



# The organic market in the European Union – Latest trends

Helga Willer

Civil dialogue group on organic farming

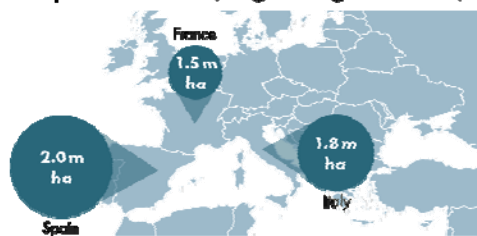
DG Agri, Brussels

November 16, 2018

# Organic Agriculture in the European Union 2016

## Organic Farmland 2016

### Top 3 countries (largest organic area)

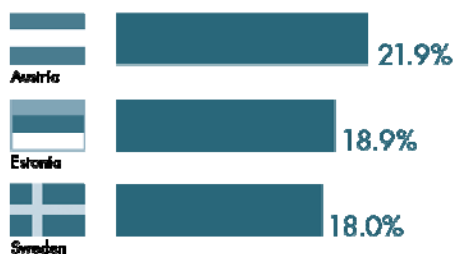


**12.1 m ha** Organic farmland in million hectares

**+8.2%** From 2015

**6.7%** Organic share of total farmland

### Organic share of total farmland: Top 3 countries



## Organic Producers & Processors 2016

### The number of organic producers is increasing

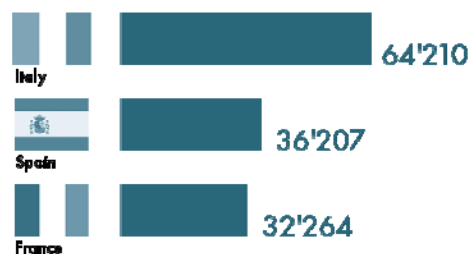
**295'123** Organic producers

**+9.7%** From 2015

**62'652** Organic processors

**+7.8%** From 2015

### Number of producers: Top 3 countries



## Organic Market 2016

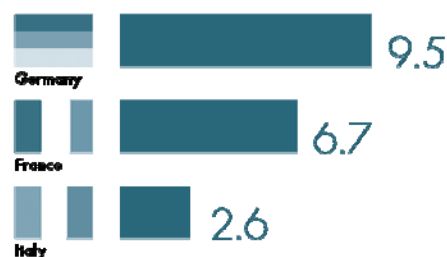
### The European market is growing

**30.7** EU organic retail sales in billion euros

**60.5 €** Per capita spending

**+12%** Organic market growth

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



**21.8%** Organic market growth

**9.7%** Market share

**227 €** Highest per capita spending is in Denmark

Source: FiBL survey based on national sources  
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More information: [www.organic-world.net](http://www.organic-world.net)

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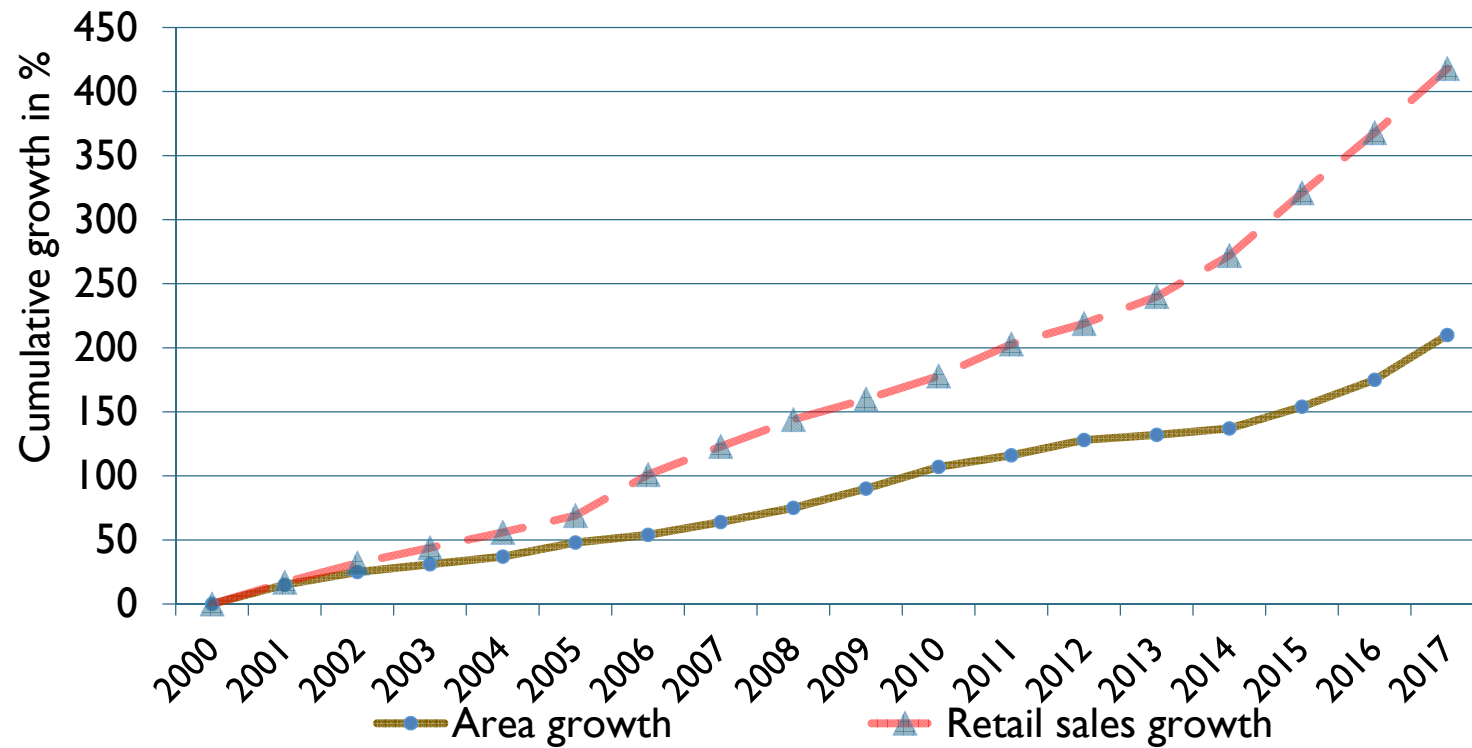
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# Europe: Area growth versus retail sales growth

