Organic Farming and Market Development in Europe and the European Union

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This chapter is an update for some of the data presented in the article "Growth trends in European organic food and farming" (Willer et al. 2016) written by the Research Institute of Organic Agriculture (FiBL), the Agriculture Market Information Company (AMI), and IFOAM EU, and published by IFOAM EU and FiBL in the volume "Organic in Europe, 2016". Therefore, the structure of this chapter is different from the other regional statistics chapters in this book.

The article focuses on Europe and on the 28 member states of the European Union (EU), and it shows some trends of the EU-13 and the EU-15 countries. The EU-13 countries are those that became members of the European Union in or after May 2004. The EU-15 countries are member countries of the European Union prior to the accession of ten candidate countries on May 1, 2004. Furthermore, the article informs about trends in the EU Candidate and Potential Candidate countries (CPC: Albania, Bosnia-Herzegovina, Kosovo, Macedonia (FYROM), Montenegro, Serbia, Turkey), and the members of the European Free Trade Association (EFTA: Iceland, Norway, Liechtenstein, Switzerland) as well as other European countries: Belarus, Moldova, Russian Federation, and Ukraine.

At the beginning of the subchapters, each of which focuses on one of the three key indicators – area, operators, retail sales – a table with the details by these country groups is presented. At the end of the chapter, tables with the countries in alphabetical order are available.

Data collection in Europe is, like for the rest of the world, carried out among multiple information sources; however, it should be pointed out that Eurostat, the statistical office of the European Union, is constantly expanding its data collection effort in the field of organic agriculture, and most of the data on organic areas, livestock, and operators were taken from Eurostat. The Eurostat organic farming statistics are available at ec.europa.eu/eurostat/web/agriculture > Database > Organic farming. For market data, data of the private sector, market research companies, or statistical offices are used.

1 Exceptional growth in 2015: Market and production highlights

The development of the European and the European Union's (EU) organic sector in 2015 was characterised by two trends. On the one hand, the market grew at an even higher rate than in the previous years. In fact, 2015 was the first year after the financial crisis in 2008 that showed a double-digit growth rate (13 percent in Europe; 12.6 percent in the EU). On the other hand, the growth of the organic farmland continued to be slower than that of the market, but it was considerably faster than in the previous years, increasing

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by 8.2 percent in Europe and 7.8 percent in the EU. The trend of the market growing at a faster rate than the area (Figure 64) has been noticed for a couple of years, showing that production is not keeping pace with the demand of the market.

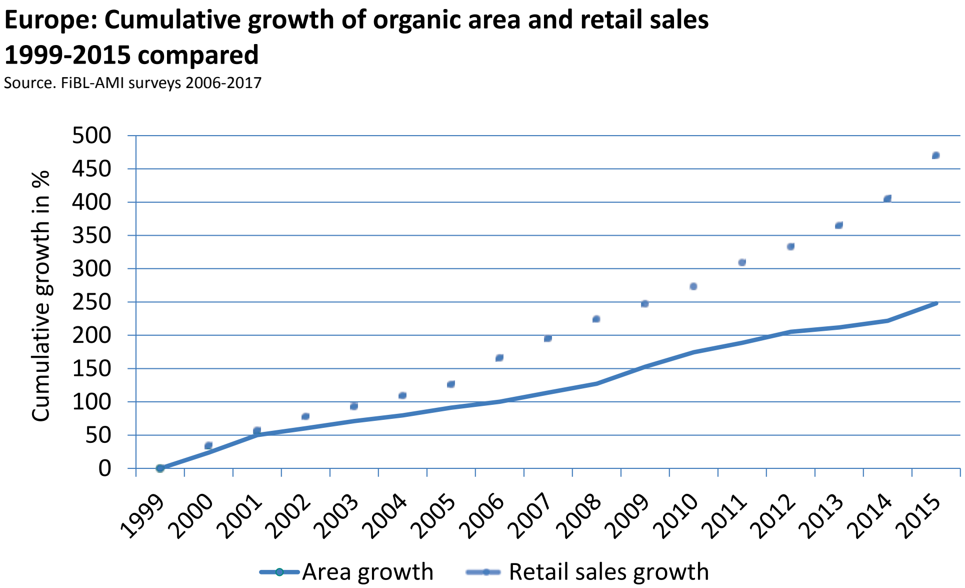


Figure 64: Europe: Cumulative growth of organic farmland and retail sales compared 1999-2015

Source: FiBL-AMI surveys 2006-2017

Production and market highlights

- In Europe, 12.7 million hectares were organic in 2015 (EU: 11.2 million hectares). With almost 2 million hectares, Spain continues to be the country with the largest organic area in Europe.
- The organic land increased by almost one million hectares in Europe (EU: 0.8 million hectares) or 8.2 percent (EU: 7.8 percent), thus showing a higher growth than in the fast five years. In the decade 2006-2015, organic agricultural land increased by two thirds (Europe 70 percent; EU 65 percent).
- In 2015, a noticeable trend was that in the EU-15 countries and the other European countries the organic area increased at double digit rates, mainly due to area increases in Spain, Italy and the Russian Federation
- Organic farmland in Europe constitutes 2.5 percent of the total agricultural land (EU: 6.2 percent). In Europe (and globally), Liechtenstein has the highest organic share of all farmland (30.2 percent); in the EU, the country with the highest share of organic agricultural land is Austria (21.3 percent).
- In Europe, arable land had the largest portion of the agricultural land (5.5 million hectares), followed by permanent grassland (5.3 million hectares) and permanent crops (1.4 million hectares). In the EU, this order is different; here the permanent grassland leads with 5.1 billion hectares, followed by arable land (4.7 million hectares) and permanent crops (1.2 million hectares). Cereals were the crop group with the largest area, and they grew by an impressive 13 percent.
- There were almost 350‘000 organic producers in Europe (EU: almost 270'000), with the largest numbers in Turkey (almost 70'000) and Italy (almost 53'000). While the number of producers grew by 4 percent in Europe (5 in the EU), growth was 72 percent (EU: 50 percent) during 2006-2015.
- In Europe, there were just about 60’000 processors (EU: more than 58’000), almost 3‘700 importers (EU: almost 3’500). The number of processors and importers increased by 12 percent and 19 percent respectively and significantly across almost all countries. The country with the largest number of processors was Italy (almost 15‘000), while Germany had the most importers (more than 1'400).
- Retail sales in Europe were valued at 29.8 billion euros (27.1 billion euros in the EU). The European Union represents the second largest single market for organic products in the world after the United States (35.8 billion euros).
- The European market recorded a growth rate of approximately 13 percent (EU 12.6 percent) and thus a double-digit growth rate for the first time since the financial crisis. The highest growth was observed in Spain (24 percent). In the decade 2006-2015, the value of European and EU markets has more than doubled.
- European consumers spent about 36.4 euros on organic food per person (EU 53.7 euros). Per capita consumer spending on organic food has doubled in the last decade. The Swiss spent the most money on organic food (262 euros per capita).
- Globally European countries account for the highest shares of organic food sales as percentage of their respect markets for food. Denmark has the highest share (8.4 percent), with individual products and product groups holding even higher shares. Organic eggs, for instance, constitute over 20 percent of all eggs sold in several countries.

2. Organic agricultural land

Table 54: Europe: Organic agricultural land by country group

Country group	Organic area [ha]	Organic share [%]	Increase 2014-2015	Increase 2006-2015
European Union	11'188'258	6.2%	7.8%	65%
EU [EU15]	8'729'608	6.8%	9.6%	58%
EU [EU13]	2'458'650	4.8%	1.7%	102%
CPC	508'080	1.1%	0%	299%
EFTA	195'778	4.9%	0%	16%
Other European countries	824'853	0.3%	23.3%	221%
Total Europe	**12'716'969**	**2.5%**	**8.2%**	**74%**

Source: FiBL survey based on Eurostat and national data sources. For country details, see Table 61.

2.1 Organic agricultural land

In 2015, 12.7 million hectares were farmed organically in Europe and almost 11.2 million hectares in the EU (Table 54). Almost 90 percent of Europe's organic farmland is in the EU. The countries with the largest areas of organic land are Spain, Italy, France, Germany, and Poland; half of Europe's organic farmland is in these countries (Figure 65, Figure 66). One-quarter of the world's organic farmland is in Europe.

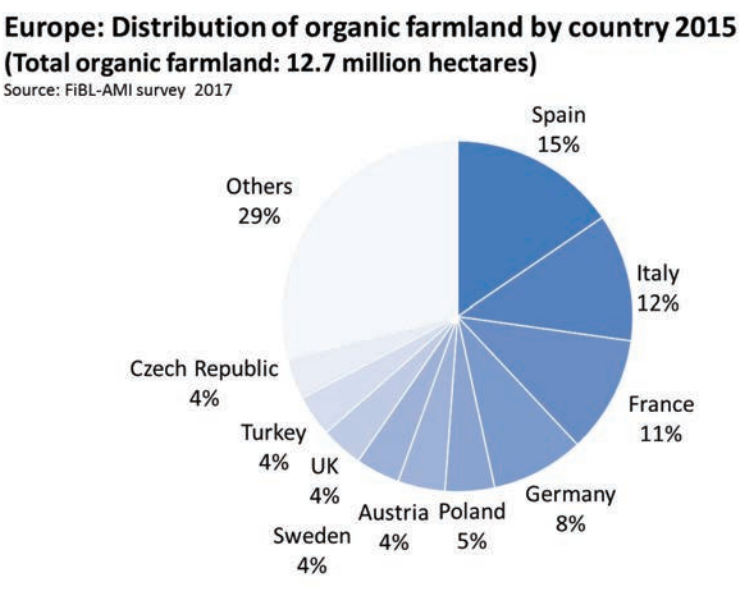


Figure 65: Europe: Distribution of organic farmland by country 2015

Source: FiBL-AMI survey 2017 based on national data sources and Eurostat
For detailed data sources see annex.

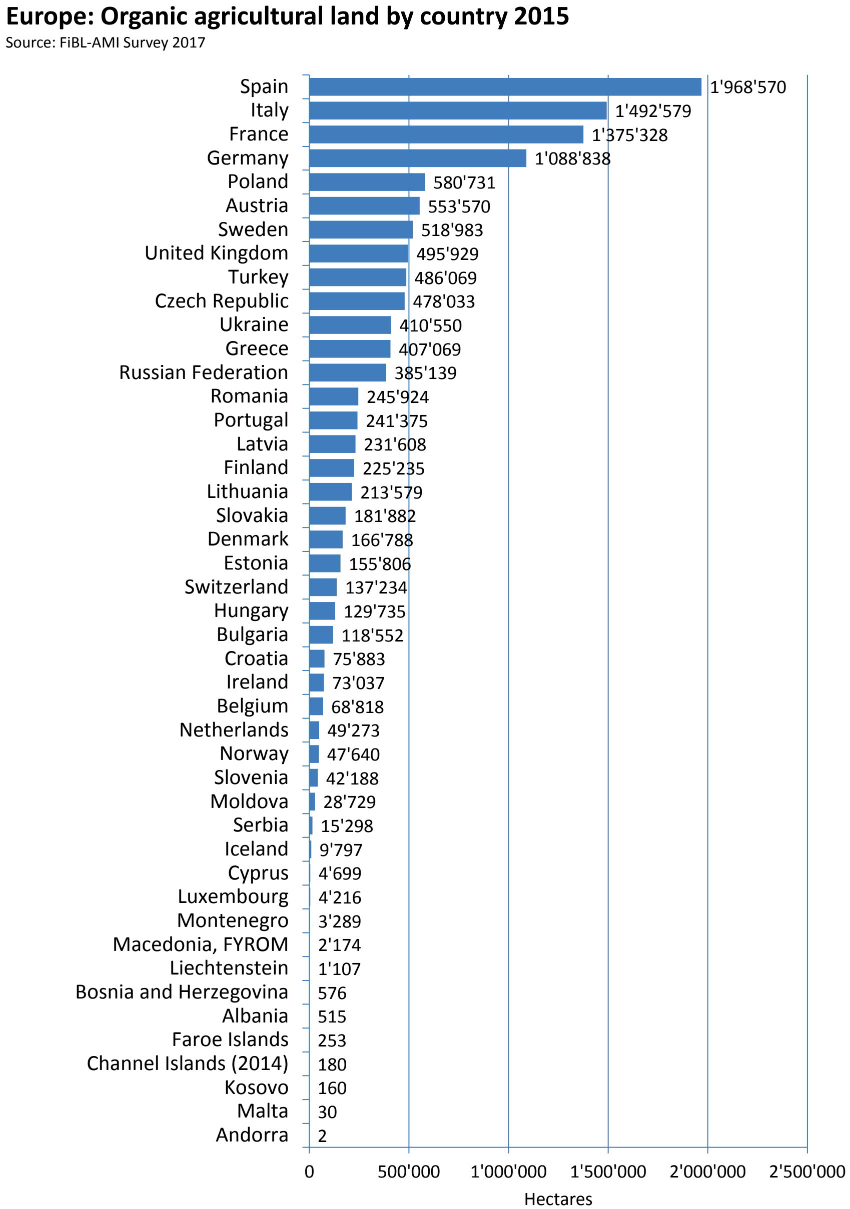


Figure 66: Europe: Organic agricultural land by country 2015

Source: FiBL-AMI survey 2017 based on national data sources.
For detailed data sources see annex.

