

The European market for organic food

BIOFACH Congress, February 13, 2024, 5 to 6 PM



- Facilitator: Dr. Susanne Padel, Germany
- Jan Trávníček, Research Institute of Organic Agriculture/Czech Organics: European Market
- Diana Schaack, Agricultural Market Information Company AMI: The German market
- Sarah Le Douarin, Agence Bio, The French Organic Market
- Lee Holdstock, Soil Association, The UK Organic Market
- Professor Dr. Raffaele Zanolì, Polytechnic University of the Marche: The Italian organic market



Research Institute of Organic Agriculture FiBL
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The European Market for Organic Food 2022

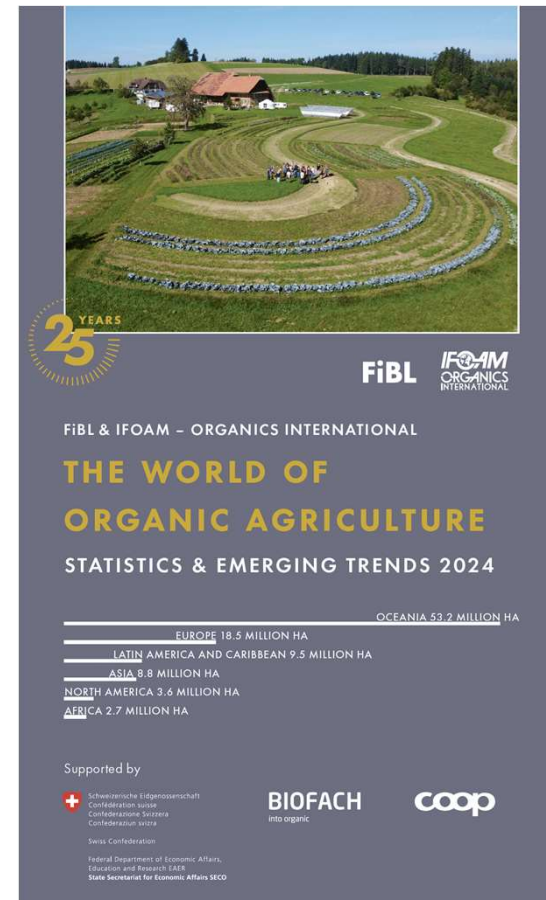
Jan Trávníček and Bernhard Schlatter and Helga Willer, FiBL

February 13, 2024 – BIOFACH Congress, Nürnberg



The World of Organic Agriculture 2024

- › The 25th edition of «The World of Organic Agriculture», was published by FiBL and IFOAM – Organics International in February 2024.
- › Data tables
- › Country and continent reports
- › Markets, standards, policy support
- › The book can be ordered or downloaded at (item number 1747): <https://www.fibl.org/en/shop-en>
- › www.organic-world.net
- › <https://statistics.fibl.org>



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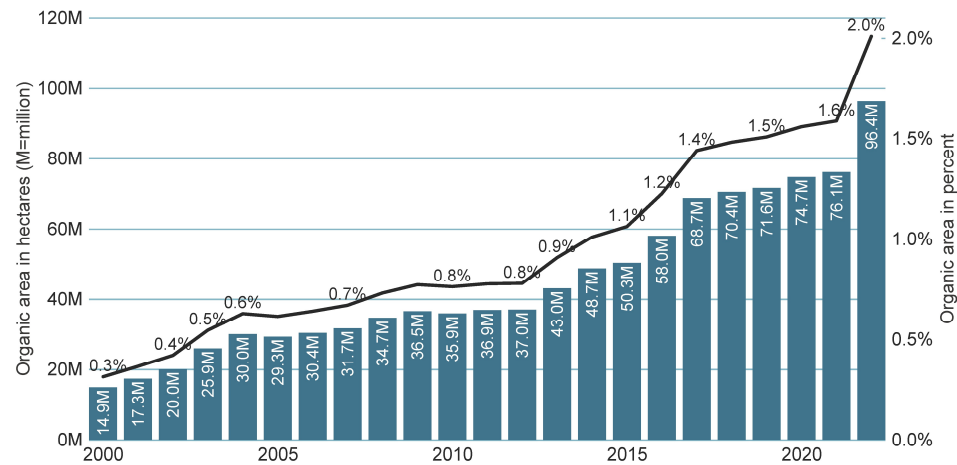
Global Trends

- Organic farmland increased strongly
- Organic producers increased strongly
- Organic imports (EU and US): Decrease in the EU, increase in the US
- Market development: slight decrease in Europe, a modest increase in other parts of the world
- Organic food service: Increase in Europe

Global highlights: Record growth of organic farmland and producers in 2022

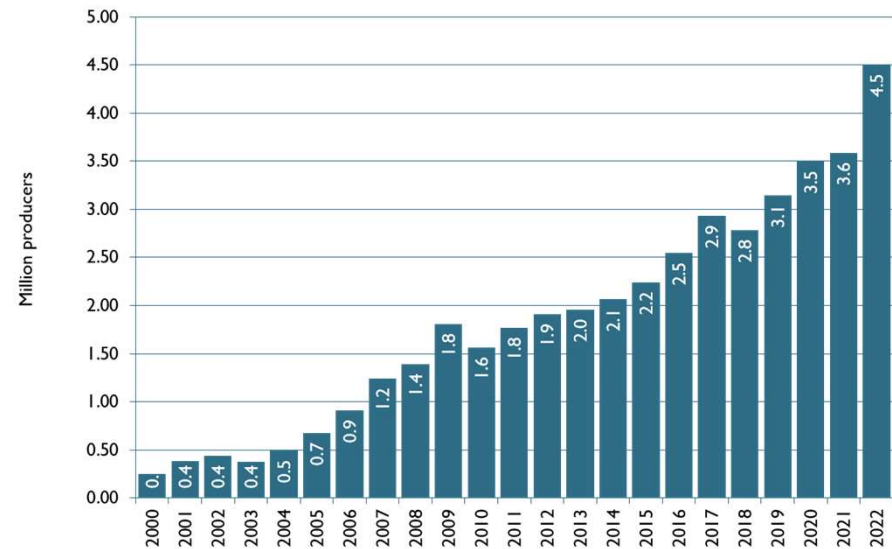
World: Growth of organic agricultural land and organic share 2000 - 2022

Source: FiBL-IFOAM-SOEL surveys 2001-2024



Growth of organic producers 2000-2022

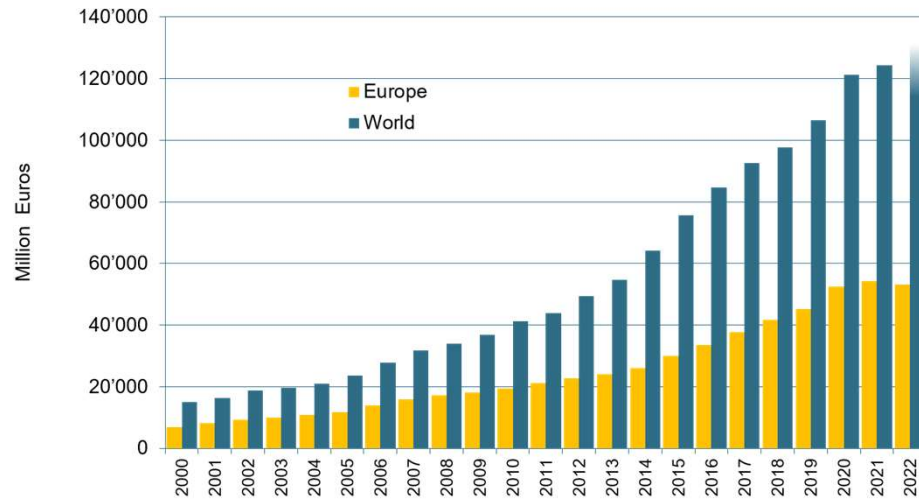
Source: FiBL survey 2024



Global highlights: Mixed developments for retail sales and international trade

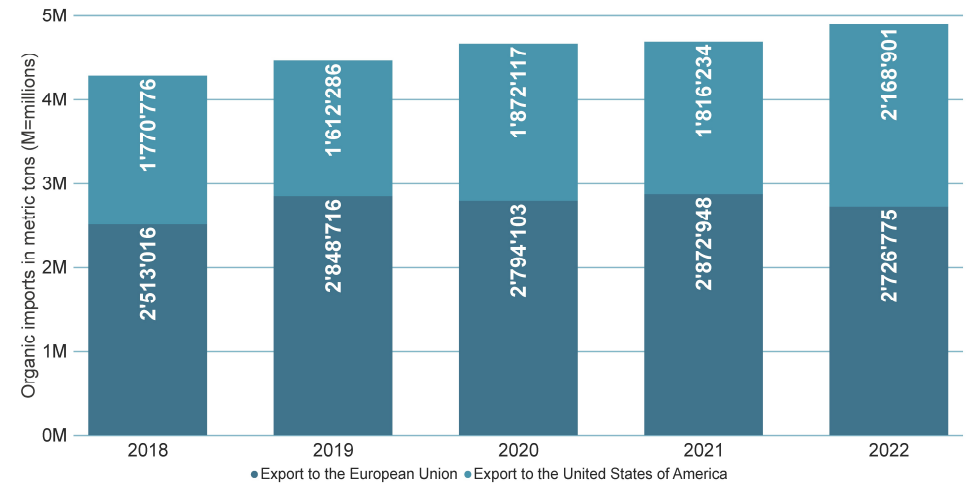
European and global retail sales growth 2000-2022

Source: FiBL surveys 2004-2024



Imports: Organic agri-food imports development to the EU and the US 2018 - 2022

Sources: Traces/European Commission and USDA

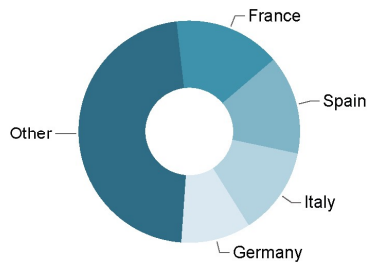


Organic farmland development in Europe

EUROPE: ORGANIC FARMLAND 2022



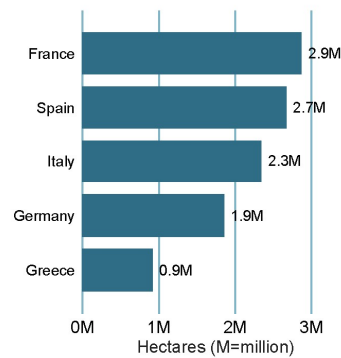
Four countries hold more than half of Europe's organic agricultural area.



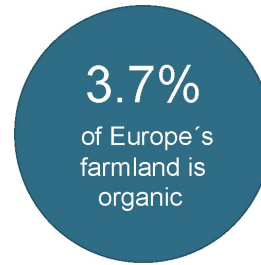
Distribution of organic agricultural land by country 2022



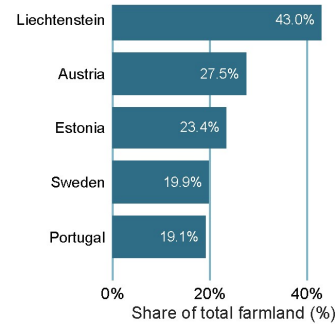
The countries with the largest organic agricultural area were France, Spain and Italy.



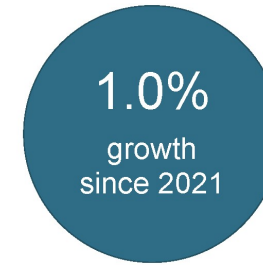
The 5 countries with the largest areas of organic agricultural land 2022



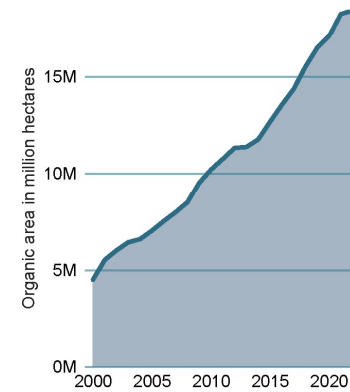
15 countries had 10% or more of their agricultural land under organic management.



Top 5 countries with an organic share of more than 10% of total agricultural land 2022



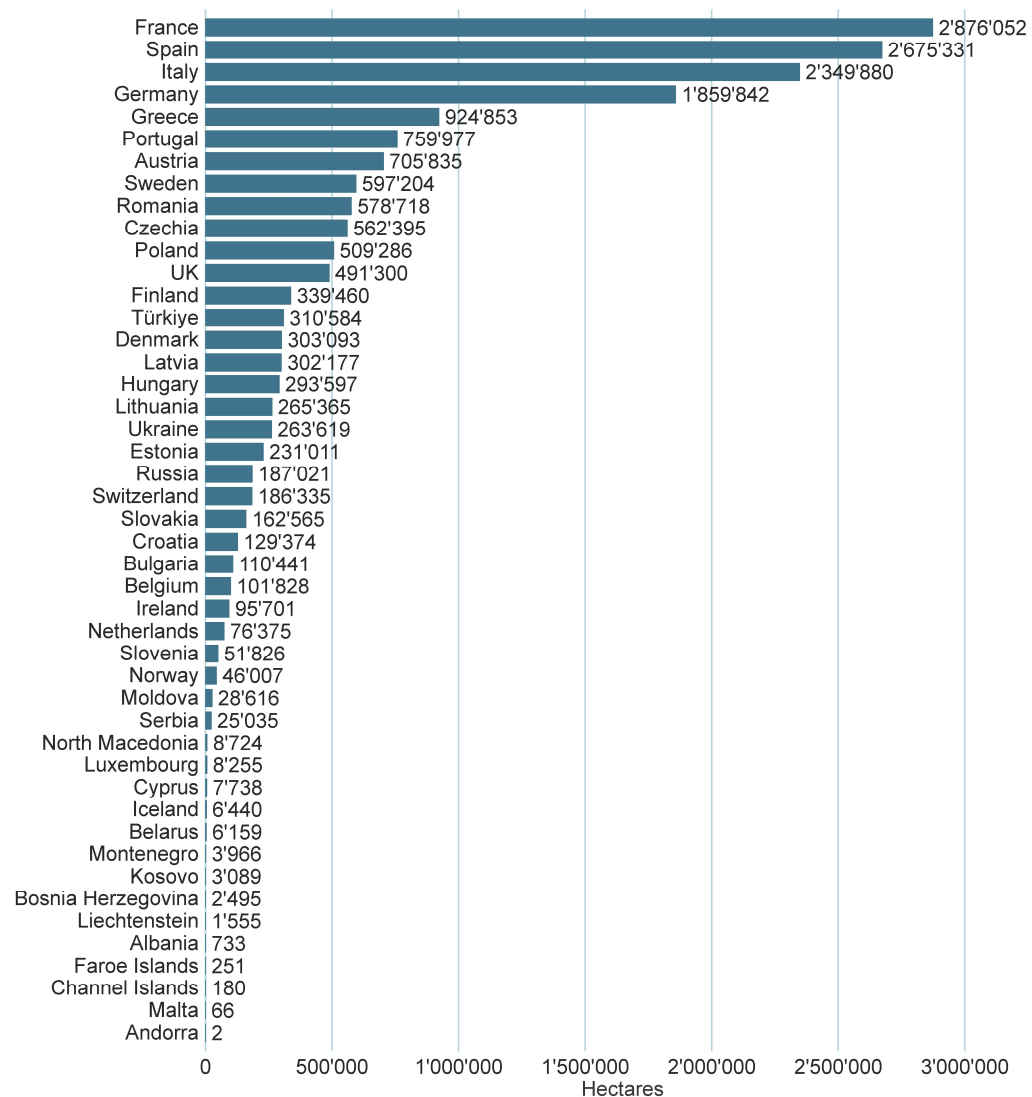
In 2022, about 190'000 hectares more were reported compared with 2021.



