



Research Institute of Organic Agriculture FiBL
info.suisse@fibl.org | www.fibl.org



Organic agriculture globally and in Europe: Latest trends

Helga Willer, Research Institute of Organic Agriculture FiBL, Frick
Danish Organic Congress, November 21, 2023 (online presentation)

FiBL Switzerland with sites in Frick & Lausanne


- Founded in 1973
- 290 employees
- Research, consulting, continuing education and development cooperation
- Research in modern infrastructure at the Frick site and on over 150 Swiss organic farms
- FiBL institutes in Austria, France, Germany, Hungary and Brussels



The World of Organic Agriculture 2023

- › The 24th edition of «The World of Organic Agriculture», was published by FiBL and IFOAM – Organics International in February 2023.
- › Data tables
- › Country and continent reports
- › Markets, standards, policy support
- › More than 200 data and information providers
- › The book can be ordered or downloaded at (item number 1254): <https://www.fibl.org/en/shop-en>
- › www.organic-world.net
- › <https://statistics.fibl.org>

FiBL



FiBL **IFOAM**
ORGANICS
INTERNATIONAL

FiBL & IFOAM – ORGANICS INTERNATIONAL

THE WORLD OF
ORGANIC AGRICULTURE
STATISTICS & EMERGING TRENDS 2023

Continent	Area (Million HA)
OCEANIA	35.9
EUROPE	17.1
LATIN AMERICA	9.9
ASIA	6.1
NORTH AMERICA	3.7
AFRICA	2.1

Supported by

BIOFACH **coop**
into organic

Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra
Swiss Confederation
Federal Department of Economic Affairs,
Education and Research EAER
State Secretariat for Economic Affairs SECO

Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra
Swiss Confederation
Federal Department of Economic Affairs,
Education and Research EAER
State Secretariat for Economic Affairs SECO

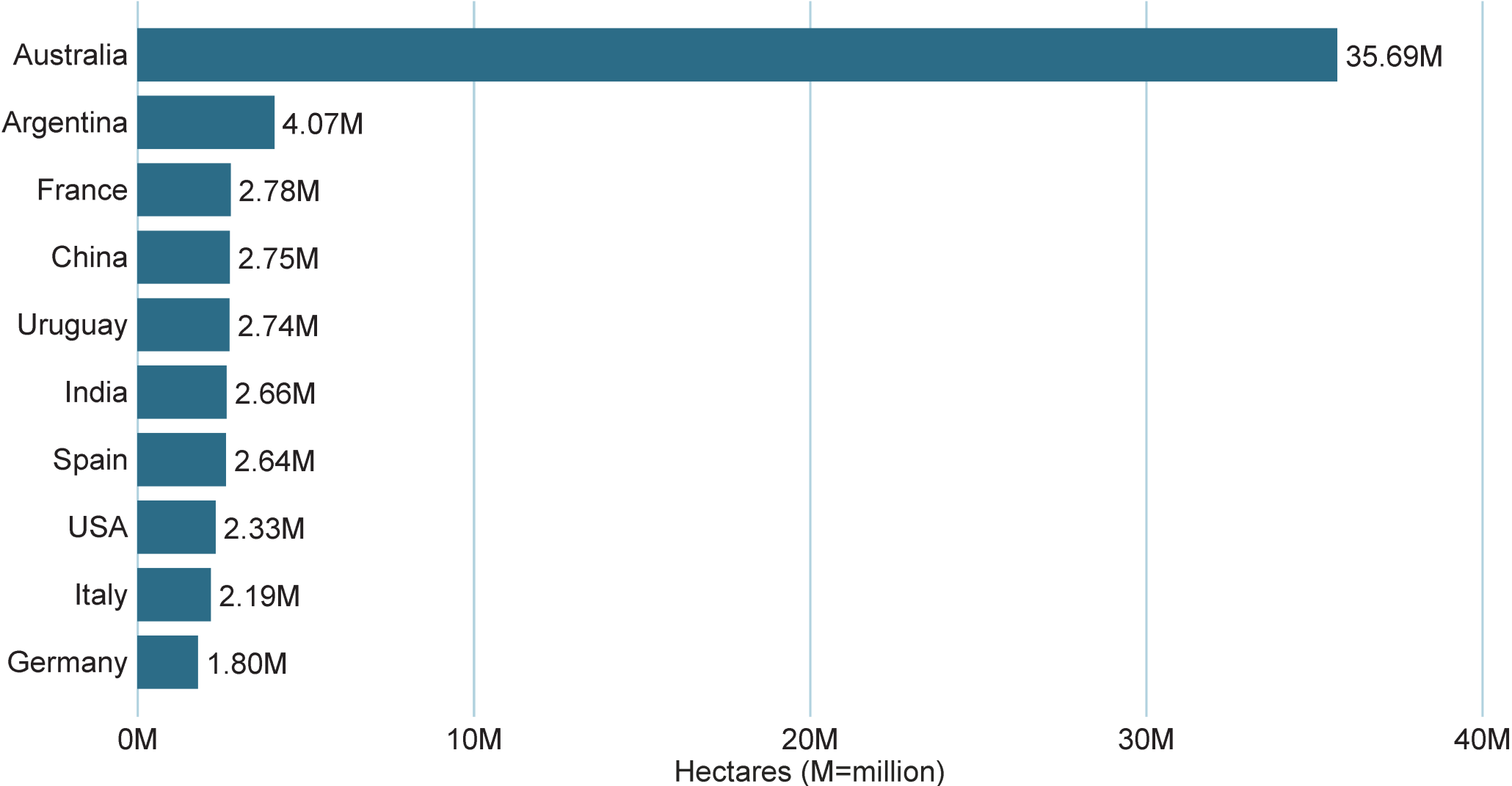
coop

BIOFACH
into organic

IFOAM
ORGANICS
INTERNATIONAL

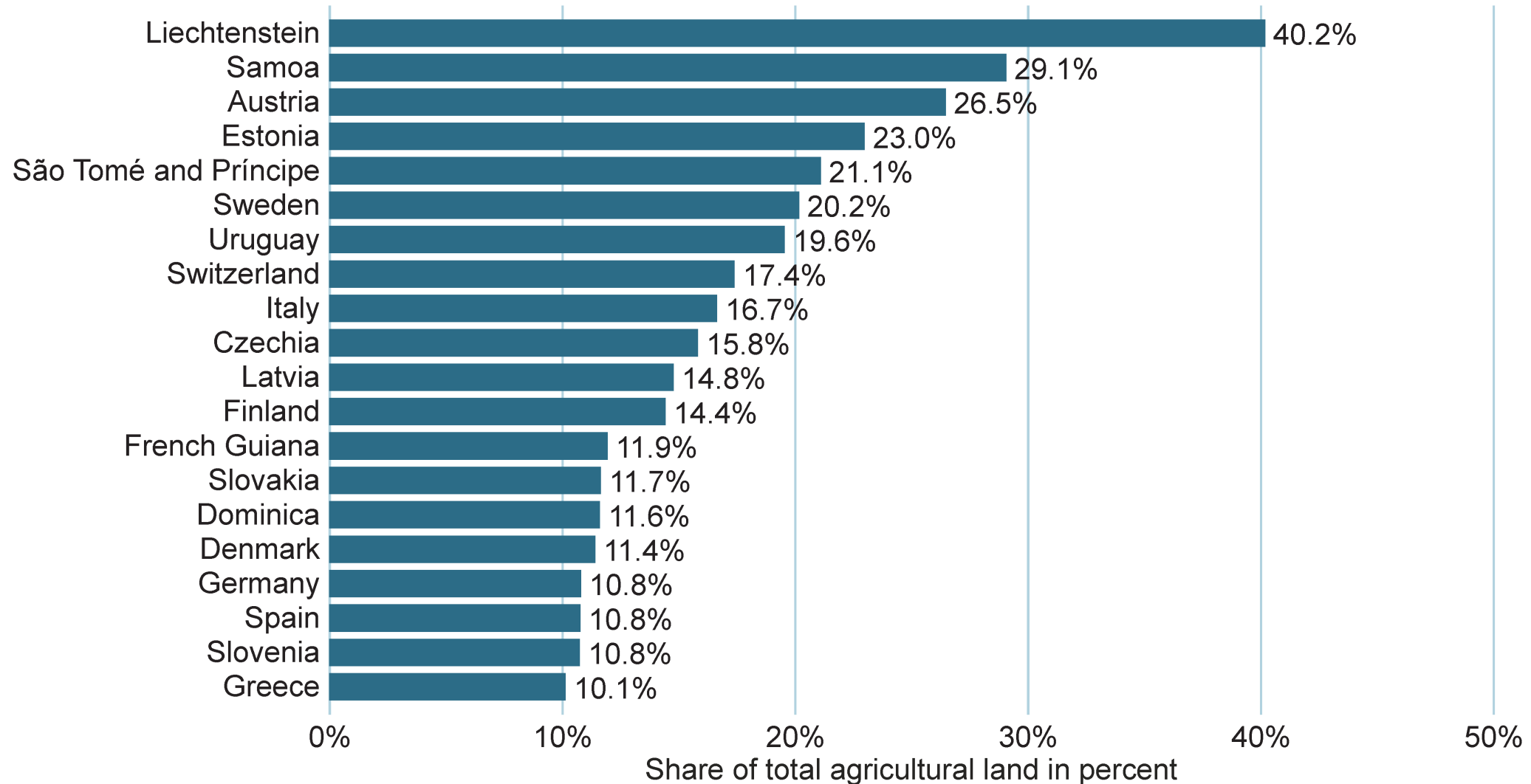
World: The ten countries with the largest areas of organic agricultural land 2021

