



Research Institute of Organic Agriculture FiBL
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Organic market development in Europe

Helga Willer, Research Institute of Organic Agriculture FiBL

October 14, 2021, Annual Conference of the Estonian Chamber of Agriculture and Commerce



Euroopa Maaelu Arengu
Põllumajandusfond:
Euroopa investeringud
maapiirkondadesse

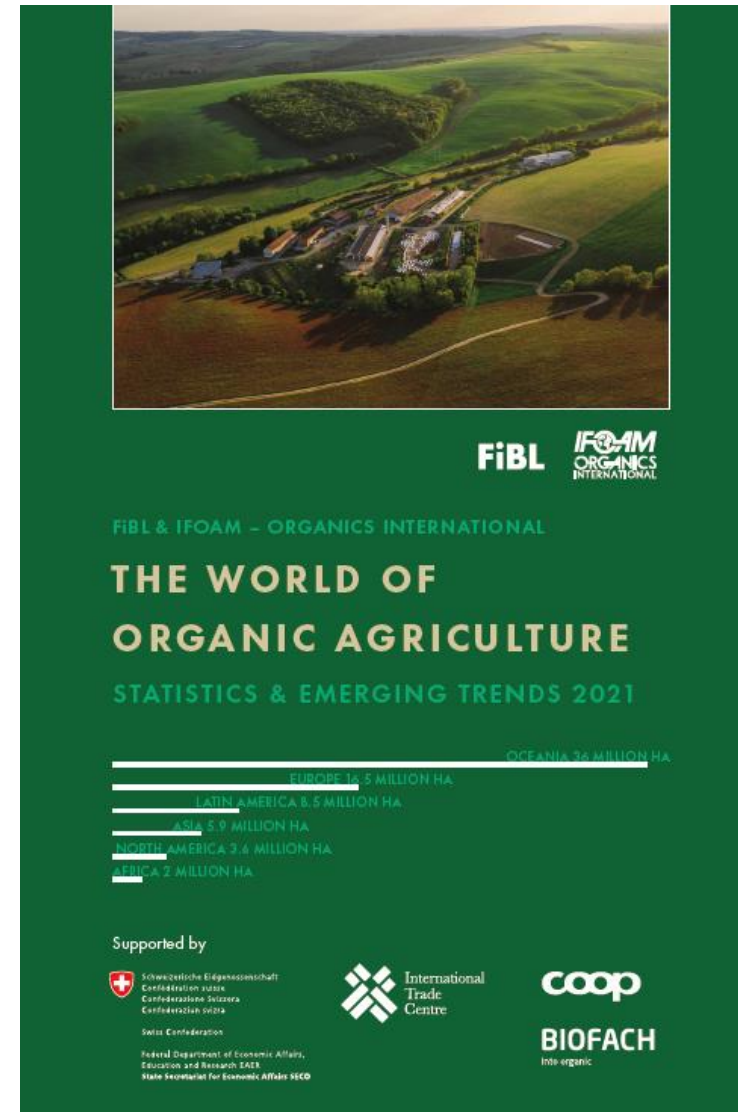
The World of Organic Agriculture 2021

www.organic-world.net

- › The 22nd edition of 'The World of Organic Agriculture', was published by FiBL and IFOAM – Organics International in February 2021.
- › Data tables and graphs
- › Country and continent reports
- › Markets, standards, policy support

- › www.organic-world.net

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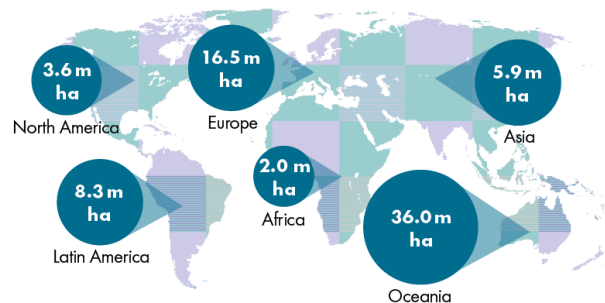
International
Trade
Centre

coop

BIOFACH
into organic

The World of Organic Agriculture 2019

Organic Farmland 2019



72.3 m ha

Organic farmland in million hectares

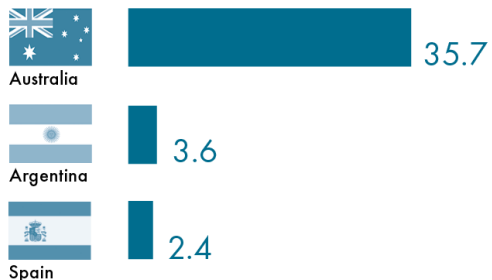
+1.6%

From 2018

187

Countries with organic farming

Top 3 countries
(land in million of hectares)



Organic Producers 2019

The number of organic producers is increasing

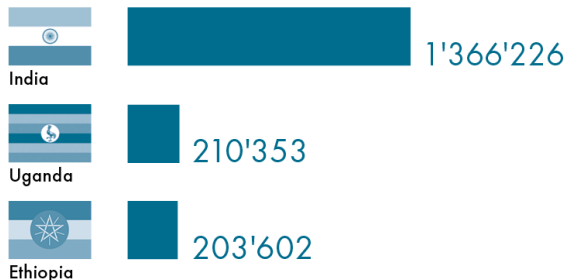
3.1 million

Organic farmers

+13%

From 2018

Number of producers:
Top 3 countries



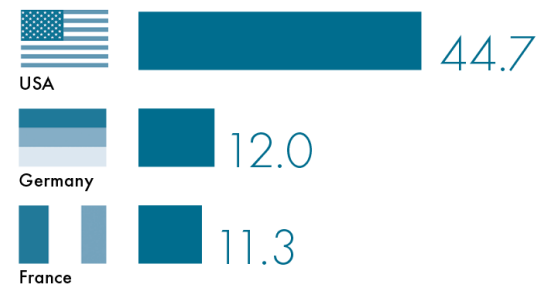
Organic Market 2019

The global market is growing and consumer demand is increasing

Over 106

Global organic food market in billion euros

Top 3 countries
(market in billion euros)



13.4% Organic market growth

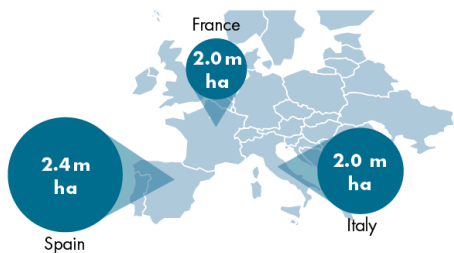
12.1% Market share

344 € Highest per capita spending is in Denmark

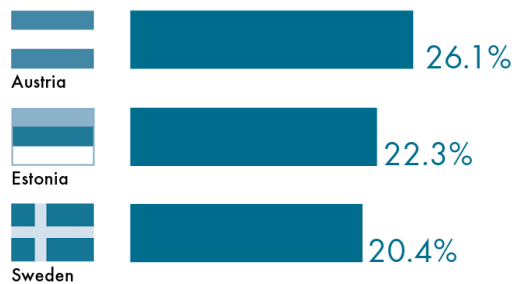
Organic Agriculture in the European Union 2019

Organic Farmland 2019

Top 3 countries (largest organic area)



