JOIN OUR SESSION

Global Organic Market Overview

18 Feb // Thursday
14:00 - 15:30
Louise Luttikholt
Executive Director
// IFOAM - Organics International

Global Organic Market Overview
THURSDAY, FEB 18 // 14:00 - 15:30
Alexis Carey
International Trade Manager
// Organic Trade Association (OTA)

Global Organic Market Overview
THURSDAY, FEB 18 // 14:00 - 15:30
U.S. MARKET OVERVIEW
Trends, COVID Implications, Political Landscape

PRESENTED BY
ALEXIS CAREY
INTERNATIONAL TRADE MANAGER
ORGANIC TRADE ASSOCIATION
Our members include growers, shippers, processors, certifiers, farmers' associations, distributors, importers, exporters, consultants, retailers and more.

Our mission is to PROMOTE + PROTECT ORGANIC with a unifying voice that serves and engages its diverse members from farm to marketplace.
U.S. Organic Food Sales & Growth, 2010–2019

Trading Partners

Top U.S. Export Markets
- Canada
- Mexico
- Japan
- South Korea
- Taiwan
- U.K. and E.U.

Top U.S. Import Markets
- Mexico
- Peru
- Argentina
- Spain
- Brazil
- Colombia
U.S. Organic Equivalence Agreements

- Canada
- European Union
- Japan
- South Korea
- Switzerland
- Taiwan
- United Kingdom
COVID Impact on Consumption Patterns – Organic Sales
Questions to consider about the future

Will former dietary trends return? When?

When will concerns about excessive packaging overtake concerns about virus contamination?

Retail trends – will they return to closer to previous, or will online habits stick?
U.S. Political Landscape

New Administration

- New appointments at USDA
- Climate focus
- Anticipated progress on standards
- New approach on Farm to Fork?
Our Policy Priorities

- Elevating Organic as a climate change solution
- Reforms to the U.S. immigration system that support a stable agricultural workforce
- COVID-19 recovery efforts that give tools to organic farmers and businesses to succeed while ensuring the safety and protection of their workforce
- Regulatory certainty, continuous improvement, and advancement of organic standards
- A future farm bill that grows and protects organic agriculture
THANK YOU
Alexis Carey
acarey@ota.com
Helga Willer
Department of Extension, Training and Communication - FiBL - Forschungsinstitut für biologischen Landbau

Global Organic Market Overview
THURSDAY, FEB 18 // 14:00 - 15:30
Organic Agriculture in Europe: Current Statistics

Jan Trávníček, Diana Schaack and Helga Willer

The Global Market for Organic Food

BioFACH Congress eSPECIAL, February 18, 2 PM
The 22nd edition of 'The World of Organic Agriculture', was published by FiBL and IFOAM – Organics International in February 2021.

- Data tables and graphs
- Country and continent reports
- Markets, standards, policy support

www.organic-world.net
Another record year for organic in Europe and the European Union – Key indicators 2019

• Organic farmland: **16.5 million hectares** (European Union 14.6 million hectares)
• Organic farmland growth: **6 percent**
• Organic farmland share: **3.3 percent** (European Union 8.1 percent)
• Organic retail sales: **45 billion euros** (European Union: 41.4 billion euros)
• Organic retail sales growth: **8 percent**
The ten countries with the largest areas of organic agricultural land 2019

Source: FiBL survey 2021

<table>
<thead>
<tr>
<th>Country</th>
<th>Million hectares</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>35.69</td>
</tr>
<tr>
<td>Argentina</td>
<td>2.35</td>
</tr>
<tr>
<td>Germany</td>
<td>2.33</td>
</tr>
<tr>
<td>India</td>
<td>2.30</td>
</tr>
<tr>
<td>France</td>
<td>2.24</td>
</tr>
<tr>
<td>China</td>
<td>2.22</td>
</tr>
<tr>
<td>Uruguay</td>
<td>2.14</td>
</tr>
<tr>
<td>Italy</td>
<td>1.99</td>
</tr>
<tr>
<td>Germany</td>
<td>1.61</td>
</tr>
</tbody>
</table>

