Organic Farming and Market Development in Europe

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This article gives an overview of results of the market data collected in the OrganicDataNetwork project, which was funded by the European Union (EU) under its 7th framework programme for research, demonstration and technological development and ended in 2014.[3] Under this project, for the first time, detailed organic market data for all European countries was collected[4] and stored in one single database, which is available online.[5] In order to present these data, the statistical report for Europe is more comprehensive than for the other continents.

Key data for the organic sector 2013

Organic agricultural land is now at 11.5 million hectares in Europe, constituting 2.4 percent of the continent's agricultural land. In the European Union, 10.2 million hectares of farmland were organic, with a share of 5.7 percent of its agricultural land being organic in 2013. In eight European countries (European Union: six countries), ten percent or more of the agricultural land is organic. Growth of organic agricultural land has been substantial in Europe and in the European Union over the last decade, where the organic area has almost doubled since 2004, when most of the new member states (EU-13)[6] became part of the European Union. In the new member states after their accession to the EU, organic farming became, due to policy support and access to major markets, an attractive option. Land use data show that organic agriculture produces a wide range of products according to the demand of the markets. Organic production in the EU-13, the EU candidate and potential candidate countries (CPC),[7] and other European countries has filled many gaps for the EU-15[8] countries, where production volumes of raw materials are insufficient.

Producer numbers have also grown significantly (almost 260'000 in the European Union; and more than 330'000 in Europe), and since 2004, growth rates in the new Member States have been considerably higher than in the EU-15. A large proportion of processors and importers are located in the EU-15 and Switzerland, showing that the new member states and further European countries still need to develop their processing capacities in order to become less dependent on organic imports and increase the value of their own export products.

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[3] The project "Data network for better European organic market information" (OrganicDataNetwork) has received funding from the European Union's Seventh Framework Programme for Research, Technological Development and Demonstration under grant agreement no 289376.

[4] The data was collected by the Research Institute of Organic Agriculture (FiBL), Switzerland and the Agricultural Market Information Company (AMI), Germany, among the partners of the OrganicDataNetwork. In addition, further data sources were used.

[5] This database is available at http://www.organicdatanetwork.net/odn-statistics.html

[6] EU-13 refers to the 13 member states that became members of the EU in or after 2004.

[7] CPC refers to EU Candidate Countries – Albania, Iceland, Montenegro, Serbia, Macedonia (FYROM) and Turkey - and Potential Candidates - Bosnia & Herzegovina and Kosovo - as categorised by the European Union. More information available at: www.europa.eu/about-eu/countries.

[8] EU-15 refers to the 15 member states that were members of the European Union before 2004.

With **retail sales** in 2013 valued at 22.2 billion euros, the European Union is the second largest single market for organic products in the world after the United States. The market showed a growth rate of approximately 6 percent. The European market for organic products was valued at approximately 24.3 billion euros (North America almost 27 billion euros). European countries have top rankings for market share and per capita consumption worldwide: three countries have an organic food market share of more than five percent, with individual products and product groups reaching even higher shares. Eggs, for instance, can constitute as much as 20 percent of all eggs sold. Baby food or meat substitutes reach organic shares of about 50 percent. Five countries had a per-capita consumption of more than 100 euros in 2013. Almost no data is available on **exports and imports**, but it may be assumed that, with the growing domestic markets, international trade activities will increase for both intra-EU trade as well as exports and imports to and from the European Union.

Looking at the European organic sector by country group, it becomes evident that in the **EU-15** both organic agricultural land and the organic market have shown constant growth in the past ten years. Production is diversified, and domestic demand can be met to a large degree, even though imports play an important role for many countries and not only for products that cannot be produced there, such as coffee or bananas, but also for domestic products such as cereals. Overall the market is well developed, with a full range of products available. In a global context, the EU and, in particular, the EU-15 countries are leaders in terms of share of the organic market as a proportion of total agriculture and the overall market. The per capita consumption of organic products is also higher in the European Union than in other parts of the world. Much of the market's development has been driven by strong consumer interest, a well-developed organic sector with strong institutions, state support and Organic Action Plans.

After their accession to the European Union, many of the **EU-13** countries saw their organic production increase very quickly, driven by support from the European Union's rural development programmes. Even though the share of organic land is high, production, market shares, and per capita consumption remain low in some countries. The inadequate development of processing facilities means that local demand for processed products often cannot be met, and many processed products are imported. However, recent high growth rates in countries like Croatia, Poland, and Slovenia show that the market is developing rapidly.

Similarly to the EU-13, some **EU candidates and potential candidates (CPC)** have experienced rapid growth in organic agricultural land over the past couple of years. However, domestic and export-led market development as well as processing have not kept pace. In these countries, wild collection plays an important role (fruit and mushrooms). Since 2004, in the **EFTA** countries,[1] the development of organic land has not been as fast as in the other country groups. Nevertheless, Switzerland and Liechtenstein have very high shares of organic agricultural land, strong organic sectors, a good consumer base and state support, making the sector a well-established part of society. In the remaining European countries, particularly strong growth was recently noted in Ukraine.

[1] EFTA is the European Free Trade Association. Its members are: Iceland, Liechtenstein, Norway, and Switzerland.

Table 49: Europe: Key indicators by country and country group 2013

	Country	Area [ha]	Area share [%]	Producers	Retail sales [Mio €]	Market share [%]	€/person
EU [EU15]	Austria	526'689	19.5%	21'810	1'065	6.5%	127
	Belgium	62'529	4.6%	1'487	403	1.6%	36
	Denmark	169'298	6.4%	2'589	917	8.0%	163
	Finland	206'170	9.0%	4'284	215	1.6%	
	France	1'060'756	3.9%	25'467	4'380	2.6%	
	Germany	1'060'669	6.4%	23'271	7'550	3.7%	93
	Greece	383'606	4.6%	23'433	60	0.4%	5
	Ireland	52'793	1.3%	1'263	99	0.7%	22
	Italy	1'317'177	10.3%	45'969	2'020	2.0%	31
	Luxembourg	4'448	3.4%	212	84	3.2%	157
	Netherlands	49'394	2.6%	1'646	840	2.4%	
	Portugal	271'532	8.1%	3'308	21	0.2%	2
	Spain	1'610'129	6.5%	30'502	998	1.0%	21
	Sweden	500'996	16.3%	5'584	1'018	4.3%	106
	United Kingdom	567'751	3.3%	3'918	2'065		33
EU [EU15] total		*7'843'937*	*6.1%*	*194'743*	*21'735*		
EU [EU13]	Bulgaria	56'287	1.8%	3'854	7		1
	Croatia	40'641	3.1%	1'608	104	2.2%	25
	Cyprus	3'923	2.7%	719	2		2
	Czech Republic	474'231	11.2%	3'910	70	0.7%	7
	Estonia	151'256	16.0%	1'553	22	1.6%	17
	Hungary	140'292	3.3%	1'673	25	0.3%	2
	Latvia	200'433	11.0%	3'473	4	0.2%	2
	Lithuania	166'330	5.7%	2'555	6	0.2%	2
	Malta	37	0.4%	12			
	Poland	661'956	4.3%	25'944	120	0.2%	3
	Romania	288'261	2.1%	15'315	80	0.7%	4
	Slovakia	166'700	8.8%	365	4	0.2%	1
	Slovenia	38'665	8.4%	3'049	49	1.8%	24
EU [EU13] total		*2'389'010*	*4.7%*	*64'030*	*492*		
CPC	Albania	662	0.1%	46			
	Bosnia and Herzegovina	292	0.01%	24	0.3		
	Kosovo	114	0.03%	10			
	Macedonia (FYROM)	3'146	0.3%	382			
	Montenegro	3'068	0.6%	62	0.1		0.2
	Serbia	8'228	0.2%	1'281			
	Turkey	461'396	1.9%	65'042	4		0.1
CPC total		*476'906*	*1.4%*	*66'847*	*4*		
EFTA	Iceland	9'710	0.4%	33			
	Liechtenstein	1'137	31.0%	38	5		129
	Norway	51'662	4.8%	2'452	224	1.1 %	44
	Switzerland	128'140	12.2%	6'308	1'668	6.9%	210
EFTA total		*190'649*	*4.3%*	*8'831*	*1'897*		
other European countries	Andorra	1	0.01%				
	Channel Islands	260	3.0%				
	Faroe Islands	253	8.4%				
	Moldova	22'102	0.9%	172			
	Russian Federation	144'254	0.1%	70	120		1
	Ukraine	393'400	1.0%	175	12		0.3
other European countries total		*560'270*	*0.2%*	*419*	*132*		
Europe total		**11'460'773**	**2.4%**	**334'870**	**24'260**		**32.6**
European Union total		**10'232'947**	**5.7%**	**258'773**	**22'227**		**43.8**

Source: OrganicDataNetwork survey 2015 based on national data sources, FiBL-AMI survey 2015, based on Eurostat and national data sources
*CPC = EU candidate and potential candidate countries

Organic agricultural land by country and country group

In 2013, 11.5 million hectares were farmed organically in Europe and slightly more than 10.2 million hectares in the European Union.

The countries with the largest areas of organic land are Spain, Italy, France and Germany. Globally, 43 million hectares of farmland were organic in 2013, and approximately 27 percent of the world's organic farmland was in Europe. The four European countries mentioned above were among the ten countries with the largest organic areas globally.

Of the 11.5 million hectares of organic agricultural land in Europe, 7 million hectares were fully converted, and 1.9 million were under conversion. Not all countries provided data on their fully converted and in-conversion areas (e.g., Austria, Germany, Portugal and Switzerland).

Particularly in Italy, Spain, Turkey, and Poland (2012 data for Poland), large areas are under conversion, and therefore, a major increase in supply may be expected from them in the near future.

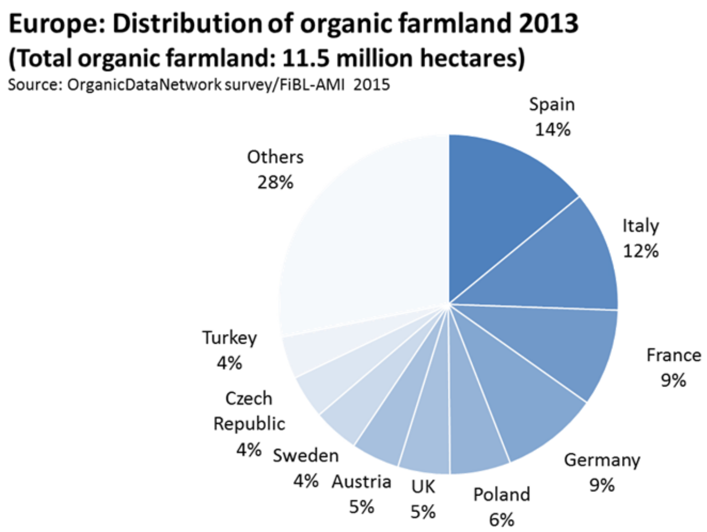


Figure 57: Distribution of organic farmland in Europe 2013 (11.5 million hectares)
Source: OrganicDataNetwork survey/FIBL-AMI based on national data sources and Eurostat