Organic share of total farmland: Top 3 countries



Organic Producers & Processors 2019

The number of organic producers is increasing



Organic producers



From 2018

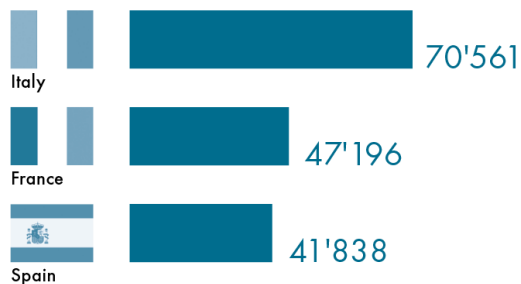


Organic processors



From 2018

Number of producers: Top 3 countries



Organic Market 2019

The European market is growing



EU organic retail sales in billion euros

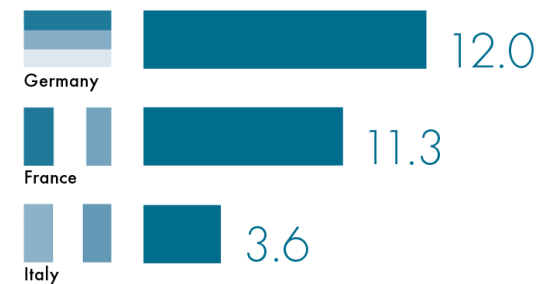


Per capita spending



Organic market growth

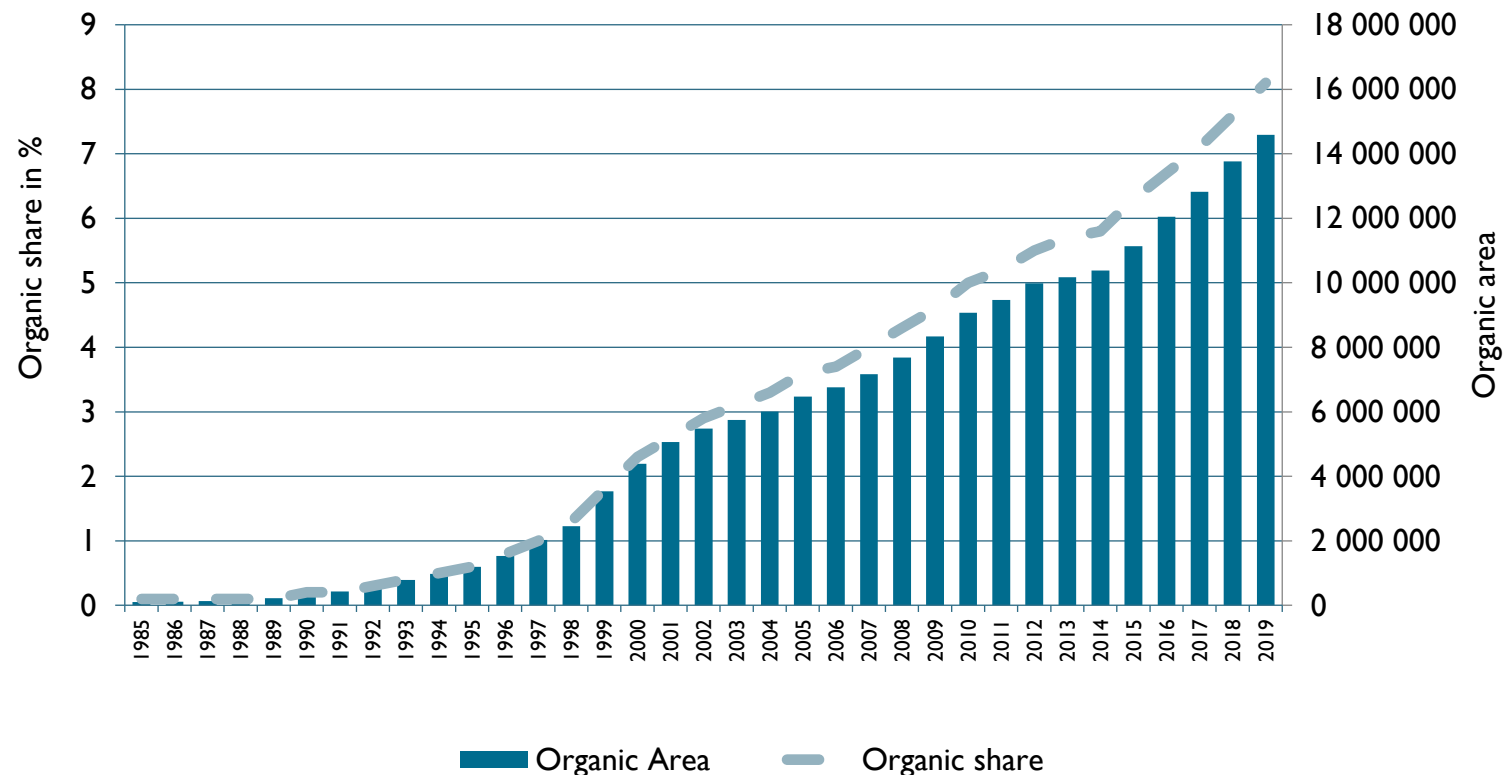
Organic retail sales: Top 3 countries (in billion euros)



European Union: Growth of the organic farmland

European Union: growth of organic area and organic share 1985-2019

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



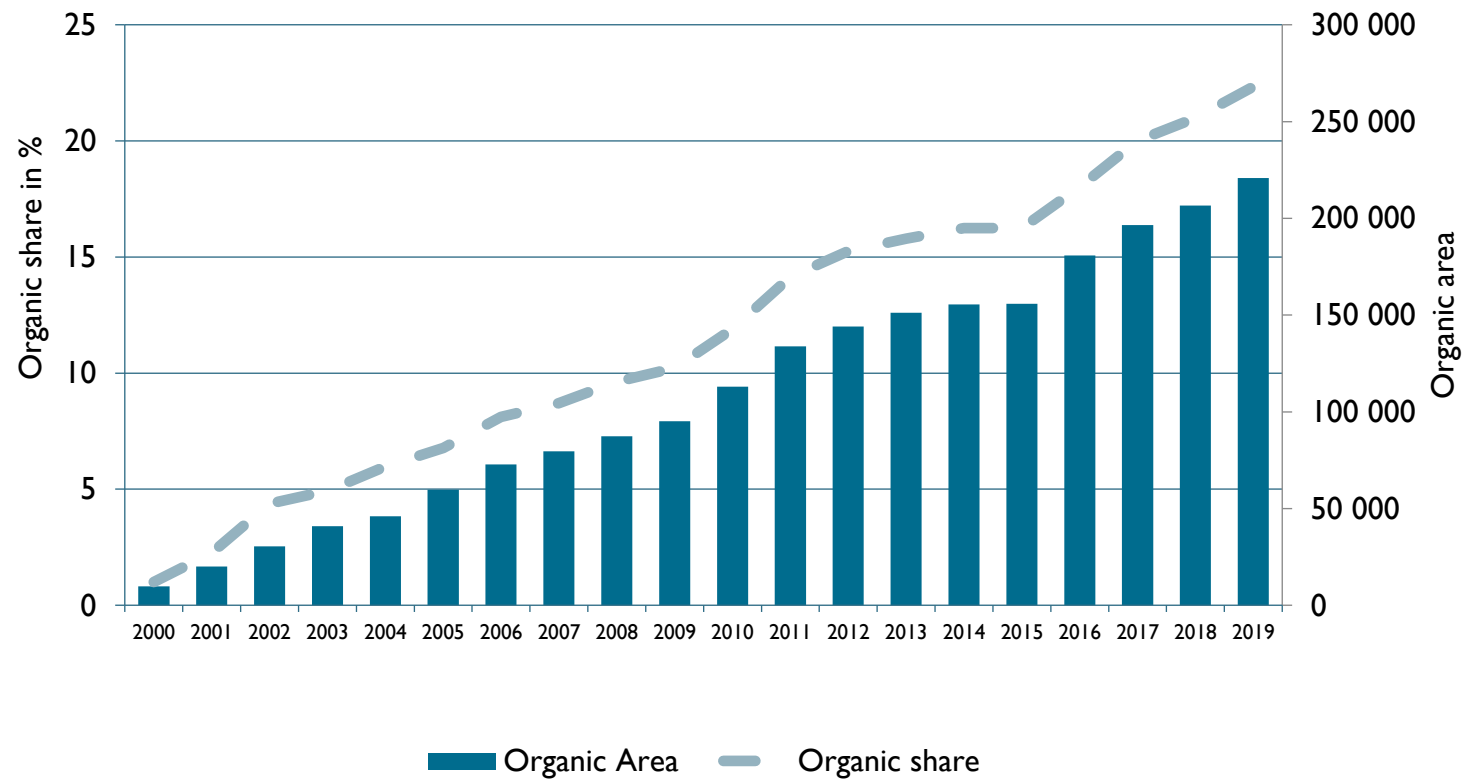
Developments 2020

- Strong area growth in some countries (France and Spain)
- Weaker growth in others (Germany and Austria).
- Austria 2020: Area increase 0.9%, retail sales increase 18%
- EU-27 growth rates in the past years: Single digit

Estonia: Growth of the organic farmland

European Union: growth of organic area and organic share 1985-2019

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



Countries with an organic share of at least 10 percent of the agricultural land 2019

Countries with an organic share of at least 10 percent of the agricultural land 2019

Source: FiBL survey 2021

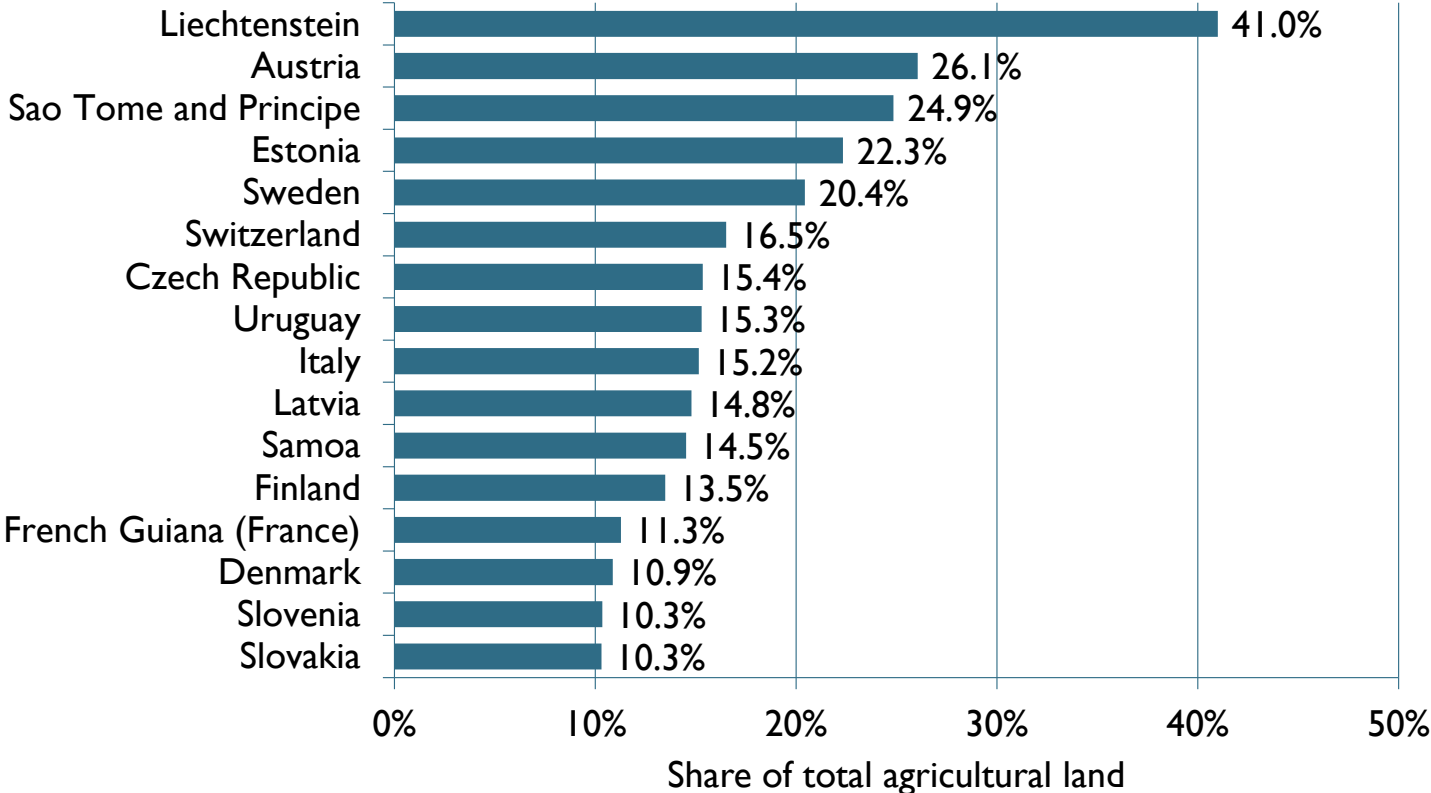
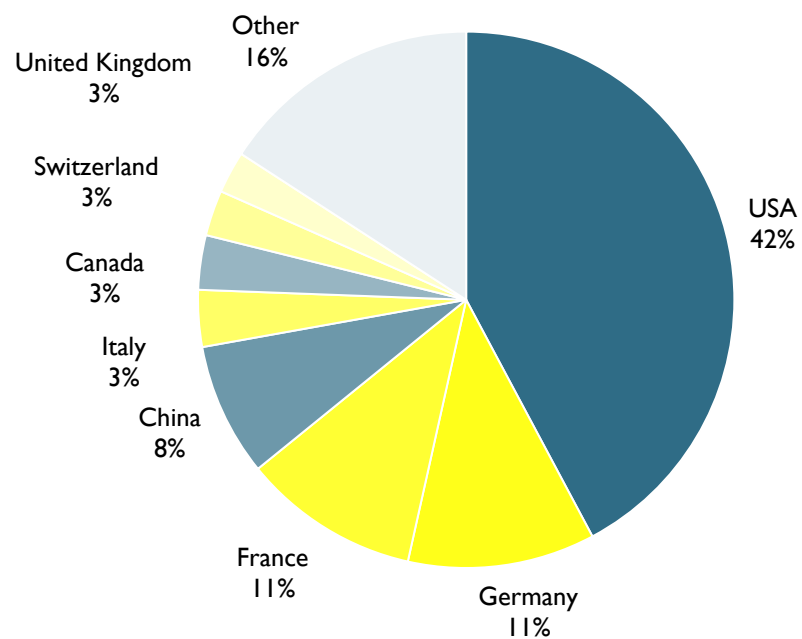


