

**Research Institute of Organic Agriculture FiBL**

**IFOAM – Organics International**

# **The World of Organic Agriculture Statistics and Emerging Trends 2019**

**Edited by Helga Willer and Julia Lernoud**

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<http://www.organic-world.net/yearbook/yearbook-2019.html>**

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This document has been produced with the support of the Swiss State Secretariat for Economic Affairs (SECO), the International Trade Centre (ITC), the Sustainability Fund of Coop Switzerland (Coop Fonds für Nachhaltigkeit), and NürnbergMesse. The views expressed herein can in no way be taken to reflect the official opinions of SECO, ITC, Coop Switzerland, or NürnbergMesse.

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This book is available for download at <http://www.organic-world.net/yearbook/yearbook-2019.html>.

Any inquiries regarding this book and its contents should be sent to Julia Lernoud and Helga Willer, FiBL, Ackerstrasse 113, 5070 Frick, Switzerland, e-mail [julia.lernoud@fibl.org](mailto:julia.lernoud@fibl.org) and [helga.willer@fibl.org](mailto:helga.willer@fibl.org).

Please quote articles from this book individually with name(s) of author(s) and title of article. The same applies to the tables: Please quote source, title of table and then the overall report. The whole report should be cited as: Willer, Helga and Julia Lernoud (Eds.) (2019): The World of Organic Agriculture. Statistics and Emerging Trends 2019. Research Institute of Organic Agriculture (FiBL), Frick, and IFOAM – Organics International, Bonn.

Die Deutsche Bibliothek – CIP Cataloguing-in-Publication-Data

A catalogue record for this publication is available from Die Deutsche Bibliothek

© February 2019. Research Institute of Organic Agriculture (FiBL) and IFOAM – Organics International.

Research Institute of Organic Agriculture (FiBL), Ackerstrasse 113, 5070 Frick, Switzerland,

Tel. +41 62 865 72 72, Fax +41 62 865 72 73, e-mail [info.suisse@fibl.org](mailto:info.suisse@fibl.org), Internet [www.fibl.org](http://www.fibl.org)

IFOAM – Organics International, Charles-de-Gaulle-Str. 5, 53113 Bonn, Germany, Tel. +49 228 926 50-10, Fax +49 228 926 50-99, e-mail [headoffice@ifoam.bio](mailto:headoffice@ifoam.bio), Internet [www.ifoam.bio](http://www.ifoam.bio), Trial Court Bonn, Association Register no. 8726

Language editing: Laura Kemper, FiBL, Frick, Switzerland

Cover: Simone Bissig, FiBL, Frick, Switzerland

Layout: Julia Lernoud and Helga Willer, FiBL, Frick, Switzerland

Maps: Julia Lernoud, FiBL, Frick, Switzerland

Graphs (if not otherwise stated): Julia Lernoud and Helga Willer, FiBL, Frick, Switzerland

Infographics: Kurt Riedi and Julia Lernoud, FiBL, Frick, Switzerland

Cover picture: Vegetable field at the Kiltimäe farm, Estonia. Photo: Elen Peetsmann, Research Centre of Organic Farming, Estonian University of Life Sciences. The picture was originally published in the booklet “Organic Farming in Estonia 2017”, available at <http://www.maheklubi.ee/mison/eestis/>

Printed by Medienhaus Plump, Rolandsecker Weg 33, 53619 Rheinbreitbach, Germany

Price: 30 Euros, IFOAM – Organics International affiliates: 20 Euros

Printed copies of this volume may be ordered directly from IFOAM – Organics International and FiBL (see addresses above) or via the FiBL shop at [shop.fibl.org](http://shop.fibl.org)