## Europe: Growth of organic area and retail sales 2000-2017 (prov) compared

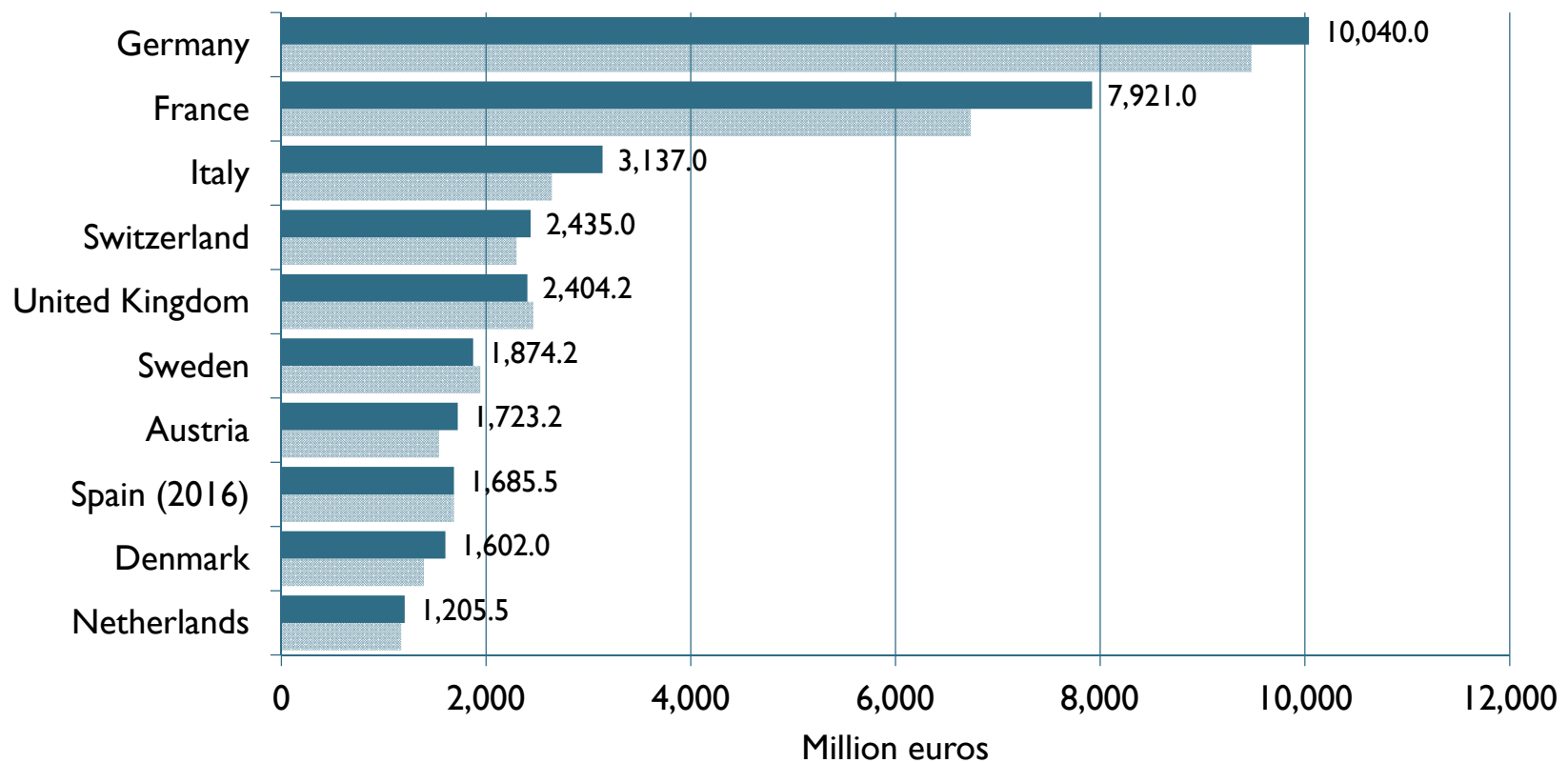
Source: FiBL-AMI surveys 2006-2018



# Organic retail sales: Top ten countries

## Europe: Organic retail sales value by country 2016/2017

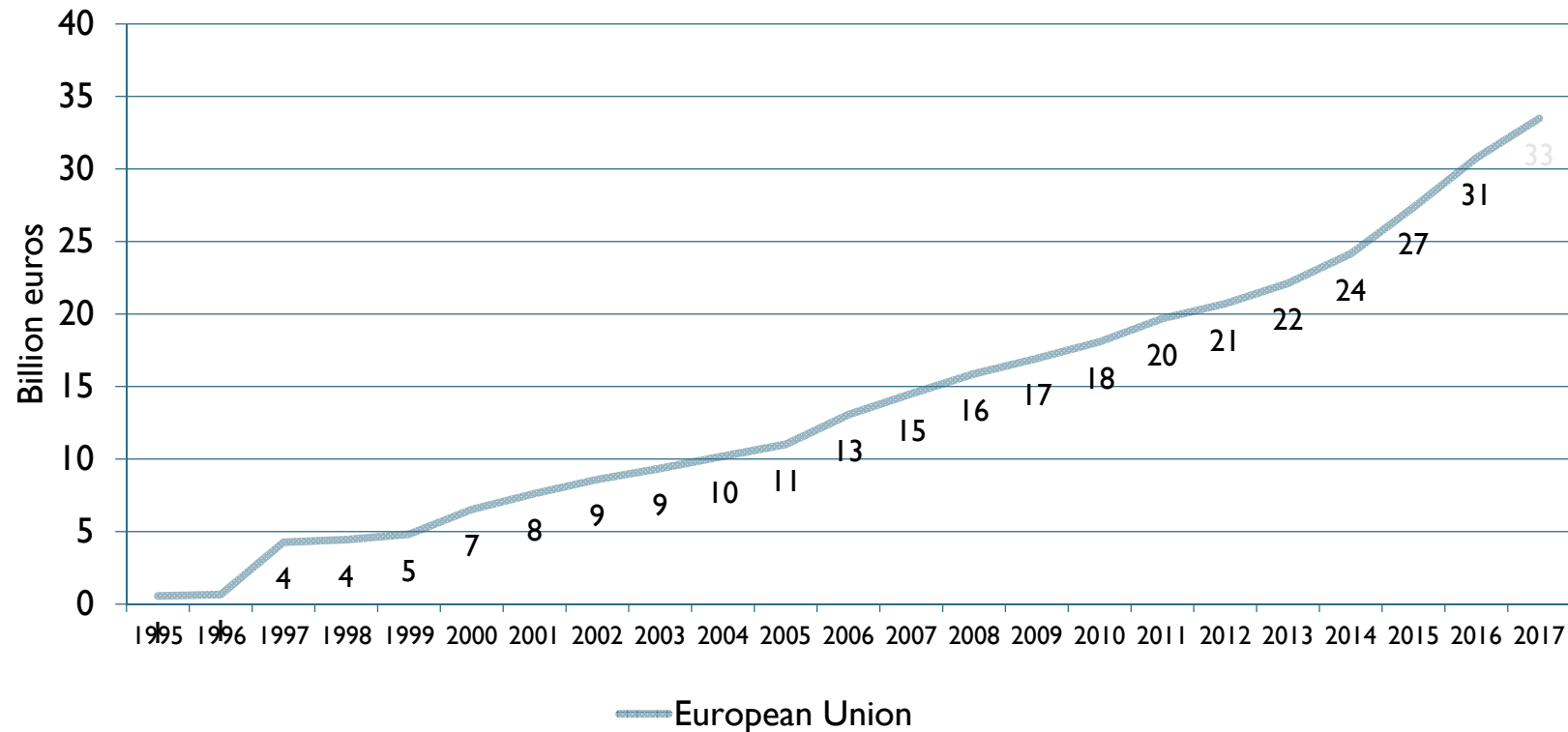
Source: FiBL-AMI survey 2018 based on national data sources



