Europe and the European Union: Key indicators 2021

Indicator	Europe	European Union[1]	Top 3 countries in Europe
Organic farmland	17.8 million hectares (ha)	15.6 million ha	France (2.8 million ha); Spain (2.6 million ha); Italy (2.2 million ha)
Organic share of total farmland	3.6 %	9.6 %	Liechtenstein (40.2%); Austria (26.5%); Estonia (23.0%)
Increase in organic farmland 2020-2021	0.75 million ha	0.77 million ha	France (+0.23 million ha); Spain (0.20 million ha); Romania (+0.11 million ha)
Relative increase in organic farmland	4.4%	5.2%	North Macedonia (+109%); Bosnia&Herzegovina (+47.5%), Iceland (+36.7%)
Land use	Arable crops: 8.4 million ha Permanent crops: 2.0 M ha Permanent grassland: 6.9 million ha	Arable crops: 7.0 million ha Permanent crops 1.8 million ha Permanent grassland: 6.5 million ha	
Top arable crop groups	Cereals: 2.9 million ha Green fodder: 2.6 million ha Oilseeds: 0.9 million ha	Green fodder: 2.5 million ha Cereals: 2.4 million ha Dry pulses: 0.5 million ha	Largest arable areas: France (1.5 million ha); Italy (1.0 million ha); Germany (0.8 million ha)
Top permanent crop groups	Olives: 0.6 million ha Grapes: 0.4 million ha Nuts: 0.4 million ha	Olives: 0.6 million ha Grapes: 0.4 million ha Nuts: 0.4 million ha	Largest permanent crop areas: Spain (0.8 million ha; Italy (0.5 million ha); France (0.2 million ha)
Wild collection area	10.6 million ha	7.4 million ha	Finland (6.9million ha); Russia (0.8 million ha); North Macedonia (0.6 million ha)
Producers	442'274	378'226	Italy (75'874); France (58'413); Spain (52'861)
Processors	87'676	82'500	Italy (23'802); Germany (19'572); France (19'311)
Importers	7'590	6'378	Germany (2'016); France (662; 2019); Italy (579)
Retail sales	54.5 billion euros	46.7 billion euros	Germany (15.9 billion euros); France (12.7 billion euros); Italy (3.9 billion euros)
Growth of retail sales 2020-2021	3.8%	3.6%	Estonia (21.0 %); Luxembourg (15.3 %); Austria (5.8 %)
Organic share of the total market	No data	4.7%	Denmark (13.0 %); Austria (11.6%); Luxembourg (11.0 %)
Per capita consumption	65.7	104.3 euros	Switzerland (424 euros); Denmark (384 euros); Luxembourg (313 euros)
EU Organic imports		2.87 million metric tons (MT)[2]	Netherlands (0.95 million MT); Germany (0.52 million MT); Belgium (0.28 million MT)
Exports to EU		Bananas (0.72 million MT) Oilcake and sugar (0.21 million MT each)	Ecuador (0.35 million MT); Dom. Rep. (0.27 million MT); India (0.21 million MT);

Source: FiBL-AMI survey 2023. For detailed data sources, see annex

[1] Please note that the 2021 data for the European cover the 27 countries that were members of the European Union in 2021. The data exclude the United Kingdom and a direct year-to-year comparison of EU level data shown in previous editions of this yearbook is therefore not possible.

[2] Please note that the 2021 EU organic import data include imports from the UK, which were not included in the 2020 data.

Organic Farming and Market Development in Europe and the European Union

HELGA WILLER[1], BERNHARD SCHLATTER[2], JAN TRÁVNÍČEK[3], AND DIANA SCHAACK[4]

In 2021, the organic sector's development in Europe was characterised by continued growth in all key indicators. However, the organic market did not grow as fast as in 2020, when it increased double-digit due to the pandemic, whereas the organic area increased at a similar pace as in 2020. Both the organic farmland and market will need to grow at a faster rate to reach the 25 percent organic area share goal by 2030, as set out for the European Union 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 2021.

Furthermore, since 2021, the statistical office of the European Union Eurostat, the main data source for many European countries (not only the EU) does not provide the in-conversion data per crop anymore. For this edition, we, therefore, continued to use the previous conversion data in to show the total organic area by crop, as we did not want to communicate a drop in the crop areas when in fact there wasn't one.

1 Key facts and figures: Production and market highlights

Organic farmland

Almost 18 million hectares of farmland were organic in Europe in 2021 – France had the largest area

In Europe, 17.8 million hectares were managed organically in 2021 (EU: 15.6 million hectares). With almost 2.8 million hectares, France became the new number one in terms of farmland under organic management, followed by Spain (2.6 million hectares), Italy (2.2 million hectares) and Germany (1.8 million hectares). More than half of the European organic farmland is in these four countries.

European organic farmland increased by almost 0.8 million hectares

Organic land increased by 0.75 million hectares in Europe (with a major increase in farmland in France, but decreases in Turkey and Ukraine) and by almost 0.77 million

---

[1] Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[2] Bernhard Schlatter, Research Institute of Organic Agriculture FiBL, Frick, Switzerland, www.fibl.org
[3] Jan Trávníček, Czech Organics, Staré Město, Czech Republic, www.czechorganics.com
[4] Diana Schaack, Agrarmarkt Informations-Gesellschaft mbH, Bonn, Germany, www.ami-informiert.de

hectares in the European Union (EU), representing an increase of 4.4 percent in Europe and 5.2 percent in the EU. Growth was similar to that 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 3.6 percent of the total agricultural land and 9.6 percent in the European Union. In Europe (and globally), Liechtenstein has the highest organic share of all farmland (40.2 percent), followed by Austria, the country in the EU with the highest organic share of agricultural land (26.5 percent). Furthermore, EU countries that are already quite close to the goal include Estonia (23.0 percent) and Sweden (20.2 percent).

In Europe, almost half of the organic farmland is used for arable crops, strong growth of oilseeds

Both in Europe and the European Union, arable land is the most important land use type (almost 50 percent of the organic farmland), followed by permanent grassland (almost 40 percent) and permanent crops (a bit more than 10 percent). In Europe, the key arable crop group was cereals (2.95 million hectares) and for permanent crops olives (0.6 million hectares). The strongest growth in 2020-2021 was noted for oilseeds (+11.4 percent), whereas the highest area share (more than 10 percent) was reached by olives and grapes.

Organic operators

More than 440'000 organic producers in Europe

There were more than 440'000 organic **producers** in Europe (almost 380'000 in the European Union), with the largest numbers in Italy 75'874). The number of producers increased by 5.8 percent in Europe and by 8.2 percent in the European Union.

There were 87'676 organic **processors** in Europe (+3.1 percent compared to 2020) and 82'500 in the European Union (+5.2 percent). The country with the largest number of processors was Italy (23'802).

As in previous years, the number of **importers** grew faster than the number of processors: More than 7'500 (+11.1 percent) were counted in Europe and more than 6'300 in the European Union (+9.2 percent). Germany had the highest number of importers (2'016).

Retail sales

Retail sales passed the 50 billion euro mark – Market growth slowed down

Organic retail sales in Europe were valued at 54.5 billion euros (46.7 billion euros in the EU). The EU represents the second-largest single market for organic products in the world after the United States. With 15.9 billion euros in retail sales, Germany was the biggest market in Europe and the second-largest in the world.

The European and EU organic markets recorded a modest growth rate of not even 4 percent in 2021, thus considerably lower than the 15 percent increase in 2020, which was characterised by the Corona Pandemic. Also in 2021, some markets showed double-digit growth; the highest growth was observed in Estonia (+21 percent). From 2012–2021, Europe's and the European Union's organic market values more than doubled.

The highest organic market shares and per capita consumption 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 11.6 percent, and Switzerland reached 10.9.

European consumers spent 65.7 euros on organic food per person in 2021 (EU 104.3 euros). Per capita, consumer spending on organic food has doubled in the decade. Swiss and Danish consumers spent the most on organic food (425 and 384 euros, respectively).

Organic imports stagnating – Ecuador was the largest supplier; tropical fruit is the most important commodity group

Data on organic imports to the European Union in 2021 show that 2.87 million metric tons of organic products were imported. Compared to 2020, this is an increase of three percent.[1]

The largest supplier was Ecuador (0.35 million MT) and the key product group was tropical fruits (0.8 million MT), which increased. Decreases were noted for cereals and oilseed imports. The largest EU importer was the Netherlands, which acts as a re-exporter for other European countries.

[1] It should be noted that in 2020, organic imports from the UK, which exported 0.1 million MT into the EU in 2021, were not included. The 2021 data is therefore not strictly comparable with the 2020 data.

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

2.1 Organic agricultural land

- In 2021, 17.8 million hectares were farmed organically in Europe and 15.6 million hectares in the European Union (Table 63).
- The countries with the largest organic farmland areas were France (16 percent of Europe's organic farmland), followed by Spain, Italy and Germany. More than half of Europe's organic farmland (and almost 60 percent of the European Union's organic farmland) was in these countries (Figure 72).
- More than one-fifth of the world's organic farmland was in Europe (23 percent).

2.2 Organic shares of total agricultural land

- In Europe, 3.6 percent of the agricultural land was organic in 2021, and in the European Union (EU), 9.6 percent (Figure 74).
- In 15 countries (European Union: 13), 10 percent or more of agricultural land was managed organically (Figure 74).
- The countries with the highest organic area shares were Liechtenstein (40.2 percent), Austria (26.5 percent), Estonia (23.0 percent) and Sweden (20.2 percent). Liechtenstein is the country with the highest organic farmland share in the world.

2.3 Growth of organic agricultural land

- In 2021, the organic agricultural land in Europe increased by almost 0.75 million hectares (EU: 0.77 million hectares) or 4.4 percent (EU: 5.2 percent).
- The countries that contributed the most to the growth were France, Spain and Romania, adding more than 500'000 hectares (Figure 77).
- The highest relative increases were in North Macedonia (+109% percent), and Bosnia and Herzegovina (+47.5 percent). As mentioned above, some countries showed a decrease in organic land, most notably Bulgaria (-25.8 percent) (Figure 75).

Table 67: Europe: Organic agricultural land in Europe and the European Union 2021

	Organic area [million ha]	Organic share [%]	Change 2020-2021 [%]	Change 2020-2021 [million ha]	Change 2012-2021 [%]	Change 2012-2021 [million ha]
European Union	15.6	9.6%	5.2%	+0.77	77.1%	6.8
Europe	17.8	3.6%	4.4%	+0.75	69.2%	7.3

Source: FiBL-AMI survey 2023 based on Eurostat and national data sources. For country details, see Table 73

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 74). As mentioned above, data on in-conversion area is no longer available for crop details in most countries, because Eurostat has changed its data collection system.

- In Europe, of the 17.8 million hectares of organic agricultural land, at least 11.7 million hectares were fully converted[1] (10.6 million out of 15.6 million hectares in the European Union).
- At least 2.2 million hectares were under conversion (2.1 million in the European Union). The conversion area suggests that, in the future, an increase in the supply of organic products can be expected. However, the conversion area in the European Union has decreased in terms of hectares even though total organic farmland increased.
- By country, the largest in-conversion areas are in Western and Southern European countries. Please note that not all countries provided updated data (Table 74).

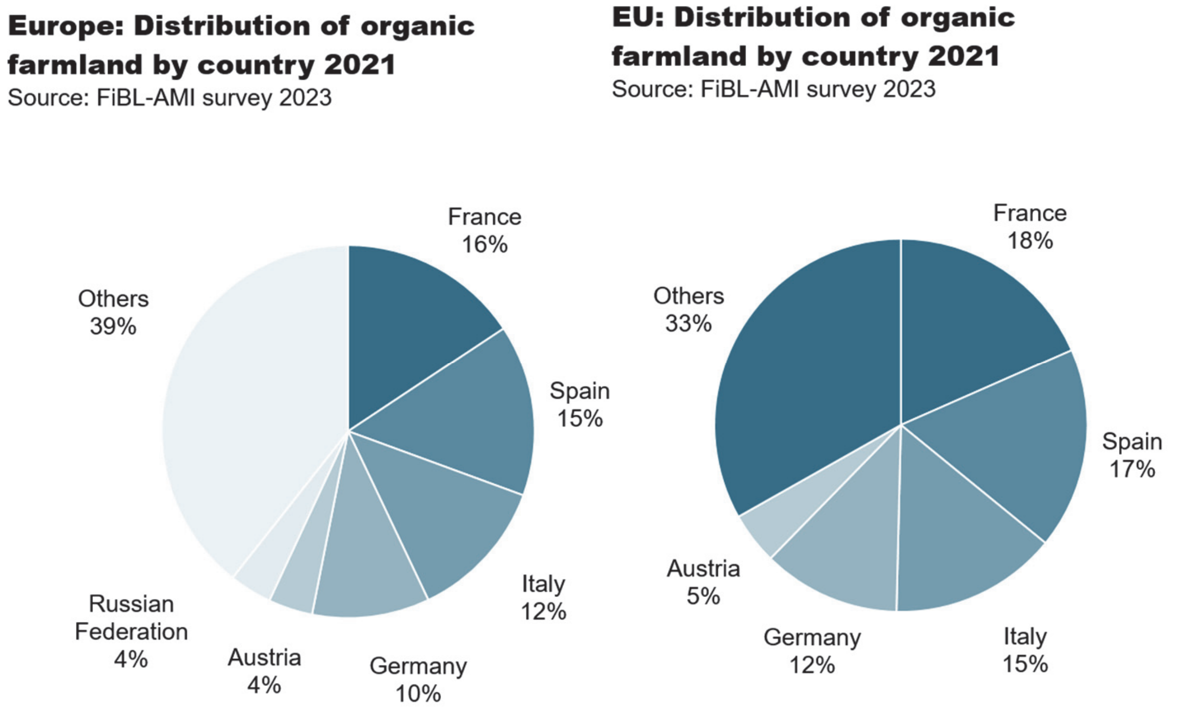


Figure 72: Europe and European Union: Distribution of organic farmland by country 2021

Source: FiBL-AMI survey 2023 based on national data sources and Eurostat
For detailed data sources, see annex

