Development of organic agriculture and markets worldwide and in Europe

Helga Willer, FiBL, Frick, Switzerland

Tallin, May 4, 2018
Contents

• FiBL
• Development of organic farming in the world (generally) and more specifically in Europe.
• Development of organic market in Europe: How is the market expanding and what are the main market trends (food groups, marketing channels etc).
• Focus on Germany, France, UK, Switzerland and Sweden? What is the market situation there?
FiBL Switzerland at a glance

Founded in 1973, private foundation
190 staff members
70 interns, B.A./Master/PhD students, apprentices
Research on over 200 Swiss organic farms
FiBL sites

1. FiBL Europe
2. FiBL Switzerland
3. FiBL Germany
4. FiBL Austria
5. FiBL Team France
6. FiBL Central Eastern Europe (ÖMKi Hungary)

www.fibl.org

- Data tables and graphs
- Country and continent reports
- Articles about the global market, standards, policy support

www.organic-world.net

https://Statistics.FiBL.org

Acknowledgements: The World of Organic Agriculture

The Swiss State Secretariat of Economic Affairs SECO, Berne

International Trade Centre ITC

Nürnberg Messe, the organizers of the BioFach World Organic Trade Fair

IFOAM – Organics International

200 experts from all parts of the world contributed to the FiBL survey 2018.
The World of Organic Agriculture 2016

Organic Farmland 2016:
- North America: 3.1 m ha
- Europe: 13.5 m ha
- Asia: 4.9 m ha
- Latin America: 7.1 m ha
- Africa: 1.8 m ha
- Oceania: 27.3 m ha

Organic Producers 2016:
The number of organic producers is increasing
- 2.7 million Organic farmers

Organic Market 2016:
The global market is growing and consumer demand is increasing
- More than 80 bn €

Organic farmland in million hectares:
- 57.8 m ha

Countries with organic farming:
- 178

From 2015:
- +12.8%
- +15%

Top 3 countries (land in million of hectares):
- Australia: 27.1
- Argentina: 3.0
- China: 2.3

Number of producers: Top 3 countries:
- India: 835'000
- Uganda: 210'352
- Mexico: 210'000

Top 3 countries (market in billion euros):
- USA: 38.9
- Germany: 9.5
- France: 6.7

21.8% Organic market growth
9.7% Market share
274 € Highest per capita spending is in Switzerland

Source: FiBL survey based on national sources © FiBL 2018
More information: www.organic-world.net
Another record year - highlights 2016

• Organic agricultural land reached an all time high with 57.8 million hectares
• Largest area growth so far: 7.5 million hectares more than in 2015; in all continents the organic area increased
• 1.2 percent of the agricultural land is organic; in 15 countries 10 percent or more of the farmland is organic
• 2.7 million producers were reported – another all time high
• Organic retail sales reached 85 billion euros
Organic area: Top ten countries

The ten countries with the largest areas of organic agricultural land 2016
Source: FiBL survey 2018

<table>
<thead>
<tr>
<th>Country</th>
<th>Organic area (Million hectares)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>27.15</td>
</tr>
<tr>
<td>Argentina</td>
<td>3.01</td>
</tr>
<tr>
<td>China</td>
<td>2.28</td>
</tr>
<tr>
<td>United States of America</td>
<td>2.03</td>
</tr>
<tr>
<td>Spain</td>
<td>2.02</td>
</tr>
<tr>
<td>Italy</td>
<td>1.80</td>
</tr>
<tr>
<td>Uruguay</td>
<td>1.66</td>
</tr>
<tr>
<td>France</td>
<td>1.54</td>
</tr>
<tr>
<td>India</td>
<td>1.49</td>
</tr>
<tr>
<td>Germany</td>
<td>1.25</td>
</tr>
</tbody>
</table>
The countries with the highest organic shares of agricultural land 2016

Countries with an organic area share of at least 10 percent 2016
Source: FiBL survey 2018

- Liechtenstein: 37.7%
- French Polynesia: 31.3%
- Samoa: 22.4%
- Austria: 21.9%
- Estonia: 18.9%
- Sweden: 18.0%
- Italy: 14.5%
- Latvia: 14.3%
- Sao Tome and Principe: 13.8%
- Switzerland: 13.5%
- Falkland Islands (Malvinas): 12.2%
- Czech Republic: 11.5%
- Uruguay: 11.5%
- Finland: 10.4%
- French Guiana (France): 10.0%
World: Growth of the organic farmland and organic share 1999-2016

