



Challenges and Opportunities for the Organic Supply Chains

Miguel de Porras (miguel.deporras@fibl.org)

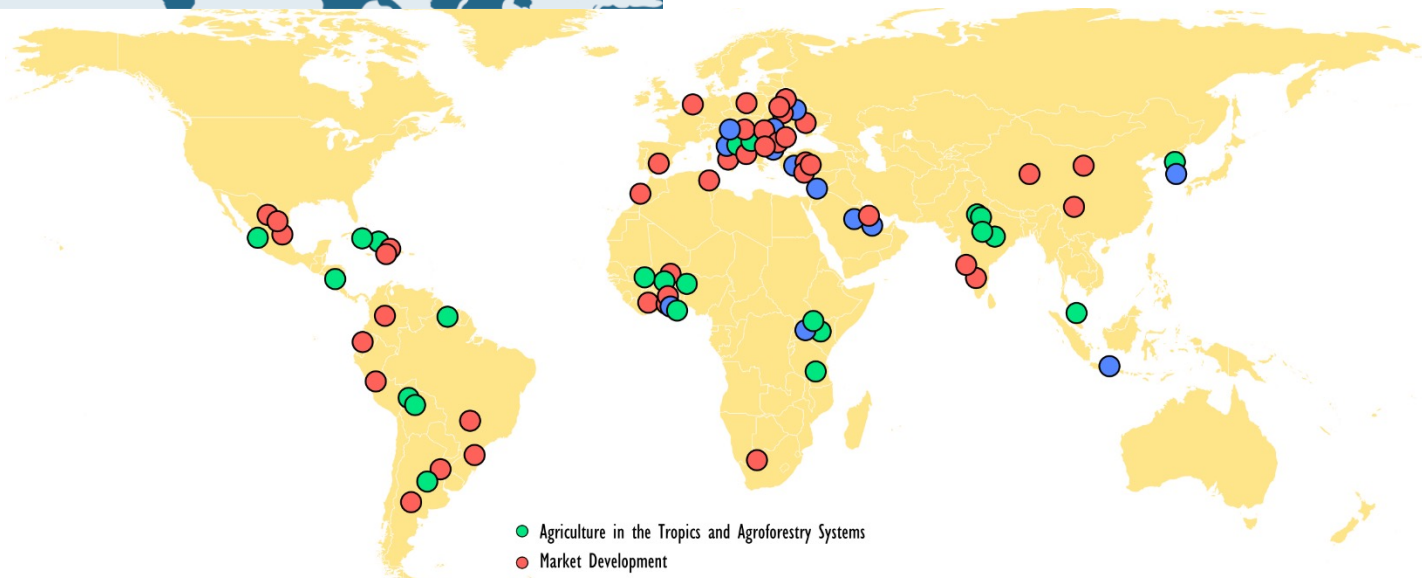
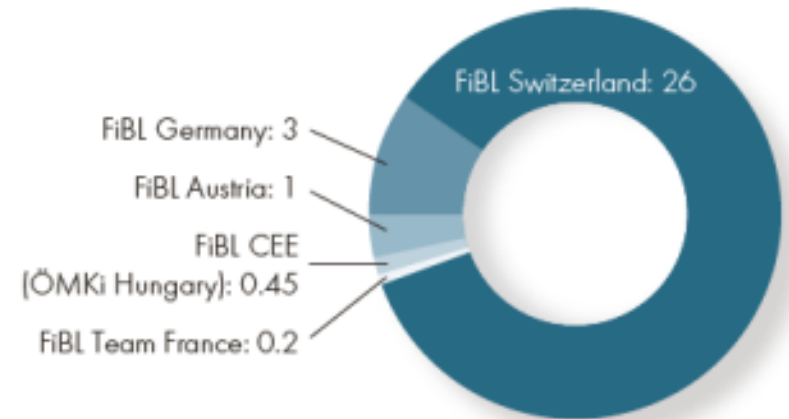
15 September 2022

