

Media release, 17 February 2021

European organic market grew to €45 billion in 2019

The organic market in Europe continues to grow. In 2019, it increased by another 8 percent and reached €45.0 billion. Some markets enjoyed double-digit growth rates. At this year's digital edition of BIOFACH, the world's leading trade fair for organic food, the Research Institute of Organic Agriculture FiBL, the Agricultural Market Information Company AMI and partners are presenting the data on the European organic sector (BIOFACH eSPECIAL, 17 February 2021, from 5 to 6 pm, Livestream 5).

In 2019, the European organic sector experienced substantial growth in terms of area, producers and markets.

In Europe, 16.5 million hectares of farmland were organic in 2019 (European Union: 14.6 million hectares). With almost 2.4 million hectares, Spain continues to be the country with the largest organic area in Europe, followed by France (2.2 million hectares), and Italy (2.0 million hectares).

Organic farmland increased by almost one million hectares

The organic farmland increased by over 0.9 million hectares in Europe and by over 0.8 million hectares in the European Union, representing an increase of 5.9 percent each. Growth was slower than in 2018 but higher than in the first years of the past decade. France reported almost 206'000 hectares more than in 2018, Ukraine almost 159'000 hectares more, and Spain over 108'000 hectares more.

Liechtenstein is the country with the highest organic share of the total farmland in the world

In 2019, organic farmland in Europe constituted 3.3 percent of the total agricultural land and 8.1 percent in the European Union. In Europe (and globally), Liechtenstein had the highest organic share of all farmland (41.0 percent) followed by Austria, the country in the European Union with the highest organic share (26.1 percent). Twelve European countries reported that at least 10 percent of their farmland is organic.

Organic producers on the rise

There were almost 430'000 organic producers in Europe and almost 343'000 in the European Union. The largest numbers were in Turkey (almost 74'545) and Italy (70'561). The number of producers grew by 2.8 percent in Europe and by 5.0 percent in the European Union.

Continued growth of processors and importers

There were almost 82'000 processors in Europe and over 78'000 in the European Union. Over 6'500 importers were counted in Europe and almost 5'800 in the European Union. The country with the largest number of processors was Italy (nearly 22'000), while Germany had the most importers (more than 1'800).

Retail sales reach €45.0 billion

Retail sales in Europe were valued at €45.0 billion (€41.4 billion in the European Union). The largest market was Germany (€12.0 billion). The European Union represents the second largest single market for organic products in the world after the United States (€44.7 billion).

Steady growth of retail sales in 2019

The European market recorded a growth rate of 8.0 percent. Among the key markets, the highest growth was observed in France (13.4 percent). In the decade 2010-2019, the European and European Union markets' value has more than doubled.

European consumers spend more on organic food

In Europe, consumers spent €56 on organic food per person annually (European Union: €84). Per capita, consumer spending on organic food has doubled in the last decade. In 2019, Danish and Swiss consumers spent the most money on organic food (€344 and €338 per capita, respectively).

Denmark has the highest organic market share in the world

Globally, European countries account for the highest shares of organic food sales as a percentage of their respective food markets. Denmark has the highest organic food sales share worldwide, with 12.1 percent in 2019, followed by Switzerland with a share of 10.4 percent and Austria with 9.3 percent.

Quotes

According to Helga Willer, responsible for data collection at FiBL, the numbers for 2019 show a promising growth of the organic area and market. "However, the organic area will have to continue to grow in the coming years in order to reach the European Commission's goal of 25 percent organically farmed land by 2030."

Eduardo Cuoco, Director at IFOAM Organics Europe, continued: "This data shows the European organic market's potential to reach the objective of 25 percent organic land by 2030 put forward in the EU Biodiversity and Farm to Fork strategies. To reach this target the organic sector needs political support at all levels. This includes a good regulatory framework, adequate support under the CAP – 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. We will work closely with all the stakeholders to develop tools to measure and support organic growth.”

Diana Schaack, a market analyst at AMI, adds: “We are already looking forward to the consolidated market data for 2020. Last year the organic market in many countries exhibited accelerated growth due to the pandemic. If this trend sustains, production and processing have to keep pace. The Farm to Fork strategy of the European Union can support this development with respective measures.”

FiBL and AMI conducted the survey on organic farming in Europe. The FiBL data collection was carried out in the framework of the global survey on organic farming supported by the Swiss State Secretariat for Economic Affairs (SECO), the International Trade Centre (ITC), the Coop Sustainability Fund, NürnbergMesse and IFOAM – Organics International.