Growth of the organic agricultural land and organic share 1999-2016
Source: FiBL-IFOAM-SOIL-Surveys 1999-2018

Plus 15%
2015/2016
World: Growth of organic farmland by continent 2016

Growth of the organic agricultural land by continent 2008-2016
Source: FiBL-IFOAM survey 2008-2018

Million hectares

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa</td>
<td>0.9</td>
<td>1.1</td>
<td>1.3</td>
<td>1.8</td>
<td>1.8</td>
</tr>
<tr>
<td>Asia</td>
<td>3.4</td>
<td>2.5</td>
<td>3.2</td>
<td>3.6</td>
<td>6.9</td>
</tr>
<tr>
<td>Europe</td>
<td>4.9</td>
<td>8.3</td>
<td>10.0</td>
<td>11.2</td>
<td>11.8</td>
</tr>
<tr>
<td>Latin America</td>
<td>7.2</td>
<td>7.5</td>
<td>6.9</td>
<td>6.8</td>
<td>7.1</td>
</tr>
<tr>
<td>North America</td>
<td>2.6</td>
<td>2.5</td>
<td>3.0</td>
<td>2.5</td>
<td>3.1</td>
</tr>
<tr>
<td>Oceania</td>
<td>12.1</td>
<td>12.1</td>
<td>12.2</td>
<td>12.2</td>
<td>27.3</td>
</tr>
</tbody>
</table>

www.fibl.org
The country with the most organic producers is India, followed by Uganda and Mexico. More than 84% of the producers are in Asia, Africa, and Latin America. The five countries with the largest numbers of organic producers 2016:

- India
- Uganda
- Mexico
- Ethiopia
- Philippines

Distribution of organic producers by region 2016:

- Asia
- North America
- Europe
- Oceania
- Latin America

There has been an increase in the number of producers by more than 300,000, or over 13% since 2015.

Development of the number of organic producers 1999-2016:

Source: FiBL survey 2018  www.organic-world.net
The largest single market is the USA followed by the EU (30.7 billion €) and China. By region, North America has the lead (41.9 billion €), followed by Europe (33.5 billion €) and Asia.

The countries with the largest market for organic food are the United States (38.9 billion €), followed by Germany (9.5 billion €), France (6.7 billion €) and China (5.9 billion €).

Switzerland has the highest per capita consumption worldwide, followed by Denmark and Sweden.

The highest shares the organic market of the total market is in Denmark, followed by Luxembourg, Switzerland, Sweden, and Austria.
Trend: The organic market continues to grow at double digit rates

Development of organic retail sales 1999-2016
Source: FiBL surveys 2002-2018
Please note that for the years prior to 2005 data may not be complete
Area continues to grow at a slower pace than retail sales: Supply with raw materials remains a big topic for processors

Europe: Cumulative growth of organic area and retail sales 2000-2016 compared
Source: FiBL-AMI surveys 2006-2018
The United States has the largest organic market worldwide, more than 39 billion euros, representing 47% of the global organic market.
World: Global market: Distribution of retail sales by single market 2016

Source: FiBL-AMI survey 2018

- USA: 47%
- EU-28: 36%
- China: 6%
- Canada: 4%
- Switzerland: 3%
- Other: 4%
World: Distribution of organic retail sales 2016
(Yellow: European countries)

Global market: Distribution of retail sales value by country 2016
Source: FiBL-AMI survey 2018, based on retail sales with organic food

- USA: 46%
- Germany: 11%
- France: 8%
- China: 7%
- Canada: 4%
- Italy: 3%
- Switzerland: 3%
- Other: 15%

Global market: Distribution of retail sales value by region 2016
Source: FiBL-AMI survey 2018, based on retail sales with organic food

- North America: 50%
- Europe: 40%
- Asia: 9%
- Latin America: 1%
- Oceania: 0.1%

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European consumers spend more on organic food

Europe and European Union: Growth of the per capita consumption 2000-2016


www.fibl.org
European consumers spend more on organic food than consumers in other parts of the world
(Yellow: Europe)

The ten countries with the highest per capita consumption 2016
Source: FiBL-AMI survey 2018