2.2 Organic shares of total agricultural land

In Europe, 2.5 percent of the agricultural land is organic and, in the EU, 6.2 percent (Table 54). In nine countries (EU: eight), 10 percent or more of the agricultural land is organic (Figure 67). The countries with the highest organic shares are Liechtenstein, Austria, Sweden, and Estonia. Liechtenstein, with an organic share of 30.2 percent, is the country with the highest organic share in the world. In the EU-15, 6.8 percent of the agricultural land is organic, and, thus, represents a higher share than in the EU-13 (4.8 percent). For EU candidates and potential candidates (CPC), shares of the total agricultural land are still low (1.1 percent). In the EFTA countries, the organic share is 4.9 percent, but two countries, Switzerland and Liechtenstein, have considerably higher organic shares (Figure 67).

2.3 Growth of the organic land

In 2015, the organic agricultural land in Europe increased by 959'793 hectares (EU: 805'280 hectares) or 8.2 percent (EU 7.8 percent). Growth was therefore considerably faster than in the past five years; the last time similar rates were achieved was in 2010 (Figure 68).

The countries that contributed the most to this growth were Spain, France, the Russian Federation, and Italy, all with more than 100'000 hectares (Figure 69), whereas the highest relative increases were in Serbia, Bulgaria, the Russian Federation, and Croatia; all showed a growth rate of at least 50 percent (Figure 70). However, there were also countries that showed stagnation or only a small increase of organic land such as the Czech Republic, Denmark, and Slovenia. Also, in some countries, the organic area decreased, such as Turkey, Poland, and the United Kingdom.

Looking at the growth by country group, it emerges that growth was particularly strong in the EU-15 countries (+ 10 percent) and in the Russian Federation (+60 percent). Growth in the EU-13 countries (with the exception of Bulgaria and Croatia) and in the EFTA and CPC countries was modest. Switzerland, however (an EFTA country), showed an encouraging growth of 2.4 percent.

In the decade from 2006 to 2015, the organic agricultural land has increased by two-thirds in Europe and the EU. In that period, in the EU-15, growth was slower (+58 percent) than in the EU-13 countries (+102 percent). In many EU-15 countries, organic farmland had already grown before 2004 – the year when many of the EU-13 countries became EU members - to a comparatively high level. However, in 2015, this trend was reversed, and stronger growth occurred in the EU-15 countries.

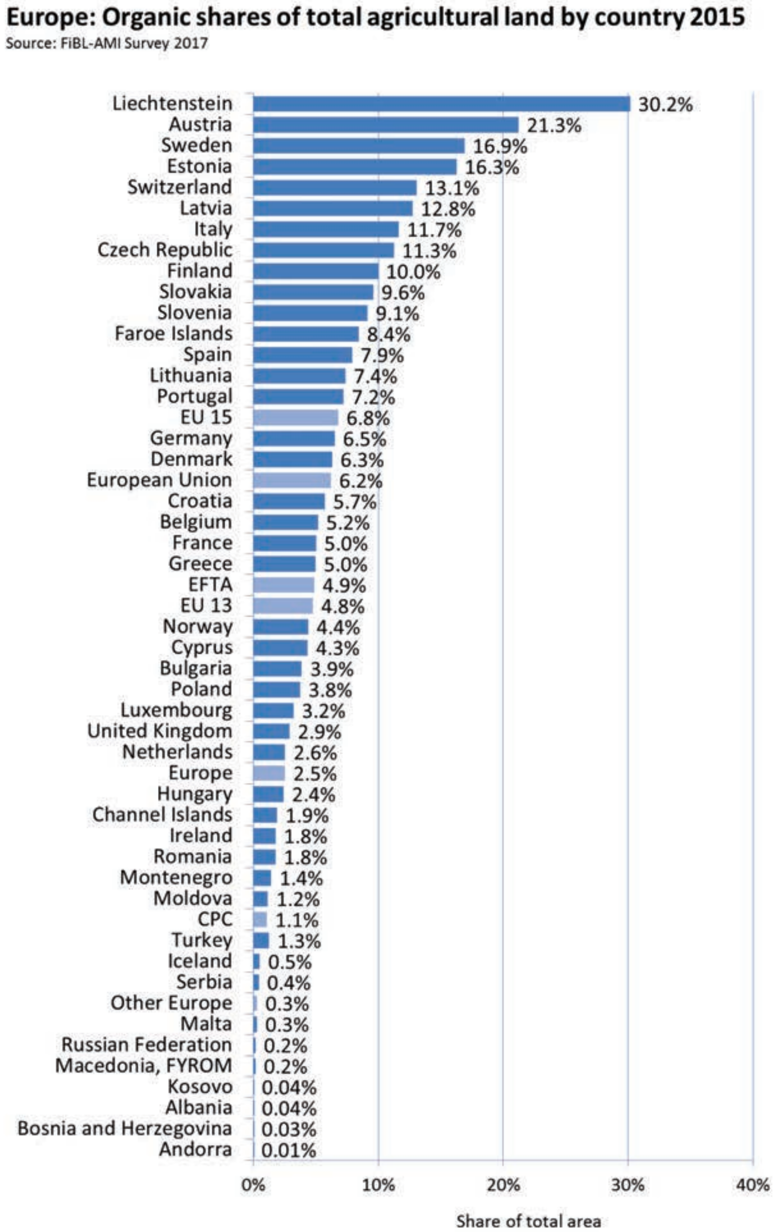


Figure 67: Europe: Organic shares of total agricultural land 2015

FiBL-AMI survey 2017 based on national data sources and Eurostat
For detailed data sources see annex of this book.

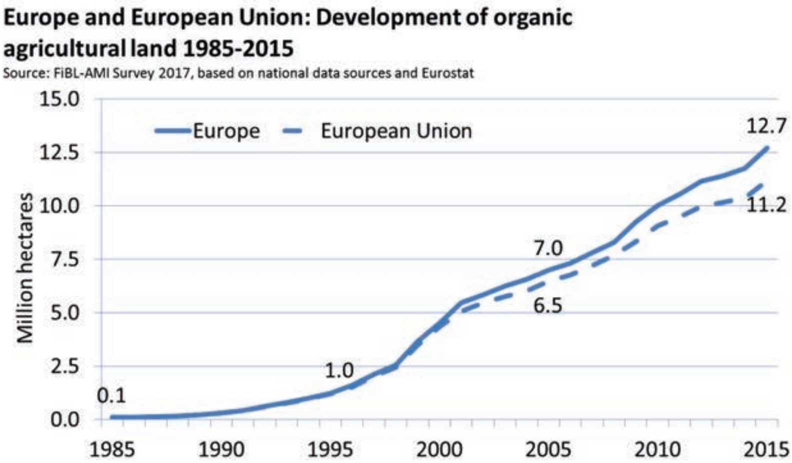
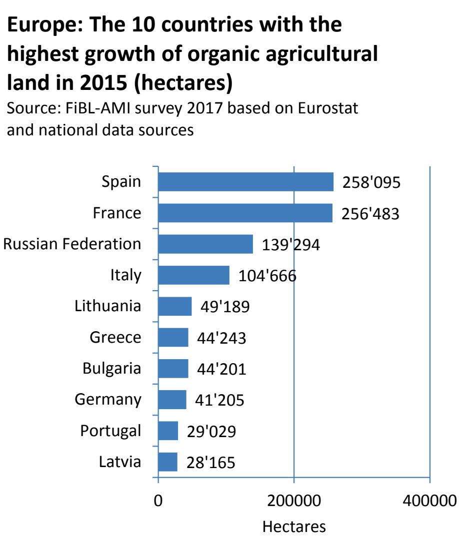


Figure 68: Europe and European Union: Development of organic agricultural land 1985-2015

Source: FiBL-AMI Surveys 2006-2017 based on national data sources and Eurostat. The data for the European Union cover all countries that were an EU member in 2015.



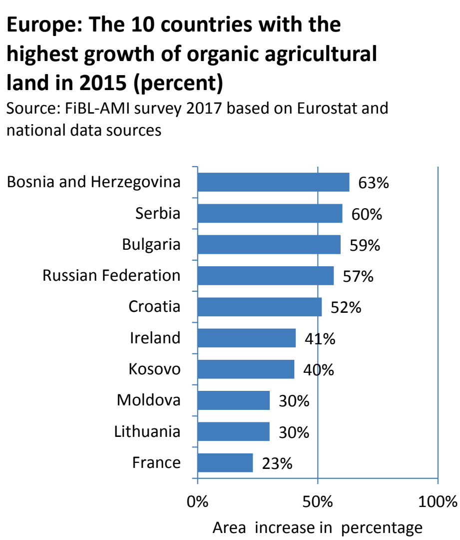


Figure 69: Europe: The 10 countries with the highest growth of organic agricultural land in hectares 2015

Figure 70: Europe: The 10 countries with the highest growth of organic agricultural land in percent in 2015

Source: FiBL-AMI survey 2017 based on national data sources and Eurostat
For detailed data sources see annex.

2.4 Conversion status of organic farmland

Most, but not all, countries provided data on their fully converted and under-conversion areas, but such details are not available for all countries – for instance, for Austria, Germany, and Switzerland (Table 62).

In Europe, of the 12.7 million hectares of organic agricultural land, 8 million hectares were fully converted (7.4 million in the EU) and 2.4 million were under conversion (2.3 million in the EU), thus reflecting the fact that in the near future an increase in supply of organic products can be expected (Figure 71).

This is confirmed by the notable trend that the in-conversion area increased by 56 percent in Europe and 66 percent in the EU (or 900’000 hectares). By country, the largest in-conversion areas are in the major European supplying countries, notably Spain (558'041 hectares), Italy (398'933 hectares), France (312'406 hectares), and Turkey (166'205 hectares).

Among arable and permanent crops, a major supply of cereals (approximately 400’000 hectares under conversion), olives (160’000 hectares) and grapes almost 80’000 hectares) may be expected. For more information, see the crop chapters in this book, page 98.

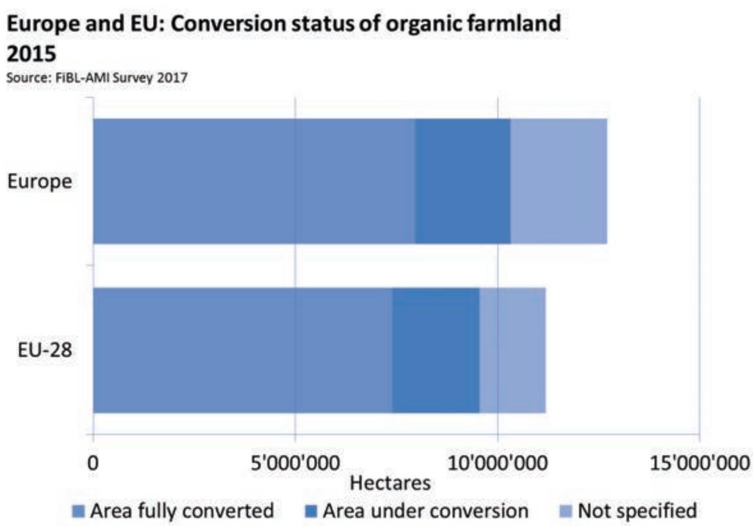


Figure 71: Europe and European Union: Conversion status of organic land in Europe and the EU 2015

Source: FiBL-AMI survey 2017 based on national data sources and Eurostat
For detailed data sources see annex.

