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Institut de recherche de l'agriculture biologique  
Research Institute of Organic Agriculture

EXCELLENCE FOR SUSTAINABILITY



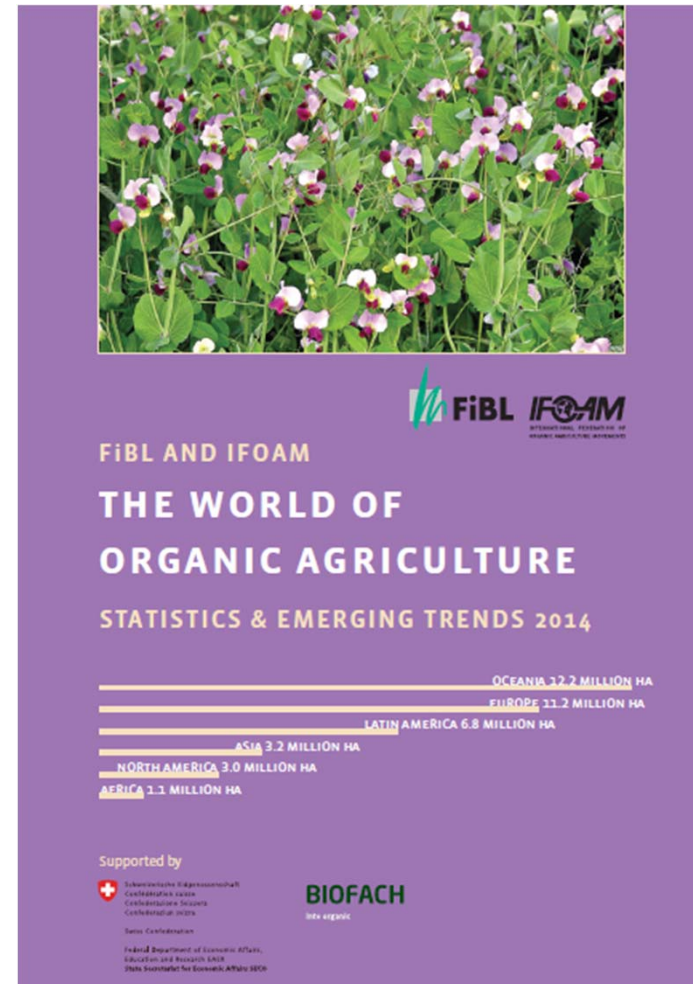
# The European Market for Organic Food

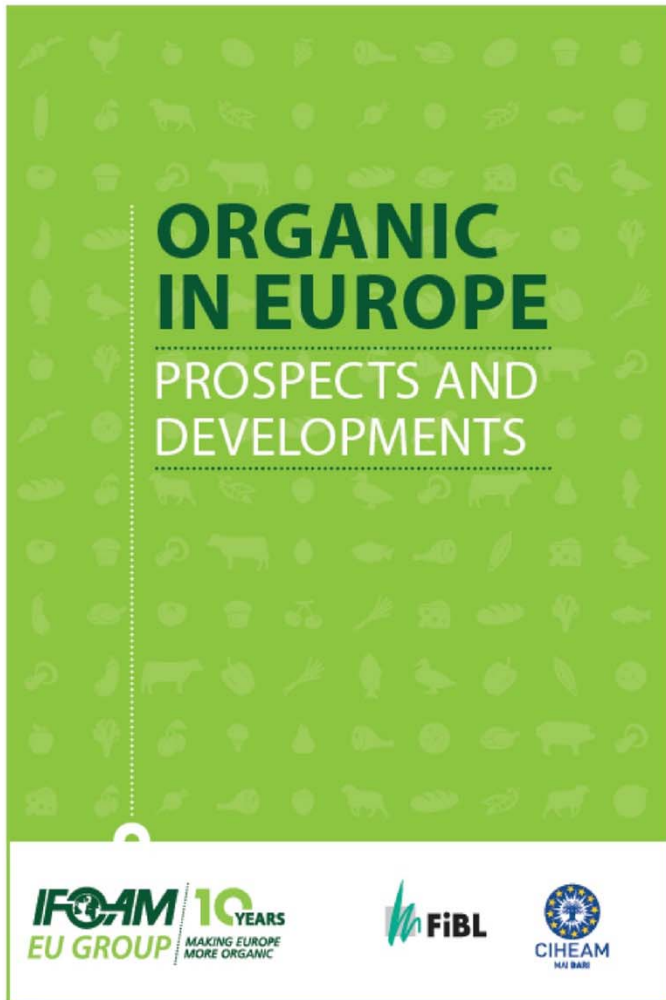
**Helga Willer and Julia Lernoud, Forschungsinstitut für biologischen Landbau (FiBL), Frick**  
**Diana Schaack, Agrarmarkt Informationsgesellschaft (AMI), Bonn, Germany**

**BIOFACH 2014, 13.2.2014**

# The World of Organic Agriculture 2014

- › The 15th edition of 'The World of Organic Agriculture', was published by FiBL and IFOAM in February 2014.\*
- › Contents:
  - › Results of the survey on organic agriculture worldwide;
  - › Organic agriculture in the regions and country reports;
  - › Australia, Canada, Croatia, the Pacific Islands, United Arab Emirates, and The United States of America.
  - › Chapters on the global market, standards & legislations, voluntary standards, PGS, European market and tea production in China
  - › Numerous tables and graphs.
  - › The book can be ordered via IFOAM.org and shop.FiBL.org.
  - › \*Willer, H, Lernoud, J, (2014) The World of Organic Agriculture. Statistics and Emerging Trends 2014. FiBL, Frick, and, IFOAM, Bonn





New publication from IFOAM EU,  
FiBL and CIHEAM-IAMB



- **Latest growth trends**
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- **Farming and food policy overview**
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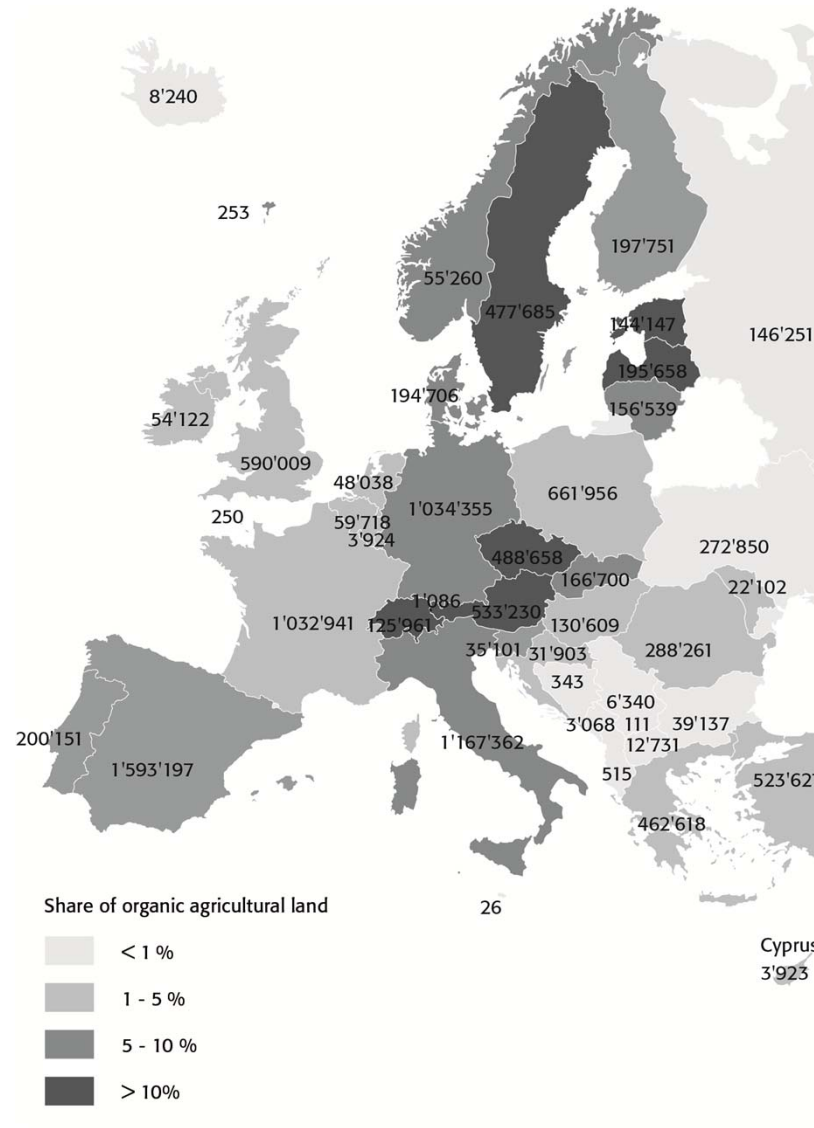


# Recent developments

- › IFOAM EU Group celebrates 10th anniversary in 2013
- › TP Organics was granted official status as a “technology platform” in 2013
- › Review of the EU’s political and legal framework
  - › Revision of organic regulation
  - › New action plan in 2014
- › New legislation on the European Union’s agri-environmental programs.



