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Edition



ORGANIC SECTOR IN THE EUROPEAN UNION



Agence
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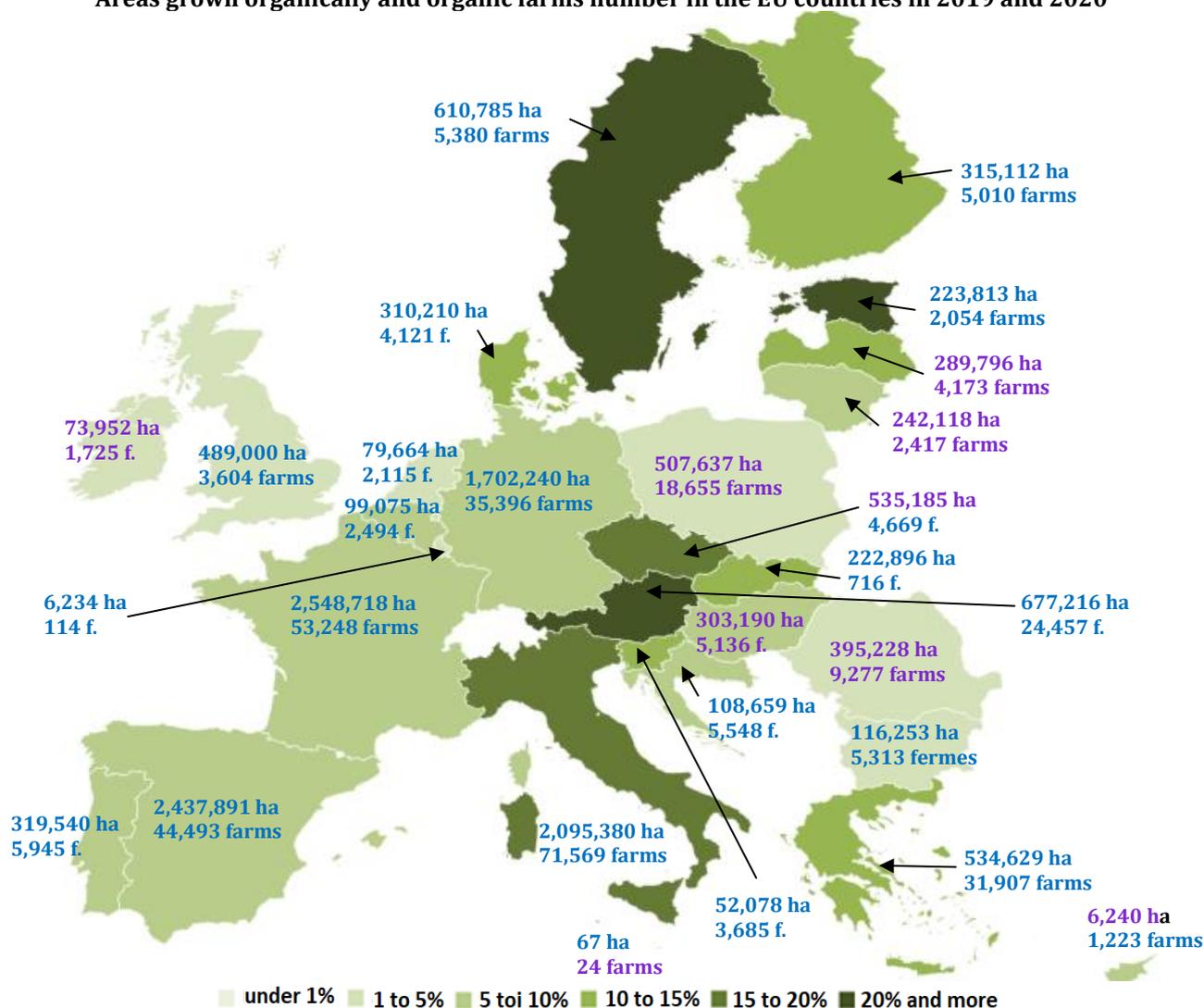
The development and characteristics of organic agricultural production

Growth went on in 2019 and 2020

■ Areas grown organically in the European Union increased by 6.3% in 2019, approaching 14.7 million hectares. Organic represented about 8.1% of the EU Utilised Agricultural Area in 2019¹. Late 2019, 343 605 organic farms were listed in the EU, an increase of 5.4% compared to 2018.

According to our estimates, more than 354,000 organic farms cultivated more than 15.3 million hectares in the EU in 2020.

Areas grown organically and organic farms number in the EU countries in 2019 and 2020



Legend: under 1% (lightest green), 1 to 5% (light green), 5 to 10% (medium green), 10 to 15% (darker green), 15 to 20% (dark green), 20% and more (darkest green)

In purple: 2019 and in blue: 2020

Source: Agence BIO/Many European sources

¹ - 8.5 % without UK

ORGANIC SECTOR IN THE EUROPEAN UNION



Areas grown organically and organic farms in the EU countries in 2019 and first data for 2020

Countries	2019					2020				
	Area grown organically (ha)	Change 2019/2018	Share of the UAA grown organically	Organic Farms Number	Change 2019/2018	Area grown organically (ha)	Change 2020/2019	Share of the UAA grown organically	Organic Farms Number	Change 2020/2019
Spain	2 354 916	4,8%	9,3%	41 838	5,9%	2 437 891	3,5%	10,0%	44 493	6,3%
France	2 283 661	13,6%	8,5%	47 261	13,5%	2 548 718	11,6%	9,5%	53 248	12,7%
Italy	1 993 236	1,8%	15,8%	70 540	1,8%	2 095 380	5,1%	16,6%	71 569	12,7%
Germany	1 613 834	6,1%	9,7%	34 110	7,6%	1 702 240	5,5%	10,2%	35 396	3,8%
Austria	669 921	5,1%	26,1%	24 225	3,2%	677 216	1,1%	26,4%	24 457	1,0%
Sweden	614 280	0,8%	20,4%	5 658	0,1%	610 785	-0,6%	20,3%	5 380	-4,9%
Czech Republic	535 185	2,9%	15,4%	4 694	2,0%				4 669	-0,5%
Greece	528 752	7,3%	10,3%	31 967	8,0%	534 629	1,1%		31 907	-0,2%
Poland	507 637	4,7%	3,5%	18 655	-2,9%					
United Kingdom	485 200	2,4%	2,7%	3 617	0,0%	489 000	0,8%	2,8%	3 604	-0,4%
Romania	395 228	21,1%	2,9%	9 277	8,9%					
Finland	306 756	3,4%	13,5%	5 039	0,0%	315 112	2,7%	13,9%	5 010	-0,6%
Hungary	303 190	44,8%	5,7%	5 136	30,7%					
Denmark	301 481	7,9%	11,3%	4 016	5,9%	310 210	2,9%	11,7%	4 121	2,6%
Portugal	293 213	37,6%	8,2%	5 637	8,1%	319 540	9,0%		5 945	5,5%
Latvia	289 796	3,4%	14,8%	4 173	0,0%					
Lithuania	242 118	1,0%	8,1%	2 417	-2,4%					
Estonia	224 161	6,7%	22,0%	2 060	5,7%	223 813	-0,2%	23,0%	2 054	-0,3%
Slovakia	197 565	2,8%	10,3%	802	49,9%	222 896	12,8%		716	-10,7%
Bulgaria	117 779	-27,4%	2,3%	5 942	-10,8%	116 253	-1,3%		5 313	-10,6%
Croatia	108 169	4,8%	7,2%	5 153	17,8%	108 659	0,5%	7,2%	5 548	7,7%
Belgium	93 099	4,6%	6,9%	2 378	5,4%	99 075	6,4%	7,2%	2 494	4,9%
Netherlands	75 205	5,4%	4,3%	2 076	3,3%	79 664	5,9%		2 115	1,9%
Ireland (2017 for farms)	73 952	-37,7%	1,6%	1 725	unknown			1,8%		
Slovenia	49 638	4,4%	10,3%	3 828	2,3%	52 078	4,9%		3 685	-3,7%
Cyprus	6 240	3,6%	5,0%	1 252	0,2%				1 223	-2,3%
Luxemburg	5 814	0,6%	4,6%	105	1,9%	6 234	7,2%	5,2%	114	8,6%
Malta	55	17,0%	0,5%	24	26,3%	67	21,8%			
Total UE	14 670 081	6,3%	8,1%	343 605	5,4%					

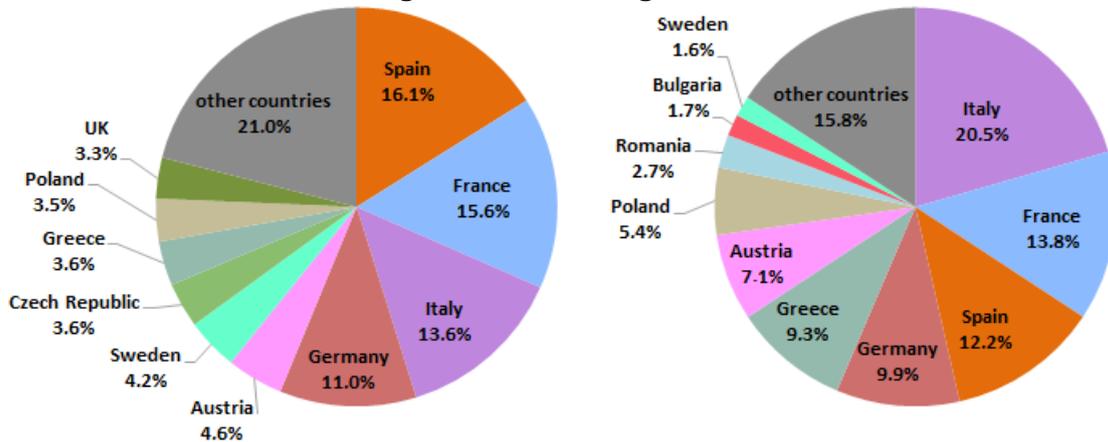
Sources: Agence BIO, Bio Austria, Bionext, Biowallonie, BÖLW, Denmark Statistics, Eurostat, FIBL/IFOAM, Grüner Bericht, Jordbruksverket, Ministries of Agriculture of Croatia, Estonia, Germany, Greece, Slovenia, Spain and United Kingdom, Austrian Ministry of Sustainability and Tourism, Pro Luomu, Organic Estonia, SINAB and SKAL.



■ In 2019:

- ▶ 56% of the EU organically grown areas and of organic farms were in 4 countries: **Spain**, **France**, **Italy** and **Germany**.

Breakdowns of areas grown areas and organic farms in the EU in 2019



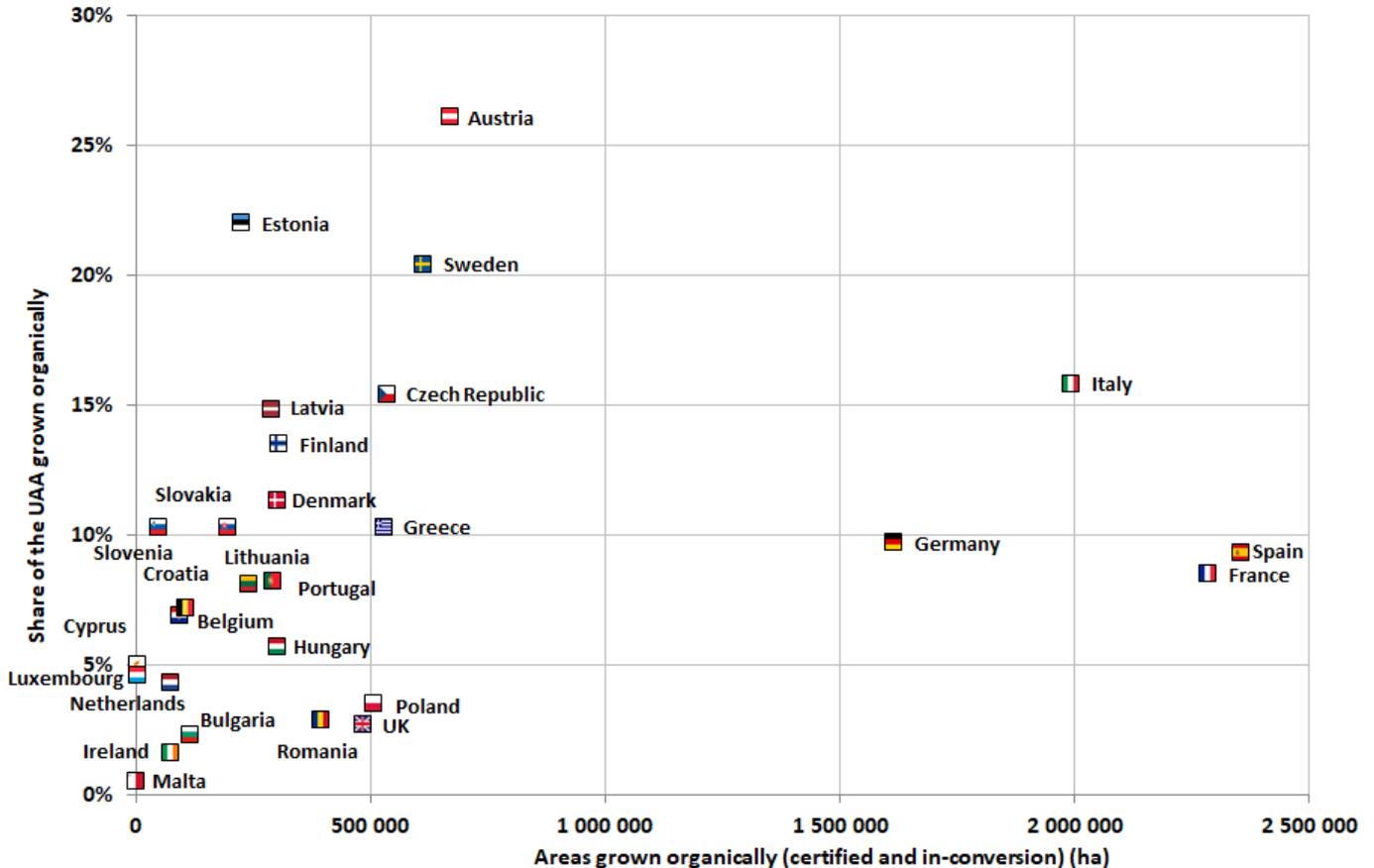
Source: Agence BIO/Many European sources

- ▶ France in the EU: In 2019, with nearly 16% of the EU organically grown areas, **France** was in second position regarding agricultural areas grown organically, behind **Spain**, but it only ranked 14th for the organic share. In 2020, France overtook Spain, becoming the leading EU country for areas grown organically.





Areas grown organically and share of the UAA grown organically in each EU country in 2019

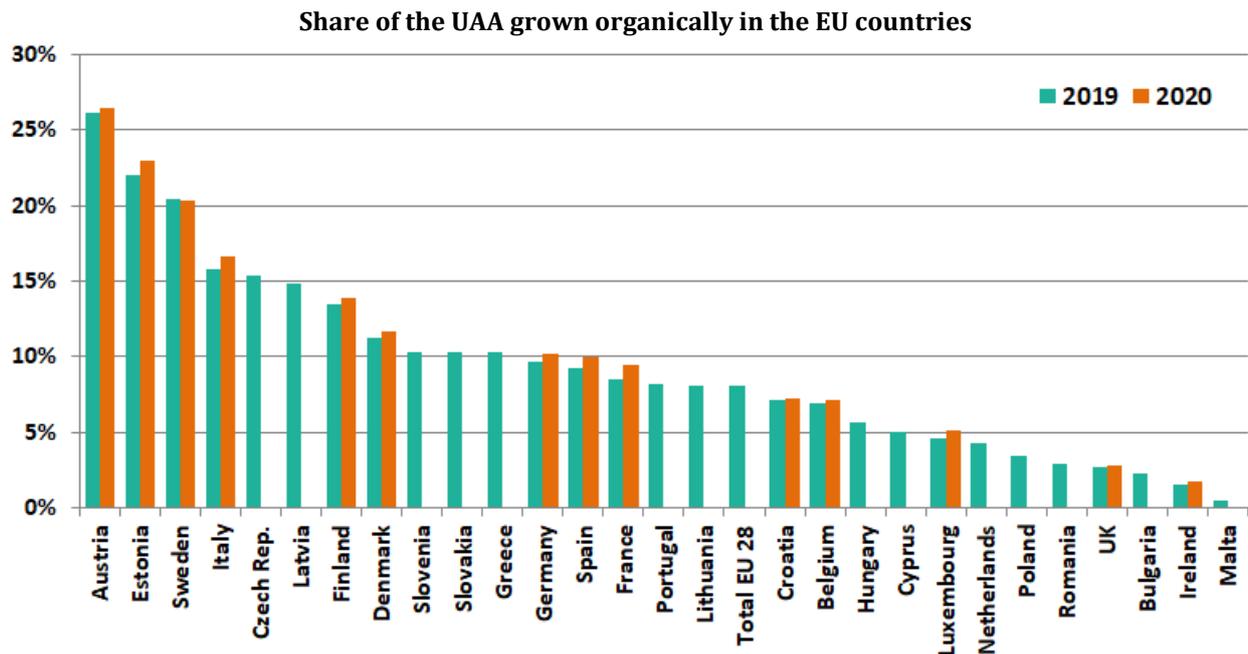


Source: Agence BIO/Many European sources

8.1% of the EU agricultural area was grown organically in 2019.

■ This share varied greatly from one country to another. With an organic share of 26.1% in 2019, **Austria** remained the EU country where it was the highest. It was followed by **Estonia** (22.0%), **Sweden** (20.4%), **Italy** (15.8%) and the **Czech Republic** (15.4%). In 2019, the share of UAA grown organically was above 10% in 11 countries.





Source: Agence BIO/Many European sources

Main developments between 2000 and 2020

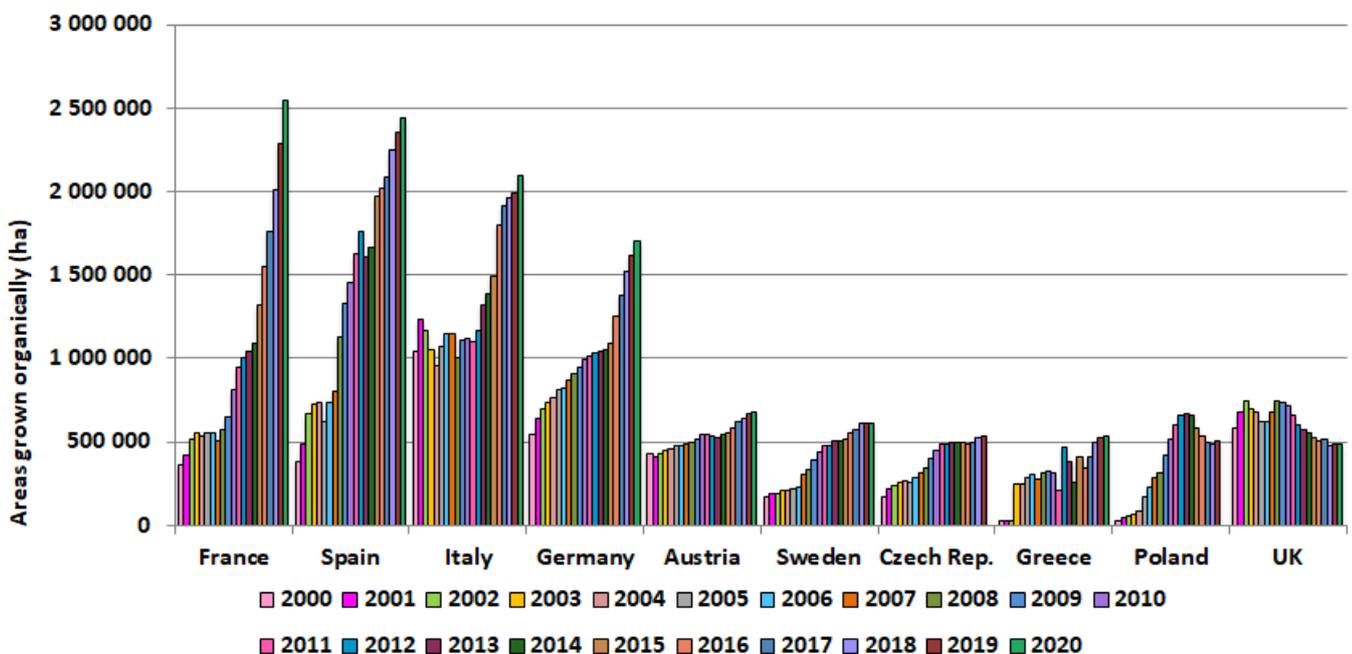
- Globally, the EU areas grown organically more than tripled between 2000 and 2020¹. During the period 2012-2019, growth was especially strong and the organic share increased from 5.7% to 8.1%.
- The situation has evolved more or less quickly and more or less regularly depending on the country.
- In **Spain**, organically grown areas have been more than multiplied by 6 in 20 years, exceeding 2.4 million ha in 2020. After falling in 2013, they have increased since 2014, which is more due to the development of exports than to that of the Spanish market. With more than one million hectares, Andalusia represented 45% of the areas grown organically in Spain in 2020.
- In twenty years, the areas grown organically in **France** have multiplied by 7, exceeding 2.5 million ha in 2020. Organic farming appears attractive, thanks to more stable prices than conventional, more profitable production and the strong growth of the French organic market. In 2020, 22% of French areas grown organically were in Occitania.
- After oscillating from one year to the next, **Italian** areas have been growing since 2012. In twenty years, they have doubled to reach nearly 2.1 million ha in 2020. Sicily represented 18% of Italian areas grown organically in 2020. The first four regions, adding Puglia, Calabria and Tuscany, represented almost half of the areas.

¹ - Calculation for EU 28



- The areas grown organically in **Germany** have tripled in twenty years, exceeding 1.7 million ha in 2020. From 2000 to 2015, their growth was fairly modest but steady. It accelerated from 2016. Bavaria is the main organic region, it represented 23% of German areas grown organically in 2020.
- In **Austria**, areas increased by 58% between 2000 and 2020. After a decrease between 2010 and 2013, they started to grow again. In 2019, Lower Austria represented 32% of the Austrian areas grown organically.
- In **Sweden**, the areas grown organically have more than tripled between 2000 and 2020.
- In the **Czech Republic**, the areas grown organically have more than tripled in nineteen years.
- Globally, the areas grown organically in **Greece** have been almost multiplied by 22 in 20 years, but their evolution was very irregular.
- In **Poland**, the areas grown organically increased by 23 between 2000 and 2019. They reached a peak in 2013, approaching 670,000 ha, but then fell again.
- In the **United Kingdom**, areas fell by 16% between 2000 and 2020. After a decline of several years, they started to grow again in 2019.

Evolution of areas grown organically (certified organic areas and in-conversion) in the top 10 EU countries since 2000



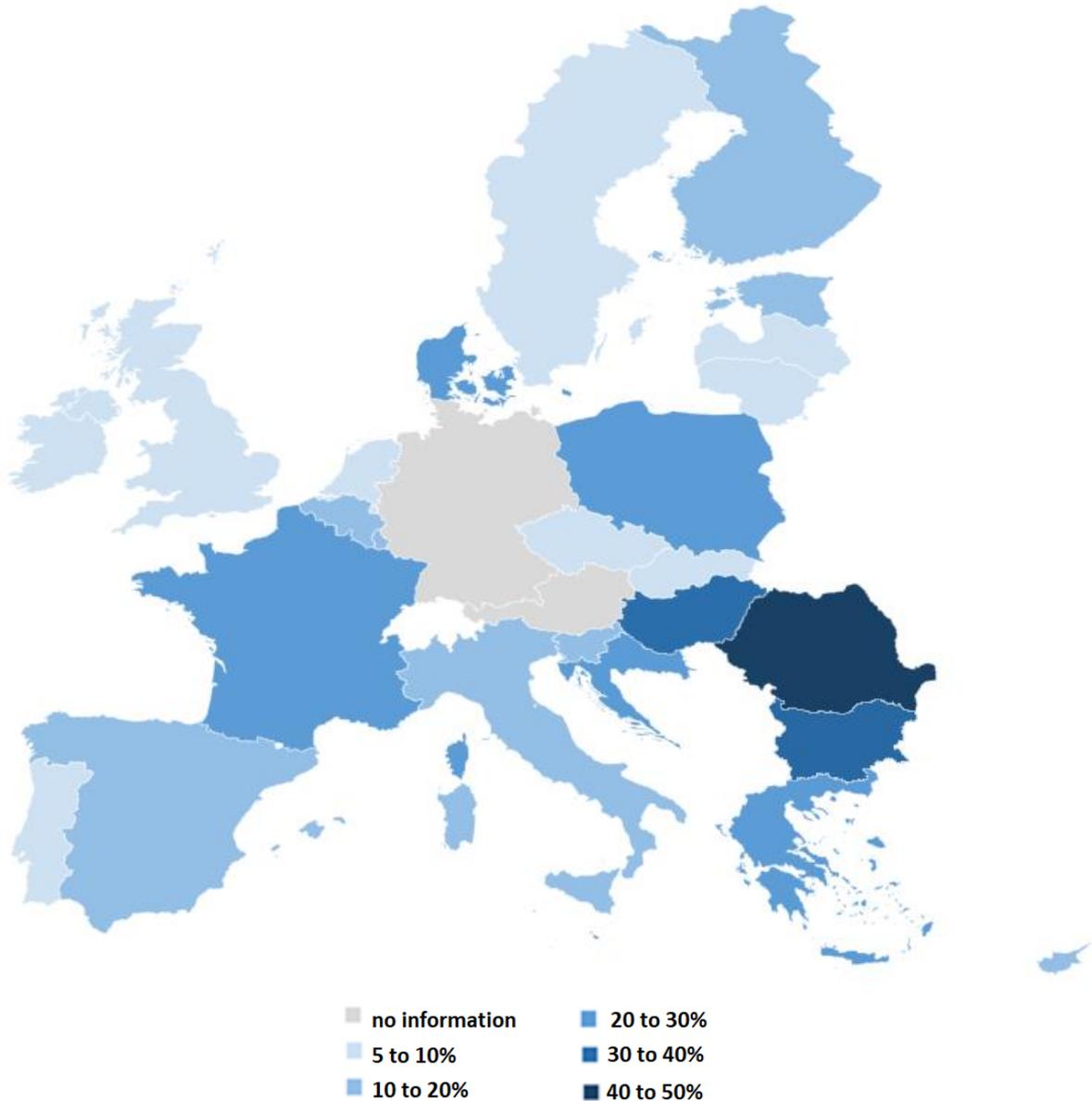
Source: Agence BIO/Many European sources



A share of in-conversion areas high in a large number of countries

■ In 2019, it exceeded 40% in **Romania** (46%), while it was less than 10% in **Ireland, Latvia, Lithuania, the Netherlands, Portugal, the United Kingdom, Czech Republic, Slovakia** and **Sweden**.

Share of the areas grown organically that were in conversion in 2019

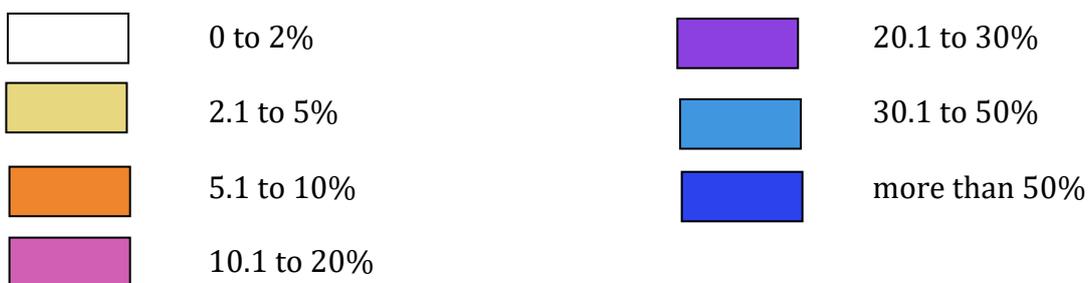
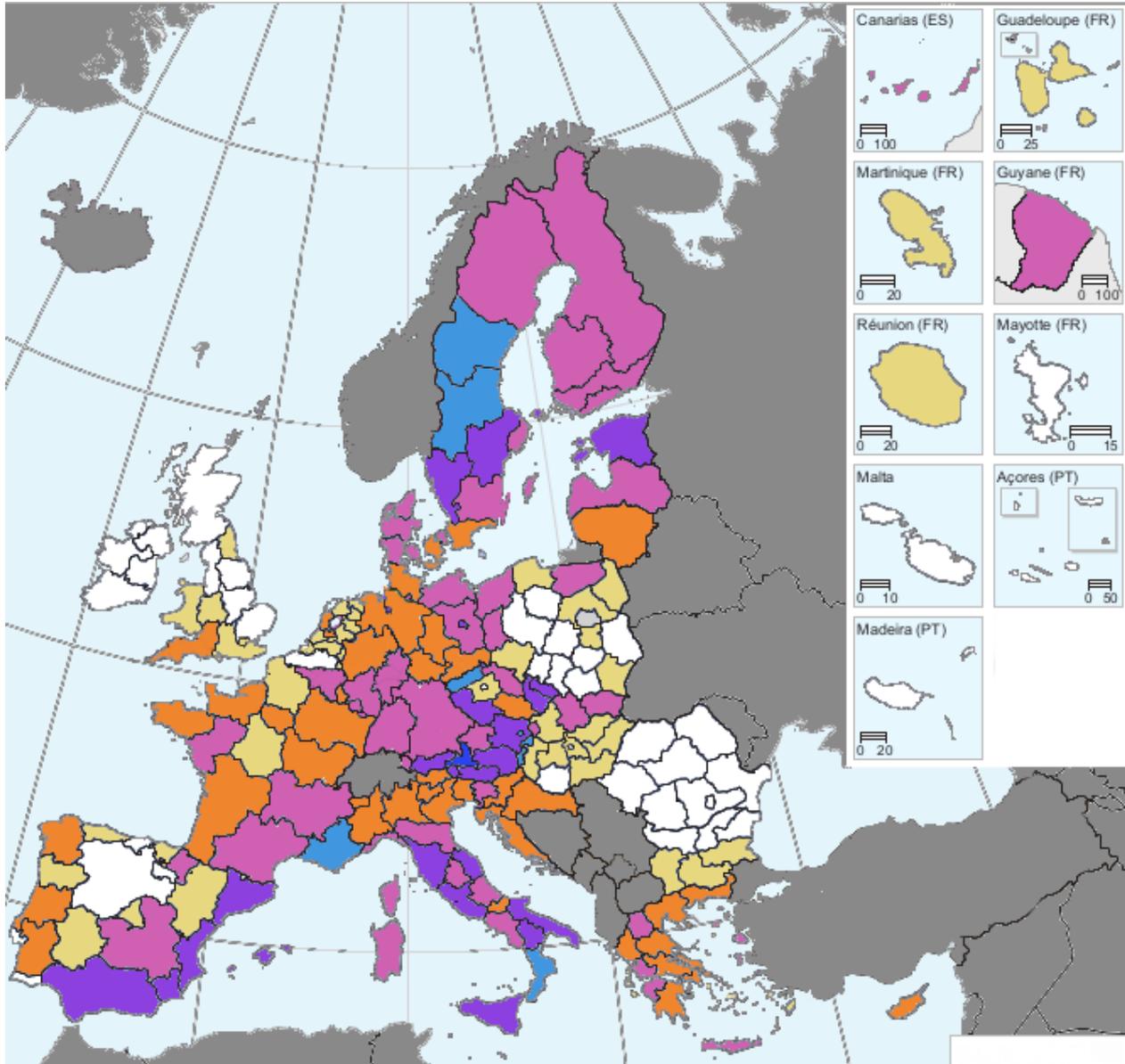


Source: Agence BIO/Many European sources



Significant regional specificities within each country

Share of areas grown organically (certified and in-conversion) in the UAA at regional level



NB: Data 2020 for Austria, Belgium, Croatia, Finland, France, Germany, Greece, Luxemburg and Sweden. Data 2019 for Cyprus, Czech Republic, Denmark, Estonia, Italy, Latvia, Lithuania, Malta, the Netherlands, Poland, Spain and the United Kingdom. Data 2018 for Slovakia. Data 2016/2017 for Portugal. Data 2016 for Bulgaria, Hungary, Ireland, Romania and Slovenia.

Source: Agence BIO/Many European sources



- The share of UAA grown organically is very high in some regions. It was:
 - ▶ more than 50% in the region of Salzburg (Austria),
 - ▶ more than 30% in Burgenland and in the region of Vienna in Austria, in Calabria in Italy, in two Estonian regions: Lääne-Eesti and Kirde-Eesti, in two Swedish regions: Norrland Central and Centre-Nord, in Provence-Alps-Côte-d'Azur in France and in the North-West of the Czech Republic,
 - ▶ between 25 and 30% in Tyrol and Carinthia in Austria, in the region of Bremen in Germany, in Moravia-Silesia in the Czech Republic and in Sicily,
 - ▶ between 20 and 25% in Louna-Eesti in Estonia, in the Åland Islands in Finland, in five Italian regions: Lazio, Marche, Tuscany, Basilicata and Apulia, in five Spanish regions: Andalusia, Murcia, Balearic Islands, Catalonia and Valencia, in two Swedish regions: West and Centre-East, in two Austrian regions: Styria and Lower Austria, in the region of Berlin, in Central Moravia and in the southwest of the Czech Republic,
 - ▶ between 15 and 20% in two Austrian regions: Voralberg and Upper Austria, in Pohja-Eesti in Estonia, in Hesse and Saarland in Germany, in Helsinki-Uusimaa and Northern and Eastern Finland, in Eastern Slovakia, in Corsica and Occitania in France, in two Swedish regions: Småland and Islands and Stockholm, in two Spanish regions: Navarre and Canary Islands, in two Greek regions: East Macedonia and North Aegean and in Emilia-Romagna in Italy,
 - ▶ between 10 and 15% in central Slovakia and in the region of Bratislava, in Keski-Eesti in Estonia, in several German regions: Baden-Württemberg, Brandenburg, Mecklenburg-Western Pomerania, Bavaria, Hamburg and Rhineland-Palatinate, in Castile- La Mancha in Spain, in five Italian regions: Campania, Umbria, Liguria, Abruzzo and Sardinia, in Upper Norrland in Sweden, in four Danish regions: North Jutland, South, Capital Region and Central Jutland, in three Polish regions : West Pomerania, Lubusz Voivodeship and Warmia-Mazury, in the North-East of the Czech Republic, in three French regions: Auvergne-Rhône-Alpes, Pays de la Loire and Guyana, in Flevoland in the Netherlands, in Western Greece and Crete, in Wallonia in Belgium and in Southern and Western Finland.
- On the other hand, it was under 1% in Northern Ireland in the United Kingdom, in several regions of Poland: Kuyavian-Pomeranian, Voivodeship of Łódź and Opole and Silesia, in the Azores in Portugal, in the South and East of the Republic of Ireland, in the region of Prague in the Czech Republic, in five Romanian regions: North West, Center, North East, South East and South West and in Malta.



Other operators in the organic sector

A heterogeneous development of the processing of organic food

- Nearly 65,600 organic food processors were identified in the EU in 2019.
- The 3 main categories of processed organic products are fruits & vegetables, cereals and milk.

■ In 2019, **France** was in first place with 18,255 organic processors, i.e., 28% of organic processors listed in the UE, ahead of **Germany** with 16,162 (25%). In 2020, France has exceeded 19,000 organic processors.



■ The number of organic processors is increasing in most countries. However, there are strong differences from one country to another. It remains fairly low in the countries of Central and Eastern Europe (6% of EU organic processors in 2019).

■ In **Italy**, organic products are processed mainly in the south of the country (Sicily, Apulia and Calabria), while in **Spain** organic processors are mainly in Andalusia.

Importers and exporters of organic products

■ The EU had nearly 5,800 organic importers in 2019. **Germany** represented 32% of organic importers from the EU in 2019, far ahead of **France** (11%), **Italy** (9%) and **Spain** (6%).

■ The European Union had more than 3,100 organic exporters in 2019. This figure is underestimated because the number of organic exporters from **France** is not known. **Germany** represented 41% of organic exporters identified in the EU in 2019 and **Italy** 24%.



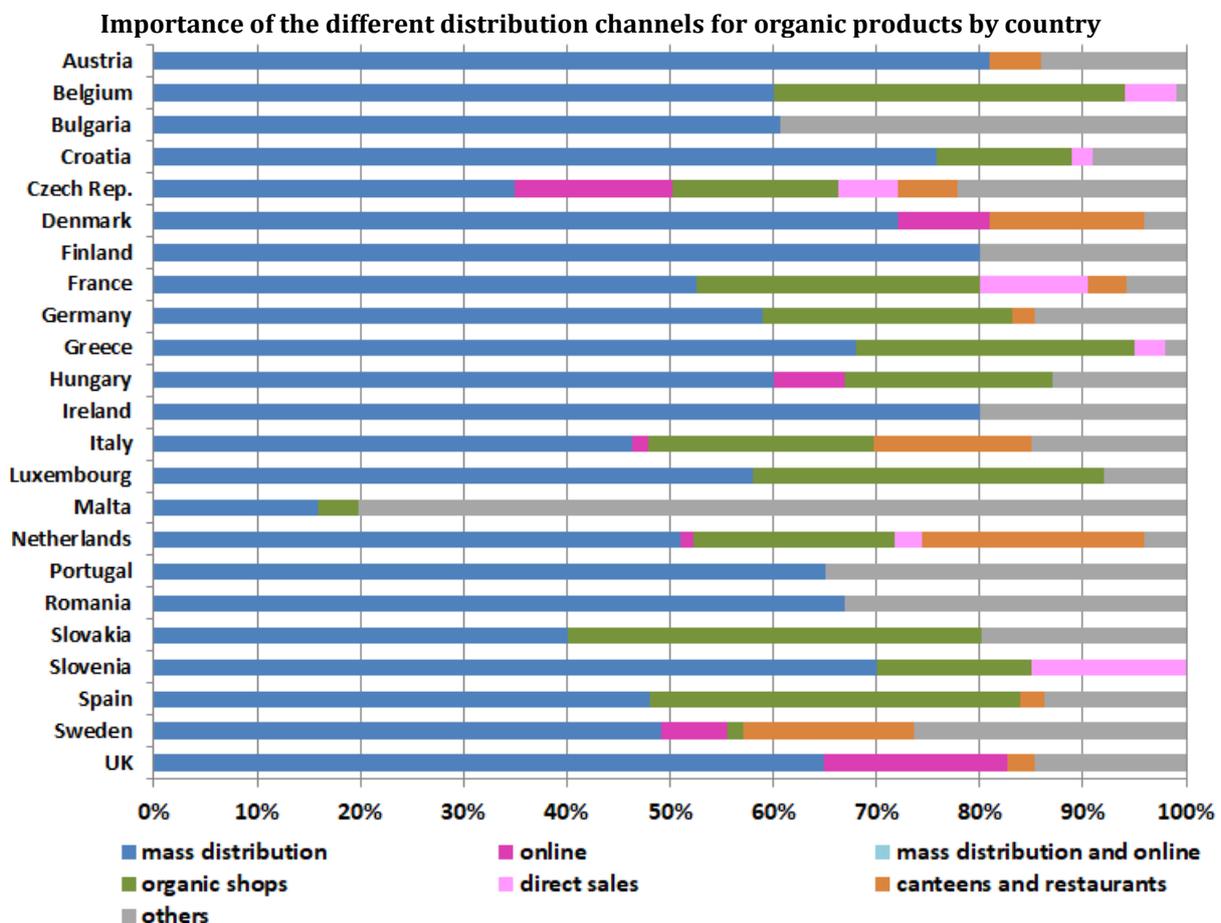


Characteristics and developments of the organic market

■ Since 2004, the EU organic market has experienced significant growth¹. In recent years, the development of the EU organic market has accelerated. The main reasons are an increased awareness of the links between food and health and a greater interest of EU consumers in sustainable development.

More or less diversified and structured distribution channels

■ In a number of countries, such as **France** and **Germany**, the organic market has started to develop with organic shops. In other countries, such as **Denmark**, the **United Kingdom** and **Austria**, mass distribution has been the main driver for the development of the organic market. In other countries where organic consumption is still modest, development is also done mainly through supermarkets.



N.B.: Data are not available for all Member States. For the UK, the online category includes online and boxes sales, so it is slightly overestimated in this graph. In Ireland, the supermarkets dominate, but the precise breakdown between the channels has not been analysed.

Source: Agence BIO/Many European sources

1- The economic crisis of 2008/2009 had relatively little impact on the growth of this sector, except in the United Kingdom.



■ We can distinguish:

- ▶ The countries where the distribution is relatively diversified but where large-scale distribution has the most important weight: Germany, Belgium, Spain, France, Italy, Luxemburg, the Netherlands, Czech Republic and Sweden.
- ▶ Countries where large retailers clearly dominate: Austria, Bulgaria, Cyprus, Croatia, Denmark, Finland, Greece, Hungary, Ireland, Portugal, Romania, the United Kingdom and Slovenia.

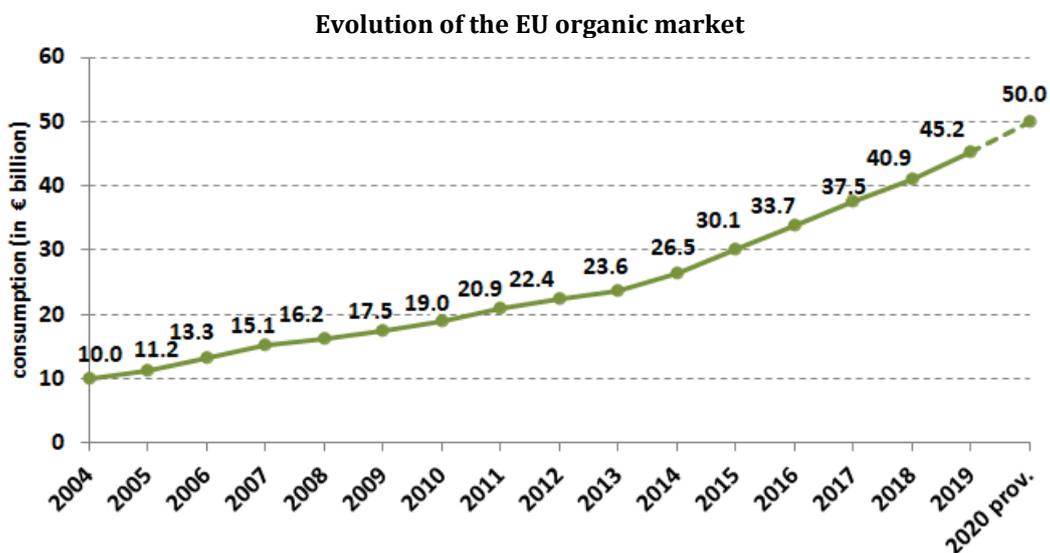


■ According to *Ecozept*, the organic markets with a more diversified distribution are evolving in a more stable way. They are in fact better able to resist possible fluctuations.