Figure: Distribution of retail sales in Europe and worldwide

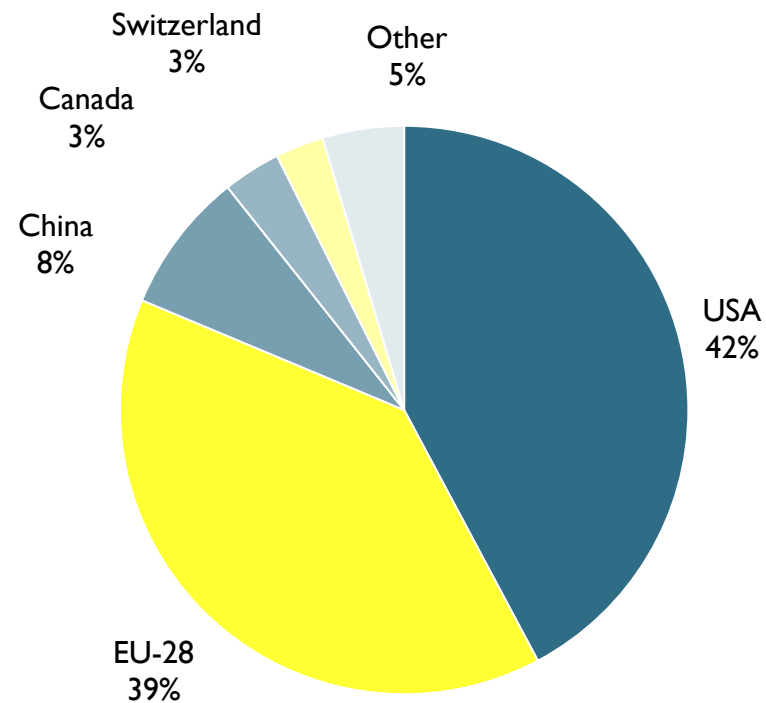
Global market: Distribution of retail sales value by country 2019

Source: FiBL-AMI survey 2021, based on retail sales with organic food



World: distribution of retail sales by single market 2019

Source: FiBL-AMI survey 2021

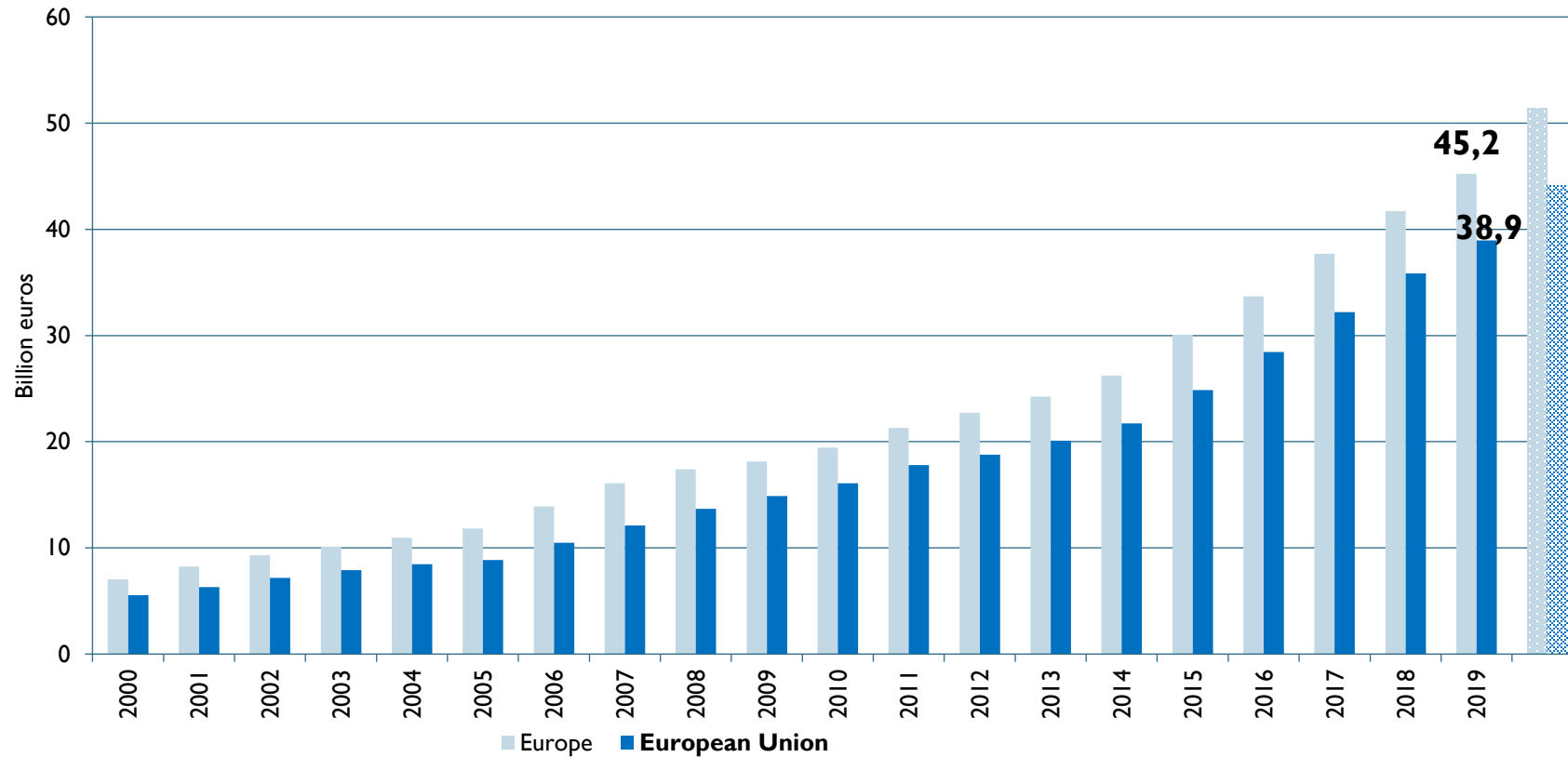


Europe and European Union (EU-27): Development of retail sales 2000-2019

Europe and European Union: Development of retail sales 2000-2019

Source: FiBL-AMI Surveys 2006-2021, OrganicDataNetwork Surveys 2013-2015:

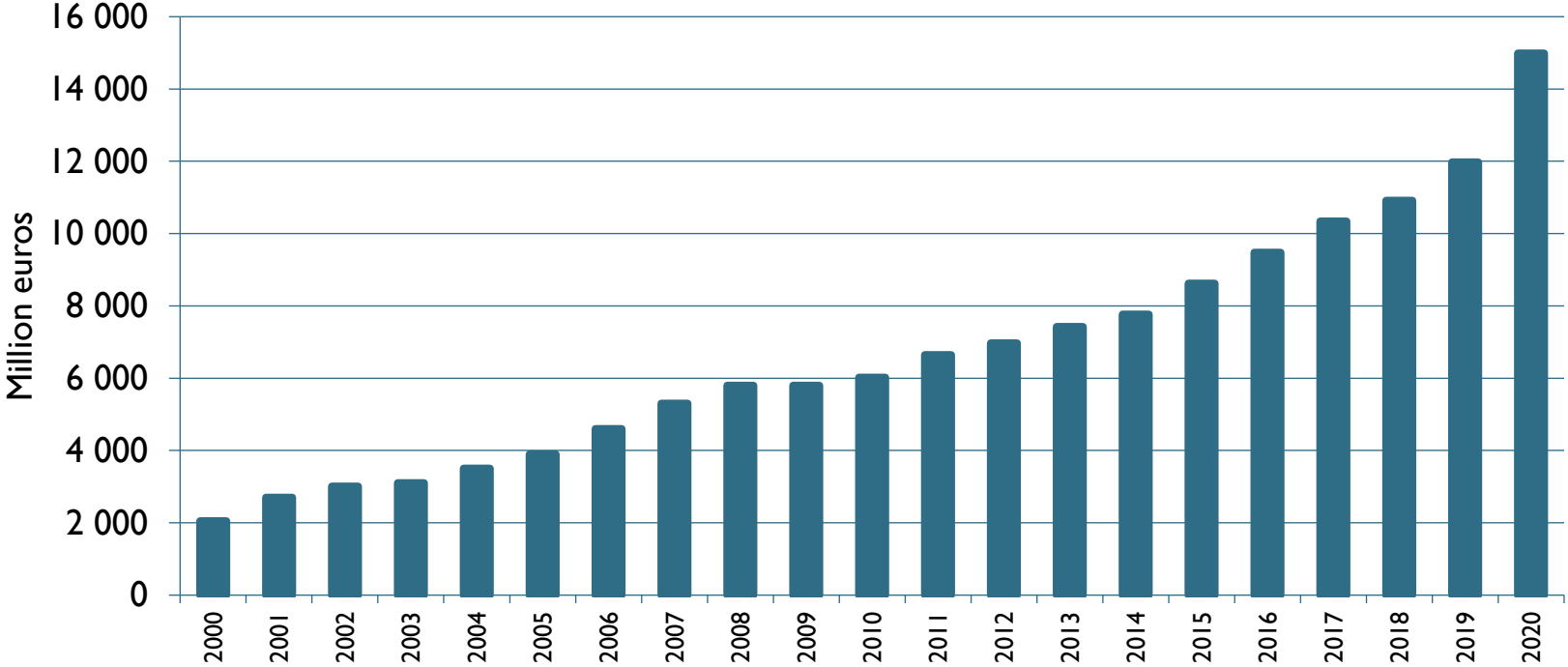
FOR EU: ONLY COUNTRIES THAT WERE EU MEMBER STATES in 2020