ENRD Thematic Group Organic Supply Chains

FiBL – Research for Organic Agriculture since 1973

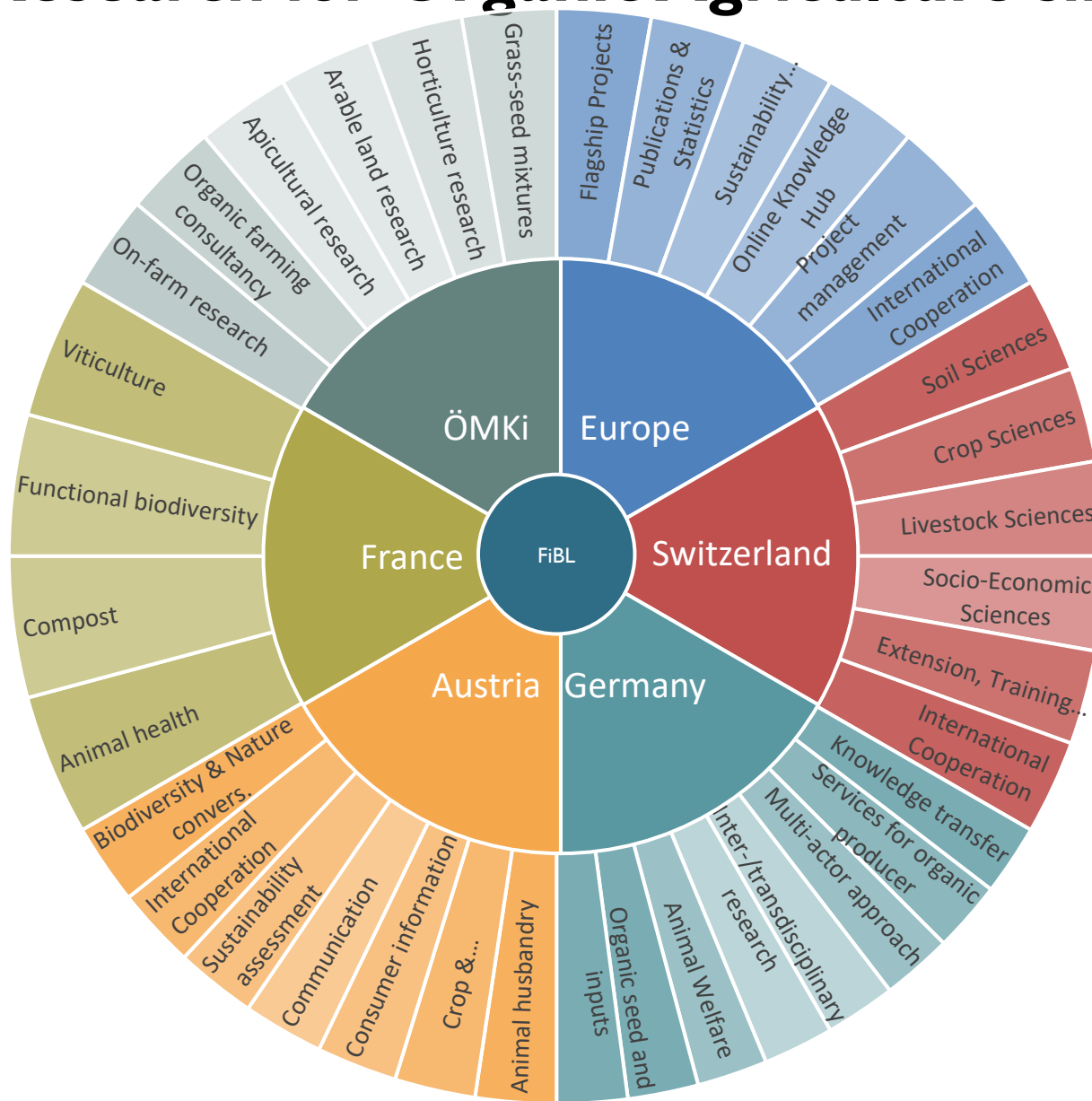


Annual budgets (in million €)



