The Organic Market in Europe 2012[1]

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In 2012, the organic market continued to grow in the European Union, even though some countries were still affected by the economic crisis, leading to stagnation or even decline. According to data provided by the EU-funded project OrganicDataNetwork (www.organicdatanetwork.net), the organic market in Europe increased by approximately 6 percent in 2012. It now amounts to approximately 22.8 billion euros (European Union: 20.9 billion euros). Germany, the largest market, had a growth rate of 6 percent. Some countries like Denmark, Ireland, and Sweden showed stagnation; others showed strong growth, such as Finland (+24 percent), Norway (+17 percent), the Netherlands (+14 percent). In contrast, retail sales decreased for the fourth consecutive year in the UK (-1.5 %), but a return to growth was noted in 2013. In Greece, the market declined substantially in 2013 due to the economic crisis; however, data is not available.

Germany, the largest market in Europe, had retail sales of 7.04 billion euros, and France held second place with 4.0 billion euros– a market that has shown very dynamic growth in the past couple of years. The UK was in third place (1.95 billion euros), followed by Italy (1.89 billion euros) (Figure 62). As in recent years, the highest market shares were reached in Denmark (7.6 percent), Austria (6.5 percent), and Switzerland (6.3 percent) (Figure 65). The highest per capita consumption of organic food in 2012 was in Switzerland (189 euros), Denmark (159 euros), and Luxembourg (143 euros). However, care must be taken in interpreting these figures as the costs of living differ quite considerably between countries (Table 51).

In 2013, in many European countries the market experienced further significant growth, and growth rates were similar to those in 2012 (final figures are expected to be available by mid of 2014). Consumer interest in organic products remains high, even though they increasingly have to compete with other sustainability and regional labels. In spite of the difficult economic climate in some European countries where market shares are still low, consumer concern about the way food is produced is increasing. The European Union (20.9 billion euros) is the second largest single organic market in the world after the United States (22.6 billion euros). A comparison of the 2012 data for the whole of Europe (22.8 billion euros in 2012) and North America (24.1 billion euros in 2012) shows that North America has the lead (see also chapter on global organic statistics page 34).

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Within the overall organic market in Europe, certain organic products are more dominant than others. A 2013 survey carried out as part of the OrganicDataNetwork (Willer and Schaack, 2013) produced the following results:

Fruit and vegetables are the pioneering organic products in Europe. They now have shares of between one third and one fifth of many national organic markets. They are especially strong in Italy, Ireland, Norway, Sweden, and Germany. All over Europe, the organic market is dominated by fresh products compared to the conventional markets.

In many countries and in Northern Europe in particular, animal products, especially milk and dairy products, make up a high share of all organic products sold. Meat and meat products are very successful, with market shares of around 10 percent in Belgium, the Netherlands, Finland, and France. On the other hand, in many countries, the meat and meat-based product market is not yet well developed, due to lack of manufacturing capacities and high price premiums compared to conventional products.

Beverages – mainly wine – constitute an important part of the organic markets – nearly 15 percent in France and Croatia. Hot beverages (e.g. coffee, tea, and cocoa) make up 3 to 5 percent of the organic market. Milled cereal products, which are easily sold and stored in the supermarkets, achieve high shares in the Czech Republic, Finland and Norway. Bread and bakery products are very important in the organic product range, with around 10 % of the market, in Switzerland, the Netherlands, France, Sweden, Finland, and Germany.

When comparing the market shares of organic products within the total market one of the success stories in many European countries are eggs. According to the OrganicDataNetwork survey, organic eggs have market shares of up to 20 percent in Switzerland, and around 10 percent in most of the countries for which data was available. Sales of eggs reflect the high concerns of consumers with regards to animal welfare and also their readiness to pay relatively high price premiums. In Germany, for example, organic eggs are at least double the price of conventional eggs – one of the highest price differentials to be found within organic product groups.

- After eggs, vegetables enjoy the highest market shares (in value), with organic accounting for 8 to 12 percent of all vegetables sold in Switzerland, Austria and Germany.
- In many countries, organic dairy products achieve market shares of about 5 percent of all dairy products sold. In Switzerland, the figure is even 10 percent.
- Single products, such as organic baby food and meat substitutes, often achieve high shares of the total market in many European countries. Fresh carrots have a 30 percent market share in Germany.
- On the other hand, products like beverages and meat (especially poultry) generally have low market shares due to high price premiums compared to conventional products (Willer and Schaack, 2013).

