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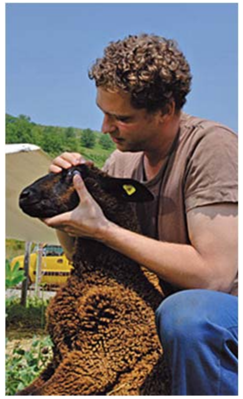
EXCELLENCE FOR SUSTAINABILITY



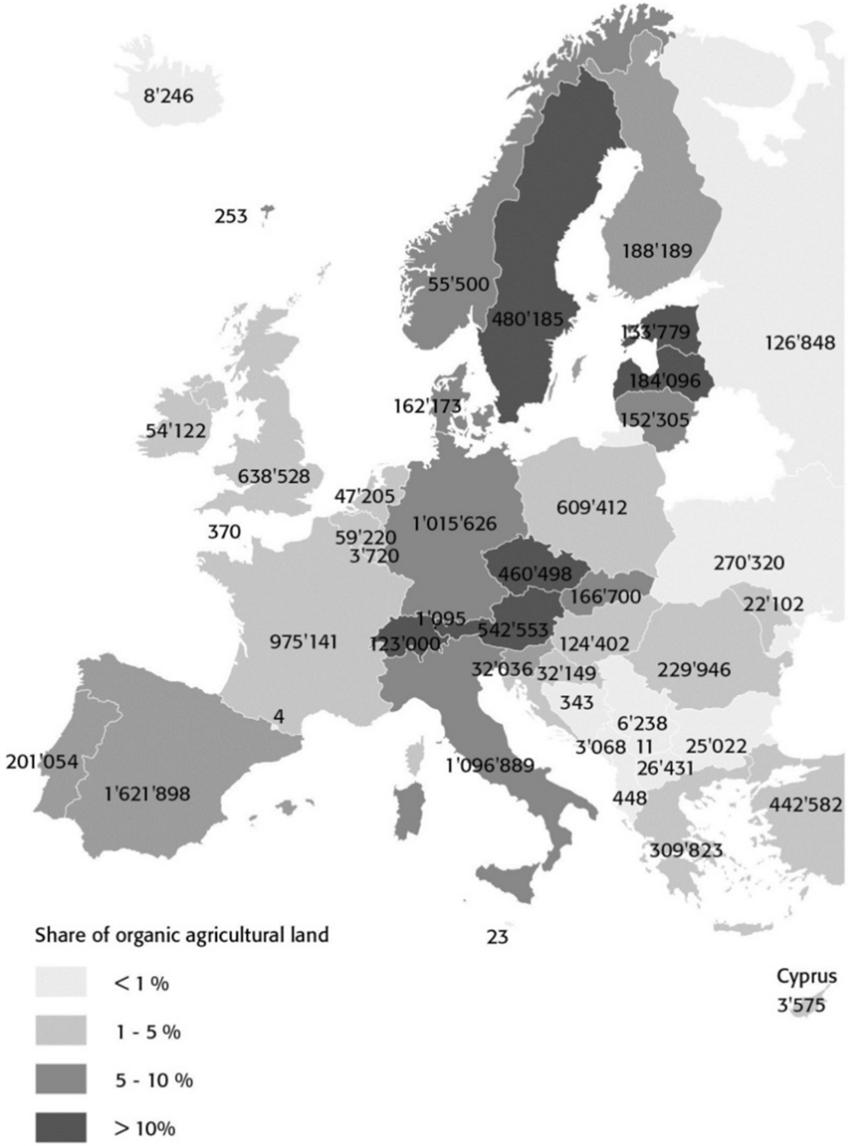



The European Market for Organic Food 2011

Helga Willer, Julia Lernoud, Research Institute of Organic Agriculture (FiBL) Frick, Switzerland and Diana Schaack, Agricultural Information Company (AMI), Bonn, Germany

BioFach Congress 2013, 14.2.2013

Europe: Organic agricultural land by country 2011



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Source: FiBL Survey 2013

Europe: Organic agricultural land by country 2011

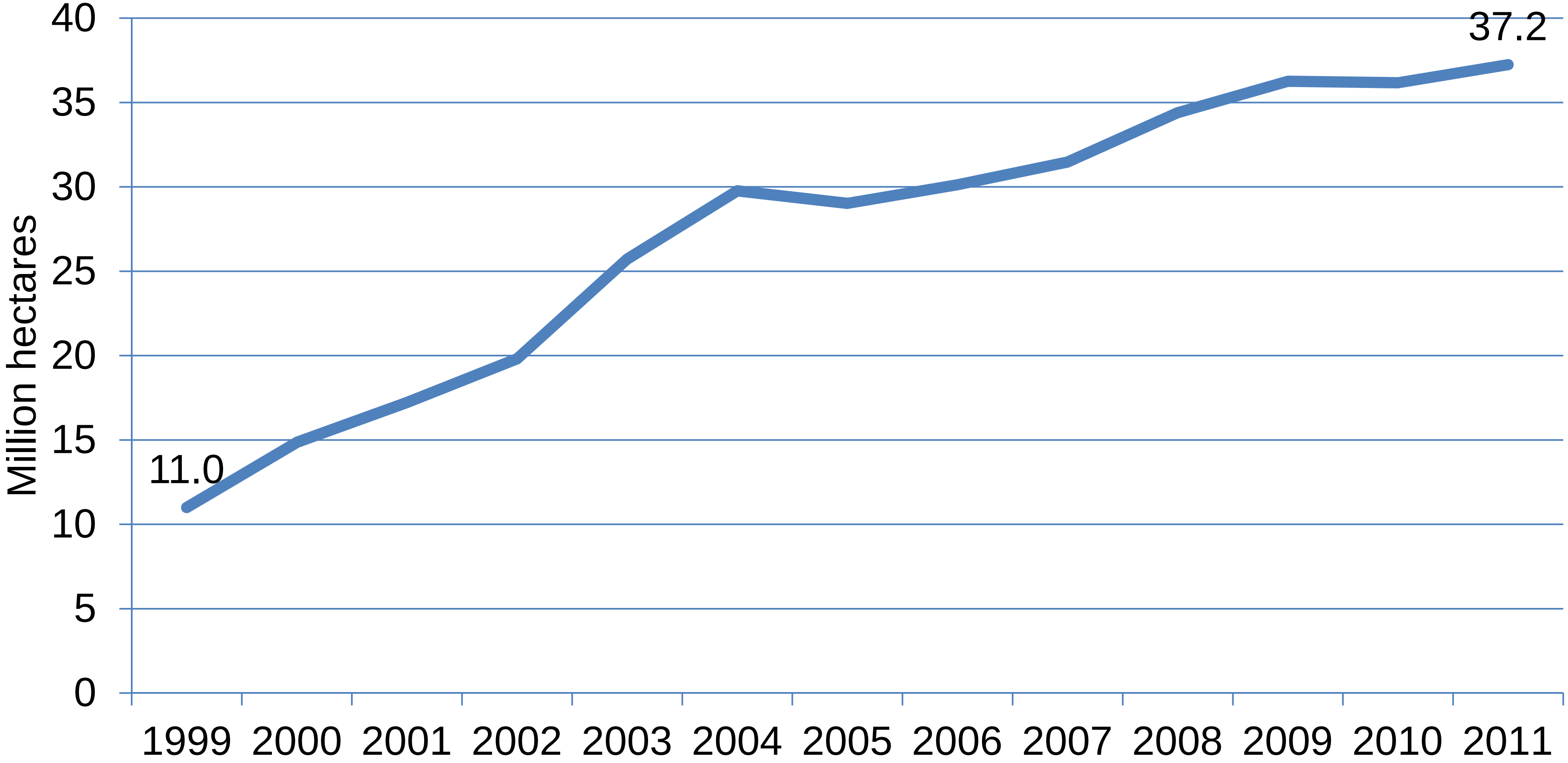
- 10.6 million hectares of agricultural land are organic (EU 9.5 million).
- This constitutes 2.2 percent of the agricultural land in Europe (EU 5.4 percent).
- The organic agricultural land increased by 0.6 million hectares or six percent in 2011 (EU: 0.5 million; +6 percent).
- Almost 290’000 producers were reported (EU 240’000).

Source: FiBL Survey 2013

Organic market in Europe: Key data/indicators 2011

- The market was 21.5 billion euros, an increase of nine percent compared with 2010 (EU 19.7 billion).
- The largest market for organic products in 2011 was Germany with a turnover of 6.6 billion euros, followed by France (3'756 million euros) and the UK (1'882 million euros).
- As a portion of the total market share, the highest levels were reached in Denmark, Austria and Switzerland, with five percent or more for organic products.
- The highest per capita spending is also in these countries and in Luxembourg.

