Research Institute of Organic Agriculture FiBL
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Challenges and Opportunities for the Organic Supply Chains

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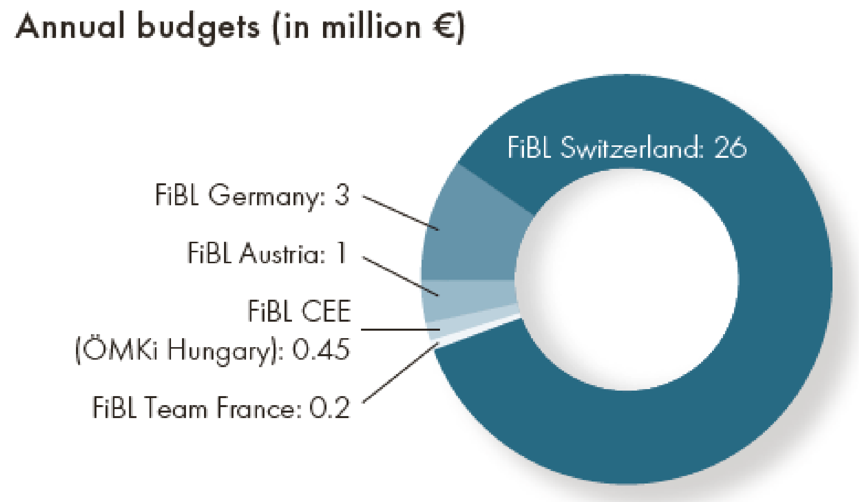
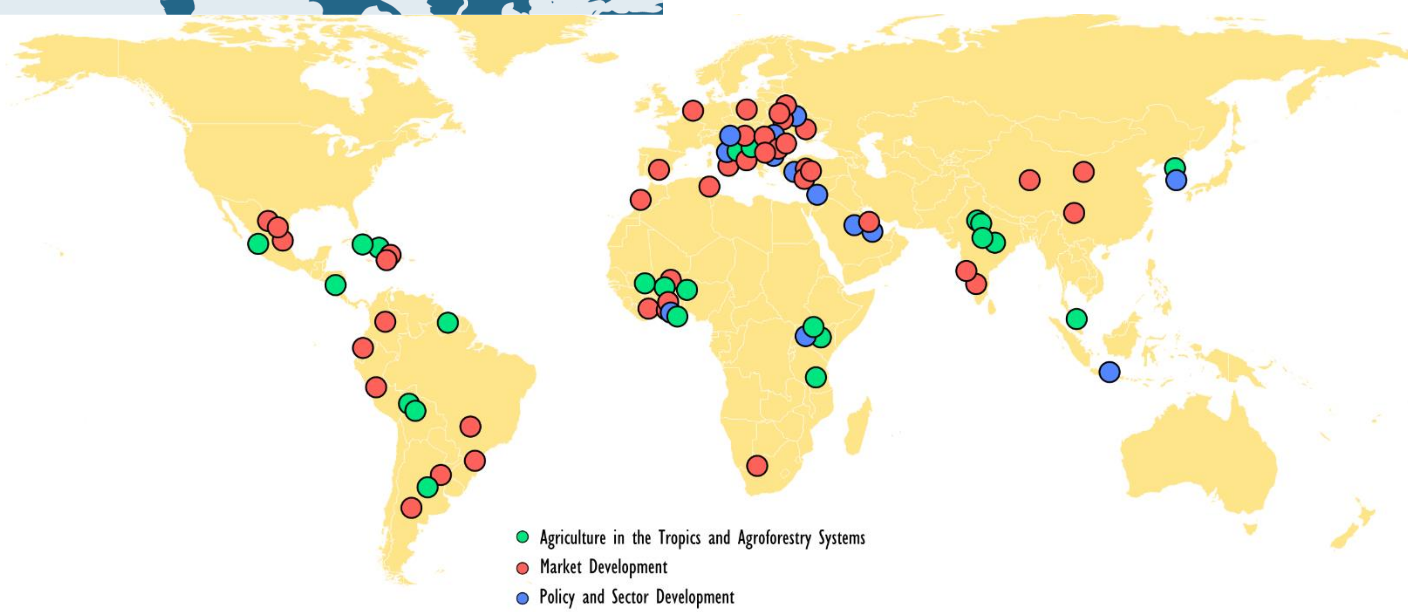
15 September 2022

ENRD Thematic Group Organic Supply Chains

FiBL – Research for Organic Agriculture since 1973





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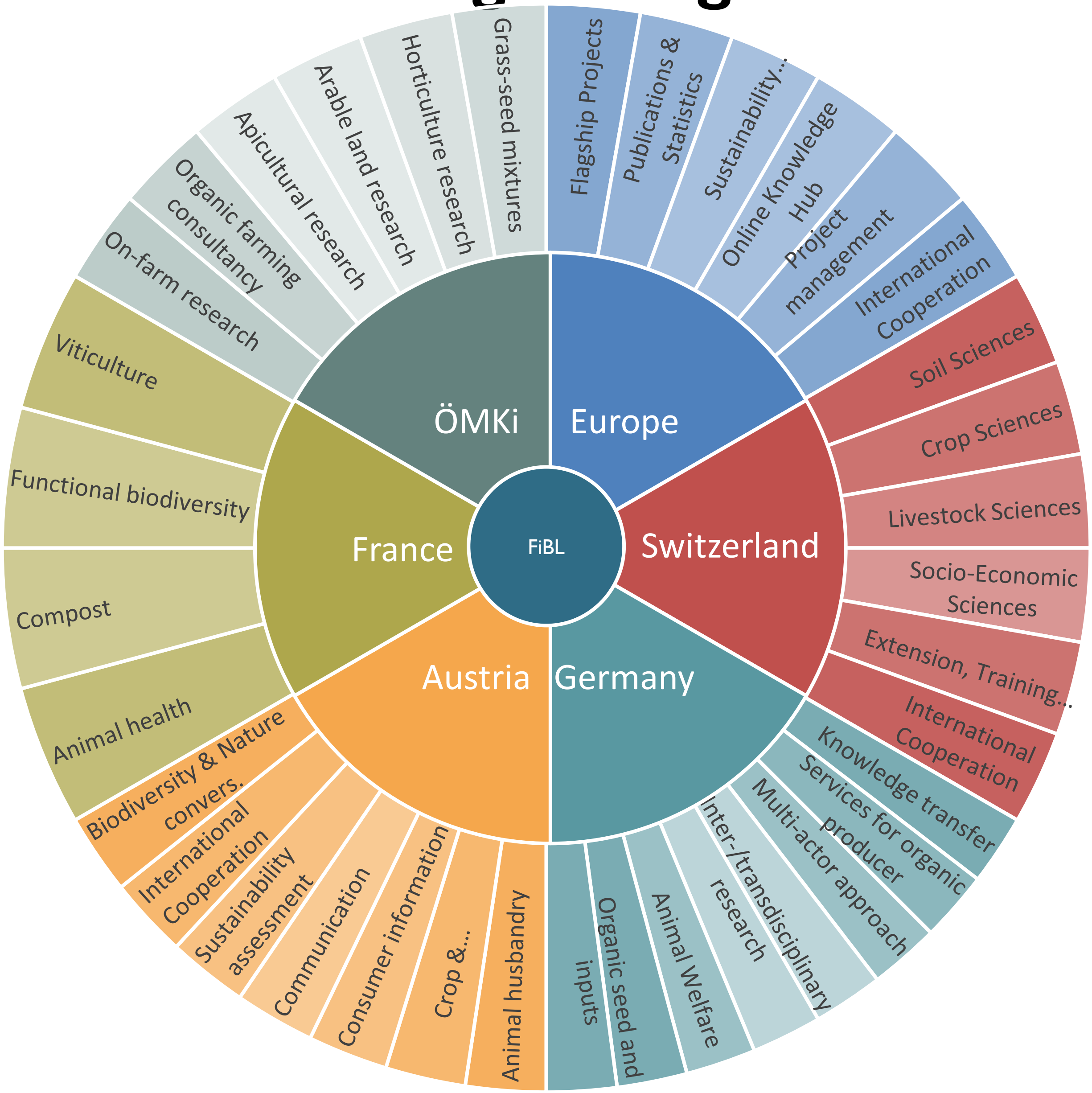

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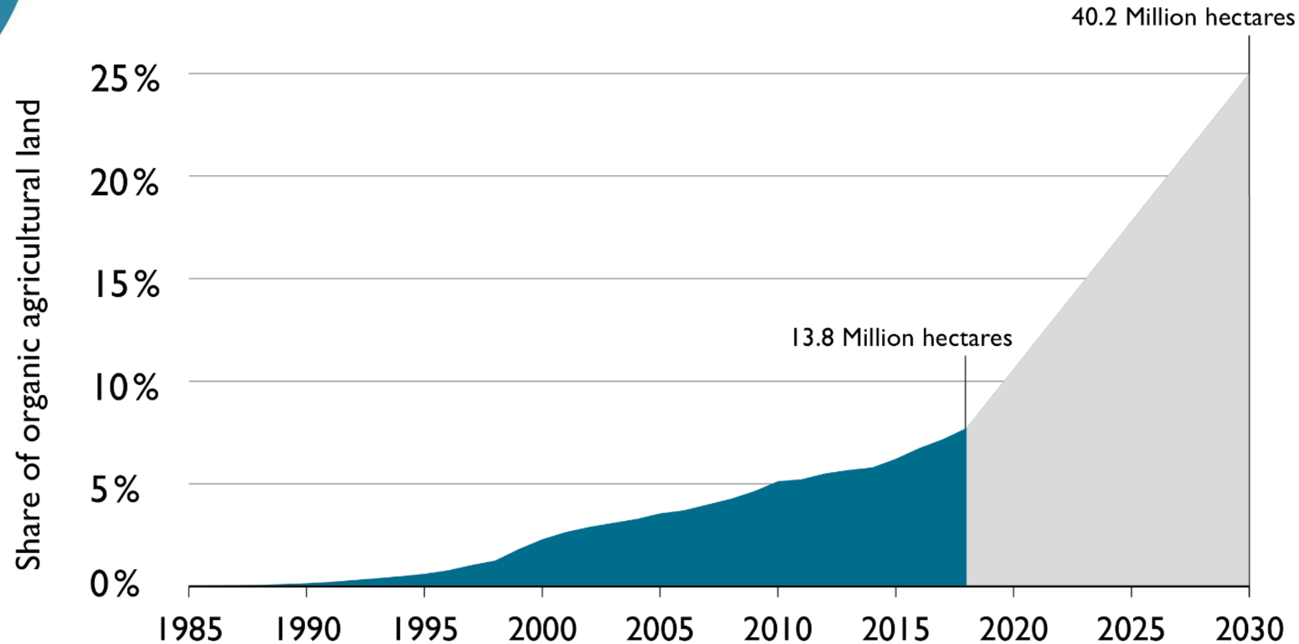
Challenges and Opportunities: The EU Organic Market

Ambitious targets of the F2F strategy

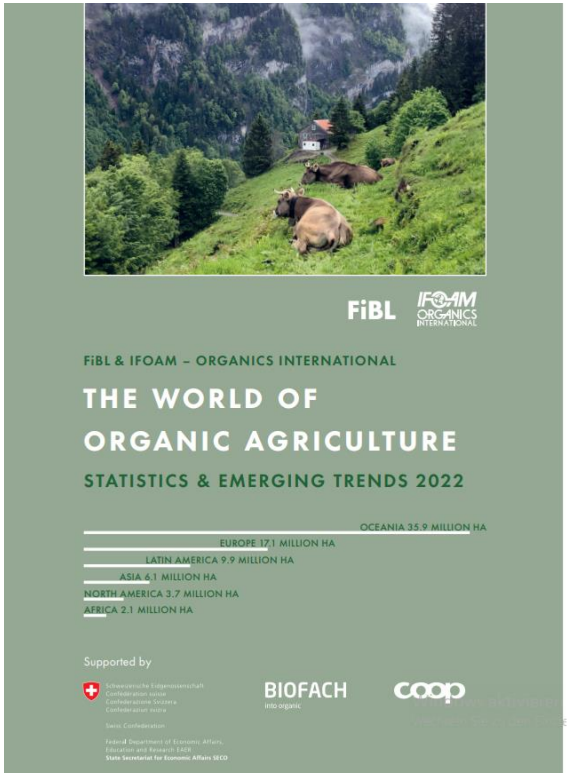
25% organic until 2030



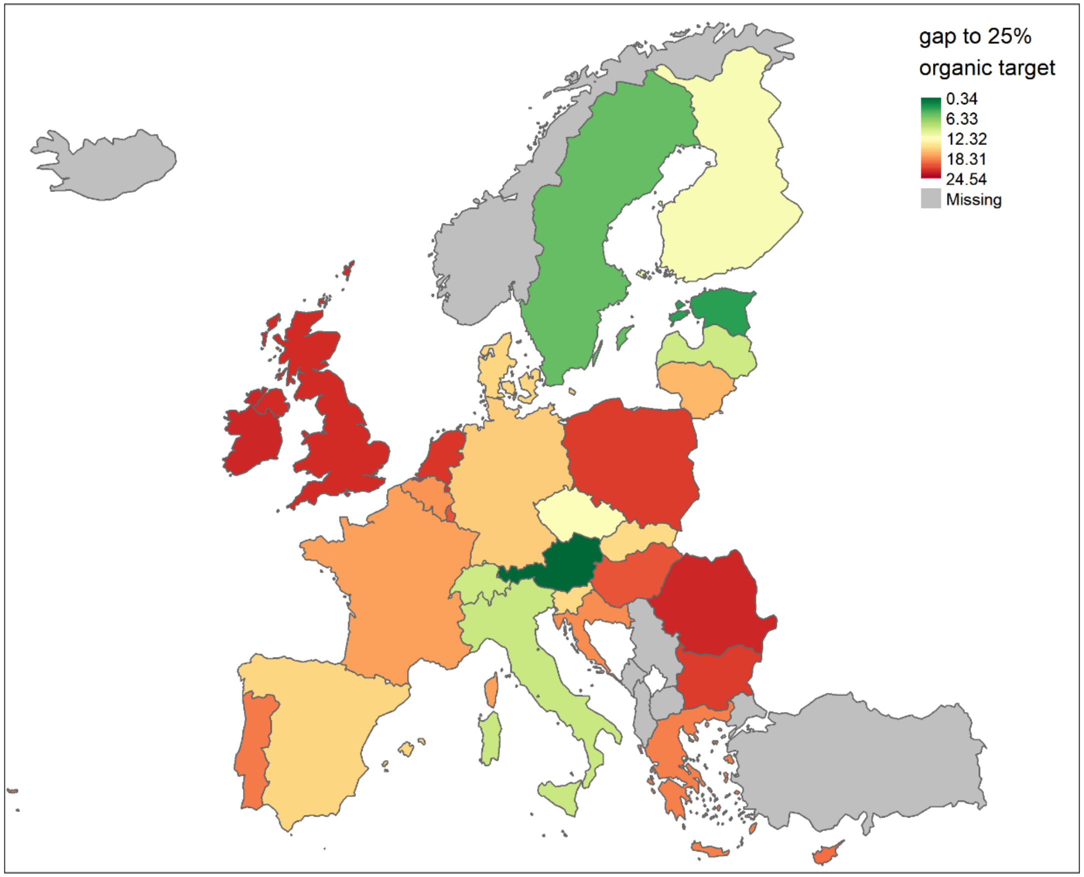
The World of Organic Agriculture 2022
www.organic-world.net

