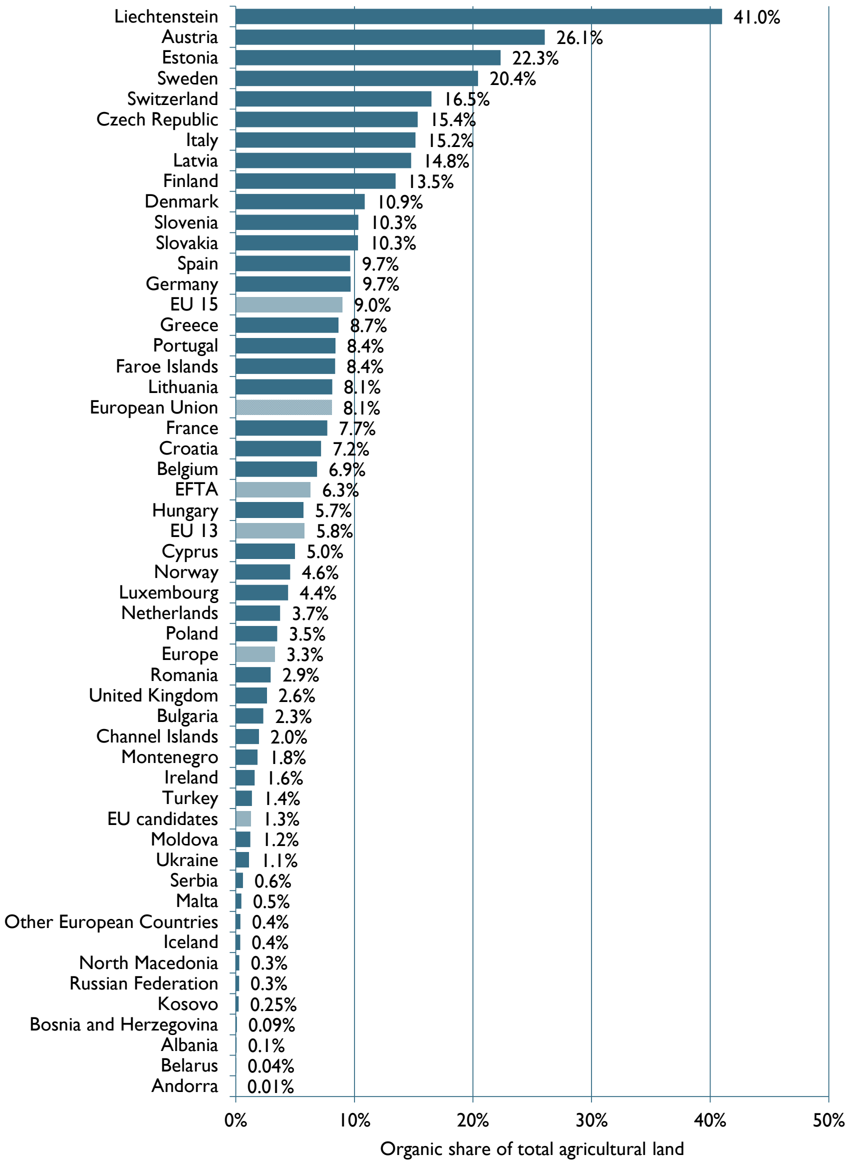


Figure 71: Europe: Organic shares of total agricultural land 2019

Source: FiBL-AMI survey 2021 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.

Europe and European Union: Development of organic agricultural land 1985-2019

Source: Nic Lampkin, FiBL-AMI survey 2021, based on national data sources and Eurostat

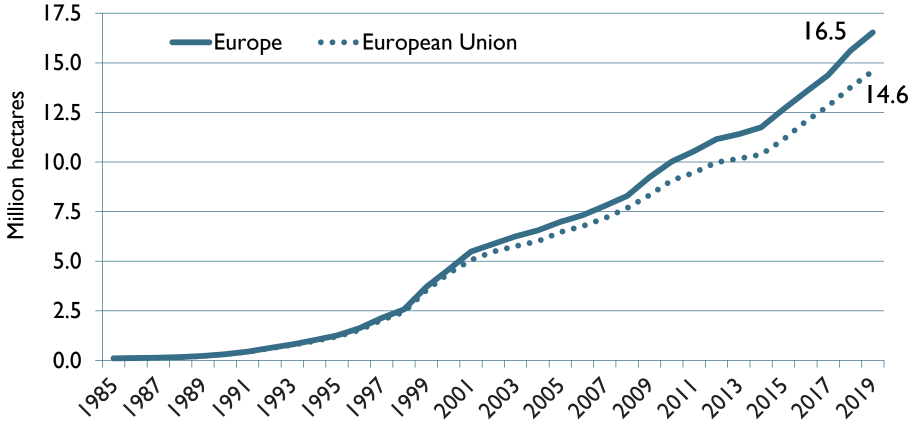


Figure 72: Europe and the European Union: Development of organic agricultural land 1985-2019

Source: FiBL-AMI Surveys 2006-2021 based on national data sources and Eurostat. Data from before 2000 based on surveys from Nic Lampkin. The data for the European Union covers all countries that were members of the European Union in 2019.

Europe and European Union: Growth rates of organic agricultural land 1986-2019

Source: FiBL-AMI survey 2021, based on national data sources and Eurostat

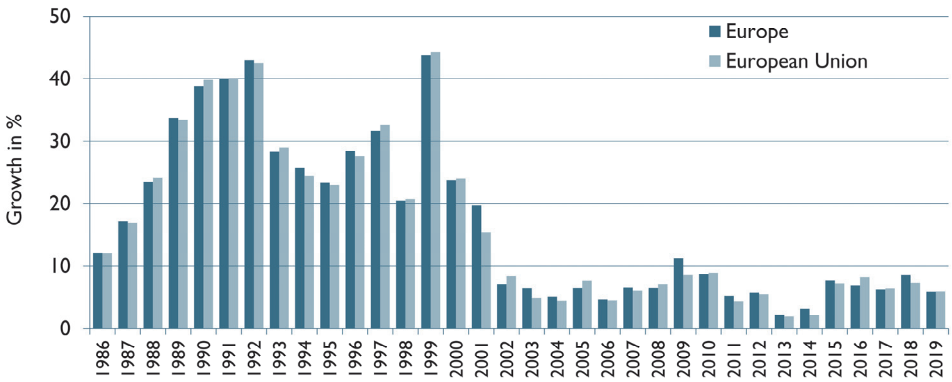
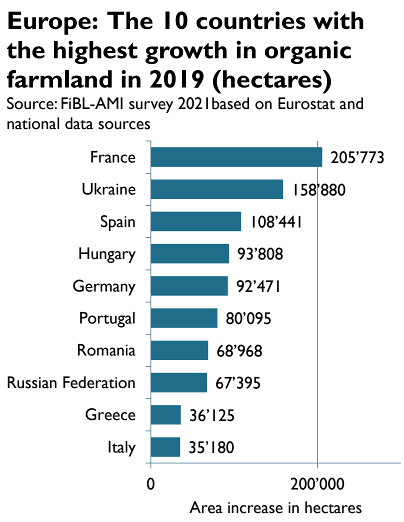


Figure 73: Europe: Growth rates for organic agricultural land in Europe and the European Union 1985-2019

Source: FiBL-AMI Surveys 2006-2021 based on national data sources and Eurostat. Data from before 2000 based on surveys from Nic Lampkin. For detailed data sources see annex.



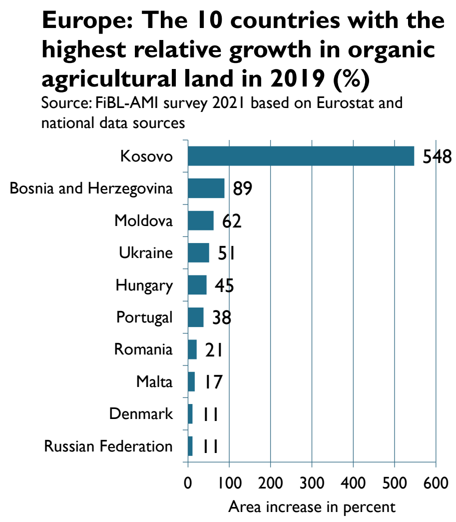


Figure 74: Europe: The ten countries with the highest growth in organic agricultural land in hectares and percentage in 2019

Source: FiBL-AMI survey 2021 based on national data sources and Eurostat
For detailed data sources see annex.

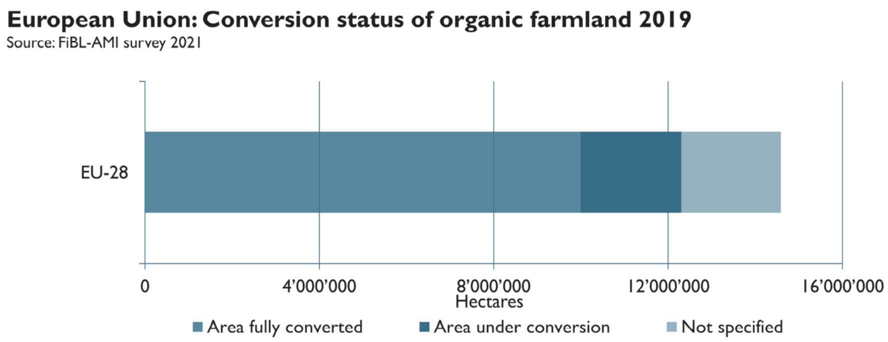


***Figure* 75: Europe and the European Union: Conversion status of organic land in Europe and the European Union 2019**

Source: FiBL-AMI survey 2021 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 60: Europe and the European Union: Land use 2019

Crop group	Europe [Million hectares] (Share of total)	European Union [Million hectares] (Share of total)	Change 2018-2019 Europe/EU [%]	Change 2015-2019 Europe/EU [%]
Arable land	7.8 (3.6%)	6.6 (7.2%)	4.5%/7.5%	38%/39%
Permanent grassland	6.5 (3.5%)	6.4 (10.0%)	4.6%/4.4%	22%/23%
Permanent crops	1.8 (10.5%)	1.6 (13.4%)	4.6%/7.5%	28%/29%
Total	**16.5 (3.3%)**	**14.6 (8.1%)**	**5.9%/5.9%**	**31%/31%**

Source: FiBL-AMI survey 2021 based on national data sources Eurostat.
Note: Total includes other agricultural land and correction values for double-cropped areas.