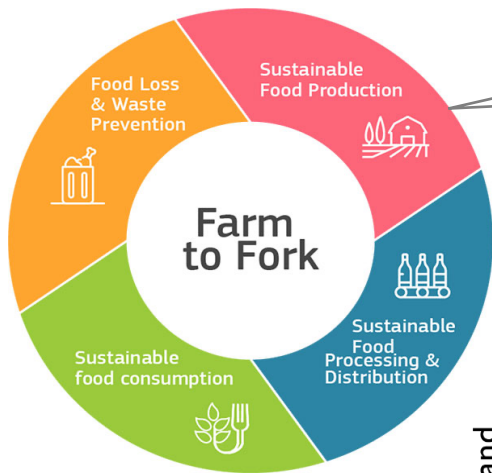
- Agriculture in the Tropics and Agroforestry Systems
- Market Development
- Policy and Sector Development

FiBL – Research for Organic Agriculture since 1973

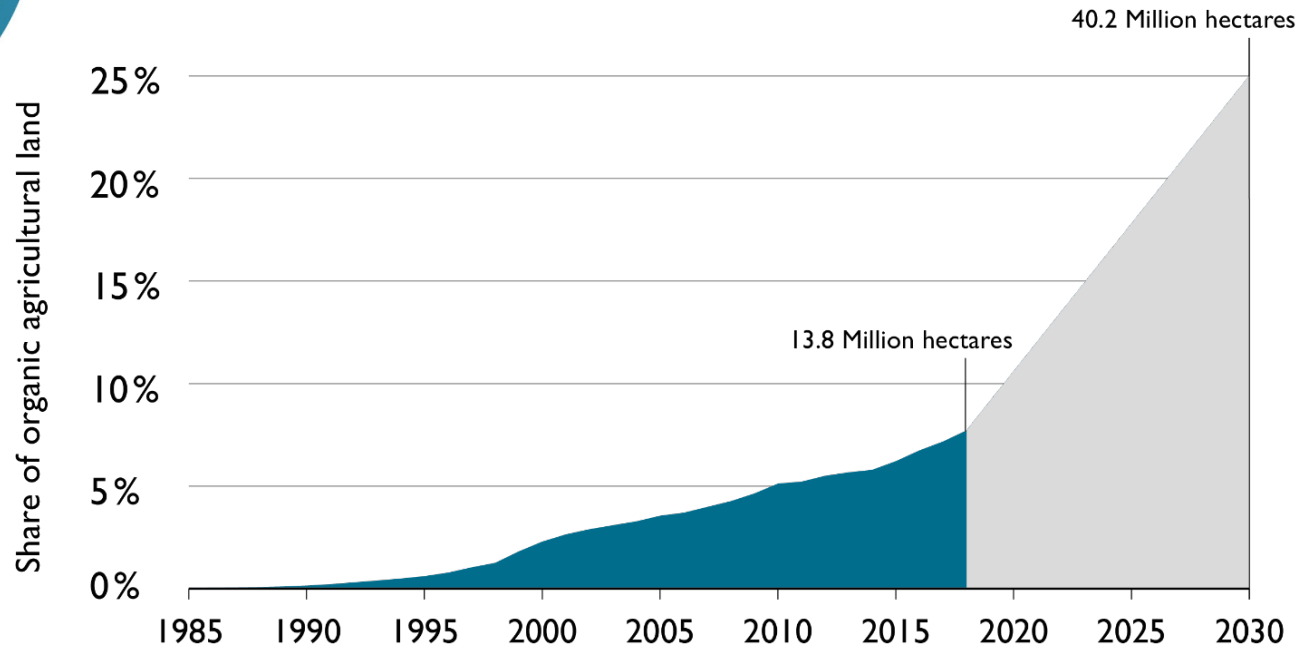


Challenges and Opportunities: The EU Organic Market

Ambitious targets of the F2F strategy



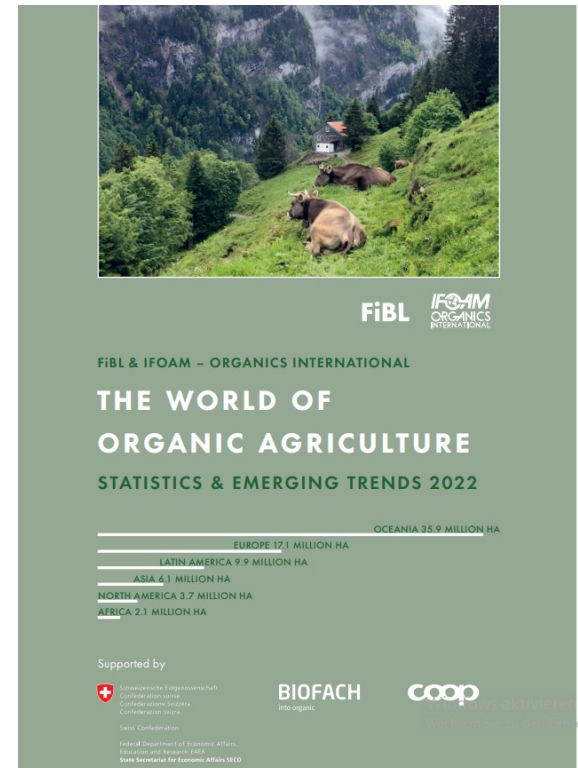
25% organic until 2030



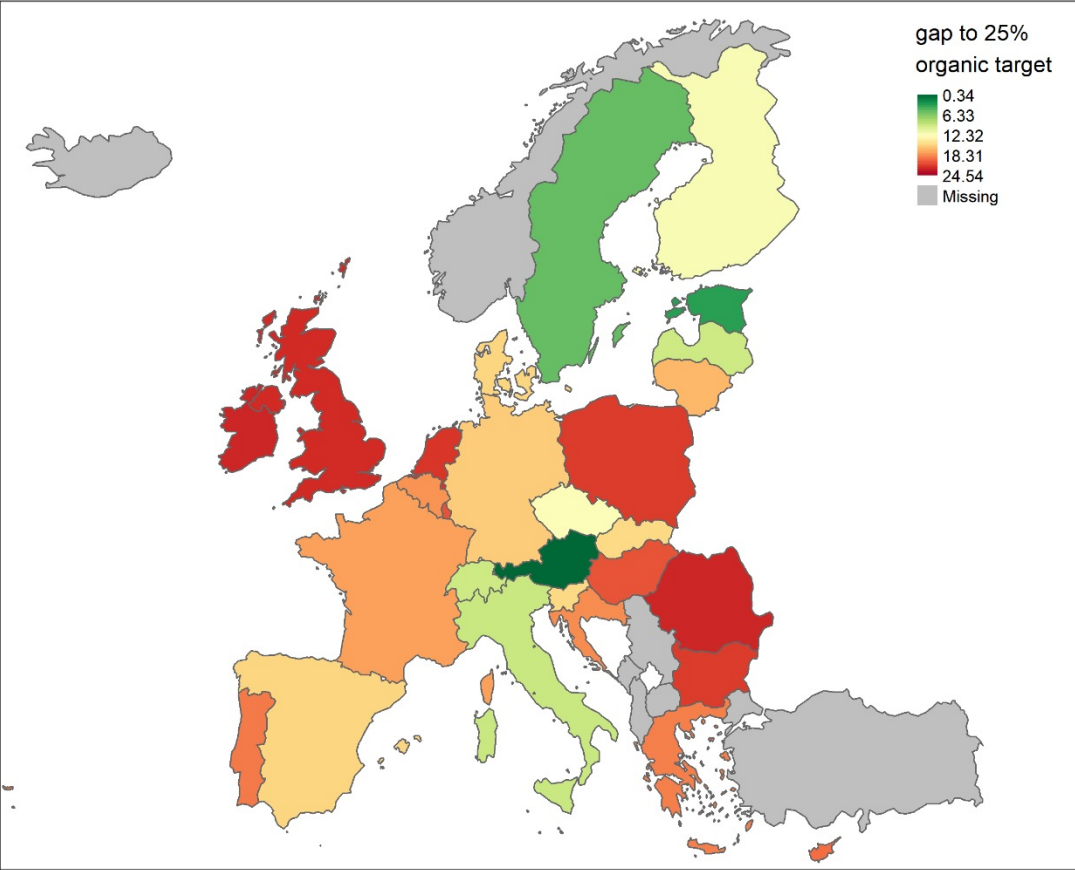
The World of Organic Agriculture 2022

www.organic-world.net

- › The 23rd edition of «The World of Organic Agriculture», was published by FiBL and IFOAM – Organics International in February 2022.
 - › Data tables and graphs
 - › Country and continent reports
 - › Markets, standards, policy support
