The European Market for Organic Food

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Most of the information and statistics presented in this chapter were compiled as part of a survey among national experts of national or international organic markets. Many of these figures are based on estimates, and the methods of data collection vary from country to country as no uniform data collection system for organic market data is yet in place. In addition, national organic sales figures may vary between years depending on the information sources.

Descriptions of market trends in this chapter are the result of market observations by Toralf Richter (Bio Plus AG, Switzerland) and Susanne Padel (University of Wales). The authors would welcome any comments that may help to improve the quality of data and information about the organic market in Europe in future. Some content of this chapter was already published in the Soil Association 'Organic Market Report 2006'[3].

Developments in major organic markets in Europe in 2005 (2)[4]

The published data for individual countries are derived using disparate methods such as consumer panels or expert consultations and are collected with varying amounts of detail. Therefore, the compilation of market data presented in this chapter should be interpreted with care, and should not be used for comparisons between different countries and different years. The data are based on the currently best methods for data collection and compilation in each country, supplemented by estimates of national experts. Where reliable information was available, the trends and developments in the major markets in 2005 are described below, including information on policy, production and retail sectors.

We estimate that in 2005 the European organic market grew by 10 by 15 percent in value and was worth approximately 14.2 billion Euros[5]. However, there are considerable differences in trends between the countries. The highest growth figures can be stated for the Czech Republic (+33 percent), for the UK (+29 percent) and Spain (+20 percent). On the other hand, markets in Finland and Switzerland declined slightly.

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3 The authors acknowledge gratefully the permission of the Soil Association to reproduce the material.
[4] The figures at the end of the subheadlines refer to the references at the end of the text.
[5] Please note that this figure differs from the figure given by Amarjit Sahota in the chapter on the global organic market in this volume. This is due to a difference in methodology. The data presented by Sahota are based on updates of previous data, based on growth rates communicated by retailers, producers, wholesalers, etc. The data presented by Richter/Padel are based on an expert survey but the methodology behind the individual figures may differ (see also explanation in the text).

Germany (3, 4, 5, 6)

Organic sales increased by 11 percent between 2004 and 2005, with an estimated sales value of 3.9 billion Euros. The market share is around three percent, and in Germany 47 Euros are spent per capita expenditures for organic food. Growth for certain mainly fresh food products was above average, such as for milk and dairy products (+33 percent), for vegetables (+21 percent) and for fruits (+42 percent).

41 percent of organic products are sold in traditional multiple retail chains, followed by 31 percent in specialized organic food retailers (organic food shops or health food shops). Growth has been reported across all sectors of the market. For example, the specialized organic food sector reported more than ten percent growth, largely in the area of specialized organic supermarkets.

Sales in the discounters have also grown at an above average rate. In 2005, more than half of all organic carrots were purchased in stores of the discounters (5). Lidl has signed a contract with Arla Foods to supply organic milk to the German market.

Aldi's turnover with organic food increased by 46 percent in 2005, and the remaining discounters report even higher increases of 64 percent. Aldi alone sold 58 percent of all organic carrots, 42 percent of all organic bananas and 29 percent of all organic potatoes.

Growth in Germany is driven by an increasing number of consumers who buy organic food, and the average expenditure for organic food has increased.

- 15 percent of the turnover of the conventional retail chain 'Tegut' was achieved with organic products.
- Growth is expected to have continued in 2006 at a level comparable to 2005. Because the market is growing faster than the supply, shortages in the supply of some raw materials have occurred. In addition, the future development of the national supply is uncertain due to increasing import networks of German processors, wholesalers and retailers.

Italy (2, 8)

Organic sales by value are estimated at 2.4 billion Euros, equivalent to 42 Euros per capita expenditure for organic food.

Approximately 20 million Italians consume organic food, mainly in the urban areas of Northern Italy.

While smaller organic food shops indicate a declining or stable development, bigger organic supermarkets grow.

Organic food in schools is a sector of growing importance, gradually building up over the last five years. In 2004, 920'000 organic meals were provided every day to schools, an increase of 15 percent since 2003. Also, the number of restaurants offering organic products has increased to more than 400.