■ **Germany, France** and **Italy** are the countries with the most organic shops.

The organic consumption continues to increase.

■ The consumption of organic products was estimated at nearly € 45.2 billion for 2019, an increase of 10.3% compared to 2018. It more than quadrupled between 2004 and 2019. Our provisional estimate for the European Union for 2020 is over € 50 billion.

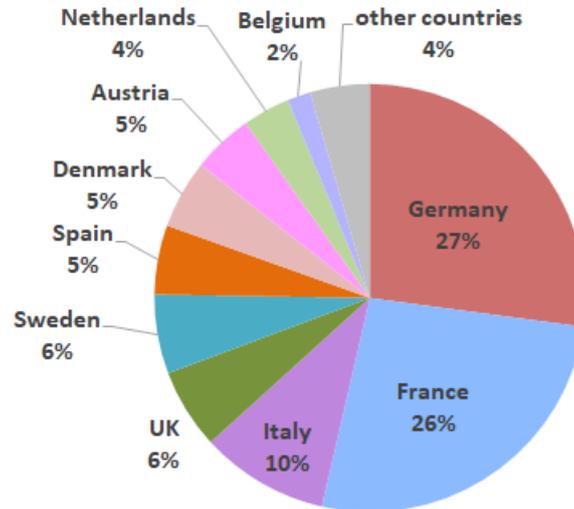


Source: Agence BIO/Many European sources



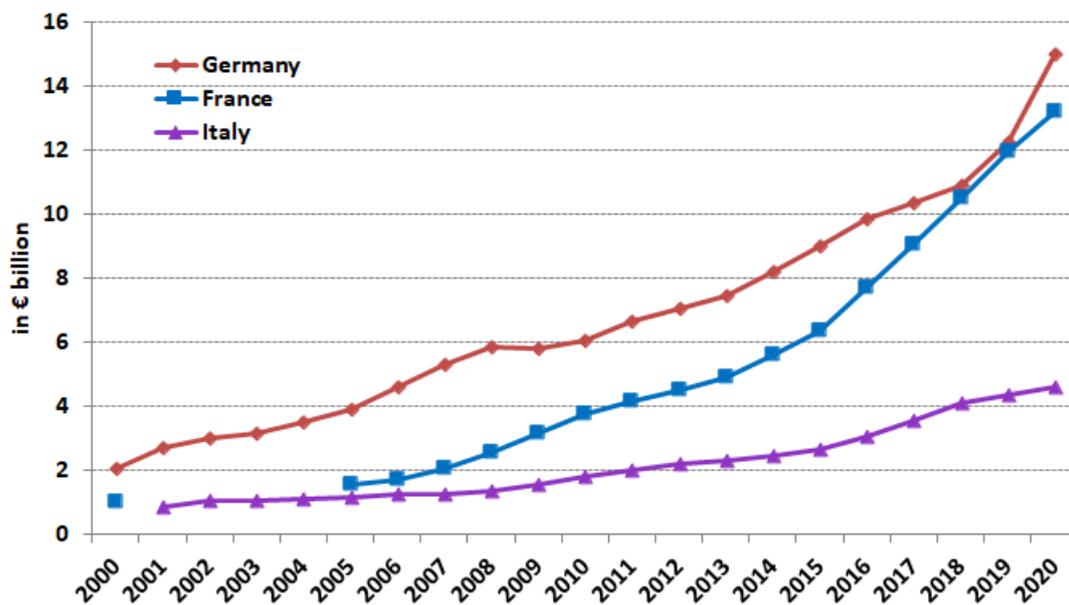
■ 54% of organic products (by value) were consumed in 2 countries in 2019: **Germany** and **France**.

Breakdown of the EU organic market in 2019



Source: Agence BIO/Many European sources

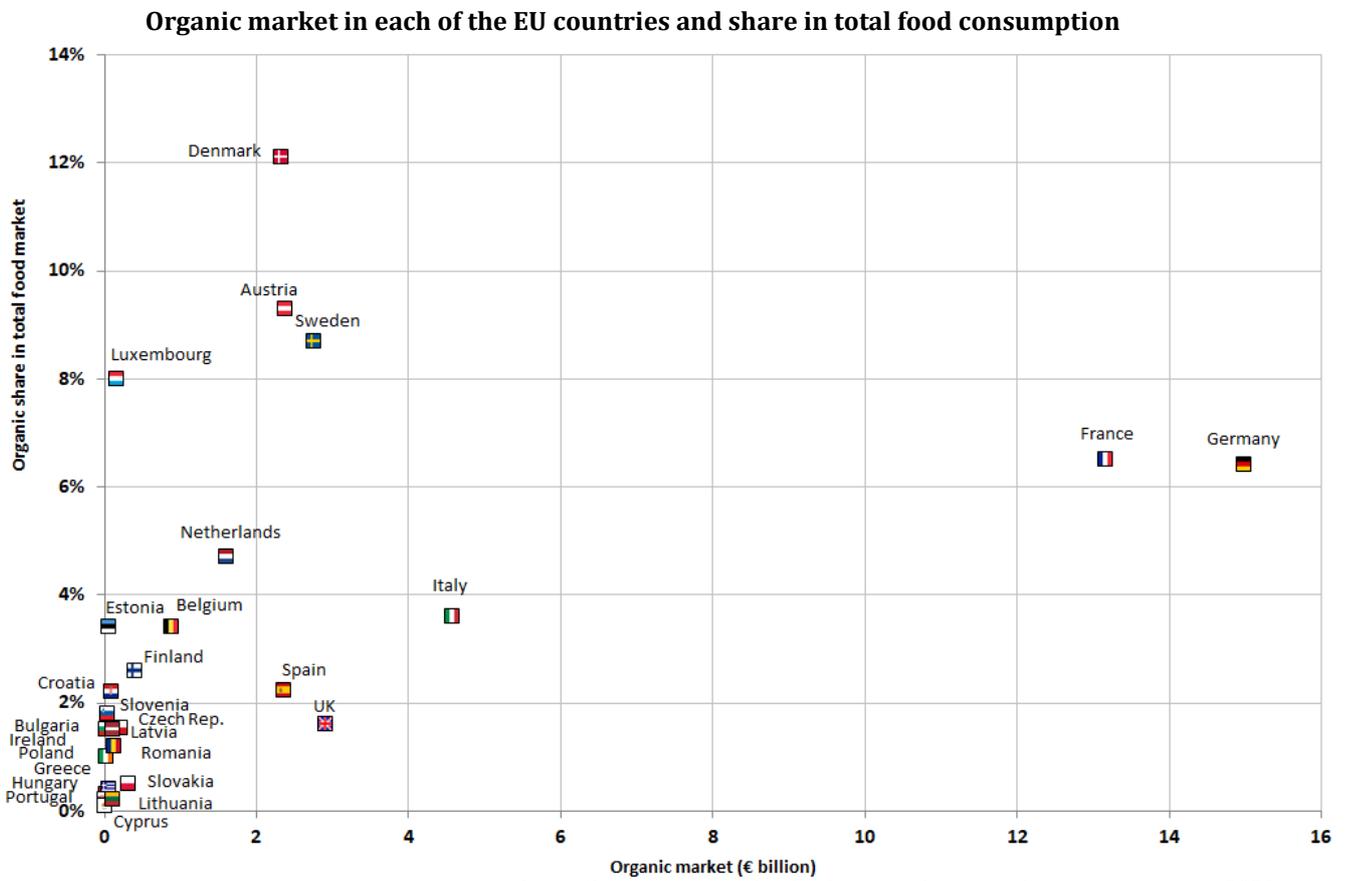
Evolution of the 3 main EU organic markets (in € billion)



Source: Agence BIO/Many European sources



- **Denmark** is the country where the organic share in food purchases is the highest (13% in value in supermarkets & online in 2020).



NB: The figure for the entire Danish organic market is not yet known for 2020.
 Source: Agence BIO/Many European sources



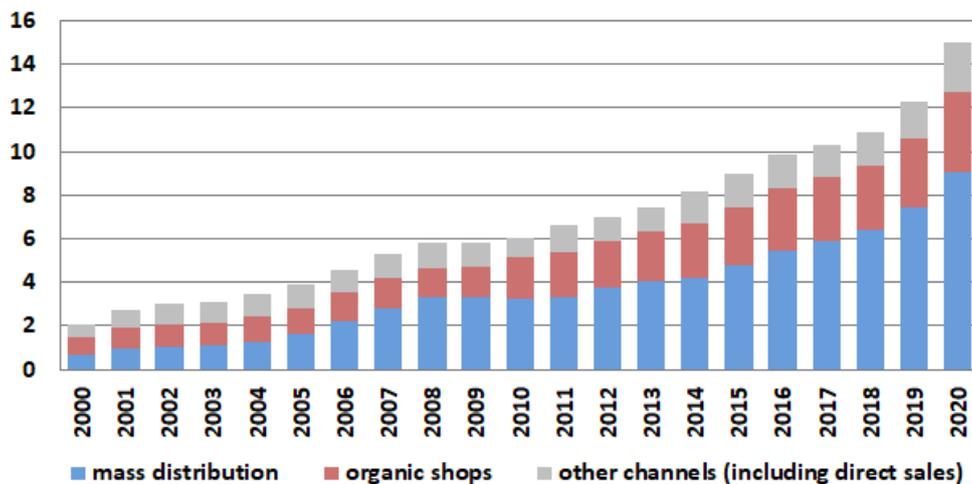


Focus on the 10 main organic markets of the European Union

■ Germany: First EU organic market

The German organic market has multiplied by 7.3 in twenty years and by 2.5 in ten years, reaching € 14.99 billion (excluding out-of-home) in 2020. The organic market grew by 22.3% in 2020 (+12.4% in 2019). The pandemic has caused an increase in demand for organic products. The organic market share was estimated at 6.4% for the year 2020¹.

Evolution of the German organic market (excluding out-of-home) (in € billion)



NB: "Other channels": bakeries, butchers, fruits & vegetables stores, weekly markets, farm sales, basket subscriptions, mail order, service stations and health food stores (including Reformhäuser). "Organic shops": include large farm stores (with more than € 50,000 of sales).

Source: Agence BIO/Many European sources

Large retail (hard discount² and drugstores included) is the main channel for organic. These are mainly supermarkets³. Mass distribution share increased sharply between 2000 and 2020, reaching 60.4% in value (against 33.2% in 2000). Organic sales in this channel grew by 22.0% in 2020 compared to 2019. They continued to grow during the first half of 2021.

Since late 2000s, this channel has engaged in a more qualitative approach. The stores have been embellished and modernized, even in hard discount. Mass distribution communicates a lot on sustainable development. Organic products occupy a central place in this strategy. There is an over-representation of organic in the communication of chains, especially at *Aldi*.

Between 2017 and 2021, large retail continued to increase its organic range under national brands and private labels. In 2020, the *Edeka*⁴ stores had an organic range of more than 430 items under the *Edeka Bio* private label, 800 under the *Alnatura* brand, as well as organic products from national brands⁵. In 2021, *Edeka* became the leading distributor of organic products in Germany, overtaking *Aldi*. The latter has created a new private label: *Gutbio*. *Aldi Süd* expanded its organic range in 2020 and now sells 450 organic products compared to just over 300 previously. Organic products represented around 30% of *Tegut* sales in 2020. Its organic range exceeded 7,000 items, including 60 under a new entry-level organic private label.

1- This is a provisional estimate.

2- Hard discount stores are dominant in German mass distribution. The two main chains are *Aldi* and *Lidl*.

3- Hypermarkets have not developed because food stores are generally inside cities.

4- *Edeka* is the main supermarkets group in Germany with its 2 chains: *Edeka* and *Netto*.

5- *Edeka* has a partnership with *Demeter*, in particular for *Edeka Bio baby food*.



Globus had a range of over 4,500 organic products. *Lidl* permanent organic range consisted of 325 items.

For several years now, distributors have been cooperating with organic associations to develop their range and gain credibility: *Lidl* and *Edeka* with *Bioland*, *REWE* with *Naturland* and *REWE*, *Kaufland/Real* and *Edeka* with *Demeter*.

In 2019, *Edeka* launched its first organic supermarket under the name *Naturkind* in Hamburg¹. This point of sale has around 7,000 organic references.

Organic distribution includes organic shops and large farmers shops. In 2018, there were nearly 2,600 organic shops including more than 600 organic supermarkets, around 1,200 health food shops and more than 300 large organic producers' shops. In 2018, the total sales area of organic distribution exceeded 664,000 m². Organic distribution represented 24.7% of the German organic market in 2020 (38% in 2020). Its sales increased by 16.4% in 2020, almost double of 2019 growth. According to *Klaus Braun's* barometer, sales of organic products in organic distribution increased by 4.6% in the first quarter of 2021 compared to the first quarter of 2020 and by 2.1% in the second quarter of 2021.



Denn's is one of the leading organic shops chains. The organic chain *Alnatura* has around a hundred points of sale². In 2020, *Alnatura* sales exceeded € 1 billion for the first time.

According to *Ekozept*, organic shops weaknesses are diverse: little differentiation from conventional supermarkets, competition between chains on prices, lack of communication, little products innovation, no strategy to build loyalty customers, staff often insufficiently trained, too weak links with the producers... There is also competition between organic shops to occupy attractive locations, to the detriment of independent shops.

According to the *BÖLW*, independent organic shops and organic supermarket chains seem to be doing better than chains of small organic shops. In recent years, most of the newly created shops have a restaurant area.

In 2020, the pandemic accelerated the growth of organic sales online.

In 2019, *AMI* identified 768 bakeries with an organic range and 349 butcher shops with organic meat³.

According to the *GfK panel*, more than 96% of German households bought an organic product at least once in 2019. According to *PwC*, 24% of consumers bought mainly organic products in 2020. According to the 2020 edition from the *Ökobarometer*, 37% of respondents said they regularly buy organic products.

According to *Mintel Global New Products Database*, three quarters of German consumers would like to have a greater choice of organic food products.

According to *GfK*, around a fifth of all consumers can be described as "organic buyers without compromise": 70% of their food budget is spent on organic products. They mainly live in southern Germany and in Berlin.

Animal welfare remains the main reason to buy organic. Today, around 9.3 million Germans are vegetarians/vegans. In 20 years, meat consumption fell by 8 kg/person. This has a strong

1- Mass-distribution have so far never succeeded in establishing a sustainable organic chain

2- *Alnatura* products are also sold by supermarkets. It is the first organic brand, with more than 1,300 organic references.

3- Bavaria is the Land with the most craftsmen with organic products.



impact on sales of organic vegetarian and vegan products. The fight against climate change is emerging as an increasingly important reason to buy organic products.

According to the *Thünen Institute*, the main reasons to buy organic products for 18–30-year-olds are to have fun and take care of their body.

According to *Business France* and the *Ökobarometer*, since the start of the pandemic, Germans have shown growing interest in regional and high-quality products.

Price is the main brake for young consumers.

The most purchased organic products are eggs, dairy products, vegetables and fruits. Banana is Germans' favourite organic fruit.

■ **France:** Second EU organic market

The French organic market reached € 13.2 billion in 2020 (out-of-home catering included). It has been multiplied by thirteen in twenty years. Between 2012 and 2020, organic consumption development accelerated, it has in fact almost tripled during this period. In 2020, the organic market grew by more than 10% compared to 2019. This is the 7th consecutive year of double-digit growth.

The organic market share (excluding out-of-home) reached 6.5% in 2020 (6.1% in 2019).

Large retail represented 52.6% of the French organic market in 2020, followed by organic shops (27.4%), direct sales (10.4%), craftsmen-shopkeepers³ (5.7%) and out-of-home sector (3.8%).

From 2011 to 2016, the organic sales growth in large retail was lower than in other channels. 2017 marked a turning point, mass distribution has been able to adapt to consumer expectations: it has developed its organic range (under private label¹ and national brands) in general and more specifically in their convenience store and the drive. In 2020, mass distribution sales continued to grow: +11.9%. The pandemic has encouraged the purchase of organic products in drive² and, to a lesser extent, in convenience stores, to the detriment of hypermarkets. However, these remained the main segment of large retail, with a market share of nearly 42%, ahead of supermarkets (29%). Hard discount was the smallest segment in 2020 with a 5% share. During the first half of 2021, sales of organic fixed weight³ products in mass retail⁴ fell by 2.3% overall compared to the first half of 2020. The drop in organic sales was a little stronger in the second quarter than in the first.

In 2019 and 2020, *Carrefour* was the chain that sold the most organic products, while *Monoprix* was the one in which the organic market share was the highest in 2020 (over 9%). *Carrefour* and *Casino* were the chains that have the most organic private label products in 2020 with 1,000 each, ahead of *Leclerc* (750) and *Monoprix* (700).

Since 2018, the *Carrefour* group has started to set up giant organic departments in some of its hypermarkets (currently around 30). These stores sell more than 3,000 organic products over an area of more than 500 m².

In recent years, several supermarket chains have launched organic shops chains. Their success remains mixed.

1- In 2020, private labels represented 41% of supermarkets organic range.

2- The pandemic has accelerated the growth of online food shopping. According to Nielsen, 26% of French households bought some food online during the 8 weeks of the first lockdown.

3- Excluding still wines

4- hypermarkets, supermarkets, hard-discount, convenience stores and drive



According to *IRI*, organic products are now essential in large retail and are an engine of growth for retail outlets.

According to Nielsen, the French are buying increased categories of organic products from mass retail.

Like their elders, the younger generations (Y and Z) mainly buy organic food in mass distribution. Nevertheless, they are more numerous than their elders to use the drive and to buy organic food online.

In France, organic distribution has been developed for a long time. It was here that the first organic chain (*La Vie Claire*¹) and the first organic supermarkets were born. Today there are around 15 organic chains. We can distinguish 3 concepts: associations for marketing and purchasing (*Biocoop*² and *Biomonde*), national chains (*La Vie Claire*, *Naturalia*, *Bio C'Bon*...) and regional chains (*Marcel et Fils*, *Les Nouveaux Robinson*...). The main organic chains are *Biocoop*, *Les Comptoirs de la Bio* and *La Vie Claire*. *Biocoop* has between 3,000 and 10,000 references in its shops.



Bio Linéaires estimated the number of organic shops in France at 3,091 late 2020. More than 2,300 of them belonged to 29 networks with more than 5 points of sale. Late 2020, the average area of organic shops was 258 m² and the total sales area reached 779,125 m².

In 2020, sales growth of this channel has been 13.1%, which is much higher than in 2018 and 2019³. In fact, only sales of network shops increased (+16.0%)⁴, while those of independent shops fell for the second year in a row (-3.4%).

According to *Kantar*, *Biocoop* is the French organic retailer that has benefited the most from food storage by the French.

Organic shops have had to start selling online. They were way behind the supermarkets. A number of organic chains have installed Click & Collect systems in many shops. This is the case of *Biocoop*, *Naturalia* and *Bio C'Bon*.

In recent years, organic shops have also developed their own brands. *La Vie Claire* was the organic chain with the most organic products under private label in 2020 (1,974), ahead of *Biocoop* (530). The private label of independent organic shops, *Elibio*, was launched in 2019. It has more than 70 references and is marketed in more than 400 shops.

In 2020, nearly half of French people lived within a 10-minute walk of an organic shop.

In 2020, direct sales were more dynamic than in 2019, with growth of 11.7%. Producers who sold on the markets had to find new ways to market their products: mobile grocery stores, farm drive, classic farm sales, farm markets, groupings on an Internet platform for ordering and delivery, AMAP⁵, etc. Initiatives have spread throughout France.

The craftsmen & shopkeepers' channel was up 11.3% in 2020⁶, benefiting from the commitment of many bakers.

The frozen food chain *Picard* has strongly developed its organic range in recent years (doubling between 2017 and 2019).

1- The first *La Vie Claire* shop was opened in 1948.

2- *Biocoop* was created in 1986.

3- 2018 : +7,7 % and 2019 : +7,4 %

4- Despite a noticeable slowdown in openings.

5- Most AMAPs continued to operate during lockdown.

6 Same evolution as in 2019.



In 2020, organic websites had to cope with a rapid rise. *Greenweez*, created in 2008¹ and with more than 20,000 references of organic or ecological products, saw its turnover increase strongly in 2020.

As in many other countries, the out-of-home sector has suffered greatly from the crisis due to health measures involving the closure of establishments and reduced attendance. Thus, purchases of organic products by the out-of-home sector fell by 21%.

Processed foods were the organic products with the most important growth of sales in 2020 compared to 2019 (especially beer, frozen foods and groceries).



Grocery products were the main organic products consumed in France in 2020, with 31% of organic consumption at home, ahead of fresh fruits & vegetables (17%).

According to the *Agence BIO/Spirit Insight Barometer*, more than 9 in 10 French people said they had consumed organic products in 2020. 71% of French people consumed them at least once a month in 2020 and 14% every day. However, according to *Nielsen*, currently 20% of French households (mostly senior and well-off, executives and Parisians) account for two out of three purchases of organic products. This panellist estimates that $\frac{3}{4}$ of organic growth is made with these same big buyers. *Nielsen* believes, however, that families with young children are also becoming heavy consumers of organic products because it is seen as a guarantee of preserving their children health.

According to *Nielsen* data, Paris is the French department with the highest consumption of organic products², ahead of Hauts-de-Seine, Hautes-Alpes, Haute-Savoie, Haute-Garonne, Loire-Atlantique and Alpes-Maritimes. On the opposite, Aisne, Pas-de-Calais and Ardennes are those where people consume the least organic products.

As in other EU countries, health and origin have become more important criteria of choice than before. The main reasons for consuming organic products in France are the preservation of health, the quality and taste of the products, the protection of the environment and animal welfare. Organic products appear to be a good way to combine individual requirements for well-being with the collective dimension of protecting the planet.

Price remains the main brake to the growth of the organic market, but younger people find it more normal than other generations to pay more for it. The second brake is the doubt that the product is completely organic. The third one is the lack of reflex to consume organic.

The pandemic has increased interest in local products, sometimes to the detriment of non-local organic products.

Young people are aware of the need to consume differently, in a more ethical, responsible and sustainable way, especially with regard to the value of the product.

■ Italy: an evolving organic market

Historically, organic production was mainly oriented towards export. However, the domestic market has grown a lot: it has almost quadrupled in fifteen years. During the year ending late July 2021³, the Italian organic market grew by 4.9% and reached € 4.57 billion⁴. The organic market share was 3.4% in hypermarkets and supermarkets.

1- It was bought by Carrefour in 2016.

2- Parisians consume 76% more organic than the national average.

3- In order to be able to compare with other countries, we consider it to be 2020 in the global analyses.

4- The increase had been 6.6% the previous year.



89% of Italian households have bought an organic product at least once during this year (compared to 88% the previous year and 53% in 2012). In 2020/2021, 54% of Italian families consumed organic food at least once a week.

During the year 2020/2021, large retail represented 48% of the Italian organic market, organic shops 22%, out-of-home catering 15% and other channels 15%.

For a long time, organic distribution dominated the Italian organic market¹. Then, the growth of organic sales was faster in supermarkets than in this channel between 2010/2011 and 2018/2019. Over the next two years, sales from organic shops increased again more than those from supermarkets.

In 2020/2021, organic sales in supermarkets increased by 2%² compared to the previous year. Hypermarkets and supermarkets accounted for most organic sales in large retail (63%). In 2020/2021, organic sales of hypermarkets and supermarkets remained almost stable (+0.4%), while those of hard discount increased by 10.7%³. The online organic sales of mass retail increased significantly in 2020/2021: +67% (they had even increased by 143% in 2019/2020). In general, there is a strong enthusiasm among Italians to buy food products online. Even though there was a real boom during the spring lockdown, organic online sales continued to grow strongly in the months that followed.

The space dedicated to organic products in mass distribution has been growing for several years. Currently, all the large retail chains sell organic products. The vast majority of chains continued to develop their organic supply in 2019 and 2020. There were nearly 4,700 organic references in total in Italian large retail in 2019 (+8% compared to 2018). In 1999, *Esselunga* was the first generalist chain to sell organic products under private label. In 2019, there were 26 private labels (compared to 9 in 2001). In 2019, stores have, on average, 180 organic products (compared to 166 in 2018 and 92 in 2001). The main supermarket chains for organic sales are *Coop*, *Iper* and *Carrefour*. *Coop* is the chain with the most organic products under private label: 750 in 2019. *Carrefour* has introduced an organic department of 115m² with more than 1,500 products in its Carugate hypermarket in Milan.

After a fall the previous year, sales of organic shops rose again with an increase of 8% in 2019/2020. In 2020/2021, they also increased by 8%.

There were 1,339 organic shops in 2019⁴, a decrease of 1% compared to 2018. There was nevertheless a slowdown in closures compared to 2018. Lombardy was the region with the most organic shops in 2019 (225). Organic distribution is very fragmented: 23% of shops are totally independent. 42% of shops were part of organic chains. There are several organic chains, but only one nationwide: *NaturaSì*, that was created in 1992. It had about 300 organic supermarkets in 2021 and has more than 4,000 organic products. *NaturaSì* is a processor, a wholesaler and a retailer. *NaturaSì* recently bought *Biobottega* and *Piacere Terra*. A few *Cuore Bio* stores have gone under the *NaturaSì* chain. In 2019, 35% of shops were part of one of the two service networks: *Ki Ama Bio* and *Come Voglio Bio*. They offer their members exclusive products and services, a magazine, promotional campaigns, POS advertising, a central platform, training... 357 shops were affiliated with *Ki Ama Bio* in 2019 and 373 with *Come Voglio Bio*. Italian organic shops are smaller than French ones. In 2019, 29% of shops occupied less than 70m². In 2019, some small shops closed, while the number of stores over 150 m² increased. French chain *Bio C'Bon* closed its Italian shops in 2020.

In Italy, the share of fresh and bulk products is lower than in France.

1- It represented 45% of the Italian organic market in 2009 and mass distribution 29%.

2- Growth well below those of the previous 4 years.

3- Growth like that of the previous year.

4- 1 163 in 2010.



Most chains have created their private label.

Organic shops are trying to innovate, expand their ranges, modernize themselves and communicate more to fight competition from large retailers. However, organic distribution remains unbeatable when it comes to the scope of its supply. In 2019, 12% of organic shops had a catering area.

In 2020/2021, organic sales also developed in other channels (convenience shops, pharmacies, service stations, markets, etc.) with an overall increase of 5%. There were 405 websites with organic products in 2019 compared to 286 in 2015. For 7% of websites, this was their only organic activity (no physical shop, no production or processing). 39% of online stores with organic products did not have a range of conventional products. The share of organic online was estimated at 7% in 2019/2020. Biobank expects further growth in online sales of organic products over the next few years.

In 2019, 2,857 organic farms practiced direct sales. There were 236 markets with organic products and 797 organic buying groups. 1,466 organic farms practiced agritourism.

The organic turnover in out-of-home catering increased by 10% in 2020/2021. Its dynamic has been positively impacted by the gradual reopening of restaurants and public canteens, the return to mobility and the gradual reduction in teleworking. The consumption habits of Italians are changing as they adopt more sustainable lifestyles and are more aware of the link between diet and health.

In Italy, health is the main reason to buy organic food. Local origin of the products does matter for Italians. The health crisis has reinforced their interest in local products.

Italians have the highest per capita expenditure on food in EU. Quality is very important too.

The main categories of organic products purchased by Italians in 2020/2021 were fruits, dairy products, vegetables and cereal-based products. Eggs remained the best-selling organic product, ahead of jams and fruit-based spreads and vegetable drinks.

Organic consumption is more developed in the North of the country but it seems to be growing in the South as well.

■ **The United Kingdom:** rise of the organic market for several years

Overall, the British organic market has more than tripled in twenty years and increased by 55% in ten years, reaching € 2.91 billion in 2020 (+12.6% compared to 2019). However, the organic market share was still below 2%.

According to the *Soil Association*, the pandemic was the catalyst for rapid growth in the organic market in 2020.

In 2019, more than 85% of UK adults bought organic products, up from 80% in 2014.

In 2020, organic sales increased in most channels. Home delivery was the channel with the biggest growth: +36.2% in 2020, ahead of mass distribution: +12.5%¹. Sales by independent distributors almost stagnated (+0.9%). The out-of-home catering sector is the only one to have decreased (-23.2%). This is due to the pandemic which caused the closure of commercial restaurants.

In 2020, large-scale distribution remained the main channel for organic with a 64.8% market share in the organic food and non-food. The main retail chains for organic distribution are *Sainsbury's*, *Tesco* and *Waitrose*. The two hard discount chains, *Aldi* and *Lidl*, have expanded their organic range in recent years. The interest of discounters in organic products has

¹ - These growth rates relate to both food and non-food products, while +12.6% is for the food market only.



prompted classic mass retailers to consider the presence of organic products in their food range as mandatory.

Home delivery includes both online purchases¹ and subscriptions to box schemes. It represented 17.7% of the organic market in 2020². According to the *Soil Association*, its share could soon reach 25%. The organic range available online is growing. *Ocado*, the leading online organic distributor, had a range of more than 4,500 organic items late 2019. A partnership between *Ocado* and *Marks & Spencer* started in the fall of 2019. It should contribute to the growth of organic sales online. Many Millennials prefer to buy their organic products online because they rely on product reviews posted on shopping sites to make their purchasing decisions. In 2019, the UK was the world's third largest online organic buyer. The two main home delivery companies for organic baskets are *Riverford* and *Abel & Cole*. The latter has launched an organic meal delivery service to the office. Reducing packaging could help boost sales in the future. It has become a priority for British organic consumers.

The independent distributors channel includes organic shops, health food shops, delicatessens, craftsmen, convenience stores³ and direct sales (farm shops and farmers' markets). It represented 14.6% of the organic market in 2020. There are between 800 and 1,000 independent shops and small chains with organic products. New independent distributors of organic products have emerged in recent years.

The organic chain *Planet Organic* has acquired its competitor, *As Nature Intended*, becoming the largest organic retailer in the United Kingdom with 15 shops. It plans to open ten more shops in Greater London over the next few years.

According to the *Soil Association*, reducing the distances to buy food and buying directly from the producer are key factors for the organic consumer.

Independent distributors bring specialized knowledge, innovative products and approaches. Organic distribution sells exclusive organic brands that are not available in supermarkets. A number of organic products are first marketed in organic shops before going to mass distribution.

Out-of-home catering represented only 2.7% of the British organic market in 2020 (4% in 2019).

In 2020, dairy products and fruits & vegetables remained the main categories of organic products purchased in the UK, accounting for almost half of the organic market.

Health has become the main reason to buy organic. *Kantar Worldpanel* recently reported that 1/3 of food is chosen for health reasons. Organic food is seen as a healthier alternative. In general, more and more Britons are looking at product labels to decide which products to buy. Since the horse meat food crisis in 2013, the origin of products has been an important choice criterion for consumers. Organic products are considered reliable.

The environment is the second reason to buy organic food. Packaging⁴ and broader environmental issues also continue to influence consumer choices. The British are increasingly aware of the urgency of the climate challenge, the importance of preserving biodiversity and the damage caused by pesticides. To limit food waste, they shop more often than before and in less quantity. In urban areas, this phenomenon is amplified by the difficulty of storing food in small flats. 82% of organic shops try to have zero waste. According to the *Soil Association*, unpackaged products are becoming the norm in independent stores.

1- It is the European country with the highest share of online food purchases: almost 7% in 2019.

2- Excluding online sales by mass distribution.

3- Convenience stores that are part of a chain are still part of the "independent distributors" category.

4- According to IPSOS MORI, over 80% of Britons say they are very or somewhat concerned about packaging when shopping.



As in Germany and Sweden, vegetarianism and veganism are growing in the UK. According to *Kantar Worldpanel*, the number of vegan meals eaten in the UK increased by 23% between 2015 and 2019.

According to a study by *Kantar Worldpanel* published late 2018, 72% of consumers believe that organic products are too expensive. However, according to the Soil Association, young Britons, especially Generation Y, are increasingly buying organic because they want to know the origin of their food and are ready to pay more for products that respect the environment and animal welfare. According to the *Soil Association*, 44% of young Britons aged between 18 and 29 years old try to buy organic whenever they can (compared to 27% of Britons in 2019).

The demand for organic products is higher in London and in the South of England than in the rest of the UK. *Scottish Organic* brand products and agritourism support the growth of the Scottish organic market. The organic market is less developed in Northern Ireland than in the rest of the UK (Organic represented 1% of the food market in 2018.).

■ **Sweden:** stagnation of the organic market in 2019 and decline in 2020

The organic market was multiplied by 3.4 between 2010 and 2020. After a strong development in 2014 and 2015¹, the growth of the Swedish organic market slowed down in 2016 due to lack of supply. In 2018 and 2019, the Swedish organic market almost stagnated. In 2020, it fell by 1.8% to € 2.76 billion. The slowdown observed since 2017 is mainly due to a growing interest in local and vegetarian/vegan products², to the detriment of organic products. The stores put more emphasis on vegetarian and vegan products than organic food. Besides, supermarkets communicated much less about organic products in 2020.

The organic market share fell to 8.7% in 2020 (compared to 9.0% in 2019 and 9.3% in 2018). This is explained by the weak growth in organic sales in a context of increasing food prices by 3.5%.

In 2020, large retail (without online sales) represented 49% of the organic market, ahead of *Systembolaget* monopoly (20%), out-of-home sector (17%), and online sales (6%).

In mass distribution, organic sales continued to decline in 2020. Private labels represent a significant share of organic sales in supermarkets (nearly $\frac{3}{4}$ in 2018). In 2020, *ICA* remained the main seller of organic products in Sweden with an organic range of more than 3,200 products, including a bit more than 1,000 under private label. *Coop* is the distribution chain with the highest organic share (8.7% in 2020); however, it reduced a little its organic range in 2019. The *Axfood* chain has expanded its organic range under private label in 2020. *Lidl's*³ organic sales continued to grow in 2020 (+5.9% compared to 2019). In 2020, its organic range included around 150 products, 90% of which were under private label. The launch of new organic products on the Swedish market was most probably small in 2021.



1- Almost doubling of the organic market in 2 years.

2- The share of vegetarians and vegans in the Swedish population has increased significantly, which has had a negative impact on the market for organic products of animal origin.

3- Lidl continues to open new stores in Sweden.



Systembolaget organic sales increased by 4% in 2020, which is more than the other channels but much lower than the increase rate of a few years ago (+32% in 2016) because it reached its 2020 target of 10% of volume sales in 2015. In 2020, organic products represented 15.0% by value of *Systembolaget*'s sales. Wines are the main category of organic products sold by the monopoly.

Sales of organic products in catering fell by 16% in 2020 due to the pandemic.

On the other hand, the latter has accelerated the growth of online organic sales¹. They increased by 29% in 2020. In 2020, the market share by value of organic products online was double that in supermarkets. In 2020, it was very high at the two main online distributors: *MatHem*: 24% and *Mat.se*: 16.4% (the latter belongs to *Axfood*). In 2020, *MatHem* has more than 2,500 organic products and its competitor nearly 1,100. The share of the Swedish population shopping for food online was already rising sharply before the pandemic. The younger generations are especially accustomed to online shopping. Households with children are more numerous than others to make their food purchases online, because of the significant saving of time. According to *Ekoweb*, the increase in online food purchases is also boosting organic food purchases. In fact, consumers who buy food products buy about twice as many organic products online as those who shop in stores. According to *Ekoweb*, customers who buy food online are largely the same customers as those who buy organic products.

Sales in organic shops represented only 1% of the Swedish organic market in 2020. The organic chain *Paradiset*, which had a few outlets in Stockholm, as well as an online store, has gone bankrupt.

Health² is increasingly seen as one of the main reasons to consume organic. According to a survey carried out in January 2016 by *Ekoweb*³, 87% of Swedes believed that pesticides in conventional foods represented a health risk. The population has been marked by the food scandals of recent years, as well as by several studies⁴. There is also a growing concern for the preservation of the environment and animal welfare. As in other countries, Swedes wish to reduce food packaging.

Price is the main reason for not buying organic products.

Promotion campaigns for organic products declined in Swedish supermarkets in 2021. This must have had a negative impact on the development of the Swedish organic market.

■ **Spain:** a relatively recent development of the domestic market

Organic market development really started in 2015. The Spanish organic market has multiplied by 2.6 between 2009 and 2019. The organic market grew by 8.4% in 2019 to reach € 2.363 billion. The organic market share was estimated at 2.24% in 2019.

In 2019, nearly 70% of Spaniards said they consume organic products at least once a month. The share was even 80% for 16–24-year-old living in Madrid.

In 2019, large-scale distribution was the leading marketing channel for organic products with a share of 48%⁵, ahead of organic distribution (36%).

Organic market growth is strongly linked to the development of organic supply in mass distribution. Most chains already have thousands of organic products in their range, already

1- *Ekoweb* estimates that this has enabled online organic sales to gain 2 to 3 years.

2- In 2018, many Swedes associated organic food with better health, but they also saw a connection between health and Swedish and local foods.

3- From a sample of over 1,000 Swedes representative of the Swedish population.

4- In particular by a film which showed the reduction of pesticide residues in the urine of a family thanks to an organic diet and by a study establishing that the flesh of conventional bananas contains pesticide residues.

5- Supermarkets became the first marketing channel for organic products in 2018.



covering almost all the needs of the average consumer. *Aldi* and *Lidl* regularly introduce new ones. Late 2020, *Aldi* had a range of 200 organic products under its *GutBio* private label. The main chains are increasingly offering organic products under private label. According to *Kantar Worldpanel*, private label products occupy an increasing place in organic purchases in Spain. However, a significant share of these products comes from abroad.

Besides, organic corners have proliferated in recent years, increasing the organic products visibility (e.g., *Biosfera* at *El Corte Inglés*). *Carrefour* has started to open *Carrefour Bio* shops in Spain, starting with Madrid, and has developed its supermarkets organic range. On a very local scale, 2 chains, *Spar* and *HD Covalco*, have opened hybrid stores with a wide organic range, supplemented by their usual offer.

On the other hand, the Spanish supermarkets leader, *Mercadona*, has not yet decided to bet on organic products.

According to *Kantar Worldpanel*, *Lidl* became the leading distributor of organic products in Spain, ahead of *Carrefour* and *Aldi*.

Currently, there are between 3,000 and 4,000 organic shops in Spain. Spanish organic distribution is undergoing restructuring. In recent years, it is rather medium to large shops that have been created. The shops are mainly in large cities and tourist areas. The main organic chains are *Veritas* and *Herbolario Navarro*. *Veritas* had 77 outlets early 2021. The largest, which opened late 2018, has a sales area of 900 m². The *Veritas* range exceeded 6,000 organic references in 2020. This organic chain saw its turnover increase by 8% in 2020. *Herbolario Navarro* had around thirty shops early 2021. The French chain *Bio C' Bon* closed its Spanish shops in 2020.

Organic chains are under development. As in other countries, there is a concentration of organic distribution: *Veritas* and *Ecorganic* have joined forces and *Herbolario Navarro* has bought the *Biospace* shop.

In 2019, catering represented around 2% of the Spanish organic market. The introduction of organic products in this channel is growing.

In 2019, other channels (direct sales, consumer cooperatives and online shops) represented 14% of the organic market. Sales of organic products are growing through direct sales (organic markets exist throughout Spain) and online. *Carrefour* recently acquired *PlanetaHuerto*, which is one of the leading online organic distributors in Spain and Portugal. The pandemic appears to have had a strong impact on online sales. Thus, those of *Veritas* tripled between 2019 and 2020.

The first wholesale market for fresh organic products was inaugurated in November 2020 in Barcelona. Fruits & vegetables are the main products sold there. The goal is to reach 50% of Barcelona's needs for organic fruit and vegetables by 2031.

According to *Kantar World Panel*, 72% of Spanish households consumed organic products in 2020.

According to *Kantar Worldpanel*, Catalonia is the region with the most organic consumers. The demand for organic products is also especially high in Madrid¹, Valencia and the Basque Country.

Barcelona was the sustainable food capital of the world in 2021.



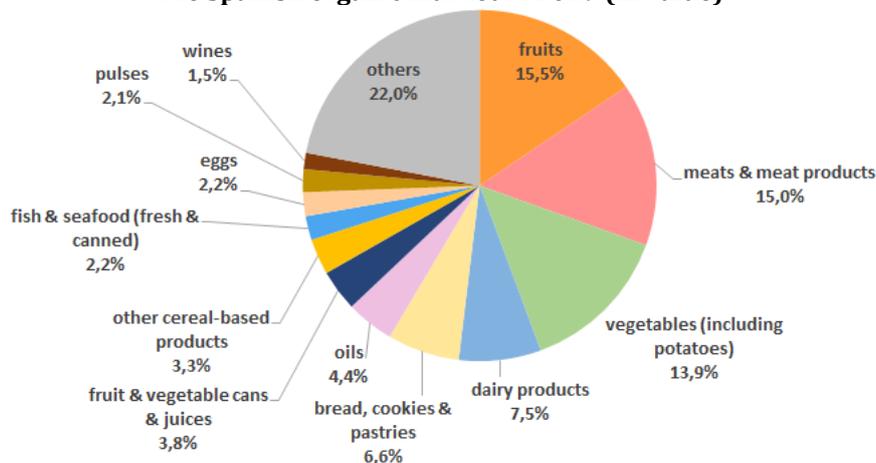
1- In 2018, the Community of Madrid represented around 15% of the Spanish organic market.