- ›The 23rd edition of «The World of Organic Agriculture», was published by FiBL and IFOAM – Organics International in February 2022.
- ›Data tables and graphs
- ›Country and continent reports
- ›Markets, standards, policy support

- ›The book can be ordered or downloaded at (item number 1344): https://www.fibl.org/en/shop-en

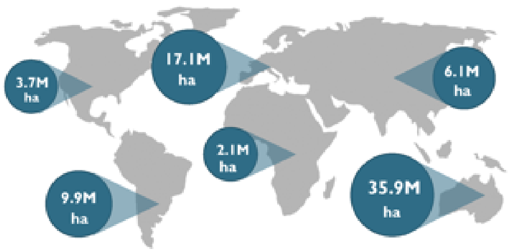


No «one size fits all» - differences between countries



Organic Agriculture Worldwide 2020

Organic Farmland

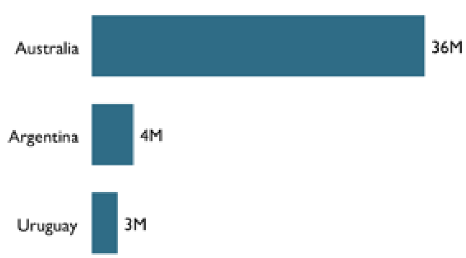


74.9M ha — Organic farmland in million hectares

+4.1% — Growth 2019/2020

190 — Countries with organic farming

Land in million hectares
Top 3 countries



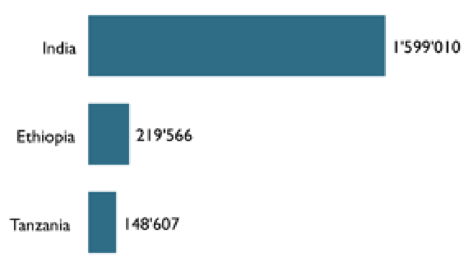
Organic Producers

The number of organic producers is increasing

3.4M — Organic farmers

+7.6% — From 2019

Number of producers
Top 3 countries

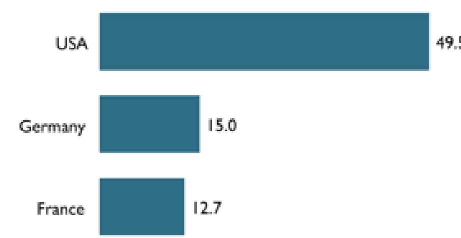


Organic Market

The global market is growing and consumer demand is increasing

Over 120.6 — Global organic food market in billion euros

Market in billion euros
Top 3 countries



Market growth in percent
Top 3 countries

Source: FiBL survey based on national sources

More information: www.organic-world.net - statistics.fibl.org

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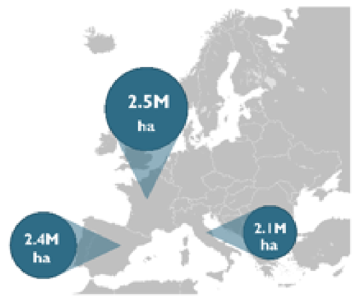
Organic Agriculture in the European Union 2020

Organic Farmland



14.9M ha — Organic farmland in million hectares

+5.3% — Growth 2019/2020

9.2% — Organic share of total farmland

Land in million hectares
Top 3 countries

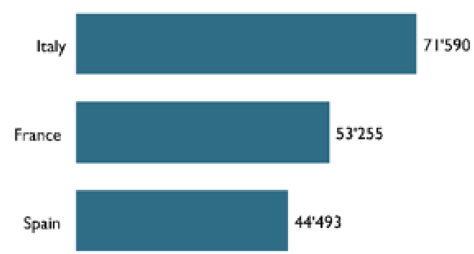
Organic Producers

The number of organic producers is increasing

349'499 Organic producers

78'262 Organic processors

Number of producers
Top 3 countries



Organic Market

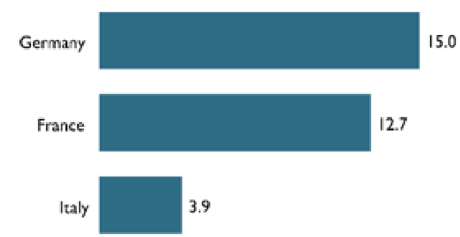
The European Union market is growing

44.8 — European Union´s organic retail sales in billion euros

102 — Per capita spending in euros

15.1% — Organic market growth

Market in billion euros
Top 3 countries



Market growth in percent
Top 3 countries

Source: FiBL survey based on national sources

More information: www.organic-world.net - statistics.fibl.org

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EUROPE: ORGANIC FARMLAND 2020

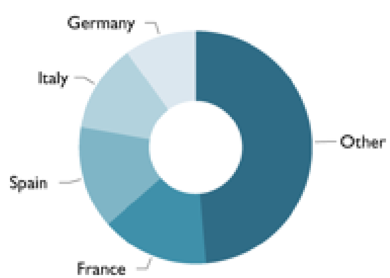
Europe
17.1M
hectares

France
2.5M
hectares

3.4%
of the Europe´s farmland is organic

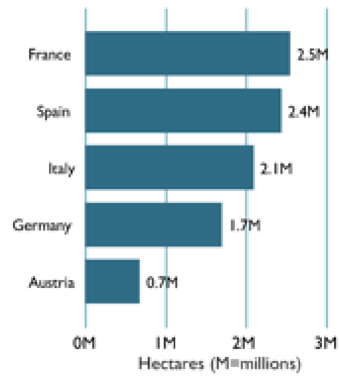
3.7%
growth since 2019

More than half of Europe´s organic agricultural land is in four countries.



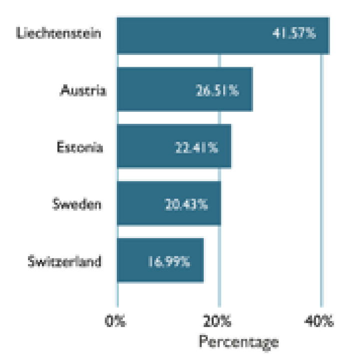
Distribution of organic agricultural land by country 2020.

The country with the largest organic agricultural area is France, followed by Spain and Italy.



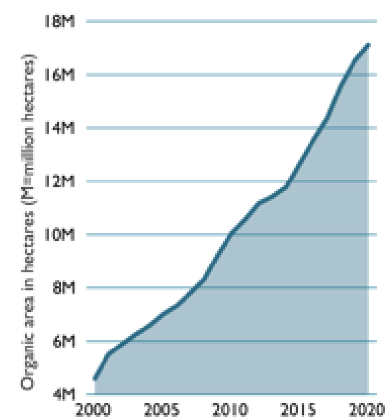
The five countries with the largest areas of organic agricultural land 2020.

15 countries have 10% or more of their agricultural land under organic management.



The five countries with more than 10% of organic agricultural land 2020.

In 2020, nearly 0.7 million hectares more were reported compared with 2019.



Growth of the organic agricultural land 2000-2020.

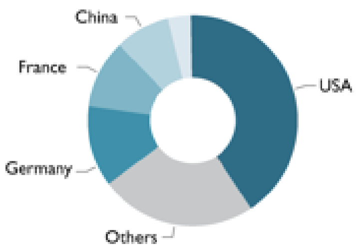
www.fibl.org

Source: FiBL 2022 www.organic-world.net - statistics.fibl.org

EUROPE: ORGANIC RETAIL SALES 2020

Europe
almost
52bn €

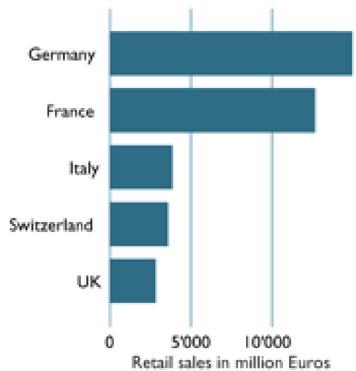
The European Union (44.8 billion €) is the second largest single market after the US (49.5 billion €) and China (10.2 billion €). By region, North America has the lead (53.7 billion €), followed by Europe (52.0 billion €) and Asia (12.5 billion €).



Distribution of retail sales by country 2020.

Germany
15bn €

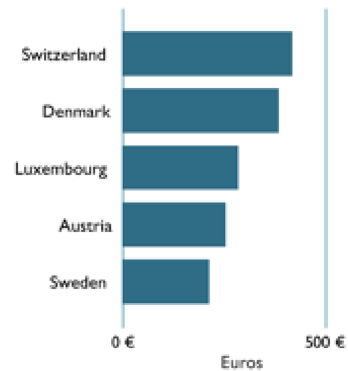
The European countries with the largest markets for organic food are Germany (15 billion €), France (12.7 billion €), Italy (3.9 billion €) and Switzerland (3.6 billion €).



The five countries with the largest markets for organic food in 2020.

418 €
is spent per person in Switzerland

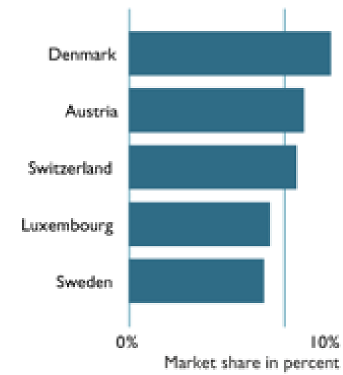
Switzerland has the highest per capita consumption worldwide, followed by Denmark, Luxembourg, Austria and Sweden.



The five countries with the highest per capita consumption 2020.

13.0%
of the food market in Denmark is organic

The highest organic share of the total market is in Denmark, followed by Austria, Switzerland, Luxembourg and Sweden.



The five countries with the highest organic shares of the total market in 2020.

www.fibl.org

Source: FiBL 2022 www.organic-world.net - statistics.fibl.org

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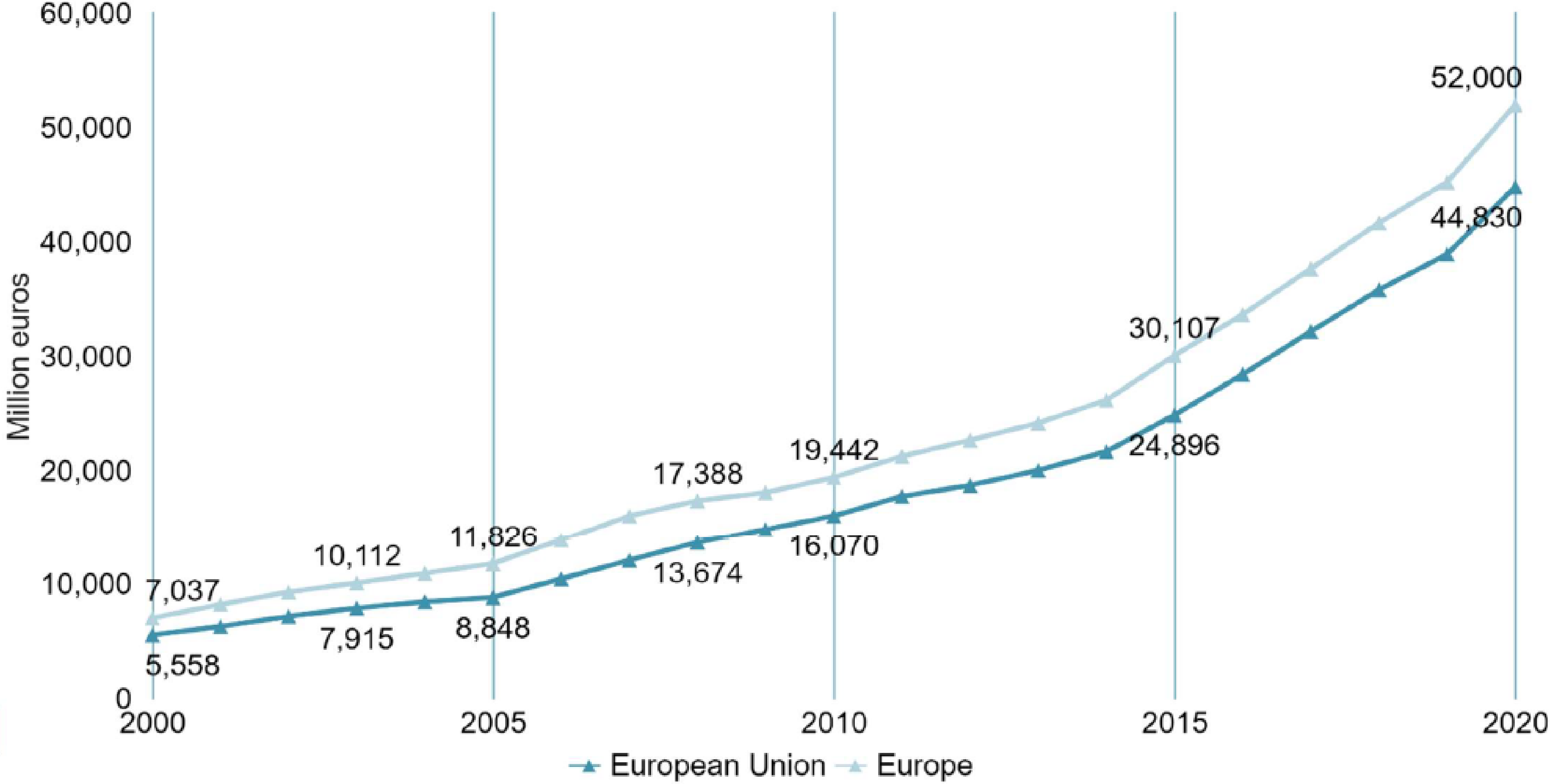
Europe and the European Union: Growth of organic retail sales 2000 - 2020