# Growth of the Organic Market

## European Union: Development of retail sales 1995-2017 (prov.)

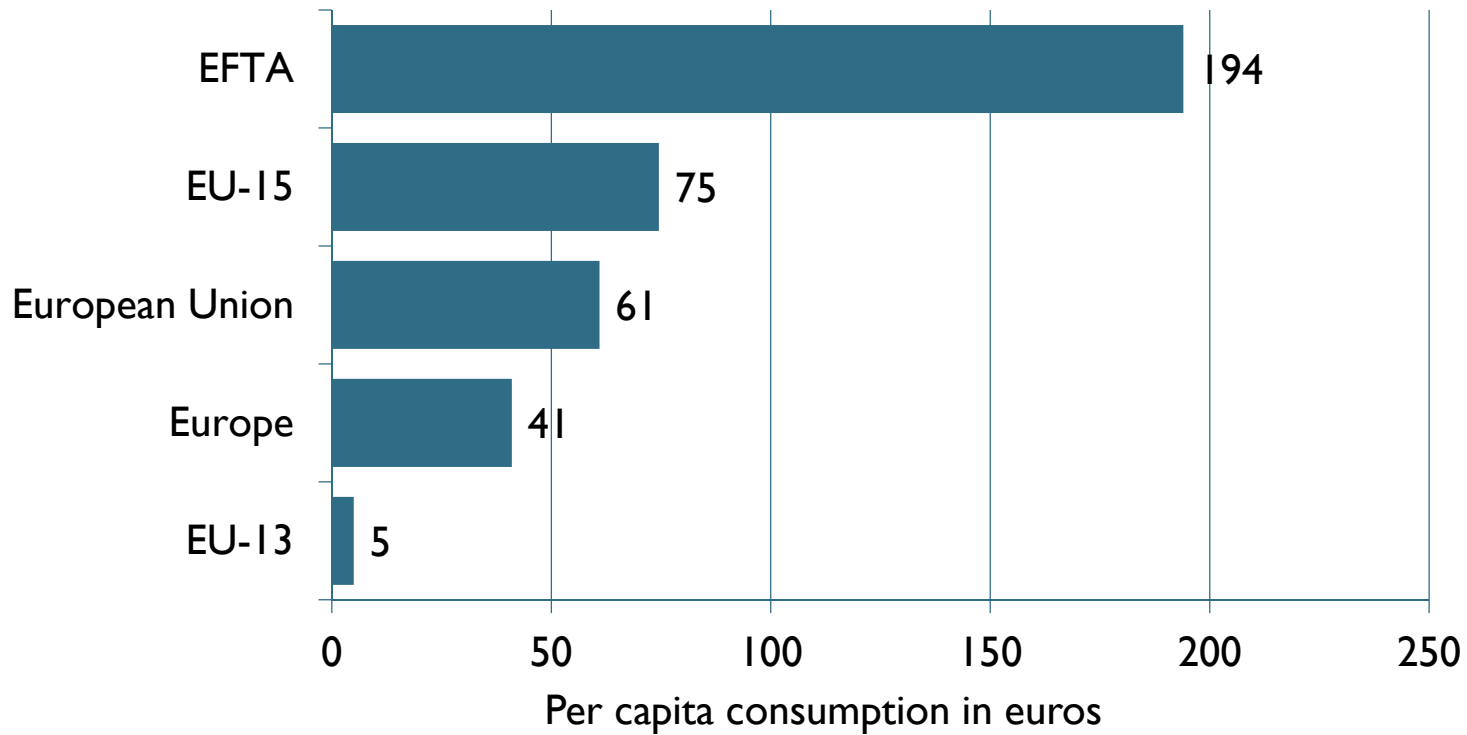
Source: FiBL-AMI Surveys 2006-2018



# Europe: Per capita consumption

## Europe: Per capita consumption 2016 by country group

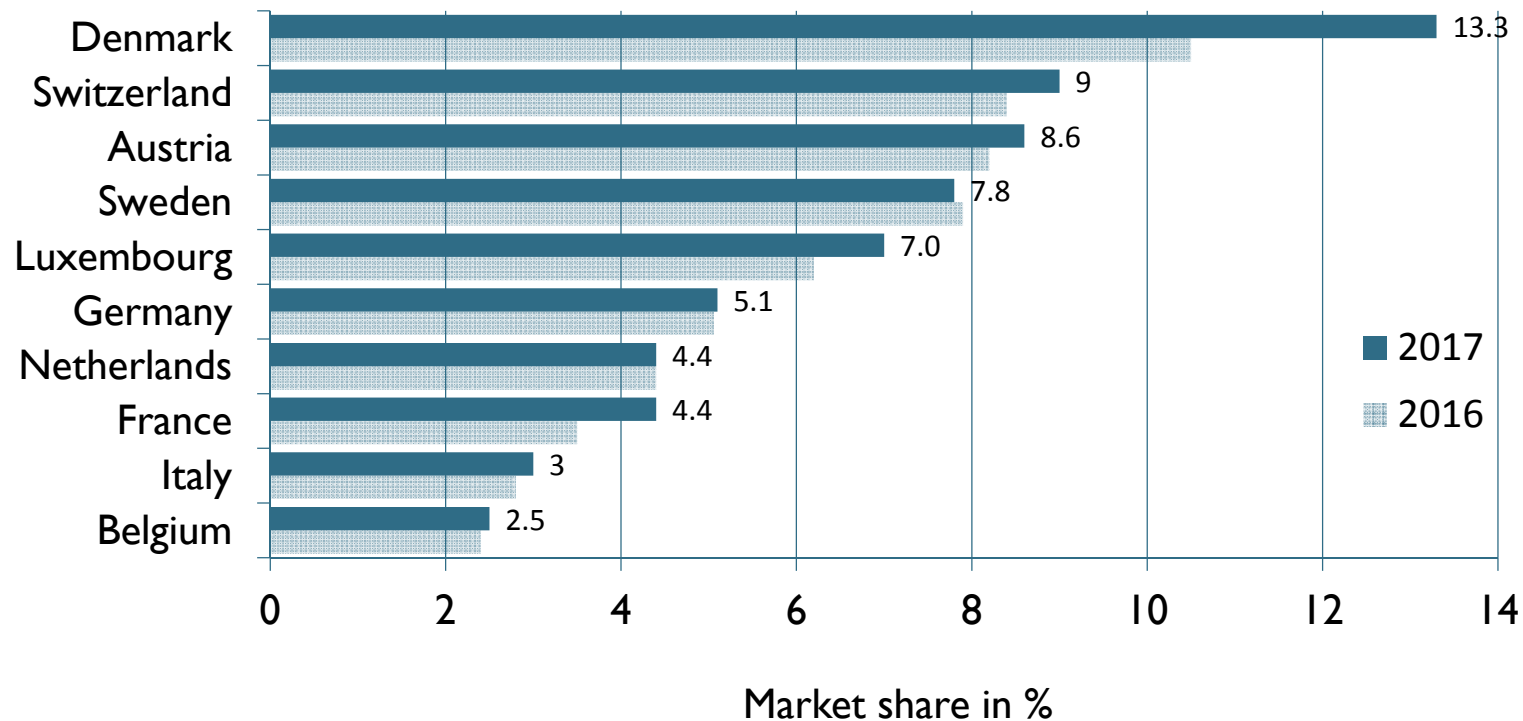
Source: FiBL-AMI survey 2018



# Organic market shares

## Europe: The countries with the highest organic shares of the total market 2016-2017

Source: FiBL-AMI survey 2018, based on national data sources



## Future Policy Award 2018 (FPA) in silver for Denmark's organic action plan

Denmark's Organic Action Plan, which has become a popular policy planning tool in European countries over the last decade, received the Future Policy Award 2018 in Silver.