Growth of the organic agricultural land worldwide 1999-2011



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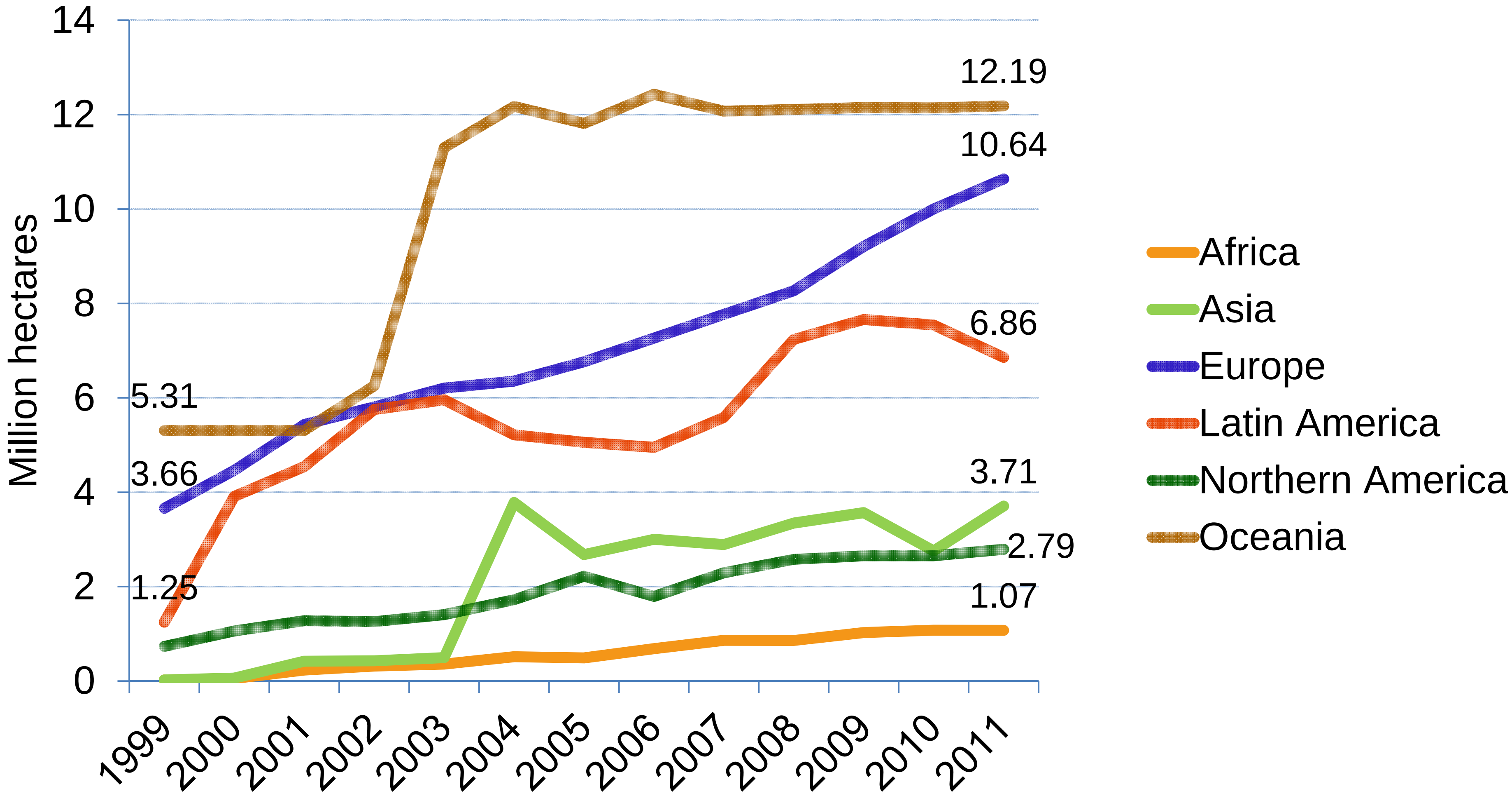
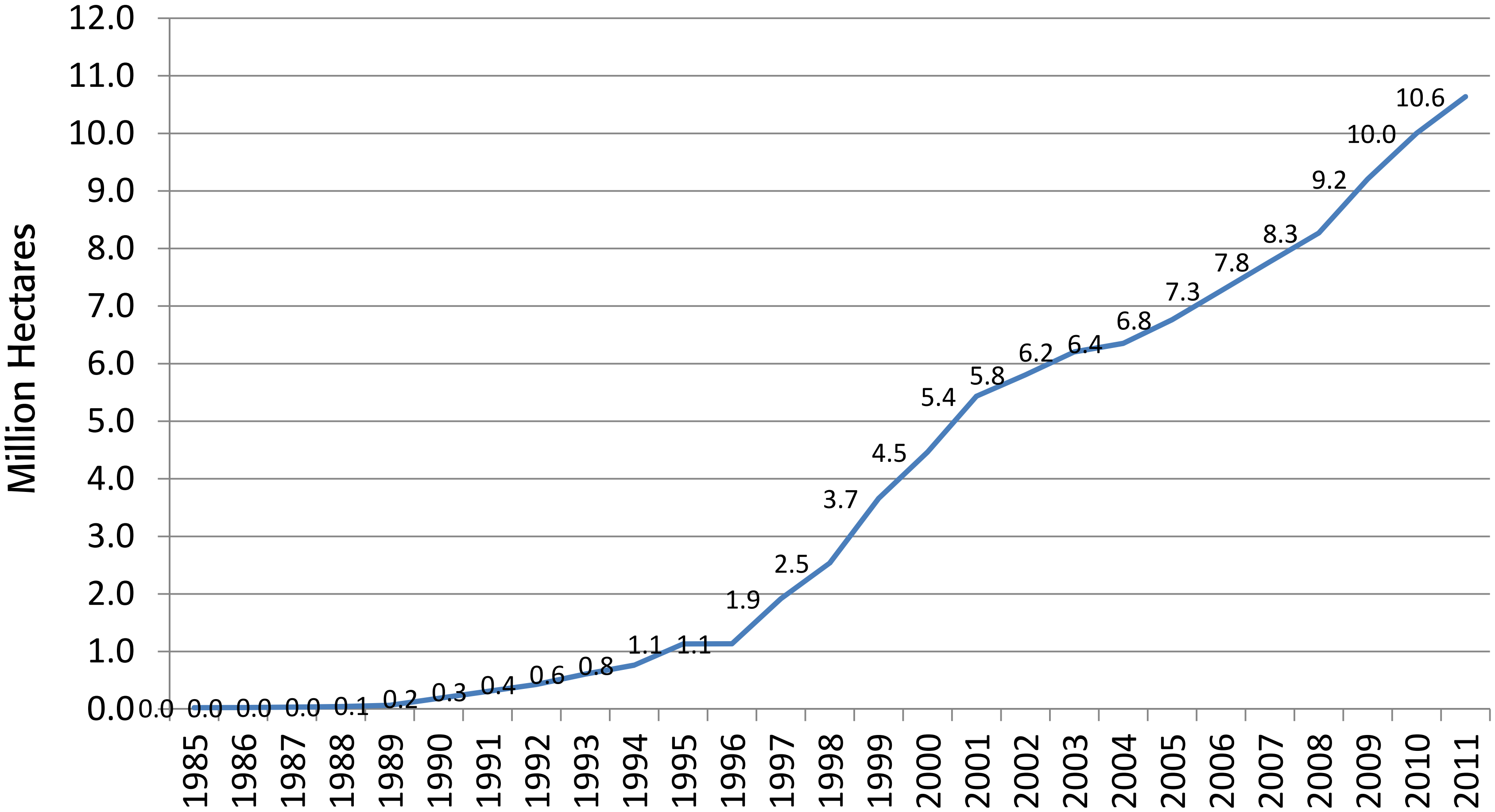
Source: FiBL-IFOAM-SOEL Surveys 2000-2013,based on data from governments, the private sector and certifiers.

Development of organic agricultural land in the regions 1999-2011



Source: FiBL-IFOAM-SOEL Surveys 2000-2013,based on data from governments, the private sector and certifiers.

Europe: Development of organic agricultural land 1985-2011



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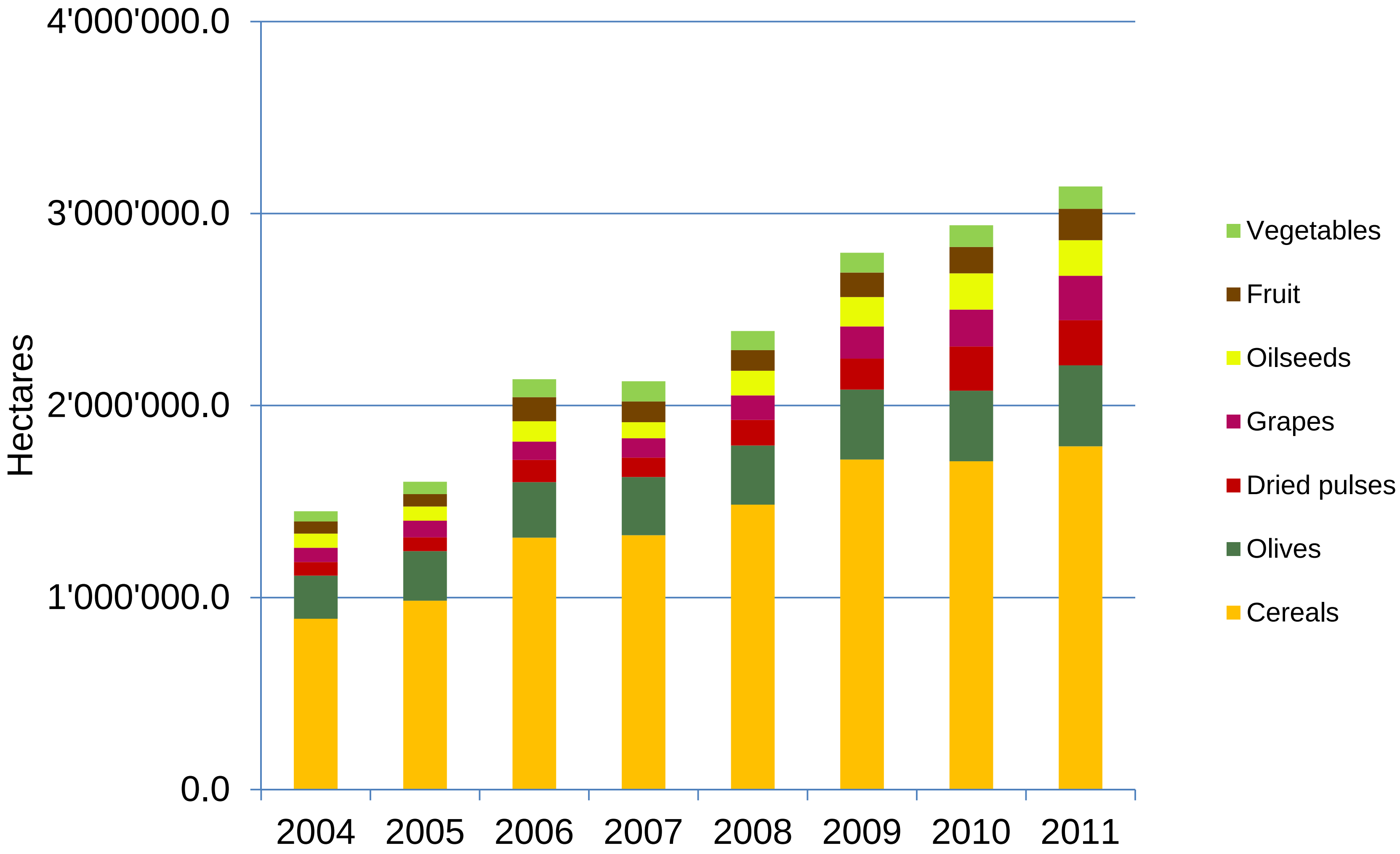
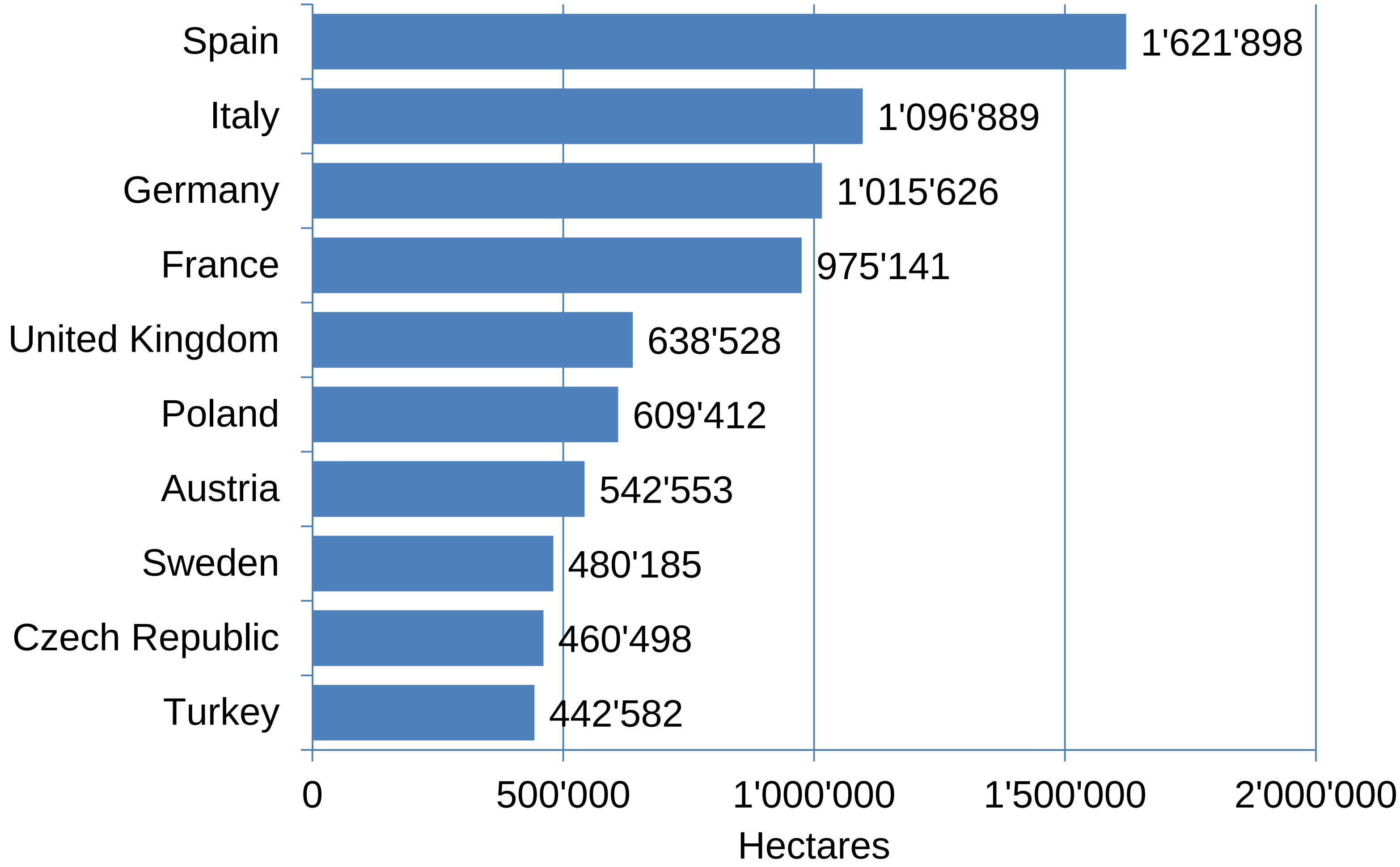
Source: Nic Lampkin, FiBL, 1985-2013, ,based on data from governments, Eurostatt, the private sector and certifiers.