Source: FiBL-AMI surveys 2001-2022



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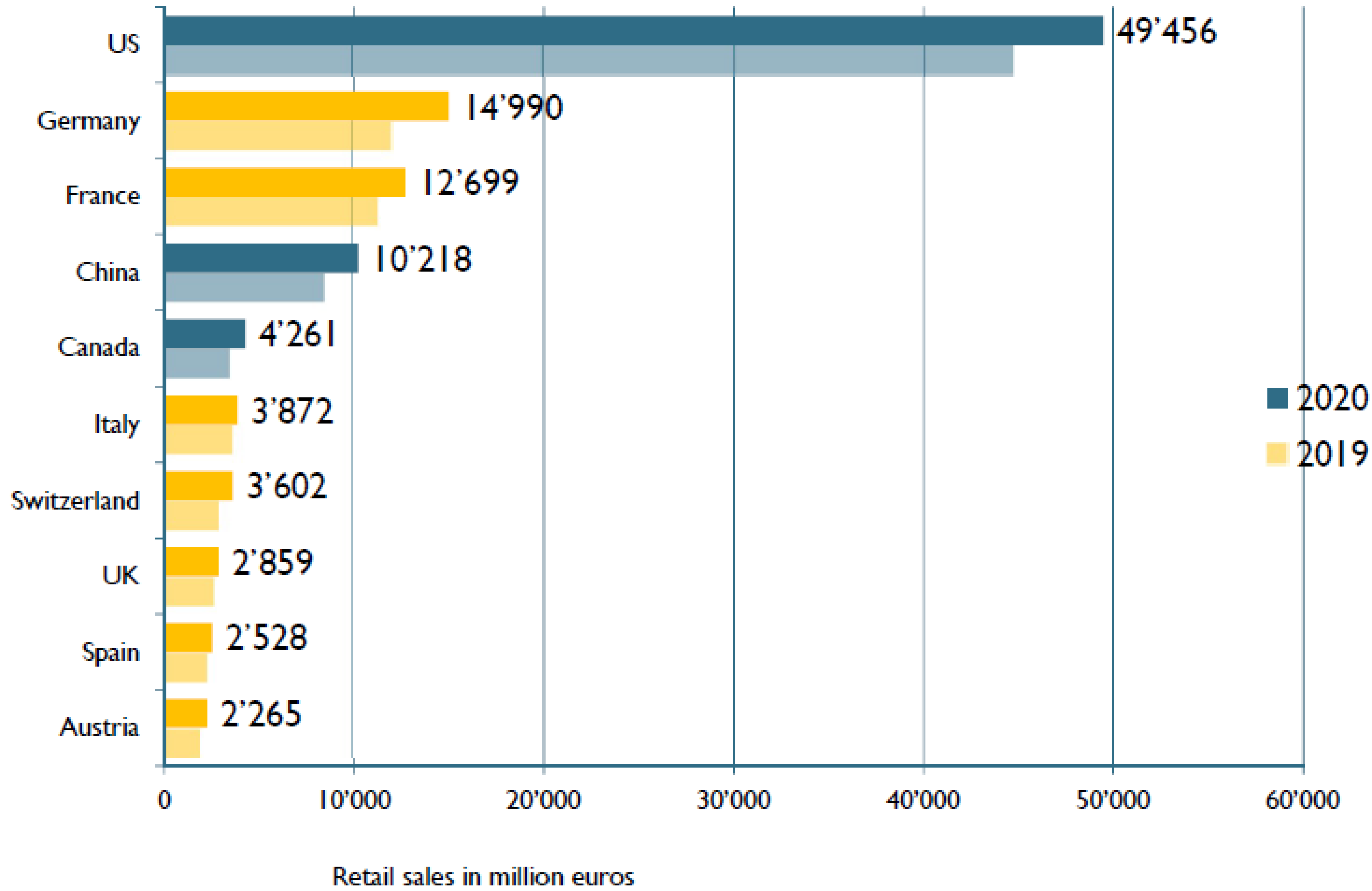
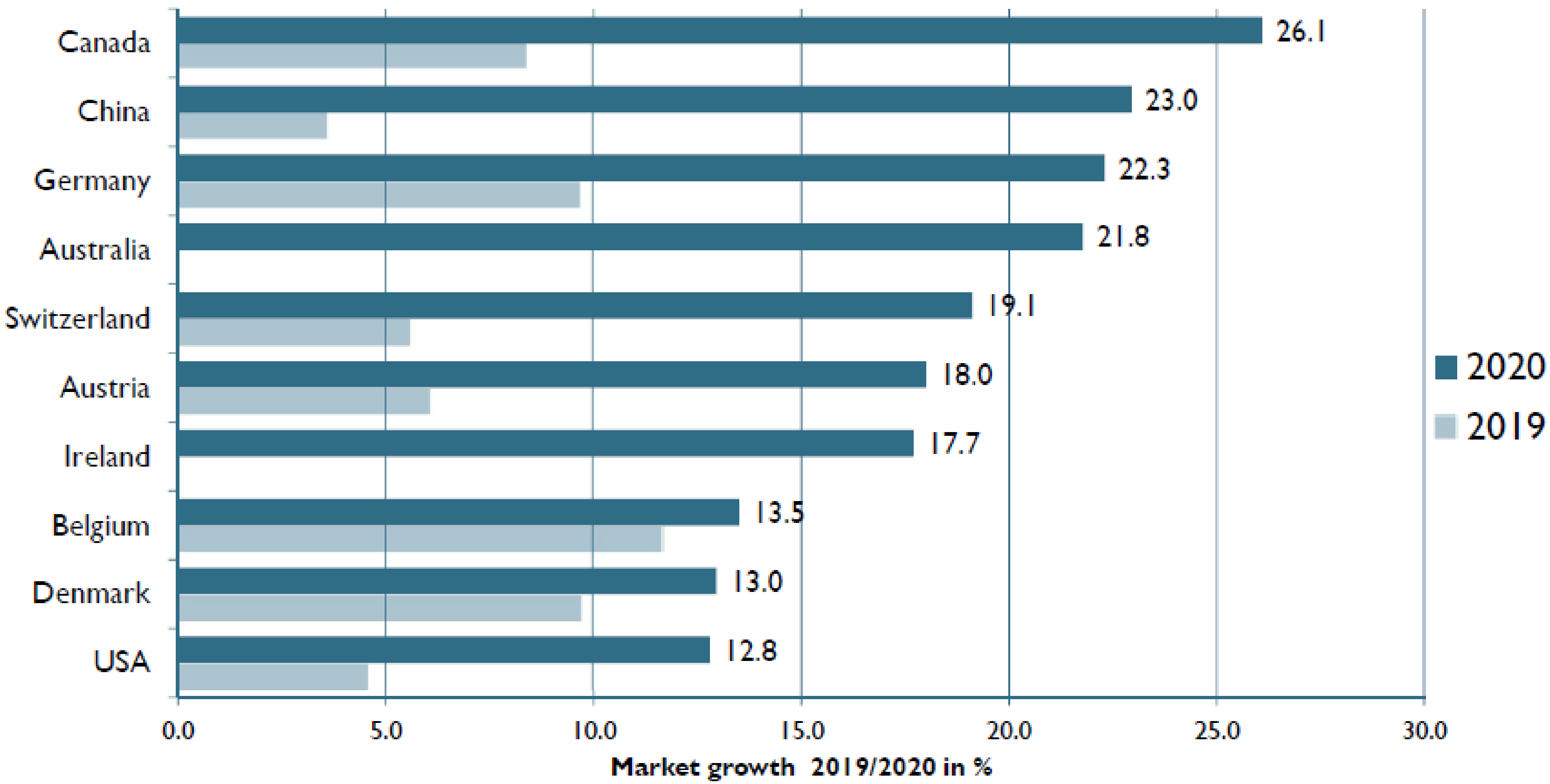
Top 10 organic markets 2019 and 2020

Source: FiBL AMI survey 2022



The ten countries with largest organic market growth 2020

Source: FiBL-AMI-survey 2022



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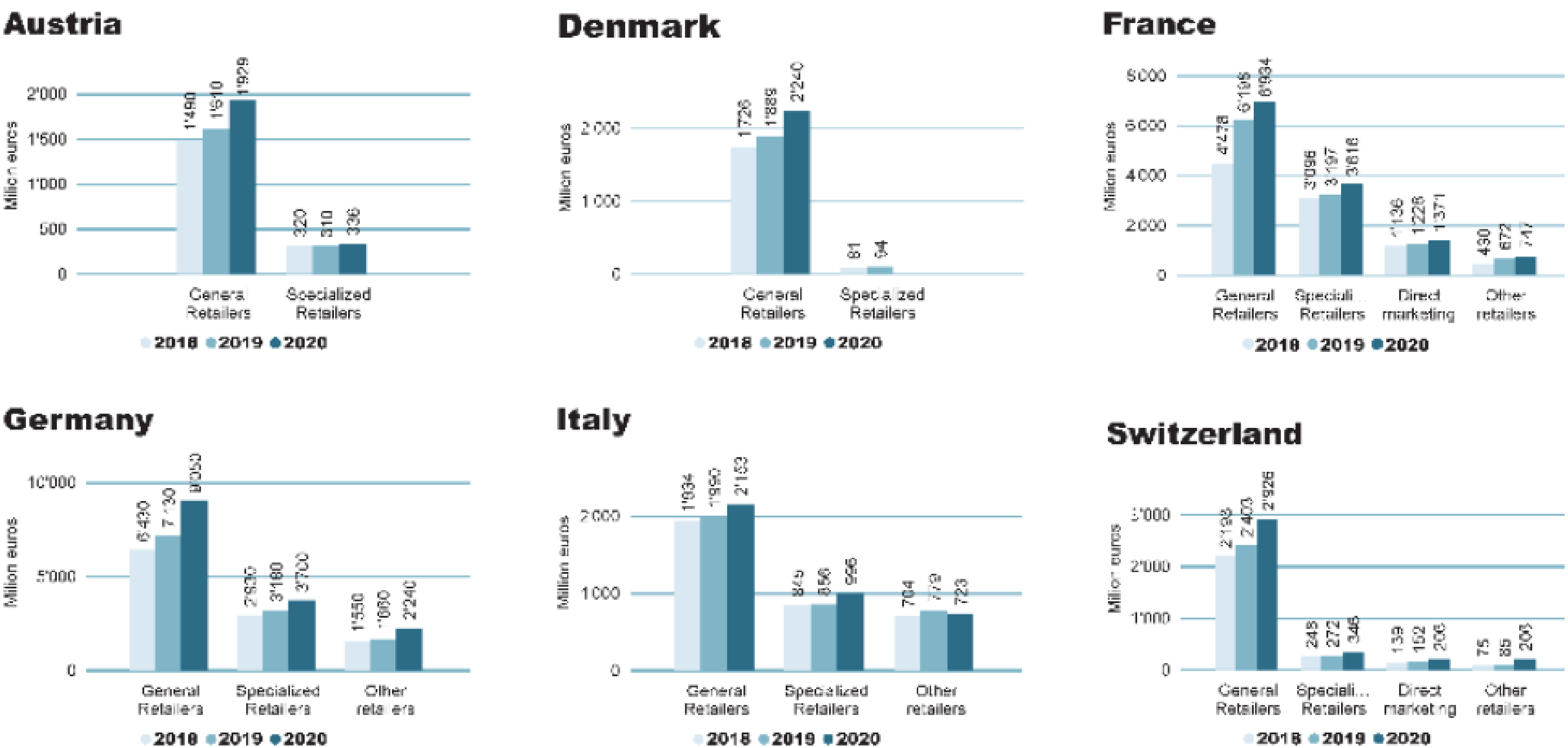
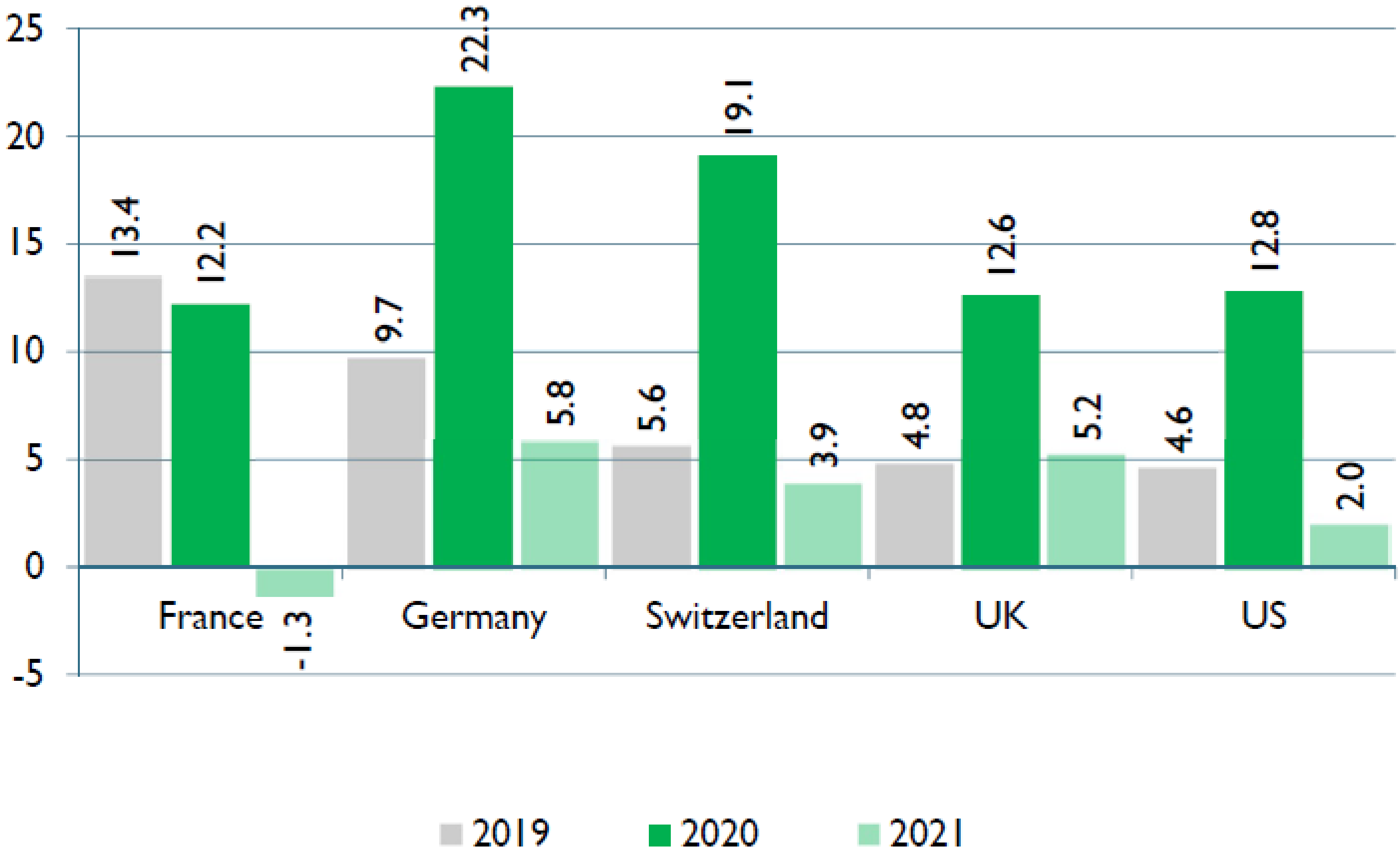
Europe: Growth of marketing channels for organic products 2018 - 2020 in selected countries

Source: Austria: AMA Marketing, Denmark: Organic Denmark/LV, France: Agence Bio, Germany: Arbeitskreis Biomarkt, Italy: AssoBio/Nomisma, Switzerland: Bio Suisse.

