



# World Market for Organic

Organic Congress – 16<sup>th</sup> November



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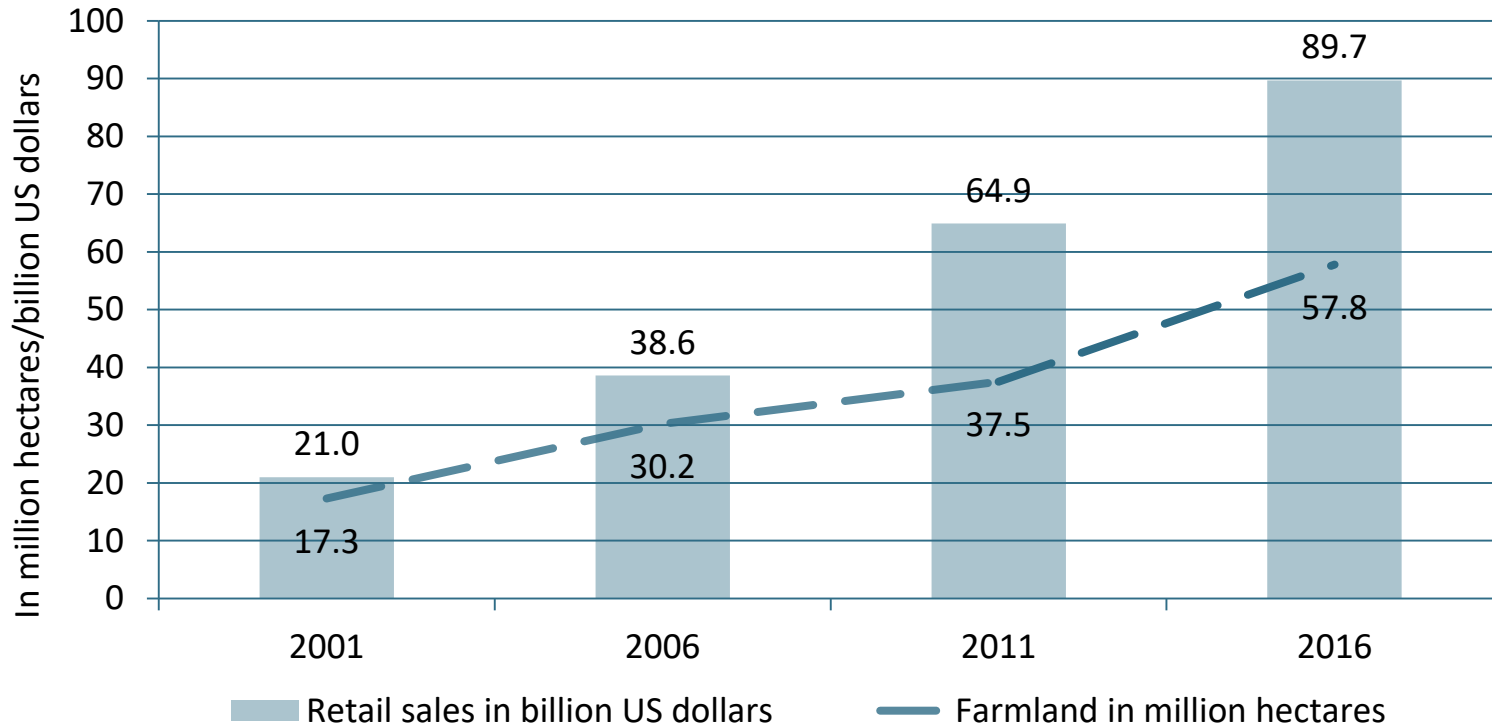
## Another record year – World highlights 2016

- Organic agricultural land reached an all time high with 57.8 million hectares
- Largest area growth so far: 7.5 million hectares more than 2015
- In all continents the organic area increased
- 1.2 percent of the agricultural land is organic
- In 15 countries 10 percent or more of farmland is organic
- 2.7 million producers were reported – another all time high

