



Demand for organic products in globally and in Europe

Results from the global survey on organic agriculture

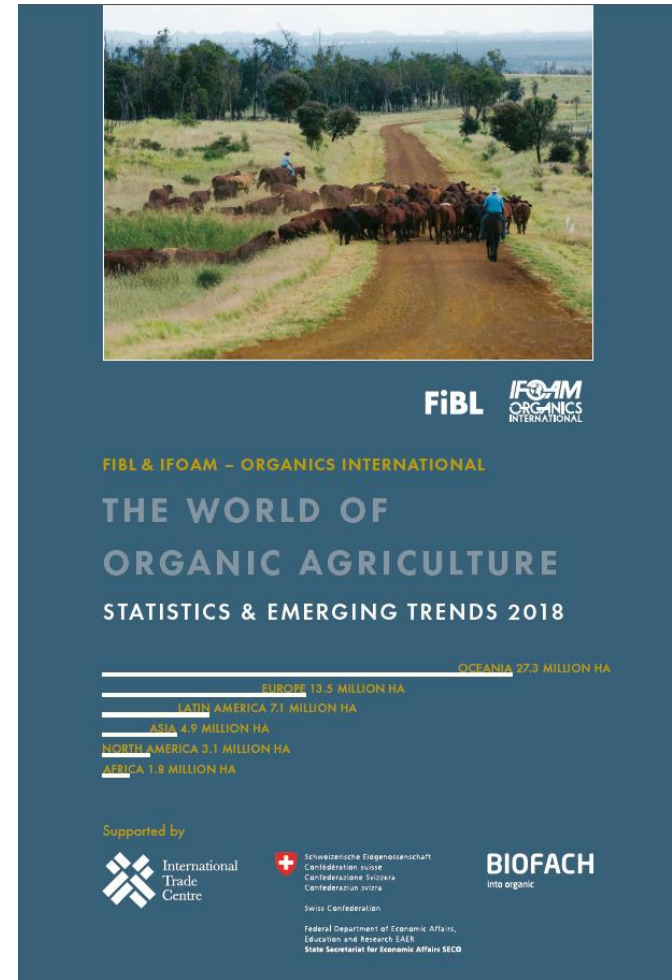
Julia Lernoud

Biofruit Congress - The first European Congress on organic fruits and vegetables
Madrid. October 24 and 25, 2018

The World of Organic Agriculture 2018

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
- Markets, standards, policy support
- www.organic-world.net
- statistics.fibl.org



Acknowledgements

- The Swiss State Secretariat of Economic Affairs SECO



- International Trade Centre ITC



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



- IFOAM – Organics International



- 200 experts from all parts of the world contributed to the FiBL survey 2018.

The World of Organic Agriculture 2016

Organic Farmland 2016



57.8 m ha

Organic farmland in million hectares

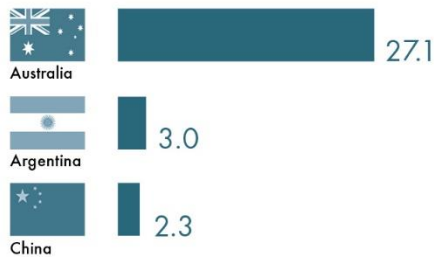
+15%

From 2015

178

Countries with organic farming

Top 3 countries (land in million of hectares)



Organic Producers 2016

The number of organic producers is increasing

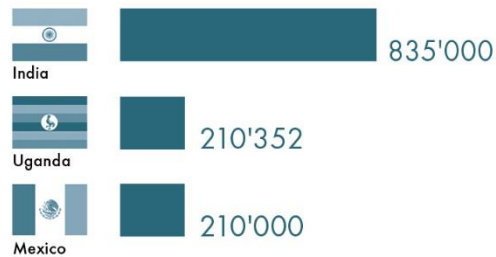
2.7 million

Organic farmers

+12.8%

From 2015

Number of producers: Top 3 countries



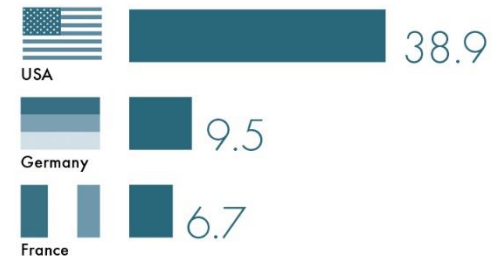
Organic Market 2016

The global market is growing and consumer demand is increasing

More than 80

Global organic food market in billion euros

Top 3 countries (market in billion euros)



Ireland

21.8%

Organic market growth



Denmark

9.7% Market share



Switzerland

274 € Highest per capita spending is in Switzerland

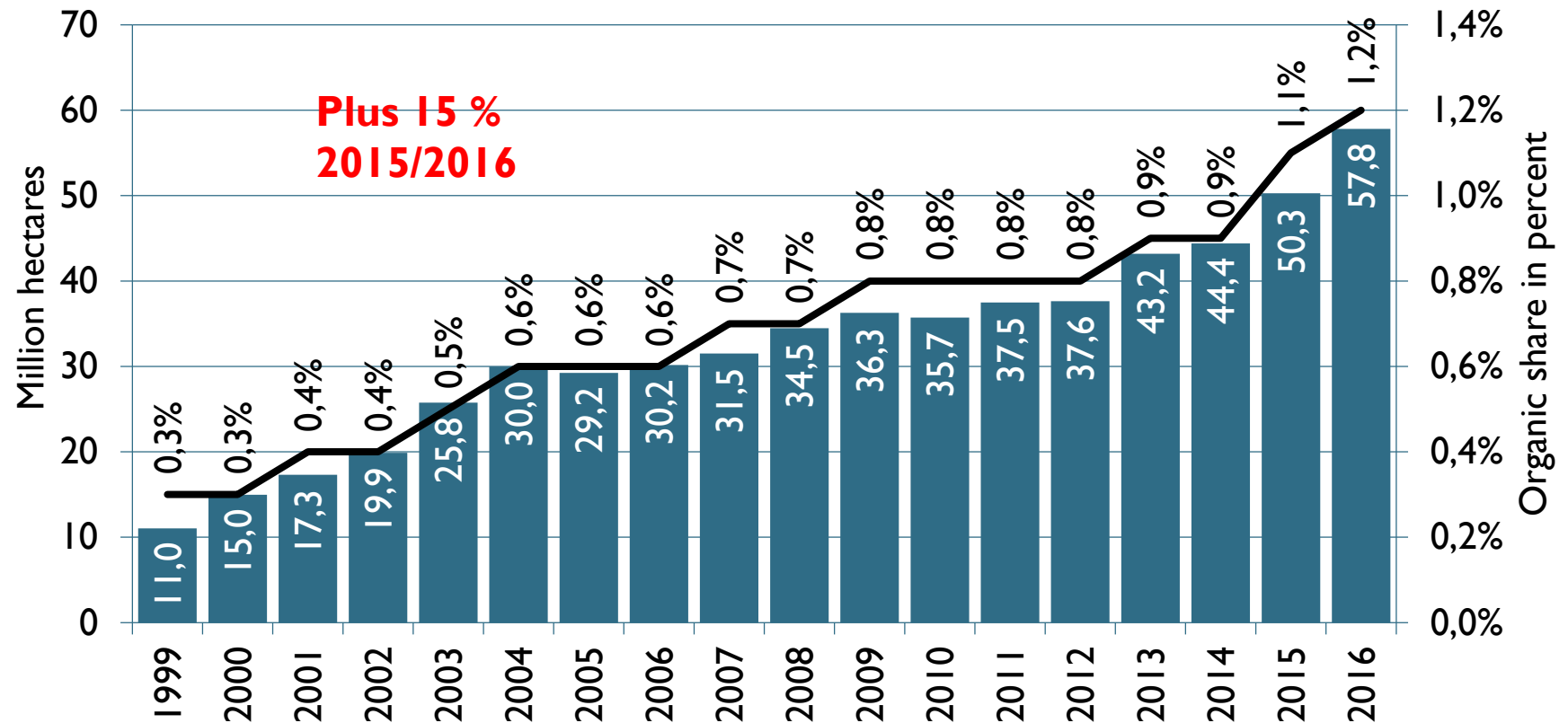
Key data/indicators related to area and producers 2016

- 178 countries have data on organic agriculture.
- 57.8 million hectares of agricultural land are organic (including conversion areas).
- 7.5 million hectares (or 15 %) more than in 2015
- 1.2 percent of the agricultural land is organic
- 15 countries have 10 percent or more organic agricultural land
- 2.7 million producers were reported
- More than 80 million euros of organic retail sales
- The United State has the largest organic market with 38.9 billion euros
- Switzerland has the hieghst per capita consumption in the world, 274 euros
- Denmark has the hieghts organic share of the total market, 9.7%
 - Ireland experienced the largest growth of its organic market, 21.8%