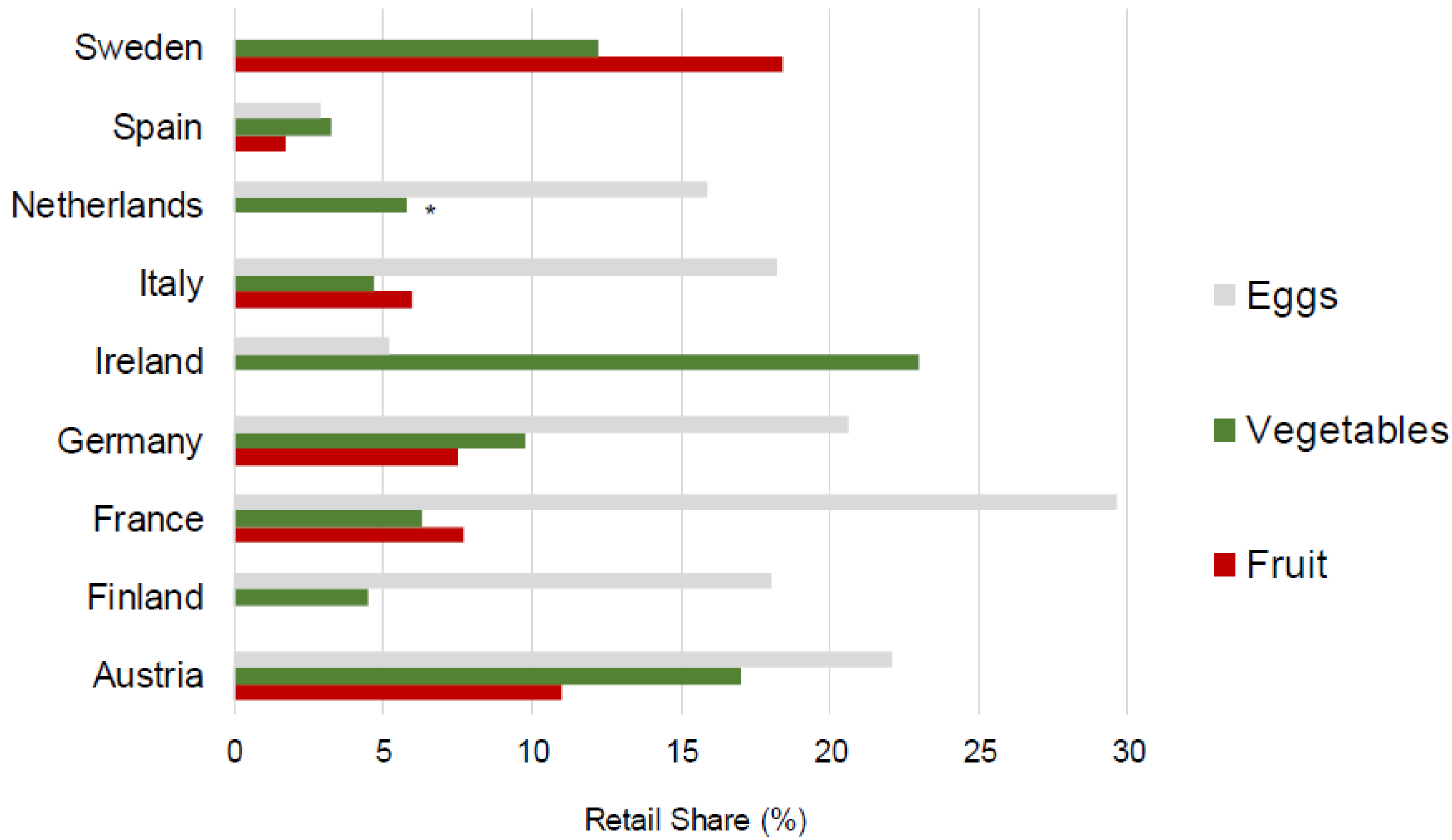


Market growth rates 2019, 2020 and 2021 compared

Source: FiBL-AMI survey 2022



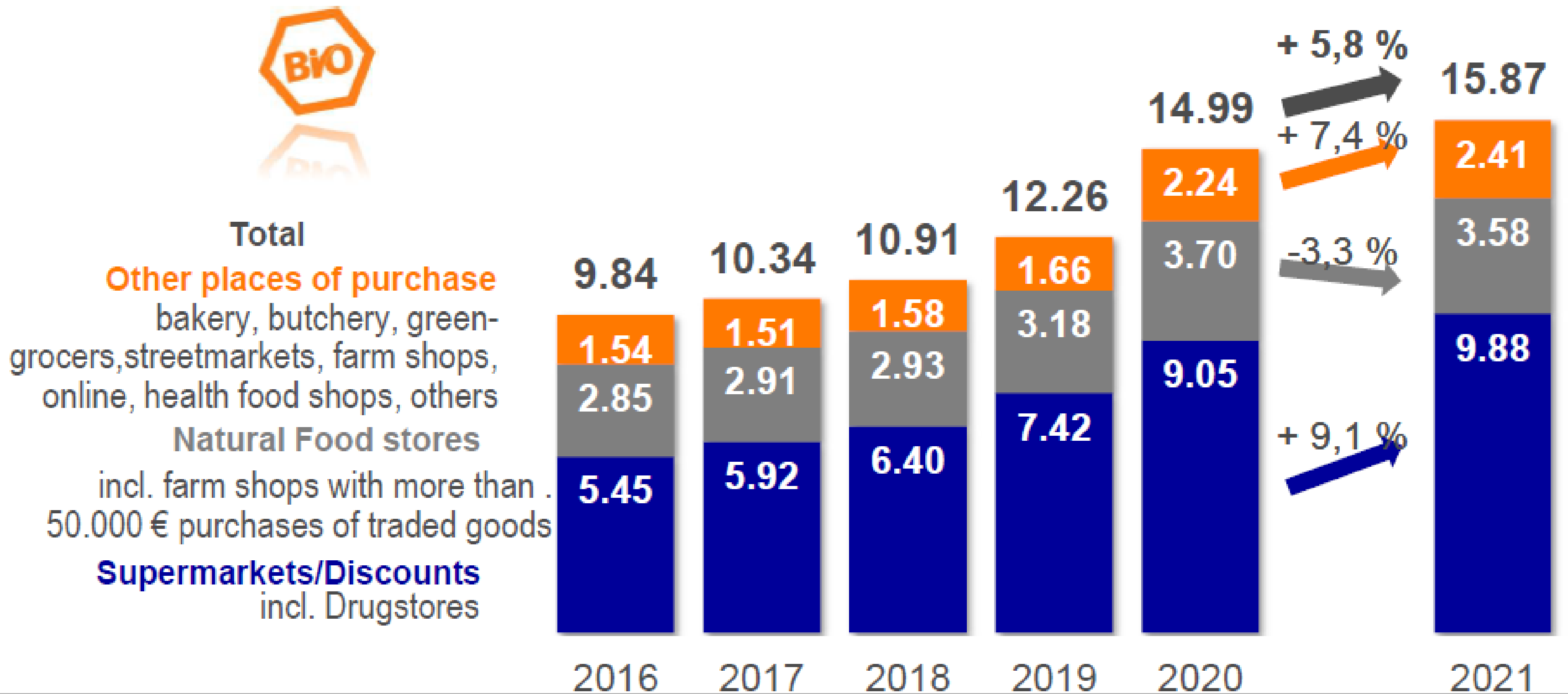
Organic retail sales shares of 3 main categories in different EU countries



** Fruits and Vegetables share*

2021 good Growth after extraordinary Growth in 2020

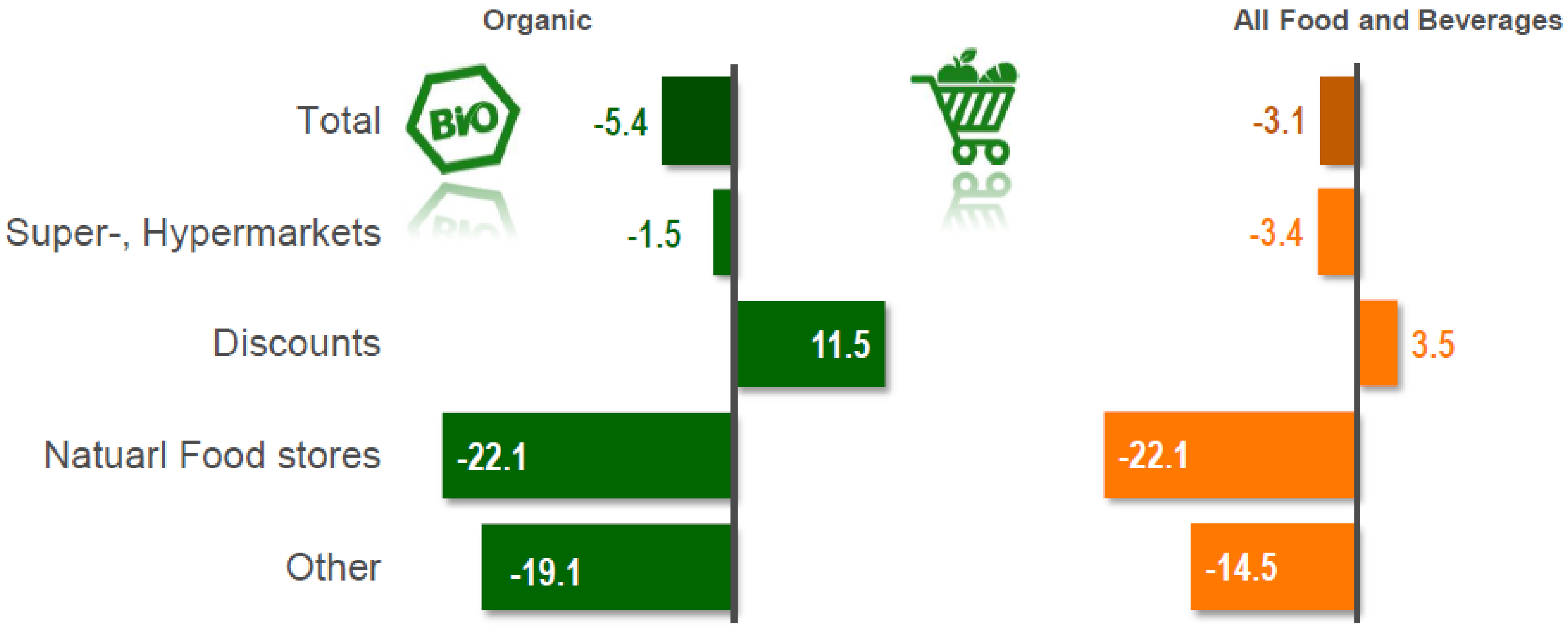
Consumer expenditure for organic food and beverages by place of purchase, Germany, in Billion EUR (excluding out of home consumption)



Source: Arbeitskreis Biomarkt

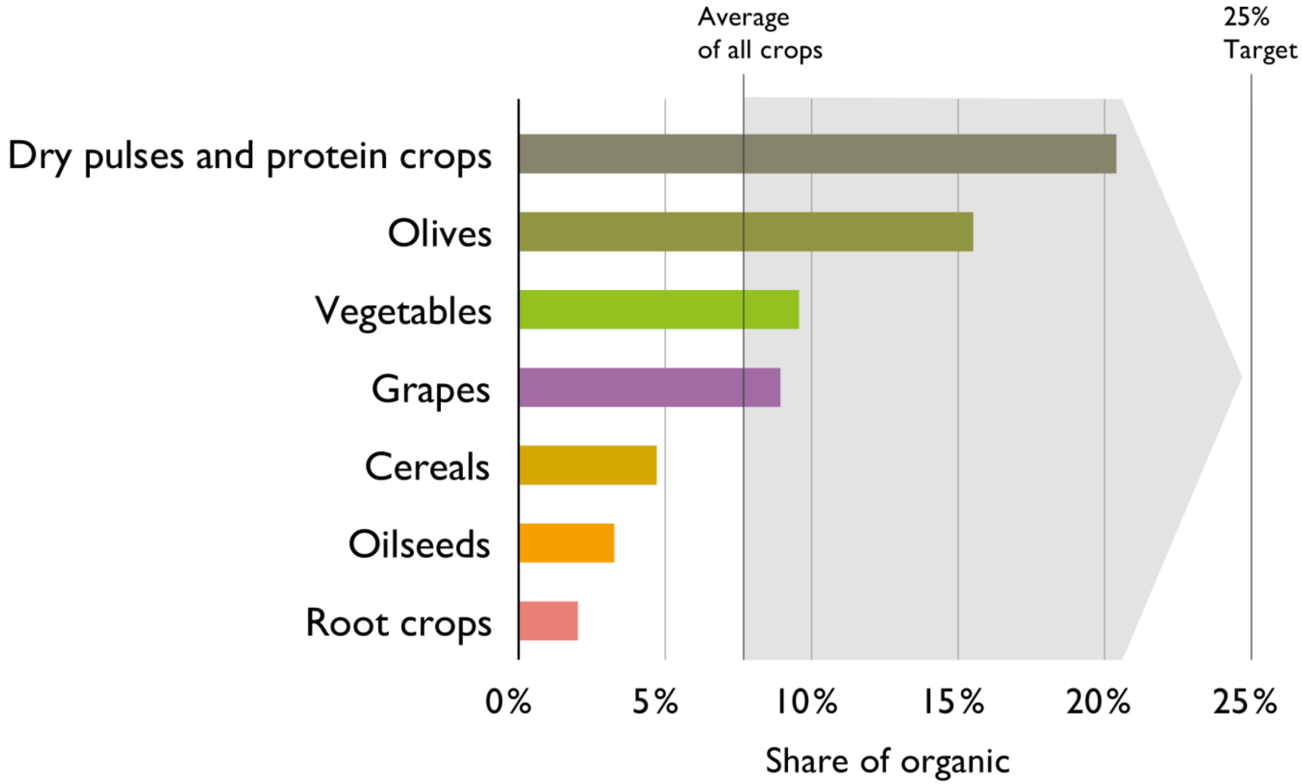
Decreasing retail turnover – also for conventional food