Germany: Growth of retail sales

Germany: Growth of organic food and beverages retail sales 2000-2020

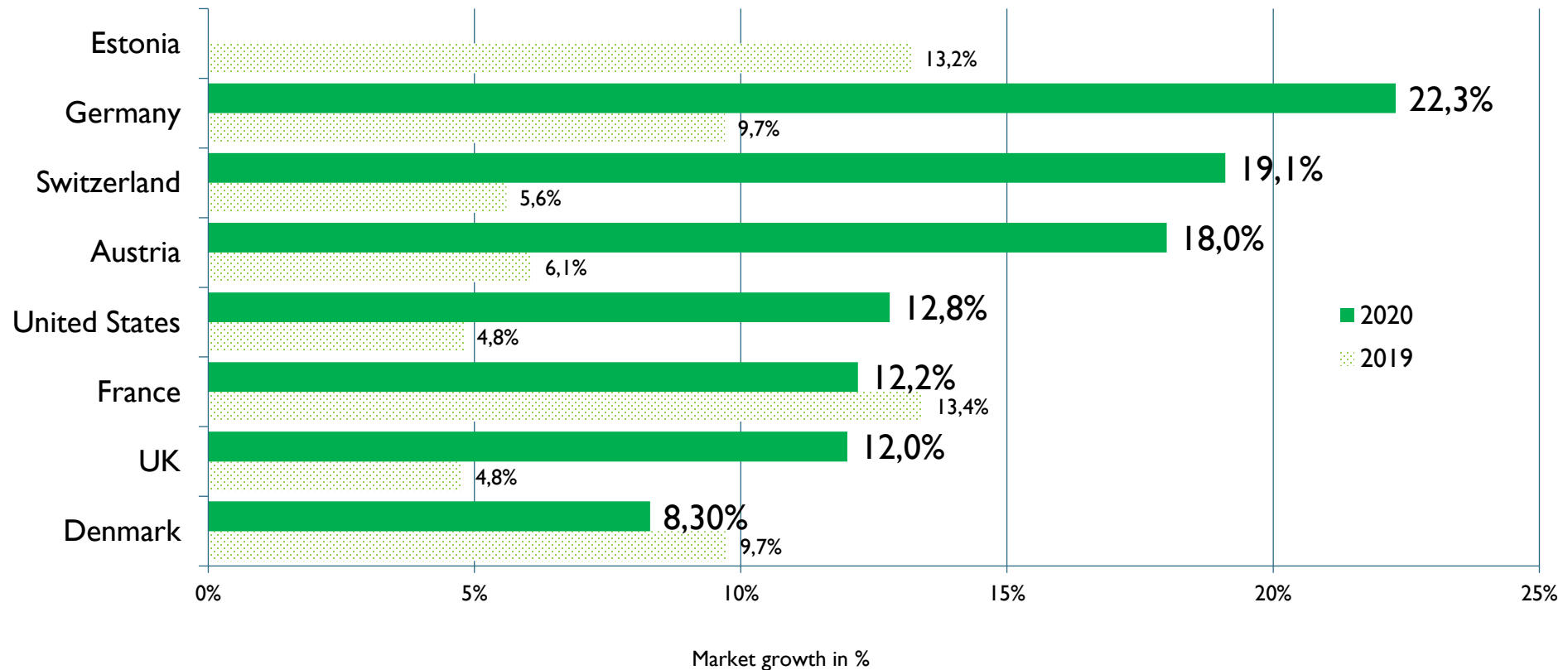
Source: FiBL-AMI surveys 2000-2021



Market growth rates

Europe: Market growth 2019 +2020 compared

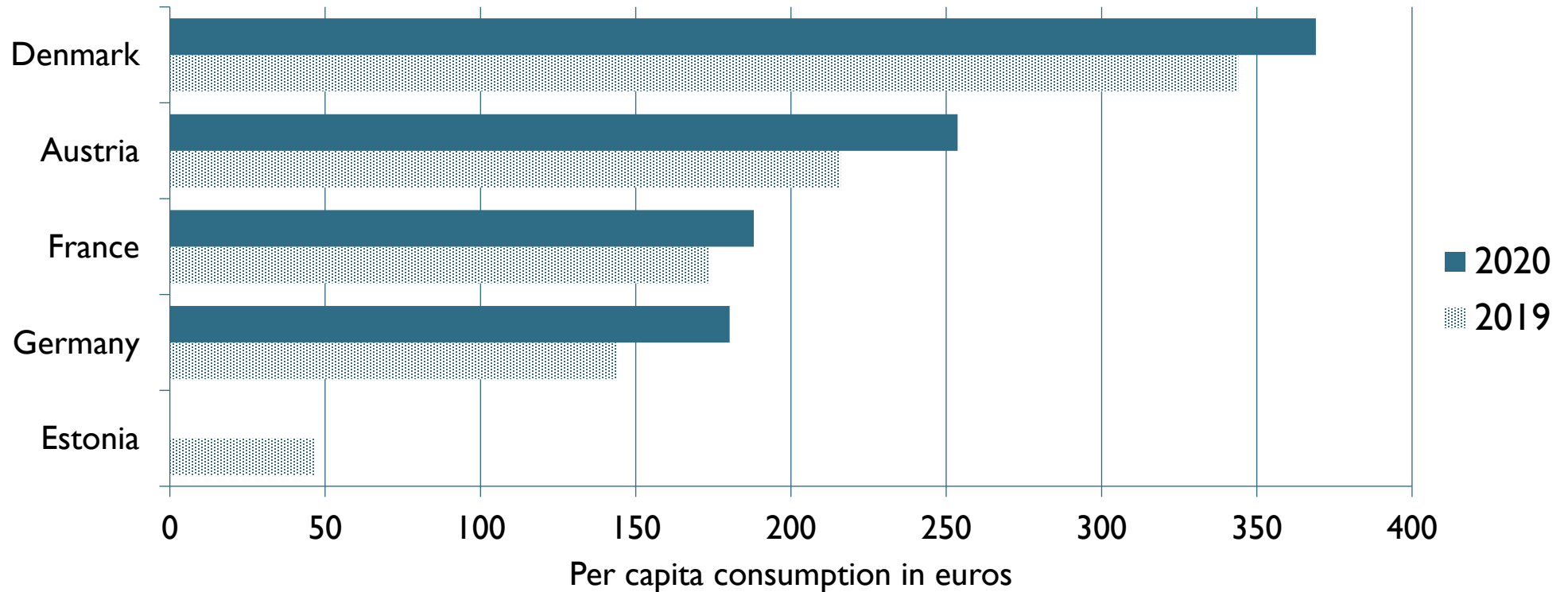
Source: FiBL-AMI survey 2021



Countries with the largest per capita consumption EU-27

The ten countries with the highest per capita consumption 2019 and 2020 compared

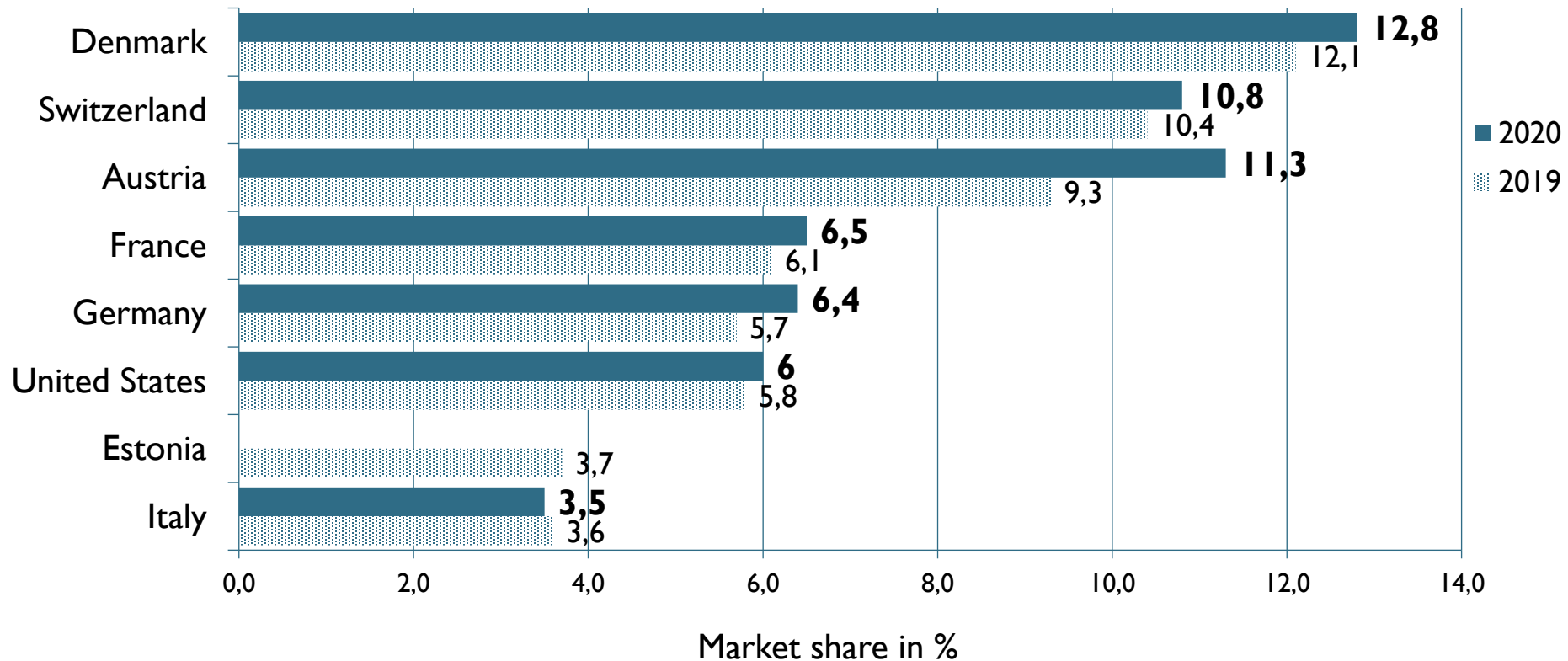
and 2019 Source: FiBL-AMI survey 2021



Europe: The ten countries with the highest organic market shares