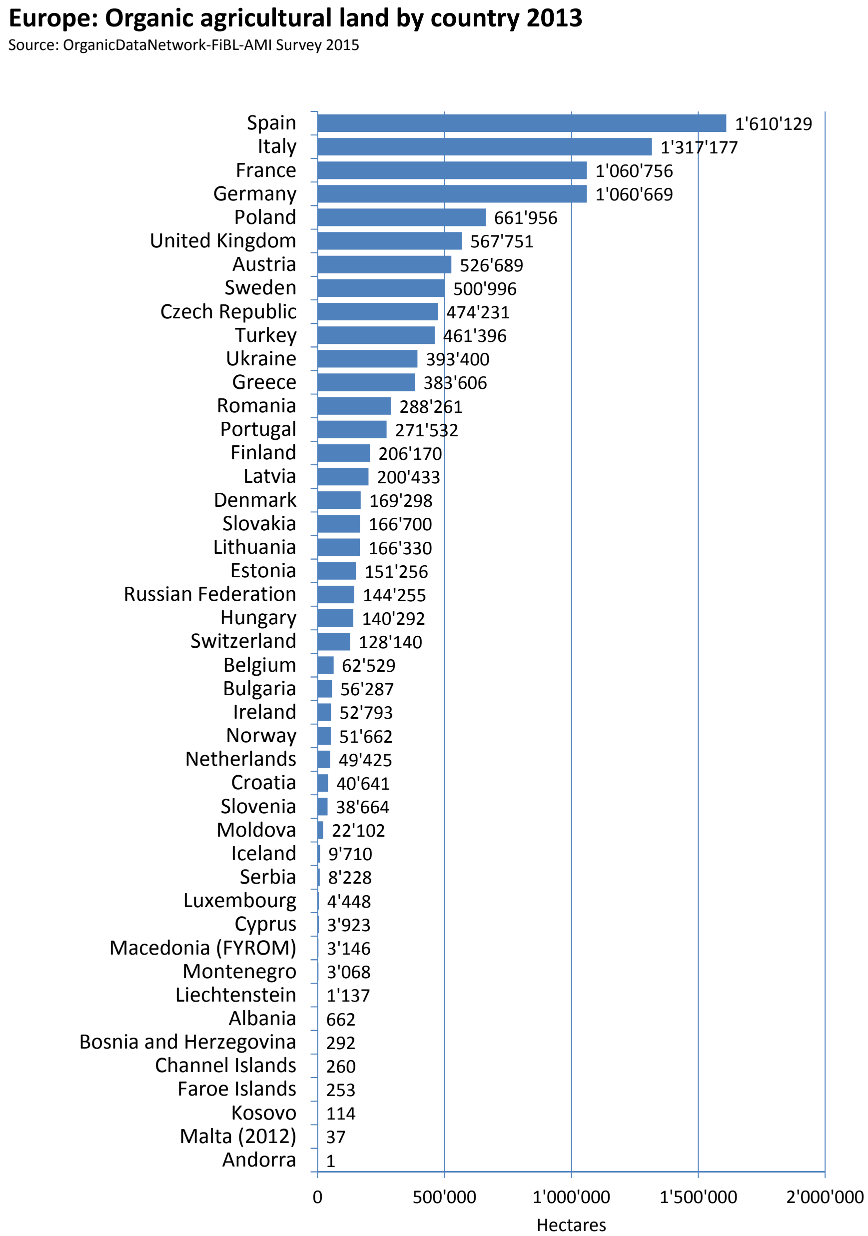


Figure 58: Europe: Organic agricultural land by country 2013
Source: OrganicDataNetwork-FiBL-AMI survey 2015 based on national data sources

Shares of organic agricultural land

In the European Union, 10.2 million hectares of organic farmland (in 2013) constituted 5.7 percent of the total agricultural land (Europe: 11.5 million; 2.4 percent) (see Table 49).

In eight countries, more than 10 percent of the agricultural land is organic. The countries with the highest shares are Liechtenstein, Austria, Sweden, and Estonia. One of the goals of the Austrian Organic Action Plan was to have 20 percent of all agricultural land be farmed organically, which was achieved in 2010.

The country with the highest share in Europe (and the second-highest in the world) was Liechtenstein (see Figure 60). In the EU-15,[1] 6.1 percent of the agricultural land was organic, thus representing a higher share than in the EU-13 (4.7 percent). In the new member states, Estonia, the Czech Republic, and Latvia have more than 10 percent organic land. Despite the high organic shares of the agricultural land, in some EU-13 countries, organic production remains low due to high shares of grassland and the lack of processing facilities. For EU candidates and potential candidates, shares of the total organic agricultural land are still low, whereas two EFTA countries, Switzerland (12.2 percent) and Liechtenstein (31 percent), have very high shares.

Globally, 1 percent of the agricultural land was organic in 2013. The country with the highest share was the Falkland Islands with 36 percent, followed by a number of European countries. In eleven countries, globally, more than 10 percent of the farmland was organic. However, 60 percent of the countries had less than 1 percent organic land. In Europe, this percentage was only 25 percent.

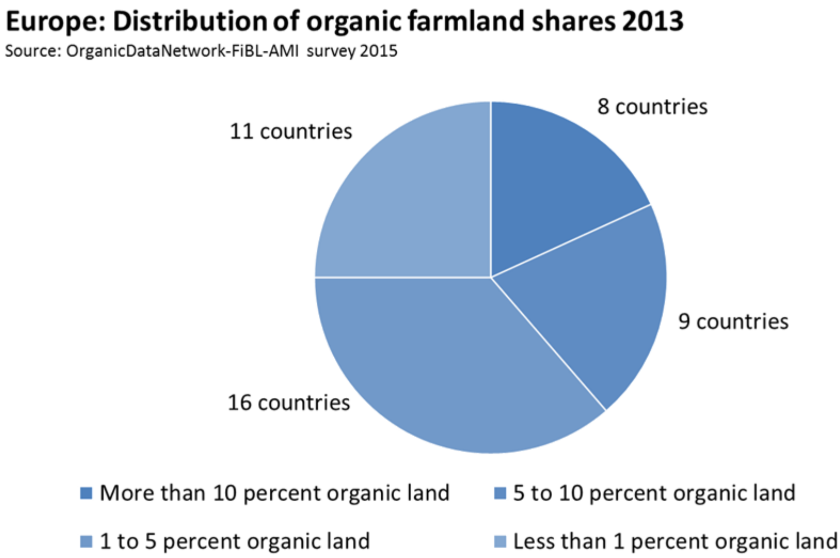


Figure 59: Europe: Distribution of the organic shares of all farm land 2013
OrganicDataNetwork-FiBL-AMI-IAMB survey 2015, based on Eurostat and national data sources

[1] EU-15 refers to the 15 member states that were members of the European Union before 2004.

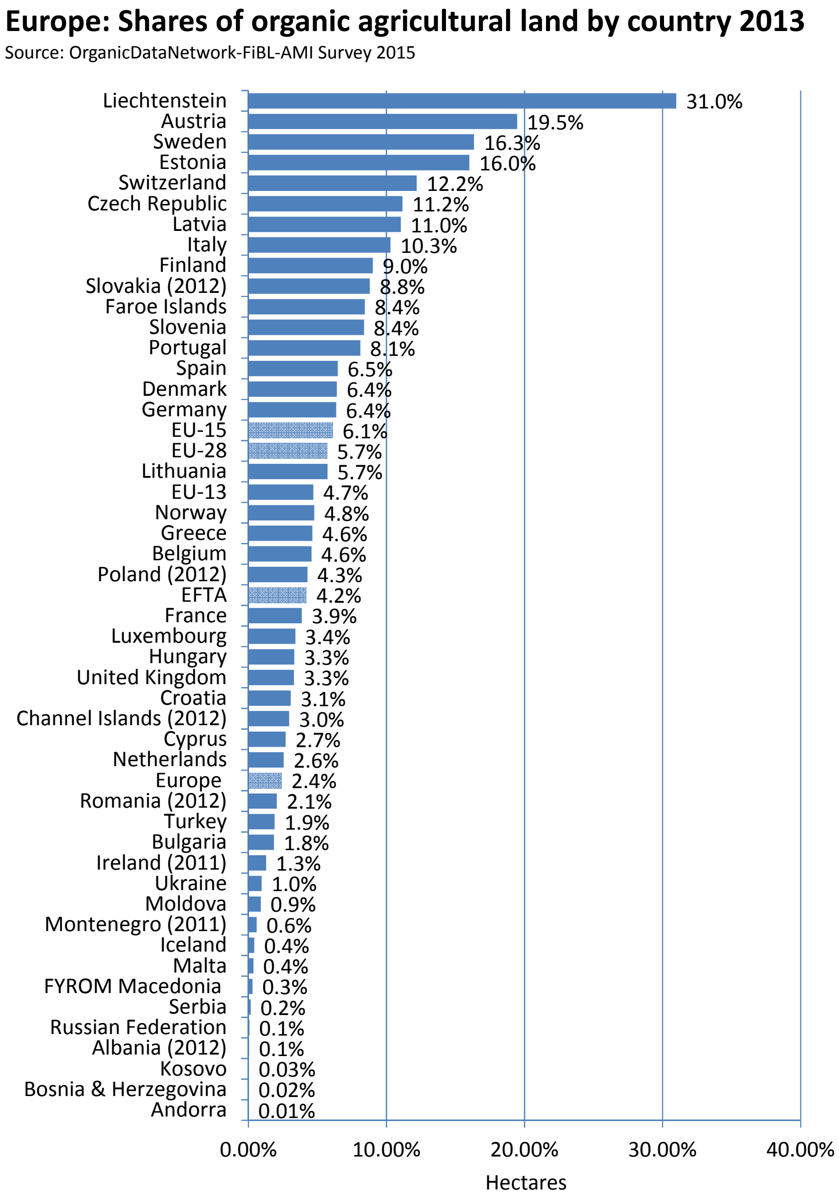


Figure 60: Europe: Shares of total organic agricultural land 2013

OrganicDataNetwork-FiBL-AMI survey 2015 based on national data sources and Eurostat

Growth of the organic land

In 2013, the organic agricultural land in Europe increased by 180'000 hectares (European Union: 155'000) or 3 percent. The country with the largest growth of organic land were Italy (+ 150'000 hectares), Ukraine (+120'000), and Portugal (+71'000). The highest relative increases were in Bulgaria and Ukraine (+44 percent each).

Since 2004, when 10 new member states joined the European Union, organic agricultural land has increased by 76 percent in the EU (Europe: 80 percent) – from 5.8 million hectares in 2004 to 10.2 million hectares in 2013. In the EU-15, growth was slower (+50 percent), whereas in the new member states, the area almost trebled. In many EU-15 countries, organic farmland had already grown before 2004 to a comparatively high level. For EU candidates and potential candidates, high growth (more than 400 percent) was noted. Most of the growth in the past years was in Turkey, whereas, in the EFTA countries, growth was modest.

Globally, since 2004, the organic farmland has increased by 40 percent, a slower growth than in Europe.