World: Growth of the organic farmland and organic share 1999-2016

Growth of the organic agricultural land and organic share 1999-2016

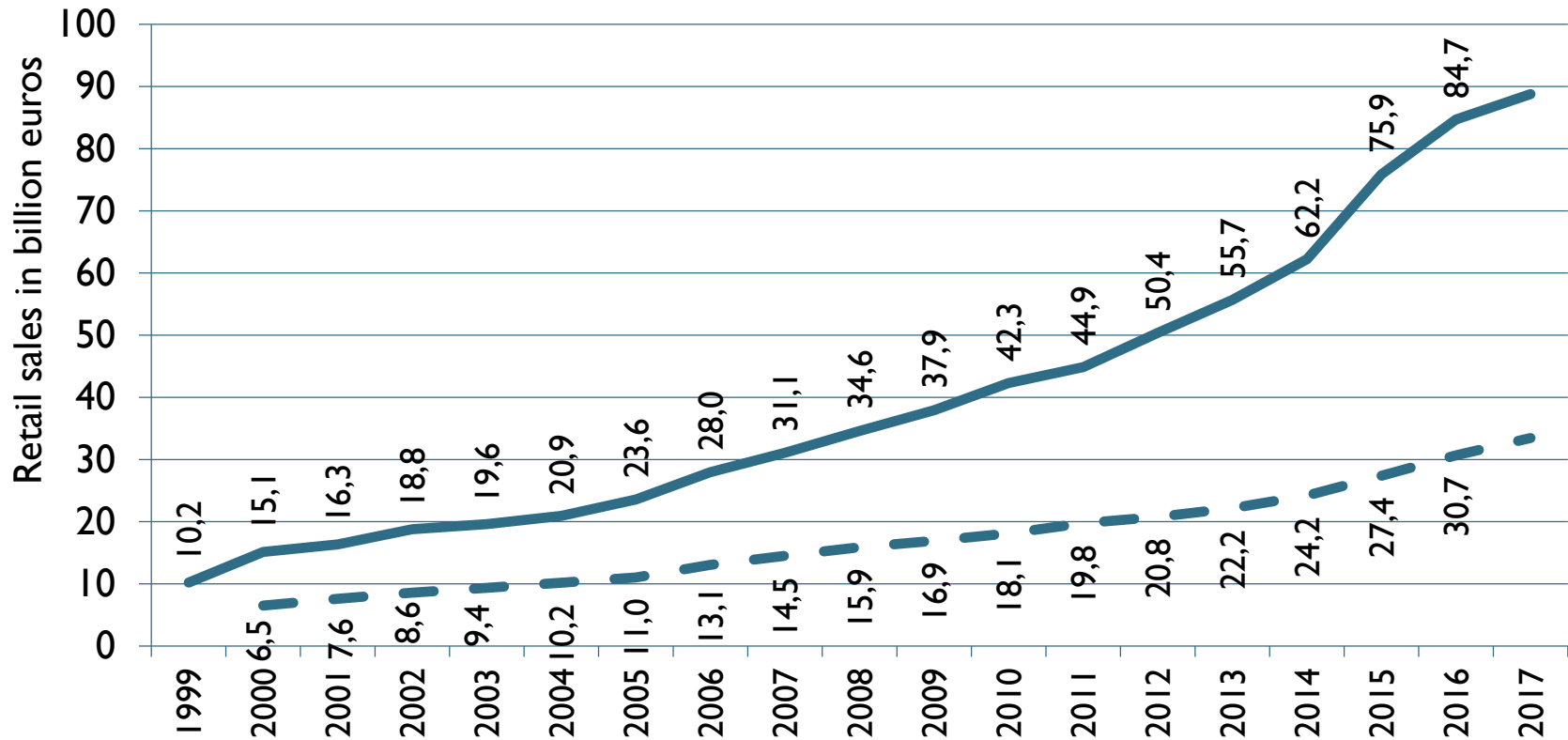
Source: FiBL-IFOAM-SOEL surveys 1999-2018



Development of organic retail sales worldwide and in the European Union 1999-2017

Development of the organic retail sales worldwide and in the EU 1999-2017

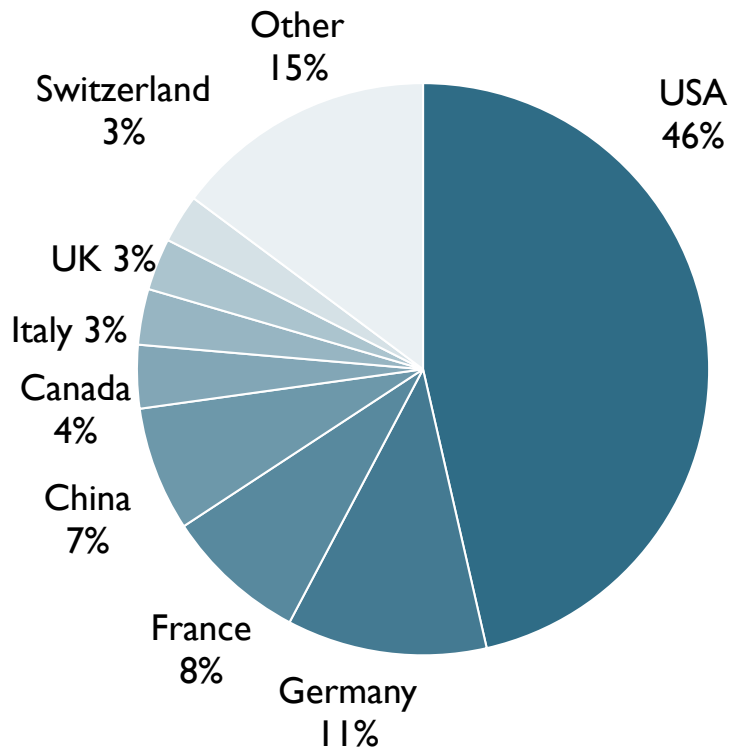
Source: FiBL surveys 2002-2018; Please note that for the years prior to 2005 data may not be complete



World: Distribution of organic retail sales 2016

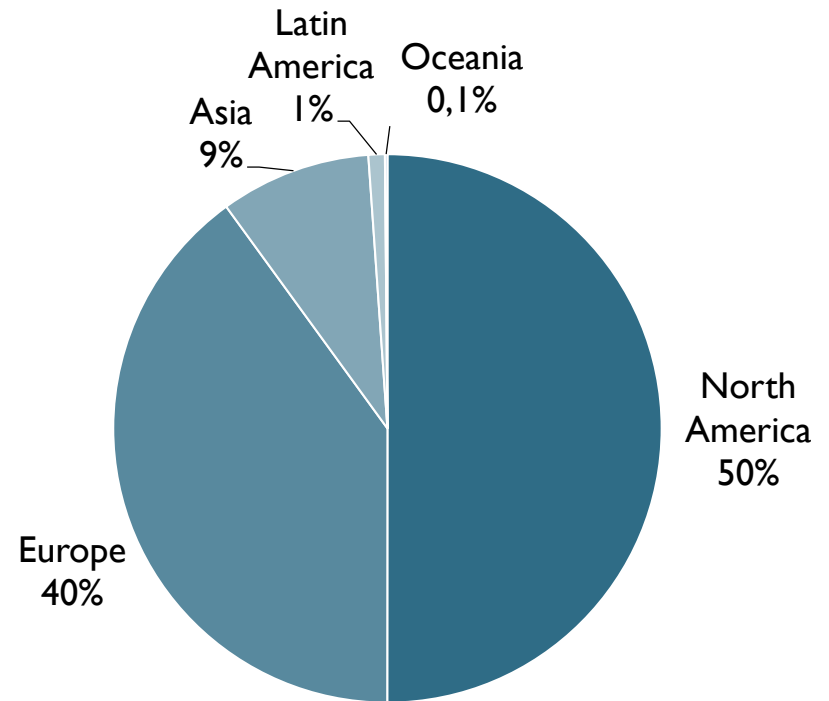
Global market: Distribution of retail sales value by country 2016