Source: FiBL survey 2023



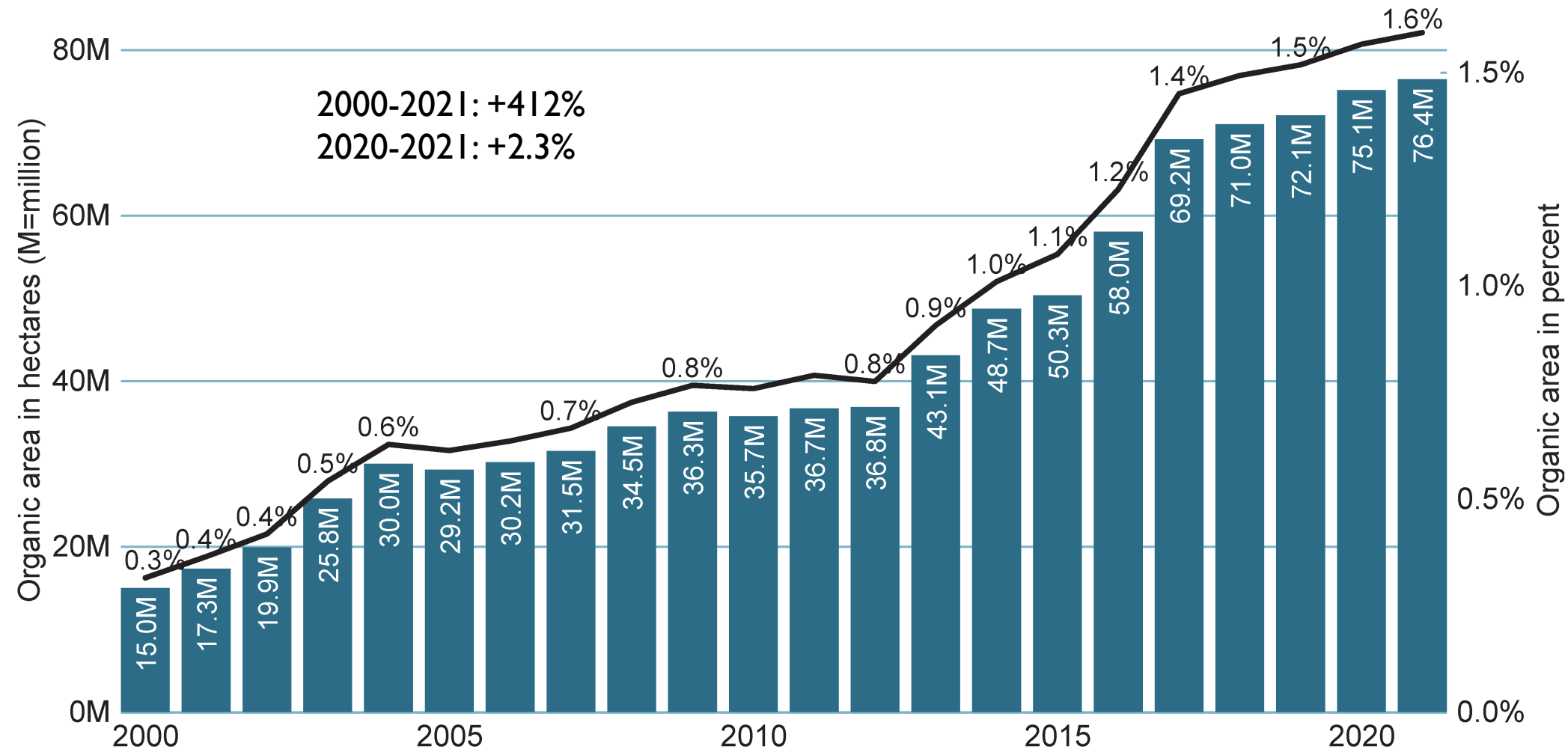
World: Countries with an organic share of the total agricultural land of at least 10 percent 2021

Source: FiBL survey 2023



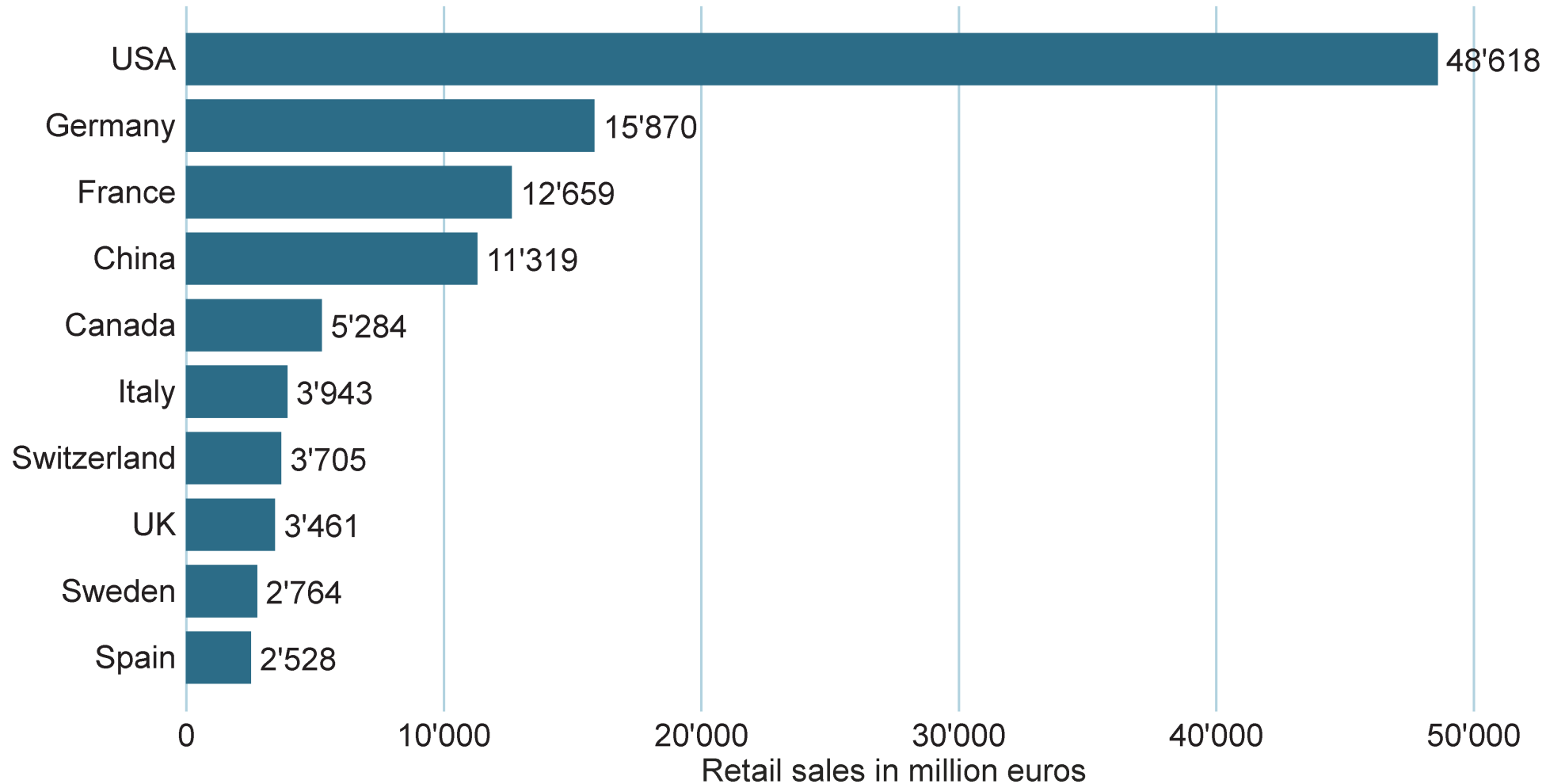
World: Growth of organic agricultural land and organic share 2000 - 2021

Source: FiBL-IFOAM-SOEL surveys 2001-2023



World: The countries with the largest markets for organic food 2021

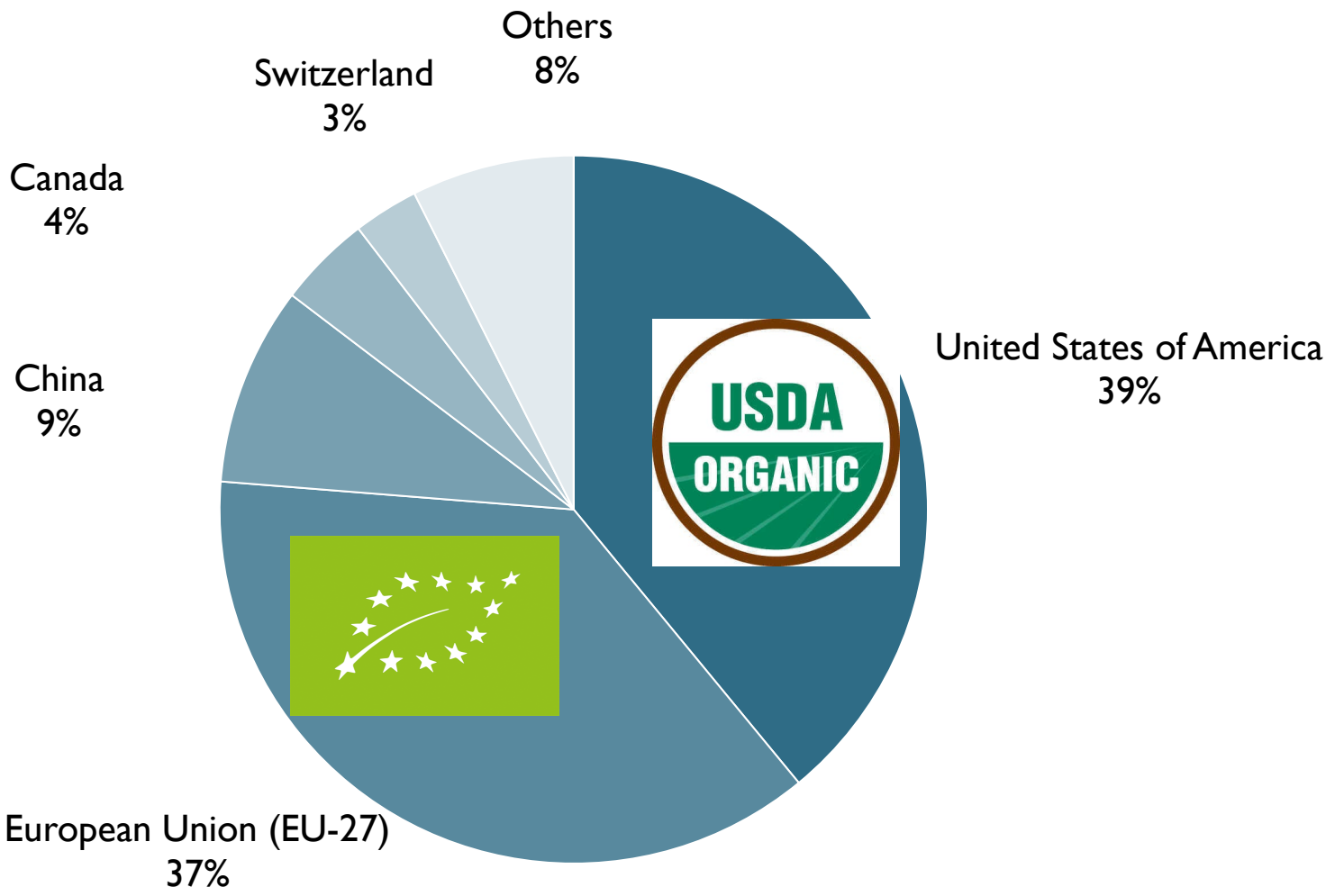
Source: FiBL-AMI survey 2023



World: Distribution of retail sales by single market 2021

(Total: 125 billion euros)