Further information

Contacts

For questions about organic data:

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For the European organic movement’s position on reaching 25% organic land in Europe by 2030:

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Download, infographics and online databases

- Download “The World of Organic Agriculture 2021”
www.organic-world.net/yearbook/yearbook-2021.html
- Infographics
www.organic-world.net/yearbook/yearbook-2021/infographics.html
- FiBL statistics on organic agriculture worldwide
statistics.fibl.org

Links

- www.fibl.org: Website of FiBL, the Research Institute of Organic Agriculture
- www.ami-informiert.de: Website of AMI, the Agricultural Market Information Company
- www.organicseurope.bio: Website of the European umbrella organisation for organic food and farming
- www.biofach.de: Website of BIOFACH

Programme of the session “The European market for organic food” at the BIOFACH eSPECIAL 2021

Wednesday, 17 February 2021, 5 to 6 pm, Livestream 5

- Dr. Susanne Padel, Thünen-Institut, Germany, Moderator
- Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, Switzerland
- Dorian Fléchet, Agence Bio, France
- Lee Holdstock, Soil Association Ltd., UK
- Diana Schaack, Agrarmarkt Informations-Gesellschaft mbH (AMI), Germany
- Prof. Dr. Raffaele Zanolì, Università Politecnica delle Marche, Italy

More information at <https://biofach.fibl.org/en/biofach-all/biofach-2021.html>.

This media release online

This media release and pictures can be accessed online at <https://www.fibl.org/en/info-centre/media.html>.

About FiBL

The Research Institute of Organic Agriculture FiBL is one of the world’s leading institutes in the field of organic agriculture. FiBL’s strengths lie in its interdisciplinary research, innovations developed jointly with farmers and the food industry, and rapid knowledge transfer. FiBL employs some 300 staff at its various locations.

- Homepage: www.fibl.org
- Video: www.youtube.com/watch?v=U84NrJlORFc

Europe and the European Union: Key indicators 2019

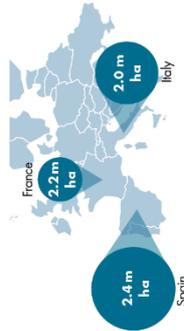
Indicator	Europe	European Union	Top 3 countries Europe
Organic farmland	16.5 million ha	14.6 million ha	Spain (2.35 million ha) France (2.2 million ha) Italy (2.0 million ha)
Organic share of total farmland	3.3 %	8.1 %	Liechtenstein (41.0%) Austria (26.1%) Estonia (22.3%)
Increase in organic farmland 2018-2019	0.92 million ha	0.82 million ha	France (+205'775 ha) Ukraine (+158'880 ha) Spain (+108'441 ha)
Relative increase in organic farmland 2018-2019	5.9%	5.9%	Kosovo (548%) Bosnia and Herzegovina (+89%) Moldova (+62%)
Land use	Arable crops: 7.8 million ha Permanent crops: 1.8 million ha Permanent grassland: 6.5 million ha	Arable crops: 6.6 million ha Permanent crops 1.6 million ha Permanent grassland: 6.4 million ha	
Top arable crop groups	Green fodder: 2.6 million ha Cereals: 3.0 million ha Dry pulses: 0.7 million ha	Green fodder: 2.5 million ha Cereals: 2.4 million ha Dry pulses: 0.5 million ha	Largest arable areas: France (1.3 million ha) Italy (1.0 million ha) Germany (0.7 million ha)
Top permanent crop groups	Olives: 0.6 million ha Grapes: 0.4 million ha Nuts: 0.3 million ha	Olives: 0.5 million ha Grapes: 0.4 million ha Nuts: 0.3 million ha	Largest permanent crop areas: Spain (0.6 million ha) Italy (0.5 million ha) Turkey (0.2 million ha)
Wild collection area	10.5 million ha	7.1 million ha	Finland (4.6 million ha) Romania (1.8 million ha; 2014) Belarus (1.5 million ha)
Producers	430'794	343'858	Turkey: (74'545) Italy (70'561) France (47'196)
Processors	81'719	78'240	Italy (21'940) France (19'311) Germany (16'162)
Importers	6'508	5'747	Germany (1'831) France (662) Switzerland (548)
Retail sales	€45.0 billion	€41.4 billion	Germany (€11'970 million) France (€11'295 million) Italy (€3'625 million)
Growth of retail sales 2018-2019	8.0%	8.0%	France (13.4%) Estonia (13.2%) Belgium (10.4%)
Organic share of total market	No data	No data	Denmark (12.1 %) Switzerland (10.4 %) Austria (9.3 %)
Per capita consumption	€56	€84	Denmark (€344) Switzerland (€338) Luxembourg (€265)

Source: FiBL-AMI survey 2021

Organic Agriculture in Europe 2019

Organic Farmland 2019

Top 3 countries (largest organic area)

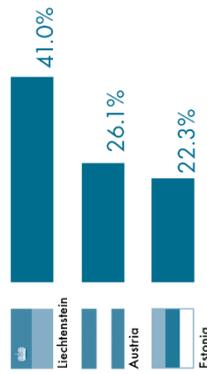


16.5 m ha
Organic farmland in million hectares

+5.9%
From 2018

3.3%
Organic share of total farmland

Organic share of total farmland:
Top 3 countries



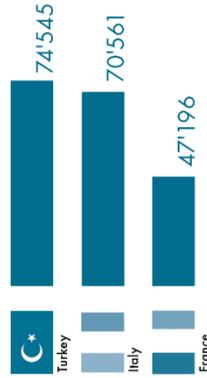
Source: FiBL survey based on national sources
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More information: www.organic-world.net - statistics.fibl.org