Development of organic crops/crop groups 2004-2011



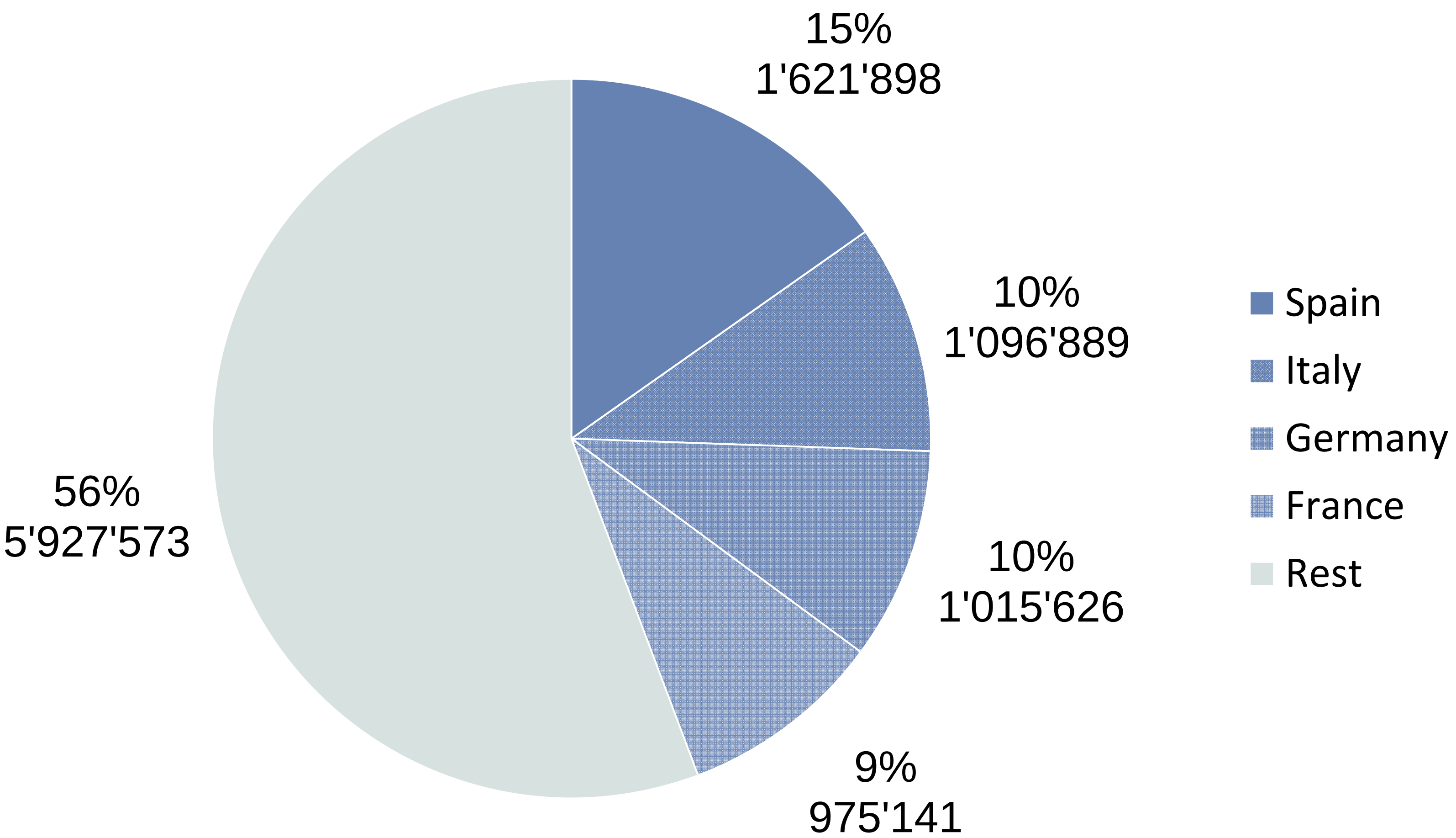
Source: FiBL Survey 2006-2013

Europe: The ten countries with the most organic agricultural land 2011



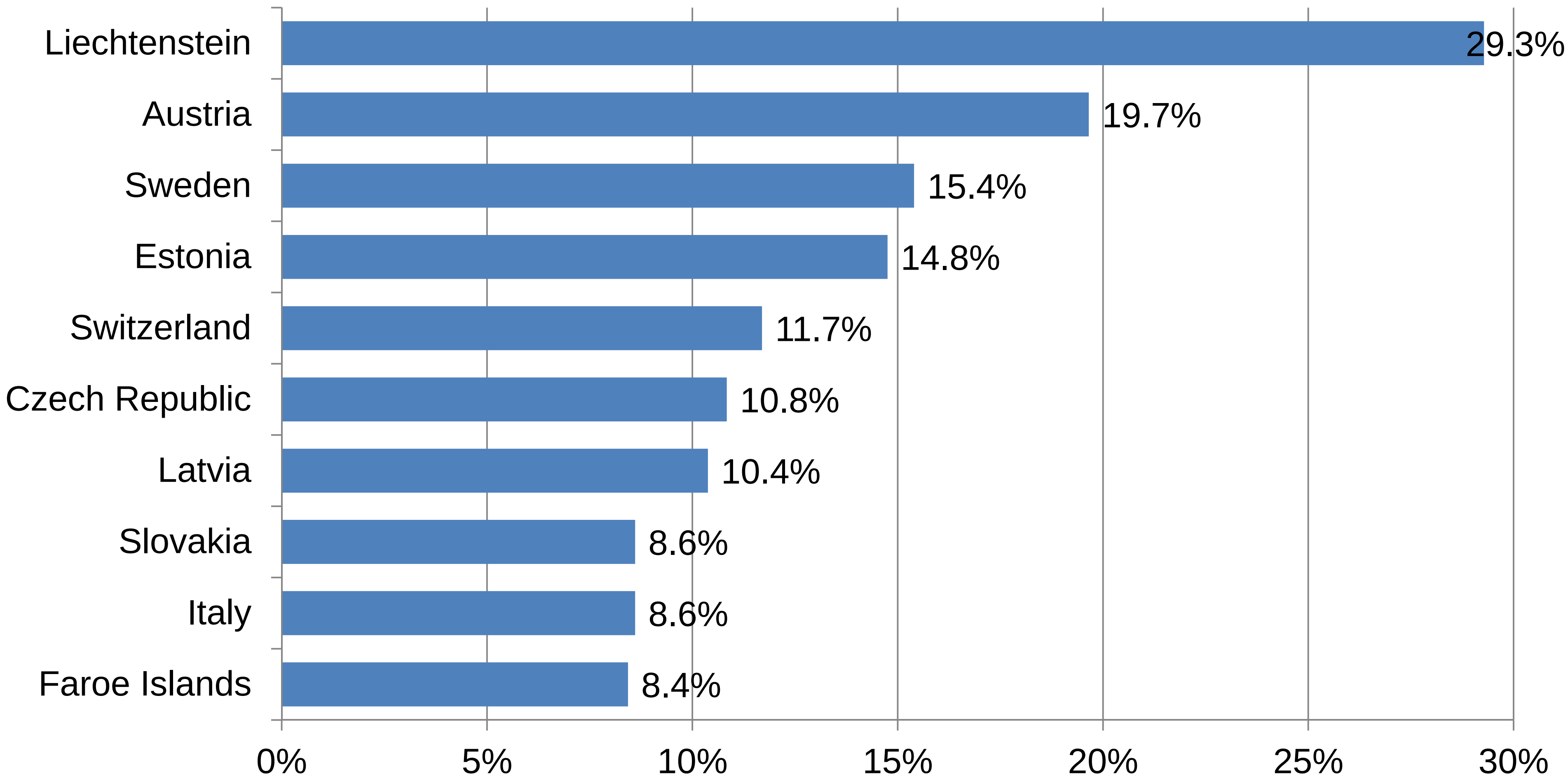
FiBL-IFOAM Survey 2013, based on data from governments, the private sector and certifiers