3 Land use in and crops grown organic agriculture

Table 55: Europe: Land use in organic agriculture by country group 2015

Country group	Arable crops [ha]	Permanent crops [ha]	Permanent grassland [ha]	Other/no details [ha]	Total[ha]
European Union	4'738'463	1'229'390	5'143'122	77'283	11'188'258
EU [EU15]	3'576'060	1'110'467	3'965'805	77'277	8'729'608
EU [EU13]	1'162'403	118'924	1'177'317	6	2'458'650
CPC	328'018	157'377	22'571	114	508'080
EFTA	65'087	1'921	124'522	4'248	195'778
Other European countries	530'190	8'452	54'399	231'812	824'853
Total	**5'661'759**	**1'397'140**	**5'344'614**	**313'457**	**12'716'969**

Source: FiBL-AMI survey 2016 based on national data sources Eurostat. For country details see Table 63.
Note: Total includes other agricultural land, land for which no further details were available, and correction values for double-cropped areas.

3.1 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 available. The area for all land use types has grown steadily since 2004, even though stagnation was noted for permanent crops in 2015 (Figure 74).

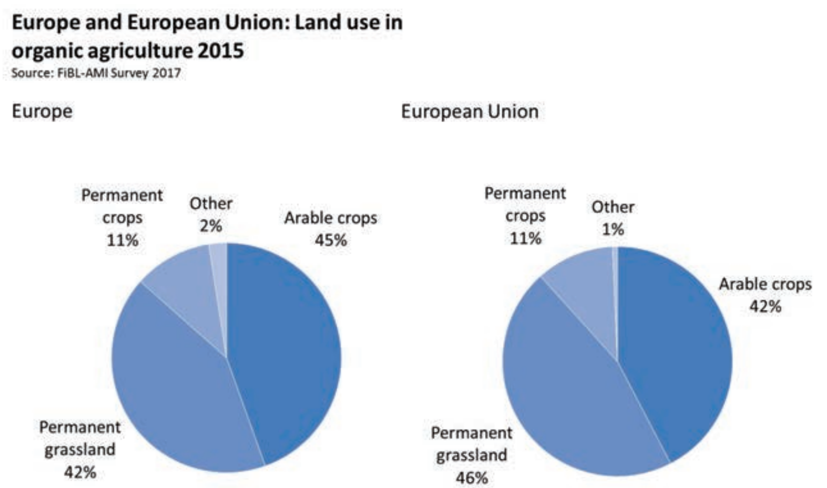


Figure 72: Europe: Land use in organic agriculture 2015

Source: FiBL-AMI survey 2017 based on Eurostat and national data sources

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Table 55 and Figure 72 show that

- arable land constituted the largest area of organic land in Europe, with 5.1 million hectares (4.1 million hectares in the EU), followed by
- 4.8 million hectares of permanent grassland (4.6 million hectares in the EU), and
- 1.4 million hectares of permanent crops (1.2 million hectares in the EU); and
- cereals were the largest crop group covering 1.9 million hectares (1.7 million hectares in the EU) (Table 55).

The largest increase in 2014-2015 was in permanent grassland (+9 percent in Europe and the EU), whereas arable land increased by 5.5 percent in Europe and by 7.4 in the EU. For permanent crops, the increase was not as high (+2.7 percent, EU +3.2 percent) grassland (Figure 74, Figure 75).

However, over the 2006-2015 decade, permanent crops more than doubled and thus showed a greater increase than arable land and permanent grassland (Figure 74, Figure 75).

By country, the largest permanent grassland or grazing areas are in Spain, followed by those in Germany and the UK (Figure 73).

The largest cropland areas (i.e., arable and permanent crops together) are in Italy (0.9 million hectares), Spain (0.8 million hectares), and France (0.7 million hectares) (Figure 73).

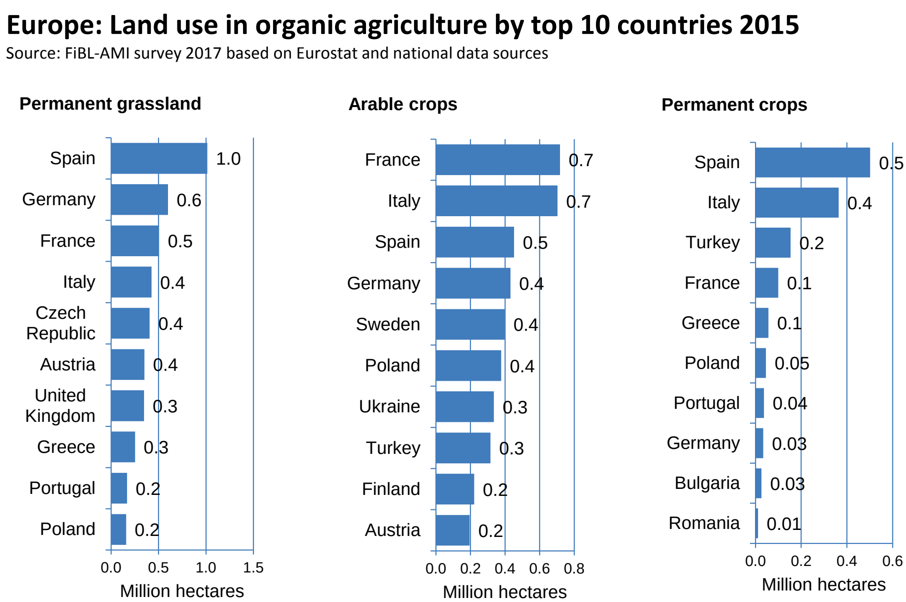

Figure 73: Europe: Land use in organic agriculture by top 10 countries 2015
Source: FiBL-AMI survey 2017 based on Eurostat and national data sources

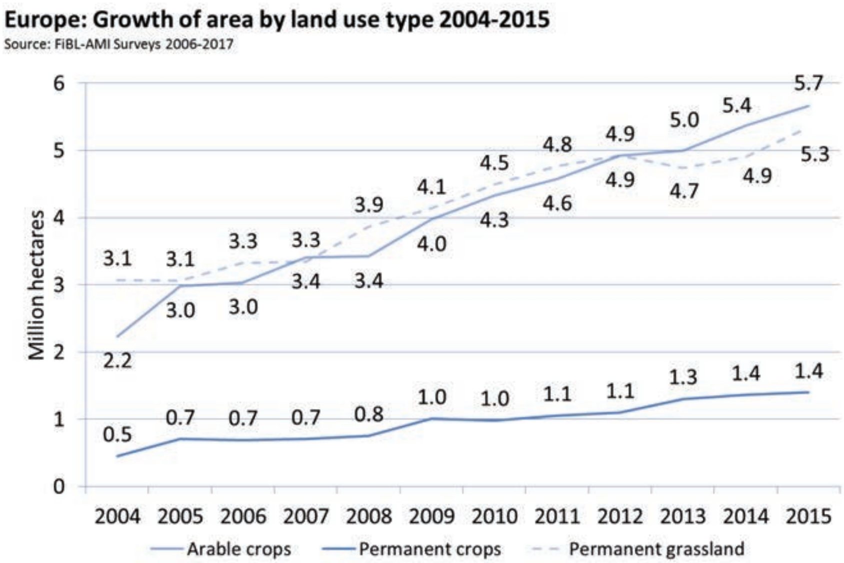

Figure 74: Europe: Growth of organic agricultural land by land use type 2004-2015
Source: FiBL-AMI Surveys 2006-2017 based on national data sources and Eurostat

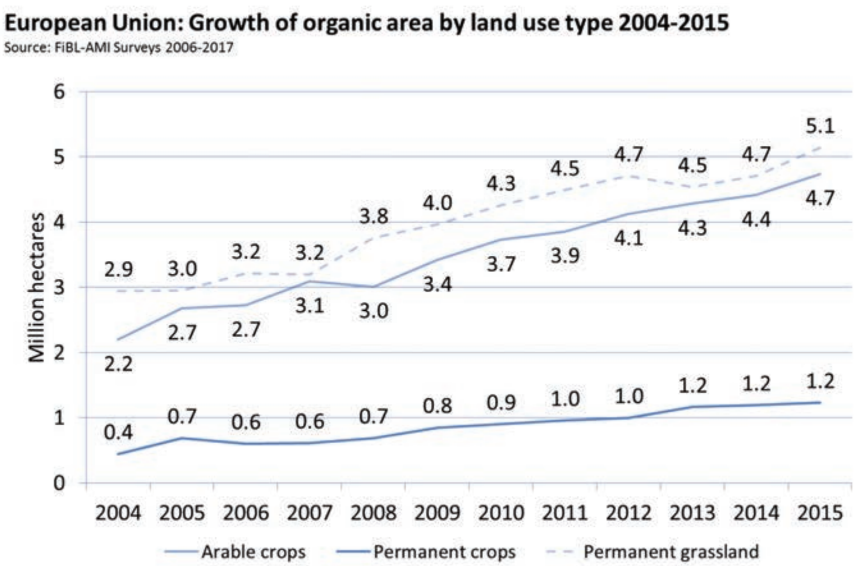

Figure 75: European Union: Growth of organic agricultural land by land use type 2004-2015
Source: FiBL-AMI Surveys 2006-2017 based on national data sources and Eurostat

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3.2 Crops grown in organic agriculture

Table 56: Europe and European Union: Key crops/crop group 2015

Land use	Crop group	Europe [ha]	EU [ha]	Organic share of total [%] (EU)	Change 2014-2015 [%] (EU)	Change 2006-2015 [%] (EU)
Arable crops	Cereals	2'232'921	1'681'274	1.7% (2.9%)	17% (10%)	70% (49%)
	Dry pulses	328'870	299'930	6.7% (21.2%)	10% (18%)	183% (195%)
	Green fodder	2'065'761	1'867'966	9.6% (11.2%)	1% (2%)	96% (93%)
	Oilseeds	298'856	210'855	1.0% (1.8%)	22% (25%)	182% (137%)
	Root crops	40'105	30'726	0.4% (0.9%)	-4%(-0.5%)	47% (34%)
	Vegetables	157'964	143'012	3.1% (6.2%)	19% (20%)	69% (61%)
Arable crops total		5'661'759	4'738'463	2.8% (5.0%)	5% (7%)	87% (74%)
Permanent crops	Berries	31'638	29'767	11.2% (17.7%)	1% (4%)	458% (436%)
	Citrus fruit	42'520	42'166	6.3% (7.7%)	9% (9%)	70% (73%)
	Fruit, temperate	141'517	120'161	4.7% (8.7%)	11% (11%)	41% (44%)
	Fruit, (sub)tropical	26'455	9'196	7.3% (3.7%)	-16% (9%)	3252% (1089%)
	Grapes	292'753	281'139	7.3% (8.8%)	10% (12%)	208% (231%)
	Nuts	219'164	189'704	13.2% (20.3%)	21% (23%)	131% (105%)
	Olives	532'083	454'152	9.1% (9.1%)	8% (9%)	84% (62%)
Permanent crops total		1'397'140	1'229'390	8.7% (10.6%)	3% (3%)	102% (105%)
Total cropland		**7'058'898**	**5'967'854**	**3.2% (5.6%)**	**5% (7%)**	**89% (79%)**

Source: FiBL-AMI survey 2016 based on national data sources and Eurostat
Note: Total includes further crops, land for which no further details were available, and correction values for double-cropped areas. For crop details by country, please check crop chapter in this book from page 98.

Whereas in Europe, the largest arable crop group was cereals (2.2 million hectares; EU: 1.7 million hectares), green fodder from arable land comprised the largest group in the European Union (1.9 million hectares; Europe 2.1 million). Italy, Germany, and Spain have the largest cereal areas in the EU. Outside the EU, Ukraine, Turkey, and the Russian Federation are major producers (see also the chapter on cereals in this volume, page 98). In 2015, organic vegetables were grown on almost 160'000 hectares of land in Europe (in the EU, more than 140'000 hectares). The largest areas were in Poland, Italy, France, and Spain. It should be noted that for some countries, potatoes are included in the vegetable category. (For country details on the categories listed in Table 56, see page 98).