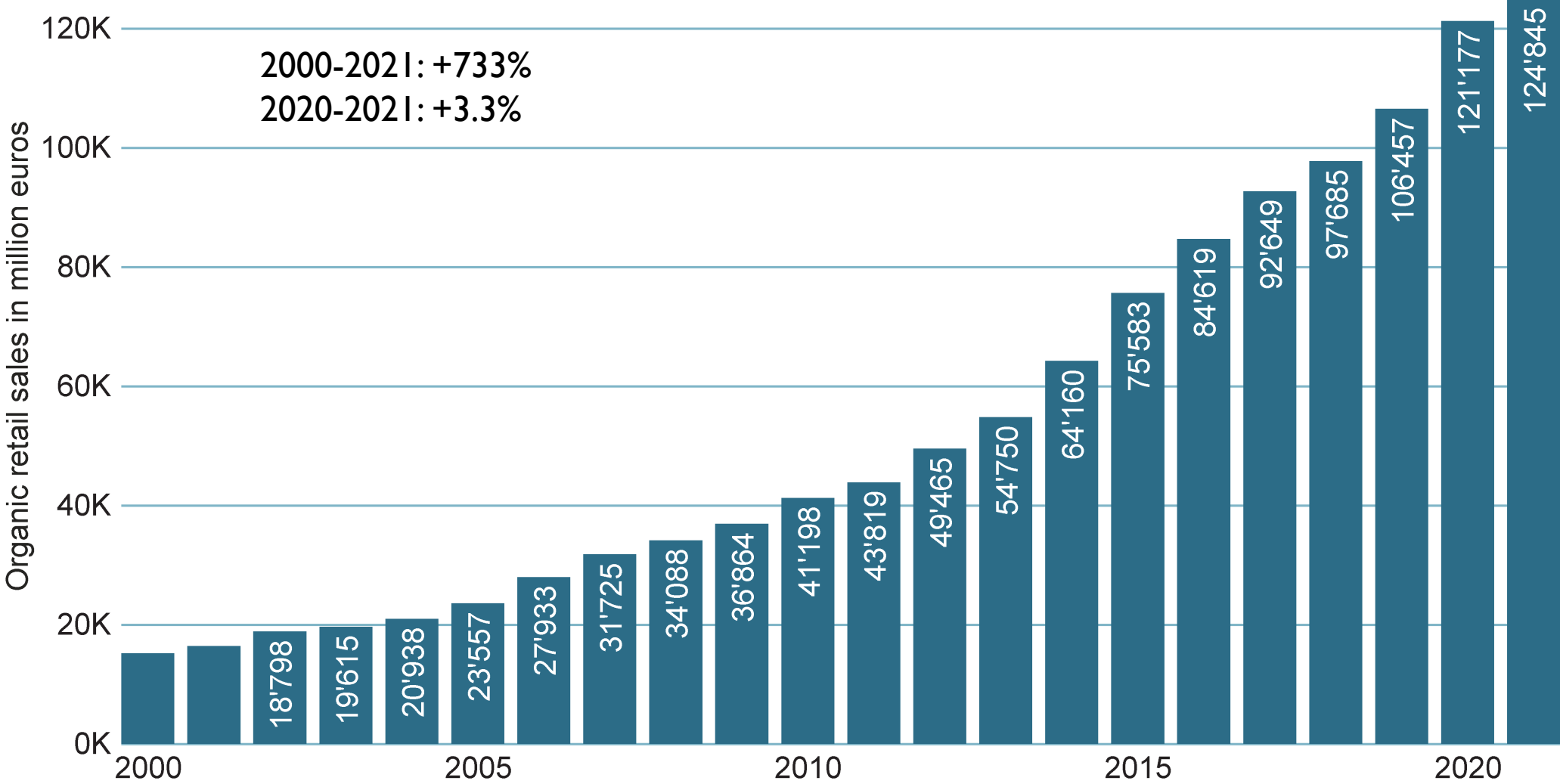
Source: FiBL-AMI survey 2022



Distribution of retail sales

World: Growth of organic retail sales 2000 - 2021

Source: FiBL survey 2001-2023



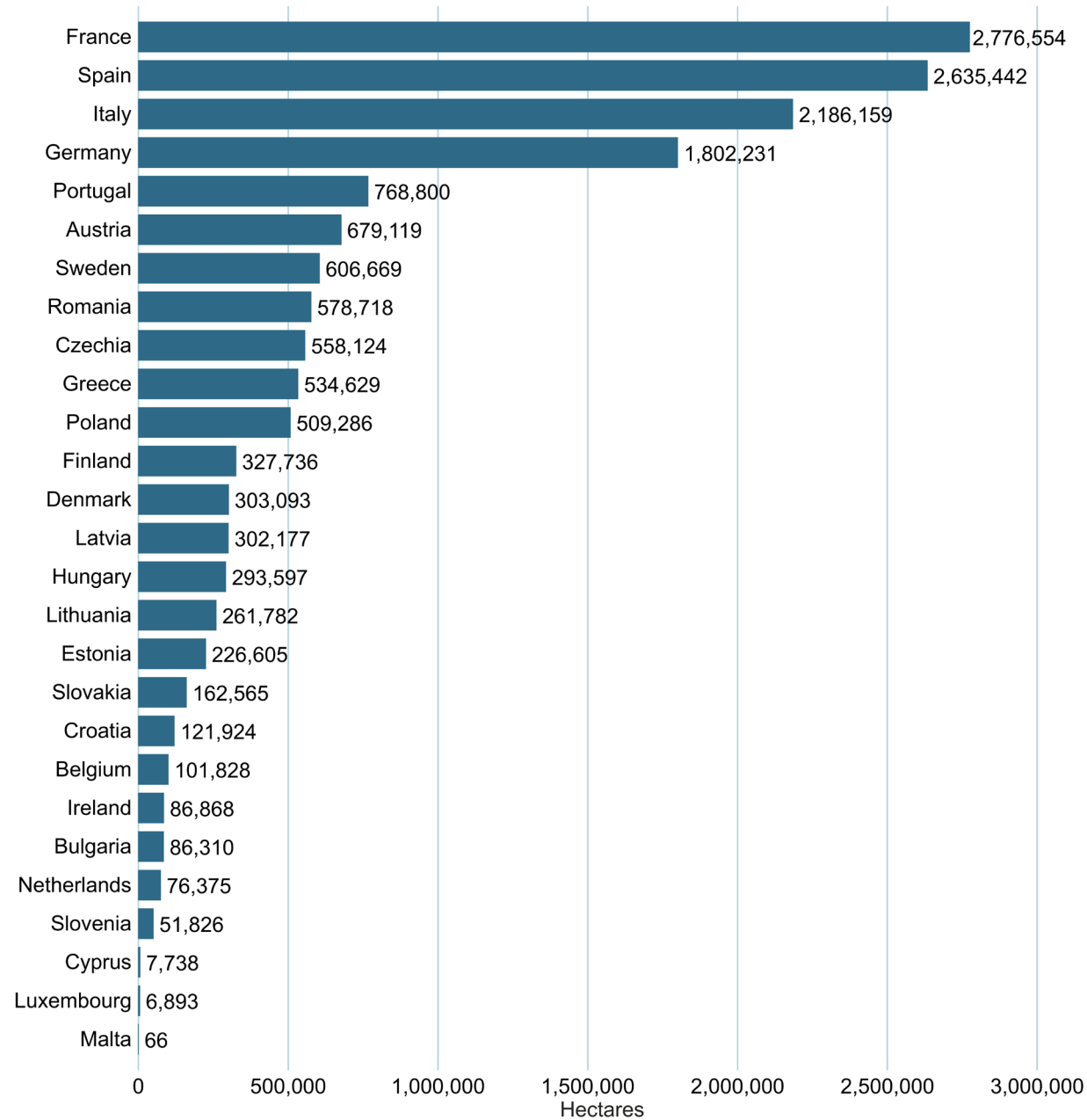
Global market – current issues

- Geopolitical conflicts and rising food prices are having a negative impact on the global organic food market.
- After record sales in 2020, market growth slowed to just 5 percent in 2021.
- Lower growth was noted for many countries in 2022 due to
 - weakened consumer demand
 - inflation, high food prices, and
 - food security concerns
- The European market has been the most adversely affected.

European data

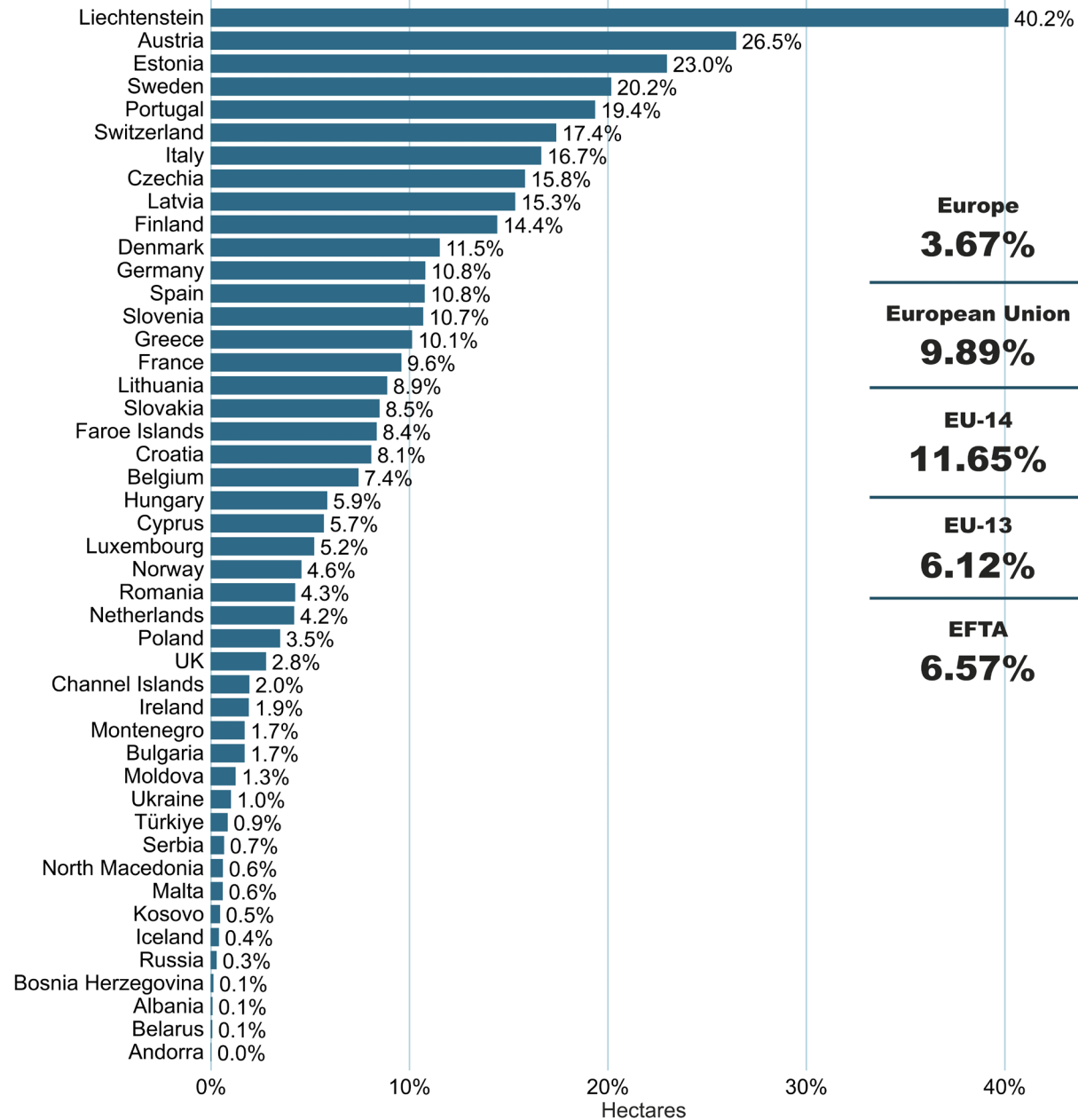
EU: Organic agricultural land by country 2021