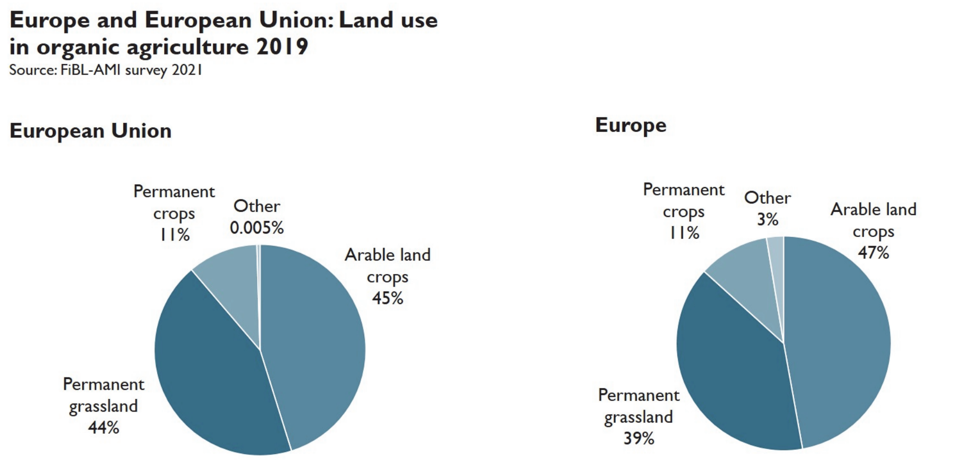


Figure 76: Europe and European Union: Distribution of land use in organic agriculture 2019

Source: FiBL-AMI survey 2021 based on Eurostat and national data sources

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[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 land use data.

Table 60 and Figure 76 show that arable land constitutes a large part of the organic farmland, with almost 7.8 million hectares in Europe and 6.6 million hectares in the European Union (47 and 45 percent of the organic farmland, respectively). The arable land share is higher in Europe, as the Russian Federation and Ukraine have large areas for producing cereals, oilseed, and dry pulses. Permanent grassland accounted for 6.5 million hectares in Europe and 6.4 million hectares in the European Union. Permanent crops constituted 11 percent of the organic farmland with 1.8 and 1.6 million hectares in Europe and the European Union, respectively.

Compared to total agriculture (based on FAO land use data and not strictly comparable), organic arable land constitutes 3.6 percent of the total arable land in Europe and 7.2 percent in the European Union. Whereas the organic share of total permanent grazing area is as high as 13.4 percent in the European Union, it is lower in Europe (3.5 percent). Permanent crops have the highest organic shares: 13.4 percent in the European Union and 10.5 percent in Europe.

The largest increase in 2018-2019 was in arable crops (4.5 percent in Europe), mainly because additional organic arable area was reported for Germany and France. In the European Union, arable land increased by 7.5 percent. Grassland increased by 4.6 percent in Europe and 7.5 percent in the European Union (Table 60, Figure 78, Figure 79.) Arable land grew by almost 40 percent in the 2015-2019 period, and thus showed a greater increase than the permanent crops, which grew by about 30 percent, and permanent grassland, which grew by more than 20 percent (Table 60, Figure 78, Figure 79). It also shows the intensification of organic agriculture, as the share of extensive grassland is decreasing. By country, the largest permanent grassland or grazing area is in Spain with almost 1.3 million hectares, followed by Germany and France (Figure 77). The largest cropland area (i.e., arable and permanent crops together) are in Italy (1.5 million hectares), France (1.5 million hectares) and Spain (1.1 million hectares) (Figure 77).

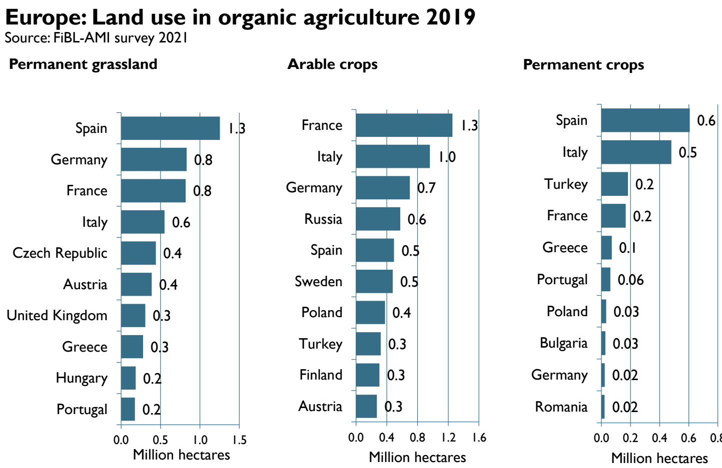

Figure 77: Europe: Land use in organic agriculture by top 10 countries 2019

Source: FiBL-AMI survey 2021 based on Eurostat and national data sources

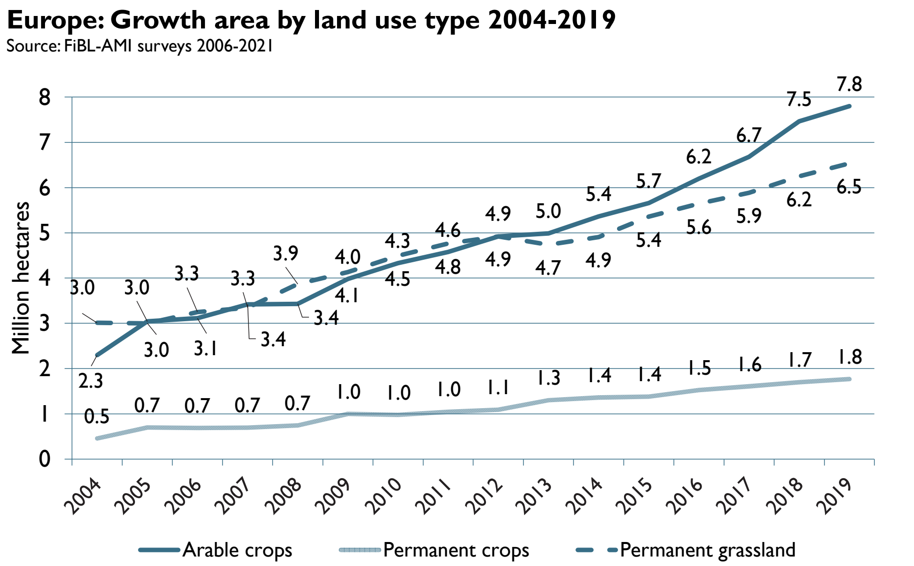

Figure 78: Europe: Growth in organic agricultural land by land use type 2004-2019

Source: FiBL-AMI Surveys 2006-2021 based on national data sources and Eurostat

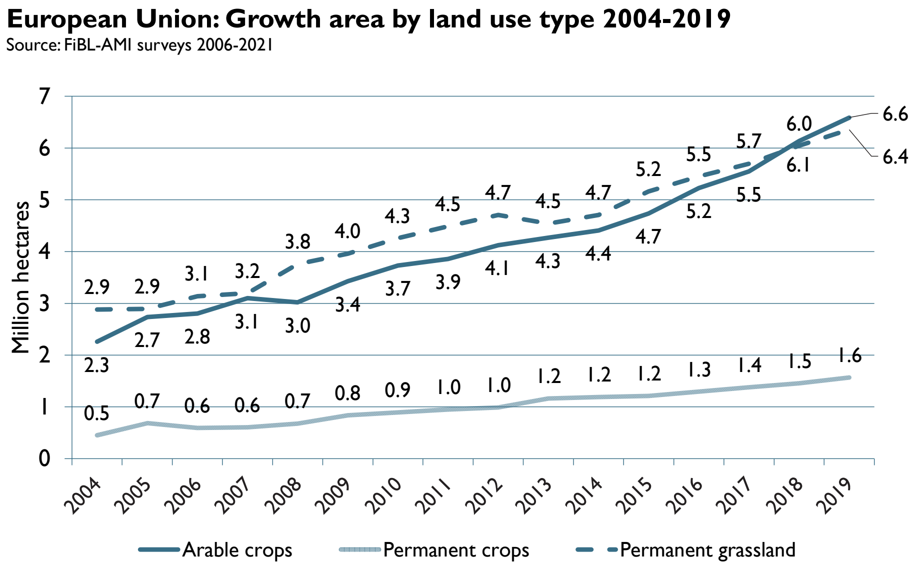

Figure 79: European Union: Growth in organic agricultural land by land use type 2004-2019

Source: FiBL-AMI Surveys 2006-2021 based on national data sources and Eurostat

3.2 Crops grown in organic agriculture

In 2019, all key arable and permanent crop groups showed growth in the European Union (Table 61).

Table 61: Europe and the European Union: Key crops/crop group 2019

	Crop group	Area (ha)		Organic share (%)		Change 2018-2019		Change 2015-2019	
		Europe	EU	Europe	EU	Europe	EU	Europe	EU
Arable crops	Cereals	2'958'165	2'417'003	2.3%	4.3%	12.9%	11.9%	72.5%	70.7%
	Dry pulses	548'275	467'449	8.4%	21.6%	7.1%	3.8%	134.9%	125.0%
	Green fodder	2'568'805	2'511'938	10.5%	11.1%	5.9%	10.7%	61.0%	73.8%
	Oilseeds	653'600	345'071	1.8%	3.1%	29.3%	8.8%	247.3%	139.3%
	Root crops	58'126	50'320	0.7%	1.4%	5.3%	20.6%	41.9%	63.2%
	Vegetables	201'071	186'480	4.4%	8.7%	8.6%	8.6%	84.9%	90.0%
Permanent crops	Berries	45'308	40'833	14.5%	25.5%	13.0%	11.6%	73.7%	63.1%
	Citrus fruit	57'472	56'738	8.7%	11.1%	8.3%	8.4%	121.7%	125.7%
	Grapes	398'659	381'560	10.2%	12.1%	8.8%	9.2%	106.8%	109.7%
	Nuts	336'560	291'653	14.6%	23.5%	-1.8%	4.6%	79.9%	72.6%
	Olives	624'260	541'776	10.5%	10.7%	3.5%	4.8%	69.9%	56.8%
	Temperate fruit	147'926	121'267	5.3%	9.7%	5.7%	7.7%	56.0%	59.0%
	(Sub)Tropical fruit	38'874	18'798	17.8%	12.9%	7.9%	15.9%	124.6%	211.4%

Source: FiBL-AMI survey 2021 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 90 and statistics.fibl.org

Arable crops

A large proportion of the organic arable land (7.9 million hectares in Europe and 6.6 million in the European Union) is used to produce cereals and green fodder from arable land, which 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. In contrast, they have disappeared in conventional farming, as protein crops for animal feed are imported and fertility provided by crop rotations is replaced by fertiliser. Of the major groups, oilseeds and cereals showed the highest increase in land area. Over the 2015-2019 period, the largest growth was noted for oilseeds, which more than doubled. For more information about crop groups by country, see the crop chapters in this book (page 90) and our online database at statistics.fibl.org.

