ORGANIC IN EUROPE

PROSPECTS AND DEVELOPMENTS

IFOAM EU GROUP
10 YEARS
MAKING EUROPE MORE ORGANIC

FiBL

CIHEAM
MAI BARI

EDITOR AND PUBLISHER:

IFOAM EU GROUP
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IFOAM EU Group
Rue du Commerce 124, BE - 1000 Brussels, Belgium
Phone: +32 2280 1223 - Fax: +32 2735 7381
info@ifoam-eu.org
www.ifoam-eu.org

EDITORS: Stephen Meredith and Helga Willer
PRODUCTION SUPPORT: Laura Ullmann, Ann-Kathrin Trappenberg, Laura Maeso and Kathleen Delage
COUNTRY REPORT AND STATISTICAL DATA COLLECTION, DRAFTING AND EDITING: FiBL Projekte GmbH
LANGUAGE EDITING: Alastair Penny

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PARTNERS:

FiBL

CIHEAM
MAI BARI

SUPPORTERS:

ecovalia
Asociación Valor Ecológico

Green Organics

TRADIN Organic
Global Organic Ingredients

MAVA
FONDATION POUR LA NATURE

[redacted]

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GERMANY

Diana Schaack[29] and Helga Willer[30]

KEY INDICATORS 2012[31]

Area	Organic agricultural area	1 034 355 hectares
	Share of total agricultural area	6.2 %
	Change 2002 to 2012	+48 %
	Change 2011 to 2012	+1.8 %
Operators	Organic producers	23 032
	Organic processors	8 293
	Organic importers	309
	Organic exporters	No data
Market and trade	Retail sales	EUR 7.04 billion
	Share of total market	3.7 %
	Per capita consumption	EUR 86
	Change in retail sales 2011 to 2012	+6.3 %
	Organic exports	No data
	Organic imports	No data

HIGHLIGHTS FOR 2013

- The organic agriculture trainee programme celebrates its 10th anniversary
- 12th scientific conference held in March 2013
- Organic retail sales exceed EUR 7 billion

HISTORY OF ORGANIC FARMING

- 1924: Rudolf Steiner gives eight talks on the spiritual foundation of agriculture, later called bio-dynamic agriculture, at the Koberwitz estate near Breslau in Silesia (today Wroclaw in Poland)
- 1950s: Hans Müller of Switzerland develops the organic-biological farming method, the theoretical basis of which is provided by the German medical doctor and microbiologist Hans-Peter Rusch
- 1961: Foundation Ecology & Agriculture is established
- 1971: Bioland is founded, Germany's largest organic producer organisation
- 1988: The working group on organic agriculture (AGÖL) is founded as an umbrella organisation; AGÖL ceased its activities in 2002
- 1989: Support for organic farmers through the so-called extensification programme
- 1991: First scientific conference of the German-speaking countries takes place
- 2002: Federal organic farming scheme is launched
- 2002: German Federation of the Organic Food Industry (BÖLW) is founded

KEY SECTOR INSTITUTIONS

- Association of Organic Processors, Wholesalers and Retailers (BNN): www.n-bnn.de
- Federation of the Organic Food Industry (BÖLW) and its member associations: www.boelw.de
- Foundation Ecology & Agriculture (SÖL): www.soel.de
- Research Institute of Organic Agriculture Germany (FiBL): www.fibl.org

PRODUCTION BASE: LAND USE AND KEY CROPS

Of the 1 034 355 hectares of organic agricultural land, 55.8 % consists of permanent grassland and grazing areas, 41.57 % is arable land, and 1.6 % is used for permanent crops. The key arable crops are cereals (202 000 hectares), followed by green fodder from arable land (153 000 hectares), and protein crops (22 200 hectares). The key permanent crops are grapes (7 400 hectares), temperate fruit (6 800 hectares), and berries 1 546 hectares).

MARKET

The share of organic food sales in the total turnover for food products in Germany increased from EUR 1.48 billion in 1997 to approximately EUR 7.04 billion in 2012 (excluding restaurants and catering). This accounted for 3.7 % of the food market. Experts believe that organic farming still has considerable growth potential.

Top-selling products: Vegetables, including potatoes (EUR 561.7 million, 8.2 % of the total market); bread and bakery products (EUR 459.3 million, 5.9 % of the total market);and fruit (EUR 389.2, 6.5 % of the total arket).[32]

Market channels: Approximately 50 % of organic products are sold through general retailers, 31.4 % through organic retailers and 18.5 % through other channels.

Exports and imports: Germany is not only the largest market for organic products in Europe, but also one of its largest organic producers. However in 2009/10 organic imports accounted for between 2 % and 95 % – depending on the product – all of which could have been produced domestically.

STANDARDS, LEGISLATION, ORGANIC LOGO

The Organic Farming Act (ÖLG) pools specific executive functions in German organic farming, and has stricter requirements than EU legislation on organic farming. The Organic Farming Act was promulgated in the Federal Law Gazette on 15 July 2002.

Germany has its own organic logo, the *Biosiegel,* www.biosiegel.de.

POLICY SUPPORT

National action plan: In 2002, the Federal Organic Farming Scheme was set up to improve research and the general conditions for organic farming. The scheme was extended to include other forms of sustainable agriculture under a resolution adopted by the German Parliament on 26 November 2010. EUR 34.8 million were made available for the scheme in 2002, approximately EUR 36 million in 2003, EUR 20 million annually from 2004 to 2006, and EUR 16 million from 2007 to 2012. In 2013, EUR 17 million was made available. The programme's financial resources are to be maintained at this level in the medium term. However, since 2011 the scheme has been also open to other forms of sustainable agriculture.

Support under EU rural development programmes: Germany has used public funds to promote the introduction of organic farming since 1989. Since 1994, the federal states have carried out agri-environmental programmes to support the introduction and maintenance of organic farming.

RESEARCH & ADVICE

In 1981, the first chair in organic agriculture worldwide was established at the University of Kassel-Witzenhausen. Research also takes place at other universities, at state research stations and in private research institutes. A state research institute for organic agriculture was established in December 2000 in Trenthorst in Schleswig-Holstein, under the auspices of the *Johann Heinrich von Thünen Institute*, the federal agricultural research station. Every two years, a scientific conference takes place in the German-speaking countries, www.wissenschaftstagung.de, organised by a different university institute in cooperation with the Foundation Ecology & Agriculture (SÖL), the initiator of the conference in 1991.

There are several forms of organic advisory services: those provided by the producer associations and chambers of agriculture; the partly state-funded *Ringberatung*, in which a number of producers collectively hire an advisor; and the official advisory service. Training is available for advisors as part of the Federal Scheme for Organic Farming and Other Forms of Sustainable Agriculture.

CHALLENGES & OUTLOOK

One of the main challenges is the failure of supply to keep up with the continually growing demand for organic food. A large proportion of the organic products consumed are imported, although they could also be produced in the country.

FURTHER INFORMATION

- Organic Eprints for Germany: www.orgprints.org/view/projects/de.html
- Ministry of Agriculture, Food and Consumer Protection, organic farming pages: www.bmelv.de/SharedDocs/Standardartikel/EN/Agriculture/OrganicFarming/OrganicFarmingInGermany.html
- Office of the Federal Organic Farming Scheme and other Forms of Sustainable Agriculture: www.bundesprogramm-oekolandbau.de
- German information portal on organic agriculture: www.oekolandbau.de
- Organic market-related information: www.organic-market.info and www.bio-markt.info
- Agricultural Market Information (AMI) company: www.ami-informiert.com

For other relevant websites, see the section on key sector institutions and research & advice.