Europe and European Union: Key facts and Figures

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In 2023, the development of the organic sector in Europe exhibited various trends in key indicators. While organic farmland, the number of producers and retail sales increased, EU organic imports declined.

Both the organic farmland and the market will need to grow at a faster rate to achieve the 25 percent organic area share goal by 2030, as outlined by the European Commission (2020) in its Farm to Fork strategy for the European Union. (For more information, see chapter by Lampkin et al. on page 213).

1 Key facts and figures: Production and market highlights

More than 19.5 million hectares of farmland were organic in Europe in 2023 – Spain had the largest area

In Europe, 19.5 million hectares were managed organically in 2023, with the EU accounting for 17.7 million hectares. Spain surpassed France to become the leading country in terms of farmland under organic management, with 15.4 percent of Europe's organic farmland, followed by France, Italy, and Germany. These four countries collectively accounted for more than half of the European organic farmland and almost 57 percent of the EU's organic farmland.

European organic farmland increased by almost 0.8 million hectares

Organic farmland increased by 0.8 million hectares in Europe, with a growth rate of 4.1 percent. In the EU, organic farmland grew by 0.6 million hectares, representing a growth rate of 3.6 percent. However, there were significant decreases in France and Russia, with France losing 200'000 hectares. To achieve the EU's goal of having 25 percent organic farmland by 2030, an annual growth rate of 10 percent is required.

Liechtenstein continued to be the country with the highest organic area share in the world

Organic farmland in Europe accounted for 3.9 percent of the total agricultural land, while in the European Union, it constituted 10.9 percent. Liechtenstein maintained its position as the country with the highest organic farmland share globally at 44.6 percent, followed by Austria (27.3 percent), Estonia (22.9 percent), and Portugal (21.7 percent), with Portugal entering the top four for the first time.

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

Arable land accounted for 43 percent of organic farmland in Europe, followed by permanent grassland at 40 percent and permanent crops at 13 percent. Cereals remained the most prominent arable crop, covering 2.8 million hectares in Europe (EU: 2.5 million hectares). Among permanent crops, olives occupied 0.65 million hectares. Oilseeds showed the most significant growth over the past decade, with a 151 percent increase in Europe and 173 percent in the EU. However, changes in Eurostat's reporting system have made it difficult to accurately track the total organic area for crops, as in-conversion areas are no longer included.

More than 490'000 organic producers and almost 95'000 organic processors

There were 494'624 organic producers in Europe in 2023, with 434'577 located in the EU. Italy had the largest number of producers (almost 85'000). The number of producers grew by 1.4 percent in Europe and 1.8 percent in the EU. There were 94'627 organic processors in Europe, representing a 1.5 percent increase compared to 2022, with 89'379 in the EU. Italy again led with the most processors (24'800). The number of importers in Europe grew to 7'955, marking a 3.8 percent increase, while the EU recorded 6'727 importers, up by 3.4 percent. Germany had the highest number of importers (1'974).

Organic imports: Ecuador continued to be the largest supplier, and tropical fruit remained the most important commodity group

In 2023, the EU imported 2.47 million metric tons of organic products, marking a decline of 9.1 percent compared to 2022. Ecuador was the largest supplier, providing 0.36 million metric tons of organic products. Tropical fruits, mainly bananas, remained the most significant import category, accounting for 0.77 million metric tons, or nearly one-third of all imports. The Netherlands was the largest importer in the EU, acting as a re-exporter for other European countries.

Retail sales exceeded 54 billion euros in Europe

Organic retail sales in Europe reached 54.7 billion euros in 2023, with 46.5 billion euros in the EU. Germany remained the largest market in Europe, with sales of 16.1 billion euros, followed by France with 12.1 billion euros. Retail sales grew by 3.0 percent in Europe and 2.9 percent in the EU. From 2014 to 2023, the values of organic retail sales in Europe and the EU more than doubled.

The highest organic market shares and per capita consumption are found in Europe

European countries continued to lead globally in organic food sales as percentages of their food markets. Denmark had the highest market share globally (11.8 percent), followed by Switzerland (11.6 percent) and Austria (11.0 percent). In 2023, European consumers spent an average of 66 euros per capita on organic food (EU: 104 euros). Swiss and Danish consumers topped the list, spending 468 euros and 362 euros per capita, respectively.

For detailed data on organic farming and market development in Europe and the European Union, please refer to the tables provided in the Annex, section 2.3 Organic Agriculture in Europe and the European Union: Tables, page 315.

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 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.

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

In this section, we summarize the area-related data for Europe and the European Union. Graphs and summary tables can be found on the following pages, and tables with country details are available in the annex (page 315).

Organic agricultural land

- In 2023, 19.5 million hectares were farmed organically in Europe and 17.7 million hectares in the European Union (EU).
- The countries with the largest organic farmland areas were Spain (accounting for 15.4 percent of Europe's organic farmland and taking the number one position from the previous leader, France), followed by France, Italy, and Germany. These four countries collectively accounted for more than half of Europe's organic farmland and almost 60 percent of the EU's organic farmland.
- Europe held almost one-fifth of the world's organic farmland, representing 19.7 percent of the global total.

Organic shares of total agricultural land

- In Europe, 3.9 percent of agricultural land was organic in 2023, while in the EU, it reached 10.9 percent.
- In 16 countries (14 in the EU), 10 percent or more of agricultural land was managed organically.
- The countries with the highest organic area shares were Liechtenstein (44.6 percent), Austria (27.3 percent), Estonia (22.9 percent), and Portugal (21.7 percent), the latter making it to the top four for the first time. Liechtenstein continued to have the highest organic farmland share in the world.
- **Growth of organic agricultural land**
- In 2023, the organic agricultural land in Europe increased by 0.8 million hectares (EU: 0.6 million hectares), representing a growth rate of 4.1 percent (EU: 3.6 percent).
- The countries that contributed the most to this growth were Spain, Ukraine, Portugal and Italy, collectively adding more than 700'000 hectares. Conversely, there was a significant decrease in France and Russia, with a reduction of 200'000 hectares.
- The highest relative increases were observed in Ireland, Ukraine and Moldova, while the highest relative decreases occurred in Russia (-48.8 percent) and Kosovo (-25.4 percent).

Conversion status of organic farmland

- In Europe, of the 19.5 million hectares of organic agricultural land, at least 13.1 million hectares were fully converted (11.8 million out of 17.7 million hectares were fully converted in the EU).

Table 21: Europe: Organic agricultural land in Europe and the European Union 2023

	Organic area [million ha]	Organic share [%]	Change 2022-2023 [%]	Change 2022-2023 [million ha]	Change 2014-2023 [%]	Change 2014-2023 [million ha]
European Union	17.7	10.9%	3.6%	+0.6	79.9%	7.9
Europe	19.5	3.9%	4.1%	+0.8	65.5%	7.7

Source: FiBL-AMI survey 2025 based on Eurostat and national data sources

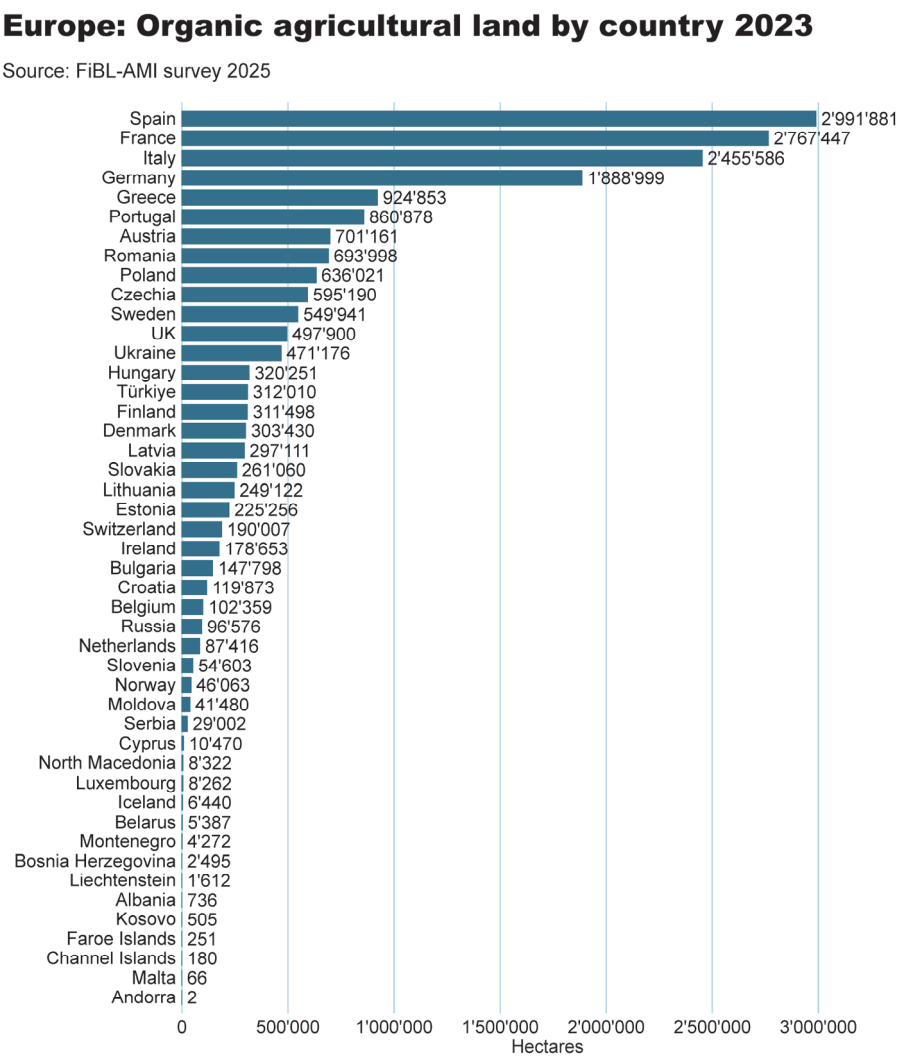


Figure 71: Europe: Organic agricultural land by country 2023

Source: FiBL-AMI survey 2025 based on Eurostat and national data sources.
For detailed data sources. For detailed data sources, see annex, page 333.