References

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Graphs

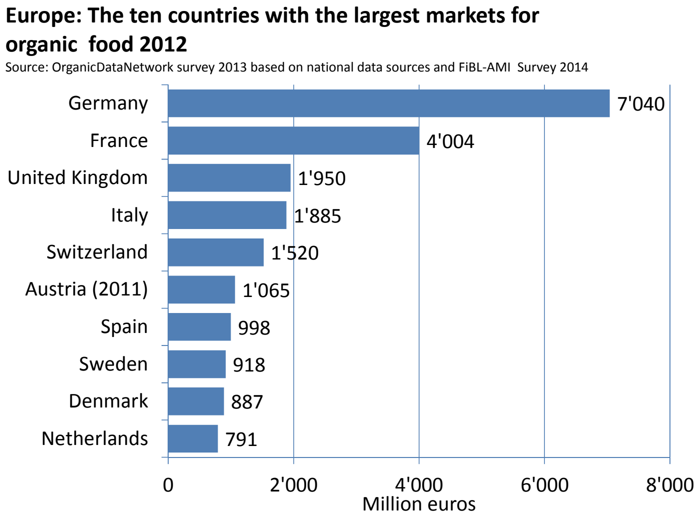

Figure 62: Europe: The ten countries with the largest markets for organic food and beverages 2012 (excluding catering)

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2014 For data sources see annex, page 286

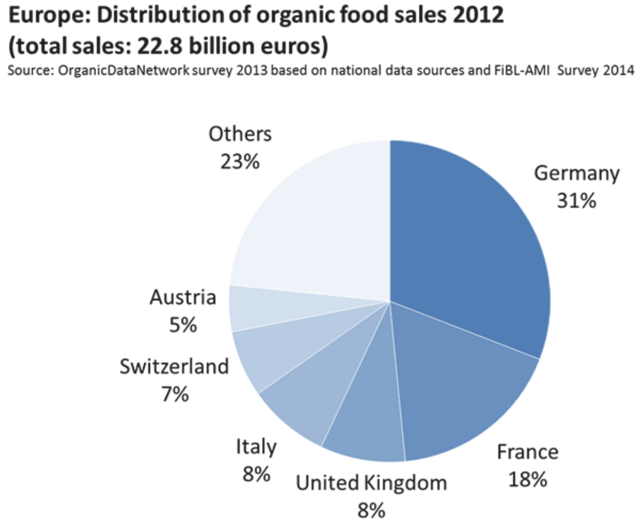

Figure 63: Europe: Distribution of organic food sales 2012

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2006-2014. For data sources see annex, page 286

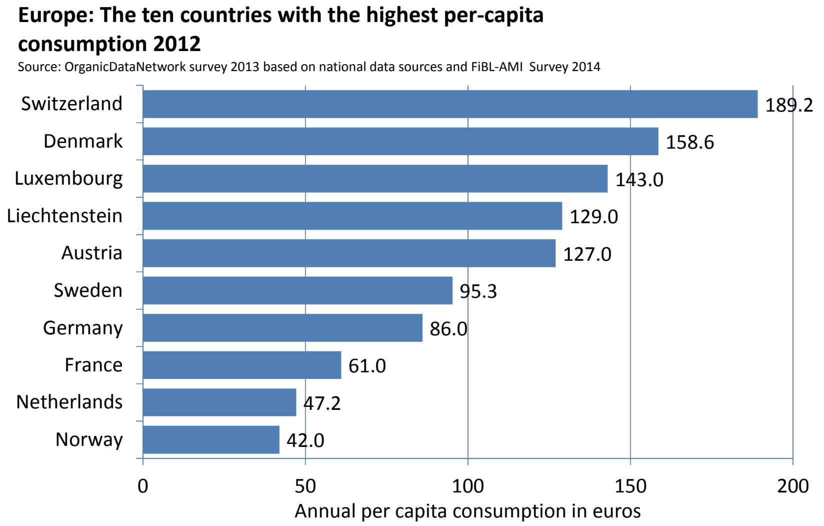

Figure 64: Europe: The ten countries with the highest per-capita consumption 2012 (excluding catering)

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2014. For data sources see annex, page 286