– **Cereals** were the largest crop group in Europe, accounting for 3.0 million hectares or 2.3 percent of the cereal area in Europe. In the European Union, they were the second-largest group, accounting for 2.4 million hectares or 4.3 percent of the total cereal area. Wheat is the most important cereal (1.1 million hectares). The countries with the largest cereal areas are Germany and France (approx. 348′000 hectares), and Italy (including large areas of durum wheat). The highest organic shares of the total cereals area are in Austria (17.5 percent), Estonia (14.8 percent) and Sweden (13.1 percent). Outside the European Union, the Russian Federation, Turkey and Ukraine are major cereal producers.

- In the European Union, the arable crop group with the largest area was for **plants harvested green** (green fodder from arable land) with 2.6 million hectares (Europe: 2.5 million hectares). Clover, green maize, and grass on arable land were the main crop types.
- In 2019, organic **vegetables**[1] were grown on almost 201’000 hectares of land in Europe, and more than 186’000 hectares in the European Union, covering 4.4 percent and 8.7 percent of the vegetable area, respectively. The largest areas were in Italy (64'762 hectares), France (30'690 hectares), and Spain (22'022 hectares). High organic shares of all vegetables are found in Luxembourg (50 percent), Iceland (44.8 percent) and Denmark (33.5 percent).
- With 548’000 hectares in Europe and 467′000 hectares in the European Union, organic **dry pulses** accounted for a large share of all dry pulses (8.4 percent in Europe; 21.6 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 European organic farmers' efforts to improve soil fertility and become less dependent on imports of protein crops. The countries with the largest areas of dry pulses were France (131’070 hectares), Germany (52’000 hectares), Italy (47’523) and Poland (47'101 hectares). The highest organic shares were found in Austria (70 percent), Finland (65 percent), and Denmark (48 percent).

Permanent crops

A large part of the permanent cropland (1.8 million hectares in Europe and 1.6 million hectares in the European Union) is used to grow olives, grapes, and nuts. Olives cover one-third of the permanent crop area, and grapes one fifth. Over the 2015-2019 period, the largest growth was noted for tropical and subtropical fruit, which more than doubled. In Europe, olives (0.62 million hectares) and grapes (0.4 million hectares) cover two-thirds of the permanent cropland (Table 61). Both reach an organic share of more than 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 Eurostat 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 the crop chapters in this book (page 90) and our online database at statistics.fibl.org.

- Spain, France, and Italy had an organic **grape** area of more than 100’000 hectares each. Together with Austria (13.5 percent), they had the highest organic shares of grapes (except some minor organic grape producers that reach even higher shares, such as Poland or Belgium). In Italy, 15.7 percent of the grape area is organic, in France 14.8 percent, and in Spain 12.9 percent.

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

- For **olives**, Italy and Spain also have the lead (242'708 hectares and 209'708 hectares, respectively). France (33 percent) and Italy (21 percent) have the highest organic shares. The largest growth occurred in Spain, where the organic olive area increased by more than 9’000 hectares in 2019.
- Temperate fruits were grown on 147'926 hectares (European Union 121'267 hectares), and they covered 5.3 percent of the total temperate fruit area (9.7 percent in the European Union). Several countries in the European Union had 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 (66’657 hectares), cherries (17’627 hectares), plums (17’602 hectares) and apricots (16’382 hectares). The largest temperate fruit producers were Italy (26'499 hectares), France (23'450 hectares) and Turkey (20'244 hectares).

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 10.6 million hectares (European Union: 7.2 million hectares). The largest wild collection area in Europe (and in the world) is in Finland with 4.6 million hectares (mainly berries). For country details on wild collection areas, see Table 21.

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, considering all currently available information, the organic animal sector is developing rapidly in European countries. Table 62 provides an overview of European organic livestock in 2019. In many countries, organic animal husbandry began with beef, lamb, and milk production. In Europe, lmost 5.1 million bovine animals, more than 5.4 million sheep, almost 1.6 million pigs, and more than 62.3 million poultry were kept. For European Union data, see Table 62.

Table 62: Europe and the European Union: Organic livestock 2019

	Europe				European Union	
	Animals [head]	Organic share of total [%]	Change 2018-2019 [%]	Change 2010-2019 [%]	Animals [head]	Organic share of total [%]
Bovine animals	5'079'962	4.0%	4.1%	80.9%	4'852'303	6.0%
Sheep	5'413'520	3.5%	-9.7%	55.3%	5'214'634	5.3%
Pigs*	1'586'702	0.9%	13.7%	109.6%	1'544'573	1.1%
Poultry**	62'317'071	2.5%	8.0%	110.0%	59'666'753	4.2%

Source: FiBL survey 2021 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 2010-2019 were similar for Europe and the European Union and are 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 621'000 in Europe, and 584'000 in the European Union.*
*** Also for poultry, there is no consistent reporting. According to the Agricultural Market Information Company (AMI), broilers' average stock was 15.1 million Europe and 14.6 million in the European Union. The average stock of laying hens was 27.3 million in Europe and 25.4 million in the European Union.*

The organic share of all livestock remains small compared to some crop groups, depending on the animal species between 0.9 percent and 4.0 percent in Europe (Table 62). Monogastric animals (pigs and poultry) account for the lowest shares. The low shares are due to different reasons. Among these are the insufficient local supply of organic feed, the difficulties in providing traceable certified feed imports, the high investment in pig and poultry barns and pens compared to conventional barns and pens and the high price premiums consumers have to pay. The highest organic shares were for sheep and cattle as the conversion of these rather extensive production

[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 stable 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 presented here should, therefore, be treated with caution and are only an approximation of the overall picture.

schemes is easier. Simultaneously, not all of the organic animal products are sold on the organic market at a premium price.

Between 2010 and 2019, the greatest increase was in poultry (110 percent), partly attributed to the high demand for eggs (see the section on the organic market in Europe; Table 65). However, beef and dairy cattle also grew substantially in that decade (+81 percent), as did sheep (+55 percent) and pigs (+110 percent) (Table 62).

For bovine animals (over 5 million head in Europe), the largest numbers are in Germany, France, and Austria (Table 70). The highest organic shares are in Latvia, Liechtenstein, Sweden, Austria, and Greece (all more than 20 percent). For sheep (5.4 million head in total), the largest numbers are in Greece, the United Kingdom, and France. The highest organic shares are in Latvia, Estonia, and the Czech Republic (all with more than 40 percent).

Looking at the available data for pig stocks, Germany Denmark, France and the Netherlands have the highest numbers (each with more than 100’000 heads). It should be noted that Denmark and France provide the number of slaughtered animals and not the average stock per year; meaning that their numbers are double as high compared to Germany and the Netherlands. Liechtenstein, Denmark and France have the highest shares. For poultry, we assume that – like for pigs – country-level data is not comparable, due to different definitions (Table 70).

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 2007 to meet the rising demand for milk and dairy products. Production now stands at 6.35 million metric tons (European Union: 6.04 million), constituting 3.4 percent of the European Union’s milk production from dairy cows in 2019 (Figure 80).

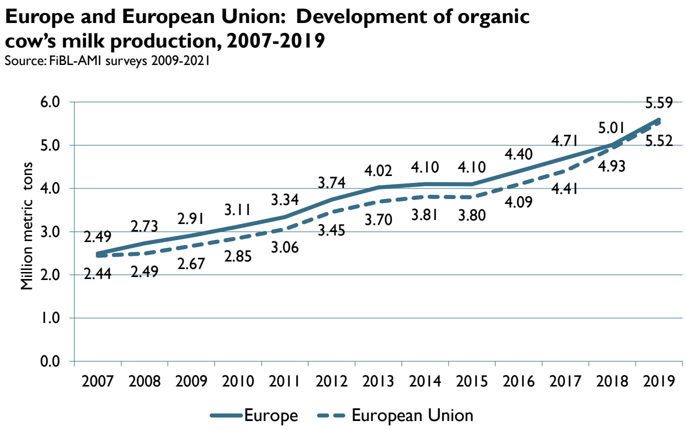


Figure 80: Europe and the European Union: Development of organic cow’s milk production 2008-2019

Source: FiBL survey 2009-2021

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 of the latter groups over the years. Hence, in the table below, a ten-year development is not shown for the number of exporters.

Table 63: Europe: Organic operators by country group 2019

	Europe			European Union		
	No.	Growth 1 year	Growth 10 years	No.	Growth 1 year	Growth 10 years
Producers	430'742	2.8%	57.6%	343'858	5.0%	56.0%
Processors	81'719	8.5%	113.3%	78'240	9.1%	109.0%
Importers	6'508	12.1%	120.6%	5'747	13.9%	101.2%
Exporters	3'508	4.7%	N/A	3'127	0.1%	N/A

Source: FiBL-AMI survey 2021 based on national data sources and Eurostat. For a breakdown by country, see Table 71. For detailed data sources, see annex.

5.1 Organic producers

In 2019, there were more than 430'000 organic producers in Europe and almost 344'000 in the European Union (Table 63 and Table 71). In the European Union, the country with the largest number of producers was Italy (more than 70'000); in Europe, it was Turkey (more than 74'500) (Figure 83). Growth in the European Union (+5.0 percent), was stronger than in Europe as a whole (+2.8 percent), mainly due to a significant increase in France, Germany, and Spain. Over the decade 2010-2019, the number of producers in Europe increased by 58 percent (EU: +56 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 81'719 organic processors in Europe (+8.5 percent compared to 2018) and more than 78'000 in the European Union (+9.1 percent). The country with the largest number of processors was Italy (21'940). More than 6'500 importers (+12.1 percent growth) were counted in Europe and more than 5'700 in the European Union (+13.9 percent). Germany was the country with the most importers (1'831) (Table 63, Table 71, Figure 82).