Almost 80 percent of Danes purchase organic food and today the country has the highest organic market share in the world (13 percent).

“What has made Danish consumers among the most enthusiastic organic consumers [in the world], is that we have done a lot of **consumer information and we have worked strategically with the supermarkets** to place organics as part of their strategy putting more value into food through organics,” Paul Holmbeck, Political Director of ‘Organic Denmark’, said.

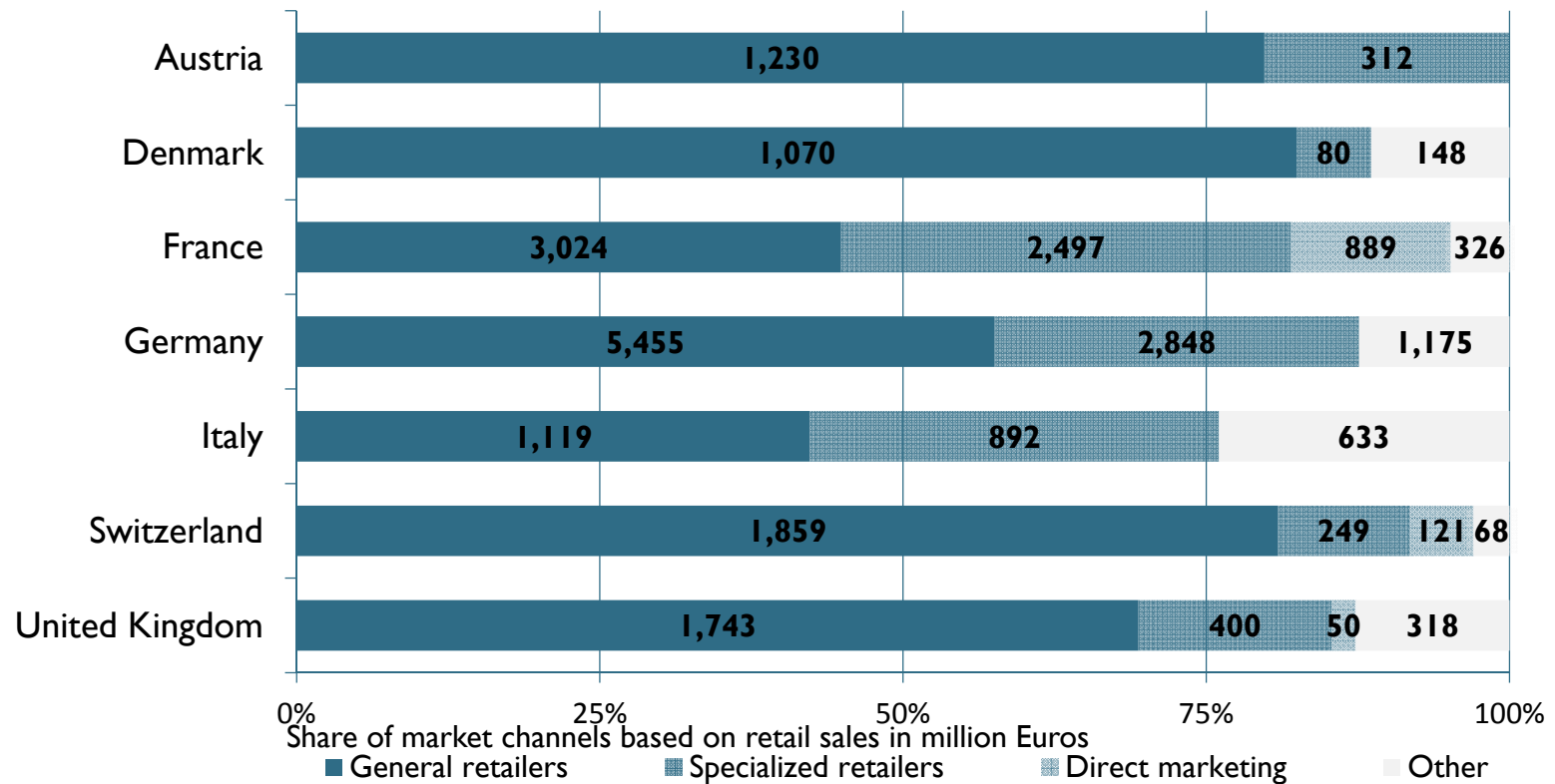
*Source: FAO press release of October 31, 2018, <http://www.fao.org/agroecology/slideshow/news-article/en/c/1157015/>*