Europe: Distribution of organically managed agricultural land by country 2011(Total: 10.6 million hectares)



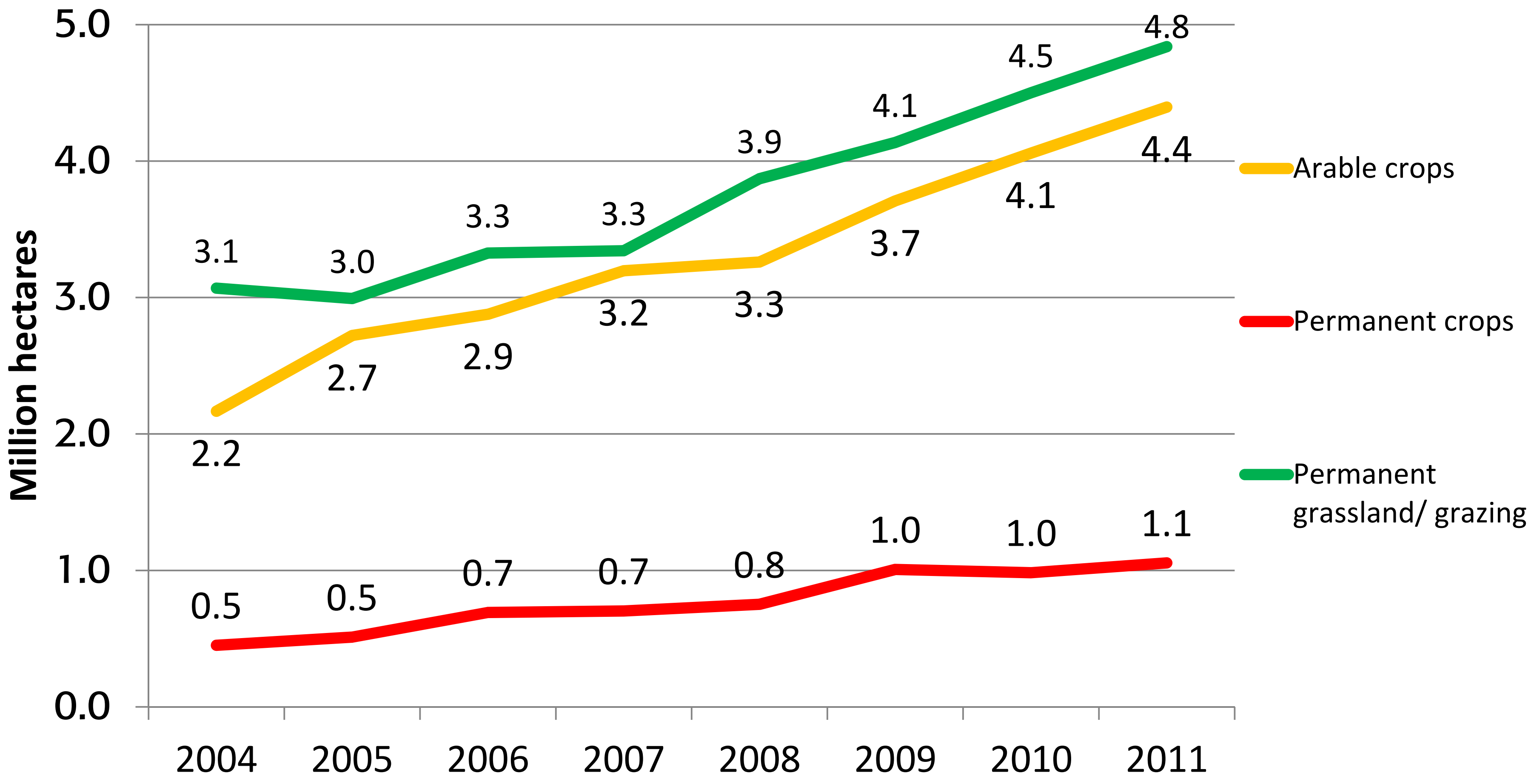
FiBL-IFOAM survey 2013

Europe: The ten countries with the highest shares of organic agricultural land 2011