Growth of the organic agricultural land 2000-2022

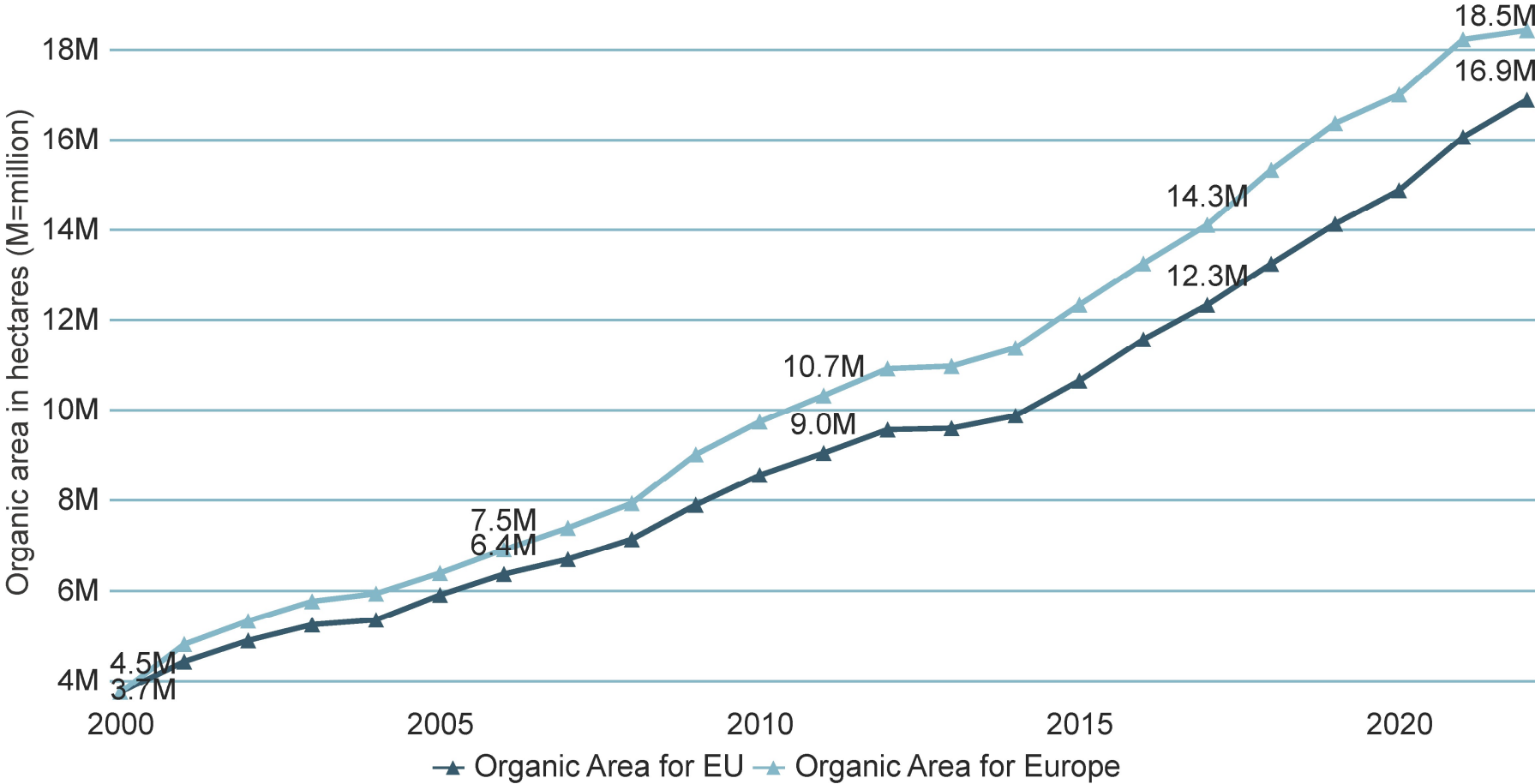
Europe: Organic agricultural land by country 2022

Source: FiBL-AMI survey 2024



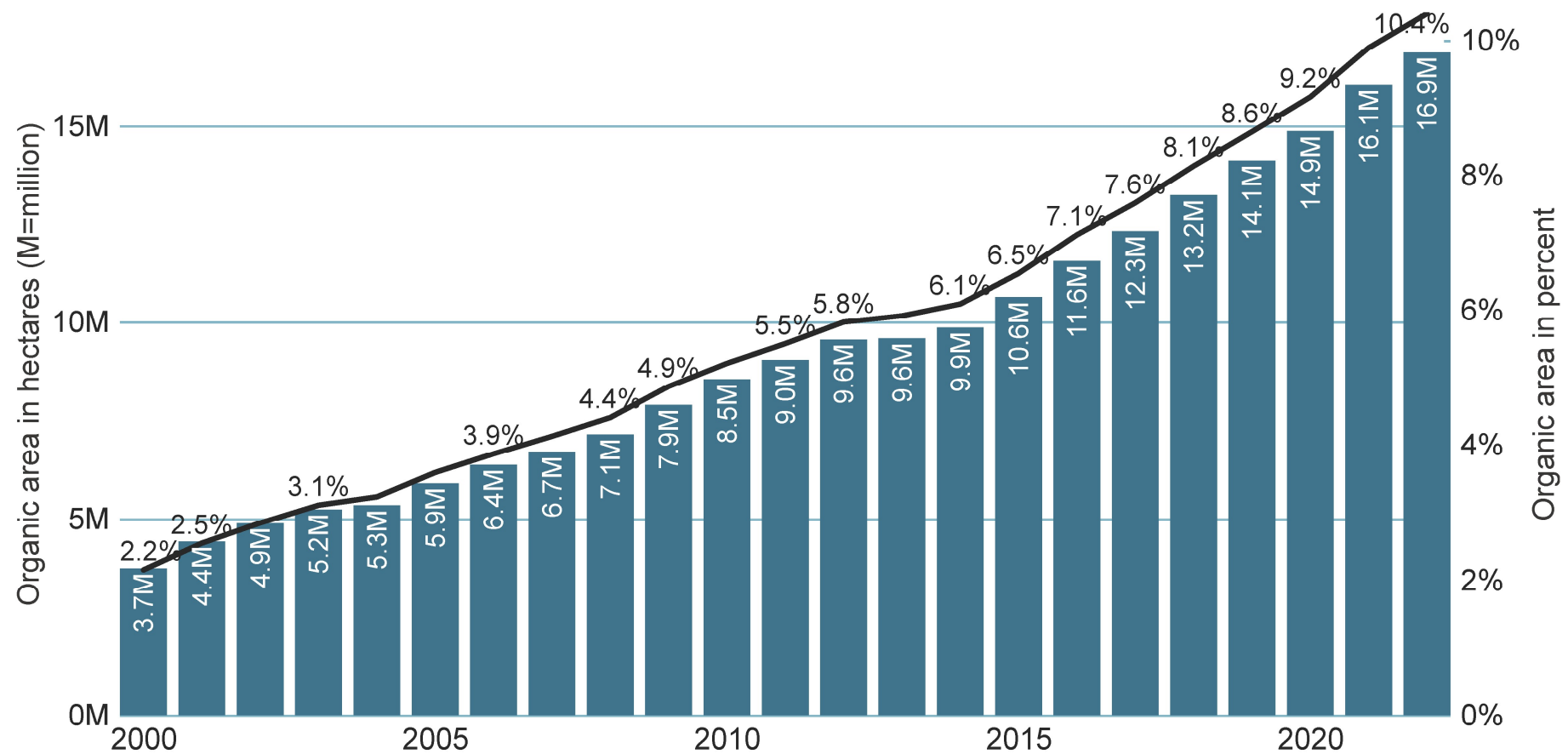
Europe and the European Union: Development of organic agricultural land 2000 - 2022

Source: FiBL-AMI surveys 2001-2024, based on the national data sources and Eurostat



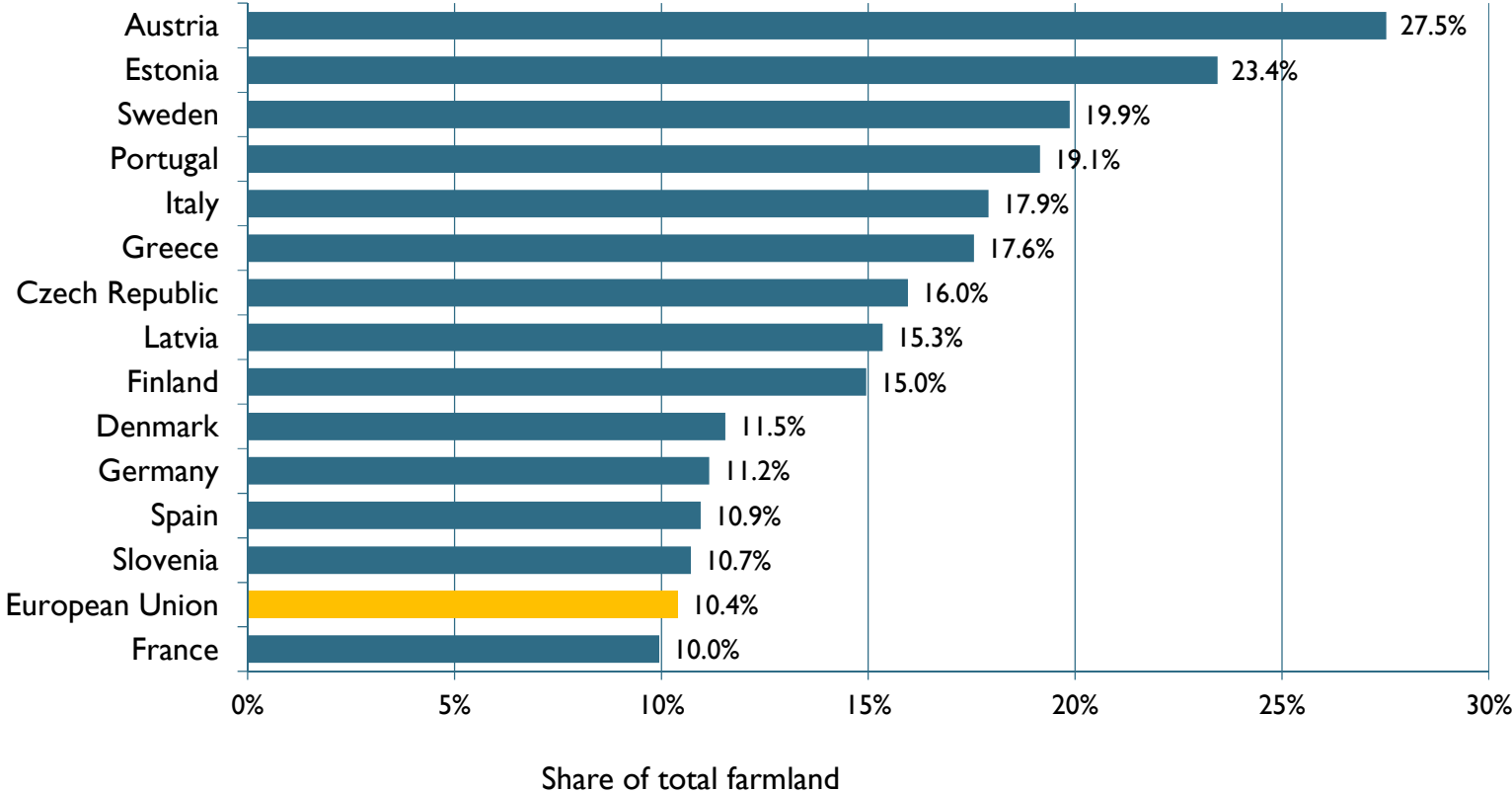
European Union: Growth of organic agricultural land and organic share 2000 - 2022

Source: FiBL-IFOAM-SOEL surveys 2001-2024



European Union: Countries with an organic area share of 10 % and more (14 countries)

Quelle: FiBL AMI survey 2024, based on national data sources and Eurostat

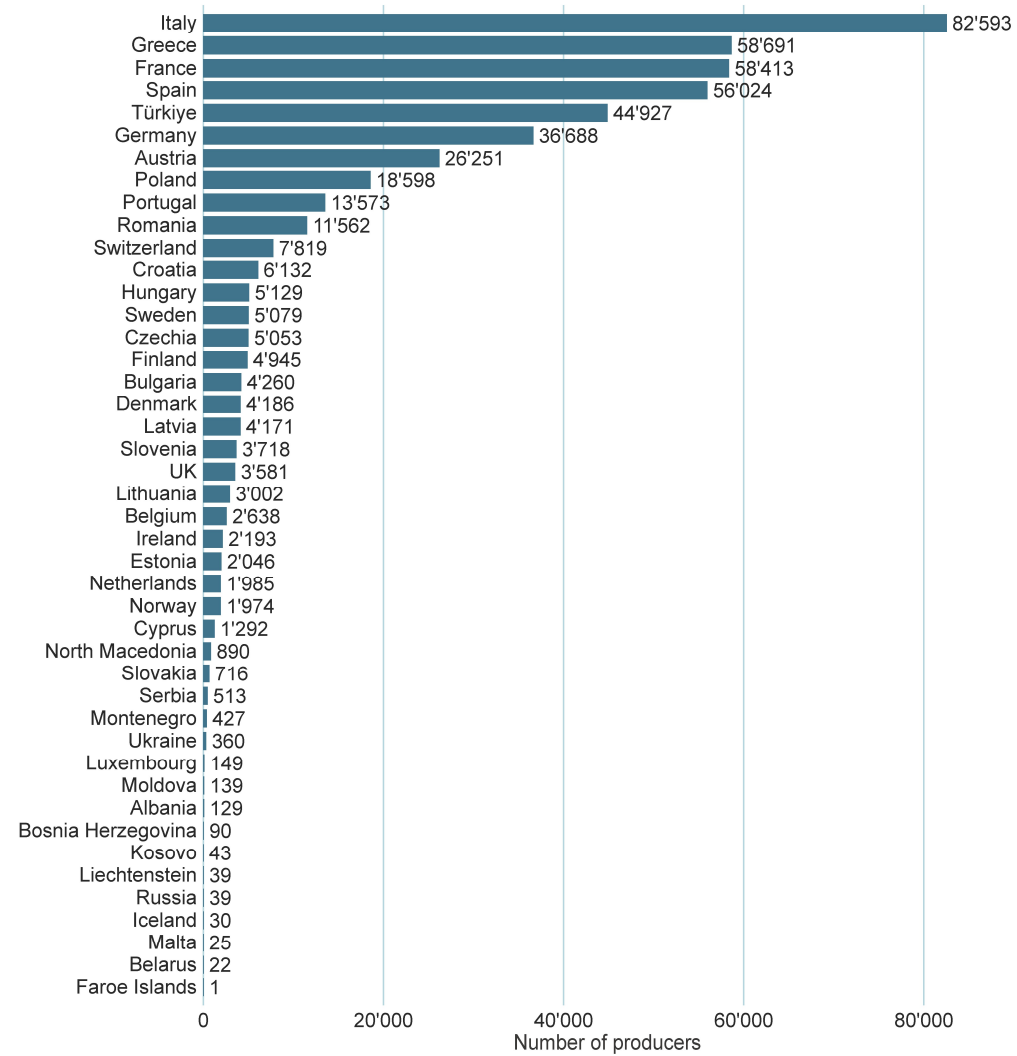


European Union: Countries with an organic area share of at least 10%

Organic producers and other operators

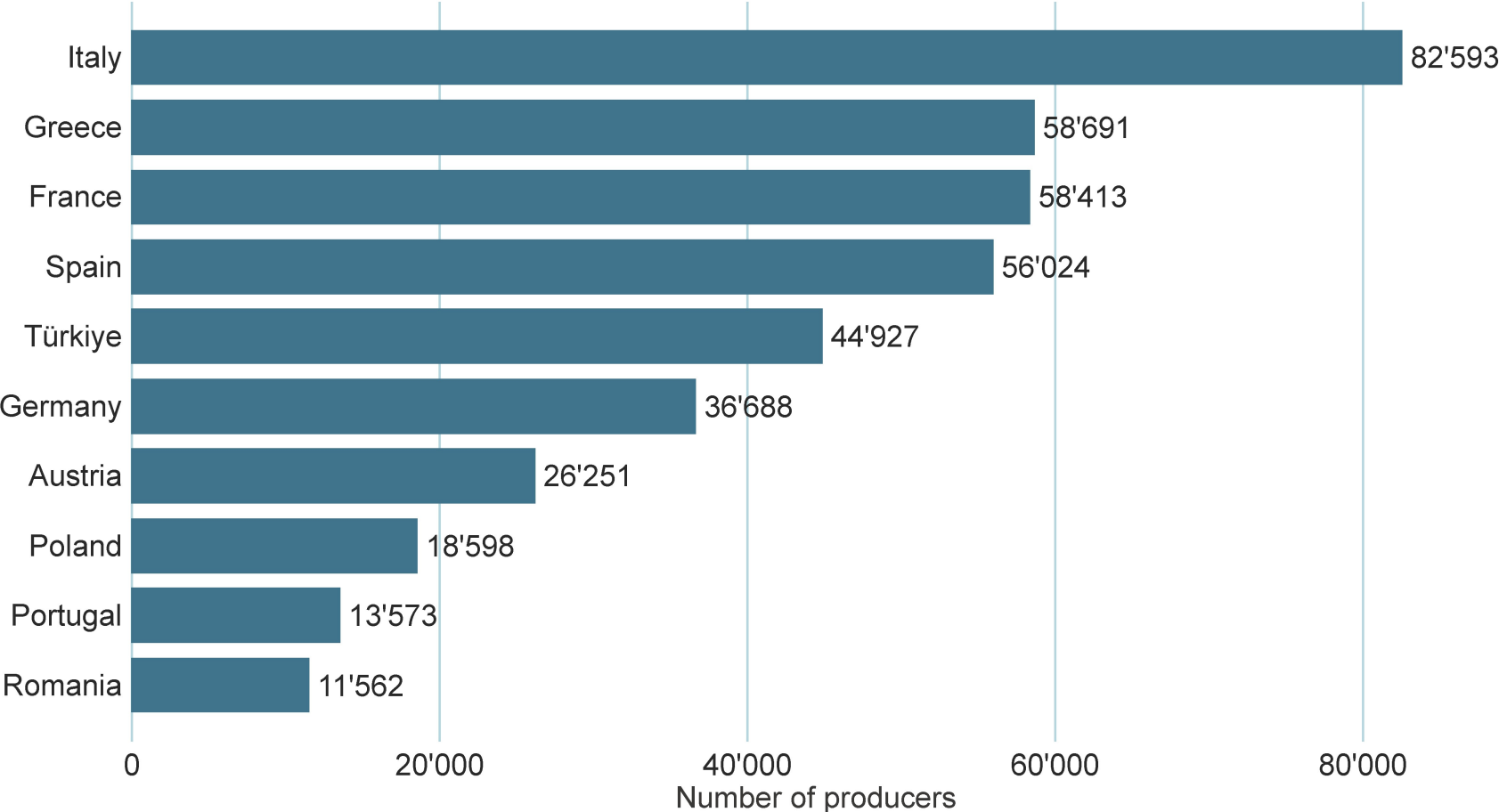
Europe: Organic producers by country 2022