<table>
<thead>
<tr>
<th>Country</th>
<th>Per capita consumption in euros</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switzerland</td>
<td>274</td>
</tr>
<tr>
<td>Denmark</td>
<td>227</td>
</tr>
<tr>
<td>Sweden</td>
<td>197</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>188</td>
</tr>
<tr>
<td>Austria</td>
<td>177</td>
</tr>
<tr>
<td>Liechtenstein</td>
<td>171</td>
</tr>
<tr>
<td>USA</td>
<td>121</td>
</tr>
<tr>
<td>Germany</td>
<td>116</td>
</tr>
<tr>
<td>France</td>
<td>101</td>
</tr>
<tr>
<td>Canada</td>
<td>83</td>
</tr>
</tbody>
</table>

Per capita consumption in euros

Source: FiBL-AMI survey 2018
Organic market shares reach the 10% mark

Europe: The countries with the highest organic shares of the total market 2016
Source: FiBL-AMI survey 2018

- Denmark: 10.5%
- Luxembourg: 8.6%
- Switzerland: 8.4%
- Austria: 7.9%
- Sweden: 7.9%
- Germany: 5.1%
- Netherlands: 4.4%
- France: 3.5%
- Belgium: 3.2%
- Italy: 3.0%

www.fibl.org
Europe: Organic market grows by 10 percent and more in many countries

Europe: The countries with the highest growth of the organic market 2015-2016
Source: FiBL-AMI survey 2018

- Ireland: 22%
- France: 22%
- Denmark: 20%
- Norway: 20%
- Liechtenstein: 15%
- Luxembourg: 15%
- Italy: 14%
- Finland: 14%
- Austria: 13%
- Spain: 13%

Market growth in %
General retailers are the most important marketing channel in most countries

<table>
<thead>
<tr>
<th>Country</th>
<th>General retailers (million euros)</th>
<th>Organic retailers (million euros)</th>
<th>Direct sales (million euros)</th>
<th>Other channels (million euros)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>1,230</td>
<td></td>
<td></td>
<td>312</td>
</tr>
<tr>
<td>Czech Republic (2015)</td>
<td>37</td>
<td>12</td>
<td>12</td>
<td>17</td>
</tr>
<tr>
<td>Denmark</td>
<td>1,070</td>
<td></td>
<td></td>
<td>80</td>
</tr>
<tr>
<td>France</td>
<td>3,024</td>
<td>2,497</td>
<td>889</td>
<td>326</td>
</tr>
<tr>
<td>Germany</td>
<td>5,455</td>
<td>2,848</td>
<td>1,175</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>1,119</td>
<td>892</td>
<td>633</td>
<td></td>
</tr>
<tr>
<td>Netherlands</td>
<td>735</td>
<td></td>
<td>336</td>
<td>100</td>
</tr>
<tr>
<td>Norway</td>
<td>267</td>
<td>51</td>
<td>121</td>
<td></td>
</tr>
<tr>
<td>Sweden</td>
<td>1,669</td>
<td></td>
<td>528</td>
<td></td>
</tr>
<tr>
<td>Switzerland</td>
<td>1,859</td>
<td></td>
<td>249</td>
<td>121</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>1,743</td>
<td></td>
<td>400</td>
<td>50</td>
</tr>
</tbody>
</table>

Retail sales by channel in selected European countries 2016, based on retail sales value (million euros)

Source: FiBL-AMI survey 2018
Germany: General retailers gain market shares

Germany: Development of organic retail sales by channel 2014-2017

Source: Arbeitskreis Biomarkt, AMI 2017

Billion Euros

<table>
<thead>
<tr>
<th>Year</th>
<th>General retailers</th>
<th>Specilized retailers</th>
<th>Other channels</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>4.2</td>
<td>2.5</td>
<td>1.1</td>
</tr>
<tr>
<td>2015</td>
<td>4.8</td>
<td>2.7</td>
<td>1.2</td>
</tr>
<tr>
<td>2016</td>
<td>5.5</td>
<td>2.8</td>
<td>1.2</td>
</tr>
<tr>
<td>2017</td>
<td>5.9</td>
<td>2.9</td>
<td>1.2</td>
</tr>
</tbody>
</table>
Fruit & vegetables and dairy products continue to be the most popular product groups

Source: FiBL Survey 2018, based on national data sources
Some products and product groups reach more than 10 percent of their respective totals (value in EUR)
(Green: highest organic share)