# Organic retail sales by channel

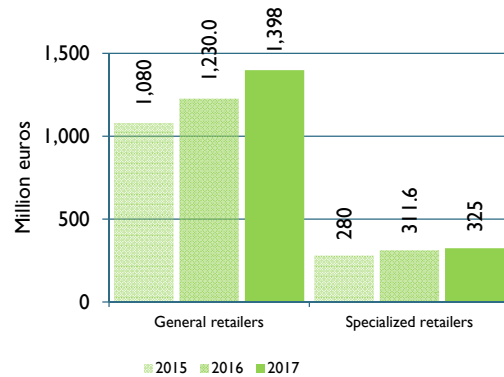
## Organic retail sales by channel

Compiled by FiBL und AMI based on national data sources

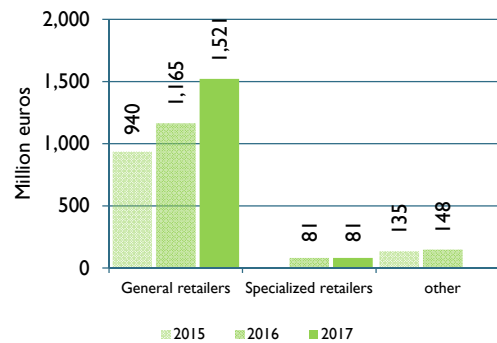


# Organic marketing channels (AT, CH, DE, DK, FR, IT)

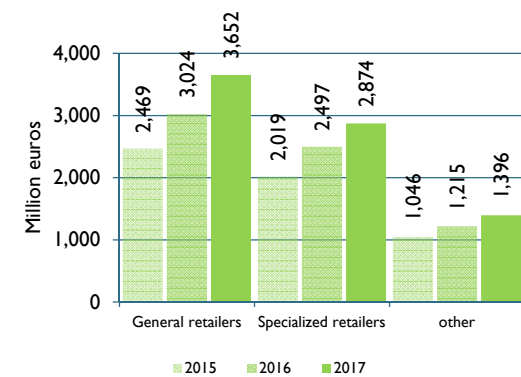
## Austria



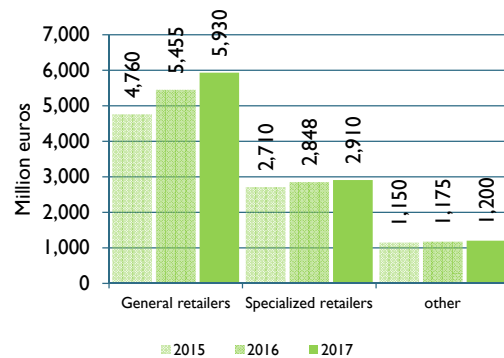
## Denmark



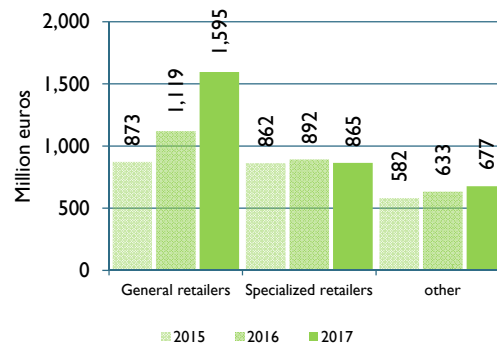
## France



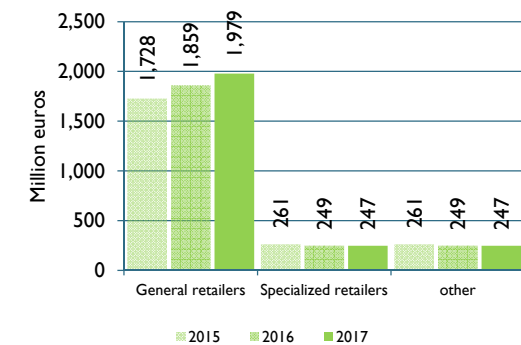
## Germany



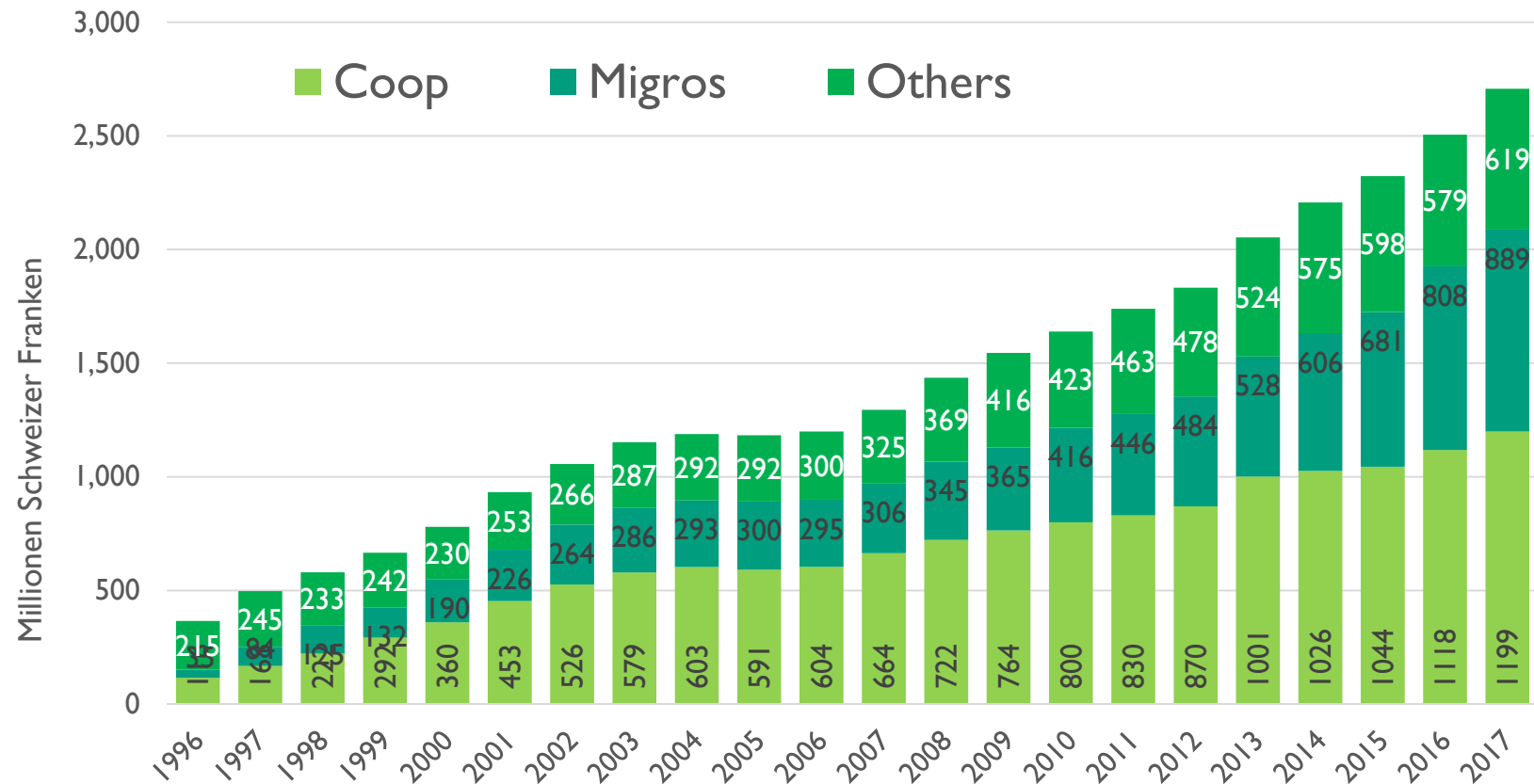
## Italy



## Switzerland

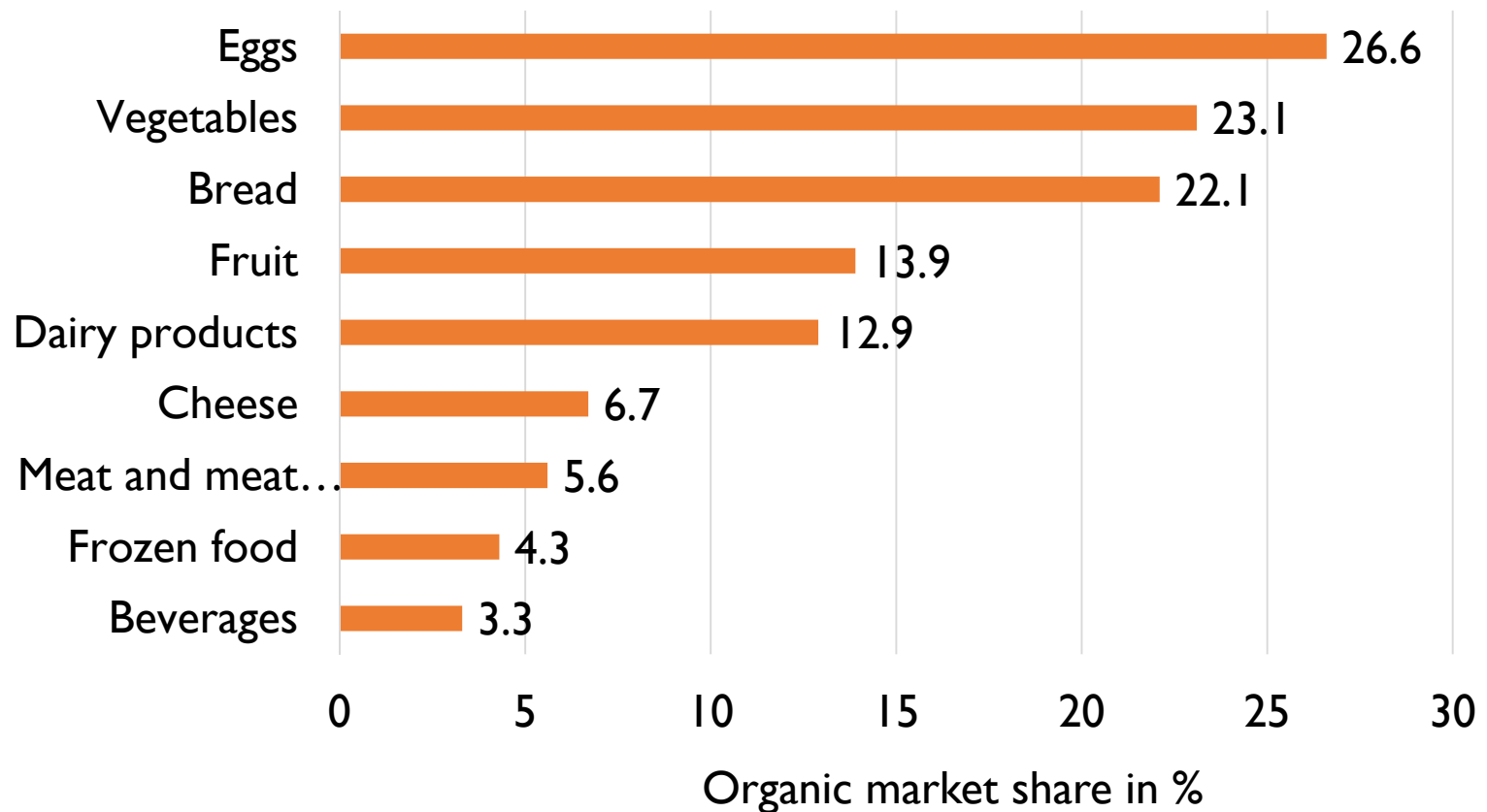


# Switzerland: Development of marketing channels for organic products 1996-2017



Source: Bio Suisse, [www.biosuisse.ch](http://www.biosuisse.ch)

## Switzerland: Organic shares (based on value) for selected products 2017



Quelle: Bio Suisse

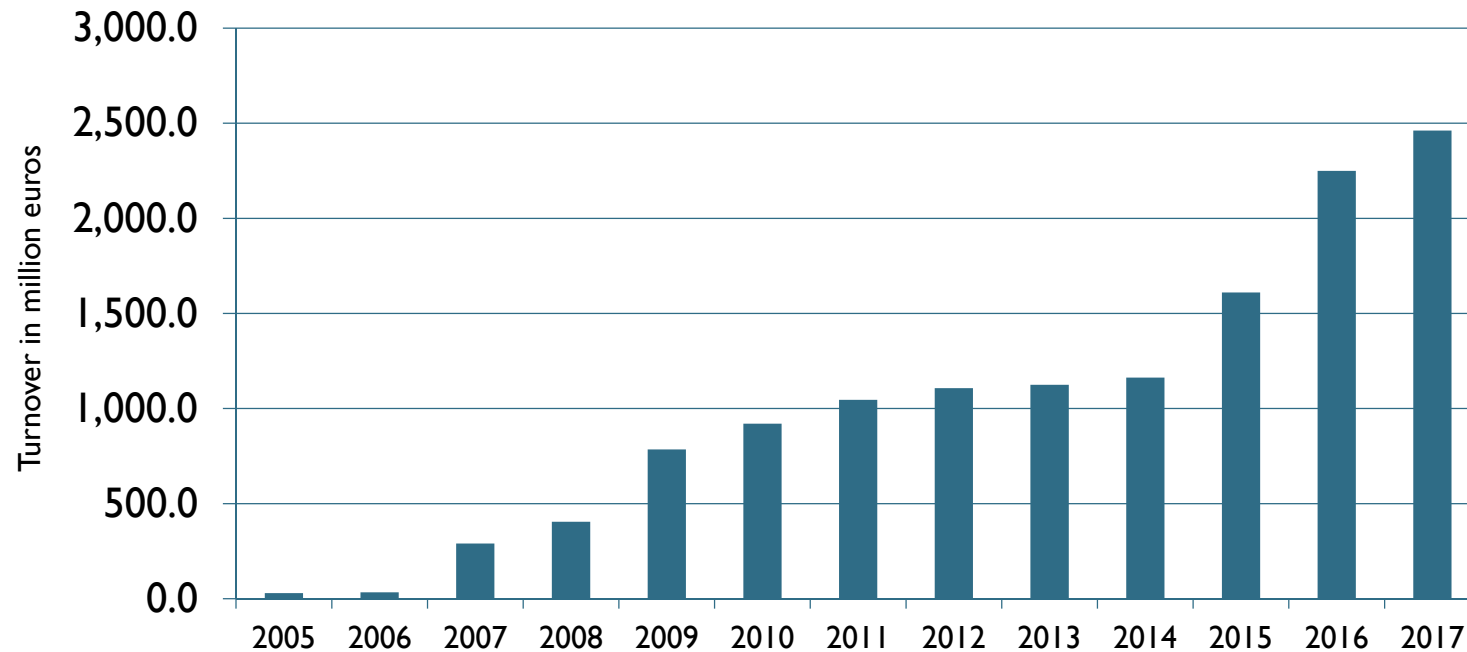