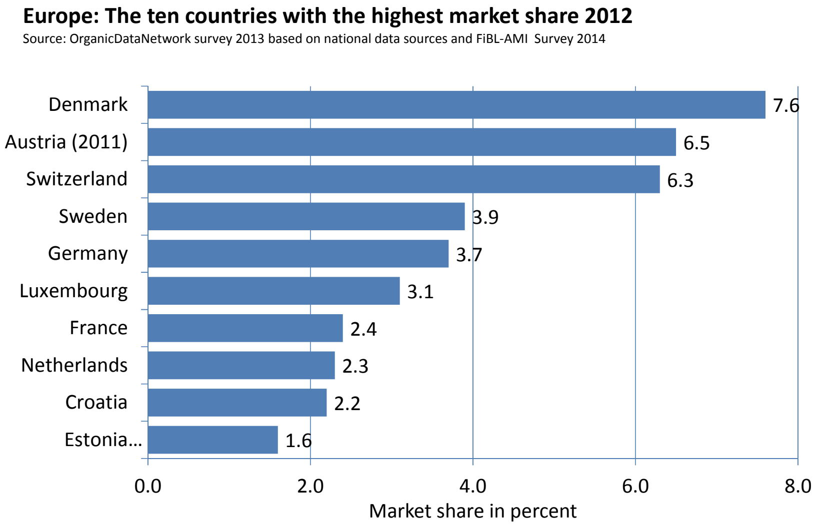

Figure 65: Europe: The ten countries with the highest organic market shares 2012 (excluding catering)

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2014. For data sources see annex, page 286

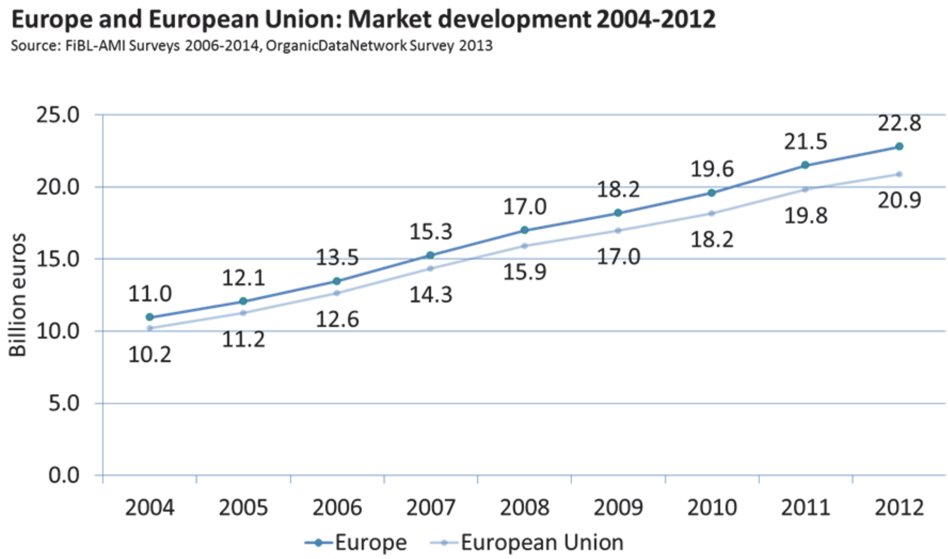

Figure 66: Europe and European Union: Market development 2004-2012

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI surveys 2006-2014. For data sources see annex, page 286.