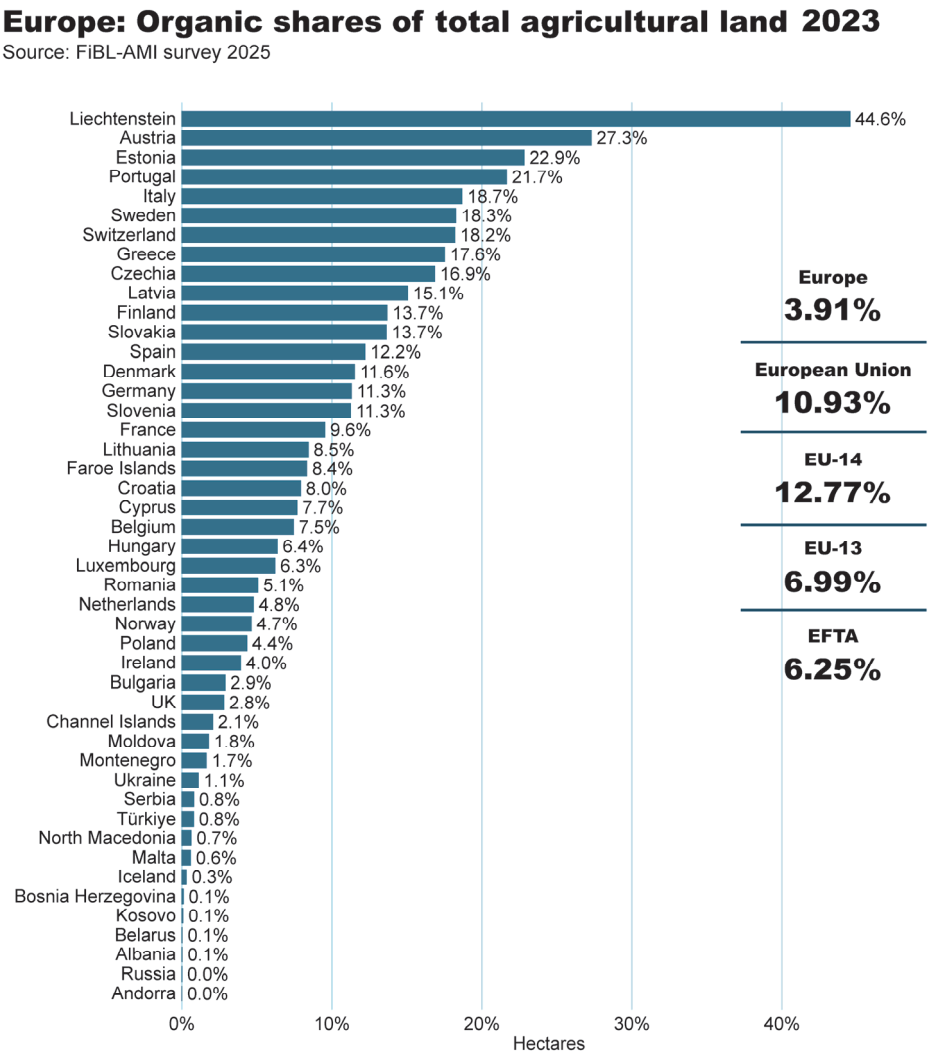
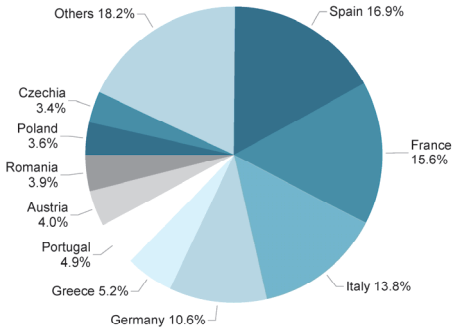


Figure 72: Europe: Organic shares of total agricultural land 2023

Source: FiBL-AMI survey 2025 based on national data sources and Eurostat. For detailed data sources, see annex, page 333.

The European Union has 27 Member States. It consists of the EU-13 countries, which became members of the European Union in or after May 2004, and the EU-14 countries, which were members of the European Union prior to the accession of ten candidate countries on May 1, 2004. EFTA refers to the European Free Trade Association, which includes Iceland, Norway, Liechtenstein, and Switzerland.

European Union: Distribution of organic farmland by country 2023
Source: FiBL-AMI survey 2025



Europe: Distribution of organic farmland by country 2023
Source: FiBL-AMI survey 2025

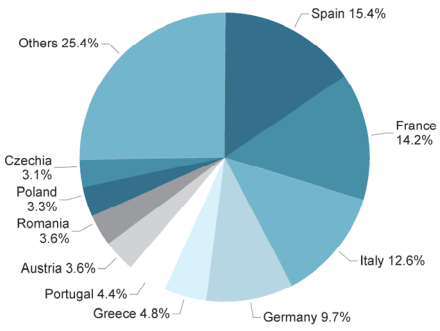


Figure 73: Europe and European Union: Distribution of organic farmland by country 2023

Source: FiBL-AMI survey 2025 based on national data sources and Eurostat
For detailed data sources, see annex, page 333.

Europe and the European Union: Development of organic agricultural land 2000 - 2023
Source: FiBL-AMI surveys 2001-2025, based on the national data sources and Eurostat

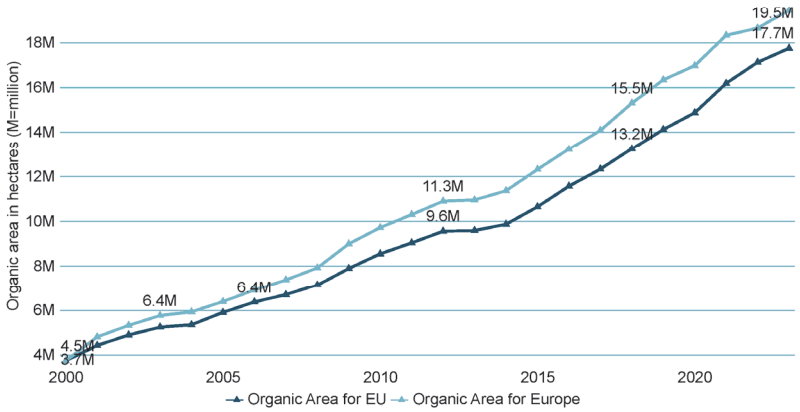


Figure 74: Europe and the European Union: Development of organic agricultural land 2000-2023

Source: FiBL-AMI Surveys 2006-2025 based on national data sources and Eurostat. The data for the European Union covers those countries that were members of the European Union in 2023

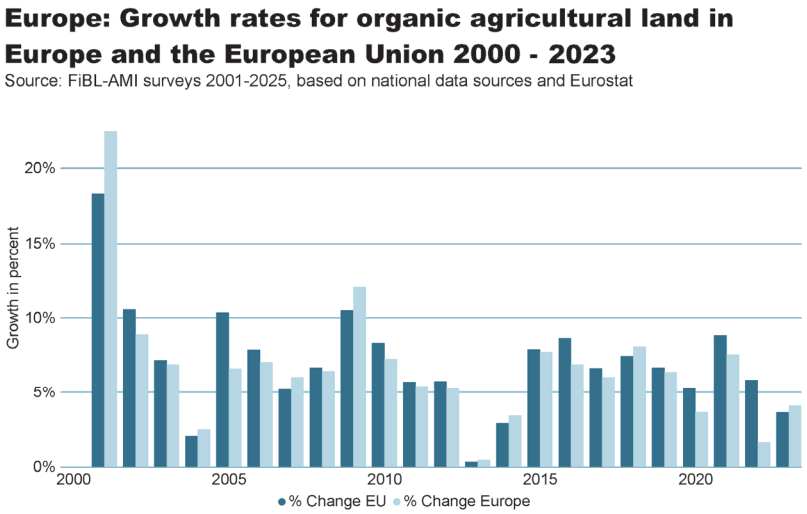


Figure 75: Europe: Growth rates for organic agricultural land in Europe and the European Union 2000-2023