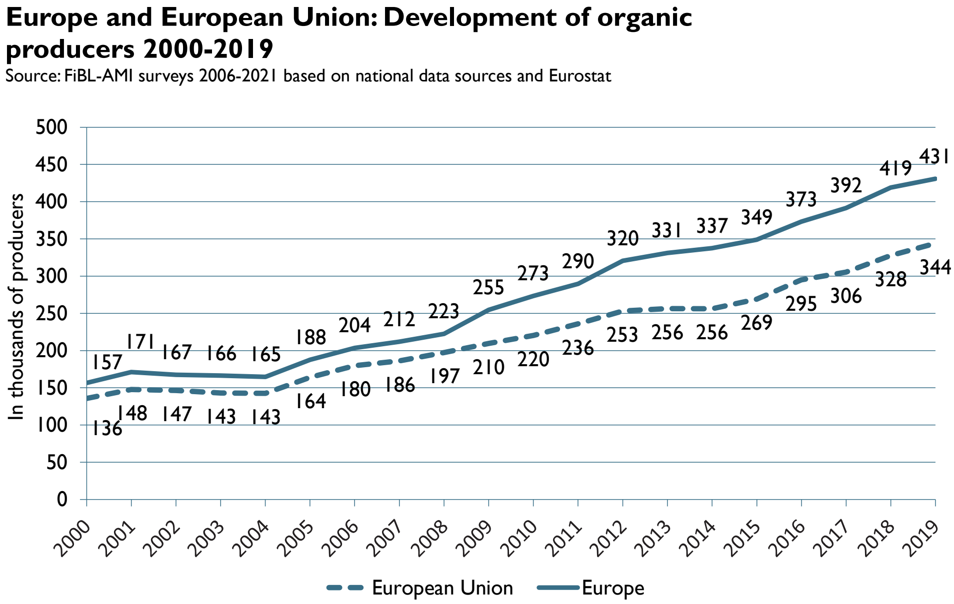
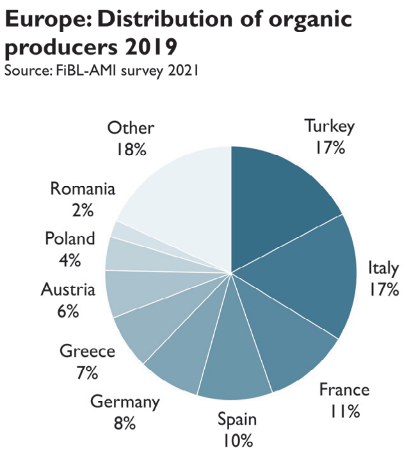


Figure 81: Europe and the European Union: Development of the number of organic producers in 2000-2019

Source: FiBL-AMI surveys 2006-2021 based on national data sources and Eurostat



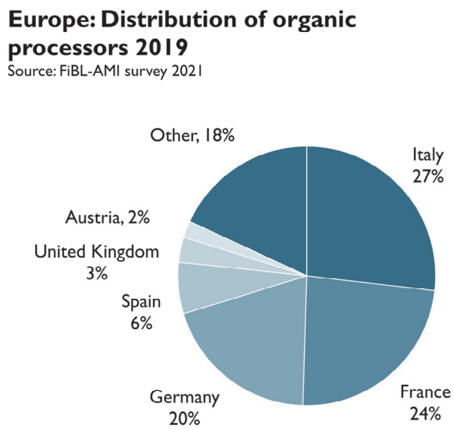


Figure 82: Europe: Distribution of organic producers and processors by country 2019

Source: FiBL-AMI survey 2021, based on national data sources and Eurostat.

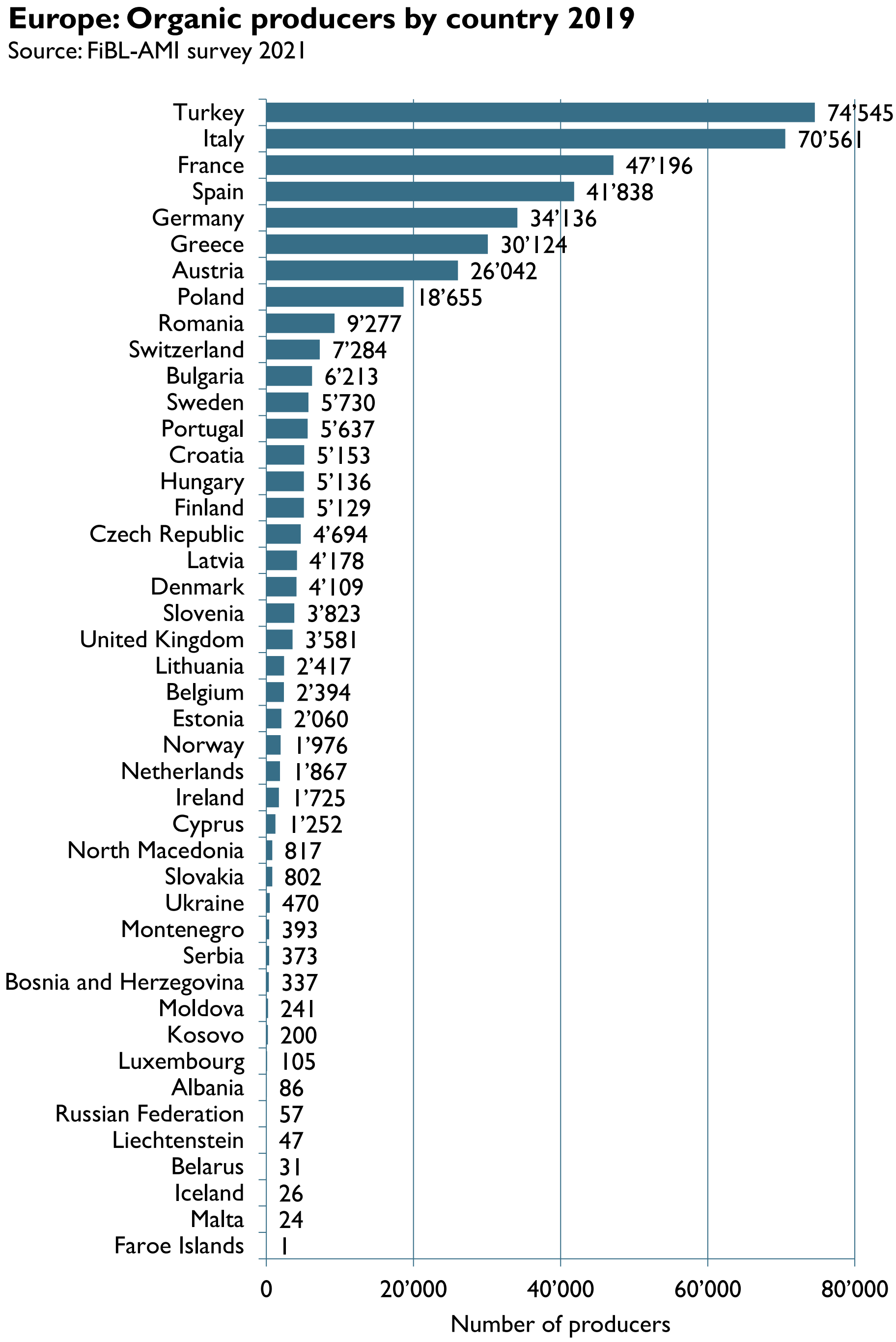


Figure 83: Europe: Number of organic producers by country 2019

Source: FiBL-AMI survey 2021 based on national data sources and Eurostat. For detailed data sources see annex.

6 Organic retail sales

In 2019, the organic market in Europe grew to 45.0 billion euros (European Union: 41.4 billion euros). Unfortunately, not all countries provide data on their domestic markets on a regular basis (Table 72), and it may be assumed that the market is larger than indicated by the figures in Table 64 and Table 72.

Table 64: Europe and the European Union: Organic retail sales 2019: Key data

	Retail sales [Million €]	Per capita consumption [€]	Growth 2018-2019 [%]	Growth 2010-2019 [%]
Europe	45'049	84.0	8.0%	129.9%
European Union	41'453	55.8	8.0%	131.6%

Source: FiBL-AMI survey 2021 based on national data sources. For country details, see annex.

6.1 Size of the organic market

Germany continues to be the largest market in Europe (12.0 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 11.3 billion euros. Comparing organic markets by single market, the United States has the lead. 43 percent of global retail sales of organic products are in the United States (44.7 billion euros), followed by the European Union (41.4 billion euros; 39 percent of organic global retail sales, Figure 84). Comparing retail sales by continent, North America, with 45.5 percent of the world's organic retail sales, is the largest market (48.2 billion euros).

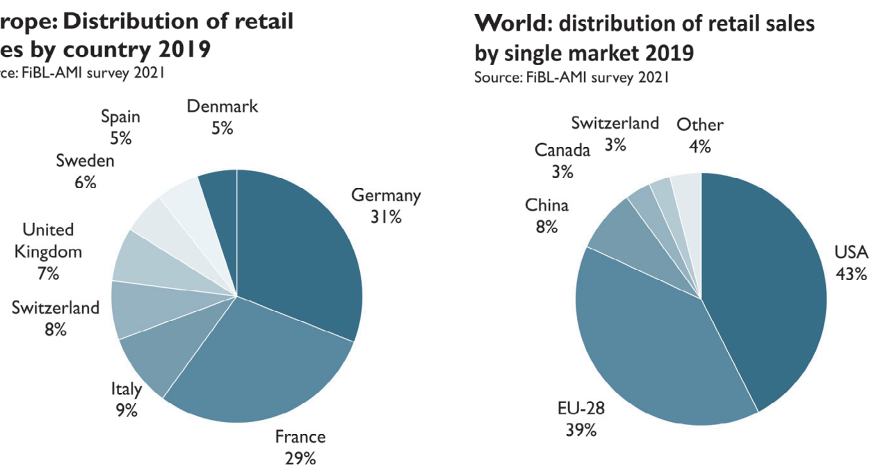


Figure 84: Europe: Distribution of retail sales by country and by single market worldwide 2019