Source: FiBL survey 2024



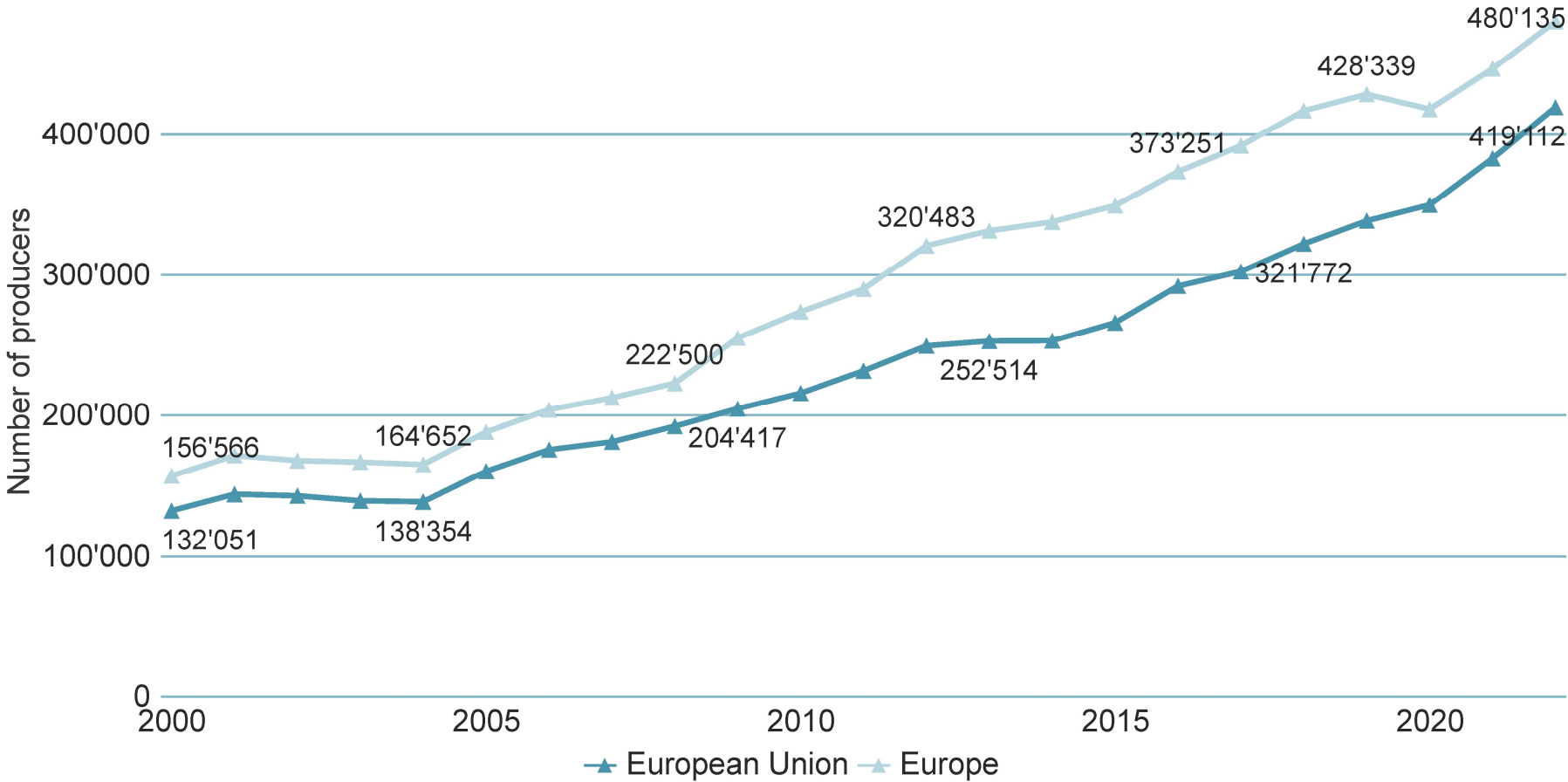
Europe: Organic producers by country 2022

Source: FiBL survey 2024



Europe and the European Union: Development of the number of organic producers 2000 - 2022

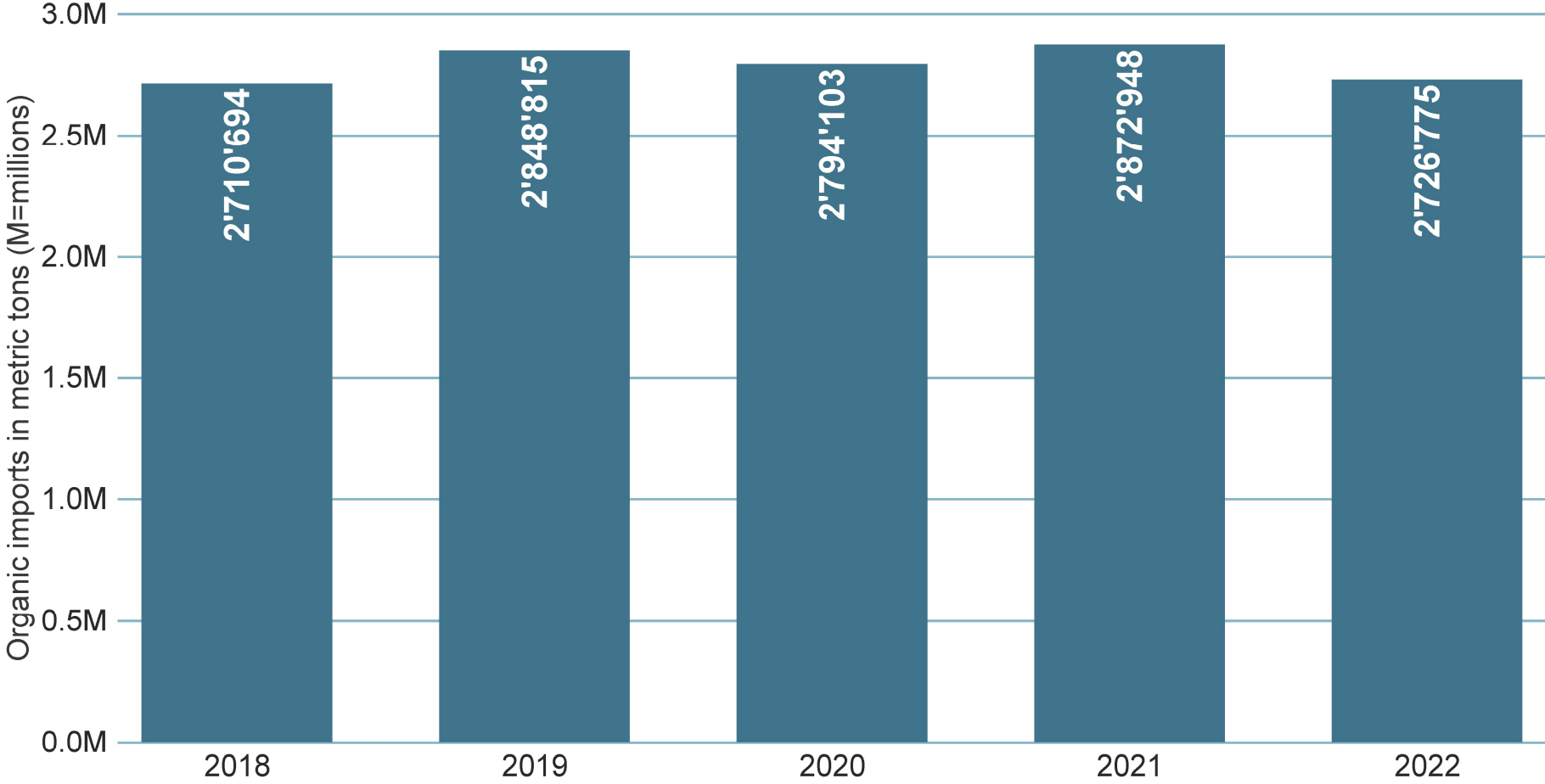
Source: FiBL survey 2024



International Trade

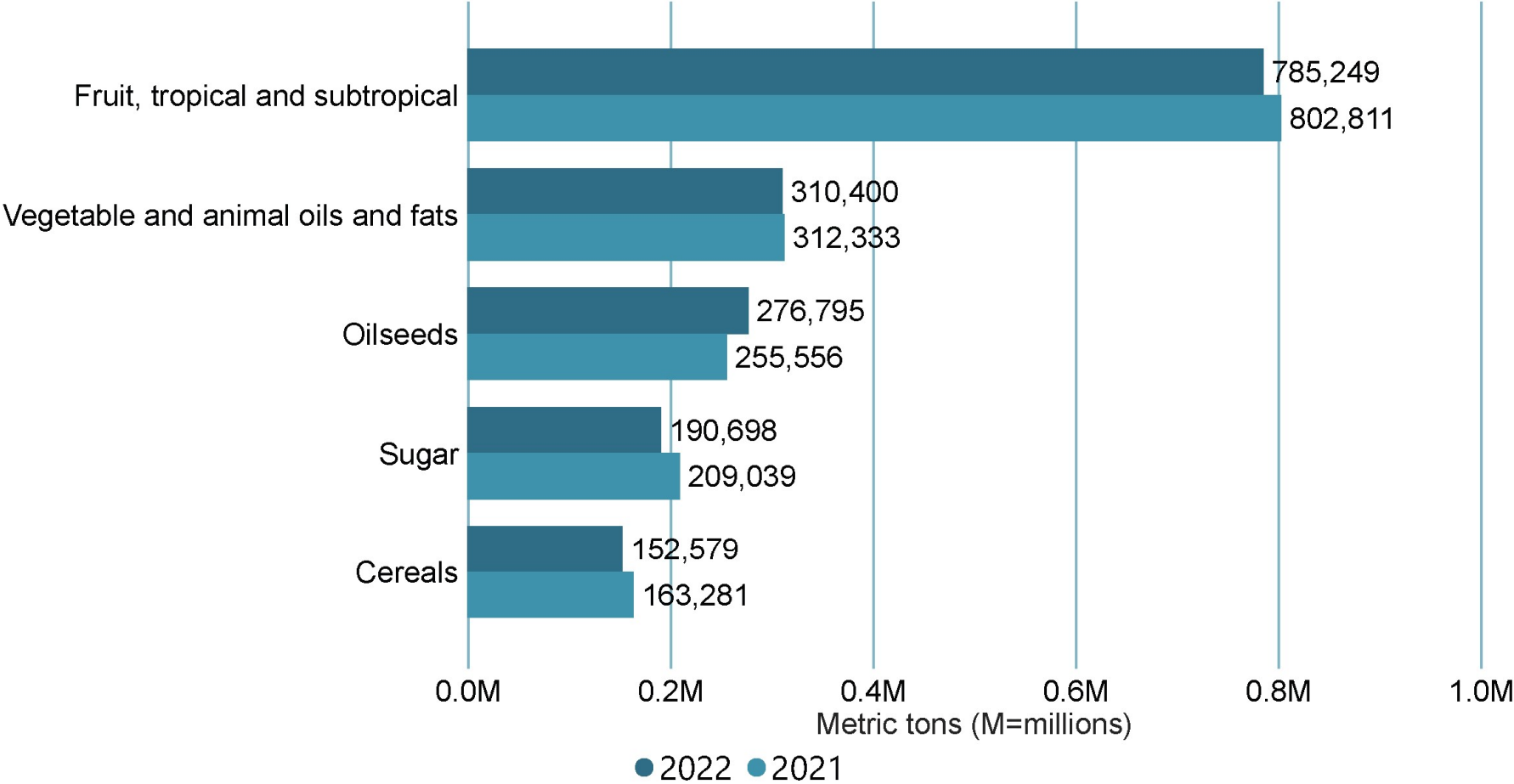
European Union: Organic agri-food imports development 2018 - 2022

Source: Traces/European Commission 2023



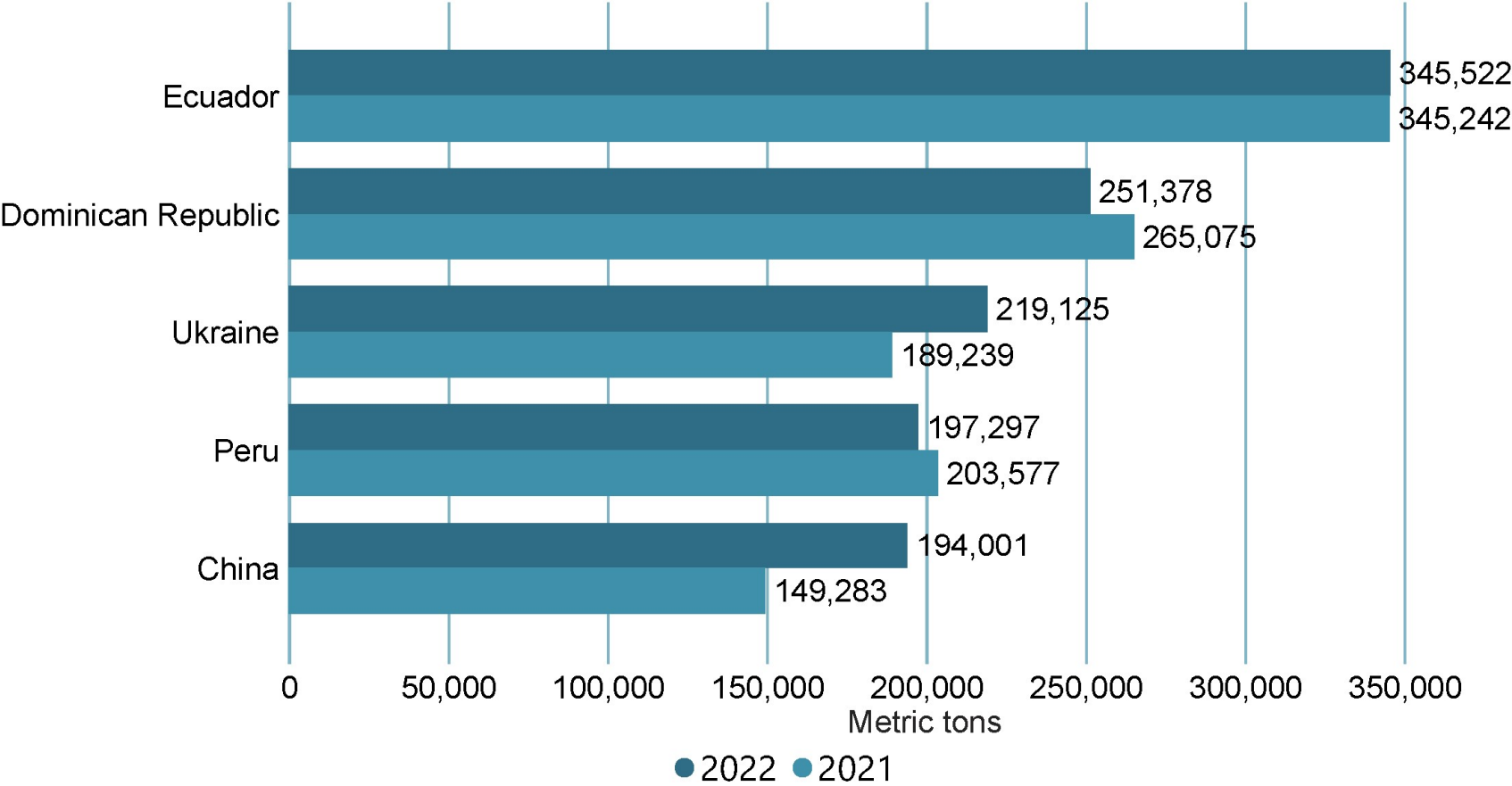
European Union: Main product categories of EU organic agri-food imports 2022