Source: FiBL-AMI survey 2018, based on retail sales with organic food



Global market: Distribution of retail sales value by region 2016

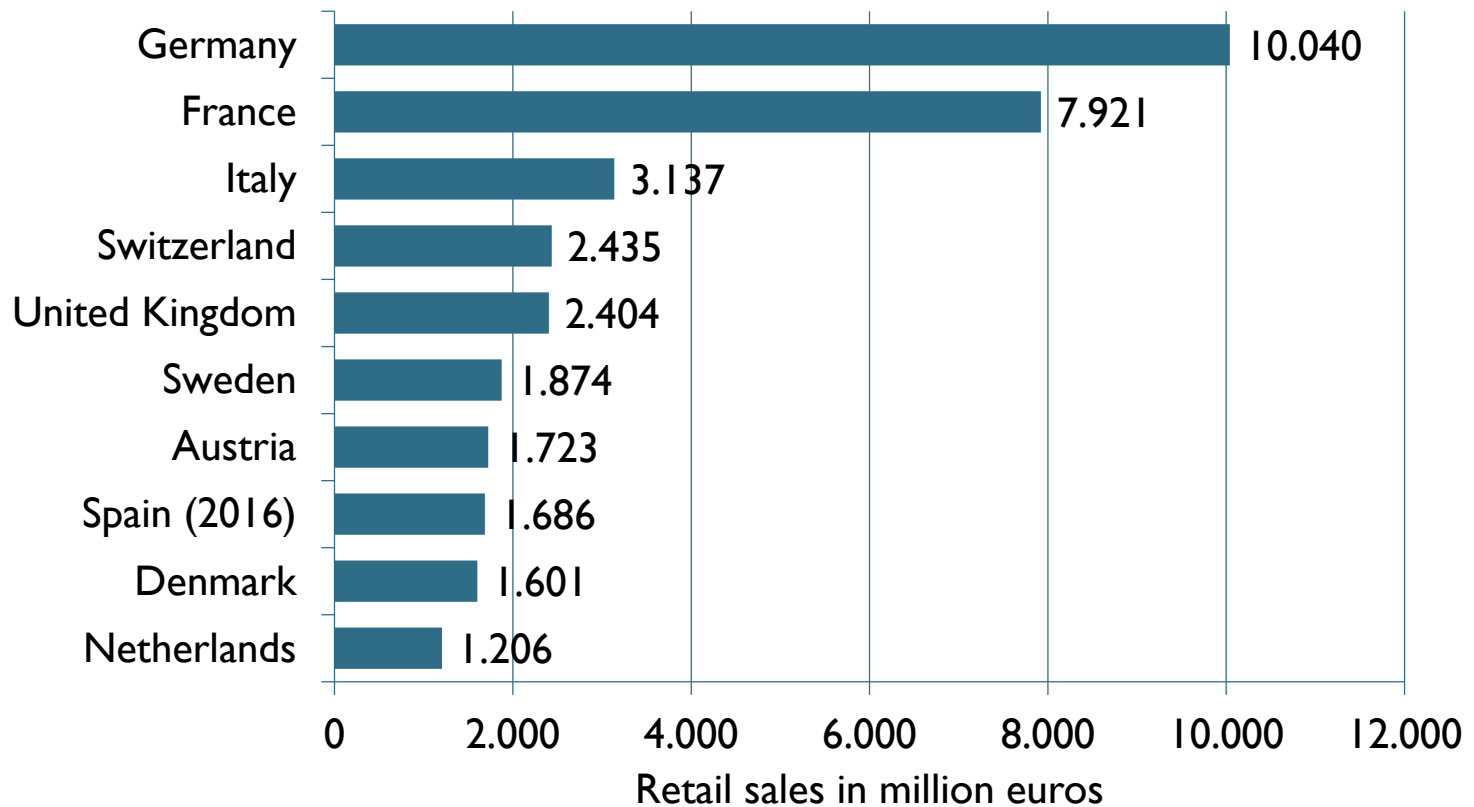
Source: FiBL-AMI survey 2018, based on retail sales with organic food



The largest markets for organic food in Europe 2017

The ten countries with the largest markets for organic food in Europe 2017

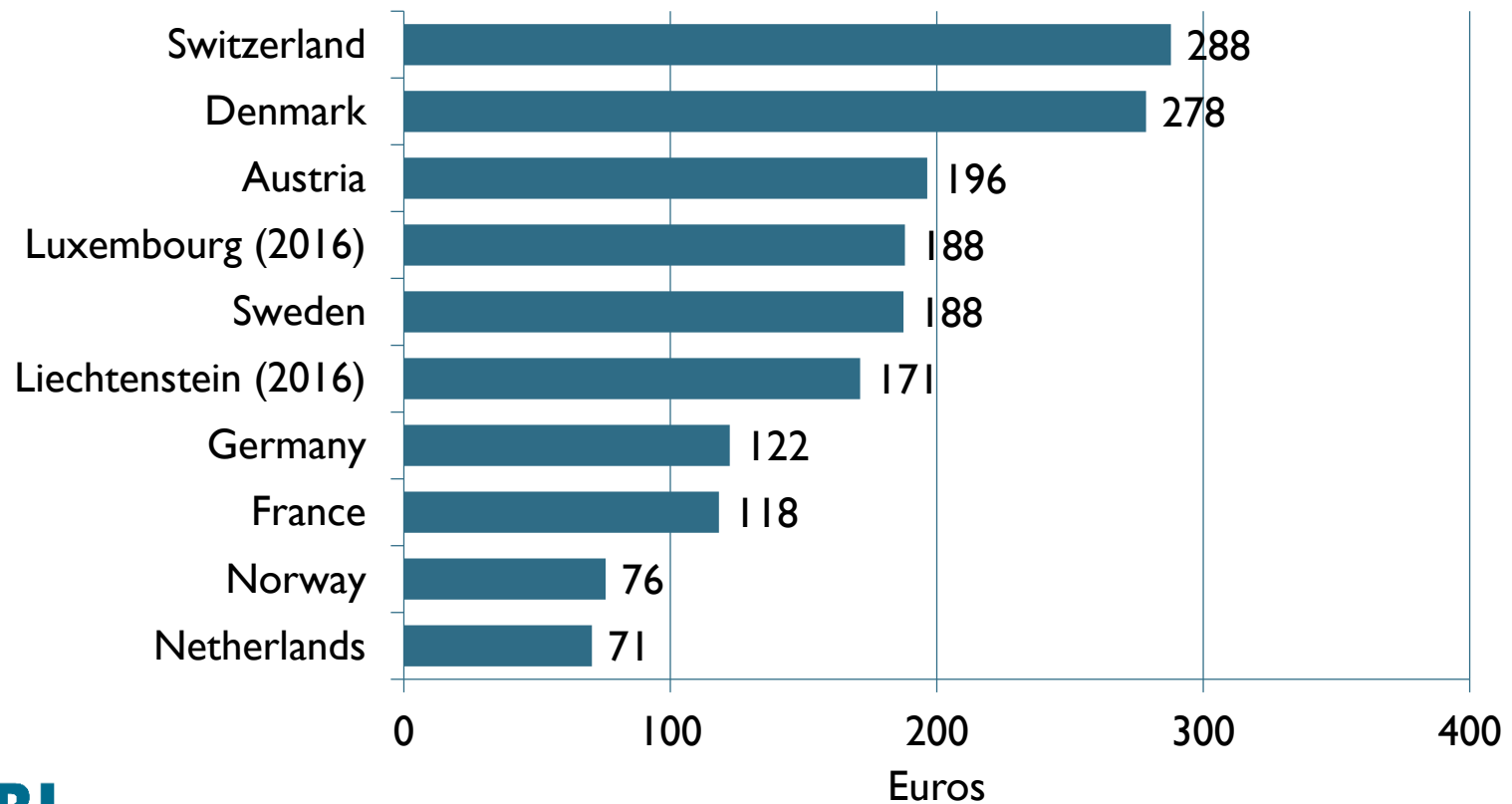
Source: FiBL-AMI survey 2018



The largest per capita consumption of organic food in Europe 2017

European countries with the highest per capita consumption of organic food 2017

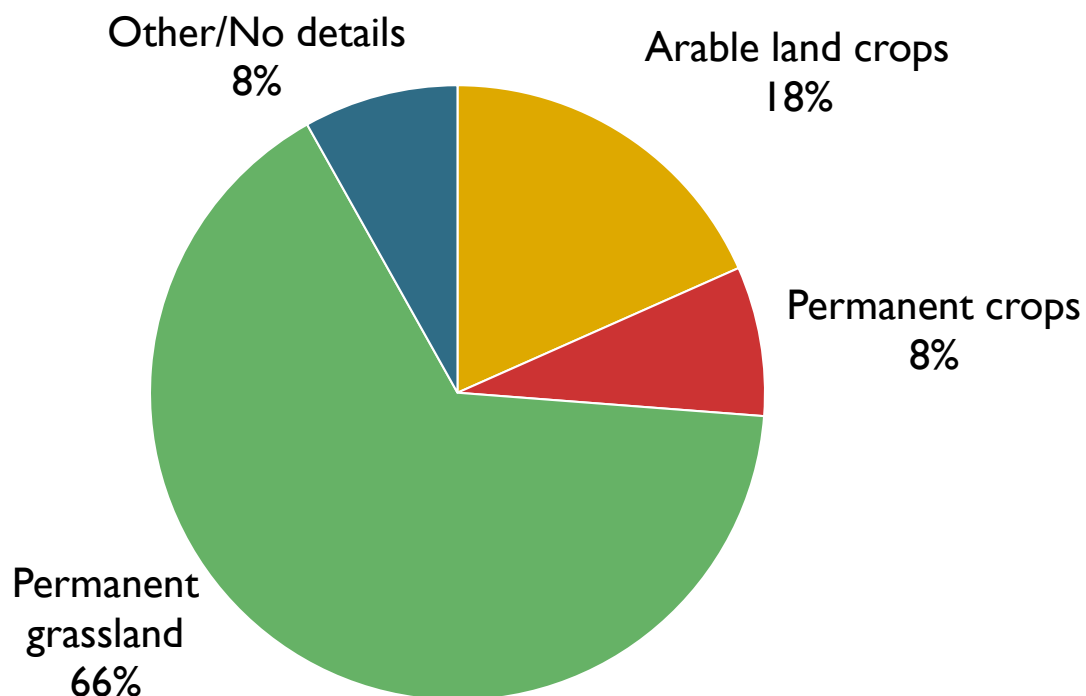
Source: FiBL-AMI survey 2018



World: Use of organic agricultural land 2016 (total: 57.8 million hectares)