From 2014 to 2015, impressive growth was noted for oilseeds (+22 percent), vegetables (+19 percent), and cereals (+17 percent), thus reflecting that European organic farmers are meeting the high demand of the market, e.g., for vegetables (see also Table 60) and feedstuffs. Between 2006 and 2015, the largest growth among the main arable crop groups was recorded by dry pulses and oilseeds (+180 percent each). Cereals grew by 70 percent (Figure 76).

Organic dry pulses achieved the highest shares (21.2 percent in the EU, 6.7 percent in Europe), mainly because the conventional crop area has been decreasing for many years due to the availability of cheap soybeans on the world market for both animal feed and human consumption (Table 56).

A large part of the permanent cropland is used for olives, grapes, and nuts. The largest areas of permanent cropland are in Spain, Italy, and France. For most permanent crops, the EU-15 countries have the largest land areas.

The EU-13 countries have considerable areas of temperate fruit (e.g. apples in Poland and berries in the Baltic countries). Both Polish apples (in concentrate) and berries from the Baltic countries can be found in juices or yogurts all over Europe. Across Europe, high growth rates were achieved between 2006 and 2015, particularly for grapes (+208 percent) and citrus fruit (+70 percent) (Figure 76).

The organic share of all permanent crops were higher than those for the arable land; however, it should be noted that particularly for nuts and berries, the FAO data, with which the organic data is compared, do not list all berries or nut types grown in organic agriculture, thus a direct comparison is not possible in all cases.

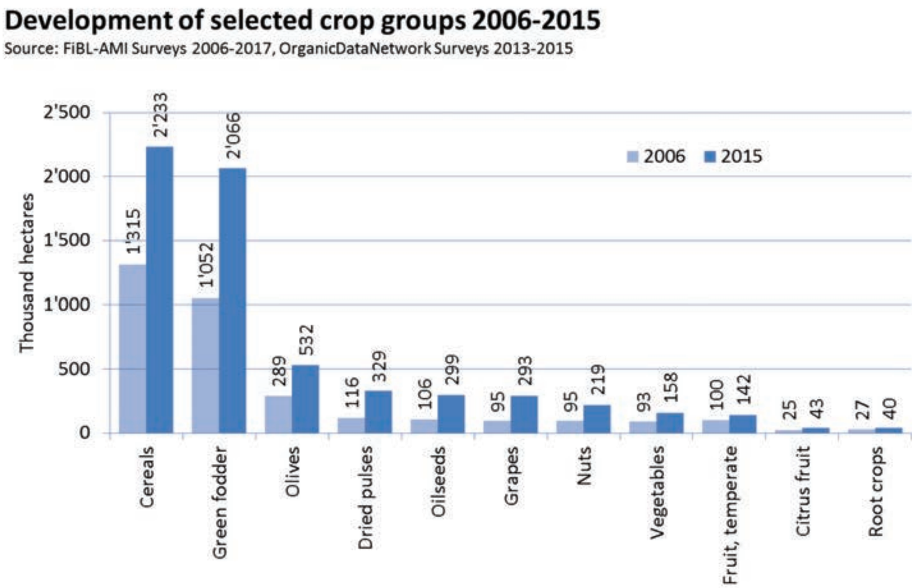

Figure 76: Europe: Growth of selected arable and permanent crop groups in Europe 2006 to 2015

Source: FiBL-AMI survey 2017

3.3 Further organic areas

In addition to agricultural land, there are further organic areas. Large parts of these are wild collection areas constituting 17.7 million hectares. The largest wild collection area in Europe (and in the world) is in Finland with 12.2 million hectares (mainly berries). For country details on wild collection areas see Table 64.

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4 Organic livestock

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 all currently available information, the organic animal sector is developing at a fast pace in the European countries.

Table 57 provides a European overview of organic livestock in 2015. In many countries, organic animal husbandry began with beef, lamb, and milk production. In Europe, 3.6 million bovine animals, 4.6 million sheep, 0.8 million goats, 0.9 million pigs, and 41 million poultry were kept. (For EU data, see Table 57).

Table 57: Europe and European Union: Organic livestock 2015

	Europe				European Union	
Animal type	Animals [heads]	Total animal share [%]	Change 2014-2015	Change 2007-2015[1]	Animals [heads]	Total animal share[%]
Cattle*	3'635'812	2.9%	2%	58%	3'418'552	4.2%
Sheep	4'631'992	3.0%	3%	35%	4'402'401	4.5%
Goats	758'592	4.6%	4%	15%	718'127	5.7%
Pigs	936'863	0.5%	7%	46%	907'968	0.6%
Poultry	41'082'017	1.7%	9%	108%	38'987'429	2.8%

Source: FiBL-AMI Survey 2016 based on Eurostat and national data sources. Data on for the calculation of organic shares are based on Eurostat and FAOSTAT Please note that growth rates 2007-2015 were similar for Europe and the European Union.
*Includes beef and dairy cattle, buffalo

Organic animal livestock numbers remain limited in comparison with the total animal numbers in Europe (between 0.5 percent and 5.7 percent, depending on the animal species). Monogastric animals (pigs and poultry) have the lowest shares, partly because of the difficulties posed by the insufficient internal supply of organic feeds, the difficulties in the provision of traceable certified feed imports, and the high price premiums consumers have to pay. The highest shares are for organic goats, sheep and cattle.

Between 2007 and 2015 (and also 2014 and 2015), the greatest increase was for poultry, which can be partly attributed to the high demand for eggs (see the chapter on the organic market) (+108 percent). However, beef and dairy cattle also grew substantially (+58 percent), as did pigs (+46 percent), sheep (+35 percent), and goats (+15 percent) (Table 57).

The numbers of organic shares of all livestock are based on FAOSTAT data (FAOSTAT 2014). FAOSTAT only provides totals for bovine animals, goats, sheep, pigs, and poultry, without further specifications. For both Eurostat and national data, no clear distinction is made, for pigs and poultry, between the number of animals slaughtered and the places

[1] Please note that in the case of livestock, for comparison, the year 2007 was chosen as European-level organic livestock data are not available from FiBL before that year. Extensive datasets on the European Union are, however, available from Eurostat.

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, is not necessarily completely reliable. The data that are presented here should, therefore, be treated as an approximation of the overall picture.

Organic milk production has almost doubled since 2007 in order to meet rising demand for milk and dairy products. Organic cows' milk production now stands at 4.7 million metric tons, constituting more than 2.9 percent of EU milk production from dairy cows in 2015. Some of this growth, however, can be attributed to improved data availability (Figure 77).

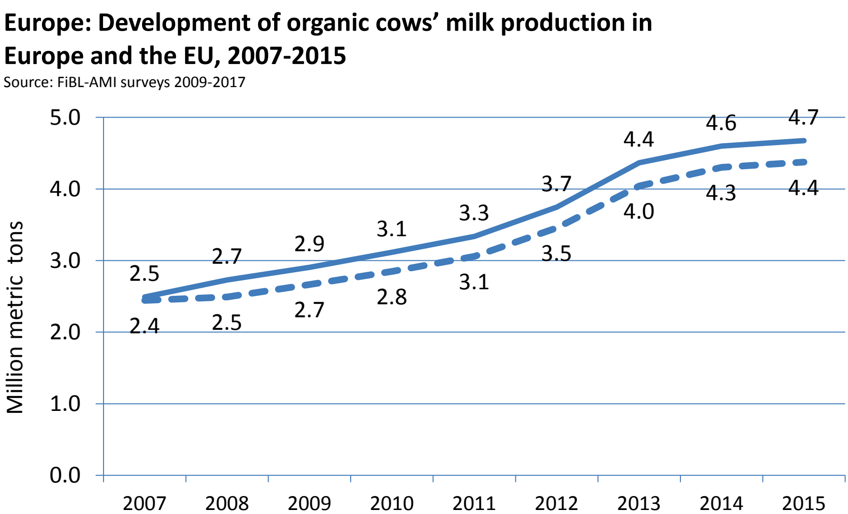


Figure 77: Europe and European Union: Development of organic cows' milk production 2007-2015

Source: FiBL-AMI survey 2009-2017

5 Producers, processors and importers

Table 58: Europe: Organic operators by country group 2015

	Producers			Processors		Importers		Exporters	
Country group	No.	Change 2014-2015	Change 2006-2015	No.	Change 2014-2015	No.	Change 2014-2015	No.	Change 2014-2015
EU-28	269'453	5%	50%	58'360	12%	3'474	19%	1'957	124%
EU15	207'425	7%	34%	55'722	12%	3'135	19%	1'759	144%
EU13	62'028	-1%	143%	2'638	14%	339	28%	198	32%
CPC	71'033	-2%	381%	1'160	23%	79	20%	88	6%
EFTA	8'431	-1%	-6%	387	-25%	77	15%	4	0%
Other European countries	344	-19%	65%	166	66%	51	-15%	51	-11%
Total Europe	349'261	3%	71%	60'073	12%	3'681	19%	2'100	107%

Source: FiBL-AMI survey 2015 based on national data sources and Eurostat For breakdown by country see Table 65. For detailed data sources see annex.

5.1 Organic producers

In 2015, there were almost 350’000 organic producers in Europe and almost 270’000 in the EU (Table 58). In the EU, the country with the largest number of producers is Italy (almost 53’000); in Europe, it is Turkey (almost 70’000) (Figure 80). Although there was not much growth in the number of producers in 2015 (+3 percent in Europe; +5 percent in the EU), over the past decade the number of producers in Europe increased by 71 percent (EU +50 percent). Fourteen percent of the world’s organic farmers are in Europe (Figure 78).

5.2 Organic processors and importers

The number of processors and importers increased in almost all European countries in 2015 (Table 58). In the EU, there were almost 60’000 processors (over 60’000 in Europe) and almost 3’500 importers (almost 3’700 in Europe). The country with the largest number of processors is Italy (almost 15’000), and the country with the most importers is Germany (1500). A large proportion of processors and importers are located in the EU-15 and Switzerland (Table 58) (Figure 79).

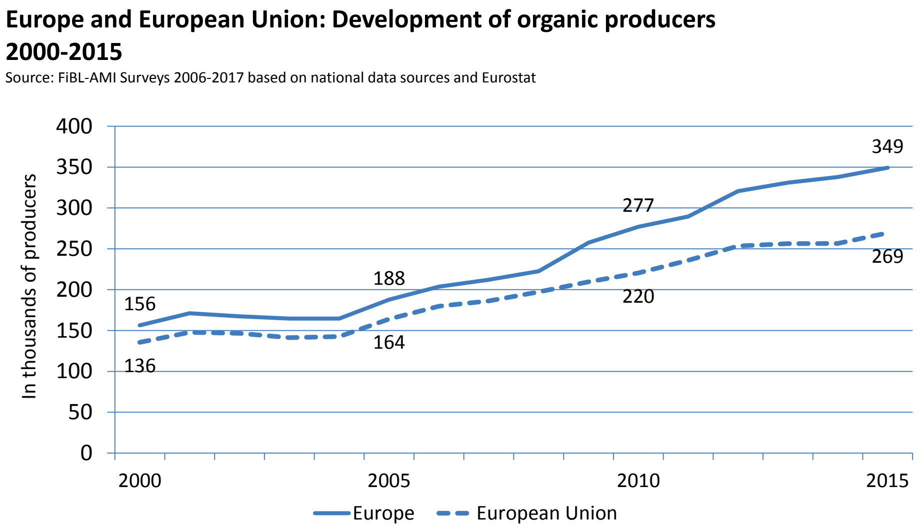
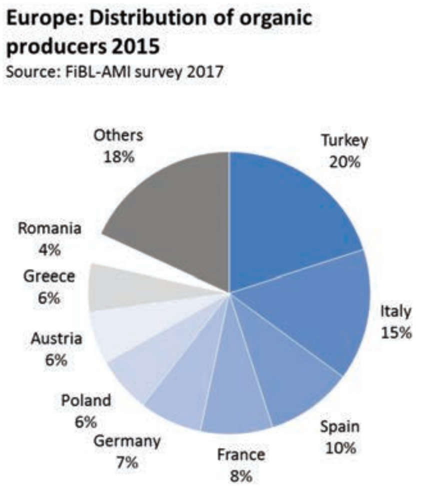


Figure 78: Europe and European Union: Development of organic producers in 2000-2015
Source: AMI Surveys 2006-2017 based on national data sources and Eurostat



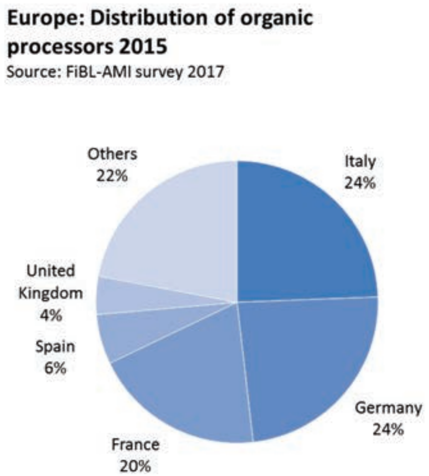


Figure 79: Europe: Distribution of organic producers and processors by country 2015
Source: FiBL-AMI survey 2017, based on national data sources and Eurostat.