Great Britain (13, 14)

Organic sales by value were estimated at 2.33 billion Euros (1.6 billion United Kingdom Pounds), equivalent to 39 Euros per capita expenditures for organic food. This represents an increase of approximately 30 percent over the 2004 estimates.

The recent growth has again mainly originated from sales in multiple retailers (31 percent) and in independent retailers (38 percent), but direct sales through producer outlets have increased (11 percent). This contrasts with trends in 2004 where growth had been particularly strong in independent retailers and in direct and alternative supply channels.

Multiple retailers continue to be the most important outlet for organic food (76 percent of all sales), and 16 percent of sales are traded through a variety of other outlets such as independent shops and eight percent are sold through outlets owned by the producers, such as farm shops, producer owned box schemes.

The share of primary produce sourced from the UK has increased in many categories - notably meat, salad crops and vegetables – to 66 percent self-sufficiency in domestic products. However, if demand continues to rise at a similar rate, future domestic supply shortages are likely in some sectors unless more land and livestock is converted. The UK currently experiences shortages in the supply of grains for organic compound feeds.

Approximately 65 percent of households knowingly buy organic food. More people identify themselves as organic consumers, and a wider range of socio-economic groups is making occasional purchases, but the committed shoppers remain important. All shoppers appear interested in the question of where their food comes from and in the story behind it. They state preference for locally grown food, sometimes more important then for organic food.

France (2, 7)

The organic market is estimated to be worth 2.2 billion Euros. This is equivalent to 37 Euros per capita expenditures for organic food

Growth in the market is related to a growing number of consumers purchasing organic food. A study by 'Agence Bio' has shown that organic products are becoming more popular in France; 47 percent of the consumers bought organic produce in 2005, compared to 44 percent in 2004. 73 percent buy organic fruits and vegetables regularly, and 61 percent buy organic eggs. Almost 90 percent of the French population believes that organic farming helps to protect the environment. As in the UK, the supermarkets and hypermarkets are the most important sales channel for organic food in France, followed by weekly markets, specialist shops and direct sales.

Denmark (2, 4, 5)

Organic sales by value were estimated at 307 million Euros in 2005, equivalent to 57 Euros per capita expenditures for organic food.

Estimates suggest that organic turnover increased by ten percent in 2005, suggesting that the period of stagnation the Danish organic market has ended.

Denmark exports ten percent of its organic production and continues to be Europe's biggest supplier of organic milk, closely followed by meat and exports some organic vegetables. However, Denmark also imports a considerable amount of organic products, such as fruit, vegetables, grain as well as tea, coffee and tropical fruit.

Austria (2, 8, 9)

Organic sales by value are estimated at 450 million Euros, equivalent to 56 Euros per capita expenditures for organic food.

Organic sales increased by twelve percent between 2005 and 2004, and they represent a market share of around three percent. Also in 2006, double-digit market growth has most likely been achieved.

64 percent of the organic food sales take place in conventional retail chains, and just 14 percent with specialized organic food retailers (organic food shops or health food shops),

The market growth in Austria is a result of the efforts of all main marketing channels to increase the sales of organic food. If growth continues at similar levels, shortages in supply are expected for several product groups.

The Netherlands (10)

In 2005, sales of organic produce grew by 1.4 percent to 419 million Euros. Retail sales growth mainly occurred in the health food chain (+5 percent) and in catering (+ 22 percent). Due to competition between Dutch retailers, the turnover of organic products in Dutch supermarkets decreased for the first time in ten years (-2.6 percent).

Several organizations have become involved in trying to stimulate consumer demand. Jan Groen, the Director of Green Organics, an international trade organization in organic vegetables, predicts that in the near future there will be a shortage of organic horticultural crops in the Netherlands. To ensure that supply follows demand, he has suggested that conversion subsidies similar to those in Germany and the UK need to be reintroduced. In the Netherlands, farmers currently only receive grants for the maintenance of organic farming and not for the conversion to organic farming.