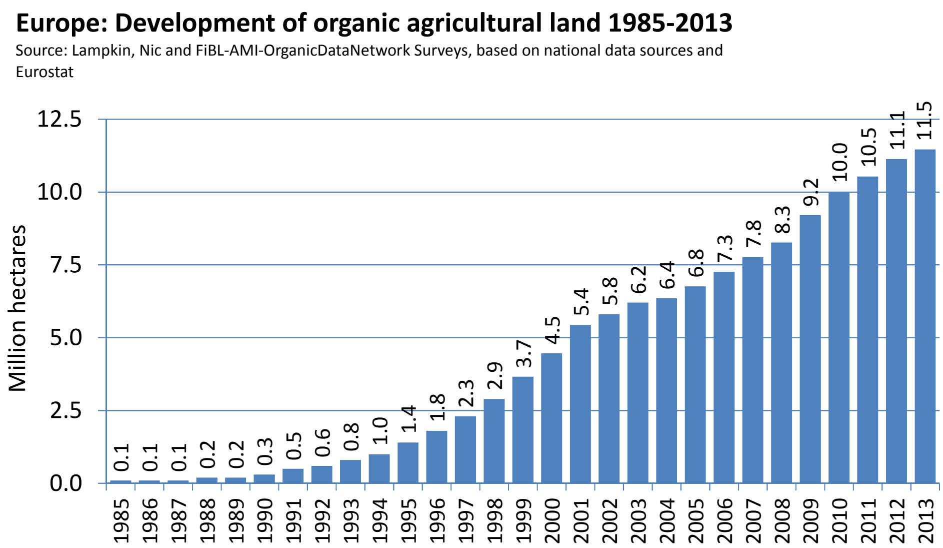


Figure 61: Europe: Development of organic agricultural land 1985-2013

Source: Lampkin, Nic and FiBL-AMI-OrganicDataNetwork based on national data sources and Eurostat

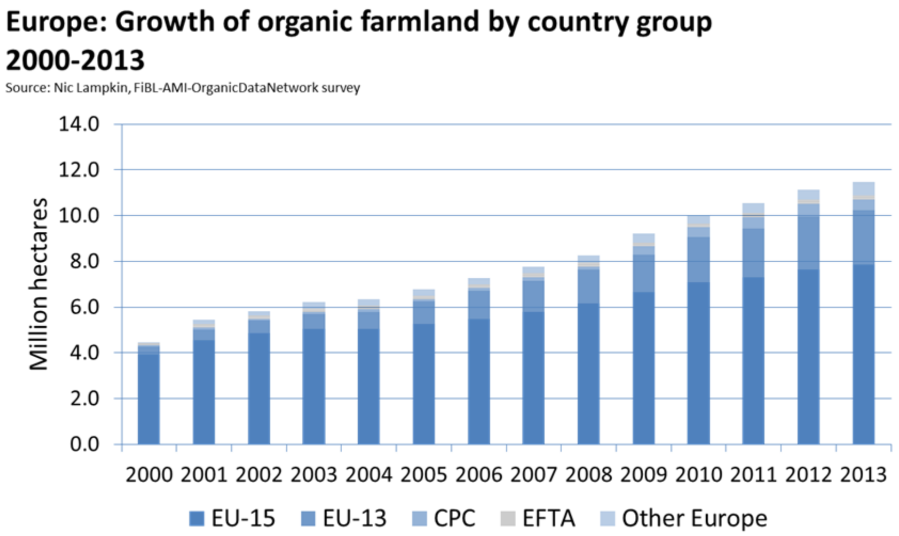


Figure 62: Growth of organic agricultural land by country group, 2000-2013
Source: FiBL-AMI-OrganicDataNetwork 2015 based on national data sources and Eurostat

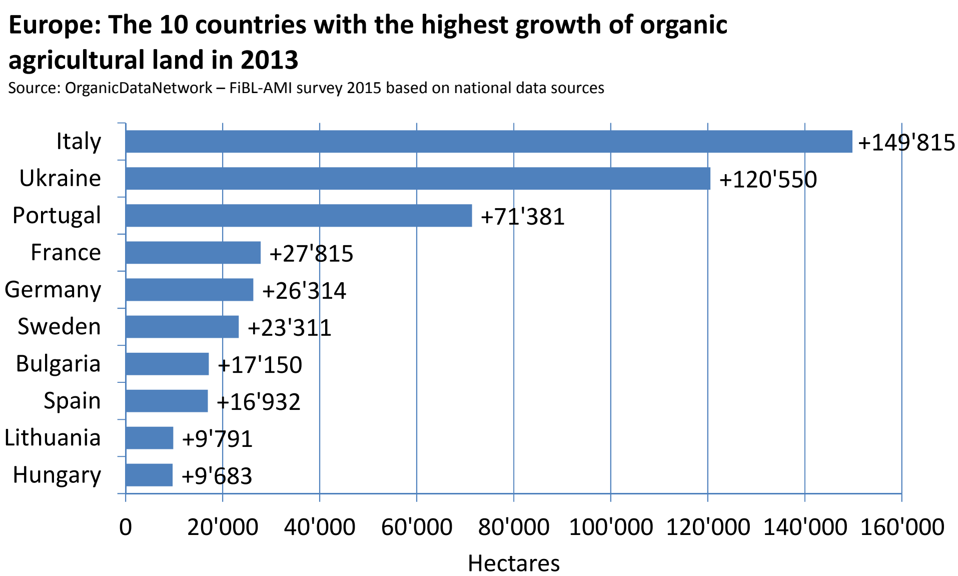


Figure 63: The 10 countries with the highest growth of organic agricultural land in 2013
Source: OrganicDataNetwork- FiBL-AMI survey 2015 based on national data sources and Eurostat

Organic Land Use and Crops

Land use

For all countries in Europe, land use and crop details are available. In this respect, Europe differs substantially from other parts of the world, for which such data is often not supplied. In 2013, in Europe, 4.6 million hectares (3.9 million hectares in the EU) were used for arable crops (40 percent of the agricultural land), and 4.8 million hectares or 42 percent of the farmland were used as grassland (EU: 4.6 million hectares). Approximately 1.3 million hectares, or 11 percent of the farmland, were used to grow permanent crops (EU: 1.16 million hectares) (see Table 50).

About half a million hectares of grassland (permanent and temporary, as well as green fodder) are under conversion, as well as 0.3 million hectares of cereals, 0.17 million hectares of olives, 80’000 hectares of grapes, and 56’000 hectares of nuts.

Table 50: Organic agricultural land by land use type 2013

In million hectares	EU [EU15]	EU [EU13]	European Union	CPC	EFTA	Other	Europe
Arable land crops	2.95	0.95	3.90	0.32	0.064	0.31	4.60
Permanent crops	1.04	0.11	1.16	0.13	0.002	0.009	1.30
Permanent grassland	3.34	1.27	4.63	0.02	0.11	0.07	4.82
Total **	7.84	2.39	10.23	0.48	0.19	0.56	11.46

Source: OrganicDataNetwork-FiBL-AMI survey 2015 based on national data sources Eurostat
Note: Total includes other agricultural land and land for which no further details were available.
CPC = EU candidate and potential candidate countries

The area for all land use types has grown steadily since 2004, even though there was a slight decrease of arable land and permanent grassland in 2013. The largest increase was for permanent crops, which almost tripled since 2004 (Figure 65).

By country, the largest permanent grassland or grazing areas are in Spain, followed by Germany and the UK. The largest cropland areas (i.e. arable and permanent crops together) are in Italy (0.8 million hectares), Spain (0.7 million hectares), and France (0.6 million hectares). Apart from the agricultural land, there are large areas of wild collection in Europe, 13 million hectares in total. The largest are is in Finland (berries) followed by a number of South Eastern European countries.

In summary, it can be said that organic food production in the Europe countries provides a wide range of products in accord with market demands. Organic production in the new member states has filled many gaps for the EU-15 (countries that were members of the European Union before 2004), where production volumes of raw materials are insufficient. Due to the lack of processing facilities in the new member states and further countries, there is a demand for processed items, many of which are imported from the EU-15 countries. All European countries depend on imports of tropical crops such as bananas, coffee, and sugar.

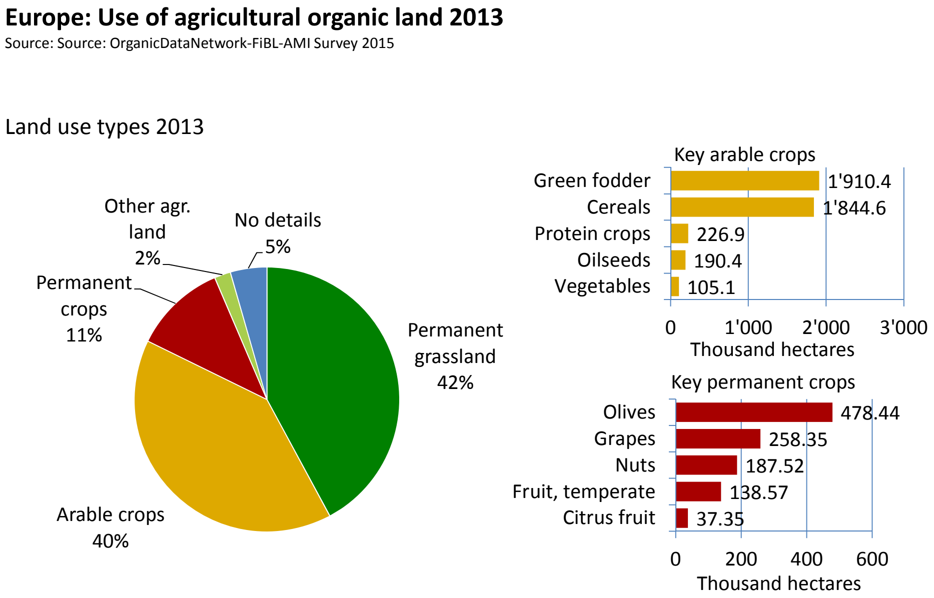


Figure 64: Land use in organic agriculture in the Europe, 2013
Source: OrganicDataNetwork-FiBL-AMI survey 2015

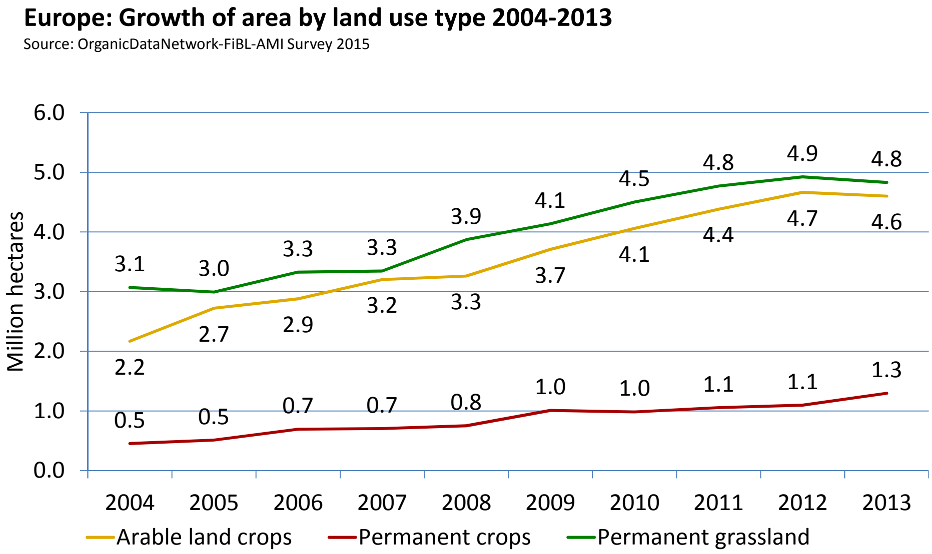


Figure 65: Growth of organic agricultural land by land use type 2004-2013
Source: OrganicDataNetwork-FiBL-AMI survey 2015

Arable and permanent crops

In Europe, 4.6 million hectares were categorised as arable land in 2013. The countries with the largest arable crop areas are Italy, France, and Germany. The key arable crop group is green fodder (1.9 million hectares), followed by cereals (1.85 million hectares). Italy, Germany, and Spain have the largest cereal areas. In 2013, organic vegetables were grown on 105'000 hectares; key producing countries were Italy, France, and the United Kingdom (including potatoes in the vegetable area). From 2004 to 2013, of the arable crops, the largest growth was noted for protein crops (+220 percent), followed by green fodder from arable land (+200 percent), oilseeds (+157 percent) and cereals (+107 percent). The highest organic shares are reached for protein crops (5.4 percent) mainly because the conventional protein crop area has been decreasing for many years due to the availability of cheap soybeans on the world market. Vegetables reach comparatively high shares (2.1 percent) because the high consumer demand for fresh vegetables is being fulfilled. For details see Table 54.