Source: Traces/European Commission 2024



European Union: The ten countries with the largest export volumes to the EU 2022

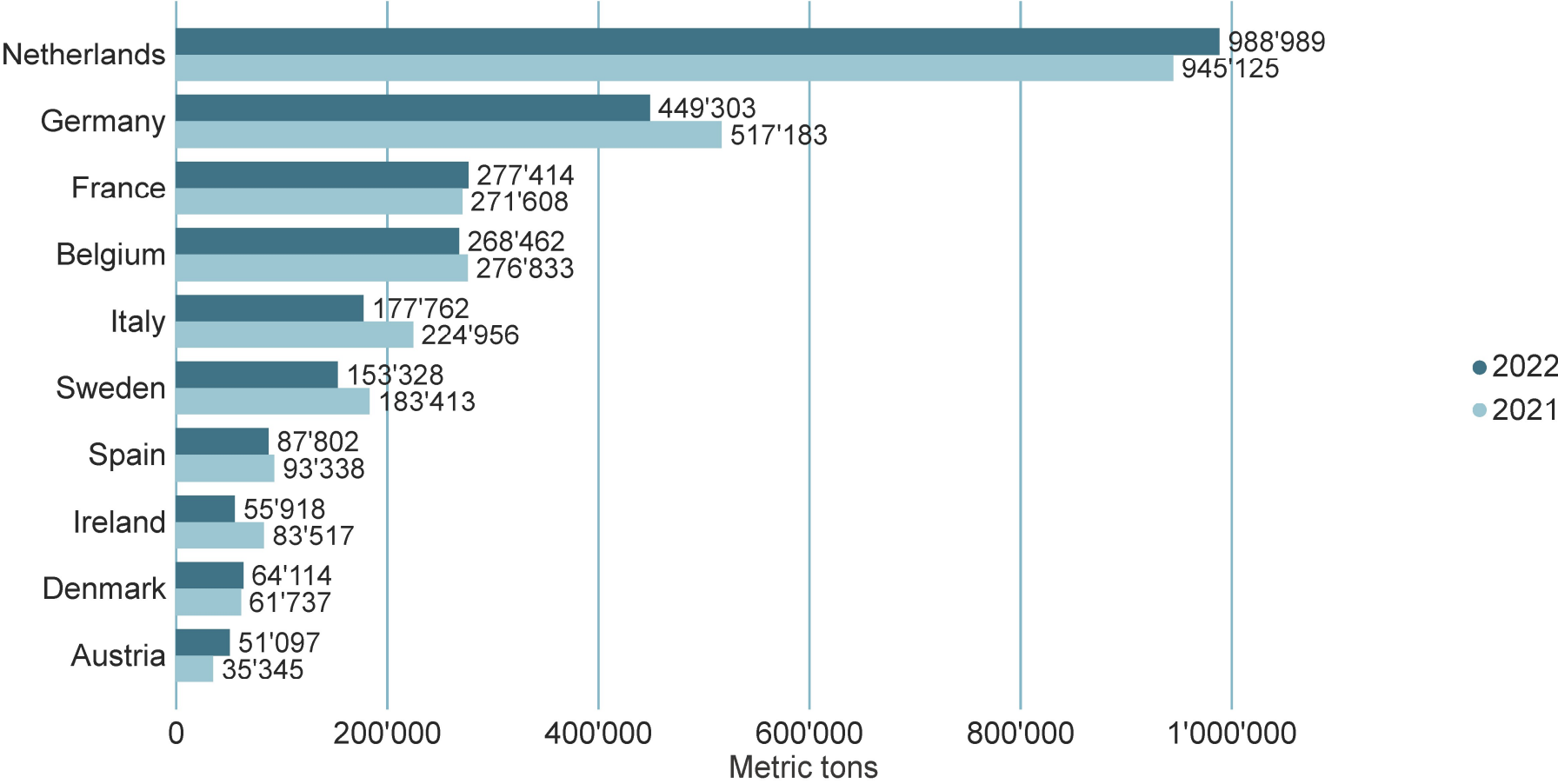
Source: Traces/European Commission 2024



European Union: Organic agri-food imports by country

2022

Source: Traces/European Commission 2023

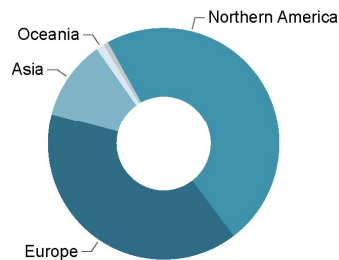


Organic retail sales development

EUROPE: ORGANIC RETAIL SALES 2022



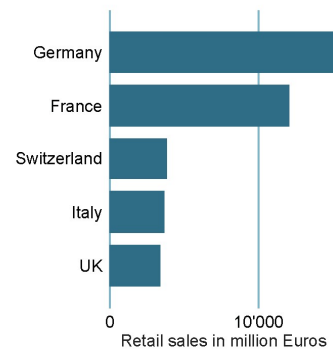
By continent, North America had the lead with 64.4 billion (bn) €, followed by Europe (53.1 billion €) and Asia (15.0 billion €).



Distribution of retail sales by region 2022



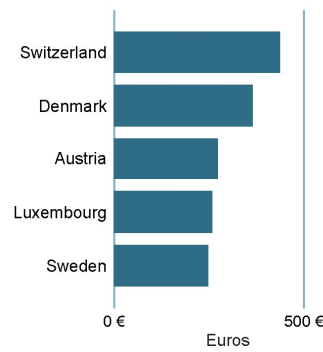
The European countries with the largest markets for organic food were Germany (15.3 billion €), France (12.1 billion €), Switzerland (3.9 billion €) and Italy (3.7 billion €).



The top 5 countries with the largest markets for organic food in 2022



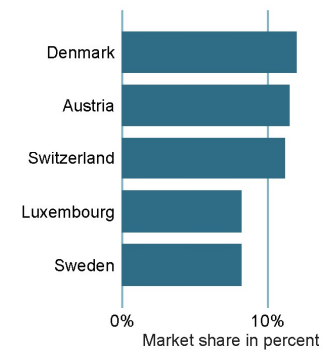
Switzerland had the highest per capita consumption worldwide, followed by Denmark, Austria, Luxembourg and Sweden.



Top 5 countries with the highest per capita consumption 2022



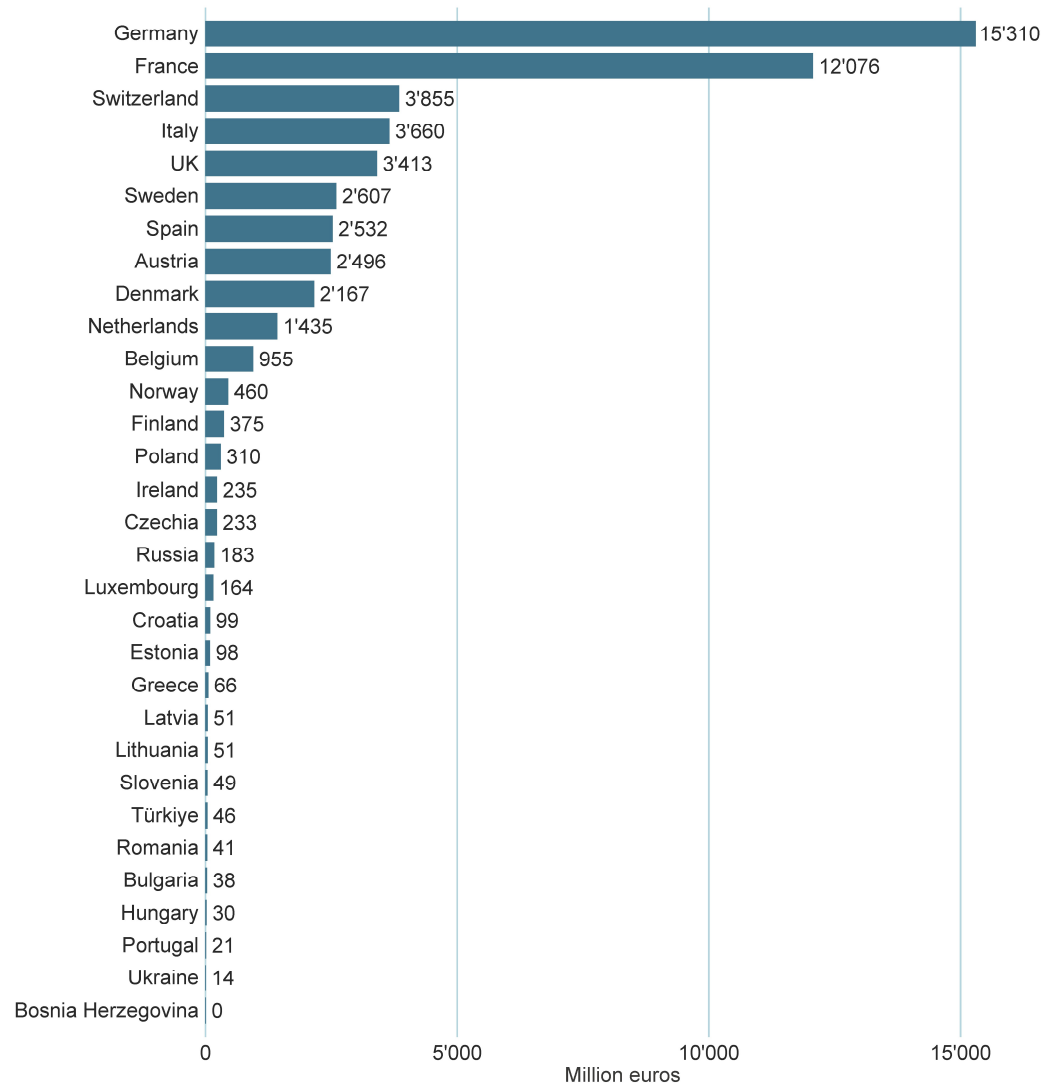
The highest organic share of the total market was in Denmark, followed by Austria, Switzerland, Luxembourg, and Sweden.



The 5 countries with the highest organic shares of the total market in 2022

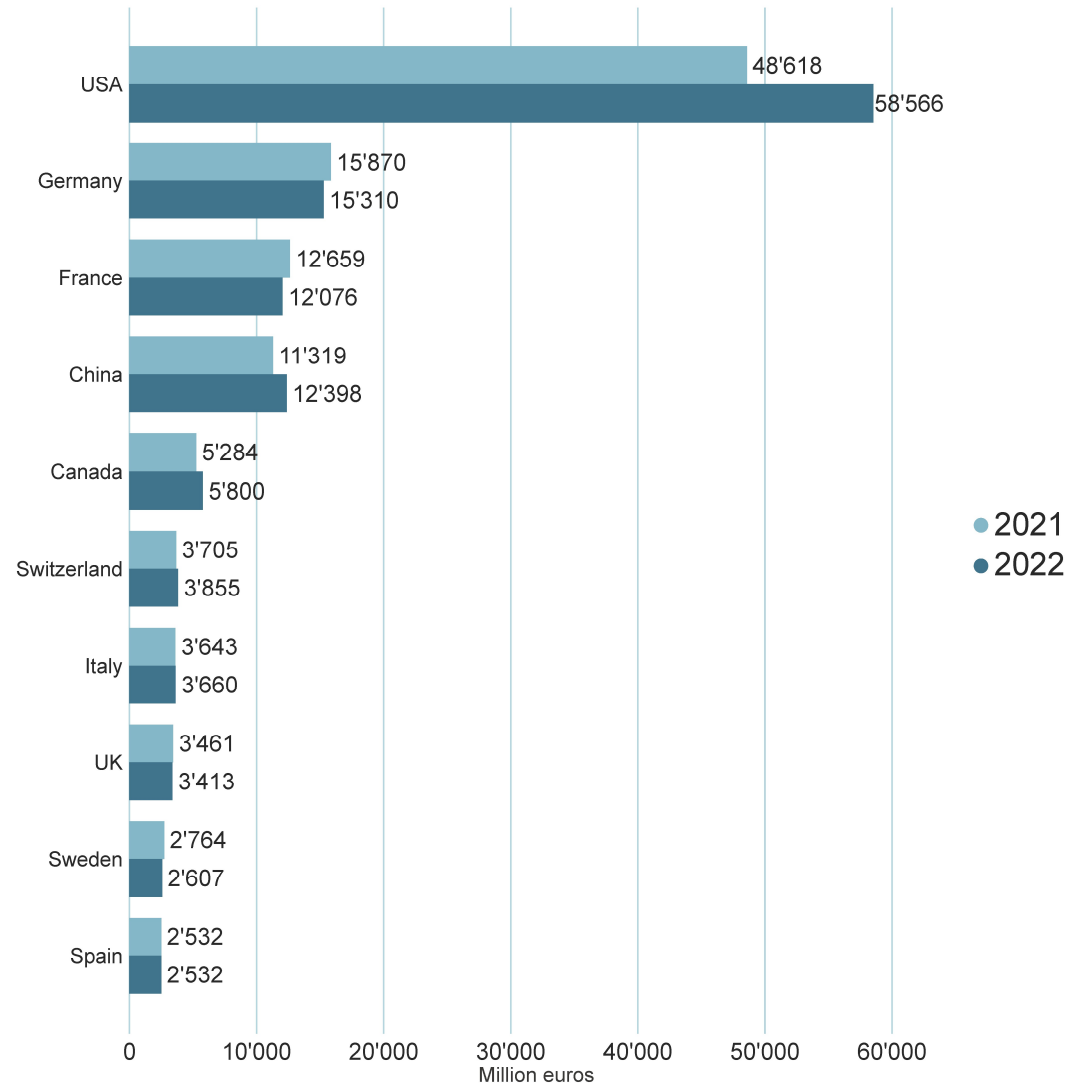
Europe: Organic retail sales by country 2022

Source: FiBL survey 2024



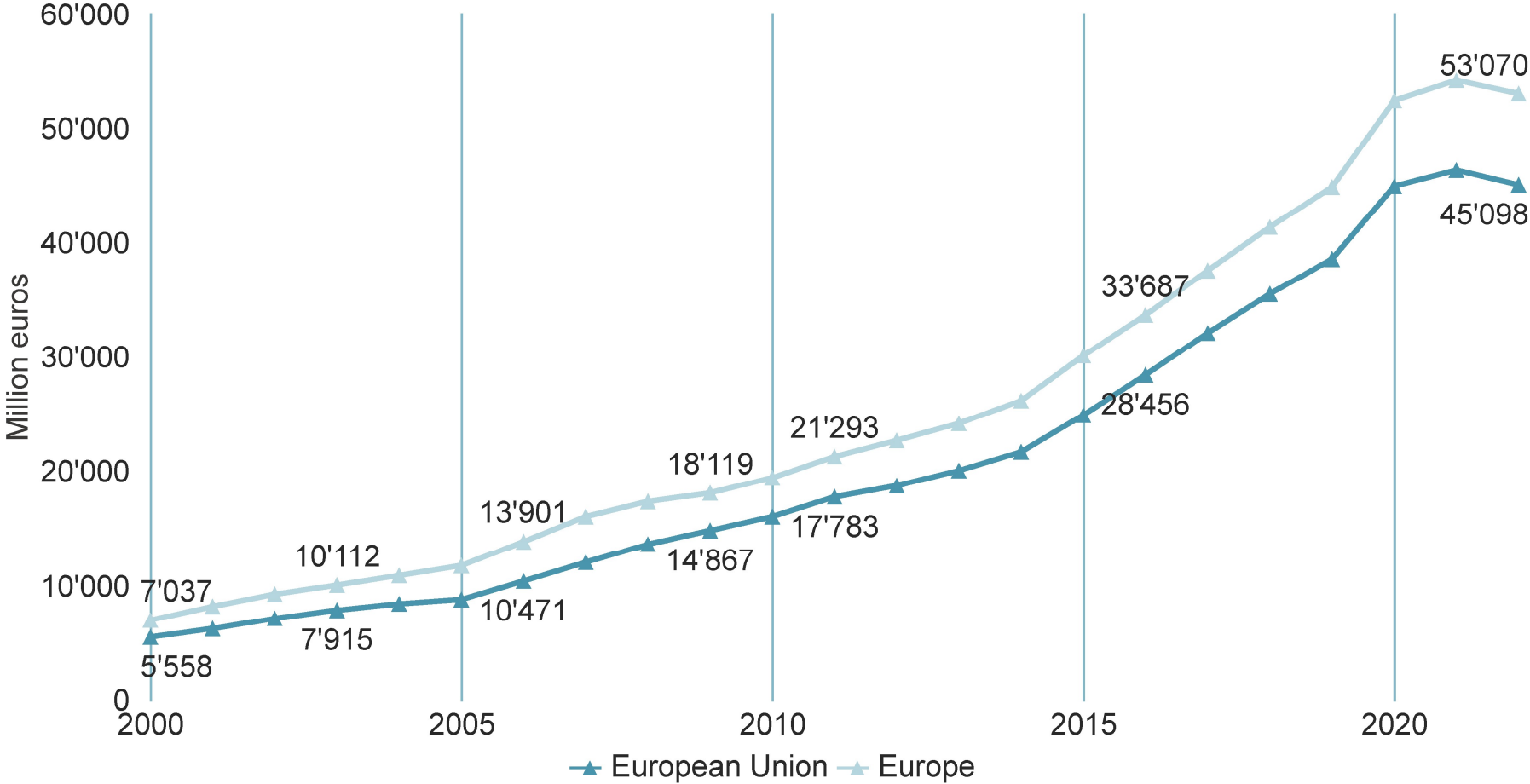
World: Top 10 organic markets in 2021 and 2022