Generation Y is the main organic consumers category. According to a study by the *Ministry of Agriculture*, around 30% of organic consumers are under 35 years old. The industry has understood this. More and more organic products intended for young people are launched on the Spanish market. According to experts, young people increase their purchases of organic products when they have children. Many women between 40 and 50 consume organic products. Plant-based products represented 55.5% of the organic market in 2019. Fresh fruit was the main category of organic products consumed in 2019.



The Spanish organic market in 2019 (in value)



Source: Ministry of Agriculture of Spain

The demand for processed organic products has increased in recent years, which has resulted in a growth of imports of these products. Imports even grew faster than exports during this period.

Health and environment protection are the main reasons to purchase organic products for Spanish consumers.

They have increased their knowledge of organic production. As in other countries, the number of vegetarians/vegans is increasing.

The organic market could continue to grow strongly over the next few years, especially thanks to the development of organic consumption by young people.

■ **Denmark:** Its inhabitants are the biggest EU organic consumers

The organic market started to develop early. In 2013, it had already exceeded € 1 billion. It exceeded € 2.3 billion in 2019, an increase of 9.9% compared to 2018 and 73.8% compared to 2015.

In 2019, organic products represented 12.1% of food purchases in large retail and online¹. In 2020, the organic share reached 13%.

Preserving health is the first reason to buy organic, ahead of environmental protection and animal welfare.

¹ - Statistics Denmark revised its calculation method in 2019.



In 2020, more than $\frac{3}{4}$ of Danes bought organic products every week (compared to 52.5% in 2019 and 48.7% in 2016). The advanced development of the Danish organic market can be explained by the awareness campaigns that have been organized (the Danish organic logo is known by 98% of the inhabitants¹) and by the cooperation between the supermarket chains and the organic federation, *Organic Denmark*. The latter works with mass retail at the strategic level and supports the brands in the development of their organic departments to give more visibility to organic products. Trainings and seminars are organized to help small businesses to work with mass retail and catering.



According to market analysts, the organic market has entered a virtuous cycle of accelerating growth: consumers expand their organic purchases to other categories of products, which is causing a widening range to meet demand.

According to a survey by the *Ecological Lands Association*, 74% of Danish consumers said they will buy more organic products in the next few years.

A few years ago, a study by the Danish Food Administration showed that more than half of conventional fruits & vegetables contained pesticide residues². Following this study, seven Danish researchers recommended that pregnant women and young children should not consume conventional fruits & vegetables. This had a strong impact on the development of the organic fruit and vegetable market in Denmark: they became the main category of organic products sold in 2018.

According to *Organic Denmark*, Danes are increasingly trusting organic products benefits and are aware that they can influence food production through their purchasing habits.

The most popular organic products are oat flakes (52% are sold organically³), carrots, yogurts and eggs.



Large-scale distribution is the first marketing channel for organic (80% in 2018). *Coop* introduced organic on its shelves in 1981. Large-scale distribution (with online sales) represented 81% of the organic market in 2019. Organic sales in this channel increased by 9.4% in 2019 compared to 2018. An organic alternative is offered for most products sold in this channel. Most of the baby food sold is organic. Some stores only offer organic products for some product categories. According to *Coop*, organic products have

become a standard for many Danes who choose everyday consumer goods. At *IRMA*, organic represents 28% of sales. This chain has opened a totally organic store in Copenhagen. *Netto* is one of the leading distributors of organic products in Denmark. Its organic private label has more than 200 references. Hard discount share in organic sales is growing. In 2018, *Aldi* doubled its organic products number to reach 200. It wishes to continue to develop its offer. Organic sales in supermarkets increased by 14% in 2020. The low prices of organic products boosted sales.

Organic purchases online are growing. City families with children are those who buy the most food online (especially baskets) and they consume more organic than the average. The two main online organic shops are *Aarstiderne.com* and *Nemlig.com*.

1- Late 2019, the Danish organic logo celebrated its 30th birthday.

2- It was conducted on 2,515 samples. 246 organic samples were also studied. Eight of them also contained pesticides, making 3% of organic products analyzed.

3- One of the reasons the organic share of oats is so high is an alarming communication made a few years ago about the high levels of pesticide residues in conventional oats.



Organic shops hardly exist in Denmark. Market and farm sales represent only a small portion of total organic sales.

The use of organic products in catering is booming: organic sales increased by 10.6% in this sector in 2019, reaching € 349 million. The organic share in catering stood at 11.6% in 2019. Public canteens and commercial restaurants were closed for much of 2020.

Fruits & vegetables and dairy products were the two main categories of organic products sold in 2019.

11% of Danes are heavy consumers of organic products. They represented 44% of organic sales in supermarkets in 2018. The organic consumption is more developed in the regions of Copenhagen and Aarhus.

According to *Ekoweb*, the pandemic has had a positive effect on organic sales in supermarkets and online.

■ **Austria:** a mature market

Organic is a fundamental trend in Austria, anchored for many years. The Austrian organic market has more than doubled in ten years, reaching € 2.37 billion in 2020 (+15.4% compared to 2019)¹.

According to AMA, 97% of Austrians bought organic products at least once in 2020. Due to the pandemic, many Austrians have become more careful about their diet.



Large-scale distribution is the main sales channel for organic products, it represented 81% of the organic market in 2020 (including more than a third in hard discount). Organic products are very present in supermarkets, especially under private labels. The organic market share in this channel was 10.0% in 2020 (compared to 9.3% in 2019). During the first half of 2021, organic sales in

Austrian supermarkets increased by almost 17% compared to the first half of 2020. The organic market share in this channel reached 11.4% during this period.

Direct sales and organic shops represented 14% of the organic market in 2020.

Milk and eggs remained the most popular organic products in Austria in 2020.

The main reasons to buy organic products are health and regional origin.

■ **The Netherlands:** development of organic sales in supermarkets

The Dutch organic market grew 6.5% in 2018, reaching € 1.608 billion. It has almost tripled in ten years. The organic market share in supermarkets and organic shops reached 4.7% in 2018. According to the *GfK panel*, 95.6% of Dutch households bought organic products in 2020.

In 2018, large-scale distribution (excluding hard discount) represented 51% of the Dutch organic market, ahead of catering with 21%, organic distribution with 20% and direct sales with only 3%.

In 2018, the sector that grew the most was out-of-home catering (+15.0%), ahead of mass distribution (+8.2%). Sales in organic shops fell by 0.9%².

¹- It had increased by 6.5% between 2018 and 2019.

²- -3.5 % in 2017



In 2019, organic sales increased by 4.9% in supermarkets and by 1.8% in organic distribution¹. The increase was 3.0% for out-of-home catering in 2019.

Large retailers offer between 50 and 1,000 organic references. Their organic supply under private label is growing. The latter represent a significant share of organic sales in mass distribution.

Even though organic hard discount sales still only represent less than 1% of the Dutch organic market, their growth has accelerated in recent years. The *Aldi* and *Lidl* ranges comprised nearly 60 organic products each in 2018. They continue to grow.

In recent years, organic shops have been more subject to competition from large-scale distribution and the resulting pressure on prices. However, they still have many loyal customers. It is in this channel that many new organic products are tested before they are also sold in supermarkets. Shops that opened an online store in addition to their physical point of sale continued to see sales growth. Organic shops sell more groceries while supermarkets sell more fresh produce. The decline in sales by organic distribution is also partly due to the drop in the number of organic shops. The closures concern small shops whose owners are retiring and cannot find a buyer. Late 2020, there were 315 organic shops in the Netherlands. Organic shops generally have between 5,000 and 9,000 references.

A number of online shops specialized in organic and organic lunch boxes have emerged in the past 10 years. Besides, organic products are also included in online shops for wine/meal boxes. Online sales represented around 1.2% of the organic market in 2017.

Around 500 Dutch organic farmers practiced direct selling in 2018: 375 had a farm store, 50 sold only on markets and 75 had a business of seasonal sale.

Organic sales by craftsmen and delicatessens are growing.

Fresh fruits & vegetables (including potatoes) are the main category of organic products purchased.

The main reasons to buy organic are environmental protection and animal welfare. Price is the main brake to the development of organic consumption.

According to *USDA*, growing health awareness among Dutch consumers and demand for products with environmentally friendly methods is expected to fuel organic market growth.

■ **Belgium:** an organic market more developed in Wallonia and Brussels than in Flanders

The Belgian organic market has multiplied by 2.6 in ten years, reaching € 890.7 million in 2020 (non-food included), i.e., +13.5% compared to 2019². The organic market share remained at 3.4% in 2020 due to the sharp increase in total food consumption (4.94% in Wallonia³).

In 2020, 96% of Belgians bought an organic product at least once.

Organic consumption is significantly higher in Wallonia than in Flanders. In 2019, Wallonia and Brussels represented 61% of the organic market and Flanders 39%. In Wallonia there are more organic farmers, organic areas and organic shops than in Flanders.

Brussels is home to more single people, affluent families and two-income households with a growing interest in organic products.

Mass distribution remained the main channel in 2020 with a market share of 60%, including 38% for supermarkets and hypermarkets, 8% for hard discount and 14% for convenience shops. The organic range in hard discount still remains modest (20 to 60 products⁴).

1- The evolution of direct sales is not known for 2019.

2- While Belgians spent 12% more on food.

3- After tripling between 2009 and 2019, it went from 4.89 to 4.94 between 2019 and 2020.

4- Some even have 1,800.



Large retailers offer many organic products under private labels.

According to a survey by *Sirius Insight*, in Belgium, six out of ten consumers of organic products do their shopping exclusively in supermarkets. Only 8% make their purchases only from organic distribution and 5% only from producers.

In 2020, organic distribution represented 34% of the Belgian organic market. Unlike the situation in many neighboring countries, their share is growing every year, to the detriment of direct sales and that by craftsmen. In 2020, Belgium had 690 organic shops, including nearly 300 in Wallonia and more than 80 in Brussels¹. The shops are, on average, smaller than in France. They are mostly independent or members of small chains. However, there is a restructuring of the sector in favor of chains. The main organic chain, *Bioplanet*², has around 30 shops. It belongs to a large retail chain: *Colruyt*. The *Färm* chain currently has 14 shops. The *Sequoia* chain has taken over the points of sale of *Bio C'Bon*. It now has 15 shops.



Only a quarter of the organic products of organic distribution come from Belgium, this seems mainly due to a lack of structuring of the Belgian organic sector.

In 2020, direct sales represented 5% of the Belgian organic market with 4% for sale on the farm and 1% on the markets. There does not appear to be any online store development by organic producers. Online sales seem to be developing more slowly than in France.

Vegetables (including potatoes) and fruits represented 43% of the Belgian organic market in 2020.

Health and quality are the main reasons to buy organic products. Price remains the main brake to the development of consumption. In 2020, singles remained the category that allocated the largest share of its food budget to organic products.

According to the 2020 Barometer on organic farming and organic products in Belgium from the *Walloon Agency for the Promotion of Quality Agriculture*, 70% of organic consumers declared that they intended to eat more organic food at home in the future.

1- In June 2021, Wallonia had 295 organic shops and Brussels 87.

2- In 2017, *Bioplanet*'s turnover represented half of that of organic distribution.



The organic market in the other EU countries

■ Finland: an evolving organic market

It is the 11th EU organic market. It has multiplied by 5 in 10 years, reaching € 409 million in 2020, i.e., +9.7% compared to 2019¹. Organic market share reached 2.6% in 2019.

Mass retail is by far the main channel for organic sales. During the 2010s, the three large supermarket chains² broadened their organic ranges, especially under private label. Late 2018, *S-Group* had a range of 4,100 organic products and *K-Group* 2,100.



Organic shops and direct sales represent a small share of the organic market. There are no organic supermarkets and there are only a few independent organic shops in the main towns. However, organic products are also sold in shops dedicated to well-being which are not completely organic. The two most important chains are *Ruohonjuuri* and *It's Pure*. They each have between 15 and 20 shops in the city centre, in the largest cities, and an online store. However, these shops cannot be considered as food shops because their range of basic groceries is very limited. Most of the organic products sold there are imported. Health food stores, such as the *Life chain*, also sell organic products. They can also be found in a few markets. The most committed consumers buy organic products directly from producers through a system called *REKO*. This concept originated in Finland and then spread to Sweden and Norway.

Organic online sales have not taken off. According to *Kantar TNS*, only 4% of organic consumers bought them online in 2019. There is still moderate growth in this channel.

According to *Pro Luomu*³, 3/4 Finns are interested in organic products. Just over a third of Finns now buy organic products at least once a week and less than a third at least once a month. In 2020, only 5% of Finns did not buy organic products at all. About a fifth of Finns have been more interested in organic food since the pandemic.

Families with children remain the main buying demographic group for organic purchases. According to *Pro Luomu*, young people (especially men under 30) are more interested in organic products than previous generations, because they are more concerned with protecting the environment and respecting animal welfare. Organic consumption is more developed in large cities, but it has also grown in small towns with a university in recent years.

Fruits & vegetables and dairy products are the most popular organic products.

The main reasons to buy organic products are the "purity" (i.e., less chemicals and additives), flavour, respect for the environment, animal health and welfare. Price is the main brake. According to 2019 *Kantar TNS* survey, the Finns would buy more organic products if there were cheaper, if they were sure that the producer received a fair price and if they were more convinced of their difference with conventional products. Lack of availability is the second brake. According to local supermarkets, the organic market could grow much faster if there were more supply. Consumers would indeed like to be able to buy a wider range of organic meat, bread and other cereal-based products. Recently, some organic categories such as hot drinks, baby food, as well as sweet juices/soups have grown considerably with the new products.

1- This increase is almost identical to that between 2018 and 2019

2- S-group, K-group and Lidl

3-Survey carried out early September among 1,185 Finns aged 18 or more.



According to *Pro Luomu*, in recent surveys, more than half of Finns planned to increase their organic purchases in the future.

According to *Rambøll Management Consulting/Nordic Council of Ministers*, the Finnish organic market could exceed € 1.1 billion by 2025 and 1.5 by 2030.

■ **Poland:** the most developed organic market in Eastern Europe

The Polish organic market has more than multiplied by six in ten years, but remains relatively modest: it was valued at € 314 million in 2019 (+25.6% compared to 2018). The organic market share is estimated at less than 1%.



With the rising standard of living in Poland, increased people are starting to take an interest in organic products. 44% of them recognize the EU organic logo. Health and food safety appear to be the main reasons to buy organic products. Price is the main brake to the development of consumption.

In 2018, around 30% of Poles bought organic products, but only 4% did so on a regular basis.

Poles would like to buy organic products that are produced in their country. However, a very large share of the organic products sold in Poland come from other EU countries, especially from Italy, Germany and France.

Supermarkets have become the main distribution channel for organic products. A few years ago, their organic range was quite modest. It has grown, especially with the introduction of organic products under private label. This had a positive impact on the development of the market. Currently, more than 7,000 stores have an organic range. Private labels can represent up to 60% of a store organic range.

Organic distribution is well developed. There are currently around 900 organic shops. Most are in large urban areas but are also starting to appear in cities of less than 100,000 inhabitants. In 2020, the organic chain *Organic Farma Zdrowia* opened an online shop in addition to its 40 shops: *Organic24.pl*. It is currently the main online player for organic food products. A small supermarket chain has been created: *Bio Family*.

There has been a boom in online organic sales in 2020 due to the pandemic.

Two *Carrefour Bio* shops were opened in Poland.

Organic products are also sold in the markets¹. A few weekly organic markets have sprung up in large cities.

Recently, some organic items are available in grocery stores, convenience shops and gas stations.

■ **The Czech Republic**²: a still modest organic market share

After a significant increase in the years 2005-2008, the organic market rather stagnated until 2012, then grew faster. Overall, it almost tripled between 2011 and 2019 to reach € 207 million (+18.7% compared to 2018). Organic market share reached 1.5% in 2019.

In 2019, large retail³ remained the main distribution channel for organic products with a market share of 35%, ahead of organic and health food shops (16%), online sales (15%),

1- Farm sales are seldom practiced in Poland for tax reasons.

2- It is considered the most industrialized and the most developed of the Central and Eastern Europe countries.

3- The main distributors are all foreign companies. Nearly 2,000 supermarkets and hypermarkets.



drugstores (15%), direct sales (6%) and out-of-home catering (6%). The organic range in mass distribution, as well as the dedicated sales area, have continued to grow in recent years. Currently, all the supermarket chains offer organic products. Several of them have organic products under private labels.

Most organic shops do not only sell organic products, but also natural and farm products and delicatessen. In 2016, there were 600 organic/natural product shops. There are a few organic shops chains. The oldest, *Country Life*¹, was established in 1991 and had ten shops (including eight in Prague). This chain and another chain, *Bioobchod*, also operate as organic wholesalers to sell to mass retailers. Some shops have a small restaurant.

Direct sales are developing. Their organic sales increased by 32% between 2018 and 2019. Farmers' markets are booming, especially in large cities. Many organic producers have opened an online store.

The pandemic boosted online food sales in 2020.

Fruits & vegetables remained the main category of organic products sold in 2019, representing 17.2% in value of the organic market, ahead of dairy products (15.5%).

The typical organic consumer is rather female, aged 20-59 and living in large cities.

Prague is the main consumption area for organic products, ahead of South Moravia/Zlinský.

The main brake to the development of organic consumption is the price. Organic products are considered a luxury by some consumers because of the price difference with conventional products. Organic products sold in the Czech Republic can be 30-80% more expensive than their conventional equivalents, or even 100%. Besides, the Czech consumer knows little about organic products and his confidence is limited. The fact that organic shops sell both organic and non-organic products makes the situation more difficult.

Besides, 57% of organic retail sales were generated by imported products in 2019.

■ **Ireland:** faster development of the organic market than organic production

The Irish organic market reached € 206.4 million in 2017, it has almost tripled in ten years. According to *Bord Bia*, it grew by 16.2% between 2019 and 2020. Supermarkets remained the main distribution channel for organic products in Ireland in 2020.

Supermarkets offer a good range of organic fresh products (eggs, dairy products, meat, fruit and vegetables), but the supply of organic packaged products is much smaller except for baby foods. The arrival of German discounters *Lidl* and *Aldi* had a positive influence on organic products availability in large retail. Most chains have created organic private labels.

The other distribution channels for organic products are direct sales (farmers' market² and farm gate sales), delicatessens and online stores. In recent years, there has been an increase in organic sales by independent shops, health food stores and online. There are relatively few organic shops, probably less than 15, but their number is growing.

There is no organic shops chain, neither organic supermarket. A few organic shops also have an online store. Many delicatessens sell large quantities of organic products. Some health food shops have it in their ranges (including fruits & vegetables). Large online retailers including *Amazon* have a wide range of organic products. Organic producers practicing direct



1- It was the first distributor of organic products in the Czech Republic.

2- There is a large network of farmers markets in Ireland.



sales have seen a huge increase in their online sales with the pandemic, with demand threatening to outstrip supply. Outlets for direct sales have developed in response to the pandemic.

The most popular organic products are carrots, bananas, milk, yogurt, eggs, beef and porridge. Vegetables and fruit are the best-selling organic product category in Ireland, ahead of dairy products. In 2020, fruits & vegetables were the category of organic products that has grown the most (+38%), ahead of meat (+33%), grocery products (+22%), poultry (+20%) and dairy products (+8%).

According to *Bord Bia*, more than ¼ of Irish bought organic food at least once a week in 2020. In 2017, Irish organic consumers were ⅔ female. 41% of them were 25-44 years old. 42% were households with children. 26% live in Dublin. Another population buying a lot of organic products is made up of retired people with no children at home, with a comfortable income and health problems. People from Generation Y are buying increasingly organic products.

The main reasons to buy organic are health benefits, the environment (including the fight against climate change) and the taste.

The main brake for consumers are the price and the limited organic ranges. According to *Organic Trust*, Irish organic production is not sufficiently developed, with the exception of the cattle and sheep sectors. There are few large organic fruits & vegetables producers, as many farmers produce only what they can sell directly at farmers markets, which prevents them from growing. There is a risk of having to rely more on imports to meet the organic market if production does not grow faster. The organic sector appears to be unstructured: lack of cooperation between organic producers and no real producer group. According to *Organic Trust*, the absence of state support through public procurement means that many sectors do not have the critical mass to make supplies reliable and affordable.

■ **Luxembourg:** rapid growth of the organic market

The Luxembourg organic market¹ was estimated at € 160 million in 2019. It has more than tripled in ten years. The organic market share has been estimated at around 8%.

In Luxembourg, there are both organic shops chains and independent shops. In all, there are around thirty organic shops. *BIOG*, the cooperative of organic farmers in Luxembourg was born in 1988 and created its first shop the following year. It resulted from a chain of organic shops, *Naturata*, which currently has eleven shops (including two on the farm) and represents around 30% of the Luxembourg organic market. This chain have more than 8,000 organic references. The French chain *La Vie Claire* is established in Luxembourg. There are also 3 *Naturalia* shops in Luxembourg City. Among the organic shops, *OUNI*² stands out with its concept of organic groceries without packaging and in a cooperative form. It had two shops in 2021, one in the capital and the other in Dudelange.



The major large retail chains³ offer organic products, especially under private label. The Belgian chain *Delhaize* is present with 42 supermarkets in 2021 and an organic range of more than 800 products. This chain began to introduce organic products in its stores in the nineties. In 2021,

1- The average salary in Luxembourg is the highest in the European Union.

2- "without" in Luxembourgish

3- The retail landscape is very various, with distributors from Luxembourg, Belgium, France and Germany.



Cactus had 57 supermarkets and a range of 3,100 organic products. It started selling organic products in 1974. In 2018, it replaced its range of imported organic beef with organic Luxembourgish meat.

There are a few delivery systems for organic baskets, such as *Chat Biotté* and *Co-Labor*¹, and lunch baskets. Farm sales are also practiced. Many organic producers also sell their products on markets, mainly in the capital. Some Luxembourg restaurants offer organic products, such as the wine bar in Gründ, which is completely organic.

The most popular organic products are baby food, honey, eggs, flour and cereals.

■ **Romania:** an organic market largely dependent on imports

The Romanian organic market was valued at € 137 million in 2019 and the organic market share at 1.2%. The market is growing thanks to a context of economic growth, a development of the organic supply and better consumer awareness.

Besides, measures adopted in June 2015 to reduce the value-added tax on food products from 24% to 9%, as well as other tax policies related to wages and pensions, lowered the costs of food products and have had a positive impact on the demand for consumer products perceived to be healthier.

Interest in health and improved purchasing power led to significant growth in the organic market in 2019. During the pandemic, interest in organic products declined somewhat. The health crisis has heightened the interest of Romanians in local products.

Mass distribution represented more than two-thirds of the Romanian organic market in 2018. Most chains have an organic range. Nonetheless, organic products still represented less than 1% of retail food sales in 2018. Organic products are presented in dedicated shelves.

A small share of the products sold in the markets are organic. Organic shops are not very common. There are, however, several small chains of organic shops (*Naturalia*², *Paradisul Verde*, *RealFoods* and *BioCorner*). Online organic sales are growing. A few restaurants in Bucharest and other big cities offer organic products.

Romania imports around 80% of the organic food it consumes, mainly from Western Europe.

Dairy products are the main organic products sold in Romania, ahead of baby food.

Consumers in large cities are increasingly interested in organic products.

Price sensitivity remains an important factor.

According to experts, sales of organ dairy products, fruits and vegetables should continue to grow well in the coming years.

■ **Lithuania:** organic consumers who are mainly urban dwellers

The Lithuanian organic market was estimated at € 115 million in 2019. The organic share was still under 1%.

The group of consumers interested in organic products is growing but remains at a relatively low level and is concentrated in the cities³. In 2020, 14% of Lithuanians bought organic products at least once a week and 34% once or several times a month.

Several large retail chains have introduced organic products into their offer, like *RIMI*, which sell them under private labels.

Organic products are also sold at farmers' markets.

1- The first goal of *Co-Labor* is professional reintegration.

2- No link with the French chain.

3- 68% of Lithuanians live in cities.



The most popular organic products are fruits & vegetables, dairy products, baked goods, cereals and baby food.

The main brake is the lack of understanding of what is organic. Organic products are often confused with local products. A survey carried out for *Ekoagro* in 2020 showed that only one in two Lithuanians know that organic products are GMO-free and less than one in two know that they are grown without synthetic chemicals. 11% of Lithuanians never buy organic products. The main reason for them is the higher price of organic products.

Health is the main reason to buy organic products.

■ **Latvia:** a growing organic supply

The Latvian organic market was valued at € 105 million for 2019. Organic products represented 1.5% of the food retail trade in 2019.

Although the market remains relatively small, the supply and availability of organic products in the various channels seem good. Mass distribution have an organic range since about 15 years. Their organic range and organic visibility have increased in this channel in recent years. Two mass distribution chains, *Maxima* and *Rimi*, have started to expand their organic ranges, especially under private label¹. They have organic products in all food categories. *Rimi* is the main seller of organic products in Latvia. Its range included more than 850 organic products in 2018 (+28% compared to 2017). However, these two chains are mainly present in cities, while the one that dominates distribution in the countryside does not have an organic range.

There are also a number of independent organic shops.

Some of the organic products are sold directly by producers.

The use of organic products in collective catering is much less developed than in Scandinavia.

The number of consumers interested in organic products is growing, but still relatively small. They are mainly people from big cities (the urban middle class is growing.).

Online food sales are still quite modest. Only 7% of the population ordered food online in 2017. As in other countries, it is often the same consumers who buy organic products and make part of their purchases online. They are also interested in buying local products and by direct sales. Families with children are probably the most important group of organic food consumers in Latvia, according to *Ekoweb*. Young consumers are increasingly looking for healthy products.

Health is the main driver to purchase organic products. Latvians consider organic food to be of high quality, but there is a confusion among some consumers between organic and local. Latvians are increasingly interested in local products.

Price appears to be the main brake to organic consumption development.

■ **Croatia:** consumers increasingly interested in organic products

The Croatian organic market was valued at € 99 million in 2018 (-1% compared to 2017). It has more than doubled since 2009. Experts say it increased by 7% between 2019 and 2020.

In 2020, organic products were sold in supermarkets, drugstores, organic shops, direct sales and online. There are two organic chains. The largest, *Bio & Bio*, has 16 shops and an online store. The second, *Garden*, has more than 10 shops. There are also small independent organic shops in almost every town.

Croats are increasingly interested in organic products.

¹ *RIMI* belongs to *ICA* and therefore benefits from access to expertise and a wide range of organic products, notably under private labels.



The organic range in supermarkets has been growing for several years and all supermarkets now have their organic section. However, imported products still dominate the organic market. As in other countries, young people of Generation Y are more interested in organic products than their elders (mainly by processed products).

Health and food safety appear to be the main reasons to buy organic products.

The main brakes to organic consumption development seem to be the price and the lack of knowledge about organic products.

Fruits & vegetables are the main category of organic products bought

■ **Greece:** an organic market that is starting to grow again

The Greek organic market was estimated at € 66 million in 2017. After a growth of 8% between 2007 and 2011, the organic market fell. Between 2011 and 2016, it lost 4%. It stagnated in 2017. According to experts, the prolonged economic crisis is the main reason for this decline as it had an impact on consumer purchases. Austerity measures, the continued reduction in disposable income, the rise in prices in all public services and the heavy taxation have indeed destabilized consumption behaviour. This crisis caused the bankruptcy of organic processors and organic shops. Under these circumstances, all potential investment projects have been postponed or cancelled.

The organic market then started to grow again and was estimated at between 90 and 100 million € for 2020.

Supermarkets represented 68% of the Greek organic market in 2016, ahead of organic distribution (27%). There are several organic chains. *Biologiko Xorio* has 16 shops. There are also a number of markets offering organic products. Online sales are not very developed in Greece¹. There are very few organic products in restaurants and canteens.

The main reasons to buy organic products in Greece remain naturality and health.

There still seems to be a lack of confidence in organic products among Greek consumers.

■ **Estonia:** organic consumption mainly in urban areas

The organic market was estimated at € 62 million for 2019.

According to a study carried out in 2020 by *EKI*, 1,931 different national organic products were available on the domestic market (1,779 in 2019). The increase in supply is however hampered by the low level of development in the processing of organic products.

Another 2020 *EKI* study showed that 13% of consumers buy organic food at least once a week. The organic consumption is much higher in urban areas than in rural areas. A study by *Turu-uuringute Ltd* showed that in the capital, the share of consumers who buy organic food at least once a week is 21%.

There is a wide organic range in mass distribution. These products are often imported. Organic products are generally not presented in dedicated corners but mixed with conventional products. The organic range under private labels is growing. In 30 *Rimi* stores, there is an area dedicated to local and organic products.

The organic hard discount range should expand in the coming years.

There are around forty independent organic shops. Half of them is in Tallinn and Harju County. There are about ten online shops with organic products. In 2017, around a fifth of the population made food purchases on the Internet. This can be seen as an advantage for the development of the organic products market.

¹ - *Sklavenitis*, the main supermarket chain, only have around 100 organic products on its website.



Estonians are increasingly interested in organic products.

Health and food safety are the main reasons to buy organic products. The price is often mentioned as a brake on organic consumption, especially in rural areas where the income of the population is generally lower than that in large cities. General knowledge of organic farming is still relatively weak. Many consumers associate local products with healthy and safe food.

■ **Portugal:** a strong increase in demand

Sales of packaged organic products and drinks were valued at € 60.5 million in 2017. There is no overall estimate of the Portuguese organic market.

In recent years, there has been a sharp increase in local demand for organic products, which has led to the development of organic distribution, organic markets and organic supply in mass distribution.

Large retail is increasingly developing its organic range, especially under private label. The most active chains are *Continente* and *Pingo Doce*, which began to offer organic products in 2002. *Aldi Portugal* increased its number of organic references by 48% in 2019 compared to 2018. *Continente* developed its organic range under private label in 2020. According to *Business France*, mass distribution represented almost $\frac{2}{3}$ of the Portuguese organic market in 2016. Organic products are presented in dedicated departments. Increasing space is dedicated to organic fruits & vegetables. Large supermarket chains invest a lot in advertising their organic products.

The first Portuguese organic shop, *Biocoop*, opened in Lisbon in 1993. Since 2009, it has moved to a 1,000 m² site. In 2013, there were more than sixty small organic shops in Portugal. Since then, larger shops have appeared, with, sometimes, a bakery or butcher department, a restaurant service or even a room for conferences and workshops. These shops are mainly in major cities. Lisbon has a large number of organic shops. Born in 2008, *Brio* is currently the most important organic supermarket chain: six stores in and around Lisbon, and 2 others in Estoril and Aveiro. The organic chain *Go Natural*, which belongs to a mass distribution group (*Sonae*), has five stores in the capital and 2 nearby. There are a number of independent organic supermarkets, especially in the Lisbon. One of them, *Maria Granel*, only offers bulk. A chain of 29 health food stores, *Celeiro Dieta*, also sells organic products.

There are several restaurants offering organic products in Lisbon.

There are eleven organic markets, mostly in the Lisbon region. The first was created in 2004. Online sales and subscriptions to organic baskets are also growing.

The typical organic consumer would be a woman over the age of 45.

The main organic products consumed in Portugal are vegetables and fruits.

■ **Slovenia:** a still modest organic market

The Slovenian organic market was estimated at € 49 million in 2013.

In 2012, mass distribution represented 70% of organic market, organic shops 15% and direct sales 15%.

■ **Bulgaria:** an increasingly diversified organic supply

The organic market growth has accelerated since 2015. Since 2017, the context of economic growth has had a positive effect on the organic market development.



The Bulgarian organic market has more than multiplied by seven in ten years, reaching € 30 million in 2018 (+7% compared to 2017). *Bioselena* believes that the organic market is probably much more developed than that.

According to estimates, the organic market must have grown by 8% in 2019 and 10% in 2020¹. In 2020, Bulgarians sought to eat healthier.

The organic range appears to be increasingly diversified.

Supermarkets are the main distribution channel for organic products in Bulgaria (61% of the market in 2017). In recent years, all the chains have developed their organic range, especially under private label². Most chains have developed organic departments in their stores. *Metro* has even set up small organic shops near the checkouts.



Organic shops have existed in Bulgaria since 2006. In 2020, there were around 200 organic shops in this country. There seem to be quite a few organic chains.

Online sales have grown in importance in selling organic products. Rapid delivery services for organic products have developed fast.

Public canteens do not have organic products in their meal, only a few private kindergartens do. There are no fully organic restaurants, but some establishments offer a few

organic products on their menus.

Baby products, drinks, snack products and dairy products are the main categories of organic products sold in Bulgaria.

Bulgarian consumers increasingly regard organic products as healthier than others and perceive their benefits in terms of environmental protection.

■ **Hungary:** urban organic consumers

The Hungarian organic market was valued at € 30 million in 2015. Organic products still represent less than 1% of the Hungarian food market.

Large-scale distribution is the leading channel for organic products. Currently, all of the supermarkets chains have an organic range, most often under private labels. Mass distribution mainly sells organic products with a long shelf life. Its organic range has developed well, especially in fruits & vegetables, eggs and dairy products. A quarter of supermarkets customers buy organic products at least once a week.

Online organic sales³ are growing.

The range in organic shops is not always exclusively organic.

There are several organic markets. The best known, *Ökopiác*, is in the capital. There are also some organic baskets subscriptions.

Fruits & vegetables are the most popular organic products.

It is mainly consumers with high incomes who buy organic products. Even if the average Hungarian salary is low (€ 735), purchasing power is increasing strongly (+61% between 2014 and 2019). Most consumers of organic products live in Budapest or its surroundings.

The main brakes to organic consumption are the price, the lack of knowledge about organic products and the small but growing supply of organic products in supermarkets.

Besides, organic products from abroad dominate in mass distribution and organic shops.

1- But sales decreased on farmers markets.

2- Especially in German chains

3- Food is the first category of products purchased online.



■ **Cyprus:** a slowly developing organic market

The Cypriot organic market amounted to around € 10 million in 2019, which is still modest. Even though organic products are gaining in popularity, the pace of development of the organic market is still slow. Around 6% of consumers regularly shop organically. Young consumers are more interested in organic products than their elders.

There are not many organic shops yet. Most of them are independent. With six shops across Cyprus, *Etherio Bio Stores* is the island's first fully organic chain. Fresh organic products are mainly sold in organic shops. Organic processed products can be found in organic shops, supermarkets and convenience shops. With the pandemic, some organic shops have started offering online orders. Direct sales are mainly done on the farm. There is no restaurant offering organic products.

The Cypriot organic market is highly dependent on imports (80% of organic products are imported).

The main brake to the development of the Cypriot market is the high price of organic products. This mainly concerns fresh organic products. Due to the limited local supply¹, the price differential between organic and conventional food is much higher in Cyprus than in the rest of Europe.

Health is the number one reason to buy organic products.

■ **Slovakia:** urban organic consumers

The organic market is still small. It was estimated at € 4 million in 2010 (only 0.2% of the Slovak food market). Slovaks are indeed more interested in dietetic products than in organic products. In 2008, mass distribution and organic shops each represented 40% of the organic market. Large retail started selling organic products from 2003.

Most chains currently have a small range of the most common organic products, often under private label.

In 2010, there were already around one hundred organic shops. They do not only sell organic products and are mainly in Bratislava and in the western part of the country (the richest). Consumers of organic products are mainly residents of large cities such as Bratislava, Košice, Žilina, Trenčín, Banská Bystrica and Zvolen. In 2010, almost 70% of organic sales were in the capital region. Most organic shops chains also have an online store. The German drugstore chain *DM* also sells organic products.

Price remains the main brake to organic market development.

■ **Malta:** organic products available in different channels

There is a local demand for organic products, but the amount of the organic market is not known. Organic products are sold in supermarkets, organic shops, direct sales and online. Fruits & vegetables are the main organic products purchased by Maltese consumers.

1- The main organic foods produced in Cyprus are cereals, olives, grapes, fruits & vegetables.



Focus on organic products in out-of-home catering

- Out-of-home catering includes commercial catering institutions (hotels, restaurants, cafes and transport) and collective catering (schools, nurseries, hospitals, prisons, retirement homes, companies, etc.).

- With the growth of organic consumption in general, the organic share in out-of-home catering progresses.

- In **Austria**, the introduction of organic in school meals began in the mid-1990s.

In 2018, the organic market share in out-of-home catering was around 3% in value (1.8% in 2016). It was however much higher for some products such as milk (14.3%), butter (9.9%) and eggs (8.7%)¹.

The Austrian government program foresees a 23% share of organic products in public catering by 2023 and 55% by 2030, as well as 100% regional and seasonal sourcing. This action plan concerns federal institutions. Nevertheless, harmonization will be made with the Länder.

At the level of the Länder, requirements have also been set for organic share in collective catering. Vienne is the driver for organic development in collective catering. It started to integrate organic products in public catering in 1998. The organic share amounts to 50% in value in school catering² and nurseries. The goal is to reach 70% by 2024. Regarding public catering for adults, the organic share is 30% in value. In Vienna, an organic game is given in kindergartens to educate the little ones about organic farming.

Lower Austria, Upper Austria and Carinthia impose a 30% organic share in value in school catering and nurseries. In hospitals in Upper Austria, 30% of the fresh products served must be organic. In spring 2021, the government of Salzburg decided to set a target of 30% of organic products in public canteens by 2025. In Burgenland, the organic share is above 25%. There is a goal to reach 100% by 2024. Styria has an organic share of 25% and Tyrol 33%. The Voralberg is aiming to hit 25%.

In 2021, 30 restaurants in Salzburg used organic products, half of them were completely organic.

Agritourism is quite developed on Austrian organic farms.

14 Austrian hotels are members of the *Bio Hotels* association³.



- In **Belgium**, organic products have been introduced in all kinds of collective catering, but their use is more developed in nurseries, schools, youth hostels and businesses than elsewhere. However, there are some well-advanced projects in rest homes, hospitals, administrations and universities.

From 2007 to 2013, organic certification in out-of-home catering was done on a voluntary basis with the private *Biogarantie* specifications. Since June 2013, any collective or commercial catering company in the Brussels Capital and Wallonia regions wishing to communicate in writing with the term organic must comply with these specifications rules and be certified organic and *Biogarantie*. The classification criteria are currently being revised but, so far, they provide for four levels of certification: organic restaurant: 100% organic products except for game and fish, organic dish: same criterion as previously applied to dish ingredients, organic

1- Data 2016 for these three products.

2- Except for full-time schools (with extra-curricular): 40% by volume

3- 80 members in six countries: Austria, Germany, Greece, Italy, Slovenia and Switzerland.



ingredient: a 100% organic ingredient and share of organic ingredients: minimum 15% and 1% increase each year.

There is no direct financial subsidy to cities or distribution channels, but funding is occasionally granted for projects to supervise, support or train staff.

Support for Walloon canteens has been launched to provide more local supplies. *Manger Demain* coordinates it. *Biowallonie* is providing technical support and canteens training. Support lasts 2 years to allow the canteens to meet their signed commitments. More than 220 canteens already signed the Green Deal *Sustainable Canteens*.

According to *Biowallonie*, 56% of Walloon canteens say they use organic products and 65% of Brussels canteens.

Late 2020, 16 Brussels nurseries had become fully organic.

- In **Bulgaria**, public canteens do not offer organic products, only a few private kindergartens do. There are no completely organic commercial restaurants, but some offer a few organic products on their menus.

- In **Croatia**, some pilot projects have taken place to introduce organic products in school canteens.

A new certification, *Eko Gastro*, has been implemented for commercial catering. A first restaurant was certified 100% organic in Zagreb (*Zrno bio bistro*). It is part of the oldest organic farm in Croatia.

- In **Czech Republic**, the use of organic products in commercial catering is growing rapidly, even if this market is still small. It is mainly the restaurants in Prague that use organic products. The organic products use in canteens is still rare. Some canteens, however, use organic products regularly, such as the one of the *Ministry of Agriculture*. According to this Ministry, the opportunities for an increased use of organic food in schools were examined in detail in 2018. However, it turned out that there were still significant brakes on the side of the management of canteens¹ and of the supply chain. There is no public policy aimed at introducing organic products in collective catering yet. However, discussions are underway to prepare possible legislation. It should essentially guarantee a compulsory organic share in school canteens. This could be done through public market tenders in which a share of regional food should be requested. An organic share could be indicated.

Globally, sales of organic products in out-of-home catering increased by 44% between 2018 and 2019.

- In **Denmark**, public kitchens have developed the use of organic products following the first organic farming development plan in 1995. In 1997, to support this development, the *Danish Parliament* set up a fund to support projects for the introduction of organic in collective catering.

In 2000, the *Dogme 2000* project was launched by three towns: Albertslund, Ballerup and Copenhagen (later joined by nine others). One of their goals was to supply 75% of organic products (by volume) for public catering. Copenhagen even went further with a target of 90% of organic products by 2015² (reached in 2016). This was done without increasing the kitchen budget, but with training staff.

1- There are over 8,000 school canteens in the Czech Republic.

2- For about 60,000 meals a day.



The Danish government provides financial support to train kitchen workers, whether in the public or private sector. To help kitchens introduce organic products into their menus, a website has also been set up¹. With the Danish Organic Action Plan 2012, the organic conversion of public kitchens was supported with around € 12 million during the years 2012-2015. In 2021, another funding of € 7 million has been decided for the period 2021-2024.

In 2019, the organic share in public catering was 23% on average and 11.6% for the whole of out-of-home catering in volume. Around 800,000 meals are served every day in Danish public institutions and canteens.

Sales of organic products to catering grew by 11% in 2019. With double-digit annual growth rates, they increased considerably from 2010 to 2019, from around € 67 million. to more than € 335 million in 2019.