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

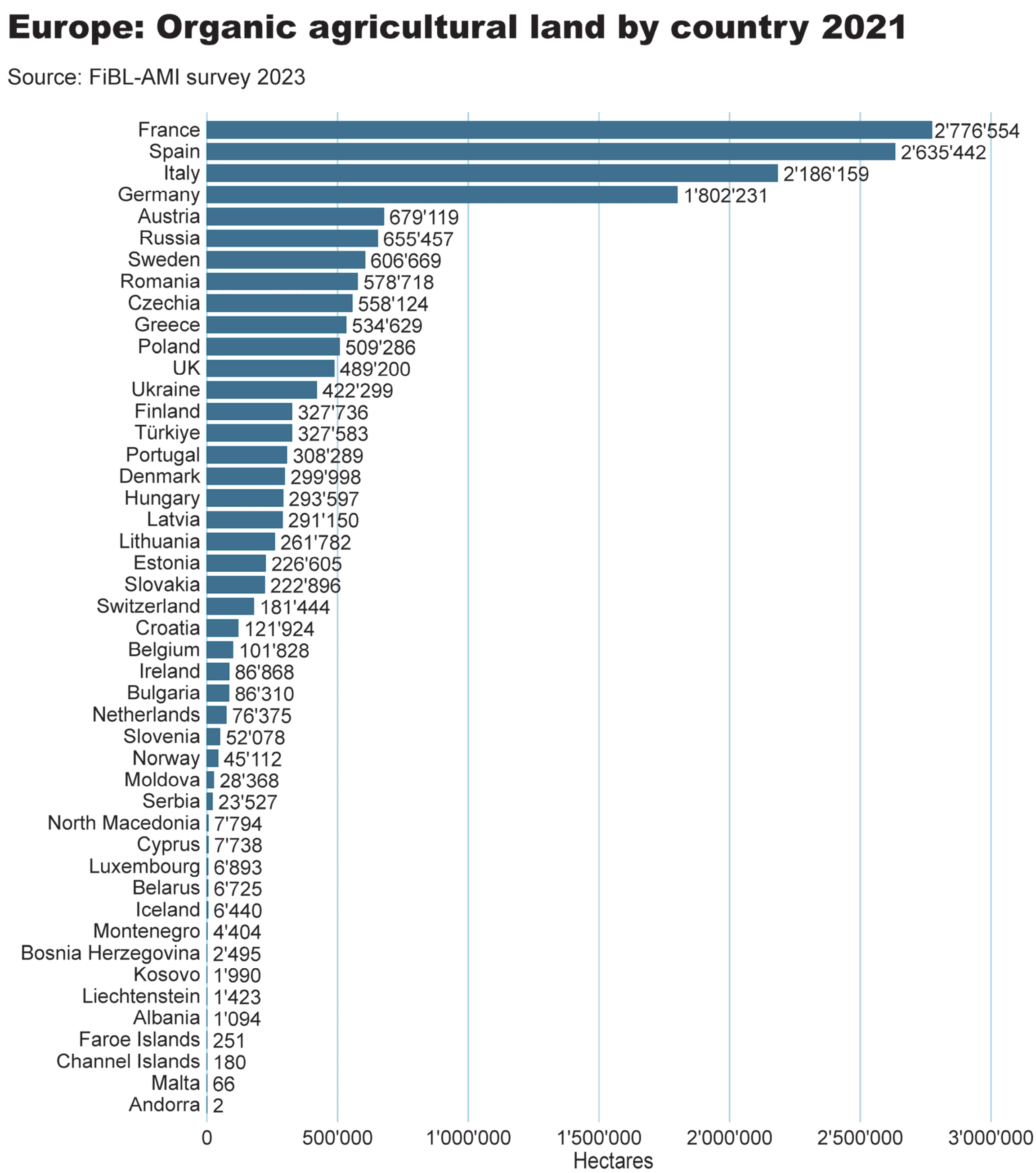


Figure 73: Europe: Organic agricultural land by country 2021

Source: FiBL-AMI survey 2023 based on Eurostat national data sources.
For detailed data sources, see annex.

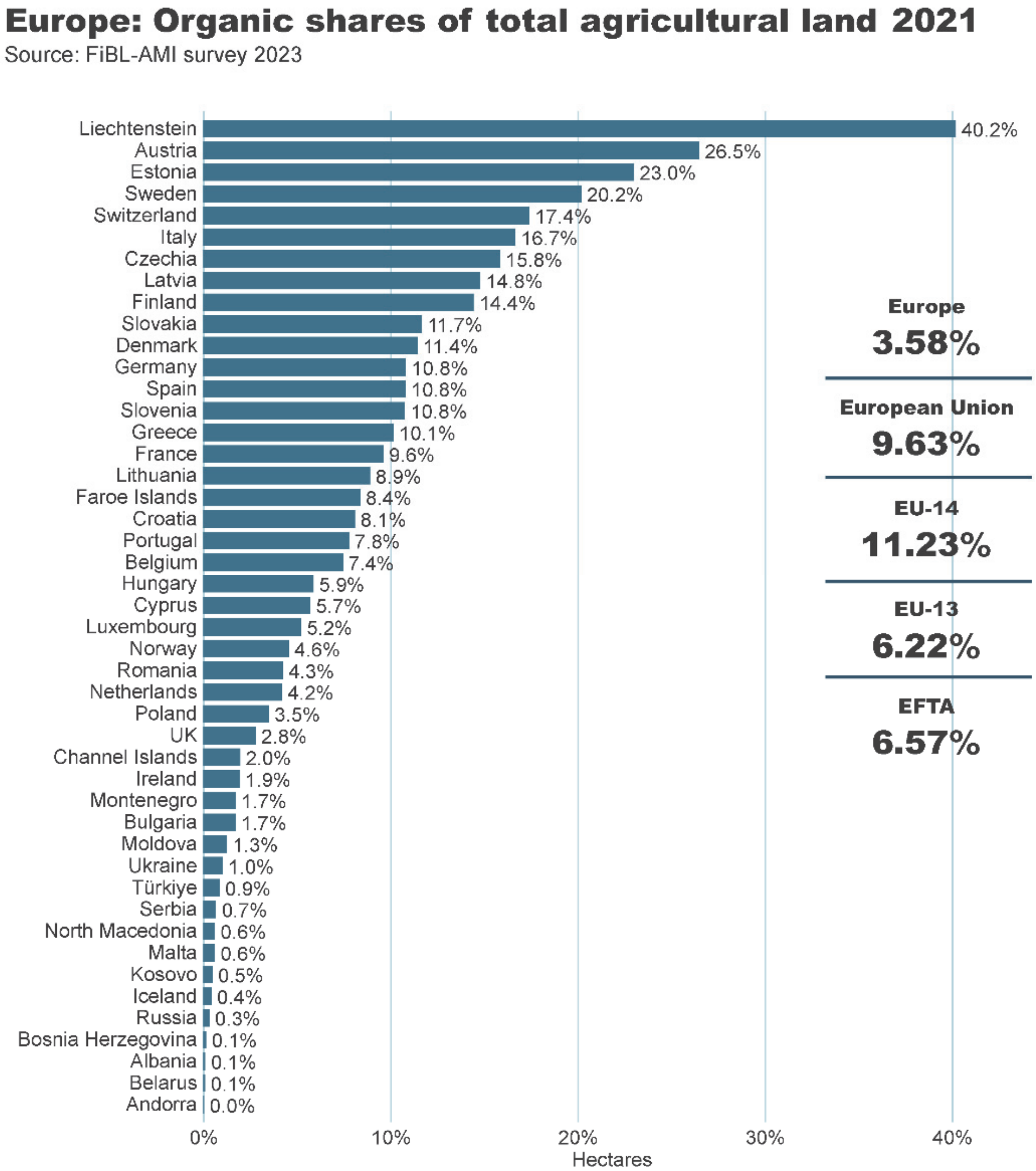


Figure 74: Europe: Organic shares of total agricultural land 2021

Source: FiBL-AMI survey 2023 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).

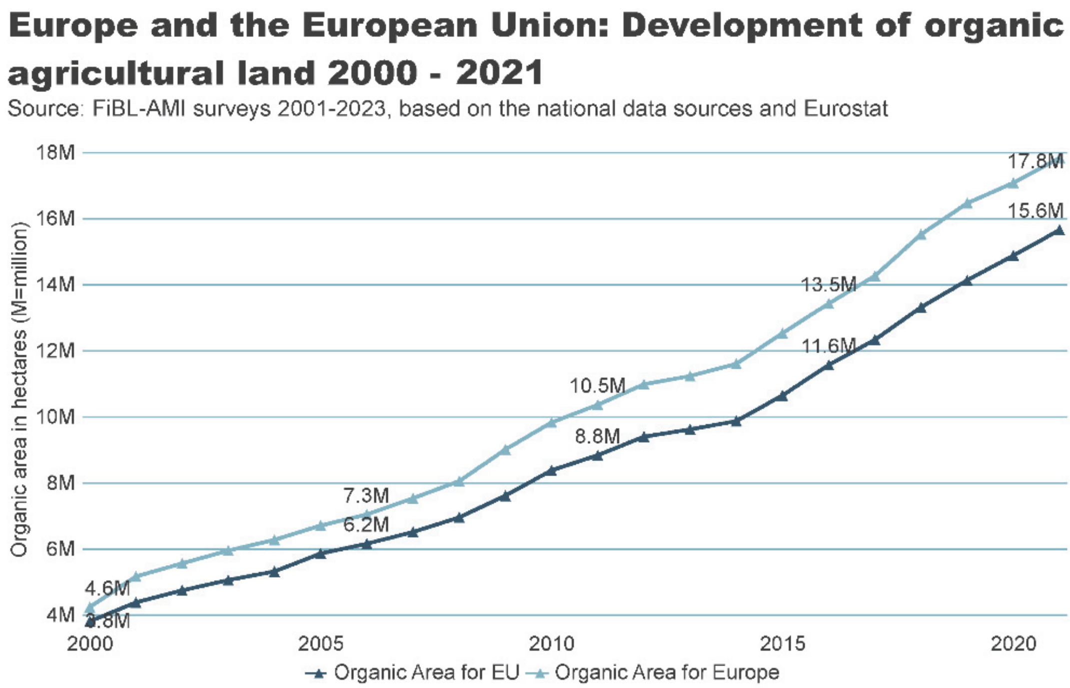


Figure 75: Europe and the European Union: Development of organic agricultural land 2000-2021

Source: FiBL-AMI Surveys 2006-2021 based on national data sources and Eurostat. The data for the European Union covers all countries that were members of the European Union in 2021

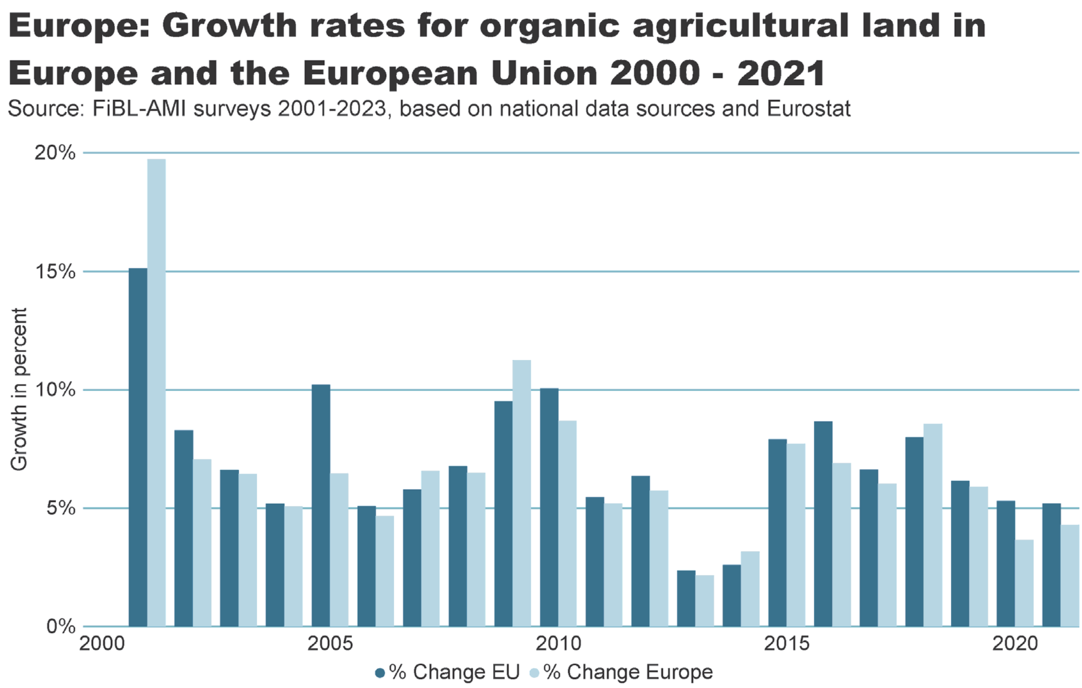
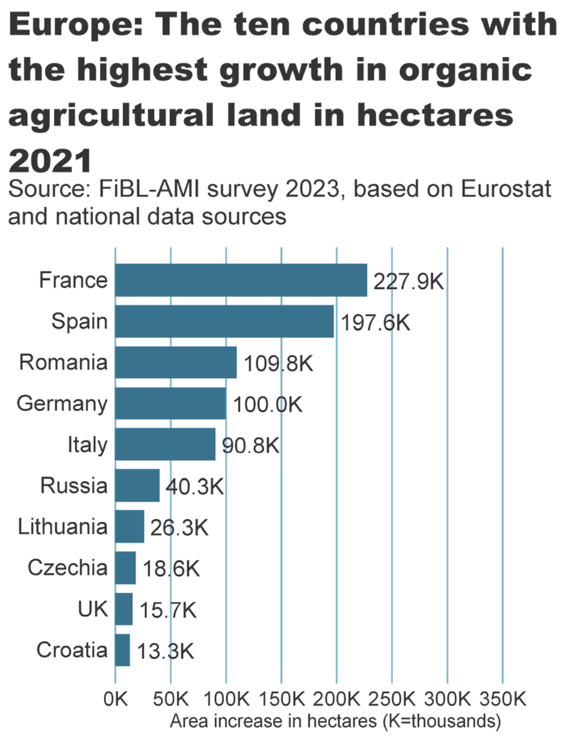


Figure 76: Europe: Growth rates for organic agricultural land in Europe and the European Union 2000-2021

Source: FiBL-AMI Surveys 2002-2023 based on national data sources and Eurostat



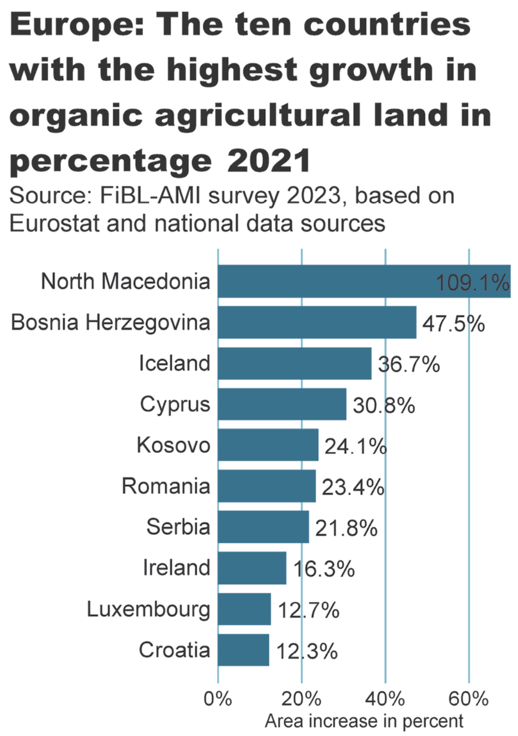


Figure 77: Europe: The ten countries with the highest growth in organic agricultural land in hectares and relative growth in 2021

Source: FiBL-AMI survey 2023 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, 2021 updates on land use and crops were not or only partly available. Furthermore, in-conversion areas for crops are not available anymore, which means that for those countries, where we receive the data from Eurostat estimates had to be made on the current organic areas by crop (fully converted and in-conversion), using the in-conversion data from the previous years.

