The Organic Market in Europe

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In 2010, the organic market continued to grow in Europe, particularly in Belgium, Austria, Italy, the Netherlands, and Sweden. While some countries were still affected by the financial crisis leading to stagnation or even decline (e.g., Ireland, United Kingdom, and Norway), the organic market grew significantly in many other European countries. First estimates indicate that in 2011, the European markets grew again at a higher rate.

The European Market in 2010

AMI and FiBL estimate that the total value of the European organic market in 2010 was approximately 19.6 billion euros.

The largest markets were Germany, France, the UK, and Italy. As in previous years, Denmark, Austria, and Switzerland had the highest market shares (as a percentage of total retail sales, and the countries with the highest per capita spending were Switzerland, Denmark, and Luxembourg (see Table 58; Figure 60 and Figure 62). In all surveyed countries (32 in total), the per-capita consumption for organic products was 28 euros.

It remains difficult to compare the European estimate with the published data for the previous year, as individual countries may revise their estimates after publication date. Again, Italian data had to be revised also for historical figures. Based on a comparison of 2010 data with records for 2009, it is estimated that the European market grew by approximately eight percent between 2009 and 2010, indicating that some confidence has returned (Figure 63). It is expected that a new project on Organic Market Data starting in February 2011 funded by the European Commission will help improve data availability and quality in the future.[5]

In 2010, sales grew faster in many countries than in the previous year. In several countries including Austria, Belgium, France, Italy, and the Netherlands, the market grew by more than ten percent. In these countries, consumers turned their awareness towards nutrition and the origin of their food. Sales also increased in Denmark and in Germany, albeit at a much lower rate. The largest European market, Germany, grew by four percent. Growth was due to successful marketing strategies in natural food stores, while demand in the supermarkets stagnated. The Danish market noted a growth of nearly four percent. However, some countries were still affected by the financial crisis, with the market declining further in 2010. In Ireland, the United Kingdom, and Norway, the markets decreased in value between nine and three percent. Market values were not only affected by

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[5] Information on this project is available at the website of the European Commission: http://ec.europa.eu/research/bioeconomy/agriculture/projects/organicdatanetwork_en.htm

sales volumes, but also by rising prices, especially in the second half of the year. Small harvests for many plant products may potentially have hampered growth. For animal products, demand grew faster than supply in many countries, and thus producer and consumer prices started to rise again.

Trends 2011

With the improvement of the general economic conditions and increasing consumer awareness of their food, the growth that started already in the second half of 2010, continued considerably in 2011 and organic products were again experiencing notable sales increases. In 2011, prices rose considerably after two low harvests for many crops, so it is likely that the limiting factor for market growth could again be supply. In some countries, a shortage of supply for cereals and some vegetables is expected for the first half of 2012. Overall, it is estimated that market development in 2011 across Europe resulted in single digit growth rates for sales volumes and a bigger growth rate for the market sales values.[1]

For 2011, market actors expect an on-going growth of the organic market in many countries. In Germany, growth rates are estimated at slightly under ten percent for 2011. The Dutch announced a market growth of 27 percent in the first three quarters of 2011. For the first half of 2011, Italy and France published growth rates of 11 and 10 percent. In Denmark and Finland, double-digit growth rates are again expected. Also, in the United Kingdom a smaller decrease than in previous years is expected.

References

FiBL, AMI, ORC (2011): The European Market for Organic Food 2010. Table. In: Willer/Kilcher (eds.) (2011): The World of Organic Agriculture. Statistics and Emerging Trends 2011. IFOAM, Bonn, and FiBL, Frick

[1] Figures for 2012 will be available in the first half of 2011. They will be reported at www.organic-world.net.

Graphs

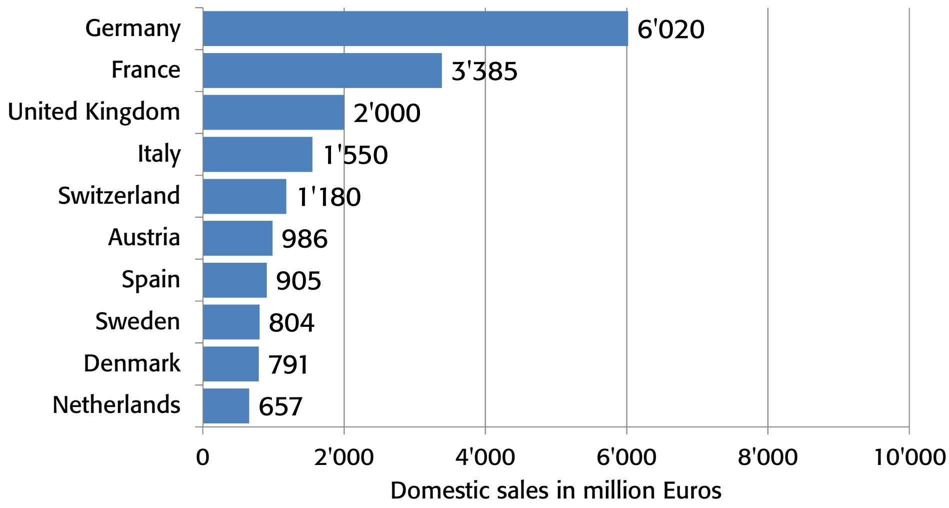

Figure 60: Europe: The ten countries with the largest markets for organic food and beverages 2010

Source: FiBL-AMI Survey 2012. For data sources see annex.