## World: Market growth versus retail sales growth 2001-2016

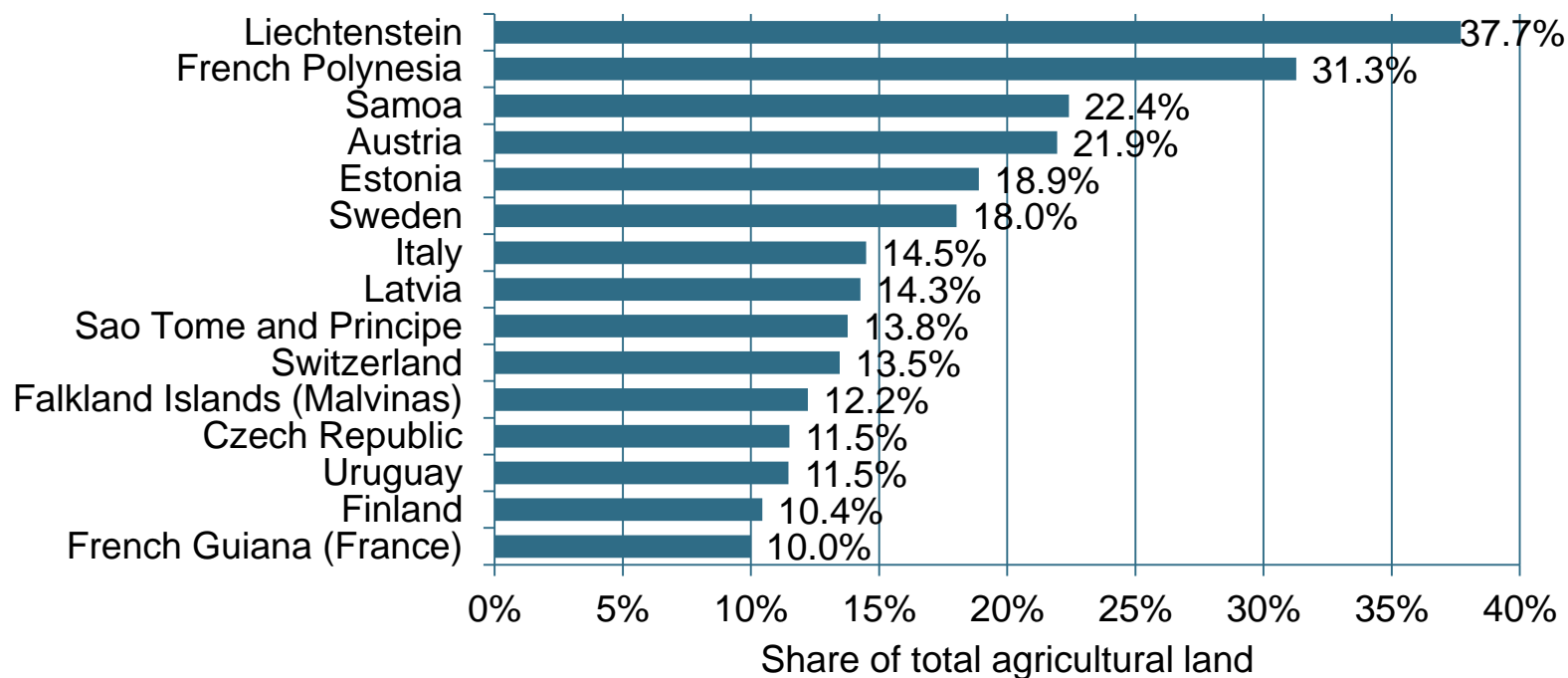
### Growth in organic food & drinks sales and farmland, 2001-2016