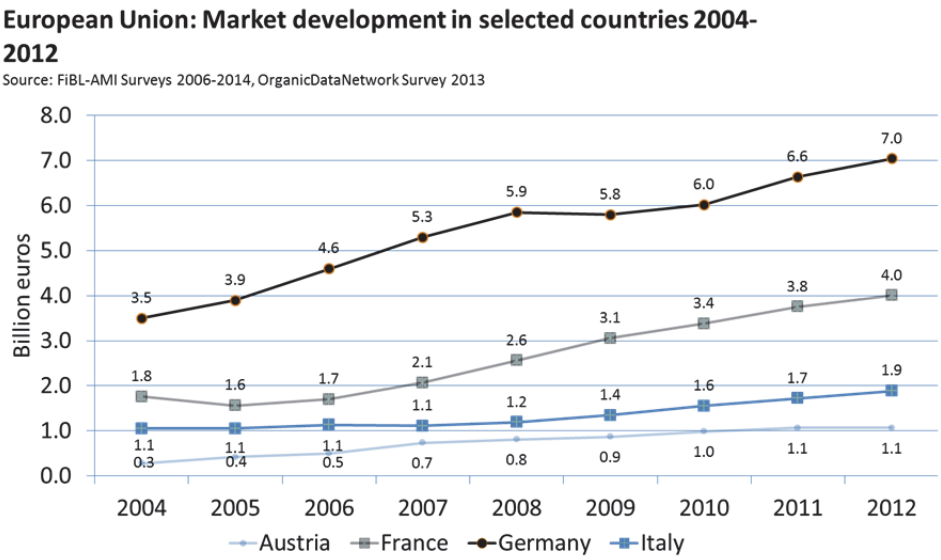

Figure 67: European Union: Market development in selected countries 2004-2012

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI surveys 2006-2014. For data sources see annex, page 286.

Table: The European market for organic food

Table 51: Europe: The market for organic food 2012

Country	Retail sales [Mio €]	Catering [Mio €]	Retail sales: Change 2011/2012 [%]	€/person	Share of all retail sales [%]
Austria (2011)	1'065	64		127	6.5
Belgium	417		6.5 %	38	1.5
Bosnia and Herzegovina (2010)	1			0	
Bulgaria (2010)	7			1	
Croatia	104		0.7 %	25	2.2
Cyprus (2006)	2			2	
Czech Republic (2011)	66			6	0.7
Denmark	887	109	0.7 %	159	7.6
Estonia (2011)	20			15	1.6
Finland	202		24 %	37	1.6
France	4'004	169	6.6 %	61	2.4
Germany	7'040			86	3.7
Greece (2010)	60			5	0.4
Hungary (2009)	25	0		2	0.3
Ireland (2011)	99			22	0.7
Italy	1'885	290	9.6 %	31	1.5
Latvia (2011)	4			2	0.2
Liechtenstein	5			129	
Lithuania (2011)	6			2	0.2
Luxembourg	75		5-10 %	143	3.1
Montenegro (2010)	0			0	
Netherlands	791	143	14 %	47	2.3
Norway	209	11 (2011)	17%	42	1.2
Poland (2011)	120			3	0.2
Portugal (2011)	21			2	0.2
Romania (2011)	80			4	0.7
Russian Federation	120			1	
Serbia (2010)	40			5	
Slovakia (2010)	4			1	0.2
Slovenia	44	0		22	1.5
Spain	998			21	1.0
Sweden	905		-4 %[1]	95	3.9
Switzerland	1'520		5.3 %	189	6.3
Turkey (2009)	4			0	

[1] The figure on the development of the organic market in Sweden is from Statistics Sweden. According to Ekoweb, the market grew by 3 percent in 2012.

Country	Retail sales [Mio €]	Catering [Mio €]	Retail sales: Change 2011/2012 [%]	€/person	Share of all retail sales [%]
Ukraine	5			0	
United Kingdom	1'950	20	-1.5 %	32	
Europe	22'795		6 %	35	
European Union	20'893		5.4 %	41	

Source: OrganicDataNetwork survey based on national data sources and FiBL-AMI survey 2014. For details on data sources see annex, page 286

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 2012 average exchange rates according to the Central European bank. .
- 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

Sources for retail sales value

Austria: Organic Retailers Association; Belgium: Bioforum, VLAM and GfK; Bosnia and Herzegovina: Ecozept; Bulgaria: Bioselena; Croatia: Darko Znaor, private consultant; Cyprus: Ecozept; Czech Republic: UZEI; Denmark: Danish Agriculture & Food Council/Organic Denmark/Statistics Denmark; Estonia: Centre of Ecological Engineering; Finland: Pro Luomo; France: Agence Bio; Germany: AMI; Greece: N. van der Smissen; Hungary: Biokorsar Survey; Ireland: Bord Bia; Italy: AssoBio; Latvia: Ekoconnect; Liechtenstein: KBA; Lithuania: Ekoconnect; Luxembourg: Biogros estimate; IBLA; Montenegro: Ecozept; Netherlands: Bionext, Bio-Monitor; Norway: Norwegian Agricultural Authority SLF; Poland: IFOAM EU estimate; Portugal: Interbio; Romania: BCG-Global Advisors; Russian Federation: Eco-Control; Serbia: Ecozept; Slovakia: Ecozept; Slovenia: ISD; Spain: MAGRAMA; Sweden: SCB; Switzerland: BIO SUISSE; Turkey: MARA; Ukraine: Organic Federation of Ukraine; United Kingdom: Soil Association