Table 68: Europe and the European Union: Land use 2021

Crop group	Europe [Million hectares] (Share of total)	European Union [Million hectares] (Share of total)	Change 2020-2021 Europe/EU [%]	Change 2012-2021 Europe/EU [%]
Arable land	8.5 (3.8%)	7.1 (7.1%)	+3.9%+4.4%	+71.6%/+78.9%
Permanent grassland	6.9 (4.0%)	6.5 (12.7%)	+2.7%/+2.6%	+41.1%/+50.1%
Permanent crops	2.0 (11.5%)	1.8 (14.7%)	+4.8%+/7.2%	83.5%/83.0%
Total	**17.8 (3.6%)**	**15.6 (9.6%)**	**+4.4%/+5.2%**	**60.0%/66.5%**

Source: FiBL-AMI survey 2023 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 68, Figure 78 and Figure 81 show that **arable land** constitutes a large part of organic farmland, with almost 8.5 million hectares in Europe and 7.1 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 arable land grew faster in the past years than the organic grassland did.
- **Permanent grassland** accounted for 6.9 million hectares in Europe and 6.5 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 81).
- **Permanent crops** constituted 11.5 percent of the total permanent cropland in Europe and 14.7 percent in the European Union, with 2.0 and 1.8 million hectares, respectively.

[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.

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 7.1 percent of that in the EU.
- Whereas the organic share of total **permanent grassland** areas was as high as 12.7 percent in the European Union, it was considerably lower in Europe as a whole (4.0 percent).
- **Permanent crops** had the highest organic area shares: 11.5 percent in Europe and 14.7 percent in the EU.

Increase by land use type

- The largest increase in 2021-2021 was in **permanent crops** (a 5.7 percent increase in Europe and a 6.1 percent increase in the EU), mainly because additional organic permanent crop area was reported for Spain.
- **Permanent grassland** increased by 2.7 percent in Europe and 2.6 percent in the EU (Table 68, Figure 79, Figure 80.).
- The **arable farmland** grew by 3.9 percent in Europe and 4.4 percent in the EU. From 2012 to 2021, arable land grew in Europe by 71.6 percent and in the EU by 78.9 percent, thus showing a greater increase than the permanent crops or permanent grassland (Table 68, Figure 79, Figure 80). These numbers show the intensification of organic agriculture as the relevance of grassland is decreasing, whereas arable land is gaining importance.

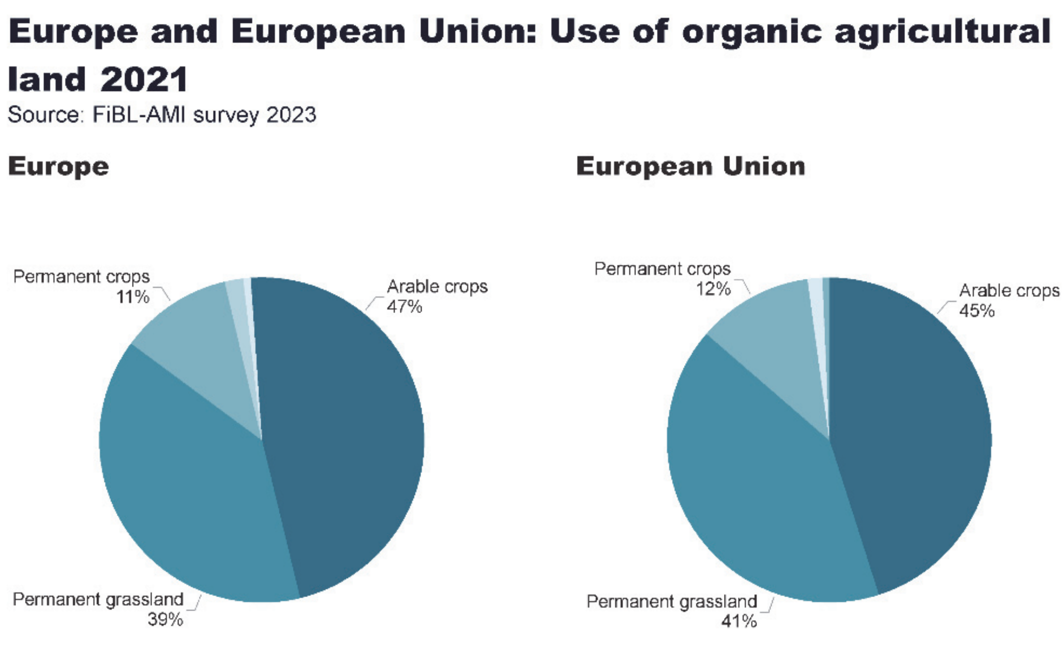


Figure 78: Europe and European Union: Distribution of land use in organic agriculture 2021

Source: FiBL-AMI survey 2023 based on Eurostat and national data sources

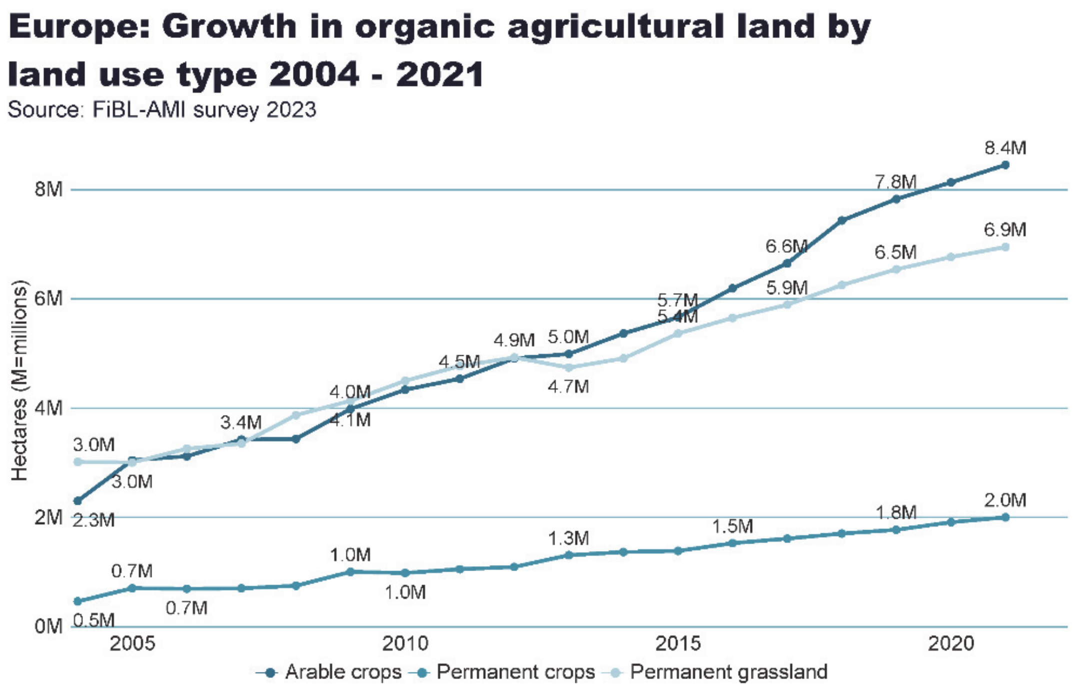


Figure 79: Europe: Growth in organic agricultural land by land use type 2004-2021

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

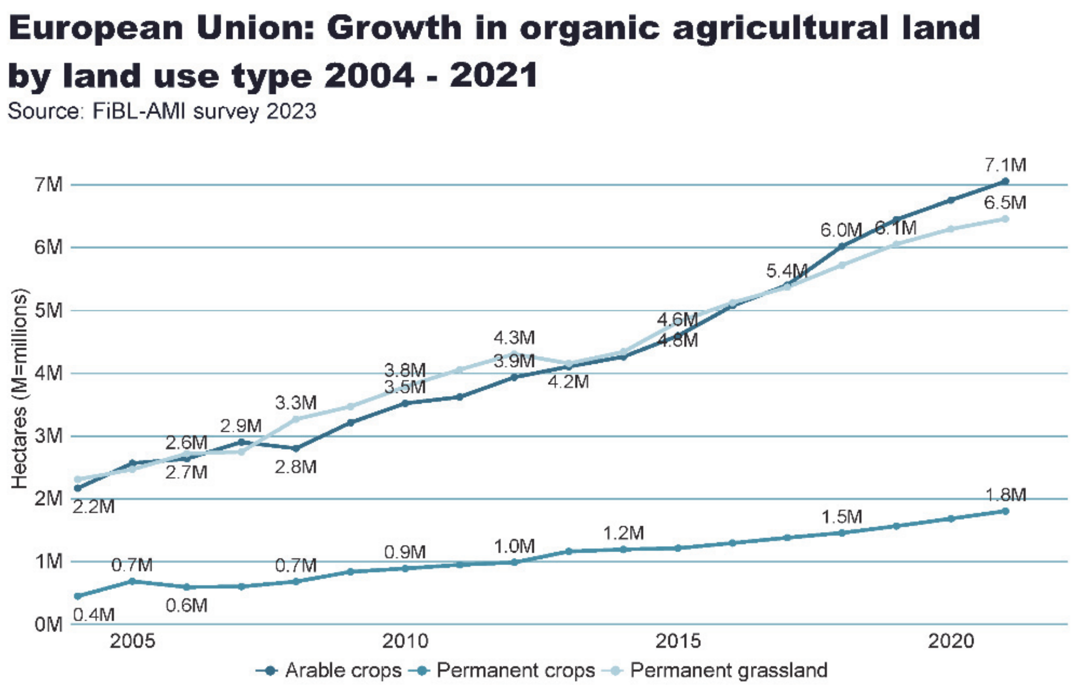


Figure 80: European Union: Growth in organic agricultural land by land use type 2004-2021

Source: FiBL-AMI Surveys 2006-2023 based on national data sources and Eurostat

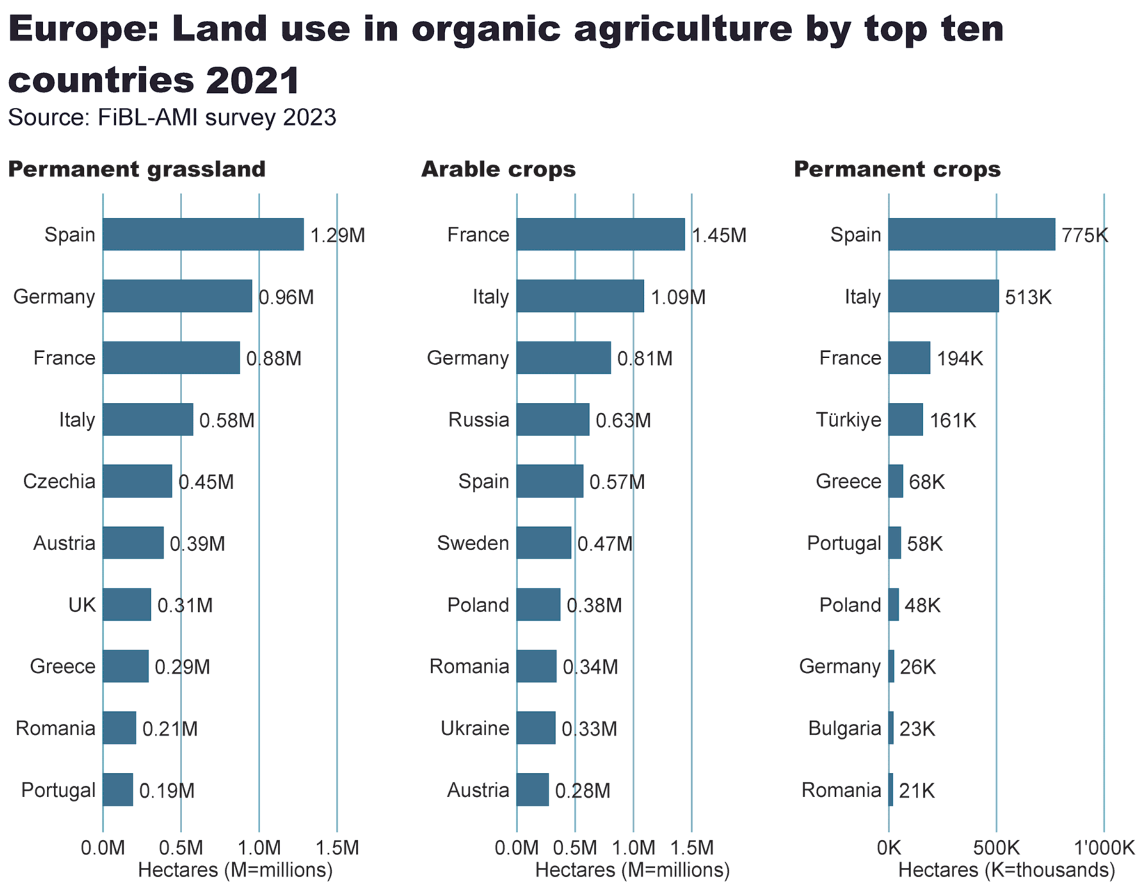


Figure 81: Europe: Land use in organic agriculture - top 10 countries 2021

Source: FiBL-AMI survey 2023 based on Eurostat and national data sources

3.2 Crops grown in organic agriculture

In 2021, all key arable and permanent crop groups showed growth in the European Union (Table 69).