Source: Ecovia Intelligence 2018



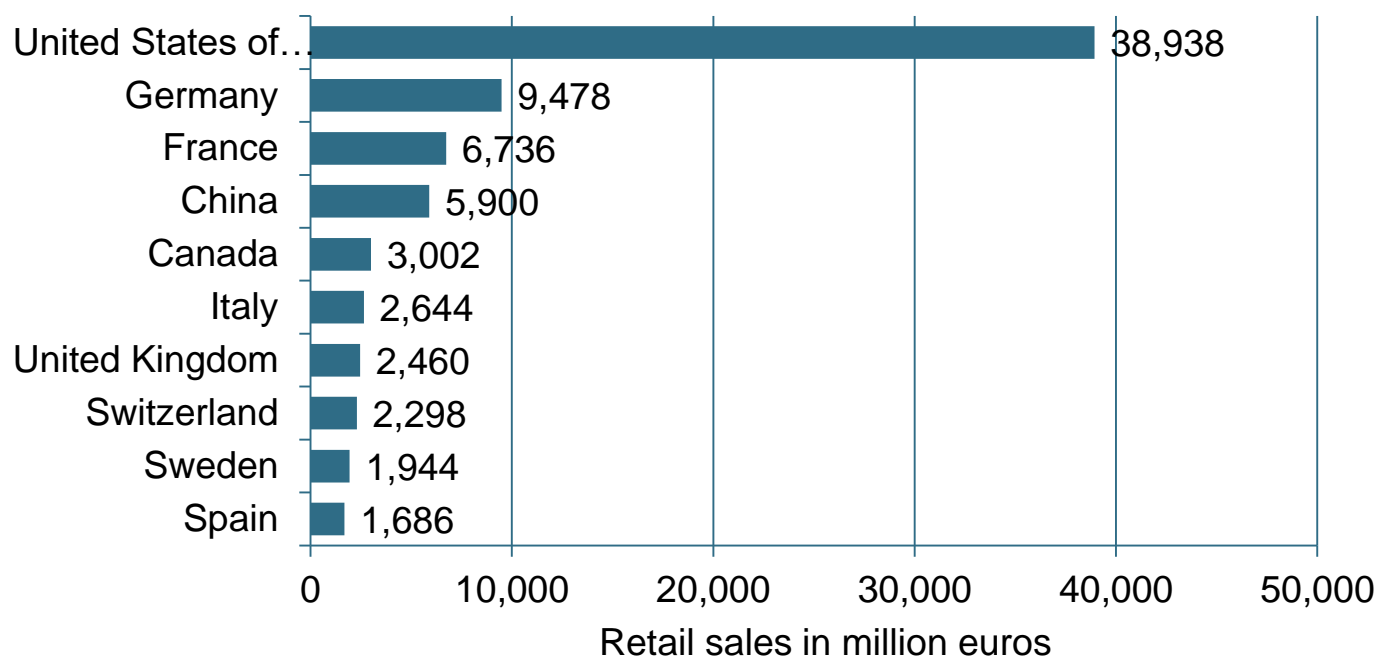
# Countries with an organic share of at least 10% of the agricultural land 2016

Source: FiBL survey 2018



# The ten countries with the largest markets for organic food 2016

Source: FiBL-AMI survey 2018

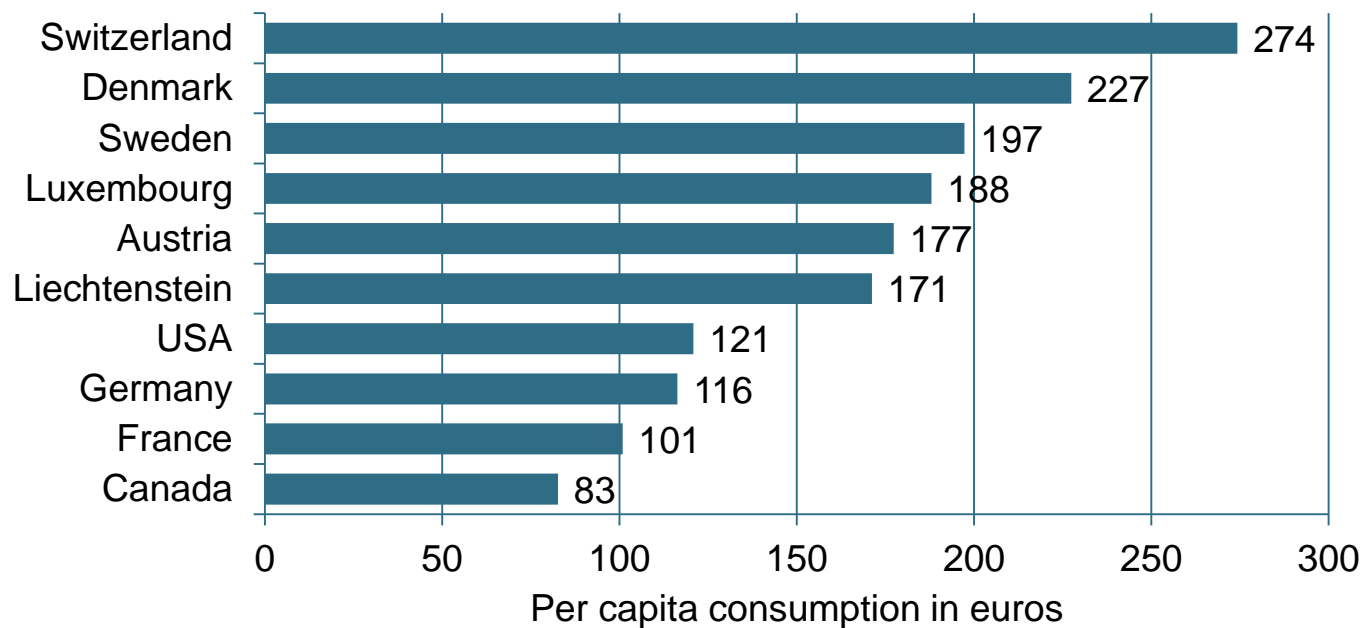


**UK organic market - 1.5% of retail sales**

(IFOAM EU – Organic in Europe)