# Europe: Organic agricultural land by country 2012

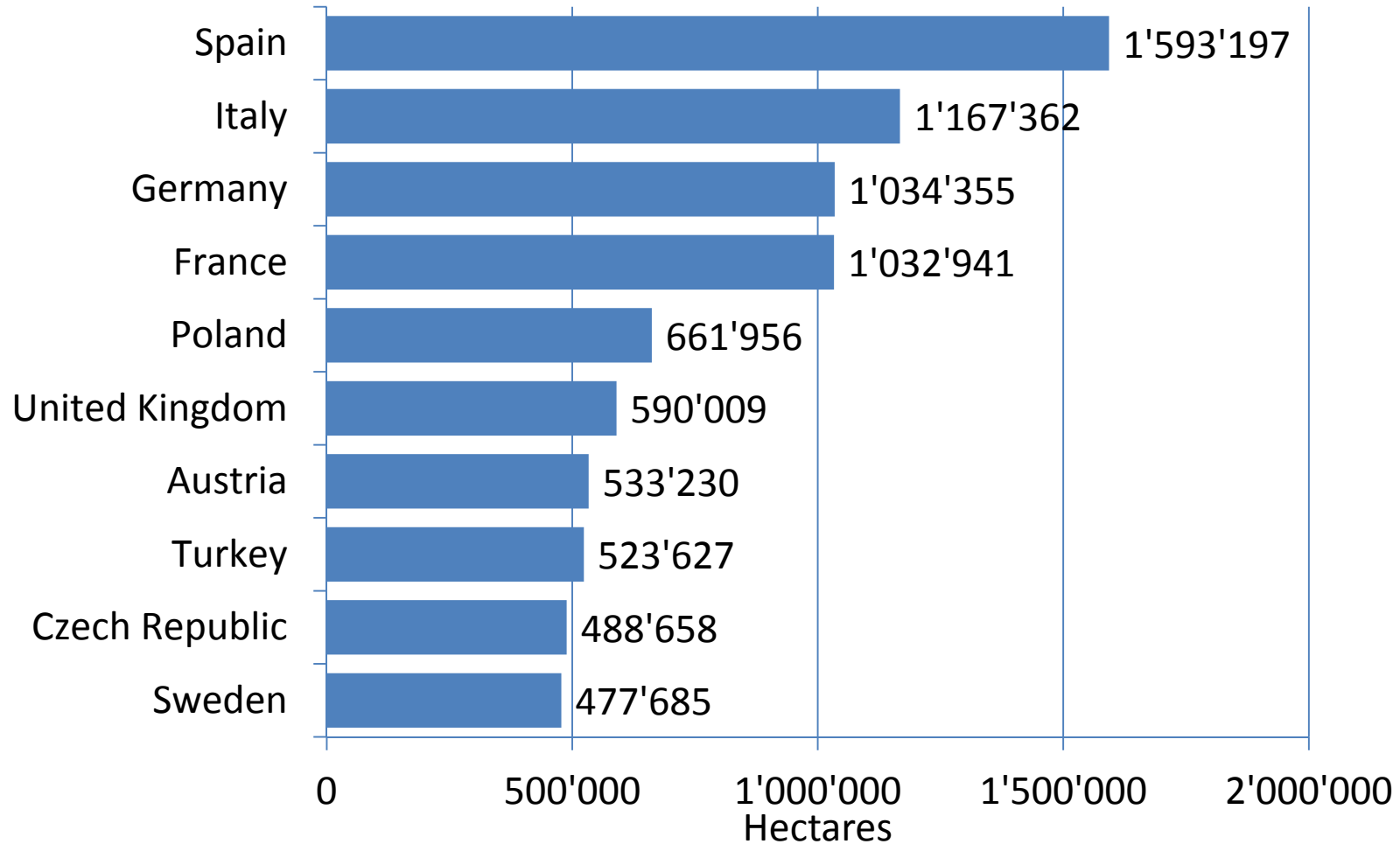


# Organic agriculture in Europe: Key data/indicators 2012

- › **11.2 million hectares** of agricultural land are organic (EU 10 million hectares).
- › This constitutes **2.3 percent of the agricultural land** in Europe (**EU 5.6 percent**).
- › The organic agricultural land increased by 0.63 million hectares (EU 0.54 million hectares) or **six percent in 2012**
- › Amost **320'000 producers** were reported (EU 250'000) .
- › The market was **22.8 billion euros** (EU 20.9); six percent more than in 2011.

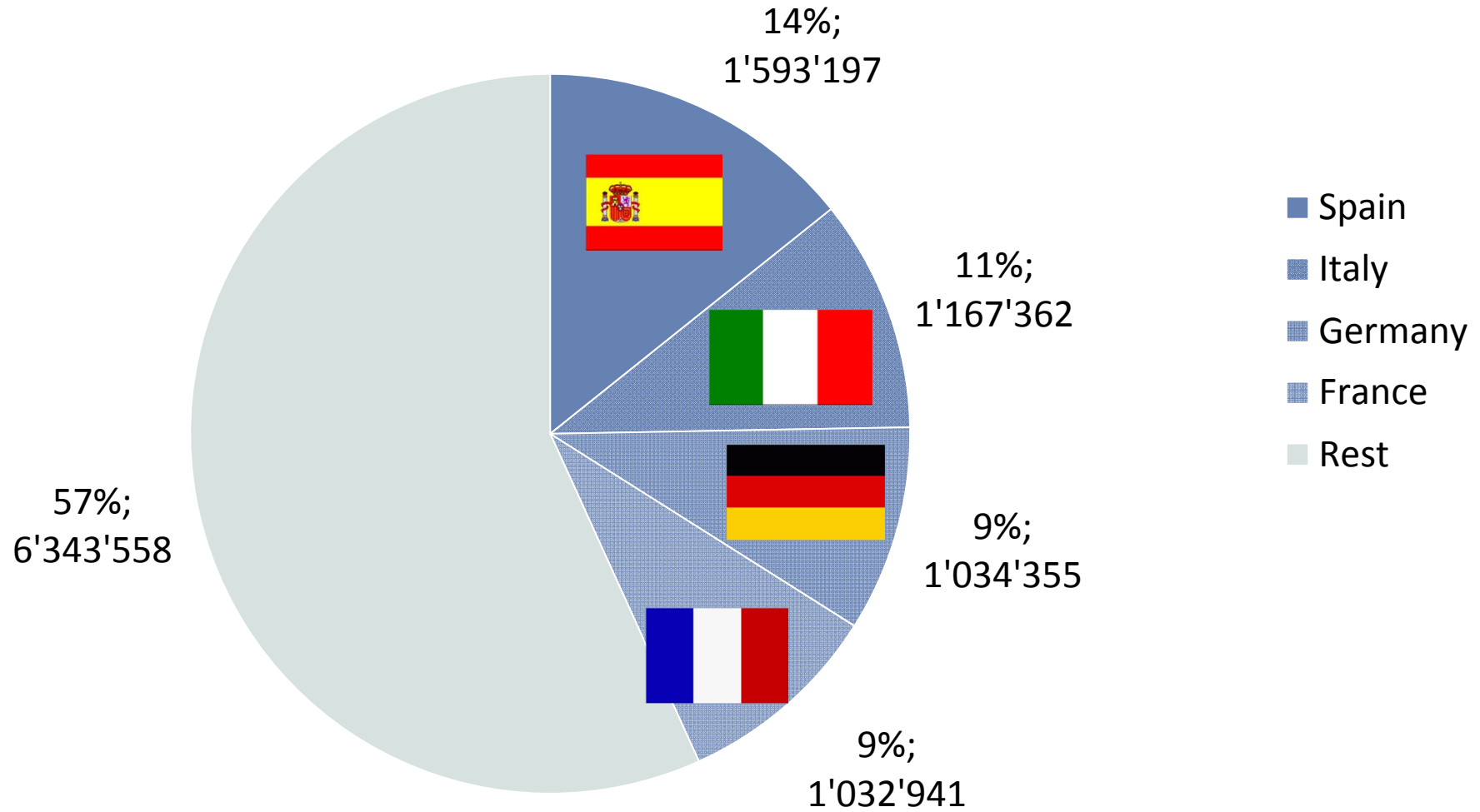
## Europe: The ten countries with the largest organic area 2012

Source: OrganicDataNetwork Survey 2013 based on national data sources and FiBL-AMI survey 2014