Source: FiBL AMI survey 2024



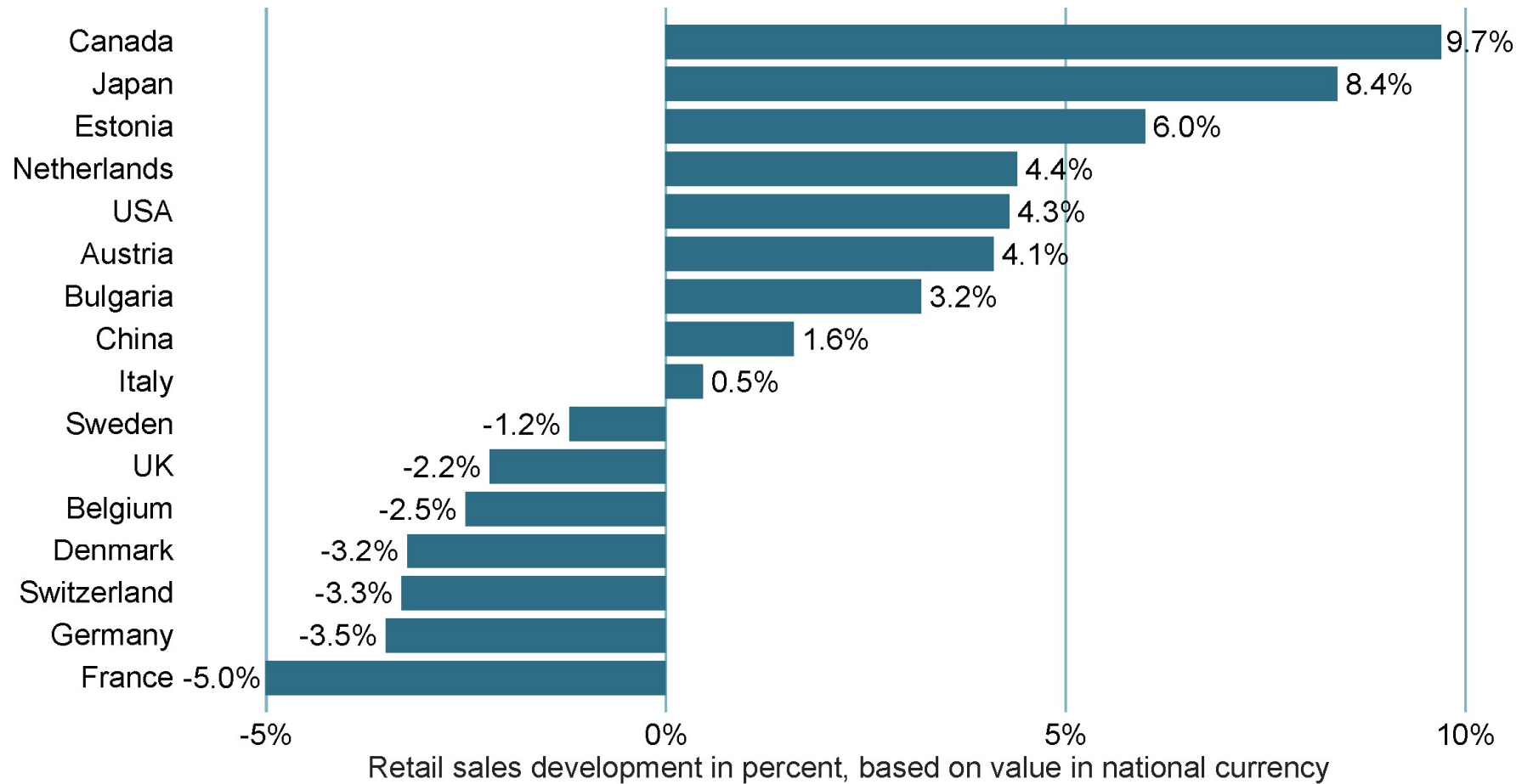
Europe and the European Union: Growth of organic retail sales 2000 - 2022

Source: FiBL-AMI surveys 2001-2023



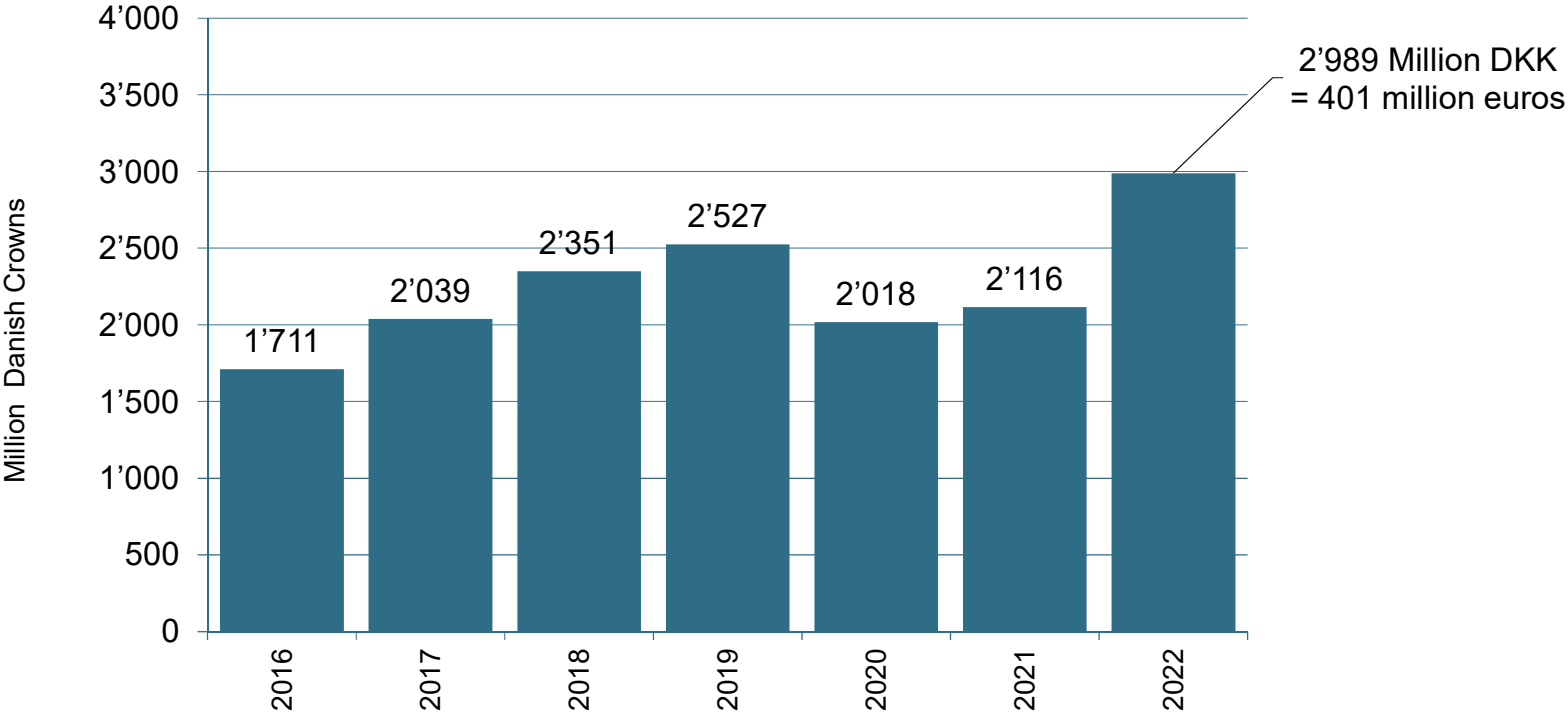
Development of organic retail sales 2022

Source: FiBL-AMI survey 2024



Development of food service in Denmark (in Danish Crowns)

Source: Statistics Denmark



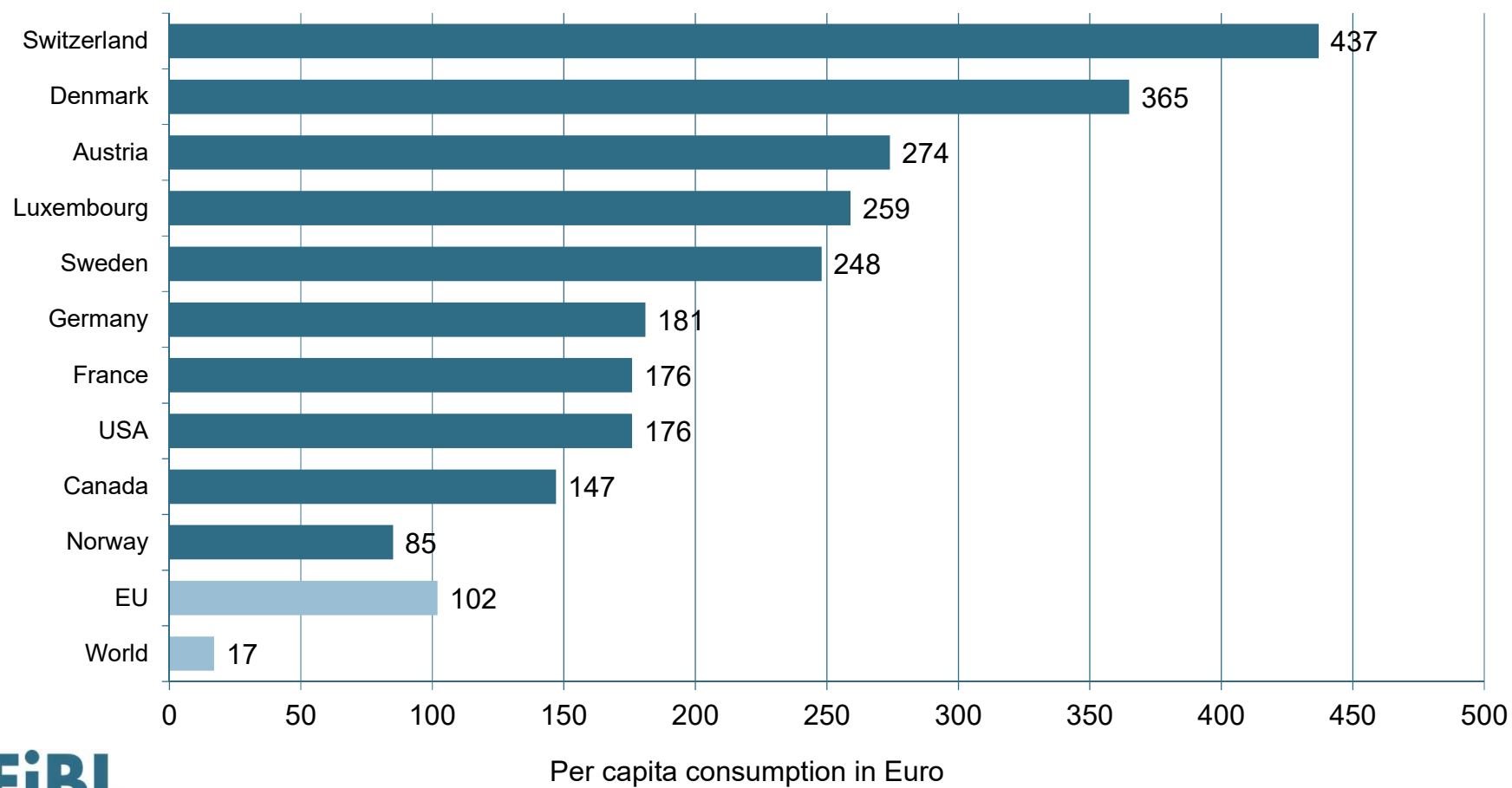
Growth food service
2019-2022: +18%

Growth retail sales
2019-2022: 9.2%

Denmark: Development of Food Service

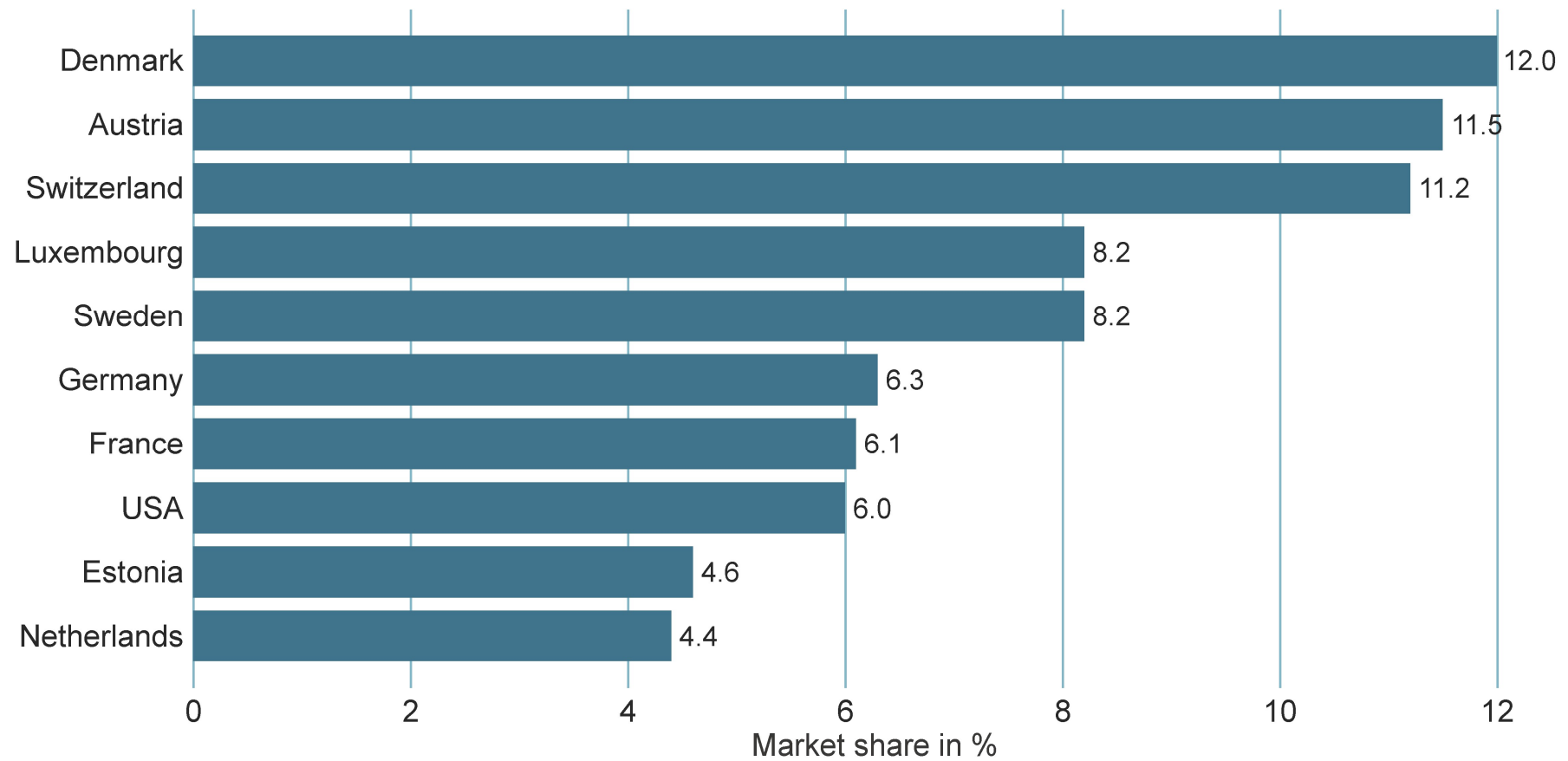
The ten countries with the highest per capita consumption 2022

Source: FiBL-AMI survey 2024



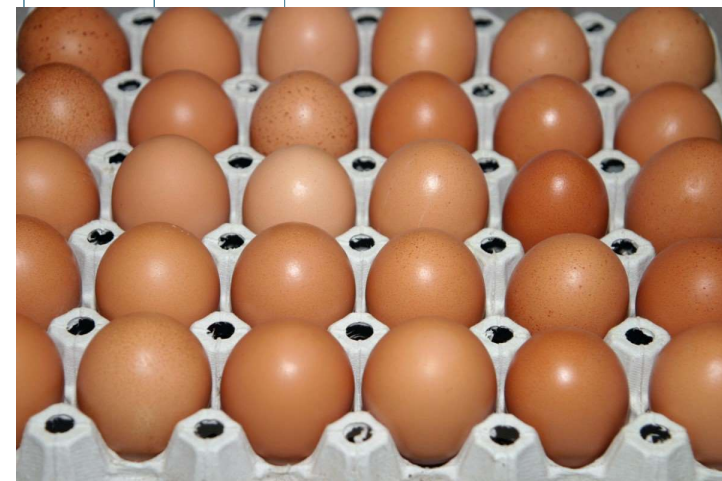
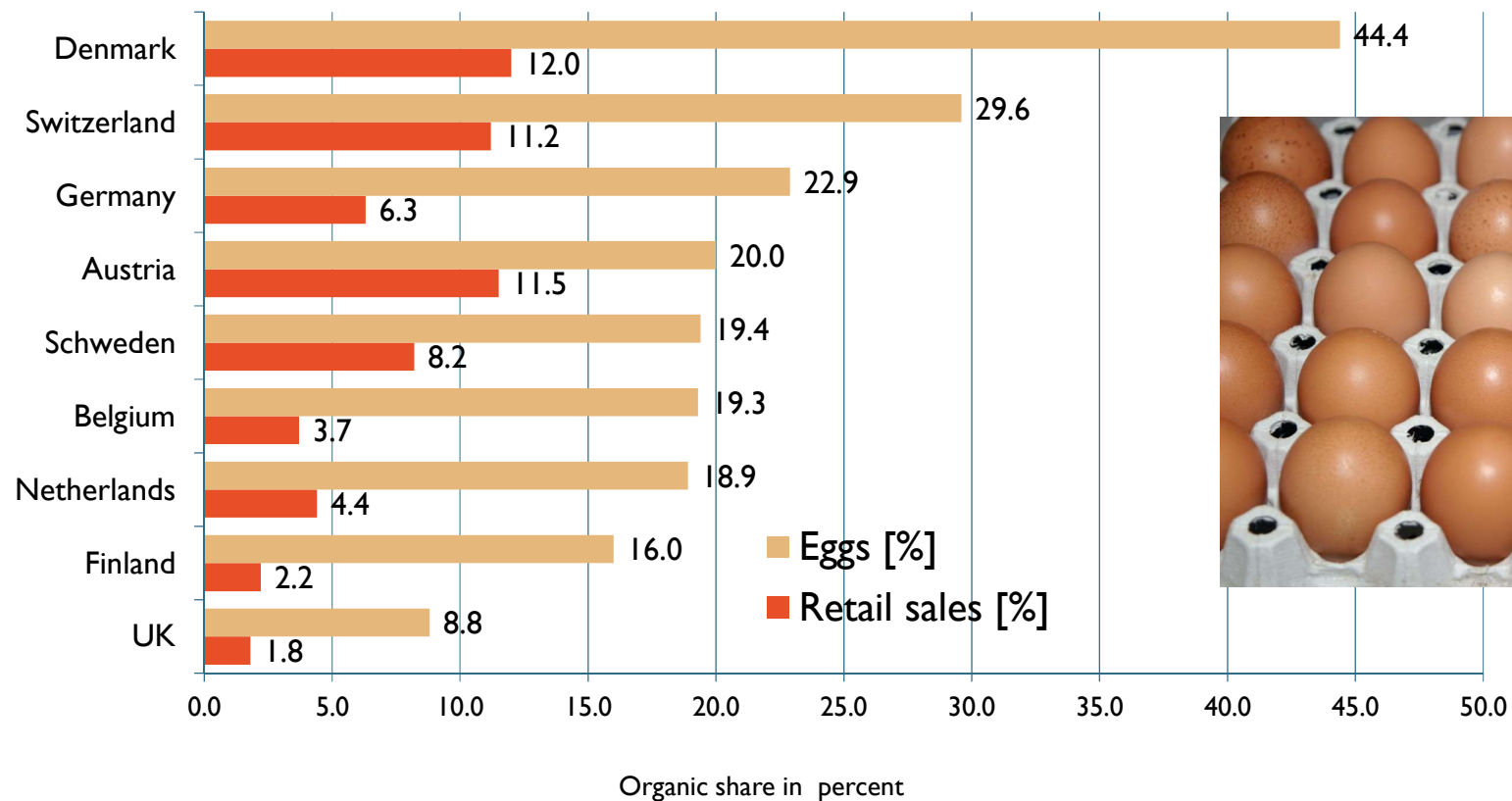
World: Top ten countries with the highest organic market shares of the total retail sales 2022