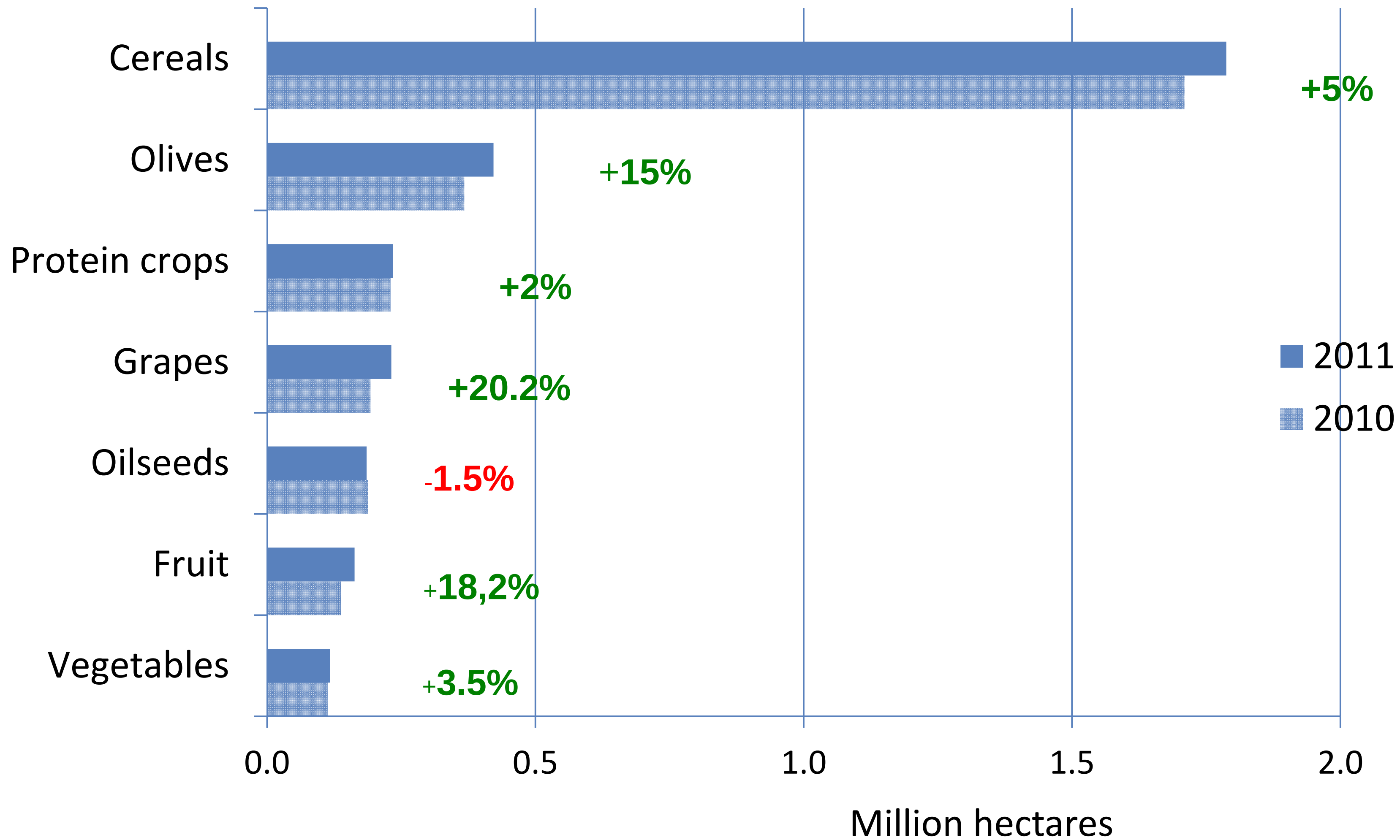


Source: FiBL Survey 2013, based on national sources

Development of organic land use types in Europe 2004-2011



Development of selected crops/crop groups in Europe



Source: FiBL-IFOAM Survey 2013

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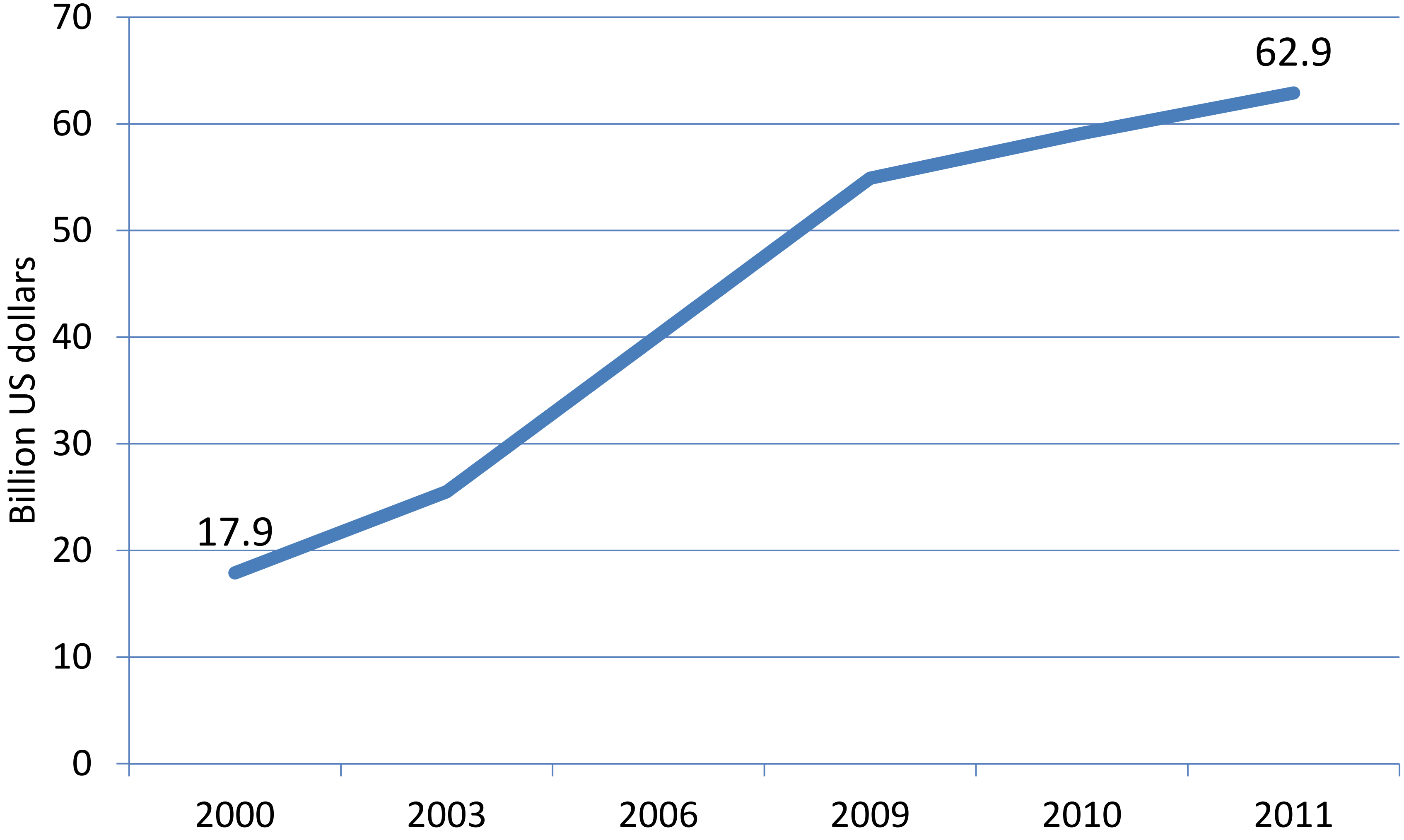
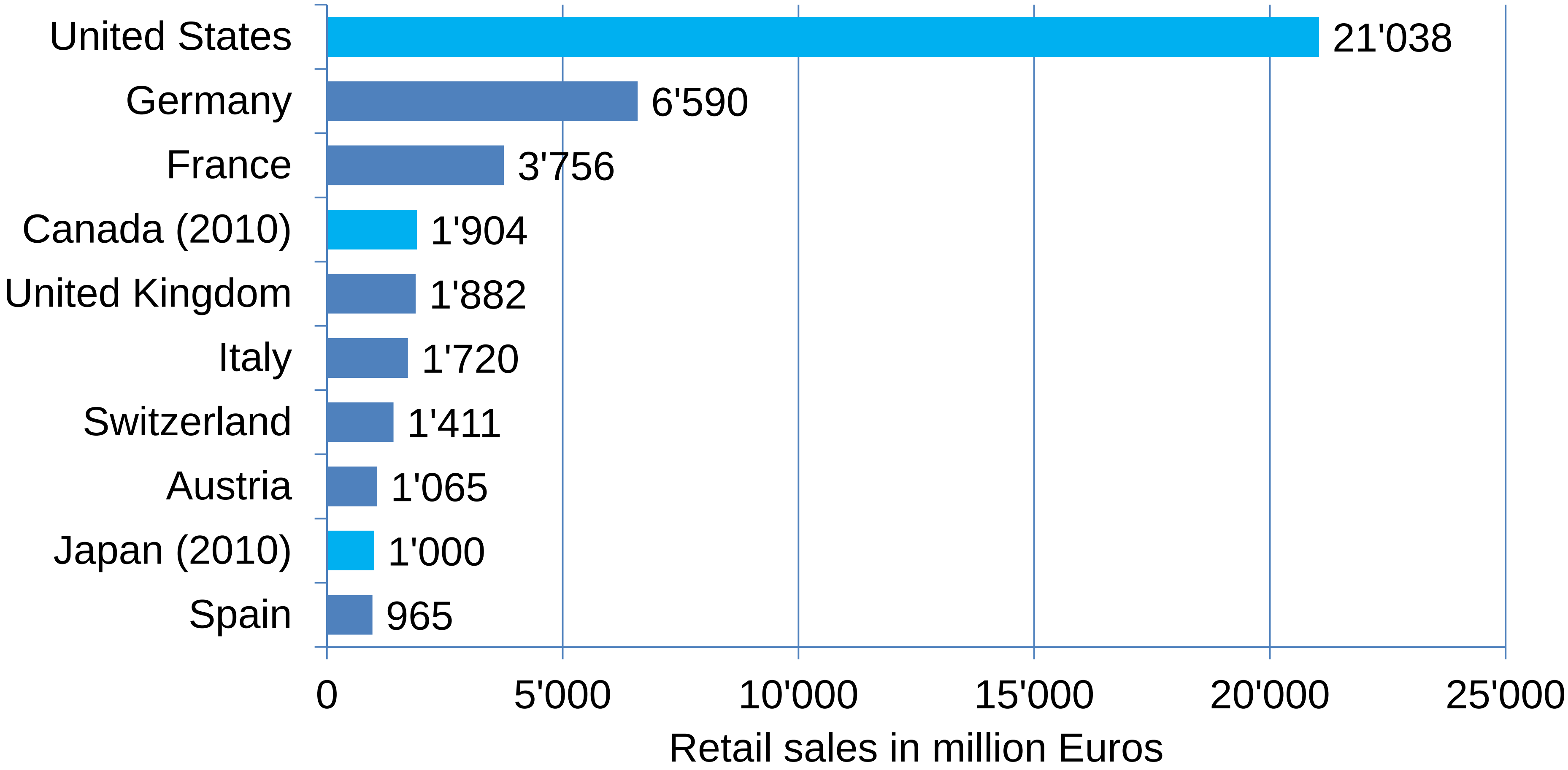
Development of the global market for organic food 2000-2011



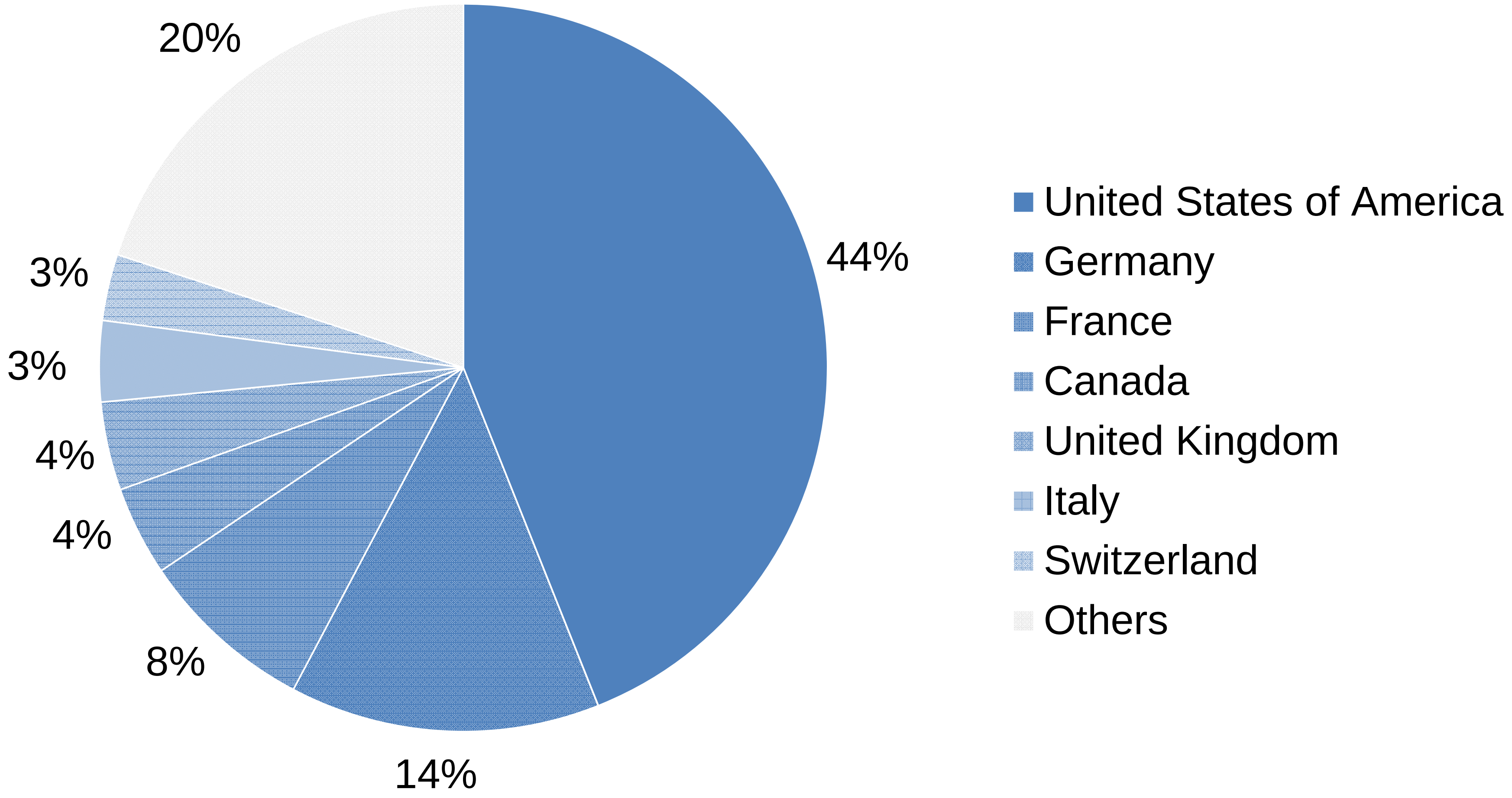
Source: Organic Monitor, various years

The ten countries with the largest organic markets 2011



Source: FiBL-AMI-IFOAM Survey 2013, based on data from governments, the private sector and market research companies.

