Organic Farming and Market Development in Europe and the European Union

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In 2020, the organic sector's development in Europe was characterised by continued growth in all key indicators. In 2020, the organic market grew substantially more than the organic area, thus continuing the past several years' trend at an increased rate. A lot of this exceptional, often double-digit growth must be attributed to the pandemic. While it is good to see strong market growth, the organic farmland area must continue growing faster to reach the 25 percent organic area share goal by 2030, as set out by the European Commission (2020) in its Farm to Fork strategy.

Please note that the European Union (EU) data are not comparable to what was communicated in this yearbook's previous editions. All EU data (including historical data) in this volume refer to the EU 27, that is, the 27 countries that were member states of the EU in 2020.

1 Key facts and figures: Production and market highlights

More than 17 million hectares of farmland were organic in Europe in 2020 – France had the largest area

In Europe, 17.1 million hectares were managed organically in 2020 (EU: 14.9 million hectares). With almost 2.5 million hectares, France became the new number one in terms of farmland under organic management, followed by Spain (2.4 million hectares), Italy (2.1 million hectares) and Germany (1.7 million hectares). More than half of the European organic farmland is in these four countries.

European organic farmland increased by 0.7 million hectares

Organic land increased by more than 0.6 million hectares in Europe (with a major increase in farmland in France and Ukraine and a decrease in Turkey) and by more than 0.7 million hectares in the EU, representing an increase of 3.7 percent in Europe and 5.3 percent in the EU. Growth was lower than in the previous year. To achieve the EU's goal of 25 percent organic farmland by 2030, a higher annual growth rate is needed.

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

Organic farmland in Europe constitutes 3.4 percent of the total agricultural land and 9.2 percent in the EU. In Europe (and globally), Liechtenstein has the highest organic share of all farmland (41.6 percent), followed by Austria, the country in the EU with the highest organic share of agricultural land (26.5 percent). Furthermore, EU countries that

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are already quite close to the goal include Estonia (22.4 percent) and Sweden (20.4 percent).

Organic producers, processors and importers: Modest growth

There were almost 420’000 organic producers in Europe (almost 350’000 in the European Union), with the largest numbers in Italy (71’590). While the number of producers decreased by 2.5 percent in Europe (mainly due to fewer producers reporting from Turkey), it increased by a modest 3.3 percent in the European Union.

There were 84’799 organic processors in Europe (+3.8 percent compared to 2019) and 78’262 in the European Union (+3.4 percent). The country with the largest number of processors was Italy (22’689).

The number of importers grew faster than the number of producers and processors: Almost 6’800 importers (+5.2 percent) were counted in Europe and more than 5’800 in the European Union (+5.3 percent). Germany had the highest number of importers (1’916).

Retail sales passed the 50 billion euro mark – Extraordinary market growth

Organic retail sales in Europe were valued at 52.0 billion euros (44.8 billion euros in the European Union). The European Union represents the second-largest single market for organic products after the United States. With 14.99 billion euros in retail sales, Germany is the biggest market in Europe and the second-largest in the world.

The European and EU organic markets recorded a record growth rate of 15.0 percent – the highest in the last decade. The highest growth was observed in Germany (+22.3 percent). From 2011–2020, Europe’s and the European Union’s organic market values more than doubled.

European consumers spent 63.3 euros on organic food per person in 2020 (EU 101.8 euros). Per capita, consumer spending on organic food has doubled in the last decade. Swiss and Danish consumers spent the most on organic food (418 and 384 euros, respectively).

The 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 (13.0 percent). Austria reached 11.3 percent, and Switzerland reached 9.3 percent.

Organic imports – Ecuador is the largest supplier

Data on organic imports to the European Union in 2020 show that 2.8 million metric tons of organic products were imported. The largest supplier was Ecuador; the key product group was tropical fruits. The largest importer was the Netherlands.

2. Organic agricultural land: Area, organic share of total, growth

Table 59: Europe: Organic agricultural land in Europe and the European Union 2020

	Organic area [million ha]	Organic share [%]	Change 2019-2020 [%]	Change 2019-2020 [million ha]	Change 2011-2020 [%]	Change 2011-2020 [million ha]
European Union	14.9	9.2%	5.3%	+0.7	62.1%	7.5
Europe	17.1	3.4%	3.7%	+0.6	68.4%	6.0

Source: FiBL-AMI survey based on Eurostat and national data sources. For country details, see Table 65.

2.1 Organic agricultural land

In 2020, 17.1 million hectares were farmed organically in Europe and 14.9 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 farmland areas were France (15 percent of Europe's organic farmland and taking the lead from Spain), followed by Spain, Italy and Germany. Almost half of Europe's organic farmland (and almost 60 percent of the European Union's organic farmland) was in these countries (Figure 68). A bit more than one-fifth of the world's organic farmland was in Europe (22 percent). While in former years Europe held one-quarter of the global organic farmland, it went down due to an impressive area increase in Australia in 2017.

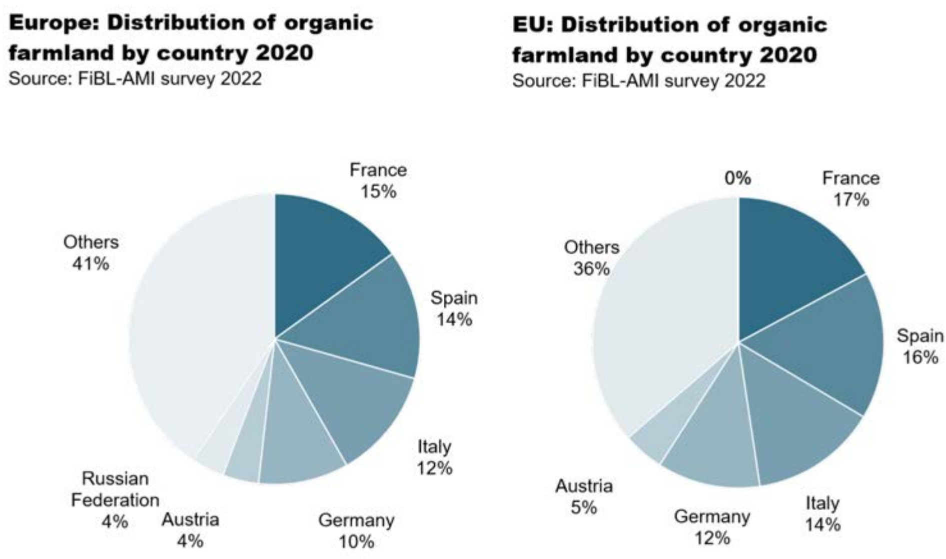


Figure 68: Europe and European Union: Distribution of organic farmland by country 2020

Source: FiBL-AMI survey 2022 based on national data sources and Eurostat
For detailed data sources, see annex

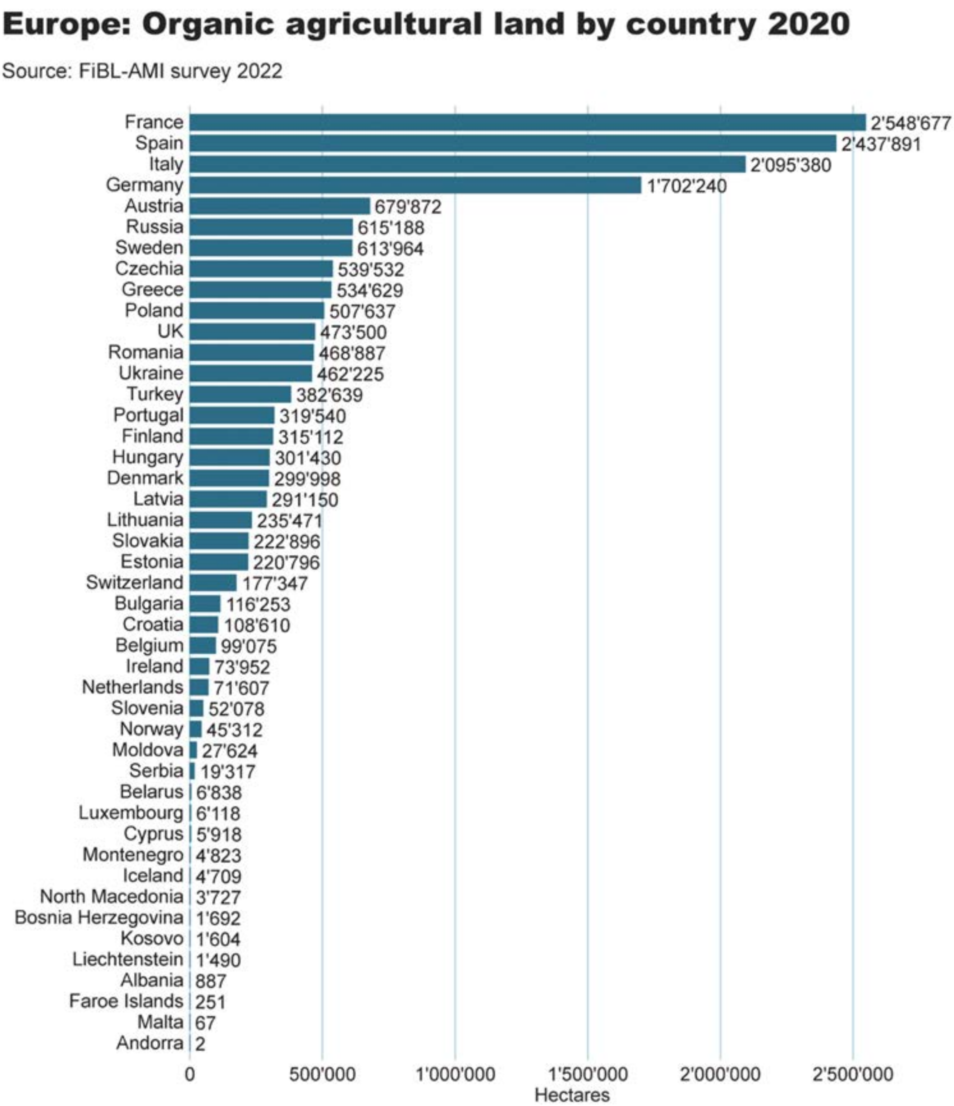


Figure 69: Europe: Organic agricultural land by country 2020

Source: FiBL-AMI survey 2022 based on Eurostat national data sources.
For detailed data sources, see annex.

2.2 Organic shares of total agricultural land

In Europe, 3.4 percent of the agricultural land was organic in 2020, and in the European Union (EU), 9.2 percent (Table 59). In fourteen countries (European Union: twelve), 10 percent or more agricultural land was managed organically (Figure 71). The countries with the highest organic area shares were Liechtenstein (41.6 percent), Austria (26.5 percent), Estonia (22.4 percent) and Sweden (20.4 percent)[1]. Liechtenstein is the country with the highest organic farmland share in the world.

2.3 Growth of organic agricultural land

In 2020, the organic agricultural land in Europe increased by 0.60 million hectares (EU: 0.75 million hectares) or 3.7 percent (EU: 5.3 percent). In Europe, the absolute growth was lower (both in absolute and relative numbers) than in the European Union due to a major decrease of organic farmland reported from Turkey (-135'796 hectares) and the Russian Federation (-26'548 hectares).