Source: FiBL-AMI survey 2021 based on national data sources

Europe: Organic retail sales value by country 2019
Source: FiBL-AMI survey 2021

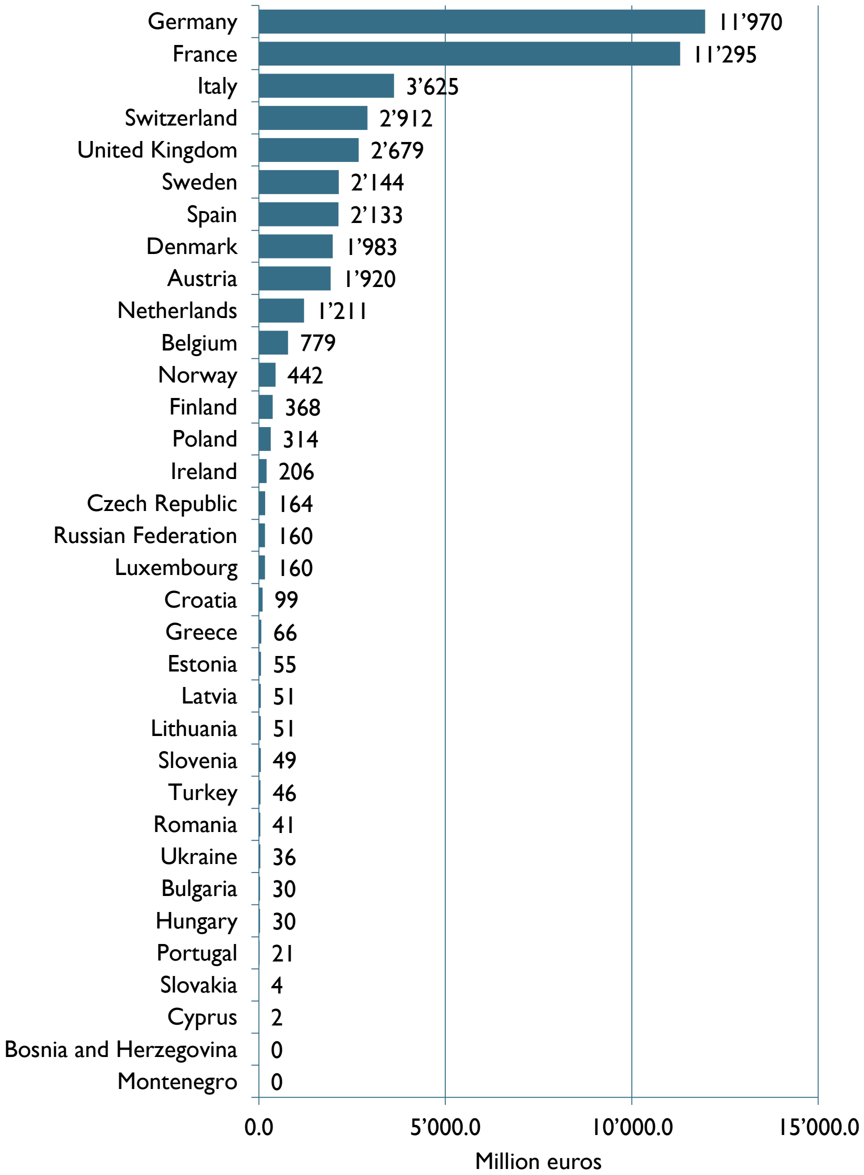


Figure 85: Europe: Retail sales by country 2019

Source: FiBL-AMI survey 2021 based on national data sources (only countries with a turnover of more than one million euros). Please note that 2019 data were not available for all countries. For detailed data sources, see annex.

6.2 Growth of the organic market

The organic market grew in Europe and the EU by 8.0 percent. From 2010 to 2019, the organic market more than doubled in size (Figure 86).

All countries for which new data were available showed growth, some in the double-digits (Figure 87). With 13.4 percent, France showed the highest increase, followed by Estonia and Belgium (Figure 87, Table 72).

In the United Kingdom, where retail sales decreased for a couple of years in the previous decade, growth was noted again (4.8 percent increase in 2019). It should be noted that UK sales in euros show a drop for 2015-2017 due to the British pound's exchange rate loss after the Brexit vote.

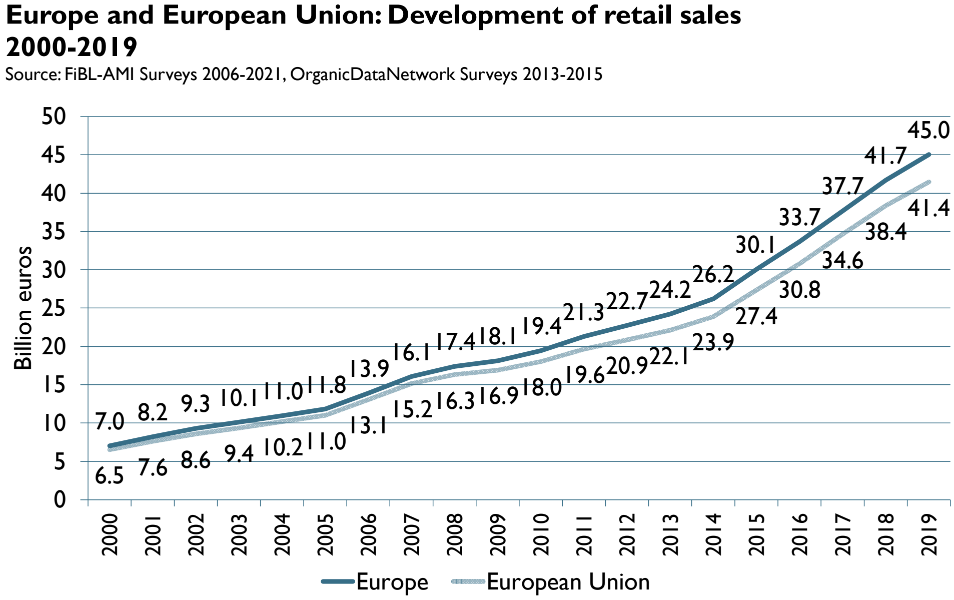


Figure 86: Europe: Growth of organic retail sales in Europe and the European Union, 2000-2019

Source: FiBL-AMI surveys 2004-2021, and OrganicDataNetwork Surveys 2013-2015

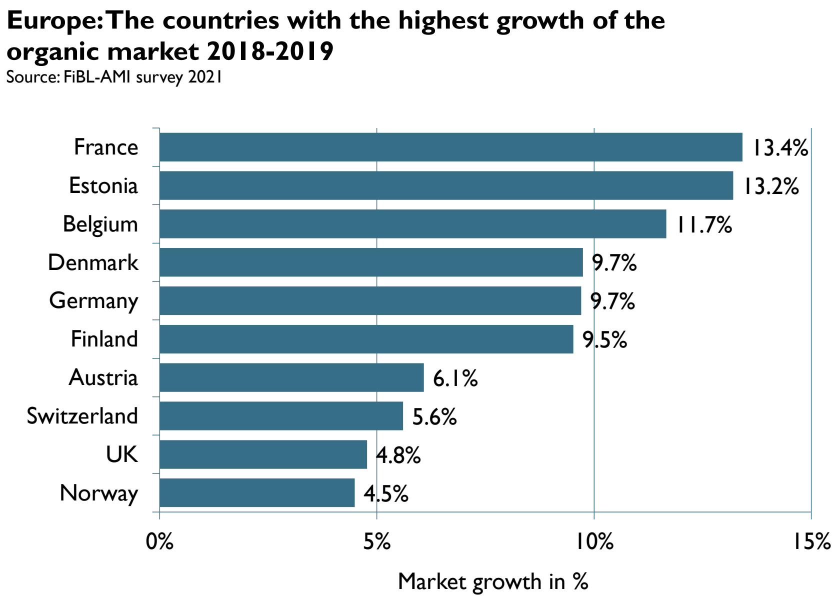


Figure 87: Europe: The countries with the highest organic market growth 2019

Source: FiBL-AMI surveys 2021. 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 Denmark (344 euros) and Switzerland (338 euros). Seven countries had a per capita consumption of more than 100 euros in 2019 (Figure 88, Table 72).

The continual growth in consumer interest is well documented by the development of per capita consumption, with specific notable increase in 2019 (Figure 89). The per capita consumption in Europe rose to 56 euros and to 84 euros in the European Union.

In Central Eastern European countries, consumer spending is still low (Table 72). 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.

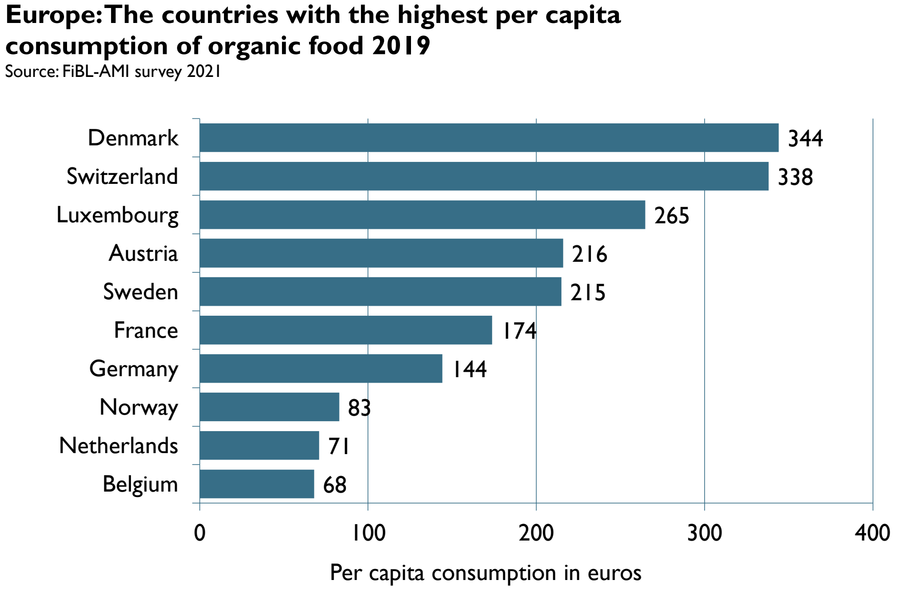


Figure 88: Europe: The countries with the highest per capita consumption 2019

Source: FiBL-AMI survey 2021 based on national data sources. For detailed data sources see annex.

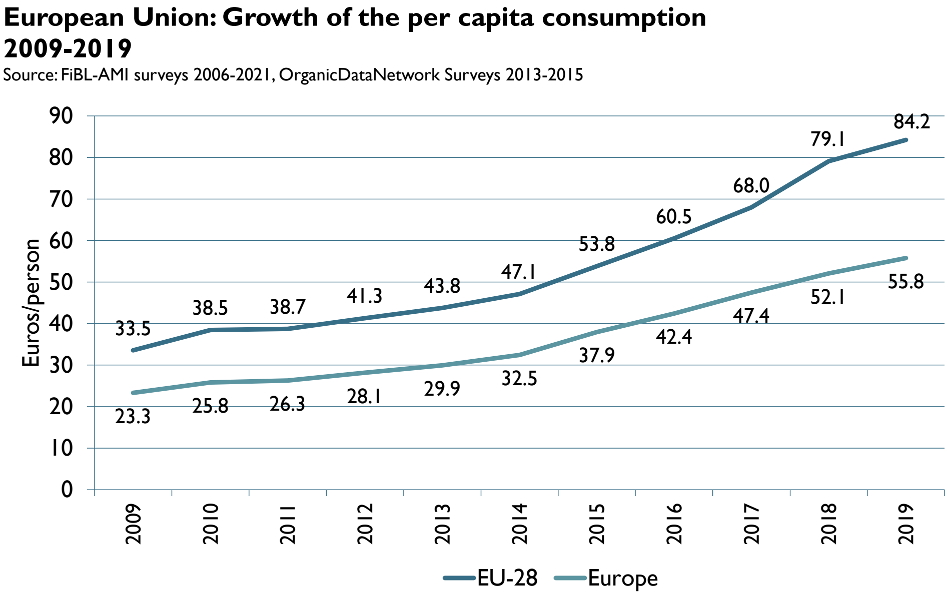


Figure 89: Europe: Growth of the per capita consumption 2010-2019

Source: FiBL-AMI survey 2021 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 of the organic market in a given country. As in the past, the highest market shares were reached in Denmark (12.1 percent, highest organic market share in the world), Switzerland (10.4 percent) and Austria (9.3 percent) (Figure 90, Table 72).

In many countries, the total food market is not growing, and, in many cases, food prices are decreasing, which make organic shares grow even faster. Market shares of individual products and product groups can be far higher; these data are provided in Table 65.