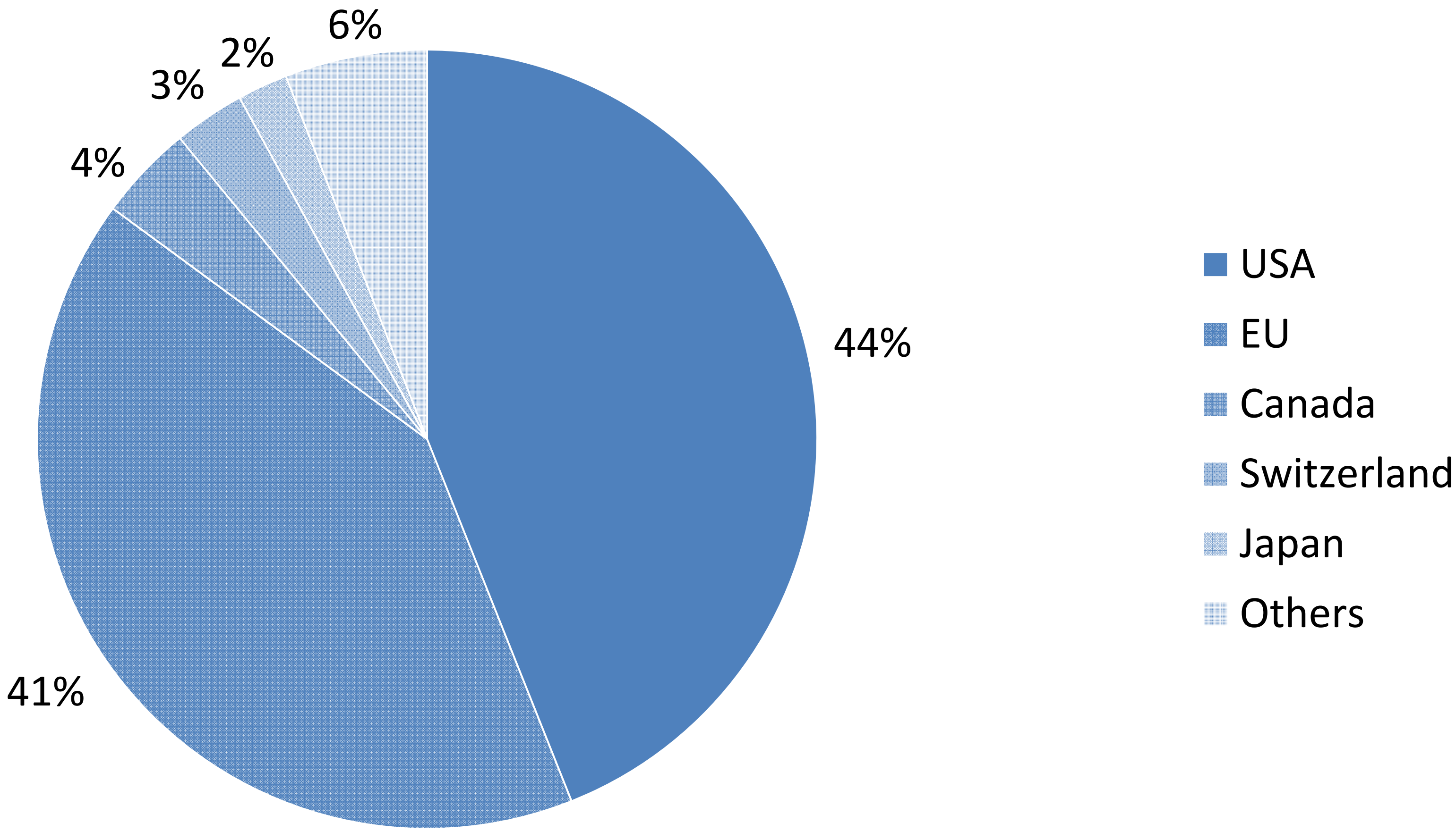
Distribution of organic sales by country 2011



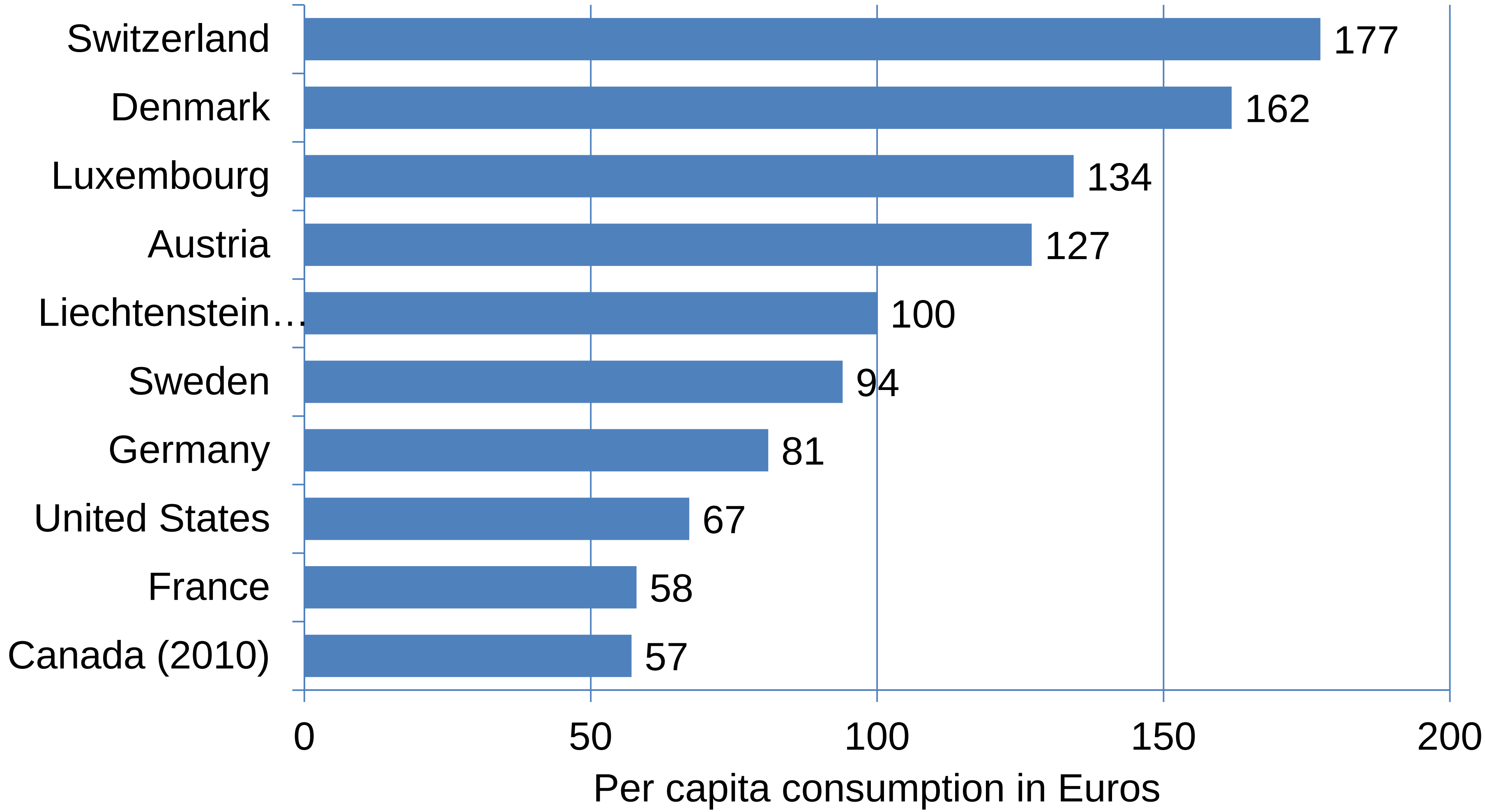
Source: FiBL-AMI-IFOAM Survey 2013, based on data from governments, the private sector and market research companies.

Global market: Distribution of retail sales value by single markets (total: 47.8 billion) Euros 2011

Source: FiBL-AMI-IFOAM Survey 2013



The ten countries with the highest per capita consumption 2011



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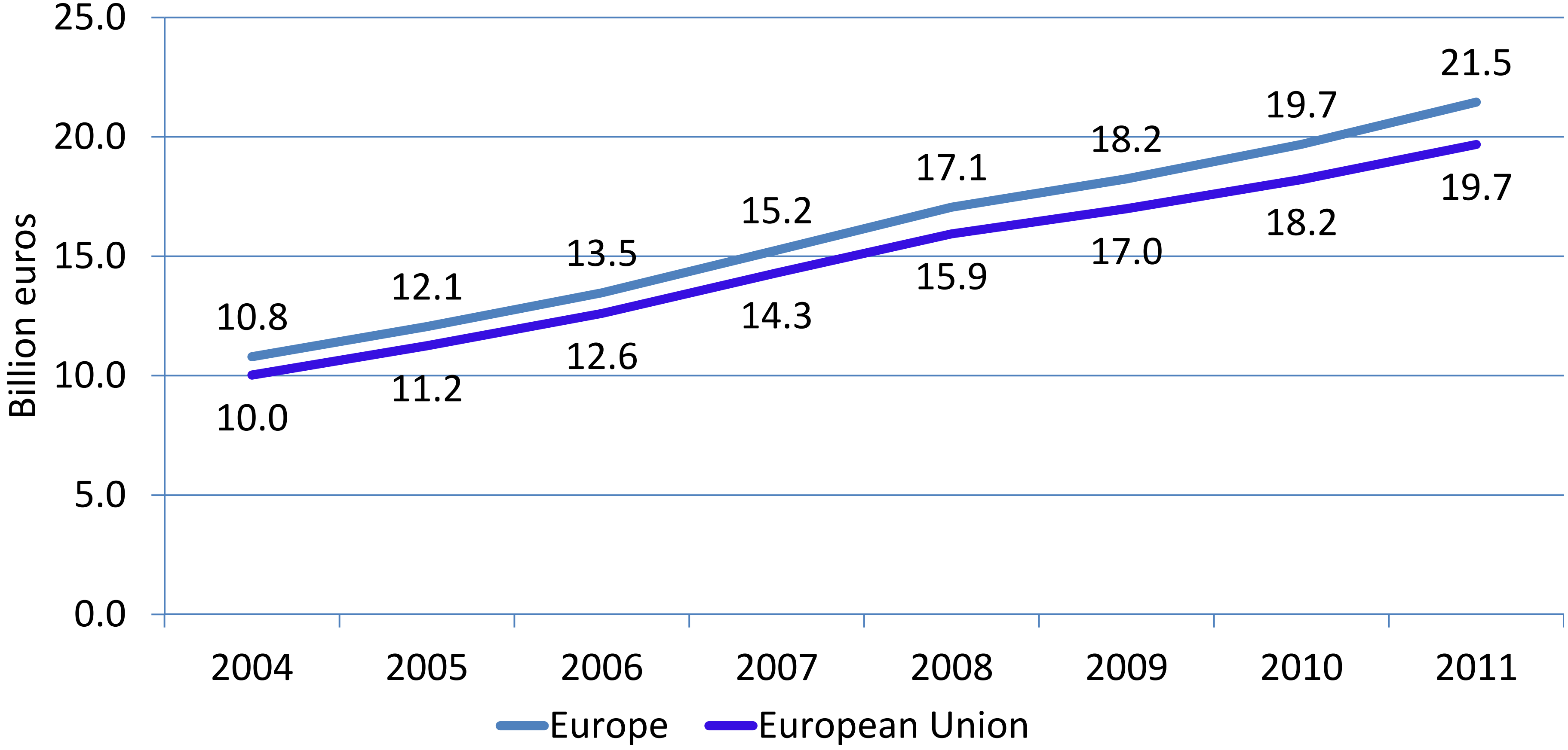
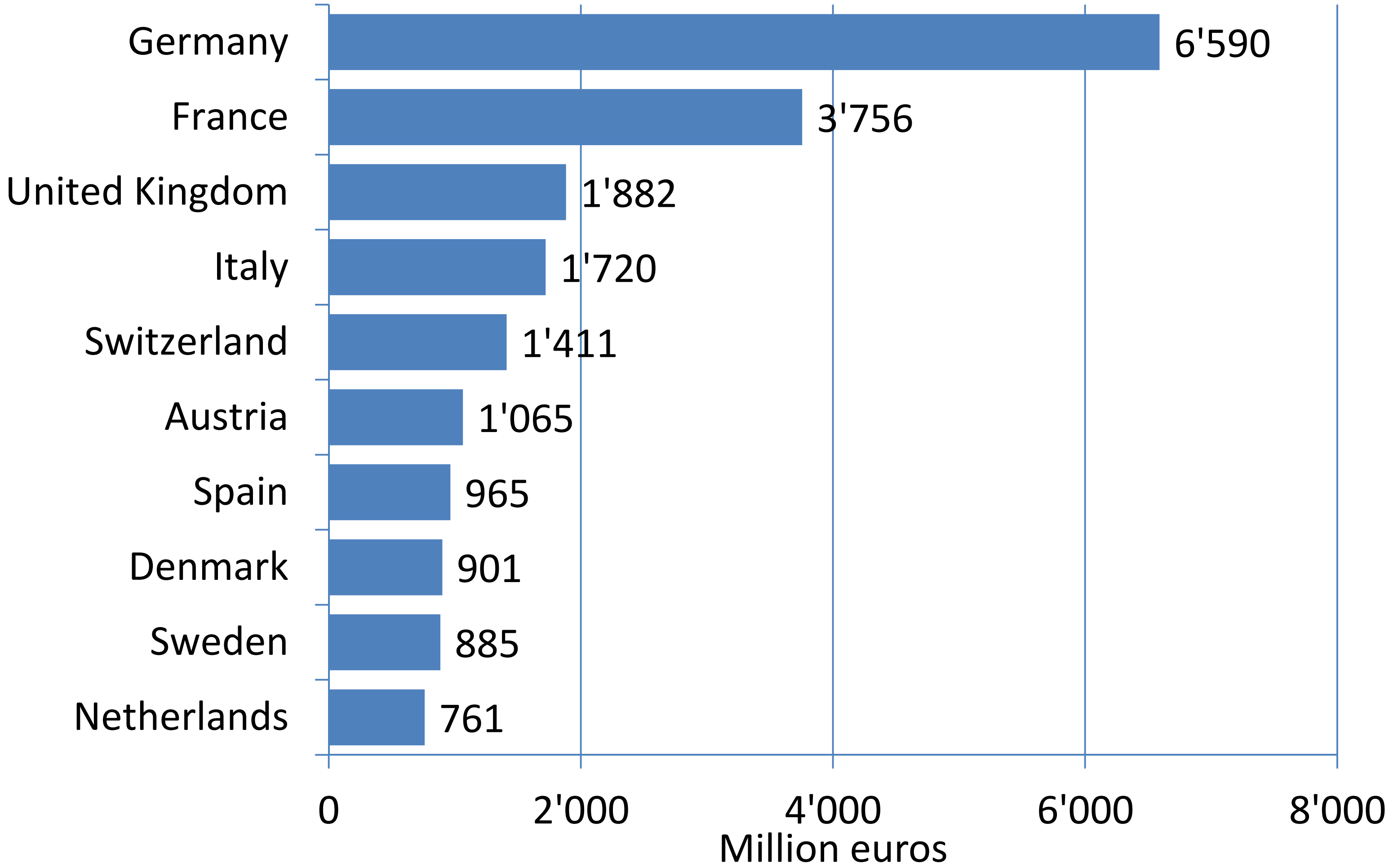
Source: FiBL-AMI-IFOAM Survey 2013, based on data from governments, the private sector and market research companies.