- › The book can be ordered or downloaded at (item number 1344): <https://www.fibl.org/en/shop-en>

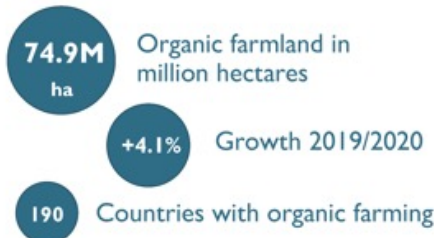


No «one size fits all» - differences between countries

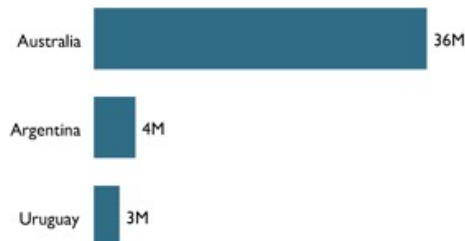


Organic Agriculture Worldwide 2020

Organic Farmland



Land in million hectares Top 3 countries

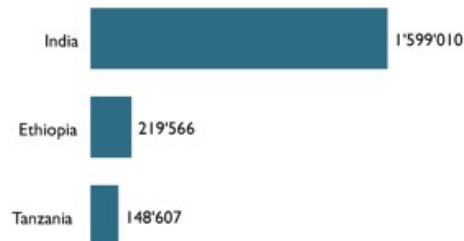


Organic Producers

The number of organic producers is increasing



Number of producers Top 3 countries

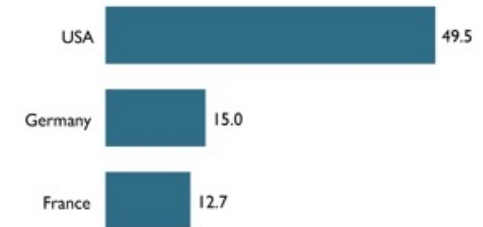


Organic Market

The global market is growing and consumer demand is increasing



Market in billion euros Top 3 countries



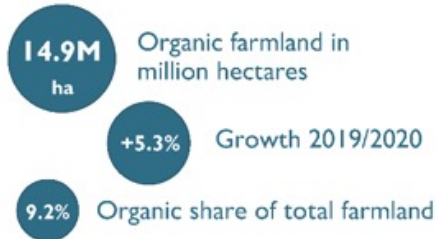
Market growth in percent Top 3 countries