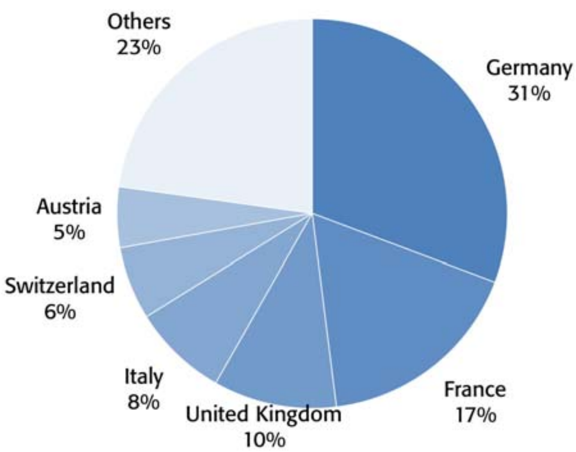

Figure 61: Europe: Distribution of organic food sales 2010

Source: FiBL-AMI Survey 2012. For data sources see annex.

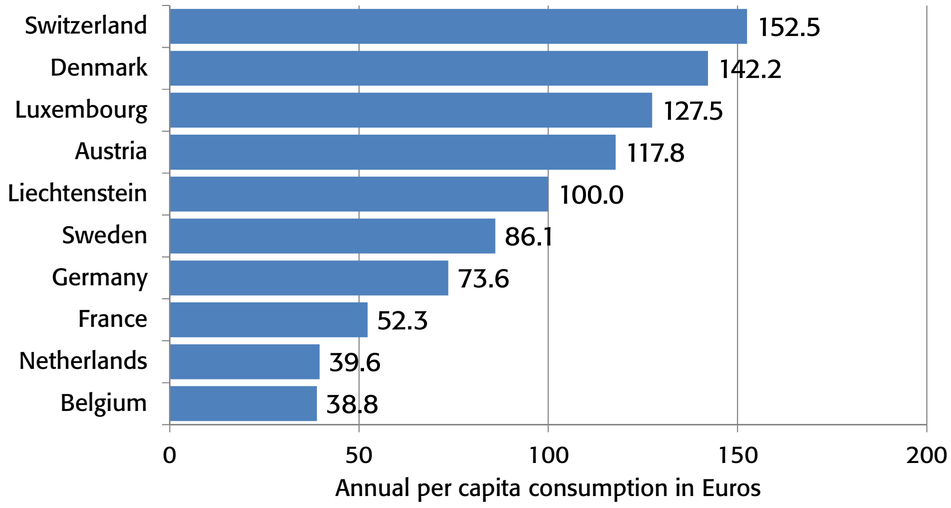

Figure 62: Europe: The ten countries with the highest per-capita consumption 2010

Source: FiBL-AMI-Survey 2012. For data sources see annex.

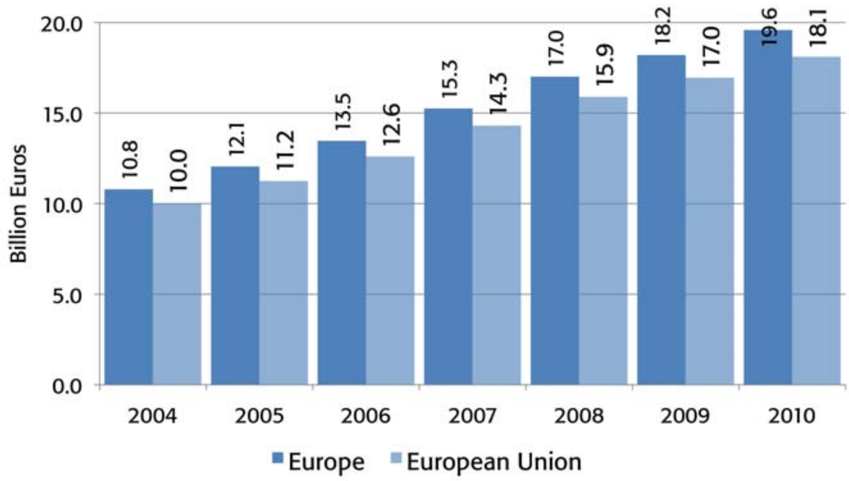

Figure 63: Europe and European Union: Market development 2004-2010

Source: FiBL-AMI Survey 2012. For data sources see annex.