ISBN Printed version 978-3-03736-118-4

ISBN PDF version 978-3-03736-119-1

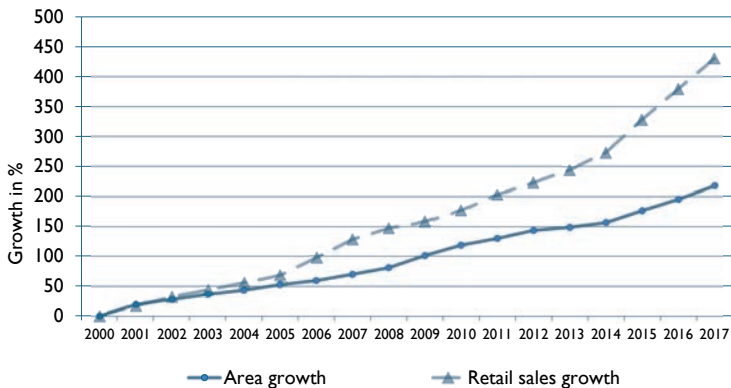
## Organic in Europe: Recent Developments

**HELGA WILLER,<sup>1</sup> BRAM MOESKOPS,<sup>2</sup> EMANUELE BUSACCA,<sup>3</sup>  
NICOLAS DE LA VEGA<sup>4</sup>**

In 2017, the European organic food and farming sector continued to excel both in terms of organic production and market growth. Data for 2017 (for full data see page 216) shows the European organic food market recording significant growth – increasing by more than ten percent to 37.3 billion. At the same time, the organic sector faces a number of challenges, notably that the growth rates in organic area, in spite of recent stronger growth, continues to lag behind the dynamic growth seen within the organic food market (Figure 68). A major milestone in 2018 was the publication of the new European Union rules on organic production and labelling of organic products in May, and in June 2018, the European Commission launched its proposal for the Common Agricultural Policy for the period 2021 to 2027.

### Europe: Growth of organic area and retail sales 2000-2017 compared

Source: FiBL-AMI surveys 2006-2019



**Figure 68: Europe and the European Union: Growth of organic farmland and retail sales compared, 2000-2017**

Source: FiBL-AMI surveys

<sup>1</sup> Dr. Helga Willer, Research Institute of Organic Agriculture (FiBL), Frick, Switzerland, [www.fibl.org](http://www.fibl.org)

<sup>2</sup> Dr. Bram Moeskops, Research and Innovation Manager, International Federation of Organic Agriculture Movements EU (IFOAM EU), Brussels, Belgium, [www.ifoam-eu.org](http://www.ifoam-eu.org)

<sup>3</sup> Emanuele Busacca, IFOAM EU, Brussels, Belgium, [www.ifoam-eu.org](http://www.ifoam-eu.org)

<sup>4</sup> Nicolas de la Vega, IFOAM EU, Brussels, Belgium, [www.ifoam-eu.org](http://www.ifoam-eu.org)

## **New EU organic rules adopted**

On 30 May 2018, the European Parliament and the Council (2018) adopted new European Union (EU) rules on organic production and labelling of organic products. The new EU organic regulation will apply from 01 January 2021. The European organic food and farming movement, represented by IFOAM EU, calls on both the EU institutions and all the stakeholders to work together in the next two years on the development of the secondary legislation (implementing and delegated acts).<sup>1</sup> This should ensure that the regulation will be applicable to the work of all parts in the organic production chain: farmers, producers, traders, and the control system.

As for the new regulation, the categories of products that can be organic certified are live and unprocessed agricultural products (animals, including the ones from aquaculture, plants, algae and seaweed, seed and plant reproductive material, mushrooms), processed food, and feed. The novelty is represented by Annex I of the new regulation, which provides a list of products that are not clearly covered by the mentioned categories but that can still be certified. This list includes specific yeasts, maté, vine leaves, palm hearts, hop shoots, silkworm cocoon, natural gums and resins, essential oils, cork stoppers, raw cotton, raw wool, raw hides, plant-based traditional herbal preparations. It also includes sea salt and other salts for food and feed, even if those are not living organisms. Catering operations, i.e., restaurants and canteens, are outside of the scope of the regulation. However, national or private standards can be applied. For more information about the main changes, see IFOAM EU (2018).