In Europe, 11 percent of the agricultural land was used to grow permanent crops (1.3 million hectares; 8.3 percent of all permanent crops). The countries with the largest areas of permanent cropland are Spain, Italy, and France. A large part of the permanent cropland is used for olives, grapes, and nuts. Whereas, for most permanent crops, the EU-15 countries have the largest areas, the EU-13 countries have considerable areas of temperate fruits (e.g., apples in Poland) and berries in the Baltic countries. Both Polish apples (in concentrates) and Baltic (frozen) berries can be found in juices or yogurts all over Europe. High growth rates from 2004 to 2013 were achieved, particularly for nuts (+258 percent), grapes (+249 percent), and temperate fruit (+215 percent). The organic shares for permanent crops were higher than those for the arable land: 11.6 percent for nuts, 10 percent for berries, and 8.3 percent for olives. For details see Table 54.

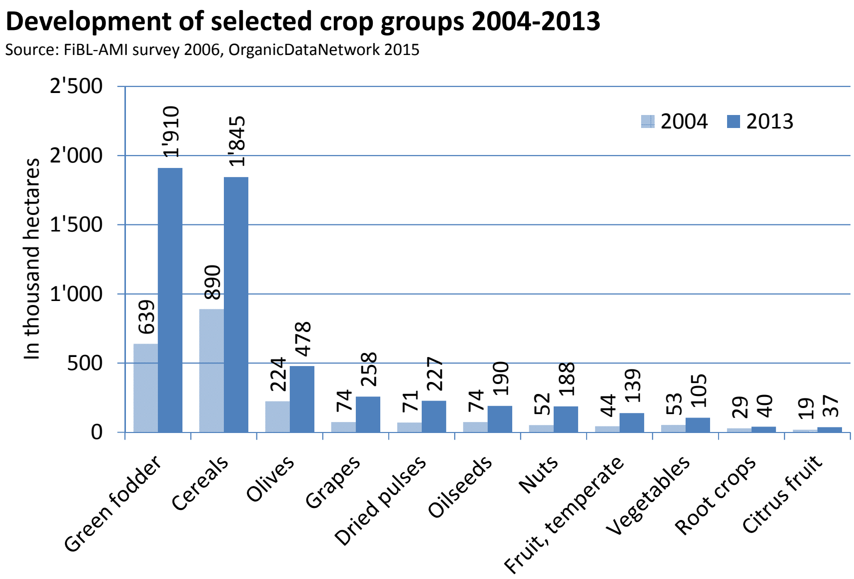
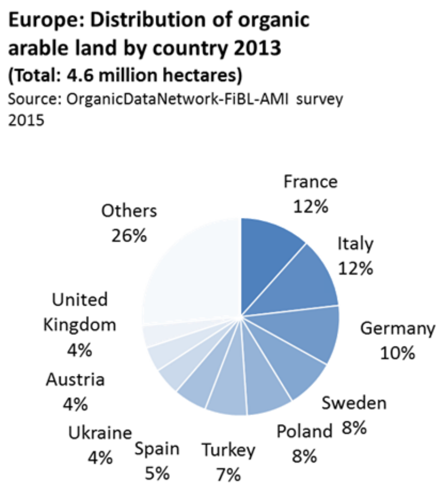


Figure 66: Growth of selected arable and permanent crop groups in Europe 2004 and 2013
Source: OrganicDataNetwork-FiBL-AMI survey 2015



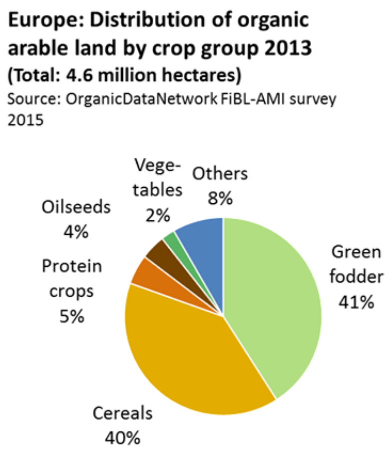
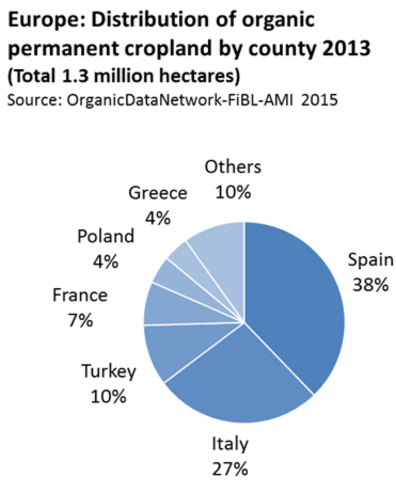


Figure 67: (Left): Europe: Distribution of organic arable land by country 2013
Figure 68: (Right): Europe: Distribution of organic arable land by crop group 2013
Source: OrganicDataNetwork-FiBL-AMI survey 2015



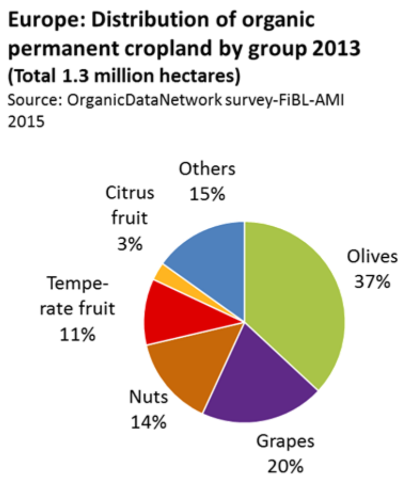


Figure 69: (Left): Europe: Distribution of organic permanent cropland by country 2013
Figure 70: (Right): Europe: Distribution of organic permanent cropland by crop group 2013
Source: OrganicDataNetwork-FiBL-AMI survey 2015

Animal husbandry

In many countries, organic animal husbandry began with beef, milk and sheep production. Livestock products continue to have the highest organic shares within the sector. The conversion of more extensive production of beef and sheep that graze on grassland is comparably easy. The conversion of monogastric animals like pigs and poultry is far more complicated and requires much higher price surpluses for the farmers. This is due to the requirements for animal husbandry in the EU regulation and dependence on partially expensive forages. Statistics on the number of organic animals are incomplete and do not allow, for the moment, for a complete picture of the sector. However, taking into account available information, the organic animal sector is developing at a fast pace in the European Union (European Commission 2014).

The following should be noted: For the Eurostat data and national data, no clear distinction is made between the number of animals slaughtered and the places or average numbers of stock over the year, and it is not always clear which of these is given when “livestock numbers” are quoted. Adding up the data for pigs and poultry over all countries, therefore, has weaknesses. The data that are presented here should, therefore, be treated as an approximation to the overall picture.

In Europe, 3.2 million heads of bovine animals, 4.5 million sheep, 0.7 million pigs, and 35 million heads of poultry were kept. The strongest increase between 2007 and 2013 was noted for poultry: +78 percent. However, beef and dairy cattle also grew substantially: (+50 percent), followed by pigs (+32 percent) and sheep (+29 percent) (Table 51). Organic animal production still remains limited in comparison with the total animal production in Europe and the European Union (between 0.5 and 4 percent depending on the animal species). The pork sector has the lowest weight. This stems partly from the difficulties posed by the provision of organic animal feed and the high price premiums consumers have to pay for pork, as well as poultry. The highest shares are found in the sheep and bovine sectors; these meat types are considered to be of premium level in the conventional market as well and realise higher prices; thus, organic premiums are smaller.

Table 51: Organic livestock in Europe and the European Union 2013[1]

	Europe			European Union		
	Animals [heads]	Share of all animals	Increase 2007-2013	Animals, [heads]	Share of all animals	Increase 2007-2013
Bovine animals	3'366'763	2.7 %	+51%	3'108'312	3.9 %	+50 %
Sheep	4'446'751	2.9 %	+29%	4'156'842	4.2 %	+26 %
Pigs	673'874	0.4 %	+32%	644'866	0.5 %	+31 %
Poultry	34'867'488	1.4 %	+78%	32'738'116	2.2%	+70 %

Source: OrganicDataNetwork -FiBL-AMI survey 2015. Shares elaborated by FiBL based on FAO data (FAOSTAT 2014). It should be noted that FAOSTAT provides only totals for bovine animals, sheep, pigs and poultry without further specifications.

1 In the case of pigs, for organic only the fattening pics and breeding sows were counted.

Producers, processors and importers

In Europe, more than 330’000 organic producers were counted in 2013. In the same year, in the European Union, there were almost 260’000 producers, and globally almost two million producers were counted, with approximately one-sixth of these in Europe. Turkey is the country in Europe with the largest number of producers (65'042), followed by Italy (45'969), Spain (30’462), Poland (25'944 in 2012), and France (25'467). A large number of the organic producers were in the EU-15 (almost 195’000), and 64’000 producers were in the EU-13. Since 2004, when, in Europe, more than 165’000 producers (EU: 140’000) were counted, their number has almost doubled (Table 56, Figure 71).

In Europe, there were more than 43’000 processors in 2013 (EU: almost 42’000). It should be noted, however, that not all countries have data on the number of organic processors in their countries. According to available data, an overwhelming part of the processors are in the EU-15 (more than 39’000). These figures, even though by far not as complete as the data on organic producers, show clearly that the processing infrastructure in many countries is not so well developed yet (Table 56, Figure 71).

In Europe, more than 1’600 importers were counted in 2013 (European Union: almost 1'400). Of the entities in the European Union, almost 90 percent were in the EU-15, showing the high importance of imports in these countries, most of which have well-developed markets. In the EU-13, as well as the EU candidates, the number of importers is still low (Table 56).

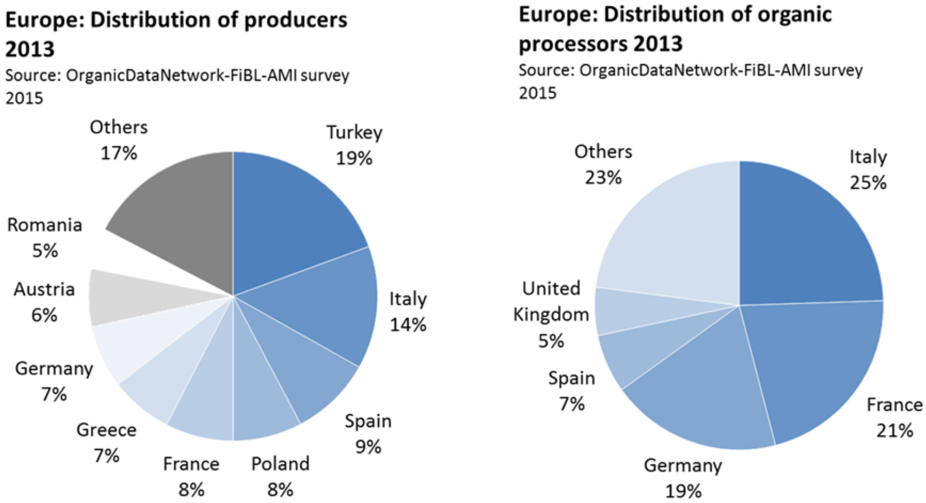


Figure 71: Distribution of organic producers and processors by country 2013
Source: OrganicDataNetwork-FiBL-AMI survey 2015, based on national data sources and Eurostat.