The countries that contributed the most to the growth were France, Italy, Germany and Spain, contributing almost 700'000 additional hectares (Figure 73). The highest relative increases were in Belarus (+397.3 percent, partly due to the change of the data source), Kosovo (+54.8 percent) and Albania (+35.8 percent). As mentioned above, some countries showed a decrease in organic land, most notably Turkey (-26.2 percent).

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, Portugal and Switzerland (Table 66).

In Europe, of the 17.1 million hectares of organic agricultural land, at least 11.1 million hectares were fully converted[2] (10.2 million out of 14.9 million hectares in the European Union). At least 2.4 million hectares were under conversion (2.2 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.

By country, the largest in-conversion areas are in Western and Southern European countries, notably France (584'146 hectares), Spain (352'212 hectares), Italy (347'178 hectares) and Romania (192'926 hectares) (Table 66).

[1] No update was available for 2020; the number refers to 2019.

[2] Excluding Austria, Germany, Portugal, the Russian Federation and Switzerland

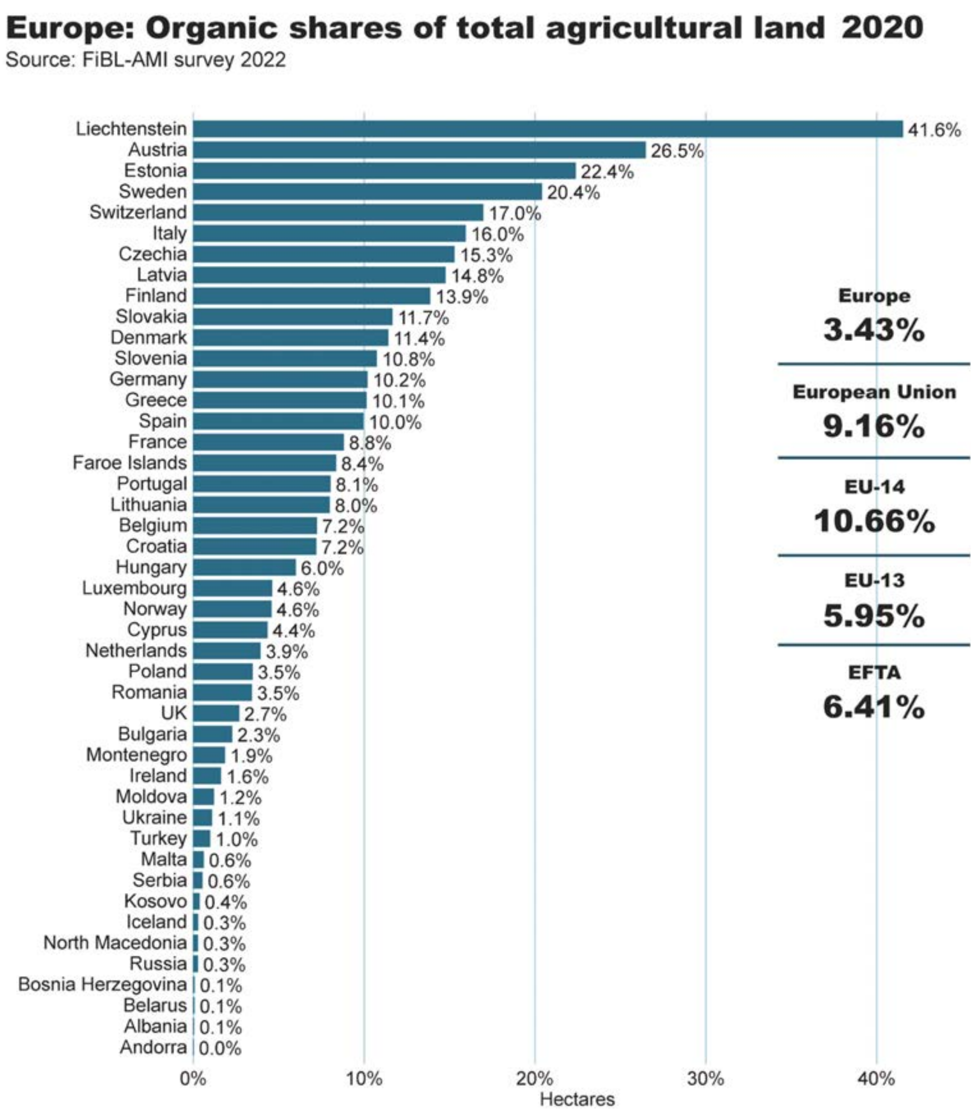


Figure 70: Europe: Organic shares of total agricultural land 2020

Source: FiBL-AMI survey 2022 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-14 = countries, which were member countries of the European Union before May 2004 (excluding the UK).

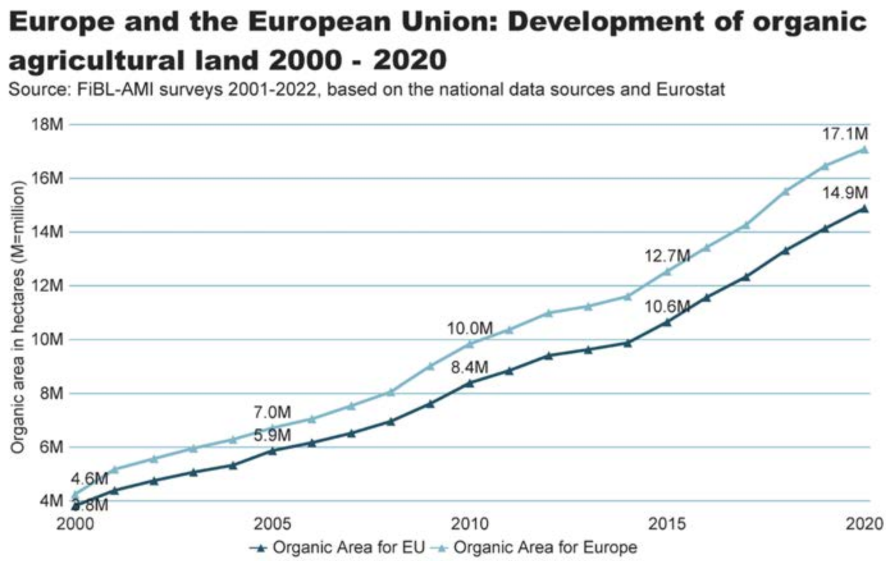


Figure 71: Europe and the European Union: Development of organic agricultural land 2000-2020

Source: FiBL-AMI Surveys 2006-2022 based on national data sources and Eurostat. The data for the European Union covers all countries that were members of the European Union in 2020.

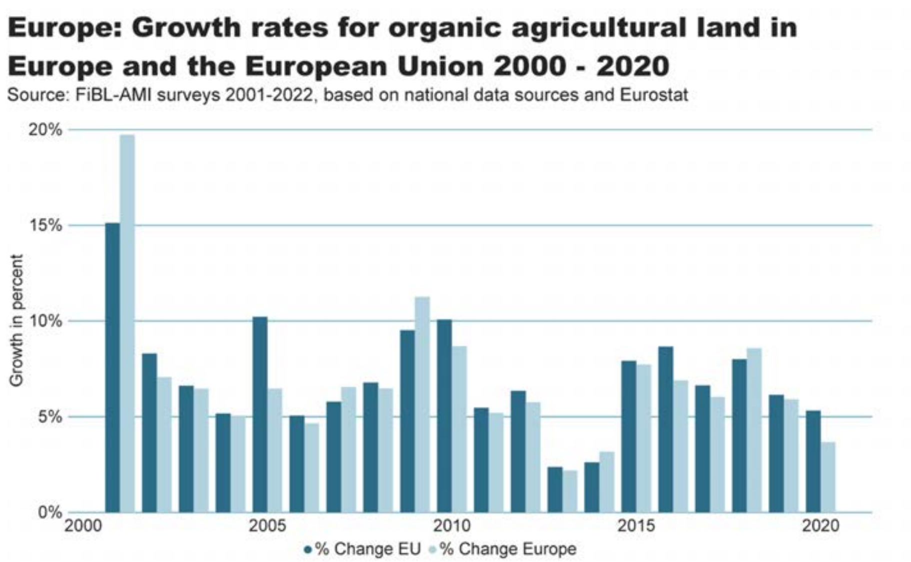
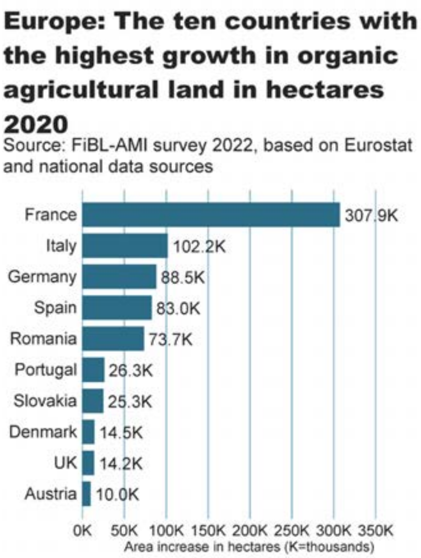


Figure 72: Europe: Growth rates for organic agricultural land in Europe and the European Union 2000-2020

Source: FiBL-AMI Surveys 2002-2022 based on national data sources and Eurostat.



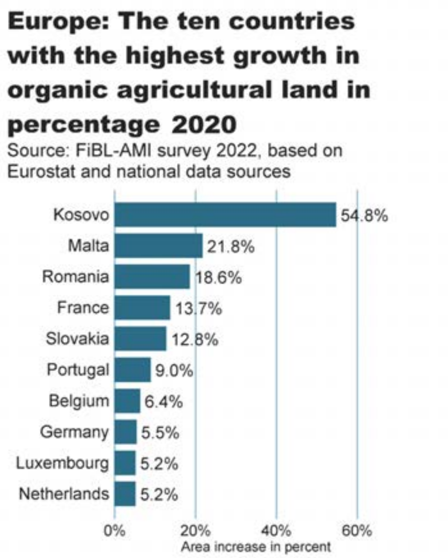


Figure 73: Europe: The ten countries with the highest growth in organic agricultural land in hectares and relative growth in 2020

Source: FiBL-AMI survey 2022 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, where often such data is not available. The area for all land use types[1] has grown steadily since 2004.[2] It should be noted, though, that for several European countries such as Belgium, Italy, Poland, Sweden, 2020 updates on land use and crops were not or only partly available. We assume that for many crops, growth rates were high than what is indicated in the tables below.

Table 60: Europe and the European Union: Land use 2020

Crop group	Europe [Million hectares] (Share of total)	European Union [Million hectares] (Share of total)	Change 2019-2020 Europe/EU [%]	Change 2011-2020 Europe/EU [%]
Arable land	8.1 (3.8%)	6.7 (6.8%)	3.2%/3.9%	76.3%/82.9%
Permanent grassland	6.7 (3.9%)	6.3 (12.4%)	3.1%/3.6%	41.4%/54.7%
Permanent crops	1.9 (10.8%)	1.7 (13.5%)	6.1%/5.7%	79.2%/74.7%
Total	**17.1 (3.4%)**	**14.9 (9.2%)**	**3.7%/5.3%**	**62.1%/68.4%**

Source: FiBL-AMI survey 2022 based on national data sources and Eurostat.
Note: Total includes other agricultural land and correction values for double-cropped areas.