The ten countries with the most organic agricultural land 2019

(Organization logos)
The countries with the highest shares of organic farmland shares

The countries with an organic share of at least 10 percent of the agricultural land 2019

Source: FiBL survey 2021
Growth of the organic agricultural land by continent 2012-2019

Source: FiBL-IFOAM survey 2012-2021
Evolution of the French organic production

Source: Agence Bio/Control bodies 2020

Certified area (ha)

- Area under conversion
- Converted areas
- Number of producers
- Number of other operators

2,29 millions ha

2019
8.5% of French UAA

2020, the dynamic of engagement is sustained
EU: Land use 2004-2019

European Union: Growth area by land use type 2004-2019
Source: FiBL-AMI surveys 2006-2021

- Permanent grassland
- Permanent crops
- Arable crops
EU: Growth of organic area and retail sales

EU: Growth of organic area and retail sales
2000-2019
Source: FiBL-AMI surveys 2009-2021

Cumulative growth in %

Organic Area
Organic retail sales
The biggest organic markets worldwide (Yellow: Europe)

The ten countries with the largest markets for organic food 2019
Source: FiBL-AMI survey 2021

<table>
<thead>
<tr>
<th>Country</th>
<th>Retail sales in million euros</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States of America</td>
<td>44,721</td>
</tr>
<tr>
<td>Germany</td>
<td>11,970</td>
</tr>
<tr>
<td>France</td>
<td>11,295</td>
</tr>
<tr>
<td>China</td>
<td>8,504</td>
</tr>
<tr>
<td>Italy</td>
<td>3,625</td>
</tr>
<tr>
<td>Canada</td>
<td>3,480</td>
</tr>
<tr>
<td>Switzerland</td>
<td>2,912</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>2,679</td>
</tr>
<tr>
<td>Sweden</td>
<td>2,144</td>
</tr>
<tr>
<td>Spain</td>
<td>2,133</td>
</tr>
</tbody>
</table>

The biggest organic markets worldwide (Yellow: Europe)

Source: FiBL-AMI survey 2021

North America 45%
Europe 43%
Asia 10%
Others 2%
Europe and European Union: Development of retail sales  2000-2019

Europe: The countries with the highest growth of the organic market 2019
Source: FiBL-AMI survey 2021

Market growth in %

Market growth

<table>
<thead>
<tr>
<th>Country</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>6.7%</td>
<td>13.4%</td>
</tr>
<tr>
<td>Estonia</td>
<td></td>
<td>13.2%</td>
</tr>
<tr>
<td>Belgium</td>
<td></td>
<td>11.7%</td>
</tr>
<tr>
<td>Denmark</td>
<td></td>
<td>9.7%</td>
</tr>
<tr>
<td>Germany</td>
<td></td>
<td>9.7%</td>
</tr>
<tr>
<td>Finland</td>
<td></td>
<td>9.5%</td>
</tr>
<tr>
<td>Austria</td>
<td></td>
<td>6.1%</td>
</tr>
<tr>
<td>Switzerland</td>
<td></td>
<td>5.6%</td>
</tr>
<tr>
<td>UK</td>
<td></td>
<td>4.8%</td>
</tr>
<tr>
<td>Norway</td>
<td></td>
<td>4.5%</td>
</tr>
</tbody>
</table>

22.3%
Europe: The ten countries with the highest organic market shares

Europe: The countries with the highest organic shares of the total market 2018 and 2019
Source: FiBL-AMI survey 2021