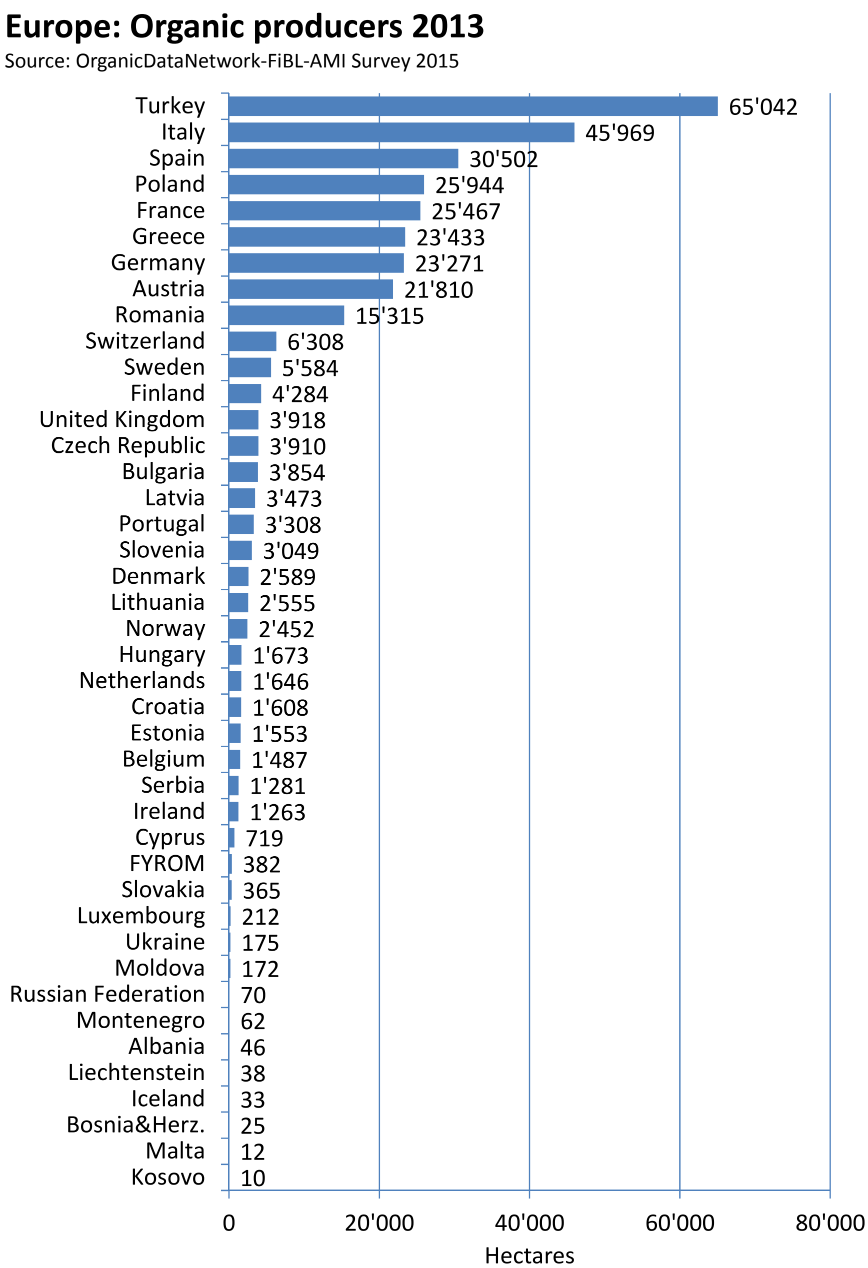


Figure 72: Europe: Numbers of producers 2013

Source: OrganicDataNetwork-FiBL-AMI survey 2013 based on national data sources and Eurostat. Only countries with ten and more producers

Domestic market development

Retail sales by country

The organic market in Europe increased by 6 percent to 24.3 billion euros (EU: 22.2 billion euros). Unfortunately, not all countries provide data on their domestic markets on a regular base (Table 57, Figure 74).

Germany is the largest market (7.6 billion euros); it is, after the United States, the second biggest organic market in the world. France held second place with 4.4 billion. It is a market that has shown very dynamic growth in the past couple of years. The UK is in third place (2.1 billion euros), followed by Italy (2 billion euros) (Figure 73).

Comparing organic markets worldwide by a single market, the United States has the lead – 43 percent of global retail sales of organic products are in this country (24.3 billion euros), followed by the European Union. Comparing retail sales by continent, North America continues to be the largest market (26.5 billion euros) (Figure 73).

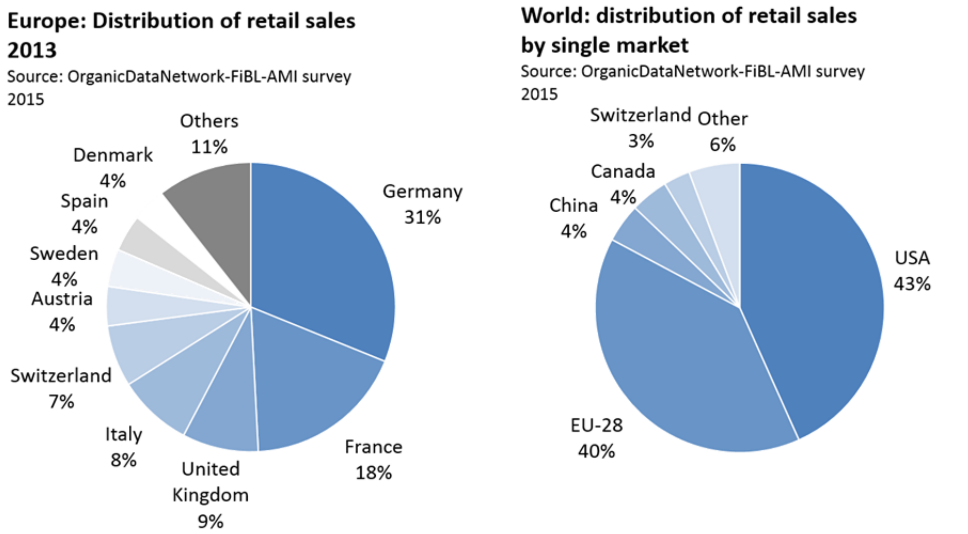


Figure 73: Distribution of retail sales in Europe 2013; Right: Distribution of retail sales by single market worldwide 2013
Source: OrganicDataNetwork-FiBL-AMI survey 2015 based on national data sources

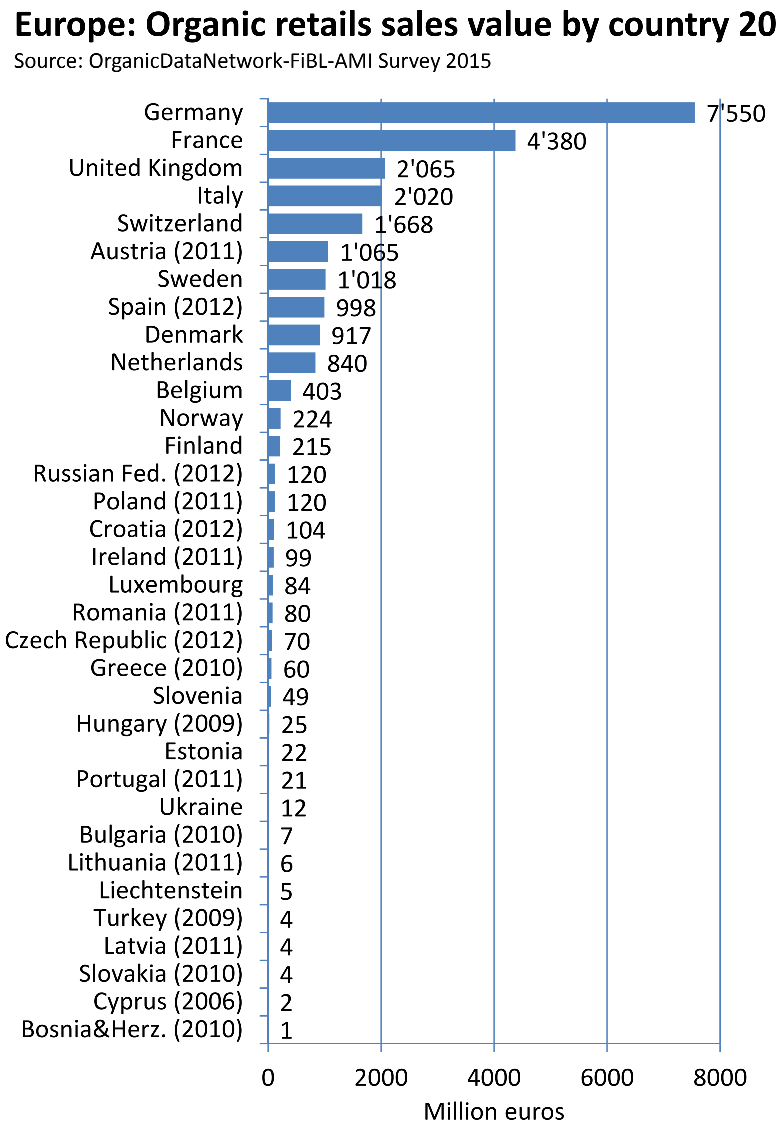


Figure 74: Europe: Retail sales by country 2013

Source: OrganicDataNetwork-FiBL-AMI survey 2015 based on national data

Market growth

The organic market in Europe and the European Union increased by approximately 6 percent in 2013. All countries, for which new data was available, showed growth. Germany, the largest market in Europe, had a growth rate of 7 percent; in France, the market grew by 9 percent. Some countries such as Norway (+16 percent), Sweden (+12 percent), and Switzerland (+12 percent), showed double-digit growth. In the United Kingdom, where retail sales decreased for four consecutive years, a return to growth was noted in 2013 (+2.8 percent).

In 2014, in many European countries, the market experienced further significant growth, and growth rates were similar to those in 2013 (final figures are expected to be available in the first months of 2015). Consumer interest in organic products remains high, even though organic products have to compete more and more with sustainability and regional labels (Figure 75, Figure 76).

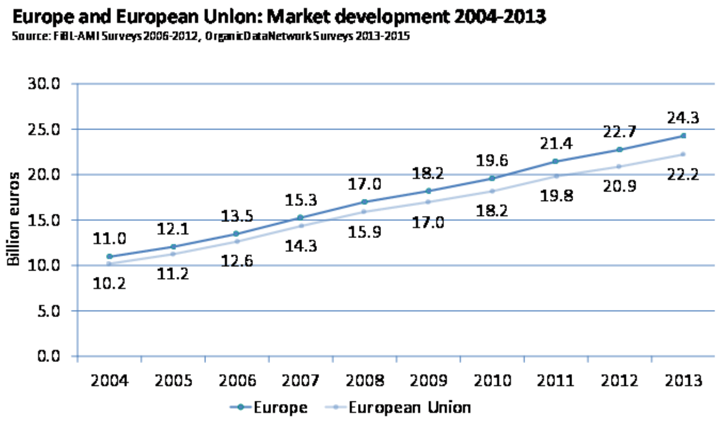


Figure 75: Organic retail sales in Europe and the EU, 2004-2013

Source: OrganicDataNetwork survey 2013 - 2015, FiBL-AMI survey 2006--2012

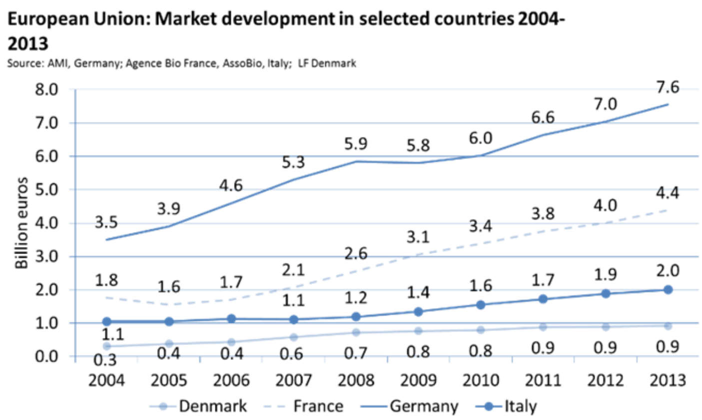


Figure 76: European Union: Market development in selected countries 2004-2013

Source: AMI, Germany; Agence Bio France; AssoBio, Italy; LF Denmark

Market shares and Purchasing Power Parities

The share organic retail sales have of all retail sales is an important indicator of the importance the organic market has in a given country. As in the past, the highest market shares were reached in Denmark (8 percent), Switzerland (6.9 percent), and Austria (6.5 percent in 2011) (Figure 76, Table 57).