Organic agricultural land by land use

– Table 60 and Figure 74 show that **arable land** constitutes a large part of the organic farmland, with almost 8.1 million hectares in Europe and 6.7 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, oilseeds and dry pulses. The largest cropland area (i.e., arable and permanent crops together) were in France (1.6 million hectares), Italy (1.4 million hectares) and Spain (1.2 million hectares) (Figure 75).
– **Permanent grassland** accounted for 6.7 million hectares in Europe and 6.3 million hectares in the European Union. By country, the largest permanent grassland/grazing area was in Spain with almost 1.3 million hectares, followed by Germany and France (Figure 75).
– **Permanent crops** constituted 10.9 percent of the total permanent cropland in Europe and 13.5 percent in the European Union, with 1.9 and 1.7 million hectares, respectively.

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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.

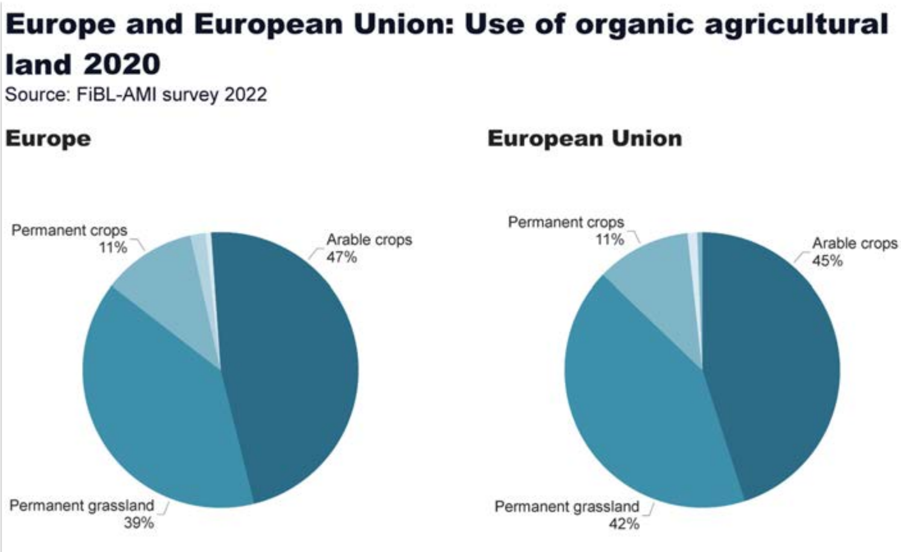

Figure 74: Europe and European Union: Distribution of land use in organic agriculture 2020

Source: FiBL-AMI survey 2022 based on Eurostat and national data sources

Share of total agricultural land:

- Compared to total agriculture (based on FAO and Eurostat land use data and not strictly comparable), organic **arable land** constituted 3.8 percent of the total arable land in Europe and 6.8 percent of that in the EU.
- Whereas the organic share of total **permanent grassland** areas was as high as 12.4 percent in the European Union, it was considerably lower in Europe as a whole (3.9 percent).
- **Permanent crops** had the highest organic area shares: 10.9 percent in Europe and 13.6 percent in the EU.

Increase by land use type

- The largest increase in 2019-2020 was in **permanent crops** (5.7 percent increase in Europe and 6.1 percent increase in the EU), mainly because additional organic permanent crop area was reported for Spain.
- **Permanent grassland** increased by 3.1 percent in Europe and 3.6 percent in the EU (Table 60, Figure 76, Figure 77.).
- The **arable farmland** grew by 3.2 percent in Europe and 3.9 percent in the EU. From 2011 to 2020, **arable land** grew in Europe by 76.3 percent and in the EU by 82.9 percent, thus showing a greater increase than the permanent crops or permanent grassland (Table 60, Figure 76, Figure 77). These numbers show the intensification of organic agriculture as the relevance of grassland is decreasing, whereas arable land is gaining in importance.

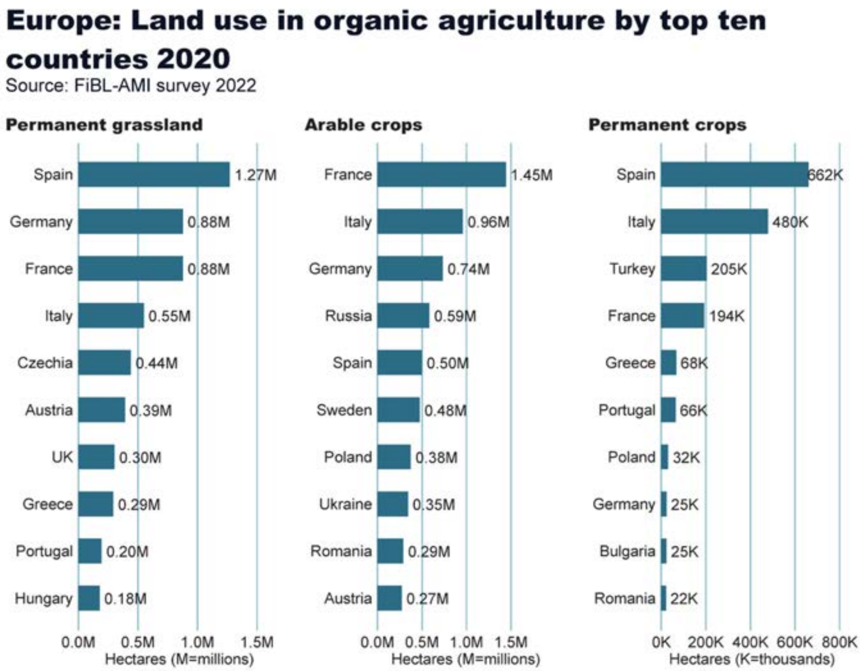

Figure 75: Europe: Land use in organic agriculture - top 10 countries 2020

Source: FiBL-AMI survey 2022 based on Eurostat and national data sources

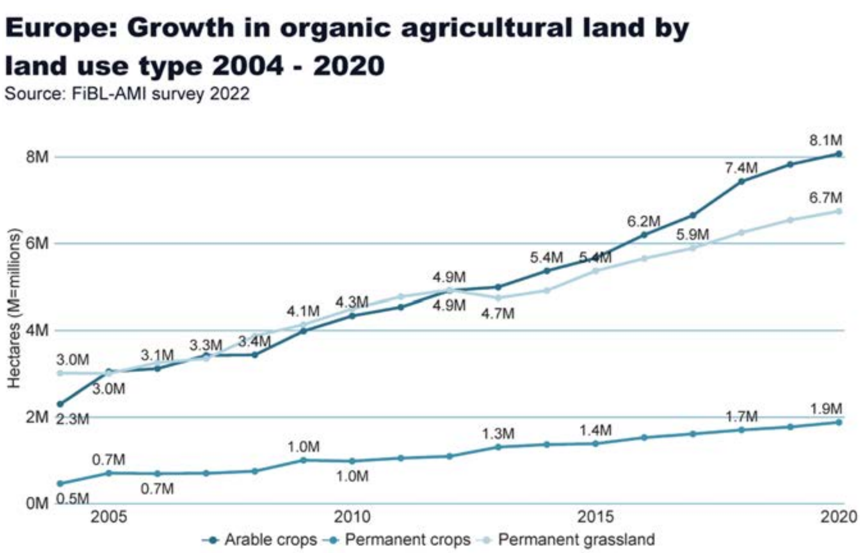

Figure 76: Europe: Growth in organic agricultural land by land use type 2004-2020

Source: FiBL-AMI Surveys 2006-2022 based on national data sources and Eurostat

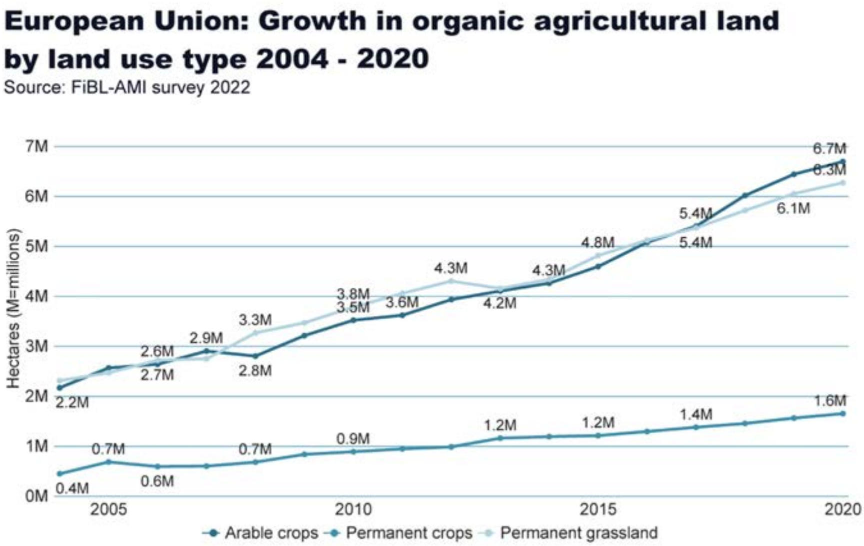

Figure 77: European Union: Growth in organic agricultural land by land use type 2004-2020

Source: FiBL-AMI Surveys 2006-2022 based on national data sources and Eurostat

3.2 Crops grown in organic agriculture

In 2020, 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 2020

	Crop group	Area (ha)		Organic share (%)		Change 2019-2020 (%)		Change 2011-2020 (%)	
		Europe	EU	Europe	EU	Europe	EU	Europe	EU
Arable crops	Cereals	3'027'517	2'440'184	2.4%	4.7%	2.6%	2.6%	63.2%	71.0%
	Dry pulses	572'233	486'964	10.0%	23.4%	4.6%	4.9%	139.6%	126.0%
	Fresh vegetables	212'563	189'721	4.7%	9.5%	5.7%	4.8%	104.1%	135.1%
	Green fodder	2'669'961	2'507'103	11.7%	12.0%	4.0%	3.8%	53.3%	68.6%
	Oilseeds	821'708	408'600	2.3%	3.7%	30.7%	18.4%	331.6%	174.1%
	Root crops	55'761	51'988	0.7%	1.7%	-4.1%	6.1%	26.9%	77.6%
Permanent crops	Berries	48'419	40'652	15.1%	27.1%	6.9%	0.0%	71.3%	56.4%
	Citrus fruit	60'864	60'021	8.7%	11.5%	5.9%	5.8%	159.9%	162.1%
	Fruit, temperate	154'046	121'889	5.7%	10.1%	4.1%	1.5%	27.7%	17.6%
	Fruit, (Sub)tropical	43'468	21'058	18.1%	12.5%	11.8%	12.0%	130.5%	179.8%
	Grapes	431'225	417'982	11.1%	13.2%	8.2%	9.6%	86.4%	92.6%
	Nuts	374'087	323'567	13.7%	23.5%	11.2%	10.9%	102.2%	96.3%
	Olives	621'470	556'629	10.3%	10.9%	-0.4%	2.7%	48.7%	44.2%

Source: FiBL-AMI survey 2022 based on national data sources and Eurostat. Totals for arable and permanent crops in other tables include further crop groups
Note: For crop details by country, please check the crop chapter in this book from page 88 and statistics.fibl.org

Arable crops

A large proportion of the organic arable land (8.1 million hectares in Europe and 6.7 million in the European Union) is used to produce cereals and green fodder, 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-quarter of the total dry pulses area. In organic farming, they are important for crop rotation and animal feeding. In contrast, they are disappearing in conventional farming, as protein crops for animal feed are imported, and synthetic fertilisers are used. Oilseeds and cereals showed by far the highest increase in land area. Both from 2019 to 2020 and the 2011-2020 period, the largest growth was noted for oilseeds, which more than trebled in Europe and almost doubled in Europe. For more information about crop groups by country, see the crop chapters in this book (page 88) and our online database at statistics.fibl.org.