# Europe: Distribution of organically managed agricultural land by country 2012 (Total: 11.2 million hectares)

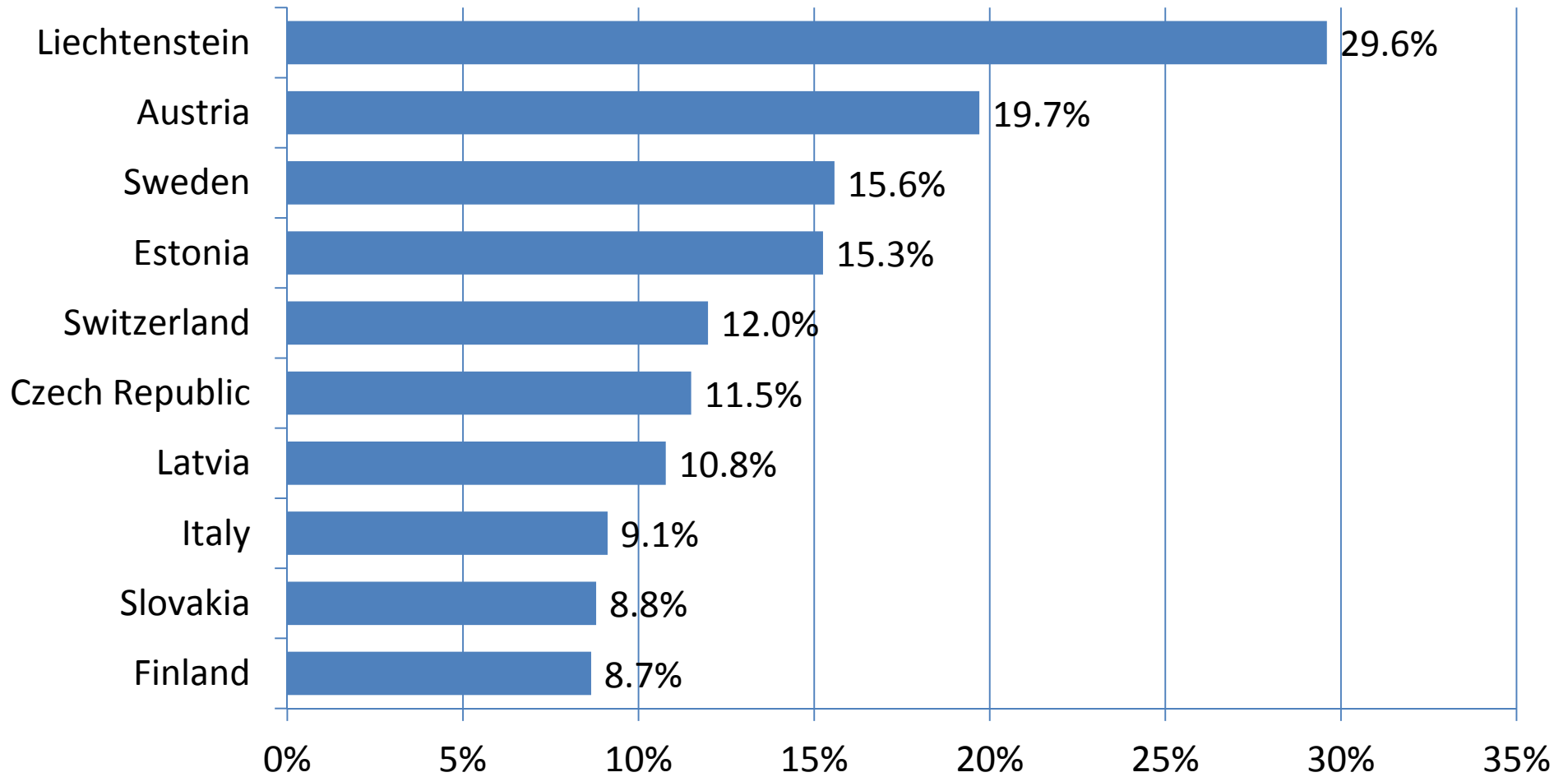
Source: OrganicDataNetwork Survey 2013 based on national data sources and FiBL-AMI survey 2014





## Europe: The countries with the highest share of organic agricultural land 2012

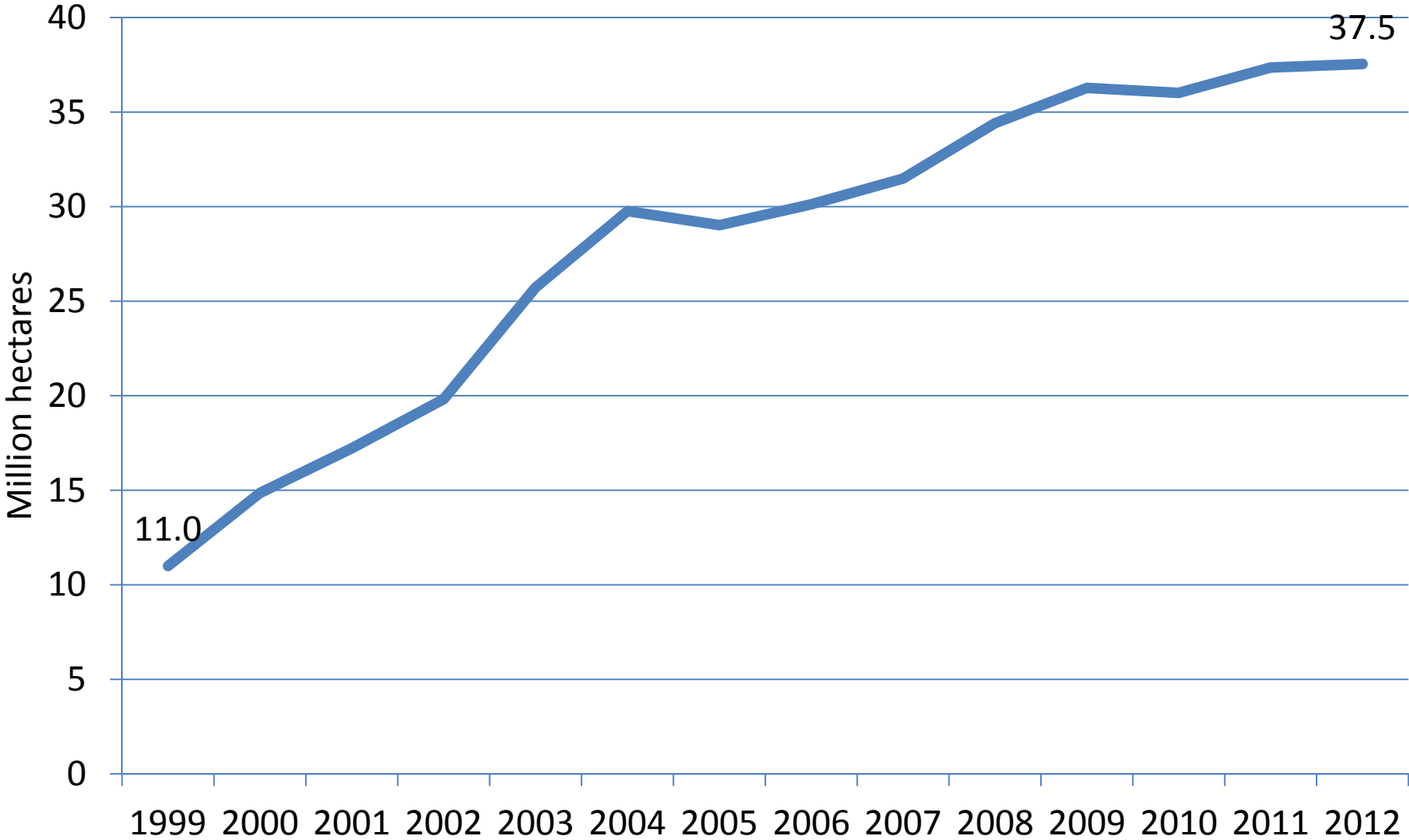
Source: OrganicDataNetwork Survey 2013 based on national data sources and FiBL-AMI survey 2014



Country / Region		Running period	Number of previous actions plans	Year of implementation of the first action plan	Quantitative targets		Target year
					Share of organic for total agricultural area	Share of organic food in the total food market <sup>a</sup>	
AL	Albania	2006 - 2013	0	2007	2 % <sup>o</sup>	-	-
AT	Austria	2011 - 2013	4	2001	20 %	-	2013
BE	Flanders	2013 - 2017	3	2000	-	-	-
	Wallonia	2013 - 2020	0	2013	14 %	-	2020
BG	Bulgaria	2007 - 2013	0	2007	8 %	-	2013
HR	Croatia	2011 - 2016	0	2011	8 %	-	2016
CZ	Czech Republic	2011 - 2015	1	2004	15 %	3 % <sup>b</sup>	-
DK	Denmark	2012 - 2020	2	1995	ca. 15 % <sup>c</sup>	-	2020
EE	Estonia	2007 - 2013	0	2007	ca. 3 % <sup>d</sup>	3 % <sup>o</sup>	2013
FI	Finland	2013 - 2020	1	2013	20 %	-	2020
MK	FYROM	2013 - 2020	1	2013	4 %	-	-
FR	France	2013 - 2017	2	2008	ca. 8 %	-	2012
DE	Germany	since 2002	0	2002	- <sup>g</sup>	-	- <sup>g</sup>
IE	Ireland	2013 - 2015	1	2008	5 %	-	2020
IT	Italy	-	1	2005	-	-	-
LV	Latvia	2007 - 2013	1	2007	10 %	-	2013
LU	Luxembourg	2009 - 2013	0	2009	ca. 5 % <sup>h</sup>	-	-
ME	Montenegro	2012 - 2017	0	2012	-	-	2017
NL	Netherlands	-	2	2001	-	-	-
NO	Norway	2009 - 2020	0	2009	15 %	15 %	2020
PL	Poland	2011 - 2014	1	2007	ca. 4 % <sup>i</sup>	-	2013 <sup>j</sup>
RO	Romania	-	1	2004	-	-	-
SK	Slovakia	2011 - 2013	1	2006	5 %	-	-
SI	Slovenia	2005 - 2015	1	2007	20 %	10 % <sup>k</sup>	2015
ES <sup>l</sup>	Spain	-	1	2007	-	-	-
SE	Sweden	-	1	1996	20 % <sup>m</sup>	-	2014
TR	Turkey	2013 - 2016	0	2013	-	-	-
UK <sup>n</sup>	Scotland	since 2011	0	2007	-	-	-