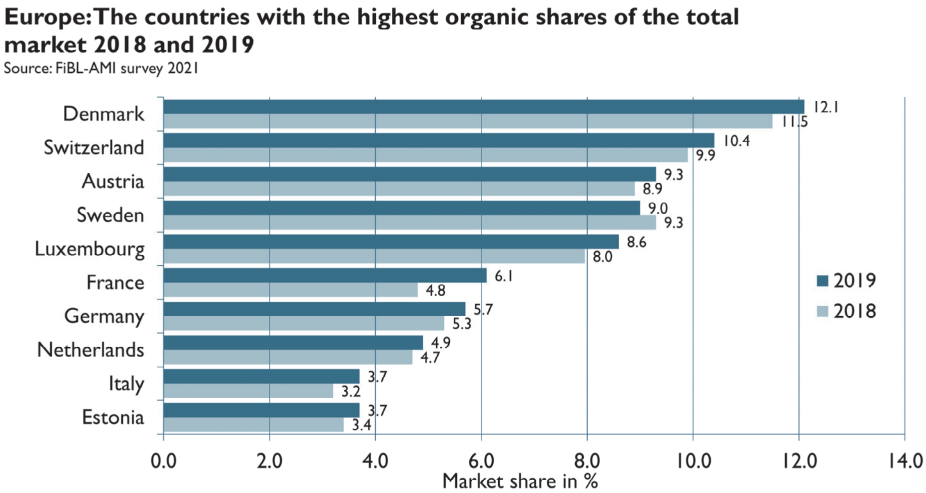


Figure 90: Europe: The countries with the highest shares of the total retail sales 2019

Source: FiBL-AMI survey 2021 based on national data sources. For detailed data sources see annex.

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 entire egg market. Table 65 shows that, in Denmark and France, eggs reach organic market shares of approximately 30 percent (in value).

Table 65: Organic shares for retail sales values (euros) for selected products 2019

	Austria	Belgium (2018)	Czech Republic (2018)	Denmark	Finland	France	Germany	Italy	Netherlands (2018)	Norway (2018)	Spain (2017)	Sweden (2017)	Switzerland	UK
Baby food					23.0	26.9		4.8		33.1				55.4
Beverages			0.4	14.4 (juice)		5.5		3.0		0.5		5.6	4.0	
Bread & bakery products		4.5	0.4			5.3	7.4	4.0	2.6	2.1		3.5	26.1	0.3
Eggs	22.1	18.2		29.6	18.0	37.2	20.6	19.8	15.9	9.5	2.9		28.7	8.8
Fish and fish products		0.6				3.1			1.3	1.5	0.6	12.9		1.1
Fresh vegetables	16.0				4.5	7.6	9.8	4.7		4.2	3.3	12.2	23.1	4.3
Fruit	11.0				7.5	8.8	7.5	6.6		2.2	1.7	18.4	17.5	2.8
Vegetables and fruit	13.6		1.3			8.2		7.7	5.8				20.3	0.5
Meat and meat products	3.8		0.2	8.0 (beef)		3.2	2.9	2.9	4.7	0.5	1.2	2.9	6.2	1.5
Milk and dairy products	12.4		1.4			5.8	8.5	3.6	5.6	2.1	1.1	10.4	11.0	3.5
- Butter	11.2	4.7		16.8		7.4	4.5	2.8		3.1				
- Cheese	10.3			6.8		2.6	4.7	1.0		0.7			7.6	1.1
- Milk	21.8	3.3		32.3	4.5	15.7	12.4	8.1		4.4			24.9	5.5
- Yoghurt	23.7	10.1				9.1	8.2	6.1		0.7				7.8

Sources: FiBL-AMI survey 2021, 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, for some products supermarket sale ; Germany: Agricultural Market Information Company AMI based on GfK; Italy: supermarkets and discounters only, data provided by tMarche Polytechnic University; 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.

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 a market share of 30 percent. Individual products can reach even higher market shares. Organic oatmeal (over 52 percent in Denmark) or organic milk substitutes (61 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. These products are often 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. Wherever possible, the figure for catering sales was deducted from the figure for the total organic market (Table 72). 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 specialised retailers play a significant role, even though their importance is decreasing, as shown in Figure 92.

In Germany, supermarkets have become the driving force in the market, whereas specialised retailers face more and more competition. While in 2014, 33 percent of all organic products were sold in organic food shops, this number decreased to 26.6 percent in 2019. Supermarket chains have founded partnerships with organic associations and sell products with their brands. Best examples are the Bioland-Lidl, the Naturland-Rewe, or the Demeter-Kaufland partnerships. These partnerships open *possibilities* for farmers and processors to market domestic products.

Austria and Switzerland have once again developed very dynamically. In both countries, food retail chains have been heavily involved in organic market development from the very beginning - both countries have shares of approximately 80 percent. There is close cooperation between the retail chains and the respective organic associations, Bio Austria and Bio Suisse, and the supermarket chains have helped develop the trademarks. Coop and Migros in Switzerland have been promoting and developing projects for years, for example on biodiversity, seasonality and horn-bearing cows.

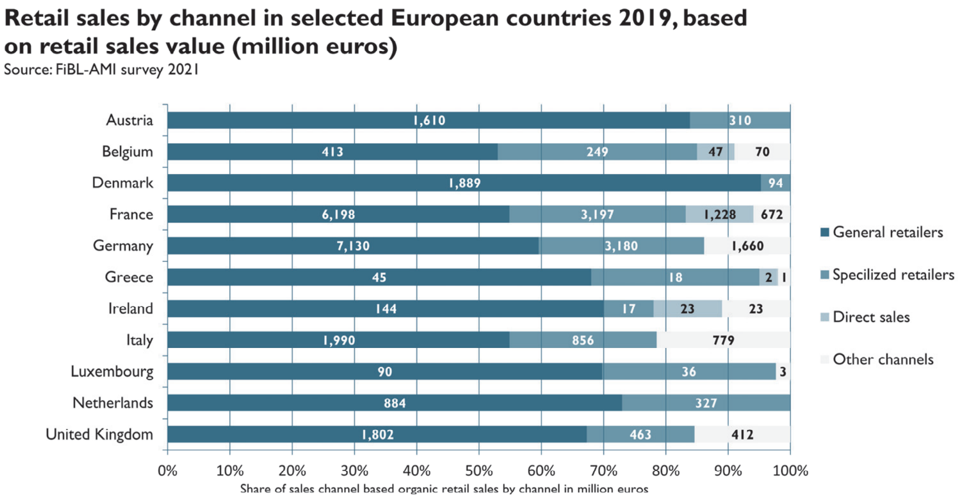


Figure 91: Europe: Marketing channels for organic products in selected countries 2019

Source: FiBL-AMI survey 2021 based on national data sources.
For detailed data sources see annex.

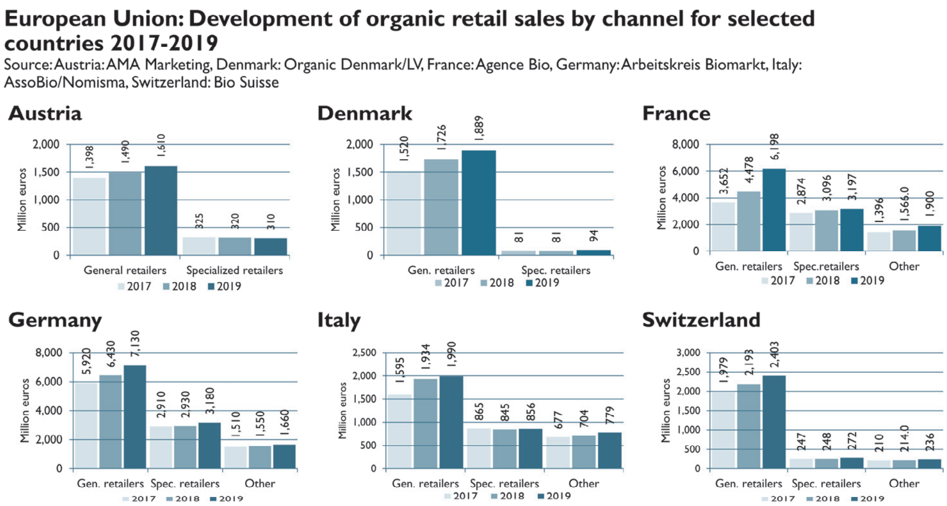


Figure 92: Europe: Growth of marketing channels for organic products 2017-2019 in selected countries

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

6.7 Organic imports

The European Union, which is the second-biggest organic market, provided data on its organic imports, showing, for the second time, the key import products and key importing countries (based on volume in metric tons). In 2019, the EU imported a total of 3.2 million tonnes of organic agri-food products. Imports of tropical fruit (fresh or dried), nuts and spices represented the single biggest category, totalling 885’930 tonnes or 27.3 percent of total imports, followed by oilcakes, cereals other than wheat, as well as rice, and wheat. China is the biggest supplier of organic agri-food products to the EU, with 433’705 tonnes; that is 13.4 percent of the total organic import volume. For more information, see the contribution about EU organic imports on page 140.

6.8 Impact of COVID-19 on the organic market

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. People stay at home to eat most of the time, and out-of-home meals are reduced to a minimum. On the other hand, in general, food sales in supermarkets have increased rapidly, for example in Germany, an increase of more than ten percent has been observed since the beginning of the pandemic. Organic food sales have accelerated even faster. When consumers have the choice, which they don’t have in canteens and restaurants, they reach more often for organic products, for example, the organic market in Germany in 2020 growth was double as strong as the general food market. Health, environment, and climate change have become big issues among the population – even more in the pandemic. Consuming organic food is a possibility to afford something good, at times, when travelling, restaurant and theatre visits are not possible. And supermarkets, as well as natural food stores and direct marketers, fulfil consumers desire for healthier, more regional, and organic products.

Many shops have become inventive in selling food, adapting to the consumers' preference to not leave the home, or not go too far for shopping. Online-sales such as subscription boxes for organic have grown tremendously and other forms of contactless shopping such as ‘Click and Collect’.

Will this development in the organic sector continue once the pandemic is over? Most experts see at least a similar sales level, as people’s awareness of organic and environmental and health issues will remain. Decreasing incomes in some population groups can reduce retail sales, but this was not observed until now.

On the agricultural side: with the growing market, organic production and processing need grow at the same level, like the market. Up to now, small and medium-sized enterprises have dominated the organic processing. They will need to grow, or new enterprises have to enter the market. Especially intensive crop production and animal production and the processing of these products are needed. The European Union’s Farm to Fork-strategy can support this development with several measures.

7 Conclusion

Available data on organic farming in the global and European market shows 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 and a fast-growing market, show the exceptional dynamics that the European organic market and sector has.