- **Denmark** 🇩🇰: 12.1% (2019) vs 11.5% (2018)
- **Switzerland** 🇨🇭: 10.4% (2019) vs 9.4% (2018)
- **Austria** 🇦🇹: 9.9% (2019) vs 9.3% (2018)
- **Sweden** 🇸🇪: 9.0% (2019) vs 9.3% (2018)
- **Luxembourg** 🇱🇺: 8.6% (2019) vs 8.3% (2018)
- **France** 🇫🇷: 8.1% (2019) vs 6.1% (2018)
- **Germany** 🇩🇪: 5.7% (2019) vs 4.8% (2018)
- **Netherlands** 🇳🇱: 4.9% (2019) vs 3.7% (2018)
- **Italy** 🇮🇹: 3.7% (2019) vs 3.2% (2018)
- **Estonia** 🇪🇪: 3.4% (2019) vs 3.7% (2018)

**Market share in %**

Note: Figures are approximate and may vary slightly.
European Union: Development of organic retail sales by channel for selected countries 2017-2019
Key trends and developments: COVID 19

• The COVID-19 pandemic has had a tremendous impact on most people’s purchasing behaviour and thus has given the organic market an unprecedented upturn in many countries.

• **Health, environment and climate change** have become big issues.

• **Online-sales** such as subscription boxes for organic have grown tremendously and other forms of contactless shopping such as ‘Click and Collect’.

• Most experts see at least a **similar sales level**, as people’s awareness of organic and environmental and health issues will remain.

• On the agricultural side: with the growing market **organic production and processing need grow at the same level** as the market.

The European Union’s Farm to Fork-strategy can support this development with several measures.
Any effect of the health crisis?

- Organic as a refuge (eggs, fruits & vegetables)
- Limited supplies in conventional (flour)
- Local buying as organic is especially embodied in direct selling in France (fruits & vegetables)

But

- Organic market did not recruit “new” consumers (61% were already buyers),
- Back to their usual consuming habits

67% have confidence looking for reinsurance “local” and Fairtrade? consistency of the story behind the product?
22 % more organic sales, nearly 15 billion EUR

Organic food sales in Germany, in billion EUR excl. Catering

Insgesamt

Other sales channels
Bakeries, butchers, fruit & vegetable shops, farmer’s markets, small farm shops, Online shops, health food shops, petrol stations

Natural food stores
Incl. big farm shops with more than 50,000 EUR additional purchase

Supermarkets
Incl. drug stores

<table>
<thead>
<tr>
<th>Year</th>
<th>Supermarkets</th>
<th>Natural Food Stores</th>
<th>Other Sales Channels</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>4.76</td>
<td>2.71</td>
<td>1.51</td>
<td>8.98</td>
</tr>
<tr>
<td>2016</td>
<td>5.45</td>
<td>2.85</td>
<td>1.54</td>
<td>9.84</td>
</tr>
<tr>
<td>2017</td>
<td>5.92</td>
<td>2.91</td>
<td>1.51</td>
<td>10.34</td>
</tr>
<tr>
<td>2018</td>
<td>6.40</td>
<td>2.93</td>
<td>1.58</td>
<td>10.91</td>
</tr>
<tr>
<td>2019</td>
<td></td>
<td></td>
<td>3.18</td>
<td>12.26</td>
</tr>
<tr>
<td>2020</td>
<td></td>
<td></td>
<td>7.42</td>
<td>14.99</td>
</tr>
</tbody>
</table>

+ 22.0 %
+ 16.4 %
+ 35.0 %
+ 22.3 %
Key trends and developments: Farm to Fork strategy

- The Farm to Fork strategy, at the heart of the European Green Deal recognises the links between healthy people, healthy societies and a healthy planet.
- The F2F strategy includes a target which aims at achieving at least 25 percent of the EU’s agricultural land under organic farming by 2030.

To reach this target the organic sector needs political support at all levels.
- a good regulatory framework
- adequate support under the Common Agricultural Policy – with clear support for organic in the national strategic action plans – and
- Close collaboration of all stakeholders
Conclusions

• In 2019 organic farming continued to grow both in Europe and worldwide; and again all time highs were reached for the organic farmland, producers and market.