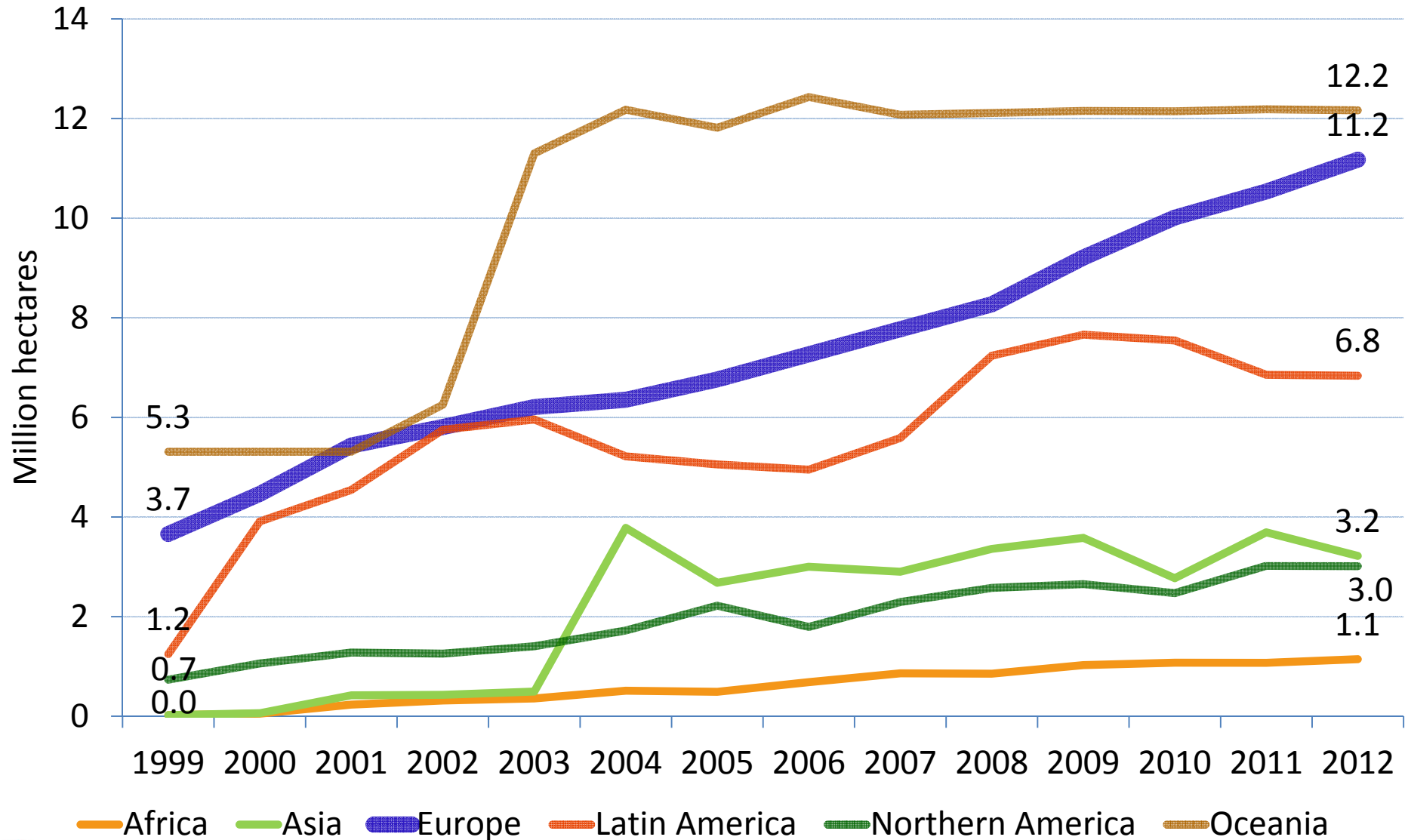
# Growth of the organic agricultural land worldwide 1999-2012

Source: FiBL-IFOAM-SOEL-Surveys 1999-2014



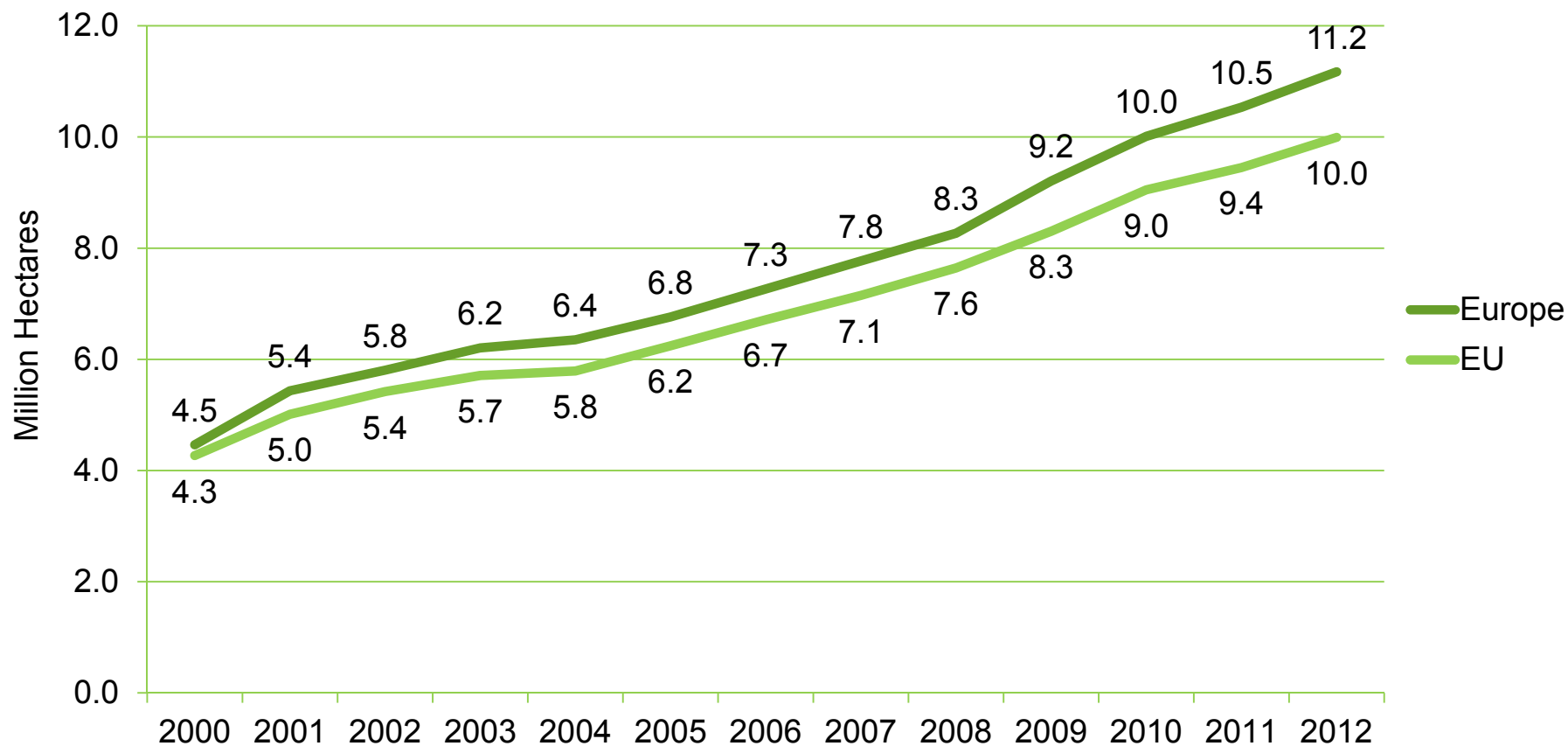
# Growth of the organic agricultural land by continent 1999-2012

Source: FiBL-IFOAM-SOEL-Surveys 1999-2014



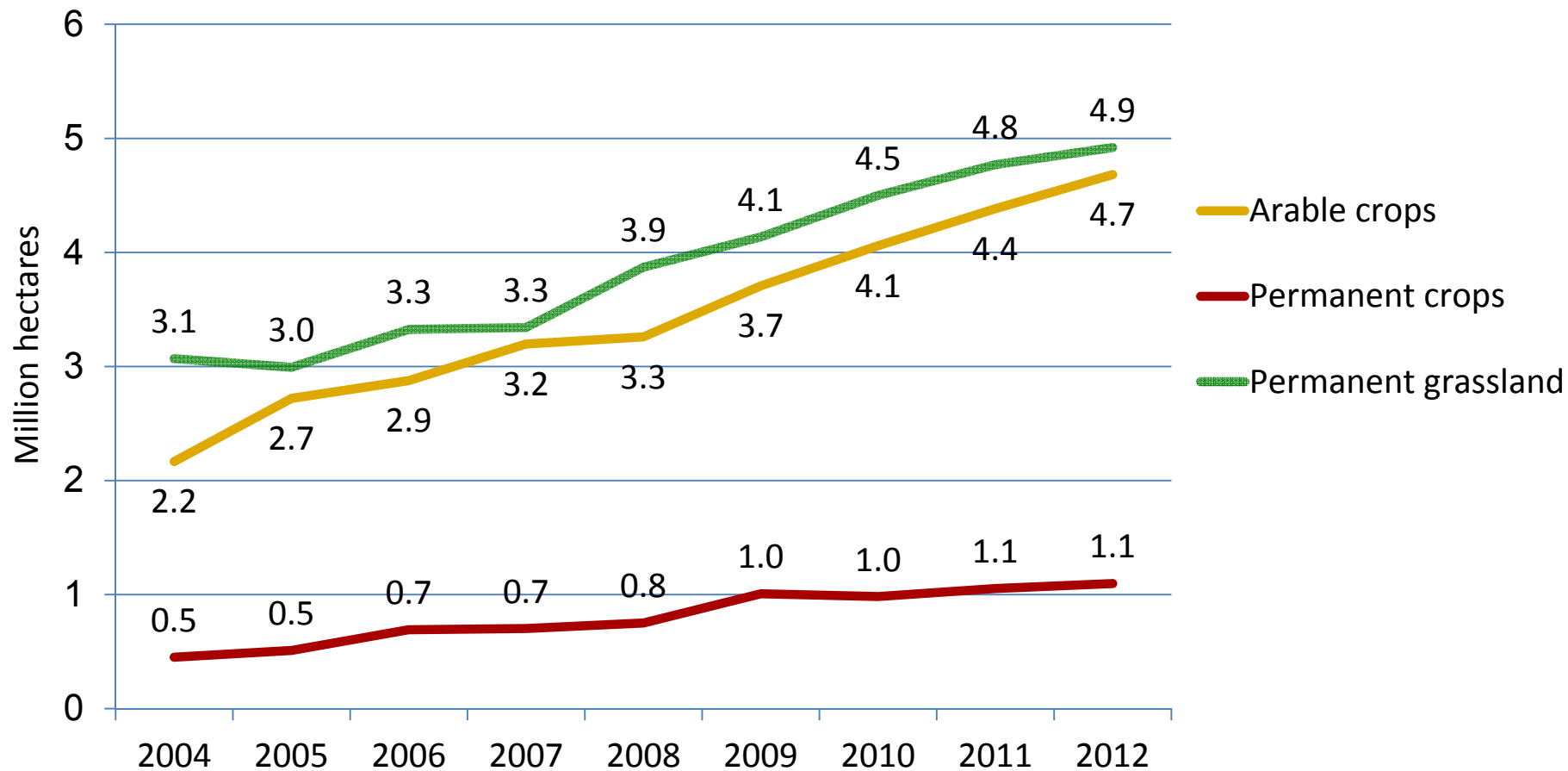
# Europe: Development of organic agricultural land 1985-2012