Willer, H. and Lernoud, J. (Eds.) (2017): The World of Organic Agriculture. Statistics and Emerging Trends.
FiBL & IFOAM – Organics International (2017): Frick and Bonn, 2017-02-20

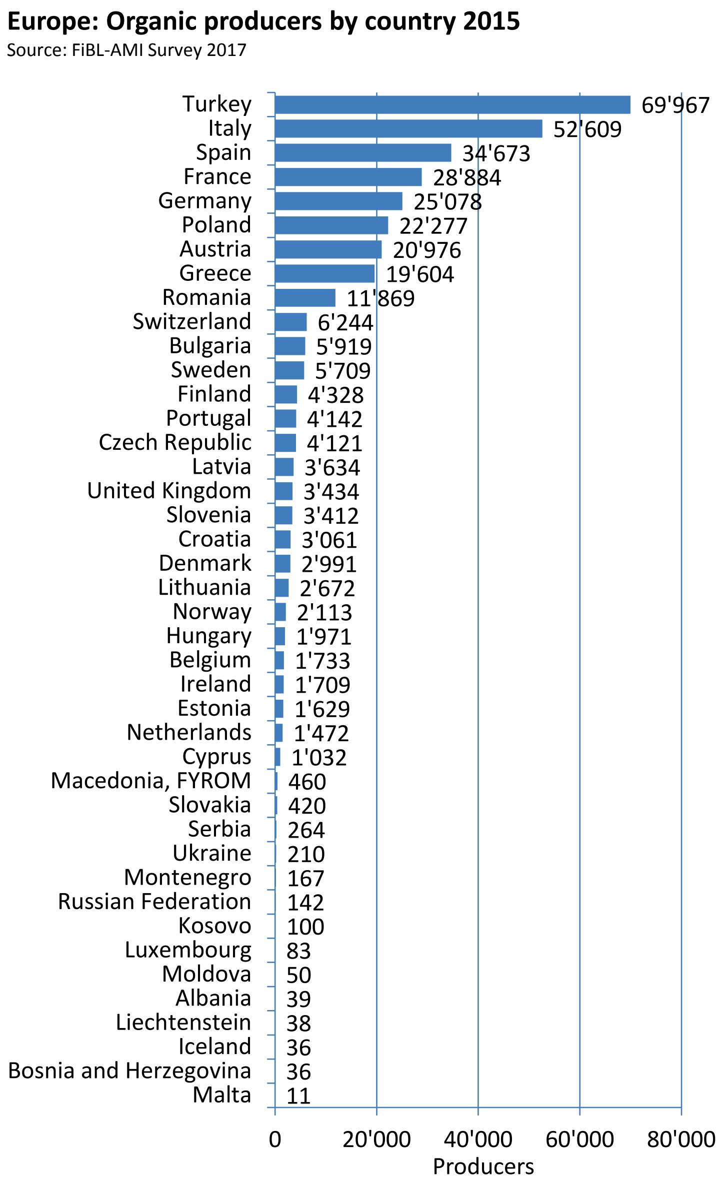


Figure 80: Europe: Numbers of organic producers by country 2015

Source: FiBL-AMI survey 2017 based on national data sources and Eurostat. For detailed data sources see annex.

6 Domestic market development

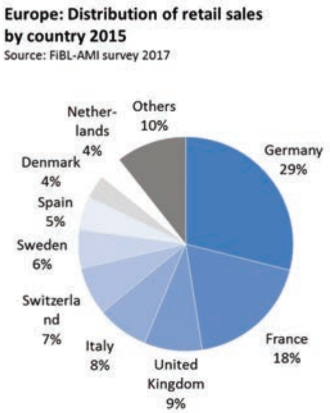
Table 59: Europe: Organic retail sales by country group 2015

Country group	Retail sales [Million €]	Per capita consumption [€]	Growth 2014-2015 [%]	Growth 2006-2015 [%]
European Union	27'107	53.7	12.6%	108%
EU [EU15]	26'586	65.9	12.7%	106%
EU [EU13]	521	5.0	9.9%	279%
CPC	4	0.2		
EFTA	2'533	183.9	18.0%	201%
Other European countries	138	0.6	2.2%	
Total Europe	**29'781**	**36.4**	**13.0%**	**114%**

Source: FiBL-AMI survey 2017 based on national data sources. For country details see Table 66.

6.1 Size of the organic market

In 2015, the organic market in Europe grew by 13 percent to 29.8 billion euros (EU: 27.1 billion euros, +12.6 percent). Unfortunately, not all countries provide data on their domestic markets on a regular basis (Table 66), and it may be assumed that the market is larger than indicated by the figures in Table 59. Germany continues to be the largest market in Europe (8.62 billion euros) (Figure 82), and, after the United States (35.8 billion euros), it is the second biggest organic market in the world. France holds second place with 5.53 billion euros. Comparing organic markets worldwide by single market, the United States has the lead: 47 percent of global retail sales of organic products are in this country (35.8 billion euros), followed by the sales in the European Union (27.1 billion euros; 35 percent of global retail sales). Comparing retail sales by continent, North America is the largest market (38.5 billion euros) (Figure 81). Please note that there has been a major shift in the importance of single markets/continents compared to 2014, data due to fluctuating exchange rates.



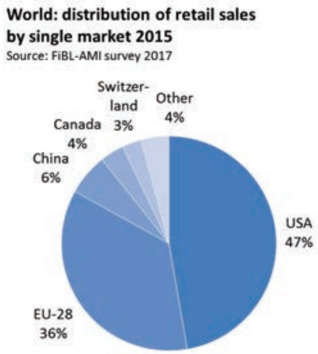


Figure 81: Europe: Distribution of retail sales by country and by single market worldwide 2015

Source: FiBL-AMI survey 2017 based on national data sources

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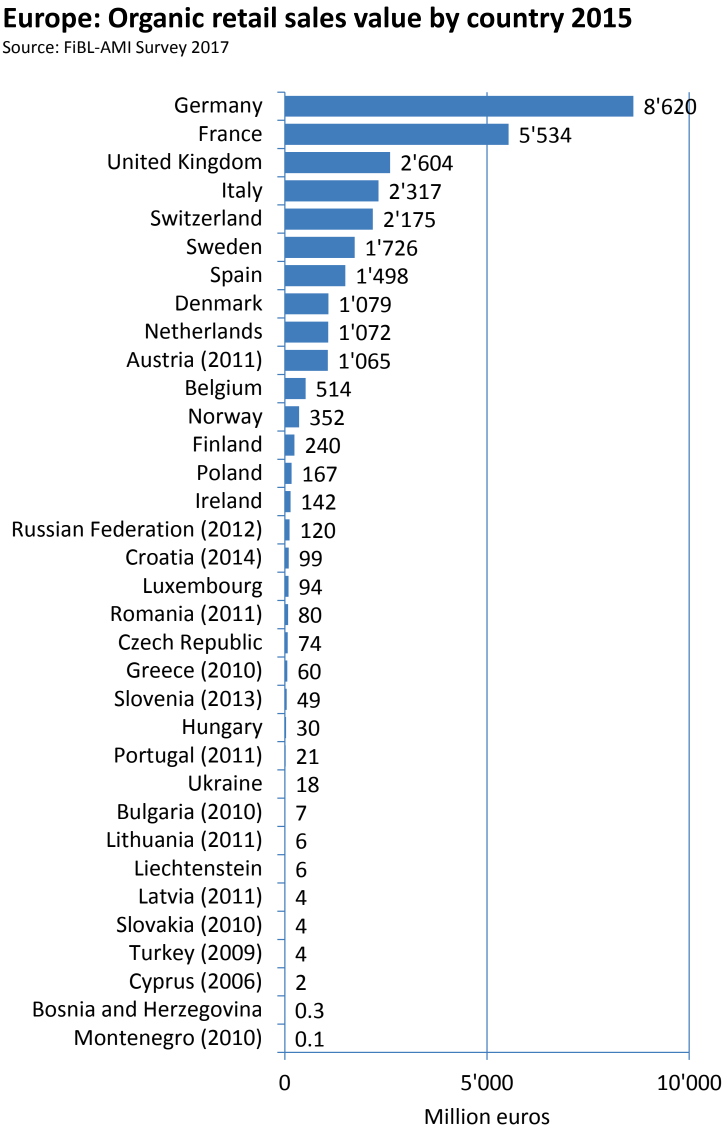

Figure 82: Europe: Retail sales by country 2015

Source: -FiBL-AMI survey 2017 based on national data sources
For detailed data sources see annex.

6.2 Growth of the organic market

The organic market in Europe and the European Union grew by approximately 13 percent in 2015. This is the first time since the financial crisis in 2008 that double-digit growth occurred in Europe as a whole. In the decade 2006 to 2015, the organic market more than doubled in size (Figure 83).

All countries for which new data was available showed growth, many double digit, with Spain leading with 24 percent (Figure 84). Germany, the largest market in Europe, had a growth rate of 11 percent; France, the second largest market, grew by 15 percent. Scandinavian countries showed strong growth, with Sweden[1] leading with a 20 percent increase (and more than 50 percent in 2014, according to revised data). Also, the Irish market grew by 24 percent (Table 66).

In the United Kingdom, where retail sales had been decreasing for a number of years, a growth was noted (4.9 percent in 2015) for the fourth consecutive year.

In 2016, in many European countries, the market often experienced further double-digit growth: figures are expected to be available in the first months of 2017. On one hand, customers are becoming more conscious about their purchasing behaviours, and on the other hand, supermarket chains are driving the market by offering a wider variety of organic products.

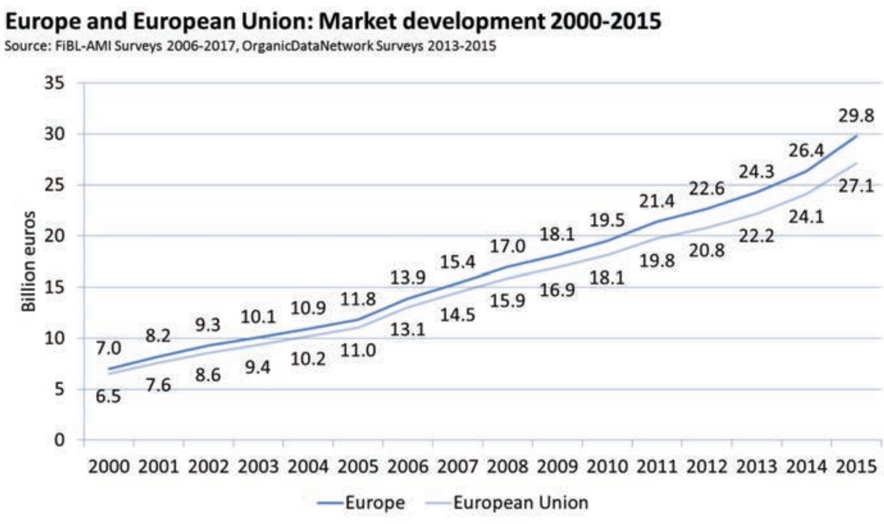

Figure 83: Europe: Growth of organic retail sales in Europe and the European Union, 2000-2015

Source: FiBL-AMI Surveys 2006-2017, and OrganicDataNetwork Surveys 2013-2015

[1] According to the Ekoweb report “Organic food market”, published in September 2016, Swedish organic food retail sales increased by 23 percent in the first half of 2016. The organic share is now 9 percent of the total retail sales value, according to Ekoweb.