In the past years, in many countries, the organic market was growing faster than production, and domestic supply can still not meet demand. Therefore, many organic organisations or market actors are calling for more farmers to convert to organic – and the effects of these efforts are now visible, with production growing at the same pace as the market. Now more processing, storing and distribution facilities are needed to process larger amounts of raw products.

While the COVID19 pandemic has shown that there is a potential for the organic market to expand faster, recent calculations by FiBL, based on past trends, indicate that data availability and quality remain an issue when it come to forecasting trends. International trade data remain scarce. Therefore, a major development is the new European import statistics, which show the products and the major exporting countries targeting the European Union for the second time (European Commission 2019 and 2020). The availability of these statistics is an important step towards making it possible to compare production data on organic agriculture worldwide with international trade data, which could give important hints on potential fraud cases.

Furthermore, while domestic market data availability 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. Thus, little is known about the importance of organic product sales. Therefore, we recommend that data availability and accessibility increase, that classifications, nomenclature, and definitions, particularly for organic market data, are harmonised, and data quality is improved.

8 Acknowledgements

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] The authors would like to thank all of those who have provided data and information for this report, particularly the OrganicDataNetwork project partners.

Data collection was expanded in the framework of a project by IFOAM Organics Europe, which allowed us to further develop our interactive infographics and make progress on forecasting the development of the organic area and market.

[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.

References and further reading

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Note on data collection and countries covered

Like in the rest of the world, data collection in Europe is carried out using multiple information sources. However, we would like to point out that Eurostat, the European Union's statistical office, 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.

This article focusses on organic farming and market statistics in Europe and includes:

› the 28 Member States of the European Union, which consist of the EU-13 countries that became members of the European Union in or after May 2004, and the EU-15 countries, who were member countries of the European Union before the accession of ten candidate countries on May 1, 2004. The United Kingdom is still counted as an EU member for 2019 data.

› The EU Candidate and Potential Candidate countries (CPC): Albania, Bosnia-Herzegovina, Kosovo, North Macedonia; Montenegro, Serbia, Turkey),

› the members of the European Free Trade Association (EFTA): Iceland, Norway, Liechtenstein, Switzerland,

› Other European countries: Andorra, Belarus, Moldova, Russian Federation, San Marino and Ukraine.

Organic Agriculture in Europe: Tables

Table 66: Europe: Organic agricultural land by country 2019

Country	Organic area [ha]	Organic share [%]	Change 2018-19 [%]	Change 2010-19 [%]	Change 2018-19 [ha]
Albania	653	0.1%	-12.5%	129.9%	-94
Andorra	2	0.0%	0.0%	0.0%	0
Austria	669'921	26.1%	5.0%	17.9%	32'116
Belarus	1'375	0.0%	1.0%	N/A	14
Belgium	93'119	6.9%	4.6%	57.2%	4'094
Bosnia and Herzegovina	1'692	0.1%	88.8%	191.7%	796
Bulgaria	117'779	2.3%	-8.6%	359.2%	-11'074
Channel Islands	180	2.0%	0.0%	-50.0%	0
Croatia	108'127	7.2%	4.8%	363.0%	4'961
Cyprus	6'240	5.0%	3.6%	74.5%	218
Czech Republic	540'986	15.4%	0.4%	20.7%	2'093
Denmark	285'526	10.9%	11.2%	75.3%	28'815
Estonia	220'737	22.3%	6.8%	95.4%	14'147
Faroe Islands	251	8.4%	0.0%	-0.7%	0
Finland	306'484	13.5%	3.0%	81.2%	9'042
France	2'240'797	7.7%	10.1%	165.0%	205'773
Germany	1'613'785	9.7%	7.7%	62.9%	92'471
Greece	528'752	8.7%	7.3%	70.7%	36'125
Hungary	303'190	5.7%	44.8%	137.6%	93'808
Iceland	5'740	0.4%	-76.9%	-1.1%	-19'115
Ireland	73'952	1.6%	-37.7%	54.5%	-44'747
Italy	1'993'225	15.2%	1.8%	79.0%	35'180
Kosovo	1'036	0.2%	547.5%	N/A	876
Latvia	289'796	14.8%	3.4%	74.2%	9'413
Liechtenstein	1'470	41.0%	4.0%	44.1%	57
Lithuania	242'118	8.1%	1.0%	68.6%	2'427
Luxembourg	5'814	4.4%	0.6%	56.3%	32
Malta	55	0.5%	16.5%	129.2%	8
Moldova	27'833	1.2%	62.3%	-13.3%	10'682
Montenegro	4'751	1.8%	6.7%	33.4%	297
Netherlands	68'068	3.7%	6.7%	47.2%	4'259
North Macedonia	3'711	0.3%	-15.8%	-89.4%	-698
Norway	45'312	4.6%	-2.3%	-20.8%	-1'065
Poland	507'637	3.5%	4.7%	-2.7%	22'961
Portugal	293'213	8.2%	37.6%	45.8%	80'095
Romania	395'228	2.9%	21.1%	116.3%	68'968
Russian Federation	674'370	0.3%	11.1%	1432.1%	67'395
Serbia	21'266	0.6%	10.4%	146.3%	2'011
Slovakia	197'565	10.3%	4.5%	13.2%	8'579
Slovenia	49'638	10.3%	3.7%	61.7%	1'790
Spain	2'354'916	9.7%	4.8%	61.7%	108'441
Sweden	613'964	20.4%	0.9%	40.0%	5'206
Switzerland	172'713	16.5%	7.3%	54.9%	11'721
Turkey	518'435	1.4%	-19.8%	35.1%	-127'812
Ukraine	467'980	1.1%	51.4%	73.2%	158'880
United Kingdom	459'275	2.6%	0.4%	-34.4%	1'898
Europe	**16'528'677**	**3.3%**	**5.9%**	**64.8%**	**921'042**
European Union	**14'579'907**	**8.1%**	**5.9%**	**60.7%**	**817'097**

Source: *FiBL-AMI survey 2021 based on Eurostat and national data sources. For data sources, see annex.*

Table 67: Europe: Conversion status of organic agricultural land 2019

Country	Area [ha]	Fully converted [ha]	Conversion area [ha]
Albania	653	528	92
Andorra	2	2	
Austria	669'921		
Belarus	1'375		
Belgium	93'119	78'323	14'796
Bosnia and Herzegovina	1'692	1'279	413
Bulgaria	117'779	95'555	22'225
Channel Islands	180	180	
Croatia	108'127	77'469	30'658
Cyprus	6'240	5'382	858
Czech Republic	540'986	485'174	49'241
Denmark	285'526	211'685	73'841
Estonia	220'737	192'976	27'761
Faroe Islands	251	251	
Finland	306'484	257'317	49'167
France	2'240'797	1'675'226	565'571
Germany	1'613'785		
Greece	528'752	385'782	142'970
Hungary	303'190	185'227	117'963
Iceland	5'740	5'725	15
Ireland	73'952		
Italy	1'993'225	1'610'099	383'127
Kosovo	1'036	1'002	34
Latvia	289'796	262'105	27'691
Liechtenstein	1'470		60
Lithuania	242'118	227'349	14'769
Luxembourg	5'814	5'180	634
Malta	55	40	15
Moldova	27'833	20'736	7'097
Montenegro	4'751	4'049	703
Netherlands	68'068	63'200	4'868
North Macedonia	3'711	2'904	1'801
Norway	45'312	82'838	4'160
Poland	507'637	390'274	117'363
Portugal	293'213	273'158	20'055
Romania	395'228	211'487	183'741
Russian Federation	674'370	308'595	13'268
Serbia	21'266	13'726	7'539
Slovakia	197'565	177'921	19'644
Slovenia	49'638	44'455	5'183
Spain	2'354'916	2'008'294	346'622
Sweden	613'964	555'788	58'176
Switzerland	172'713		
Turkey	518'435	358'647	159'787
Ukraine	467'980	384'529	83'451
United Kingdom	459'275	432'766	26'509
Europe	**16'528'677**	**11'097'224**	**2'581'867**
European Union	**14'579'907**	**9'912'232**	**2'303'448**

Source: *FiBL-AMI survey 2021 based on Eurostat and national data sources. For data sources, see annex.*

Table 68: Europe: Land use in organic agriculture by country 2019

Country	Arable land crops [ha]	Permanent crops [ha]	Permanent grassland [ha]	Total [ha]
Albania	566	87		653
Andorra		2		2
Austria	270'786	11'391	387'744	669'921
Belarus	1'084	47	80	1'210
Belgium	31'789	1'418	58'123	91'331
Bosnia and Herzegovina	1'532	159		1'691
Bulgaria	63'940	26'486	27'339	117'765
Croatia	52'586	14'893	40'648	108'127
Cyprus	3'041	3'027	172	6'240
Czech Republic	87'717	5'654	441'044	534'414
Denmark	235'178	3'252	47'096	285'526
Estonia	120'467	2'549	97'721	220'737
Faroe Islands	1		250	251
Finland	303'882	678	1'924	306'484
France	1'255'369	167'041	818'387	2'240'797
Germany	700'000	23'000	830'000	1'613'785
Greece	179'003	70'200	279'549	528'752
Hungary	103'887	14'520	184'783	303'190
Iceland	629	2	5'110	5'741
Ireland	4'319	64	69'323	73'706
Italy	961'692	480'459	551'074	1'993'225
Kosovo	1'002	34		1'036
Latvia	150'567	3'003	136'226	289'796
Liechtenstein	244	8	1'136	1'388
Lithuania	150'816	5'387	85'915	242'118
Luxembourg	2'630	201	2'983	5'814
Malta	28	27		55
Moldova	23'256	4'577		27'833
Montenegro	319	508	3'925	4'752
Netherlands	27'306	825	39'937	68'068
North Macedonia	3'051	657		3'708
Norway	36'504	335	8'473	45'312
Poland	375'740	31'924	99'973	507'637
Portugal	55'675	61'196	176'342	293'213
Romania	257'665	22'143	115'420	395'228
Russian Federation	573'872	36	11'071	584'978
Serbia	10'647	5'268	5'350	21'265
Slovakia	68'022	1'797	127'746	197'565
Slovenia	6'521	3'089	40'028	49'638
Spain	494'213	606'406	1'254'296	2'354'915
Sweden	476'981	610	136'372	613'963
Switzerland	41'075	3'108	125'452	169'636
Turkey	321'166	182'473	14'796	518'435
Ukraine	194'631	4'302	4'164	467'980
United Kingdom	148'629	5'161	305'472	459'262
Europe	**7'797'978**	**1'768'035**	**6'535'444**	**16'528'677**
European Union	**6'588'400**	**1'566'432**	**6'355'637**	**14'579'907**

Source: FiBL-AMI survey 2021 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 69: Europe: Organic agricultural land and wild collection areas by country 2019