– **Cereals** were the largest crop group in Europe, accounting for 3.0 million hectares or 2.4 percent of the cereal area in Europe. In the European Union, they were the second-largest group, accounting for 2.4 million hectares or 4.7 percent of the total cereal area. Wheat is the most important cereal (1.1 million hectares). The countries with the largest cereal areas were Germany, France, and Italy (including large areas of durum wheat). The highest organic shares of the total cereal area were found in Austria (17.4 percent), Estonia (14.4 percent) and Sweden (12.9 percent). Outside the European Union, the Russian Federation 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 2.5 million hectares (Europe: 2.7 million hectares). Clover, green maize, and grass on arable land were the main crop types.
– In 2020, organic **vegetables**[1] were grown on more than 210'000 hectares in Europe, and almost 190'000 hectares in the European Union, covering 4.7 percent and 9.5 percent of the vegetable area, respectively. The largest areas were in Italy (64'762 hectares), France (36'305 hectares), and Spain (22'023 hectares). High organic shares of all vegetables are found in Denmark (37.5 percent) and Luxembourg (35.5 percent).
– With more than 570'000 hectares in Europe and almost 490'000 hectares in the European Union, organic **dry pulses** accounted for a large share of all dry pulses (10.0 percent in Europe; 23.4 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, Spain and Germany. The highest

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

organic shares were found in Austria (76 percent), Denmark (53 percent) and the Netherlands (48.6 percent).

Permanent crops

A large part of the permanent cropland (1.9 million hectares in Europe and 1.7 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 almost one quarter. Both reached an organic share of more than ten percent of their respective totals. Over the 2011-2020 period, the largest growth was noted for citrus fruit and for tropical and subtropical fruit, which almost trebled in the European Union (Table 61).

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 88) and our online database at statistics.fibl.org.

- Spain, France, and Italy had an organic **grape** area of more than 100'000 hectares each. 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, 15.5 percent of the grape area was organic, in France 18.0 percent, and in Spain 14.9 percent. In the European Union, almost 10 percent of the grape area was organic.
- For **olives**, Italy and Spain had the lead (more than 200'000 hectares each). France (36.5 percent) and Italy (21.2 percent) had the highest organic shares. The largest growth occurred in Spain, where the organic olive area increased by more than 10'000 hectares.
- **Temperate fruits** were grown on more than 150'000 hectares (European Union: more than 120'000 hectares), and they covered 5.7 percent of the total temperate fruit area (10.0 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 (70'732 hectares), cherries (18'731 hectares), plums (18'002 hectares) and apricots (15'504 hectares). The largest temperate fruit producers were Turkey, Italy and France, with more than 20'000 hectares each.

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 10.0 million hectares (European Union: 6.0 million hectares). The largest wild collection area in Europe (and in the world) was in Finland with 5.5 million hectares (mainly berries). For country details on wild collection areas, see Table 68.

4 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 Table 62, a ten-year development is not shown for the number of exporters. In 2020, the increase in the number of operators was lower than in 2019.

Table 62: Europe: Organic operators by country group 2020

	Europe			European Union		
	No.	**Growth 1 year**	**Growth 10 years**	**No.**	**Growth 1 year**	**Growth 10 years**
Producers	417'977	-2.5%	44.3%	349'499	3.3%	51.1%
Processors	84'799	3.8%	105.0%	78'262	3.4%	104.0%
Importers	6'792	5.2%	116.9%	5'820	5.3%	100.1%
Exporters	4'320	22.6%	N/A%	3'589	14.7%	N/A

Source: FiBL-AMI survey 2022 based on national data sources and Eurostat. For a breakdown by country, see

Table 69. For detailed data sources, see annex.

4.1 Organic producers

In 2020, there almost 420'000 organic producers in Europe and almost 350'000 in the European Union (Table 62 and Table 69). In the European Union, the country with the largest number of producers was Italy (more than 70'000); outside the EU, it was Turkey (more than 50'500) (Figure 80). Growth in the European Union (+3.3 percent) was stronger than in Europe as a whole (-2.5 percent), where the number of farms decreased mainly due to almost 20'000 farmers less reported from Turkey. Over the decade 2011-2020, the number of producers in Europe increased by 44 percent (EU: +51 percent). Almost one-sixth of the world's organic farmers are in Europe (Figure 78).

4.2 Organic processors and importers

There were almost 85'000 organic processors in Europe (+3.8 percent compared to 2019) and more than 78'000 in the European Union (+3.4 percent). The country with the largest number of processors was Italy (22'689). Almost 6'800 importers (+5.2 percent growth) were counted in Europe and more than 5'800 in the European Union (+5.3 percent). Germany was the country with the most importers (1'916) (Table 62, Table 69, Figure 79).

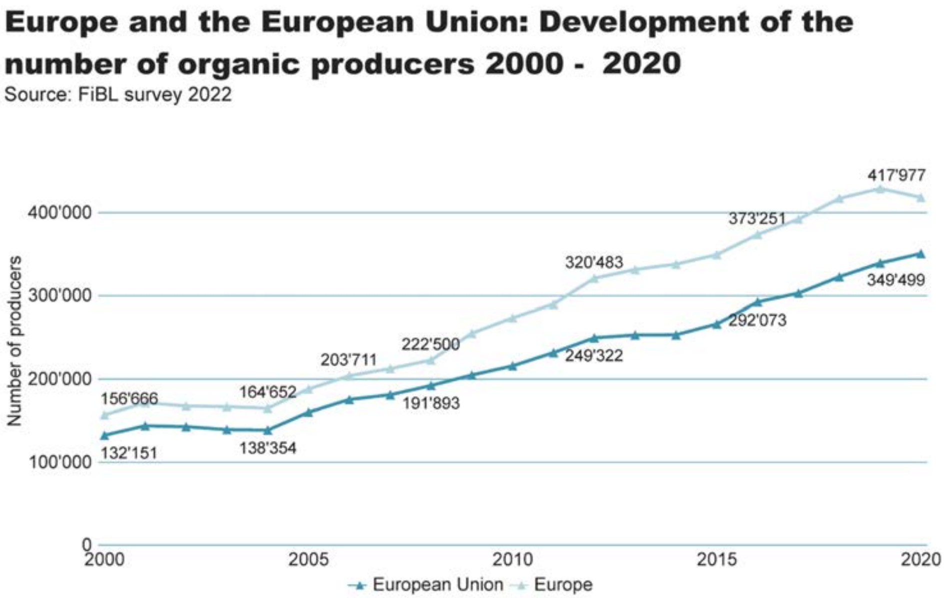

Figure 78: Europe and the European Union: Development of the number of organic producers 2000-2020

Source: FiBL-AMI surveys 2002-2022 based on national data sources and Eurostat

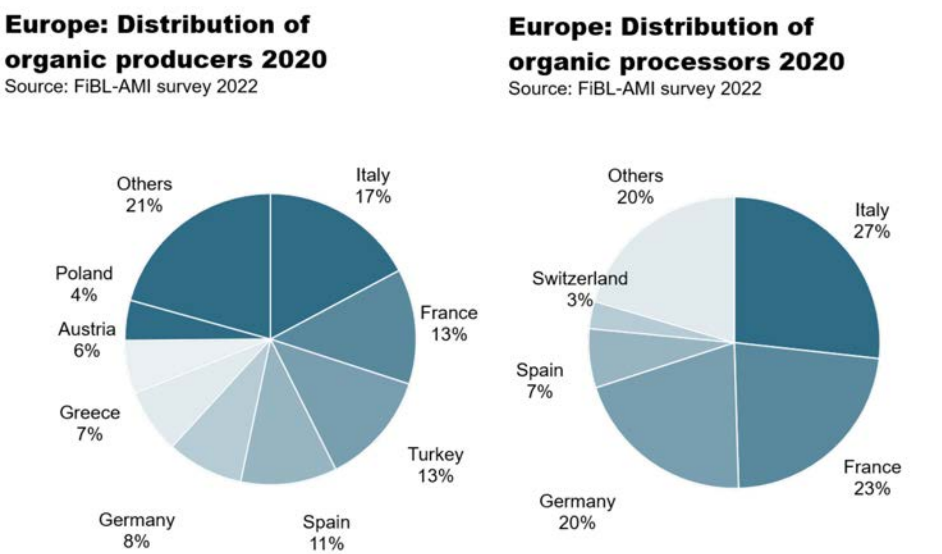

Figure 79: Europe: Distribution of organic producers and processors by country 2020

Source: FiBL-AMI survey 2022, based on national data sources and Eurostat.

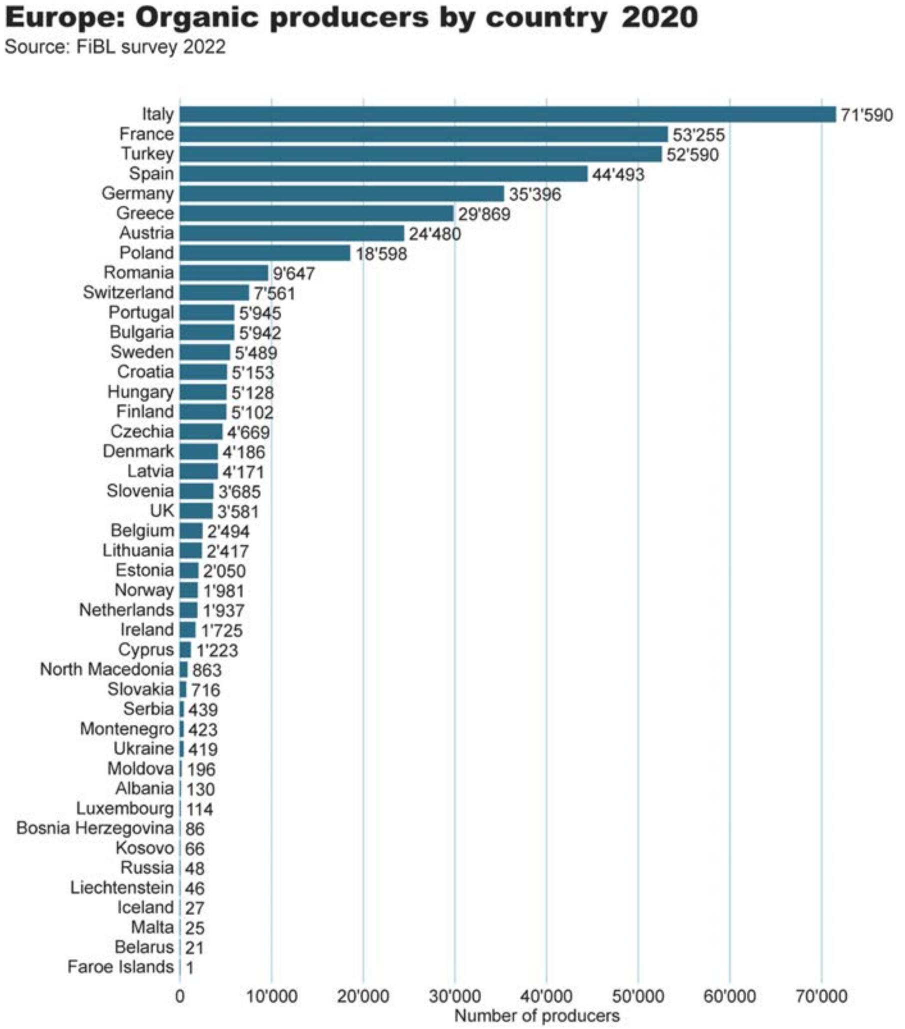

Figure 80: Europe: Number of organic producers by country 2020

Source: FiBL-AMI survey 2022 based on national data sources and Eurostat. For detailed data sources, see annex.