Source: FiBL-AMI-SOEL survey 2000-2012 - OrganicDataNetwork



# Development of the organic land by land use type 2004-2012

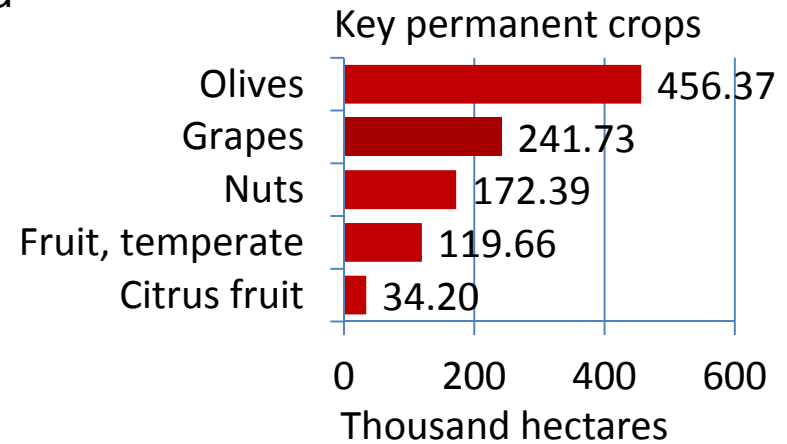
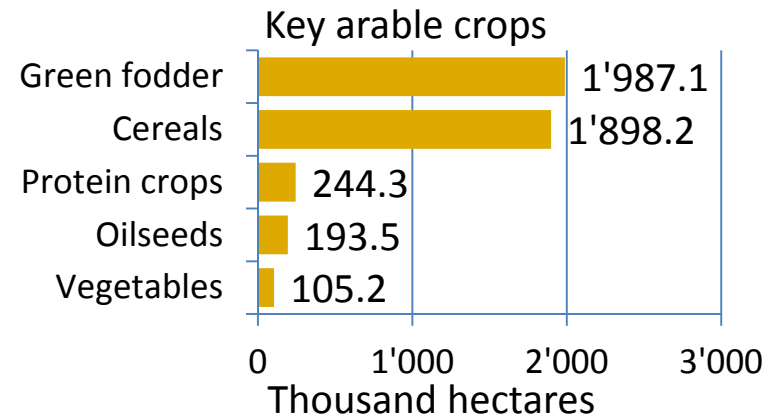
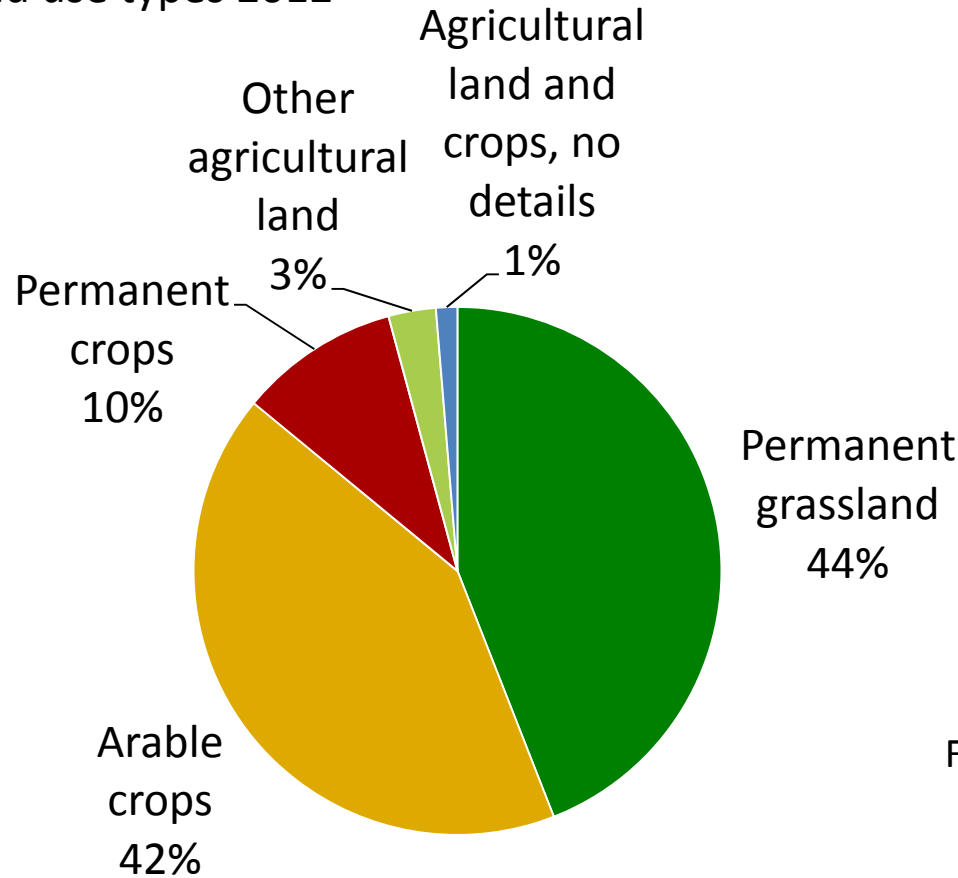
Source: FiBL-IFOAM-SOEL-Surveys 1999-2014



# Europe: Use of agricultural organic land 2012

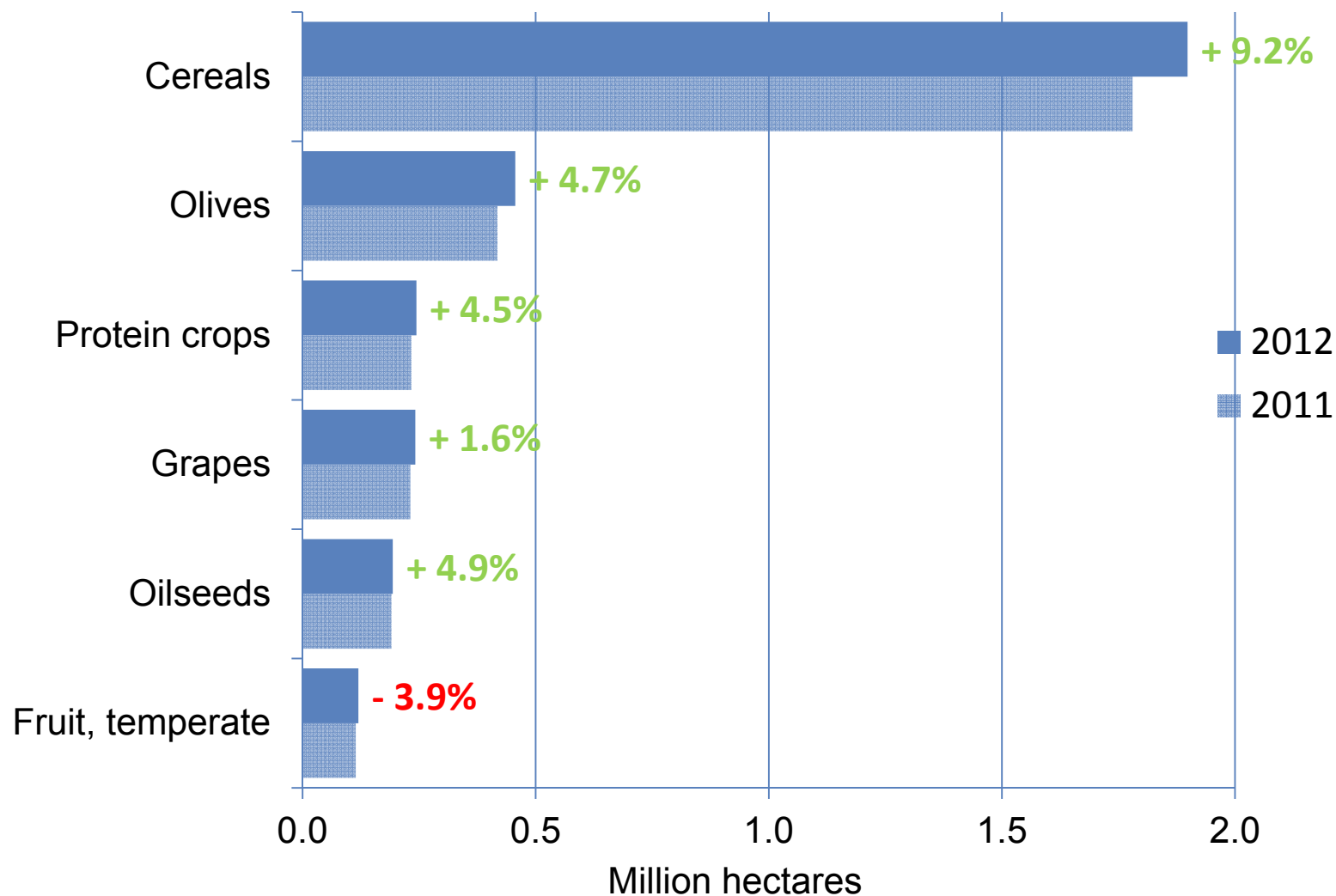
Source: Source: OrganicDataNetwork Survey 2013 based on national data sources and FiBL-AMI survey 2014