Change of retail turnover with fresh food* - organic and total food, by place of purchase, in %, Jan-June 2022 vs. Jan-June 2021



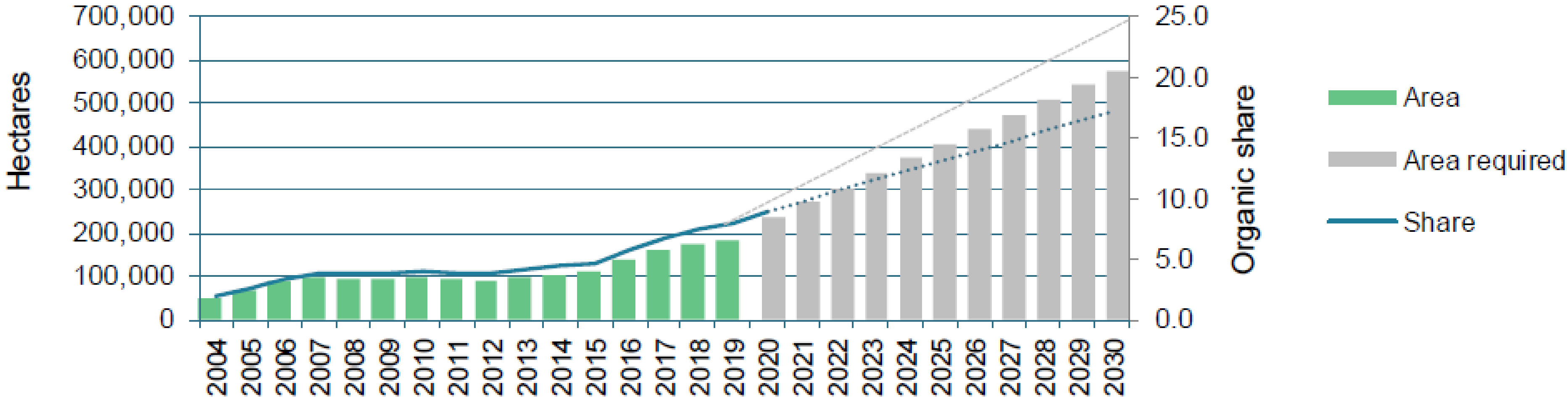
* Meat, Meat Products, Poultry, Eggs, fresh Fruit, fresh Vegetables, Potatoes, Cheese, Bread, Milk and milk products including Butter, Soja- and other plant based Milk substitutes, Oil, Flour etc..

No «one size fits all» - differences between crops

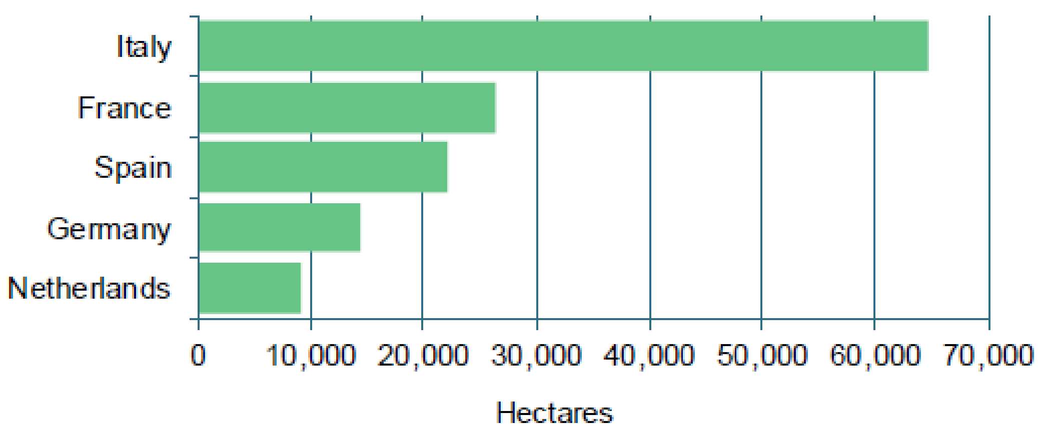


Organic Vegetables

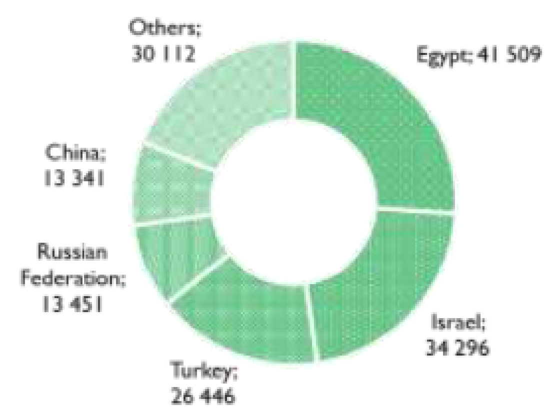
Development of EU organic area 2004-2019
Source: FiBL-IFOAM-SOEL-Surveys 2004-2020



Vegetables: Top 5 countries 2019
Source: FiBL survey 2020

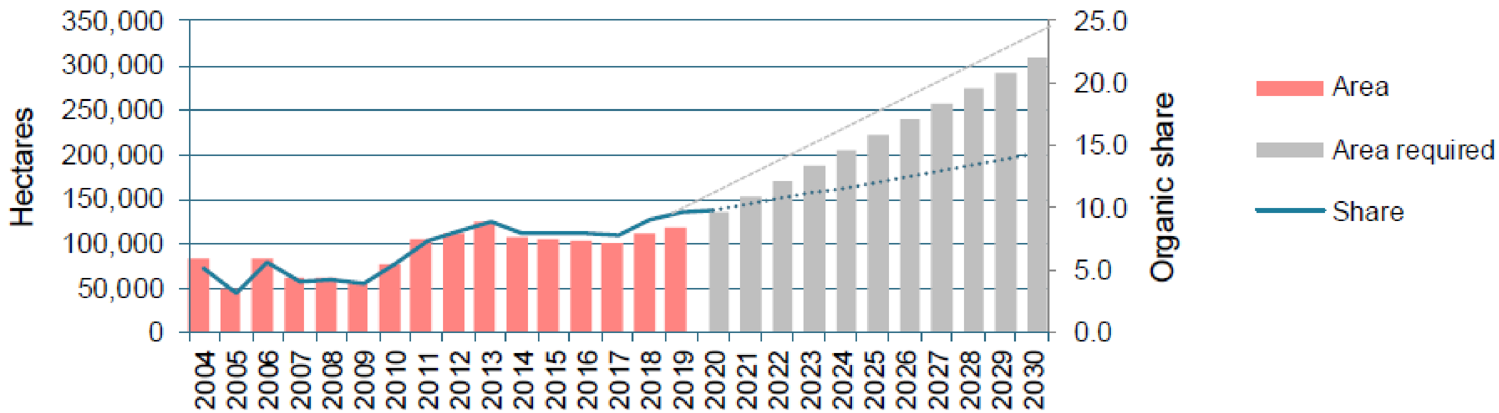


Vegetables: Main exporters to EU 2019 (Mt)

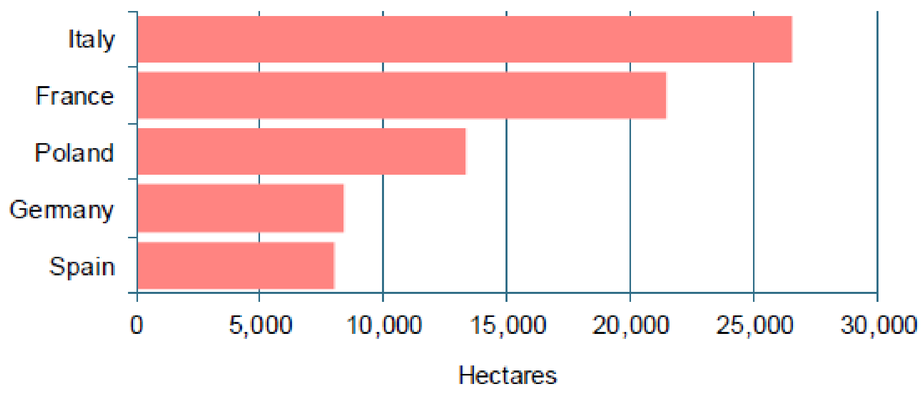


Organic Fruits of Temperate Climate Zones

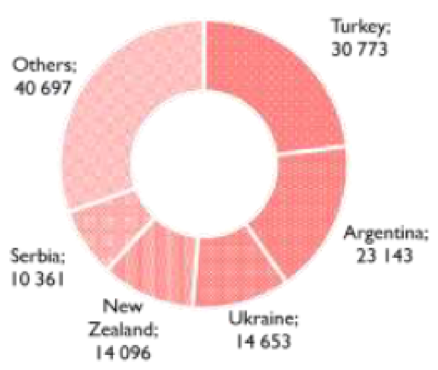
Development of EU organic area 2004-2019
Source: FiBL-IFOAM-SOEL-Surveys 2004-2020



Temperate fruit: Top 5 countries 2019
Source: FiBL survey 2020



Temperate fruit, fresh or dried: Main exporters to EU 2019 (Mt)



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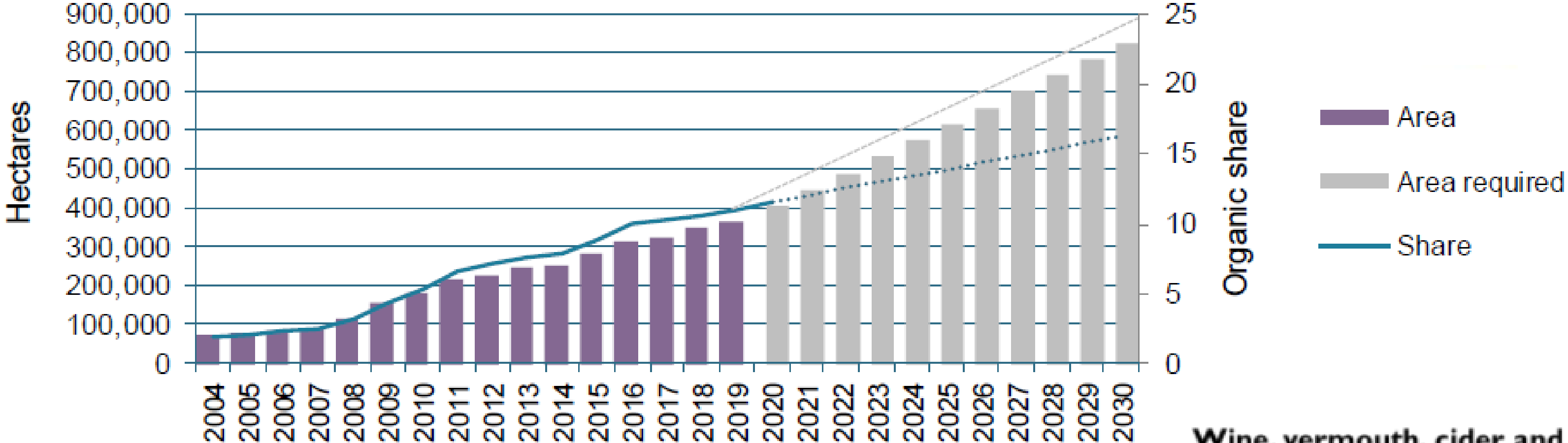
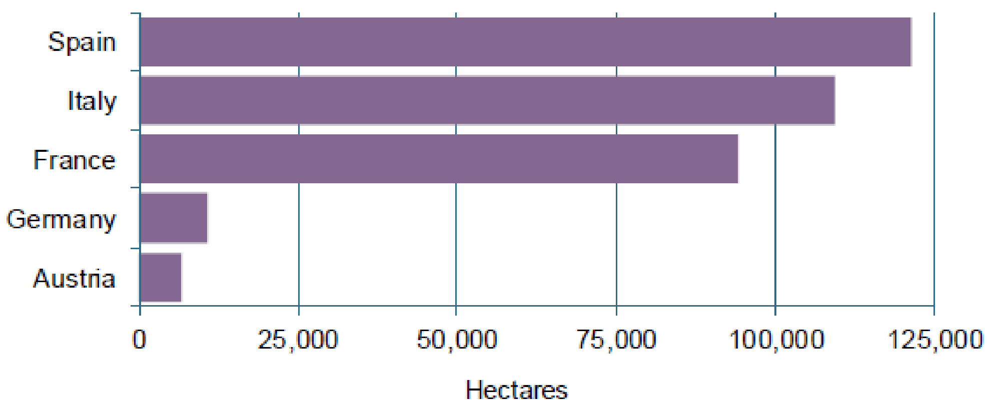
Organic Grapes

Development EU organic area 2004-2019
Source: FiBL-IFOAM-SOEL-Surveys 2004-2020



Wine, vermouth, cider and vinegar: Main exporters to EU 2019 (Mt)