Distribution of main land use types and crop categories 2016

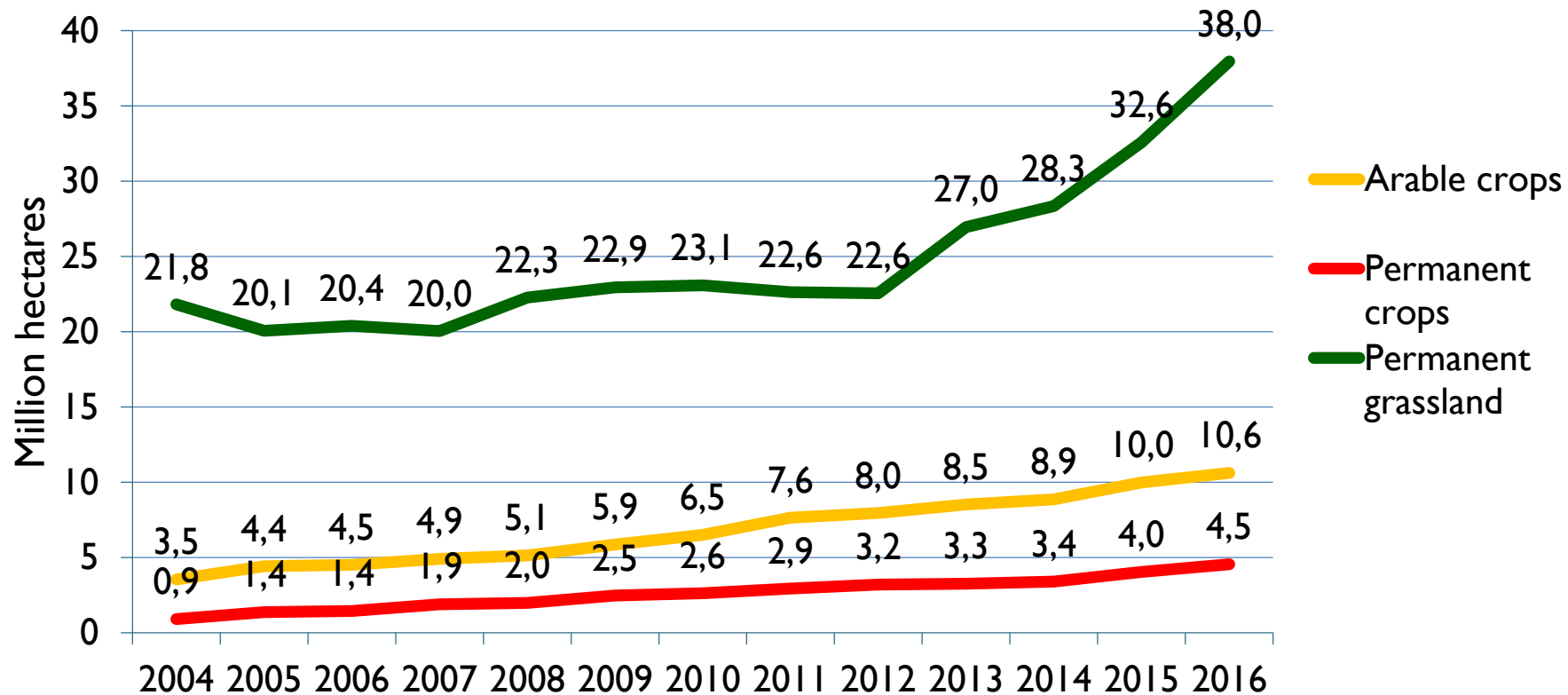
Source: FiBL survey 2018; based on information from the private sector, certifiers, and governments.



Development of land use types in organic agriculture 2004-2016

Development of the organic land by land use type 2004-2016

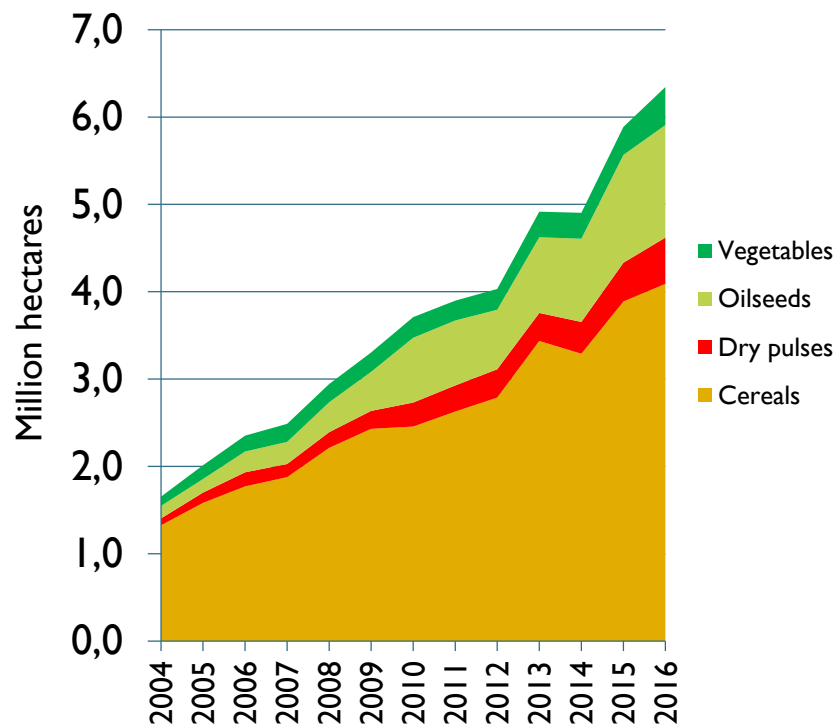
Source: FiBL-IFOAM-SOEL-Surveys 1999-2018



Development of organic arable and permanent crops/crop groups 2004-2016

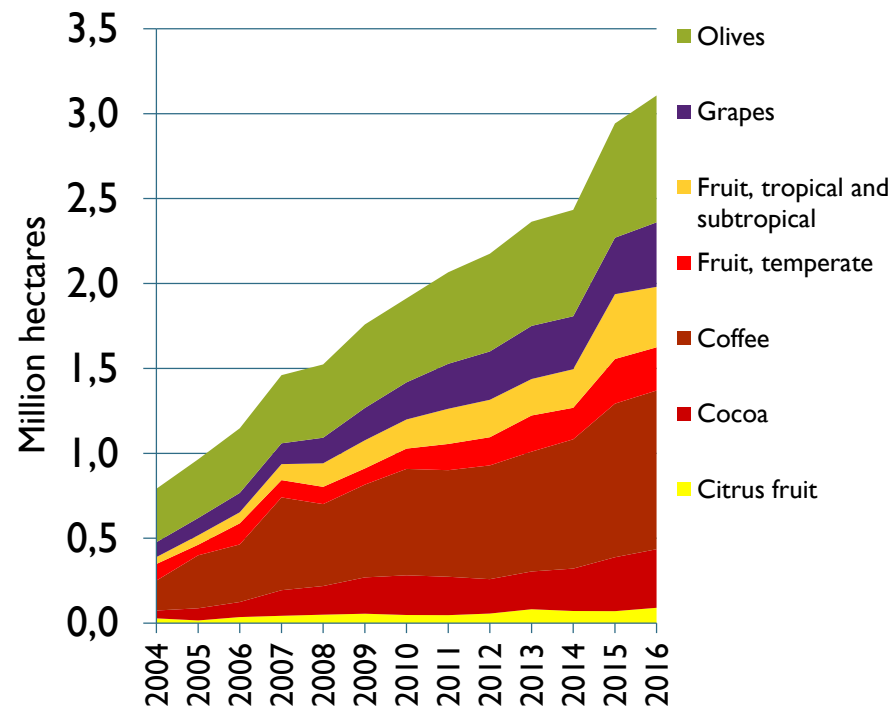
Development of organic arable crop groups 2004-2016