<table>
<thead>
<tr>
<th>Product</th>
<th>France</th>
<th>Germany</th>
<th>Sweden</th>
<th>Switzerland</th>
<th>UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beverages</td>
<td>4.2%</td>
<td>5.5%</td>
<td>3.2%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bread and bakery products</td>
<td>2.9%</td>
<td>7.7%</td>
<td>3.7%</td>
<td>20.7%</td>
<td>0.4%</td>
</tr>
<tr>
<td>Eggs</td>
<td>27.0%</td>
<td>19.4%</td>
<td>25.5%</td>
<td>6.8%</td>
<td></td>
</tr>
<tr>
<td>Fish and fish products</td>
<td>2.3%</td>
<td></td>
<td></td>
<td>0.7%</td>
<td></td>
</tr>
<tr>
<td>Fresh vegetables</td>
<td>5.4%</td>
<td>9.7%</td>
<td>12.2%</td>
<td>21.2%</td>
<td>4.3%</td>
</tr>
<tr>
<td>Fruit</td>
<td>6.6%</td>
<td>7.8%</td>
<td>19.6%</td>
<td>12.9%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Meat and meat products</td>
<td>2.0%</td>
<td>2.5%</td>
<td>3.2%</td>
<td>5.3%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Milk and dairy products</td>
<td>4.0%</td>
<td>11.0%</td>
<td>12.6%</td>
<td>3.8%</td>
<td></td>
</tr>
<tr>
<td>- Butter</td>
<td>6.3%</td>
<td>4.7%</td>
<td></td>
<td>2.0%</td>
<td></td>
</tr>
<tr>
<td>- Cheese</td>
<td>1.5%</td>
<td>4.4%</td>
<td>6.5%</td>
<td>1.1%</td>
<td></td>
</tr>
<tr>
<td>- Milk</td>
<td>12.5%</td>
<td>12.1%</td>
<td>16.4%</td>
<td>5.9%</td>
<td></td>
</tr>
<tr>
<td>Yoghurt</td>
<td>4.8%</td>
<td>7.7%</td>
<td></td>
<td>8.2%</td>
<td></td>
</tr>
</tbody>
</table>

Source: FiBL Survey 2018, based on national data sources
European countries are increasing their exports (but data are scarce/incomplete)

Export values
Source: FiBL-AMI survey 2018

- Italy: 1,915 million euros
- Netherlands: 1,200 million euros
- Spain: 891 million euros
- France: 629 million euros
- Denmark: 329 million euros
- Ukraine: 213 million euros
- Romania: 200 million euros
- Sweden: 84 million euros
- Austria: 80 million euros
- Turkey: 78 million euros
- Ukraine: 59 million euros
- Czech... 53 million euros

Exports in million euros
France

Source: Agence Bio

FR: Growth of the organic market and organic share 2004-2016
Source: Agence Bio
Mid-2017: organic farms

Source: Agence Bio 2018
France: Mid-2017 organic food sales

- More than 7 billion euros in 2016 (including restaurant trade)
- Increase of + 500 million euros in the first half of 2017 when compared to the same period in 2016
- Supermarkets: organic sales increase by 18% in the first half of 2017
- Specialist organic stores: +12% in the first half of 2017 when compared to the same period on 2016
- Organic fruits and vegetables are the main drivers

Source: Agence Bio 2018
Sales of organic food from 1999 to 2016 in France by category of distribution channel

Agence Bio/AND, 2016 Market assessment

Source: Agence Bio 2018
More consumers buy organic food

Some facts and figures on French consumers
(Source: Agence Bio)

Source: Agence BIO CSA research 2017
Consumers want a better availability of organic food

Les Français veulent plus de bio « partout »

90% des parents intéressés par une offre bio en RESTAURATION SCOLAIRE
83% RESTAURANTS
81% LIEUX DE TRAVAIL
80% HÔPITAUX
77% MAISONS DE RETRAITE
73% CENTRES DE VACANCES
70% RESTAURATION RAPIDE
56% DISTRIBUTION AUTOMATIQUE

Source: Agence Bio 2018
Denmark

**DK: Growth of the organic farm-land and organic share 2004-2016**
Source: Eurostat

**DK: Growth of the organic market and organic share 2004-2016**
Source: Statistics Denmark

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Denmark

- Exceptional market growth
- Exceptional growth of exports and imports
- Highest organic market share worldwide
Trend: Export and Imports on the increase