• Imports to the European Union remained stable, showing the EU is increasing local production.

• Major themes in 2020 were the impact of COVID-19 and the Farm to Fork Strategy, both of which are expected to have a positive effect on the organic sector.

• Public food procurement is on the rise, but data are missing in order to have a clear picture.

• For better monitoring of the development of the sector and to increase transparency, data collection and processing need to be improved in many countries, in particular for market and international trade data.
Thank you very much for your attention!

Resources

• «The World of Organic Agriculture» at www.organic-world.net
• Slides and infographics at www.organic-world.net
• Twitter.com/fiblstatistics
• Interactive data tables at statistics.fibl.org
• Interactive infographics at statistics.fibl.org
• Interactive map at www.ifoam-eu.org
Organic Agriculture in Europe 2019

**Organic Farmland 2019**
- Top 3 countries (largest organic area):
  - France: 2.2 m ha
  - Italy: 2.0 m ha
  - Spain: 2.4 m ha
- Organic farmland in million hectares: 16.5 m ha
- Organic share of total farmland: 3.3%

**Organic Producers & Processors 2019**
- The number of organic producers is increasing:
  - From 2018: 430'794
  - +2.8%
- Organic processors: 81'719
- Organic market growth: +8.9%

**Organic Market 2019**
- The European market is growing:
  - European organic retail sales in billion euros: 45.0
- Per capita spending: 55.8 €
- Organic market growth: +8.9%

### Organic retail sales: Top 3 countries (in billion euros)
- Germany: 12.0
- France: 11.3
- Italy: 3.6

### Number of producers: Top 3 countries
- Turkey: 74'545
- Italy: 70'561
- France: 47'196

### Organic market growth
- 13.4%

### Market share
- 12.1% Market share

### Highest per capita spending
- 344 € in Denmark

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**Source:** FiBL survey based on national sources
© FiBL, 2021

More information: www.organicworld.net - statistics.fibl.org
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BIOFACH eSPECIAL

Zhang Youting
Vice President // OABC (Organic and Beyond Cooperation, China)

Global Organic Market Overview
THURSDAY, FEB 18 // 14:00 - 15:30
有機農業在中國
Organic agriculture in China
Organic Agriculture in China (2021)
By December 31, 2019, there were a total of 68 certification bodies in China, issuing certifications in accordance with China's National Standards. Data were sourced from CNCA (http://food.cnca.cn).

- **Organic certifications**: 21,746
  - Domestic: 21,336
  - Overseas: 410

- **Organic companies**: 13,813
  - Domestic: 13,593
  - Overseas: 220

- **Organic plant area**: 2.33 million Ha
  - Domestic: 2.2 million ha
  - Overseas: 0.13 million ha

Source: cnca
Based on the amount for used codes, the consumption of organic products in China is growing by 17.2% per year since 2013.

China’s organic stickers which were put on record between 2012-2019

Source: cnca
Data shows an exceeding supply of organic products in China over its demand.

The market share of organic products in China was only 0.8% in 2019, which was far from its share in other countries such as Denmark. The per capita consumption was US$7, which was only half of the world's average level.

The output value, sales volume and ratio of organic products in 2014-2019

Source: cnca
In 2019, the sales value of the organic products in China were 9.826 billion dollars, of which processed product valued 9.188 billion U.S. dollars (accounting for 93.5% of total).

source: cnca
A large trade deficit: the imports were 2.5 times of the exports.

**Import Value:**
$1,819 million

The top three import origins:
- The Netherlands: $704 million
- Ireland: $474 million
- USA: $203 million

Main products:
milk powder, sterilized milk, flour products, cereal products, and red wine, accounting for 98.2% of the import trade value.