Source: FiBL survey based on national sources
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More information: www.organic-world.net - statistics.fibl.org

Organic Agriculture in the European Union 2020

Organic Farmland



Land in million hectares Top 3 countries

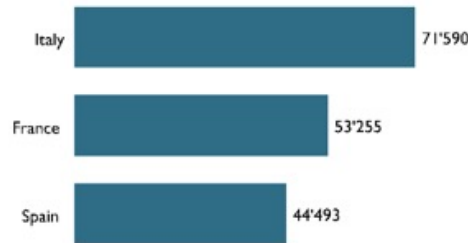


Organic Producers

The number of organic producers is increasing



Number of producers Top 3 countries

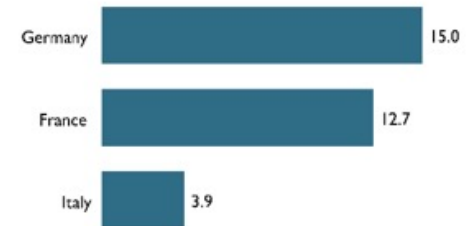


Organic Market

The European Union market is growing



Market in billion euros Top 3 countries



Market growth in percent Top 3 countries

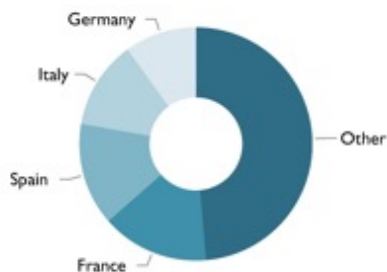


Source: FiBL survey based on national sources
© 2022
More information: www.organic-world.net - statistics.fibl.org