Arable crops

- A large proportion of the organic arable land is used to produce cereals and green fodder, which account for almost 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 showed by far the highest increase in land area. Both from 2020 to 2021 and the 2012-2021 period, the largest growth was noted for oilseeds, which more than trebled in Europe and increased by 400 percent in Europe, with the Russian Federation (soybeans, sunflowers and rapeseed) and Ukraine (soybeans and sunflowers) being the largest producers. Oilseeds are the basis for important

feedstuffs. For more information about crop groups by country, see the crop chapters in this book (page 84) and our online database at statistics.fibl.org.

Permanent crops

– A large part of the permanent cropland is used to grow olives, grapes, and nuts. Olives cover almost 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.
– In 2021, the area for all key permanent crops except nuts decreased (Table 69).[1]

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

Table 69: Europe and the European Union: Key crops/crop group 2021

	Crop group	Area (ha)		Organic share (%)		Change 2020-2021 (%)		Change 2012-2021 (%)	
		Europe	EU	Europe	EU	Europe	EU	Europe	EU
Arable crops	Cereals	2’947’005	2’407’885	2.2%	4.6%	-2.8%	-1.5%	54.3%	60.1%
	Dry pulses	569’895	495’554	9.8%	23.7%	1.2%	3.7%	125.8%	119.2%
	Fresh vegetables	230’155	202’261	5.1%	10.1%	-3.1%	-5.7%	134.3%	159.6%
	Green fodder	2’624’762	2’461’719	11.5%	11.7%	-2.4%	-2.6%	34.3%	52.2%
	Oilseeds	921’718	452’349	2.4%	4.1%	11.4%	9.1%	378.7%	201.4%
	Root crops	57’889	56’018	0.7%	1.8%	3.7%	7.6%	26.2%	90.2%
Permanent crops	Berries	41’281	36’157	13.3%	24.1%	-9.3%	-4.2%	46.1%	39.1%
	Citrus fruit	54’904	54’113	7.9%	10.4%	-7.8%	-7.9%	116.7%	119.5%
	Fruit, temperate	156’654	135’970	5.7%	11.2%	-9.5%	-3.6%	23.2%	24.2%
	Fruit, (sub)tropical	38’565	21’982	16.0%	13.1%	-10.9%	5.3%	134.6%	281.2%
	Grapes	435’216	422’736	11.2%	13.3%	-0.9%	-0.8%	80.1%	84.0%
	Nuts	437’525	378’595	15.9%	27.5%	16.2%	16.1%	153.7%	148.5%
	Olives	618’525	557’726	10.2%	10.9%	-1.1%	-0.5%	35.5%	32.8%

Source: FiBL-AMI survey 2023 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 84 and statistics.fibl.org

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: 7.4 million hectares). The largest wild collection area in Europe (and in the world) was in Finland with 6.9 million hectares (mainly berries). For country details on wild collection areas, see Table 76.

[1] This may be partly attributed to the fact that Eurostat does not provide the total organic area for the crops anymore, only for fully converted. It should be noted though that FiBL made an estimate for the total organic area per crop.

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 70, the development is not shown for the number of exporters.

Table 70: Europe and European Union: Organic operators 2021

	Europe			European Union		
	No.	Growth 1 year	Growth 10 years	No.	Growth 1 year	Growth 10 years
Producers	442'274	5.8%	38.0%	378'226	8.2%	51.8%
Processors	87'676	3.1%	91.1%	82'500	5.2%	93.4%
Importers	7'590	11.1%	132.8%	6'378	9.2%	111.2%
Exporters	3'118	N/A%	N/A	2'404	N/A	N/A

Source: FiBL-AMI survey 2023 based on national data sources and Eurostat. For a breakdown by country, see. annex.

Organic producers

- In 2021, there were more than 440'000 organic **producers** in Europe and almost 380'000 in the European Union (Table 70 and Table 77). The country with the largest number of producers was Italy (more than 70'000 (Figure 84).
- Growth in the European Union (+8.2 percent) was stronger than in Europe as a whole (5.8 percent). Over the decade 2012-2021, the number of producers in Europe increased by 38 percent (EU: 52 percent). A bit more than ten percent of the world's organic farmers are in Europe (Figure 82).

Organic processors and importers

- There were more than 87'000 organic processors in Europe (+2.9 percent compared to 2019) and more than 82'000 in the European Union (+4.9 percent).
- The country with the largest number of processors was Italy.
- The importers continued to be the fastest growing group: More than 7'500 importers (+11.1 percent growth) were counted in Europe and more than 6'300 in the European Union (+9.2percent).
- Germany was the country with the most importers (2'016) (Table 70, Table 77, Figure 83).

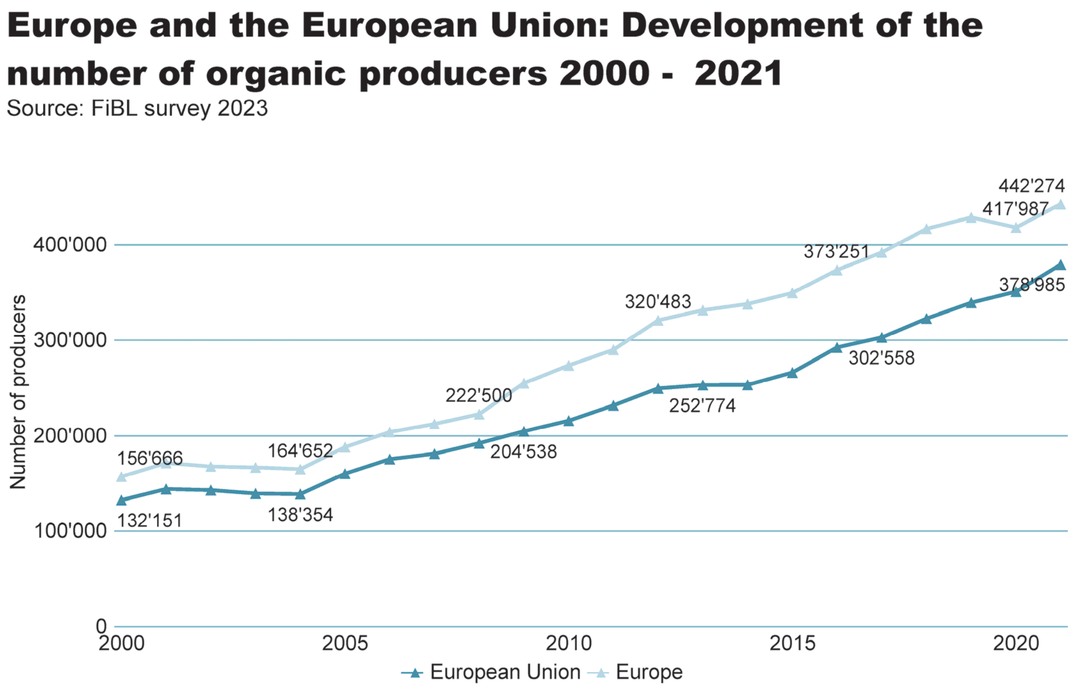
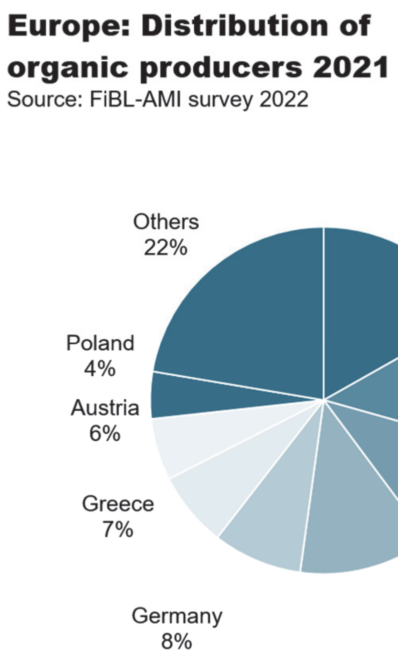


Figure 82: Europe and the European Union: Development of the number of organic producers 2000-2021

Source: FiBL-AMI surveys 2002-2023 based on national data sources and Eurostat



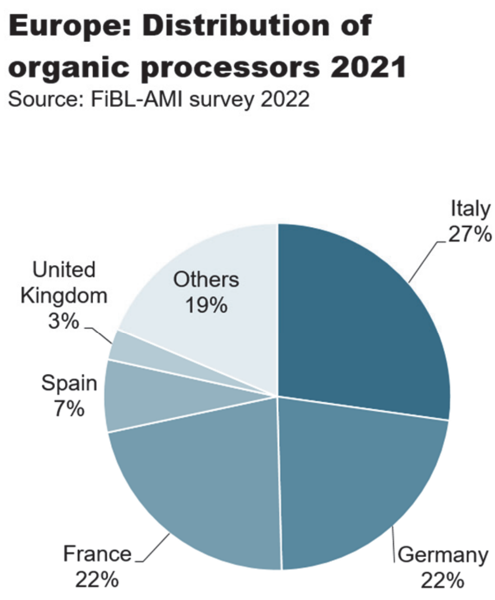


Figure 83: Europe: Distribution of organic producers and processors by country 2021

Source: FiBL-AMI survey 2023, based on national data sources and Eurostat

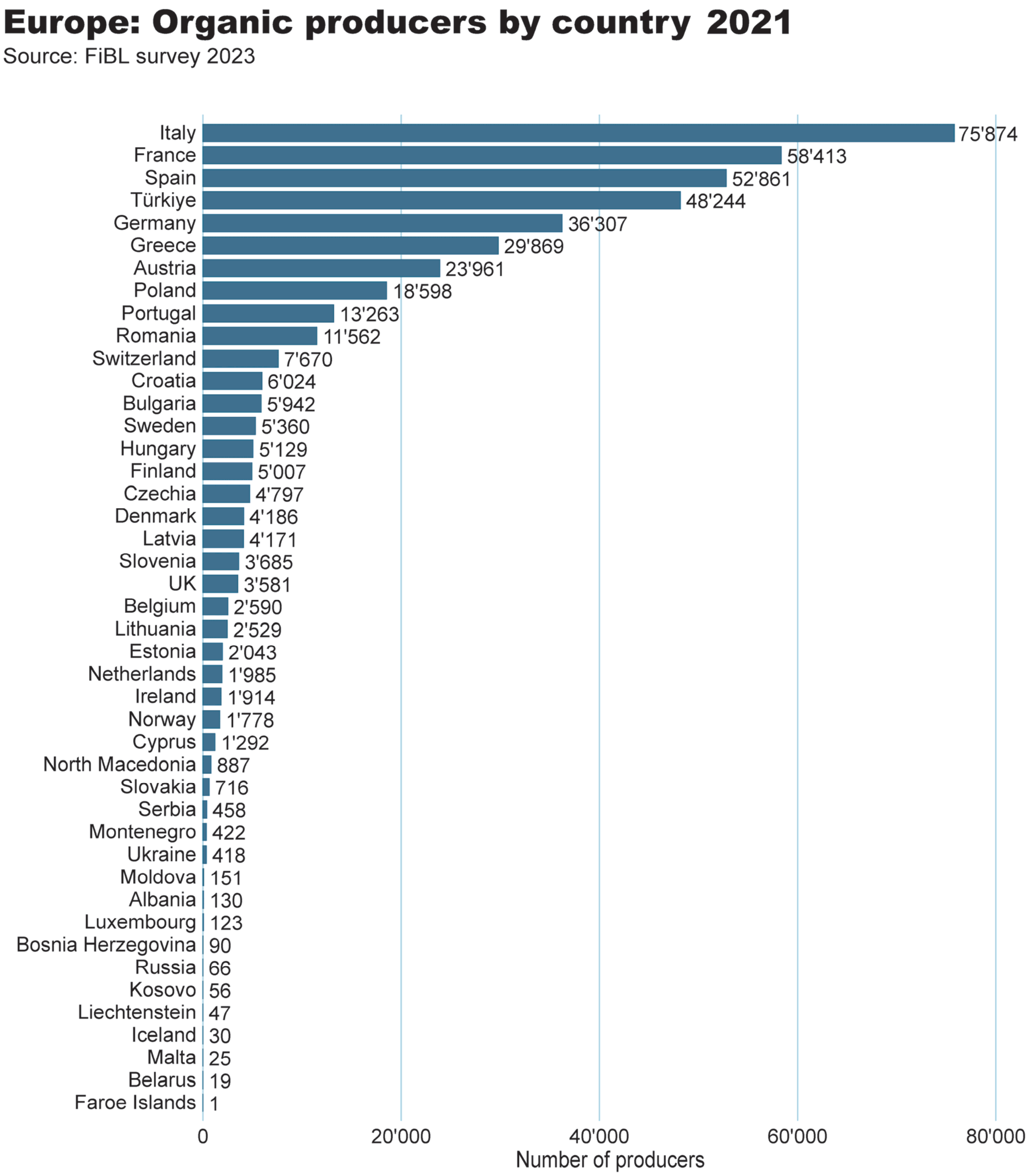


Figure 84: Europe: Number of organic producers by country 2021

Source: FiBL-AMI survey 2023 based on national data sources and Eurostat. For detailed data sources, see annex.

5 Organic imports and exports

The European Union, which is the second-biggest organic market, provided data on its organic imports, showing, for the fourth time, the key import products and key importing countries (based on volume in metric tons MT). Furthermore, the United States has both export and import data (volume and value). Some European countries provide export and import values. As the data is not complete (apart from the EU organic imports), it is difficult to conclude on total values and growth rates for Europe as a whole.

For this chapter we have compiled organic import volumes (metric tons) into the EU and US as well as import and export values (in million euros). Available data is displayed in Table 79.