**Export Value:**
$727 million

The top three export destinations:
- The Netherlands: $155 million
- USA: $118 million
- Germany: $96 million

Main products:
cereals, soybean cakes, tea, Chinese herbal medicines, and vegetable oils.

source: cnca
Public perception of the organic products

- The requirements for animal welfare in organic farming: 29%
- Organic production emphasizes the ecological balance: 59%
- Requires related certifications: 65%
- Organic agriculture prohibits the use of genetically modified products: 65%
- NO synthetic pesticides, growth hormones, antibiotics or other synthetic substances is allowed in the organic production: 93%

Source: CNCA
Consumers' understanding of signs:

- **63.4%** know very well
- **21.1%** understand a bit
- **11.2%** heard of but not aware of
- **4.2%** totally don't know

Source: CNCA
Consumers' expectation to the price difference

- within 1 time
- 1-3 times
- 3-5 times
- 5-10 times
- don't mind

source: cnca
2020 is such a special year. The Covid-19 crisis has brought a huge impact to our entire society and to every individual. Many people will ask us what impact the pandemic has to us?
Thank you!
David Amudavi
Executive Director
// Biovision Africa Trust

Global Organic Market Overview
THURSDAY, FEB 18 // 14:00 - 15:30
Global Organic Market Overview: The Case of Africa

Virtual Biofach
18 February 2021

David Amudavi
Executive Director
Biovision Africa Trust
Nairobi, Kenya
Africa: Organic agriculture in Africa 2019

- **2.0 million hectares** of certified organic agricultural land (data 2019).
  - This constitutes 0.2% of the total agricultural area in the region and about 3% of the world’s organic agricultural land.

- **850,000 producers** were reported.

- Four countries have the most organic land: Tunisia (286,623 hectares), Tanzania (278,467 hectares), and Ethiopia (221,189 hectares).

- The highest shares of organic land are in Sao Tome and Prince (24.9%), Sierra Leone (4.0%), and Réunion (3.1%).

- The majority of **certified organic produce** is for **export markets**.

- The **European Union**, as the **major recipient of the exports**.

Source: FiBL survey 2021
Africa: Use of organic agricultural land 2019

Source: FiBL survey 2021; based on information from the private sector, certifiers, and governments.

Land use types 2019

- Arable land crops 27%
- Permanent crops 64%
- Permanent grassland 1.33%
- Other/No details 8%

Key arable crops:
- Oilseeds 184
- Textile crops 86
- Cereals 74
- Dry pulses 52
- Medicinal plants 46

Key permanent crops:
- Coffee 330
- Olives 244
- Cocoa 217
- Nuts 187
- Medicinal plants 52
Africa: The ten countries with the most organic producers
2019
Source: FiBL survey 2021

• Africa has 2.0 million hectares (0.2% of the total agricultural area)
• Continent has about 850,000 producers.
• Top ten countries have 95.6% of the producers.
Status of Ecological Organic Agriculture in Africa

Figure 1: Ecological Organic Agriculture Status of the 55 Countries of Africa

A natural future for all collectively
Opportunities for Organic Trade in Africa

1. Rapid population growth in rural and urban areas & rising income levels – Going beyond the growing middle class.

2. Strong growth potential in the continent’s food sector and Africa’s underutilised arable land provide considerable investment opportunities.

3. Global food consumption growth – health, nutrition and environmental concerns – leading to growing demand and markets in Europe, US, etc.


5. The African Continental Free Trade Area (AfCFTA) – market integration and intra-regional trade, eliminating tariff and non-tariff barriers.


7. The COVID-19 crisis – the pandemic makes it even more mandatory to strive towards more sustainable and resilient food systems.
BOOK LAUNCH

SURVIVING COVID-19
THE NEGLECTED REMEDY

By The National Green
Bank of Uganda

THE AUTHORS

EOA
ECOLOGICAL ORGANIC AGRICULTURE

A natural future for all collectively

damudavi@biovisionafrica.org
Amada Velez

Global Organic Market Overview
THURSDAY, FEB 18 // 14:00 - 15:30
Organic Agriculture in Latin America and Caribbean: Production, perspectives and challenges.