5 Organic retail sales

In 2020, the organic market in Europe grew to 52.0 billion euros (European Union: 44.8 billion euros) and considerably faster than in the previous year. Unfortunately, not all countries provide data on their domestic markets on a regular basis (Table 70), and it may be assumed that the market is larger than indicated by the figures in Table 63 and Table 70.

Table 63: Europe and the European Union: Organic retail sales 2020: Key data

	Retail sales [Million €]	Per capita consumption [€]	Growth 2019-2020 [%]	Growth 2011-2020 [%]
Europe	52'000.2	63.3	14.9%	144.2%
European Union	44'829.8	101.8	15.1%	152.1%

Source: FiBL-AMI survey 2022 based on national data sources. For country details, see annex.
Please note that the EU number is not comparably to what was communicated in previous years as only the countries that were a member of the EU in 2020 were included.

5.1 Size of the organic market

Germany continued to be the largest market in Europe (15 billion euros) (Figure 82), and, after the United States, it is the second biggest organic market in the world. France holds second place in Europe with 12.7 billion euros Figure 82).

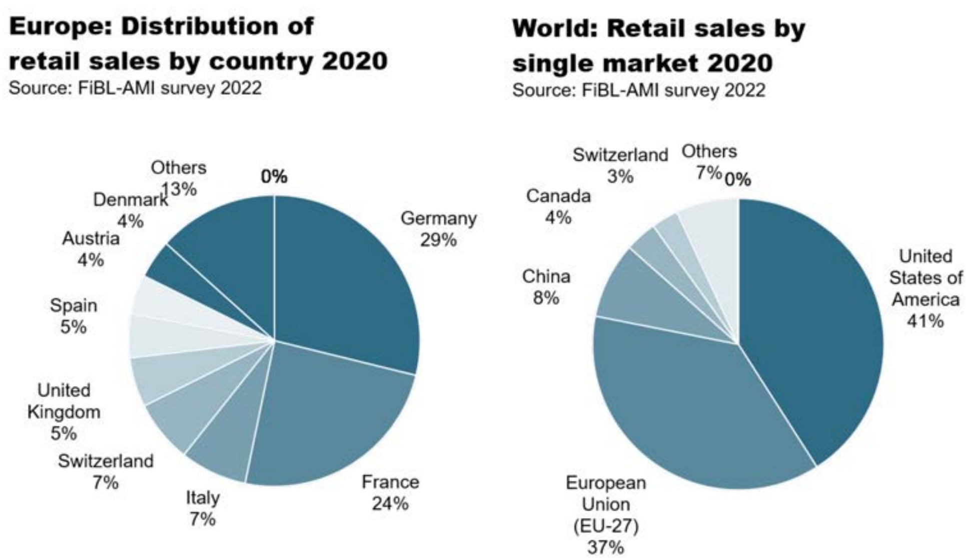

Figure 81: Europe: Distribution of retail sales by country and by single market worldwide 2020

Source: FiBL-AMI survey 2022 based on national data sources

Comparing organic markets by single markets, the United States had the lead. 40.9 percent of global retail sales of organic products are in the United States (49.5 billion euros), followed by the European Union (44.8 billion euros; 37.1 percent of organic global retail sales, Figure 81). Comparing retail sales by continent, North America, with 44.5 percent of the world's organic retail sales, was the largest market (53.7 billion euros).

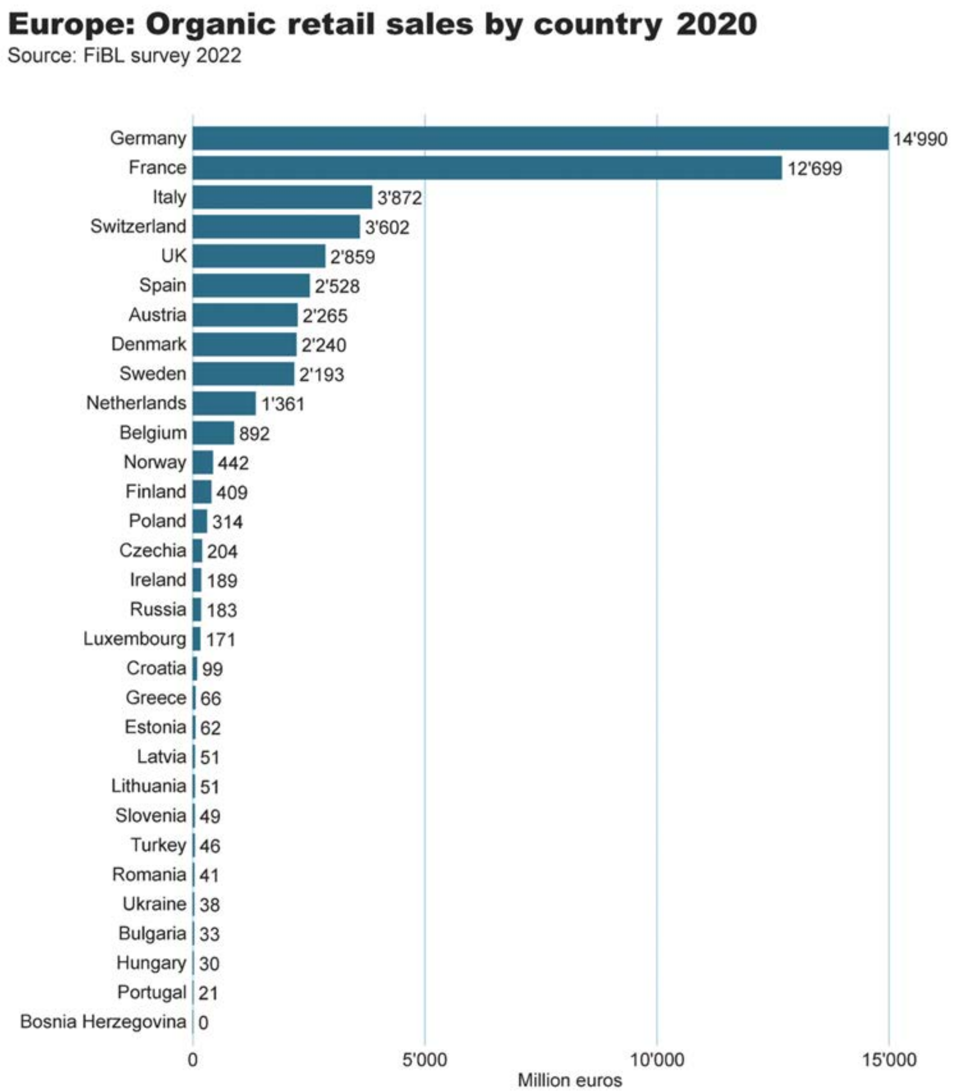

Figure 82: Europe: Retail sales by country 2020

Source: FiBL-AMI survey 2022 based on national data sources. Please note that 2020 data were not available for all countries. For detailed data sources, see annex.

5.2 Growth of the organic market

The organic market grew in Europe and the EU by approximately 15 percent, the highest growth rate achieved in the current decade. From 2011 to 2020, the organic market more than doubled in size (Figure 83).

All countries for which new data were available showed growth, many in the double-digits (Figure 84). With 22.3 percent, Germany showed the highest increase, followed by Switzerland and Austria (Figure 84, Table 70).

The United Kingdom, which left the European Union in January 2020, also showed double-digit growth (12.6 percent increase in 2020).

Figure 83: Growth of organic retail sales in Europe and the European Union, 2000-2020

Source: FiBL-AMI surveys 2004-2022, and OrganicDataNetwork Surveys 2013-2015

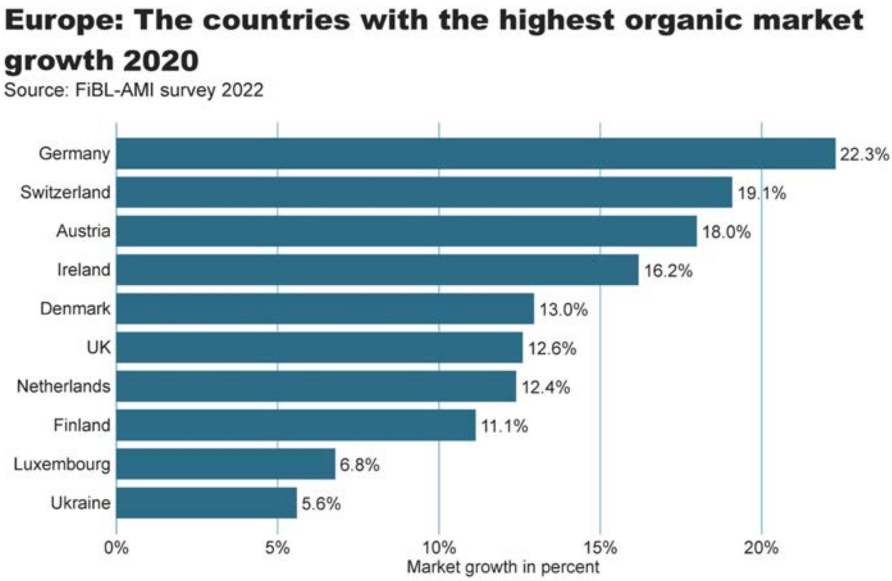

Figure 84: Europe: The countries with the highest organic market growth 2020

Source: FiBL-AMI surveys 2022. For detailed data sources, see annex.

5.3 Per capita consumption of organic food

Like in the previous years, the highest per capita consumption of organic food was in Switzerland (418 euros) and Denmark (384 euros). Switzerland is now the number one in the world in terms of per capita consumption, partly due to the fact that the Swiss Franc increased in value. Seven countries had a per capita consumption of more than 100 euros in 2020 (Figure 85, Table 70).

The continual growth in consumer interest is well documented by the development of per capita consumption, with a specific notable increase in 2020 (Figure 86). The per capita consumption in Europe rose to 63.3 euros and to 101.8 euros in the European Union.

In Central Eastern European countries, consumer spending is still low (Table 70). 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 the area and operator data is good, the Czech Republic and Estonia are the only countries with a permanent collection system for retail sales data.

[1] Estonia, Latvia and Lithuania.