Belgium (11)

Supermarkets have a 55 percent share of the organic retail market in Belgium. However, weekly markets are becoming more popular and are now worth eight percent of the market, compared to five percent in 2004. According to Jacques Cochez van FV Bio-Boulevard, the cooperative that organizes the organic markets near Antwerp, some markets had to be closed because there are not enough farmers, processors and salespersons. In the first quarter of 2005, the total fresh produce market decreased by 3.3 percent, but consumption of fresh organic products increased by 5.3 percent.

Spain (2, 4)

Organic sales value is estimated at 300 million Euros, equivalent to seven Euros per capita expenditures for organic food.

Organic land area continued to increase between 2004 and 2005 by ten percent to 807'569 hectares, whereas the number of producers decreased. Half of the organic area and about half of the producers are in Andalusia, whereas most processors and importers are based in Catalonia.

Switzerland (2, 9)

In 2005, for the first time in 25 years, the number of organic farms in Switzerland decreased slightly. This is attributed to the structural change in the agricultural industry that also affects the organic sector.

Organic sales decreased slightly by percent between 2004 and 2005, with an estimated sales value of 763 million Euros, representing a market share of around 4.5 percent. Swiss consumers continue to be the biggest spenders in Europe with 103 Euros per head of the population.

75 percent of the organic sales take place via conventional retail chains, and just 15 percent in specialized organic food retailers (organic food shops or health food shops).

The market decline in Switzerland is driven by price reductions in the food sector, which occurred in Switzerland as a response to the market entrance of the Aldi chain.

Sales of organic fruit, vegetables and eggs increased, but sales of organic meat and milk fell slightly.

Small growth has returned in 2006 at a level of approximately two to three percent (estimated at two percent in the conventional retail sector and six percent in the specialized organic food shop sector). Since 2006, Aldi and Mueller are new players that sell organic lines on the Swiss market.

Norway (2, 8)

Organic sales by value are estimated at 41 million Euros, equivalent to nine million Euros per capita expenditures for organic food.

The Norwegian government has set a target for 15 percent of Norwegian food production and consumption to be organic by 2015.

Turkey (4)

In 2005, there were almost 100'000 hectares of organically managed land in Turkey with on approximately 14'400 holdings. Turkish organic products are exported to more than 30 countries, but the majority of exports go to Germany, the Netherlands, the UK, Italy and France.

Central and Eastern Europe (CEE) (2, 8, 12)

In most Central and Eastern European countries (except Czech Republic), the organic sector remains focused on exports. The development of the domestic markets is difficult because of a lack of organic processors and wholesalers and, in some countries, the slow conversion rate of farms. Where markets develop, they are partly supplied by international retail chains using imported product.

In 2005, sales of organic products in the Czech Republic increased by 30 percent to approximately 12 million Euros. Despite of the growing number of organic farms, the retailers' demand for organic food cannot be fully met with domestic production. However, a substantial proportion of the domestic production is also exported. Presently international conventional retail chains, like Tesco or Billa/Rewe, sell 57 percent of the organic products.

In recent years, organic agriculture in Estonia has developed strongly. In 2005, almost 60'000 hectares on more than 1000 holdings were certified as in conversion or organic.

Organic land area in Poland doubled between 2004 and 2005, reaching nearly 168'700 hectares on 7200 farms, but farm size remains small. The domestic sales are estimated at 30 million Euros in 2005.

In 2005, the organically managed land area in Romania increased by 25 percent to almost 100'000 hectares. With Romania's entry to the EU in 2007, growth is expected to continue. The domestic market is small and large volumes of organic products are destined for export. For example, 95 percent of organic honey production is exported, mainly to Germany, Switzerland, the Netherlands and Italy.

In Croatia, a target has been set to increase the organic land area to 10 percent of the total agricultural area by 2010.