Grapes: Top 5 countries 2019
Source: FiBL survey 2020



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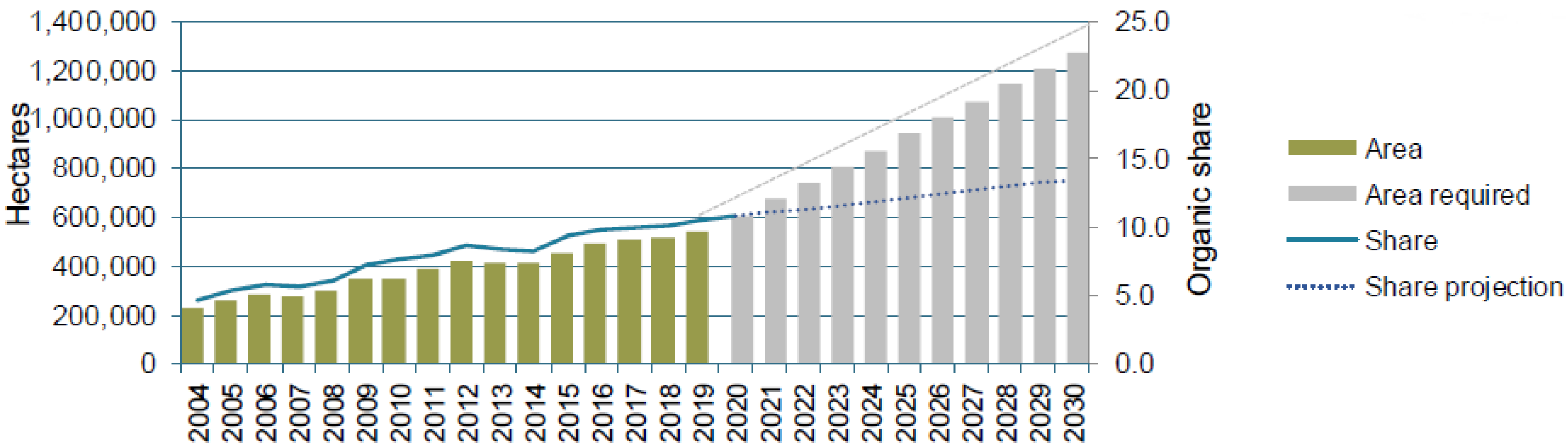
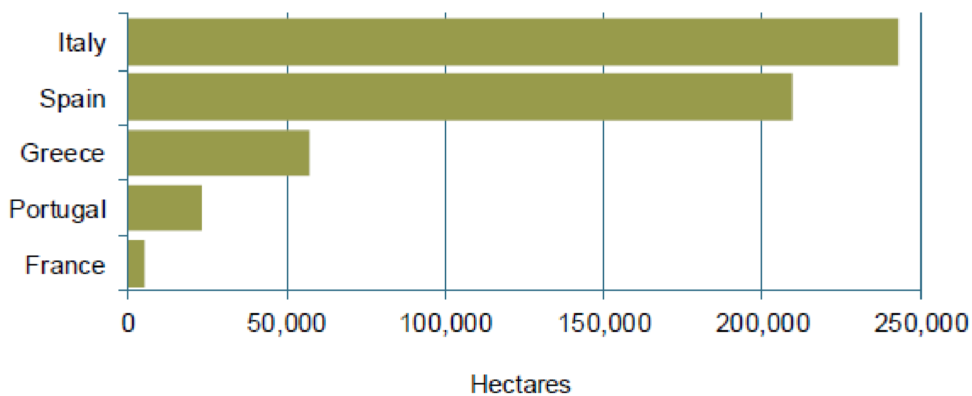
Organic Olives

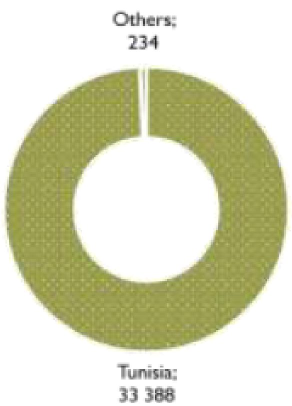
Development of EU organic area 2004-2019
Source: FiBL-IFOAM-SOEL-Surveys 2004-2020



Olives: Top 5 countries 2019
Source: FiBL survey 2020

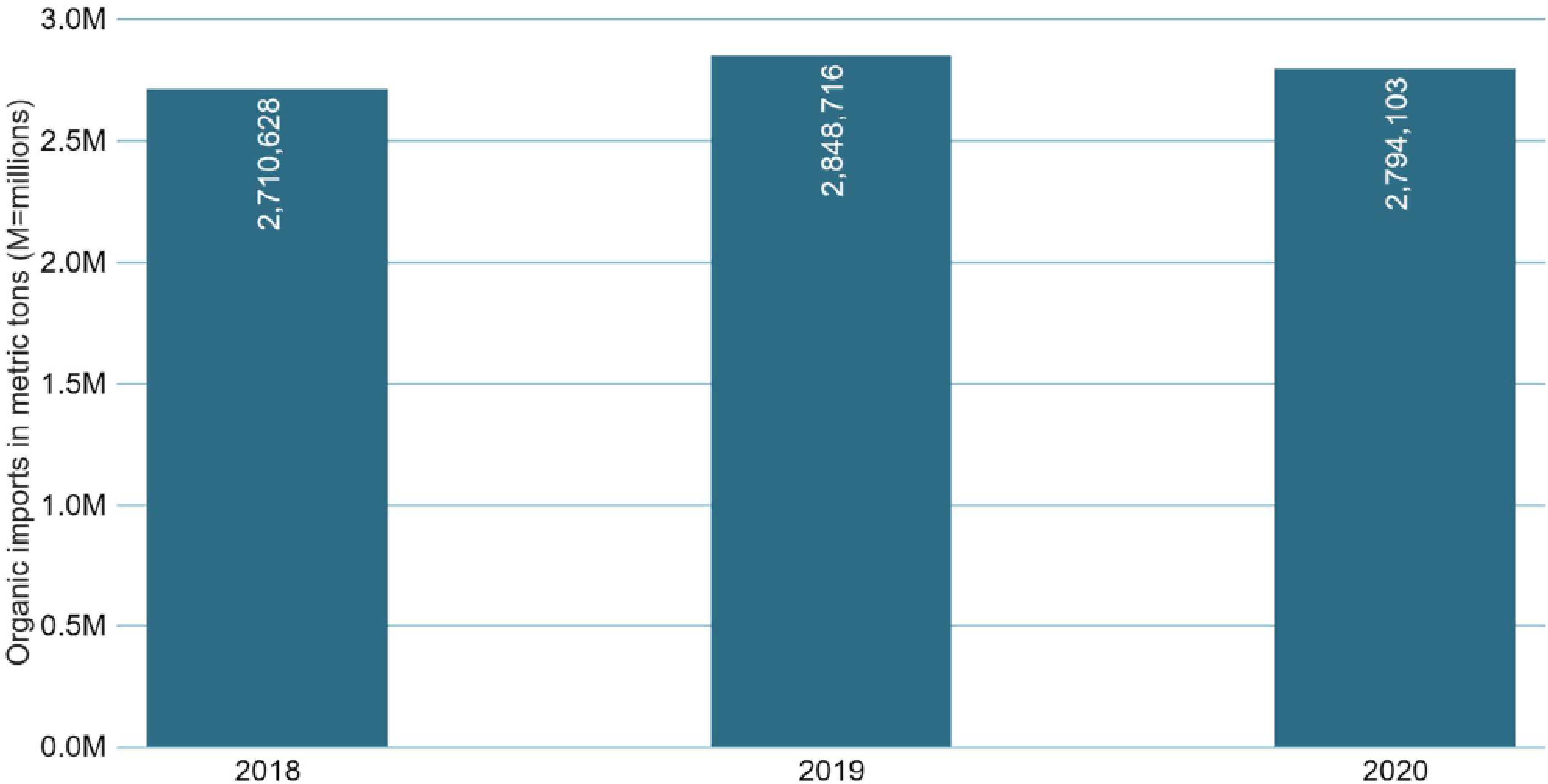


Olives oil: Main exporters to EU 2019 (Mt)



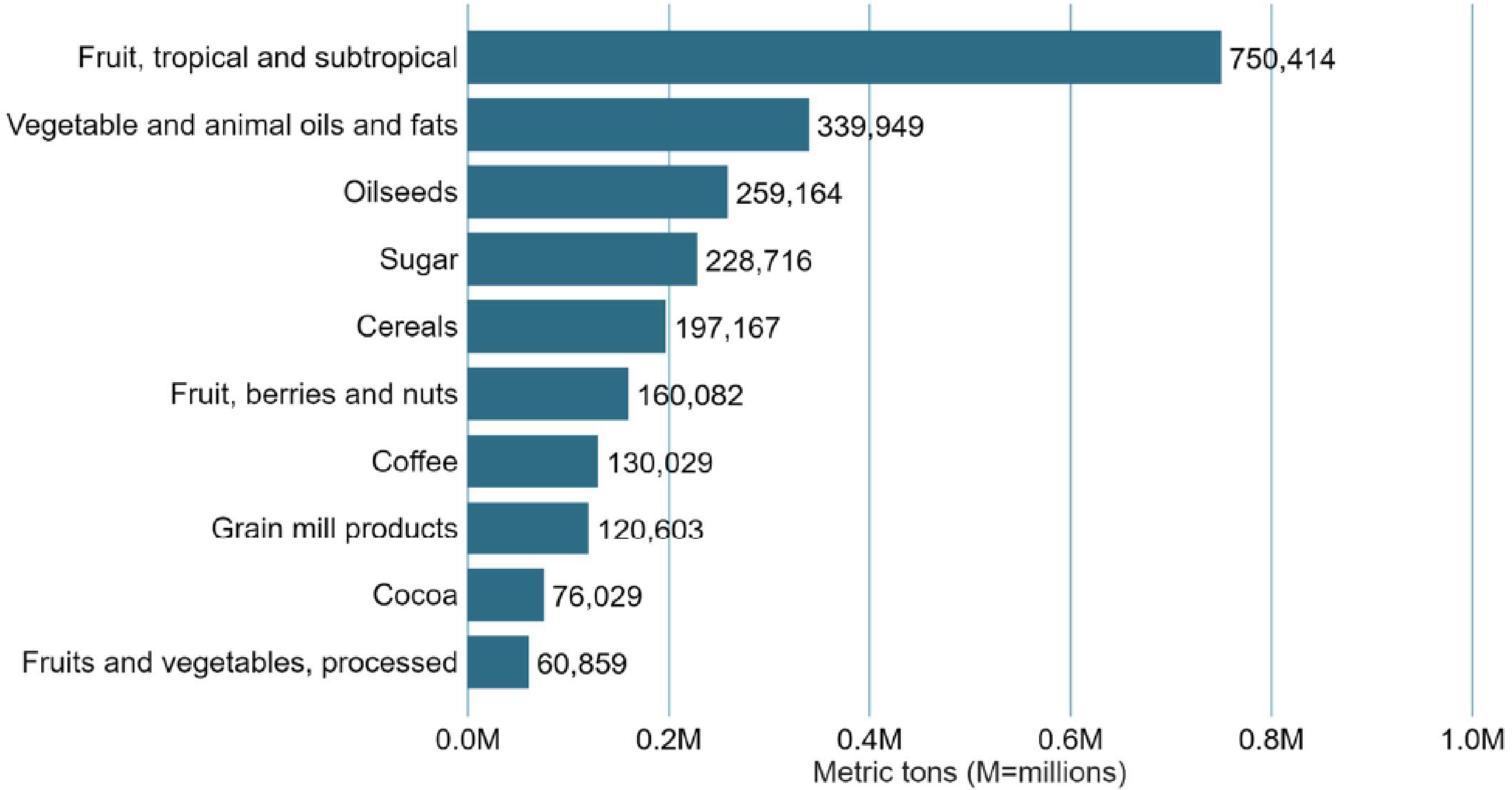
European Union: Organic agri-food imports development 2018 - 2020

Source: Traces/European Commission



European Union: Main product categories of EU organic agri-food imports 2020

Source: Traces/European Commission 2021



Acknowledgements

The Swiss State Secretariat of Economic Affairs (SECO)

Coop Sustainability Fund

NürnbergMesse, the organizers of BIOFACH

IFOAM – Organics International

More than 200 experts from all parts of the world contributed to the FiBL survey 2022.

Price Premium Dynamics: Eggs (PL)