- Strong market growth in the past
- Organic market share higher than area share
- World leader in organic market share
- Organic products are becoming more and more important for public procurement (canteens, hospitals)
- Imports but also exports constantly on the increase

Danmark: Organic exports and imports 2003-2016
Source: Statistics Denmark

In million Danish Crowns

FiBL  www.fibl.org
Denmark: Public procurement drives the demand for organic food

The Organic Action Plan 2020 - The Kitchen Project

1. Organic spearhead municipalities
2. Training of kitchen staff
3. Securing supply with organic food
4. Promotion of the Organic Cuisine Logo
Denmark: Import: breakdown by group (based on value)

Source: Statistics Denmark

- Fruit and nuts: 22%
- Vegetables: 12%
- Feedstuffs: 10%
- Cereals: 13%
- Milk and Dairy products: 3%
- Fats and oils: 7%
- Meat and meat products: 3%
- Other: 30%
Germany

FR: Growth of the organic farmland and organic share 2004-2016
Source: AMI

DE: Growth of the organic market and organic share 2004-2016
Source: AMI
German organic market: Highlights 2017
(Source: AMI)

• Supply with raw materials remains a big topic for processors
• Organic area grew by 10 %
• Supermarkets, drug stores and discounters expand their product ranges
• Natural food stores are facing this competition and have to find new marketing strategies, growth rates have slowed down
• Milk and dairy products and meat were the most successful product groups in 2017
• Market grew by nearly 6 % up to 10.04 billion EUR: 5.1 – 5.2 % organic share
Organic food sales in Germany 2017

In billion EUR excl. Catering

Supermarkets
Incl. drug stores

Natural food stores
Incl. big farm shops with more than 50,000 EUR additional purchase

Other sales channels
Bakeries, butchers, fruit & vegetable shops, farmer’s markets, small farm shops, Online shops, health food shops, petrol stations

Source: AMI 2018
Organic shares are rising

Organic share of the total food market in Germany, in % of total market

* Estimation depending on the development of the total food market 2017

Source: AMI 2018
Organic shares of different products

Organic shares of household purchases of fresh products in Germany 2016, volume (MT) shares in %

- Eggs: 12.4%
- Drinking Milk: 8.0%
- Vegetable Oils: 7.2%
- Vegetables: 7.1%
- Fruit: 6.0%
- Yoghurt: 5.9%
- Potatoes: 5.3%
- Bread: 4.2%
- Butter: 3.6%
- Cream Cheese: 3.5%
- Cheese: 2.6%
- Red Meat: 2.0%
- Milk drinks: 1.8%
- Poultry: 1.5%
- Sausage products: 1.3%
- Margarine: 0.6%

Source: AMI 2018
Tops and Flops 2017

Growth rates of sales volumes and sales values of household purchases in Germany, 2017 vs. 2016 in %

<table>
<thead>
<tr>
<th>Product</th>
<th>Sales value (EUR)</th>
<th>Sales volume (MT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Butter</td>
<td>24.9</td>
<td>8.6</td>
</tr>
<tr>
<td>Red Meat</td>
<td>15.1</td>
<td>14.2</td>
</tr>
<tr>
<td>Cheese</td>
<td>14.2</td>
<td>12.5</td>
</tr>
<tr>
<td>Flour</td>
<td>13.9</td>
<td>7.1</td>
</tr>
<tr>
<td>Drinking Milk</td>
<td>13.0</td>
<td>12.2</td>
</tr>
<tr>
<td>Vegetable Oils</td>
<td>11.3</td>
<td>11.3</td>
</tr>
<tr>
<td>Eggs</td>
<td>9.7</td>
<td>7.9</td>
</tr>
<tr>
<td>Poultry</td>
<td>7.7</td>
<td>6.5</td>
</tr>
<tr>
<td>Bread</td>
<td>7.7</td>
<td>2.2</td>
</tr>
<tr>
<td>Sausage products</td>
<td>7.4</td>
<td>5.6</td>
</tr>
<tr>
<td>Fruit</td>
<td>6.9</td>
<td>4.8</td>
</tr>
<tr>
<td>Yoghurt</td>
<td>6.4</td>
<td>4.3</td>
</tr>
<tr>
<td>Vegetable</td>
<td>4.5</td>
<td>6.8</td>
</tr>
<tr>
<td>Potatoes</td>
<td>-1.6</td>
<td>-2.6</td>
</tr>
</tbody>
</table>

Source: AMI 2018
Key import products for Germany: High import shares for many products