The logo *Det Økologiske Spisemærke*² was created in 2009 by the Danish Veterinary and Food



Administration and therefore celebrated its 10th anniversary in 2019. It is administered and controlled by the State to distinguish canteens and restaurants according to the share of organic raw materials: gold (90 to 100%), silver (60 to 90%) and bronze (30 to 60%). The share can be calculated either by value or weight, for a period of 3 months. An annual inspection takes place each year. In 2021, 22% of logo users were "gold", 42% "silver" and 36%

"bronze". 71% of Danish consumers know this logo.

In 2021, more than 3,400 canteens, hospitals, day-cares, cafes, restaurants and hotels used this logo, including Michelin star restaurants.

Many big Danish hospitals have focused on organic products and have been awarded the organic kitchen label in gold or silver, and more than 30 of the 98 Danish municipalities have embarked on the conversion of their kitchens in day-cares, schools and retirement homes.

Besides, music festivals use this logo, such as the *Roskilde Festival* and the *Northside Festival*. Since 2017, 90% of the food served at the *Roskilde Festival* is organic and 100% at the *Northside Festival*.

The introduction of organic products in public kitchens has been followed by a similar development in hotels, restaurants and cafes. The *Danish Veterinary and Food Administration* has developed the *Organic Restaurants App* to further support this development. The app is downloadable in three different languages and highlights Danish hotels, restaurants and cafes certified with the *Økologiske Spisemærke* label. A 2017 study by the Danish Agriculture and Food Council showed that farmers who supply Danish restaurants with a Michelin star are largely organic producers.

The organic conversion of public kitchens has shown several positive side effects such as healthier, more climate-friendly menus with less meat and more green vegetables. This is in accordance with official dietary guidelines. At the same time, food waste is normally greatly reduced and the emphasis on seasonal and locally sourced agricultural products is often part of the organic conversion process in public kitchens.

The restaurant industry has, unsurprisingly, been negatively affected by the COVID-19 situation (especially the private sector), and this is expected to have a clear negative effect on the 2020 numbers and probably on 2021 figures for the entire organic catering market. However, the number of professional kitchens certified with the organic label continued to grow during the

1- www.oekologisk-spisemaerke.dk/horeca-fr

2- Organic kitchen



pandemic, so that the demand for organic products in the catering market is expected to normalize.

■ In **Estonia**, 35 establishments were certified organic late 2019. Half of them were schools and nurseries.

The local government of Võru County has set a target of 20% of the raw food materials used in schools and kindergartens to be organic by 2024.

■ In **Finland**, the organic products introduction in collective catering started in 1999 thanks to the creation of *Ekocentria* to promote the regular use of organic or local products in this sector. The *Steps to Organic Program* started in 2002 to help kitchens to increase their use of organic products. This project is growing: in 2021, 2,400 kitchens in the public and private sectors participated in this program (200 in 2007). In 2020, 23% of professional kitchens used organic products daily. The most widely used organic products are those made from cereals, dairy products and fruits. Only 10% of kitchens did not use organic products at all in 2020.



The new Finnish goal for the use of organic products in catering is 25% by 2030.

In the private sector too, kitchens are determined to increase the use of organic products and they believe that customer demand for organic products will increase significantly in the future. In 2019, the organic share in public catering was 12% in volume on average (compared to 10% in 2016).

The main reasons for introducing organic products in professional kitchens are environmental, taste and ethical reasons.

In autumn 2017, the Finnish *Ministry of Agriculture and Forestry* decided to make an additional grant to cities to purchase organic milk, fruits & vegetables for schools and nurseries, as part of an EU program¹. According to the *Finnish Food Authority*, this decision has increased the use of organic milk in schools and kindergartens to some extent, e.g., during the 2019-2020 school year, around 2.5 million litres of organic milk were drunk in nurseries.

■ In **France**, in 2018, a target of using 20% organic products (or from farms in conversion) in public school canteens by 2022 was set under the *EGAlim Law*². Besides, the *Fourth National Health Nutrition Program*, published on September 20, 2019, displays the goal that the entire French population consume at least 20% organic plant products per week.

According to the 2020 edition of the *Agence BIO/Spirit Insight Barometer* on the introduction of organic in collective catering, 80% of pupils' parents wish organic products to be used in school catering, 72% of French in hospitals, retirement homes and workplaces.

In 2019, the use of organic products in collective catering increased by 21% in value compared to 2018. According to *Agence BIO/AND-I*, organic products represented 5.6% of food purchases for collective catering in 2019.



1- EU 2016/791

2- Over six million pupils eat lunch in the canteen every day.



According to *CSA Research/Agence BIO*, in 2019, 65% of collective catering institutions¹ declared offering organic products to their guests (61% in 2018). The share was 86% in school catering (79% in 2018), 58% in work catering, 38% in the hospital and retirement homes and 78% in the public sector (71% in 2018). In 2019, 36% of canteens reported using in-conversion products. 72% of canteens declared using French organic products (50% a regional offer). 81% of canteens offering organic products estimated that their introduction generated an additional cost estimated, on average, at 20% both in terms of purchasing materials and overall². 65% tried to limit it. Among canteens introducing organic products, this choice is made by management for 60%. In more than two-fifths of school, organic introduction is driven by pupils' parents

In 2019, fresh products remained the organic products introduced by the largest number of canteens: 90% of canteens introducing organic products offered organic fruit, 82% organic vegetables, and 76% organic dairy products. The number of canteens offering organic meat has increased.

In 2020, 22% of canteens plan to introduce organic when they were not in 2019, and this is certain for 8% of them.

Agence BIO coordinates actions to increase organic share in public catering. Four towns already offer 100% organic meals in public school canteens: Langouët, Correns, Grande Synthe and Mouans-Sartoux. In Briançon, organic represented almost 67% of food purchases in the central kitchen in 2018. In Bayonne school canteens, the share of organic products rose to 68% in 2020. In 2017, Paris was the first organic public buyer in France. Exemplary work is being carried out in Parisian nurseries, which reached an organic share of 62%.

Fontenay-sous-Bois has reached 45% of organic in its canteens, with the implementation of zero plastic and recovery of all waste. Dijon went from 10% to 36% organic in its canteens in a few years, without additional cost for families nor the community, thanks to a sharp reduction in waste, a strong political support and municipal services that work hand in hand. In Gers, organic share in junior high schools has reached 26% (½ is local).

In 2019, the *Pierre-Fanlac College* in Belvès in Dordogne was the first to be labelled 100% organic.

In 2020, collective catering was severely affected by the pandemic. Organic purchases in this sector fell by 25% in 2020 compared to 2019.

Early 2018, 78% of French people wished to find organic products in restaurants, 66% in fast food restaurants and 55% in vending machines according to *Agence BIO/Spirit Insight*.

In 2020, organic purchases by commercial restaurants fell by 14% compared to 2019, due to the pandemic.

In 2019, the organic market share in commercial catering was still only 1.7% in value. In 2019, 43% of commercial restaurants had introduced organic products in their menus (compared to 37% in 2016). In commercial catering, establishments offer a growing organic range. For 34% of them, it was entirely organic dishes, for 24% an entirely organic offer (except for a few products not available in organic) and for 15% organic menus or organic formulas. Besides, 80% of the organic products purchased were of French origin³. However, brakes persisted: the additional costs generated by the introduction of organic products (for 43% of establishments) and the difficulties in identifying suppliers appeared at the top of the professionals' concerns.

1- That is more than 40,000 establishments

2- The higher price of organic products can be explained by a higher organic production cost and the concern for fair remuneration for all the operators.

3- 59% came from the region.



45% of buyers believed their purchases would increase for the full year of 2019, while 51% believed they were going to remain stable.

Since January 1st, 2020, the specifications that allow the promotion to consumers of the use of organic products in commercial catering in France since 2012 has been modified. It now also makes it possible to certify a restaurant according to the share of organic products purchased (in value). There are three certification levels: category one covers restaurants of which 50 to 75% of supplies are organic, category two for 75 to 95%, and category three for at least 95%. These restaurants must be controlled by certifying bodies and be notified to *Agence BIO*.

■ In **Germany**, the use of organic products in universities catering began in 1993 at *Oldenburg University*. In 2015, 31% in value of the purchases of this canteen were organic. Currently, most of the 58 university canteens in this sector use organic products and more than half of them are certified organic. Some offer daily totally or partially organic meals and others organize *Organic Week* actions.

In some Länder or cities, it is compulsory to request a minimum organic share in calls for tenders.

Organic products in public catering in some German cities

Towns and Länder		Organic target	Organic share in 2020
Augsburg	School canteens	Over 30%	4%
	Kindergarten/nurseries	Over 30%	30%
	City receptions and events		100%
Berlin	School canteens	30% for the school year 2020/2021 and 50% for 2021/2022	
	Kindergarten/nurseries	15%	60%
	Public establishments	15%	
	University catering		13%
Bonn	School canteens	20%	Between 10 and 13%
	Kindergarten/nurseries	20%	Between 10 and 13%
	Retirement homes	30%	20%
Bremen	School canteens	100%	25%
	Kindergarten/nurseries	100%	Vegetal products: 40% and milk: 100%
	Hospitals	20%	
Darmstadt	School canteens	50%	
	University catering		20%
Dresden	School canteens		80%
	Kindergarten/nurseries		80%
Erlangen	School canteens	25%	
	Kindergarten/nurseries	25%	
	Administrative restaurant of the town hall	Dairy products and some fruits and vegetables in organic	
Frankfurt-on-Main	School canteens	30%	
Freiburg	School canteens	100%	
	Kindergarten/nurseries	100%	



Friburg in Breisgau	School canteens	20%	20%
	Kindergarten/nurseries	20%	20%
Gießen	School canteens		100%
	Kindergarten/nurseries		100%
Hamburg	School canteens	10%	Some organic lunches in several school canteens
	Kindergarten/nurseries	10%	
Heidelberg	School canteens	50%	10%
	Kindergarten/nurseries	50%	30%
Karlsruhe	School canteens	25%	At least 25%
	Kindergarten/nurseries	25%	At least 25%
	Administrative restaurant of the town hall	25%	25%
	Kindergarten/nurseries		
Landshut	School canteens	50%	
Lauf an der Pegnitz	School canteens		20%
	Kindergarten/nurseries		20%
Leipzig	Public collective catering	10%	
	Kindergarten/nurseries	10%	10%
München	School canteens	100%	At least 10%
	Kindergarten/nurseries	50% (90% for meat)	kindergarten: 50% and nurseries: over 50%
	Receptions organized by the city		At least 20%
	Canteens of the Bavarian Ministry of Agriculture		20%
Neuwied	School for the blind and partially sighted persons		50%
Nuremberg	School canteens	75%	20%
	Kindergarten/nurseries	100%	Over 75%
	Other public institutions	50%	50%
	Canteen of the University of Applied Sciences		90%
Oldenburg	University catering		Over 25%
Regensburg	Public collective catering	50% of organic or regional products by 2025	
Reutlingen	Kindergarten/nurseries		2 nurseries: 45%
Stuttgart	Kindergarten/nurseries	50%	44%
Witzenhausen	Public collective catering	About 20%	
Wuppertal	North Rhine-Westphalia University of Finance		65%
Land Bade-Württemberg	Public collective catering	25%	

Source: Agence BIO and Corina Edringer d'A'Verdis/different German sources

It is rarer to find a high organic share in German hospital catering. The *Saintes Maries Children Hospital* in Landshut (Bavaria) was the first children's clinic to offer fully organic menus to its



patients. In Baden-Württemberg, six clinics have introduced organic products. The rest home in Bad Pyrmont (Lower Saxony) uses around 80% of organic products.

The Bio Städte Network is an association of German towns that aims to promote organic farming and increase the use of organic in schools and other public establishments. These towns share their experiences and set up joint projects. Early 2021, this network included twenty-one towns: Augsburg, Berlin, Bonn, Bremen, Cologne, Darmstadt, Erfurt, Erlangen, Freiburg, Hamburg, Heidelberg, Ingoldstadt, Karlsruhe, Landshut, Lauf an der Pegnitz, Leipzig, Much, München, Nuremberg, Regensburg and Witzenhausen. Recently, with the help of *A'Verdis*, they published a practical guide to help municipalities introduce more organic food in catering.

The *Organic Mentors Network* was created in 2004 to promote organic products in collective catering.

A national initiative was set up in 2006 to develop their use in nurseries and schools: *Bio kann jeder*¹, with the aim of convincing canteen managers, educators, teachers and parents of the importance of using organic in canteens. A national network of nutritionists is mobilized and meetings and workshops² are organized to inform staff and parents.

Early 2018, a promotion campaign was launched to encourage the use of organic milk in canteens and restaurants.

Early 2020, the Federal Minister of Food and Agriculture presented her *BioBitte*³ initiative which aims to develop the use of organic products in public kitchens to increase it to at least 20% by 2030. Previously, there was only a national recommendation to use a minimum of 10% organic products in school canteens. The ministry provides specific information documents. Regional and national events are organized to share experiences and ideas.

Late August 2021, the Federal Minister of Food and Agriculture announced that the organic share in federal canteens should rise to 20% by 2025.

In Baden-Württemberg, a new pilot project *Organic food in collective catering in organic model regions* (hospitals, schools, kindergartens, companies and retirement homes), which started in 2021, aims at a share of at least 30%, ideally 60%.

Some corporate restaurants have reached high organic rates in their menus (e.g., *Esprit, Hipp*). German youth hostels are increasingly serving organic products.

There is a culinary association of the best organic chefs. It has twenty-five members.

■ In **Ireland**, the use of organic products is very little developed in out-of-home catering. There is only one fully organic and certified restaurant: *The Strawberry Tree*. There is almost no state support for introducing organic products into school canteens and hospitals.

■ In **Italy**, organic products introduction in school meals began in 1986. In 1999, a national law encouraged many cities to buy organic products.

Italian law provides that school canteens use at least 50% of organic products. In reality, not all canteens meet this criterion. Some go beyond it.

The *Ministry of Agriculture* has set up a fund to develop the use of organic products in school canteens⁴. Its goals are to reduce costs for families and to set up information and promotion actions in schools.

1- *Organic Everybody can do it.*

2- *Since 2020, online events have been organized.*

3- *Organic Please*

4- *€ 5 million in 2020*



Organic products in Italian school canteens



- share unknown
- less than 10%
- between 10 and 29%
- between 30 and 49%
- between 50 and 79%
- between 80 and 99%
- 100% organic
- share very high for some products

*NB: The share was very high for some products in Sesto Fiorentino, in the suburbs of Florence.
Source: Agence BIO/Many Italian sources*



In 2019, 1,405 school canteens served meals with organic ingredients (72 in 1996). The regions with the most organic canteens are in the North (Lombardy, Veneto and Emilia-Romagna). In 2019, the canteens of 268 towns used between 70% and 89% organic ingredients and those of 113 towns used more than 90%.

Organic products have also been introduced in hospitals, but on a smaller scale. They are used more in schools than in the rest of the collective catering.

The organic products use is growing in commercial catering. 543 organic restaurants¹ were counted in 2019 (406 in 2014 and 71 in 1996). 116 of them were in Emilia-Romagna and 100 in Lombardy. In 2019, half of organic restaurants used more than 90% organic ingredients. There are two private brands: *100% Bio Gourmet* when there are only organic ingredients and *Menù Bio Gourmet* for menus or organic specialties (with at least 70% organic ingredients)². Agriturism is highly developed in Italy. In 2019, 1,466 organic farms practiced it.

- In **Latvia**, there is an organic certification for restaurants. It is controlled by the State. It is possible to have dishes, menus or the establishment certified (three levels³).

The presence of organic products in restaurants is still quite limited, but the use of the state control and labelling system favours its dissemination.

- **Lithuania** has been regulating organic catering since May 2009. Lithuania has introduced national specifications and a voluntary control system. In May 2021, it launched new legislation revisiting the labelling and control rules for organic collective catering. Certification remains voluntary because it makes it possible to attract companies who are really motivated and willing to become certified organic without discouraging all other operators in the sector from including organic in their menus.

- In the **Netherlands**, the introduction of organic products in out-of-home catering started to really develop in 2014. This sector is late for organic compared to the rest of the Dutch market. Even if the use of organic products in out-of-home increased by around 15% in value in 2018 for the third consecutive year, the organic market share in this channel was still only 1.7%. The organic range available from wholesalers supplying this sector is still relatively limited. Around fifty hotels were certified organic in 2018. The most used organic products in out-of-home catering are bread, dairy products, eggs, meat, tea, drinks and dry groceries.

- In **Portugal**, there are two private specifications for the use of organic products in collective catering, both approved by the *Ministry of Agriculture*. Seven canteens are concerned (in Lisbon, Oeiras and Matosinhos). The *2017 Organic National Strategy* provides for the introduction of organic products in canteens. A pilot project *Organic canteens* was implemented in a small number of schools during the 2018/2019 school year. The results evaluation should make it possible to establish a national specification for the use of organic in canteens. It will not only concern schools, but also other public catering services (health, universities, administrations, etc.).

- In **Spain**, there are initiatives to introduce organic products in collective catering in several regions. Out-of-home sector represents around 3% of the Spanish organic market.

1- These are establishments using at least 70% of organic products

2- A website www.gourmetbio.it has been created.

3- 20-50%, 50-80% ou 80-100%



Andalusia is a pioneer region. The introduction of organic products in collective catering started there in 2006 with the *Eco Food* program whose goal was to develop organic consumption in schools, hospitals and prisons. The Second Andalusian Plan for Organic Agriculture (2007-2013) set a target of 60% of organic for part of the public schools for 2010 with concrete measures. A 3-years program (2012-2015), "Organic food for social consumption in Andalusia", has helped promote the organic consumption in schools, hospitals and other public services through the distribution of organic recipes and information material, promotion of organic gardens in schools, provision of technical assistance, specific training for catering staff and coordination of producers and catering companies. In 2010, 2 large Andalusian hospitals¹ already offered organic products, as well as a retirement home.

In the Canaries, the *Food Act in Schools* has encouraged the organic products use in school meals. Initiatives have also been taken in Catalonia with various public and private supports. Barcelona, which has signed the *Milan Pact* in 2015, has increased the organic share in school menus by rewarding suppliers according to the quantity and diversity of organic products offered. Besides, the 68 kindergartens of the town started to introduce organic products in September 2019.

In Castile-la-Mancha, the *Organic sector development plan for 2019-2023* provides for the introduction of organic products in public school canteens.

The organic products introduction in commercial catering still seems relatively underdeveloped.

The *Garden Hotels* chain offers a few organic products on its menu.

- Early 2019, the *Ministry of Agriculture of Slovenia* decided to promote organic farming by lobbying for more organic and local products in public institutions such as schools, kindergartens and hospitals. An interministerial working group should work on this subject.

- **Sweden** is the country with the highest organic share in public purchases. The public goal, set in 2017, is to introduce 60% of organic products in value in all municipalities by 2030 (nursery and schools, hospitals and other public institutions). In 2020, the national average was 38% (compared to 39% in 2019) and 114 municipalities had reached at least 30%. A number of managers now attach more importance to the use of local products than organic food. In 2017, 88% of municipalities had organic purchasing goals, in 2020 this share fell to 67%. The pandemic has also contributed to the decline in the desire to use organic products. In 2020, Lund was the town that offered the most organic products in public catering (75%). Four other municipalities had also already exceeded the target of 60%: Örebro (69%), Malmö (68%), Trosa (63%) and Södertälje (63%).

Many local authorities have set their own targets for collective catering, e.g., Malmö, Lund, Borlänge, Uppsala, Västerås and Södertälje: 100% organic ingredients by 2020. Some cities have their own organic farm, which facilitates local supply.

In nursery schools, about 53% of food purchased was organic, 61% in primary schools, junior high schools and high schools and 33% in retirement homes.

In 2018, more than 60% of organic food sold to the public sector was produced in Sweden.

Since 2014, a prize (*Eco Bread Award*) has been awarded each year to the city that has the most increased its purchases of organic bread and to the one that has purchased the most. In 2018, Danderyds and Lund² were awarded. This competition helped increase organic bread purchase by Swedish cities.

1- i.e., 1,200 patients

2- The municipality of Lund is the one that bought the most organic bread in 2018.



According to Ekomat, the additional purchase cost of organic products is between 10 and 12%. Since 2012, all the trains restaurants have been offering organic menus and a large number of hotels serve exclusively organic coffee and milk. In 2013, *KRAV* launched a *Restaurant for 1000* project to increase the number of organic certified restaurants and caterers.

In 2018 and 2019, organic products in restaurants were competed with by other products: local, fair trade, vegetarians, etc. There were fewer chefs communicating on the use of organic products than during the 2015-2017 period. A campaign to promote the introduction of organic products in commercial catering started late 2019. An application allowing the identification of restaurants with more than 25% of organic products nearby was launched.

Scandinavian Airlines has introduced an organic sandwich on 80,000 European flights. The requirement posed by *SAS* is that the entire product must be organic and made from Scandinavian raw materials¹. All *Stromma* boat restaurants are certified organic. ¼ of food offered there is organic.

In 2020, the market for organic food and drink in catering was strongly impacted by the pandemic.

■ In the **United Kingdom**, organic development in collective catering has been done thanks to the *Soil Association* which offers certification for collective catering, and which set up the *Food for Life* project in 2009, whose goal is to help schools improving the meals served. The canteens and restaurants are classified into three categories with the *Catering Mark: Gold* (at least 15% of organic products/week), *Silver* (use of organic ingredients) and *Bronze* (fresh and seasonal products). In 2018, ½ of British schools participated in this program², 156 nurseries, 50 universities, 39 public hospitals, 31 private ones and 64 local authorities' caterers. In 2019, an important milestone for this program was reached with more than two million meals served daily³. In 2018, there were 55 holders of the Gold mark, which represented 956 educational institutions.

Organic products barely exceeded 1% of collective catering purchases in 2018.

A growing number of wholesalers is certified organic (more than 30 early 2019), which helps producers to supply the public health and education sectors.

There is a network of pioneer cities promoting sustainable food: the *Sustainable Food Cities*. Their goal is the cooperation of public bodies, NGOs, businesses and communities to improve access to local, affordable and sustainable food. 26 cities had already obtained the *SFC Award* in 2019 and 68 other municipalities had taken steps to obtain it.

Chains of restaurants and restaurants of tourist attractions increasingly offer organic products. The *Soil Association* has set up an *Organic Served Here* brand that rewards catering institutions serving



between 15 and 100% organic products. 1 to 5 stars are awarded depending on the quantity of organic products served. Cafes and restaurants are increasingly asking the *Soil Association* to use this brand. There were 43 restaurants late 2019. According to a 2018 *Soil Association's* survey, ½ of Britons would be more inclined to choose a restaurant highlighting ethical or

1- This launch is a first step in this company's commitment to a more sustainable menu with more room for organic products in the future.

2- There is support from the Scottish Government to get all schools into this program.

3- Down in 2020 due to closures caused by the pandemic.



sustainable products. 43% believe that the restaurant or cafe will be better than the others if organic products are on the menu. But 72% think that it is not easy to identify restaurants offering organic food/drinks. According to a *Soil Association* survey, demand for organic outdoor meals is not being met at popular family attractions.

Edinburgh Royal Botanic Garden serves seasonal and organic products from its own vegetables garden.

In 2017, ½ of British restaurant chains already included organic products in their menus. Through its purchases of organic milk, *McDonald's* represented more than 10% of the organic market in out-of-home catering in 2019. Milk is the most widely used organic product in this sector.

According to a report from *Paymentsense UK 2019*, around ⅔ of Britons believe that ethical considerations are important when choosing where to eat. It revealed that about ⅓ of people under 35 and 30% of young families are willing to pay more for organic food when they eat out.

Conclusions on organic consumption

Common aspects to many EU countries

- The EU food market is changing, with the development of new consumption methods (online sales, drive and bulk), an increase in societal expectations of consumers (respect of the environment, locavorism and packaging reduction) and attention increased to the existing links between food and health.
- Large retailers are investing in organic products, both to meet market demand, but also to improve their image. In recent years, in most EU countries, the development of organic supply in mass distribution, especially under private labels, has contributed to the organic products democratization. In many countries where supply is emerging, the growth in organic sales is based on the development of the supply of large-scale distribution.
- In many countries, large-scale distribution has increased its organic market share at the expense of organic shops. The latter have lost in profitability, their staff sometimes seem less trained than before and, in some countries e.g., Germany, they look too much like conventional stores. Luckily, a number of organic shops are doing some innovations to stand out.
- In many countries, health is one of the main reasons to buy organic products. According to *CBI*, around 70% of Europeans believe that organic products are safer. Almost 80% of Europeans consider organic food to be better for the environment and produced with very limited use of pesticides.
- Young people, especially those from Generation Y, consume more organic products than their elders. According to a *Mintel* study carried out between August 2018 and July 2019, young people are more sensitive to organic products: 81% of young Frenchs are thus likely to buy organic products, as are 85% of Spaniards, 86% of Germans and 87% of Italians.
- Local origin is a very important selection criterion which often takes precedence over organic.



- More and more consumers are vegetarians or vegans. In many countries, there has been an increase in the number of people opting for a vegan diet for environmental reasons. This rise in vegetarianism/veganism can have a positive influence on organic consumption, as in the UK, or, on the contrary, lower organic sales, as in Sweden.
- Environmental protection is increasingly considered in consumers purchasing choices for food products.
- The organic label competes with many other food labels with ethical or sustainability attributes.
- According to a *Mintel* study carried out between 2018 and 2019, organic products represented 22% of new food products launched in France, 20% in Germany and 9% in Spain. At EU level, organic products represented 17% of new food products.
- The pandemic and the lockdowns had several effects:
 - They have accelerated the digitization of food distribution. Many organic chains have set up sites to sell their products online¹. Supermarkets have also seen their online sales increase. Consumers have started shopping for groceries online or have done so more.
 - The out-of-home sector has suffered greatly from the situation. Some restaurants have even had to close their doors.
 - There have been many innovations in the distribution of organic products to compensate for the loss of outlets in canteens and restaurants and to allow consumers to do their shopping without going inside the stores. Farmer drives, in particular, have developed.
 - Consumers cooked more during lockdown. They also became more interested in the links between food and health.
 - People eating organic products have rather increased their consumption by taking their meals at home.
 - Interest in local products has been heightened by the health crisis.
 - The health crisis has had many economic consequences. Some people in the EU have seen their income decline or have lost their jobs. This reduction in their purchasing power makes them more sensitive to food prices.

■ Differences between EU countries

- Knowledge of organic products is very uneven between Western & Northern Europe and the Central & Eastern European countries where it is generally much lower.
- Online organic sales are unevenly developed in the EU countries. The United Kingdom and France are the countries where they are the most developed. In 2017, the European average was estimated at 14% of the population making part of their food purchases online.

■ What future developments for the EU organic markets?

- The future growth of the EU organic market will depend on the increase in areas, the structuring of the sector, the development of processing tools dedicated to organic products,

¹ - With delivery or Click & Collect



the growth of organic ranges in the distribution channels, and, of course, on the consumers themselves.

Some EU countries export raw organic products and import processed ones. Moreover, some products are not available organically while they are produced locally in conventional.

The areas growth and the downstream development are strongly linked to the public policies that will be implemented over the next few years, whether at EU level or individual country level. The organic products promotion will remain essential to improve the level of consumers knowledge.

- The organic development in mass distribution is expected to continue in a large number of EU countries. According to an analysis by *Xerfi Precepta*, the organic supply in this channel should notably increase in France in the coming years.
- The takeover of specialist retailers, physical or online, by large retailers could continue.
- Europeans should take environmental protection more into account when choosing their purchases. According to *Mintel*, for the younger generations, the social and environmental impact of consumption is of great importance, which should help fuel the future growth of the organic sector.
- Online organic sales of organic products and basket systems are expected to continue to grow in most EU countries over the next few years. The increase interest of the younger generations for organic products makes this very likely.
- The sales growth in organic distribution will depend on the capacity of shops and chains to innovate.
- *Xerfi Percepta* expects a development of start-ups offering organic products at bargain prices.
- The organic products democratization should continue and affect more categories of the population. This should lead to an organic sales development in various channels, which will be more or less fast from one country to another. According to the *FIBL* and *Ecozept*, the organic market health depends on the diversity of the distribution of organic products.
- A debate on *high density food* is underway in the United States of America and other countries. This considers food real nutritional value. According to *Ekoweb*, this debate favours organic food. This kind of discussion could have a beneficial impact on EU markets.



- It is unclear whether the pandemic will have an overall negative or positive effect on the growth of the organic market over the next few years. Indeed, it has both generated an economic crisis and caused changes in consumer behaviour and distribution which are favourable to organic products.

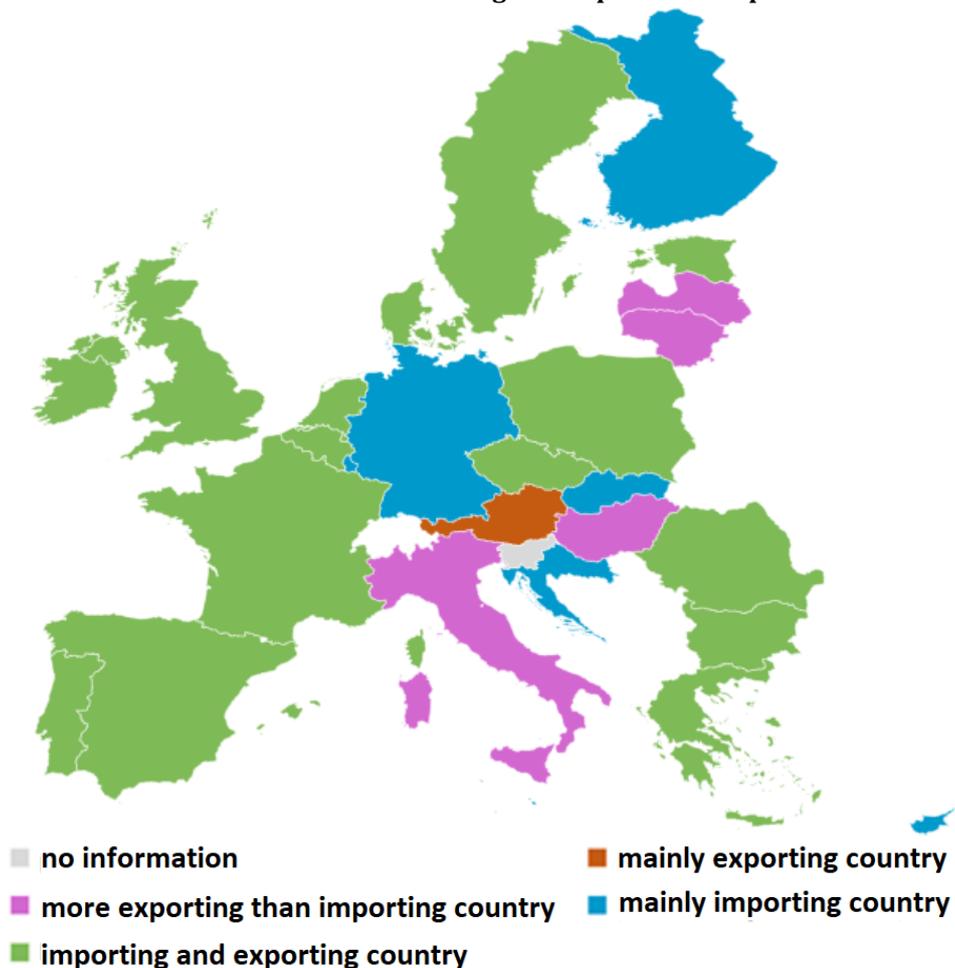


Exchanges of organic products¹

Main features

- Organic products still represent a small share of food exports for most EU countries: 2.4% in Sweden in 2017, 2.1% in Denmark in 2017, 1.9% in Spain in 2016 and around 1% in Finland in 2017.
- Many Eastern EU countries export raw organic products to Western Europe and import processed organic products, mainly from Italy, because they do not have enough processing tools. The Baltic States export around half of their organic production.
- Of the 27 EU countries for which information is available on organic product flows, fifteen are both importers and exporters, seven are mostly importers and five export far more than they import.

Profile of EU countries for organic imports and exports



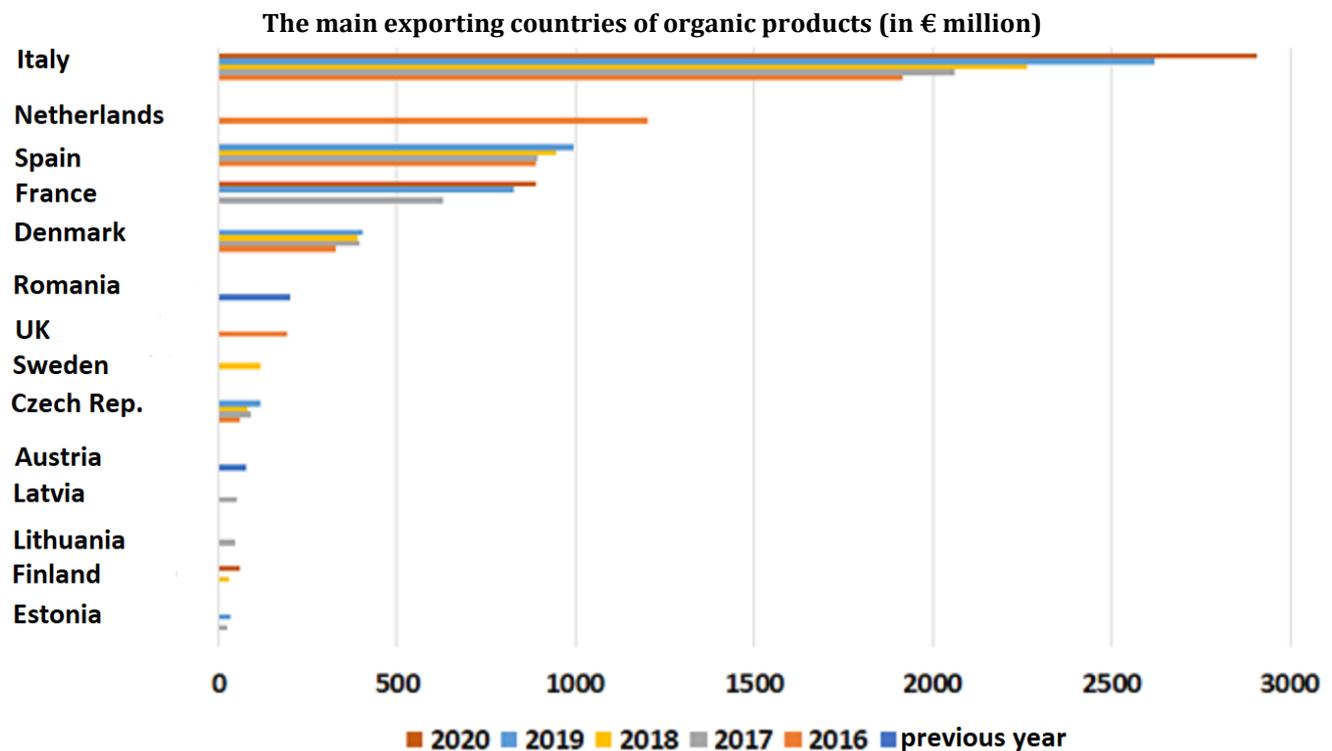
NB: Malta is mostly an importing country.

Source: Agence BIO/Many European sources

¹ - In this chapter, the terms imports and exports include flows within the European Union.



- **Italy**, the **Netherlands**, **Spain**, **France** and **Denmark** are the main exporting countries of organic products from the European Union.



N.B.: Data in value are not available for all countries exporting organic products.

Source: Agence BIO/Many European sources

- **Austria** exports organic products, especially dairy products.
- **Belgium** imports a lot of organic products, but also re-exports a large quantity.
- The organic products most exported by **Bulgaria** are honey, essential oils (rose and lavender), fragrant, aromatic and medicinal plants, fruits (including raspberries and strawberries), wild mushrooms, wines and sunflower oil. Bulgaria imports many organic products. Baby food is the first category imported. Since Bulgaria does not produce organic pork, poultry or eggs, it imports them completely.
- **Croatia** imports organic products from other EU countries and third countries. It is quite dependent on imports.
- In **Cyprus**, around 80% of the organic products available on the market are imported. These are mainly processed products. Imported organic products come mainly from Germany, Spain, France and the United Kingdom. Cyprus also exports some organic products: Halloumi cheese, citrus fruits, avocado and olive oil.
- In 2019, **Czech** organic imports amounted to € 115 million, an increase of 13% compared to 2018. In 2018, imports represented 60% of organic retail sales. Processed products represent around half of Czech organic imports. The Czech Republic is totally dependent on



imports of some categories of organic products such as oil. It also imports a lot of organic fruits & vegetables.

In 2019, Czech organic exports were € 118 million, which was very close to the value of its organic imports. This represents around 27% of its organic production.

- In **Denmark**, exports and imports of organic products have grown strongly in recent years. In 2019, organic exports grew by 4.2% in value compared to 2018. Denmark exports to the European Union, Asia and the USA. In 2019, dairy products and eggs represented 39.2% of Danish organic exports by value.

In 2019, organic imports increased by 8.9% in value compared to 2018. Fruits & vegetables were the main category of organic products imported in 2019 with a share of 41.9%.

- **Estonian** organic exports and imports have grown in recent years. Between 2017 and 2019, Estonian organic exports grew by 17% to reach € 31.9 million. In 2019, plant products represented 73% of Estonian organic exports by value. These were mainly cereals¹, ready meals, pulses and oilseeds, but also drinks, processed fruits, cereal and legume products, fragrant, aromatic and medicinal plants and dietary supplements. The main organic cereal exported by Estonia is oats.

Estonia imports a significant share of what is sold in supermarkets. It mainly imports organic products that cannot be grown on its territory such as some fruits & vegetables, wines and tea, but also processed products such as baby food.

- **Finnish** organic exports amounted to € 60 million in 2020, a doubling in two years. In 2020, organic products represented 3.4% by value of Finland's food exports. *Pro Luomu* estimates that organic exports could reach € 100 million in 2025. Regarding organic products, Finland mainly exports cereal-based products (especially oats), dairy products, berries (cranberries and blueberries), birch sap, potato starch and liquorice. It mainly exports its organic products to other EU countries, primarily Germany and Sweden, but also to other countries in northern and central Europe² and to China, Japan and USA.

The dependence of the Finnish organic market on imports is estimated at between 40 and 50%. Finland imports especially a lot of organic fruits & vegetables.

- In 2020, 33% by value of products consumed on the **French** market came from abroad. France imports organic tropical products such as bananas and other fruits, coffee, tea, cocoa and cane sugar and organic Mediterranean products such as durum wheat and its derivatives, fresh tomatoes and for the industry, fresh vegetables, citrus fruits and olive oil. It also imports some meat, cereal products, aquaculture products (mainly salmon and shrimp), fruits & vegetables and processed products.

French organic exports increased by 7.5% between 2019 and 2020. Wine represented more than half of French organic exports by value in 2019. A quarter of organic exports consisted of grocery products. France also exports fruit (apples and nuts), poultry, milk and cheese.

- **Germany** imports a lot of organic products. Nevertheless, the import rate has declined for a number of products in recent years due to increased domestic supply³.

1- 61% of exports of organic plant products

2- EU and non-EU

3- During the 2019/2020 campaign, imports of organic cereals, potatoes, fruit & milk fell compared to the previous campaign.



The most imported organic products are soybeans¹, field peas², dairy products³, carrots, potatoes, pork and cereals. In 2019/2020, it imported 15% of its organic cereal needs (compared to 17% in 2018/2019). The import share varies greatly from one cereal to another with, in 2019/2020: corn: 31%, wheat (including spelled): 26%, oats: 15%, barley: 8% and rye: 7%.

- **Hungary** exports around 80% of its organic production in the form of raw materials. Hungarian organic exports go to Europe. The main organic products exported are cereals and oilseeds. It also exports organic fish.

Hungary imports processed organic products such as cereal flakes, muesli and Mediterranean and tropical products (including olive oil and coconut products), as well as legumes (lentils and beans) and fresh fruits & vegetables.

- In **Ireland**, the organic sector is heavily dependent on organic food imports to meet market demand. Up to 70% of organic vegetables sold in retailers are imported. At the farm level, organic cereals are imported to feed the animals.

Beef and salmon remain the main exported products. 90% of organic salmon exports go to the European Union (mainly to France, Poland and Germany). In 2019, Ireland exported € 110 million worth of organic salmon.

- **Italian** organic exports grew by 11% during the year ending at the end of July 2021, topping € 2.9 billion. They have grown by 156% in ten years. They are growing much faster than total food exports. Organic products represented around 6% by value of Italian food exports during this year. Italy exports a lot of organic fruit, vegetables and wine. 42% in value of Italian wine exports were organic during this year. Organic products represented 76% of food exports under PDO and PGI.

However, Italy also imports organic products from other EU countries and third countries.

- **Latvia** exports a significant share of its organic production. These are mainly organic unprocessed cereals and potato starch. The export of organic beef is growing.

A significant share of the organic products sold in Latvia are imported, in particular vegetables. The least imported products are dairy products and cereals because they are produced locally.

- **Lithuania** exports a significant share of its organic production. It mainly exports unprocessed organic cereals. It also imports organic products because its climate does not allow it to grow all the organic products asked by consumers. The main imported organic products are fruits & vegetables and baby food. Dairy products, on the other hand, are almost exclusively produced locally.

- The **Netherlands** import organic products from the EU and third countries and re-export a significant share. Fruits & vegetables are the main organic products exported.

- **Poland** is highly dependent on imports of organic products. About 70% of organic products consumed in the country are imported.

1- Import rate in 2018/2019 campaign: 89%

2- Import rate in 2018/2019: 65%

3- In 2018/2019, Germany had to import 30% of the organic milk consumed in the country, 38% of yogurts and 43% of butter.



It also exports organic products. These are mainly frozen berries (strawberries, raspberries, currants, black currants, blueberries and gooseberries) and frozen rhubarb.

- **Romania** exports a large share of its organic production, both to other EU and third countries. However, this country is very dependent on imports (80% in 2017).

- **Slovakia** imports many categories of organic products. It also exports some cereal products, butter, milk, drinks and confectionery.