## Land use types 2012



# Development of organic crops/crop groups in Europe 2004-2012

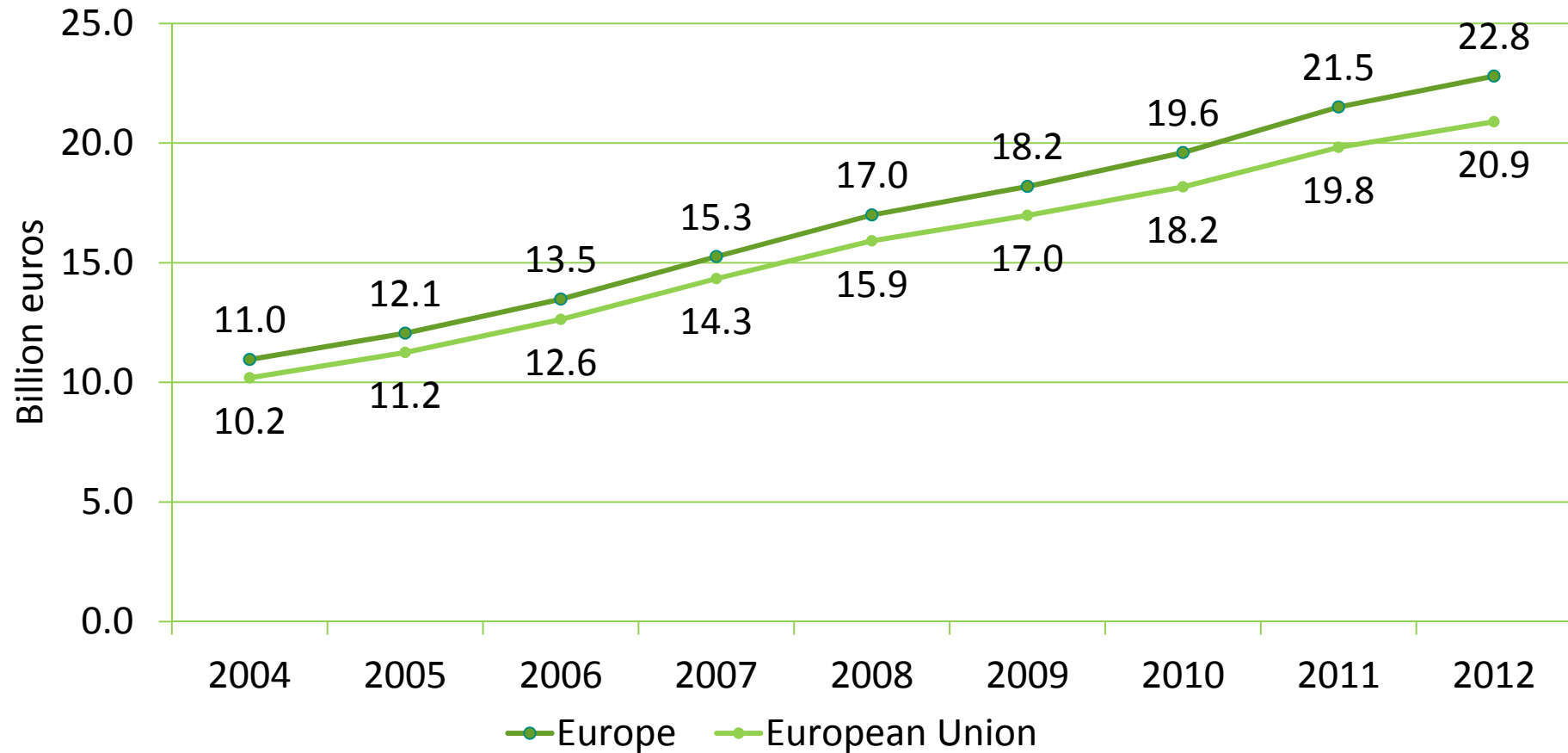
Source: FiBL-IFOAM survey 2014





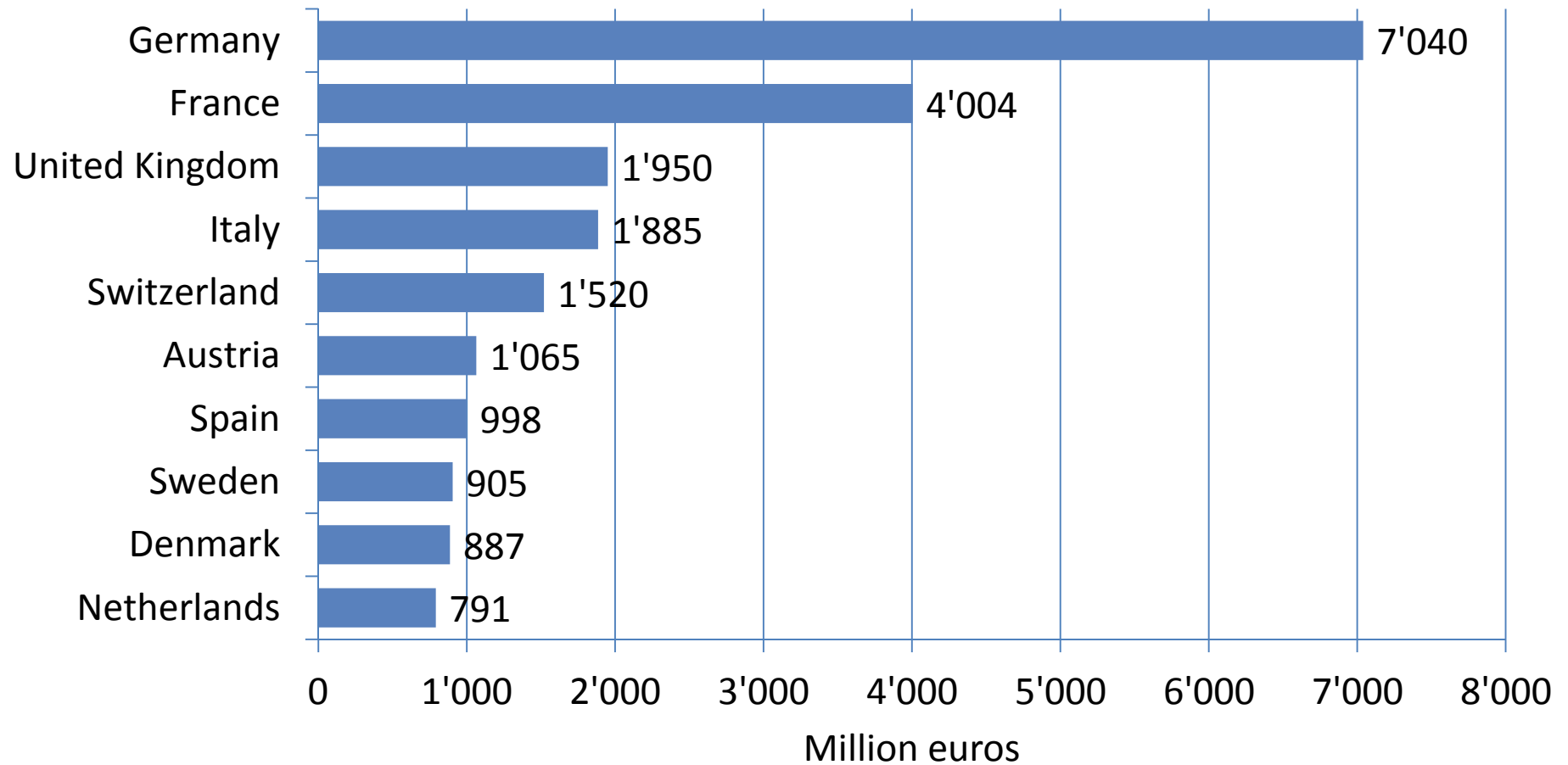
## Europe and European Union: Market development 2004-2012