## **Organic regulations for Russia and Ukraine**

Not only did the European Union see relevant regulatory developments in 2018. In June 2018, a new law regulating production, storing and transportation of organic produce in Russia was signed. The new law, previously approved by both chambers of the Russian Parliament, will enter force on January 1, 2020. And on 30 July, the President of Ukraine, signed the Law of Ukraine on the basic principles and requirements for organic production, trade and labelling of organic products, which is harmonized with the European Union organic legislation.

## **Proposal for the Common Agricultural Policy for 2021 to 2027 launched**

In June 2018, the European Commission launched its proposal for the Common Agricultural Policy (CAP) for the period 2021 to 2027. According to IFOAM EU already today organic farming is playing a leading role in making European agriculture more sustainable, the next CAP should reinforce this by better rewarding farmers for the public goods that they provide. With the right incentives and an adequate budget in the next CAP, many more farmers could make an even larger

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<sup>1</sup> The text published in the Official Journal on June 2018 14, represents the “Basic Act.” This means that many details of the text still have to be developed. This will happen in the next two years through other legal acts called “delegated acts” and “implementing acts.” The new EU organic regulation will apply from 2021.

contribution to the environment, climate, and rural communities beyond 2020 (IFOAM EU, 2018).

The organic movement is concerned about the significant cuts foreseen to the second pillar of Rural Development, which so far has been providing crucial support to farmers for the conversion to organic and has helped them with maintenance payments. The second pillar should be strengthened, and more than 30 percent of its budget should be dedicated to the climate and environment CAP objectives (IFOAM EU, 2018).

The newly proposed Eco-schemes offer another opportunity to compensate farmers who want to do more for the climate and the environment, using money from the first pillar that constitutes over three quarters of the total CAP budget. However, essential elements are still missing, including a minimum budget for Eco-schemes and defining the type of agricultural practices and systems that are eligible for support. This will be a key focus of discussion between Council and Parliament (IFOAM EU, 2018).

### Research

Organic farming research is funded under national research programs or national organic action plans as well as through European programmes. Several organic farming research projects have been funded under the EU framework programmes since the mid-1990s. So far, the following projects focussing on organic agriculture have been funded by the current framework programme (Horizon 2020): OK-Net Arable, OK-Net EcoFeed<sup>1</sup> (see more information below), and LIVESEED<sup>2</sup>, ECOBREED<sup>3</sup>, BRESOV<sup>4</sup> (three projects on organic seed and plant breeding). RELACS<sup>5</sup> and Organic-PLUS,<sup>6</sup> which will investigate alternatives for contentious inputs used in organic farming, have started in in spring 2018. A new project addressing animal welfare in organic farming, PPilow, is expected to start in 2019.

Under CORE Organic,<sup>7</sup> a new call for projects was launched in 2016 as a result of which 12 European projects were selected. The projects have started in the course of 2018.<sup>8</sup>

### *Organic Farm Knowledge for farmers and advisers to exchange knowledge*

In December 2018, the Horizon 2020-funded “OK-Net Ecofeed” project launched the extended knowledge platform Organic Farm Knowledge ([www.organic-](http://www.organic-)

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<sup>1</sup> <https://ok-net-ecofeed.eu/>

<sup>2</sup> <https://www.liveseed.eu/>

<sup>3</sup> <http://ecobreed.eu/>

<sup>4</sup> <https://bresov.eu/>

<sup>5</sup> <https://relacs-project.eu/>

<sup>6</sup> <https://organic-plus.net/>

<sup>7</sup> CORE Organic was initiated as a part of the Commission’s ERA-NET Scheme in 2004. It intends to step up cooperation between national research activities and aims to enhance the quality, relevance, and utilisation of European research resources through coordination and collaboration.

<sup>8</sup> <http://projects.au.dk/coreorganicofund>

farmknowledge.eu), which was originally set up in the framework of OK-Net Arable. The platform aims to promote the exchange of information and share practical solutions among farmers across Europe. The platform is available in 12 languages. So far, the platform focuses on solutions for organic arable farming. In 2019, the platform will be expanded to cover tools and solutions related to organic feed for pigs and poultry, as well as seed, breeding, and many other topics. The final goal is for the platform to become the European reference platform for practical information on organic farming.