## The ten countries with the highest per capita consumption 2016

Source: FiBL-AMI survey 2018

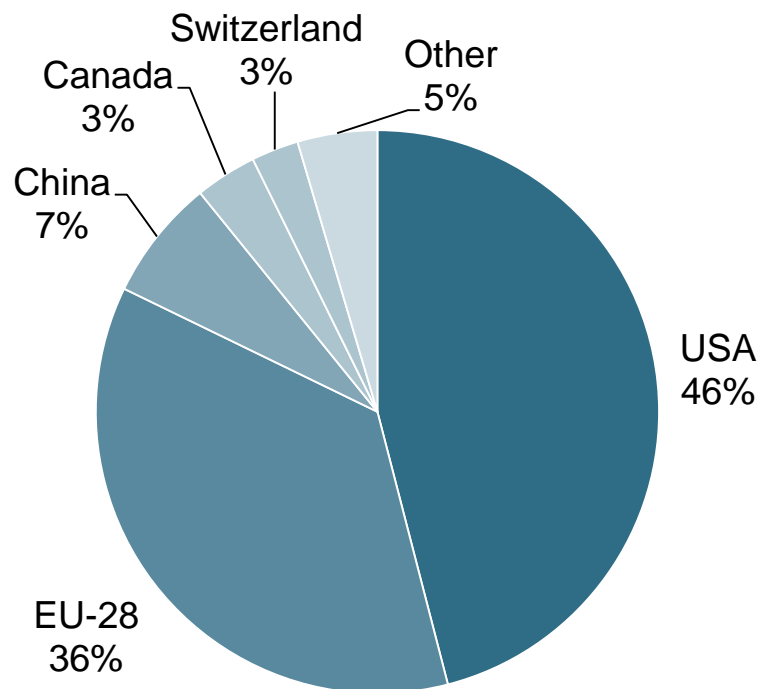


**UK equivalent spend per capita – €38**

(IFOAM EU – Organic in Europe)

## Global market: Distribution of retail sales value by single market 2016

Source: FiBL-AMI survey 2018



# US Market Development

## ORGANIC V. CONVENTIONAL SALES

U.S. Organic Food vs. Total Food Sales, Growth & Penetration, 2007-2016

CATEGORY	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Organic Food	18,188	21,571	22,497	24,123	26,336	29,023	32,335	35,952	39,700	43,094
Growth (%)	16.4%	18.6%	4.3%	7.2%	9.2%	10.2%	11.4%	11.2%	10.6%	8.4%
Total Food	628,219	659,012	669,556	677,354	713,985	740,450	760,486	787,575	807,900	812,907
Growth (%)	5.0%	4.9%	1.6%	1.2%	5.4%	3.7%	2.7%	3.6%	2.6%	0.6%
Organic (as % Total)	2.9%	3.3%	3.4%	3.6%	3.7%	3.9%	4.3%	4.6%	4.9%	5.3%

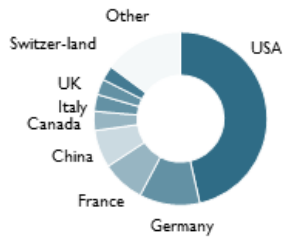
SOURCE: ORGANIC TRADE ASSOCIATION'S 2017 ORGANIC INDUSTRY SURVEY CONDUCTED 2/2/2017-3/31/2017 (CONVENTIONAL SALES)



# Europe: Organic Retail Sales 2016



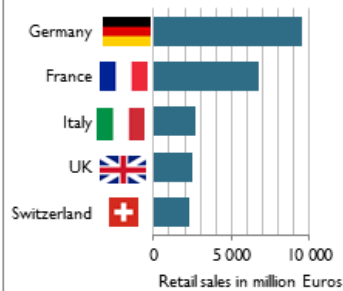
The European Union (30.7 billion €) is the second largest single market after the US (38.9 billion €) and China. By region, North America has the lead (41.9 billion €), followed by Europe (33.5 billion €) and Asia.