Source: FiBL-AMI survey 2024



Organic Eggs: Share of total eggs sold (value) 2022

Source: FiBL-AMI survey based national sources



Share of organic eggs/retail sales of total egg/retail sales value

Statistics Sessions at BIOFACH 2024

- 13 February, 3:45-4.45 PM:
The World of Organic Agriculture
- 13 February, 5.00-6.00 PM:
The European market for organic food
- 14 February, 1:30-3:00 PM:
Global Organic Market Overview
- 14 February, from 4:00 PM:
Reception at the FiBL Stand (Hall 3A, 509)

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Conclusions

- **More than 18 million hectares of farmland** were organic in Europe in 2022 – **France had the largest area**. In 2022, **over 10% of the European Union's farmland was organic**.
- Organic farmland in the EU **increased by more than 0.8 million hectares (5.1%)**; however, in Europe, it only **increased by 0.2 million hectares** (due to drops in the Russian Federation and Ukraine).
- **Liechtenstein** continued to be the country with the highest organic area share in the world (**43.0%**), followed by **Austria**, in terms of area share (**27.5%**), the number 1 country in the European Union.
- **Organic imports to EU declined by 5.1%** – Ecuador was the largest supplier; tropical fruit were the most important commodity group.
- Retail sales were at more than **53.1 billion euros (45.1 billion euros in EU)**.
- The European market experienced a **2.2 percent drop (EU: -2.8 percent)**.
- **Food service sales**, however, **increased**.
- The highest organic **market shares (Denmark)** and **per capita (Switzerland) consumption** continued to be in Europe.

More information

- <https://www.organic-world.net/yearbook/yearbook-2024.html>:
- <https://statistics.fibl.org>,
interactive online tables and infographics
- [www.twitter.com@fiblstatistics](https://www.twitter.com/fiblstatistics)

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- helga.willer@fibl.org
- www.fibl.org, www.organic-world.net, statistics.fibl.org

- Helga Willer, Jan Trávníček, und Bernhard Schlatter (Hrsg.) (2024): The World of Organic Agriculture. Statistics and Emerging Trends 2024. Research Institute of Organic Agriculture FiBL, Frick, and IFOAM – Organics International, Bonn
- <http://www.organic-world.net/yearbook/yearbook-2024.html>

FiBL online



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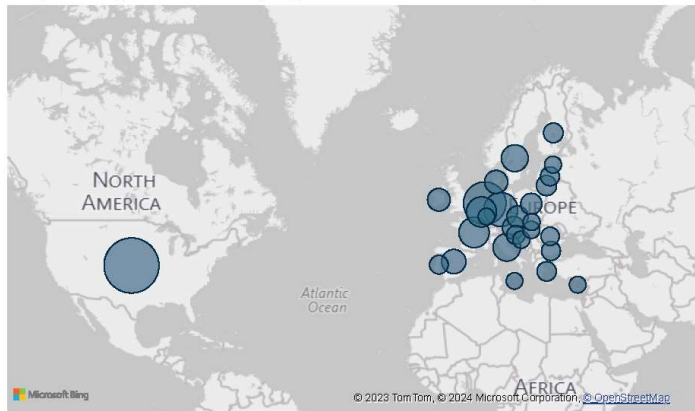
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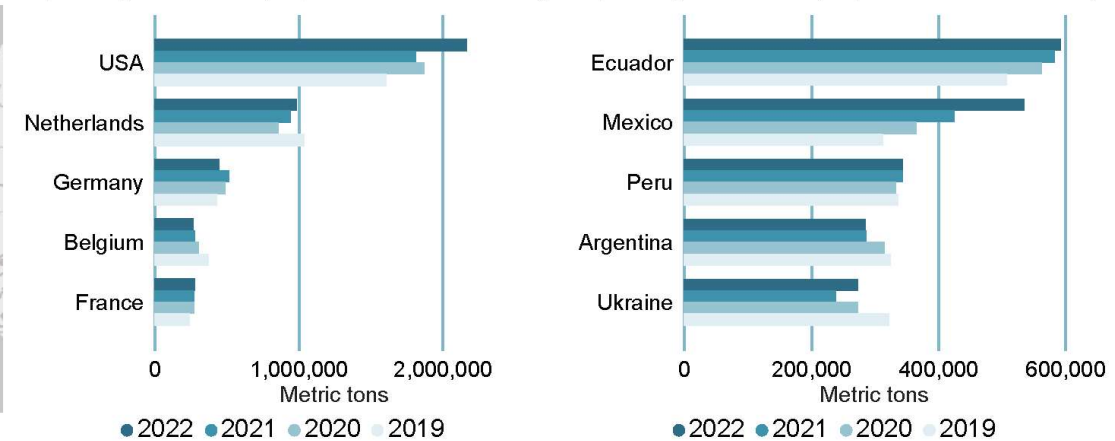
Import: Organic agri-food import to the European Union and the USA 2022

Sources: Traces/European Commission and USDA

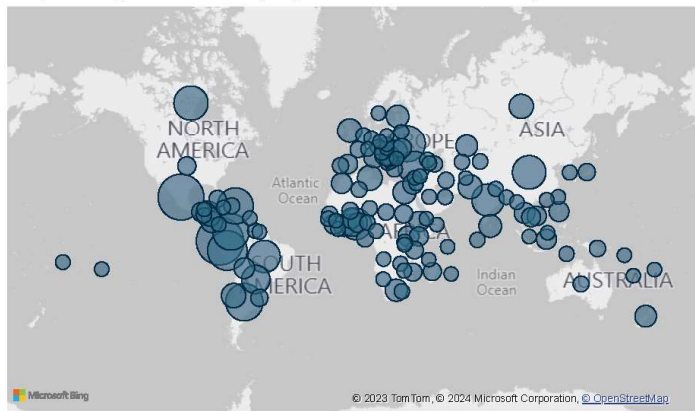
Importing countries (imports in metric tons)



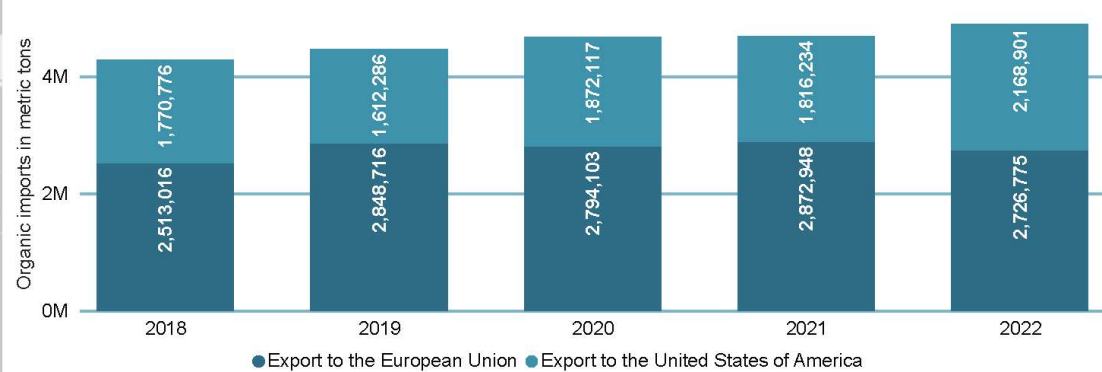
Importing countries (imports in metric tons) Exporting countries (exports in metric tons)



Exporting countries (exports in metric tons)

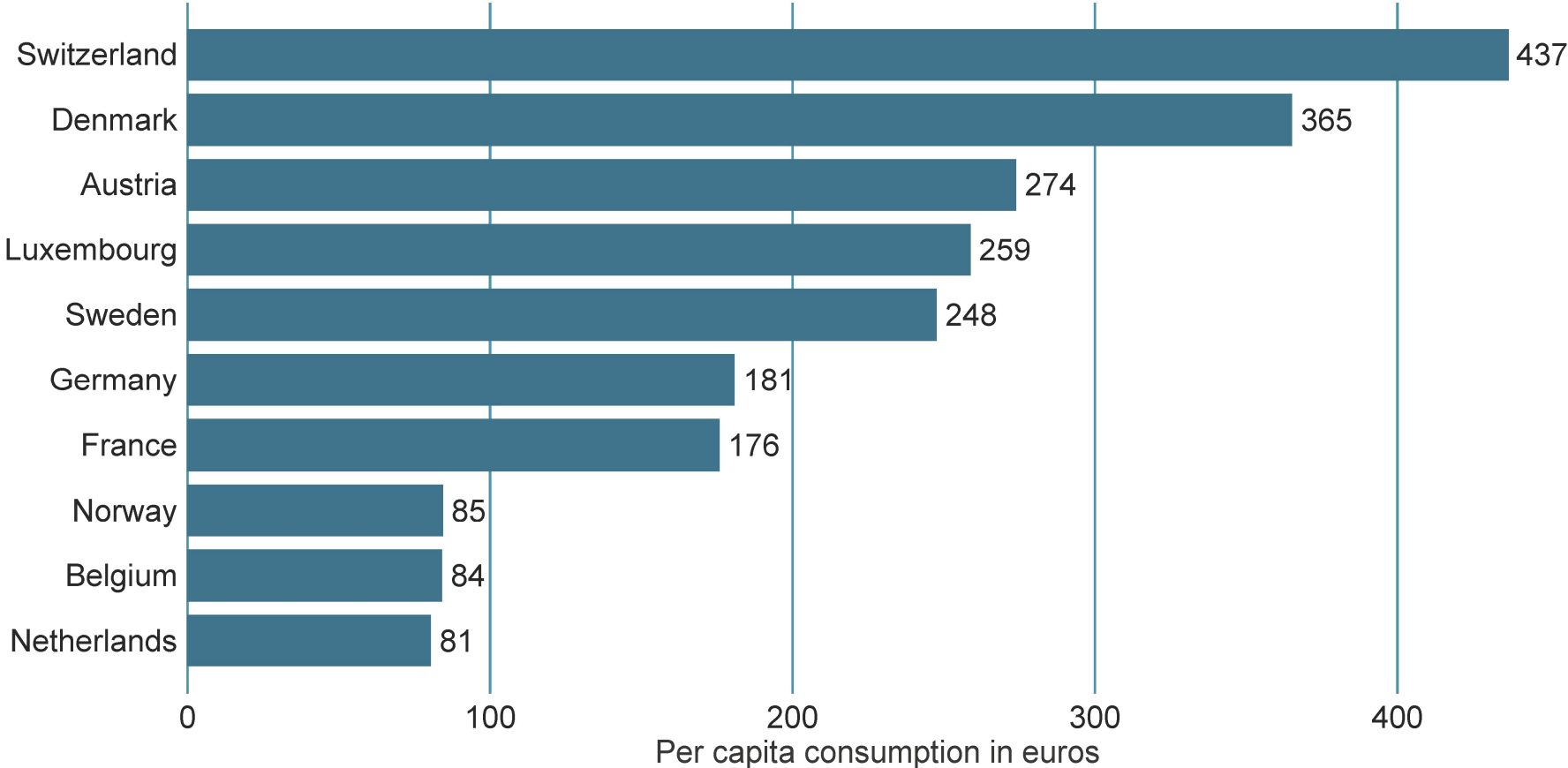


The development of organic imports to the European Union and US in metric tons



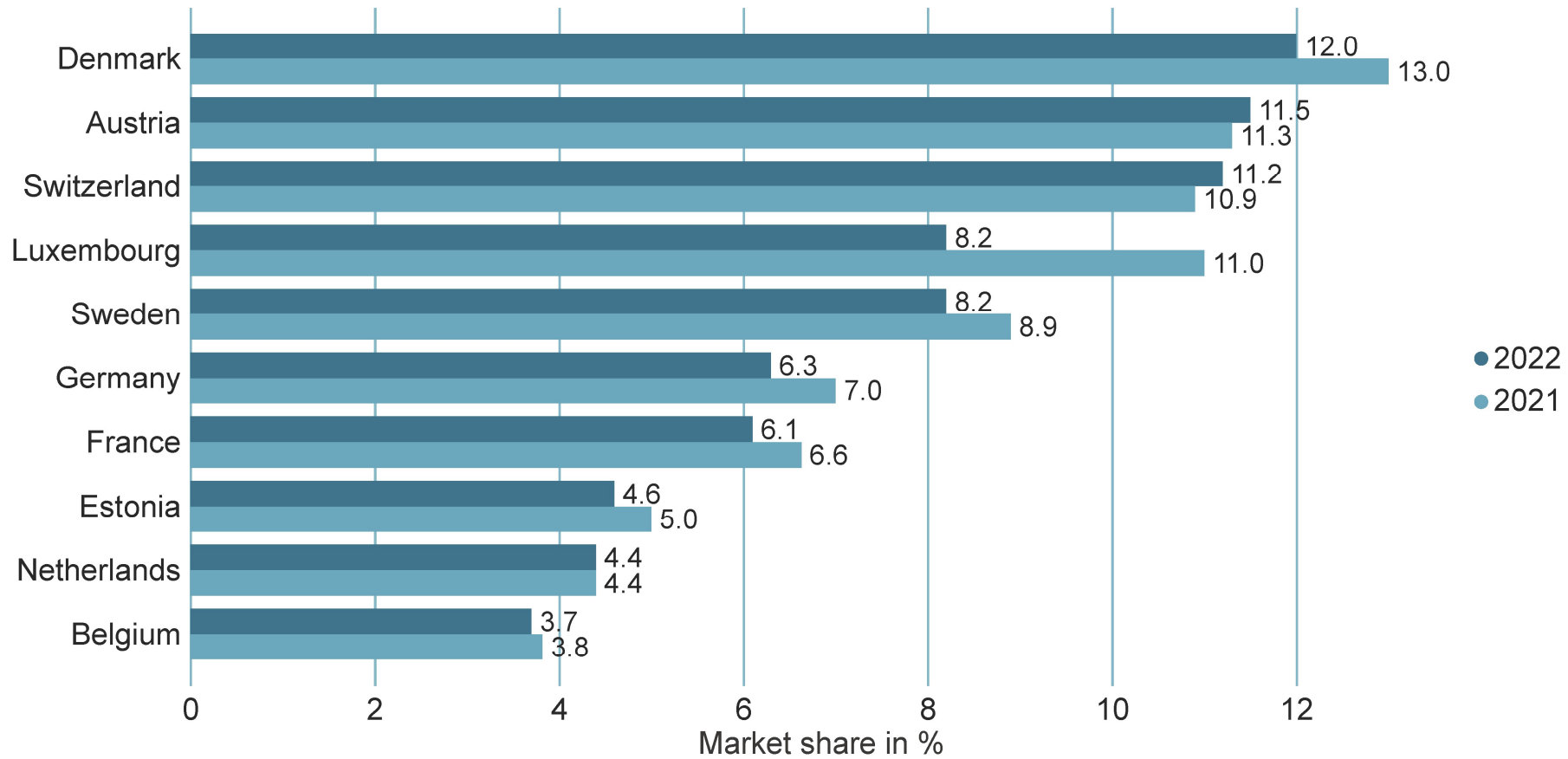
Europe: The countries with the highest per capita consumption 2022