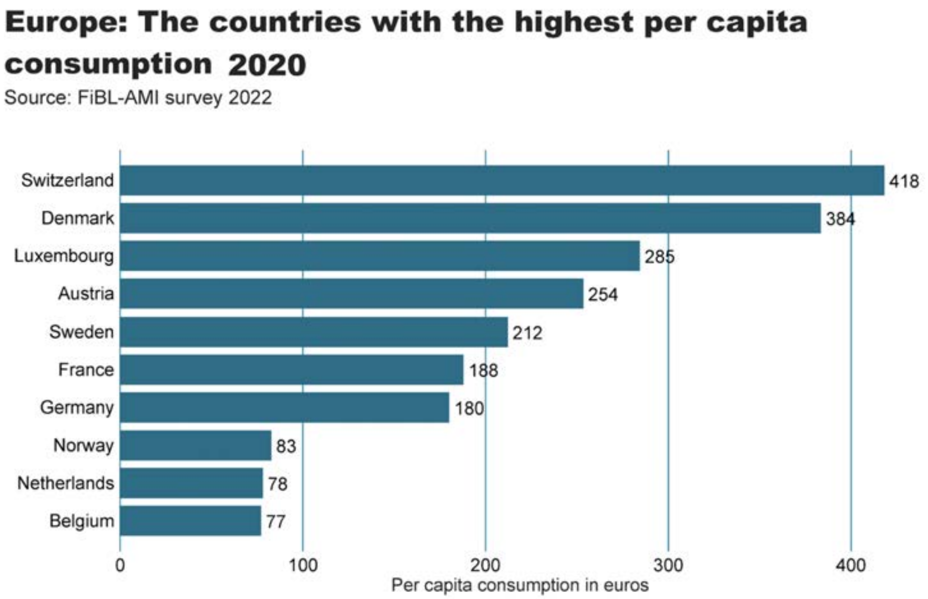

Figure 85: Europe: The countries with the highest per capita consumption 2020

Source: FiBL-AMI survey 2022 based on national data sources. For detailed data sources, see annex.

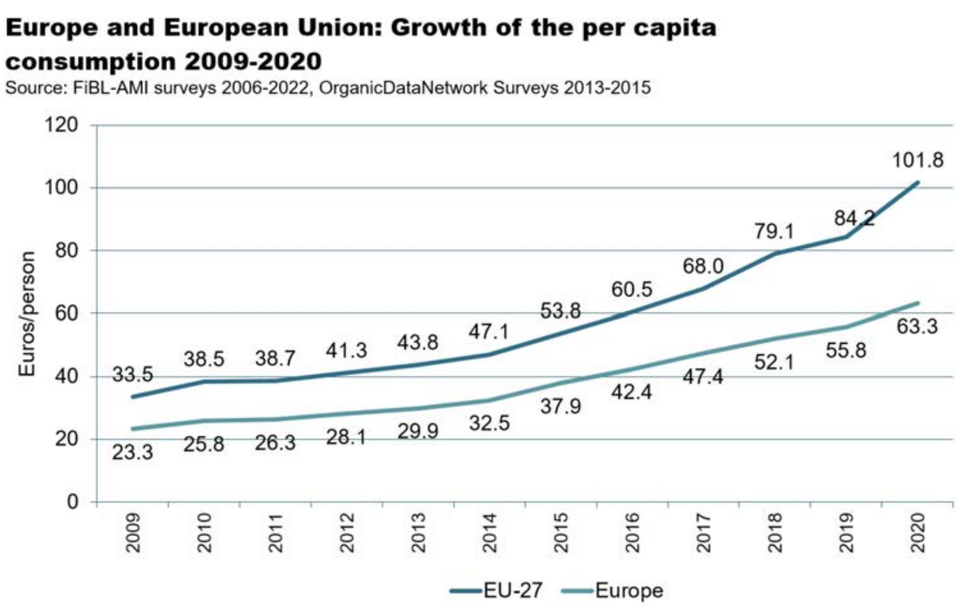

Figure 86: Europe: Growth of the per capita consumption 2010-2020

Source: FiBL-AMI survey 2022 based on national data sources. Calculation based on Eurostat population data. For detailed data sources, see annex.

5.4 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 (13 percent, highest organic market share in the world), Austria (11.3 percent) and Switzerland (10.8 percent) (Figure 87, Table 70).

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. The pandemic interrupted that development and made general food markets grow rapidly as long as out of home consumption was locked down. Market shares of individual products and product groups can be far higher; these data are provided in Table 64.

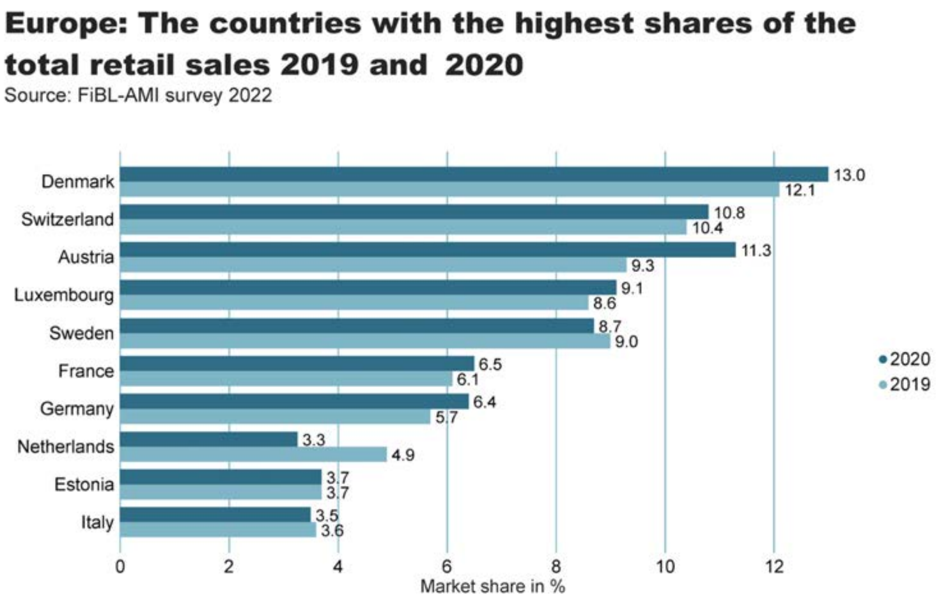

Figure 87: Europe: The countries with the highest shares of the total retail sales 2019 and 2020

Source: FiBL-AMI survey 2022 based on national data sources. For detailed data sources, see annex.

5.5 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 64 shows that, in Denmark and France, eggs reach organic market shares of more than 30 percent (in value).

Table 64: Organic shares for retail sales values (euros) for selected products 2020

	Austria	Belgium	Czech Republic (2019)	Denmark	Finland	France (2019)	Germany	Italy (2019)	Netherlands	Norway (2018)	Spain (2017)	Sweden (2017)	Switzerland	UK
Baby food					22.0	26.9		4.8		33.1				59.6
Beverages			0.4	14.8 (juice)		5.5		3.0		0.5		5.6	4.3	
Bread & bakery products		3.9 (bread)	0.9			5.3	8.5 (bread)	4.0	0.9	2.1		3.5	26.2 (bread only)	0.3
Eggs	22.8	17.5		31.2	21.0	37.2	25.4	19.8	17.0	9.5	2.9		28.9	8.8
Fish and fish products						3.1			1.4	1.5	0.6	12.9		1.1
Fresh vegetables	17.6	8.4				7.6	13.8	4.7		4.2	3.3	12.2	26.9	4.8
Fruit	11.7	6.3				8.8	9.9	6.6		2.2	1.7	18.4	18.4	3.0
Vegetables and fruit			1.7		7.0	8.2		7.7	4..5				21.2	0.5
Meat and meat products	4.2 (meat)		0.4	9.4 (beef)		3.2	5.8 (meat)	2.9	3.3	0.5	1.2	2.9	6.2 (including fish)	1.6
Milk and dairy products	13.1	4.2	1.7			5.8	12.3	3.6	4.0	2.1	1.1	10.4	11.3	3.5
- Butter	11.8			17.8		7.4	6.9	2.8		3.1				
- Cheese	11.0			8.5	2.0	2.6	6.0	1.0		0.7			7.9	1.1
- Milk	21.9	4.8		34.3	4.5	15.7	16.4	8.1		4.4			26.0	5.1
- Yoghurt	25.3					9.1	10.7	6.1		0.7				8.2

Sources: FiBL-AMI survey 2022, based on data from Austria: RollAMA based on GfK, Belgium: Biowallonie; 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 Marche 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, Sweden, and Germany. 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 more than 30 percent. Individual products can reach even higher market shares. Organic bananas (66 percent in Denmark) or organic milk substitutes (62 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.

5.6 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 70).

Figure 88 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 89.

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 24.6 percent in 2020. Supermarket chains have founded partnerships with organic associations and sell products with their brands.

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.

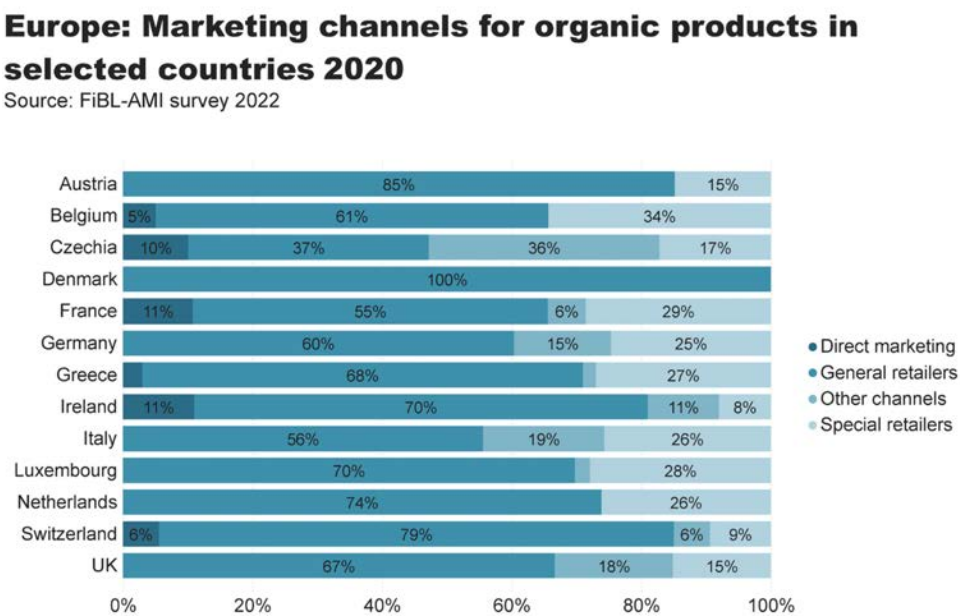

Figure 88: Europe: Marketing channels for organic products in selected countries 2020

Source: FiBL-AMI survey 2022 based on national data sources.
For detailed data sources, see annex.

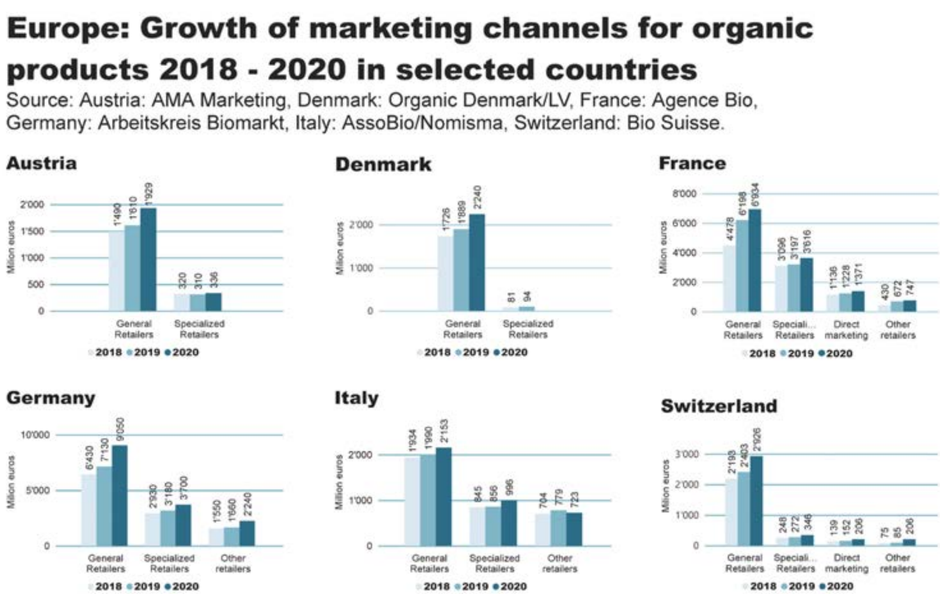

Figure 89: Europe: Growth of marketing channels for organic products 2018-2020 in selected countries

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

5.7 Organic imports

The European Union, which is the second-biggest organic market, provided data on its organic imports, showing, for the third time, the key import products and key importing countries (based on volume in metric tons MT).