The highest per-capita consumption of organic food in 2013 was in Switzerland (210 euros), Denmark (164 euros), Luxembourg (157 euros), Austria (127 euros in 2011), Sweden (107 euros), and Germany (93 euros). However, care must be taken in interpreting these figures as the costs of living differ quite considerably across countries.

The data on the per-capita consumption were, therefore, adjusted by Purchasing Power Parities. According to Eurostat (2014),

> "Purchasing power parities (PPPs) are indicators of price level differences across countries. PPPs tell us how many currency units a given quantity of goods and services costs in different countries. PPPs can thus be used as currency conversion rates to convert expenditures expressed in national currencies into an artificial common currency (the Purchasing Power Standard, PPS), eliminating the effect of price level differences across countries.
>
> The main use of PPPs is to convert national accounts aggregates, like the Gross Domestic Product (GDP) of different countries, into comparable volume aggregates. Applying nominal exchange rates in this process would overestimate the GDP of countries with high price levels relative to countries with low price levels. The use of PPPs ensures that the GDP of all countries is valued at a uniform price level and thus reflects only differences in the actual volume of the economy."

When looking at the per capita consumption adjusted for Purchasing power parities for food and non-alcoholic beverages (Eurostat 2014), a different picture emerges for the European countries, and the order of the countries changes. The first place is still held by Switzerland, but the gap between Switzerland, with its high cost of living, and the next countries is a lot smaller, and second in place is no longer Denmark, but Luxembourg (Figure 78).

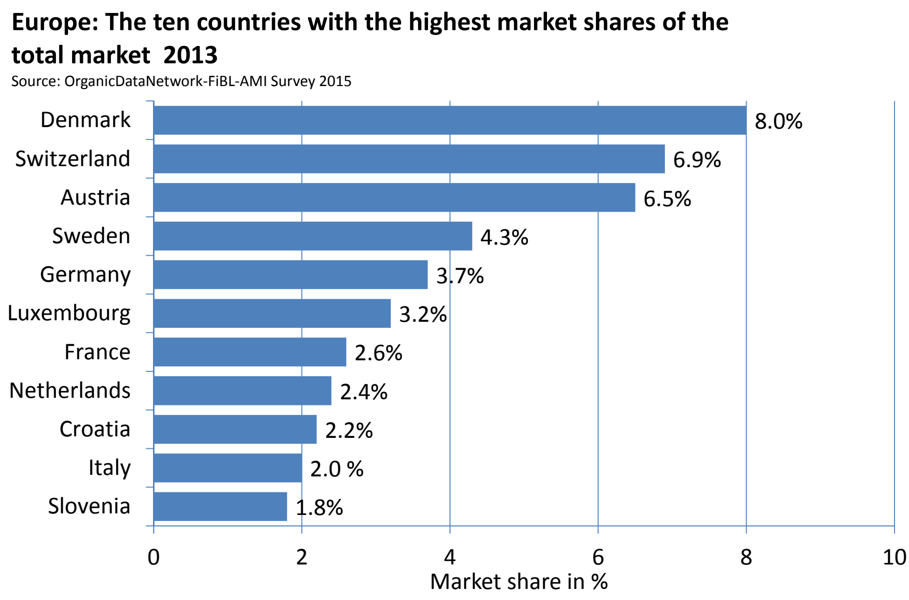


Figure 77: Europe: The ten countries with the highest market shares of the total retail sales 2013

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

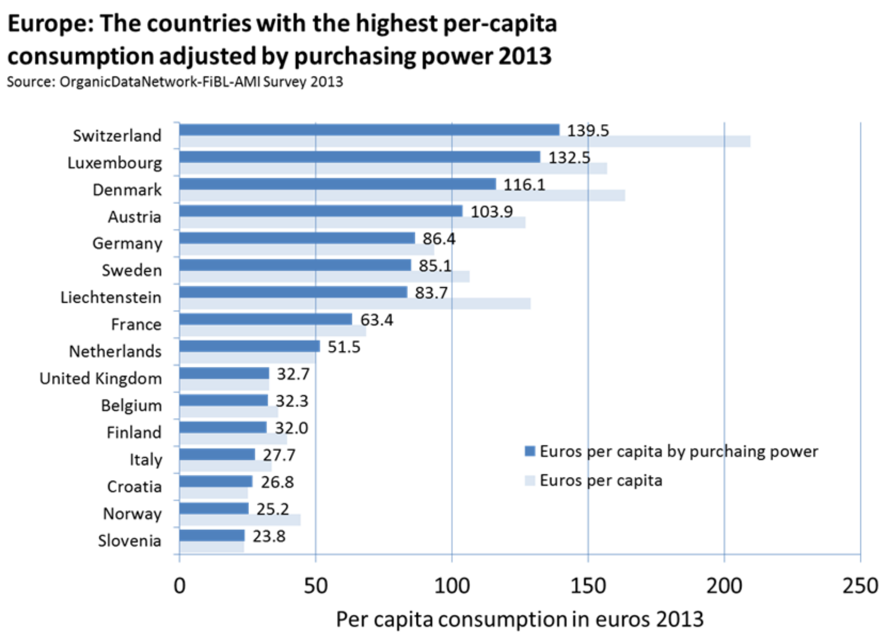


Figure 78: Europe: The 12 countries with the highest per capita consumption adjusted by purchasing power 2013

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

Shares of products and product groups with the organic segment

In many countries, the breakdown of the value of retail sales by product in millions of euros is only available for general retail, based on panel data. The figures communicated for a certain product and product group of the total market are often based on these data and do not take into account the other marketing channels. However, should be noted that, especially in countries, for which this is applied, the supermarkets have a very high market share of 80 to 90 percent.

Within the overall organic market in Europe, certain organic products are more dominant than others. The survey carried out as part of OrganicDataNetwork (Willer and Schaack 2014) shows (see also Figure 79, Figure 80, Figure 81, Figure 82):

- Fruit and vegetables are the pioneer organic products in Europe. They now have shares around 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, constitute a high share of all organic products sold (up to 20 percent). Meat and meat products are very successful and constitute around 10 percent of the organic market 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 market – more than 10 percent in France and Croatia.
- Hot beverages (coffee, tea, and cocoa) cover 3 to 5 percent of the organic market.
- Grain mill products, which are easily sold and stored in supermarkets, reach high shares in the Czech Republic and also in Finland and Norway.
- Bread and bakery products have a high importance in the organic product range, with around 10 percent in Switzerland, the Netherlands, France, Sweden, Finland, and Germany.

For all countries that were covered by the survey and provided data for their markets (Austria, Czech Republic, Finland, France, Germany, Netherlands, Norway, Spain, Sweden, Switzerland, and the United Kingdom), the following can be said: A turnover of at least 3.3 billion euros of organic fruit and vegetables was made. Dairy products accounted for at least 2.9 billion euros, followed by meat and meat products (1.5 billion), bakery products (1.4 billion), and beverages (1.1 billion).

Again, it should be noted that the data are not complete for many countries. Either certain products are not covered at all by the national collection system, or the coverage is incomplete because, for example, only the sales in the general retailers are listed.

For more information, see the OrganicDataNetwork market database at www.organicdatanetwork.net/odn-statistics-data.html.

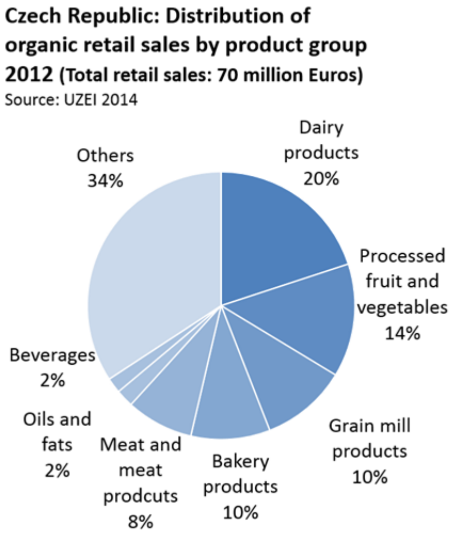
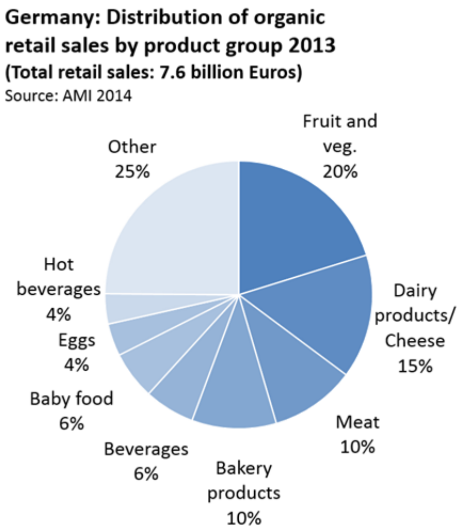


Figure 79: Czech Republic: Distribution of organic retail sales by product (group) 2012
Figure 80: France: Distribution of organic retail sales by product (group) 2013
Source: Czech Republic: UZEI; France: and Agence Bio



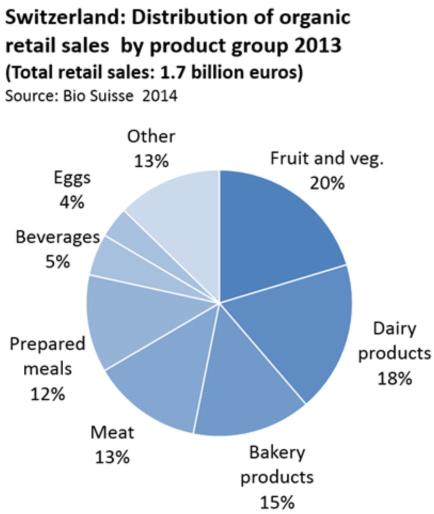


Figure 81: Germany: Distribution of organic retail sales by product (group) 2013
Figure 82: Switzerland: Distribution of organic retail sales by product (group) 2013
Source: Germany: AMI based on GfK household panel data; Switzerland: Bio Suisse

Comparison of organic products and product groups with the total market

In terms of organic market shares for organic products compared to their respective total market, one of the success stories in many European countries is eggs. According to the OrganicDataNetwork survey, they reach market shares of more than 20 percent in Switzerland and France and 10 percent or more in most of the countries for which data were available (see Table 52). The sales of eggs reflect the high concerns of consumers with regard to animal welfare and also the readiness to pay relatively high price premiums. In Germany, for example, organic eggs have, at minimum, double the price compared to conventional eggs – one of the highest price surpluses among the organic product groups.