EUROPE: ORGANIC FARMLAND 2020



More than half of Europe's organic agricultural land is in four countries.



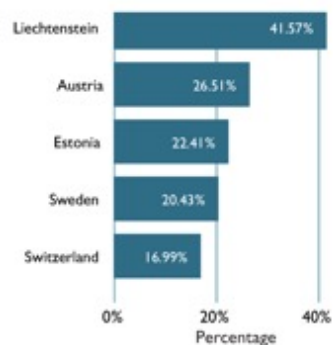
Distribution of organic agricultural land by country 2020.

The country with the largest organic agricultural area is France, followed by Spain and Italy.



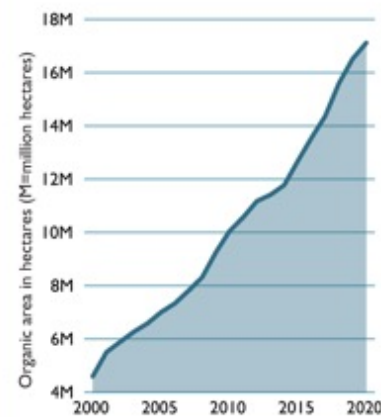
The five countries with the largest areas of organic agricultural land 2020.

15 countries have 10% or more of their agricultural land under organic management.



The five countries with more than 10% of organic agricultural land 2020.

In 2020, nearly 0.7 million hectares more were reported compared with 2019.



Growth of the organic agricultural land 2000-2020.

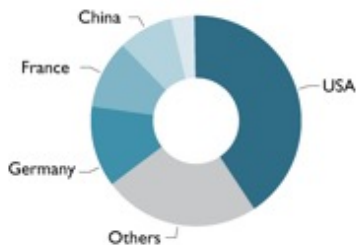
www.fibl.org

Source: FiBL 2022 www.organic-world.net - statistics.fibl.org

EUROPE: ORGANIC RETAIL SALES 2020



The European Union (44.8 billion €) is the second largest single market after the US (49.5 billion €) and China (10.2 billion €). By region, North America has the lead (53.7 billion €), followed by Europe (52.0 billion €) and Asia (12.5 billion €).

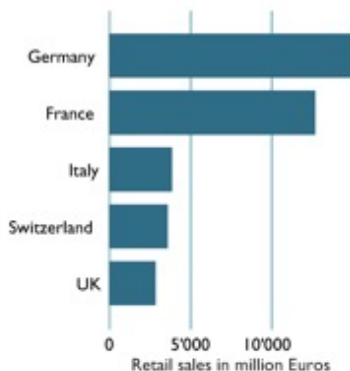


Distribution of retail sales by country 2020.

www.fibl.org



The European countries with the largest markets for organic food are Germany (15 billion €), France (12.7 billion €), Italy (3.9 billion €) and Switzerland (3.6 billion €).



The five countries with the largest markets for organic food in 2020.



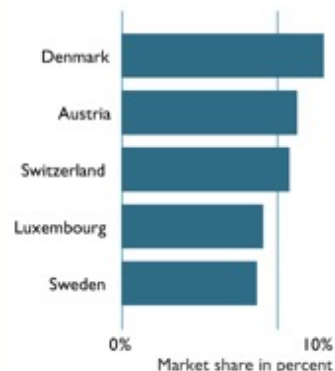
Switzerland has the highest per capita consumption worldwide, followed by Denmark, Luxembourg, Austria and Sweden.



The five countries with the highest per capita consumption 2020.