Source: Eurostat 2023



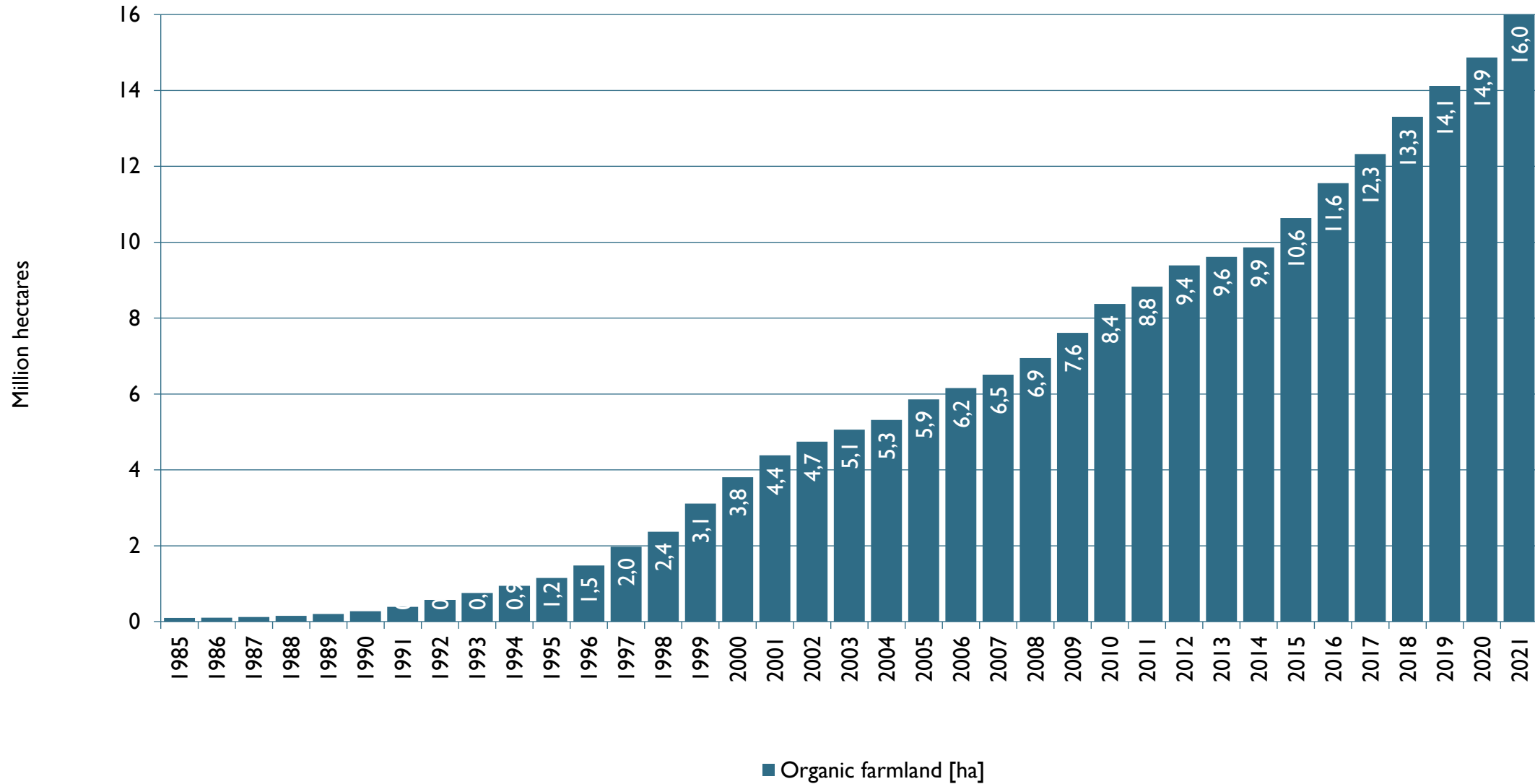
Europe: Organic shares of total agricultural land 2021

Source: FiBL-AMI survey 2023



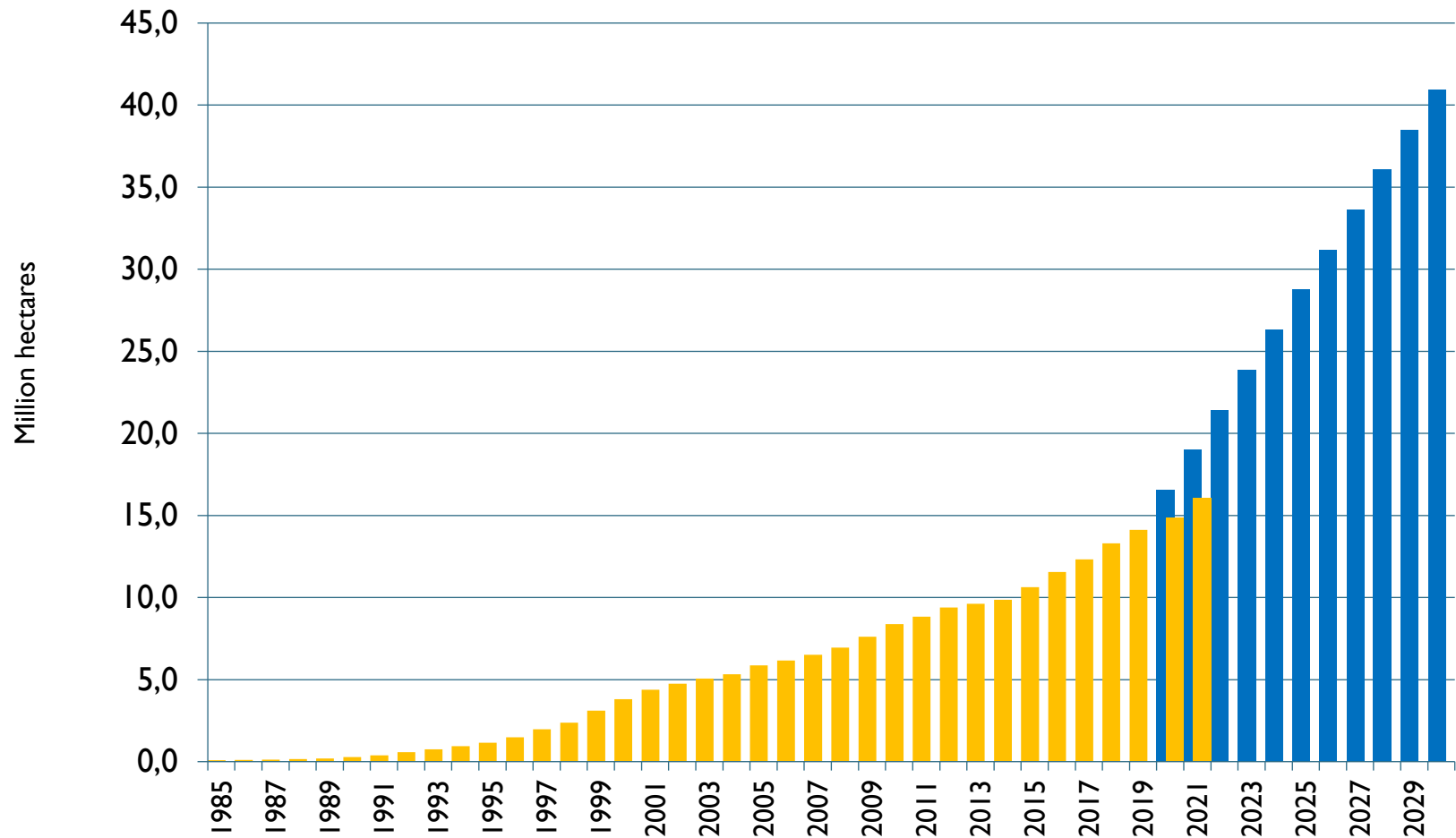
European Union: Organic farmland growth 1985-2021

Source: FiBL-AMI Survey, Nic Lampkin 1990-2023



European Union: Growth of the organic farmland 1985-2021

Source: FiBL Ssurvey based on Eurostat and national sources, FiBL calculation for the growth needed 2020-2030

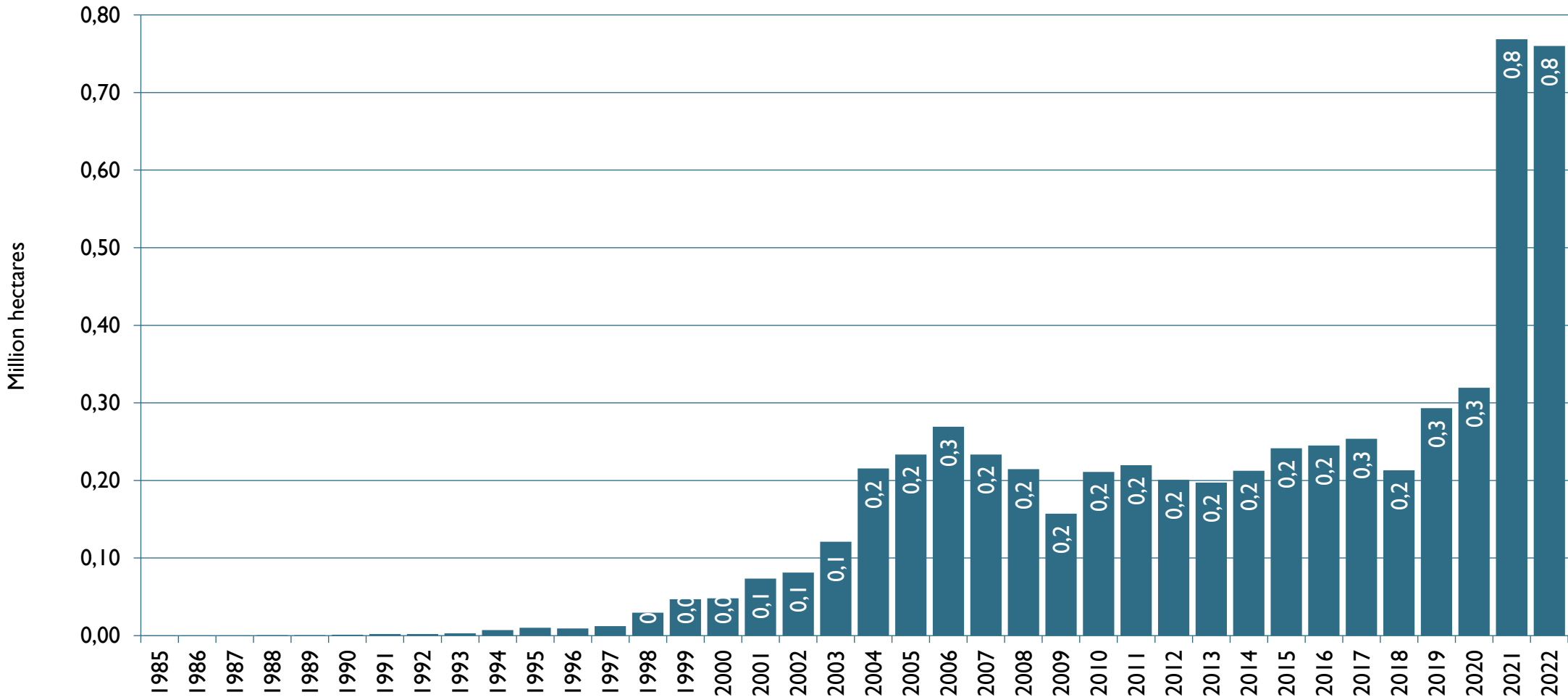


Yellow: Growth of organic farmland 1985- 2021

Blue: Growth needed to reach the 25% goal (40.5 Million hectares; a CGAR of approx 10%)