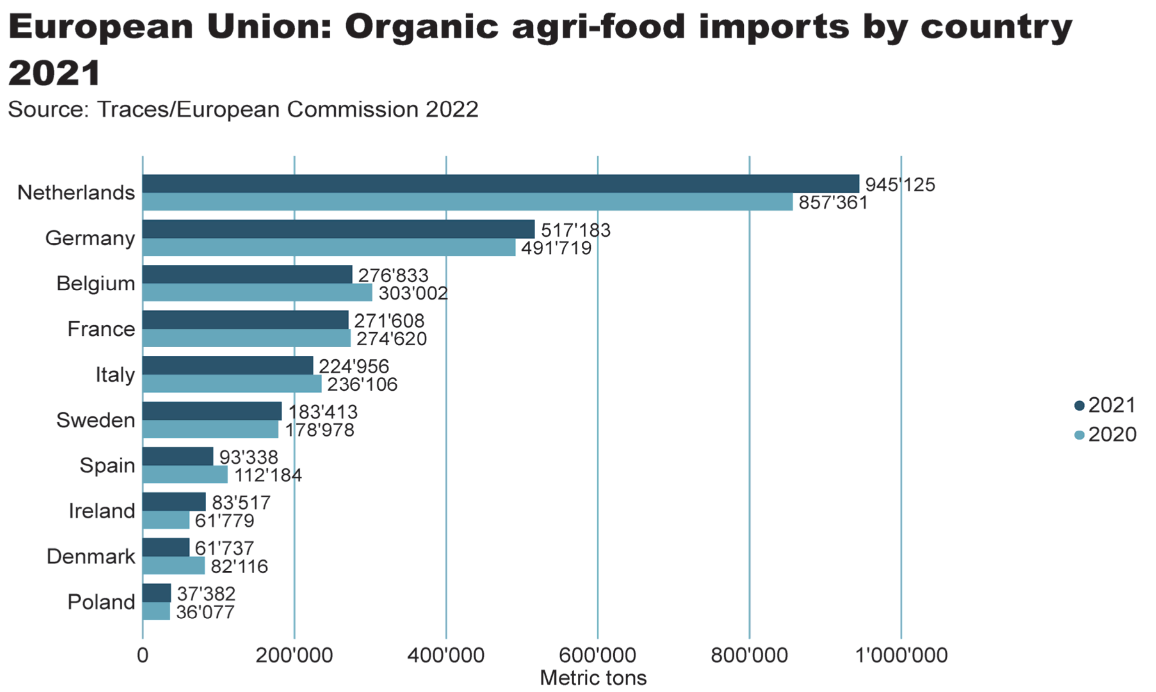


Figure 85: EU organic imports: Top 10 EU importers of organic products

Source Trace/European Commissions

- **Import volumes**: In 2021, the EU imported a total of 2.87 million MT of organic agri-food products.
- **By importing country**: The biggest importers (based on import volume in metric tons) were the Netherlands (0.95 million MT), followed by Germany and Belgium. For the Dutch imports, it should be noted that a large part of the goods is resold to other EU countries. For a full list, see Table 80.
- **Increase in 2021:** Compared to 2020, EU organic imports increased by 2.8 percent (Figure 54). It should be noted though that in 2020, EU organic imports from the UK, which constituted 0.1 million MT in 2021, were not yet included; thus the 2020 and 2021 data are not strictly comparable.

- **EU organic import volume by product:** Bananas were the most important product with 0.72 million MT (one-quarter of all EU organic imports), followed by oil cakes and sugar with 0.2 million MT each.
- **European export volumes:** According to the combined US and EU data, a volume of at least 0.68 million metric tons was exported to the United States from European countries, with 0.24 million MT coming from Ukraine.
- **European export and import value:** Not much data is available on this. Italy showed the largest export value (2.9 billion euros), and France had the highest import value (2.8 billion euros). No such data was available from Germany, the biggest market in Europe.
- **EU import volume by exporting country:** Ecuador was the biggest supplier of organic agri-food products to the EU, with 0.35 million MT; this corresponds to 12.0 percent of the total organic import volume. The largest increase in volume was noted for India (an increase of more than 30’000 MT). The UK, for which export data to the EU had not been available previously, supplied more than 100’000 MT of products.

For more information, see the contribution about EU organic imports on page 137.

6 Organic retail sales

In 2021, the organic market in Europe grew to 54.5 billion euros (European Union: 46.7 billion euros), but at a considerably slower rate than in the previous years, and other than in the past the market grew slower than the organic farmland. Unfortunately, not all countries provide data on their domestic markets regularly (Table 78), and it may be assumed that the market is larger than indicated by the figures in Table 71 and Table 78.

Table 71: Europe and the European Union: Organic retail sales 2021: Key data

	Retail sales [Million €]	Per capita consumption [€]	Growth 2020-2021 [%]	Growth 2012-2021 [%]
Europe	54’539.0	65.7	3.8%	140.2%
European Union	46’665.0	104.3	3.6%	148.8%

Source: FiBL-AMI survey 2023 based on national data sources. For country details, see annex.
Please note that the EU number is not comparable to what was communicated in previous years as only the countries that were a member of the EU in 2021 were included.

6.1 Size of the organic market

Germany continued to be the largest market in Europe (almost 16 billion euros) (Figure 87), 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 87).

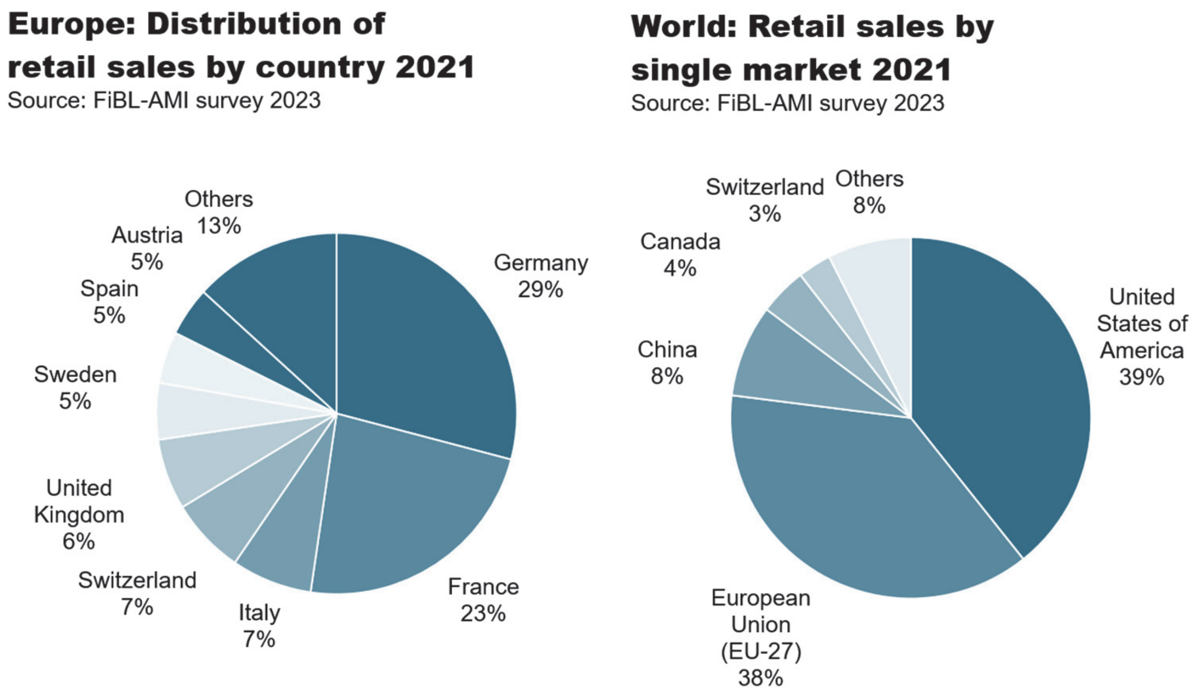


Figure 86: Europe: Distribution of retail sales by country and by single market worldwide 2021

Source: FiBL-AMI survey 2023 based on national data sources

Comparing organic markets by single markets, the United States had the lead. Thirty-nine percent of global organic retail sales were in the United States (48.6 billion euros), followed by the European Union (46.7 billion euros; 38, Figure 86).

Comparing retail sales by continent, Europe had 44 percent (54.5 billion euros), whereas North America constituted 43 percent (53.9 billion euros). Thus the picture has changed compared to 2020, when North America had the lead; a change, which must partly be attributed to the fluctuating euro – US dollar exchange rate.

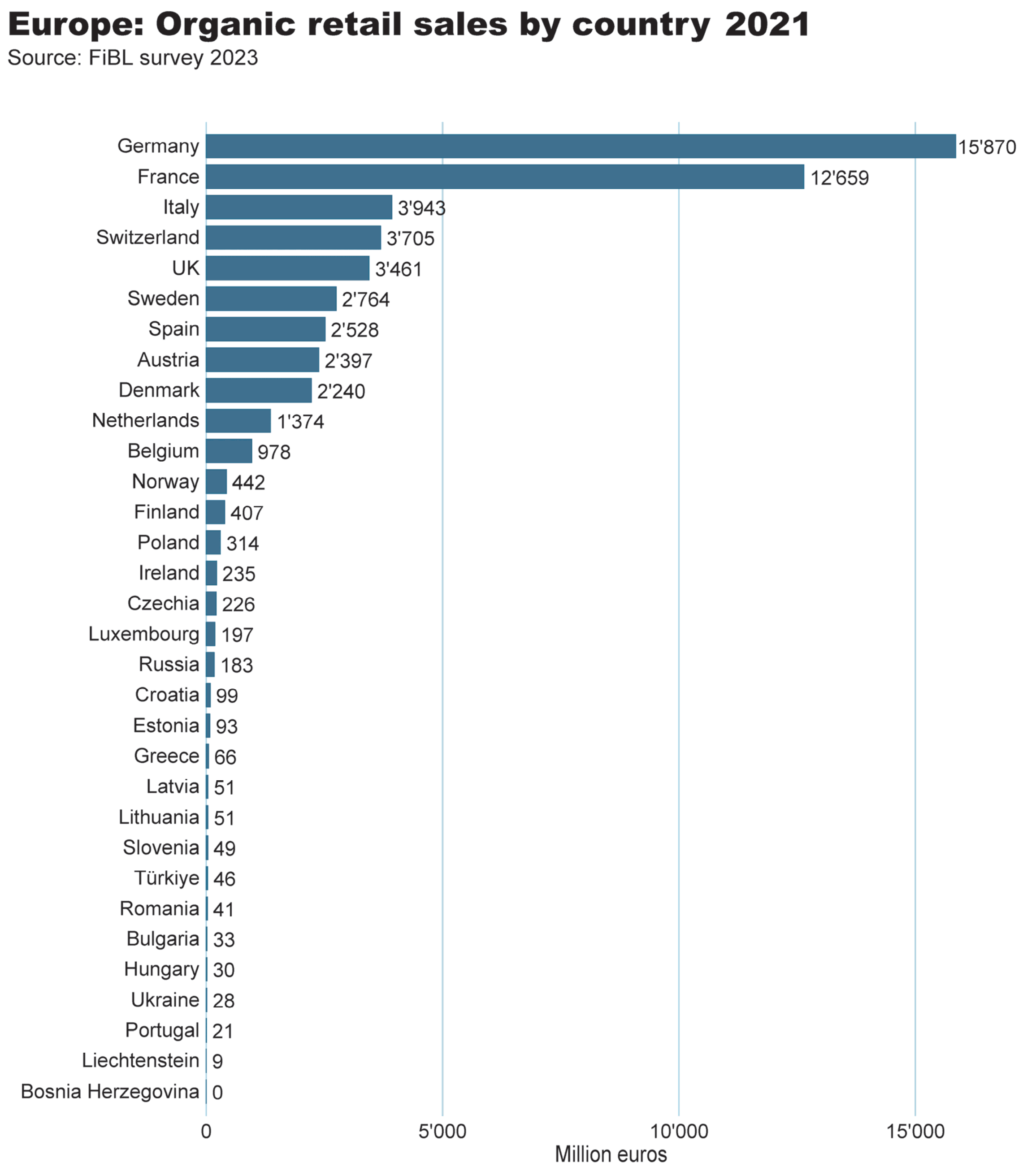


Figure 87: Europe: Retail sales by country 2021

Source: FiBL-AMI survey 2023 based on national data sources. Please note that 2021 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 approximately 3.8 and 3.6 percent, respectively, the lowest growth rate in more than a decade (see section 6.7 of this subchapter). From 2012 to 2021, the organic market more than doubled in size (Figure 88).

Most countries for which new data were available showed growth: most of these grew single digits (Figure 89). An exception were Estonia and Luxembourg which grew by 21 and 15 percent, respectively (Figure 89, Table 78).

6.3 Per capita consumption of organic food

Like in the previous years, the highest per capita consumption of organic food was in Switzerland (425 euros) and Denmark (384 euros). Switzerland is the number one in the world in terms of per capita consumption. Nine countries had a per capita consumption of more than 100 euros in 2021 (Figure 90, Table 78).

The continual growth in consumer interest is well documented by the development of per capita consumption, with a specific notable increase in 2020 but slower growth in 2021 (Figure 91). The per capita consumption in Europe rose to 65.7 euros and to 104.3 euros in the European Union.

In Central Eastern European countries, consumer spending is still low (Table 78). 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.

6.4 Organic market shares

The organic share of 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 (11.6 percent) and Switzerland (10.9 percent) (Figure 92, Table 78). Market shares of individual products and product groups can be far higher; these data are provided in Table 72.

In the past, in many countries, the total food market was not growing, and food prices were decreasing, which made organic shares of the total market grow even faster. The pandemic interrupted that development and caused the general food markets to grow rapidly. Furthermore, the war in Ukraine, the high energy costs and the increased cost of living have spurred inflation in many countries and conventional food has become significantly more expensive again. This development has also had an effect on the organic market shares.

---

[1] Estonia, Latvia and Lithuania.