Source: FiBL-AMI Surveys 2002-2025 based on national data sources and Eurostat

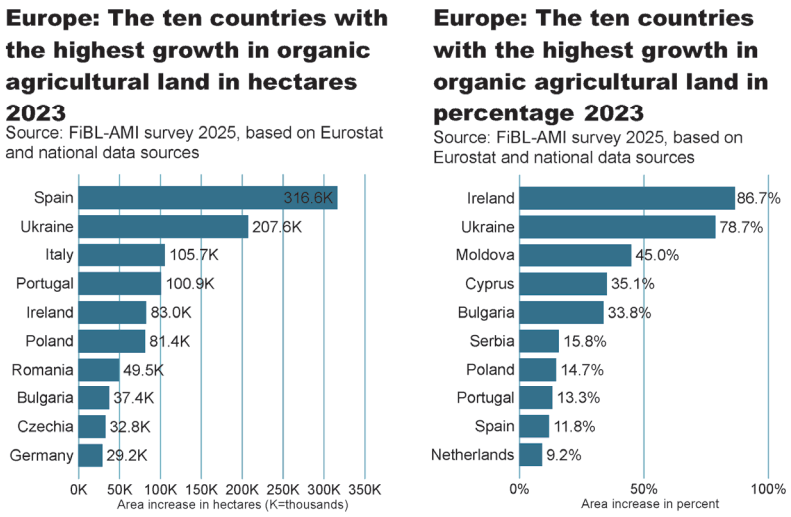


Figure 76: Europe: The ten countries with the highest growth in organic agricultural land in hectares and relative growth in 2023

Source: FiBL-AMI survey 2025 5based on national data sources and Eurostat
For detailed data sources, see annex, page 333.

3 Land use and crops grown in organic agriculture

Land use[1]

For all countries in Europe, information on land use and crop details is available. The area dedicated to all land use types has shown growth in most countries since 2000. In 2022, there was a decrease in organic arable land in Europe (mainly due to losses in Russia and Ukraine), while in 2023 stagnation was noted. The stagnation in 2023 can partly be attributed to the lack of updated data on land use and crops for all European countries in 2023. Additionally, Eurostat, the main source for land use and crop data, changed its reporting system, which no longer includes the in-conversion area for crops. See the box below.

Box 1: Explanation of data discrepancies in European organic crop area reporting

From 2021 onwards, Eurostat, the statistical office of the European Union, revised its reporting methodology for organic farming data.[2] Up until 2020, Eurostat provided data on the total organic area, the fully converted organic area and the area in conversion for all crop groups and individual crop types. However, starting in 2021, Eurostat only reported the fully converted organic area, leaving a gap in the availability of data on areas in conversion. As a result, the total organic area for crops, such as cereals, vegetables, oilseeds, and others, was not available any longer at the European or Member State level.

To address this gap, in 2021 and 2022, FiBL attempted to estimate the missing data using available sources and historical trends. However, this proved to be both time-consuming and prone to inaccuracies. Consequently, in 2023, we decided to report only the fully converted organic areas as provided by Eurostat. This methodological adjustment has led to a significant apparent decrease in organic crop areas, as areas in conversion are no longer included.

It is important to note that some countries, such as Spain, continue to report both fully converted and in-conversion areas through their respective ministries, which allows for a more complete dataset in these cases. Other countries, including Germany and Austria, historically did not differentiate between these two categories, maintaining continuity in their data.

[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] The Eurostat data collection covers the member states of the European Union, the EU's candidate countries as well as the countries of the European Trade Association EFTA.

Table 22: Europe and the European Union: Land use 2023

Crop group	Europe [Million hectares] (Share of total)	European Union [Million hectares] (Share of total)	Change 2022-2023 Europe/EU [%]	Change 2014-2023 Europe/EU [%]
Arable land	8.4 (3.8%)	7.7 (7.7%)	-0.1%/+-0.1%	+57.7%/+80.3%
Permanent grassland	7.8 (4.5%)	7.4 (14.5%)	+4.4%/+5.1%	+59.4%/+69.5%
Permanent crops	2.5 (14.1%)	2.3 (18.8%)	+4.6%+/6.0%	+80.9%/+83.9%
Total	**19.5 (3.9%)**	**17.7 (10.9%)**	**4.1%/+3.6%**	**+65.5%/+79.9%**

Source: FiBL-AMI survey 2025 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 type

- **Arable land** constitutes a large part of organic farmland, with 8.4 million hectares in Europe and 7.7 million hectares in the EU. Less arable land was reported; partly due to changes in the Eurostat reporting system (see Box 1, page 183).
- **Permanent grassland** accounted for 7.8 million hectares in Europe and 7.4 million hectares in the EU.
- **Permanent crops** constituted 14.1 percent of the total permanent cropland in Europe and 18.8 percent in the European Union, with 2.5 and 2.3 million hectares, respectively.
- For more information including breakdown by country, see Table 22, Figure 78, Figure 79, Figure 80.

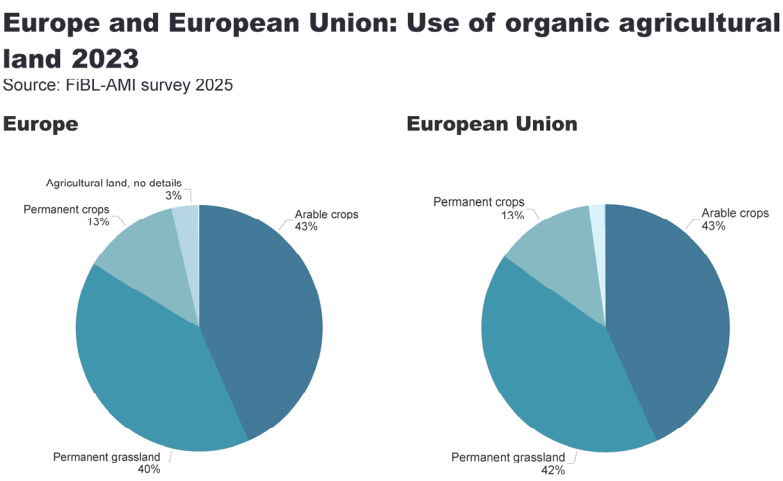


Figure 77: Europe and European Union: Distribution of land use in organic agriculture 2023

Source: FiBL-AMI survey 2025 based on Eurostat and national data sources

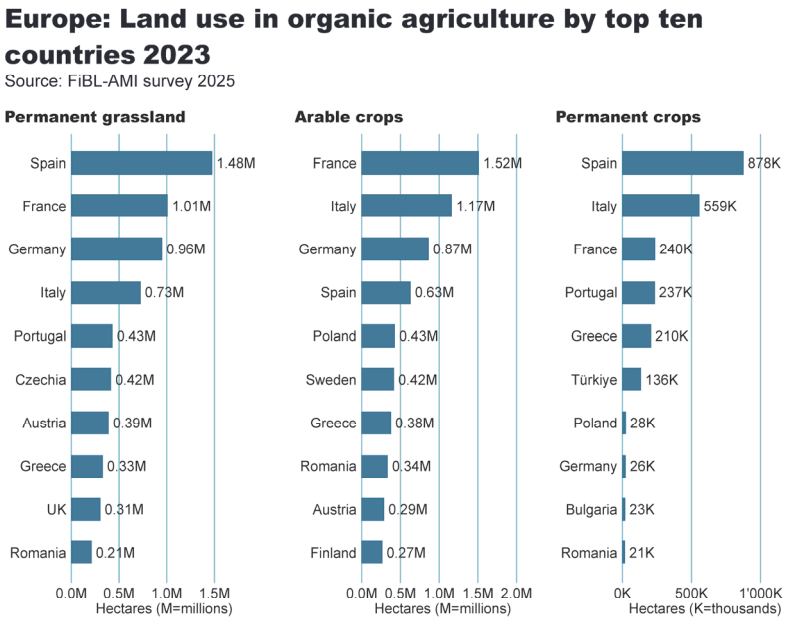


Figure 78: Europe: Land use in organic agriculture - top 10 countries 2023

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

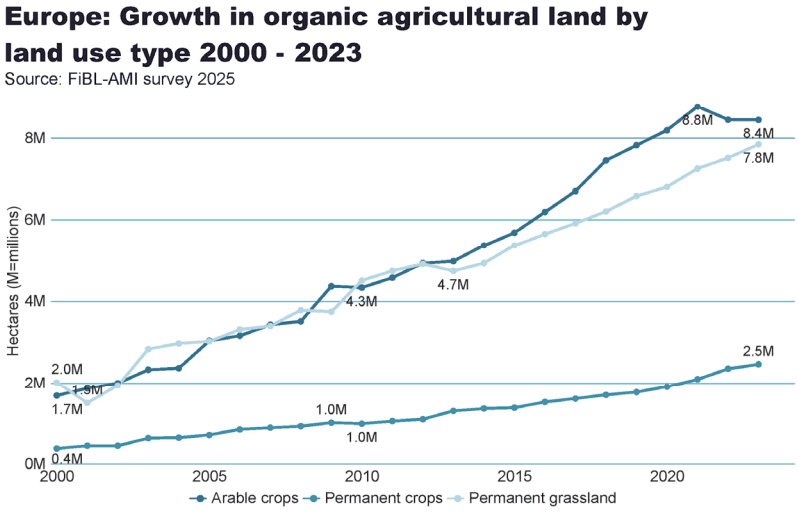


Figure 79: Europe: Growth in organic agricultural land by land use type 2000-2023