Portugal: Organic farmland growth 1985-2021

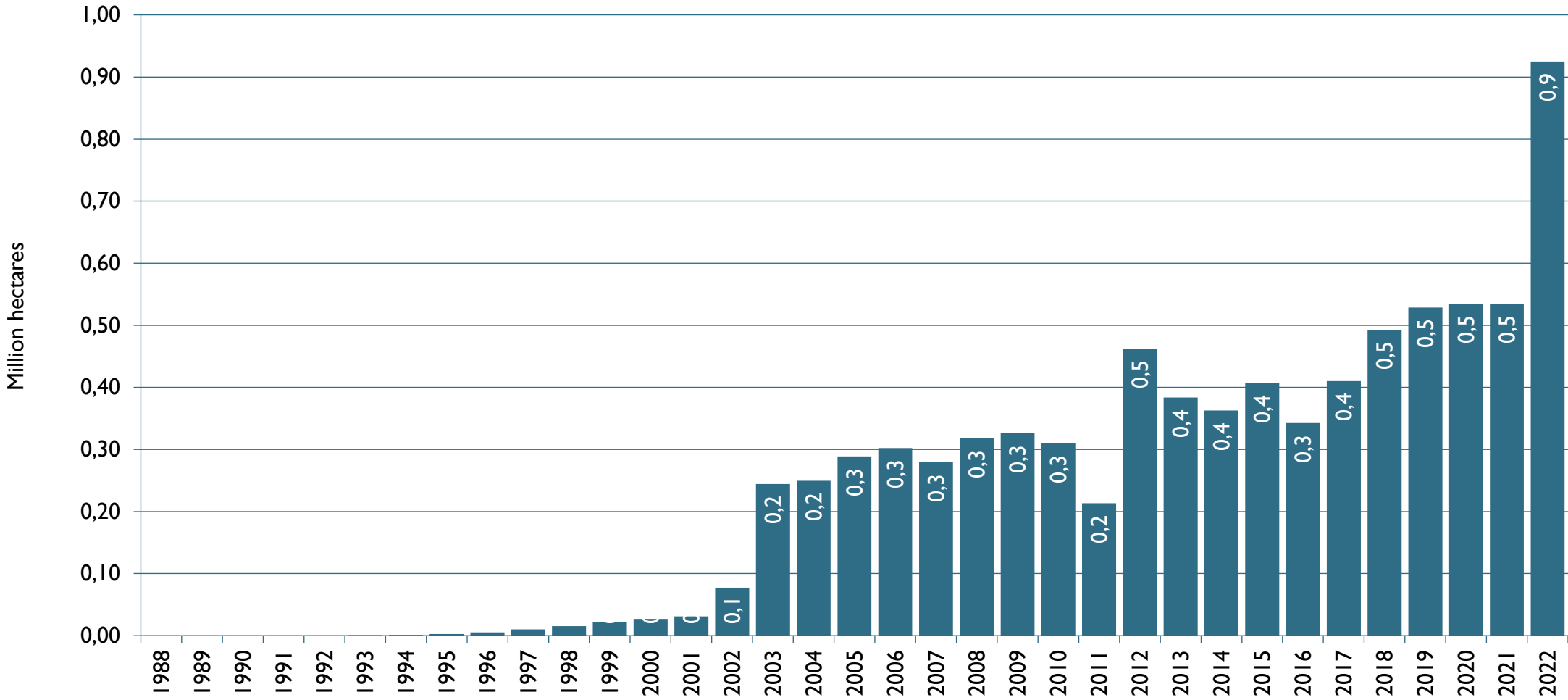
Source: FiBL-AMI Survey, Eurostat, Nic Lampkin



■ Organic farmland [ha]

Greece: Organic farmland growth 1985-2021

Source: FiBL-AMI Survey, Eurostat, Nic Lampkin



■ Organic farmland [ha]



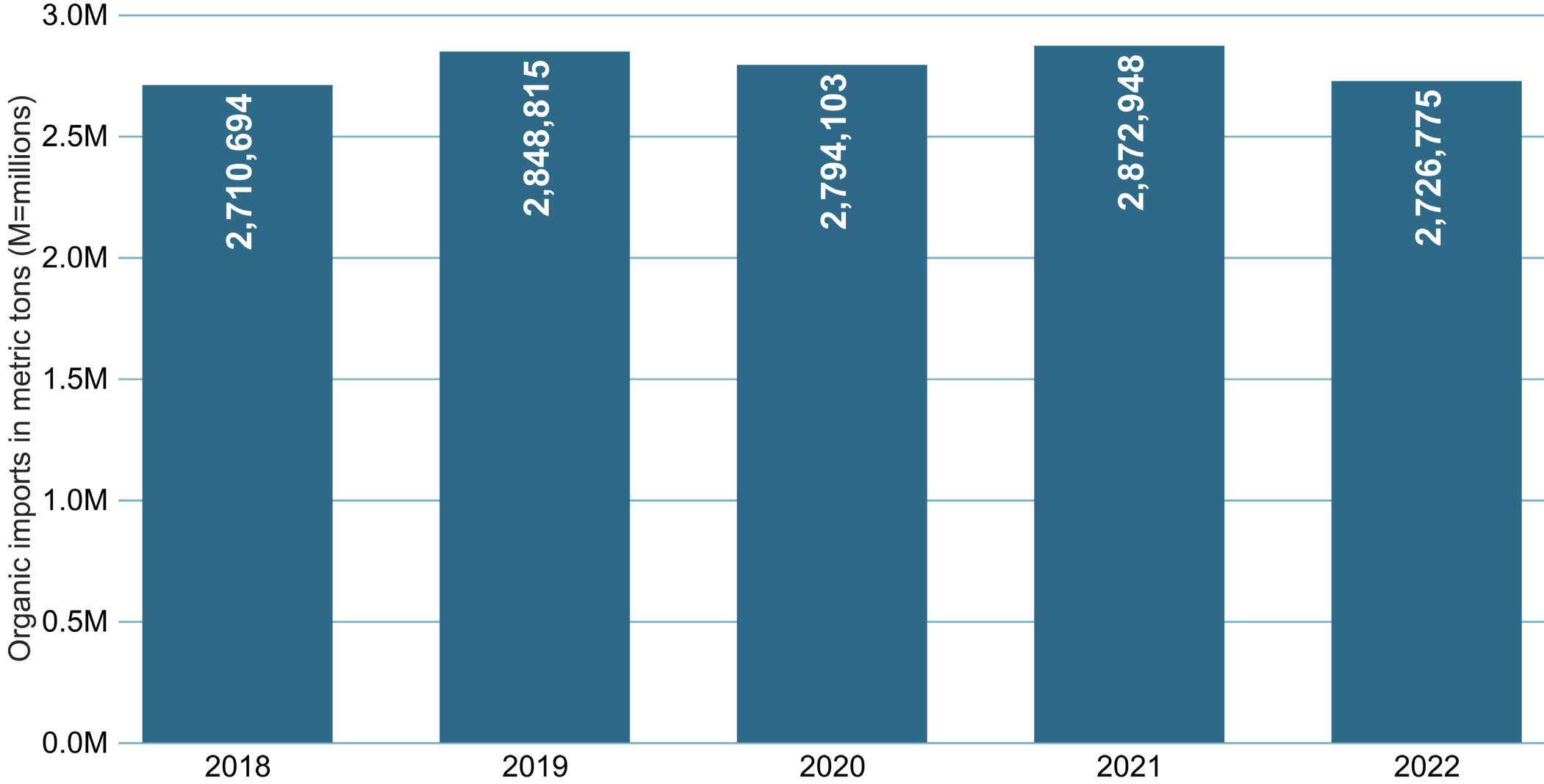
Conclusion organic farmland

- In 2021 EU organic farmland grew by 8% und thus faster than in the previous years.
- However, this growth will need to be sustained and reach even more than 10% annually to meet the 25% goal by 2030.
- Appropriate support measures are needed, especially in times of market stagnation.

Europe - Imports

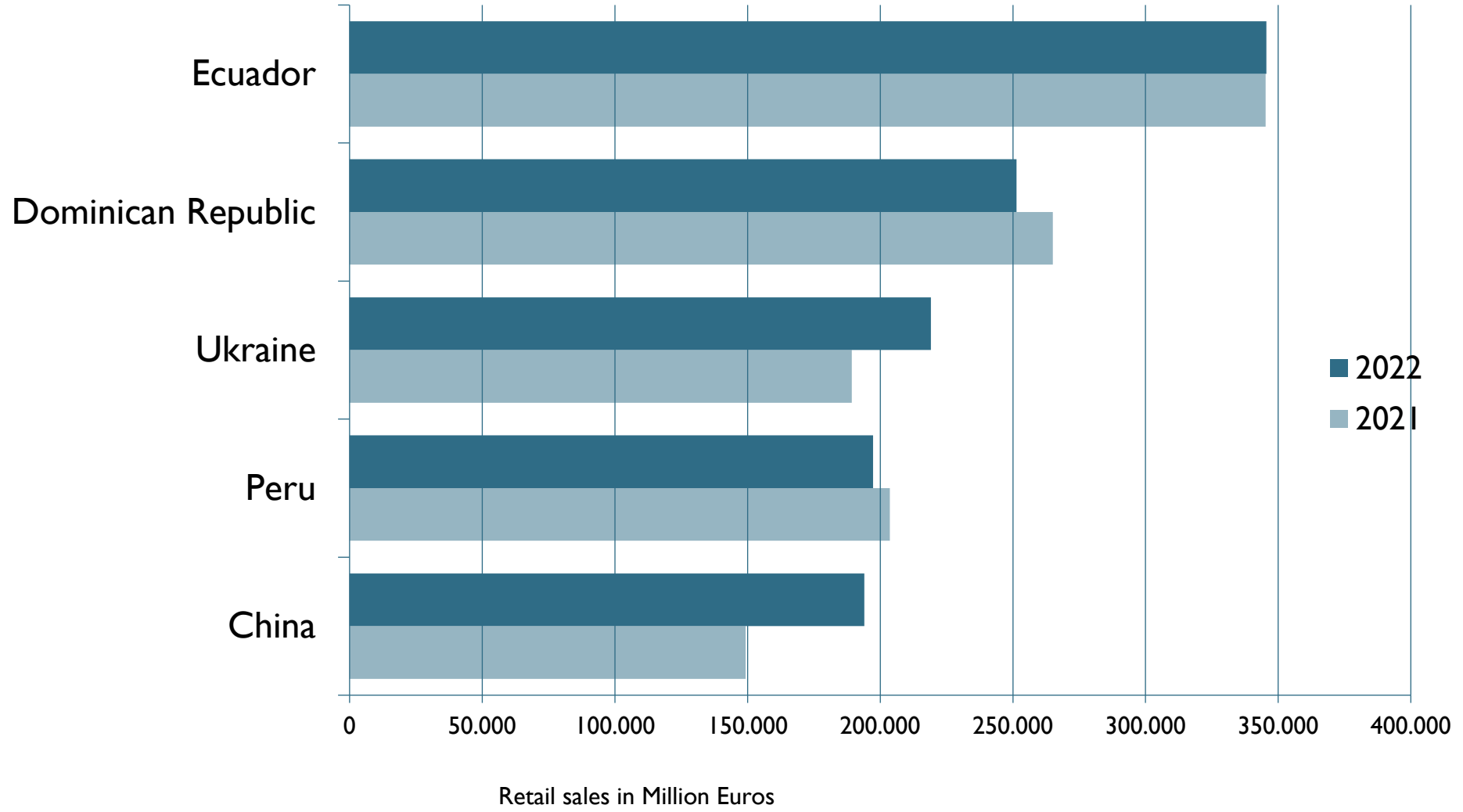
European Union: Organic agri-food imports development 2018 - 2022