Import shares of selected organic products, in business years %

- Soy beans (incl.…): 94%
- Field peas: 61%
- Grain maize: 46%
- Carrots: 46%
- Butter: 42%
- Drinking milk: 37%
- Wheat: 34%
- Appels: 31%
- Pork: 26%
- Potatoes: 24%
- Yoghurt: 24%
- Cereals total: 24%

Source: AMI 2018
Germany: Animal-friendly husbandry the most important reason for buying organic

Gründe für den Kauf von Biolebensmitteln: artgerechte Tierhaltung wichtig, Beratung und fairer Handel weniger

artgerechte Tierhaltung 93%
regionale Herkunft/Unterstützung regionaler Betriebe 91%
weniger Zusatz- und Verarbeitungshilfsstoffe 88%
möglichst geringe Schadstoffbelastung 87%
Beitrag zur Unterstützung des ökologischen Landbaus 86%
gesunde Ernährung zur Stärkung des Wohlbefindens 84%
Beitrag zum effektiven Umweltschutz 81%
Sicherheit, gentechnikfreie Lebensmittel zu erhalten 81%
Beitrag zur Erhaltung/Förderung der biologischen Vielfalt/Biodiversität 75%
Erreichbarkeit der Lebensmittel in den gewohnten Einkaufsstätten 71%
Geschmack 71%
Ernährung für Kinder bzw. bei Schwangerschaft 66%
Lebensmittelskandale 63%
gleichzeitig/oft fair gehandelt 59%
Beratung durch Fachpersonal 38%

Angaben in Prozent
n=706; Befragte, die zumindest gelegentlich Biolebensmittel kaufen
nur Ja-Anteil dargestellt

Frage: Was sind die Gründe, die Sie dazu veranlassen, Bioprodukte zu kaufen?
UK: Growth of the organic farmland and organic share 2004-2016
Source: Eurostat

UK: Growth of the organic market and organic share 2004-2016
Source: Soil Association

FiBL
www.fibl.org
Switzerland

**CH: Growth of the organic farmland and organic share 2004-2016**

Source: BFS

<table>
<thead>
<tr>
<th>Year</th>
<th>Hectares</th>
<th>Organic share in percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>114,560.7</td>
<td>10.8%</td>
</tr>
<tr>
<td>2005</td>
<td>117,116.6</td>
<td>11.0%</td>
</tr>
<tr>
<td>2006</td>
<td>117,816.1</td>
<td>11.1%</td>
</tr>
<tr>
<td>2007</td>
<td>114,323.3</td>
<td>10.8%</td>
</tr>
<tr>
<td>2008</td>
<td>120,871.0</td>
<td>10.6%</td>
</tr>
<tr>
<td>2009</td>
<td>116,688.8</td>
<td>10.6%</td>
</tr>
<tr>
<td>2010</td>
<td>122,176.8</td>
<td>11.2%</td>
</tr>
<tr>
<td>2011</td>
<td>128,139.9</td>
<td>12.2%</td>
</tr>
<tr>
<td>2012</td>
<td>133,972.9</td>
<td>13.1%</td>
</tr>
<tr>
<td>2013</td>
<td>137,233.3</td>
<td>13.5%</td>
</tr>
<tr>
<td>2014</td>
<td>141,249.0</td>
<td>13.5%</td>
</tr>
<tr>
<td>2015</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**CH: Growth of the organic market and organic share 2004-2016**

Source: Bio Suisse

<table>
<thead>
<tr>
<th>Year</th>
<th>Million Euros</th>
<th>Organic share in percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>770</td>
<td>3.5%</td>
</tr>
<tr>
<td>2005</td>
<td>765</td>
<td>3.5%</td>
</tr>
<tr>
<td>2006</td>
<td>790</td>
<td>4.6%</td>
</tr>
<tr>
<td>2007</td>
<td>910</td>
<td>4.9%</td>
</tr>
<tr>
<td>2008</td>
<td>1,023</td>
<td>5.2%</td>
</tr>
<tr>
<td>2009</td>
<td>1,187</td>
<td>5.7%</td>
</tr>
<tr>
<td>2010</td>
<td>1,412</td>
<td>6.3%</td>
</tr>
<tr>
<td>2011</td>
<td>1,520</td>
<td>6.9%</td>
</tr>
<tr>
<td>2012</td>
<td>1,686</td>
<td>7.1%</td>
</tr>
<tr>
<td>2013</td>
<td>1,817</td>
<td>7.7%</td>
</tr>
<tr>
<td>2014</td>
<td>2,175</td>
<td>8.4%</td>
</tr>
<tr>
<td>2015</td>
<td>2,298</td>
<td>9.0%</td>
</tr>
<tr>
<td>2016</td>
<td>2,500</td>
<td>9.0%</td>
</tr>
</tbody>
</table>
Major retailers are key players and key promoter of organic food markets
Major processors and handlers include an organic product range