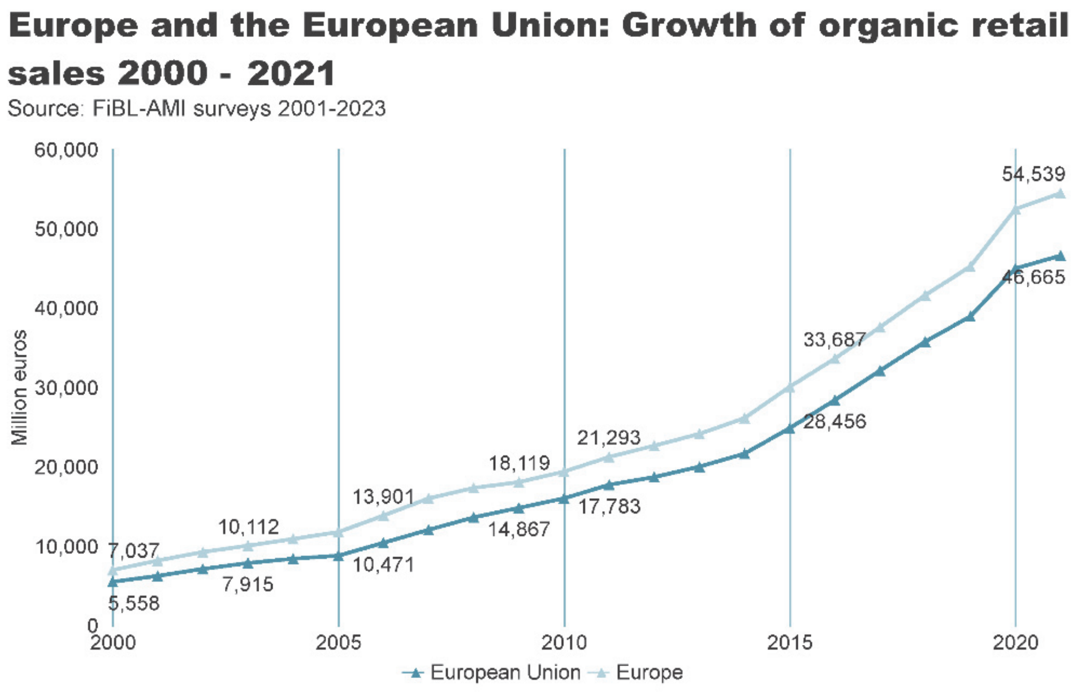


Figure 88: Growth of organic retail sales in Europe and the European Union, 2000-2021

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

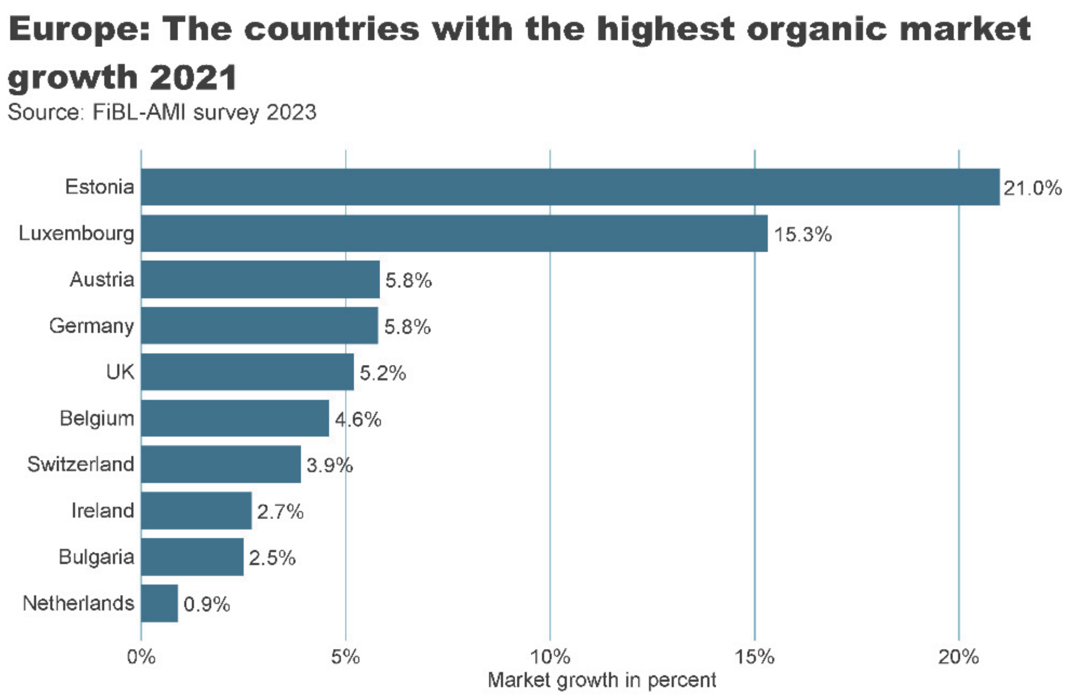


Figure 89: Europe: The countries with the highest organic market growth 2021

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

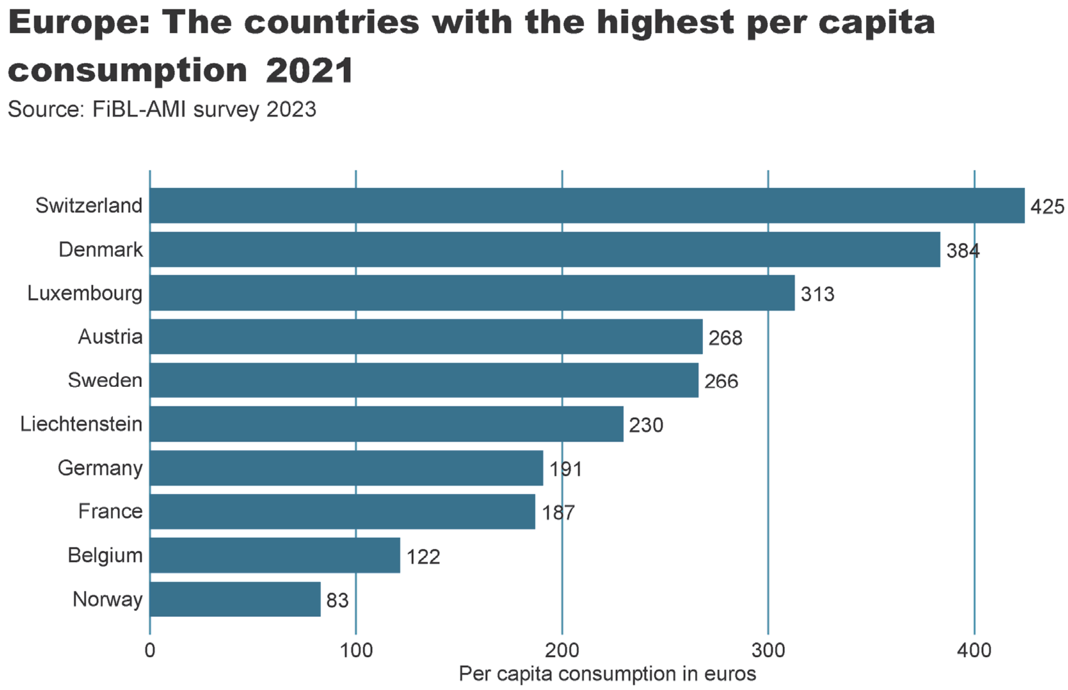


Figure 90: Europe: The countries with the highest per capita consumption 2021

Source: FiBL-AMI survey 2023 based on national data sources. For detailed data sources, see annex.

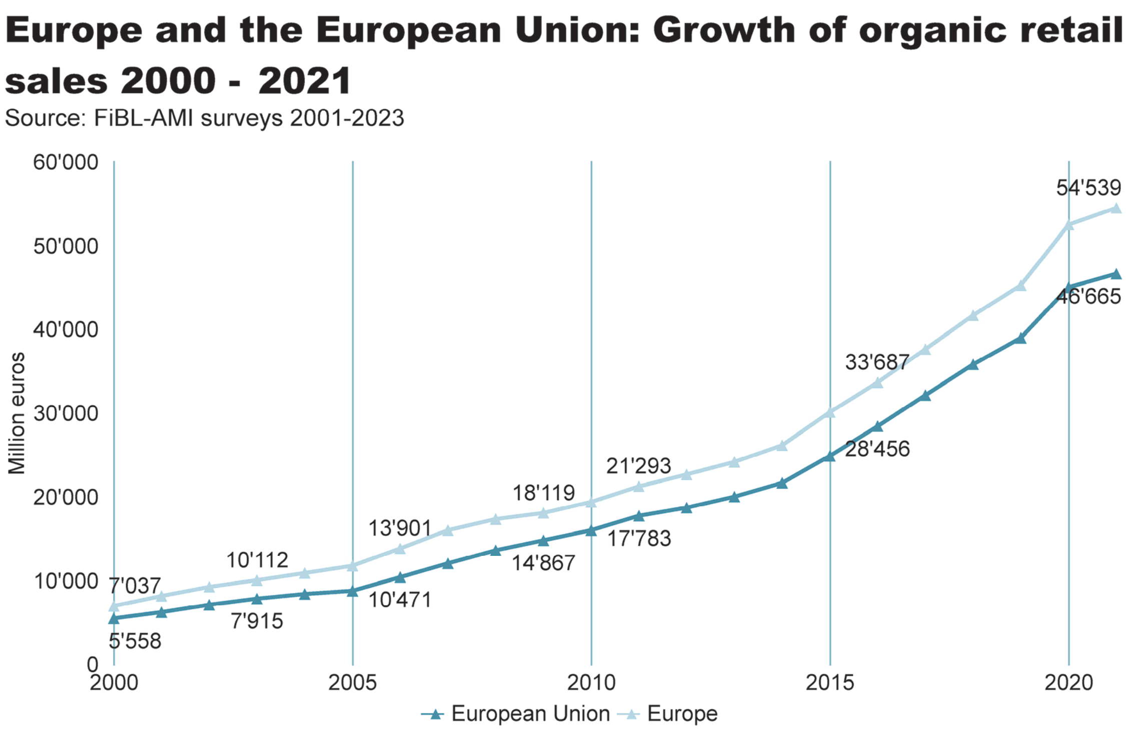


Figure 91: Europe: Growth of the per capita consumption 2010-2021

Source: FiBL-AMI survey 2023 based on national data sources. Calculation based on Eurostat population data. For detailed data sources, see annex.

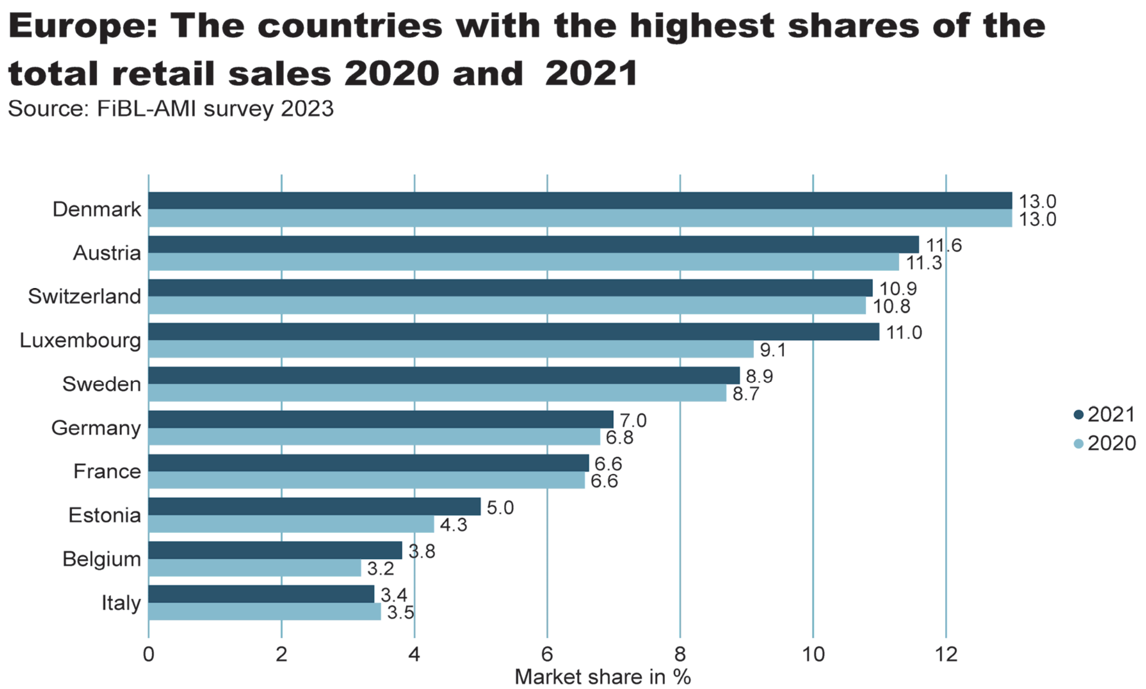


Figure 92: Europe: The countries with the highest shares of the total retail sales 2020 and 2021

Source: FiBL-AMI survey 2023 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 72 shows that, in Denmark and France, eggs reach organic market shares of more than 30 percent (in value). On the other hand, they are the first organic product with a saturated market resulting in oversupply as observed in Germany.

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. Individual products can reach even higher market shares. For example, fresh carrots have a market share of more than 30 percent in Germany and of almost 60 percent in Denmark. In Sweden and Switzerland, organic dairy products are reaching organic market shares of 10 percent or higher. 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.

Table 72: Organic shares for retail sales values (euros) for selected products 2021

	Austria	Belgium	Czech Republic (2020)	Denmark (2021)	Finland	France (2019)	Germany	Italy (2019)	Netherlands	Spain (2017)	Sweden	Switzerland	UK (2020)
Baby food					24.0	26.9		4.8			25.9		59.6
Beverages			0.5	18.7 (juice)		5.5		3.0				4.5	
Bread & bakery products		5.1 (bread)	0.9			5.3	7.7 (bread)	4.0	0.9		0.9	26.3 (bread only)	0.3
Eggs	23.9	21.8		47.4	20.0	37.2	25.7	19.8	17.0	2.9	22.2	29.2	8.8
Fish and fish products						3.1			1.4	0.6			1.1
Fresh vegetables	20.5	8.8			5.0	7.6	13.7	4.7		3.3		23.8	4.8
Fruit	14.2	6.9				8.8	10.1	6.6		1.7		19.4	3.0
Vegetables and fruit			1.6		7.0	8.2		7.7	4..5			21.6	0.5
Meat and meat products	6.2 (meat)		0.4	13.6 (beef)		3.2	5.9 (meat)	2.9	3.3	1.2	2.9	6.2 (incl. fish)	1.6
Milk and dairy products	14.1	4.1	1.6			5.8		3.6	4.0	1.1		11.4	3.5
- Butter	12.1			25.0		7.4	7.5	2.8					
- Cheese	11.1			11.3	2.0	2.6	6.1	1.0			1.9	8.4	1.1
- Milk	30.2	4.1		44.6	4.0	15.7	17.1	8.1			14.1	26.8	5.1
- Yoghurt	26.3.3					9.1	10.4	6.1					8.2

Sources: FiBL-AMI survey 2023, based on data from Austria: RollAMA based on GfK, Belgium: Biowallonie; Czech Republic: UZEI; Denmark: Organic Denmark based on Kauzas Houshold panels, provided by Danish Agriculture & Food Council (please note that the data source has changed and a direct year-to-year comparison is not possible), 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: Sweden: Ekologiska Lantbrukarna, Ekomatcentrum and Organic Sweden; 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.