Source: FiBL-AMI Surveys 2006-2025 based on national data sources and Eurostat

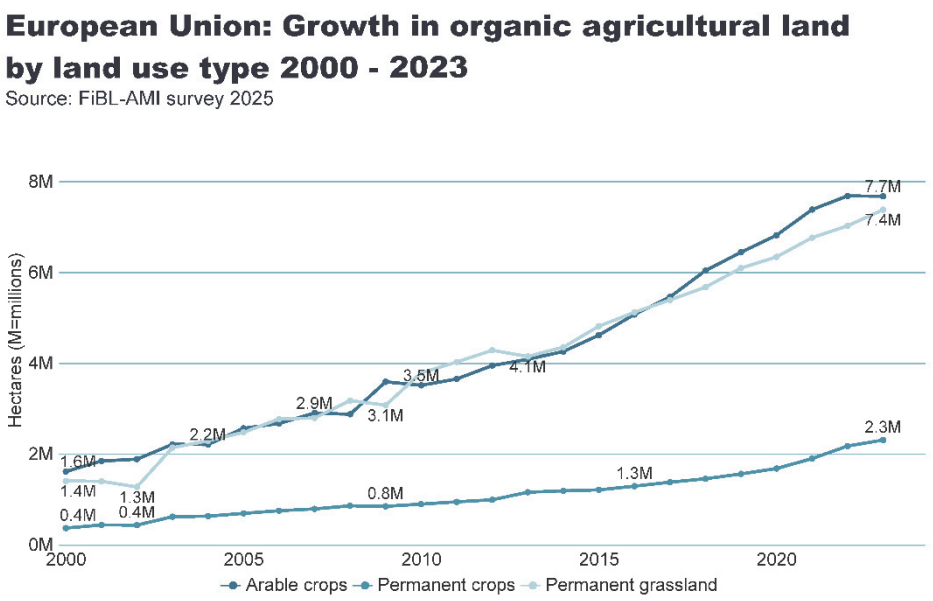


Figure 80: European Union: Growth in organic agricultural land by land use type 2000-2023

Source: FiBL-AMI Surveys 2006-2025 based on national data sources and Eurostat

Crops grown in organic agriculture

In 2023, for many key crops, a smaller area was reported compared to previous years. As explained in Box 1 (page 183), reporting from Eurostat now excludes in-conversion areas for crops. Consequently, most crops show a decrease in reported areas.

Exceptions include dry pulses, which showed growth despite the different reporting method, as well as vegetables (Table 23). The primary arable crop group was cereals, covering 2.8 million hectares in Europe (EU: 2.5 million hectares). Meanwhile, the permanent crop with the largest organic area was olives, occupying 0.65 million hectares. The most significant growth in the ten year period from 2014 to 2023 was observed in oilseeds, with a 173 percent increase in the EU and 151 percent in Europe.

The highest area share, exceeding 25.2 percent in the EU, was attributed to dry pulses (Table 23).

Table 23: Europe and the European Union: Key crops/crop group 2023

	Crop group	Area (ha)		Organic share (%)		Change 2022-2023 (%)		Change 2014-2023 (%)	
		Europe	EU	Europe	EU	Europe	EU	Europe	EU
Arable crops	Cereals	2'806'551	2'459'130	2.2	4.7	-3.9	-5.7	47.2	66.4
	Dry pulses	549'629	524'158	9.0	25.2	4.4	4.9	71.6	92.3
	Fresh vegetables	233'459	208'555	5.7	10.4	1.3	-2.6	100.0	114.1
	Green fodder	2'595'292	2'423'763	11.7	11.9	-5.7	-6.8	26.8	39.4
	Oilseeds	618'430	461'204	1.6	4.2	-11.3	-6.2	151.8	173.6
	Root crops	56'785	51'858	0.7	1.7	-6.5	-11.6	37.2	76.6
Permanent crops	Berries*	39'408	36'231	12.5	24.2	-5.3	-5.3	23.4	25.6
	Citrus fruit	56'431	55'814	8.1	10.7	-7.8	-7.8	44.2	44.4
	Fruit, temperate	134'345	117'965	4.9	9.8	-10.6	-10.5	6.1	11.7
	Fruit, (sub)tropical	41'571	23'658	16.0	14.1	-9.8	-7.1	31.5	180.1
	Grapes	456'958	446'395	11.9	14.1	-6.9	-6.7	71.6	77.5
	Nuts*	455'786	416'893	15.9	30.3	-0.2	1.6	151.5	169.7
	Olives	647'880	601'210	10.7	11.8	-1.4	0.1	31.7	44.5

Source: FiBL-AMI survey 2025 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 tables in this book (page 291) and statistics.fibl.org. * For berries and nuts the total areas provided by Eurostat or FAO are not directly comparable with the organic areas.*

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: 7.1 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 75, page 319.

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 group over the years.

Table 24: Europe and European Union: Organic operators 2023

	Europe			European Union		
	No.	Change 1 year	Change 10 years	No.	Change 1 year	Change 10 years
Producers	494'624	1.4%	46.6%	434'577	1.8%	71.9%
Processors	94'627	1.5%	82.2%	89'379	2.2%	86.6%
Importers	7'955	3.8%	137.7%	6'727	3.4%	119.5%
Exporters	5'524	10.5%	N/A	4'898	14.0%	N/A

Source: FiBL-AMI survey 2025 based on national data sources and Eurostat. For a breakdown by country, see. annex.

Organic producers

- In 2023, there were almost half a million organic producers in Europe, with more than 430´000 in the EU. The country with the largest number of producers was Italy, with almost 85'000.
- Modest growth was observed in the EU (+1.8 percent) and Europe as a whole (+1.4 percent). The number of producers grew at a slower pace than organic farmland. Over the decade from 2014 to 2023, the number of producers in Europe increased by 47 percent (EU: 72 percent). Slightly more than 10 percent of the world's organic farmers are located in Europe.

Organic processors and importers

- In 2023, there were about 95'000 organic processors in Europe, representing a 1.5 percent increase compared to the previous year and an 82 percent increase over the last decade. In the European Union, the number of processors was around 89,000, with a 2.2 percent increase over one year and an 87 percent growth over ten years. Italy continued to have the largest number of processors (24'800).
- The number of importers in Europe increased to about 8,000 in 2023, marking a 3.8 percent rise compared to 2022 and a significant 138 percent increase over the past decade. In the European Union, there were approximately 6,700 importers, up 3.4 percent from the previous year and 120 percent over ten years. Germany had the highest number of importers, totalling 1'974.

For more information see Table 24, Figure 82, Figure 83.

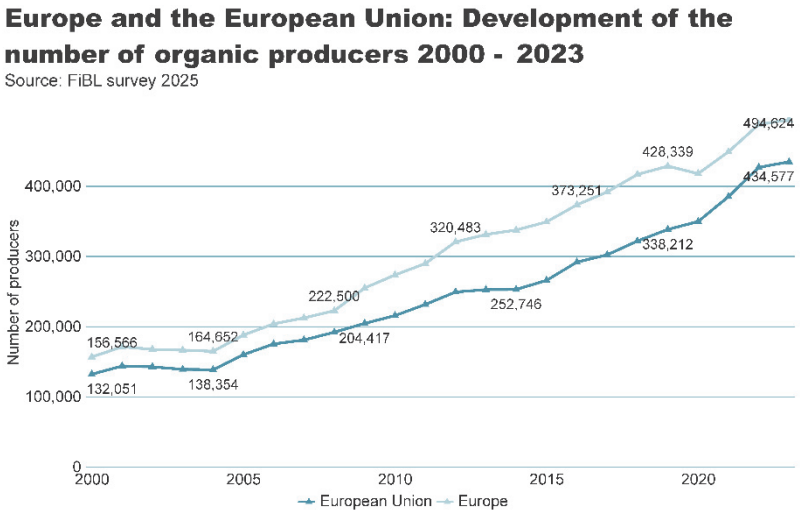


Figure 81: Europe and the European Union: Development of the number of organic producers 2000-2023