Source: FiBL-AMI survey 2024



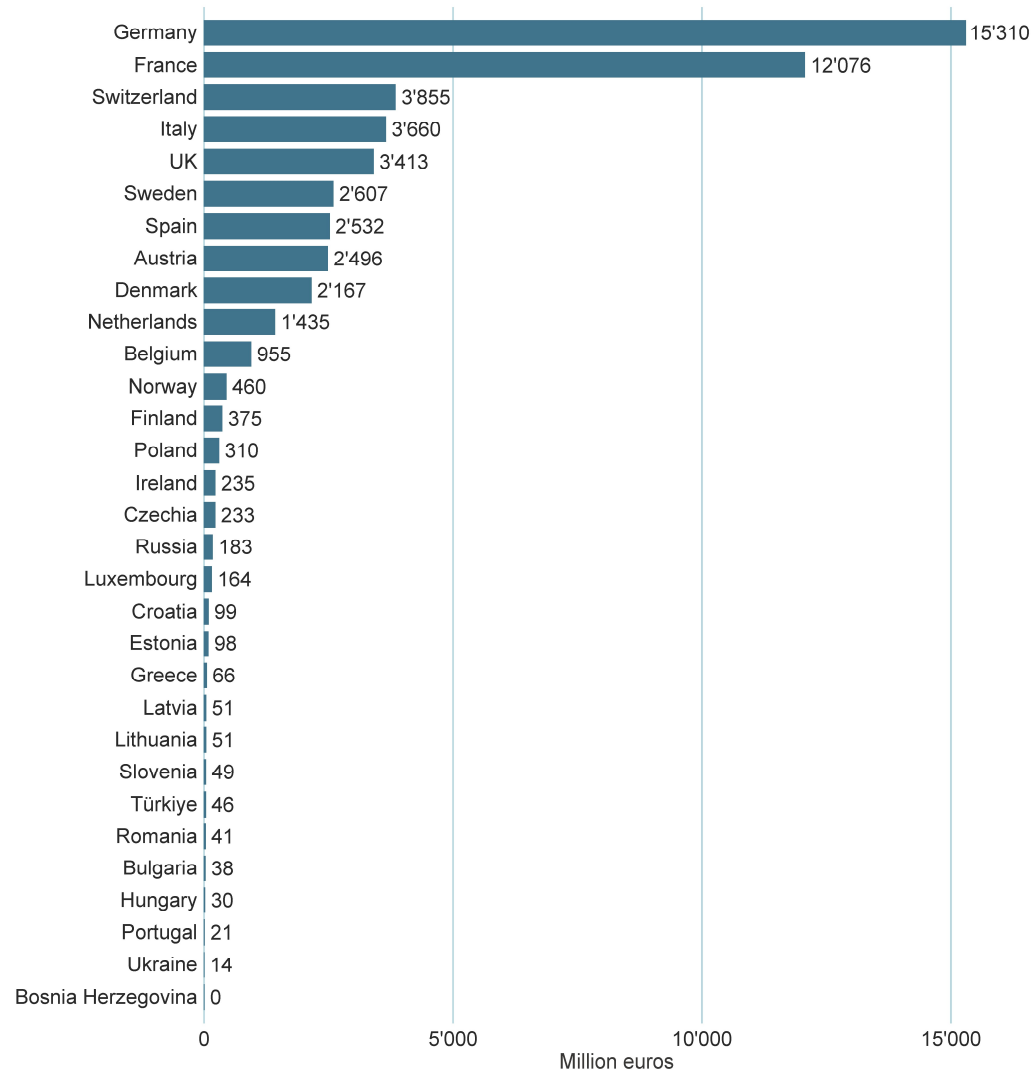
Europe: The countries with the highest shares of the total retail sales 2021 and 2022

Source: FiBL-AMI survey 2024



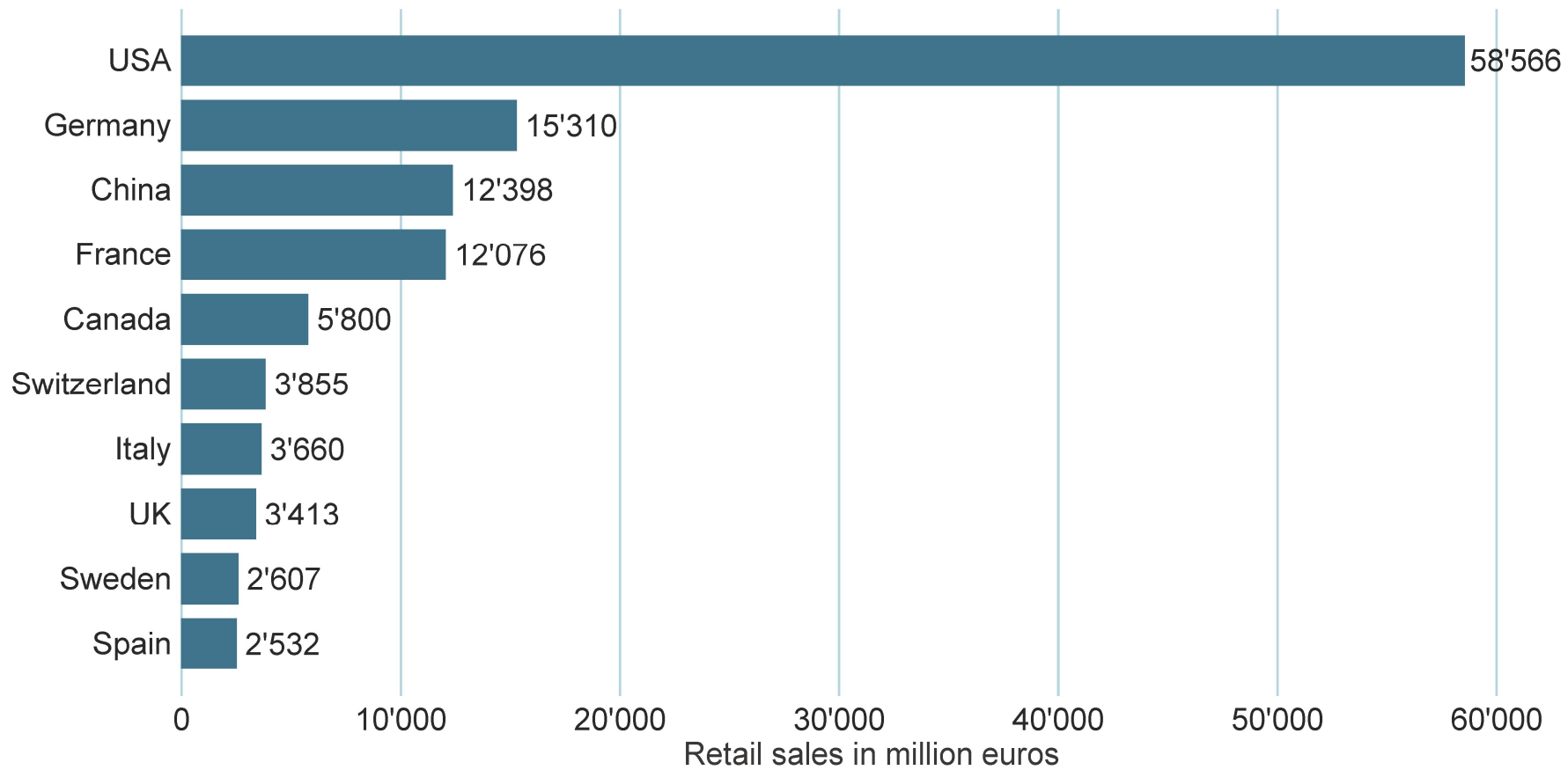
Europe: Organic retail sales by country 2022

Source: FiBL survey 2024



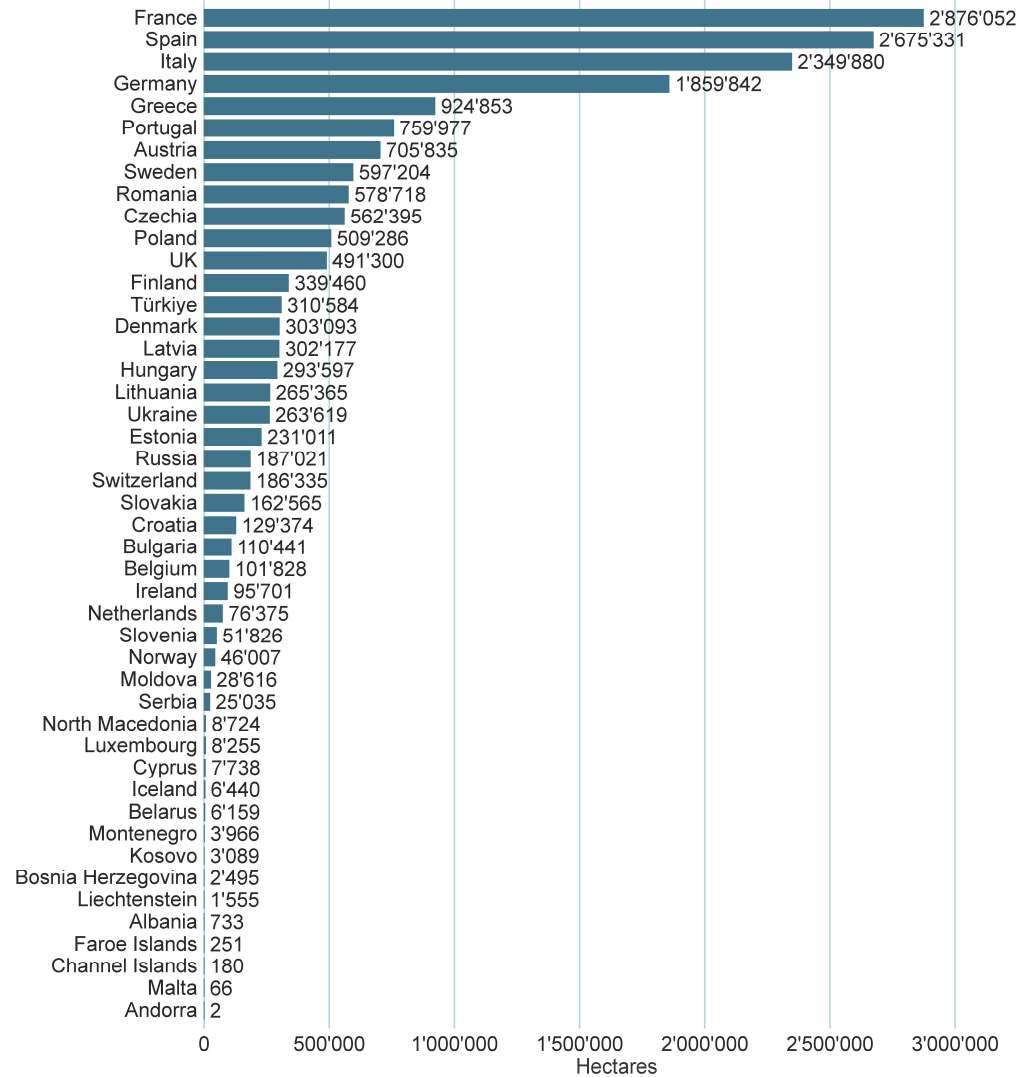
World: The countries with the largest markets for organic food 2022

Source: FiBL-AMI survey 2024



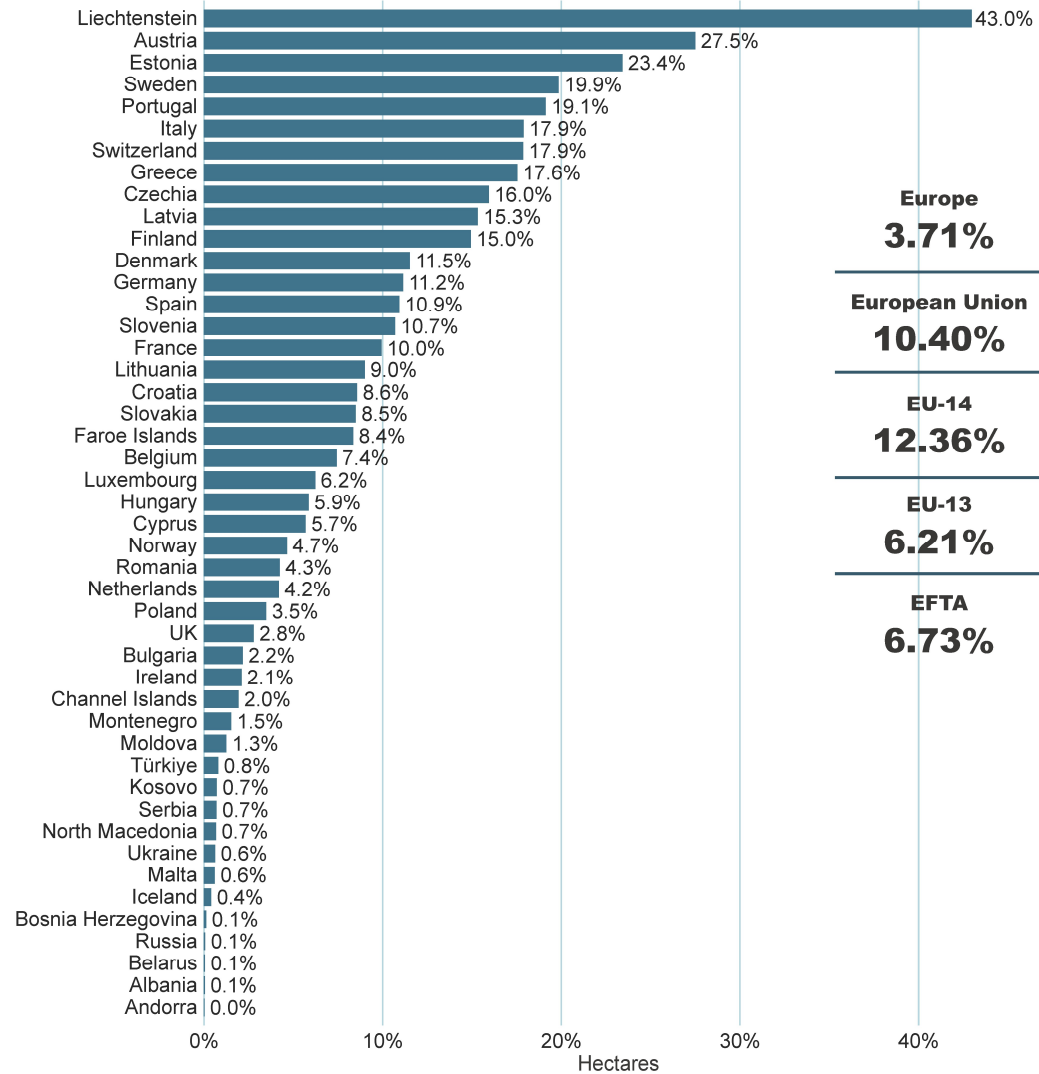
Europe: Organic agricultural land by country 2022

Source: FiBL-AMI survey 2024



Europe: Organic shares of total agricultural land 2022

Source: FiBL-AMI survey 2024



Organic agriculture in Europe: Key data 2022

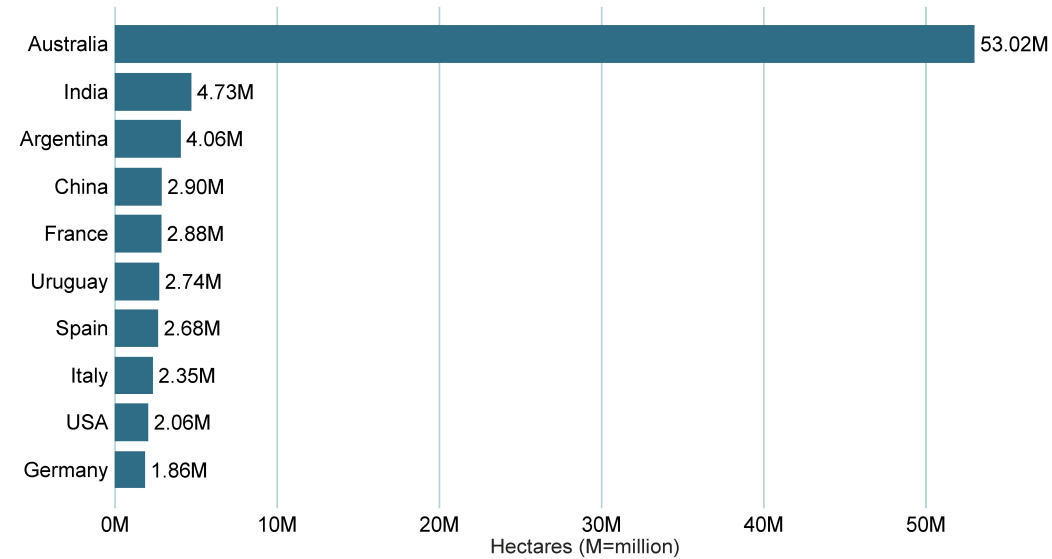
- By the end of 2022, in Europe more than 18.5 million hectares of organic agricultural land (European Union: 16.9 million hectares) were managed organically.
- Overseen by over 480'000 producers (European Union: over 419'000).
- Within Europe, organic agriculture covered 3.7 percent of the agricultural area (European Union: 10.4 percent).
- Organic farmland witnessed an increase of over 0.2 million hectares in Europe and 0.8 million hectares in the European Union compared to 2021.
- The leading countries in terms of organic agricultural areas were France (2.9 million hectares), Spain (2.7 million hectares), and Italy (2.3 million hectares).
- Notably, 16 countries had at least 10 percent of their farmland dedicated to organic practices, with Liechtenstein leading at 43.0 percent, followed by Austria (27.5 percent) and Estonia (23.4 percent).
- In 2022, retail sales of organic products amounted to 53.1 billion euros (European Union: 45.1 billion euros), representing a 2.2 percent decrease (-2.8% in the EU) since 2021.
- Germany ranked as the largest market for organic products with retail sales of 15.3 billion euros, followed by France (12.1 billion euros) and Switzerland (3.9 billion euros)
- Across Europe, 43 countries have legislation governing organic agriculture.
- While organic farmland grew by 5 percent, consolidated data for 2022 indicate stagnation or even decline in retail sales in several countries.