- In 2019, **Spanish** organic exports amounted to € 995 million, an increase of 5.1% compared to 2018. In 2019, Spain was the fourth largest exporter of organic products in the world. In 2019, Spain exported 43% by value of its organic production. 90% of its organic exports are to



the European Union. In 2019, fruits represented 29% of Spanish organic exports by value, vegetables and legumes 21%, olive oil 15%, wine 5.5%, cereals and cereal-based products 3.5% and aquaculture products 3.0%. Spain exports a lot of raw organic products and imports processed ones. It does not have enough tools for processing organic products, especially in Andalusia.

In 2019, organic imports increased by 1.9% compared to 2018, reaching € 1.070 billion. In 2019, 45.3% of organic products consumed in Spain came from abroad. For the second year in a row, organic imports exceeded exports. The main products imported in 2019 were cereals and cereal-based products (15% in value), fresh fruits (11%), fresh vegetables and legumes (10%), baby food and diet products (9%), dairy products (7%), canned vegetables and juices (6%) and coffee, tea and herbal teas (5%).

- **Sweden** exports organic products mainly to other EU countries and to a few third countries. It also imports organic products.

- The **United Kingdom** exports especially organic milk and salmon. It also imports organic products.

Trade inside the European Union

- A significant share of the organic trade takes place within the European Union.

Exports

- **Austria** mainly exports organic dairy products to other EU countries, mainly to Germany, Italy and France.

- **Bulgaria** exports organic fragrant, aromatic and medicinal plants and essential oils to other EU countries.

- In 2018, over 80% of organic exports by value from the **Czech Republic** were to the European Union. In 2019, the main destinations for Czech organic products were Germany, Slovakia and Poland. The Czech Republic also exports organic products to Austria.



- 76% of **Danish** organic exports were for other EU countries in 2019, mainly to Germany (39.8%), Sweden (13%), the Netherlands (7.9%) and France (5.7%). However, exports of organic products to the EU fell by 1.9% in 2019 compared to 2018.

In 2019, dairy products and eggs represented 69% by value of Danish organic exports to Germany, ahead of meat and meat products (11%). Fruits & vegetables were the main category of organic products exported to Sweden in 2019 (almost 39%), ahead of dairy products and eggs (12%). Almost two-thirds of Danish organic exports to the Netherlands consisted of dairy products and eggs in 2019. Regarding Danish organic exports to France, these were mainly meats and meat products (69%).

Denmark re-exports part of the organic cereals it imports, notably to Sweden and Germany.

- **Estonia** exports mainly organic products to the EU. These are mainly field crops and potato starch. In 2019, its organic exports to the EU amounted to € 27.8 million (i.e., 87% of its organic exports).

- **Finland** exports its organic products mainly to the EU. The main destinations are Denmark, Sweden, Germany and France. The main organic products exported to the EU are oats and oat products, bread, potato starch, berries and liquorice.

- **France** exports wines, cereals, meats, aquaculture products and organic groceries to other EU countries. In 2019, 67% of French organic exports were for the EU (53% for organic wines). In 2020, France exported 42% by volume of its organic wines production (nearly 1 million hl). This represented 7.2% of its wine exports by volume.

- **Germany** exports processed organic products to other EU countries.

- **Greece** exports olive oil, wine, and organic fruits & vegetables to other EU countries.

- **Hungary** exports organic cereals and oilseeds to other EU countries, mainly Germany, Austria, the Scandinavian countries and Italy.

- **Ireland** exports mainly organic aquaculture products to other EU countries, but also organic meat.

- In 2019, 77% of **Italian** organic exports went to other European countries (including non-EU). The main destinations were France (22%), Germany (17%), the Scandinavian countries (7%), Spain (6%), Austria (5%) and the United Kingdom (5%). The main organic products exported to the EU were fruits & vegetables, pasta, flour and wine.

- **Latvia** exports a significant share of its organic products to other EU countries.

- **Lithuania** exports its organic products mainly to other EU countries.

- In the EU, the **Netherlands** export 80% of its organic products to Germany, and then mainly to the rest of Western Europe. They mainly export fruits, vegetables and eggs. They have a significant re-export activity.

- **Portugal** mainly exports olives and organic wines to other EU countries.



- In the EU, the main destinations for **Romanian** organic products are Austria, Germany, France, Italy and Denmark. Romania exports a lot of organic peas and cereals to Germany. It also exports organic cereals to other countries.
- Around 90% of **Spanish** organic exports go to other EU countries. The main destinations for Spanish organic products are Germany, France, United Kingdom, Italy, Sweden and the Netherlands. Spain mainly exports fruit and vegetables, olive oil and organic wine to EU countries.
- 96% of **Swedish** organic exports go to Europe (including non-EU countries). The main destinations for Swedish organic products are Denmark, France, Germany and the United Kingdom. Sweden exports organic coffee, grains and berries to other EU countries. It exports organic chicken to Germany.
- The **UK** mainly exports organic milk and salmon to the EU.

Imports

- **Austria** imports unprocessed organic products from Romania. Imported processed organic products come mainly from Western Europe.
- **Belgium** imports organic fruit, vegetables and pork from the EU. Italy is its main EU supplier of organic fruits & vegetables.
- The **Bulgarian** organic market is more than 60% dependent on imports. In the EU, the main origins of organic products imported into Bulgaria are Austria, Germany, Italy, Greece and the Netherlands.
- **Croatia** imports mainly processed products from the EU.
- The main origins of organic products imported to **Cyprus** are Germany, Spain, the United Kingdom and France.
- In 2018, the **Czech Republic** imported processed organic products mainly from Germany, Austria, the United Kingdom and France. The imported organic fruits and vegetables came mainly from Western and Southern Europe.
- In 2019, 85.6% of **Danish** organic imports came from the European Union. In 2019, organic imports from the EU increased by 9.6% compared to 2018. In recent years, Denmark imports more organic products from other EU countries than it exported to them. In 2019, Germany accounted for 20.1% of Denmark's organic imports, ahead of the Netherlands (15.5%), Spain (13.7%) and Italy (12.3%). Denmark mainly buys organic fruit and vegetables, followed by cereals and cereal products from Germany and the Netherlands. Denmark mainly imports organic fruits and vegetables from Spain and Italy.
- **Finland** imports organic fruits & vegetables from the EU.



- In 2020, 55% of **French** organic imports came from the EU. The main organic products imported from other EU countries are olive oil, fruits and vegetables. Spain and Italy are the main origins of these products.
- **Germany** imports organic products mainly from other EU countries, including Austria, Denmark, Romania, the Czech Republic, Spain and Italy. Most of the organic dairy products imported by Germany come from the EU. Its main suppliers are Denmark, Austria, the Netherlands, the Czech Republic and Poland¹. Organic eggs imported in Germany come mainly from other EU countries. The first origin is Denmark. Although they are decreasing, Germany still imports significant volumes of organic field crops. In the EU, the main origins of imported organic cereals appear to be Poland, Romania, Slovakia, the Netherlands² and Austria. In 2017, more than half of the organic fodder peas imported into Germany came from Romania. Germany imports organic pork and beef. In 2018/2019, the import rate was 24% for organic pork and 9% for organic beef. Most organic pork comes from the EU, mainly from the Netherlands and Denmark. The imported organic beef is mainly intended for the production of minced meat. It comes mostly from the EU, mainly from Austria, Denmark and the Baltic States. In the EU, the main suppliers of organic fruits & vegetables to Germany are Spain and Italy. In 2018/2019, Germany imported 20% of its consumption of apples, 27% of potatoes and 42% of carrots. The Netherlands are the main source of imported organic carrots.
- **Luxembourg** is heavily dependent on organic imports, especially for fruits & vegetables, despite the growing supply of local organic products. Italy is the main source of organic products imported from the EU.
- The **Netherlands** import organic dairy products and eggs from Denmark, and fruits & vegetables from Italy and Spain. A significant share of imported organic fruits & vegetables is re-exported to other countries.
- **Portugal** imports organic products from Spain, France, Germany and Italy.
- **Poland** imports organic products mainly from Germany, the Netherlands and Belgium.
- **Romania** imports mainly organic products from Western Europe
- **Spain** imports from the EU processed organic products made from cereals, fruits & vegetables, baby food, dietetic products, dairy products and animal feed products. In the EU, Spain's main organic suppliers are Germany, France, the Netherlands and Italy.
- **Sweden** mainly imports organic fruits & vegetables. Some years, it also imports organic cereals. Denmark is its main supplier of organic products inside the European Union.

¹ - Raw milk for the Netherlands, Czech Republic and Poland

² - Re-exports



Trade with Third Countries

Exports of organic products to Third Countries

- The USA, Canada, China and Japan are the main third countries to which organic products from the European Union are exported.
- A number of EU countries are seeking to develop their organic exports to China.
- Organic exports are also developing towards the Middle East, especially for **Danish** organic products.
- EU organic products are also sold in other countries such as Switzerland, Russia, Mexico, South Korea and Australia.
- Almost 24% of **Danish** organic exports by value went to third countries in 2019, including 16.1% to Asia. China was the main destination outside the EU (6.8% of Danish organic exports). The main organic products exported by Denmark to third countries are processed products.
- In 2019, 13% of **Estonian** organic exports were sent to third countries. This represented € 4.1 million.
- **Hungary** exports organic products to European third countries, mainly to Switzerland. These are cereals and oilseeds.
- **Italy** exports a significant amount of organic products to the USA (especially wine, olive oil and pasta). Italian organic products seem especially popular with Americans.
- **Poland** exports in particular chokeberry juice and dried organic berries to South Korea and some countries in the Middle and Near East. Poland also exports organic chicken to Asia.
- The **Czech Republic** exported just under € 16 million of organic products to third countries in 2018. This represented 19% of Czech organic exports.



Imports of organic products from the Third Countries into the EU

At the global level:

- More than 80% of organic products imported into the European Union are certified by certification bodies recognized as equivalent in third countries. The remaining 20% is imported from a limited number of third countries considered to apply equivalent standards. The thirteen third countries with equivalence with the European Union are Australia, Argentina, Israel, Switzerland, New Zealand, Costa Rica, India, Tunisia, Japan, Canada, USA, South Korea and Chile.



■ Since October 2017, the CoI inspection certificate that accompanies every shipment entering the EU has gone electronic. In addition to the benefits of improving the traceability of organic consignments from third countries, the system made it possible to start collecting data and creating a database on organic imports: TRACES. The data collected is available in volume.

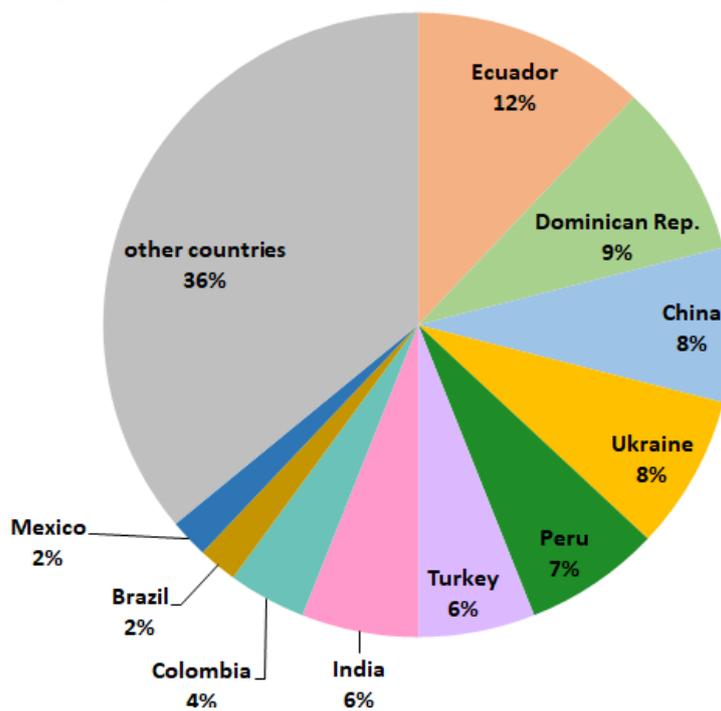
■ In 2020, 120 countries exported organic products to the European Union¹.

■ In 2020, the EU27 imported 2.79 million tons of organic products from third countries (excluding the UK, Switzerland and Norway). This represents a decrease of 1.9% compared to 2019. This decline should be put into perspective given that the EU had one less country and that 2020 was strongly marked by the COVID-19 pandemic. The main Member States importing organic products were the **Netherlands** (31% of volume), **Germany** (18%), **Belgium** (11%) and **France** (10%).

Processed products accounted for only 7% by volume of these imports.

■ In 2020, Ecuador became the main exporter of organic products to the European Union by volume, with a share of 12%, ahead of the Dominican Republic (9%).

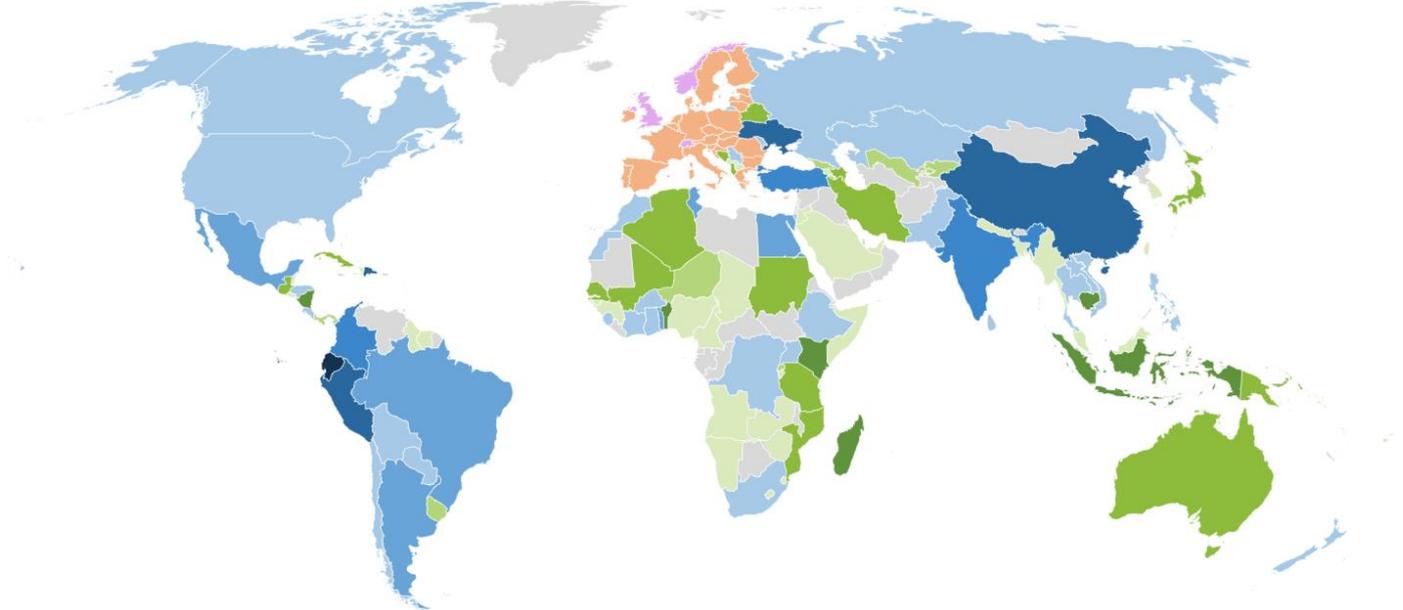
Breakdown of organic imports into the EU-27 by volume in 2020 by country of origin



¹ - With 27 countries



Countries that exported organic products to the EU27 in 2020



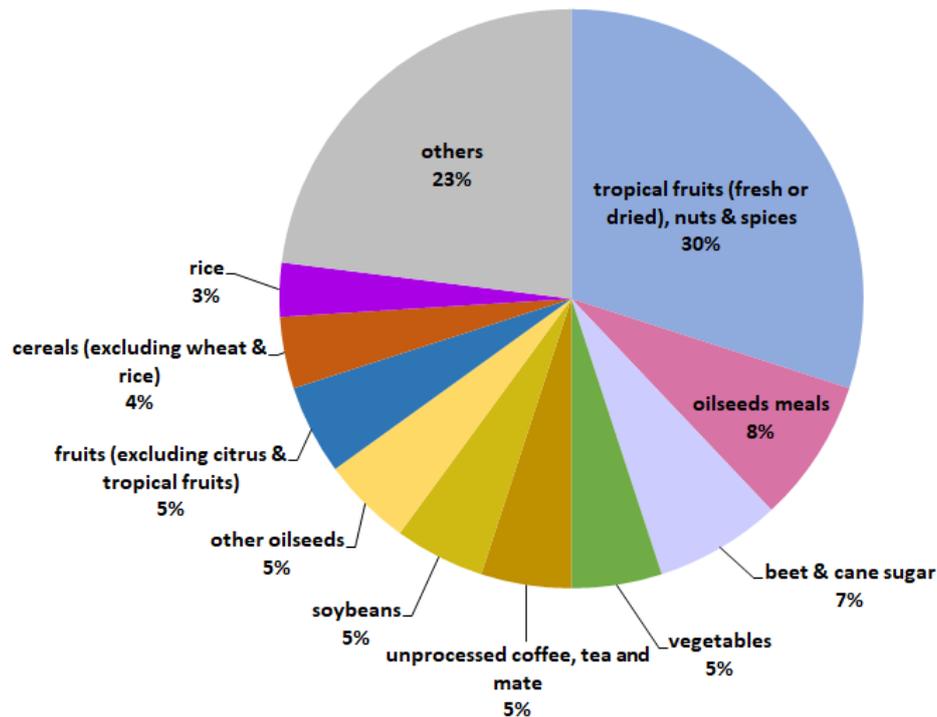
Source: Agence BIO/TRACES

■ Tropical fruits/nuts/spices constituted the main category of imported organic products with 30% of the volume, or 843,000 tons. Bananas made up the bulk of this category (almost 82%). In 2020, imports of tropical fruits/nuts/organic spices increased by 9% compared to 2019.





Breakdown of organic imports in the EU27 in volume in 2020 by major category



Source: Agence BIO/TRACES

■ In 2020, Ecuador exported 300,000 tons of organic tropical fruits/nuts/spices to the European Union (i.e. 35% of organic imports in this category). It also exported other organic products such as fruits & vegetables preparations.

In 2020, the Dominican Republic exported various categories of organic products to the EU: tropical fruits/nuts/spices, cocoa and citrus fruits.

China mainly exported organic soybeans to the EU. It also exported other oilseeds, tropical fruits/nuts/spices, vegetables, flour, as well as organic tea.

Ukraine exported mainly organic cereals (including wheat) and oilseeds (including soybeans) to the EU. It also sold fruit, oilseeds meals, vegetables and oils to the EU.

Peru mainly exported tropical fruits/nuts/organic spices to the EU. It also exported coffee/tea/mate, cocoa, cereals (including quinoa), sugar, other fruits, fruit juices and organic flour to the European Union.

Turkey exported vegetables, fruits (various categories), cereals (mainly wheat), fruit juices, oilseeds (excluding soybeans), tropical fruits/nuts/spices, fruits & vegetables preparations and processed products¹ to the EU.

Oilseeds meals were the main category of organic products exported from India to the EU. Indian organic exports also include sugar, rice, oilseeds (including soybeans), fruits & vegetable preparations, tea and tropical fruits/nuts/spices.

Colombia has become the EU's leading supplier of organic sugar. It also exported tropical fruits/nuts/spices, oil, citrus fruits and coffee/mate to the EU.

Brazil mainly exported organic sugar to the EU. It also sold other organic products to the EU: eggs, honey, fruit juices, oilseed meals, tropical fruits/nuts/spices and coffee/mate.

Mexico exported fruit juices, sugar, coffee, tropical fruits, organic honey, citrus fruits and plant extracts to the EU.

¹ - Especially for baby food



At country level:

- **Austria** imports organic products from third countries, especially Ukraine.

- Many organic products are imported into the EU via Flanders in **Belgium**. In 2019, over 376,500 tons¹ of organic products from third countries arrived in the EU through this region. A significant share of organic products imported by Belgium are sold to other EU countries. Almost half of the organic products imported into Flanders in 2019 came from Ecuador, Peru and the Dominican Republic. Fresh bananas represented nearly 46% of Flemish organic imports by volume in 2019. Next came unroasted coffee (7%), and sugars (7%). Cocoa beans and soybeans each accounted for only 4% of organic imports from third countries.

- **Croatia** imports organic products from India, Turkey, Brazil, Serbia, the USA and Egypt.

- The **Czech Republic** imports organic products from many third countries, including India, Argentina, Ukraine and Kazakhstan. In 2019, the Czech Republic imported 25,552 tons of organic products from third countries (+12% compared to 2018). In 2019, the main organic products imported from India were cane sugar, tea and food supplements.

- In 2019, 13.4% of **Danish** imports of organic products by value came from third countries, first and foremost China (6.9%). Denmark imports mainly organic products from Asia, but also from the two Americas. It imports animal feed, cereals and cereal products from Asia.

- **Estonia** imports organic wines from South America and South Africa, coconut products from Peru and tea from India.

- In 2020, 45% by value of imports of organic products into **France** came from third countries. These were mainly exotic products.

- **Germany** imports organic products from many third countries, including Ukraine. Those from Ukraine are mainly field crops.

- In 2020, **Italy** imported 231,596 tons of organic products from third countries (+10.2% compared to 2019). Cereals were the main organic category imported by Italy from these countries in 2020 (34.2% of the volume of organic imports), ahead of fresh and dried fruits (15.7%) and industrial crops² (13,5%). In 2020, imports of cereals increased by 24.5% compared to 2019, while those of industrial crops fell by 24.0%. In 2020, 29.3% of Italian organic imports from third countries came from Asia, 26.0% from European countries outside the EU and 21.2% from South America. Turkey remained the leading organic exporter to Italy (21.0% of volumes), ahead of Tunisia (11.6%) and China (11.4%). In 2019, 52% of organic cereals imported into Italy came from non-EU European countries and 39% from Asia. 69% of industrial crops came from Asia. A big share of the organic industrial

¹ 99% of Belgium's organic imports from third countries.

² Including soybeans and soybean meals, sunflower seeds, flax and peanuts



crops imported in 2019 by Italy came from China. Rice was imported from Pakistan, India and Thailand. Durum wheat came from Turkey. Soybeans and corn were imported from Ukraine. In 2019, 22.6% of imports came from Latin America (excluding Mexico). These were mainly apples, pears, sugar and coffee. Italy also exported processed organic fruits and vegetables from Mexico. In 2019, 71% of organic fresh and dried fruit imports came from Latin America. In 2019, the main African countries exporting organic products to Italy were Tunisia, Togo and Egypt. Almost all of the organic olive oil imported to Italy in 2019 came from Tunisia. Italy imported soybeans from Togo and vegetables and peanuts from Egypt. Italy imported wheat and maple syrup from North America in 2019.

Italy imports organic grapes and some organic wine from Argentina and Chile. It also imports some organic wines from Switzerland, but in much less quantity than from Latin America.

- **Latvia** imports organic products from the USA.
- The **Netherlands** are the leading importer of organic products from third countries, with a share of 31% in the EU in 2020. As in Belgium, a very large share of organic products is re-shipped to other EU countries.
- **Poland** imports organic products from third countries, especially from Turkey, China, Israel, Dominican Republic, Nicaragua, Moldova, Sri Lanka and Malaysia. The main organic products imported from third countries are sesame, soybeans, sunflower seeds, coconut oil, raisins, dates, bananas, tea and cane sugar.
- **Slovakia** imports organic products from many third countries. These are fruits & vegetables, cereal products, coffee, tea, spices, oil, beverages and oilseeds.
- In 2019, **Spain** imported 9,000 tons of organic products from third countries. These were mainly fruits & vegetables, cereals and soy products.
- **Sweden** imports especially organic coffee, tea and bananas from third countries.
- The **UK** imports organic products from third countries, including Ukraine.

Trade with the United Kingdom after the Brexit

- Since January 1st, 2021, the UK has its own laws for the production, processing, labelling and trade of organic food and feed. Organic standards will remain similar to those of the EU.
- Late 2020, the EU agreed to recognize the UK as equivalent for organic products until December 31, 2023. This is in addition to the recognition of equivalence agreed for UK regulatory bodies and the UK recognition of the EU as equivalent. The hat the possibility for British certified products to be sold as such in the EU is guaranteed longer than before.
- The UK has signed equivalency agreements with several countries, including the USA¹, Canada and Switzerland.
- UK organic companies may expand their exports to Australia, New Zealand and Asia.

¹ - The UK is the largest buyer of US organic products to date. It is difficult to know how this situation will develop.



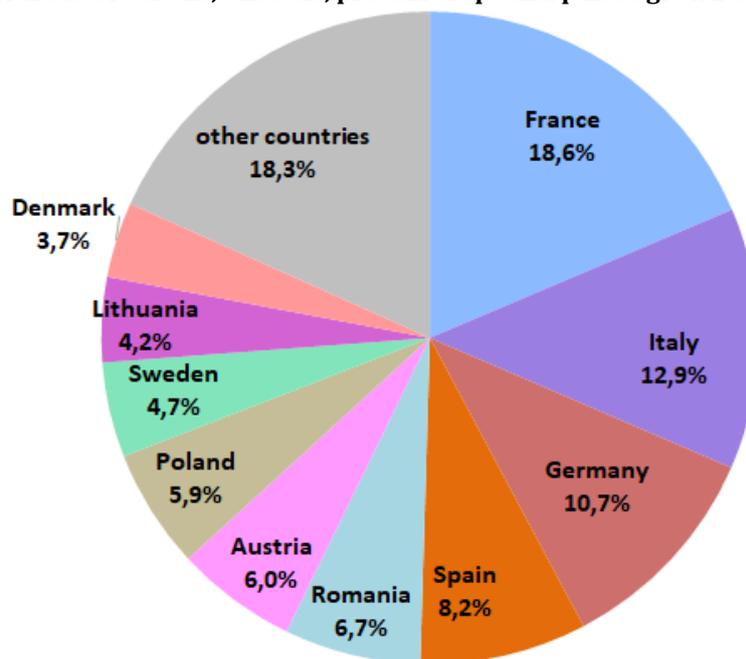
Focus on organic crops in the European Union

Cereals, oilseeds, protein crops and dry pulses: more than 3.1 million ha grown organically in 2019

■ In 2019, the areas of cereals, oilseeds, protein crops and pulses grown organically in the EU increased by 8.5% compared to 2018, amounting to more than 3.1 million ha. They have globally increased by 65% in 7 years. In 2019, the top ten countries represented almost 82% of the area of these categories of crops grown organically in the EU. **France** has been in first place since 2015. It is the country that has experienced the greatest increase in its areas dedicated to these crops in 5 years: +366,925 ha, an increase of 169%, ahead of **Italy** (+162,435 ha i.e., +67%).

In 2020, the French areas of these crops increased by 14%, exceeding 667,000 ha. According to our estimates, the EU in-conversion share was around 25% in 2019.

EU breakdown of areas of cereals, oilseeds, protein crops and pulses grown organically in 2019

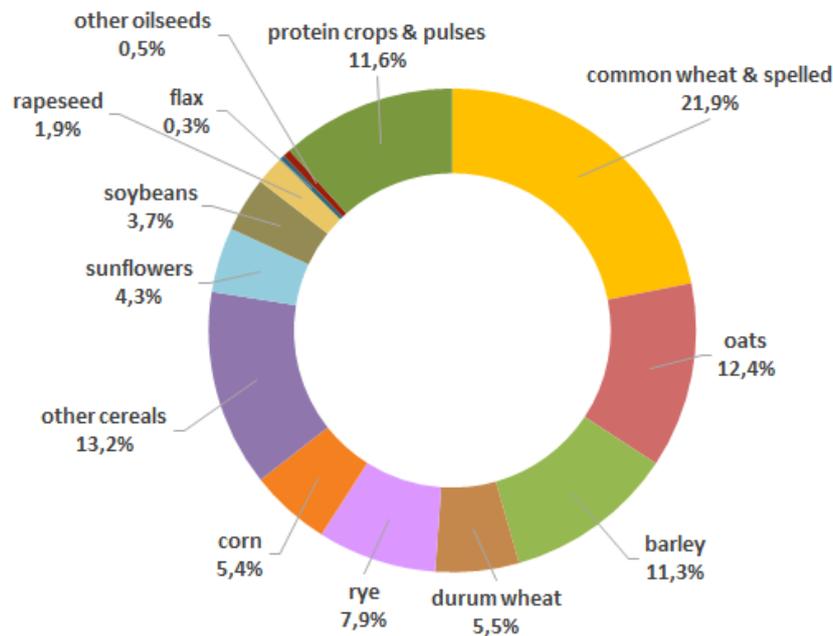


Source: Agence BIO/Many European sources

■ The wheat group remained the main organic crop of this category in the EU in 2019. Common wheat and spelled represented almost 22% of the area of organic cereals, oilseeds, protein crops and pulses grown organically in the EU in 2019.



Breakdown of areas of cereals, oilseeds, protein crops and pulses grown organically in the EU by species in 2019 (in ha)



Source: Agence BIO/Many European sources

Cereals: almost 17% of the EU areas grown organically in 2019

■ In 2019, the area of cereals grown organically exceeded 2.4 million ha, increasing by 9.4% compared to 2018. They represented 4.3% of the total area under cereals in 2019.

In 2019, 58% of organic cereal areas were in 5 countries: **France**¹ (18%), **Italy**² (14%), **Germany** (12%), **Spain**³ (9%) and **Poland** (6%).

In 2019, Austria was the country in which the share of cereals areas grown organically was the highest (17.6%), followed by Estonia (14.8%) and Sweden (13.1%).

French areas are those that have increased the most in recent years (+159% between 2014 and 2019).



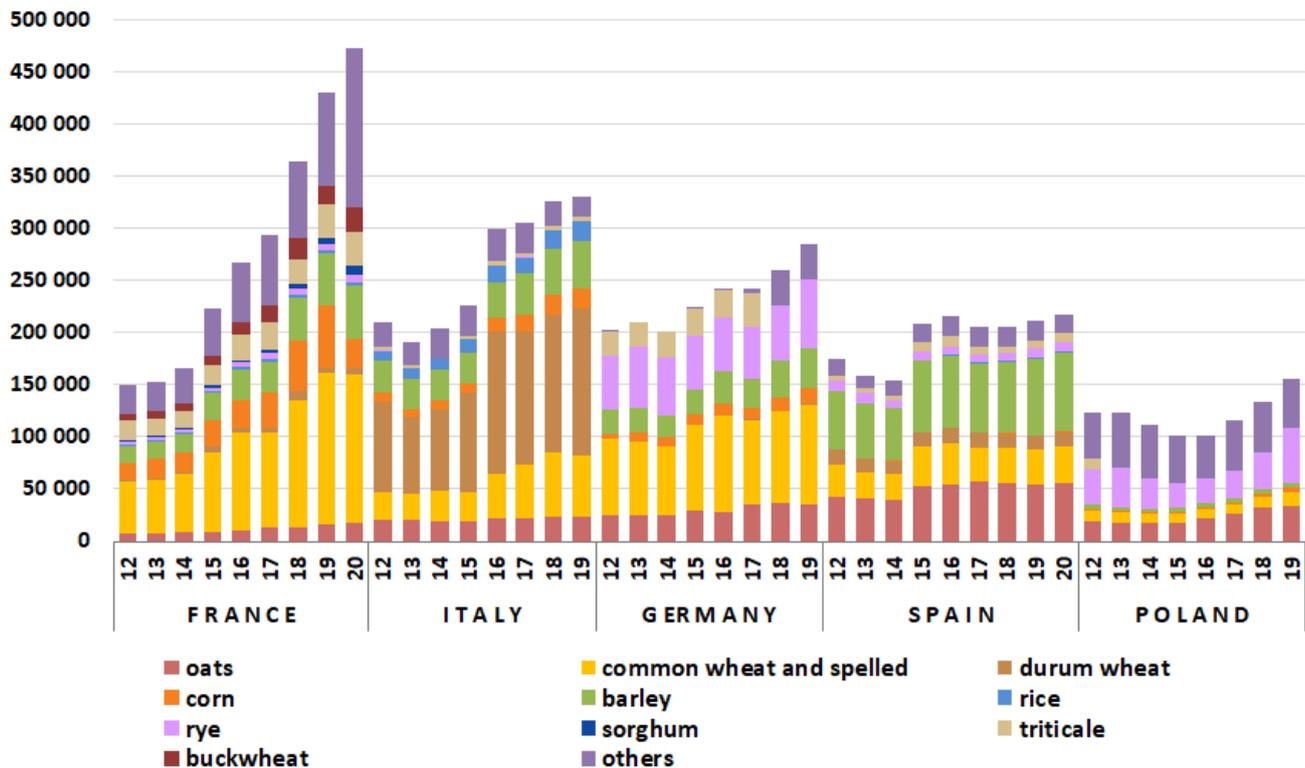
1- France is also the main EU producer of conventional cereals.

2- Puglia and Sicily represented a third of the area of organic crops in Italy in 2019.

3- Castile-La Mancha and Andalusia accounted for two thirds of the areas of organically grown cereals in Spain in 2019.



Development of the areas of cereals grown organically by species in the 5 main UE countries producing organic cereals (ha)



Source: Agence BIO/Many European sources

■ In 2019, common wheat and spelled were grown organically on more 687,300 ha (+13.1% compared to 2018). They are found in all the EU countries. France was in first position for this group of two cereals (144,672 ha including: common wheat: 133,495 ha and spelled: 11,176 ha), followed by Germany (95,838 ha). Common wheat is mainly used for bakery products.

■ Oats and barley come next (almost 389,300 ha and almost 355,600 ha in 2019). Spain was in first place for these productions in 2019: 54,037 ha of oats (i.e., 11.0% of the Spanish acreage of this cereal) and 73,607 ha of barley (i.e., 2.0%). Germany was the leading producer of organic rye in 2019 with 66,586 ha (11% of German rye acreage). In 2019, Italy's place remained predominant in the production of organic durum wheat and rice with 81% of the area of durum wheat grown organically in the EU and 69% of that of rice. This represented 141,129 ha of durum wheat in 2019 and 19,988 ha of rice (9.0% of national rice areas).

■ Although third in terms of organic cereals area, Germany is a net importer. The import share varies greatly from one cereal species to another and depending on the year. During the 2019/2020 campaign, the import rate of organic cereals was almost 15%¹, compared to 17% during the 2018/2019 campaign². In 2019/2020, the main suppliers of organic cereals were Poland and Slovakia.

In Germany, sales of organic breads increased by 18% in value in 2020 compared to 2019 and those of flour by 41%. AMI estimated the organic turnover of 768 bakeries with an organic range³ at € 480 million for 2019.

1- 17% for corn, 16% for common wheat and spelled, 18% for oats, 3% for barley and 2% for rye.

2- The 2018/2019 campaign was marked by a drop in harvest compared to the previous campaign, due to the drought.

3- 261 were in Bavaria.



The French market for organic bakery and fresh pastry was estimated at € 960 million for 2019 (+5% compared to 2018).

In Italy, sales of organic pasta in supermarkets amounted to € 49.7 million in 2020 (+1% compared to 2019), i.e., 6% of pasta sales in this channel.

In Denmark, the most popular organic cereal products are oatmeal (organic market share in value in 2019: 43.1%), pasta and oatmeal (29.0% each).

In Finland, breakfast cereals are the most popular with an organic market share by value of 14.0% in 2020.

In Belgium, the organic market share in value was 3.9% for bread in 2020, 5.0% for flour and 7.4% for rice.

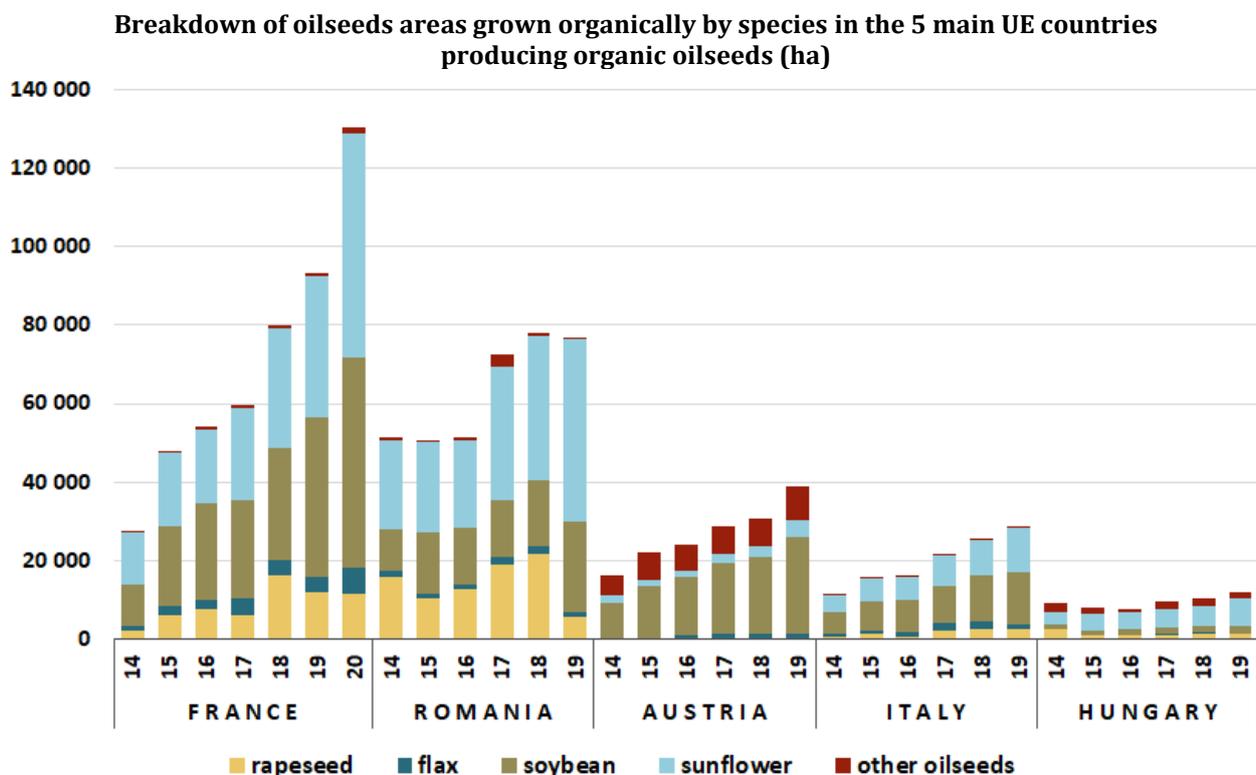
Oilseeds: increasing areas in 2019

■ With more than 339,000 ha, organic acreage represented about 2% of the total UE oilseeds area in 2019 and 2.3% of areas grown organically in the European Union.

Organically grown oilseeds grew 10.1% between 2018 and 2019.

In 2019, **France** and **Romania** together accounted for half of the organically grown oilseeds areas in the European Union.

The share of organically grown oilseeds varies greatly from one country to another: from very low in the UK to 24.5% in Austria in 2019. In France, it was 4.8% in 2019 and in Romania 4.3%.



Source: Agence BIO/Many European sources

■ Sunflowers¹ remained the main oilseed crop grown organically in the EU in 2019 (more than 136,400 ha). Romania was in first position with 32% of the areas, followed by France (26%). In 2019, 3.0% of Romanian sunflower areas were grown organically and 5.0% of French

¹ In conventional, the main species of oilseed grown in the European Union is soybeans



areas. Soybeans and the rapeseed group came next (more than 115,100 ha and more than 60,600 ha in 2019). France was in first place for soybeans in 2019 with 32% of the area and Romania for the rapeseed group with 27% of the area. However, only 1.0% of the Romanian rapeseed areas were grown organically in 2019.

35.8% of soybean areas were grown organically in Austria in 2019 (24.5% for oilseeds) and 26.0% in Germany (2.1% for oilseeds).

- The French market for organic oils continued to be dominated by olive oil. In Germany, organic oil sales increased by 22% in value between 2019 and 2020. In a few countries, organic oils already have a high market share in value: 34% in Denmark in 2018 (in supermarkets), 19% in Germany in 2017 and 18% in Finland in 2020.

Protein crops and pulses: stability of organic areas in 2019

- Proteins and pulses were grown organically on more than 365,800 ha in 2019, i.e., 16.8% of the area in this crops category and 2.5% of UE areas grown organically. The main cultivating countries of these organic crops were **France** (16.5%), **Italy**¹ (13%), **Germany** (11.4%) and **Spain**² (9.8%).

- In 2019, Austria stood out for the large share of its protein crops and pulses grown organically: 70%. In France, the share was 17.9% in 2019.

Organic sugar beet: mainly grown in Germany

- More than 11,000 ha of sugar beets were grown organically in the EU in 2019 (+58% compared to 2018), i.e., 0.7% the EU sugar beet areas in 2019.

Germany represented 42% of the area in 2019 with 4,614 ha (+26% compared to 2018). The production regions are Bavaria, Saxony, North Rhine-Westphalia and Lower Saxony. Only 1% of the German areas of sugar beets were grown organically in 2019. A significant share of the sugar beets organic production from southern Germany is for a Swiss factory: *Aarberg & Frauenfeld SA* (between 35,000 and 40,000 tons). Half of the sugar produced is sold in Switzerland and the rest goes to Germany.

Südzucker and *Nordzucker AG*, the 2 largest sugar producers in Germany, as well as the producer group *Rebio*, in the South of Germany, are currently campaigning to encourage German organic farms to start growing sugar beets.

Austria was in second place with 16% of the EU areas in 2019 with 1,725 ha. Austrian areas more than doubled between 2018 and 2019. The main production regions are Lower Austria (79% of Austrian areas in 2019) and Burgenland (17%). In 2019, 6.3% of sugar beet areas were grown organically. Austrian organic sugar beets are processed in a factory in the Czech Republic. The latter belongs to the Austrian group *Agrana*.

Lithuania came third in 2019 with 12% of the EU areas with 1,275 ha. Its areas increased by 69% in 2019 compared to 2018. 9.0% of Lithuanian sugar beet areas were grown organically in 2019.