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

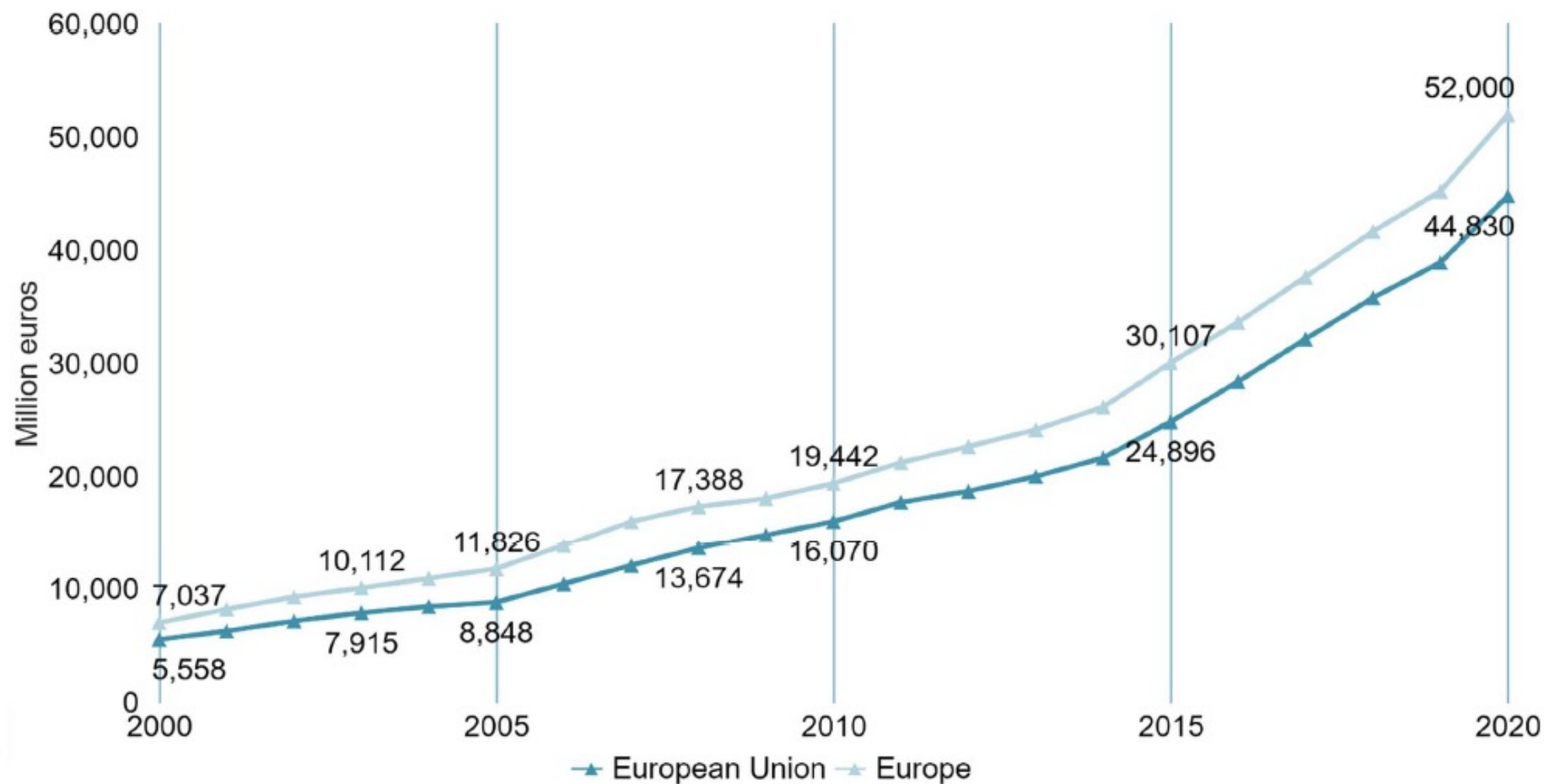


The five countries with the highest organic shares of the total market in 2020.