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 78).

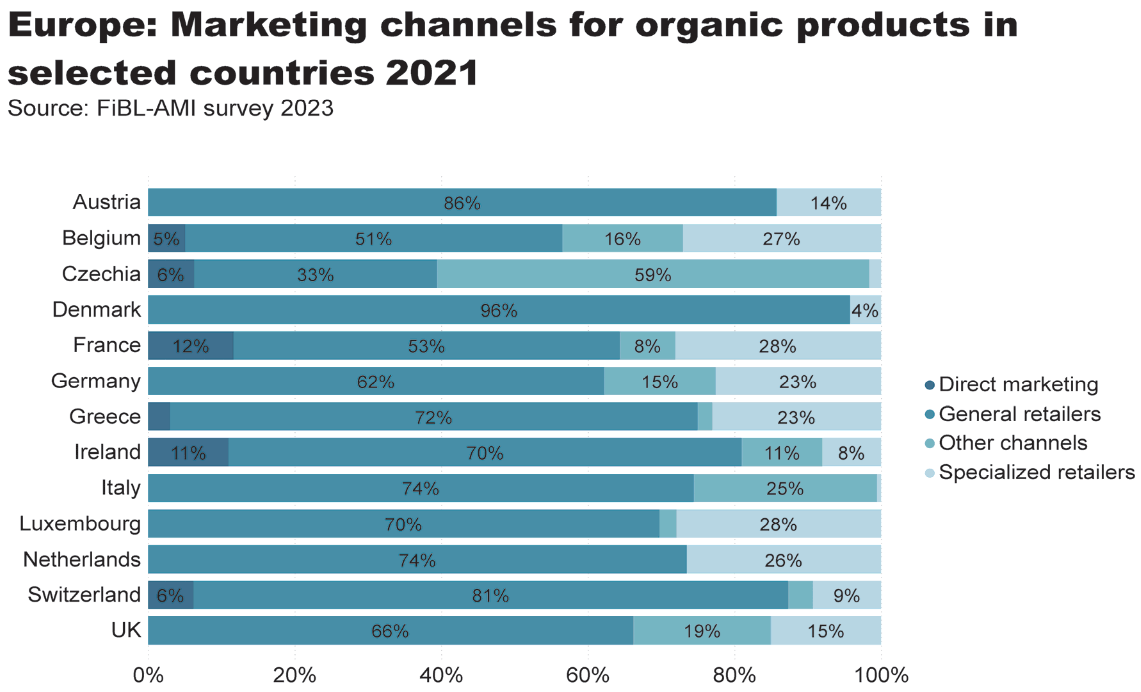


Figure 93: Europe: Marketing channels for organic products in selected countries 2021

Source: FiBL-AMI survey 2023 based on national data sources.
For detailed data sources, see annex.

Figure 93 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 94.

In all countries displayed in Figure 94, strongest growth in the 2017-2021 period was noted for the general retailers. In Germany for instance, 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 22.6 percent in 2021. Supermarket chains have founded partnerships with organic associations and sell products with their brands.

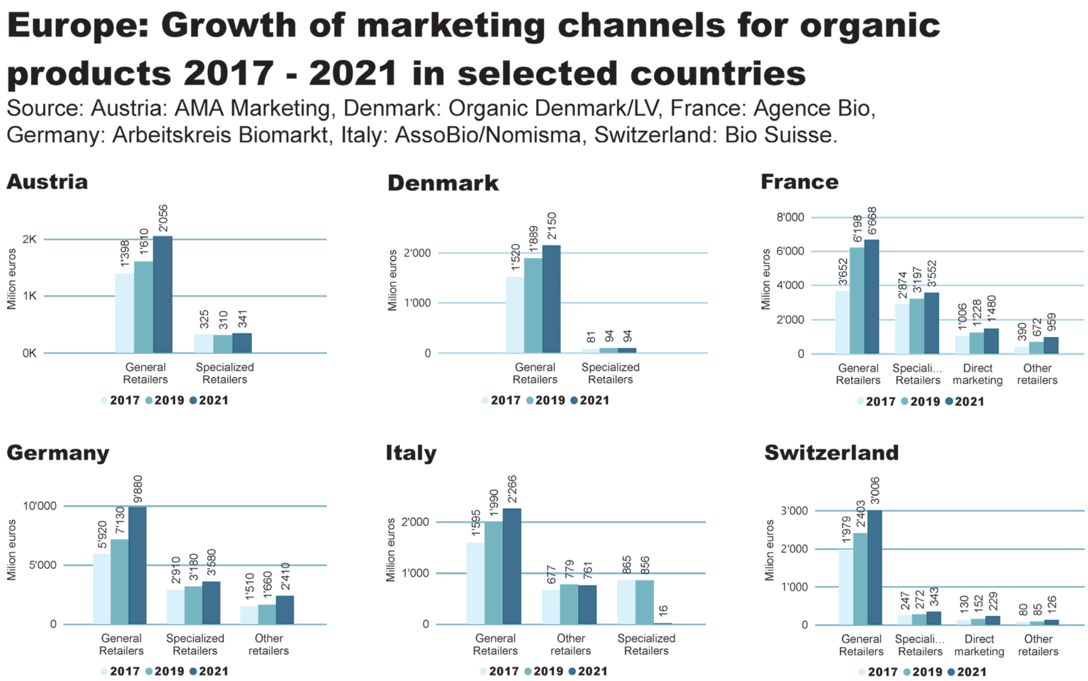


Figure 94: Europe: Growth of marketing channels for organic products 2017-2021 in selected countries

Sources: Austria: AMA Marketing, Denmark: Danish Agriculture & Food Council, France: Agence Bio, Germany: Arbeitskreis Biomarkt/AMI, Italy: Nomisma, Switzerland: Bio Suisse.

6.7 The European organic market: Effects of the pandemic and the war in Ukraine

Effects of the pandemic

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 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 during the pandemic.

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.”

Post pandemic developments

The pandemic continued to boost organic markets in many European countries in 2021, but not to the same extent as in the first Corona year of 2020, when the market grew by 15 percent. The level reached in 2020 was maintained (3.8 percent growth in Europe).

In addition, normal life returned in many countries in the second half of the year. People cooked less at home and travelled more.

- Estonia achieved the biggest growth in 2021 with a 21 percent increase as the range of products offered in stores was significantly expanded. Luxembourg also achieved double-digit growth of 15 percent.
- Many countries, such as Belgium, Austria, Germany, Switzerland and the United Kingdom, achieved growth rates of around 4 to 6 percent.
- Some countries showed stable to slightly negative developments: Denmark, France, Finland, Italy and the Netherlands.
- In Sweden, the market shrank for the second year in a row, this time by 5 percent.

The war in Ukraine and its impact on the organic market

After two successful years, organic market growth in Europe turned around in 2022 with the start of the war in Ukraine. The cost of living has skyrocketed in many countries, with inflation reaching unprecedented levels of 10 percent and more in the second half of the year. Thus, people are keeping their money together and saving where it is easiest: food. People are buying smaller, more targeted quantities and throwing less away. People's awareness of organic, environmental and health issues remains. However, due to decreasing incomes and increasing prices for many consumer goods, such as energy, some population groups have reduced their spending on organic products.

Nevertheless, buying organic remains a relevant topic; however, people are trying to get organic products cheaper. In Germany, for example, this is reflected in the continued double-digit growth rates for organic products in discounters, despite the fact that the biggest price increases were recorded there. Increasing prices for both producers and consumers is a big issue and impacts market structures. Many processing companies are struggling, and others have even gone bankrupt. Therefore, 2023 will be a challenging year for the organic sector. To reach the EU Farm to Fork target of 25 percent organic farmland in Europe by 2030, appropriate and timely support measures are needed.

Acknowledgements

Part of this work was done under the OrganicTargets4EU project, which is funded by the European Union (Grant no. 101060368) and by the Swiss State Secretariat for Education, Research and Innovation (SERI) (Grant no. 22.00155). Views and opinions expressed are however those of the authors only and do not necessarily reflect those of the European Union, European Research Executive Agency (REA) or Swiss State Secretariat for Education, Research and Innovation (SERI). Neither the European Union nor any other granting authority can be held responsible for them.
Furthermore, the data collection builds on that of the OrganicDataNetwork ("Data network for better European organic market information") project, which was funded by the European Union (EU) under its seventh framework programme for research, demonstration, and technological development (Grant agreement no 289376).
The authors would like to thank all of those who have provided data and information for this report.

References and further reading

European Commission (2021): E1 imports of organic agri-food products. Key developments in 2021. EU Agricultural Market Briefs, No 19, September 2022

Eurostat (2022): Data tables organic agriculture. The Eurostat website eurostat.ec.europa.eu Eurostat, Luxembourg. Available at http://ec.europa.eu/eurostat/data/database

Meredith, S. and Willer, H. (Eds.) (2016): Organic in Europe 2016. IFOAM EU, Brussels

Willer, H. and Schaack, D. (2014) Final report on the compilation of key organic market data. Research Institute of Organic Agriculture (FiBL), Frick, Switzerland.

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.

Table 73: Europe: Organic agricultural land by country 2021

Please note that not for all countries 2021 data were available.

Country	Organic agr. land [ha]	Organic share [%]	Change 2020-2021 [%]	Change 2012-2021 [%]	Change 2020-2021 [ha]
Albania	1'094	0.1%	23.4%	95.3%	207
Andorra	2	0.0%	5.5%		0
Austria	679'119	26.5%	-0.1%	20.9%	-753
Belarus	6'725	0.1%	-1.6%		-113
Belgium	101'828	7.4%	2.8%	70.5%	2'753
Bosnia & Herzegovina	2'495	0.1%	47.5%	627.8%	803
Bulgaria	86'310	1.7%	-25.8%	120.5%	-29'943
Channel Islands	180	2.0%		-30.8%	
Croatia	121'924	8.1%	12.3%	282.2%	13'314
Cyprus	7'738	5.7%	30.8%	97.2%	1'820
Czech Republic	558'124	15.8%	3.4%	19.1%	18'592
Denmark	299'998	11.4%	0.0%	71.3%	0
Estonia	226'605	23.0%	2.6%	57.2%	5'809
Faroe Islands	251	8.4%	0.0%	-0.8%	0
Finland	327'736	14.4%	4.0%	65.7%	12'624
France	2'776'554	9.6%	8.9%	168.8%	227'877
Germany	1'802'231	10.8%	5.9%	74.2%	99'991
Greece	534'629	10.1%		15.6%	
Hungary	293'597	5.9%	-2.6%	124.8%	-7'833
Iceland	6'440	0.4%	36.7%	-21.8%	1'731
Ireland	86'868	1.9%	16.3%	64.5%	12'202
Italy	2'186'159	16.7%	4.3%	87.3%	90'795
Kosovo	1'990	0.5%	24.1%	1692.8%	386
Latvia	291'150	14.8%	0.0%	48.8%	0
Liechtenstein	1'423	40.2%	-4.5%	31.0%	-67
Lithuania	261'782	8.9%	11.2%	67.2%	26'311
Luxembourg	6'893	5.2%	12.7%	66.9%	775
Malta	66	0.6%	-2.1%	77.2%	-1
Moldova	28'368	1.3%	2.7%	28.4%	744
Montenegro	4'404	1.7%	-8.7%	43.5%	-419
Netherlands	76'375	4.2%	6.7%	59.0%	4'768
North Macedonia	7'794	0.6%	109.1%	-38.8%	4'067
Norway	45'112	4.6%	-0.2%	-18.4%	-69
Poland	509'286	3.5%		-23.1%	
Portugal	308'289	7.8%	-3.5%	54.0%	-11'251
Romania	578'718	4.3%	23.4%	100.8%	109'831
Russian Federation	655'457	0.3%	6.5%	348.2%	40'269
Serbia	23'527	0.7%	21.8%	271.1%	4'210
Slovakia	222'896	11.7%		33.7%	
Slovenia	52'078	10.8%		48.4%	
Spain	2'635'442	10.8%	8.1%	65.4%	197'551
Sweden	606'669	20.2%	-0.6%	27.0%	-3'874
Switzerland	181'444	17.4%	2.3%	49.0%	4'098
Türkiye	327'583	0.9%	-14.4%	-37.4%	-55'056
Ukraine	422'299	1.0%	-8.6%	54.8%	-39'926
United Kingdom	489'200	2.8%	3.3%	-17.1%	15'700
Total Europe	**14'868'780**	**9.2%**	**5.3%**	**68.3%**	**748'149**
Total EU	**15'639'063**	**9.6%**	**5.2%**	**66.5%**	**771'358**

Source*: FiBL-AMI survey 2023 based on Eurostat and national data sources. For data sources, see annex*

Table 74: Europe: Conversion status of organic agricultural land 2021

Please note that not for all countries and for all indicators 2021 data were available.

County	Organic area [ha]	Area fully converted [ha]	Area under conversion [ha]
Albania	1'094	912	183
Andorra	2	2	
Austria	679'119		
Belarus	6'725	2'443	4'282
Belgium	101'830	85'527	13'547
Bosnia and Herzegovina	2'495	2'082	413
Bulgaria	86'310	70'424	15'887
Channel Islands	180	180	
Croatia	121'924	89'770	32'154
Cyprus	7'738	5'420	2'318
Czech Republic	558'124	522'619	35'504
Denmark	299'998	243'674	56'328
Estonia	226'605	209'472	17'132
Faroe Islands	251	251	
Finland	327'737	290'192	37'643
France	2'776'554	2'192'182	584'617
Germany	1'802'231		
Greece	534'629	451'079	83'554
Hungary	293'597	262'906	30'691
Iceland	6'440	4'502	1'938
Ireland	86'868	70'360	16'507
Isle of Man			
Italy	2'186'159	1'784'480	401'679
Kosovo	1'990	1'987	3
Latvia	291'150	264'860	26'291
Liechtenstein	1'423	1'423	
Lithuania	261'782	208'266	53'516
Luxembourg	6'893	5'670	1'223
Malta	66	44	21
Moldova	28'368	22'242	6'124
Montenegro	4'404	4'160	244
Netherlands	76'375	71'281	5'093
North Macedonia	7'794	5'912	1'882
Norway	45'112	42'017	3'095
Poland	509'286	400'855	108'442
Portugal	308'289	257'121	51'168
Romania	578'718	344'541	234'177
Russian Federation	655'457	94'489	7'404
San Marino			
Serbia	23'528	13'225	10'303
Slovakia	222'896	181'740	41'153
Slovenia	52'078	45'788	6'292
Spain	2'635'442	1'956'836	218'732
Sweden	606'669	570'207	36'462
Switzerland	181'444		
Türkiye	327'583	219'445	108'138
Ukraine	422'299	370'110	52'189
United Kingdom	489'200	448'600	40'600
Europe	**17'844'856**	**11'819'294**	**2'346'930**
European Union	**15'639'066**	**10'585'313**	**2'110'132**

Source: *FiBL-AMI survey 2023 based on Eurostat and national data sources. For data sources, see annex.*

Table 75: Europe: Land use in organic agriculture by country 2021

Please note that not for all countries 2021 data were available.