Organic Producers & Processors 2019

The number of organic producers is increasing



Number of producers:
Top 3 countries

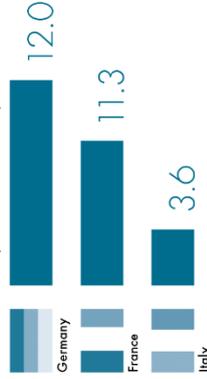


Organic Market 2019

The European market is growing



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



13.4% Organic market growth

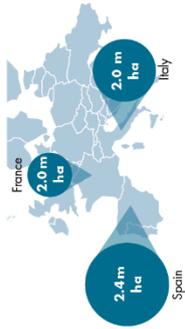
12.1% Market share

344 € Highest per capita spending is in Denmark

Organic Agriculture in the European Union 2019

Organic Farmland 2019

Top 3 countries (largest organic area)



14.6 m ha Organic farmland in million hectares

+5.9% From 2018

8.1% Organic share of total farmland

Organic Producers & Processors 2019

The number of organic producers is increasing

343'858 Organic producers

+5.0% From 2018

78'240 Organic processors

+9.1% From 2018

Organic processors

Organic Market 2019

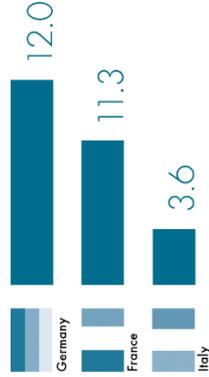
The European market is growing

41.4 EU organic retail sales in billion euros

84 € Per capita spending

+8.0% Organic market growth

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



13.4% Organic market growth

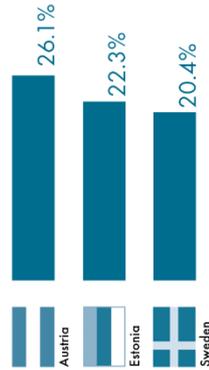
12.1% Market share

344 € Highest per capita spending is in Denmark

Number of producers: Top 3 countries



Organic share of total farmland: Top 3 countries



Source: FiBL survey based on national sources
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EUROPE: ORGANIC FARMLAND 2019



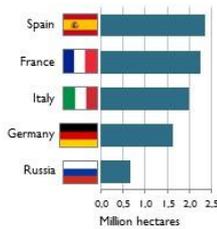
Half of Europe's organic farmland is in 4 countries.



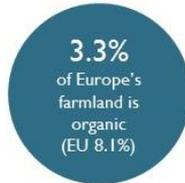
Distribution of organic agricultural land by country 2019



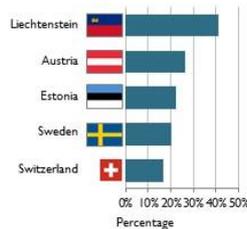
The country with the largest area of organic farmland is in Spain, followed by France and Italy.



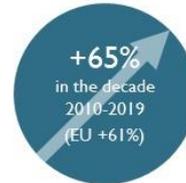
Top 5 countries with the largest areas of organic agricultural land 2019



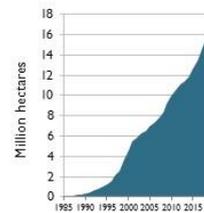
Twelve countries have 10% or more of their agricultural land under organic management.



Top 5 countries, where more than 10 percent of the farmland is organic 2019



From 2018 to 2019 the organic agricultural land grew by 0.9 Million hectares (+5.9%).

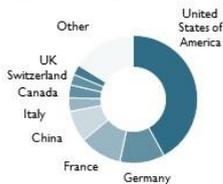


Growth of the organic agricultural land 1985-2019

EUROPE: ORGANIC RETAIL SALES 2019



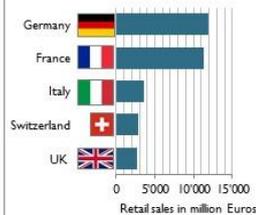
The European Union (41.4 billion €) is the second largest single market after the US (44.7 billion €) and China (8.5 billion €). By region, North America has the lead (48.2 billion €), followed by Europe and Asia (10.9 billion €).



Distribution of retail sales value worldwide by country 2019



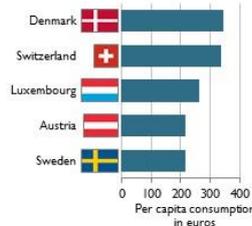
The European countries with the largest markets for organic food are Germany, France (11.3 billion €), Italy (3.6 billion €), and Switzerland (2.9 billion €).



The countries with the largest markets for organic food 2019



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



The countries with the highest per capita consumption of organic food 2019 in Europe (and world)



The country with the highest organic market share is Denmark, followed by Switzerland, Austria, Sweden, and Luxembourg.



The countries with the highest organic shares of the total market 2019 in Europe (and world)