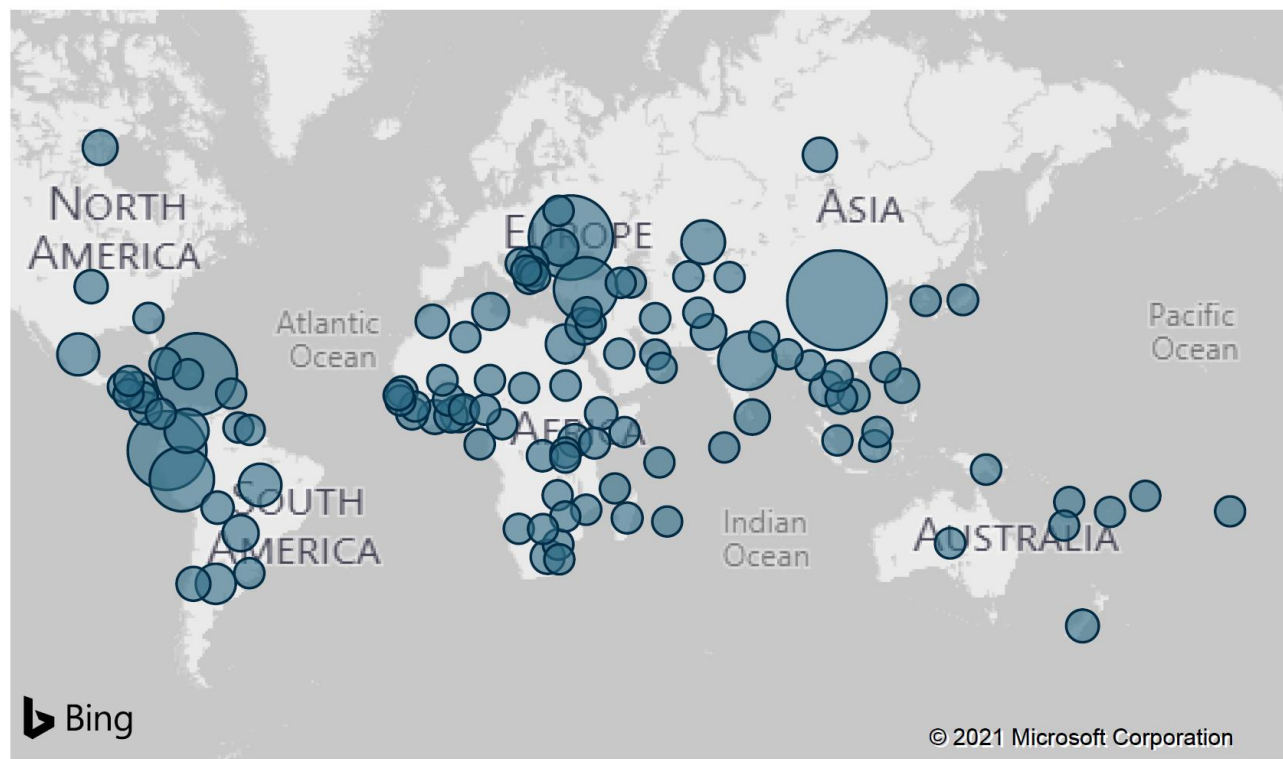
Europe: The countries with the highest organic shares of the total market 2018 and 2019

Source: FiBL-AMI survey 2021



Organic imports to the European Union

Exporting countries (exports in metric tons)

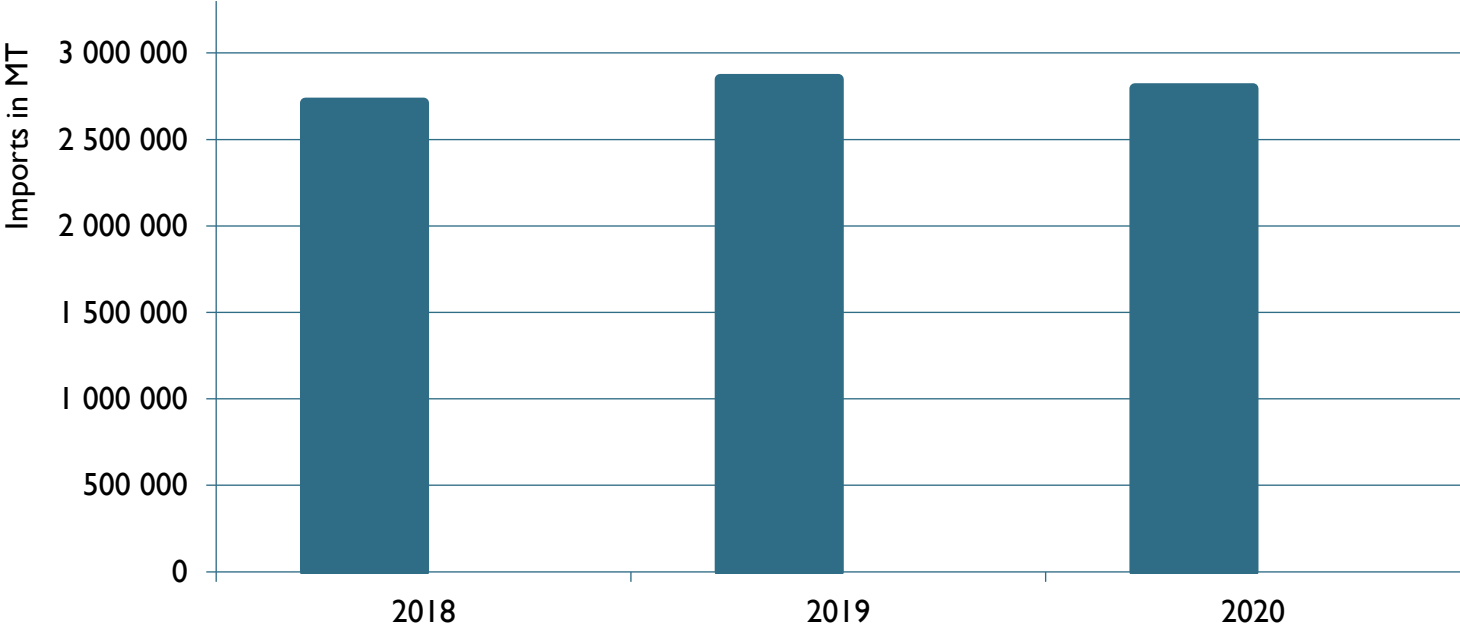


FiBL survey based on national data sources and Eurostat: <https://statistics.fibl.org>

Organic imports to the European Union (EU-27)

European Union: Development of organic imports 2018-2020

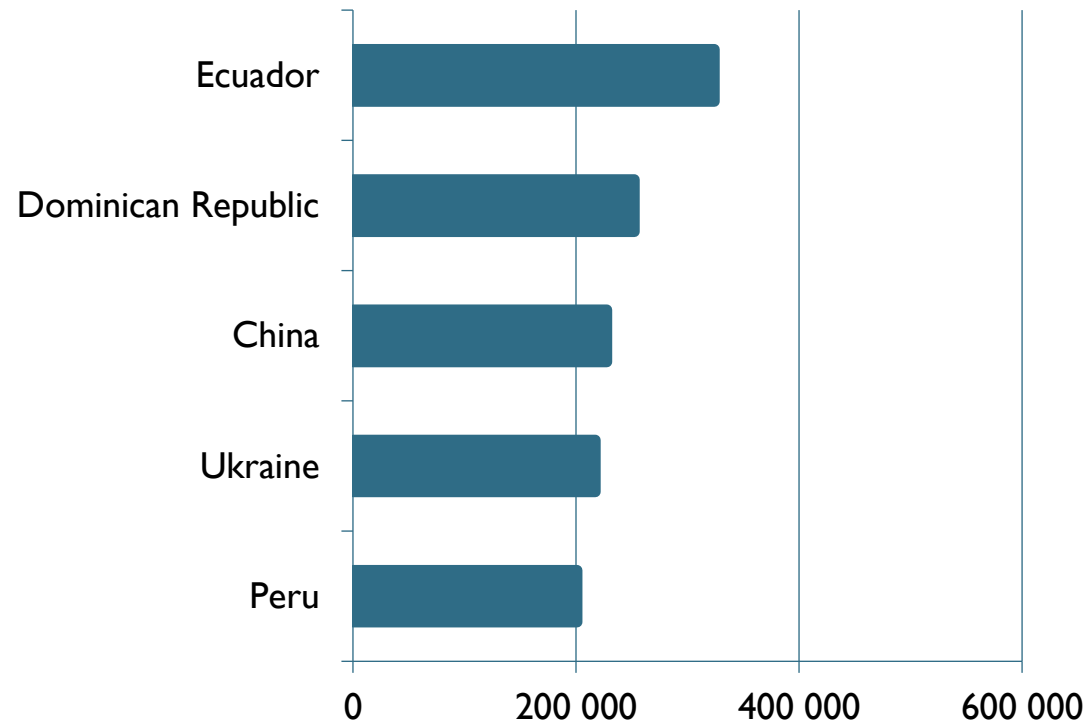
Source TRACES/European Commission 2021



Top exporters to the European Union and EU importers 2020 (EU-27)