### *Field days – Exchange meetings of farmers and researchers*

National and international exchange meetings of farmers, researchers, and other actors have been gaining in importance in recent years. The French “Tech and Bio” and the Swiss organic arable day (“Bioackerbautag”) have taken place for several years now. In Germany, in 2019, the second edition of the organic field days (Ökofeldtage) will take place. The first field days in 2017 attracted more than 8'000 visitors. In 2018, the Biofeldtage (organic field days) successfully took place for the first time in Austria.

### *Science Day 2018 at Biofach*

On 16 February, the sixth Science Day took place at BIOFACH. Science Day is a joint event of TP Organics<sup>1</sup>, European Technology Platform for Organic Food and Farming, and TIPI, the Technology Innovation Platform of IFOAM – Organics International. The morning session was dedicated to EU Research and Innovation Policy and was organised in cooperation with ERA-Net CORE Organic. Policy makers from the European Commission, France, and Germany discussed the opportunities of a possible large research mission for the transformation of food and farming systems in Europe to be funded by Horizon Europe, the follow-up framework programme of Horizon 2020. In the afternoon session TIPI elaborated on research gaps in organic food and farming systems in the Global South and its list of 100 questions to be addressed by novel organic food and farming systems. The aim was to inspire the development of strategic regional research agendas.

### *Organic Innovation Days*

The 4<sup>th</sup> edition of the Organic Innovation Days,<sup>2</sup> the annual event of TP Organics, took place in collaboration with the Global Sustainable Technology & Innovation Conference 2018 conference in Brussels in November 2018. The Organic Innovation Days aim to discuss research needs and innovations within and outside the organic sector together with a broad range of stakeholders of the organic sector – from companies and researchers, farmers and farmer organisations to policy makers across Europe. The Organic Innovation Days focused on the EU's next research and innovation framework programme for the period 2021-2027 Horizon Europe and

<sup>1</sup> [www.tporganics.eu](http://www.tporganics.eu)

<sup>2</sup> <http://tporganics.eu/organic-innovation-days/>

opportunities for organic actors. In addition, the winner of the call for organic innovations was presented: the Spanish agro-technological start-up Polyfly that commercializes hoverflies as alternative, effective and natural pollinators.

### *Horizon Europe*

Horizon Europe is the follow-up programme of Horizon 2020. It will run from 2021 until 2027. On 12 December 2018, the plenary of the European Parliament adopted its position on the Regulation and Decision on the Specific Programme of Horizon Europe. According to the position of the European Parliament, Horizon Europe should “accelerate the transition towards sustainable approaches in all forms of agriculture, including conventional and organic agriculture.” The European Parliament has also strengthened commitments on societal engagement, in particular, the inclusion of civil society organisations as well as of European Technology Platforms such as TP Organics in the implementation of Horizon Europe. However, the Parliament failed to support structured engagement with clear targets and indicators to measure progress.

While the European Parliament has recognized the importance of the Sustainable Development Goals (SDGs) and the Paris Agreement, TP Organics remains concerned regarding the public return of Horizon Europe. TP Organics is also concerned about the application of innovation under Horizon Europe as the European Parliament failed to remove the “innovation principle,” a tool to undermine important regulations, in particular the precautionary principle, putting the health and environment of EU citizens at risk. In 2019, the Council will adopt its position on Horizon Europe after which the final version of the legal texts will be negotiated between European Parliament, Council, and European Commission.