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

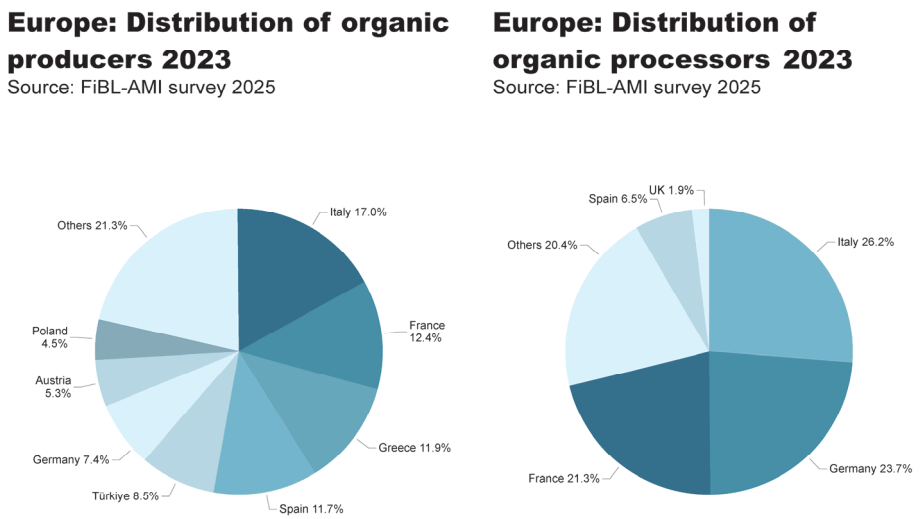


Figure 82: Europe: Distribution of organic producers and processors by country 2023

Source: FiBL-AMI survey 2025, based on national data sources and Eurostat

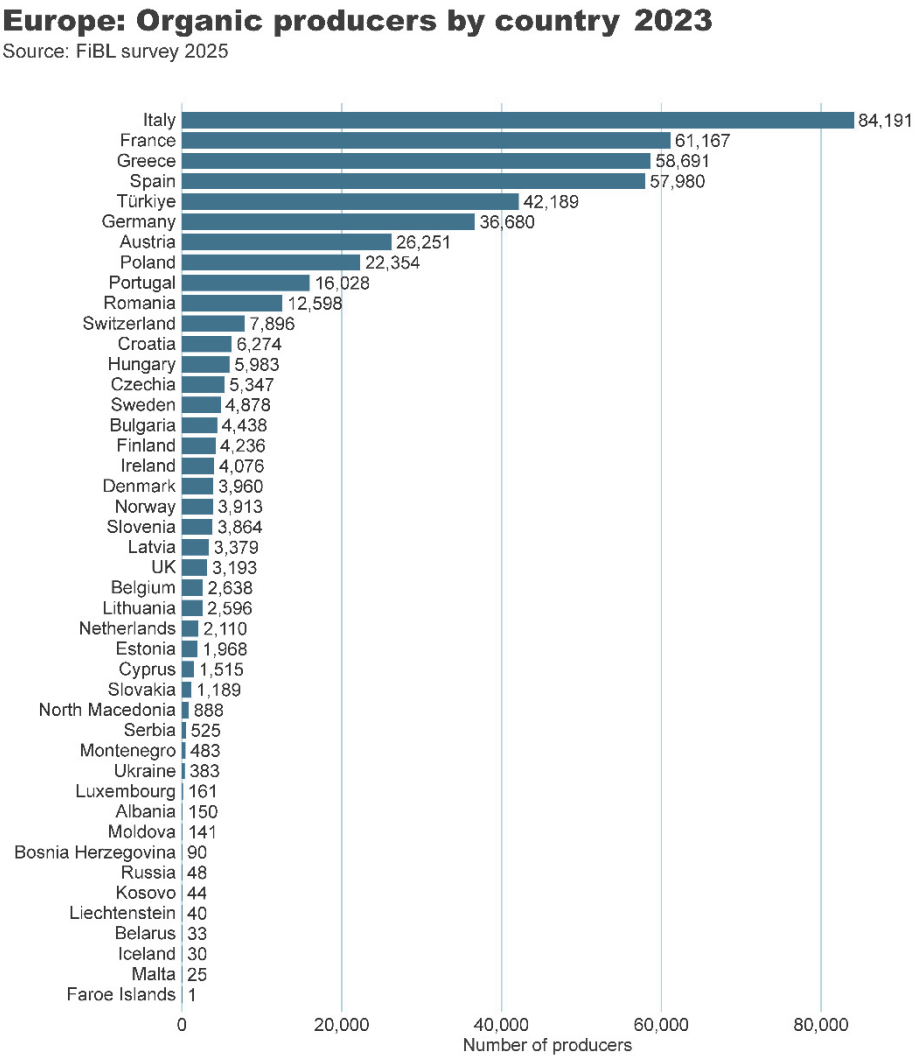


Figure 83: Europe: Number of organic producers by country 2023

Source: FiBL-AMI survey 2025 based on national data sources and Eurostat. For detailed data sources, see annex, page 333.

5 Organic imports and exports

The European Union, representing the second-largest organic single market, has shared data on its organic imports. This marks the fifth instance of them providing information on key import products and the primary importing countries, based on volume in metric tons (MT). For further details, including figures, please refer to the European Commission's contribution on EU organic imports (page202).

Additionally, the United States offers both export and import data, including volume and value, although this information does not cover all commodities.

Some European countries also provide export and import values. However, since the latter dataset is incomplete, drawing conclusions regarding total values and growth rates for Europe or the European Union becomes challenging (see page 322, **Table 78**).

- **EU organic import volume**: In 2023, the EU imported a total of 2.47 million metric tons of organic agri-food products. Compared to 2022, EU organic imports declined by 9.1 percent.
- **EU organic import volume by importing country**: In 2023, the largest importers (based on import volume in metric tons) were the Netherlands (795'383 metric tons), followed by Germany and Belgium. It's important to note that a significant portion of Dutch imports is resold to other EU countries.
- **EU organic import volume by exporting country**: Ecuador was the largest supplier of organic agri-food products to the EU, providing 0.36 million metric tons, which corresponds to almost 15 percent of the total organic import volume. An increase (+67 percent) in imports of wheat was recorded in 2023, with most imports coming from Türkiye and Ukraine.
- **EU organic import volume by product group**: Tropical fruit was the most important product group, accounting for 0.77 million metric tons (almost one-third of all EU organic imports, primarily bananas), followed by oil cakes and soybeans.
- **European export volumes to the US**: According to US data, European countries exported a volume of at least 0.29 million metric tons to the United States, constituting 10 percent of all US organic imports of 2'764'150 metric tons. Approximately 110'000 metric tons came from Turkey, followed by Russia and Romania, all of which increased their export volumes considerably. Please note that the US organic import statistics covers only selected products/product groups and is therefore not complete.
- **European export and import value**: Limited data is available on this. Italy showed the largest export value (3.6 billion euros), and France had the highest import value (2.8 billion euros in 2021). Unfortunately, no such data was available from Germany, the largest market in Europe, or other countries (Table 78, page322).

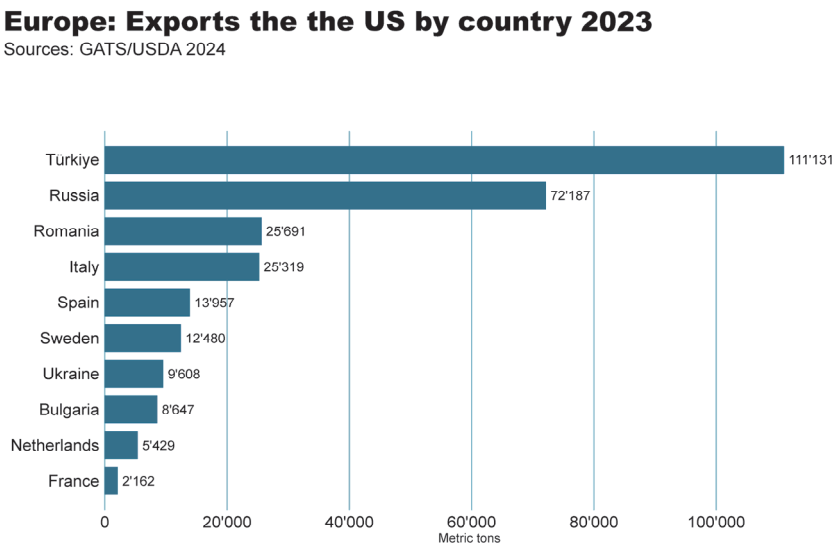


Figure 84: European organic exports to the US: Top 10 European exporters 2023

Source: GATS/USDA

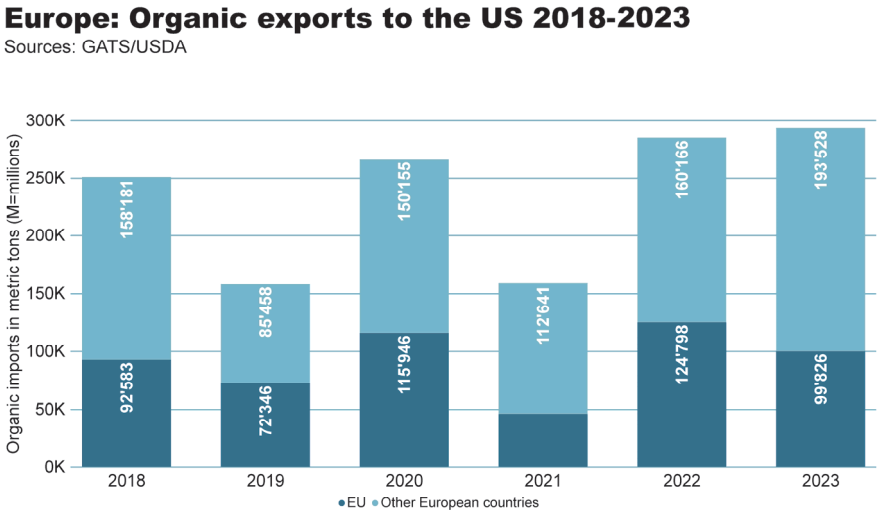


Figure 85: European organic exports to the US: Development 2018-2023

Source: GATS/USDA.