Source: Traces/European Commission 2023



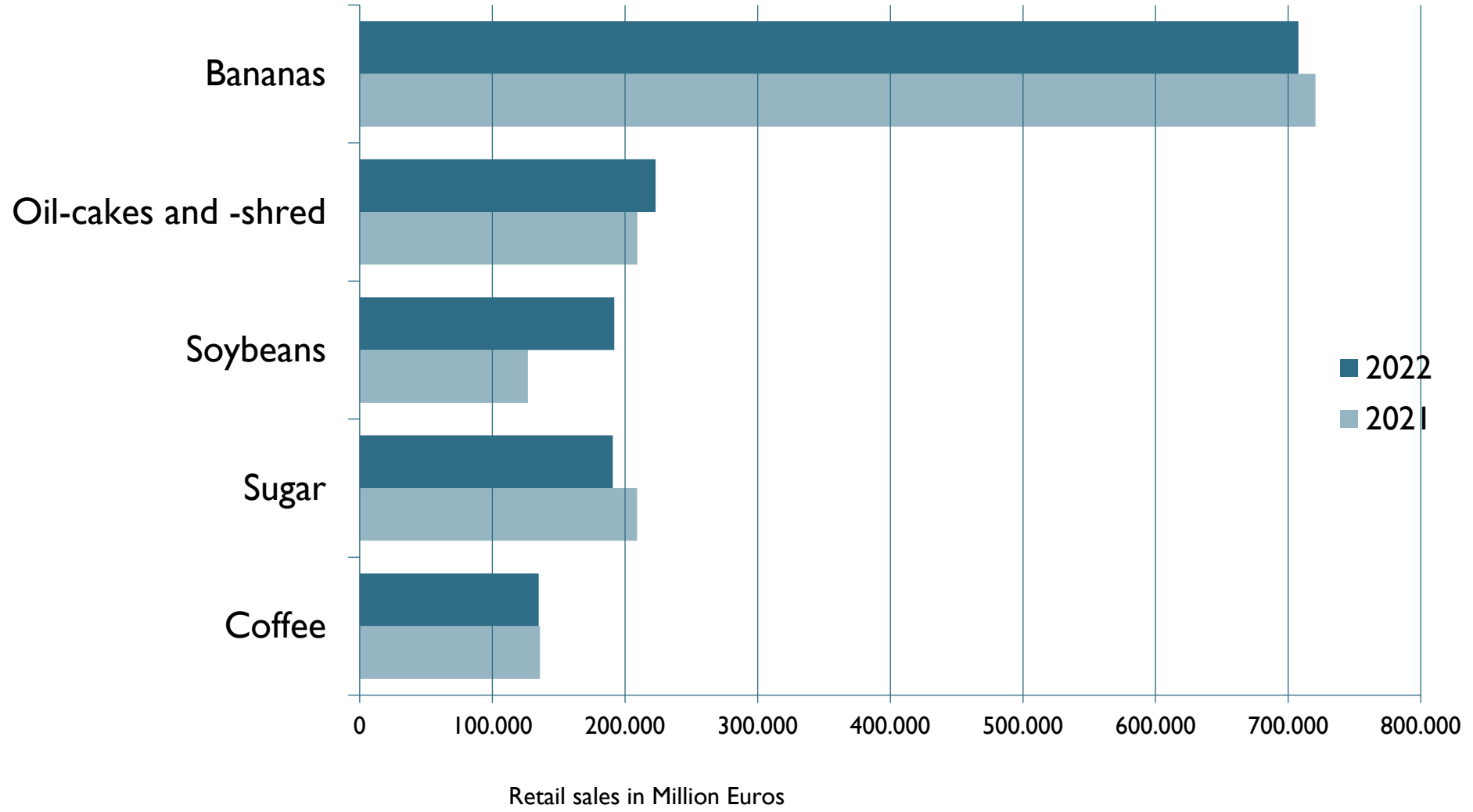
Top 5 exporting countries 2021 and 2022 compared

Source: TRACES 2023



Top 5 export products 2021 and 2022 compared

Source: TRACES 2023



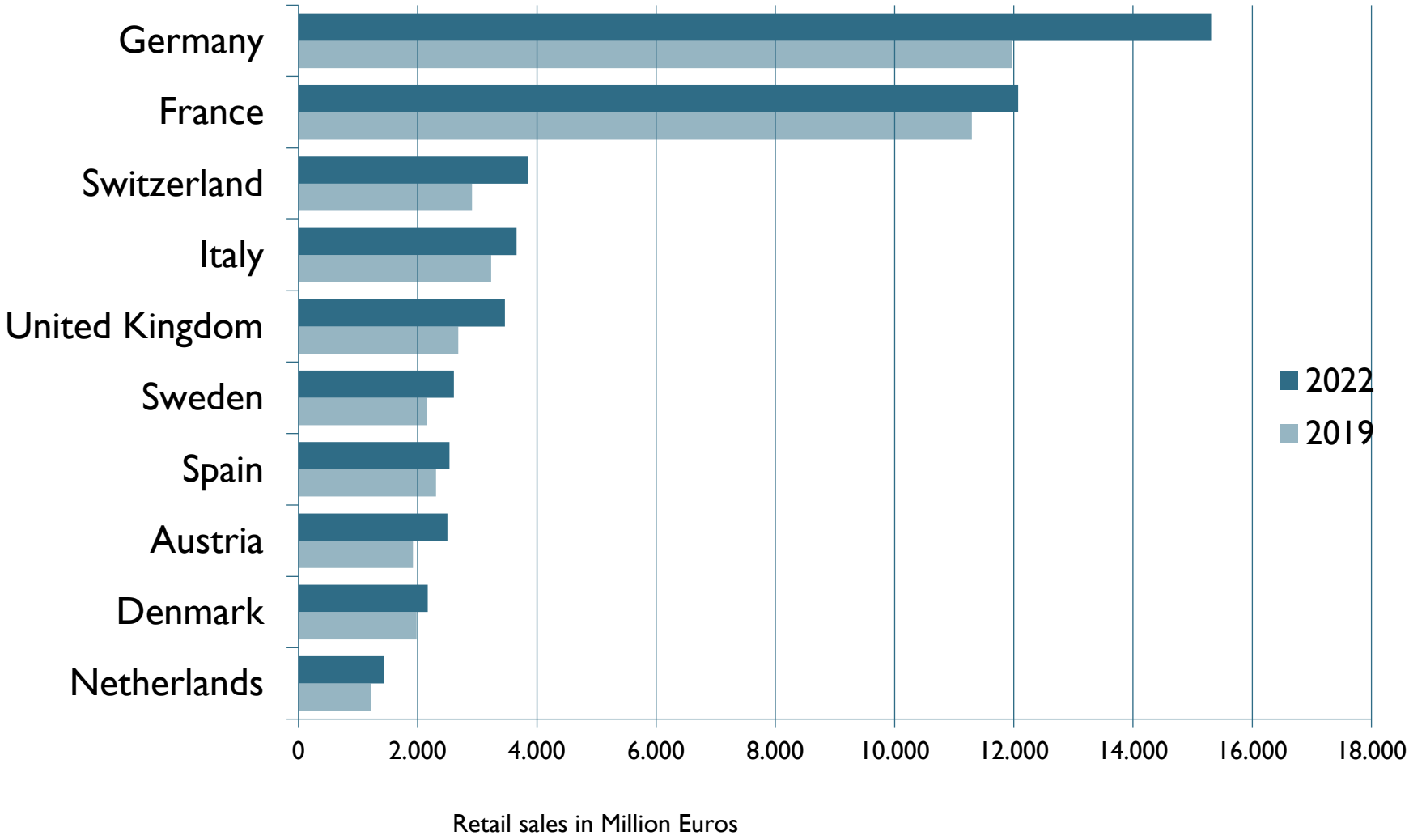
Trends in EU organic imports 2022

- **Trend 1: Slight decrease of EU organic imports in 2022**
which may be linked to market stagnation/decline
- **Trend 2: Increase in cereal and oilseed imports**
 - Increases in EU organic imports from China (post-pandemic recovery) and Ukraine (shipping to the US difficult)
 - Increase in soybeans from Africa
 - This shows that feedstuffs are mainly imported, whereas EU organic production focuses on arable crops for human consumption
- **Trend 3: Decrease in tropical crops**
 - Partly revocation of certificates (residue issues)
 - Due to the new organic regulation with changes in the requirements for group certification/internal control systems, many producers are expected to turn to other sustainability labels (Fairtrade, Rainforest, etc.)