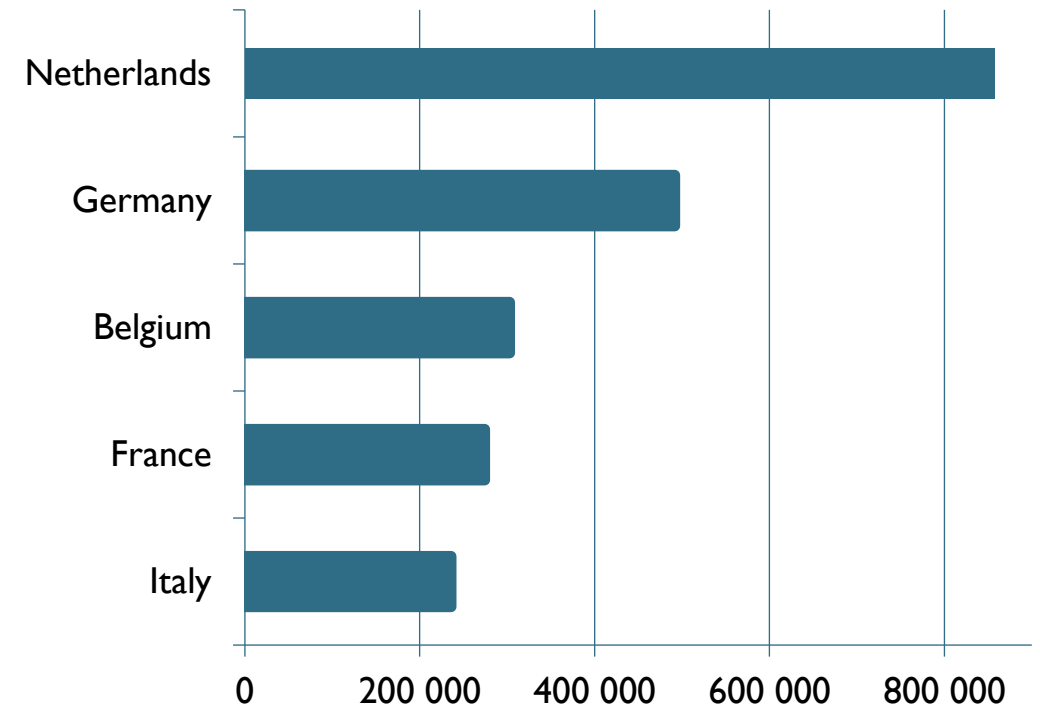
Top Exporting countries to the EU

Source TRACES/European Commission 2021



Top importing countries

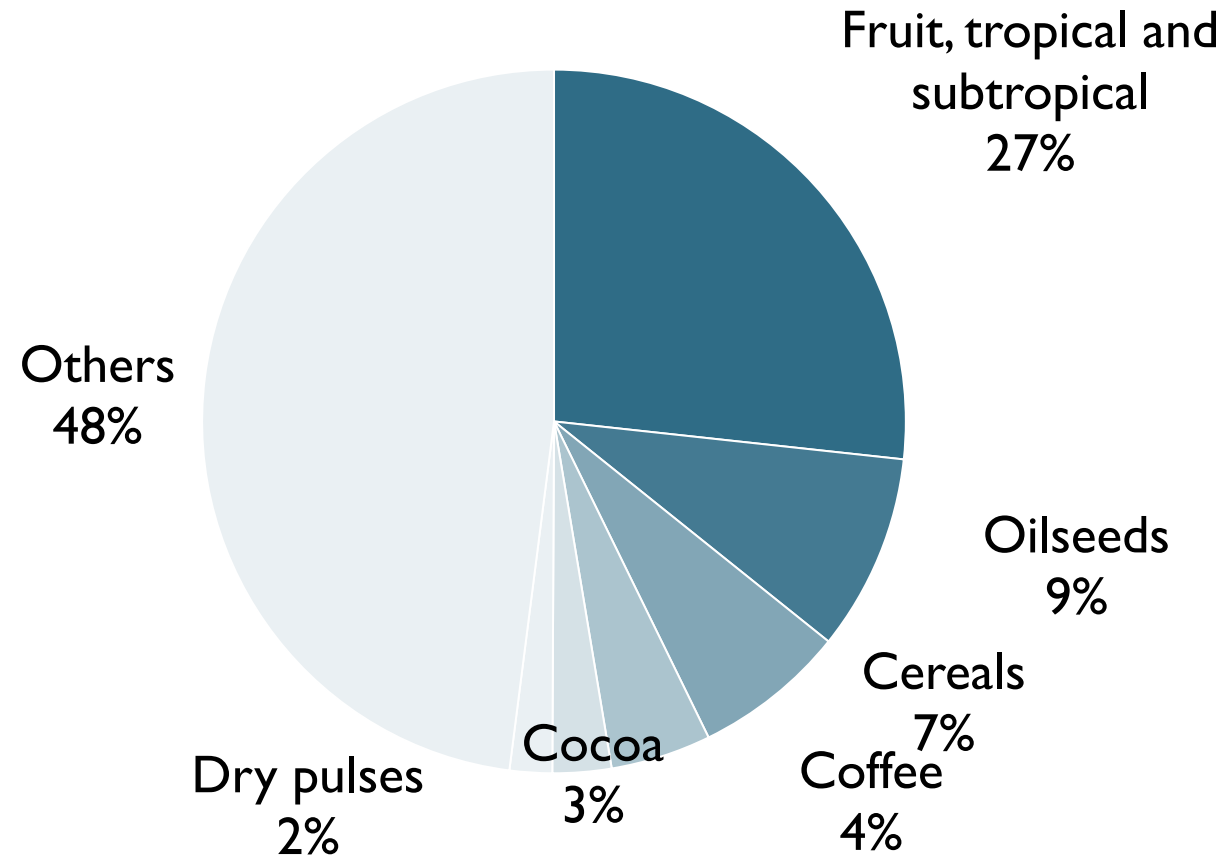
Source TRACES/European Commission 2021



EU organic imports by crop group 2020

European Union: Organic imports 2020

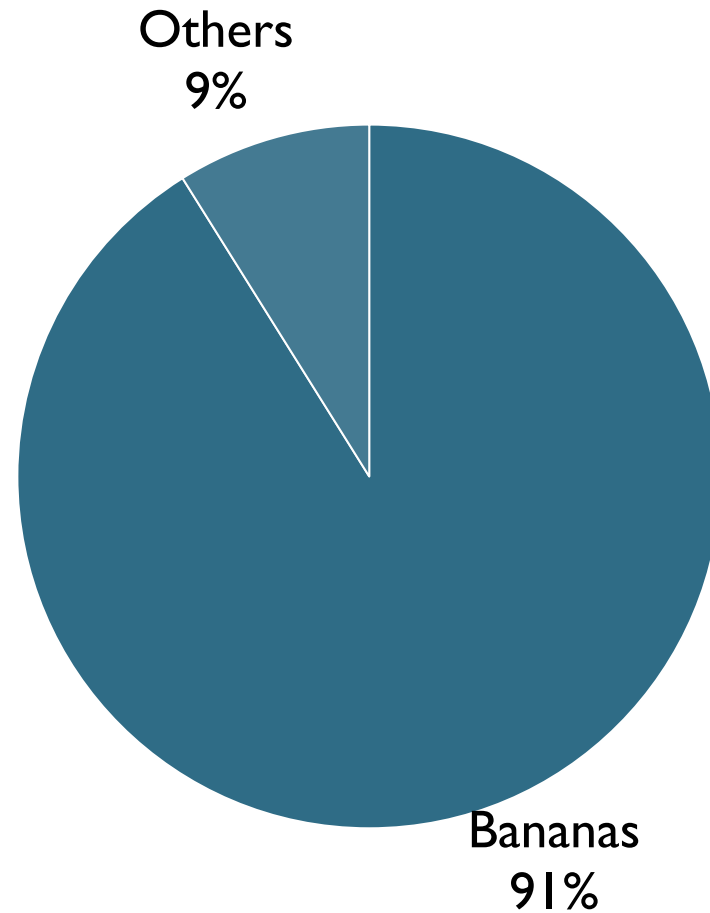
Source: TRACES 2021



Organic exports from Ecuador to the European Union

Ecuador: Organic exports to the European Union 2020

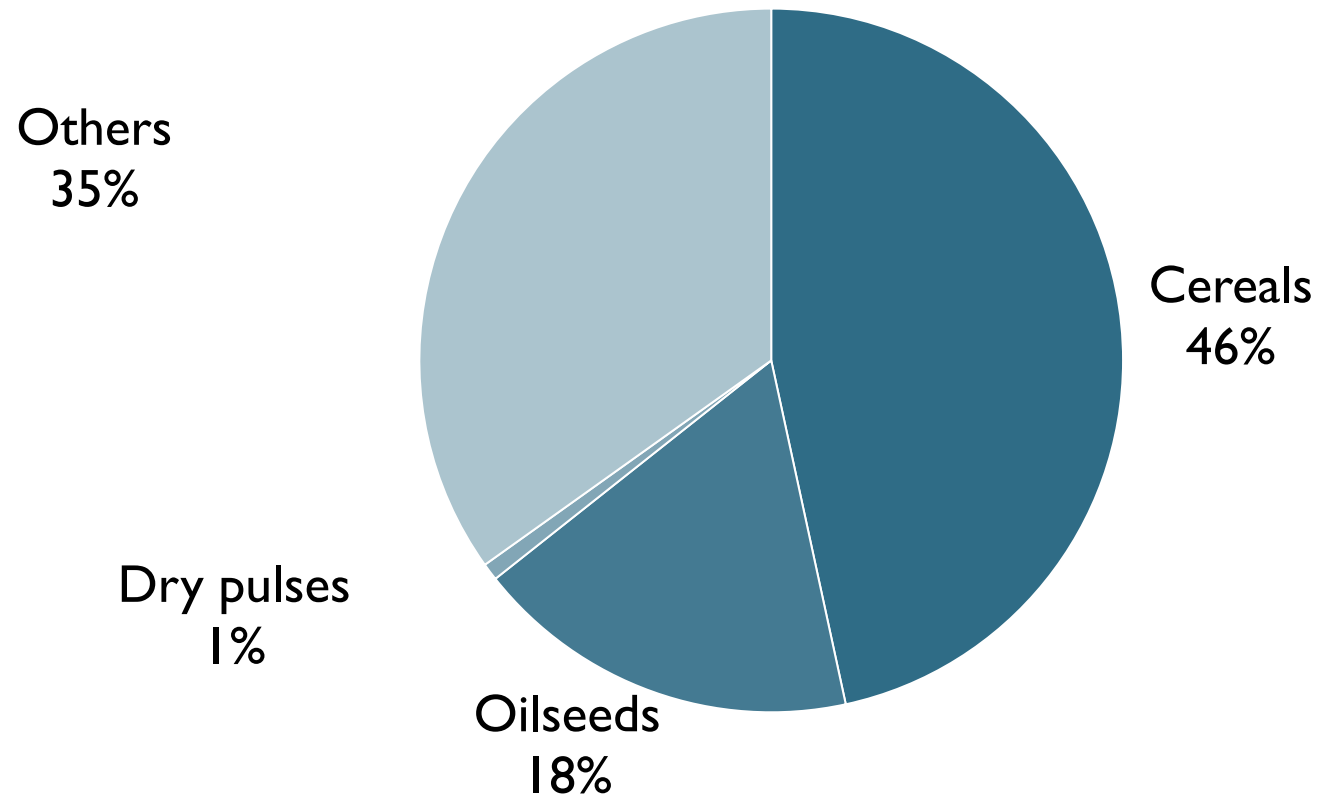
Source: TRACES 2021



Organic exports from Ukraine to the European Union

Ukraine: Organic exports to the European Union 2020

Source: TRACeS



Germany



- Corona and the rising inhouse consumption pushed the organic market tremendously
- Consumers more often decided for organic, healthy, and sustainable products when cooking at home
- Organic market grew twice as fast as the general food market
- Production costs have increased (hygiene, distribution, labour force)
- Imports of cereals, potatoes, fruit, milk have decreased with bigger domestic supply
- Organic Market grew by 22.3 % up to 14.99 billion EUR – approx. 6.4 % organic share of the food market

Source: AMI 2021



United States: 2020 was a year like none other in recent retail history.