After eggs, vegetables show the highest market shares of 8 to 13.5 percent of all vegetables sold in Switzerland, Austria, and Germany. In some countries, dairy products reach market shares of about 5 percent of all dairy products sold. In Switzerland, they even reach 10 percent. Single products can reach much higher market shares in the countries. Baby food (more than 40 percent in Germany) or meat substitutes (23 percent in Belgium and 60 percent in Germany) are good examples. 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. Often these products are highly processed and/or very cheap in the conventional market (Table 52). For more information, see the OrganicDataNetwork market database at www.organicdatanetwork.net/odn-statistics-data.html.

Table 52: Shares of organic products and product groups of their respective total markets for selected countries 2013

Product group	Austria (2012)	Belgium	Finland	France	Germany	Nether-lands	Norway	Switzerland
Beverages				2.8%	1.7% (2012)		0.1%	2.6%
Bread and bakery products		1.5%		3.7%	5.9% (2012)	3.2%	0.9%	20 % bread
Cheese	7.5%		0.9%	1.2 %	3.5%		0.6%	6.3%
Eggs for consumption	18.3%	9.9%	12%	20.6 %	13.9%	12.7%	5.7 %	21.6%
Fruit	10.0%	3.3 %		3.9%	6.6%		1.0 %	9.2%
Meat and meat products	3.7%	1.3% (Meat)	0.8%	1.5%	2.1%	2.8%	0.3%	4.2%
Milk and dairy products		2.1%	2.5%	3%	5.6%	4.8%	1.6%	10.8%
Vegetables	11.6%	5.2 %	3.0% veg. & fruit	3.6 %	8.3%	3.9 % veg. & fruit	2.6%	13.5%

Compiled by: OrganicDataNetwork-FiBL-AMI 2015; Sources: Austria (only general retailers): RollAMA/AMA Marketing; Belgium (only general retailers): GfK Panel services Benelux; Finland: Pro Luomo, France: Agence Bio; Germany: AMI based on GfK household panel data; Netherlands: Bio Monitor; Norway: Norwegian Agriculture Agency (only general retailers); Switzerland (only general retailers): Bio Suisse

Note: Due to classifications and nomenclatures 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 shares of organic products.

Marketing channels

Some countries are in a position to break down their retail sales data by marketing channel. Some are even able to provide a breakdown by product and marketing channel. Some countries have data for catering sales, in addition to total retail sales that include direct marketing and box schemes. Wherever possible, the figure for the catering sales was deducted from the figure for the total organic market.

Figure 83 on the marketing channels shows that the importance of the various marketing channels differs from country to country. In the past, countries with a strong involvement by general retailers showed a strong growth of their organic markets (e.g. Austria, Denmark, Switzerland, and United Kingdom). However, the financial crisis showed the danger of a strong dependence on supermarkets. In those years, in the UK, the market decreased, and in Germany, stagnation was noted for general retail sales, whereas it continued to grow in the specialized channels. France, Italy, and Germany are good examples of countries with strong market growth, while, at the same time, specialized retailers play a very important role. Growing levels of professionalization, including growing shop spaces, have contributed to this development. In Germany, a recent study has shown that Alnatura – an organic brand whose products are mostly sold in the organic supermarket chain of the same name as well as in the drugstore chain "dm"- was the most popular food brand in the country (Brandmeyer Markenberatung 2014).

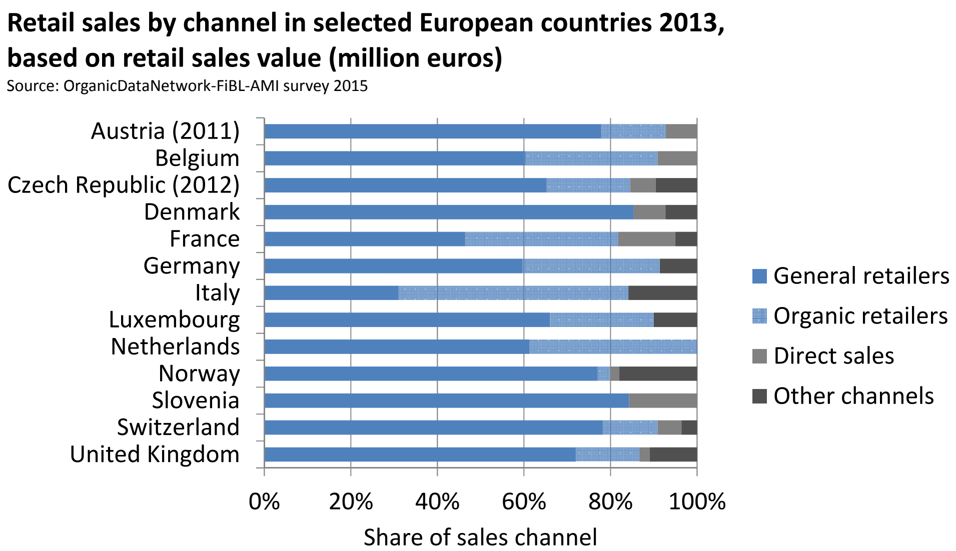


Figure 83: Europe: Marketing channels for organic products in selected countries 2013
Source: OrganicDataNetwork-FiBL-AMI survey 2015 based on national data sources

International trade

In many countries, the growth of demand for organic products outpaces the growth of organic food supply. This is true, in particular, for the major markets such as Germany, France, and Switzerland. These countries do not only need products like coffee, bananas, or off-season fruits and vegetables, but also products that could be produced in the countries themselves. Generally, however, there is a strong preference for domestic products in the countries that farmers, processors, and politicians like to fulfil. Intra-EU trade and imports from third countries represent an important part of domestically consumed organic products. Dependence on imports (whether from EU member states or third countries) seems to be particularly high in the new member states and concerns primarily processed products.

A recent study from Germany shows that Germany is not only the largest market for organic products in Europe but also one of its largest organic producers. In spite of this fact, in business year 2012/13, Germany imported 6 to 94 percent of such organic raw or fresh products that could also have been produced in the country (Schaack et al., 2014). For example, 43 percent of the organic apples are imported (mainly from Italy) as well as 42 percent of the carrots (mainly from the Netherlands and Israel). Twenty-five percent of the wheat and 51 percent of grain maize came from other countries, mainly from Romania, Ukraine, Hungary, and others. Unfortunately, with the exception of Denmark, France, and recently Germany, no country supplies data on exports and imports on a regular basis, and it is difficult to draw clear conclusions on the developments of exports and imports in the European Union and Europe. The case of Denmark shows that, from 2003 to 2013, exports increased by 550 percent and imports by 500 percent.

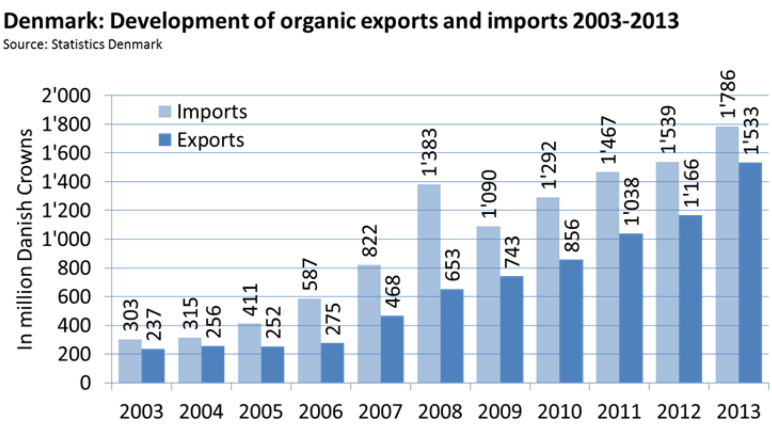


Figure 84: Denmark: Development of organic exports and imports 2003 to 2013
Source: Statistics Denmark 2015

Conclusion

Current available data on organic farming and the market in Europe and globally show that, in an international context, the European organic sector is well-developed. Relatively high shares of agricultural land, a continual growth of the area and number of operators, as well as a fast-growing market, show the exceptional dynamics that this market has in a global context.

The short data analysis provided in this report shows, however, that there are still large discrepancies among the countries. Even though some of countries in Central Eastern Europe have reached considerable shares of organic agricultural land, consumer spending, - although growing - remains low as a proportion of total spending on food in these countries. An issue of particular concern is the low number of processors, showing that the processing infrastructure - and thus the preconditions for adding value to organic products for export or, more importantly, for placing them on the domestic market - is still underdeveloped.

Another issue that needs to be solved is that of data availability. For instance, imports and exports play a very important role in trade within the European Union and for the its international trade with external partners, but almost no data exists. Furthermore, whilst the availability of domestic market data is improving, it is collected with a wide range of methods and, strictly speaking, is not accurately comparable. The OrganicDataNetwork project (www.organicdatanetwork.net), funded under the 7th research framework programme of the European Union, contributed to a more detailed overview of the European organic market. The main challenges that were encountered when storing organic market data in one common database were data gaps, incomplete data, inaccessible data; non-harmonized definitions, nomenclatures, and classification; and data consistency issues (Willer and Schaack 2014b). While the OrganicDataNetwork online database improves the availability and accessibility of organic market data, it also shows the current shortcomings clearly. Therefore, we recommend that data availability and accessibility be increased; that classifications, nomenclatures, and definitions, in particular for organic market data, be harmonized; and that data quality be improved (Willer and Schaack 2014a).

Acknowledgements

The authors gratefully acknowledge financial support from the European Union's Seventh Framework Programme for Research, Technological Development and Demonstration under grant agreement no 289376 ("Data network for better European organic market information" - OrganicDataNetwork). The contents of this article are the sole responsibility of the authors, and it does not represent the views of the European Commission or its services. The Commission is not liable for any use that may be made of the information.

The authors would like to thank all of those who have provided data and information for this report, in particular, the partners of the OrganicDataNetwork project.

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Willer, Helga and Schaack, Diana (2014b) D4.4 Final revised database. Research Institute of Organic Agriculture (FIBL), Frick, Switzerland.

Country tables: Abbreviations

- EU-15: Member countries in the European Union prior to the accession of ten candidate countries on 1 May 2004.The EU-15 are: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden, United Kingdom.
- EU-13: The countries that became a member of the European Union in or after May 1, 2004: Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia, Slovenia.
- CPC: The candidate and potential candidate countries of the European Union: Albania, Bosnia & Herzegovina, Iceland, Kosovo, The former Yugoslav Republic of Macedonia, Montenegro, Serbia , Turkey
- EFTA: European Free Trade Association: Iceland, Liechtenstein, Norway, Switzerland.

Organic Agriculture in Europe: Tables

Table 53: Europe: Organic agricultural land 2012 and 2013, growth and share of total agricultural land

Not for all countries 2013 data were available.