Europe – Retail sales

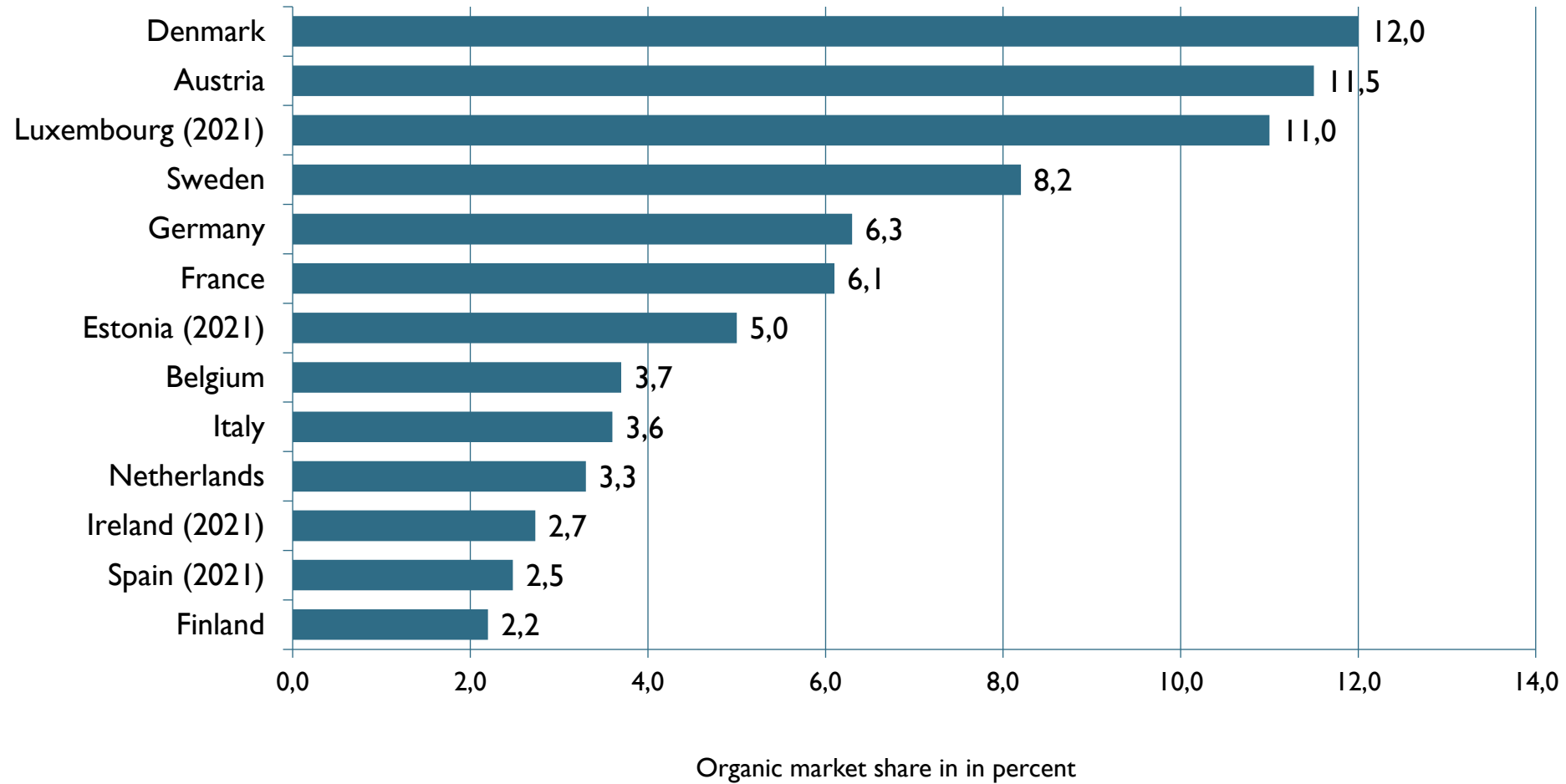
European markets 2019 and 2022 compared

Source: FiBL AMI Survey 2023



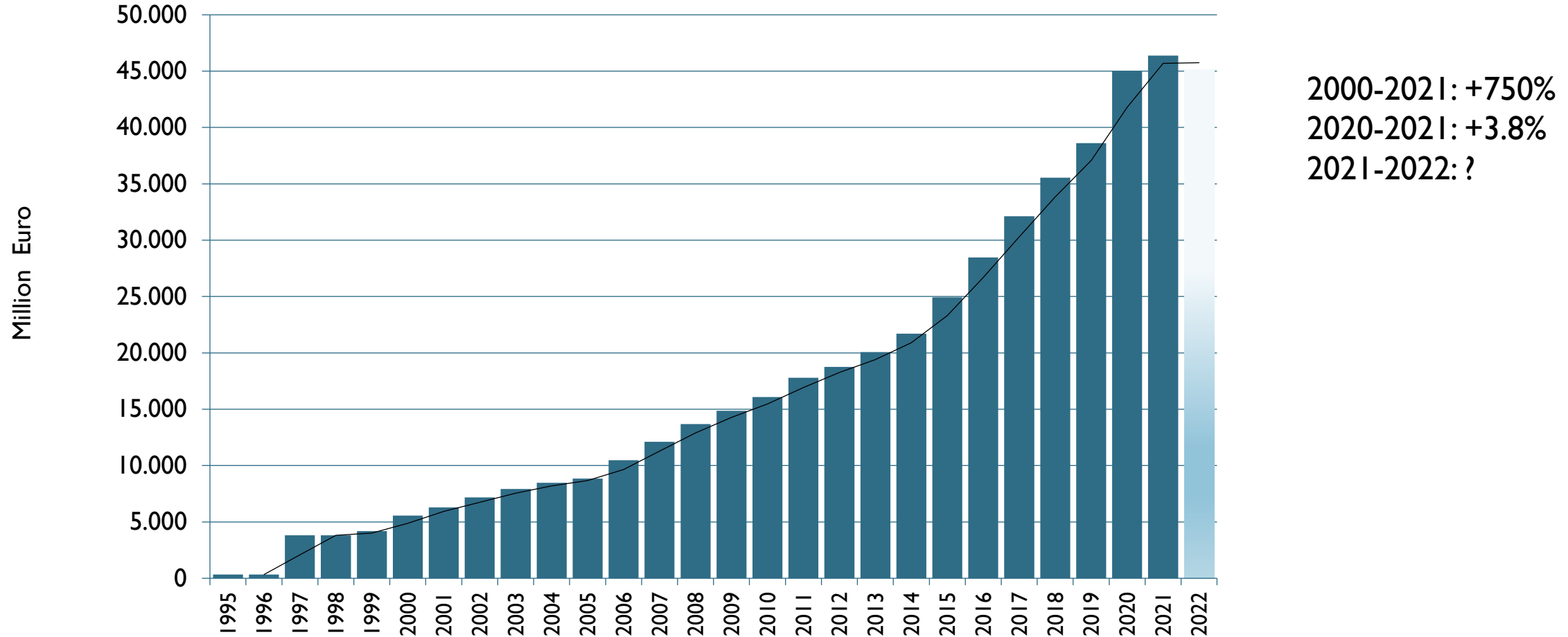
European Union: Organic market shares 2022

Source: FiBL AMI survey 2023



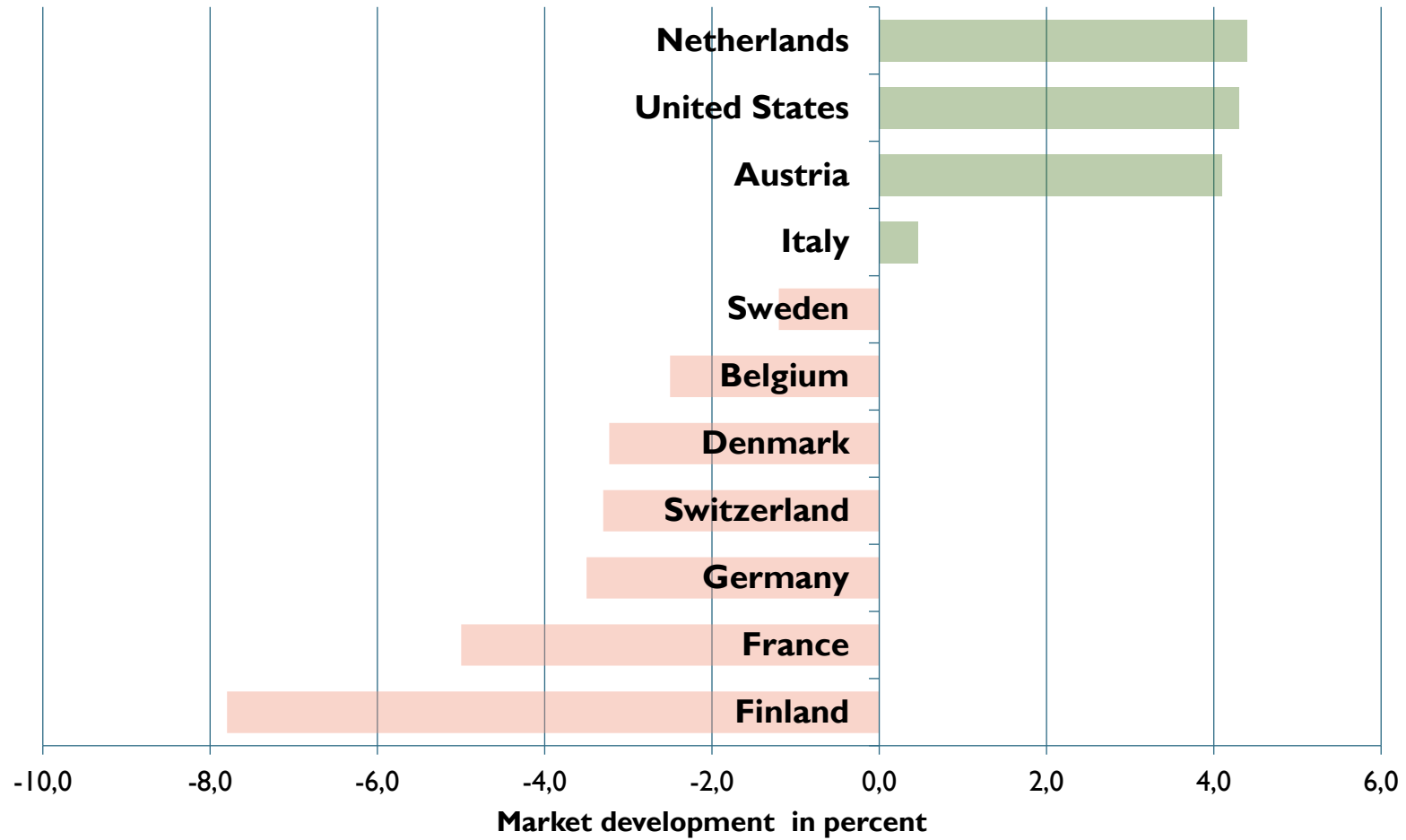
Development of the EU organic retail sales 1995-2022