Country	Agricultural land [ha]	Wild collection [ha]	Total [ha]
Albania	653	645'042	645'695
Andorra	2		2
Austria	669'921		669'921
Belarus	1'360	946'897	948'259
Belgium	93'119	3	93'121
Bosnia and Herzegovina	1'692	11'579	13'271
Bulgaria	117'779	307'020	424'799
Channel Islands	180		180
Croatia	108'127		108'127
Cyprus	6'240		6'240
Czech Republic	540'986		540'986
Denmark	285'526	2'648	288'174
Estonia	220'737	104'305	325'042
Faroe Islands	251	0	251
Finland	306'484	4'600'000	4'906'484
France	2'240'797		2'240'797
Germany	1'613'785		1'613'785
Greece	528'752	317'053	845'805
Hungary	303'190		303'190
Iceland	5'741		5'741
Ireland	73'952		73'952
Italy	1'993'225		1'993'225
Kosovo	1'036	179'580	180'616
Latvia	289'796		289'796
Liechtenstein	1'470		1'470
Lithuania	242'118		242'118
Luxembourg	5'814		5'814
Malta	55		55
Moldova	27'833	1'845	29'678
Montenegro	4'752	143'410	148'161
Netherlands	68'068		68'068
North Macedonia	3'708	556'600	560'308
Norway	45'312		45'312
Poland	507'637		507'637
Portugal	293'213	40'000	352'746
Romania	395'228	1'787'548	2'182'776
Russian Federation	673'689	158'052	833'676
Serbia	21'265		21'265
Slovakia	197'565		197'565
Slovenia	49'638	13'238	62'876
Spain	2'354'916	38'184	2'393'100
Sweden	613'964		613'964
Switzerland	172'573		172'573
Turkey	518'435	180'336	698'771
Ukraine	467'980	580'000	1'047'798
United Kingdom	459'275		459'275
Europe	**16'528'677**	**10'613'341**	**27'162'468**
European Union	**14'579'907**	**7'209'999**	**21'789'906**

Source: FiBL-AMI survey 2021 based on Eurostat and national data sources. For data sources, see annex.

Table 70: Europe: Organic livestock by country 2019

Country	Bovine animals		Pigs		Poultry		Sheep	
	No	Share (%)	No	Share (%)	No	Share (%)	No	Share (%)
Austria	420'693	21.3%	74'603	2.5%	2'840'750	16.8%	123'541	34.2%
Belarus		0.0%		0.0%		0.0%		0.0%
Belgium	107'690	4.3%	17'081	0.3%	4'592'154	12.7%	27'349	22.9%
Bulgaria	9'402	1.7%	91	0.0%	2'260	0.0%	22'780	1.6%
Croatia	21'558	4.8%	2'873	0.2%	1'523	0.0%	65'632	9.7%
Cyprus	731	1.3%		0.0%	21'233	0.7%	971	0.3%
Czech Republic	262'910	19.4%	2'707	0.2%	54'174	0.3%	87'863	39.8%
Denmark	224'348	14.0%	490'924	4.0%	3'349'215	22.8%	11'435	7.4%
Estonia	42'290	17.2%	683	0.2%	36'315	1.7%	32'504	42.3%
Finland	76'173	8.4%	5'156	0.4%	335'538	5.3%	32'883	25.3%
France	830'921	4.4%	437'950	3.2%	22'713'723	10.6%	737'091	9.9%
Germany	894'460	18.3%	183'850	0.9%	10'209'000	7.8%	159'000	12.2%
Greece	142'609	20.8%	8'782	0.8%	252'280	0.8%	1'299'677	13.6%
Hungary	54'014	7.7%	10'972	0.4%	131'367	0.3%	11'801	1.1%
Iceland	284	0.4%		0.0%		0.0%	1'241	0.3%
Ireland	61'819	0.9%	642	0.0%	161'816	1.0%	83'302	1.6%
Italy	375'414	6.0%	59'623	0.6%	3'482'435	2.1%	680'369	8.6%
Latvia	99'041	26.0%	1'925	0.5%	45'296	1.0%	37'759	47.2%
Liechtenstein	1'618	25.7%	70	4.0%	3'414		1'230	32.4%
Lithuania	58'356	7.8%	131	0.0%	10'108	0.1%	23'076	38.2%
Luxembourg	4'814	2.6%	1'026	1.1%	33'982	30.1%	837	10.2%
Montenegro	578	0.7%		0.0%	160	0.0%	1'787	0.9%
Netherlands	71'817	1.9%	106'458	0.9%	3'926'491	4.1%	15'129	1.5%
North Macedonia	6'390	2.5%		0.0%		0.0%	101'317	13.8%
Norway	7'932	0.9%	2'820	0.3%	611'427	13.1%		0.0%
Poland	30'186	0.5%	4'189	0.0%	484'153	0.4%	22'757	8.5%
Portugal	95'306	6.4%	6'757	0.3%	64'630	0.1%	94'117	4.5%
Romania	19'358	1.0%	9	0.0%	128'596	0.1%	19'367	0.2%
Russia	1'874	0.0%		0.0%		0.0%	1'332	0.0%
Serbia	3'594	0.4%	284	0.0%	6'735	0.0%	5'138	0.3%
Slovakia	61'432	13.3%	642	0.1%	5'863	0.1%	93'875	23.8%
Slovenia	37'126	8.0%	3'252	0.9%	96'641	4.3%	35'225	29.4%
Spain	215'802	3.7%	32'343	0.1%	1'826'581	1.3%	594'875	3.6%
Sweden	333'245	22.2%	36'649	2.7%	1'395'620	16.6%	119'166	19.5%
Switzerland	205'389	13.5%	38'955	2.9%	1'184'263	9.9%	86'679	25.2%
Ukraine	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
United Kingdom	300'788	3.0%	55'255	1.2%	3'465'009	2.2%	782'253	2.4%
Europe	**5'079'962**	**4.0%**	**1'586'702**	**0.9%**	**62'317'071**	**2.5%**	**5'413'520**	**3.5%**
European Union	**4'852'303**	**6.0%**	**1'544'573**	**1.1%**	**59'666'753**	**4.2%**	**5'214'634**	**5.3%**

Source: FiBL survey 2021 based on Eurostat and national data sources. For data sources, see annex.
Note: 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. Therefore, adding up the data for pigs and poultry over all countries is not completely reliable, and country data are not necessarily comparable. Therefore, the data presented here should be treated with caution and only approximate the overall picture.

Table 71: Europe: Organic producers, processors, and importers by country 2019

Country	Producers	Processors	Importers	Exporters
Albania	86	8		25
Andorra		3		
Austria	26'042	1'691	58	4
Belarus	31	24		7
Belgium	2'394	1'585	304	153
Bosnia and Herzegovina	337	74		20
Bulgaria	6'213	234	26	4
Croatia	5'153	395	22	3
Cyprus	1'252	61	14	
Czech Republic	4'694	802	311	163
Denmark	4'109	1'092	94	99
Estonia	2'060	173	38	16
Faroe Islands	1	1		
Finland	5'129	399	63	20
France	47'196	19'311	662	
Germany	34'136	16'162	1'831	1'288
Greece	30'124	1'642	44	52
Hungary	5'136	523	44	
Iceland	26	20	2	
Ireland	1'725	26	24	2
Italy	70'561	21'940	527	741
Kosovo	200	35		8
Latvia	4'178	51	10	0
Liechtenstein	47			
Lithuania	2'417	124	3	
Luxembourg	105	101	7	
Malta	24	7	14	
Moldova	241	21	3	52
Monaco		2		
Montenegro	393	11		
Netherlands	1'867	1'021	462	120
North Macedonia	817	23	5	7
Norway	1'976	428	94	
Poland	18'655	636	238	256
Portugal	5'637	933	41	34
Romania	9'277	191	24	15
Russian Federation	57	39		14
San Marino		2		
Serbia	373	123	51	3
Slovakia	802	85	22	1
Slovenia	3'823	142	27	
Spain	41'838	5'230	364	137
Sweden	5'730	1'117	257	19
Switzerland	7'284	1'289	548	18
Turkey	74'545	1'356	58	209
Ukraine	470	20		18
United Kingdom	3'581	2'566	216	
Europe	**430'742**	**81'719**	**6'508**	**3'508**
European Union	**343'858**	**78'240**	**5'747**	**3'127**

Source: FiBL-AMI survey 2021 based on Eurostat and national data sources. For data sources see annex.
**Total number includes data for countries with less than three operators.*

Table 72: Europe: The organic food market 2019

Country	Data year	Retail sales [Million €]	€/person [€]	Organic share [%]	One year growth [%]	Food-service [Million €]	Exports [Million €]
Austria	2019	1'920	216	9.3%	6.1%	140	
Belgium	2019	779	68	3.1%	11.7%		
Bosnia and Herzegovina	2017	0	0				
Bulgaria	2018	30					
	2019		4	0.4%			
Croatia	2018	99	24	2.2%			
Cyprus	2006	2	2	0.1%			
Czechia	2018	164	16	1.6%		8	
Denmark	2015						266
	2019	1'979	344	12.1%	9.7%	349	
Estonia	2019	62		3.7%	13.2%		17
Finland	2019	368	67	2.6%	9.5%		
France	2013						93
France	2019	11'295	174	6.1%	13.4%	639	
Germany	2009					300	
	2019	11'970	144	5.7%	9.7%		
Greece	2017	66	6	0.3%			
Hungary	2015	30	3	0.3%			
Ireland	2017	206	43	2.5%			
Italy	2019	3'625	60	3.7%	4.0%	667	
Latvia	2017	51	6	1.5%			
Lithuania	2017	51	18	1.0%		5	
Luxembourg	2018					6	
	2019	160	265	8.6%			
Montenegro	2010	0	0				
Netherlands	2019	1'211	71	4.9%	4.1%	330	
Norway	2016			1.7%			
Norway	2019	442	83		4.5%	30	
Poland	2019	314	8	0.6%			
Portugal	2011	21	2	0.2%			
Romania	2016	41	2	0.2%			
Russia	2012						4
	2018	160	1				
Serbia	2015						20
Slovakia	2010	4	1	0.2%			
Slovenia	2009					0	
	2013	49	/27	1.8%			
Spain	2017			2.8%		59	
	2018	2'133	47		12.1%		
Sweden	2018						117
	2019	2'144	215	9.0%	-3.8	519	
Switzerland	2019	2'912	338	10.4%	5.6%		
Turkey	2014	46	1				
Ukraine	2019	36	1				
UK	2019	2'679	40	1.8%	4.8%	112	
Europe		**45'049**	**55.8**		**8%**	**3'175**	**516**
European Union		**41'453**	**84.4**	**3.2%**	**8%**	**3'145**	**493**

Source: FiBL-AMI survey 2021. 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 2019 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.