

The Organic Market in Europe 2011 – Nine Percent Increase Compared with 2010

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Data compiled by the Research Institute of Organic Agriculture (FiBL) and the Agricultural Market Information Company (AMI) show that the organic market in Europe increased by nine percent in 2011 and it is now at 21.5 billion euros. The Dutch and the Danes spent more than ten percent more for organic food than in 2010 and Germany, the largest market, had a growth rate of nine percent.

Germany showed retail sales of 6.59 billion euros. France held second place with 3.76 billion euros, this market has shown a very dynamic growth in the past couple of years. In contrast, retail sales continued to fall in Ireland and decreased for the third consecutive year in the United Kingdom (1.88 billion euros). Italy's organic market was estimated at 1.72 billion euros, and we expect it to supersede the United Kingdom in 2012.

As in the past years, the highest market shares were reached in Denmark, Austria, and Switzerland. The highest per capita consumption of organic food in 2011 was in Switzerland (177 euros), Denmark (162 euros), Luxembourg (134 euros) Austria (127 euros), Sweden (94 euros) and Germany (84 euros). The average per capita consumption for all 39 countries for which data were available was 27 euros.

The European Union, with 9 percent growth and a market size of 19.7 billion euros is the second largest market in the world after the United States, which showed a market growth of 9.4 percent in 2011 to a market size of 21 billion euros. The comparison of the whole of Europe (21.5 billion euros) and North America (22.9 billion euros) shows that North America has the lead.

It is interesting to note, that in the United States half of the turnover is made with fresh fruit and vegetables, but animal products are increasing in importance. Fruit and vegetables were also the pioneer organic products in Europe. They now have market shares between one third and one fifth of many national markets. Animal products, especially milk and dairy products but also eggs, are achieving higher market shares in Europe than in the USA. Also dry products and bread have a higher importance in many European countries. More details on the importance of products and of product groups in the individual European markets have been compiled within the framework of a European research project (OrganicDataNetwork) and the results of the detailed analysis are expected to be published in the European spring 2013.⁵

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⁵ For information about the OrganicDataNetwork project see www.organicdatanetwork.net.

In 2012 many European countries experienced further dynamic growth, and growth rates were similar to those in 2011 (final figures are expected to be available in the first months of 2013). A preliminary analysis suggests that it is likely that the retail sales in France amounted to more than 4 billion euros in 2012, and an increase of six percent was noted in the first six months of the year in the Netherlands and Italy.

Consumer interest in organic products remains high in most major markets, even though organic products have to compete more and more with other sustainability and regional labels. In spite of the difficult economic climate in some European countries, in which market shares are still low, consumer concern about the way food is produced is increasing.

Graphs

Europe: The ten countries with the largest markets for organic food and beverages 2011

Source: FiBL-AMI Survey 2013

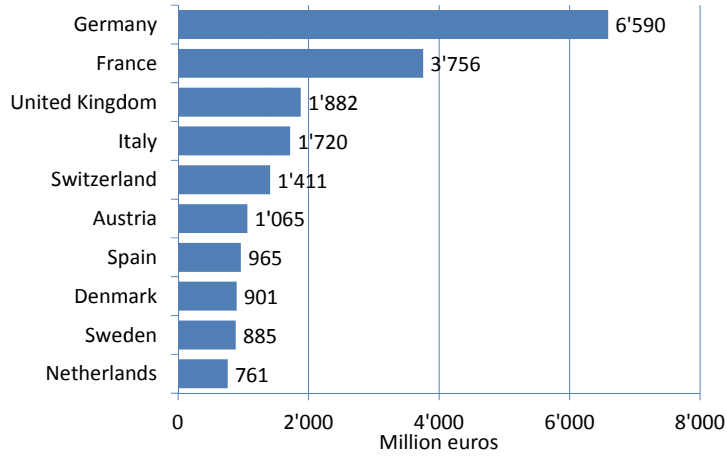


Figure 83: Europe: The ten countries with the largest markets for organic food and beverages 2011

FiBL-AMI Survey 2013; data collected in the framework of the OrganicDataNetwork EU FP7 project. For data sources see annex, page 322.

Europe: Distribution of organic food sales 2011 (total sales: 21.5 billion euros)

Source: FiBL-AMI Survey 2013

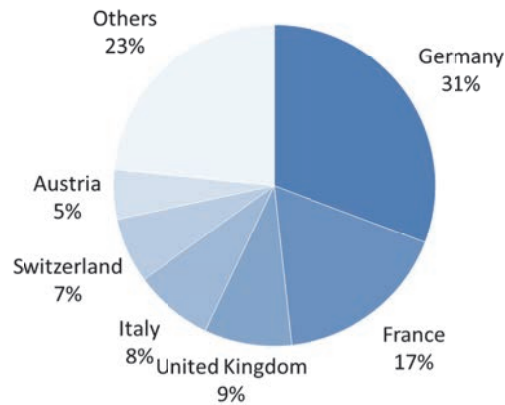


Figure 84: Europe: Distribution of organic food sales 2011

FiBL-AMI Survey 2013; data collected in the framework of the OrganicDataNetwork EU FP7 project. For data sources see annex, page 322