Source: FiBL AMI survey 2023



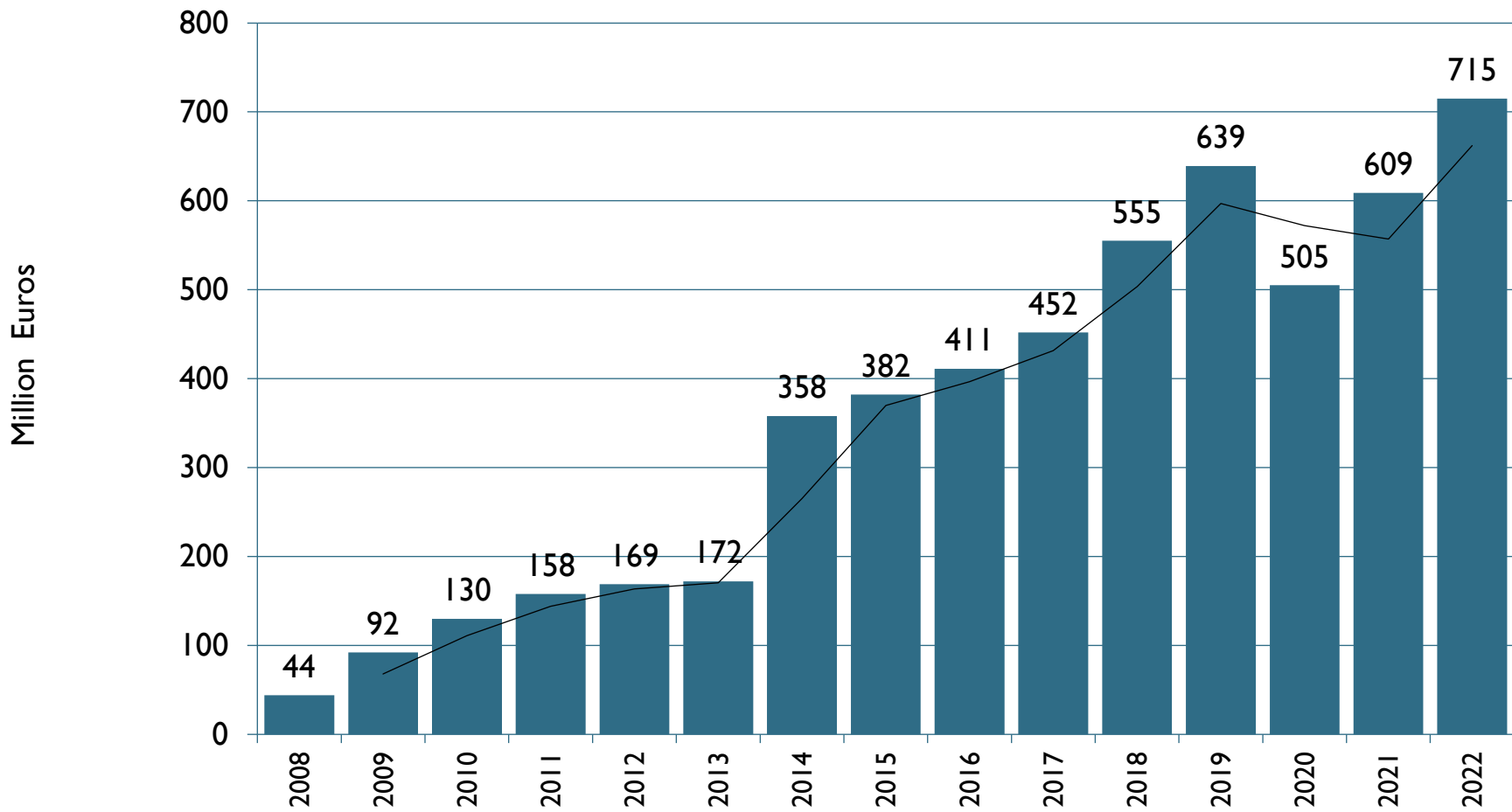
Market development 2022 in select countries

Source: FiBL AMI survey 2023



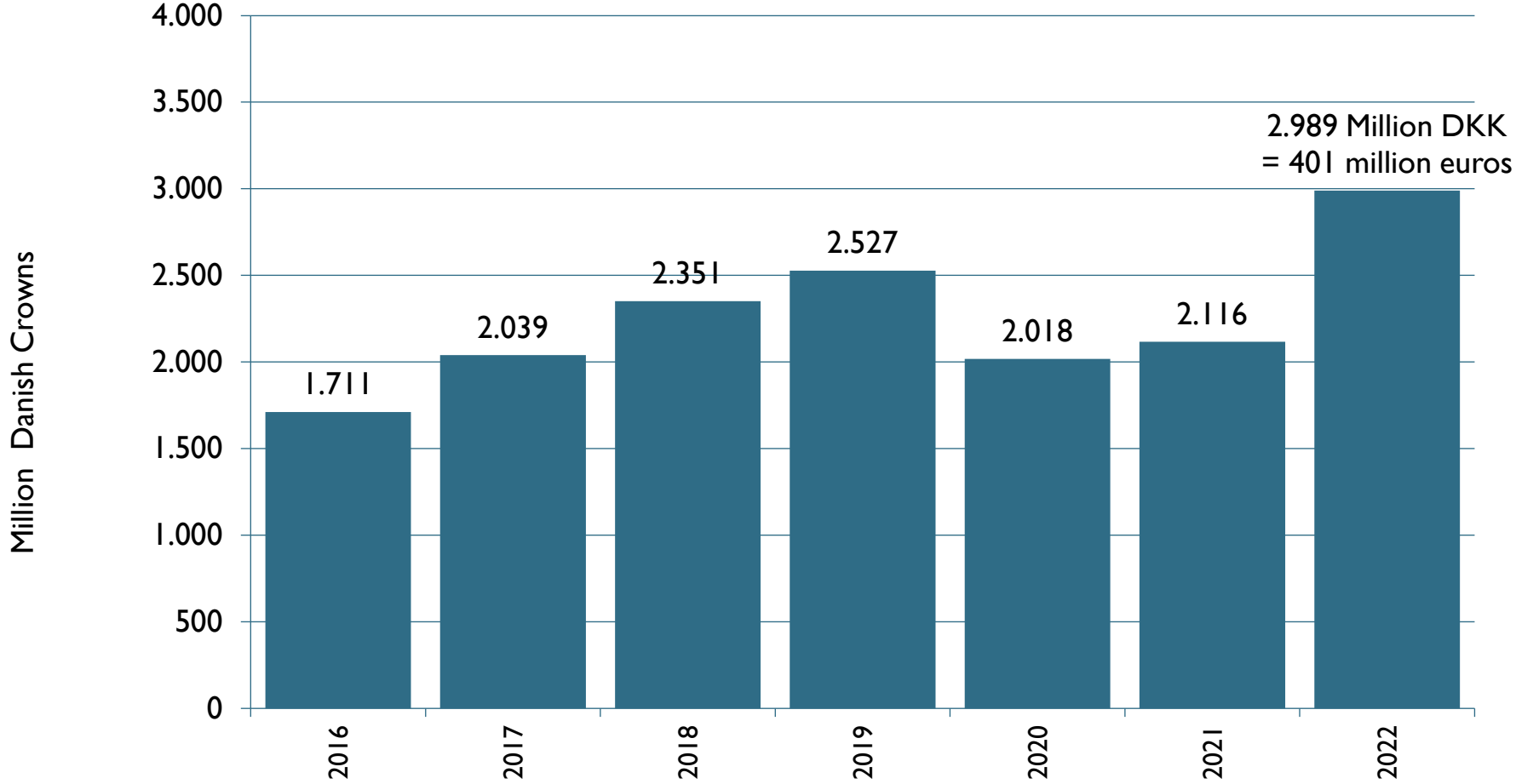
Development of food service/Restaurants in France

Source: Agence Bio



Development of food service in Denmark (in Danish Crowns)

Source: Statistics Denmark



Market trends Europe 2022

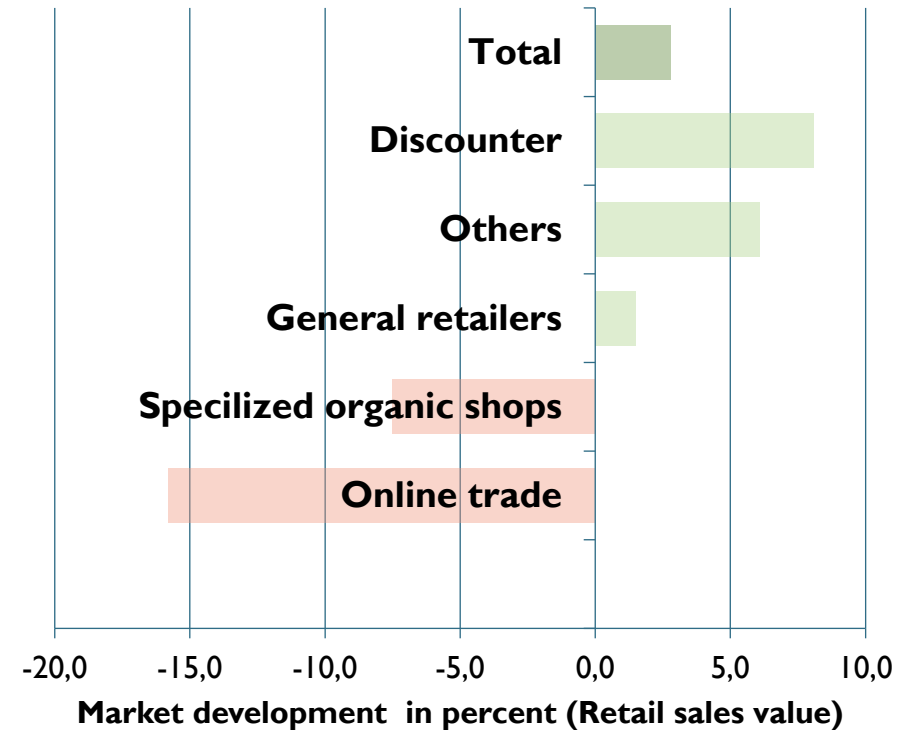
- After two successful years, the organic markets experienced stagnation or even decline in 2022, with some signs of recovery noted in 2023.
- During 2022, the cost of living surged in many countries, with inflation reaching unprecedented levels of 10 percent or more in the latter half of the year.
- As a result, certain population groups reduced their spending on organic products.
- While people's awareness of organic, environmental, and health issues remained strong, individuals were increasingly seeking ways to obtain organic products at lower prices.
- For instance, in Germany, this shift was evident in the sustained growth of organic products within discount retailers.
- Many processing companies faced challenges during this period, and some even went bankrupt

And what about 2023? Here some data from Germany

- › Spending on fresh organic food has been on the rise since the start of the second half of 2023.
- › Data shows an increase in retail sales from January to September 2023 by 2.8% compared to the previous year.
- › Discounters continue to be the shopping outlets with the highest retail sales growth.
- › In terms of purchasing volume, there is still a minus compared to the previous year (-1.8 %).

Market development 2023 in Germany (Jan – September)

Source: FiBL AMI survey 2023



Conclusion

- In 2021, the organic **farmland area** experienced faster growth (+8%) compared to previous years. However, achieving the 25% goal set by the farm-to-fork strategy requires even higher growth rates and increased efforts.
- Following modest growth (+3.8%) in 2021, **organic retail sales** stagnated or even declined in 2022 in many countries. Factors contributing to this trend included inflation and higher food prices. Simultaneously, there was a notable increase in food service sales (in countries where data is available).
- Concurrently with the retail sales situation, **organic imports** to the EU declined by 5% in 2022 (compared to +2.8% in 2021). Feedstuffs continued to be a significant product category, while tropical fruit faced challenges due to competition from other labels and changes in EU organic regulations.
- To sustain and foster growth, the sector must address current challenges, including: the rise of the vegan trend, concerns related to planetary health, increasing prices, the need to adapt marketing strategies to better meet consumer needs, the growing emphasis on local and regional products, competition from other labels, and the pressing climate challenge.

Kontakt

- Research Institute of Organic Agriculture FiBL
Ackerstrasse 113, 5070 Frick, Schweiz
Tel. +41 79 218 0626
helga.willer@fibl.org
www.fibl.org, www.organic-world.net, <https://statistics.fibl.org>
- Helga Willer, Bernhard Schlatter und Jan Trávníček (Eds.) (2023)
The World of Organic Agriculture. Statistics and Emerging Trends 2023.
Forschungsinstitut für biologischen Landbau FiBL, Frick, and IFOAM – Organics International, Bonn
<http://www.organic-world.net/yearbook/yearbook-2023.html>

Ressources

- Organic-World.net: Yearbook «The World of Organic Agriculture»
- Statistics.FiBL.org: Interaktive database and infographics
- www.Twitter.com/FiBLStatistics: FiBL Twitteraccount