The European Market for Organic Food 2011

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BioFach Congress 2013, 14.2.2013
Europe: Organic agricultural land by country 2011

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
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

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

Source: Nic Lampkin, FiBL, 1985-2013, based on data from governments, Eurostat, 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

- Spain: 1'621'898 hectares
- Italy: 1'096'889 hectares
- Germany: 1'015'626 hectares
- France: 975'141 hectares
- United Kingdom: 638'528 hectares
- Poland: 609'412 hectares
- Austria: 542'553 hectares
- Sweden: 480'185 hectares
- Czech Republic: 460'498 hectares
- Turkey: 442'582 hectares

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)

- Spain: 1,621,898 hectares (15%)
- Italy: 1,096,889 hectares (10%)
- Germany: 1,015,626 hectares (10%)
- France: 9,751,411 hectares (56%)
- Rest: 9,275,573 hectares (9%)

FiBL-IFOAM survey 2013
Europe: The ten countries with the highest shares of organic agricultural land 2011

- Liechtenstein: 29.3%
- Austria: 19.7%
- Sweden: 15.4%
- Estonia: 14.8%
- Switzerland: 11.7%
- Czech Republic: 10.8%
- Latvia: 10.4%
- Slovakia: 8.6%
- Italy: 8.6%
- Faroe Islands: 8.4%

Source: FiBL Survey 2013, based on national sources
Development of organic land use types in Europe 2004-2011

- Arable crops
- Permanent crops
- Permanent grassland/ grazing

Million hectares

2004 2005 2006 2007 2008 2009 2010 2011
Development of selected crops/crop groups in Europe

Source: FiBL-IFOAM Survey 2013

- **Cereals**: +5%
- **Olives**: +15%
- **Protein crops**: +2%
- **Grapes**: +20.2%
- **Oilseeds**: -1.5%
- **Fruit**: +18.2%
- **Vegetables**: +3.5%
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

- United States of America: 44%
- Germany: 20%
- France: 14%
- Canada: 8%
- United Kingdom: 4%
- Italy: 4%
- Switzerland: 3%
- Others: 3%

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Per capita consumption in Euros</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switzerland</td>
<td>177</td>
</tr>
<tr>
<td>Denmark</td>
<td>162</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>134</td>
</tr>
<tr>
<td>Austria</td>
<td>127</td>
</tr>
<tr>
<td>Liechtenstein</td>
<td>100</td>
</tr>
<tr>
<td>Sweden</td>
<td>94</td>
</tr>
<tr>
<td>Germany</td>
<td>81</td>
</tr>
<tr>
<td>United States</td>
<td>67</td>
</tr>
<tr>
<td>France</td>
<td>58</td>
</tr>
<tr>
<td>Canada (2010)</td>
<td>57</td>
</tr>
</tbody>
</table>

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

- Germany: 31%
- France: 17%
- United Kingdom: 9%
- Italy: 8%
- Switzerland: 7%
- Austria: 5%
- Others: 23%

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

Million Euros

- Germany
- France
- United Kingdom
- Italy
- Denmark
- Switzerland

2004 2005 2006 2007 2008 2009 2010 2011
Europe: The ten countries with the highest market growth 2011

- Croatia: 20.0%
- Netherlands: 15.0%
- Denmark: 13.0%
- Italy: 11.0%
- Norway: 9.5%
- Germany: 9.0%
- Austria: 8.0%
- Luxembourg: 5.0%
- Switzerland: 4.2%
- Sweden: 3.6%

Source: FiBL Survey 2013, based on national sources
The most important sectors [% value] and change

- Dairy: 30%
- Fruit & veg: 23%
- Baby food: 8%
- Beverages: 7%
- Fresh meat: 5%
- Confectionary: 4%
- Eggs: 3%
- Other: 20%

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 available: 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

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

› This work would not be possible without the support of the 200 experts who contribute to the making of "The World of Organic Agriculture"
<table>
<thead>
<tr>
<th>Indicator</th>
<th>World</th>
<th>Leading countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Countries with data on certified organic agriculture</td>
<td>2010: 160 countries</td>
<td></td>
</tr>
<tr>
<td>Organic agricultural land</td>
<td>2010: 37 million hectares</td>
<td>Australia (12 mio. hectares, 2009)</td>
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<tr>
<td></td>
<td>(2009: 37.1 million hectares;</td>
<td>Argentina (4.2 mio. hectares)</td>
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<tr>
<td></td>
<td>1999: 11 million hectares)</td>
<td>US (1.9 mio. hectares, 2008)</td>
</tr>
<tr>
<td>Share of total agricultural land</td>
<td>2010: 0.9 %</td>
<td>Falkland Islands (Malvinas) (35.9 %)</td>
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<td></td>
<td></td>
<td>Liechtenstein (27.3 %)</td>
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<td></td>
<td></td>
<td>Austria (19.7 %)</td>
</tr>
<tr>
<td>Growth of organic agricultural land</td>
<td>2010: -50’000 hectares = -0.1%</td>
<td>France: +168’000 hectares (+24 %)</td>
</tr>
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<td></td>
<td>(2009: +1.9 mio. hectares = +5%;</td>
<td>Poland: +155’000 hectares (+42 %)</td>
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<tr>
<td></td>
<td>2008: +2.9 mio. hectares = +9%)</td>
<td>Spain: +126’000 hectares (+9%)</td>
</tr>
<tr>
<td>Further, non-agricultural organic areas (mainly wild collection)</td>
<td>2010: 43 million hectares</td>
<td>Finland (7.8 million hectares)</td>
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<td></td>
<td>(2009: 41 million hectares;</td>
<td>Brazil (6.2 million hectares; 2007)</td>
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<tr>
<td></td>
<td>2008: 31.9 million hectares)</td>
<td>Cameroon (6 million hectares)</td>
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<tr>
<td>Producers</td>
<td>1.6 million producers</td>
<td>India (400'551), Uganda (188'625), Mexico (128'826)</td>
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<td></td>
<td>(2009: 1.8 million producers;</td>
<td></td>
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<td></td>
<td>2008: 1.4 million producers)</td>
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<tr>
<td>Organic market size</td>
<td>44.5 billion euros or 59.1 billion US dollars</td>
<td>US (20.2 billion euros or 26.7 billion USD,</td>
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<td></td>
<td>(2009: 54.9 billion US dollars</td>
<td>Germany (6 billion euros or 8.4 billion US dollars)</td>
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<tr>
<td></td>
<td>1999: 15.2 billion US dollars)</td>
<td>France (3.4 billion euros or 4.7 billion US dollars)</td>
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<td></td>
<td>Source: Organic Monitor</td>
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<tr>
<td>Per capita consumption</td>
<td>2010: 6.5 euros or 8.6 US dollars</td>
<td>Switzerland (153 euros or 213 USD),</td>
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<td></td>
<td>Denmark (142 euros or 198 USD)</td>
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<td></td>
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<td>Luxemburg (127 euros or 177 USD)</td>
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<tr>
<td>Number of countries with organic regulations 2010</td>
<td>84 countries</td>
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<td></td>
<td>(2009: 74 countries)</td>
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<tr>
<td>Organic certifiers 2010</td>
<td>2011: 549 certifiers</td>
<td>Japan, USA, South Korea</td>
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<td>(2010: 532; 2009 489)</td>
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<tr>
<td>Number of IFOAM affiliates</td>
<td>1.1.2012: 870 affiliates from 120 countries</td>
<td>Germany: 105 affiliates; India: 50 affiliates; China: 41 affiliates; South Korea: 39 affiliates; United States: 39</td>
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</tbody>
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