1-Sicily: ¼ of Italian protein crops and pulses cultivated organically in 2019 and Puglia: 22%.

2- Castile-La Mancha: 53% of protein crops and pulses grown organically in Spain in 2019.



Italy was in fourth place in 2019. Organic beetroot is already grown in seven regions: Piedmont, Lombardy, Friuli, Marche, Umbria, Emilia Romagna and Veneto. Only 3% of sugar beet areas were grown organically in 2019. Italy aims to reach 80% of areas within a few years.

In France, organic sugar beet cultivation has grown significantly in recent years (+58% in 2019 and +147% in 2020). *Tereos* and *Cristal Union* have embarked on organic beet sugar. *Cristal Union*'s organic beets are processed in Corbeilles-en-Gâtinais, in the Loiret and those of *Tereos* in Attin in the Pas-de-Calais. *Cristal Union* produced 3,000 tons of organic sugar in 2020. These two companies wish to rapidly increase their production. *Cristal Union* should increase the area sown organically to 1,500 hectares in 2022.

- In 2020, 8 EU sugar factories processed beets into organic sugar.
 - In 2020, the EU imported 190,000 tons of organic beet and cane sugar (-9.7% compared to 2019) and 39,000 tons of other sugars (-2.7%). In 2020, Colombia was the EU's main supplier of organic sugar.
- In 2019, the German organic sugar market amounted to around 25,000 tons.
Italian supermarkets have started selling nationally produced organic beet sugar.

Vegetables: a various organic production

■ The areas of fresh vegetables (including potatoes and strawberries) grown organically amounted to almost 242,000 ha in 2019 (+3% compared to 2018). This represented only 1.6% of the EU areas grown organically in 2019 and 6.1% of the EU areas dedicated to vegetables.

■ **Italy** is the leading organic producer of these crops with 28% of EU area in 2019. Between 2009 and 2019, Italian areas of fresh vegetables doubled, reaching 66,812 ha. In 2019, Puglia was the first region for organic vegetables production (excluding potatoes) with 23% of the area. **France** came in second (34,917 ha in 2019) and **Poland** in third (29,631 ha).

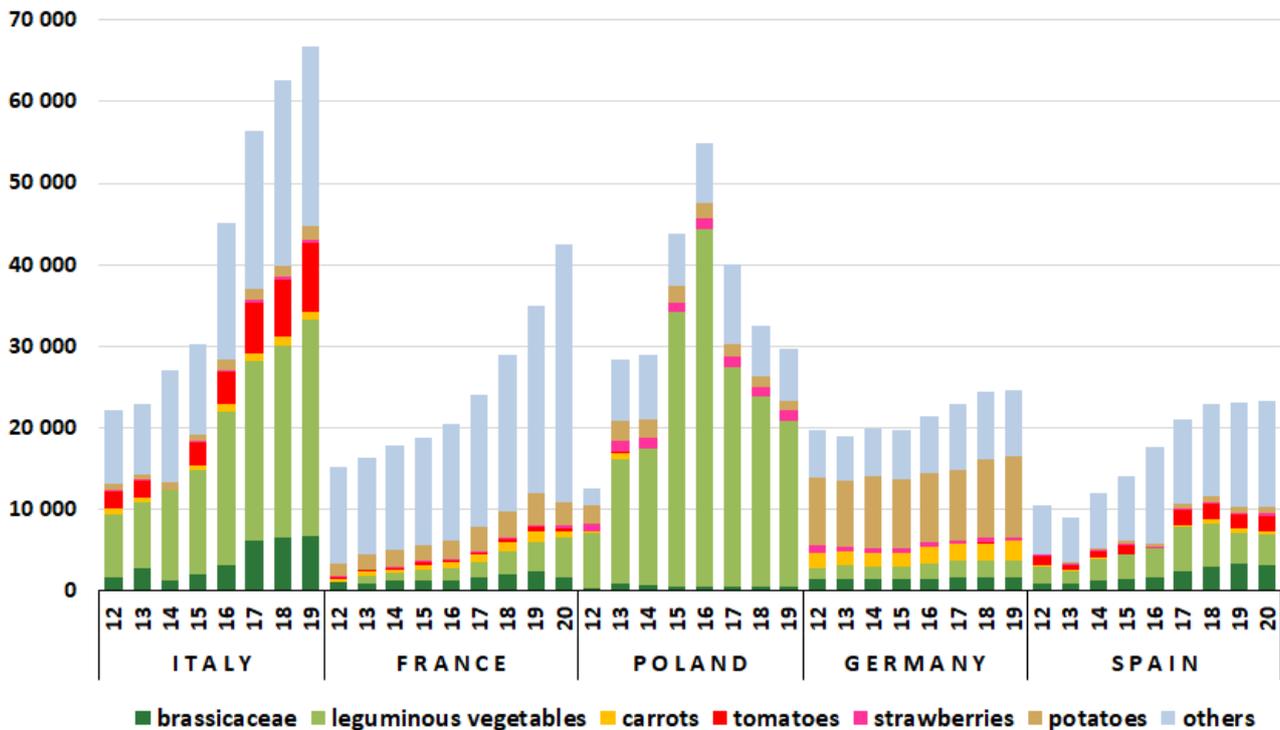


■ The share of vegetables areas grown organically varies greatly from one country to another. In 2019, it represented half of the vegetable areas (excluding potatoes) in Luxembourg and more than a third in Denmark. In 2019, the organic share (excluding potatoes) was 15.7% in Italy, 12.0% in France and 4.3% in Poland.

■ The distribution between the different categories of vegetables is quite variable from one country to another. Germany stands out with a substantial potatoes share (40% of organic vegetable areas in 2019), while leguminous vegetables represent a significant share of organic vegetables in Poland (67%) and Italy (40%).



Breakdown of vegetable areas grown organically in the 5 main EU countries (ha)



Source: Agence BIO/Many European sources

■ Potatoes: Almost 33,800 ha were grown organically in the EU in 2019 (+4% compared to 2018). Only 1% of EU potatoes areas were grown organically in 2019.

In 2019, 29% of organically grown potato areas in the European Union were in Germany, i.e., 9,895 ha. 3.0% of German potato areas were grown organically in 2019. Germany produced 240,000 tons of organic potatoes in 2019. The main production region for German organic potatoes is Lower Saxony.

Austria came second with 4,190 ha of organically grown potatoes in 2019, i.e., 12% of the EU organic potato area. 17.5% of Austrian potato areas were grown organically in 2019.

France came in third place with 12% of the EU area (3,981 ha).

In most EU countries, however, the share of organically grown potato areas remains relatively low (1.0% in 2019 for the whole EU).

■ Strawberries: Almost 3,500 ha were grown organically in the EU in 2019 (-2% compared to 2018), i.e., 3.3% of EU strawberry area.

In 2019, Poland was the main EU producer of organic strawberries¹ with 1,175 ha (34% of EU areas). Only 2.2% of the Polish strawberries area were grown organically in 2019.

Bulgaria stood out with 30.0% of its strawberries area grown organically in 2019.

¹ - Also first in conventional.



Organic fruits: Spain and Italy at the top

■ The EU areas of organically grown fruit¹ amounted to nearly 1.1 million ha in 2019 (+4.5% compared to 2018). In 2019, areas dedicated to fruit represented 7.3% of EU areas grown organically.

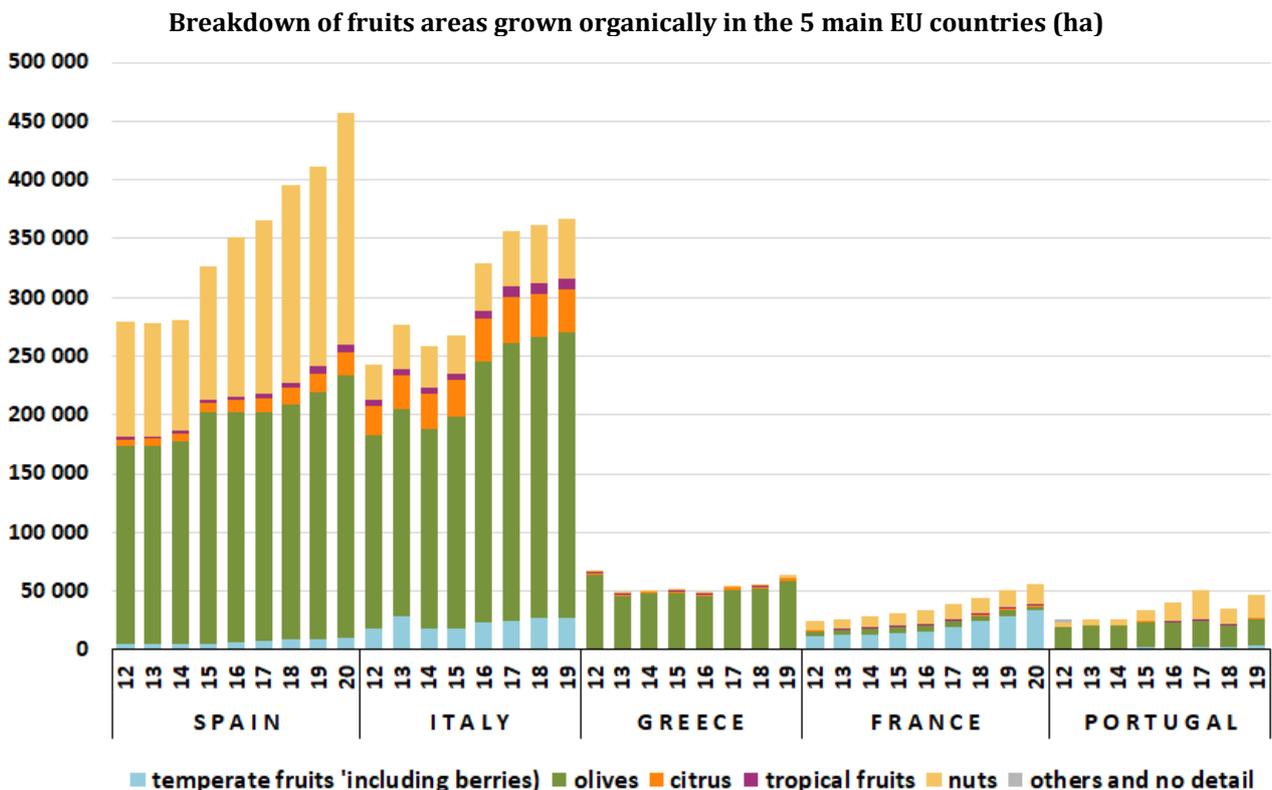
The main producer country is **Spain**², with 38% of the EU orchard cultivated organically in 2019, i.e., 411,651 ha. In 2020, the Spanish orchard dedicated to organic fruits grew by 11%. Andalusia remained the main region for organic fruit production in Spain in 2019 and 2020 (nearly 40% of the Spanish organic orchard in 2020).

Italy is in second place, with 367,202 ha in 2019 (+1.5% compared to 2018), i.e., 34% of the EU organic orchard.

As with vegetables, the share of organically grown orchards varies greatly from one country to another.

Austria stood out with 34.9% in 2019.

■ The distribution between the different categories of fruits changes from one country to another. In Spain, Italy, Greece and Portugal, olives are the main fruit grown organically (up to 90% of the area for organic fruit in Greece in 2019). In France, temperate fruits make up the highest share of the orchard grown organically.



Source: Agence BIO/Many European sources

1- This chapter does not concern strawberries and grapes.

2- In 2020, Spain and Italy were the two main producers of conventional fruits & vegetables in the EU.



- **Olive groves:** Nearly 541,800 ha grown organically in the EU in 2019 (+4.8% compared to 2018). This represented 10.7% of EU olive groves.

In 2019, Italy was the EU country with the largest area of olive groves grown organically with



45% of the area i.e., 242,708 ha (+1.5% compared to 2018). In 2019, 16% of Italian olive groves grown organically were in conversion. In 2019, 30% of Italian olive groves grown organically were in Puglia and 29% in Calabria. In 2019, Italy produced 40,099 tons of organic olive oil (9.3% of national olive oil production). Almost all of Italian organic olive production is used to produce oil. In 2019, Spain came in second place with 39% of the EU area with 209,288 ha (+4.6% compared to 2018). In 2020, the organic olive orchard grew by 6.4%, reaching 222,723 ha. The conversion share was 13% in 2019 and 16% in 2020. In 2020, 40% of Spanish olive groves grown organically were in Andalusia and 33% in Castile-La Mancha. Andalusia is the first European region for the production of organic olive oil. Spain produced more than 325,800 tons of

organic olives in 2020, 99% of which was for oil production.

In 2019, the share of olive groves grown organically was 21.3% in Italy, 8.0% in Spain and 32.5% in France.

Olive oil represents a significant share of Spanish organic exports.

However, the EU imported more than 47,000 tons of organic olive oil in 2020 (+41% compared to 2019), i.e., 1.7% by volume of EU organic imports and 16% of its olive oils imports. In 2020, organic olive oil imported by the EU came almost exclusively from Tunisia. A significant share is imported by Italy.

France and Germany are the EU's main markets for organic olive oil. In Germany, a large share of organic olive oil is sold under private label, either in organic distribution or in supermarkets. Biofach has launched a competition for organic olive oil.

More than two-thirds of Italian consumption of organic olive oil is made in the north of the country. In 2020, sales of extra virgin organic olive oil in Italian supermarkets increased by 5% in value, reaching 36.8 million (6% market share in value in supermarkets).

In Belgium, sales of organic olive oil are constantly increasing.

- **Nuts:** Almost 291,500 ha were grown organically in the EU in 2019 (+2% compared to 2018). This represented 23.5% of the EU areas dedicated to nuts.

58% of organically grown nuts orchards were in Spain in 2019, ahead of Italy (17%) and Portugal (7%).

Spanish areas increased by 1% in 2019, then by 16% in 2020, reaching 196,941 ha. In 2020, the in-conversion share was 26%. The production of organic nuts amounted to nearly 72,000 tons in Spain in 2020. In 2020, 22% of Spain's organic nut production came from Castile-La Mancha, 19% from Galicia and 18% from Andalusia. Almonds are the main production. They represented two-thirds of organic nut production in 2020. Chestnuts came in second with 20% of production in 2020.

Italian areas increased by 1% in 2019, reaching 50,612 ha. In 2019, the in-conversion share was 21%. The production of organic nuts amounted to nearly 41,000 tons in Italy in 2017. Sicily is the leading production region with 27% of the area grown organically in 2019. In Italy, production is more diversified than in Spain. A significant share of the Italian nut orchard was grown organically in 2017 (almond trees: nearly 30%, chestnut trees: nearly 71%, walnut trees: 37% and hazelnuts: 15%).



■ **Pome fruits:** Over 70,300 ha were grown organically in the EU in 2019 (+11% compared to 2018).

Apple is the first pome fruit grown organically. It represented 82% of pome fruit areas grown organically in the EU in 2019. 11.2% of apple orchards in the EU were grown organically in 2019. Apple orchard areas increased by 14% in 2019 versus 2018.

In 2019, France was the country with the largest pome fruit orchard grown organically with 23% of the EU areas, i.e., 6,287 ha. Apple trees represented 87% of French pome fruit orchard grown organically in 2019. 28% of French apple orchards were grown organically in 2019.

In 2019, 18% of the EU pome fruit orchard grown organically was in Italy, 14% in Poland and 11% in Germany. 14% of Italy's apple orchard was grown organically in 2019, 5% in Poland and 19% in Germany.

■ **Citrus:** In 2019, the orchard grown organically grew by 8% compared to 2018, exceeding 56,700 ha. 11.1% of the EU citrus orchard was grown organically in 2019.

65% of the listed citrus areas grown organically were in Italy in 2019, i.e., 36,808 ha. Italian areas increased by 3% in 2019 compared to 2018. 26.2% of the Italian citrus orchard was grown organically in 2019. 14% of Italian areas were in conversion in 2019. Italy produced nearly 908,000 tons of organic citrus fruits in 2017. Orange is the main organic production (more than half of the areas in 2019). 59% of the citrus orchard grown organically was in Sicily in 2019¹.

Spain was in second place, far behind Italy, with 16,691 ha in 2019 and 19,844 ha in 2020². Only 5.6% of the Spanish citrus orchard was grown organically in 2019. 39% of the area was under conversion in 2020. Spain produced more than 417,000 tons of organic citrus in 2020. In 2020, production of organic lemons and limes has slightly exceeded that of organic oranges, each accounting for 41% of organic citrus production in Spain. Andalusia was the main organic citrus growing region in 2020 (62% of organic citrus production).

■ **Berries³:** Over 40,600 ha were grown organically in the EU in 2019 (+4% compared to 2018). This represented 25.5% of the EU berry area.

Poland occupied the first place for berry areas grown organically in 2019 (39% of areas), but it is very likely that not all production is marketed organically. Poland produced more than 42,400 tons of organic berries in 2018. Polish areas grew by only 1% in 2019. The main organic berries produced in Poland are raspberries, currants, gooseberries and blueberries. The cultivation of the first three is mainly in the Lower Carpathians, in the region of Lublin and in Sainte-Croix, while organic blueberries are mainly grown the North and East.

In 2019, Lithuania came in second place with 9% of EU areas. It mainly produces organic blackcurrant.



1- Sicily's share was even 70% for organic orange orchards and 94% for lemon trees in 2019.

2- +19% in 2020.

3- Without strawberries



■ Stone fruit: Almost 49,800 ha of were grown organically in the EU in 2019 (-3% compared to 2018).

Italy was the leading producer of organic stone fruits with 27% of the EU area in 2019, i.e., 13,616 ha, of which 31% cherry trees, 25% apricot trees and 21% peach and nectarine trees. In 2019, 14% of Italian cherry trees were grown organically.

France was the second grower of organic stone fruits with 14% of the EU orchard. In 2019, 46% of the French stone fruit orchard grown organically consisted of plum trees and 19% apricot trees. 22% of French plum orchards was grown organically in 2019.

Bulgaria came third in 2019 with 12% of the EU orchard in 2019, of which 53% plum trees and 38% cherry trees. 40% of the Bulgarian plum orchard was grown organically in 2019.

■ Tropical & subtropical fruits: More than 20,200 ha were grown organically in 2019 (+17% compared to 2018). This represented 12.9% of the tropical and subtropical fruit areas grown in the European Union. In 2019, Italy was the leading EU producer of organic tropical fruits with 49% of EU areas, ahead of Spain (29%) and France (8%).

In 2019, 36.7% of Italian tropical fruit areas were grown organically. In Spain, the share was 8.1%.

In 2019, kiwis represented two thirds of tropical and subtropical fruit areas grown organically in Italy and 61% in France. In Spain, it represented only 2% of the area in 2019. The main tropical/subtropical fruits grown organically in Spain are avocado (37% of the area in 2020) and fig (27%). Andalusia remained the main production region for organic tropical and subtropical fruits in Spain (49% of the areas in 2020).

Organic fruit and vegetable market: very popular products

Fresh organic fruits and vegetables are among the most consumed organic products in the European Union. It is the main category of organic products sold in a number of EU countries, including more than a third of the Irish organic market, a third in Denmark, a quarter in the UK and almost a fifth in France. The most popular organic fruits and vegetables with EU consumers are bananas, apples, carrots and potatoes.

Organic vegetables represent a significant market share of vegetable by value in Denmark (24.7% in supermarkets in 2019¹), in Austria (21.4% for potatoes and 17.6% for other vegetables in supermarkets in 2020), in Sweden (12.2% in 2017) and in Belgium (8.2% in 2020). It is also in Denmark that organic fruits have the largest market share (22.7% in supermarkets in 2019²), ahead of Sweden (18.4% in 2017), Austria (11.7% in large retail in 2020), Finland (7.0% in 2020), Belgium (6.3% in 2020) and Italy (6% in mass distribution in 2020).



In Germany, organic vegetables sales increased by 29% in value between 2019 and 2020, those of organic potatoes by 4% and those of organic fruits by 25%. In 2020, carrots remained the main organic vegetable sold in Germany. In 2019, the market share of organic carrots was 31% in value. A third of 2019 lemon sales were organic. In 2017/2018, 87% of the volumes of

1- In 2019, the organic market share in value even amounted to 45.2% for carrots.

2- In 2019, the organic market share in value was 36.5% for bananas and 29.9% for oranges.



organic fruit and vegetables sold in Germany came from abroad, mainly from Spain. In 2018/2019, the import rate for organic apples was 20%.

The French organic fruit and vegetable market was valued at nearly € 2.1 billion in 2020, an increase of 12% compared to 2019. In 2018, 41% of organic fruits and vegetables consumed in France (in value) were imported.

In the United Kingdom, sales of organic fresh fruits and vegetables increased by 15.5% in supermarkets in 2020 compared to 2019.

In Denmark, after having more than doubled between 2015 and 2019, sales of organic fruits and vegetables in supermarkets grew by 21% in 2020, reaching € 780 million. This category represented 37% of organic retail sales in 2020.

Organic fruits and vegetables still represent a very important share of the Italian organic market. The best-selling organic fruits and vegetables in Italy are bananas, lemon, tomato, carrot, zucchini and apple.

Fragrant, aromatic and medicinal plants: over 85,900 ha grown organically in the EU in 2019

■ The areas of fragrant, aromatic and medicinal plants grown organically fell by 12.8% in 2019, reaching just over 85,900 ha.

In 2019, 25% of the areas were in **Poland**, 19% in **Bulgaria**, 12% in **France** and 11% in **Spain**.

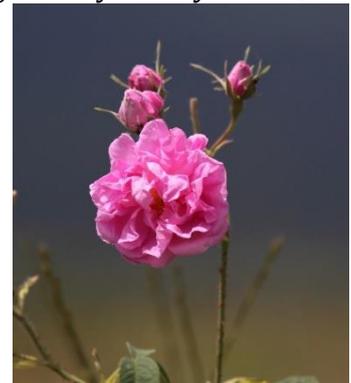
In 2019, areas fell in Poland (-25%), Bulgaria (-19%) and Spain (-14%) but increased by 13% in France.

In 2019, 23% of Polish areas grown organically were in conversion, 19% in Bulgaria, 17% in France and 42% in Spain.

Poland produced nearly 7,200 tons of organic fragrant, aromatic and medicinal plants in 2019. It produces a wide variety of aromatic plants (basil, parsley, oregano, rosemary, coriander, mint, lemon balm), mainly used for cooking.

In 2019, Bulgaria produced nearly 16,500 tons of organic fragrant, aromatic and medicinal plants. The main crop is lavender (42% of areas in 2019). Bulgaria is the EU's main organic lavender grower and the main producer of organic rose and lavender essential oils. Bulgarian organic lavender is mainly used to produce essential oil. The main Bulgarian lavender production areas are Kazanlak, Dobritch, Varna and Stara Zagora¹. France is the main destination for organic rose and lavender essential oils. Bulgaria also produces organic rose and lavender floral waters and organic lemon balm essential oil.

In 2019, 18% of French fragrant, aromatic and medicinal plants areas were grown organically. The main production regions are Provence-Alpes-Côte d'Azur², Auvergne-Rhône-Alpes³ and Occitanie. France produces many organic fragrant, aromatic and medicinal plants (more than 120 listed). The main French crops are lavender and lavandin (45% of organic fragrant, aromatic and medicinal plants areas together in 2019). They are also the main productions of organic fragrant, aromatic and medicinal plants in Provence-Alpes-Côte-d'Azur and Auvergne-Rhône-Alpes. In France, a quarter of the volumes of lavender essential oils produced in 2019 were organic and 4% of those of lavandin essential oil.



1- Kazanlak and Stara Zagora are in the center and Dobritch and Varna in the northwest.

2- Mainly in Vaucluse and in Alpes-de-Haute-Provence

3- Mainly in Drôme.



Coriander is the main fragrant, aromatic and medicinal organic plants grown in Occitania. Thyme is the most organically grown Provence herb in France. France also imports organic thyme from Spain and Portugal. Sales of organic Provence herbs in French supermarkets amounted to € 0.7 million in 2019.

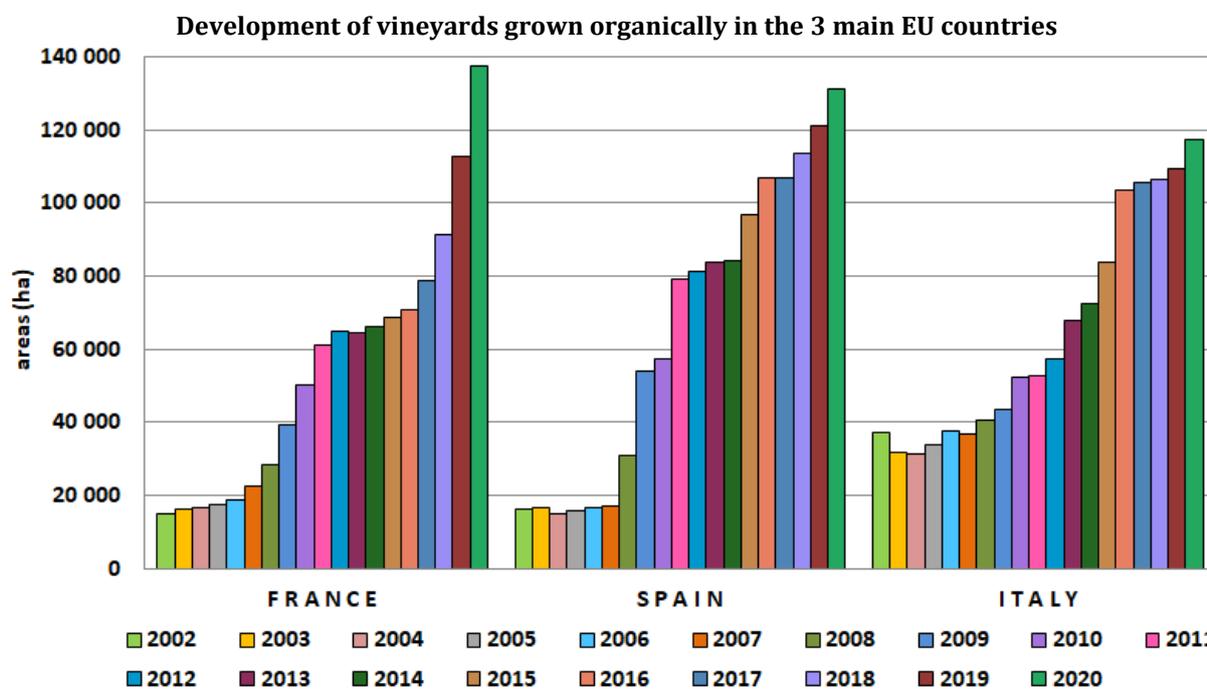
In 2019, Spain produced nearly 15,900 tons of organic fragrant, aromatic and medicinal plants.

Viticulture: nearly 379,800 ha of vines grown organically in the EU in 2019

■ The EU vineyard grown organically increased by 10% in 2019, exceeding 379,800 ha. Thus, the vineyard represented 2.6% of the areas grown organically in the EU in 2019. 12.1% of the EU vineyards were grown organically in 2019.

In 2019, 90% of the EU vineyards grown organically were in **Spain, France** and **Italy**.

In 2020, EU organically grown vineyards must have exceeded 422,000 ha.



Source: Agence BIO/Many European sources

In 2020, with an increase of 22%¹, the French vineyard grown organically surpassed the Spanish vineyard and reached 137,442 ha. The in-conversion share was 42% in France in 2020. 17.2% of the French vineyard was grown organically in 2020. Occitanie remained the main region for organic wine production in France (37% of the area in 2020). Four vineyards accounted for 75% of the volumes marketed in 2020 (Languedoc-Roussillon, Rhône, Bordeaux, Provence-Corsica).

The Spanish vineyard grew by 8% in 2020 to reach 131,183 ha. The in-conversion share was 21% in 2020. In Spain, 12.9% of the vineyard was grown organically in 2019. Castille-La Mancha remained the main production region in 2020 (48% of areas).

The Italian organic vineyard grew by 7% in 2020, reaching 117,378 ha. In 2019, Sicily was the main production region (29% of areas).

1- Growth was even 24% in 2019.



■ Almost all of the Spanish, Italian and French organic vineyards are dedicated to wine grapes. According to *IWSR/Millésime Bio*, the production of organic wines in Italy, Spain and France approached 10.6 million hl in 2018¹.

France produced 2.5 million hl of organic wines in 2019. According to *IWSR/Millésime Bio*, to meet market needs, France, Italy and Spain will considerably accelerate the conversion of their vineyards² to reach a production of 15 million hectolitres in 2023. This development should affect both still wines and sparkling wines. Italian organic production is expected to reach 6.9 million hl, French production nearly 4.6 million hl and Spanish production close to 4.5 million hl.

■ Italy is also the leading exporter of organic wines. It exported 88% of its production in 2018, while Spain exported 91% the same year and France 42% in 2020.

■ The EU top four markets (in volume) for organic still wine are Germany, France, United Kingdom and Sweden.

▶ The German market for organic still wines represented 1.2 million hl in 2017 (around 6% of the national market for still wines). Between 2012 and 2017, organic sales increased by 17.9% on average per year. Germany is the world's leading organic wines importer. The main origins of imported organic wines are Spain, Italy and France. Germany is the main destination for Spanish and Italian organic wines. Germany nevertheless exported 12% of its organic wine production in 2018.

The first marketing network is organic shops, followed by mass distribution. The latter has started to develop its organic wines range. 4% of Germans regularly buy organic wines. Light red wine is the organic wine the most bought by German consumers.

German wines represented 52% of the organic market in volume in 2018, ahead of Italian (20%), French (16%) and Spanish (6%) wines.

According to a *BÖLN* study, only 4% of wine consumers regularly buy organic wine. Buyers of organic wines are more numerous in Generations X and Y.

According to *Nielsen* and the *German Wine Institute*, organic wines represented 4% of wine sales by value in Germany in 2020.

▶ According to *AND-I*, organic wines consumption amounted to 1.3 million hectolitres in 2020. This represented 5.3% of French wine consumption. Sales of organic wines (excluding catering) amounted to € 1.1 billion in 2020, an increase of 13% compared to 2019.

The organic wines consumed in France are mainly of national origin. French consumers often buy their organic wines directly from winegrowers (45% of the market in value in 2020).

PDOs represented 67% of organic wines marketed in France in 2020. According to the 2021 edition of the *Agence BIO/CSA Barometer* on the consumption and perception of organic products: 17% of people consuming organic products at least once per month drank organic wine in 2020.



1- Which is probably an overestimate.

2- According to this study, the rate of conversion is expected to double in France.



According to *IWSR / Millésime Bio*, France is expected to become the world's leading market for organic wine from 2023 with one fifth of the total, overtaking Germany.

▶ More than half a million hl of organic still wines were consumed in the UK in 2017 (average annual growth in 2012-2017: +11.2%).

Large retail is the first distributor. In 2019, the sales in this channel increased by 47% compared to 2018. The organic wines supply has increased, both in supermarkets and in hard discount stores.

▶ Swedish consumption of organic wines has grown significantly in recent years. In 2020, organic wines reached a market share of 24% by volume (catering not included), compared to 2.6% in 2008. The Swedish Monopoly, *Systembolaget*, had 900 references of organic wines in 2018. In restaurants, the organic wines share would be even greater.

▶ More than 170,000 hl of organic still wines were consumed in Austria in 2017. Organic wines market share is around 8% in volume. When buying organic wine, Austrians generally prefer to choose a local wine

▶ Although Italy sells a significant share of its organic wine abroad, domestic consumption is also growing. In 2020, sales of organic wines in large retail increased by 15.5% in value compared to 2019. It is also increasingly common to find organic wines in wine merchants. As in France, organic wines are often purchased directly from the producers.

Red wines remain the organic wines preferred by Italian consumers (48% of organic wine sales in mass distribution). Almost all the organic wine consumed in Italy comes from the country.

In 2020, PDOs represented 52% of organic wine sales in large retail.

▶ The majority of Spanish organic wines is exported. However, the organic share in the Spanish wine market increased from 0.6% in 2012 to 5.0% in 2017. Around 117,000 hl of organic still wines were consumed in Spain in 2017. According to *IWSR/Millésime Bio*, the Spanish market should take off by 2023.

▶ Hungary consumed more than 108,000 hl of organic still wines in 2017.

▶ In Denmark, sales of organic wines continued to grow in 2019 with a 19% increase in value compared to 2018.

▶ In the Netherlands, organic wines are still niche products but their sales are growing. Organic wines range in mass distribution is increasing. It was twenty organic wines on average in 2019. Around 7% of the wines offered by the Netherlands' leading wine merchant chain are organic. Dutch consumers are increasingly looking for the EU organic logo when choosing a wine. Almost 9 in 10 Dutch people have tasted organic wine at least once.

▶ In Finland, the *Alko* monopoly more than tripled its organic range between 2015 and 2020, reaching 1,412 organic references, including 1,270 wines and 31 beers. In 2020, *Alko's* organic sales grew by 29% in volume, representing 11% of its total sales.

▶ Estonian consumers are starting to take more interest in organic wines.



Focus on organic animal productions in the EU

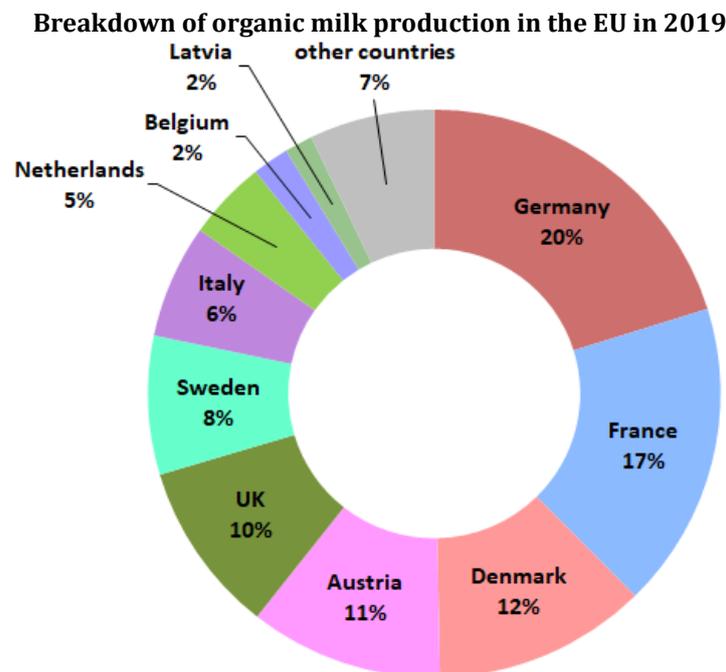
Organic cow milk: nearly 5.9 million tons in 2019

■ Nearly 986,600 dairy cows were certified organic in the EU in 2019 (+5.4% compared to 2018), i.e., more than 4% of the livestock.

EU organic cow milk production is estimated at almost 5.9 million tons for 2019, i.e., 3.5% of total cow's milk production. According to initial estimates, organic milk production has approached 6.1 million tons in 2020.

In 2019, 61% of EU organic cow milk production was carried out in **Germany**, **France**, **Denmark** and **Austria**.

The Danish organic dairy sector has benefited from research support since the 1990s, which played a decisive role in the initial development of the sector (e.g., by establishing economic benchmarks to showed the banks the profitability of organic dairy farms).



*NB : Il s'agit de la collecte pour l'Allemagne, la France, le Danemark et l'Autriche.
Source: Agence BIO/Many European sources*

The development of organic cow milk production varies from one country to another: between 2009 and 2019, it almost quadrupled in France, more than doubled in Germany and doubled in Sweden. It progressed less quickly in Denmark¹, Austria and the United Kingdom².

The number of conversions from dairy farms to organic increased after the end of the EU market milk quotas in 2015. Significant price differences between organic and conventional milk also had a very favourable impact on conversions during several years. Moreover, processors, such as *Arla Foods*³, have encouraged dairy farmers to convert their farms to meet

1- In the early 2010s, dairies no longer accepted new organic deliverers.

2- The economic crisis of 2008 was followed by waves of deconversions of organic dairy farms until 2013. The sector then started to grow again.

3- Present in Denmark, Sweden, Germany, Netherlands, Belgium, Luxembourg and UK



growing demand. According to the OMSCO, these additional conversions were well absorbed by EU markets with limited impact on farm gate prices, despite some signs of excess milk supply in some countries. Besides, there should be fewer conversions in the coming years and the growth in demand should be covered by the organic milk currently available and by increased production from organic producers. The 2018 drought affected production in several EU countries, especially in key growing areas in northern and western Europe. The UK, France, Belgium, the Netherlands and Denmark all saw production declines before recovering in the fall. In 2018, there were significant conversions in the dairy sector in Germany, Denmark and France¹.

German organic collection increased by 6.0% in 2019, then by 4.2% in 2020, exceeding 1.2 million tons. As Germany has resorted less to imports² due to the increase in its own availability, this has reduced the outlets for Austrian organic milk.

In France, organic collection increased by 18% in 2019, then by 12% in 2020, approaching 1.15 million tons.

Danish, Austrian and British organic collections have changed little in recent years. Swedish organic collection even saw a decline of 0.2% in 2019. In Sweden, there is a surplus of organic dairy products. The reasons for this are a drop in Swedish demand, a decline in sales in catering services during the health crisis and a drop in the price of organic milk.

Organic milk share in the national deliveries or production varies from one country to another. Austria is the country where it is highest with 19.1% in 2020, ahead of Sweden (17% in 2019) and Denmark (12.8% in 2020). It stood at 3.8% in Germany and 4.6% in France in 2020. The European Commission estimates that EU organic milk production should continue to grow to reach 7% of total milk production in 2030.



■ Among the 40 German dairies with organic activity, thirteen are completely organic. A large organic milk share is collected by five dairies. Bavaria accounts for almost half of the German organic milk deliveries ($\frac{1}{4}$ in conventional). In 2016, 5.9% of the Bavarian cow's milk deliveries were organic. Most of the organic milk processing sites are in this Land.

In France, there were 126 collectors of organic cow's milk in 2019. 218 establishments³ processed organic milk. Brittany and Pays de la Loire are the two main regions for organic milk collection. In 2019, they represented 42% of French organic collection.

In Denmark, although there is only one fully organic processor, five others process both organic and conventional milk. 3 organic milk processors, including *Arla Foods*⁴, represent more than 80% of organic milk collection.

Since 2017, all 85 Austrian dairies have had organic activity (the last started in 2016). Most of them are cooperatives. The share of Austrian organic milk processed domestically has increased in recent years.

In the UK, *OMSCO* is the main collector of organic milk. The Danish group *Arla Foods* also collects British organic milk.

Around 20 Dutch dairy processors had an organic activity in 2018.

1- For France, this is the third wave of conversion, after those at the end of the 2000s/early 2010s and 2015.

2- In the broad sense. It is mainly trade inside the European Union.

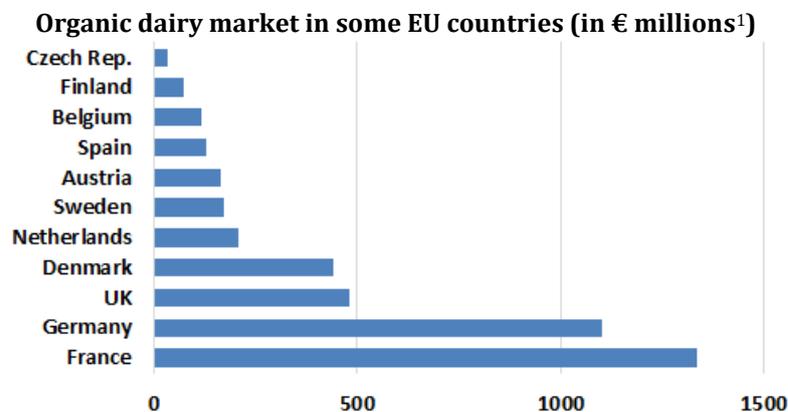
3- All milks combined

4- *Arla Foods* largely dominates the organic sector but its hegemony is however less marked than in the conventional sector.



Packaged milk is the first organic dairy product produced in most countries. The European Commission has estimated that around $\frac{1}{4}$ of raw organic milk processed in the EU is used to produce packaged milk. Austria stands out for its large organic milk share used for cheese and butter production (around half). A number of collectors have invested in drying for the production of milk powder and whey powder. Germany, Denmark and Sweden are major producers of organic cheeses.

■ According to our estimates, the EU organic dairy market was above € 4 billion in 2018. Organic dairy consumption is mainly developed in producing countries. In Germany and France, organic dairy market already exceeds € 1 billion. Organic dairy sales have increased in many EU countries in recent years and the offer has been enriched with new products, especially for cheeses. There are many innovations in this sector, whether on the products themselves or on the packaging.



Source: Agence BIO/Many European sources

In Germany, sales of organic dairy products continued to be dynamic in 2020: sales of organic milk increased by 16% in value, those of organic cheeses by 21%, those of yogurts by 15% and those of organic butter by 8%². In the first half of 2021, the volumes of organic milk purchased by German households increased by 10% compared to the first half of 2020. In Germany, a large share of organic milk is sold under private labels (around 80% in 2015). In recent years, a communication campaign to encourage the introduction of organic milk in canteens has taken place in Germany and a practical guide has been distributed.

The French market for organic dairy products grew by nearly 8% in 2020 compared to 2019. On the other hand, sales of organic dairy products fell in supermarkets during the first half of 2021. Milk is the main organic dairy product consumed in France (nearly a third of this market in 2020).

In the United Kingdom, organic dairy sales in supermarkets increased by 7.7% in 2020 compared to 2019. Sales of organic milk have declined, but those of other organic dairy products have increased. More than one in four UK households buy organic milk. In 2018, 78% of organic milk sales were made under private labels³.

The Danish organic dairy market has been developed for a long time.

1- The German organic dairy market is probably underestimated. For Austria, it is only sales in large-scale distribution.

2- Sales of organic dairy products increased sharply during the first lockdown of 2020.

3- While this share is much lower for other categories of products in the conventional range, such as, e.g., filtered milk and dairy products substitutes, for which private labels only represent 18% of sales.