- In 2020, the EU imported a total of 2.8 million MT of organic agri-food products.
- The biggest importers (based on import volume in metric tons) were the Netherlands, followed by Germany and Belgium. For the Dutch import should be noted that a large part of the goods is resold to other EU countries. For a full list, see Table 71.
- Compared to 2019, organic imports declined by 1.9 percent (Figure 90).
- 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 was the biggest supplier of organic agri-food products to the EU, with 433'705 tonnes; this corresponds to 13.4 percent of the total organic import volume.

For more information, see the contribution about EU organic imports on page 146.

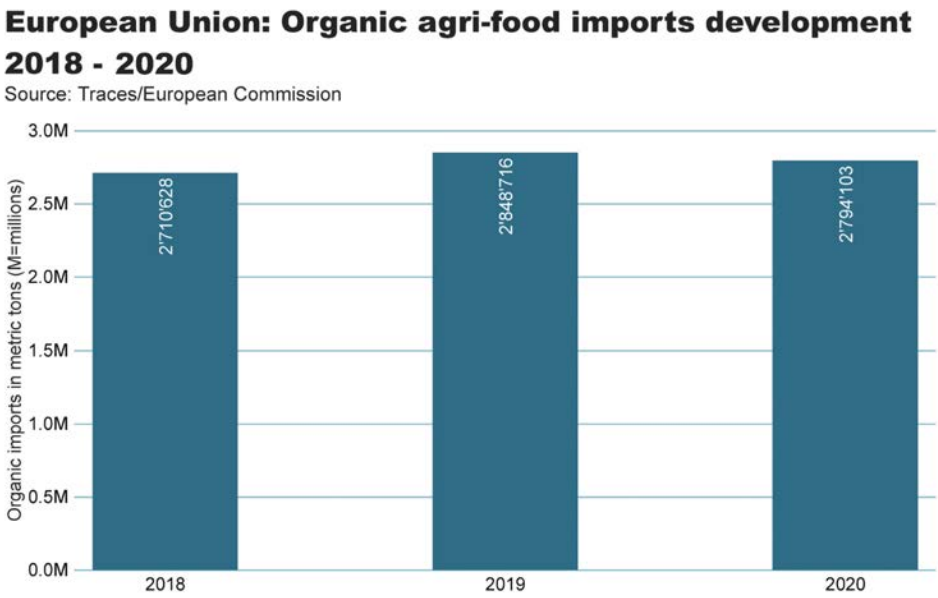

Figure 90: EU organic imports: Growth 2018 to 2020 (EU27)

Source Traces

5.8 Impact of COVID-19 on the organic market

The COVID-19 pandemic has tremendously impacted most people’s purchasing behaviour and has given the organic market an unprecedented upturn in many countries. People have been staying at home to eat, and out-of-home meals have been reduced to a minimum. On the other hand, in general, food sales in supermarkets have increased rapidly. Organic food sales have accelerated even faster. When consumers have the choice, which they don't have in canteens and restaurants, they more often buy organic products; for example, in 2020, the growth of the organic market in Germany was twice as strong as the general food market. Health, environment and climate change have become big issues among the population – even more so in the pandemic. Consuming organic food allows people to afford something good when travelling, going out to restaurants and theatre visits are not possible and supermarkets, natural food stores and direct marketers fulfil consumers' desire for healthier, more regional and organic products.

Many shops have become innovative in selling food, adapting to consumer preferences for not leaving home or going too far for shopping. Online sale options, like subscription boxes for organic food, have grown tremendously along with 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 but slower growth rates. People's awareness of organic, environmental and health issues will remain. Decreasing incomes and increasing prices for many other consumer goods like energy in some population groups may reduce organic retail sales.

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

Conclusion

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

In past years, the organic market in many countries was growing faster than production; driven by the pandemic, it has grown faster than before. As shown by the import statistics, domestic supply, including products that can be grown in Europe, still cannot meet demand. However, organic farmland growth did not keep pace. Therefore, many organic organisations or market actors are calling for more farmers to convert to organic. More processing, storing and distribution facilities are also 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 comes 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 third time (European Commission 2021). 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.

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.

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.

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 27 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-14 countries, who were member countries of the European Union before the accession of ten candidate countries on May 1, 2004. The United Kingdom, which left the European Union in 2020, is not included in the 2020 European Union level 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, Ukraine and the United Kingdom.

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

Organic Agriculture in Europe: Tables

Table 65: Europe: Organic agricultural land by country 2020

Country	Organic agr. land [ha]	Organic share [%]	Change 2019-2020 [%]	Change 2011-2020 [%]	Change 2019-2020 [ha]
Albania	887	0.1%	35.8%	97.9%	234
Andorra	2	0.0%	0.0%	-50.0%	0
Austria	679'872	26.5%	1.5%	20.9%	9'951
Belarus	6'838	0.1%	397.3%		5'463
Belgium	99'075	7.2%	6.4%	79.1%	5'956
Bosnia & Herzegovina	1'692	0.1%	0.0%	393.5%	0
Bulgaria	116'253	2.3%	-1.3%	364.6%	-1'526
Channel Islands	180	2.0%	0.0%	-28.0%	0
Croatia	108'610	7.2%	0.4%	239.0%	483
Cyprus	5'918	4.4%	-5.2%	65.5%	-322
Czech Republic	539'532	15.3%	-0.3%	17.2%	-1'454
Denmark	299'998	11.4%	5.1%	85.0%	14'472
Estonia	220'796	22.4%	0.0%	65.0%	59
Faroe Islands	251	8.4%	0.0%	-0.8%	0
Finland	315'112	13.9%	2.8%	67.4%	8'628
France	2'548'677	8.8%	13.7%	161.4%	307'880
Germany	1'702'240	10.2%	5.5%	67.6%	88'455
Greece	534'629	10.1%	1.1%	150.7%	5'877
Greenland		0.0%	N/A	N/A	0
Hungary	301'430	6.0%	-0.6%	142.3%	-1'760
Iceland	4'709	0.3%	-18.0%	-42.9%	-1'031
Ireland	73'952	1.6%	0.0%	36.6%	0
Italy	2'095'380	16.0%	5.1%	91.0%	102'155
Kosovo	1'604	0.4%	54.8%	14350.5%	568
Latvia	291'150	14.8%	0.5%	58.2%	1'354
Liechtenstein	1'490	41.6%	1.4%	36.1%	20
Lithuania	235'471	8.0%	-2.7%	54.6%	-6'647
Luxembourg	6'118	4.6%	5.2%	64.5%	304
Malta	67	0.6%	21.8%	193.6%	12
Moldova	27'624	1.2%	3.5%	25.0%	921
Montenegro	4'823	1.9%	1.5%	57.2%	71
Netherlands	71'607	3.9%	5.2%	51.7%	3'539
North Macedonia	3'727	0.3%	0.4%	-85.9%	16
Norway	45'312	4.6%	0.0%	-18.4%	0
Poland	507'637	3.5%	0.0%	-16.7%	0
Portugal	319'540	8.1%	9.0%	59.6%	26'327
Romania	468'887	3.5%	18.6%	103.9%	73'659
Russia	615'188	0.3%	-4.1%	385.0%	-26'548
Serbia	19'317	0.6%	-9.2%	209.7%	-1'949
Slovakia	222'896	11.7%	12.8%	33.7%	25'331
Slovenia	52'078	10.8%	4.9%	62.0%	2'440
Spain	2'437'891	10.0%	3.5%	50.3%	82'975
Sweden	613'964	20.4%	0.0%	27.9%	0
Switzerland	177'347	17.0%	2.7%	52.6%	4'633
Turkey	382'639	1.0%	-26.2%	-13.5%	-135'796
Ukraine	462'225	1.1%	-1.2%	71.0%	-5'755
United Kingdom	473'500	2.7%	3.1%	-25.8%	14'225
Total Europe	**17'098'134**	**3.4%**	**3.7%**	**62.1%**	**603'222**
Total EU	**14'868'780**	**9.2%**	**5.3%**	**68.3%**	**748'149**

Source*: FiBL-AMI survey 2022 based on Eurostat and national data sources. For data sources, see annex.*

Table 66: Europe: Conversion status of organic agricultural land 2020

County	Organic area [ha]	Area fully converted [ha]	Area under conversion [ha]
Albania	887	767	121
Andorra	2	2	
Austria	679'872		
Belarus	6'838	967	5'871
Belgium	99'075	78'323	14'796
Bosnia and Herzegovina	1'692	1'279	413
Bulgaria	116'252	96'481	19'779
Channel Islands	180	180	
Croatia	108'610	79'186	29'429
Cyprus	5'918	5'290	627
Czech Republic	539'532	501'892	37'640
Denmark	299'998	243'674	56'328
Estonia	220'796	201'557	19'236
Faroe Islands	251	251	
Finland	315'112	282'781	32'331
France	2'548'677	1'964'726	584'146
Germany	1'702'240		
Greece	534'629	451'079	83'554
Hungary	301'430	193'217	108'216
Iceland	4'709	4'150	559
Ireland	73'952	66'913	6'796
Portugal	319'540	269'369	50'188
Romania	468'887	275'966	192'926
Russian Federation	615'187		
Serbia	19'317	9'614	9'699
Slovakia	222'896	181'740	41'153
Slovenia	52'078	45'788	6'292
Spain	2'437'891	2'085'711	352'212
Sweden	613'964	555'788	58'176
Switzerland	177'347		
Turkey	382'639	267'823	114'847
Ukraine	462'225	410'583	51'642
United Kingdom	473'500	442'600	30'300
Total Europe	**17'098'134**	**11'484'443**	**2'432'533**
Total European Union	**14'868'780**	**10'275'625**	**2'205'101**

Source*: FiBL-AMI survey 2022 based on Eurostat and national data sources. For data sources, see annex.*