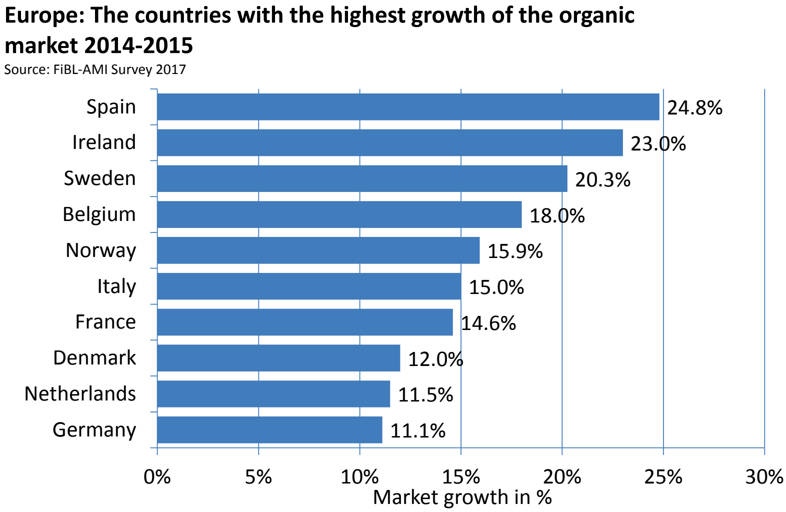

Figure 84: Europe: The countries with the highest growth of the organic market 2015
Source: FiBL-AMI Surveys 2017

6.3 Per capita consumption of organic food

Like in the previous years, the highest per capita consumption of organic food in 2015 was in Switzerland (262 euros), followed by Denmark (191 euros), Sweden (177 euros), and Luxembourg (170 euros) (Figure 85). The continual growth in consumer interest is well documented by the growth of per capita consumption, with a specific notable growth in 2015 (Figure 86). Seven countries had a per capita consumption of more than 100 euros in 2015 (Table 66).

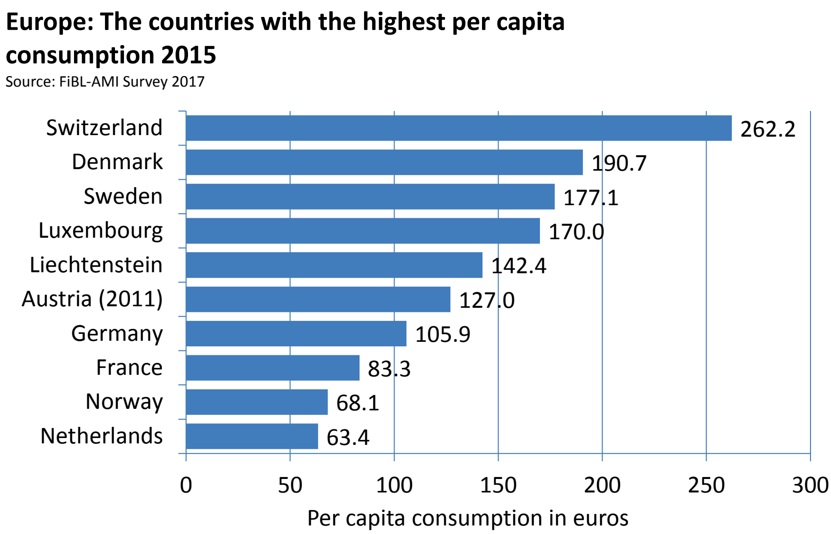

Figure 85: Europe: The countries with the highest per capita consumption 2015
Source: FiBL-AMI survey 2017 based on national data sources. For detailed data sources see annex.

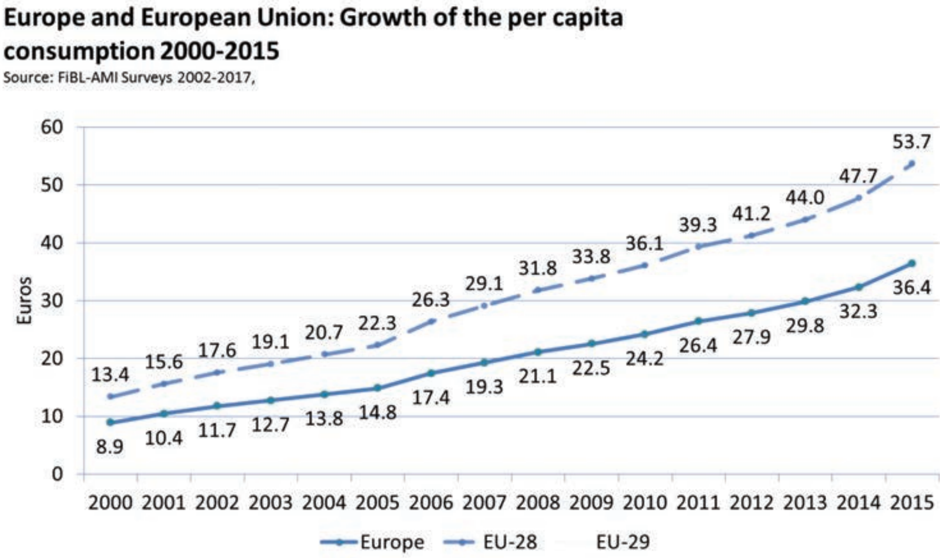

Figure 86: Europe: Growth of the per capita consumption 2000-2015

Source: FiBL-AMI survey 2017 based on national data sources. Calculation based on FAO population data. For detailed data sources see annex.

6.4 Organic market shares

The share that 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 (8.4 percent) and Switzerland (7.7 percent). Luxembourg provided revised data and now is in third place (Figure 87, Table 66). Some countries, such as Sweden and Denmark are expected to reach the ten percent share in the next two years or so (Figure 87, Table 66).

The fact that in many countries the total food market is not growing and that in many cases food prices are decreasing, makes organic shares grow even faster.

Market shares of individual products can be far higher; these data are provided in Table 60.

As there are no retail sales data for Europe or the EU as a whole, it is not possible to calculate overall organic market shares.

Willer, H. and Lernoud, J. (Eds.) (2017): The World of Organic Agriculture. Statistics and Emerging Trends. FiBL & IFOAM – Organics International (2017): Frick and Bonn, 2017-02-20

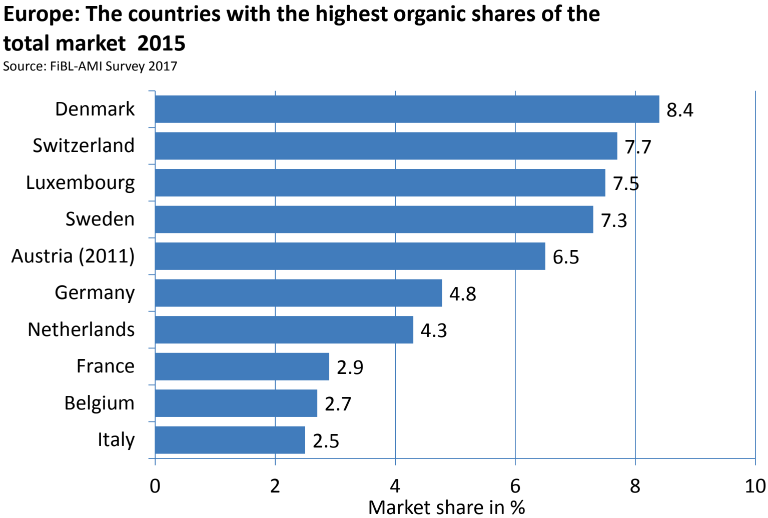

Figure 87: Europe: The countries with the highest shares of the total retail sales 2015

Source: FiBL-AMI survey 2016 based on national data sources
For detailed data sources see annex.

6.5 Comparison of organic products and product groups with the total market

In many countries, organic eggs are one of the success stories within the total retail market. Table 60 shows that Switzerland, Sweden, and France reach market shares (in value) of over 20 percent.

Organic fruit and vegetables continue to be highly popular purchases among European organic consumers. Organic vegetables have the highest market shares after eggs, representing between 9 percent and 18 percent of the sales value of all vegetables sold in Switzerland, Austria, Sweden, and Germany. Fresh carrots alone, for example, have a nearly 30 percent market share in Germany.

In some countries, organic dairy products can reach market shares of around 10 percent and higher of all dairy products in overall sales value. In Switzerland, they even reach 12 percent.

Individual products can reach much higher market shares. Organic baby food (over 40 percent in Germany) or organic meat substitutes (60 percent in Germany) are good examples.

On the other hand, products like organic beverages (with the exception of wine) and meat (especially poultry), in many countries, have low market shares. Often, these products are highly processed and/or very cheap on the conventional market. Therefore, especially in the meat sector, organic surpluses can occur. Another factor is that many organic consumers tend to eat little or no meat.

Table 60: Europe: Value shares of organic products and product groups of their respective total markets for selected countries 2015

Product group	Austria	Belgium	Czech Republic[1]	Finland	France[2]	Germany	Italy	Netherlands	Norway	Sweden	Switzerland	United Kingdom
All Beverages					3.0[3]	1.7			0.2	5.0[4]	2.9	
- Fruit drinks and juices					5.9		6.3			4.6		
- Grape wine		0.9			6.0							
All Bread and bakery products		1.9		1.0	2.5			1.3	1.1[5]	3.4	4.5[6]	
- Bread						6.8			0.2	2.0	20.1	
Fruit	10.7	3.9	0.7		4.3	7.4			1.9	18.3	11.1	2.0
Vegetables	13.4	6.0		3.0[7]	4.0	9.2		4.9[8]	3.8	12.5	18.6	
All meat and meat products		1.8		<1.0	1.6	2.5		2.8	0.3	2.9	5.0[9]	
- Meat products/ sausages	2.7				0.5	2.2				2.0		
Fish and fish products		1.3			1.1			1.4	0.2	12.5		
All milk and dairy products	9.9	2.7	0.9		3.2	8.6		3.8	1.8	9.9[10]	11.8	
- Butter	9.3	4.1			5.0	4.8			2.9	8.4		
- Cheese	8.4	2.0			1.2	4.1			0.5	2.2	6.8	
- Milk	17.3	3.0	1.4	3.0	10.8	10.6			4.2	18.6	20.4	5.6
- Yoghurt	11.4[11]	7.2			3.0	7.3	7.8		0.1	12.4	15.7	8.3
Eggs	18.5	10.6		13.0	22.1	19.5	14.6	13.2	8.0	23.9	24.3	6.4

Sources: Austria: AMA Marketing, Belgium: LF based on GFK; Czech Republic: UZEI and experts' estimates; Finland: Pro Luomu; France: Agence Bio; Germany: Agricultural Market Information Company based on GfK; Italy: AssoBio based on Nielsen; Netherlands: Bionext; Norway: Nielsen Norway; Sweden: Statistics Sweden; Switzerland: Bio Suisse; UK: Soil Association.

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 market shares of organic products. Please note that groups are not complete; the products shown in the table above are a selection.

[1] The data is from 2014.
[2] Most data is from 2014, some earlier.
[3] Vegetable drinks, fruit and vegetable juices, wine and alcohol.
[4] Excludes alcoholic beverages.
[5] Includes groats, flower, bread, crisp bread, pasta, rice, breakfast cereals, other cereal products.
[6] Bread and bakery products other than fresh bread.
[7] Includes fruit.
[8] Vegetables and fruit.
[9] Includes fish and fish products.
[10] Excludes eggs.
[11] Fruit yoghurt.

6.6 Marketing channels in organic agriculture

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, and some countries provide data for direct marketing and box schemes. Wherever possible, the figure for the catering sales was deducted from the figure for the total organic market (Table 66).

Figure 88 shows that the importance of the various marketing channels differs from country to country. In the past, countries with strong involvement by general retailers showed steady growth of their organic markets (e.g. Austria, Denmark, Switzerland, and the 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 the market continued to grow in specialized channels. France, Italy, and Germany are good examples of countries with strong market growth, where specialized retailers play a very important role. In Germany, though, the market has entered into a transition period. Supermarkets have become the driving force in the market, whereas specialised retailers are facing more and more competition (Figure 88).