6 Organic retail sales

In 2023, organic retail sales in Europe amounted to 54.7 billion euros, including 46.5 billion euros in the European Union, reflecting a growth of 3.0 percent in Europe and 2.9 percent in the EU. The market had contracted in 2022 due to challenges such as the war in Ukraine, soaring energy prices, and rising living costs, which fuelled inflation across many countries. However, 2023 marked a recovery, signalling renewed consumer confidence and demand for organic products.

Unfortunately, not all countries provide data on their domestic markets regularly, and it may be assumed that the market is larger than indicated in this volume.

Figures on the organic retail sales can be found on the following pages; tables are in the annex.

Table 25: Europe and the European Union: Organic retail sales 2023: Key data

	Retail sales [Million €]	Per capita consumption [€]	Growth 2022-2023 [%]	Growth 2014-2024 [%]
Europe	54'748.6	66	3.0%	+109.0%
European Union	46'486.9	104	2.9%	+114.2%

Source: FiBL-AMI survey 2025 based on national data sources. For detailed data sources, see annex, page 333. Please note that the EU number is not always comparable to what was communicated in previous years as data revisions are carried out.

Size of the organic market

Germany remained the largest market in Europe, with a total of 16.1 billion euros, making it the second-largest organic market in the world, following the United States. France held the second position in Europe with 12.1 billion euros in organic retail sales.

When comparing organic markets on a global scale, the United States took the lead. It accounted for 43 percent of global organic retail sales, totalling 58.6 billion euros, followed by the European Union at 46.5 billion euros, representing 34 percent of the global organic market. It's worth noting that the EU's share of the global market decreased compared to previous years, due to the fact that the market grew slower in the EU than in the US and partly due to the strengthening of the US dollar against the euro.

In terms of retail sales by region, Europe accounted for 40.1 percent (54.7 billion euros), while North America constituted 46.8 percent (63.9 billion euros). Once again, it's important to consider the fluctuating euro – US dollar exchange rate when comparing data over different years.

Organic retail sales 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 (11.8 percent, the highest organic market share in the world), Switzerland (11.6 percent) Austria (11.0 percent). Organic market shares decreased in many countries in 2023 due to high inflation rates and a sharp rise in food prices across the entire food market.

Market shares of individual products and product groups can be far higher; these data are provided in the table at the end of this chapter. Some newer products, such as meat and milk alternatives, have achieved market shares of more than half of the entire food market.

Growth of the organic market

In 2023, organic retail sales in Europe reached 54.7 billion euros (46.5 billion euros in the EU), marking an increase of 3.0 percent in Europe and 2.9 percent in the European Union. While the market contracted in some countries, in other countries, such as Estonia (+13.0 percent), the Netherlands (+12.5 percent), and Austria (+6.5 percent), retail sales increased in 2023.

From 2014 to 2023, the values of Europe's and the EU's organic retail sales more than doubled.

Per capita consumption of organic food

As in previous years, Switzerland (468 euros) and Denmark (362 euros) continued to lead Europe—and the world—in per capita consumption of organic food. In 2023, seven countries achieved per capita consumption exceeding 100 euros, reflecting steady consumer interest in organic products. On average, per capita consumption in Europe stood at 66 euros, while in the EU it reached 104 euros.

Comparison of organic products and product groups with the total market

While the organic share of the total market is an important indicator, it's also crucial to consider the organic market shares that individual products can achieve. In many countries, organic eggs stand out as a success story within the overall retail market, often reaching impressive proportions of the entire egg market. For example, in Denmark and Switzerland, organic eggs have captured more than 30 percent of the market share in terms of value. When looking at product groups, vegetables and fruits consistently attain the highest market shares, with more than 10 percent in many countries (Table 26).

Marketing channels in organic agriculture

Some countries can break down their retail sales data by marketing channel. Catering sales/food service are a separate category and not included in the retail sales data.

Figure 22 shows that the importance of various retail marketing channels (excluding food service/catering) varies from country to country. The strongest growth in the 2018-2023 period was observed in general retailers (including discounters). However, retail sales also decreased for general retailers in some countries, while discounters increased in most cases (where data is available). Natural food stores play an important role in France, Italy and Germany.

Food service

A notable trend is the significantly stronger growth of organic catering sales compared to retail sales in several countries during 2023, a pattern already observed in 2022. In Denmark, organic catering sales grew by 12 percent from 2022 to 2023, far outpacing the 0.4 percent decrease in retail sales during the same period. Although data on organic

catering and food service sales remain limited in many countries, the trend seen in Denmark reflects a broader pattern observed in other countries as well (Figure 94).

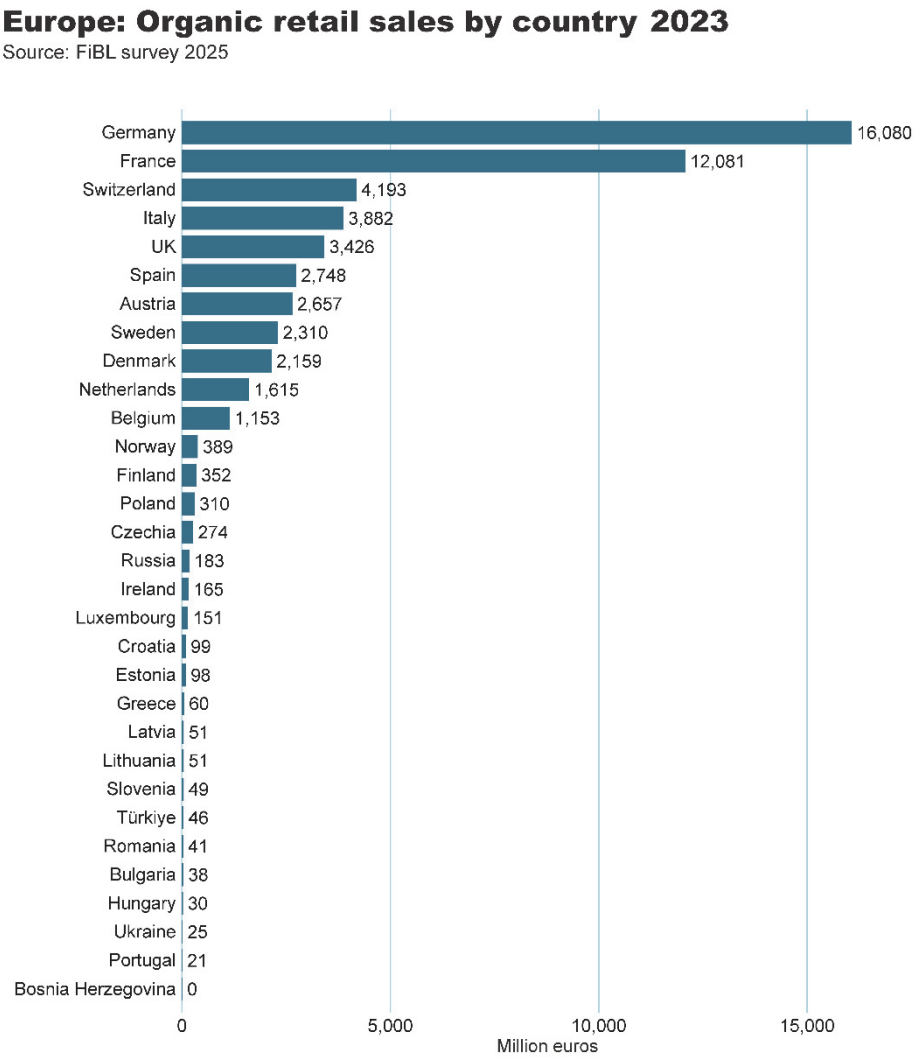
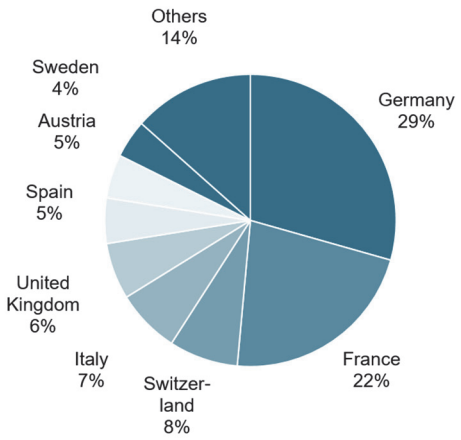


Figure 86: Europe: Retail sales by country 2023

Source: FiBL-AMI survey 2025 based on national data sources. Please note that updated data were not available for all countries. For detailed data sources, see annex, page 333.