Source: FiBL-AMI Surveys 2006-2014, OrganicDataNetwork Survey 2013



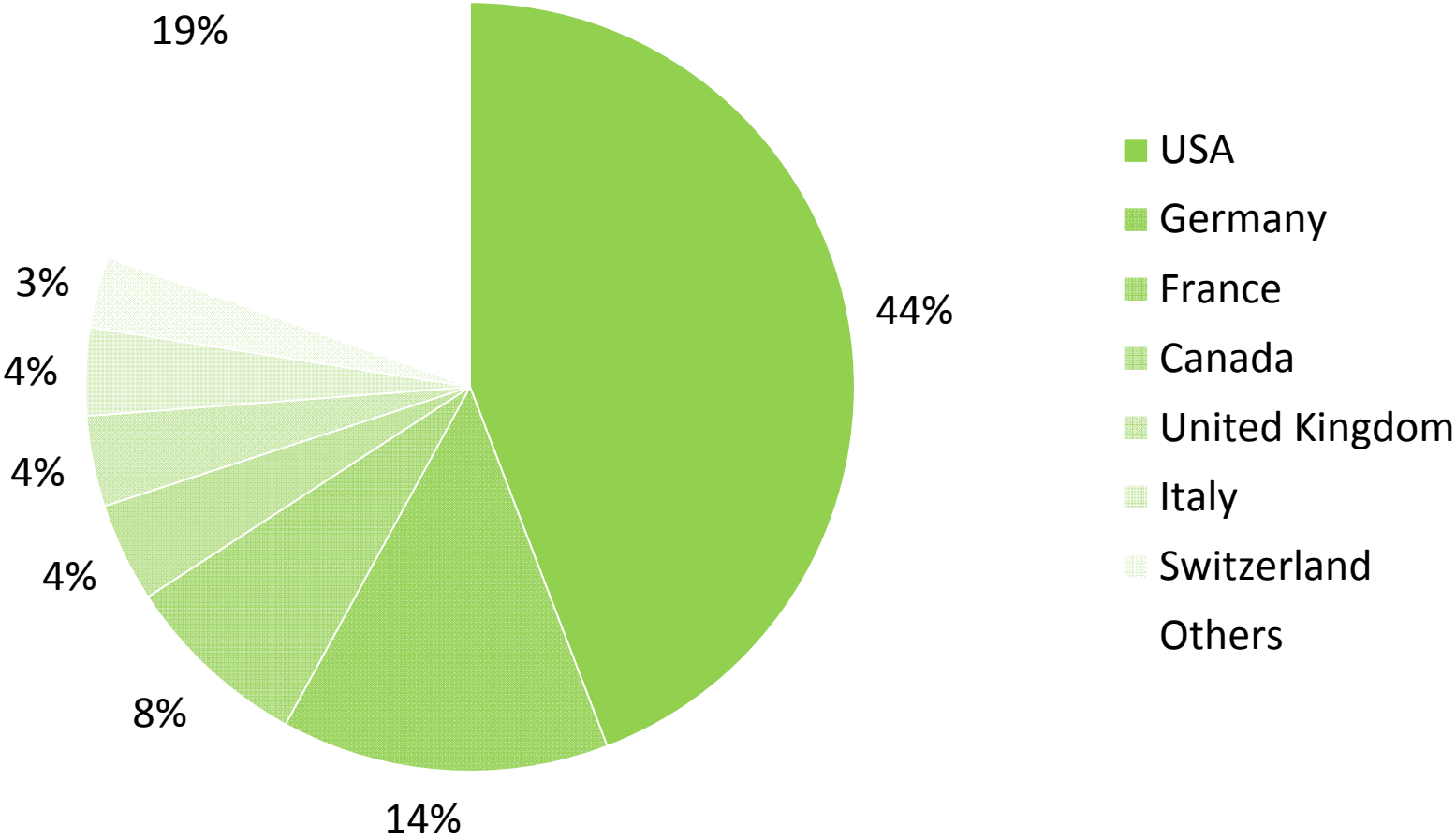
## The European market for organic food and drink: The countries with the highest sales 2012

Source: FiBL-AMI Surveys 2006-2014, OrganicDataNetwork Survey 2013



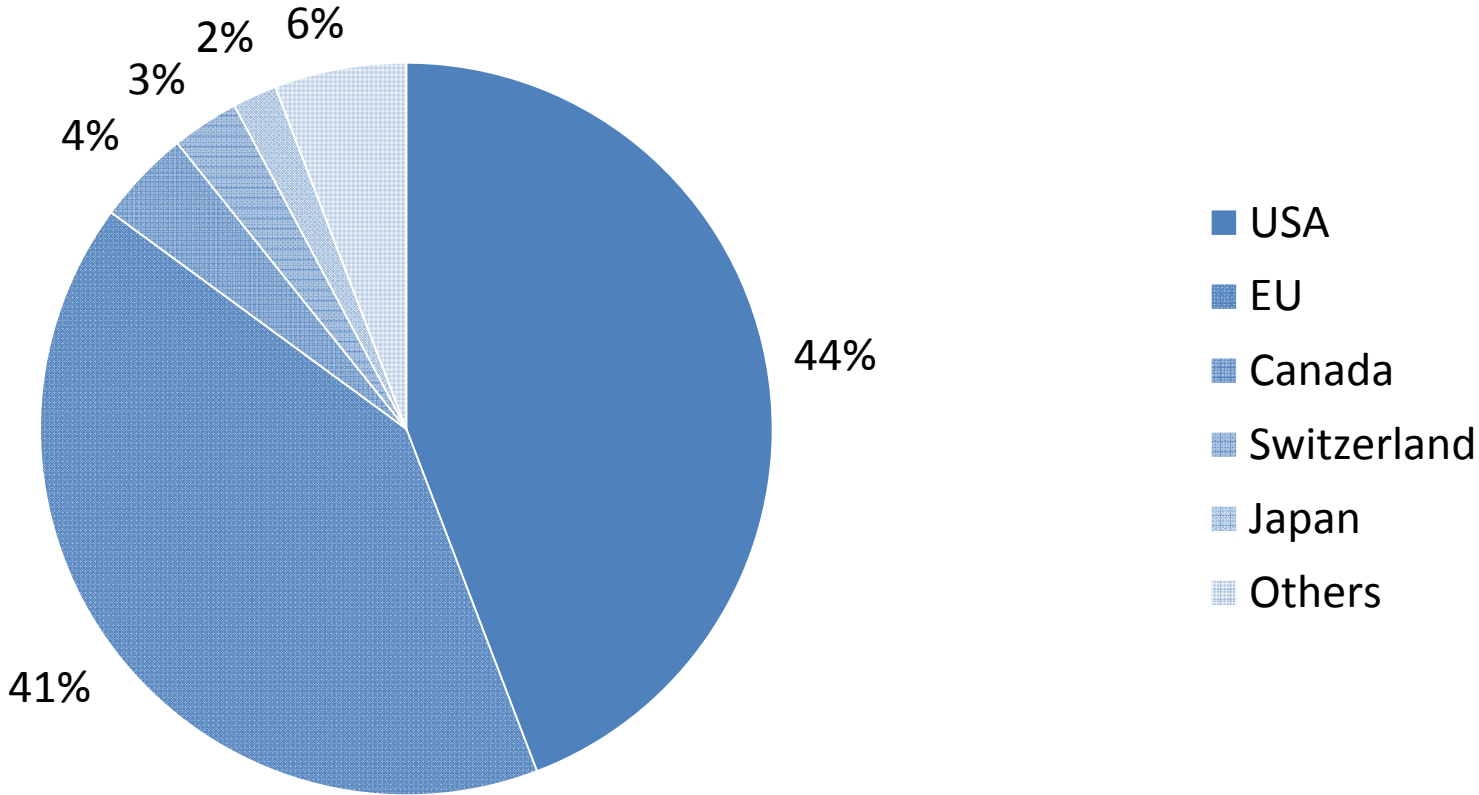
# Global market: Distribution of retail sales value by country

Source: FiBL-AMI-OrganicDataNetwork survey 2014, based on retail sales with organic food



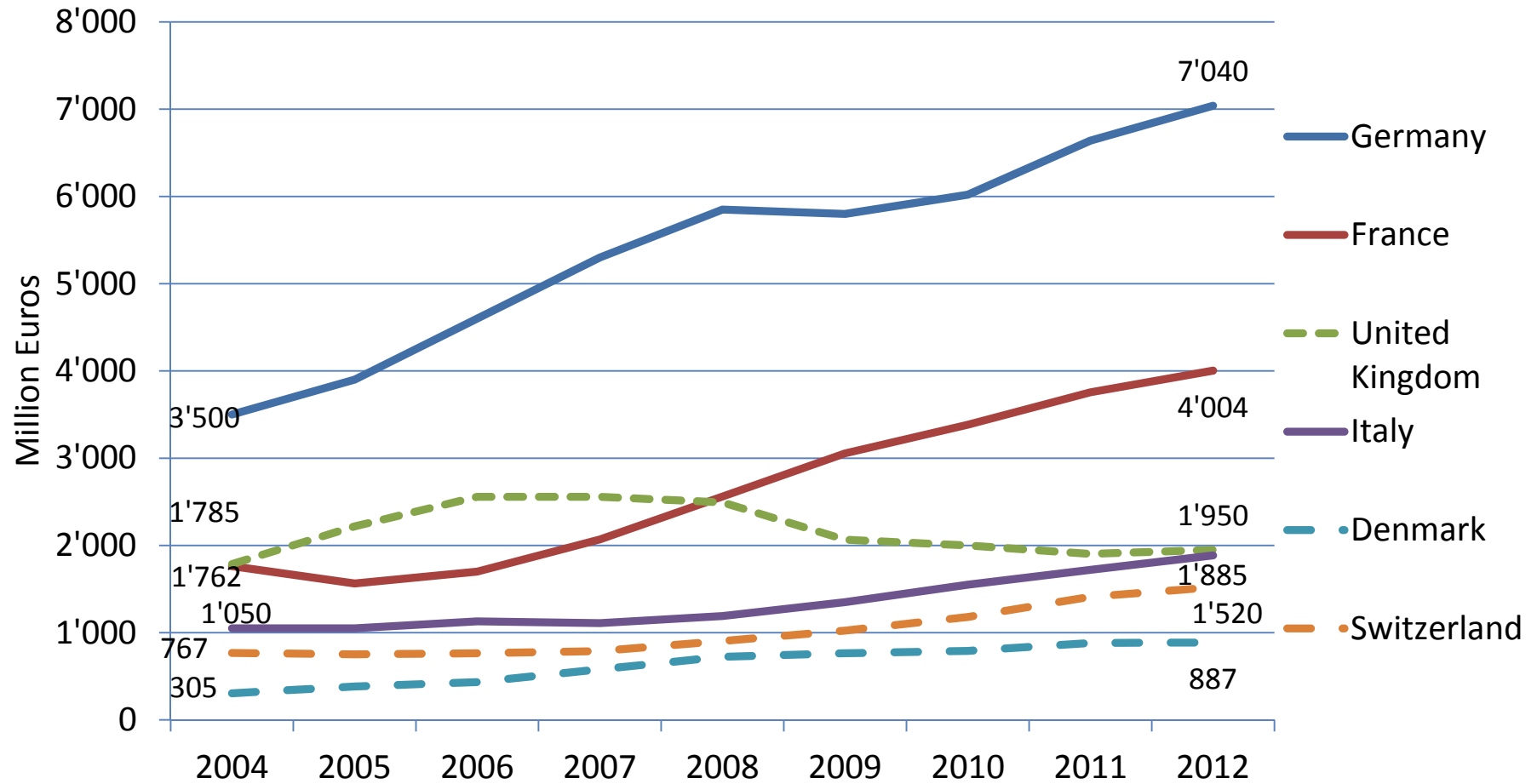
# Global market: Distribution of retail sales value by single markets 2012