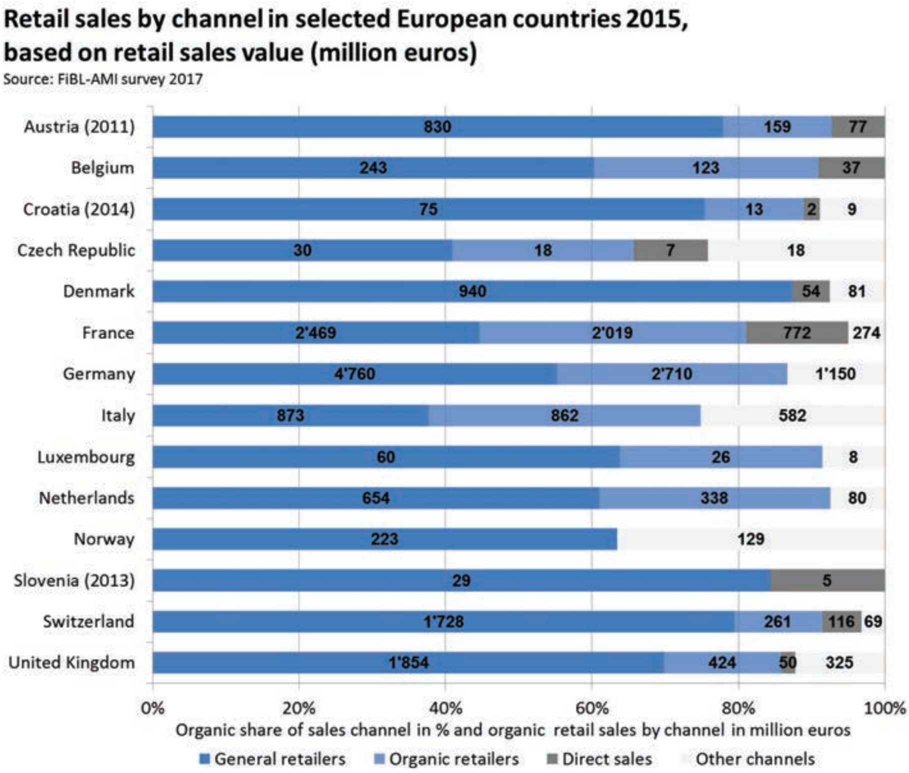

Figure 88: Europe: Marketing channels for organic products in selected countries 2015

Source: FiBL-AMI survey 2016 based on national data sources
For detailed data sources see annex.

7 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 the European market has.

For many countries, the market is growing faster than production, and domestic supply cannot meet demand. Therefore, many organic organisations or market actors are calling for more farmers to convert to organic.

The data analysis provided in this report shows that there are still large discrepancies among European countries. Even though some countries in Central Eastern Europe have reached high shares of organic agricultural land, consumer spending, although growing, remains low as a proportion of total spending on food in these countries.

Another issue that needs to be solved is data availability. For instance, imports and exports play a very important role in trade within the European Union and with external partners, but almost no relevant 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. While the OrganicDataNetwork online database improves the availability and accessibility of organic market data, it also clearly shows the current shortcomings. 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 2014).

8 Acknowledgements

The data compiled for this article builds on the collection activities of the OrganicDataNetwork project, which was funded by the European Union (EU) under its seventh framework programme for research, demonstration and technological development and ended in 2014.[1] Under this project, for the first time, detailed organic market data for all European countries was collected[2] and stored in one single database, which is available online.[3] In order to present these data, the statistical report for Europe is more comprehensive than for the other continents. 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.

[1] 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.

[2] 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.

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

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Organic Agriculture in Europe: Tables[1]

Table 61: Europe: Organic agricultural land by country 2015

Country	Organic area [ha]	Organic share [%]	Increase 2014-2015	Increase 2000-2015
Albania	515	0.04%	-	-
Andorra	2	0.01%	+100.0%	-
Austria	553'570	21.3%	-0.5%	+11.6%
Belarus		Wild collection only		
Belgium	68'818	5.2%	-3.1%	+233.0%
Bosnia and Herzegovina	576	0.03%	-38.7%	-
Bulgaria	118'552	3.9%	-37.3%	+41'351.7%
Channel Islands	180	1.9%	-	-
Croatia	75'883	5.0%	-34.0%	+583'615.4%
Cyprus	4'699	4.3%	-17.3%	+8'936.5%
Czech Republic	478'033	11.3%	-1.1%	+188.5%
Denmark	166'788	6.3%	-0.6%	+5.8%
Estonia	155'806	16.5%	-0.2%	+1'478.3%
Faroe Islands	253	8.4%	-0.1%	-
Finland	225'235	10.0%	-5.6%	+52.8%
France	1'375'328	5.0%	-18.6%	+271.8%
Germany	1'088'838	6.5%	-3.8%	+99.4%
Greece	407'069	5.0%	-10.9%	+1'424.2%
Hungary	129'735	2.4%	-3.8%	+174.7%
Iceland	9'797	0.5%	+14.1%	+188.1%
Ireland	73'037	1.8%	-29.0%	+168.2%
Italy	1'492'579	11.7%	-7.0%	+43.5%
Kosovo	160	0.04%	-28.7%	-
Latvia	231'608	12.8%	-12.2%	+5'163.8%
Liechtenstein	1'107	30.2%	+2.5%	+60.4%
Lithuania	213'579	7.4%	-23.0%	+4'435.5%
Luxembourg	4'216	3.2%	+6.5%	+294.8%
Macedonia, FYROM	2'174	0.2%	+44.7%	-
Malta	30	0.3%	+11.9%	-
Moldova	28'729	1.2%	-23.1%	+4'688.1%
Montenegro	3'289	1.4%	-	-
Netherlands	49'273	2.6%	-0.2%	+52.4%
Norway	47'640	4.4%	+4.6%	+132.0%
Poland	580'731	3.8%	+13.3%	+2'539.7%
Portugal	241'375	7.2%	-12.0%	+382.7%
Romania	245'924	1.8%	+17.6%	+1'314.3%
Russian Federation	385'140	0.2%	-36.2%	+3'805.7%
San Marino		Processing only		
Serbia	15'298	0.4%	-37.6%	-
Slovakia	181'882	9.6%	-0.9%	+211.1%
Slovenia	42'188	9.1%	-2.3%	+711.3%
Spain	1'968'570	7.9%	-13.1%	+416.8%
Sweden	518'983	16.9%	-3.3%	+197.9%
Switzerland	137'234	13.1%	-2.4%	+65.9%
Turkey	486'069	1.3%	+1.2%	+714.9%
Ukraine	410'550	1.0%	-2.4%	-
United Kingdom	495'929	2.9%	+5.2%	-14.3%
European Union	**11'188'258**	**6.2%**	**+7.8%**	**+155.2%**
Europe	**12'716'969**	**2.5%**	**+8.2%**	**+177.6%**

Source: FiBL-AMI survey 2017 based on Eurostat and national data sources. For data sources see annex.

[1] Note on European tables: Blank cells: No data available. Corrections, revisions and updates should be sent to helga.willer@fibl.org. Corrections and revisions will be posted at www.organic-world.net

Table 62: Europe: Conversion status of organic agricultural land 2015

Country	Total organic area [ha]	Area under conversion [ha]	Area fully converted [ha]
Albania	515		
Andorra	2		2
Austria	553'570		
Belarus		Wild collection only	
Belgium	68'818	11'655	57'163
Bosnia and Herzegovina	576	105	470
Bulgaria	118'552	97'021	21'539
Channel Islands	180		180
Croatia	75'883	50'085	25'796
Cyprus	4'699	1'439	3'257
Czech Republic	478'033	49'471	428'561
Denmark	166'788	16'466	150'321
Estonia	155'806	23'118	132'684
Faroe Islands	253	253	
Finland	225'235	33'075	192'160
France	1'375'328	312'406	1'063'172
Germany	1'088'838		
Greece	407'069	21'679	385'404
Hungary	129'735	35'573	94'163
Iceland	9'797		
Ireland	73'037	25'085	47'947
Italy	1'492'579	398'933	1'093'646
Kosovo	160		160
Latvia	231'608	70'644	160'966
Liechtenstein	1'107	3	1'105
Lithuania	213'579	82'123	131'454
Luxembourg	4'216	426	3'791
Macedonia, FYROM	2'174	982	1'192
Malta	30	3	25
Moldova	28'729	526	18'052
Monaco		Processing only	
Montenegro	3'289		
Netherlands	49'273	3'303	45'970
Norway	47'640	3'323	44'317
Poland	580'731	78'809	501'924
Portugal	241'375	84'967	156'408
Romania	245'924	70'353	175'571
Russian Federation	385'140	38'823	165'447
Serbia	15'298	7'672	7'628
Slovakia	181'882	42'648	139'234
Slovenia	42'188	9'702	32'488
Spain	1'968'570	558'041	1'410'549
Sweden	518'983	52'537	466'446
Switzerland	137'234		
Turkey	486'069	166'205	319'864
Ukraine	410'550		
United Kingdom	495'929	19'786	476'142
European Union	**11'188'258**	**2'149'348**	**7'396'781**
Europe	**12'716'969**	**2'367'239**	**7'955'197**

Source: FiBL-AMI survey 2017 based on Eurostat and national data sources. For data sources see annex.

Table 63: Europe: Land use and in organic agriculture by country 2015

Country	Arable crops [ha]	Permanent crops [ha]	Permanent grassland [ha]	Other [ha]	Total [ha]
Albania	93	420		2	515
Andorra		2			2
Austria	194'332	8'068	350'309	861	553'570
Belarus			Wild collection only		
Belgium	21'749	753	46'318	-2	68'818
Bosnia and Herzegovina	127	52	36	361	576
Bulgaria	60'826	25'930	31'796		118'552
Channel Islands				180	180
Croatia	34'306	7'963	33'612	2	75'883
Cyprus	2'097	2'249	352	1	4'699
Czech Republic	65'490	6'473	406'070		478'033
Denmark	132'002	3'389	31'396	1	166'788
Estonia	71'317	1'805	82'684		155'806
Faroe Islands			253		253
Finland	220'907	527	3'801		225'235
France	717'122	99'731	506'121	52'354	1'375'328
Germany	430'742	34'012	600'000	24'084	1'088'838
Greece	98'029	56'475	252'565		407'069
Hungary	59'070	5'923	64'742		129'735
Iceland	713	20	7'722	1'342	9'797
Ireland	4'569	59	68'409		73'037
Italy	702'541	363'834	426'204		1'492'579
Kosovo	160				160
Latvia	124'596	1'311	105'701		231'608
Liechtenstein	252	7	848		1'107
Lithuania	143'445	6'525	63'608	1	213'579
Luxembourg	1'870	122	2'223	1	4'216
Macedonia, FYROM	1'755	269		150	2'174
Malta	10	19	0	1	30
Moldova	25'400	2'016	1'042	270	28'729
Monaco			Processing only		
Montenegro	212	208	2'868	1	3'289
Netherlands	20'495	335	28'443		49'273
Norway	38'585	267	8'788		47'640
Poland	376'938	45'808	157'985		580'731
Portugal	36'609	37'032	167'757	-23	241'375
Romania	158'975	11'094	75'854	1	245'924
Russian Federation	169'620	304	2'103	213'112	385'139
Serbia	10'685	2'712	1'900	1	15'298
Slovakia	59'973	1'649	120'260		181'882
Slovenia	5'360	2'175	34'653		42'188
Spain	452'291	501'900	1'014'379		1'968'570
Sweden	398'001	475	120'507		518'983
Switzerland	25'536	1'627	107'165	2'906	137'234
Turkey	314'987	153'715	17'767	-401	486'069
Ukraine	335'170	6'130	51'000	18'250	410'550
United Kingdom	144'801	3'755	347'373		495'929
European Union	**4'738'463**	**1'229'390**	**5'143'122**	**77'283**	**11'188'258**
Europe	**5'661'759**	**1'397'140**	**5'344'614**	**313'457**	**12'716'969**

Source: FiBL-AMI survey 2017 based on Eurostat and national data sources. For data sources see annex.