Europe: Distribution of retail sales value by country 2023
Source: FiBL-AMI survey 2025



World: Distribution of retail sales value by single market 2023
Source: FiBL-AMI survey 2025

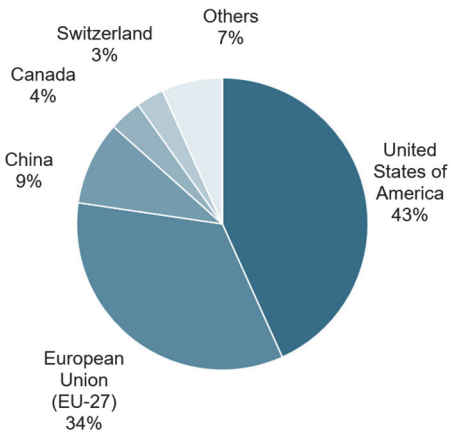


Figure 87: Europe: Distribution of retail sales by country and by single market worldwide 2023

Source: FiBL-AMI survey 2025 based on national data sources

Europe: The countries with the highest shares of the total retail sales 2021 and 2023
Source: FiBL-AMI survey 2025

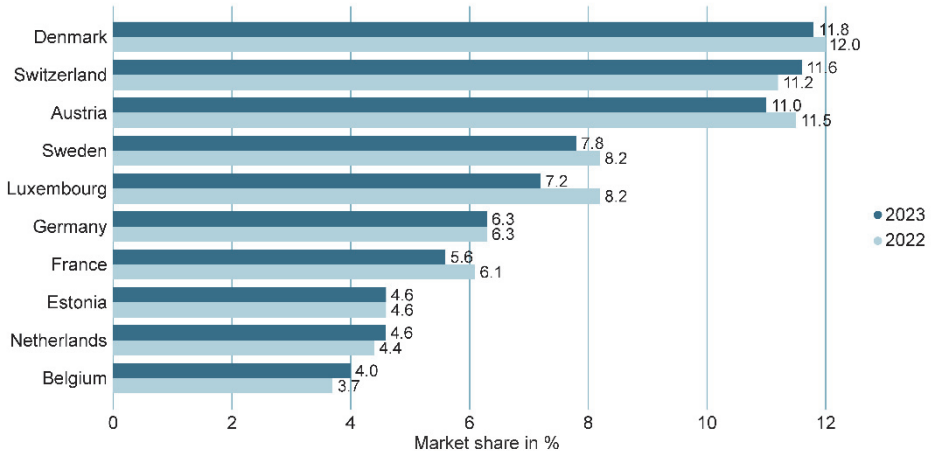


Figure 88: Europe: The countries with the highest shares of total retail sales 2022 and 2023

Source: FiBL-AMI survey 2025 based on national data sources. For detailed data sources, see annex, page 333.

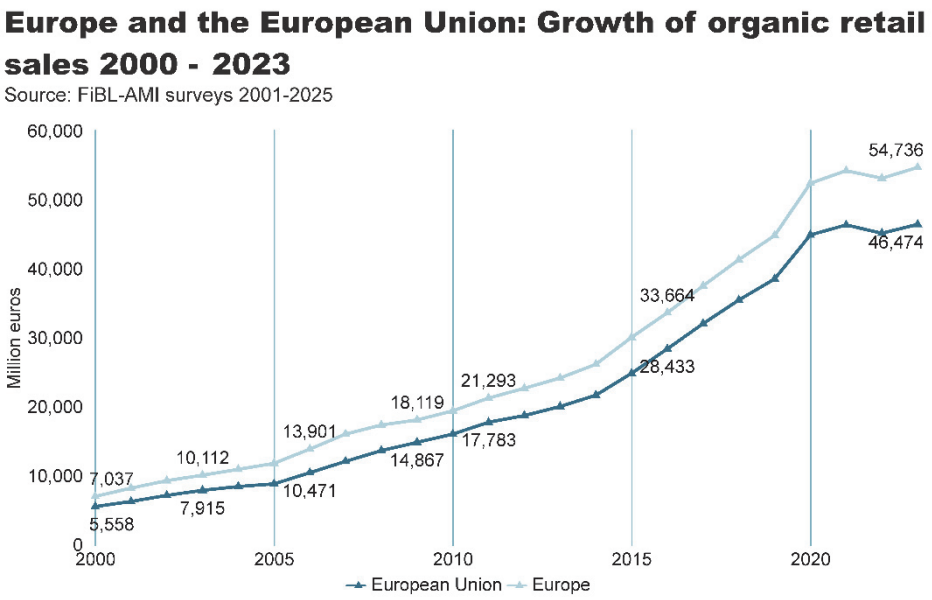


Figure 89: Growth of organic retail sales in Europe and the European Union, 2000-2023

Source: FiBL-AMI surveys 2004-2025, and OrganicDataNetwork Surveys 2013-2015

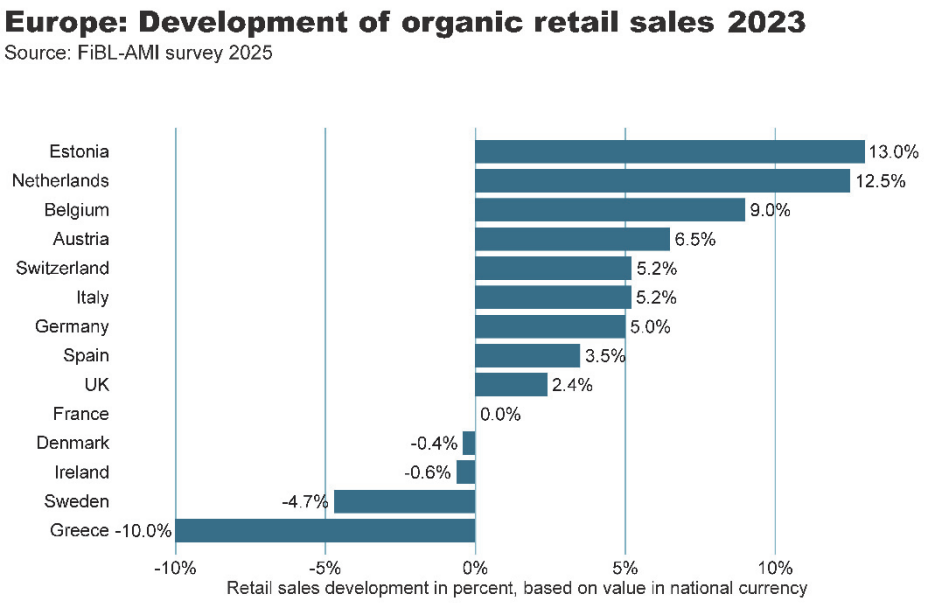


Figure 90: Europe: Organic retail sales development in select countries 2023

Source: FiBL-AMI survey 2025. For detailed data sources, see annex, page 333.

Europe: The countries with the highest per capita consumption 2023

Source: FiBL-AMI survey 2025

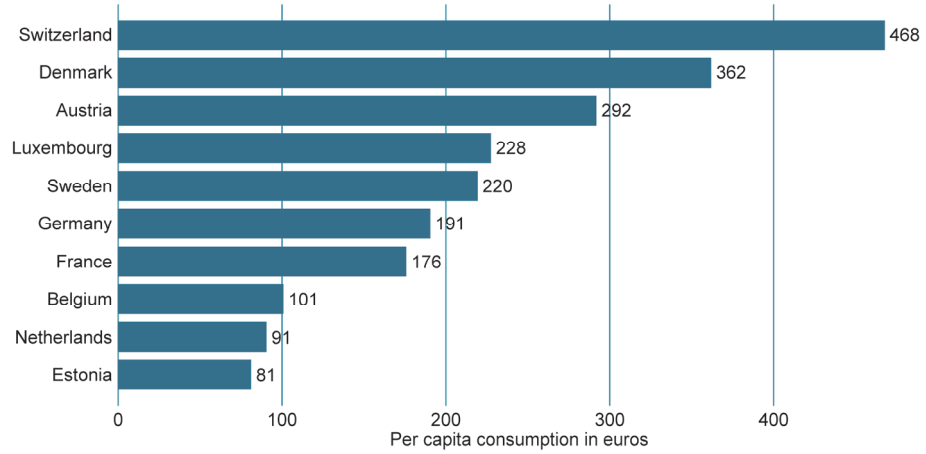


Figure 91: Europe: The countries with the highest per capita consumption 2023

Source: FiBL-AMI survey 2025 based on national data sources. For detailed data sources, see annex, page 333.