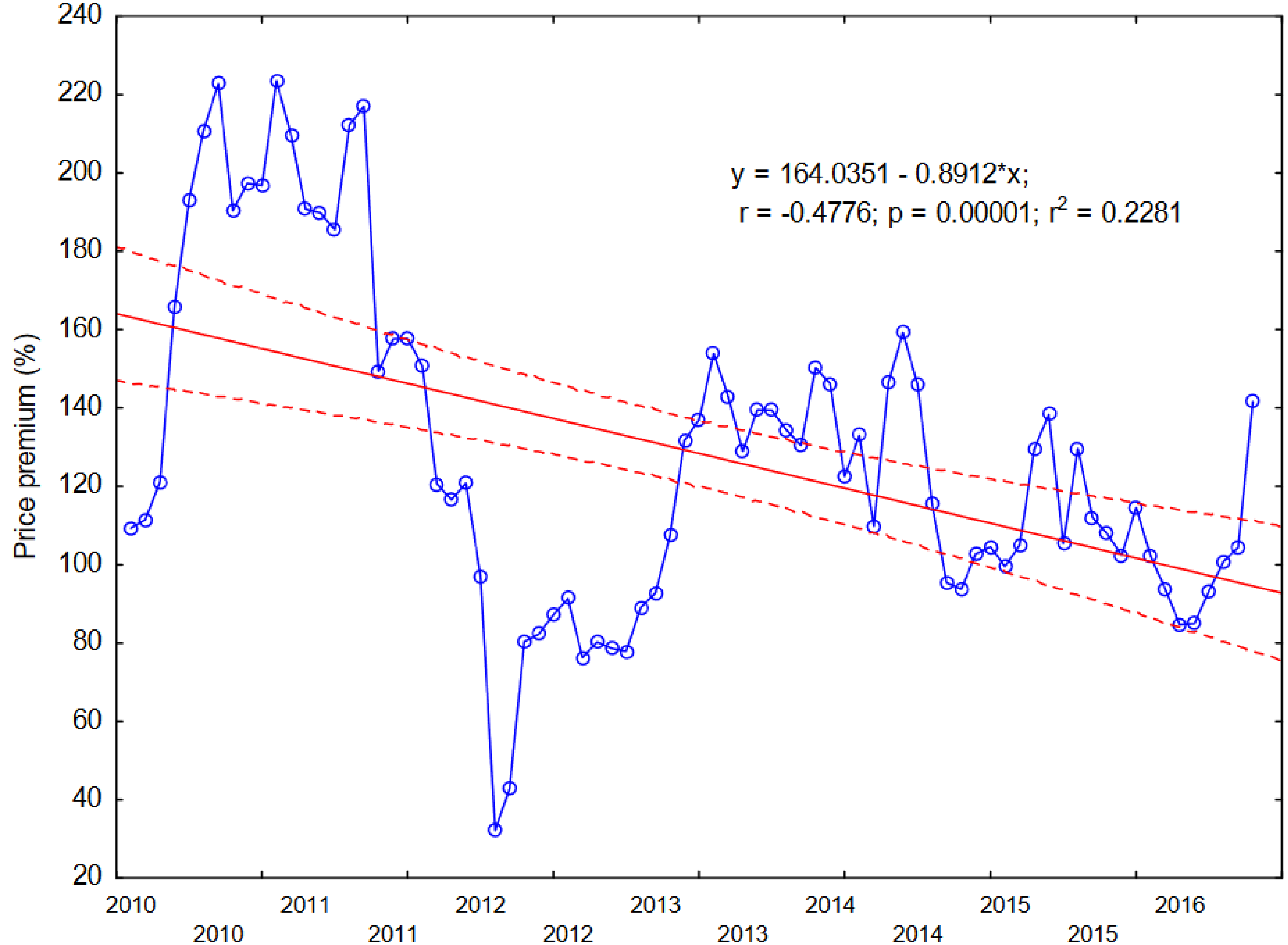
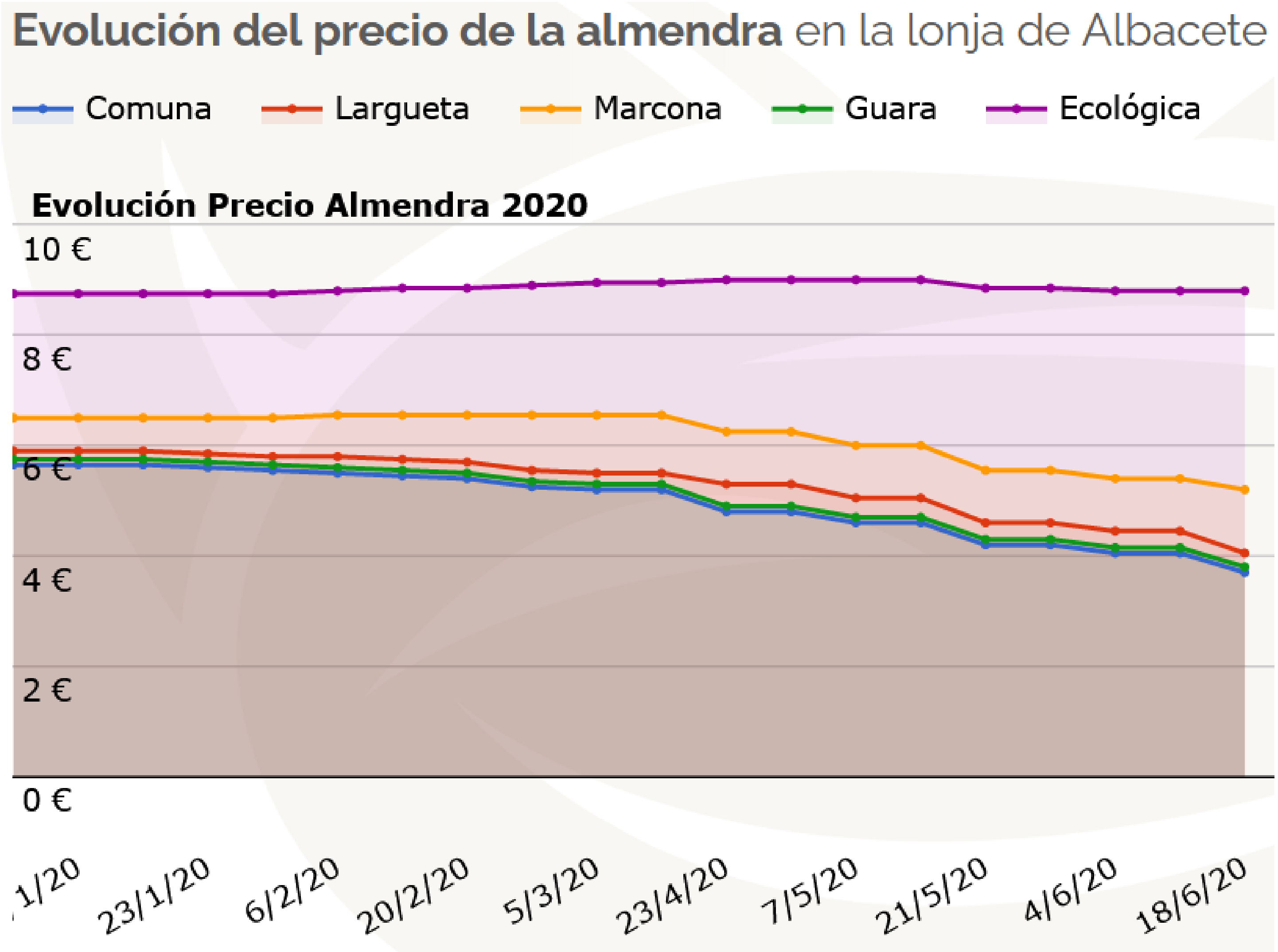


Figure 7. Price premiums for organic eggs on the Polish market in the analyzed period.

Source: Pawlewic, 2020

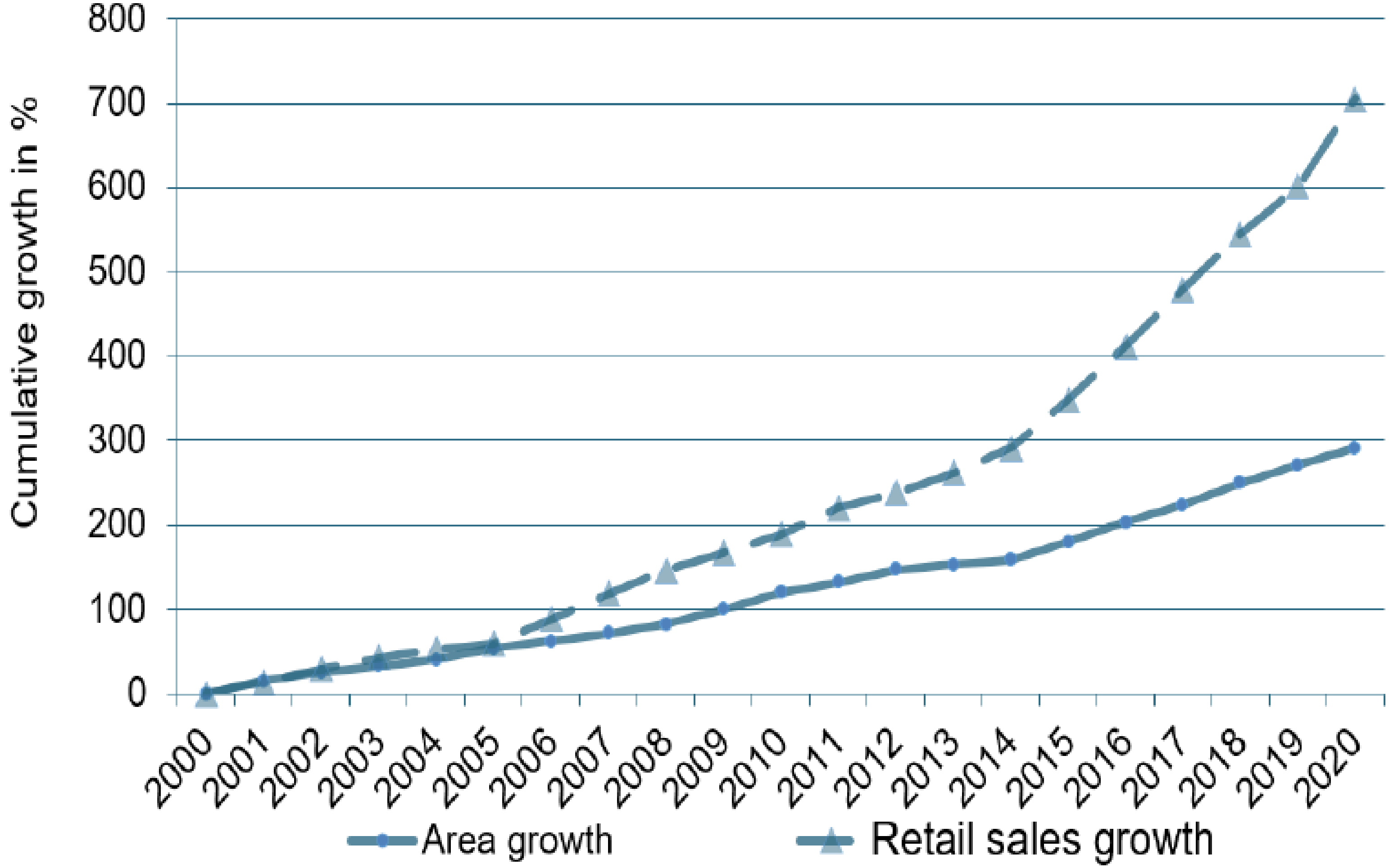
Price Premium Dynamics : Almonds (ES)



Source: Lonja de Albacete, 2022

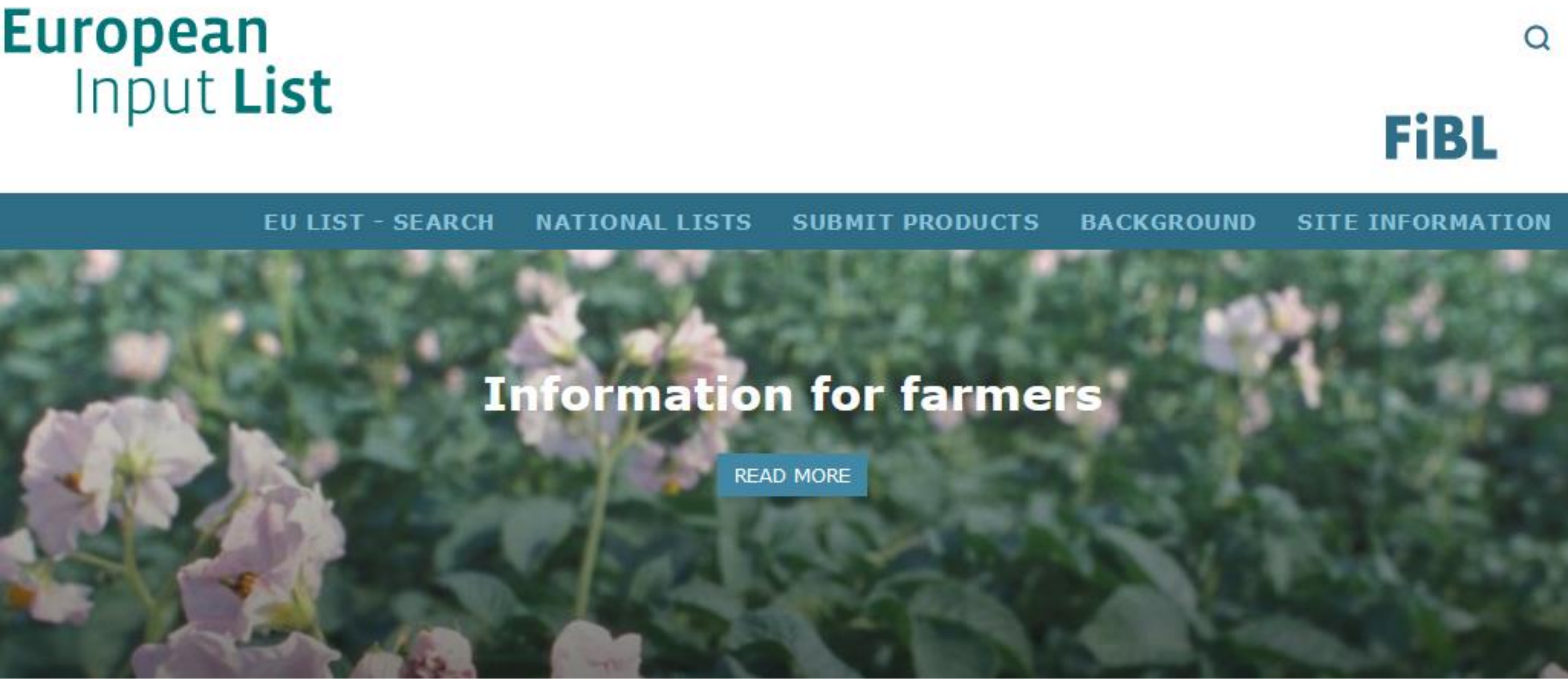
European Union: Growth of organic area and retail sales 2000-2020 compared