### *ICOAS Conference – Scientific exchange with a focus on Central and Eastern Europe*

From November 7-9, 2018, the 6th International Conference on Organic Agriculture Sciences (ICOAS) was held in Austria. High-level international experts met at Esterházy Palace, Eisenstadt, to exchange knowledge and experiences from different areas of organic production. The theme of the conference, organized by the Research Institute of Organic Agriculture FiBL and the Esterhazy Foundation with funding from the Austrian government, was “Dynamic Developments in Organic Research – strengthening Partnerships across Europe and beyond.” ICOAS brought together scientists, advisors, entrepreneurs, policymakers, associations, non-governmental organisations, and other stakeholders to meet and discuss latest research results and developments in organic agriculture in Central and Eastern European countries. Two hundred participants from 30 countries actively discussed the latest developments in the organic sector. More information is available on <http://icoas2018.org/>

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- › [tporganics.eu](http://tporganics.eu): European Technology Platform TP Organics



## Milestones of Organic Agriculture in Europe

Year	Milestones <sup>1</sup>
1920s/1930s	Natural farming evolves in Germany ("Natürlicher Landbau, Landreform") (Vogt 2001).
1924	Rudolf Steiner's Agriculture Course held at Koberwitz (now Kobierzyce, Poland), marking the beginning of biodynamic farming.
1946	Foundation of the Soil Association, UK.
1946	Hans and Maria Müller found the Co-Operative for Cultivation and Utilization ("Anbau- und Verwertungsgenossenschaft Heimat AVG) in Switzerland, marking the beginnings of the organic-biological agriculture (Bio Suisse 2006).
1972	The International Federation of Organic Agriculture Movements IFOAM is founded in Versailles, France.
1973	Research Institute of Organic Agriculture FiBL founded in Switzerland.
1977	1st IFOAM International Scientific Conference "Towards a Sustainable Agriculture" takes place in Sissach, Switzerland.
1980	The first version of the "Recommendations for international standards of biological agriculture" is accepted by the biennial IFOAM General Assembly in Brussels, based on the organic standards developed in Switzerland, France, and the United Kingdom.
1981	Organic farming is mentioned in the Austrian Codex Alimentarius.
1984	Foundation of the first chair for organic agriculture worldwide in Witzenhausen, University of Kassel, Germany.
1985	The French government implements a national voluntary organic standard associated with the AB logo.
1987	Denmark is the first country to implement a regulatory framework for organic farming.
1988	For the first time, area-based support for organic farming granted, within the framework of the EU Extensification Programme (support only in Germany).
1990	The first BioFach, the international trade fair for organic products, takes place in Ludwigshafen am Rhein, Germany.
1991	The first European organic regulation - Council Regulation (EEC) 2092/91 of 24 June 1991 on organic production of agricultural products and indications referring thereto on agricultural products and foodstuffs - is published. It comes into force in 1993. It defines how agricultural products and foods that are designated as organic/ecological/biological products have to be grown and labelled.
	Foundation of the informal IFOAM EU group in Prague.
1992	The European Union's agri-environmental programme is launched (Council Regulation (EEC) No 2078/92).
1999	First publication from Eurostat, the statistical office of the European Union, on organic agriculture in the European Union, with data from 1997.
	Organic conference in Baden near Vienna - 1st step towards the European Action Plan.
	EU Organic Regulation regulates animal husbandry (Regulation (EC) 1804/99).
2000	Publication of the book "The World of Organic Agriculture" for the first time by SÖL and IFOAM; since 2001 in collaboration with the Research Institute of Organic Agriculture.
2001	BSE crisis heralds new phase for organic farming in the European Union.
2001	European Conference "Organic Food and Farming - Towards Partnership and Action in Europe" takes place in Copenhagen, Denmark. The Copenhagen Declaration stipulates an organic action plan for Europe.