Willer, H. and Lernoud, J. (Eds.) (2017): The World of Organic Agriculture. Statistics and Emerging Trends. FiBL & IFOAM – Organics International (2017): Frick and Bonn, 2017-02-20

Table 64: Europe: Organic agricultural land and wild collection areas by country 2015

Country	Agricultural land [ha]	Wild collection [ha]	Total [ha]
Albania	515	467'783	468'298
Andorra	2		2
Austria	553'570		553'570
Belarus		2'742	2'742
Belgium	68'818	3	68'821
Bosnia and Herzegovina	576	50'250	50'826
Bulgaria	118'552	901'617	1'020'169
Channel Islands	180		180
Croatia	75'883	8	75'891
Cyprus	4'699		4'699
Czech Republic	478'033		478'033
Denmark	166'788	2'648	169'436
Estonia	155'806	40'579	196'385
Faroe Islands	253		253
Finland	225'235	12'200'000	12'425'235
France	1'375'328		1'375'328
Germany	1'088'838		1'088'838
Greece	407'069	317'053	724'122
Hungary	129'735		129'735
Iceland	9'797	212'699	222'496
Ireland	73'037		73'037
Italy	1'492'579	70'254	1'562'833
Kosovo	160	179'580	179'740
Latvia	231'608		231'608
Liechtenstein	1'107		1'107
Lithuania	213'579		213'579
Luxembourg	4'216		4'216
Macedonia, FYROM	2'174	556'600	558'774
Malta	30		30
Moldova	28'729		28'729
Monaco		Processing only	
Montenegro	3'289	139'809	143'097
Netherlands	49'273		49'273
Norway	47'640		47'640
Poland	580'731		580'731
Portugal	241'375	40'000	281'375
Romania	245'924	1'787'548	2'033'472
Russian Federation	385'139	35'383	420'522
Serbia	15'298	1'550	16'848
Slovakia	181'882		181'882
Slovenia	42'188	13'238	55'426
Spain	1'968'570	38'184	2'006'754
Sweden	518'983		518'983
Switzerland	137'234		137'234
Turkey	486'069	61'230	547'299
Ukraine	410'550	540'000	950'550
United Kingdom	495'929		495'929
European Union	**11'188'258**	**15'411'132**	**26'618'923**
Europe	**12'716'969**	**17'658'757**	**30'375'726**

Source: FiBL-AMI survey 2017, based on Eurostat and national data sources. For data sources see annex.

Table 65: Europe: Organic producers, processors and importers by country 2015

	Producers			Processors		Importers		Exporters	
Country	No.	Change 2014-2015	Change 2006-2015	No.	Change 2014-2015	No.	Change 2014-2015	No.	Change 2014-2015
Albania	39	-	30%	22	-	4	-	25	-
Andorra		-	-	3	200%		-		-
Austria	20'976	0.5%	4%	2'198	4%	29	26%	8	-11%
Belarus		-	-	1	-		-	1	-
Belgium	1'733	5%	116%	1'014	14%	164	16%	37	-
Bosnia and Herzegovina	36	50%	-89%	8	-		-	10	67%
Bulgaria	5'919	52%	2615%	161	22%	8	167%	9	-25%
Croatia	3'061	40%	732%	320	35%	4	-33%	6	-
Cyprus	1'032	39%	238%	62	22%	3	-25%	3	-25%
Czech Republic	4'121	7%	328%	558	10%	139	26%	70	30%
Denmark	2'991	17%	7%	908	15%	78	15%	80	7%
Estonia	1'629	6%	39%	118	8%	16	78%		-
Faroe Islands	1	-	-	1	-		-		-
Finland	4'328	2%	9%	453	-33%	79	-29%	13	-
France	28'884	9%	148%	11'842	6%	273	84%		-
Germany	25'078	6%	43%	14'280	23%	1'452	28%	775	77%
Greece	19'604	-3%	-18%	1'526	-7%	14	100%	42	56%
Hungary	1'971	18%	27%	235	-9%	21	31%		-
Iceland	36	6%	50%	29	12%	3	50%		-
Ireland	1'709	34%	60%	254	5%	10	-	6	100%
Italy	52'609	8%	17%	14'658	16%	310	20%	621	-
Kosovo	100	900%	-	5	-50%		-		-75%
Latvia	3'634	4%	-11%	75	50%	10	67%		0%
Liechtenstein	38	-3%	-7%		-		-		-
Lithuania	2'672	9%	14%	74	10%	8	60%		-
Luxembourg	83	5%	15%	79	10%	6	20%		-
Macedonia, FYROM	460	39%	351%	15	36%		-	6	-
Malta	11	10%	10%	7	-13%	12	9%		-
Moldova	50	-71%	-59%	11	-		-	9	-
Monaco		-	-		-		-		-
Montenegro	167	-	1013%	9	-		-		-
Netherlands	1'472	1%	2%	990	-1%	314	14%	73	4%
Norway	2'113	-5%	-18%	358	-27%	74	14%	2	-
Poland	22'277	-10%	142%	562	16%	92	35%	107	51%
Portugal	4'142	24%	167%	604	12%	2	-		-
Romania	11'869	-16%	291%	139	12%	3	-		100%
Russian Federation	82	21%	925%	37	3%		-	11	450%
San Marino		-	-	2	-		-		-
Serbia	264	23%	654%	37	-16%	30	7%	3	200%
Slovakia	420	4%	58%	48	-14%	11	-15%		-100%
Slovenia	3'412	4%	75%	279	18%	12	9%		-
Spain	34'673	13%	101%	3'436	11%	166	31%	72	7%
Sweden	5'709	6%	140%	855	-	201	-19%	32	-
Switzerland	6'244	1%	-1%		-		-%		-
Turkey	69'967	-2%	391%	1'064	27%	44	29%	42	14%
Ukraine	210	15%	163%	110	86%	50	-17%	30	-45%
United Kingdom	3'434	-3%	-26%	2'625	6%	37	-58%		-
European Union	269'453	5%	50%	58'360	12%	3'474	19%		-100%
Europe	349'261	3%	71%	60'073	12%	3'681	19%	2'100	107%

Source: FiBL-AMI survey 2017 based on Eurostat and national data sources. For data sources see annex.

Willer, H. and Lernoud, J. (Eds.) (2017): The World of Organic Agriculture. Statistics and Emerging Trends. FiBL & IFOAM – Organics International (2017): Frick and Bonn, 2017-02-20

Table 66: Europe: The market for organic food 2015

Country	Retail sales [Million €]	€/person	Organic share [%]	Growth in sales 2014-15 [%]	Exports [Million €]	Catering [Million €]
Austria (2011)	1'065	127.0	6.5%		80	64
Belgium	514	45.7	2.7%	18.0%		
Bosnia and Herzegovina	0.31	0.03			2	
Bulgaria (2010)	7	0.9				
Croatia (2014)	99	23.4	2.2%		3 (2011)	
Cyprus (2006)	2	1.9				
Czech Republic (2014)	74	7.0	0.7%		43	
Denmark	1'079	190.7	8.4%	12.0%	266	223
Finland	240	43.9	1.8%	6.7%	10 (2014)	
France	5'534	83.3	2.9%	14.6%	435	225
Germany	8'620	105.9	4.8%	11.1%		
Greece (2010)	60	5.3				
Hungary	30	3.0			20 (2009)	
Ireland	142	30.7	0.7%	23.0%		
Italy	2'317	38.1	2.8%	15.0%	1'650	343
Kosovo					6	
Latvia (2011)	4	2.0	0.8%			
Liechtenstein	6	142.4				
Lithuania (2011)	6	2.0	0.2%			
Luxembourg	94	170.0	7.5%	4.0%		
Moldova					15 (2011)	
Montenegro	0.10 (2010)	0.2				
Netherlands	1'072	63.4	4.3%	11.5%	928 (2014)	200
Norway	352	68.1	1.5%	15.9%		
Poland	167	4.4				
Portugal (2011)	21	2.0	0.2%			
Romania (2011)	80	3.7	0.7%		200	
Russian Federation	120 (2012)	0.8			4 (2009)	
Serbia					20	
Slovakia (2010)	4	0.7	0.2%			
Slovenia (2013)	49	26.6	1.8%		0.1 (2009)	0.1 (2009)
Spain	1'498	32.3	1.5%	24.8%	778	
Sweden	1'726	177.1	7.3%	20.2%		
Switzerland	2'175	262.2	7.7%	5.2%		
Turkey (2009)	4	0.1			62 (2015)	
Ukraine	18	2.6			50	
United Kingdom	2'604	40.2	1.4%	4.9%		89
European Union	**27'107**	**53.7**		**12.6%**		
Europe	**29'781**	**36.4**		**13.0%**		

Source: FiBL-AMI survey 2017. For details on data sources see annex.

Note on table: Where no published data exists, best estimates from a range of experts he 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 2015 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.

Table 67: Europe: Key indicators by country group 2015

	Country	Organic area [ha]	Organic share [%]	Producers [no.]	Retail sales [Million €]	€/person	Retail sales: Share [%]
EU-15	Austria	553'570	21.3%	20'976	1'065	127.0	6.5%
	Belgium	68'818	5.2%	1'733	514	45.7	2.7%
	Denmark	166'788	6.3%	2'991	1'079	190.7	8.4%
	Finland	225'235	10.0%	4'328	240	43.9	1.8%
	France	1'375'328	5.0%	28'884	5'534	83.3	2.9%
	Germany	1'088'838	6.5%	25'078	8'620	105.9	4.8%
	Greece	407'069	5.0%	19'604	60	5.3	
	Ireland	73'037	1.8%	1'709	142	30.7	0.7%
	Italy	1'492'579	11.7%	52'609	2'317	38.1	2.5%
	Luxembourg	4'216	3.2%	83	94	170.0	7.5%
	Netherlands	49'273	2.6%	1'472	1'072	63.4	4.3%
	Portugal	241'375	7.2%	4'142	21	2.0	0.2%
	Spain	1'968'570	7.9%	34'673	1'498	32.3	1.5%
	Sweden	518'983	16.9%	5'709	1'726	177.1	7.3%
	United Kingdom	495'929	2.9%	3'434	2'604	40.2	1.4%
EU-15 total		8'729'608	6.8%	207'425	26'586	65.9	-
EU-13	Bulgaria	118'552	3.9%	5'919	7	0.9	
	Croatia	75'883	5.0%	3'061	99	23.4	2.2%
	Cyprus	4'699	4.3%	1'032	2	1.9	
	Czech Republic	478'033	11.3%	4'121	74	7.0	0.7%
	Estonia	155'806	16.5%	1'629			
	Hungary	129'735	2.4%	1'971	30	3.0	
	Latvia	231'608	12.8%	3'634	4	2.0	0.2%
	Lithuania	213'579	7.4%	2'672	6	2.0	0.2%
	Malta	30	0.3%	11			
	Poland	580'731	3.8%	22'277	167	4.4	
	Romania	245'924	1.8%	11'869	80	3.7	0.7%
	Slovakia	181'882	9.6%	420	4	0.7	0.2%
	Slovenia	42'188	9.1%	3'412	49	26.6	1.8%
EU-13 total		2'458'650	4.8%	62'028	521	5.0	-
CPC	Albania	515	0.04%	39			
	Bosnia and Herzegovina	576	0.03%	36	0.3	0.03	
	Kosovo	160	0.04%	100			
	Montenegro	3'289	1.4%	167	0.1	0.2	
	Macedonia	2'174	0.2%	460			

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	Country	Organic area [ha]	Organic share [%]	Producers [no.]	Retail sales [Million €]	€/person	Retail sales: Share [%]
	(FYROM)						
	Serbia	15'298	0.4%	264			
	Turkey	486'069	1.3%	69'967	4	0.1	
CPC total		508'080	1.1%	71'033	4	0.2	-
EFTA	Iceland	9'797	0.5%	36			
	Liechtenstein	1'107	30.2%	38	6	142.4	
	Norway	47'640	4.4%	2'113	352	68.1	1.5%
	Switzerland	137'234	13.1%	6'244	2'175	262.2	7.7%
EFTA total		195'778	4.9%	8'431	2'533	183.9	-
Other European countries	Andorra	2	0.01%	1			
	Belarus			Wild collection only			
	Channel Islands	180	1.9%				
	Faroe Islands	253	8.4%	1			
	Moldova	28'729	1.2%	50			
	Russian Federation	385'140	0.2%	82	120	0.8	
	San Marino			Processing only			
	Ukraine	410'550	1.0%	210	18	2.6	
Other European countries total		824'853	0.3%	344	138	0.6	-
European Union total		**11'188'258**	**6.2%**	**269'453**	**27'107**	**53.7**	**-**
Europe total		**12'716'969**	**2.5%**	**349'261**	**29'781**	**36.4**	**-**

Source: FiBL-AMI survey 2017. For details on data sources see annex on page 316.