Europe: The ten countries with the highest per-capita consumption 2011

Source: FiBL-AMI Survey 2013

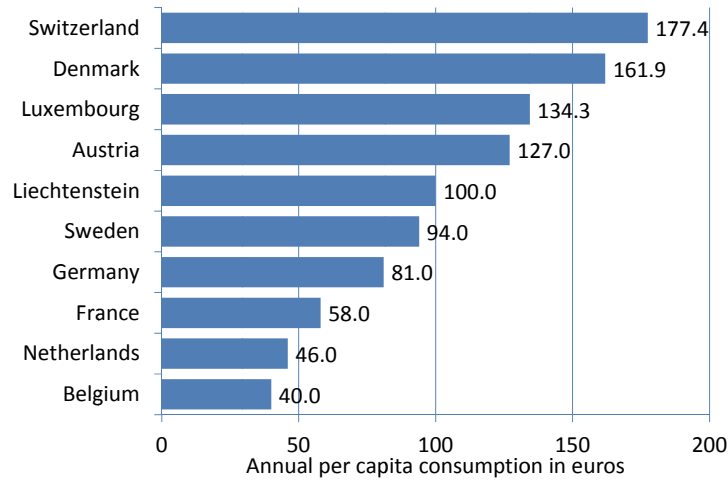


Figure 85: Europe: The ten countries with the highest per-capita consumption 2011
 FiBL-AMI Survey 2013; data collected in the framework of the OrganicDataNetwork EU FP7 project.
 For data sources see annex, page 322

Europe and European Union: Market development 2004-2011

Source: FiBL-AMI Surveys 2006-2013

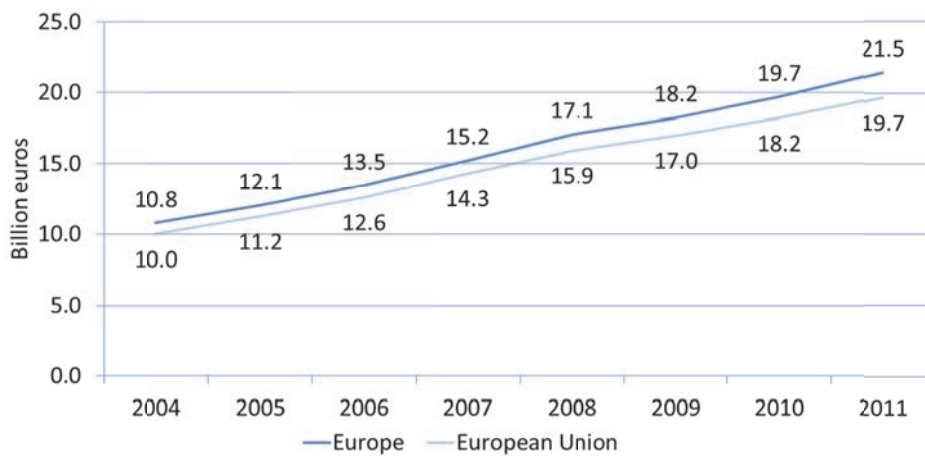


Figure 86: Europe and European Union: Market development 2004-2011

Source: FiBL-AMI Surveys 2006-2013. For data sources see annex, page 322.

Table: The European market for organic food

Table 54: Europe: The market for organic food 2011

Country	Data year	Retail sales [Mio €]	Euros/person	Retail sales: Growth 2011 [%]	Share of all sales [%]
Austria	2011	1'065	127	8.0	
Belgium	2011	435	40	3.3	
Bosnia and Herzegovina	2010	1	0		
Bulgaria	2010	7	1		
Croatia	2011	83	19	20.3	
Cyprus	2006	2	2		
Czech Republic	2010	59	7		0.6
Denmark	2011	901	162	13.0	7.8
Estonia	2009	12	9		1.0
Finland	2011	120	22	50.0	1.7
France	2011	3'756	58	11.0	2.3
Germany	2011	6'590	81	9.0	3.8
Greece	2006	58	5		
Hungary	2009	25	3		0.3
Ireland	2011	99	22	-4.4	
Italy	2011	1'720	28	11.0	
Latvia	2011	4	2		
Liechtenstein	2009	3.4			
Lithuania	2011	6	2		
Luxembourg	2011	68	134	5.0	
Moldova	2011				
Montenegro	2010	0.1	0		
Netherlands	2011	761	46	15.9	2.0
Norway	2011	160	33	9.5	
Poland	2011	120	3		0.2
Portugal	2011	21	2		
Romania	2011	80	4		
Russian Federation	2009	65	0		
Serbia	2010	40	5		
Slovakia	2010	4	1		
Slovenia	2010	38	19		
Spain	2011	965	21		1.0
Sweden	2011	885	94	3.6	4.1
Switzerland	2011	1'411	177	4.2	6.0
Turkey	2009	4	0		
Ukraine	2011	5.1	0.1		
United Kingdom	2011	1'882	30	-3.7	

FiBL-AMI Survey 2013; data collected in the framework of the OrganicDataNetwork EU FP7 project. For data sources see annex, page 322

Note on table

- › Blank cells: no information available
- › Where no published data exists, best estimates from a range of experts have been used, but these were not available for all cases, so sometimes earlier estimates are shown.
- › Values published in national currencies were converted to Euros using the 2011 average exchange rates.
- › Please note that due to fluctuating exchange rates it is not possible to make a year-to-year comparison for countries that do not have the Euro as their currency.
- › For details on data sources please see annex.
- › Corrections, revisions and updates should be sent to helga.willer@fibl.org
- › Corrections and revisions will be posted at www.organic-world.net