Source: FiBL-AMI-OrganicDataNetwork survey 2014, based on retail sales with organic food



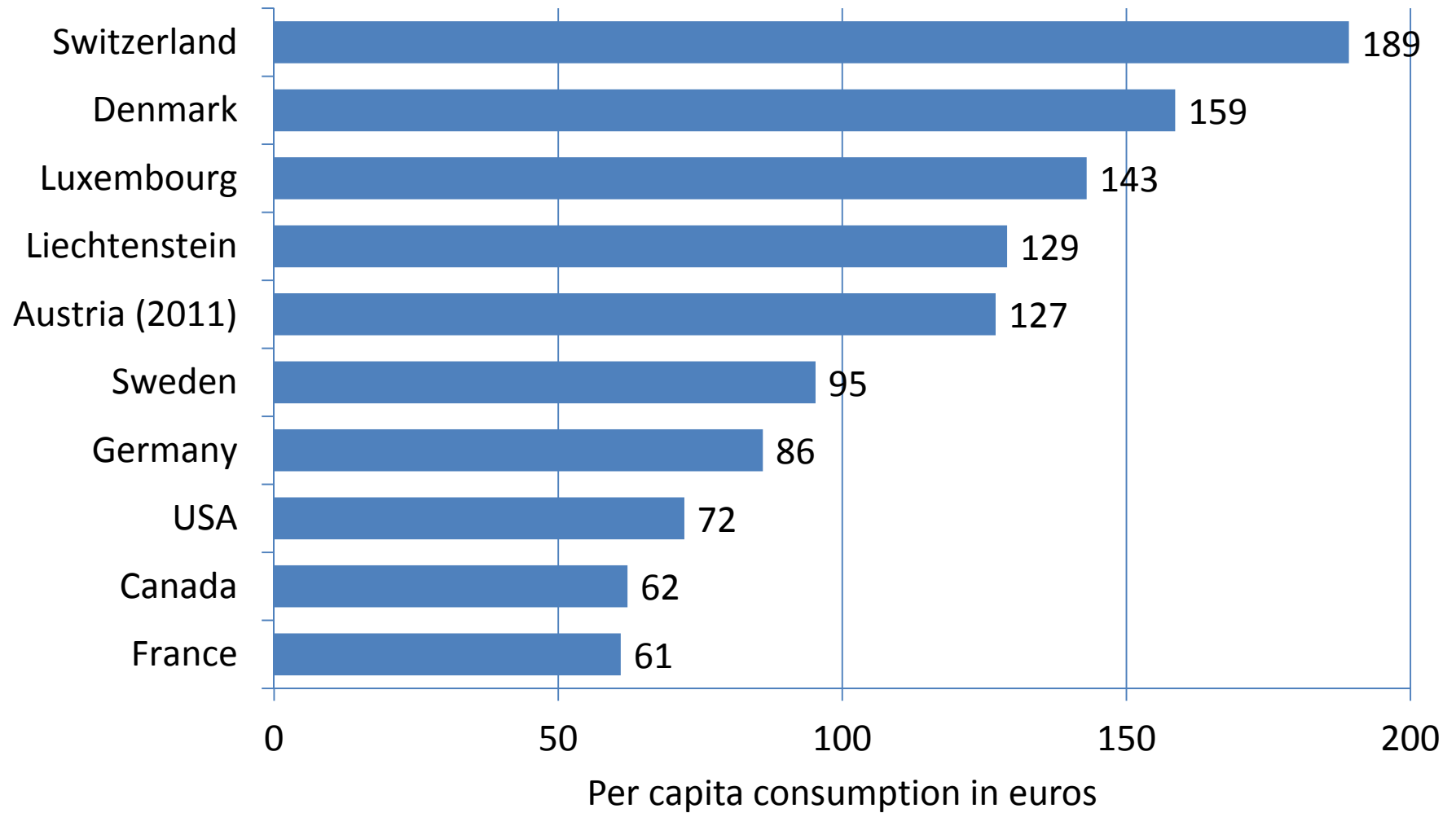
# Development of the Organic Market in Selected European Countries 2004-2012

Source: FiBL-AMI survey 2014



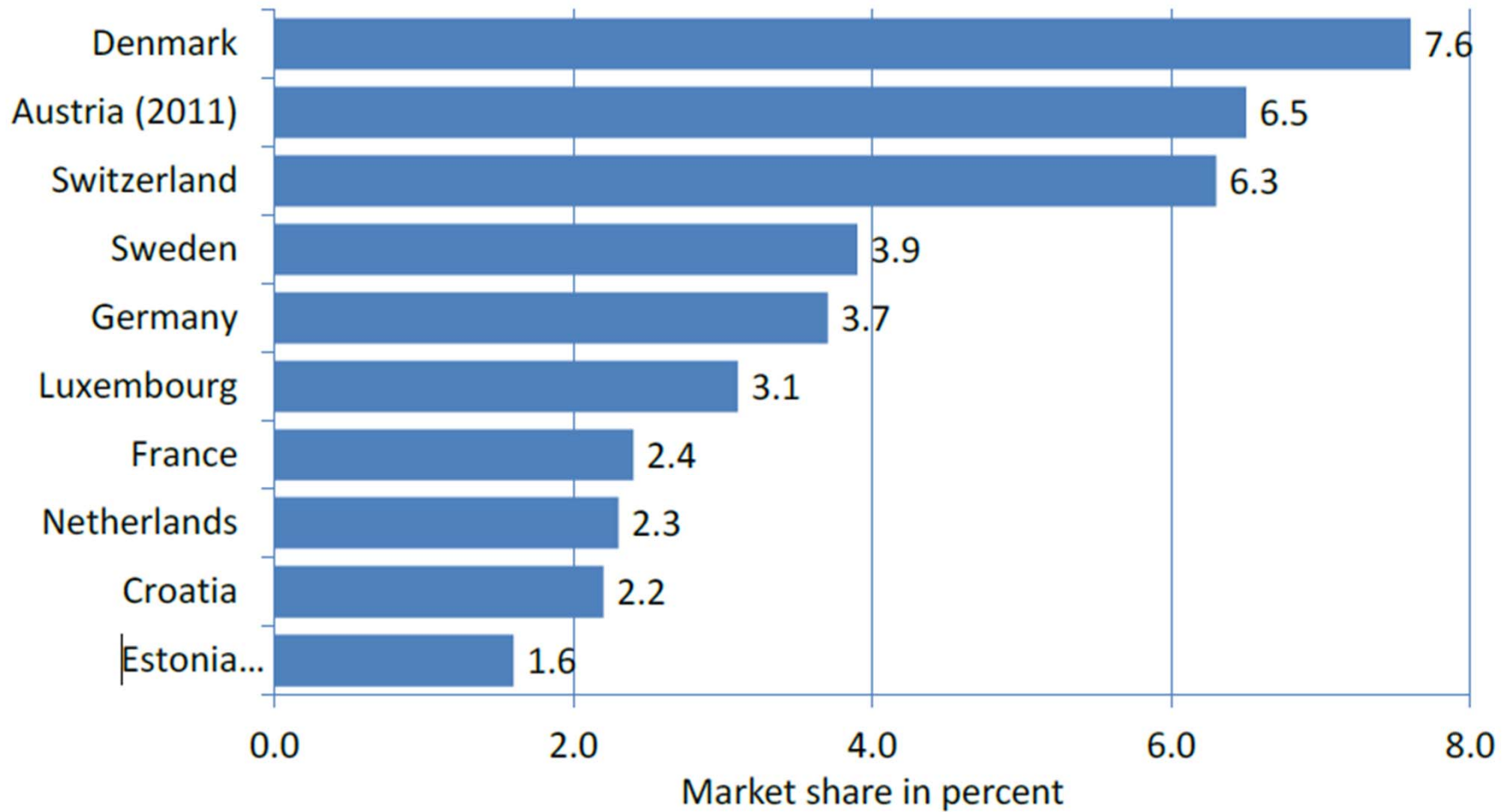
# The ten countries with the highest per capita consumption 2012

Source: FiBL-AMI-OrganicDataNetwork survey 2014



## Europe: The ten countries with the highest market share 2012

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI Survey 2014



# Conclusions

- › Both the organic area and the organic market grew by approximately 6 percent in 2012.
- › It is expected that both area and markets will continue to grow  
increasing demand, continued policy support, increasing research activities and the policy work of the IFOAM EU Group and TP Organics.
- › Major challenge: Domestic market development in many New EU Member States and the (Potential) Candidate countries.