Europe: Growth of the Organic Market 2004-2011



Source: FiBL-AMI-IFOAM Survey 2013, based on data from governments, the private sector and market research companies.

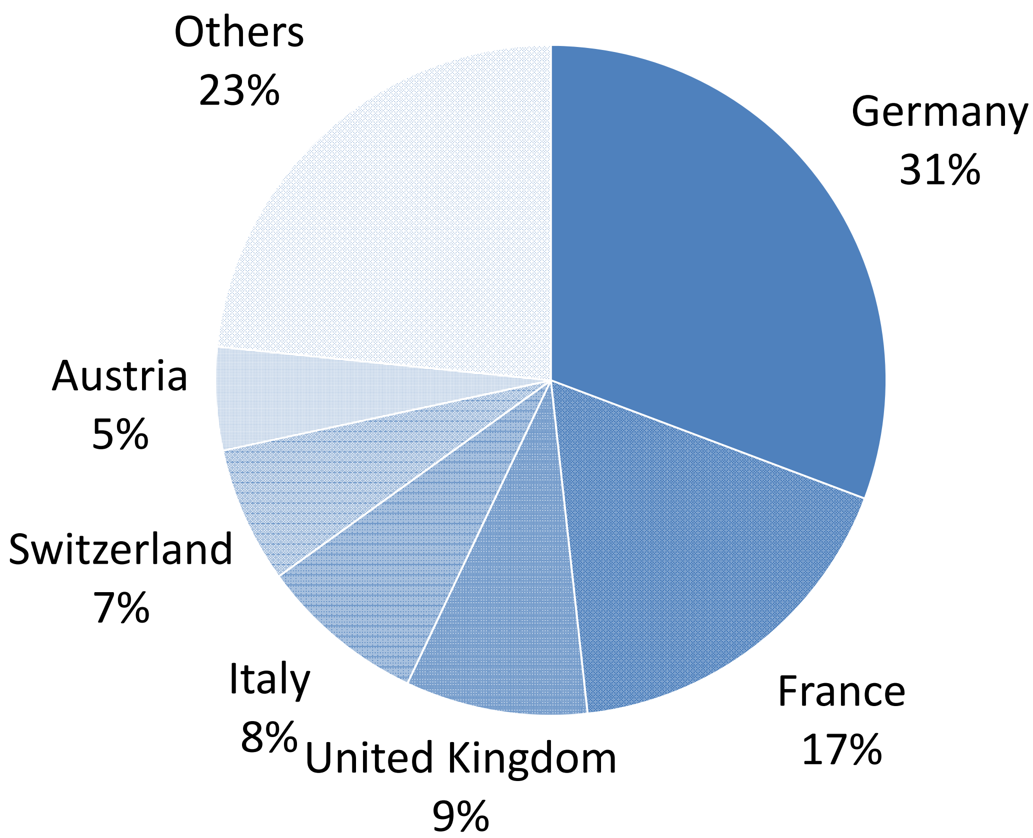
The European market for organic food and drink: The countries with the highest sales 2011



Source: FiBL-AMI-IFOAM Survey 2013, based on national sources, in the framework of the OrganicDataNetwork project

Europe: Distribution of sales of organic food and drink by country 2011 (total: 21.5 billion euros)