- In a time of deep concern for personal health, during which daily life was remade by a global pandemic, **both the organic food and non-food markets eclipsed major milestones.** Organic food sales surpassed \$56 billion, up 12.8% percent – **the highest rates recorded in organic in well over a decade.** Organic non-food sales totaled nearly \$5.5 billion, up a strong 8.5 percent.
- “Increased eating at home, along with concerns about personal health contributed to shoppers being willing to invest in organic and to try new products. The healthy implications associated with organic foods and products made this category more important than ever during a global pandemic, as people looked for ways to find overall wellness.”

Source: OTA 2021

Key trends and developments: COVID 19

- The COVID-19 pandemic has had in some countries a tremendous impact on most people's purchasing behaviour and thus has given the organic market an unprecedented upturn in many countries.
- However, in some countries COVID 19 also lead to a crisis of the organic sector, due to supply chain issues or schools closing (no more school meals, closing of public canteens)
- Health, environment and climate change have become big issues.
- Online-sales such as subscription boxes for organic have grown tremendously and other forms of contactless shopping such as 'Click and Collect' in some countries.
- **With the growing market, organic production and processing need grow at the same level as the market.**

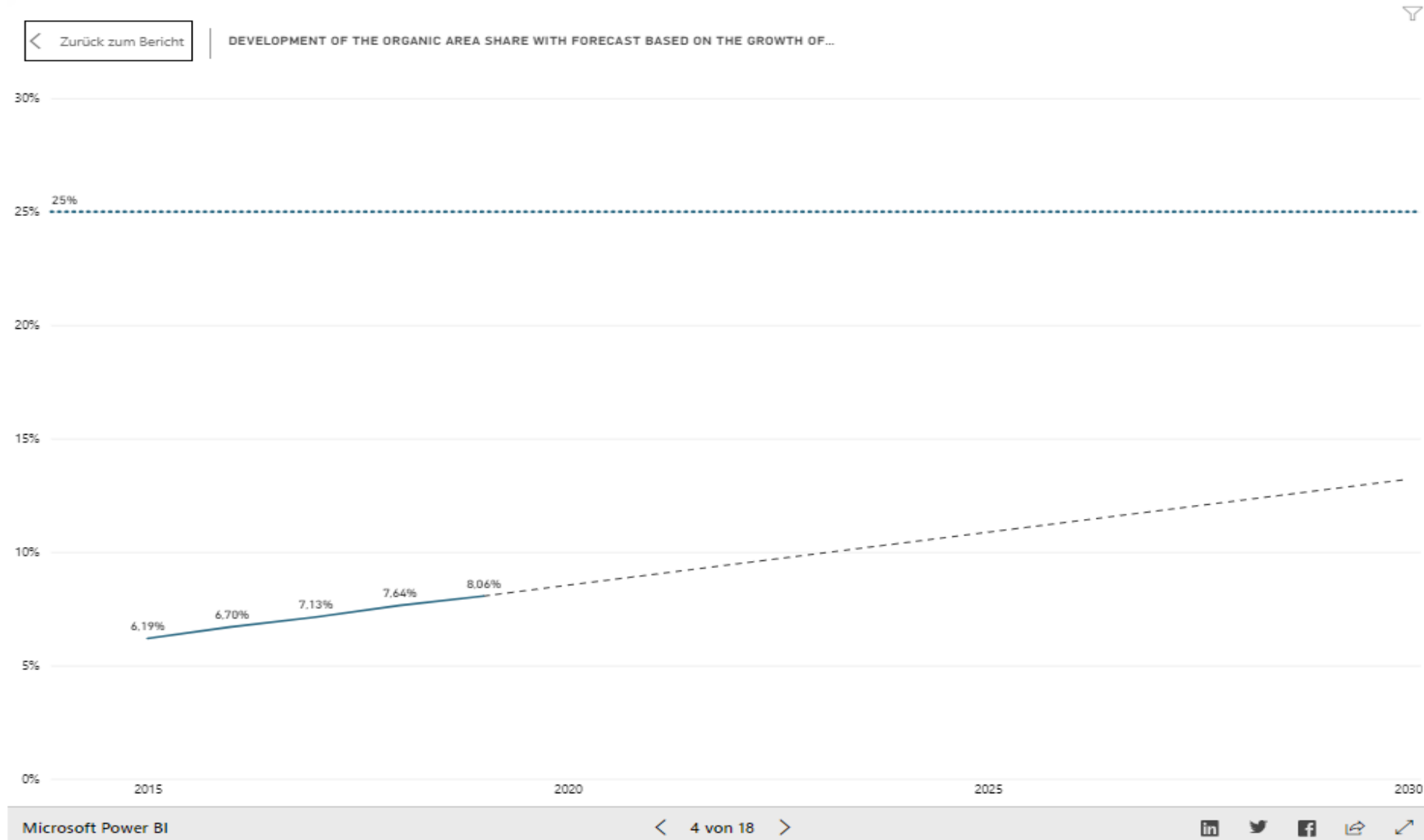
Key trends and developments: Farm to Fork strategy

- The European Union's Farm to Fork-strategy can support this development with several measures.
- The F2F strategy includes a target which aims at **achieving at least 25 percent of the EU's agricultural land under organic farming by 2030**
- To reach this target the organic sector needs
 - political support at all levels.
 - a good regulatory framework
 - adequate support under the **Common Agricultural Policy** – with clear support for organic in the national strategic action plans – and
 - a powerful **European Organic Action Plan with** concrete actions supporting conversion, market development and capacity building of the European organic sector.
 - Close **collaboration of all stakeholders**

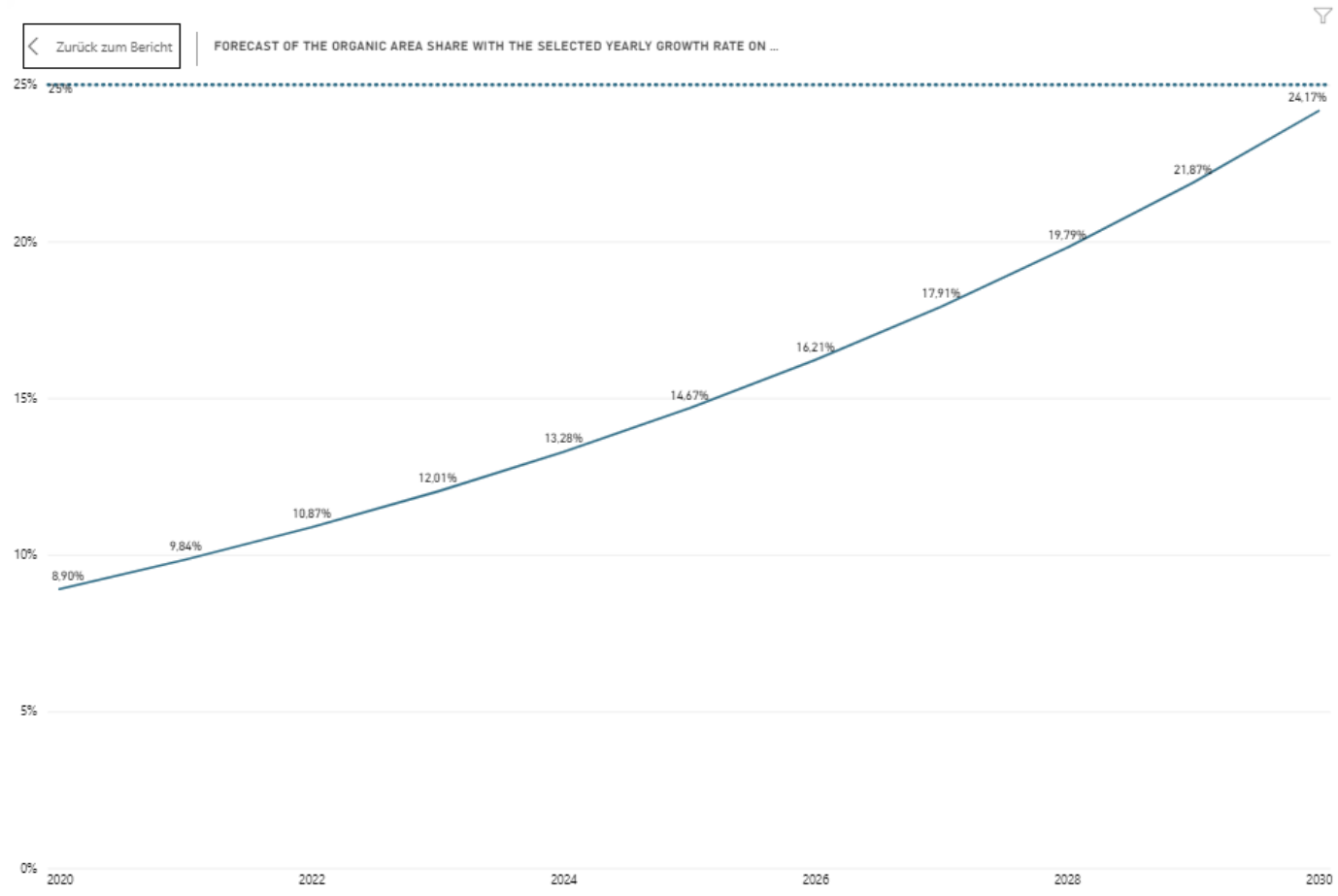
Opportunities to reach the 25% goal

- The organic market continues to grow and grew particularly strong in 2020, growth continued in 2021
- Organic imports are stagnating > Opportunity for EU organic farmers
- A large part of the EU organic imports are tropical fruit, which cannot be replaced by EU production
- However, another very large part of the EU organic imports are cereals, oilseeds/oilcakes, and dry pulses (almost one third of the volume), i.e. most of the feedstuffs (potential feedstuffs)