Source: FiBL-IFOAM-SOEL survey 2006-2018



Development of organic permanent crops/crop groups 2004-2016

Source: FiBL-IFOAM-SOEL survey 2006-2018



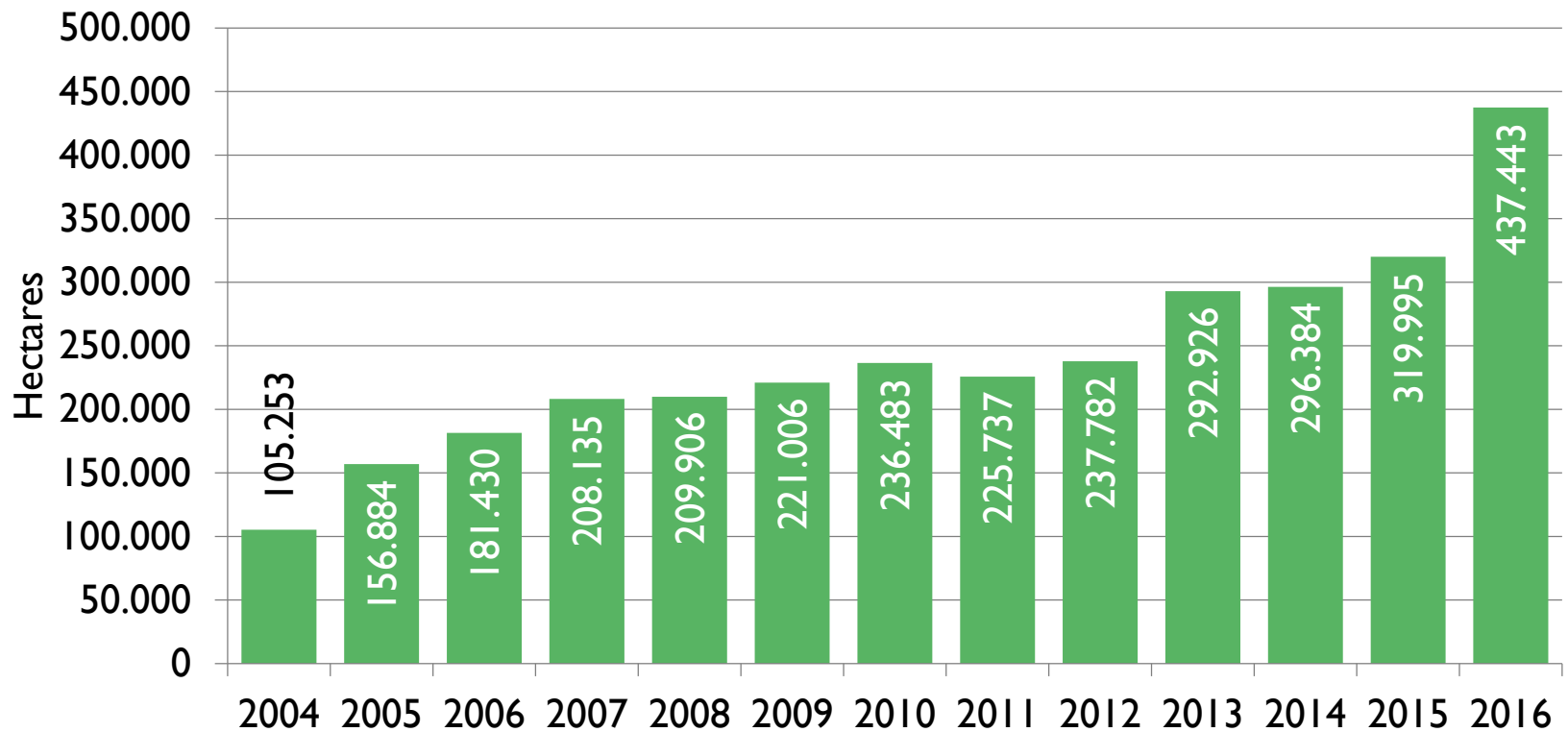
Organic vegetables worldwide 2016

- More than 437'000 hectares of organic vegetables, representing 0.7% of the total vegetables area worldwide.
- Four most important vegetable-growing countries in the world: China, India, Nigeria, and Viet Nam; data on the organic area was only available for China and Viet Nam.
- Highest organic shares: Denmark, Austria, Canada, Switzerland, and Mexico.
- These are also the countries in Europe that have the largest organic market shares for organic food.
- Sweden and Bulgaria reported high organic shares of the total vegetable area.
- The major increase in 2016 is mainly due to a substantial increase of the vegetable area in Mexico.

Organic vegetables: Growth of the organically managed land 2004-2016

Vegetables: Development 2004-2016

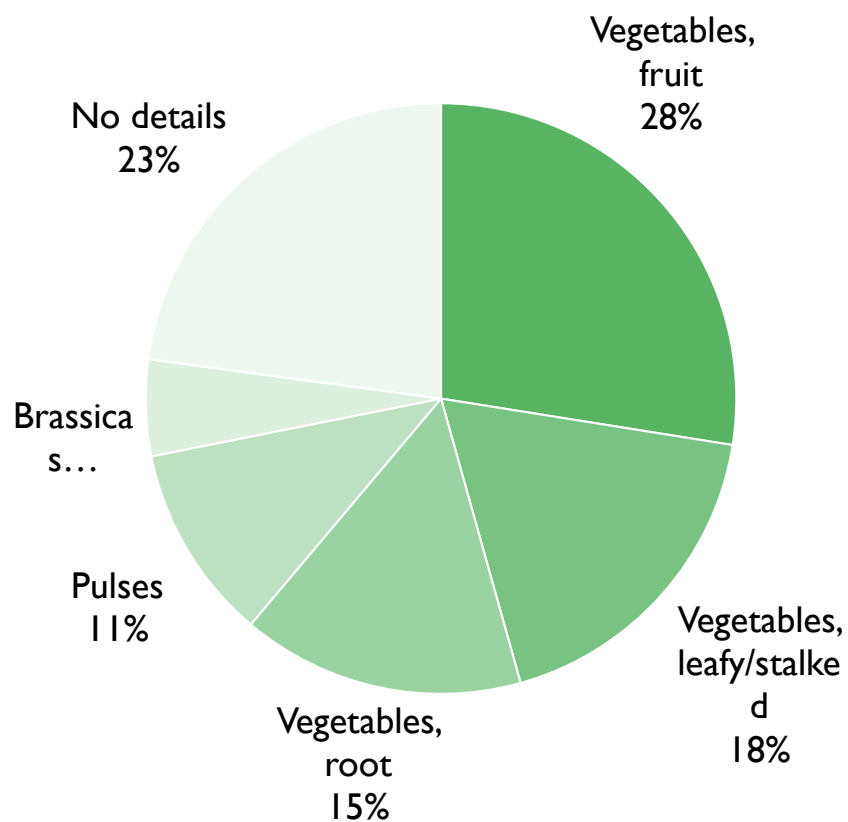
Source: FiBL-IFOAM-SOEL-Surveys 2006-2018