Last update: February 10, 2013



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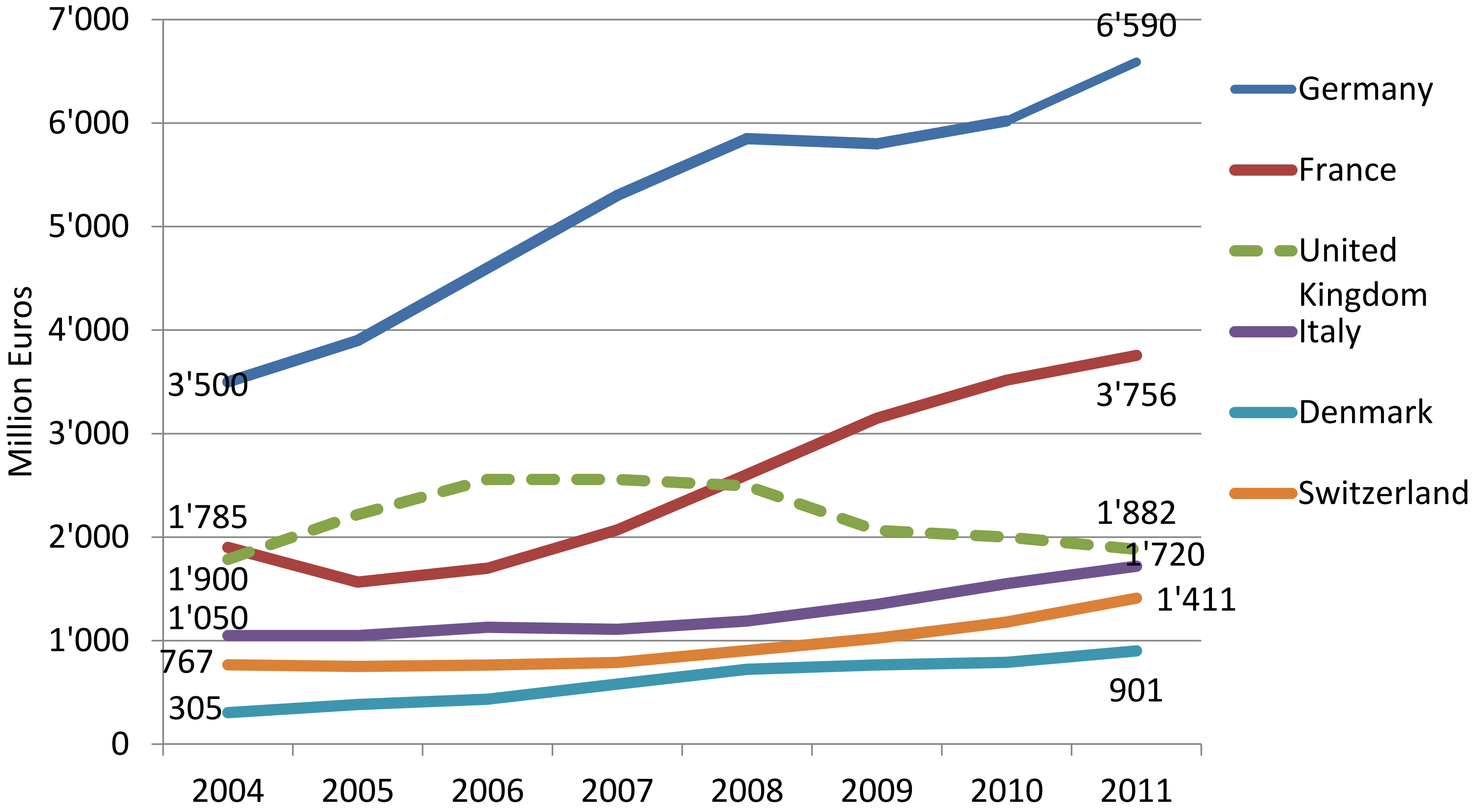
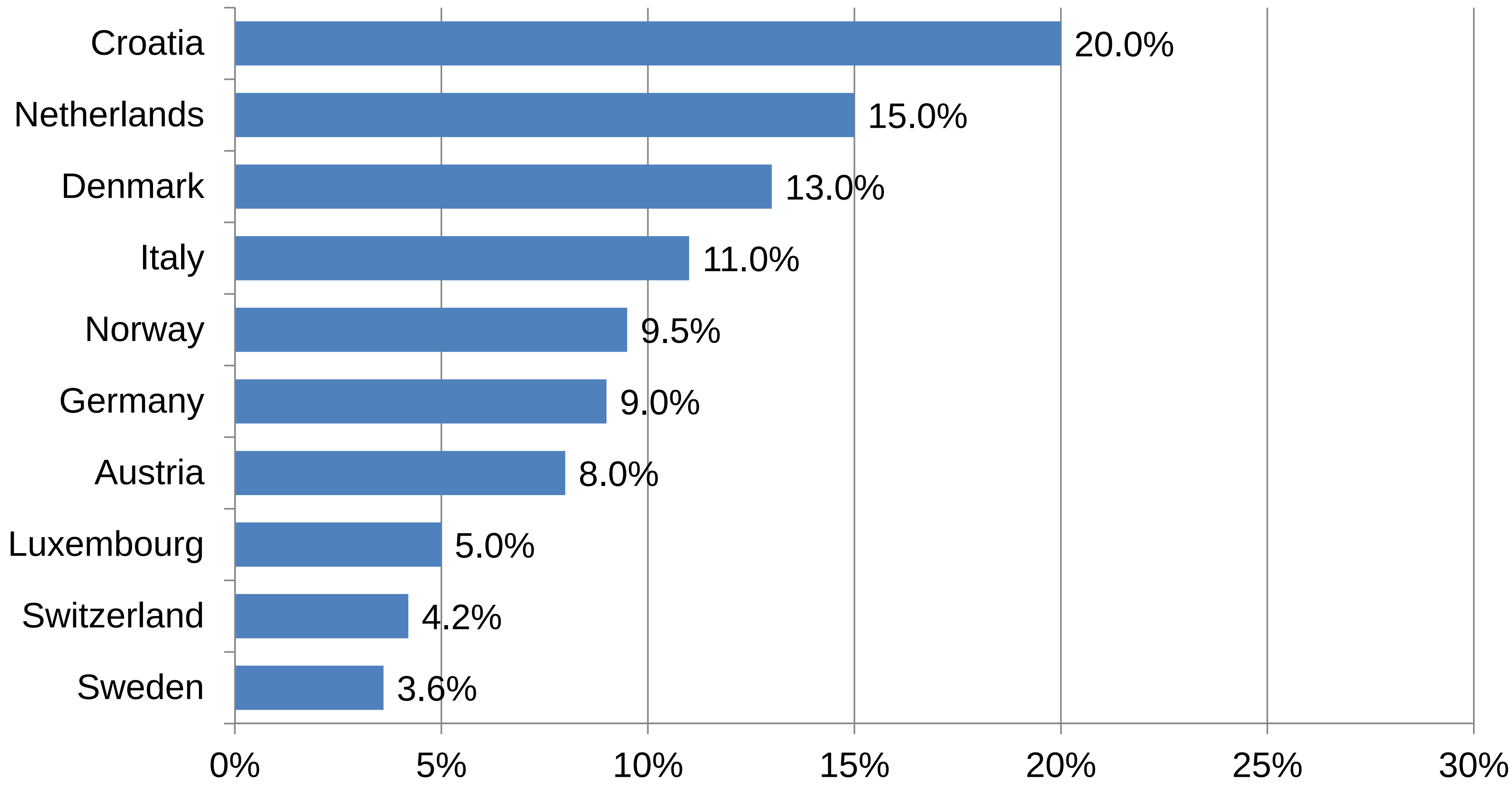
Source: FiBL-AMI-IFOAM Survey 2013, based on national sources, in the framework of the OrganicDataNetwork project

Development of the Organic Market in Selected European Countries 2004-2011



Europe: The ten countries with the highest market growth 2011



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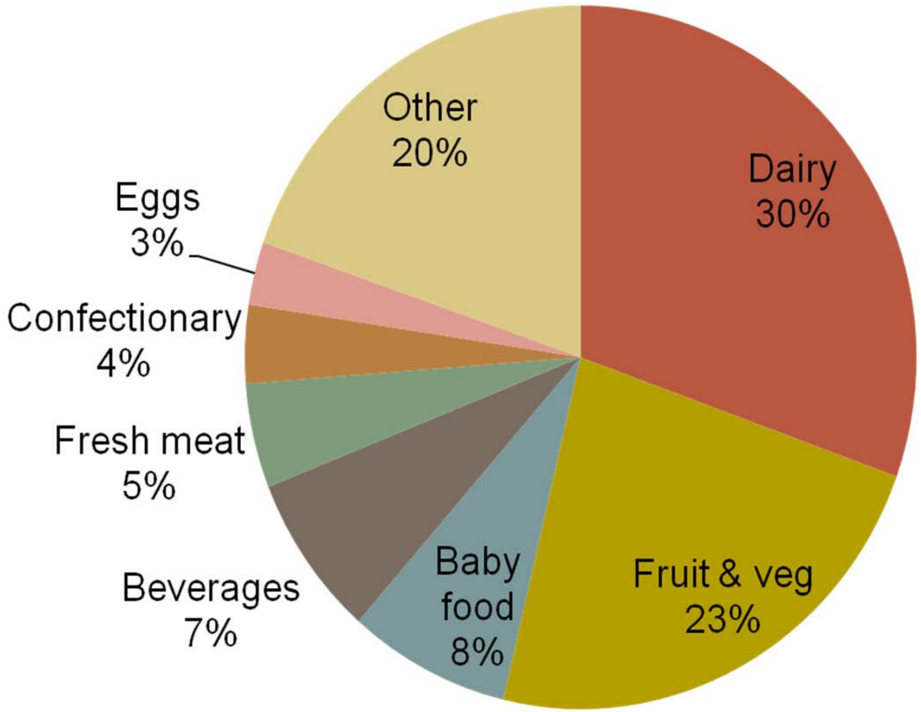
Source: FiBL Survey 2013, based on national sources

The most important sectors [% value] and change



Source: Soil Association 2011 Market Report

OrganicDataNetwork, FP 7, 2012-2014

- Funded under the 7th Framework Programme for Research and Technological Development
- Running 2012-2014
- Coordinator: Prof. Dr. Raffaele Zanoli, University of Ancona
- AIM: **The OrganicDataNetwork project aims to increase the transparency of the European market for organic food through better availability of market intelligence about the European organic sector in order to meet the needs of policy makers and market actors.**

- The OrganicDataNetwork project will:
- provide an overview of all relevant public and private organic data collectors;
- collect currently available data on organic markets in Europe, and produce a European database after having checked their reliability and consistency;
- develop a set of practical recommendations on data collection and dissemination (Code of Practice and a manual);
- improve the availability and the quality of published market reports on the organic sector in a number of case study countries;
- lay the foundations for a long-term collaboration on organic market data collection.

The World of Organic Agriculture 2013

- 14th edition of The World of Organic Agriculture
- Is available at the FiBL and the IFOAM booths (Hall 1, Stands 150 and 240). There is a discount for IFOAM members
- After BioFach the book can be bought at the FiBL and (shop.fibl.org) IFOAM webshops www.ifoam.org.
- Presentations, key data and background is available at www.organic-world.net/yearbook-2013.html.

Conclusions

- As in the past years, the organic area has shown good growth.
- The market grew at a higher rate than the organic land, and at a higher rate than in 2010 and 2009.
- Many of the big markets are dependent on imports; e.g. France imports 30 % of its organic products – and it aims at reducing the import share.
- From the 2012 data that are already available it can be concluded that the market and the organic area continue to grow.
- In 2013 the first results of the OrganicDataNetwork project will be avilable: The results of the end user survey; the inventory of data collectors and the product related information from the market data survey.

Acknowledgements

- The Swiss State Secretariat for Economic Affairs SECO, Berne

Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Confederation

Federal Department of Economic Affairs FDEA
State Secretariat for Economic Affairs SECO

- Nürnberg Messe, the organizers of the BioFach Organic Trade Fair

BioFach

- This work would not be possible without the support of the 200 experts who contribute to the making of "The World of Organic Agriculture"

Indicator	World	Leading countries
Countries with data on certified organic agriculture	2010: 160 countries	
Organic agricultural land	2010: 37 million hectares (2009: 37.1 million hectares; 1999: 11 million hectares)	Australia (12 mio. hectares, 2009) Argentina (4.2 mio. hectares) US (1.9 mio. hectares, 2008)
Share of total agricultural land	2010: 0.9 %	Falkland Islands (Malvinas) (35.9 %) Liechtenstein (27.3 %) Austria (19.7 %)
Growth of organic agricultural land	2010: -50’000 hectares = -0.1% (2009: +1.9 mio. hectares = +5%; 2008: +2.9 mio. hectares = +9%)	France: +168’000 hectares (+24 %) Poland: +155’000 hectares (+42 %) Spain: +126’000 hectares (+9%)
Further, non-agricultural organic areas (mainly wild collection)	2010: 43 million hectares (2009: 41 million hectares; 2008: 31.9 million hectares)	Finland (7.8 million hectares) Brazil (6.2 million hectares; 2007) Cameroon (6 million hectares)
Producers	1.6 million producers (2009: 1.8 million producers; 2008: 1.4 million producers)	India (400’551), Uganda (188’625), Mexico (128’826)
Organic market size	44.5 billion euros or 59.1 billion US dollars (2009: 54.9 billion US dollars 1999: 15.2 billion US dollars) Source: Organic Monitor	US (20.2 billion euros or 26.7 billion USD, Germany (6 billion euros or 8.4 billion US dollars) France (3.4 billion euros or 4.7 billion US dollars)
Per capita consumption	2o10: 6.5 euros or 8.6 US dollars	Switzerland (153 euros or 213 USD), Denmark (142 euros or 198 USD) Luxemburg (127 euros or 177 USD)
Number of countries with organic regulations 2010	84 countries (2009: 74 countries)	
Organic certifiers 2010	2011: 549 certifiers (2010: 532; 2009 489)	Japan, USA, South Korea
Number of IFOAM affiliates	1.1.2012: 870 affiliates from 120 countries (2011: 757 from 115 countries;	Germany: 105 affiliates; India: 50 affiliates; China: 41 affiliates; South Korea: 39 affiliates; United States: 39