	Country	Area 2012 [ha]	Area 2013 [ha]	Share of total agr. land [%]	Change 2012-2013 [%]
EU [EU15]	Austria	537'706	526'689	19.5%	-2%
	Belgium	59'718	62'529	4.6%	+5%
	Denmark	175'113	169'298	6.4%	-3%
	Finland	197'751	206'170	9.0%	+4%
	France	1'032'941	1'060'756	3.9%	+3%
	Germany	1'034'355	1'060'669	6.4%	+3%
	Greece	462'618	383'606	4.6%	-17%
	Ireland	52'793	52'793	1.3%	
	Italy	1'167'362	1'317'177	10.3%	+13%
	Luxembourg	4'130	4'448	3.4%	+8%
	Netherlands	48'038	49'425	2.6%	+3%
	Portugal	200'151	271'532	8.1%	+36%
	Spain	1'593'197	1'610'129	6.5%	+1%
	Sweden	477'685	500'996	16.3%	+5%
	United Kingdom	590'009	567'751	3.3%	-4%
EU [EU15] total		*7'633'567*	*7'843'967*	*6.1%*	*+3%*
EU [EU13]	Bulgaria	39'137	56'287	1.8%	+44%
	Croatia	31'903	40'641	3.1%	+27%
	Cyprus	3'923	3'923	2.7%	
	Czech Republic	468'670	474'231	11.2%	+1%
	Estonia	144'150	151'256	16.0%	+5%
	Hungary	130'609	140'292	3.3%	+7%
	Latvia	195'658	200'433	11.0%	+2%
	Lithuania	156'539	166'330	5.7%	6%
	Malta	37	37	0.4%	
	Poland	661'956	661'956	4.3%	
	Romania	288'261	288'261	2.1%	
	Slovakia	166'700	166'700	8.8%	
	Slovenia	35'101	38'664	8.4%	+10%
EU [EU13] total		*2'322'643*	*2'389'010*	*4.7%*	*+3%*
CPC	Albania	515	662	0.1%	+29%
	Bosnia and Herzegovina	343	292	0.0%	-51%
	Kosovo	111	114	0.0%	+3%
	Macedonia (FYROM)	12'731	3'146	0.3%	-75%
	Montenegro	3'068	3'068	0.6%	
	Serbia	6'340	8'228	0.2%	+30%
	Turkey	523'627	461'396	1.9%	-12%
CPC total		*546'735*	*476'906*	*1.4%*	*-13%*
EFTA	Iceland	8'240	9'710	0.4%	+18%
	Liechtenstein	1'086	1'137	31.0%	+5%
	Norway	55'260	51'662	4.8%	-7%
	Switzerland	125'961	128'140	12.2%	+2%
EFTA total		*190'547*	*190'649*	*4.3%*	
other European countries	Andorra		1	0.0%	-
	Belarus			0.0%	-
	Channel Islands	260	260	3.0%	
	Faroe Islands	253	253	8.4%	
	Moldova	22'102	22'102	0.9%	
	Russian Federation	146'251	144'255	0.1%	-1%
	Ukraine	272'850	393'400	1.0%	+44%
other European countries total		*441'716*	*560'271*	*0.2%*	*+27%*
Total Europe		**11'135'208**	**11'460'773**	**2.4%**	**+3%**
European Union		**9'956'210**	**10'232'947**	**5.7%**	**+3%**

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2015 based on Eurostat and national data sources. For data sources see annex, page 281

Table 54: Europe: Land use in organic agriculture 2012 and 2013

Main use	Main crop category	Area 2012 [ha]	Area 2013 [ha]	Change 2012/2013 [%]
Agricultural land and crops, no details	Agricultural land and crops, no details	124'836	226'394	+81%
Arable land crops	Arable crops, no details	78'835	130'277	+65%
	Cereals	1'902'703	1'844'578	-3%
	Flowers and ornamental plants	9'594	7'417	-23%
	Green fodder from arable land	1'962'504	1'910'391	-3%
	Hops	192	183	-4%
	Industrial crops	6'596	10'290	+56%
	Medicinal and aromatic plants	32'455	40'787	+26%
	Mushrooms and truffles	302	180	-40%
	Oilseeds	192'591	190'419	-1%
	Protein crops	245'640	226'947	-8%
	Root crops	45'834	40'011	-13%
	Seeds and seedlings	3'720	3'991	+7%
	Strawberries	2'954	3'311	+12%
	Sugarcane		3	-
	Textile crops	13'386	9'244	-31%
	Tobacco	914	1'133	+24%
	Vegetables	104'757	105'123	0
	Arable land, other	59'714	75'087	+26%
Arable land crops total		*4'662'691*	*4'599'369*	*-1%*
Cropland, no details		2'031	72'187	+3453%
Permanent crops	Berries	28'257	29'170	+3%
	Citrus fruit	34'196	37'347	+9%
	Flowers and ornamental plants, permanent	13	-	-100%
	Fruit, no details	7'579	2'617	-65%
	Fruit, temperate	125'761	138'566	+10%
	Fruit, tropical and subtropical	16'444	24'494	+49%
	Grapes	241'622	258'348	+7%
	Medicinal and aromatic plants, permanent	1'626	1'541	-5%
	Nurseries	82	720	+779%
	Nuts	172'425	187'515	9%
	Olives	456'373	478'445	+5%
	Tea/mate	175	34	-81%
	Permanent crops, other	12'010	137'275	+1043%
Permanent crops total		*1'096'562*	*1'296'073*	*18%*
Permanent grassland	Pastures and meadows	4'923'961	4'828'810	-2%
Other agricultural land total		*325'126*	*437'939*	*+35%*
Total		**11'135'208**	**11'460'773**	**+3%**

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2015 based on Eurostat and national data sources. For data sources see annex, page 281

Table 55: Europe: All organic areas 2013

Country	Agri-culture [ha]	Aqua-culture [ha]	Forest [ha]	Grazed non agr. land [ha]	Wild collection [ha]	Other non agr. land [ha]	Total [ha]
Albania	662				330'677		331'339
Andorra	1						1
Austria	526'689						526'689
Belarus					2'742		2'742
Belgium	62'529				3	152	62'684
Bosnia and Herzegovina	292				63'910		64'202
Bulgaria	56'287				679'845		736'132
Channel Islands	260						260
Croatia	40'641				8		40'648
Cyprus	3'923						3'923
Czech Republic	474'231						474'231
Denmark	169'298				2'648		171'946
Estonia	151'256			2'135	40'579		193'969
Faroe Islands	253						253
Finland	206'170				9'000'000		9'206'170
France	1'060'756	1			2'809		1'063'566
Germany	1'060'669						1'060'669
Greece	383'606						383'606
Hungary	140'292						140'292
Iceland	9'710			7'727	212'763		230'200
Ireland	52'793						52'793
Italy	1'317'177				62'647		1'379'824
Kosovo	114						114
Latvia	200'433						200'433
Liechtenstein	1'137						1'137
Lithuania	166'330	5'049				747	172'125
Luxembourg	4'448						4'448
Macedonia (FYROM)	3'146			8'112	198'000		209'258
Malta	37						37
Moldova	22'102						22'102
Montenegro	3'068				139'809		142'877
Netherlands	49'394						49'394
Norway	51'662						51'662
Poland	661'956						661'956
Portugal	271'532		19'533				291'065
Romania	288'261				1'082'138		1'370'399
Russian Federation	144'254				13'723		157'977
Serbia	8'228						8'228
Slovakia	166'700						166'700
Slovenia	38'665						38'665
Spain	1'610'129				38'184	11'603	1'659'916
Sweden	500'996					3'057	504'053
Switzerland	128'140			6'121			134'261
Turkey	461'396				957'261		1'418'657
Ukraine	393'400				530'000		923'400
United Kingdom	567'751		7'597				575'348
Total	**11'460'773**	**5'050**	**27'130**	**24'094**	**13'357'745**	**15'559**	**24'890'350**

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI survey 2015 based on Eurostat and national data sources For data sources see annex, page 281

Table 56: Europe: Organic producers, processors and importers by country group, 2013

Country group	Country	Producers	Processors	Importers
EU [EU13]	Bulgaria	3'854	92	3
	Croatia	1'608	61	34
	Cyprus	719	53	
	Czech Republic	3'910	471	89
	Estonia	1'553	84	
	Hungary	1'673	371	15
	Latvia	3'473	192	7
	Lithuania	2'555	108	
	Malta	12	4	2
	Poland	25'944	312	30
	Romania	15'315	105	3
	Slovakia	365	41	5
	Slovenia	3'049	193	9
EU [EU13] total		*64'030*	*2'087*	*197*
EU [EU15]	Austria	21'810		
	Belgium	1'487	787	121
	Denmark	2'589	760	
	Finland	4'284	558	72
	France	25'467	9'297	181
	Germany	23'271	8'293	308
	Greece	23'433	1'551	4
	Ireland	1'263	211	33
	Italy	45'969	10'610	260
	Luxembourg	212	43	3
	Netherlands	1'646	1'035	
	Portugal	3'308	470	7
	Spain	30'502	2'842	112
	Sweden	5'584	762	33
	United Kingdom	3'918	2'332	95
EU [EU15] total		*194'743*	*39'551*	*1'229*
CPC	Albania	46	27	4
	Bosnia and Herzegovina	24	8	
	Kosovo	10	10	
	Macedonia (FYROM)	382	7	2
	Montenegro	62	1	
	Serbia	1'281	49	33
	Turkey	65'042	118	35
CPC total		*66'847*	*220*	*74*
EFTA	Iceland	33	26	2
	Liechtenstein	38		
	Norway	2'452	496	72
	Switzerland	6'308	847	
EFTA total		*8'831*	*1'369*	*74*
other European countries	Andorra		1	
	Faroe Islands		1	
	Moldova	172		
	Russian Federation	70	39	
	San Marino		2	
	Ukraine	175	59	41
other European countries total		*419*	*103*	*41*
Europe total		**334'870**	**43'330**	**1'615**
European Union		**258'773**	**41'638**	**1'426**

Source: OrganicDataNetwork survey 2013 based on national data sources and FiBL-AMI-IAMB survey 2013, based on Eurostat and national data sources
CPC countries: EU candidate and potential candidate countries

Table 57: Europe: The market for organic food 2013

	Country	Year	Retail sales [Mio €]	€/person	Retail sales growth 2012/2013[%]	Retail sales: Share value [%]	Catering [Mio €]
EU [EU15]	Austria	2011	1'065	127		6.5%	64
	Belgium	2013	403	36	8.0 %	1.6%	
	Denmark	2013	917	163	5.2%	8.0%	127
	Finland	2013	215		6.4%	1.6%	
	France	2013	4'380		9.0%	2.6%	172
	Germany	2013	7'550	93	7.0%	3.7%	
	Greece	2010	60	5		0.4%	
	Ireland	2012	99	22		0.7%	
	Italy	2013	2'020	31	6.2%	2.0%	300
	Luxembourg	2013	84	157		3.2%	
	Netherlands	2013	840		5.4%	2.4%	144
	Portugal	2012	21	2		0.2%	
	Spain	2012	998	21		1.0%	
	Sweden	2013	1'018	106	11.5%	4.3%	
	United Kingdom	2013	2'065	33	2.8%		21
EU [EU15] total			*21'735*				
EU [EU13]	Bulgaria	2010	7	1			
	Croatia	2012	104	25		2.2%	
	Cyprus	2006	2	2			
	Czech Republic	2012	70	7		0.7%	1
	Estonia	2013	22	17		1.6%	
	Hungary	2009	25	2		0.3%	
	Latvia	2011	4	2		0.2%	
	Lithuania	2011	6	2		0.2%	
	Poland	2011	120	3		0.2%	
	Romania	2011	80	4		0.7%	
	Slovakia	2010	4	1		0.2%	
	Slovenia	2013	49	24	10.0%	1.8%	
EU [EU13] total			*492*				
CPC	Bosnia and Herzegovina	2013	1				
	Montenegro	2013					
	Turkey	2009	4				
CPC total							
EFTA	Liechtenstein	2012	5	129			
	Norway	2013	224	44	16.0%	1.1%	14
	Switzerland	2013	1'668	210	12.1%	6.9%	
EFTA total			*1'897*				
other European countries	Russian Federation	2012	120	1			
	Ukraine	2013	12	0			
other European countries total			*132*				
Europe			**24'260**	**32.6**	**Approx. 6%**		
European Union			**22'227**	**43.8**	**Approx. 6%**		

Source: OrganicDataNetwork survey based on national data sources and FiBL-AMI survey 2015. For details on data sources see annex, page 281

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 2013 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