<sup>1</sup> For a detailed history of organic agriculture in Europe (and other parts of the world) see book „Organic Farming: An International History“ edited by Willi Lockeretz, published by CABI; Wallingford 2007

Year	Milestones <sup>1</sup>
2002	Launch of the online archive Organic Eprints for research publications on organic agriculture ( <a href="http://www.orgprints.org">www.orgprints.org</a> ).
2004	Adoption of the first European Action Plan for Organic Farming.
2003	Formal foundation of the IFOAM-EU Group.
2004	Launch of QualityLowInputFood (QLIF), the largest EU research project in organic farming to date.
2004	CORE Organic ("Coordination of European Transnational Research in Organic Food and Farming Systems") starts with the aim increase cooperation between national research activities.
2007	TP Organics, the European Technology Platform for Organic Food and Farming Research is set up.  Revised EU organic regulation published (Council Regulation (EC) No 834/2007 of 28 June 2007 on organic production and labelling of organic products).
2014	Publication of the 2nd European Action Plan for Organic Farming.
2015	First edition of Organic Innovation Days is organized by TP Organics.
2018	Revised EU regulation on organic farming published (Regulation (EU) 2018/848 of the European Parliament and of the Council of 30 May 2018 on organic production and labelling of organic products and repealing Council Regulation (EC) No 834/2007). It will enter into force on 1 January 2021.

Compiled by Helga Willer, FiBL, Bram Moeskops, IFOAM EU, and Otto Schmid, FiBL

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## Europe and the European Union: Key indicators 2017

Table 53: Europe and the European Union: Key indicators 2017

Indicator	Europe	European Union	Top 3 countries Europe
<b>Organic farmland in hectares</b>	14.6 million ha	12.8 million ha	Spain (2.1 million ha) Italy (1.9 million ha) France (1.7 million ha)
<b>Organic share of total farmland</b>	2.9 %	7.2 %	Liechtenstein (37.9%) Austria (24.0%) Estonia (20.5%)
<b>Increase in organic farmland 2016-2017 in hectares</b>	1.0 million ha	0.8 million ha	Russia (+341'778 ha) France (+206'373 ha) Germany (+121'837ha)
<b>Relative increase in organic farmland 2016-2017</b>	7.6%	6.4%	Russia (+108 %) Malta (+80%) Bosnia and Herzegovina (+28%)
<b>Land use [in million hectares]</b>	Arable crops: 6.8 Permanent crops: 1.6 Permanent pastures: 5.9	Arable crops: 5.5 Permanent crops 1.4 Permanent pastures: 5.7	
<b>Top arable crop groups</b>	Cereals: 2.5 million ha Green fodder: 2.4 million ha Oilseeds: 0.4 million ha	Green fodder: 2.2 million ha Cereals: 2.0 million ha Dry pules: 0.4 million ha	Largest arable areas: France (0.9 million ha) Italy (0.8 million ha) Russia (0.6 million ha)
<b>Top permanent crop groups</b>	Olives: 0.6 million ha Grapes: 0.3 million ha Nuts: 0.3 million ha	Olives: 0.5 million ha Grapes: 0.3 million ha Nuts: 0.3 million ha	Largest permanent crop areas: Spain (0.5 million ha) Italy (0.5 million ha) Turkey (0.2 million ha)
<b>Wild collection area</b>	18.0 million ha	14.7 million ha	Finland (11.6 million ha) Romania (1.8 million ha; 2014) Macedonia, FYR (1.2 million ha)
<b>Producers [no.]</b>	397'509	305'394	Turkey: (75'067) Italy (66'773) Spain (37'712)
<b>Processors [no.]</b>	71'375	68'164	Italy (18'092) Germany (15'0191) France (14'859)
<b>Importers [no.]</b>	5'314	4'585	Germany (1'692) Switzerland (548) Netherlands (385)
<b>Retail sales</b>	37.3 billion euros	34.3 billion euros	Germany (10'040 million euros) France (7'921 million euros) Italy (3'137 million euros)
<b>Growth of retail sales 2016-2017</b>	10.5%	10.9%	France (18 %) Spain (16 %) Denmark, Liechtenstein (15%)
<b>Organic share of total market</b>	No data	No data	Denmark (13.3 %) Sweden (9.1%) Switzerland (9.0 %)
<b>Per capita consumption [euros]</b>	47 euros	67 euros	Switzerland (288 euros); Denmark (278 euros) Sweden (237 euros)

Source: FiBL-AMI survey 2019.

For detailed data sources see annex.