Organic vegetable area by vegetable group and by region 2016

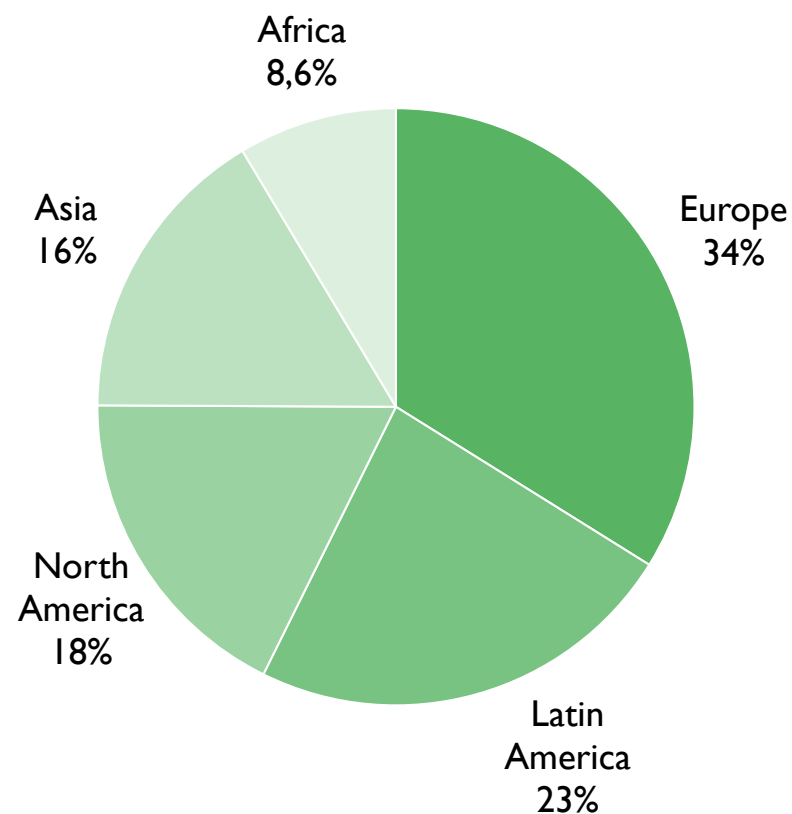
Organic vegetables by group 2016

Source: FiBL survey 2018



Organic vegetables by region 2016

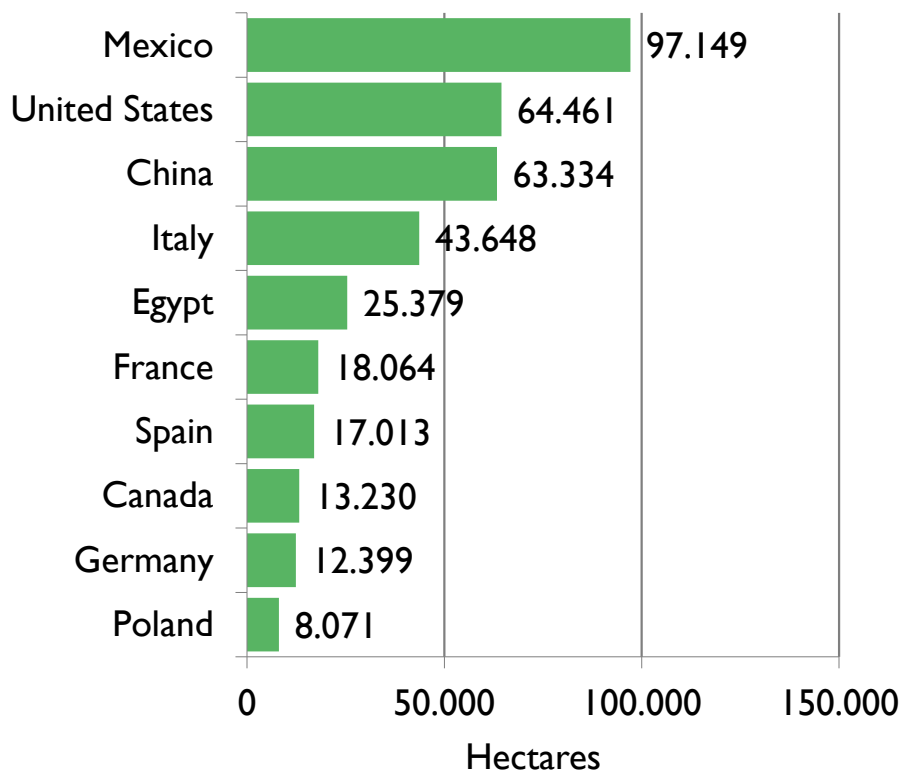
Source: FiBL survey 2018



Organic vegetable area: The ten leading countries 2016

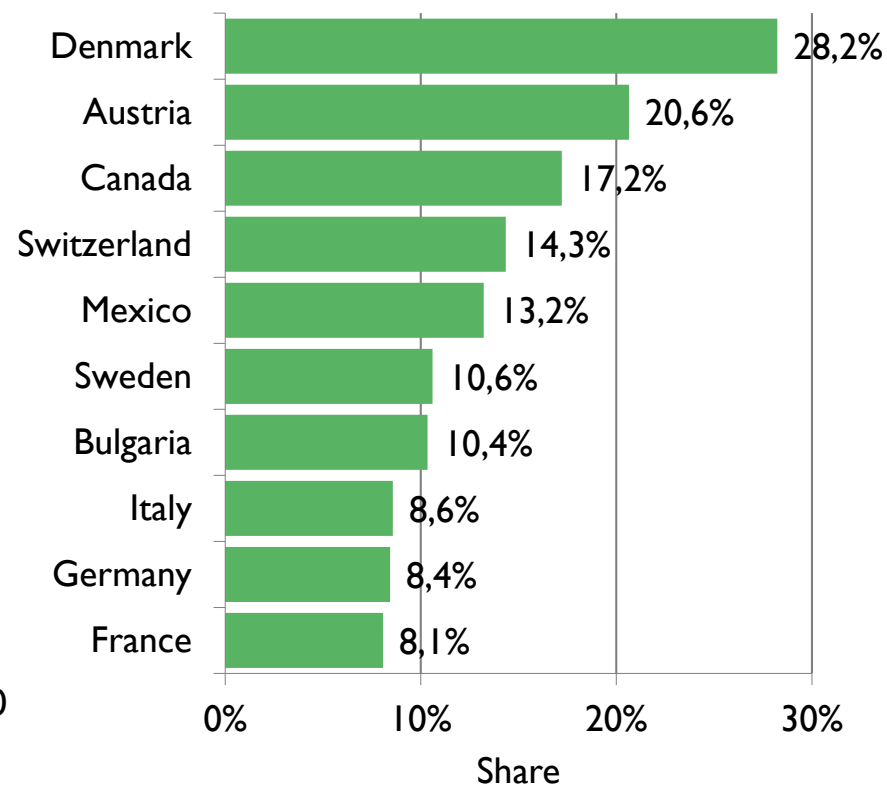
Vegetables: The ten countries with the largest organic area 2016