In Italy, organic dairy consumption has increased in recent years. Yoghurts are the main organic dairy products sold in mass distribution with € 46.7 million in 2020. However, their sales fell by 3% in this channel in 2020. The market share of organic yogurts rose to 5% in value in 2020. Fresh organic milk comes in second with sales amounting to € 39.6 million in 2020 (+5% compared to 2019), i.e., 10% in value of fresh milk sold in this channel. Sales of organic long-life milk increased by 21.7% in this channel in 2020 and those of organic hard cheeses by 63.4%. The Dutch organic dairy market grew 11% in 2017 and 9% in 2018 and should continue to grow in the coming years.

In Sweden, the dairy product market is doing worse than the rest of the organic market as many consumers turn to dairy product substitutes. In 2019, organic dairy sales even fell by 5%. A significant share of Swedish organic milk needs to be sold as conventional (around a third in 2020). Nevertheless, *Arla* decided to invest in its organic milk processing plant in Västergötland. The target is to double the organic milk processing capacity from 2023 to be able to develop the organic range.

In Finland, organic milk sales growth slowed in 2019. As in Sweden, consumers are increasingly turning to milk substitutes.

Organic dairy products should experience sales growth over the next few years in Ireland and Poland, where these products are increasingly popular.

Organic dairy products often represent a significant share in the organic market, with e.g., 21% in Denmark in large retail in 2019, 25.4% in the UK in 2020, 20.2% in Italy in mass distribution in 2020, 20% in the Czech Republic in 2018 and 11% in France in 2020.

The organic share in the national dairy consumption is generally not negligible, with e.g., 11% in Sweden in 2017, 10.4% in Austria in 2017, 5.8% in France in 2019, 4.2% in Belgium in 2020, 4.1% in the Netherlands in 2019 and 3.9% in the UK in 2019¹.

In the case of packaged milk, which is often the main organic dairy product consumed, the share in value was even higher, e.g., in Denmark (mass distribution : 32.3% in 2019), in Austria (in large retail: 26.1% in 2020), in France (15.7% in 2019), in Germany (12.1% in 2017), in Sweden (more than 10% since several years), in Italy (6.3% for fresh milk in 2017), in the UK (5.5% in 2019), in Belgium (4.8% in 2020) and in Finland (4.5% in 2020). However, it was still very low in Spain.



■ A large share of organic milk and organic dairy products are traded within the EU, but some is also exported to third countries. According to *Institut de l'élevage*, trade in organic milk will certainly increase over the next few years. Denmark and Austria are the countries that export the most organic dairy products: the equivalent of about half of Danish production and 40% for Austria.

In Denmark, it is mainly the *Arla Foods* group which exports organic dairy products. *Thise* also exports. Butter is the main Danish organic dairy product exported. In 2017, dairy products represented around half of the value of Danish organic exports². Denmark exports its organic dairy products to Europe and China³. It should develop its exports to the Middle East over the next few years. *Arla Foods* organic products have been sold in the United Arab Emirates since

1- In value

2- In 2017, Danish exports of organic milk, butter and eggs exceeded € 134 million.

3- In China, organic baby food sector is experiencing strong growth. It is considered a promising market for many EU countries which invest in drying equipment for the production of organic milk and whey powders. It is also the first destination for EU conventional dairy products.



2017. Austria exports a lot of milk to Germany, but, according to *l'Institut de l'élevage*, should sell increasingly to other countries like France, the USA and Switzerland. It already exports some organic milk powder to China.

The United Kingdom sold around 7%¹ of its organic milk in value abroad in 2017. Its organic milk exports increased by 50% in 2018, exceeding 46,400 tons. According to *OMSCO*, they should amount to 51,600 tons for 2019. A decade ago, exports concerned only milk. Today, they are much more diverse. In late 2015, *OMSCO* obtained Chinese organic certification, which allowed it to export long-life organic milk to China.

Germany is the main destination for EU organic dairy products. It imports some organic dairy products in large quantities, while it exports others (especially milk powder to Asia). 80% of organic dairy products imported by Germany come from Denmark and Austria. Most of the imports are in the form of raw milk and packaged milk. Import rates developed differently depending on the products between the 2015/2016 and 2016/2017 marketing years: decrease for butter (46% to 43%), slight increase for fluid milk (36% to 37%) and stability for yogurts (13%). In 2019/2020, Germany imported less organic milk than in previous campaigns due to an increase in production.



The Netherlands imported nearly 41,300 tons of organic milk in 2017 and, presumably, more than 51,500 tons in 2018².

2% of organic dairy products consumed in France in 2018 came from abroad. ½ of the organic dairy products consumed in Sweden came from abroad in 2013, but Sweden has become more self-sufficient. Italy imports organic Austrian milk.

2.4% of organic milk and 2.1% of other organic dairy products consumed in France in 2019 came from abroad (from the European Union).

Arla Sweden is expected to export more organic milk powder to China in the coming years.

Italy imports Austrian organic milk.

In Poland, the production of local organic dairy products does not meet the growing demand.

Organic goats: Greece in the lead for livestock

■ More than one million of goats were certified organic in the EU in 2019 (+6.9% compared to 2018). This represented 8,5% of the EU goats livestock.

■ **Greece** remained in first place in 2019 with 48.2% of EU organic goats, ahead of **France** (12,1%), **Italy** (9,6%), **Spain**³ (7,7%) and the **Netherlands** (5,3%).

■ In Greece, the share of the organic goat livestock was 14.5% in 2020. In 2019, it was 10.0% in France and in the Netherlands, 9.4% in Italy and 3.0% in Spain.

■ The Netherlands produced 36,320 tons of goat milk in 2019.



1- Whereas for all British organic products the exported share was 9%.

2- While it is the world's leading exporter of conventional dairy products, ahead of Germany, New Zealand and France.

3- Andalusia is the main region for organic farming in Spain.



Italy produced 21,975 tons of organic goat milk in 2015. The main Italian regions of organic goat milk production are the mountain areas of the Centre, the South and Sardinia. In Italy, most of the processing takes place on the farms and most of the milk is used to make yogurt. Italy does not export organic goat milk because the quantities produced is not big enough to meet national demand. Italy imports organic milk from Austria and products made from organic goat milk from Austria and France.

In France, organic goat milk collect amounted to 14,324 tons in 2019, i.e. 2.9% of national goat milk collect. The production of organic goat cheese made significant progress in 2020 compared to 2019: an increase of 23.0% for fresh cheeses and 35.6% for other cheeses.

Spain produced 12,376 tons of organic goat milk in 2019 and 14,445 tons in 2020. Spanish organic production has grown significantly since 2010. Andalusia is the main production region (52% of production in 2019).

- In Germany, a significant share of goat cheeses purchases is organic: 10.8% in 2018 (fresh cheeses: 8.4%, soft: 6.7% and pressed: 16.6%).
- In France, purchases of organic goat cheese (excluding fresh) by households increased by 32.2% in volume in 2020 compared to 2019.

Organic sheep's milk: mainly produced in France

- Almost 40,900 tons of organic sheep milk were produced in the EU in 2020 (+9.1% compared to 2019). 77% of production was in **France** and 14% in **Spain**.
- In France, organic sheep milk collect increased by 4.9% between 2019 and 2020. It represented 10.3% of the national collection of sheep milk in 2020. A cooperative dedicated to organic sheep milk was created in Occitanie in 2020: *Aveyron Brebis Bio*. The production of organic fresh cheeses made from sheep's milk increased by 5.0% in 2020 compared to 2019. Those of other organic cheeses made from sheep's milk increased by 3.2% and those of milk yogurts 7.5% organic sheep.
- In Spain, organic sheep milk collect increased by 67% in 2020. Andalusia is the main production region (67% in 2019).
- In France, purchases of organic sheep cheese (excluding fresh) by households increased by 5.9% in volume in 2020 compared to 2019.

Market for organic baby products: popular products in many countries

- Infant formulas consume a lot of whey protein, which is a by-product of cheese making and is still limited in availability¹.
- The organic baby products market is growing rapidly. This category often represents a significant share of EU organic markets (e.g., 10% in the UK). Infant products are even the main category of organic products sold in Bulgaria. A significant share of infant food is purchased

¹ - Whey protein can be extracted directly from milk, but the markets for the by-products of this process are underdeveloped - notably organic casein - and as such this route to additional whey supplies is not profitable.



organically in a number of countries in 2020: almost all in Denmark, more than half in the United Kingdom, more than 40% in Germany, 24% in Finland. Even in Lithuania, where the organic market is still underdeveloped, organic products dominate sales of baby food products in several mass distribution chains.

In a context where the baby food market is stagnating while it is growing in organic, an increasing number of companies are creating an organic range or diversifying their offers.

In Lithuania, sales of organic baby products increased by 67% in 2018 and in the Netherlands, they grew up 19%. Organic baby foods are increasingly present in Dutch retailers and occupy better locations than before in supermarkets.

Organic beef, mutton and pork meats: productions in development

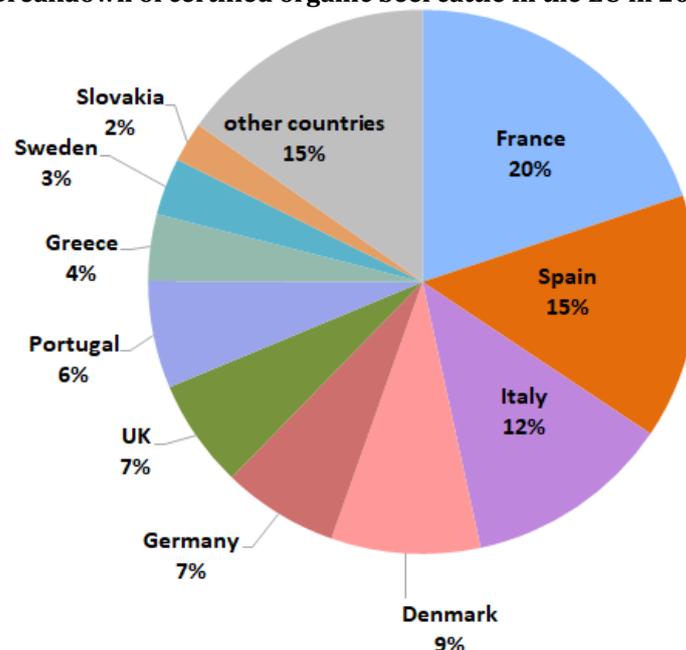
■ Organic cattle raised for meat:

More than 4.8 billion of cattle (dairy and meat) were certified organic in the EU in 2019, i.e. +4,5% compared to 2018. 5.5% of the EU cattle livestock was certified organic in 2019.

In 2019, a few countries stood out for their certified organic share of cattle livestock: Latvia (25.1%), Sweden (23.0%), Austria (22.1%), Estonia (19.2%) and the Republic Czech (19.2%). The share was significantly lower in countries with a large herd of organic cattle: 4.6% in France in 2019, 3.3% in Spain in 2020 and 6.1% in Italy in 2019.

Almost 1.4 million beef cattle were certified organic in the EU in 2019 (+8.8% compared to 2018). **France** became the leading breeder of organic cattle for slaughter in 2019, with 19.9% of the EU herd, ahead of **Spain** and **Italy**. In 5 years, the French herd has grown by 94% and the Spanish by 26%.

Breakdown of certified organic beef cattle in the EU in 2019



Source: Agence BIO/Many European sources



■ Organic sheep:

More than 5.1 million sheep were certified organic in the EU in 2019, i.e., 5.2% of the sheep livestock. Their number decreased by 11.1% in 2019 compared to 2018.

Greece remained the country with the most organic sheep in 2019, with 24.1% of the EU livestock, ahead of the UK (15.3%) and France (14.4%).

The share of sheep certified organic was especially high in some countries in 2019: Estonia (60.1%), the Czech Republic (41.2%), Latvia (37.8%) and Slovenia (31.9%). In Greece, it was 17.4% in 2020.



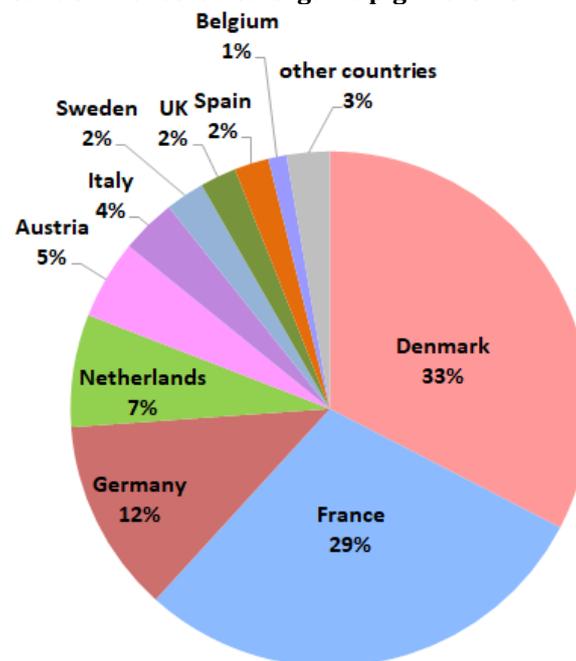
■ Organic pigs:

More than 1.5 million pigs were certified organic in the EU in 2019 (+10.6% compared to 2018), i.e., 1.0% of the EU livestock.

The main countries for organic pigs are **Denmark, France** and **Germany**. They represented almost 74% of the EU organic livestock in 2019.

The share of certified organic pigs was still low in a large number of countries.

Breakdown of certified organic pig in the EU in 2019



Source: Agence BIO/Many European sources

■ Organic meat market in the European Union:

► **Germany** and **France** are the EU leading markets for organic meats. In 2020, sales of organic red meats in Germany increased by 55% in value compared to 2019¹.

The French organic beef market reached € 446 million in 2020 (+11% compared to 2019), those of organic pork meat € 159 million (+11%), those of lamb meat € 79 million (+10%)

¹ They could have been higher if there hadn't been a shortage of organic pork.



and those of cured meats and cured products € 189 million (+6%). The organic meat market share by value was 2.9% in 2019 (including cold meats).

In the Netherlands, sales of organic meats increased by 9% in 2018.

In 2019, 10% of Belgian families bought organic beef at least once.

The market share of organic meat and meat products was still relatively low in most EU markets in recent years. A few countries stood out: Denmark (in large retail: 8.6% for beef and 3.2% for pork in 2018), Austria (in mass distribution: 5.5% for meat including poultry in 2020 and 3.3% for cold cuts), France (beef: 5.6%, lamb: 7.0% and pork: 5.3% in 2019) and Sweden (2.9% in 2017).

► In recent years, Germany has been importing significant quantities of Swedish organic pork meat.

In France, there was only 0.4% imports of organic beef in 2019. Regarding other meat products, the import rate was 4.2% for pork, 2.1% for lamb meat and 26.6% for cold meats. Belgium imports a significant share of its consumption of organic pork.

Organic poultry: a majority of broilers

■ In 2019, the European Union had more than 56.7 million certified organic poultry (+9.5% compared to 2018).

■ In 2019, the livestock of certified organic broilers in the European Union exceeded 27.3 million heads (+8.8% compared to 2018). **France** ranked first in the EU, with nearly 14.2 million head in 2019, more than half of the EU organic broilers. It was followed by **Belgium** and **Italy**.

The production of other organic broiler poultry is growing, especially in Denmark, France, Austria and Germany.

■ In general, sales of organic broilers are increasing in the European Union.

The French organic poultry market was valued at € 308 million in 2020 (+9% compared to 2019).

In 2020, German sales of organic poultry increased by 68% in value compared to 2019, while the increase was less than 10% between 2018 and 2019.

The organic chicken market is very dynamic in Denmark (+60% in value in 2017 in large retail and +31% in 2018) and in Italy (+ 13% in mass distribution in 2020).

The market share of organic poultry is still modest in most EU countries. It was 4.8% in value in France in 2019 and 2.9% in Denmark in 2018.

Eggs: more than 6.8 billion organic eggs laid in the EU in 2019

■ More than 26.3 million laying hens were certified organic in the EU in 2019 (+9% compared to 2018). More than 6,8 billion organic eggs were laid in the EU in 2019 (+7% compared to 2018).

France¹ was the leading producer of organic eggs in the European Union, with more than 7.7 million organic certified laying hens in 2019 (+18% compared to 2018), i.e., 29% of the EU

¹ In 2020, France remained the leading producer of eggs in the EU (all production methods included), ahead of Germany, Spain and Italy.



organic livestock. In 2020, its livestock grew by 13.2% compared to 2019, approaching 8.8 million. 18.4% of French laying hens were certified organic in 2020.

Germany raised 4.9 million certified organic laying hens in 2016. In 2018, 11.6% of eggs produced in Germany were organic.

The Netherlands came in third place with almost 3.8 million organic certified laying hens in 2019.

■ Organic eggs sales have been increasing in the EU for several years, especially in the main producing countries. However, they started to drop in France in 2021.



Organic market share is often quite high. This is the case especially in France with 37.2% in 2019 in value and in Denmark with 29.6% in 2019 (mass distribution), but also in Germany (23% in 2019¹), in Austria (22,3% in mass retail in 2020), in Finland (21,0%), in Italy (22% in mass retail in 2020), in Belgium (17,5% in 2019), in Sweden (17,0% in 2019) and in the Netherlands (16,6% in mass retail in 2019)².

Eggs figure prominently among the categories of organic products most purchased by EU consumers (e.g., it is the first organic product bought in Italy).

In France, the organic egg market was valued at € 630 million for 2020 (+14% compared to 2019).

In Germany, organic egg sales increased by 20% in value in 2020 compared to 2019³. According to the 2020 edition of the *Ökobarometer*, 74% of Germans say they buy their eggs exclusively or often organically.

In Italy, eggs remained the main organic product sold in supermarkets with sales reaching almost € 138 million in 2020/2021.

In the Netherlands, sales of organic eggs grew by 18% in 2018, exceeding € 50 million.

■ In Germany, demand remained higher than production as sales of organic eggs continue to grow. In France, 1% of organic eggs sold in 2019 came from abroad.

Organic honey: nearly one million organic hives in 2019

■ In 2019, the EU organic hives number increased by 7,1% compared to 2018, exceeding one million. This represented 9.2% of EU beehives. According to our estimates, their number has approached 1.1 million in 2020

Bulgaria was the country with the most organic hives in 2019 (22% of the total EU number), ahead of **Italy** (18%), **Romania** (15%) and **France** (13%). In 2019, the number of Bulgarian organic hives fell by 3,1% compared to 2018, but it has increased by 1.1% in 2020. In 2018, 35.8% of Bulgarian beehives were organic. In 2020, Bulgaria would have produced nearly 2,300 tons of organic honey. This figure is very likely to be underestimated.

In Italie, the number of organic hives increased by 10,5% in 2019, after a 3.7% drop in 2018.

1- In terms of volume, the organic market share rose from 14.3% in 2019 to 15.4% in 2020.

2- Market shares in value.

3- +8,6% in 2019.



Romanian organic beekeeping has made significant progress in recent years. In 2019, the number of organic beehives increased by 27%. In 2019, Romania produced nearly 5,800 tons of organic honey.



In France, the number of organic beehives remained almost stable in 2019 compared to 2018 but increased by 47% in 2020. In 2020, 20.3% of French beehives were organic. Most organic beehives are in the South of France, in particular in Occitanie and Auvergne-Rhône-Alpes. In 2019, France produced nearly 2,960 tons of organic honey (13.9% of national honey production), an increase of 3.5% compared to 2018. In 2020, French organic honey production even reached 4,354 tons. Lavender honey represented 19% of French organic honey production in 2020.

Bulgarian and Romanian organic honey productions are mainly intended for export. The main destinations for Romanian organic honey are Germany and Northern Europe.

- EU is the world's largest market for organic honey, with Germany and the United Kingdom. In 2014, the German market for organic honey was over 8,000 tons (around 10% of its honey market). Germany imports a lot of organic honey from Mexico and Brazil.

In Italy, sales of organic honey in supermarkets increased by 9.1% in 2020 compared to 2019. In Sweden, organic honey already represented 10% of honey sales in 2009. In 2010, more than 80% of organic honey sold in Sweden was imported.

Even if the production of French organic honey has been progressing for 10 years, it does not meet the demand, which is also growing.

Organic aquaculture: mussels and salmon are the main productions

- In the European Union, legislation on organic aquaculture entered into force in July 2010. Previously, there were only a few national laws and productions under private specifications.

- In 2020, the EU had more than 590 organic aquaculture farms and they produced nearly 86,000 tons of organic aquaculture products.

The five most important EU organic aquaculture producers are **Ireland, Italy, Spain, France** and the **United Kingdom**.

- ▶ More than 36,600 tons of organic mussels were produced in the EU in 2020. The main producing countries are Ireland (7,137 tons in 2017¹), the Netherlands, Italy, Denmark and Spain. Mussels represented nearly half of Spanish organic aquaculture production in 2020. Organic mussels are also produced in Germany and France. A significant share of Irish production is exported. Denmark exports a significant share of its organic mussels production, mainly to Germany, France and Sweden.

- ▶ Organic oyster production is still modest. They are found in France and in Spain.

- ▶ Salmon is the main species of fish produced organically with almost more than 18,000 tons in 2020. The main producers are Ireland and the United Kingdom (Scotland and, to a lesser extent, Northern Ireland).

¹ This represented 44% of Irish mussel production.



In 2020, all Irish farmed salmon was organic, representing 12,870 tons, i.e., a growth of 13.6% compared to 2019, after two years of decline. Almost all of the Irish organic salmon production is exported (in 2018: 90% to the EU¹, 7% to North America, and the Near and Far East (3%)). In 2019, Ireland exported € 110 million worth of organic salmon.

In Northern Ireland there is only one salmon production company²: it is 100% organic and has several breeding sites. It produces around 800 tons of organic salmon per year, sold in Europe as well as in further countries.

- ▶ Trouts³ are the second largest organic fish production in the EU. In 2020, the EU countries produced more than 7,300 tons of organic trout. France⁴ and Italy are the biggest producers. About 6.5% of French rainbow trout production is organic (2,300 tons). Denmark also produces a lot of organic trout.
- ▶ Over 1,900 tons of organic cyprinids were produced in the European Union in 2020. This data is underestimated as Hungary's organic carp production is not known.
- ▶ Other species of fish are produced in the European Union such as sea bass, sea bream, sea bass and sturgeon. Organic shrimps are produced in Italy. Several countries cultivate organic aquatic plants. Spain appears to be the main producer.

■ The organic aquaculture market in the top 5 EU countries (United Kingdom, Germany, France, Spain and Italy) grew by 20% between 2015 and 2019, reaching 46,500 tons (+3% compared to 2018) However, organic only represented 1.3% of the aquaculture products consumed in the EU in 2017.

The top five organic aquaculture markets in the European Union

In tons	United Kingdom	Germany	France	Spain	Italy
2014	14,440	13,000	3,000	2,600	unknown
2017	17,500	15,800	5,000	3,000	2,100
2018	18,200	16,400	5,400	3,000	2,400
2019	18,400	16,600	5,900	3 000	2,600
Development between 2014 and 2019	+28%	+28%	+97%	+15%	Almost stable

Source: EUMOFA/Organic Monitor

1- Foremost among which are France, Poland and Germany.
 2- Glenarm Organic Salmon
 3- Two species: rainbow trout and sea trout
 4- France also produces organic sea bream, sea bass, mussels and oysters.



In the United Kingdom, the fresh organic fish's market in large retailers amounted to € 17 million in 2015. About 2% of the fish consumed in the United Kingdom is organic.

In France, organic aquaculture sales continued to grow strongly in 2020, reaching € 220 million (+7% compared to 2019).

In Spain, the organic fish market share remained below 1% in 2017.

Salmon is the main species consumed organically, followed by trout. Germany and France are the two main markets for Irish organic salmon. In 2017, more than ½ of Irish organic salmon exports were sent to France, while 20% were imported by Germany and the United Kingdom combined. Germany is the first buyer of Danish organic trout.

In Sweden, organic fish had a market share of 12.9% in 2017.

In the Netherlands, the organic aquaculture sales in mass distribution only started in 2009. However, sales of fresh fish had already more than multiplied by twenty between 2009 and 2018, reaching € 8 million¹ for a market share of 1.4%.

In Denmark, sales of organic fish and shellfish more than doubled between 2016 and 2017.

■ The main organic aquaculture imports into the EU are shrimp, tilapia and pangasius (catfish). Organic shrimp imported into the EU comes mainly from Ecuador, Bangladesh, Madagascar, India, Indonesia and Vietnam, while the organic tilapia comes from Central America and the pangasius from Vietnam. These two fishes are generally imported frozen.

¹ - In mass distribution



Willingness to develop the organic sector and public policies

- The European Union has been a pioneer in terms of public support for organic farming. Between 1987 and 1993, many EU countries introduced subsidies for conversion, or even maintenance, on a national or regional basis.
- Currently, the *Common Agricultural Policy* remains one of the major financial support tools for the organic development. However, there are other kinds of public support which are aimed at research, the structuring of supply chains, collective catering or even household consumption.

New organic regulations of the European Union

■ The EU institutions have revised the regulations on organic farming. The new regulations¹ should have come into force on January 1st, 2021. However, the European Commission has postponed its entry into force for one year, to January 1st, 2022, at the request of member states, the European Parliament, third countries and other stakeholders². Too much delay had been taken in finalizing secondary regulations, due to the Covid-19 pandemic. This will also ensure a smooth transition between current and future legislation and ensure that the sector and Member States are fully prepared to apply the new standards.

Since 2019, secondary regulations, i.e., delegated and implementing acts for production, controls and exchanges, have been developed and adopted.

The goal of this revision is to encourage the organic farming development by harmonizing European practices and strengthening the guarantees given to consumers.

The regulatory changes concern production, controls and imports. Regarding production, new products will be able to be certified organic in the EU: cotton, wool, leather and salt.

The use of heterogeneous plant reproductive material will be permitted. Foods containing nanoparticles cannot be certified organic. Derogations allowing the use of biological plant reproductive material and the use of conventional animals will end on December 31, 2035³.

To encourage conversion, holdings producing both conventional and organic food will be allowed, provided that the two agricultural activities are clearly and efficiently separated. Farmers and other operators in the food supply chain will need to apply a range of new measures to avoid contamination by products not allowed in organic production. 4 years after the entry into force of this regulation, the Commission will have to report on the effectiveness of the EU anti-contamination rules and national thresholds and, if necessary, will present a bill to harmonize them.

For controls, operators selling packaged products will be exempt from certification and notification for distribution. Operators selling small quantities of unpackaged organic products could also be exempt. All organic operators can be checked at least once a year in the field. Those for which previous checks have shown no non-compliance in the past 3 years may be checked only every 2 years.

1- N°2018/848

2- e.g., IFOAM

3- A review clause from January 1st, 2028 allows the European Commission to adopt delegated acts on the measures governing the possibility or not of using non-organic seeds, depending on their availability on the market.



With regard to imports, the principle of equivalence will be replaced by conformity. Products imported into the EU must comply with European regulations. Equivalent specifications will only be recognized in the context of bilateral trade agreements or other existing agreements. There is a transition period between the two systems. The EU has given itself 5 years to negotiate such agreements with its partners. The European Commission will be able to grant specific authorizations for the use of products and substances in Third Countries and in the outermost EU regions, taking into account the differences in ecological balance in production, particular climatic conditions, traditions and local conditions. These specific authorizations may be granted for a renewable period of 2 years.

The Green Deal and the Farm to Fork Strategy

- The European *Green Deal*, presented in November 2019, includes a set of legislative measures, political actions and funding mechanisms whose scope extends to the following areas: sustainable energy, circular economy, clean transport, nature and biodiversity, food and agriculture and green finance and industry. Through the *Green Deal*, the European Union has committed to becoming the first carbon neutral continent by 2050.

- The Farm to Fork Strategy was adopted in May 2020. It aims to reduce, by 2030, synthetic pesticides and associated risks by 50%, chemical fertilizers by 20%, by at least 50% the loss of nutrients in nitrogen and phosphorus and 50% the use of antibiotics. Another goal is to achieve 25% of EU agricultural land grown organically by 2030. It is also planned to devote 10% of land to areas of high diversity.

European Union organic action plan

- The *Third action plan for organic farming*¹ was adopted in March 2021². It concerns the period 2021-2027. It takes into account the results of the public consultation organized from September to November 2020³. The main goal is to achieve 25% of the EU agricultural land grown organically by 2030⁴. The action plan is in line with the Green Deal for Europe, the Farm to Fork Strategy and the Biodiversity Strategy.

This new European plan includes 23 actions structured around three axes: encouraging consumption, increasing production and continuing to improve the sector sustainability, in order to ensure balanced growth.

Regarding the encouragement of consumption, the plan includes concrete actions to stimulate demand, preserve consumer confidence and ensure that citizens turn more to organic products. These actions include communicating on organic production, promoting organic products consumption, encouraging greater use of organic products in public canteens through public markets and increasing the distribution of organic products as part of the EU program for schools. The actions also aim, in particular, to prevent fraud, increase consumer confidence and improve the traceability of organic products.

The CAP will remain an essential tool to support conversion. Other main tools include the organization of information events and networking for the sharing of best practices,

1- It can be download here: https://ec.europa.eu/info/sites/info/files/food-farming-fisheries/farming/documents/com2021_141_act_organic-action-plan_en.pdf

2- The second action plan concerned the period 2014-2020

3- This elicited a total of 840 responses from stakeholders and citizens.

4- 8,5 % late 2019



certification for farmer groups, research and innovation, the use of blockchain and other technologies to improve traceability and increase market transparency, strengthening local and small-scale processing, supporting food chain organization and improving animal feeding. In order to raise awareness of organic production, the *European Commission* will organize a European Organic Day every year on 23 September and will award organic prizes to recognize excellence at all stages of the organic food chain. The *European Commission* will also encourage the development of organic tourism networks through biodistricts.

Besides, to further improve the performance of organic farming in terms of sustainability, actions will be taken to improve animal welfare, to guarantee the availability of organic seeds and to reduce the carbon footprint of the sector and the use of plastics, water and energy.

Besides, Member States will be encouraged to promote the development of organic aquaculture.

The *European Commission* also intends to increase the share of research and innovation and devote at least 30% of the budget intended for research and innovation actions in the field of agriculture, forestry and in rural areas to themes specific to the organic sector. The *European Commission* will closely monitor progress through annual monitoring with representatives of the *European Parliament*, Member States and stakeholders, on the basis of semi-annual progress reports and a mid-term review.



Common Agricultural Policy

■ The current *Common Agricultural Policy*¹ (2014-2020) recognizes the role played by organic farming to meet the demand of consumers who wish more environmentally friendly farming practices. Most EU countries have implemented conversion or maintenance subsidies. Denmark and Austria were the first in the 1980s to offer this kind of support. After organic farming was legally defined at EU level in 1991, payments to organic farmers for conversion to organic farming or maintenance, became widespread in the various rural development plans². Currently, only the Netherlands do not provide subsidy. The duration and amount of conversion subsidies varies from one country to another. These subsidies last between 2 and 5 years³.



Eligibility conditions and requirements also vary considerably. Typically, the lowest payments are for grassland, followed by arable land. Perennial crops, including orchards, generally receive the highest level of subsidies per hectare, apart from greenhouse crops, which benefit from exceptionally high support rates in a few countries. The amount of subsidy is higher in Belgium, Cyprus, Germany, some Italian regions and Slovenia. The lowest is in Czech Republic, Latvia, Poland and Slovakia. The amount of

maintenance subsidy also varies. It is highest in Italy, Cyprus and Germany, while it is the lowest in the UK, Latvia and Poland.

1- Since the 1960s, the CAP has been the main support mechanism for EU farmers.

2- In France, there has been another aid since 2006: the tax credit.

3- 5 years in France and part of Italy and Spain.



■ In June 2018, the *European Commission* launched its proposal for a common agricultural policy. However, the European Union then decided to postpone its reform of the *Common Agricultural Policy* for two years. The next *CAP* period will therefore cover 2023 to 2027. The *CAP* is an important instrument for achieving the goals set by the *Green Deal* and the *Farm to Fork Strategy*.

Green programs can be put in place to promote organic farming.
Each member state draws up a strategic plan.

National or regional development programs

■ The *European Commission* encourages Member States to draw up national action plans for organic farming to increase their national organic share. However, it cannot force them to set quantified goals. The implementation of the national plans is expected to start in 2022.

■ Three countries have not yet had a public development program specific to organic farming: Cyprus, Greece and Slovakia¹. For other countries, there is no current or planned program: Latvia, Malta and Slovenia².

■ In the other countries, national or regional³ programs are implemented, were recently implemented or have been announced:

▶ In **Austria**, a strategy for organic farming is to be developed in 2021⁴. It will be based on the study commissioned from the *FIBL Strengthening organic farming in Austria by 2030*, which was published in March 2021. The goals defined in this study are in particular to allow balanced growth across the whole of the value chain, to develop research on organic agriculture, to structure the sector, to develop new commercial channels, to strengthen processing and to develop the use of organic products in catering. The strategy for organic farming will be integrated into the national strategic plan for the implementation of the new *CAP*.



▶ In **Belgium**, the plans are regional. A new Walloon organic plan for the period 2021-2030 was launched in June 2021. The main goal is to achieve 30% of the UAA in organic production by 2030. This plan relates especially to increase organic production, advise to operators, growth in demand, market monitoring, training, research and innovation and information. The Flemish strategic plan covers the period 2018-2022. The main goal is to develop regional organic production, especially by developing training, advice and cooperation between stakeholders.

1- In Slovakia, however, there is an action plan supported by professionals of the organic sector.

2- Previous programs: Latvia: 2012-2014, Malta: 2004 and Slovenia: 2005-2015.

3- A significant share of the regional programs has been launched under the *SME Organics program of Interreg Europe*.

4- The previous organic program ran from 2015 to 2020. The first development program dates from 2001.



► In **Bulgaria**, the Ministry of Agriculture has prepared a national plan for the development of organic farming until 2027. The goal is to make this country a leader for a number of organic products. The sustainability of small organic farms will be promoted through their cooperation. Free advice and vocational training opportunities for organic farmers are being launched.



► In **Croatia**, the first organic farming development program covered the period 2011-2016. The main goal was to reach 8% of the UAA grown organically by 2016¹. This program aimed to accelerate the development of the sector to meet consumer demand and promote sustainable economic development in rural areas. The planned actions concerned the training and information of organic producers, the structuring of the sector, the promotion, the involvement of food companies in processing, the competitiveness of the sector, tourism and research.

Organic farming was then supported under the 2014-2020 Rural Development Program. The aim was to promote organic farming practices.

► In the **Czech Republic**, the action plan for the development of organic farming for 2016-2020 had for main goals to increase the viability of organic farms and to develop the domestic market (with a significant share of national products).

The new action plan covers the period 2021-2027. Its goals are to achieve 23% of the UAA in organic (and 25% by 2030), an organic market share of 4% in retail sales and 5% in catering.

► In 2015, the **Danish** government² launched a program to double the Danish organic area by 2020 and to increase organic food demand. One of the ambitions of this program was to further develop the quantity of organic products served in public catering to reach a share of 60%.

In June 2019, the new Danish government decided to double the share of areas grown organically, organic exports, as well as the domestic organic market by 2030

In 2018, Denmark received the *Future Policy Award* from the *United Nations* for its effective and innovative policy in favour of organic farming.

It was decided to extend the organic program which was due to end in 2020.

► In **Estonia**, the strategic goals of the Development Plan for Organic Agriculture 2014-2020 were to improve the organic farming competitiveness and develop local organic products consumption. The *Ministry of Rural Affairs* wished that, by 2020, the organic share of UAA will increase by 50% compared to 2014³, that 20% of Estonians consume organic food regularly and that 30% of institutions welcoming children offer organic products in their menus.

A meeting was planned to be held in 2020 to assess the results of this program, but it had to be postponed due to the pandemic. There are no plans for a new strategy yet.

This Ministry has also developed a knowledge transfer program on organic for 2016 to 2019.

1- Not reached.

2- In 1995 Denmark was the first country to develop an action plan for organic farming.

3- The share of UAA in organic was already 16% in 2014.



► In **Finland**, the first organic farming development program covered 2013 to 2020. The ambitions were to develop and diversify production and increase the presence of organic in distribution and in professional kitchens. One of the goals was that the organic share of UAA reach 20% by 2020¹. The *Ministry of Agriculture* is working on the development of a new development program.



The Ostrobothnia regional organic plan ran from 2018 to 2020. The goals were to strengthen the competitiveness of SMEs and the sustainability of the organic sector.

► In **France**, a development program was launched in 2018: *Ambition Bio 2022*. The main goals are to reach 15% of the organic UAA by 2022 and a 20% share of organic products in public catering. The three levers of this program are the strengthening of the resources devoted to conversion subsidies, the doubling of the amount allocated to the Avenir Bio Fund (from € 4 to 8 million) and the extension and revaluation of the 2,500 organic tax credit at € 3,500 until 2020. This action program has seven axes: developing production to reach the 15% of French UAA grown organically by 2022, structuring the sectors, developing consumption and supporting the supply of organic products for all consumers, including the most deprived and most vulnerable, strengthen research, train stakeholders, adapt regulations and develop organic in overseas territories.

As part of the recovery plan, the *Avenir Bio Fund* has been significantly upgraded, with an additional € 5 million for 2021 and 2022.

A plan has been launched in New Aquitaine to improve the competitiveness of organic businesses. It started in mid-2019 and will end late 2022.

► Early 2017, the **German** Minister of Agriculture launched a strategic plan to strengthen organic farming. One of the goals is to reach a share of 20% of the UAA grown organically by 2030. Five actions areas have been identified: designing a coherent legal framework focused on the future, simplifying access to organic farming, improving the performance of organic systems, making full use and increasing the potential demand for organic products and rewarding services appropriately.

There are also organic action plans in several Länder. In 2020, Baden-Württemberg launched an action plan for 2020-2030. The main goals are to facilitate conversion, to reach between 30 and 40% of the UAA grown organically², to meet demand with local organic products (especially in canteens), to develop the use of the regional organic label, to facilitate the transfer of knowledge, to inform consumers more, to structure the regional organic sector more and to strengthen the added value of the organic sector³.

In Bavaria, the plan *BioRegio Bavaria* by 2030 has for main goals to achieve 30% of its UAA grown organically⁴ and to increase organic sales and demand⁵. In order to achieve these goals, the program focuses on the following points: strengthening organic training, financing new storage, use of the Bavarian organic logo, development of sales of regional organic

1- Not reached

2- It was 13,2% in 2019.

3- An evaluation of the implementation of this organic plan will be carried out in 2023 and 2027.

4- It was 11.9% in 2019.

5- The previous plan ended in 2020. Bavaria achieved its goal of doubling the area grown organically between 2010 and 2020.



products, structuring of the regional organic sector, support for the eco-models regions, increased use of regional organic foods in out-of-home catering, conversion of State property to organic farming, establishment of an operational network for practical research in organic farming and communication on organic farming in training for green jobs as well as food and nutrition jobs.

Brandenburg is considering setting up a new organic plan to achieve 20% of the UAA grown organically by 2024¹. It should be launched late 2021. It could concern the development of conversions, the strengthening of training and advice, the structuring of the organic sector and the marketing of organic products.

In the Land of Bremen, there is no organic plan as such, but organic products are favoured in public catering.

The Land of Hamburg has put in place an organic plan which ended in 2020. The main goal was to double organic fruit areas. The conversion and investments in buildings and equipment were favoured. Knowledge transfer has been strengthened. The promotion of regional organic products has been developed in order to increase sales.

In Hesse, there is an organic plan for the period 2020-2025. The goals are especially to develop sales of regional organic products, to reach 25% of the UAA grown organically, to maintain and increase biodiversity, to improve structuring, to develop training and advice and to strengthen the animal wellbeing.

In Lower Saxony, the organic plan by 2025 has for main goals doubling the share of organic farms, developing sales of regional organic products, providing more information, developing links between organic players and strengthening the transfer knowledge, as well as research and training.

The Mecklenburg-Vorpommern organic plan ended in 2020. Its goals were to develop organic farming, to provide information, to develop research and innovation and the links between organic farming and tourism. This Land has achieved its goal of areas development. A new organic plan is in preparation. It will start in 2023.

The organic plan for North Rhine-Westphalia ran until 2020. Its main goals were to develop regional organic production to meet demand, to strengthen links between organic operators and to provide them with more information on the organic market. Late 2020, the Minister of the Environment and Agriculture of the Land announced a goal of 20% of the UAA grown organically by 2030. This should be done by strengthening the structuring of the sector by relying on the creation of eco-model regions. It was planned to create 3 in 2021.

In Rhineland-Palatinate, the second organic plan² was presented in November 2020. It includes a total of 48 measures in four actions areas: strengthening organic farming, training, research and expansion of regional organic sectors. A goal of 20% of UAA grown organically in the medium term has been set. No duration is set. This plan will be updated at regular intervals.

The Saar has set itself the goal of reaching 25% of the UAA grown organically by 2025, but it has not launched an organic plan yet.

Saxony's latest plan for organic farming aimed at promoting regional organic products, strengthening training, research, advice and knowledge transfer and structuring the sector. A new organic plan should be launched in the years to come.

The Saxony-Anhalt organic plan runs from 2018 to 2021. Its goals were the development of agriculture to achieve 20% of the UAA grown organically, the strengthening of vocational

1- 14,4% in 2020.

2- The first organic plan dated from 2018.



training, research and knowledge transfer and the development of regional organic sectors, processing and promotion of regional organic products.

In Thuringia, the last organic action plan was completed in 2020. Its goal was mainly to achieve 10% of the UAA grown organically by 2020. Its ambitions were to develop organic in training, to strengthen the network of organic demonstration farms, improve marketing structures, develop the use of organic products in public canteens and strengthen consumer confidence. The assessment of this plan carried out in 2019 showed that it was necessary to continue to support and advise the organic sector. In spring 2021, the agricultural and environmental administration started working on a new organic plan, involving organic stakeholders. This work should be completed late 2021.

▶ In **Hungary**, an action plan for the organic farming development ran between 2014 and 2020. Its goals were to develop production, processing, training, research, cooperation between actors, consumption, consumer confidence and data collection.