Distribution of retail sales value worldwide by country 2016



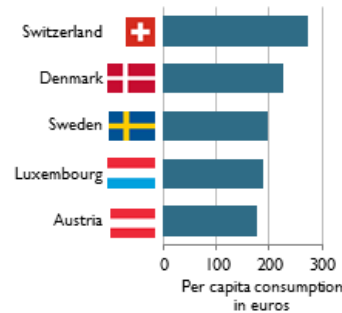
The European countries with the largest markets for organic food are Germany (9.5 billion €), France (6.7 billion €), Italy (2.6 billion €), and the UK (2.5 billion €).



The countries with the largest markets for organic food 2016



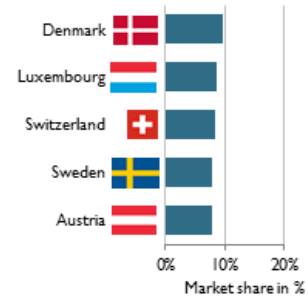
Switzerland has the highest per capita consumption of organic food worldwide, followed by Denmark and Sweden.



The countries with the highest per capita consumption of organic food 2016



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

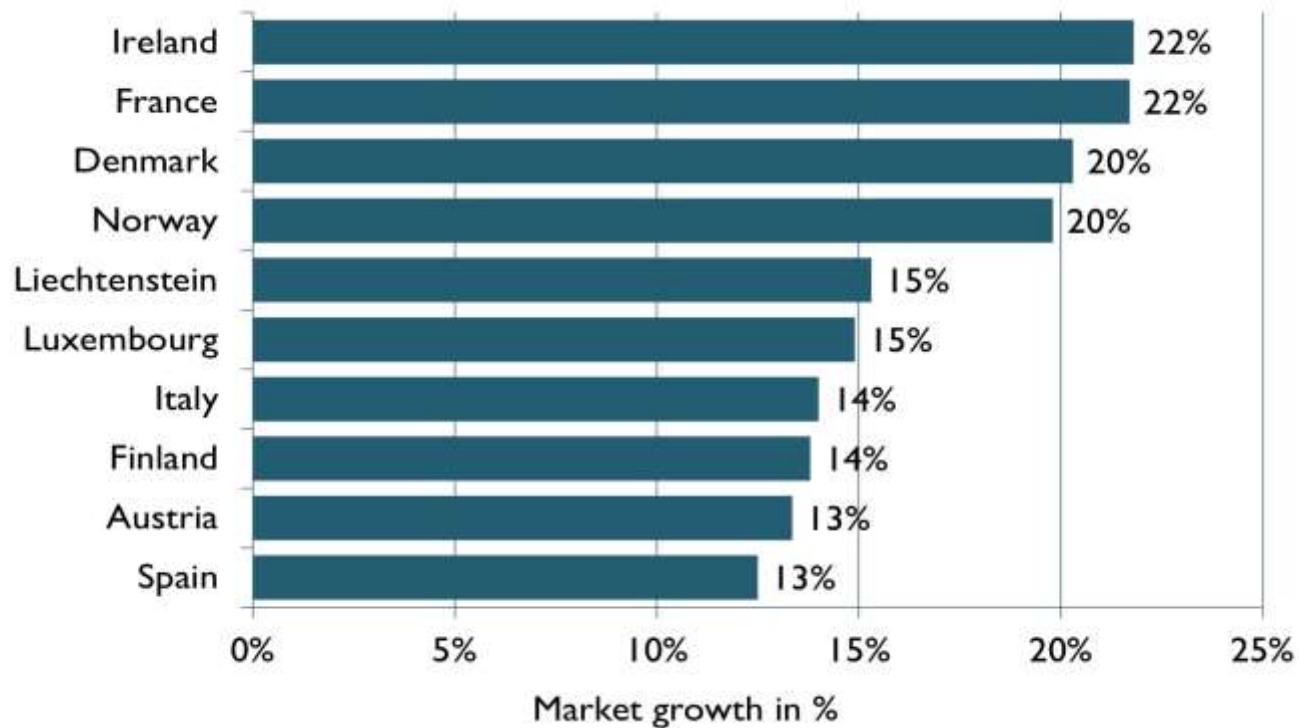


The countries with the highest organic shares of the total market 2016

Source: FiBL survey 2018 [www.organic-world.net](http://www.organic-world.net)

## Europe: the countries with the highest growth of the organic market 2015 - 2016

Source: FiBL-AMI survey 2018



## Summary

- In 2016 worldwide organic food and farming continued to grow to all time highs for farmland, producers and the market
- Area growth is accelerating however particularly in Europe (and the UK) production is still not keeping pace with the market development
- For better monitoring of the development of the sector and to increase transparency, data collection and processing needs to be improved, in particular in market and international trade data