Amada Vélez Méndez
México.
The Inter-American Commission of Organic Agriculture (CIAO) is a technical institution created on July 2008 by the Ministries of Agriculture through the Executive Committee of IICA with the end of contributing the development of the organic activities in American countries and enhancing products trading.

CIAO is comprised of Competent Control and Promotion Authorities of the Member Countries.
CIAO is comprised of Competent Control and Promotion Authorities of the Member Countries.

“Producing healthy food, conserving natural resources and biodiversity, contributing to the mitigation of climate change, favoring rural development.”

Board of Directors: Ecuador, Bolivia, Brasil, México.
Organic Agriculture in the world:
Surface

Surface of certified and on conversion organic in 2018 by Region
71.5 Millions of ha. Worldwide

- Oceania (35.99 M)
- Europa (15.63 M)
- America (11.34 M)
- Asia (6.53 M)
- Africa (1.98 M)

Distribution of the GLOBAL certified surface

- CIAO + España y Portugal: 16%
- No CIAO: 84%

Distribution of the Certified production in THE AMERICAS

- CIAO: 88%
- No CIAO: 12%
Organic Agriculture in the world:
Producers

Certified producers by region on 2018
2,79 Millions worldwide

- Asia (1.317.023)
- Africa (788.858)
- America (251.566)
- Europe (418.610)
- Oceania (20.859)

CIAO producers worldwide
- CIAO: 9%
- No CIAO: 91%

CIAO producers in Las Américas
- CIAO: 4%
- No CIAO: 96%
Organic Agriculture in the world:
Organic Market, its evolution.

Organic Global Market Evolution
(Total retail sales)
2018

- 2001: 21,000,000 USD
- 2006: 38,600,000 USD
- 2011: 64,900,000 USD
- 2018: 105,000,000 USD

Source: Ecovia Intelligence 2020

Market distribution (2018) by Región
- North America: 45%
- Europe: 42%
- Asia: 10%
- Oceania: 2%
- ALyC: 1%
- CIAO (44,9 mil M)
- Spain y Portugal (observadores) (2,1 mil M)
- No CIAO (57,98 M)
Facts and Perspectives:

- The organic market will keep on growing at a sustained rate (food and drinks global market grows annually at 2-4% vs organic market 10%)
- The SARS-CoV-2 outbreak reinforced the search for healthy and safe food
- Most of the countries in the world practice organic agriculture, but despite the increasing recorded in LAandC the demand keeps concentrated in North America and Europe (85%)

Challenges and Opportunities:

- Keeping the development of local markets in countries of LAandC.
- Promote the development of intra-regional trade (our production complement each other)
- Emergence of new markets: East and Middle-East.
- Increase of competition with other “sustainable” seals: The organic seals is certified guarantee of sustainability.
- Promotion of the public politics for the development of organic agriculture in LAandC.
- Establishing High impact Policies such as the European Green Deal and Farm to fork
X Asamblea de la CIAO (Cusco, 2018)
Visita a Feria Orgánica en Urubamba
Thanks!

• Rommel Betancourt (Agrocalidad Ecuador) President JD/CIAO: rommel.betancourt@agrocalidad.gob.ec
• Graciela Lacaze, SE/CIAO: st.ciao@iica.int
• Juan Manuel Gámez, Technical Assistant SE CIAO: st.ciao@iica.int

• WEB PAGE: http://ciaorganico.net/

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  ▪ CIAOrganico: https://www.youtube.com/channel/UCFk1RPsRgmU-WzERT6PEkXA
FROM ITS ROOTS, ORGANIC INSPIRES LIFE

Organic World Congress 2021

6-10 SEPTEMBER 2021
RENNES, FRANCE

Stay tuned!
https://owc.ifoam.bio/
We are leading change, organically!

Together with our members in over **100 countries** and territories as well as regional bodies and sector platforms. We inspire change.

Why not **join us?**

Go to: https://ifo.am/Join
Thank you

www.ifoam.bio