Source: Coop
Trend: Local super foods are gaining importance
Coop Switzerland: New product line: Bio Campiuns

Swiss super foods in organic quality
High nutritional value: High level of vitamins and minerals
Often wild collection products
Low levels of sugar and salt
Voluntary Sustainability Standards (VSS) are becoming important players on the market for sustainable products

- 4C (Global Coffee Platform)
- Better Cotton Initiative (BCI)
- Bonsucro
- Cotton Made in Africa
- Fairtrade International
- Forest Stewardship Council (FSC)
- GLOBALG.A.P.
- IFOAM – Organics International
- Programme for the Endorsement of Forest Certification (PEFC)
- ProTerra Foundation
- Rainforest Alliance/Sustainable Agriculture Network
- Roundtable on Sustainable Palm Oil (RSPO)
- Round Table on Responsible Soy (RTRS)
- UTZ
Development of coffee area with sustainability certification
Cocoa area share of total VSS area 2015
Source: FiBL-IISD-ITC survey 2017; Fairtrade International 2017; FiBL survey 2017; Rainforest Alliance/SAN 2016; UTZ 2016

Coffee area share of total VSS area 2015
Source: FiBL-IISD-ITC survey 2017; Fairtrade International 2017; FiBL survey 2017; Rainforest Alliance/SAN 2016; UTZ 2016

FiBL www.fibl.org
Voluntary Sustainability Standards (VSS) and organic: Area and retail sales compared

Total certified area per VSS 2015

Organic: The ten countries with the largest markets for organic food 2015
Source: FiBL-AMI survey 2017

Fairtrade: Top 10 countries with the largest markets for Fairtrade food 2015
Source: Fairtrade International 2016
Summary

- In 2016 organic farming continued to grow and an all time high for organic farmland, producers, market was reached.
- However, the development varies a lot between countries and regions.
- Other than in the past ten years, area growth is accelerating, however, particularly in Europe, production is still not keeping pace with the market development.
- For better monitoring of the development of the sector and to increase transparency, data collection and processing need to be improved in many countries, in particular for market and international trade data.
Trends

- European markets are among the world leaders (total value, market share, per capita consumption)
- Organic market grows by 10 percent and more annually in many countries
- Organic market shares are approaching the 10% mark in some countries
- The organic area is not growing as fast as the retail sales: Supply with raw materials remains a big topic for processors
- General retailers are the most important marketing channel in most countries
- General retailers are gaining market share
- General retailers are dominating the organic market, but channels are diversifying
- Some major retailers are key players and key promoters of organic food markets
- More consumers buy organic food
- European consumers spend more organic food than most other countries
Trends

• Consumers want a comprehensive offer of organic supply, covering all marketing outlets
• Consumers want healthy, pesticide-free food produced with environment- and animal-friendly methods – however motivation to buy organic vary from country to country
• Fruit & vegetables and dairy products continue to be the most popular product groups
• Some products and product groups reach more than 10 percent of their respective totals
• Major processors and handlers are including an organic product range into their offer
• (Local) super foods are gaining importance
• Export and imports are increasing
• Voluntary Sustainability Standards (VSS) are becoming important players on the market for sustainable products
Contact

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www.fibi.org
Resources
Resources