Most organic production of Slovakia is exported to Austria, Hungary and the Czech Republic. There are nearly no domestic processing facilities and there is limited demand for organic food. The share of organic products is estimated at 0.1 percent for the year 2004. Mainly fresh products (dairy products, vegetables and fruits) are lacking in the domestic market. 60 percent of the domestic sales is sold via natural food shops, 30 percent is sold by conventional retailers and 10 percent directly by farmers.

There are about 20 organic food stores in Slovenia today, most of them located in the capital of Ljubljana. Apart from specialist stores, organic products are increasingly also sold in approximately 300 supermarkets. Organic products (from Alnatura in Germany) also are sold via the drugstore chain 'dm'.

In the Ukraine, only cropping farms are completely converted to organic. The first organic farms with livestock animal production are still in conversion. The most important organic products are cereals (soft and durum wheat, barley, maize, oats, buckwheat, millet), oilseeds, essential oils (lavender, rose, rosemary) and pulses (soybeans, peas, lentils, chickpeas). The first Ukrainian companies have begun processing organic raw materials in 2006. There is almost no domestic market for organic products in Ukraine (sales of four million Euros in 2005). Market surveys from 2005 and 2006 show that some consumers would buy organic products.

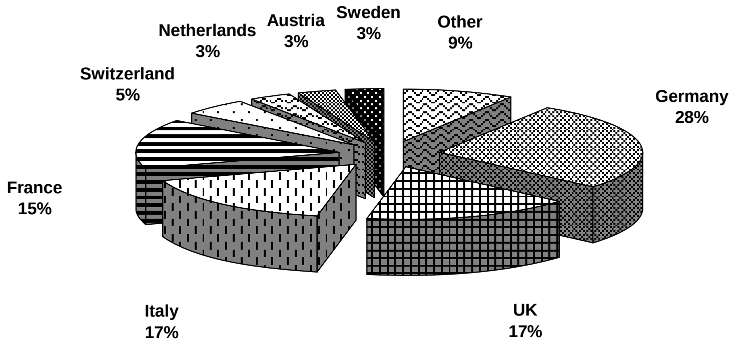

Figure 40: The European market for organic food 2005: Shares of the individual countries of the European organic market

Source: Surveys by Bio Plus AG, Seon, Switzerland, Institute of Rural Sciences, Aberystwyth, UK and Research Institute of Organic Agriculture FiBL, Frick, Switzerland

Table 13: Estimated turnover and per capita consumer expenditures for organic food in selected European countries, 2005

Germany (Source: U. Hamm)	
Turnover domestic organic food market	3'900'000'000
Population (million)	82.5
Per capita consumer expenditure for organic food	47
Italy (Source: R. Pinton)	
Turnover domestic organic food market	2'400'000'000
Population (million)	57.8
Per capita consumer expenditure for organic food	42
UK (Source; Soil Association)	
Turnover domestic organic food market	2'333'000'000
Population (million)	59.5
Per capita consumer expenditure for organic food	39
France (Source: B. Schaer, Ekozept)	
Turnover domestic organic food market	2'200'000'000
Population (million)	59.9
Per capita consumer expenditure for organic food	37
Switzerland (Source: Bio Suisse)	
Turnover domestic organic food market	763'000'000
Population (million)	7.4