## Current trends

- In many countries general retailers are showing the strongest growth among organic retail marketing channels
- Collaborations between retailers/discounters are becoming more frequent, e.g.
  - Germany: Collaboration Lidl – Bioland
  - Germany: Collaboration Real – Demeter
- Good examples of cooperation between retailers and organic organisations exist
- A differentiation of organic product lines within supermarket chains is currently taking place (several organic lines)
- At the same time, catering channels are gaining importance

# Organic catering sales: Growth

## European Union: Development of organic catering 2005-2017 (prov) (12 countries)

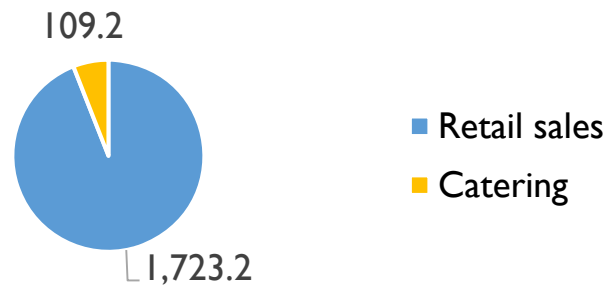
Source: FiBL-AMI survey 2018



# Catering/foodservice sales and their importance for the domestic market

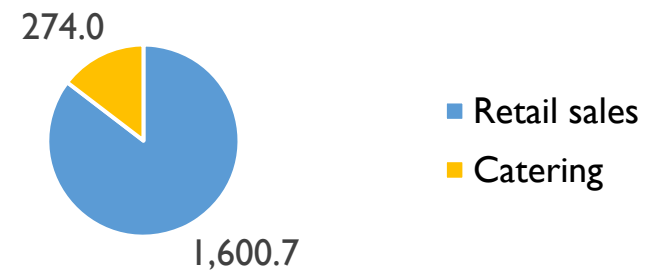
**Austria: Retail and catering sales 2017  
(Mio. Euros)**