A new organic plan is currently in preparation.

▶ In **Ireland**, the *Ministry of Agriculture* has launched a strategy for the development of the organic sector for the period 2019-2025. The overall goal is to further develop a viable organic food sector to respond to growing domestic and export market opportunities. Targets have been set by sector. They will be reviewed after 5 years. Ireland aims to reach 7.5% of UAA grown organically by 2025.

Ireland has reopened its subsidies program for organic farming. The Irish government hopes to increase the number of organic farmers by 30% by 2021.



▶ In 2016, **Italy** adopted a new organic strategic plan by 2020. It included ten actions concerning support for organic farming, structuring, promotion of Italian organic products, development of the use of organic products in catering sector, green space management, regulations, training, controls, research and innovation. Italy had achieved its goals of increasing organic areas by 50% and the sector turnover by 30% in 2018, so well before the end of its strategic plan.

Lombardy benefited from an organic plan in 2019 and 2020. The main goal was to develop organic employment in the region.

An organic plan has been set up in Puglia for the period 2018-2020. The goals were to strengthen the competitiveness of organic SMEs and the sustainability of the regional organic sector, to create jobs, to promote regional organic products, to improve training and advice and to develop the use of organic products in collective catering.

▶ **Lithuania** is preparing a new development program. Between 2014 and 2020, support for organic farming was integrated into the rural development program. The development of organic areas was one of the goals of this program. Training and research were also supported.

▶ The national action plan for the promotion of organic farming in **Luxembourg**, also called *PAN-Bio 2025*, aims to increase the share of areas under organic farming in Luxembourg to 20%¹ by 2025. This plan was developed in conjunction with associations and national NGOs.

¹ - During the first year of the organic plan, the share of UAA grown organically rose from 4.6% late 2019 to 5.18% late 2020.



It is based on 4 strategic axes: assess the current situation of the organic farming sector in Luxembourg in order to act in a targeted manner, improving the visibility of organic farming among different population groups to boost sales, increase the attractiveness of organic production methods for producers to certify more areas and develop and set up different production, processing and marketing channels in order to increase supply and demand.

► In the **Netherlands**, a development program for the organic sector is being prepared. The last was 10 years ago.

► In **Poland**, the plan for organic agriculture and food covered the period 2015-2020. Its main goals were the development of production and market. The secondary goals were improving competitiveness, developing supply and processing, diversifying and strengthening distribution channels for organic products, increasing consumer awareness, improving the cooperation between actors and the maintenance of a high level of control.

A new national organic plan is being prepared. It could be integrated into the *CAP* strategic plan.

An organic plan has been set up in the Łódzkie region. It focused on strengthening the SMEs competitiveness and the sustainability of the organic sector. It took place in 2019 and 2020.



► In **Portugal**, the National Strategy for Organic Agriculture is running for the period 2017-2027. The three goals are to double the area grown organically and the national processing capacity, to increase the organic consumption and to create an experimentation network. This strategy provides for the introduction of organic in canteens, the creation of a national organic food day, the encouragement of the integration of organic products ranges in wholesale markets, the taking of local and national initiatives of promotion of organic products and the distribution of educational materials on organic farming to schools.

► In **Romania**, an organic plan was set up in the Northwest region from 2014 to 2020. The main goals was to increase the competitiveness of organic SMEs.

► In **Spain**, in 2018, the *Ministry of Agriculture* launched a strategy for organic farming for the period 2018-2020. The four main goals were to promote domestic consumption and improve the marketing of organic products, to contribute to a better structuring of the sector, to support the growth and consolidation of organic production and to study the role of organic in environmental policy and adaptation to climate change

Andalusia launched its third plan in favour of organic farming in 2016. It had the following main goals by 2020: improving competitiveness, developing the domestic market, strengthening controls, growth in knowledge, professionalization of the sector and job creation.

In the community of Valence, a plan to develop organic production was set up from 2016 to 2020. The two goals were to achieve 20% of UAA grown organically by 2020 and 10% of agricultural turnover. The share of UAA grown organically reached 18% in 2020.

The goals of the Navarre government were to reach 10% of the UAA grown organically by 2020 and to develop the organic consumption, including in catering.



In June 2019, Castile-La Mancha launched its organic sector development strategy for 2019-2023. This gives priority to organic producers in all areas of the rural development program. Actions are taken to develop the organic sales in short channels, to further structure the sector, to introduce organic products in public school catering and to develop training and advice.

▶ In **Sweden**, organic farming is integrated into the national food strategy for 2030¹. With regard to the organic sector, the main goals are that, by 2030, 30% of Swedish UAA will be grown organically and that 60% of public food consumption will consist of organic products. The *Swedish Agriculture Council* has been responsible for developing an action plan to achieve these goals, in cooperation with the relevant authorities and consumer and environmental protection organizations. The secondary goals for organic farming are the promotion of organic production, organic consumption and Swedish organic products for export, the strengthening of exchanges of experience between organic actors, the widening of knowledge on organic farming (research, innovation and advice) and a better understanding of the organic market.

▶ In the **United Kingdom**², Scotland has enforced an action plan for the period 2016-2020 to help organic farming build a more sustainable future, regenerate the rural economy and conserve biodiversity and natural resources. This strategy heart is to disseminate knowledge on the economic, environmental and social value of Scottish organic products, to strengthen the entire supply chain, as well as to advance skills through knowledge of best practices and training.

▶ In **Greece** and in **Latvia**, there is no action plan dedicated to organic farming, but this sector was supported under the 2014-2020 Rural Development Program. In Latvia, the actions only concerned organic production.

Organic products promotion

■ The EU countries set up promotion and information actions on organic products.

■ In some cases, these are real promotion programs, sometimes co-financed by the *European Commission*. Co-funded programs can be national or multinational. Member States must respond to a call for tenders to request co-financing of their promotion programs. EU agricultural promotion campaigns are designed to open up new market opportunities for EU farmers and other operators³. The *CHAFEA* executive agency preselects projects and the *European Commission* makes the final choice. For the year 2021, the *European Commission* has planned a specific budget of € 40 million.

Two new programs were selected in 2020: *EUR safe food* by *Naturland* to promote its products in **China** (3 years) and *GRFVD* by *Organic Sweden* and *Ekologiska Lantbrukarna* for organic products in **Sweden** (1 year).

1- This strategy was announced early 2017.

2- Last plans for other states: England: 2002-2007, Wales: 1999-2004 et North Ireland: 2007-2009.

3- In 2020, the *European Commission* allocated € 200.9 million to finance activities to promote EU food products in the EU market and abroad, compared to € 191 million in 2019.



- With regard to non-co-financed information programs, we can cite the example of the **Czech Republic**, which has set up a program to increase the level of knowledge of Czechs on organic products.
- Several countries organize annual campaigns e.g., organic week or organic month, like in **France**, Wallonia in **Belgium**, the **Czech Republic**, the **United Kingdom**, **Sweden** and even Catalonia in **Spain**.
- Late 2020, an international development platform for **Italian** organic agriculture was created by *ICE* and *Federbio: Ita.Bio*. The goal is to consolidate the positioning of the Italian organic food industry on foreign markets, through the identification of Made in Italy organic products, and on e-commerce. The *Ita.Bio* platform has three main functions: monitoring and measurement of the market, support for promotion on international markets and communication. A program of promotional actions abroad is planned, focusing on **China** and the **USA**.

Research support

- The EU and the Member States support organic farming research. It is funded within the framework of national research programs or national action plans for organic farming as well as through EU programs.

Several research projects on organic farming have been funded under the EU framework programs since the mid-1990s. We can cite *OK-Net Arable* (notably to share practical solutions between EU organic farmers via the *Organic-Farmknowledge.org* platform), *OK-Net EcoFeed* (to extend the scope of action of the platform), *LIVESEED* (seeds and organic plant selection) and *RELACS* (alternatives to problematic inputs).

CORE Organic was launched as part of the *European Commission's ERA-NET* program in 2004. It brings together resources in the field of research on organic food and farming. It aims to intensify cooperation in research and to improve the quality, relevance and use of European research sources through coordination and collaboration. Twelve projects are underway within the framework of *CORE Organic*.

In 2019, two projects started: *PPilow* on animal welfare and *Biofruitnet* to reduce diseases and infestations in organic fruit farming by sharing knowledge and practices.

Horizon Europe, the 9th EU framework program for research and innovation covers the period 2021-2027. Organic farming is not forgotten in this program.

Despite the significant investments made by the *European Union*, most of the funds allocated to agricultural research are still managed by the Member States, but they sometimes do so in the form of transnational cooperation, bringing together national budgets.

- An international database has been created under the aegis of *ICROFS: Organic Eprints*. It is the largest international free online archive of organic farming research with more than 20,000 publications from around the world.

- There is also a European technological platform for research in organic farming and food, *TP Organics*, whose main goal is to harness the contribution of the organic sector to sustainable agriculture and food production. It identifies the research needs of the sector and organic farmers, then transmits research priorities to decision-makers. It also informs its members of funding possibilities for research and innovation and promotes the exchange of knowledge



between farmers, businesses and researchers. *TP Organics* organized the first organic innovation days in 2015

- Technical demonstration days have been organized in **France** (*Tech & Bio*) and in **Germany** for several years.

- Since 2013, a day dedicated to science has been organized within the framework of *Biofach*.

- Networks of organic demonstration farms have been created, e.g., in **Germany**.

- In some countries, organic farming is integrated into the research programs of different institutes and universities, e.g., in **Germany**, **Greece** and **Sweden**. In other countries, there are specialized research structures which coordinate all studies on organic farming, such as the *ÖMKI* in **Hungary**. In **France**, the *Technical Institute of Organic Agriculture (ITAB)* coordinates organic research. It also conducts research and experimentation. *INRAE*, which is the main agricultural research institute, is also active in the organic sector. In **Denmark**, *ICROFS* has an intermediate position. It cooperates with different research organizations but is not always the project manager.

- In the wake of the first Organic Action Plan in 1995, the **Danish Ministry of Environment and Food** launched in 1996 the first national research program on organic farming and food. In **Denmark** and the **Netherlands**¹, a research program dedicated to organic farming has been established by consulting the various players in the sector. In 2009, the Dutch government decided to allocate 10% of the total budget for agricultural research to organic farming.

- In **Germany**, the federal support program for organic farming launched in 2001, aims to provide information to the entire supply chain actors and to conduct research and demonstration activities. Since its launch, it has funded more than 900 research projects. It has also organized more than 3,500 knowledge transfer events since 2005. In addition to federal funding, the German Länder also fund biological research².

Recently, two new research projects for the development of organic poultry farming were launched: *Oeko2Huhn* and *RegioHuhn*. The overall goal of these two projects is to find breeds for egg and meat production that are better suited to the peculiarities of organic farming.

A competence centre for applied research has been set up in Saarland. Its work is expected to start in the third quarter of 2021.

- Late 2020, the **Italian Ministry of Agriculture** launched a new call for projects for research in organic farming. A fund of € 4.2 million has been allocated to this call for projects.

- In **France**, *INRAE* launched a metaprogram on organic farming change of scale. This transversal program aims to study the challenges, the levers and this change consequences with the goal of federating scientific communities and to propose scientifically supported answers allowing to anticipate the consequences and support this change of scale. The deployment of this transversal program should encourage the enlargement of the scientific community working on organic farming.

1- In the Netherlands, *Bioconnect* was created by the State in 2005 to develop the research program in organic farming.

2- e.g., Bavaria alone spent € 3.7 million on biological research between 1995 and 2008.



- In 2017, the **Czech Ministry of Agriculture** dedicated 3.4% of its research budget to organic farming (almost € 1.2 million). There is a Czech technological platform for organic farming: *CTPEZ*¹. It was founded in 2009. Its goal is to build and support the development of a knowledge system in the organic farming and food field, with an emphasis on transfer knowledge in all key sectors.
- In **Portugal**, a research and innovation program on organic farming has been launched.
- In 2020, the *Swedish Council of Agriculture* decided to dedicate 3.7 million Swedish kronor (€ 350,000) to finance eight projects aimed at increasing organic agricultural production in **Sweden**. The projects financed relate especially to dairy cows feeding, new breeds of pigs adapted to organic farming, problems of bean root rot and soil health.
- In 2020, the **Flemish** government decided to make a total budget of € 300,000 available to the organic sector for research projects on the following themes: reducing the impact of drought in organic farming systems, stimulating and maintaining natural enemies for pest control and climate change mitigation through ration control in organic ruminants.

Support for training and advice

■ Many training courses in organic farming are available in the EU. In some countries, the state financially supports training programs for organic farmers. **Austria** offers several professional education programs on organic farming. The **Belgian** local development association *CRABE* has been offering training in organic farming since 1984. Thanks to State subsidy, this one-year training is offered free of charge. EU countries are increasingly supporting the organic farming integration into public training. Since late 1980s, **Belgium** has offered organic farming options in agricultural diplomas. In **Austria**, organic farming was integrated very early into the agricultural high schools training program. Governments often provide financial support to develop or improve educational materials on organic farming in high schools². At higher education level, there are organic diplomas or specializations, such as the Bachelor/Master of Science course in organic farming offered by the Organic Agriculture Faculty at *Kassel University* in **Germany**³. The other most famous organic training courses are offered by the *Wageningen University* (**Netherlands**), the *Hohenheim University* (**Germany**), the *Aarhus University* (**Denmark**) and the *Polytechnic University of Marche* (**Italy**). In **Austria**, almost all agricultural universities offer organic farming options. There are some cooperation forms between EU public or private universities in order to offer a common organic curriculum. In these programs, students receive a double degree from two of the participating universities. In **Bulgaria**, the *National Agricultural Plovdiv University* began to invest in the organic sector in 1993 with a pilot farm set up and organic training. In **France**, *Formabio* is the organic farming network for agricultural education. It aims to support agricultural training institutions in the implementation of actions to develop organic

1- *CTPEZ is a member of the European platform TP Organics.*

2- *A large share of agricultural high schools farms are organic.*

3- *In 1981, it was the first German university to create a post of professor specialized in organic farming.*



farming: organic training, organic production on the farms of these schools, innovation and experimentation with partners in the area.

Agricultural associations also offer training in organic farming, e.g., in **Portugal**.

Italy has launched a *Startup Bio* project, a kind of *Erasmus* for farmers, which is funded by the European Union. This 24-month training course is aimed at young people interested in starting a business in organic farming businesses, but also at entrepreneurs who would like to convert to organic.

■ Most EU countries support advice to organic farmers or those wishing to convert their farm¹. In some countries, it is compulsory for the state advisory services to offer services adapted to organic farmers, e.g., in Bavaria (**Germany**). *Chambers of Agriculture* are also often asked to offer advice to organic farmers, as in **France** and **Austria**. Advice to organic farmers can also be provided by organic associations, unions or private organizations that receive a public subsidy: e.g., *Danish Agricultural Advisory Service* (**Denmark**), *FNAB* (**France**), *PRO-BIO* (**Czech Republic**), *SEAE* (**Spain**), *Bio Austria* (**Austria**) and *Bioland* (**Germany**).

In **Germany** and **Denmark**, innovative information systems have been set up for conventional farmers wishing to convert their farm.

The **Danish** resource centre, *SEGES*, disseminates new knowledge from research and development to consultants and makes it applicable in practice by farmers.

The **Estonian Ministry of Rural Affairs** has drawn up a long-term organic knowledge transfer program for the 2016-2019 period. Program activities have been implemented in all counties to reach all producers.

In the **United Kingdom**, a new service, the *Organic Advice, Support and Information Service*, has been launched to help farmers considering conversion to organic farming free of charge and to provide up-to-date information to organic farmers.

Other subsidies to operators

■ EU countries have adopted different approaches to reimburse the certification and inspection costs of organic farmers².

In **Denmark**, organic certification has been provided free of charge to organic operators through a government certification system since 1998.

■ Governments can offer incentives for agricultural investment specifically for organic farming, e.g., in **Germany**³ and **Austria**. They can also offer them as part of a general agricultural investment program that may favour organic farmers. This subsidy can be of different kinds: larger installation subsidy for organic farming⁴, subsidies for agricultural investments and modernization of equipment increased for organic farmers⁵, priority and easy access to loans for agricultural investment with advantageous interest rates. Such loan programs can be



1- Advice services in organic farming can be funded under the measure CAP 2 2014-2020 of rural development measures.

2- Several countries have used measure 132 of the rural development program for 2007-2013 to cover part or all of the certification costs paid by farmers.

3- This is especially the case in the Land of Thuringia.

4- e.g., in some regions of Italy and Spain.

5- In Flanders (Belgium) and in Madeira (Portugal)



carried out through a partnership between government and national banks, the government's role being to guarantee the loan or subsidize the interest.

■ Governments can also reserve incentives for agricultural investment for some "sustainability practices", e.g., investments to improve animal welfare or soil conservation¹. These may benefit organic farmers because such practices are required in organic production.

The **Czech Republic** implemented investment subsidies for organic farming in 1991 and investment loans in 1992.

In **Estonia**, investment grants to improve farm performance are seen as a very important support measure for organic farmers

France set up a sector structuring fund, *Avenir Bio*, in 2008. This fund aims to support partnership approaches on a consistent contractual basis, undertaken over several years, between producer groups and packaging, processing companies or distribution to develop and promote quality in organic production and job creation in the territories. It helps support economic players involved in these initiatives, by reducing the tangible/intangible investments costs made within the framework of action programs. Besides, as projects in favour of organic farming development are multiplying and public funding can no longer ensure full financial support, private, banks and participatory funds must relay public funding. To meet this challenge, Agence BIO has set up a funders club which brings together both public finance players (*FranceAgriMer*, *Water Agencies* and *Regional Councils*), banks and bank support (*SIAGI* and *BPI France*) and the most important crowdfunding players.

In 2016, the **Irish** Minister for Agriculture created a fund of € 5 million to help Irish operators to invest in processing, sorting, packaging and storage facilities for organic products.

In June 2016, the **Dutch** State Secretary for Economic Affairs announced a support measure for the organic sector: the provision of a guarantee to farmers, so that they can obtain bank loans more easily.

Romania has decided to set up investment subsidy for organic farmers.

■ Support for the farms diversification and agritourism can also be implemented for organic holdings². Measures in the actual *CAP* and in the previous one aimed at diversifying the rural economy through subsidies for the introduction or expansion of commercial activities as well as tourist activities.

Some EU countries have recognized the organic farming added value to achieve these goals and have therefore given preference to organic operators, e.g., in the **Czech Republic**.

Another possible approach to link agritourism and organic farming is the *biodistrict/bioregion* concept, as it has been implemented in **Italy**³ and **Austria**. This implies cooperation between local authorities and local private actors. In a biodistrict, restaurants and tourist resorts are encouraged to offer local organic products. Italy currently has around forty biodistricts. Their number is constantly growing. There are three bioregions in Austria⁴. In Austria, the bioregion projects were funded under the EU *LEADER* funding program for rural development. This concept has been replicated in other countries and an international network was created in 2014 with regions in Italy, Austria, France⁵, Spain, Slovakia and Portugal.

1- This is especially the case in Germany.

2- The measures can often fit into budgets other than the agricultural one, e.g., rural development, development of small and medium-sized enterprises or tourism. Projects can also have a municipal or regional scope

3- Le premier biodistrict italien a été créé en 2009.

4- Murau, Mühlviertel and Bio-Heu-Region Trumer Seenland

5- Territoires Bio engagés



■ Countries can also support organic processors. The EU rural development program 2007-2013 made it possible to financially support organic processing and marketing projects through Measure 123 *Valuing agricultural and forestry products*. This is done in many EU countries¹. This makes it possible to develop both production and market (by developing the organic range). This kind of support has in particular contributed to the organic sector development in **Denmark, Italy** and **Czech Republic**. In **Germany**, since 1990, local projects have been supported in order to develop regional marketing networks. Support for processors can take the form of grants to set up or develop processing sites, subsidies to participate in fairs/shows, or the creation of a technical advisory service. Organic projects are often a priority to obtain this kind of financial support. With regard to marketing, governments may decide to support the development of a collective strategy for the marketing of a category of organic products, such as regional organic products, e.g., in Bavaria. Countries can also provide information on the organic markets to allow companies to adapt their strategies.



■ It is also possible to support projects to develop the organic supply chain. This may include structuring a sector or improving traceability. These development projects often incorporate a territorial dimension. A number of organic supply chain development projects have been funded by *LEADER* programs. They encourage the implementation of integrated, high-quality and original strategies for sustainable development and place a strong emphasis on partnership and networks for the exchange of experiences. Some examples of organic projects funded within this framework: a regional marketing project for organic milk in the Saarland (**Germany**), an organic farming development program in **Ireland**, an organic farming and rural eco-development project in Sardinia (**Italy**) and a project to develop a quality organic meat brand in the Bolzano province (**Italy**).

In **Wales**, the EU and local government have supported the development of the Welsh organic market while stimulating innovation at all industry levels².

In **England**, the *Manchester Veg People* project was supported by the government as part of its rural development program. This involved supporting a cooperative supplying fresh organic produce across Greater Manchester by supporting production and marketing. An organic pork project was also funded under the 2007-2013 rural development program

Protection of public spaces and fragile areas

■ Many EU cities have banned the use of chemical pesticides in public spaces. This decision was made either by elected officials or by the city green space manager. The transition often takes several years. Sometimes decisions to ban pesticides are even taken at the district, regional or even state level, e.g., in **France** with the *Energy Transition Law*. Among the major EU towns that no longer use chemical pesticides are the **Danish** capital, Münster and Saarbrücken (**Germany**). Since 2017, pesticides have been banned from **Belgian** public gardens.

1- Currently: **Germany, Belgium (Flanders), Cyprus, Denmark, Spain, Estonia, Finland, Ireland, Italy, Latvia, Lithuania, Netherlands, Czech Republic, Romania and United Kingdom (Scotland)**.

2- *Better Organic Business Links* project which ended in 2015.



Cities can also impose on farmers cultivating the land they lease them to convert it to organic farming, e.g., in **Sweden** and **Italy**.

It is sometimes decided to convert prestigious gardens (public or private) to organic. The most famous are the two Prince Charles estates: *Highgrove Royal Gardens* and *Duchy Home Farm* (organically managed for more than 30 years).

■ The protection of sensitive areas (e.g., water catchment areas, regional parks, urban areas or areas close to schools or hospitals) may require the phytosanitary products prohibition. The public authorities can compel farmers in these areas to convert their holdings to organic farming. Helping farmers in conversion on a water catchment area is generally more cost-effective than incurring costs to clean up water contaminated with inorganic fertilizers and chemical pesticides. In **Germany**, München and Leipzig have made organic farming compulsory in an area to conserve water resources. In **Denmark**, three towns, Aarhus, Aalborg and Egedal, have banned pesticides use on their territory in order to protect drinking water.



In **French** national parks, the ban on the use of phytosanitary products makes it possible to maintain biodiversity. In the **Czech Republic**, a 1992 nature protection law prohibits the use of agricultural chemicals in protected areas and natural parks¹. The **Brussels** region has banned glyphosate use. **Luxembourg** was the first EU country to completely phase out this herbicide. In **Austria**, the *Parliament* passed a partial ban on glyphosate. From December 15, 2021, non-professional use of glyphosate, use in private gardens and in public spaces are prohibited. In agriculture, pre-harvest application will be prohibited if it is intended for human or animal consumption.

Support for the introduction of organic products in catering

■ Support for organic farming can also be done through the organic products use in public catering. It is indeed one of the most effective means of raising awareness about their consumption. Public institutions offer long-term contracts that represent a reliable and stable income source for organic farms. The decision to source organic products can be made at different levels: from the individual canteen to the municipality or the region.

■ In **Sweden** and **Denmark**, ambitious targets for developing the use of organic products in public canteens have been set (60% set by the two countries and even higher shares in several cities).

■ In **France**, the *EGALIM Law* requires that, no later than January 1st, 2022, the meals served in collective catering in all establishments entrusted with a public service mission must contain 50% of quality and sustainable products, of which at least 20% of organic products.

■ In **Italy**, the agreement on the allocation of a € 5 million fund for organic school canteens was ratified in September 2020. It should enable regions to reduce the costs borne by families benefiting from the organic school canteen service and to set up information and promotion

¹ - About 9% of the UAA in the Czech Republic is part of protected areas.



actions in schools for healthy eating. For example, actions to promote organic products to school catering staff and teachers have been organized for three years in Piedmont. Over eleven million meals are served each year in certified organic canteens that meet the requirements of the Italian *Ministry of Agriculture*.

Actions with schools

■ Several countries have implemented specific actions to educate children about organic farming. This can be the installation of organic school gardens, the organization of visits to organic farms for schools, the creation of educational material for students and teachers or the organization of events or competition.

■ In **France**, an educational kit was created in 2009. A competition called *Les Petits Reporters de la Bio* is organized to promote organic products to primary school students. It was launched in 2012.

■ In Emilia-Romagna, in **Italy**, a competition was launched by the Region, in cooperation with the *Ministry of Agriculture* and *Federbio*, with primary schools in 2020. Classes/pupils are asked to submit comics, educational material, drawings, music spots, videos or multimedia pages. About twenty classes and more than 400 pupils participated. Besides, ten organic educational farms welcome classes.



■ In **Spain**, the *Committee for Ecological Agriculture of the Valencian Community* continues to bet on the *Aula Bio* program in Alicante through which nearly a thousand primary school pupils learn the benefits of healthy, ecological and environmentally friendly food. The program has even been adapted so that it can be taught online.

Other actions

■ Many EU countries financially support organizations dedicated to the development of organic farming.

■ In **Germany**, the *Bio Städte* network receives public financial support.

■ The *Organic City Network Europe* was officially launched in Paris in January 2018. It gathers more than eighty cities including Paris, Vienna, Nuremberg and Milan. It offers cities a platform for cooperation on issues such as the future of the *CAP*, regional and local food supply chains, organic public purchasing policies, research and innovation, real food cost, increased supply chains transparency and access to land for new organic farmers.

■ The **Polish** *Council for Organic Agriculture* was created in 2018. It is composed of professionals and is advising the *Ministry of Agriculture*.



- In **Spain**, the Andalusian Association *Vida Sana* has set up a 50-hours course to train the unemployed in cooking organic food. It is accessible to residents of Andalusia, the Canaries, Catalonia and Madrid
The *Spanish Ministry of Agriculture, Fisheries and Food* has commissioned a study on the current reality and the economic, social and labour potential of organic production in the Balearic Islands.
- In **Germany**, Baden-Württemberg has legislated to promote organic gardening among inhabitants. The new law is expected to result in a 40-50% decrease in pesticide use by the end of 2030.
- In 2019, the **Romanian** government adopted a decree to reduce the rate of value added tax from 9% to 5% for organic, traditional and mountain food products¹.
- The **Czech Republic** has launched a restructuring program for organic orchards.
- The *Organic Ecosystem* project aimed at developing the organic sector in six Mediterranean countries (Tunisia, Jordan, Lebanon, **Italy**, **Greece** and **Spain**) was launched at the end of September 2020 in Tunis. It is funded by the European Union and has a budget of € 276,000. Its goals are to reduce brakes to the development of organic farming and to strengthen the competitiveness and integration of medium and small businesses operating in this sector. It aims to create a cross-border food ecosystem that will contribute to the development of the entire Mediterranean organic sector. Innovative value chains will be created. Specialized support will be provided to micro, small and medium companies to improve the quality and marketing of products and their ability to access new markets.

IFOAM Organics Europe

- Created in 1972, *IFOAM Organics International* is an organization that works to bring true sustainability to agriculture around the world.
- *IFOAM Organics Europe* is the European umbrella organization for organic food and farming. It represents organic in the development of European policies and pleads for a transformation of food and agriculture.
IFOAM Organics Europe has nearly 200 members in 34 European countries.
The fields of action of *IFOAM Organics Europe* are organic regulations, rural development, GMO-free agriculture, the fight against climate change, plant health, biodiversity, soil and water health, animal welfare, public food policy, equity and transparency, research and innovation.
- The EU institutions recognize *IFOAM Organics Europe* as the leading advocate for organic food and farming in the European Union.
- The main subjects of this organization for 2021 and the following years include:
 - remuneration of farmers providing public goods,
 - increase in conversion to reach 25% of the UAA grown organically by 2030,
 - continued supply of the EU without GMOs,

¹ - Excluding alcoholic drinks



- sufficient research funding,
- increased support for advisory services,
- strengthening of links between the various organic operators,
- fair remuneration for organic producers,
- highlighting the contribution of organic farming to climate change mitigation and adaptation.

Subsidies in the UK after Brexit?

■ The British government introduced a new legislation which guarantees that agricultural subsidies will continue to be paid to British farmers for 2020.

■ In 2021, the *Ministry of Agriculture* had launch a pilot program of subsidies to farmers linked to measures to preserve the environment (such as soil quality).

■ From 2024, the agriculture bill will provide a new system of support for agriculture, which aims to move away from the structure of direct payments in the EU towards a system where public money is used for public goods, such as improving air and water, improving quality, combating climate change or improving animal welfare.





Conclusions : SWOT analysis of the EU organic sector

		STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Production	Production		Difficulties in obtaining bank loans in lots of countries	Development of the use of plant varieties and animal breeds suitable for organic production	Lack of working-force due to the pandemic
			Lack of availability of high quality organic agricultural inputs in some countries		
			Rising production costs of organic livestock		
	Training		Teaching of organic practices not developed in all countries	Development of accessibility to information available through the Internet	
		Lots of organic training in the EU		Development of organic training	
	Advice	Support structures in many countries	Not sufficiently developed in some countries		
	Certification		Certification costs often too high	Development of certification under PGS	
	Incomes	Increase in income		Fight against poverty	
				Development of fair trade in organic sectors	
				Development of direct sales	
	Structuration	Organic sector not sufficiently organized in many countries		Development of contractualisation	



		STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Processing	Processing		Few processing tools in some countries	Development of processing tools	
	Distribution	Distribution channels			Diversification of distribution channels
				Innovations in the distribution of organic products	
				Evolution of food distribution in many countries	
Large retail		Development of the organic range			Price war
Organic shops			Weakening in some countries	New concepts	
Online		More organic products online, in proportion, than in physical stores.		Development beneficial to that of the organic market and its democratization	
Canteens and restaurants		Allow to promote organic products to young people	Loss of sales with the closure of restaurants and canteens		Catering with organic reserved for the richest in some countries
					Restaurant bankruptcies due to pandemic closures
Exchanges		Trade hampered by the pandemic			



		STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Consumption	Perception of organic products	Good image	Image of an expensive, even luxurious product	Development of the promotion of organic products	
			Poor knowledge of organic products and organic farming in some countries	Explaining more why organic products are more expensive	
				New EU Action Plan	
				Communicate more about the preservation of biodiversity	
	Demand			Demand not fully satisfied	Economic crisis linked to the pandemic Economic crisis linked to the pandemic
			More developed in cities	New EU Action Plan	Rythmes de croissance différents pour offre et demande
	Demographic developments			Strong interest of the younger generations (Y and Z) for organic products	
	Behavioural changes			Wish to buy healthy products accentuated by the pandemic	
				Growth of the food safety criterion	
				Environmental protection: growing choice criterion	
				Growing desire to cook for a part of the population	



		STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
Consumption				Wish to buy more local products	
				Wish to reduce waste (packaging and food)	
Political support	General	Benefits of organic products increasingly recognized by public authorities			
	Operators	Help conversion	Still insufficient in some countries	Diversification of support	
				Current or forthcoming sector support programs in many countries	
	Consumers	Promotion and education on organic products		Multiplication of communication tools	
	Research			Development of political support	
Organic organizations		Many NGOs and associations involved in the organic sector	Lack of coordination in some countries		



Glossary

AMAP: Associations for the Preservation of Smallholdings. This is a French concept of subscription to baskets.

Avenir Bio Funds: French funds dedicated to the structuring of the organic sectors. It was created in 2008. It is managed by Agence BIO.

Barometer Agence BIO/Spirit Insight: It is based on an online quantitative study via the Spirit Insight panel, with a representative national sample of French people aged eighteen and over, constituted according to the quota method.

Bio C'Bon: French organic chain. It was bought by Carrefour in 2020.

Biodistrict: In a biodistrict, restaurants and tourist resorts are encouraged to offer local organic products. In the National Plan for Organic Agriculture adopted in 2014, the Ministry of Agriculture recognized the Biodistrict as an important tool for the development of the organic sector. The first biodistrict, Cilento, was created in Calabria in 2011. Liguria has a regional law on biodistricts: among other measures, the districts receive financial support for the promotion of tourism, payments to support farmers are increased and the use of pesticides in public places is prohibited.

Blockchain: It is a technology that allows information to be stored and transmitted transparently, securely and without a central control body.

Canteens in Italy: This word designates all of the school catering institutions belonging to the same public authority.

CHAFEA: Consumers, Health, Agriculture and Food Executive Agency. It is an EU agency.

Cyprinidae: This family of fish includes carp, gudgeon, minnows and associates (including barbs and barbel).

Drive: This word generally designates a point of withdrawal of goods where the customer takes delivery of his articles directly within or near his vehicle. First used for buying from fast food without leaving your car, it has also been used for a few years to designate the withdrawal points offered by retail chains which allow the delivery of items to the car. In this case, the order is placed beforehand on the brand website or from a mobile application on a smartphone and the customer chooses a time slot to pick up their purchases.



EGALIM Law: French law for the balance of trade relations in the agricultural sector and healthy, sustainable and accessible food for all, promulgated on November 1st, 2018. The organic production method is especially highlighted by the law which sets a target of 20% of organic products in collective catering extended to private collective catering with the exception of restaurants of private companies: "By January 1st, 2022, a share at least equal, in value, to 20% of organic products or from a farm in conversion will be included in meals served in collective restaurants." This goal applies to establishments managed by legal persons of public or private law, as soon as they are in charge of a public service mission.

EKI: Estonian Institute for Economic Research

Energy Transition Law: In France, in 2015, following the example of the cities of Versailles and Strasbourg which abandoned the use of chemical pesticides in the 2000s, France adopted an energy transition law prohibiting public bodies to use chemical pesticides in the management of their non-agricultural land, such as green spaces, parks, forests and access roads open to the public. The ban is part of a broader reform to end the use of all non-agricultural pesticides by 2022, except railways, roads and airports. The law requires that, from January 1st, 2017, public entities that own public or private land stop using phytosanitary products, with the exception of substances authorized in organic farming. The law provides an exception with regard to the processing necessary for the control of bodies considered to be a public threat. In 2016, more than 5,000 French municipalities were already engaged in steps to reduce or eliminate chemical pesticides. In parallel, the law provides, from 2019, a general ban on the sale, use or storage of chemical pesticides for non-agricultural use. This applies to all private individuals, which means that gardeners are no longer allowed to use chemical pesticides in their gardens and other private property.

European Union: It has 28 countries in this report because the UK was still in the EU in 2019.

Federbio: National Federation of Organic and Biodynamic Agriculture (Italy)

Fromage Halloumi: Cypriot cheese. Initially produced from sheep's milk, goat's milk and mint leaves, some producers add cow's milk to it. This cheese is distinguished from other cheeses by its texture. Rather elastic, it is one of the few cheeses that does not melt when cooked.

Generation Y: Also called *Millennials*, it gathers people born between 1981 and 2000.

Generation Z: Also called New Silent Generation or Generation C for Communication, Collaboration, Connection and Creativity, it starts from the early 2000s until today. This generation has always known a world with a large presence of computers and the Internet.

German working group on the organic market : Its members are AMI, Biovista, BÖLW, GfK, Universities of Kassel and Weihenstephan-Triesdorf, Klaus Braun Kommunikationsberatung and Nielsen. It is based on data from GfK, Nielsen, BioVista and Kommunikationsberatung Klaus Braun.

Harju County: Region in the North of Estonia.

ICE: Agency for the promotion abroad and internationalization of Italian companies



ICROFS: Formerly DARCOF. It was created by the Danish Ministry of Food in 1996. In 2008, it became international and changed its name to ICROFS.

Imports: This word is used broadly in this document, i.e., it also includes trade between State Members of the European Union.

Measure 123 of the EU rural development program 2007-2013 "Valuing agricultural and forestry products": It provided support for investments which improve the overall performance of a company for the processing and/or marketing of agricultural products as well as the development of new products, processes and technologies. This was done in the form of a grant for eligible investment costs. The target groups were very small and medium-sized enterprises and companies with less than 750 employees or whose turnover was less than € 200 million. For the 2014-2020 period, this type of support continued under 2 other measures (4 and 8). In addition to EU funds, some countries have allocated an additional national budget to finance support measures for the processing and marketing of organic products, e.g., in Denmark.

Milan Pact: International agreement promoted by the FAO by which the participating cities commit to developing sustainable, fair and healthy food models. Currently, 197 cities have signed this pact.

Milk quota system: This was a policy of rights to produce implemented in France, then in the EU, within the framework of the CAP, from 1984 to limit and stabilize milk production (milk from cow) which was then strongly in surplus, in order to counter the collapse of the price. Each year a milk production limit was set by Member State. This was then distributed among producers according to an organization specific to each country. This system was abolished in April 2015.

National University of Plovdiv: University of Bulgaria. It was a pioneer and is a major contributor to the development of organic farming in the country, with a group of university professors who created the first association for organic farming.

Ökobarometer: German Organic Barometer. It has been carried out since 2002 on behalf of the Federal Ministry of Food and Agriculture. The 2020 edition was produced by INFAS.

ÖMKI: This organization was created by the FIBL in 2011. In 2013, it was recognized as an external department of the Debrecen University.

OMSCO: British Organic Milk Suppliers Cooperative

Ostrobotnia: Region in the South-East of Finland. It is called Pohjanmaa in Finnish.

Paris 2015-2020 Sustainable Food Plan: It was adopted in 2015. In connection with the Paris Climate Energy Plan, the goal, by 2020, is to offer 50% sustainable food in municipal and departmental collective catering. Three indicators are associated to this goal. They are measuring the introduction of organic products, local seasonal products and products labelled Label Rouge/Marine Stewardship Council/sustainable fishing. Thirty million meals are served per year in the 1,200 collective restaurants of Paris (nurseries, schools, child protection institutions, junior high schools, high schools, municipal staff canteens, retirement homes...).



Perennial crops: Also called permanent crops. They stay in place for at least two consecutive years.

Public collective catering: It includes nurseries, canteens of schools, junior high schools and high schools, universities, hospitals, government buildings, prisons and armies.

Reformhaus: This is a kind of business inspired by the principles of the Lebensreform. Present mainly in Austria and Germany, they offer natural drugstore and food items, often organic. However, they have a more limited choice of foodstuffs and a larger offer of food supplements and herbal remedies.

REKO: This concept is inspired by that of *AMAP*. It started in 2013 in Finland and then spread to other countries like Sweden and Norway. Local producers use Facebook groups to advertise which products are for sale and consumers can then order directly on Facebook. The goal is to free yourself from sales intermediaries while creating an efficient delivery system through which producers and consumers can meet. Consumers pay for their order directly at the place of delivery, generally in the city centre to be convenient to access. Delivery points are chosen strategically so that there are no rental costs. Some supermarkets even offer to host a *REKO* for free to attract more customers. The products are seasonal, locally produced and sold at reduced prices because there are no costs for packaging, transport, advertising or sales intermediaries. Contact with consumers allows producers to get feedback on products and their methods. There is no waste for the producer because only the products ordered are harvested.

Retailer brands: Also called private labels. They are popular with consumers because they generally have lower prices than other brands. They also allow distributors to collect more margin. According to LSA, private labels allow you to differentiate yourself, to convey the values of the brand, to build customer loyalty and to have an accessible offer.

Still wine: This is a wine that does not form bubbles when the bottle is opened. It is the opposite of sparkling wine.

Supermarkets in Germany: Their sales area is above 100 m².

SME Organics: This is a project supported by *Interreg Europe*. The overall goal of *SME ORGANICS* is to improve policies and programs within the framework of the Investment for growth and employment goal in order to improve the competitiveness and sustainability of SMEs in the organic sector in 7 EU regions: Ostrobothnia in Finland, Nouvelle-Aquitaine in France, Lombardy and Puglia in Italy, North-West in Romania, North-West in Romania, Łódzkie in Poland, as well as the canton of Aargau in Switzerland.

Territoires Bio engagés: Territories organically involved. This is an initiative of Nouvelle-Aquitaine. This label is reserved for local authorities and their catering institutions having achieved the organic goals of the Grenelle Environment Forum and the National Ambition Bio Plan, i.e., 8.5% of the UAA must be grown organically or that the catering services offer at least 20% organic products.

Third country/ies: Country/ies outside the European Union



TP Organics: It is one of the 40 European technological platforms officially recognized by the European Commission. This was created by IFOAM EU in 2008 and was officially recognized in 2013.

TRACES: TRAdE Control and Expert System. Online management tool from the European Commission which centralizes all health requirements and tracks the movements of animals and embryos, as well as foodstuffs, marketed or imported into the European Union.

UAA: The Utilised Agricultural Area is a statistical concept intended to assess the area devoted to agricultural production. It is made up of arable land (field crops, market gardening, artificial meadows, fallow land, etc.), areas still in grass (permanent meadows, mountain pastures) and perennial crops (vines, orchards, etc.). It does not include woods and forests.

Võru County: Region in the south-eastern part of Estonia.

Wheat Group: Common wheat, durum wheat and spelled.



Sources

- Information on organic production and markets in the EU comes from multiple sources.

A

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B

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C

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D

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E

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G

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H

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I

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J

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K

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L

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N

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O

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P

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R

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S

SANA, Scottish Government, Scottish Organic Producers Association, SEAESINAB, Sirius Insight/Apsia, SKAL, Slovenia Times, Soil Association, 60 Millions de Consommateurs, SSP, STATEC, Statistical Office of the Republic of Slovenia, Statistics Lithuania, Statistics Sweden, Spirit Insight, Steps to Organic, Studentenwerke of Bremen and Münster, SudVinBio, Steps to organic, Svensk Mjölök and Swedish Dairy Association.

T

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U

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V

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W

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X

Xerfi Precepta

Y

YouGov

Z

Zepros and ZMP



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