Table: The European market for organic food

Table 58: Europe: The market for organic food 2010

Country	Data year	Sales [Mio €]	€/ person	Growth 1 year [%]	Share [%]	Catering [Mio €]	Export [Mio €]	Import [Mio €]
Austria	2010	986.0	117.8	13.6		59.7	75.9	
Belgium	2010	421.0	38.8	20.3	1.8			
Bosnia and Herzegovina	2008						1.3	
	2010	1.0	0.1					
Bulgaria	2010	7.0	0.9					
Croatia	2010	69.2	15.6	87.0	1.0		4.4	37.8
Cyprus	2006	1.5	1.9					
Czech Republic	2008						4.0	32.0
	2009	68.3	6.5		0.8			
Denmark	2010	791.0	142.2	3.4	7.2	70.0	115.0	172.9
Estonia	2007							3.5
	2009	11.8	8.8		1.0			
Finland	2009						14.0	19.0
	2010	80.0	14.9	6.7	2.0			
France	2010	3'385.0	52.3	10.8	2.0			1'194.0
Germany	2009					300.0		
	2010	6'020.0	73.1	4.0	3.5			
Greece	2006	58.0	5.2					
Hungary	2009	25.0	2.5		0.3	0.1	20.0	18.0
Ireland	2010	103.2	23.1					
Italy	2010	1'550.0	29.8	14.8		250.0	1'050.0	
Liechtenstein	2009	3.4	100.0					
Luxembourg	2010	65.0	127.5					
Montenegro	2010	0.1	0.2					
Netherlands	2007						525.0	
	2010	656.5	39.6	13.1	2.7	92.6		
Norway	2010	112.9	23.5	-3.1				
Poland	2010	58.9	1.5		0.1			
Portugal	2010	21.0	2.1	0.0				
Romania	2010	45.0	2.1					
Russian Federation	2009	65.0	0.5				4.0	30.0
Serbia	2010	40.0	5.5					
Slovakia	2010	4.0	0.7					
Slovenia	2009				1.0	0.1	0.1	23.0
	2010	38.0	18.6					
Spain	2009	905.0	19.5		1.0		454.0	190.0
Sweden	2010	803.8	86.1	6[1]	4.1			
Switzerland	2010	1'180.1	152.5	6.1	5.7			
Turkey	2009	3.6	0.1				19.8	
Ukraine	2010	2.4	0.1					
United Kingdom	2010	2'000.0	32.2	-5.9		17.9		

Source: FiBL-AMI Survey among a number of data sources; for sources see next page and annex.

[1] If catering is included growth was 11 percent.

Note on table

- Blank cells: no information available
- Where no published data exists, best estimates from a range of experts have been used, but these were not available for all cases, so sometimes earlier estimates are shown.
- Values published in national currencies were converted to Euros using the 2010 average exchange rates.
- Please note that due to fluctuating exchange rates it is not possible to make a year-to-year comparison for countries that do not have the Euro as their currency.
- For details on data sources please see annex.
- Corrections, revisions and updates can be sent to helga.willer@fibl.rg
- Corrections and revisions will be posted at www.organic-world.net

Sources

Austria: Bio Austria, Roll-AMA; Belgium: Bioforum; Bosnia and Herzegovina: Ecozept; Bulgaria: Bioselena; Croatia: Darko Znaor; Cyprus: Ecozept; Czech Republic: Ministry of Agriculture and Institute of Agricultural Economics and Information (MZE/ÚZEI; Denmark: Danish Agriculture and Food Council (LF); Estonia: Estonian Organic Farming Foundation EOFF; Finland: Organic Market Info; Organic Food Finland; France: Agence bio; Germany: AMI, the Agrarian Market Information Company; Greece: Ecozept; Hungary: Biokorsar Survey; Ireland: Board Bia; Italy: AssoBio/Pinton Organic Consulting; Liechtenstein: Klaus Büchel Anstalt; Luxembourg: BioLabel; Montenegro: Ecozept; Netherlands: LEI, Bio-Monitor; Norway: SLF; Poland: GTAI; Portugal: INTERBIO; Romania: Business Review; Russian Federation: Eco-Control survey; Serbia: Ecozept; Slovakia: Ecozept; Slovenia: Institute for Sustainable Development (ISD); Spain: Ministry of Agriculture, MARM; Sweden: Statistics Sweden (SCB)/KRAV; Switzerland: Bio Suisse; Turkey: Ministry of Agriculture, estimate; Ukraine: Organic Federation of Ukraine; United Kingdom: Soil Association