Source: FiBL-AMI surveys 2006-2022



Challenges and Opportunities: Organic Inputs in the EU

European Input List



https://www.inputs.eu/

European Input List

Private label requirements

Private label A

Private label B

Private label C

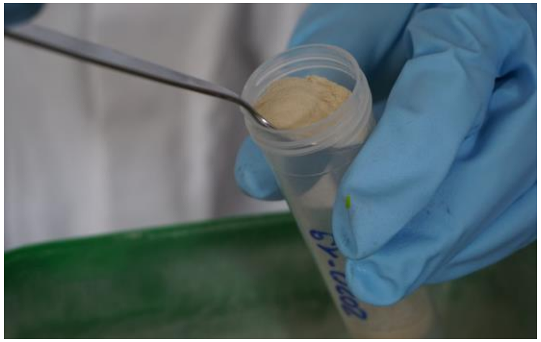
National requirements

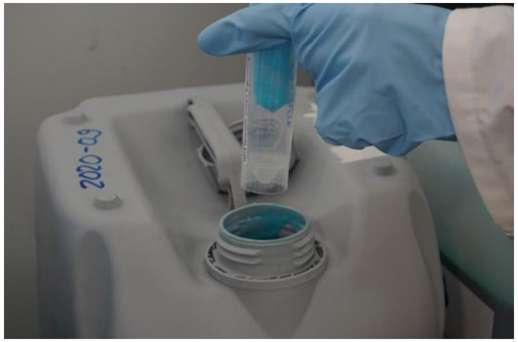
National laws

Basic requirements

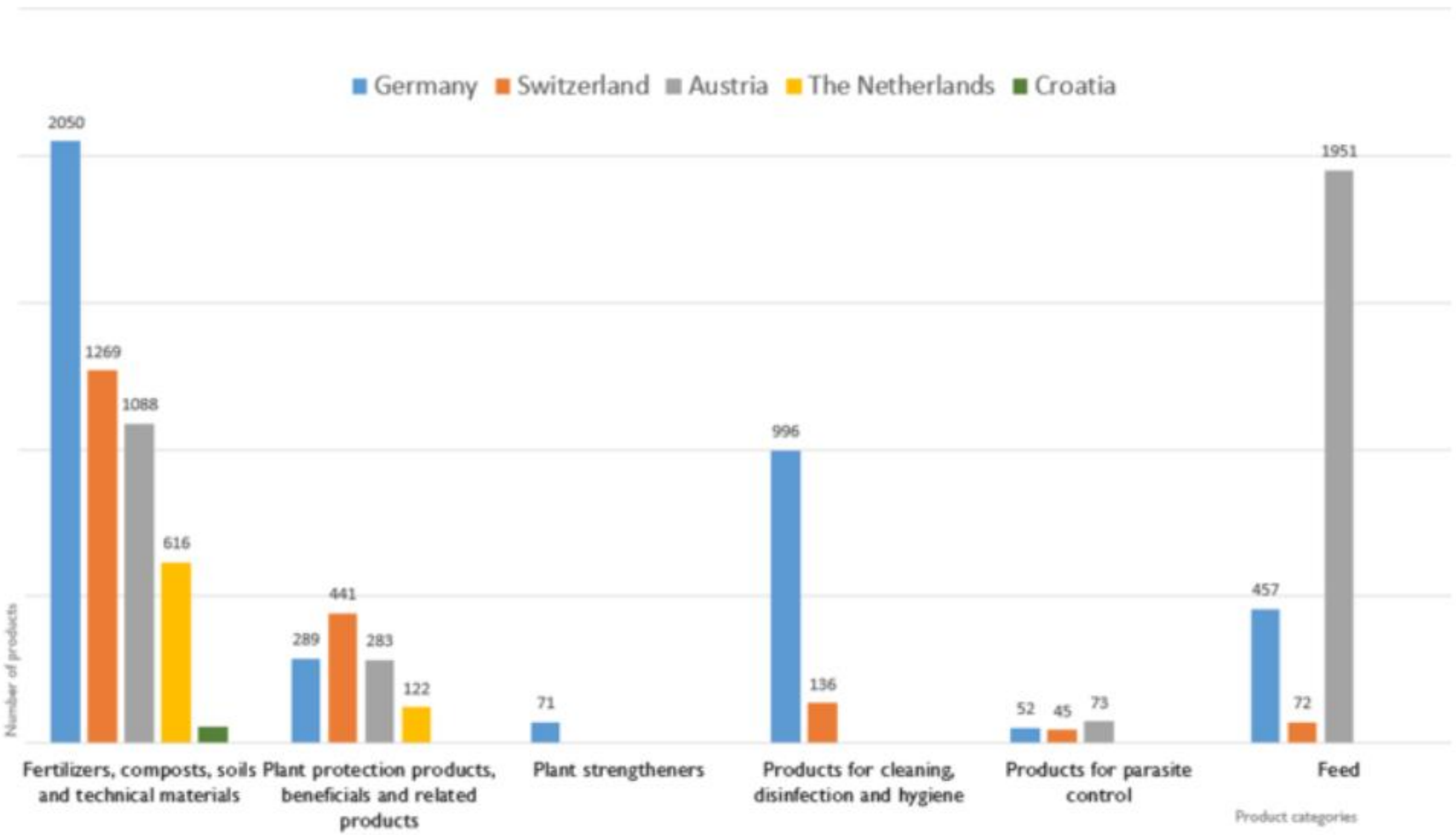
European Input List criteria

EU-legislation

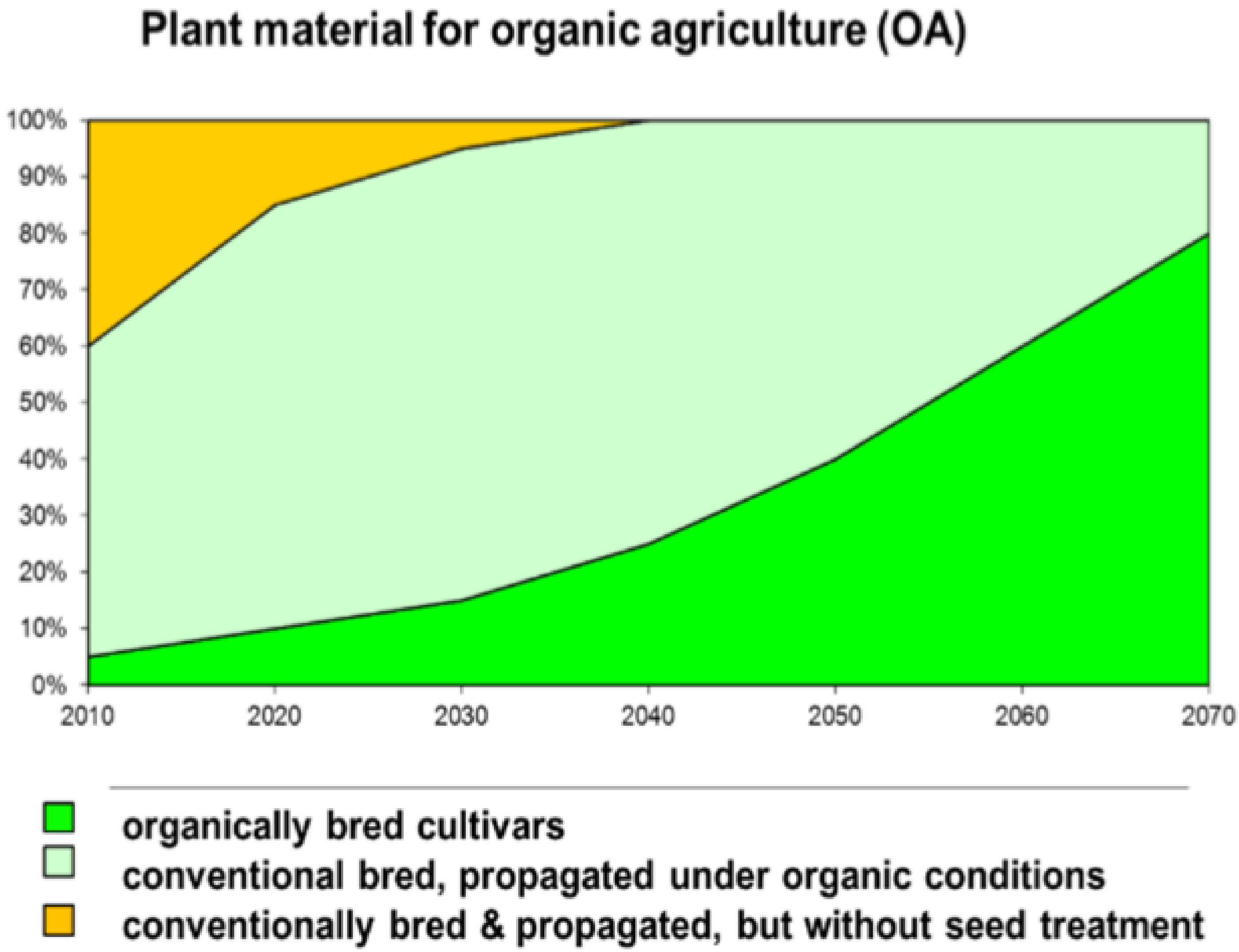




European Input List



Challenges and Opportunities: Organic Breeding in the EU



https://www.liveseed.eu/

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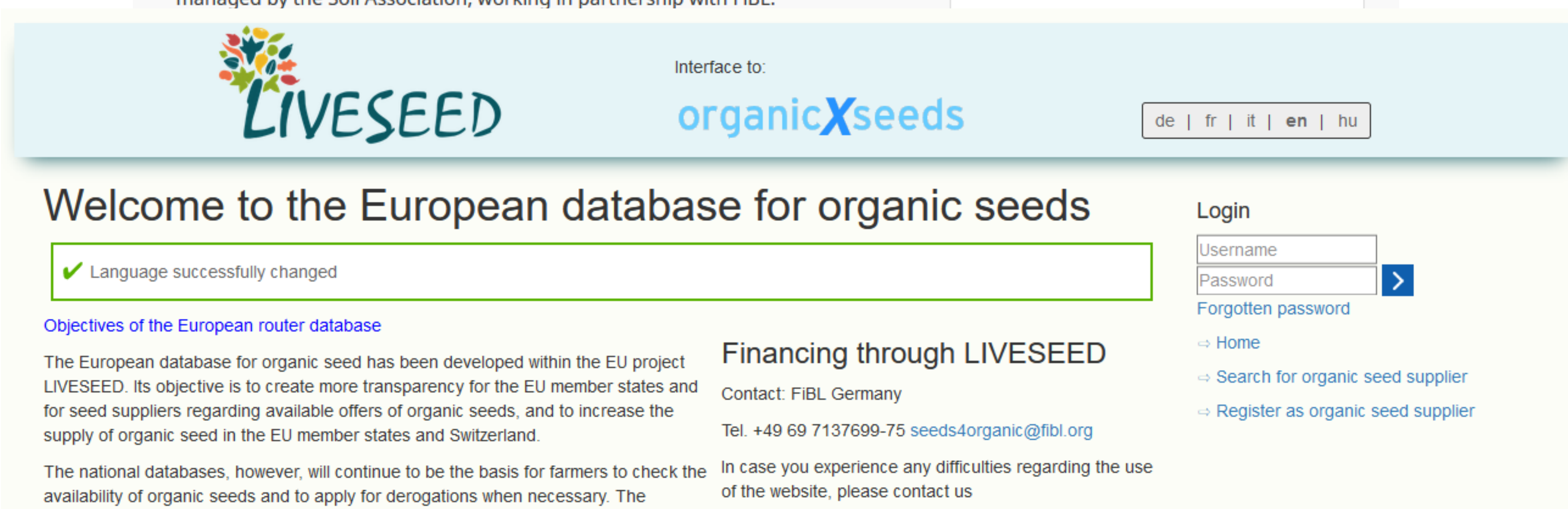
Organic Breeding – Organic Seeds databases



https://www.organicxseeds.com/international/countryselect

Organic Breeding – ECO-PB

ECO·PB

ABOUT ECO-PB MEMBERS RESOURCES C

ECO-PB >> About ECO-PB

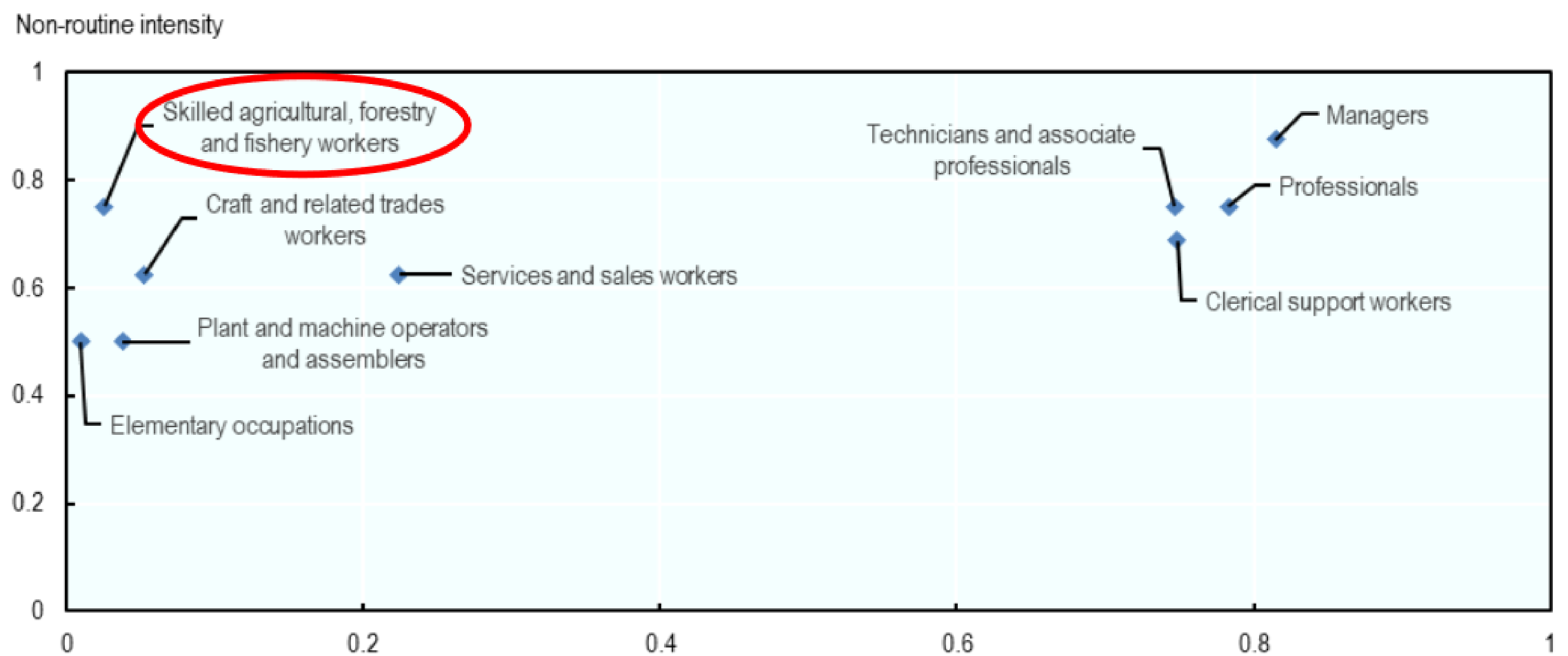
About ECO-PB

OBJECTIVES

The European Consortium for Organic Plant Breeding (ECO-PB) was founded in 2001 with the aim of promoting organic plant breeding and building up an independent expertise. As a non-profit

Challenges and Opportunities: The Digitalization of Organic farming

Digital skills for farmers



OECD (2019), *OECD Skills Outlook 2019: Thriving in a Digital World*, https://doi.org/10.1787/df80bc12-en.

Digital skills for farmers

Farmers need cross-cutting skills to benefit from digital technologies:

- Cognitive and analytical skills
- Basic ICT skills
- Awareness and trust on digital tools for support decision-making
- Navigating internet safely
- Softs skill

Digital opportunities for farmers

Digital technologies for Farmers:

- Mobile devices for access to management and advisory services
- Integrated digital farm (e.g. in-field sensors, farm machinery, IoT)
- Access to knowledge sharing platforms, including vocational training

Interaction with governments and businesses in value chains:

- Digital services (e.g. payment services)
- Access to information (e.g. product prices and standards)

EU Agricultural Digitalization Framework

CAP Article 6.1.b) enhance market orientation and increase competitiveness, including greater focus on research, technology and digitalisation;

Thank You

Contact

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