Country	Arable land [ha]	Permanent grassland [ha]	Permanent crops [ha]	Total [ha]
Albania	759		128	887
Andorra			2	2
Austria	275'403	392'168	12'301	679'872
Belarus	1'298		66	6'838
Belgium	35'922	61'644	1'507	99'073
Bosnia and Herzegovina	1'532		159	1'692
Bulgaria	61'249	30'154	24'849	116'252
Channel Islands				180
Croatia	50'203	42'332	16'077	108'610
Cyprus	2'916	186	2'816	5'918
Czech Republic	91'436	442'399	5'696	539'532
Denmark	248'473	47'949	3'576	299'998
Estonia	124'378	93'896	2'522	220'796
Faroe Islands	1	250		251
Finland	266'668		625	315'112
France	1'445'221	879'244	193'731	2'548'677
Germany	735'727	880'000	25'132	1'702'240
Greece	172'441	294'012	68'176	534'629
Hungary	105'562	180'961	14'907	301'430
Iceland	543	2'356	1	4'709
Ireland	8'103	66'488	75	74'666
Isle of Man				
Italy	1'016'287	583'781	495'296	2'095'364
Kosovo	1'593		11	1'604
Latvia	155'204	132'635	3'311	291'150
Liechtenstein	228	1'144	7	1'490
Lithuania	142'344	82'143	4'753	235'471
Luxembourg	2'858	3'130	130	6'118
Malta	41		26	67
Moldova	23'223		4'305	27'624
Montenegro	307	3'952	564	4'823
Netherlands	29'165	41'541	901	71'607
North Macedonia	2'955		772	3'727
Norway	36'337	8'501	343	45'181
Poland	375'930	85'741	47'615	509'286
Portugal	57'381	196'502	65'657	319'540
Romania	291'628	155'038	22'221	468'887
Russian Federation	585'148	2'489		615'067
Serbia	10'200	3'517	5'600	19'317
Slovakia	75'589	145'209	2'095	222'896
Slovenia	6'893	41'903	3'280	52'078
Spain	502'074	1'273'392	662'425	2'437'891
Sweden	471'460	138'398	686	610'544
Switzerland	42'951	128'550	3'107	177'347
Türkiye	165'058	12'545	205'036	382'639
Ukraine	345'375	1'375	3'855	462'225
United Kingdom	159'000	304'500	2'000	473'500
Total Europe	**8'127'064**	**6'760'026**	**1'906'341**	**17'096'807**
Total EU	**6'750'556**	**6'290'847**	**1'680'385**	**14'867'704**

Source: FiBL-AMI survey 2023 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 76: Europe: Organic agricultural land and wild collection areas by country 2021

Please note that not for all countries 2021 data were available.

Country	Agricultural land [ha]	Wild collection [ha]	Total [ha]
Albania	1’094	475’136	476’230
Andorra	2		2
Austria	679’119		679’119
Belarus	6’725		6’725
Belgium	101’830		101’830
Bosnia and Herzegovina	2’495	195’668	198’163
Bulgaria	86’310		86’310
Channel Islands	180		180
Croatia	121’924		121’924
Cyprus	7’738		7’738
Czech Republic	558’124		558’124
Denmark	299’998		299’998
Estonia	226’605	445’512	672’117
Faroe Islands	251		251
Finland	327’737	6’928’693	7’256’430
France	2’776’554		2’776’554
Germany	1’802’231		1’802’231
Greece	534’629		534’629
Hungary	293’597		293’597
Iceland	6’440	454’382	460’822
Ireland	86’868		86’868
Isle of Man			
Italy	2’186’159		2’186’159
Kosovo	1’990	373’488	375’478
Latvia	291’150		291’150
Liechtenstein	1’423		1’423
Lithuania	261’782		261’782
Luxembourg	6’893		6’893
Malta	66		66
Moldova	28’368	1’351	29’719
Montenegro	4’404		4’404
Netherlands	76’375		76’375
North Macedonia	7’794	556’600	564’394
Norway	45’112		45’112
Poland	509’286		509’286
Portugal	308’289		308’289
Romania	578’718		578’718
Russian Federation	655’457	801’704	1’457’162
Serbia	23’528		23’528
Slovakia	222’896		222’896
Slovenia	52’078		52’078
Spain	2’635’442		2’635’442
Sweden	606’669		606’669
Switzerland	181’444		181’444
Türkiye	327’583	24’334	351’917
Ukraine	422’299	328’596	750’895
United Kingdom	489’200		489’200
Europe	**17’844’856**	**10’585’464**	**28’430’320**
European Union	**15’639’066**	**7’374’205**	**23’013’271**

Source: FiBL-AMI survey 2023 based on Eurostat and national data sources. For data sources, see annex.

Table 77: Europe: Organic producers, processors, and importers by country 2021

Please note that not for all countries 2021 data were available.

Country	Producers	Processors	Importers	Exporters
Albania	130	62		26
Andorra		3		
Austria	23'961	1'691	58	4
Belarus	19	20		11
Belgium	2'590	1'585	304	153
Bosnia and Herzegovina	90	51		20
Bulgaria	5'942	249	22	2
Croatia	6'024	378	12	
Cyprus	1'292	70	28	0
Czech Republic	4'797	930	359	163
Denmark	4'186	1'162	101	104
Estonia	2'043	195	47	24
Faroe Islands	1	1		
Finland	5'007	414	56	37
France	58'413	19'311	662	
Germany	36'307	19'572	2'016	
Greece	29'869	1'653	45	40
Hungary	5'129	489	61	0
Iceland	30	20	8	3
Ireland	1'914	215	156	58
Italy	75'874	23'802	579	1'036
Kosovo	56	19		
Latvia	4'171	65	5	0
Liechtenstein	47			
Lithuania	2'529	121	1	
Luxembourg	123	107	8	0
Malta	25	16	54	0
Moldova	151	21	3	40
Monaco		2		
Montenegro	422	25		0
Netherlands	1'985	995	533	146
North Macedonia	887	17	8	1
Norway	1'778	471	103	0
Poland	18'598	668	267	319
Portugal	13'263	1'296	66	31
Romania	11'562	209	34	25
Russian Federation	66	19		
Serbia	458	152	74	82
Slovakia	716	119	43	5
Slovenia	3'685	139	28	0
Spain	52'861	5'921	472	230
Sweden	5'360	1'128	361	27
Switzerland	7'670	1'427	520	15
Türkiye	48'244	227	280	516
Ukraine	418	73		
United Kingdom	3'581	2'566	216	
Europe	**442'274**	**87'676**	**7'590**	**3'118**
European Union	**378'226**	**82'500**	**6'378**	**2'404**

Source: FiBL-AMI survey 2023 based on Eurostat and national data sources. For data sources, see annex.
**Total number includes data for countries with less than three operators.*

Table 78: Europe and European Union: Organic retail sales 2021*

Country	Data year**	Retail sales [Million €]	€/person [€]	Organic share [%]	1 year growth [%]	Food-service [Million €]
Austria	2021	2'397.0	268.3	11.6	5.8	128.0
Belgium	2021	978.2	121.5	3.8	4.6	
Bosnia and Herzegovina	2017	0.4	0.1			
Bulgaria	2021	33.0	4.8	1.0	2.5	
Croatia	2018	99.3	24.2	2.2		
Czech Republic	2020	226.0	21.9	1.8		7.6
Denmark	2021	2'240.0	383.6	13.0	0.0	284.0
Estonia	2017					9.9
	2021	92.6	69.6	5.0	21.0	
Finland	2021	407.0	73.5	2.5	-0.5	
France	2021	12'659.0	187.1	6.6	-0.3	609.0
Germany	2021	15'870.0	190.8	7.0	5.8	
Greece	2021	66.0	6.2	0.3		
Hungary	2015	30.0	3.0	0.3		
Ireland	2020	235.0	47.3	2.7		
	2021				2.7	
Italy	2021	3'943.0	66.6	3.4	-0.8	1'074.0
Latvia	2017	51.0	6.3	1.5		
Liechtenstein	2021	8.8	229.8			
Lithuania	2017	50.5	17.8	1.0		5.0
Luxembourg	2021	197.1	313.0	11.0	15.3	6.0
Netherlands	2019					330.3
	2021	1'374.0	78.6	3.3	0.9	
Norway	2016			1.7		
	2019	441.8	82.9			29.9
Poland	2021	314.1	8.3	0.6		
Portugal	2011	21.0	2.0	0.2		
Romania	2016	40.7	2.1	0.2		
Russian Federation	2018	183.0	1.3			
Slovenia	2009					0.1
	2013	48.6	26.6	1.8		
Spain	2019					54.4
	2020	2'528.0	53.4	2.5		
Sweden	2021	2'764.0	266.3	8.9	-5.4	607.0
Switzerland	2021	3'704.6	424.6	10.9	3.9	
Türkiye	2014	46.2	0.6			
Ukraine	2021	27.9	0.6			
United Kingdom	2020			1.8		
	2021	3'461.3	51.6		5.2	91.0
Europe		**54'539.0**	**65.7**		**+3.8%**	
European Union		**46'665.0**	**104.3**	**4.7%**	**+3.6%**	

Source: FiBL-AMI survey 2023 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 data are shown.
- Values published in national currencies were converted to euros using the 2021 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.

Table 79: Europe: International Trade 2021

Country	EU imports [MT]*	Exports to EU and USA combined [MT]**	Exports [Million €]***	Imports [Million €]***
Albania		1'969.9		
Austria	35'345.1	415.3		
Belarus		2'459.1		
Belgium	276'832.7			
Bosnia and Herzegovina		2'788.1	6.3	
Bulgaria	18'870.1	15.5		
Croatia	964.3	27.2	2.9	34.8
Cyprus	225.7			
Czech Republic	30'066.9		133.8	115.7
Denmark	61'737.5	0.1	439.3	678.8
Estonia	292.4	5'182.0	27.0	
Finland	16'036.7		27.5	
France	271'608.3	1'873.6	887.0	2'830.0
Germany	517'182.7	244.7		
Greece	13'061.1	1'846.1		
Hungary	1'168.7		20.0	18.0
Ireland	83'517.1	15.8		
Italy	224'956.4	27'450.0	2'900.0	
Kosovo		560.6	6.0	
Latvia	414.6		51.0	
Lithuania	34'800.4	2.5	45.0	
Luxembourg	44.4			
Malta	51.4			
Moldova		19'376.4		
Montenegro		16.5		
Netherlands	945'125.0	668.6	1'200.0	
North Macedonia		662.1		
Poland	37'382.3	1.6		
Portugal	6'810.3	3'227.6		
Romania	9'939.1	9.0	200.0	35.0
Russian Federation		61'865.0		
Serbia		19'467.8	18.9	3.7
Slovakia	407.4			
Slovenia	9'356.8		0.1	23.0
Spain	93'337.6	10'081.9	1'165.0	1'014.0
Sweden	183'413.0	44.7	117.0	
Switzerland		32.3		
Türkiye		170'755.4		
Ukraine		239'567.9	187.7	4.0
United Kingdom		108'307.0	193.9	
Europe	***2'872'947.7***	***679'010.3***	***7'628.3***	***4'756.9***
European Union	***2'872'947.7***	***51'182.3***	***7'215.5***	***4'749.2***

Source: European Commission/TRACES, USDA/GATS, FiBL survey based on national data sources

- *Imports in metric tons (MT) to the European Union based on Traces/European Commission data
- ** Exports to the European Union (from European non-EU countries only, based on TRACES/European Commission) and to the US (based on GATS/USDA; all European countries). Please note that the US import data do not cover all products.
- *** Export and import values (to and from ALL countries) are based on national data sources.

Table 80: European Union: EU organic imports by EU Member State 2021 (EU 27)

Country	2018 [MT]	2019 [MT]	2020 [MT]	2021 [MT]
Country	2018	2019	2020	2021
Austria	35'920.9	28'379.1	30'766.2	35'345.1
Belgium	177'959.5	371'911.6	303'002.3	276'832.7
Bulgaria	12'280.6	14'847.1	15'330.7	18'870.1
Croatia	3'559.3	1'059.0	540.4	964.3
Cyprus	211.2	251.6	139.9	225.7
Czech Republic	29'492.6	19'956.0	25'020.6	30'066.9
Denmark	127'413.1	120'704.8	82'116.4	61'737.5
Estonia	474.8	326.1	313.0	292.4
European Union undefined	197'612.1			
Finland	14'987.7	18'921.3	18'421.1	16'036.7
France	213'625.3	240'582.4	274'620.0	271'608.3
Germany	427'615.9	432'897.1	491'718.5	517'182.7
Greece	6'368.0	8'269.8	10'180.1	13'061.1
Hungary	2'061.7	991.8	991.5	1'168.7
Ireland	19'476.4	4'099.4	61'778.5	83'517.1
Italy	185'803.0	180'388.1	236'106.3	224'956.4
Latvia	52.4	3'359.4	520.0	414.6
Lithuania	2'797.5	8'346.2	33'144.3	34'800.4
Luxembourg	487.8	47.2	65.1	44.4
Malta	1.0	8.8	60.0	51.4
Netherlands	953'037.8	1'037'553.5	857'360.6	945'125.0
Poland	19'330.4	29'285.3	36'077.2	37'382.3
Portugal	7'238.9	4'305.1	7'070.4	6'810.3
Romania	8'816.7	9'025.7	10'888.7	9'939.1
Slovakia	455.0	617.0	251.6	407.4
Slovenia	17'460.9	22'418.9	6'458.3	9'356.8
Spain	78'818.2	100'140.1	112'183.6	93'337.6
Sweden	167'269.1	190'023.2	178'977.7	183'413.0
Total	**2'710'628.0**	**2'848'715.5**	**2'794'103.1**	**2'872'947.7**

Source: TRACES/European Commission