- Slides and infographics at www.organic-world.net
- Twitter.com/fiblstatistics
- Interactive maps at www.organic-world.net
- Interactive data tables at statistics.fibl.org
- Interactive map at www.ifoam-eu.org
<table>
<thead>
<tr>
<th>Indicator</th>
<th>World</th>
<th>Leading countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Countries with data on certified organic agriculture</td>
<td>2016: 178 countries</td>
<td></td>
</tr>
<tr>
<td>Organic agricultural land</td>
<td>2016: 57.8 million hectares (1999: 11 million hectares)</td>
<td>Australia (27.1 million hectares)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Argentina (3.0 million hectares)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>China (2.3 million hectares)</td>
</tr>
<tr>
<td>Share of total agricultural land</td>
<td>2016: 1.2 %</td>
<td>Liechtenstein (37.7 %)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>French Polynesia (31.3 %)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Samoa (22.4%)</td>
</tr>
<tr>
<td>Further, non-agricultural organic areas (mainly wild</td>
<td>2016: 39.9 million hectares</td>
<td>Finland (11.6 million hectares)</td>
</tr>
<tr>
<td>collection)</td>
<td></td>
<td>Zambia (6.7 million hectares)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>India (4.2 million hectares)</td>
</tr>
<tr>
<td>Producers</td>
<td>2016: 2.7 million producers (1999: 200'000 producers)</td>
<td>India (835'000)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Uganda (210'352)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mexico (210'000)</td>
</tr>
<tr>
<td>Organic market size</td>
<td>2016: 89.7 billion US dollars (more than 80 billion euros) (2000: 17.9 billion US dollars)</td>
<td>US (43.1 billion US dollars; 38.9 billion euros)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Germany (10.5 billion US dollars; 9.5 billion euros)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>France (7.5 billion US dollars; 6.7 billion euros)</td>
</tr>
<tr>
<td>Per capita consumption</td>
<td>2016: 12.1 US dollars (11.3 euros)</td>
<td>Switzerland (304 US dollars; 274 euros)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Denmark (252 US dollars; 227 euros)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sweden (218 US dollars; 197 euros)</td>
</tr>
<tr>
<td>Number of countries with organic regulations</td>
<td>2017: 87 countries</td>
<td></td>
</tr>
<tr>
<td>Number of IFOAM affiliates</td>
<td>2017: 1'003 affiliates from 127 countries</td>
<td>India - 111 affiliates; Germany - 88 affiliates; United States- 63 affiliates; China - 56 affiliates</td>
</tr>
</tbody>
</table>

Source: FiBL 2018
Europe: Area trends 2016

In Europe, **13.5 million hectares were organic in 2016** (European Union: 12.1 million hectares). With more than 2 million hectares, Spain continues to be the country with the largest organic area in Europe, followed by Italy (1.8 million hectares) and France (1.5 million hectares).

The organic land increased by almost one million hectares in Europe and in the European Union, representing **an increase of 6.7 percent in Europe** and 8.2 percent in the European Union. Growth was higher than in 2015 and substantially higher than in the first years of the current decade. In the decade 2007-2016, organic agricultural land increased by two thirds.

**Organic farmland in Europe constitutes 2.7 percent of the total agricultural land** and 6.7 percent in the European Union. In Europe (and globally), Liechtenstein has the highest organic share of all farmland (37.7 percent) followed by Austria, the country in the European Union with the highest organic share of agricultural land (21.9 percent).

Source: FiBL 2018
Europe: Operator trends 2016

There were more than **370’000 organic producers in Europe** (European Union: almost 300’000), and the largest numbers were in Turkey (almost 68’000) and Italy (more than 64’000). While the number of producers grew by 7 percent in Europe (10 percent in the European Union) in 2016, growth was 76 percent in Europe and 58 percent in the European Union during 2007-2016.

There were **almost 66’000 organic processors in Europe** and almost 63’000 in the European Union. Almost 4’700 importers were counted in Europe and almost 4’000 in the European Union. Particularly strong growth was noted for importers, which increased by double digits in both Europe and the European Union. The country with the largest number of processors was Italy (almost 17’000), while Germany had the most importers (almost 1’600).
Retail sales trends:

Organic retail sales in Europe were valued at 33.5 billion euros (30.7 billion euros in the European Union). The European Union represents the second largest single market for organic products in the world after the United States.

The European organic market recorded a growth rate of 11.4 percent (European Union: 12 percent), which is the second time retail sales have shown a double-digit growth rate since the financial crisis. Among the key markets, the highest growth was observed in France (22 percent). In the decade 2007-2016, the value of European and European Union markets has more than doubled.

European consumers spent 41 euros on organic food per person (European Union: 61 euros). Per capita consumer spending on organic food has doubled in the last decade. The Swiss spent the most money on organic food (274 euros per capita).

Globally, European countries account for the highest organic shares of total food sales as a percentage of their respective food markets. Denmark has the highest organic market share (10.5 percent).

Source: FiBL 2018