Europe and European Union: Growth of the per capita consumption 2010-2023

Source: FiBL-AMI surveys 2006-2025

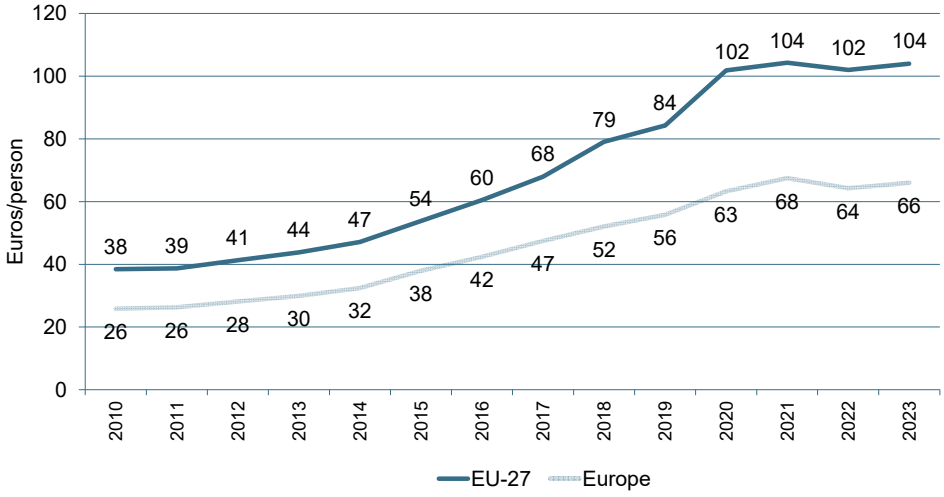


Figure 92: Europe: Growth of the per capita consumption 2009-2023

Source: FiBL-AMI survey 2025 based on national data sources. Calculation based on Eurostat population data. For detailed data sources, see annex.

Europe: Marketing channels for organic products in selected countries 2023

Source: FiBL-AMI survey 2025

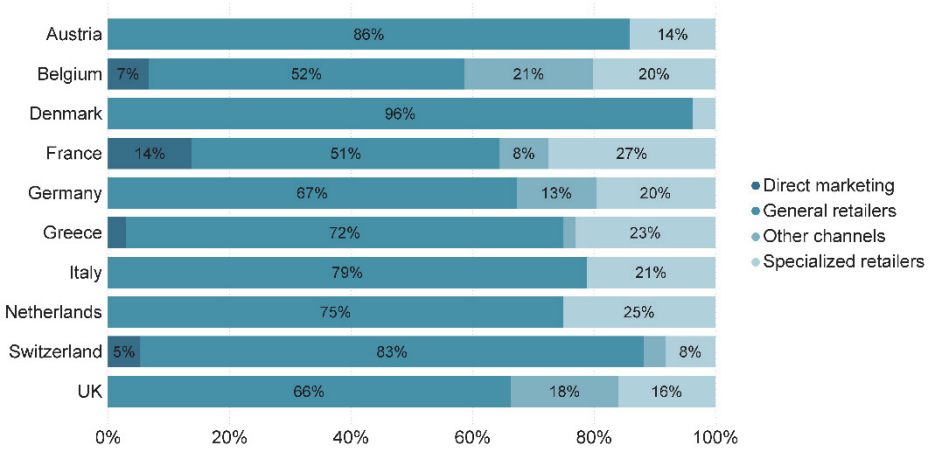


Figure 93: Europe: Marketing channels for organic products in selected countries 2023

Source: FiBL-AMI survey 2025 based on national data sources.
For detailed data sources, see annex, page 333.

Development of food service in Denmark (in Danish Crowns)

Source: Statistics Denmark

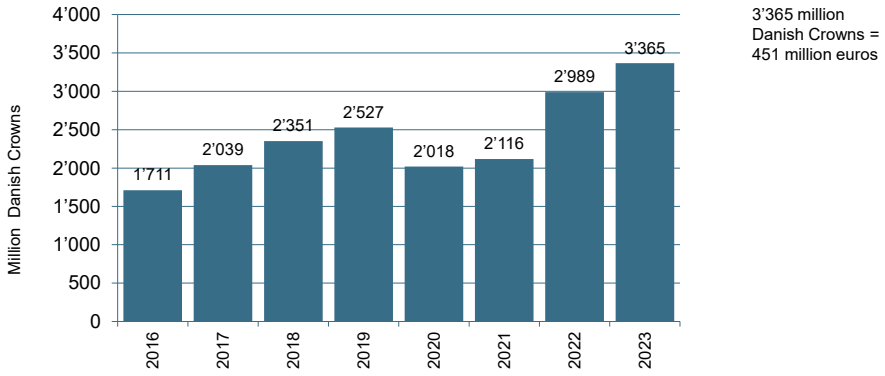


Figure 94: Denmark: Growth of organic food service 2016-2023

Source: Statistics Denmark

Table 26: Organic shares (%) for retail sales values (euros) for selected products 2023

	Austria (2023)	Belgium (2023)	Czech Republic (2022)	Denmark (2023)	Finland (2023)	Germany (2023)	Nether-lands (2023)	Sweden (2023)	Switzer-land (2023)	UK (2023)
Baby food					23.0			21.9		64.9
Beverages		2.5	0.4						4.9	
Bread & bakery products		7.0 (bread)	1.0	4.7 (rye bread)		6.7 (bread)	1.6	0.6 (bread)	27.1 (bread)	0.2
Eggs	19.2	15.8		37.0	13.0	20.4	17.6	19.4	28.4	8.5
Fish and fish products							1.9			
Fresh vegetables	22.7	8.0		35.2	2.0	13.0			25.4	4.8
Fruit	16.2	6.6			6.0	8.9			20.2	3.0
Fresh vegetables and fruit			2.3				7.5			
Meat/meat products	6.9 (meat)	5.4 (meat)	0.5	8.2 (beef)		5.7 (beef & pork)	4.5	6.2 (beef)	6.5 (incl. fish)	1.6 (incl. fish)
Milk and dairy products			2.0				5.0		11.8	3.9
- Butter	10.5					6.2				2.2
- Cheese	10.3	3.7		10.9		5.5		1.6	9.8	0.9
- Milk	28.3	2.6		41.9	3.0	14.7		11.1	24.4	4.9
- Yoghurt/Quark	24.7					10.3			11.7	8.5
Organic share of total food market	**11.0**	**3.7**	**1.7**	**12.0**	**1.9**	**6.3**	**3.3**	**8.2**	**11.6**	**1.6**

Sources: FiBL-AMI survey 2025, based on data from Austria: RollAMA/GfK RollAMA/YouGov Consumer Panel Austria provided by AMA-Marketing, Belgium: Biowallonie; Czech Republic: UZEI; Denmark: Organic Denmark based on Kauzas Household panels prepared for Organic Denmark, provided by Danish Agriculture & Food Council, Finland: Pro Luomu; France: Agence Bio; Germany: Agricultural Market Information Company AMI based on GfK; Italy: supermarkets and discounters only, data provided by_Marche Polytechnic University; Netherlands: Bionext; Sweden: Organic Sweden and Ekologiska Lantbrukarna; Switzerland: Bio Suisse based on Nielsen; UK: Soil Association Certification/ based on NiQ.
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.

Outlook

In 2023, organic farmland and the number of organic producers continued to grow at a moderate pace. The organic retail sales in Europe and the EU expanded similarly, in line with the increase in area and producers. Growth was mainly by higher prices.

Despite these positive trends, economic challenges remained at the forefront. Declining household incomes and rising consumer goods costs, including energy, led some segments of the population to alter their purchasing habits. While some consumers reduced their consumption of organic products, others sought more affordable alternatives. An interesting trend emerged in Germany, where discount stores saw robust growth in organic product sales, even amid significant price increases in these outlets.

Looking ahead, 2024 still presented challenges for the organic market. However, preliminary data suggests that some markets are showing signs of recovery, offering hope for continued growth. Growth was not only driven by higher prices but also by an increase in the volume of products purchased.

To meet the EU's Farm to Fork target of 25 percent organic farmland in Europe by 2030, timely and effective support measures will be crucial. Addressing economic challenges and ensuring that organic products remain accessible to all consumers will be key to sustaining growth in the organic sector.

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The full data set as well previous editions of this brief are available on the European Commission's webpage on agricultural markets in the organic sector at https://agriculture.ec.europa.eu/data-and-analysis/sustainability-and-organic-farming/agricultural-markets-organic-sector_en

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