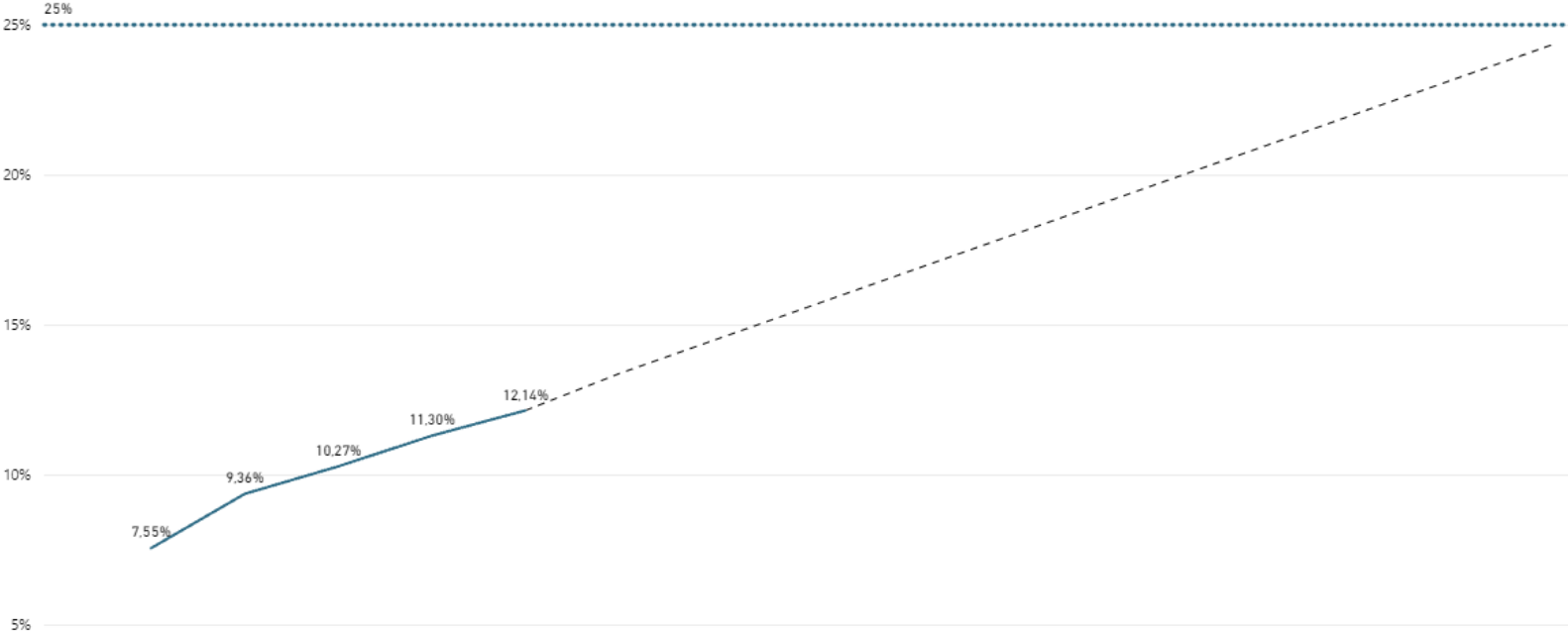
What happens if the EU organic farmland continues to grow as it did 2015 to 2019? (EU-28)



What happens if the EU organic farmland grows by 10% annually



Potential development of retail sales in Denmark



Conclusions

- In 2019 organic farming continued to grow both in Europe and world wide; and again all time highs were reached for the organic farmland, producers and market.
- In 2020 the area continued to grow like in the previous years, but the market grew considerably faster than in the past.
- Imports to the European Union remained stable, showing the the EU is increasing local production.
- Public food procurement was on rise until the COVID-19 crisis, but data are missing in order to have a clear picture about it actual importance.
- For better monitoring of the development of the sector and to increase transparency, data collection and processing need to be improved in many countries, in particular for market and international trade data including intra-EU-trade.

Resources

- «The World of Organic Agriculture» at www.organic-world.net
- Slides and infographics at www.organic-world.net
- [Twitter.com/fiblstatistics](https://twitter.com/fiblstatistics)
- Interactive data tables at statistics.fibl.org
- Interactive data visualisations at statistics.fibl.org
- Interactive map at www.ifoam-eu.org

FiBL Statistics - European and global organic farming statistics

On Statistics.FiBL.org, the Research Institute of Organic Agriculture FiBL provides access to the data collected in the framework of its annual survey on organic agriculture worldwide. This website is a supplement to FiBL's [Organic-World.net](#) website, which hosts the statistical yearbook [The World of Organic Agriculture](#) and contains country and background information on organic farming worldwide.

GLOBAL DATA >

EUROPEAN DATA >

Announcements

- [February 17, 2021, 4 to 4.45 pm: The World of Organic Agriculture at the BIOFACH eSPECIAL](#)
- [February 17, 2021, 5 to 6 pm: The European Market for Organic Food at the BIOFACH eSPECIAL](#)
- [February 18, 2021, 2 to 3.30 pm: Global Organic Market Overview at BIOFACH eSPECIAL](#)

More news on [Organic-World.net](#)

The World of Organic Agriculture 2021



[The World of Organic Agriculture 2021](#)

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Work in progress

Please note that work on this website is in progress. If you have any questions and suggestions, please let us know and send an e-mail to helga.willer@fibl.org.

Power BI: Interactive data visuals

Statistics >> Visuals >> Key indicators on organic agriculture

Data visualisation: Key indicators

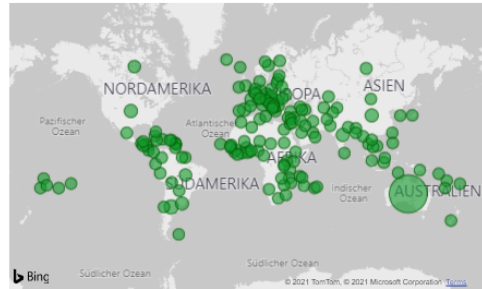
Organic farmland, organic farmland share of total, producers, retail sales, organic wild collection

The work on the key indicators is in progress. Some features are not fully working yet, but will be implemented soon.

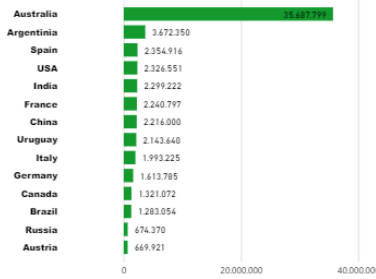
For data on the the key indicators, please check out our interactive online database - [Key indicators](#)

Organic Area 2019

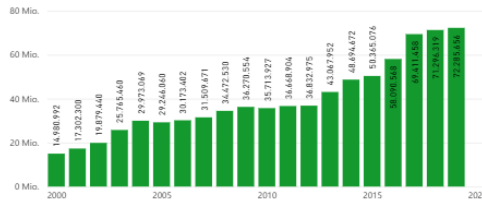
Organic area by country



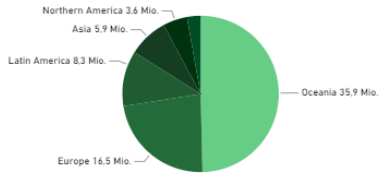
Organic Area



The development of the organic area in hectares



Organic area by continent



FiBL survey based on national data sources, data from certifiers, and Eurostat: <https://statistics.fibl.org>

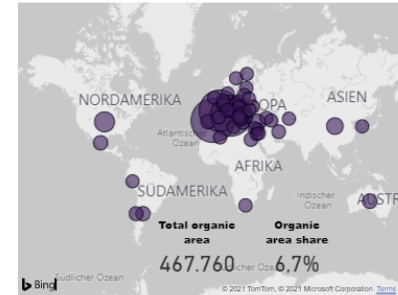
Statistics >> Visuals >> Crops

Data visualisation - Crops

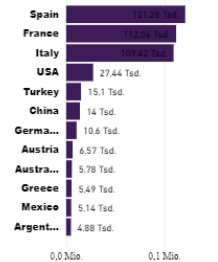
For data on the organic crop area please check out our interactive online database - [Area for selected crops](#)

Organic Grapes Area 2019

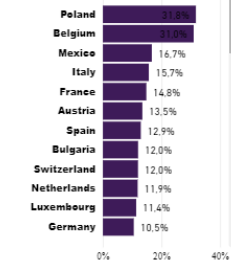
Grapes: Organic area by country



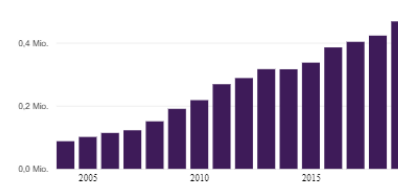
The countries with the largest organic area in million hectares



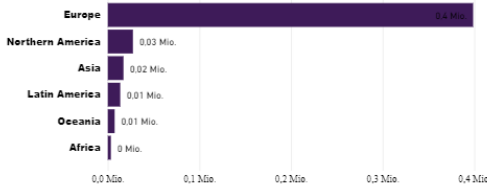
The countries with the highest organic area share in %



The development of the organic grape area in million hectares



Organic area by continent in million hectares



FiBL survey based on national data sources, data from certifiers, and Eurostat: <https://statistics.fibl.org>

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Table of contents of our yearbook "The World of Organic Agriculture" now online - you can look forward to the latest data many interesting articles including information on COVID-19 and its effects on the organic sector. organic-world.net/yearbook/yearb...



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Slide presentations at www.organic-world.net

Organic World

Global organic farming statistics and news

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- ▶ 2000-2007

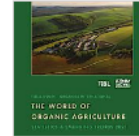
The World of Organic Agriculture 2021

2021 edition of "The World of Organic Agriculture"

☞ [The 2021 edition of "The World of Organic Agriculture" will be launched on February 17, 2021 at BIOFACH.](#)

☞ [More information about BIOFACH 2021 is available on the BIOFACH website.](#)

The World of Organic Agriculture 2021



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