Source: AMA



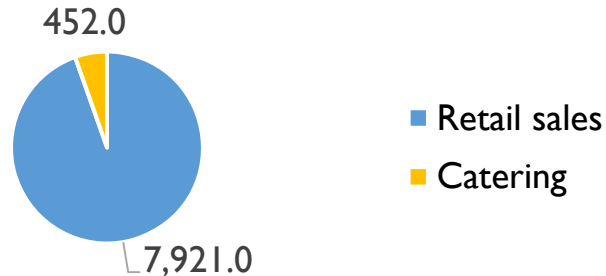
**Denmark: Retail and catering sales 2017  
(Mio. Euros)**

Source: Statistics Denmark



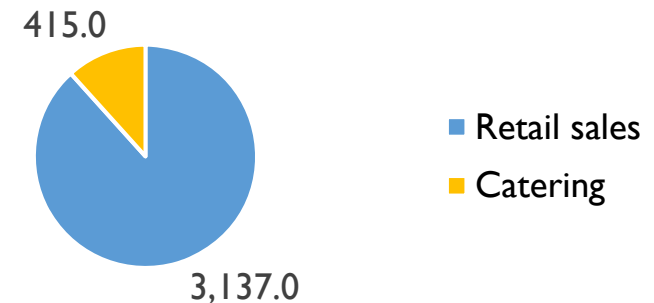
**France: Retail and catering sales 2017  
(Mio. Euros)**

Source: Agence Bio



**Italy: Retail and catering sales 2017 (Mio. Euros)**

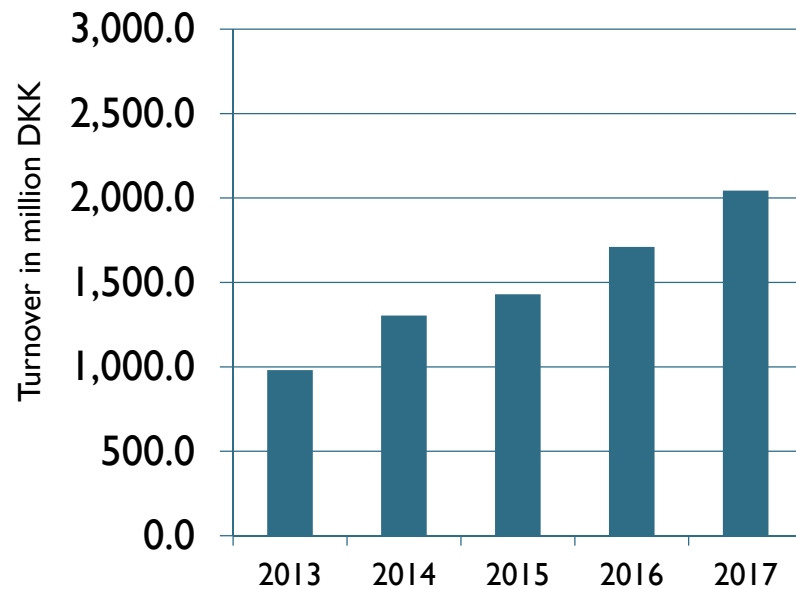
Source: Nomisma



# Denmark Organic food service growth

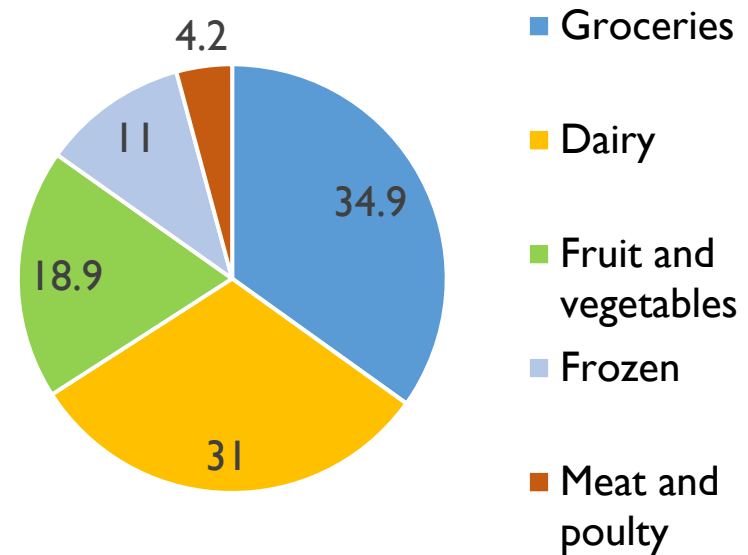
## Denmark: Development of organic catering / food service 2013-2017

Source: Statistics Denmark



## Foodservice by commodity groups 2017

Source: Statistics Denmark





# Conclusions

- The organic market continues to grow at a fast pace in Europe and in the European Union.
- Currently production is growing faster than in the past, thus the potential is there to meet the demand of the ever growing market
- In most countries, general retailers are the most important marketing channel
- In those countries, where they have not been dominant so far, general retailers are gaining ground
- In some countries the supermarkets are beginning to several organic product lines to meet the needs of a broadening consumer base
- Partnerships between producer/sector organisations and supermarkets are essential in order to develop the sector as a whole
- Further marketing channels (out of home consumption ) apart from retailing need to be developed – Denmark is a good example.
- More and better data are needed!

# Acknowledgements

The work presented here is funded by the Swiss State secretariat for Economic Affairs and the International Trade Centre ITC, NürnbergMesse and IFOM – Organics International.

The data collection activities have received funding from the European Union in the framework of the OrganicDataNetwork project (No. 289376), which ran from 2012 to 2014.