Table 67: Europe: Land use in organic agriculture by country 2020

Country	Arable land [ha]	Permanent crops [ha]	Permanent grassland [ha]	Total [ha]
Albania	759	128		887
Andorra		2		2
Austria	274'761	12'298	392'734	679'872
Belarus	1'298	66		6'838
Belgium	31'789	1'418	58'123	99'075
Bosnia and Herzegovina	1'532	159		1'692
Bulgaria	61'249	24'849	30'154	116'252
Channel Islands				180
Croatia	50'203	16'077	42'332	108'610
Cyprus	2'916	2'816	186	5'918
Czech Republic	91'436	5'696	442'399	539'532
Denmark	248'473	3'576	47'949	299'998
Estonia	124'378	2'522	93'896	220'796
Faroe Islands	1		250	251
Finland	266'668	625		315'112
France	1'445'221	193'731	879'244	2'548'677
Germany	735'727	25'132	880'000	1'702'240
Greece	172'441	68'176	294'012	534'629
Hungary	105'562	14'907	180'961	301'430
Iceland	543	1	2'356	4'709
Ireland	4'319	64	69'323	73'952
Italy	961'692	480'459	551'074	2'095'380
Kosovo	1'593	11		1'604
Latvia	155'204	3'311	132'635	291'150
Liechtenstein	228	7	1'144	1'490
Lithuania	142'344	4'753	82'143	235'463
Luxembourg	2'858	130	3'130	6'118
Malta	41	26		67
Moldova	23'223	4'305		27'624
Montenegro	307	564	3'952	4'823
Netherlands	29'165	901	41'541	71'607
North Macedonia	2'955	772		3'727
Norway	36'504	335	8'473	45'312
Poland	375'740	31'924	99'973	507'637
Portugal	57'381	65'657	196'502	319'540
Romania	291'628	22'221	155'038	468'887
Russian Federation	585'268		2'489	615'187
Serbia	10'200	5'600	3'517	19'317
Slovakia	75'589	2'095	145'209	222'896
Slovenia	6'893	3'280	41'903	52'078
Spain	502'074	662'425	1'273'392	2'437'891
Sweden	476'981	610	136'372	613'964
Switzerland	42'951	3'107	128'550	177'347
Turkey	165'058	205'036	12'545	382'639
Ukraine	345'375	3'855	1'375	462'225
United Kingdom	159'000	2'000	304'500	473'500
Total Europe	**17'098'134**	**1'875'629**	**6'739'377**	**17'098'125**
Total European Union	**14'868'780**	**1'649'681**	**6'270'225**	**14'868'771**

Source: FiBL-AMI survey 2022 based on Eurostat and national data sources. For data sources, see annex. The total includes other agricultural areas for which no land use details were available.

Table 68: Europe: Organic agricultural land and wild collection areas by country 2020

Country	Agricultural land [ha]	Wild collection [ha]	Total [ha]
Albania	887	722'984	723'871
Andorra	2		2
Austria	679'872		679'872
Belarus	6'838		6'838
Belgium	99'075		99'075
Bosnia and Herzegovina	1'692	11'579	13'271
Bulgaria	116'252		116'252
Channel Islands	180		180
Croatia	108'610		108'610
Cyprus	5'918		5'918
Czech Republic	539'532		539'532
Denmark	299'998		299'998
Estonia	220'796	447'271	668'067
Faroe Islands	251	0	251
Finland	315'112	5'513'475	5'828'587
France	2'548'677		2'548'677
Germany	1'702'240		1'702'240
Greece	534'629		534'629
Greenland			
Hungary	301'430		301'430
Iceland	4'709	216'727	221'437
Ireland	73'952		73'952
Isle of Man			
Italy	2'095'380		2'095'380
Kosovo	1'604	1'596'843	1'598'447
Latvia	291'150		291'150
Liechtenstein	1'490		1'490
Lithuania	235'463		235'463
Luxembourg	6'118		6'118
Malta	67		67
Moldova	27'624	1'729	29'352
Montenegro	4'823		4'823
Netherlands	71'607		71'607
North Macedonia	3'727	556'600	560'327
Norway	45'312		45'312
Poland	507'637		507'637
Portugal	319'540		319'540
Romania	468'887		468'887
Russian Federation	615'187	221'039	836'226
Serbia	19'317		19'317
Slovakia	222'896		222'896
Slovenia	52'078		52'078
Spain	2'437'891		2'437'891
Sweden	613'964		613'964
Switzerland	177'347		177'347
Turkey	382'639	33'283	415'922
Ukraine	462'225	591'389	1'053'614
United Kingdom	473'500		473'500
Total Europe	**17'098'134**	**9'912'919**	**27'011'044**
Total European Union	14'868'780	**5'960'746**	**20'829'517**

Source: FiBL-AMI survey 2022 based on Eurostat and national data sources. For data sources, see annex.

Table 69: Europe: Organic producers, processors, and importers by country 2020

For data year, see Table 11: World: Organic producers and other operator types by country 2020, page 59.

Country	Producers	Processors	Importers	Exporters
Albania	130	46		25
Andorra		3		
Austria	24'480	1'691	58	4
Belarus	21	17	1	15
Belgium	2'494	1'585	304	153
Bosnia and Herzegovina	86	51		20
Bulgaria	5'942	249	22	2
Croatia	5'153	395	22	3
Cyprus	1'223	70	16	0
Czech Republic	4'669	852	324	154
Denmark	4'186	1'162	101	104
Estonia	2'050	176	38	18
Faroe Islands	1	1		
Finland	5'102	466	56	33
France	53'255	19'311	662	
Germany	35'396	17'350	1'916	1'349
Greece	29'869	1'653	45	40
Hungary	5'128	521	48	0
Iceland	27	20	2	
Ireland	1'725	26	24	2
Italy	71'590	22'689	544	885
Kosovo	66	21		
Latvia	4'171	65	5	0
Liechtenstein	46			
Lithuania	2'417	124	3	170
Luxembourg	114	104	7	0
Malta	25	8	17	0
Moldova	196	18	5	31
Monaco		2		
Montenegro	423	19		
Netherlands	1'937	993	479	132
North Macedonia	863	24	7	9
Norway	1'981	471	103	0
Poland	18'598	668	267	319
Portugal	5'945	1'036	47	36
Romania	9'647	201	30	27
Russian Federation	48	16		
San Marino		2		
Serbia	439	101	56	100
Slovakia	716	119	43	5
Slovenia	3'685	139	28	0
Spain	44'493	5'561	416	138
Sweden	5'489	1'048	298	15
Switzerland	7'561	1'245	498	32
Turkey	52'590	1'844	84	499
Ukraine	419	70		
United Kingdom	3'581	2'566	216	
Total Europe	**417'977**	**84'799**	**6'792**	**4'320**
Total European Union	**349'499**	**78'262**	**5'820**	**3'589**

Source: FiBL-AMI survey 2022 based on Eurostat and national data sources. For data sources, see annex.
**Total number includes data for countries with less than three operators.*

Table 70: Europe and European Union: Organic trade 2020*

Country	Data year **	Retail sales [Million €]	€/person [€]	Organic share [%]	1 year growth [%]	Food-service [Million €]	Exports [Million €]	Imports [Million €]
Austria	2020	2'265.0	253.6	11.3	18.0	109.0		
Belgium	2020	892.0	77.2	3.2	13.0			
Bosnia & Herzegovina	2017	0.4	0.1					
	2018						6.3	
Bulgaria	2019			0.4				
	2020	33.3	5.0					
Croatia	2011						2.9	34.8
	2018	99.3	24.2	2.2				
Czech Republic	2019	204.4	19.1	1.5		11.7	116.6	115.7
Denmark	2019						406.1	646.8
	2020	2'240.0	383.6	13.0	13.0	271.0		
Estonia	2017					9.9		
	2019	61.8	46.8	3.7			27.0	
Finland	2019						27.5	
	2020	409.0	73.9	2.6	11.1			
France	2020	12'699.0	188.0	6.5	12.2	505.0	887.0	2'830.0
Germany	2020	14'990.0	180.3	6.4	22.3	500.0		
Greece	2017	66.0	5.6	0.3				
Hungary	2009						20.0	18.0
	2015	30.0	3.0	0.3				
Ireland	2020	189.3	39.2	2.2	16.2			
Italy	2020	3'872.0	64.1	3.5	4.0	701.0	2'619.0	
Kosovo	2015						6.0	
Latvia	2017	51.0	6.3	1.5			51.0	
Lithuania	2017	50.5	17.8	1.0		5.0	45.0	
Luxembourg	2018					6.0		
	2020	170.9	284.6	9.1	6.8			
Netherlands	2016						1'200.0	
	2019					330.3		
	2020	1'361.1	78.2	3.3	12.4			
Norway	2016			1.7				
	2019	441.8	82.9			29.9		
Poland	2019	314.1	8.3	0.6				
Portugal	2011	21.0	2.0	0.2				
Romania	2011						200.0	35.0
	2016	40.7	2.1	0.2				
Russian Federation	2009						4.0	
	2018	183.0						
Serbia	2012							3.7
	2016						18.9	
Slovenia	2009					0.1	0.1	23.0
	2013	48.6	26.6	1.8				
Spain	2019					54.4		
	2020	2'528.0	53.4	2.5	7.0		1'165.0	1'014.0
Sweden	2018						117.0	
	2020	2'192.8	212.3	8.7	0.7	449.1		
Switzerland	2020	3'602.1	418.4	10.8	19.1			
Turkey	2014	46.2	0.6					
	2017						182.0	540.0
Ukraine	2015							4.0
	2020	38.0	0.9		5.6		178.6	
United Kingdom	2016						193.9	
	2019			1.8				
	2020	2'982.4	44.8		12.6	75.7		
Total Europe* **		**52'000.2**	**63.3**		**14.9%**			
Total EU * **		**44'829.8**	**101.8**		**15.1%**			

Source: FiBL-AMI survey 2022 based on national data sources. For details on data sources, see annex.

*Note on the table:
- Where no published data exists, best estimates from experts were used.
- 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 2020 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.

** «Data year» refers to the year from which the data are. As stated above, not all countries provided up-to-date data.

*** Please note that in particular, for export and import values, the data are not complete.

Table 71: European Union: EU organic imports by member state 2020 (EU 27)

Country	2018 [MT]	2019 [MT]	2020 [MT]
Austria	35'920.9	28'379.1	30'766.2
Belgium	177'959.5	371'911.6	303'002.3
Bulgaria	12'280.6	14'847.1	15'330.7
Croatia	3'559.3	1'059.0	540.4
Cyprus	211.2	251.6	139.9
Czech Republic	29'492.6	19'956.0	25'020.6
Denmark	127'413.1	120'704.8	82'116.4
Estonia	474.8	326.1	313.0
Finland	14'987.7	18'921.3	18'421.1
France	213'625.3	240'582.4	274'620.0
Germany	427'615.9	432'897.1	491'718.5
Greece	6'368.0	8'269.8	10'180.1
Hungary	2'061.7	991.8	991.5
Ireland	19'476.4	4'099.4	61'778.5
Italy	185'803.0	180'388.1	236'106.3
Latvia	52.4	3'359.4	520.0
Lithuania	2'797.5	8'346.2	33'144.3
Luxembourg	487.8	47.2	65.1
Malta	1.0	8.8	60.0
Netherlands	953'037.8	1'037'553.5	857'360.6
Poland	19'330.4	29'285.3	36'077.2
Portugal	7'238.9	4'305.1	7'070.4
Romania	8'816.7	9'025.7	10'888.7
Slovakia	455.0	617.0	251.6
Slovenia	17'460.9	22'418.9	6'458.3
Spain	78'818.2	100'140.1	112'183.6
Sweden	167'269.1	190'023.2	178'977.7
European Union Undefined	197'612.1		
Total	**2'710'628.0**	**2'848'715.5**	**2'794'103.1**

Source: EU organic import volume (MT): TRACES/European Commission

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