Per capita consumer expenditure for organic food	103
Netherlands (Source: EkoMonitor)	
Turnover domestic organic food market	419'000'000
Population (million)	16.2
Per capita consumer expenditure for organic food	29
Austria (Source: Bio Austria)	
Turnover domestic organic food market	450'000'000
Population (million)	8.1
Per capita consumer expenditure for organic food	56
Sweden (Source: www.biomarkt.info)	
Turnover domestic organic food market	433'000'000
Population (million)	9
Per capita consumer expenditure for organic food	48
Denmark (Source: P.H. Larsen)	
Turnover domestic organic food market	306'734'500
Population (million)	5.4
Per capita consumer expenditure for organic food	57
Spain (Source: V. Gonzalvez)	
Turnover domestic organic food market	300'000'000
Population (million)	42.2
Per capita consumer expenditure for organic food	7
Finland (Sources: M. Auersalmi; A. Sahota)	
Turnover domestic organic food market	80'000'000
Population (million)	5.2
Per capita consumer expenditure for organic food	15
Ireland (Sources: E. Mc Auliffe; H. Willer)	
Turnover domestic organic food market	66'000'000
Population (million)	4
Per capita consumer expenditure for organic food	17
Portugal (Source: www.biomarkt.info)	
Turnover domestic organic food market	50'000'000
Population (million)	10.4
Per capita consumer expenditure for organic food	5
Norway (Source: E. Rosn)	
Turnover domestic organic food market	41'000'000
Population (million)	4.6
Per capita consumer expenditure for organic food	9
Poland (Sources: T. Vaclavik; A. Sahota)	
Turnover domestic organic food market	30'000'000
Population (million)	38.2
Per capita consumer expenditure for organic food	0.79
Czech Republic (Source: T. Vaclavik)	
Turnover domestic organic food market	12'000'000
Population (million)	10.2
Per capita consumer expenditure for organic food	1.2
Hungary (Sources: F. Fruehwald; T. Vaclavik)	
Turnover domestic organic food market	5'635'000

Population (million)	10.1
Per capita consumer expenditure for organic food	0.6
Ukraine (Sources: E. Milovanov; H. Willer)	
Turnover domestic organic food market	4'000'000
Population (million)	48.3
Per capita consumer expenditure for organic food	0.08
Liechtenstein (Source: E. Hug)	
Turnover domestic organic food market	2'500'000
Population (million)	0.33
Per capita consumer expenditure for organic food	8

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Europe: Organic farming statistics

Table 14: Organic land and farms in Europe

Country	Year	Organic land area	Share of agricultural land	Organic farms
Albania	2006	1'170	0.10%	93
Austria	2005	360'972	14.16%	20'310
Belgium	2005	22'996	1.65%	693
Bosnia Herzegovina	2006	416	0.02%	26
Bulgaria	2005	14'320	0.27%	351
Croatia	2005	3'184	0.10%	269
Cyprus	2005	1'698	1.12%	305
Czech Rep.	2005	254'982	5.97%	829
Denmark	2005	145'636	5.62%	2'892
Estonia	2005	59'862	7.22%	1'013
Finland	2005	147'587	6.52%	4'296
France	2005	560'838	2.03%	11'402
Germany	2005	807'406	4.74%	17'020

Country	Year	Organic land area	Share of agricultural land	Organic farms
Greece	2005	288'255	3.15%	14'614
Hungary	2005	123'569	2.90%	1'553
Iceland	2005	4'684	0.21%	23
Ireland	2005	35'266	0.84%	978
Italy	2005	1'067'102	8.40%	44'733
Latvia	2005	118'612	4.78%	2'873
Liechtenstein	2005	1'040	27.90%	35
Lithuania	2005	69'430	2.49%	1'811
Luxemburg	2005	3'243	2.51%	72
Macedonia	2004		.	50
	2005	249	0.02%	
Malta	2005	14	0.13%	6
Moldova	2005	11'075	0.44%	121
Netherlands	2005	48'765	2.49%	1'377
Norway	2005	43'033	4.14%	2'496
Poland	2005	167'740	1.03%	7'183
Portugal	2005	233'458	6.34%	1'577
Romania	2005	87'916	0.60%	2'920
Russian Federation	2005	40'000	0.02%	40
Serbia/Montenegro	2005	591	0.01%	
Slovak Republic	2005	92'191	4.91%	196
Slovenia	2005	23'499	4.84%	1'718
Spain	2005	807'569	3.20%	15'693
Sweden	2005	200'010	6.27%	2'951
Switzerland	2005	117'117	10.94%	6'420
Turkey	2005	93'133	0.24%	14'401
UK	2005	619'852	3.90%	4'285
Ukraine	2005	241'980	0.59%	72
Total Europe		6'920'462	1.38%	187'697
Total European Union		6'260'553	3.84%	160'380

Source: FiBL-SOEL-Survey 2007

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