Source: FiBL survey 2018



Vegetables: The ten countries with the highest organic shares 2016

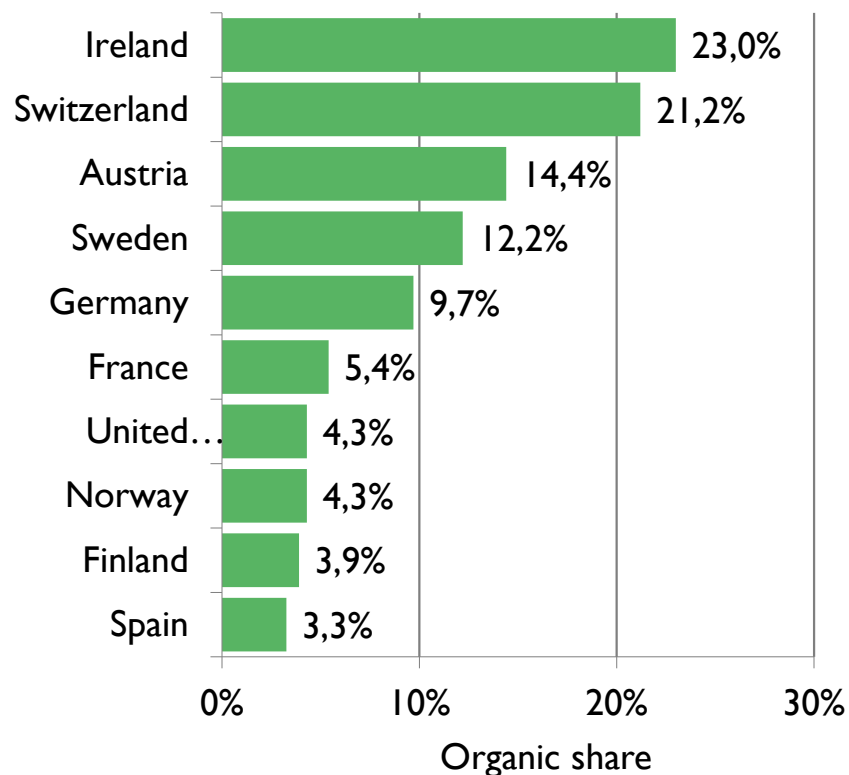
Source: FiBL survey 2018



Organic vegetable and fruits sales: The leading countries 2016

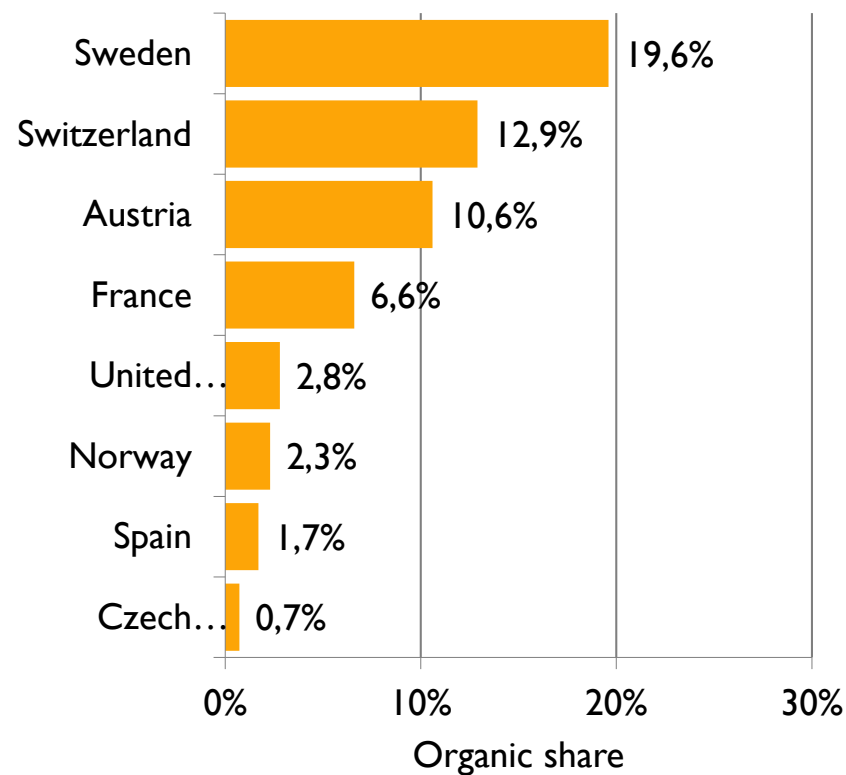
Vegetables: The countries with the largest organic area 2016

Source: FiBL survey 2018



Fruits: The countries with the highest organic shares 2016

Source: FiBL survey 2018



Organic market share of total retail sales 2016

Table 59: Organic shares for retail sales values (euros) for selected products 2016

	Austria	Belgium (2015)	Czech Republic (2015)	Finland	France (2016)	Germany	Ireland	Nether- lands	Norway	Sweden	Switzer- land	UK
Beverages			0.3%		4.2%				0.3%	5.5% ¹	3.2%	
Bread and bakery products		1.9%	0.4%	1.0%	2.9%	7.7%		1.6%	1.5%	3.7%	20.7%	0.4%
Eggs	20.1%			15.4%	27.0%	19.4%	5.2%	14.1%	8.1%		25.5%	6.8%
Fish and fish products					2.3%			1.4%	0.5%			0.7%
Fresh vegetables	14.4%	6.0%		3.9% ²	5.4%	9.7%	23.0%	4.1% ³	4.3%	12.2%	21.2%	4.3%
Fruit	10.6%	3.9%	0.7%		6.6%	7.8%			2.3% ⁴	19.6%	12.9%	2.8%
Meat and meat products	0.0%	1.0%	0.2%	1.1%	2.0%	2.0%	0.0%		0.1%	0.2%	0.0%	1.1%
Milk and dairy products	10.4%	2.7%	1.0%		4.0%			4.1%	1.9%	11.0%	12.6%	3.8%
- Butter	9.3%	4.1%			6.3%	4.7%			3.1%			2.0%
- Cheese	8.9%	1.0%		1.5%	1.5%	4.4%			0.6%		6.5%	1.1%
- Milk	17.9%	3.0%		4.1%	12.5%	12.1%	4.3%		4.3%			5.9%
Yoghurt		7.2%		1.9%	4.8%	7.7%	18.3%		0.4%			8.2%

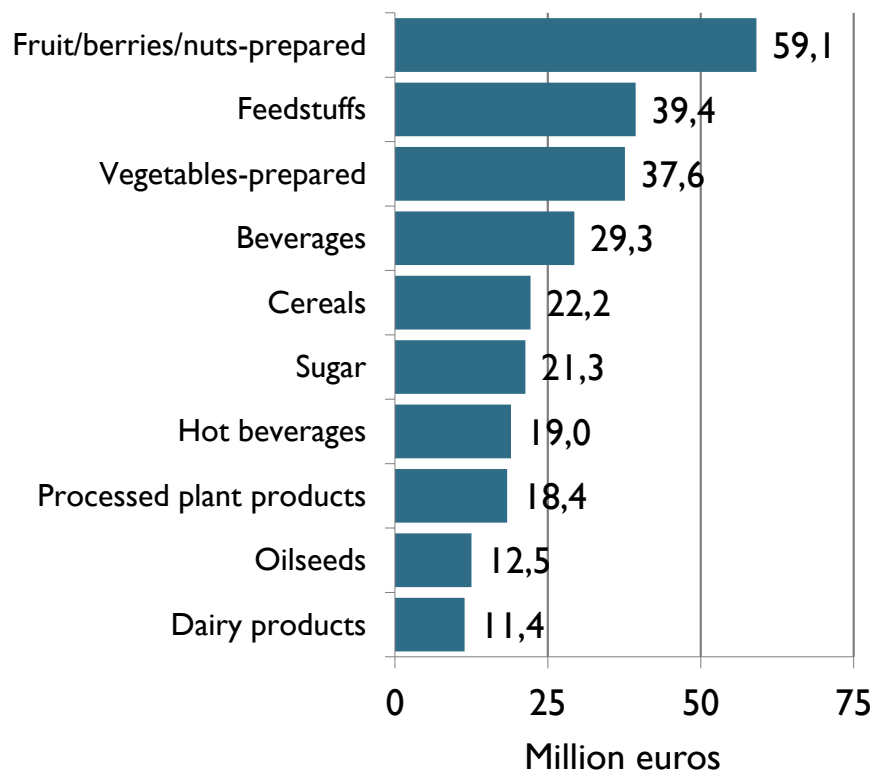
Sources: FiBL-AMI survey 2018, based on data from: Austria: RollAMA based on GfK; Belgium: LV based on GfK; Czech Republic: UZEL; Finland: Pro Luomu; France: Agence Bio; Germany: Agricultural Market Information Company based on GfK; Netherlands: Bionext; Norway: Nielsen Norway; Sweden: Statistics Sweden; Switzerland: Bio Suisse; UK: Soil Association.

Note: Due to classifications and nomenclature differing from country to country, it is not possible to supply data for all product groups, even if data for individual products may be available. Not all countries have data on the market shares of organic products. Please note that groups are not complete; the products shown in the table above are a selection.

Denmark: Organic imports and retail sales by product, 2016

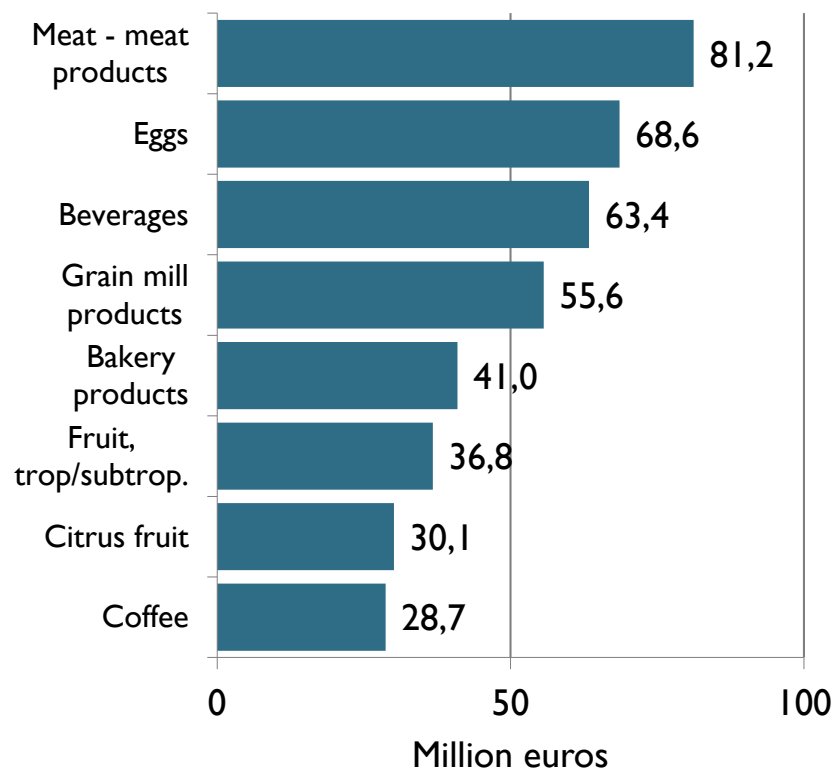
Denmark: Import of organic products – Top 10, 2016