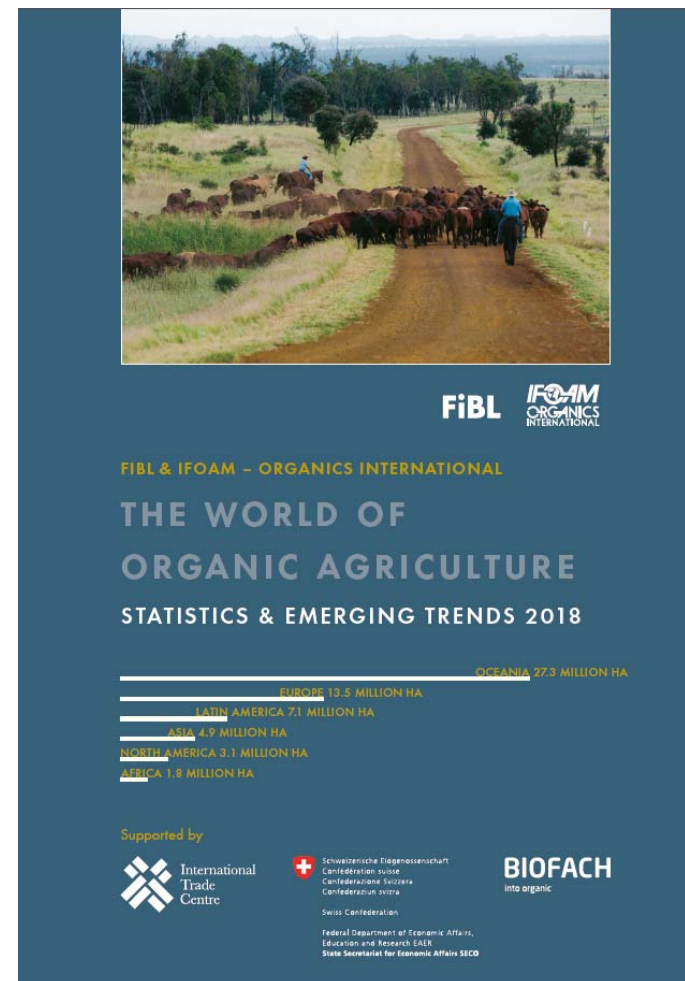
## Resources

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

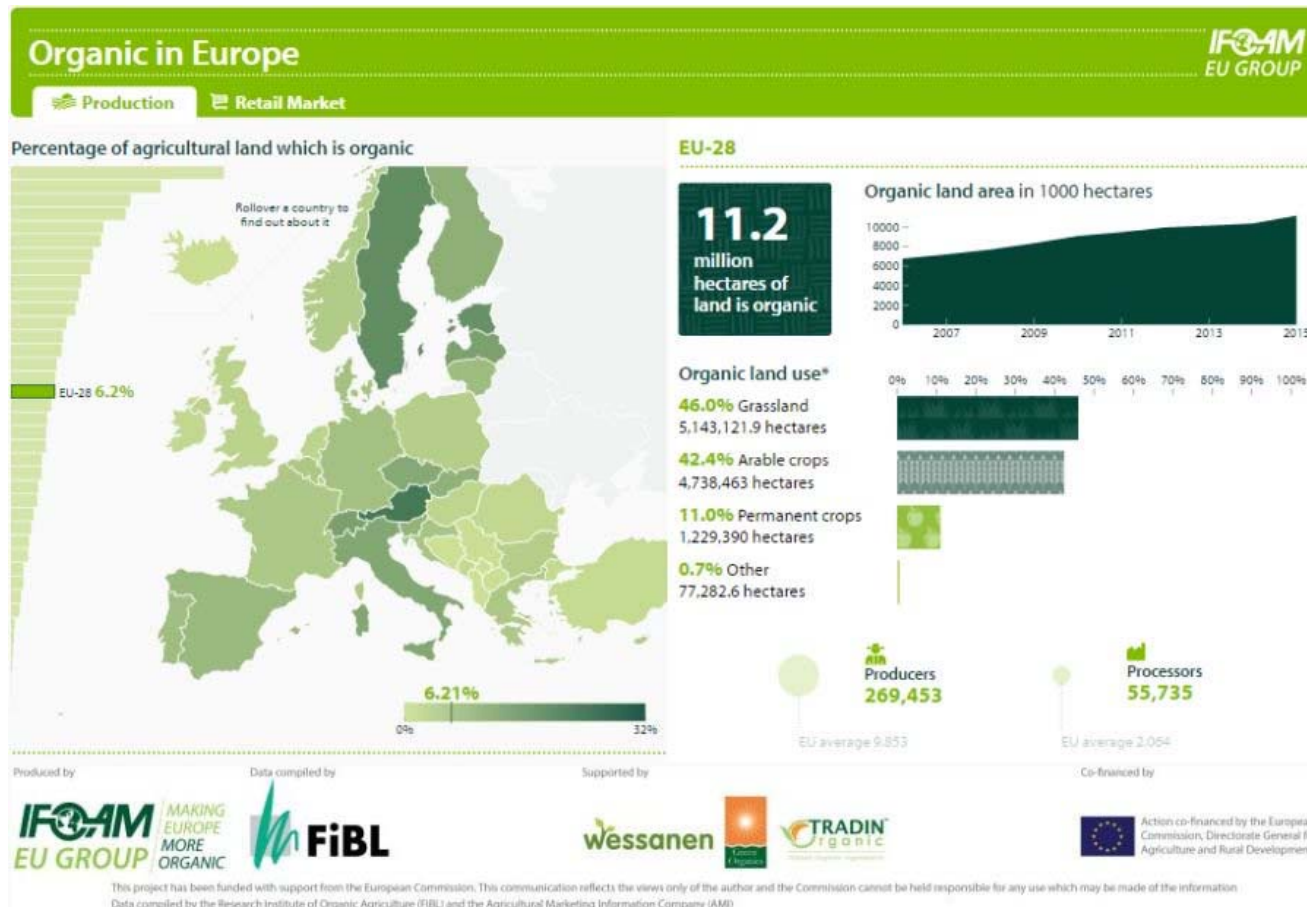
# The World of Organic Agriculture 2018

[www.organic-world.net](http://www.organic-world.net)

- The 19th edition of 'The World of Organic Agriculture', was published by FiBL and IFOAM – Organics International in February 2018.
- Data tables, country and continent reports
- Chapter on European production trends
- Markets, standards, policy support
- [www.organic-world.net](http://www.organic-world.net)
- Supported by **SECO, ITC, NürnbergMesse** and **IFOAM – Organics International**



# Interactive map <http://www.ifoam-eu.org/en/organic-europe>



# Presentations at [www.organic-world.net](http://www.organic-world.net)

## Organic World

Global organic farming statistics and news

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### The World of Organic Agriculture at BIOFACH 2018

**The session on global organic farming and market trends will take place from 4 pm to 4.45 pm, on February 14, 2018 at BIOFACH, NürnbergMesse, Nürnberg, Germany.**

(05/01/2018) At this session, the latest data on organic agriculture worldwide, regulations and organic markets will be presented and the 19th edition of The World of Organic Agriculture, the yearbook on global organic agriculture, will be launched.

#### Presenter

> Markus Arbenz, Executive Director, IFOAM - Organics International, Germany

#### Speakers

- > Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, Switzerland
- > Julia Lernoud, Research Institute of Organic Agriculture FiBL, Switzerland
- > Beate Huber, Research Institute of Organic Agriculture FiBL, Switzerland
- > Amarjit Sahota, President Ecovia Intelligence, UK
- > Barbara Jäggin, SECO, Swiss Cooperation Office, Switzerland

#### Further information

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##### Link

> BIOFACH.de: [www.biofach.de](http://www.biofach.de): [The World of Organic Agriculture at BIOFACH 2018](http://www.biofach.de/en/organic-world)

### The World of Organic Agriculture 2018



[The World of Organic Agriculture 2018](http://www.fibl.org/en/publications/organic-world)

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**FiBL** **FiBL Statistics** @FiBLStatistics · 1 feb.  
Organic arable crop area grew to 6 million hectares in 2016 (+7%). More information on organic farming in Europe is available in the 2018 edition of the [#WorldofOrganic](https://worldoforganic.org/), European data launch @BioFachVivaneess [organic-world.net/index/news-org...](https://worldoforganic.org/)

Traducir del inglés

**Europe: Growth of area by land use type 2004-2016**  
Source: FiBL-AMI survey 2004-2016

Year	Total Area (Million hectares)	Organic Area (Million hectares)
2004	2.2	0.5
2005	3.0	0.7
2006	3.0	0.7
2007	3.3	0.7
2008	3.3	0.7
2009	3.4	0.7
2010	3.9	1.0
2011	4.1	1.0
2012	4.5	1.0
2013	4.8	1.1
2014	4.9	1.3
2015	5.0	1.4
2016	5.4	1.5

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