EU organic imports

- Imports of organic agri-food products in the EU declined from 2.87 million metric tons in 2021 to 2.73 million metric tons in 2022, marking a 5.1% decrease.
- This decline may be linked to reduced demand, likely stemming from a significant rise in food prices during the year.
- The decrease was mainly driven by reduced imports of fruit and vegetables, sugar, olive and palm oils, sunflower seed, and pet food, with increased imports of organic soybeans, oilcakes, citrus fruit, rice, and honey failing to offset these losses.

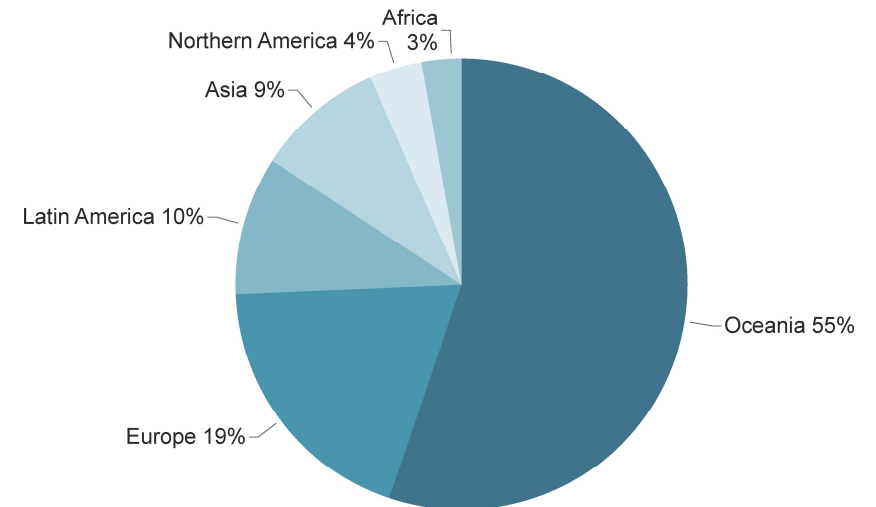
World: The ten countries with the largest areas of organic agricultural land 2022

Source: FiBL survey 2024



World: Distribution of organic agricultural land by region 2022

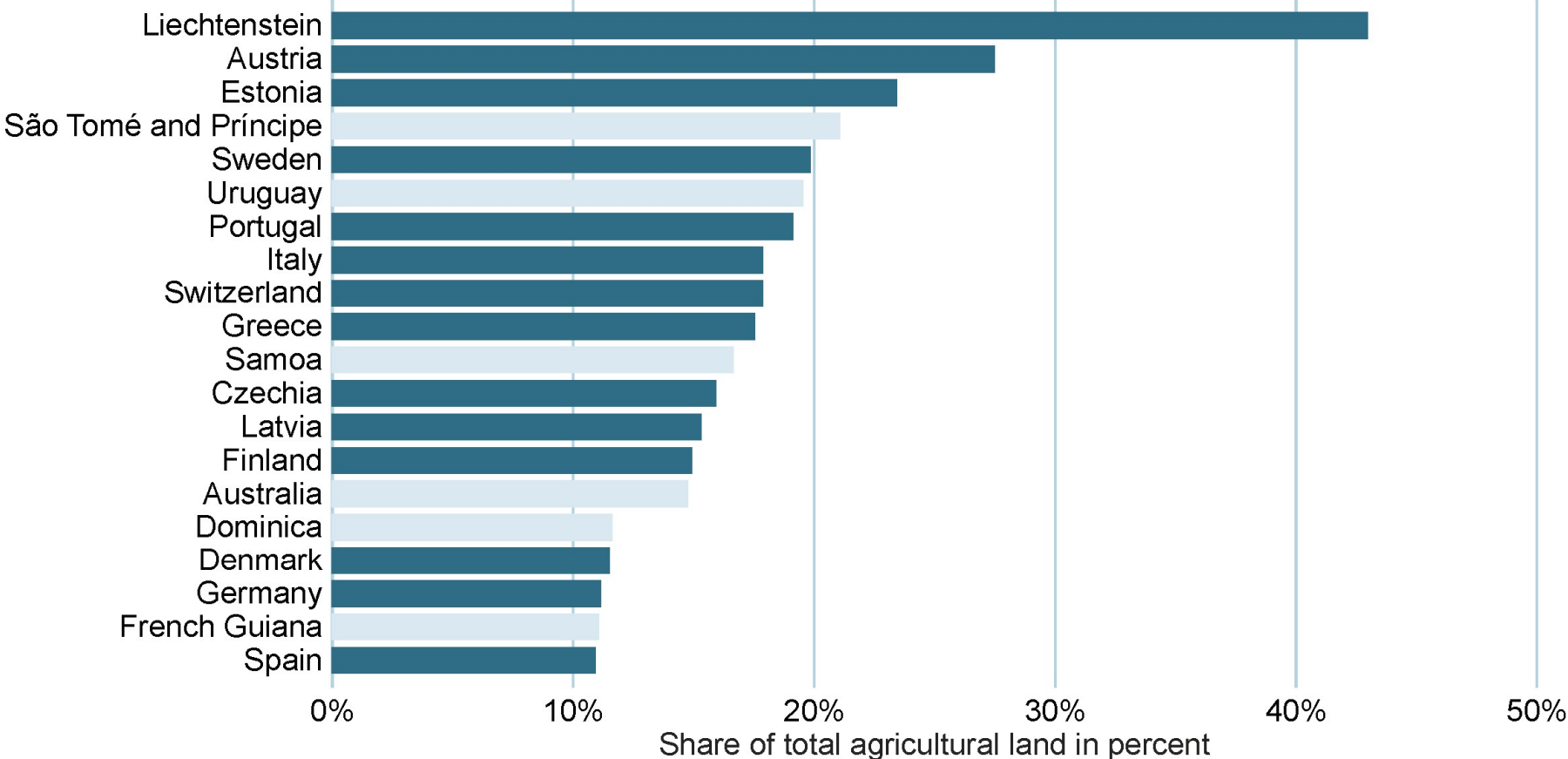
Source: FiBL survey 2024



The 10 countries with the largest areas of organic agricultural land and distribution of organic agricultural land by region in 2022

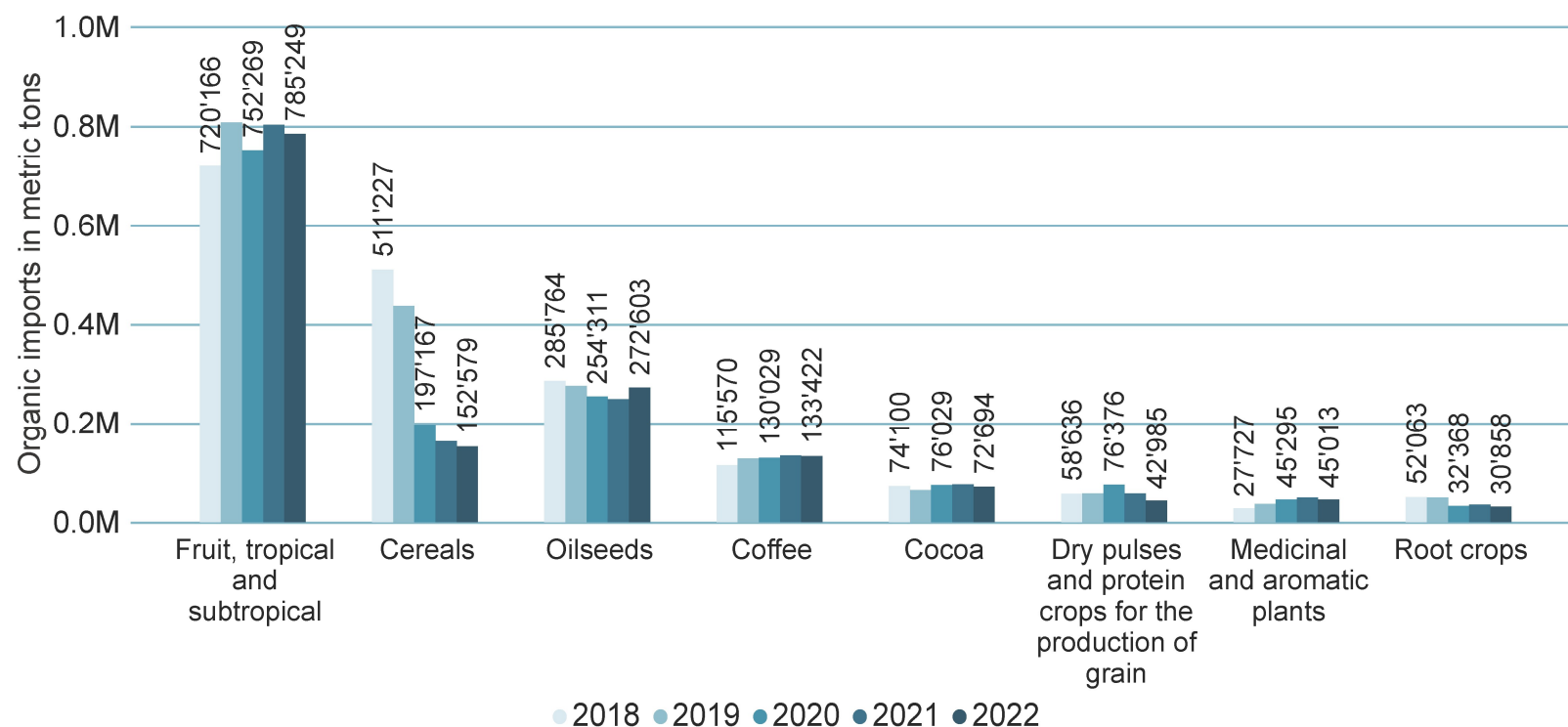
World: Countries with an organic share of the total agricultural land of at least 10 percent

Source: FiBL survey 2024



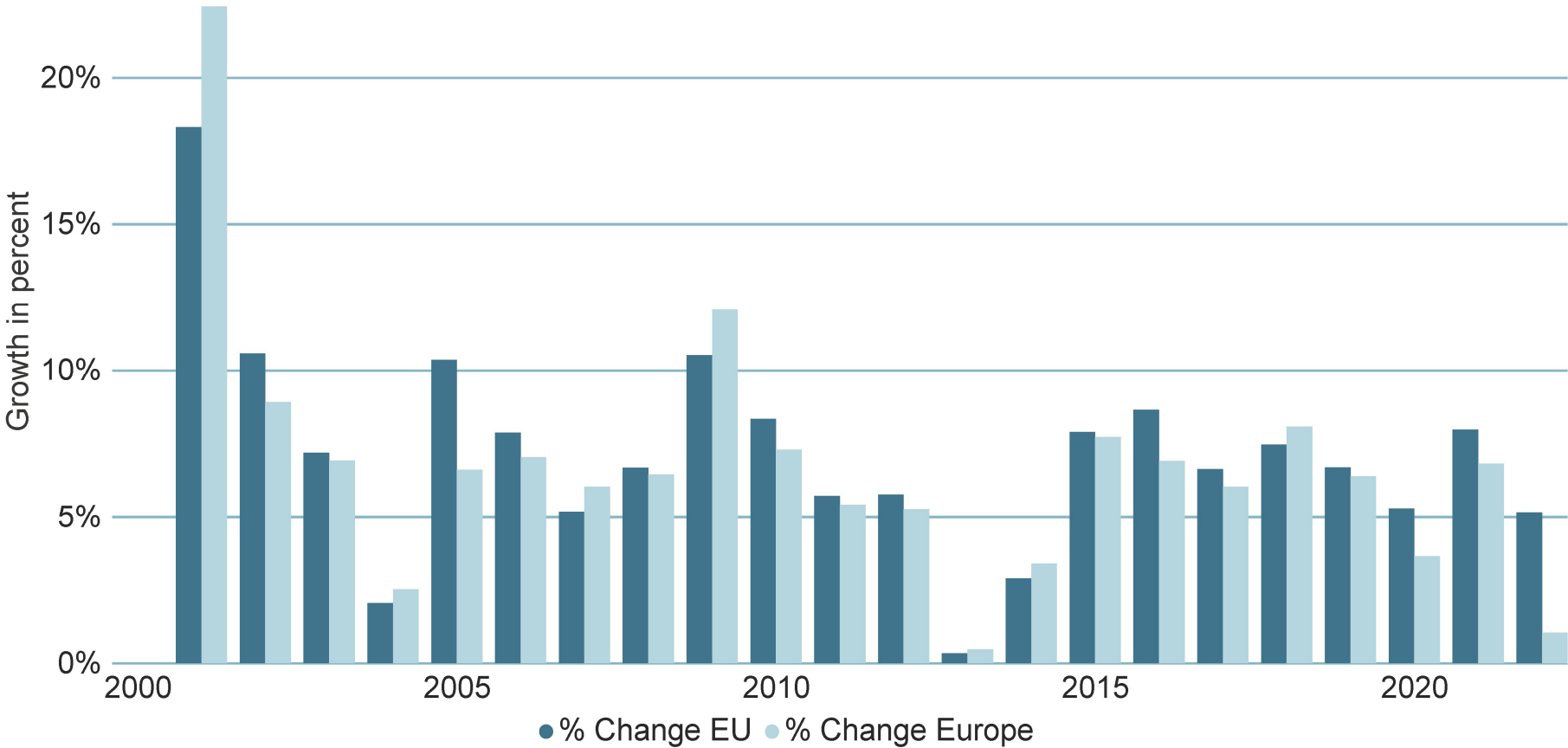
European Union: Organic agri-food imports development of the main arable and permanent crop products 2018 - 2022

Source: Traces/European Commission 2023



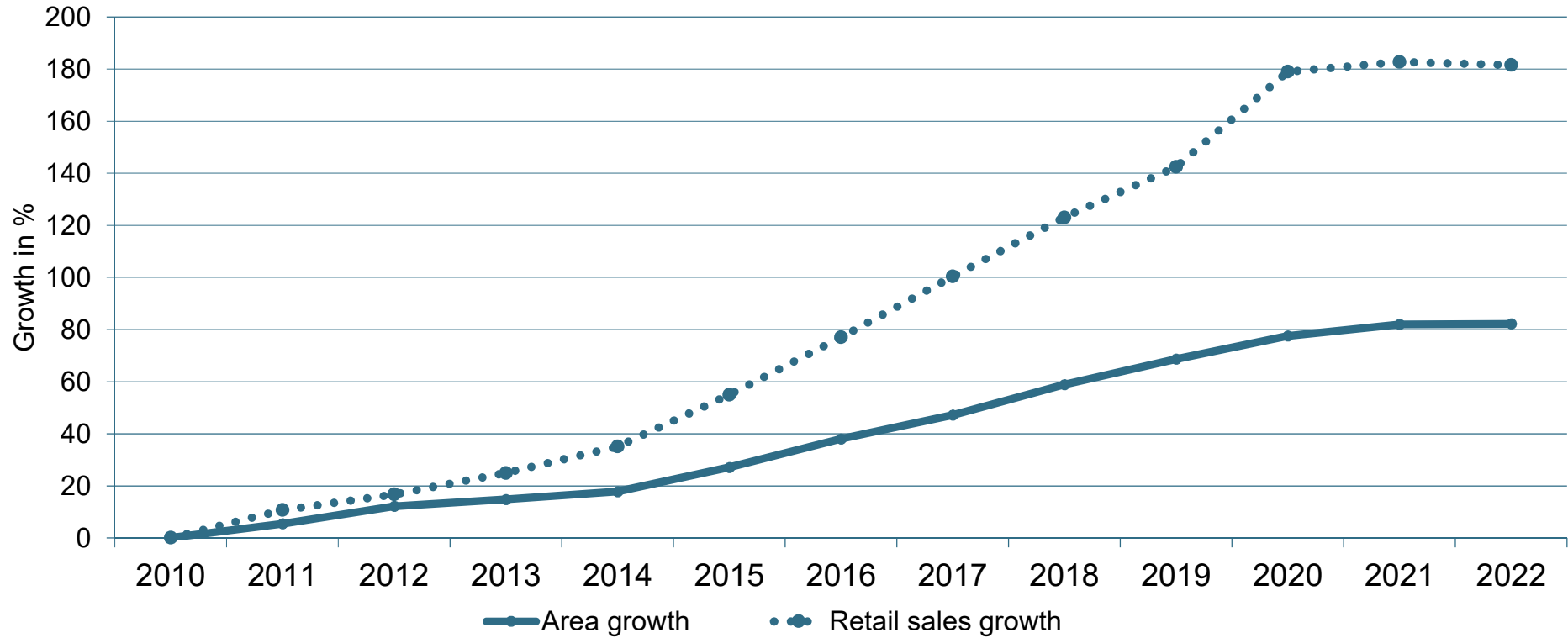
Europe: Growth rates for organic agricultural land in Europe and the European Union 2000 - 2022

Source: FiBL-AMI surveys 2001-2024, based on national data sources and Eurostat



Europe: Growth of organic area and retail sales 2010-2022

Source: FiBL-AMI survey 2024, based on national data sources and Eurostat



Europe: Cumulative growth of organic area and retail sales