Source: Statistics Denmark 2016



Denmarks: Organic retail sales by product – Top 10, 2016

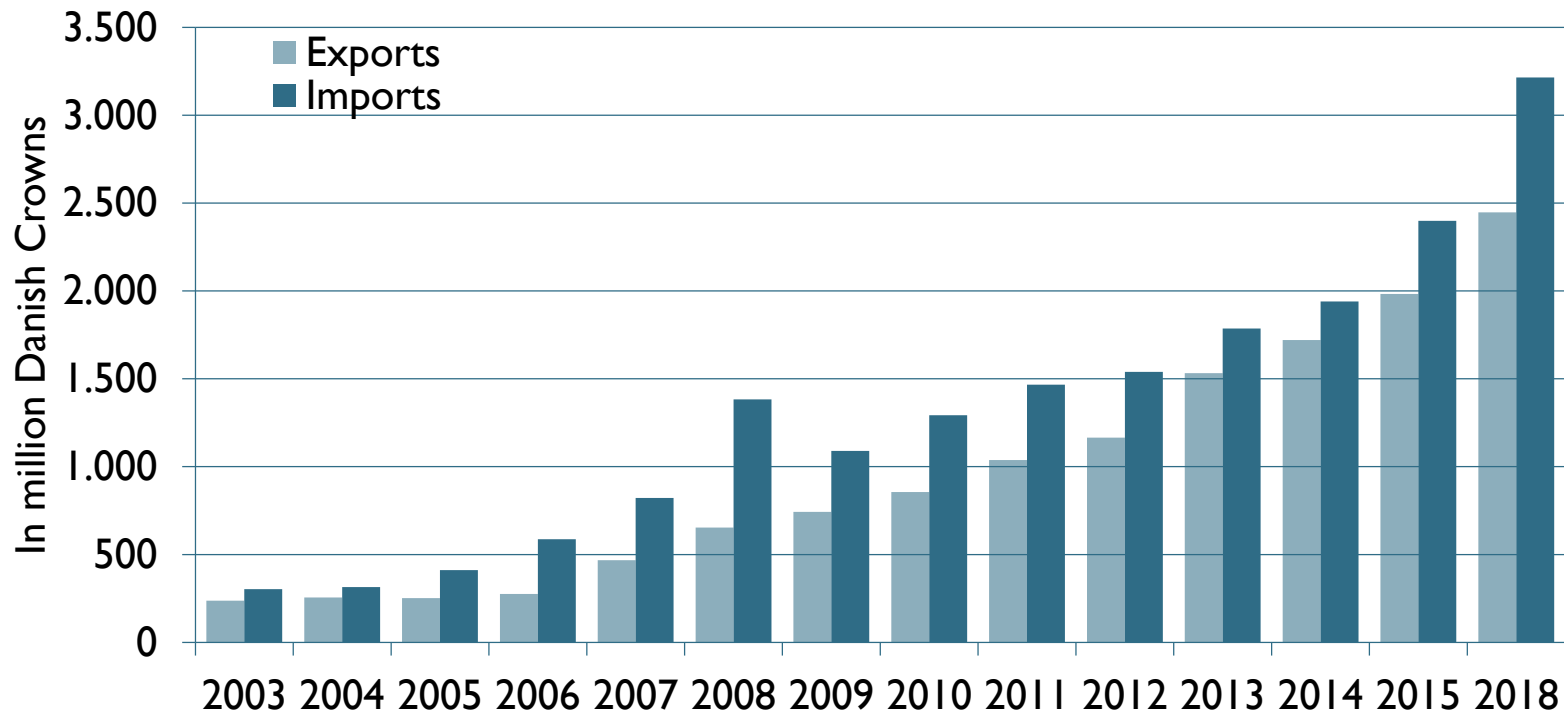
Source: Statistics Denmark 2016



Denmark: Organic exports and imports

Denmark: Organic exports -imports 2003-2016

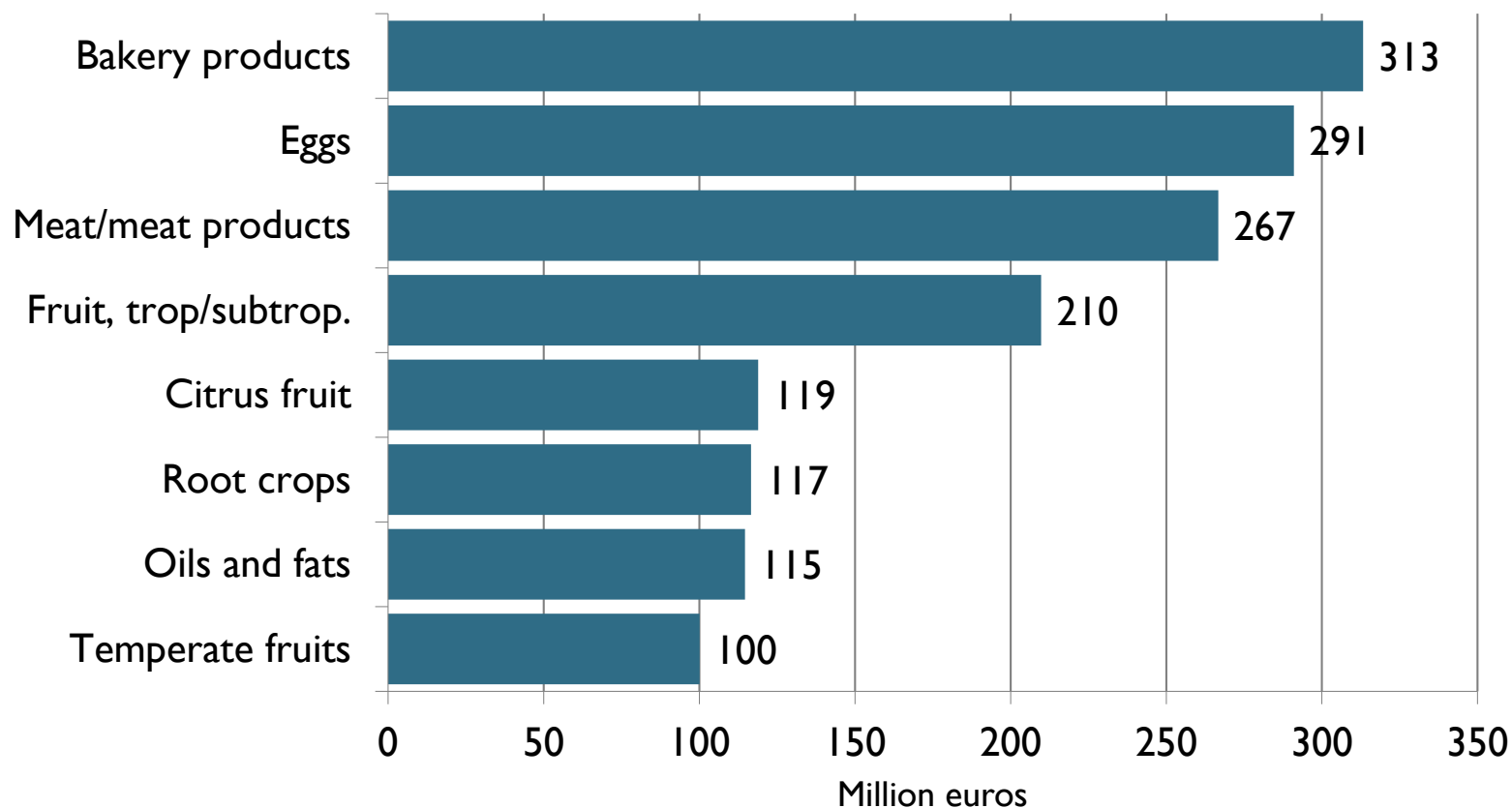
Source: Statistics Denmark



Germany: Organic retail sales by product, 2016

Germany: Organic retail sales by product – Top 10, 2016

Source: AMI 2017



Challenges and outlook

- The positive trend continues and we see a growth of the organic market throughout Europe.
- Unfortunately, there's not enough data available to draw a whole picture for Europe on a product level.
- More access to data and more data collection efforts would increase market transparency and create more opportunities.
- Organic fruits and vegetables have a high share in many European countries. However, other products show greater organic shares.

Resources

- **«The World of Organic Agriculture» at www.organic-world.net**
- **Slides and infographics at www.organic-world.net**
- **Twitter.com/fiblstatistics**
- **Interactive maps at www.organic-world.net**
- **Interactive data tables at www.statistics.fibl.org**
- **Interactive map at www.ifoam-eu.org**

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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

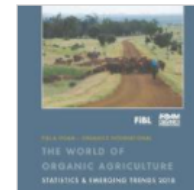
Contact

✉ [Helga Willer](mailto:Helga.Willer@fibl.org), FiBL, Frick, Switzerland

Link

> BIOFACH.de: www.biofach.de: www.biofach.de/en/organic-agriculture-at-biofach-2018

The World of Organic Agriculture 2018



[The World of Organic Agriculture 2018](http://www.organic-world.net)

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World

Data on organic agriculture world-wide

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