Source: FiBL 2022 www.organic-world.net - statistics.fibl.org

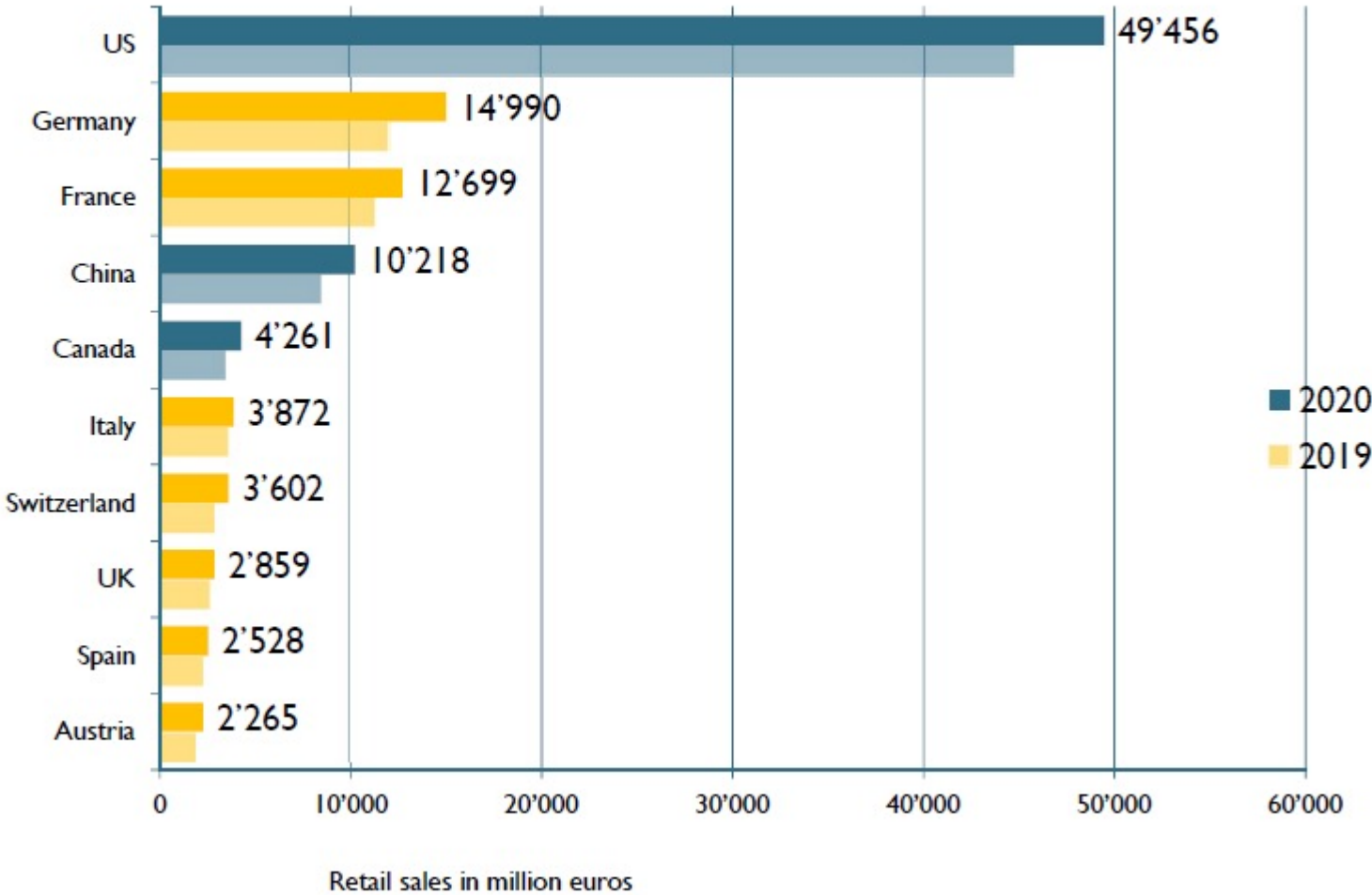
Europe and the European Union: Growth of organic retail sales 2000 - 2020

Source: FiBL-AMI surveys 2001-2022



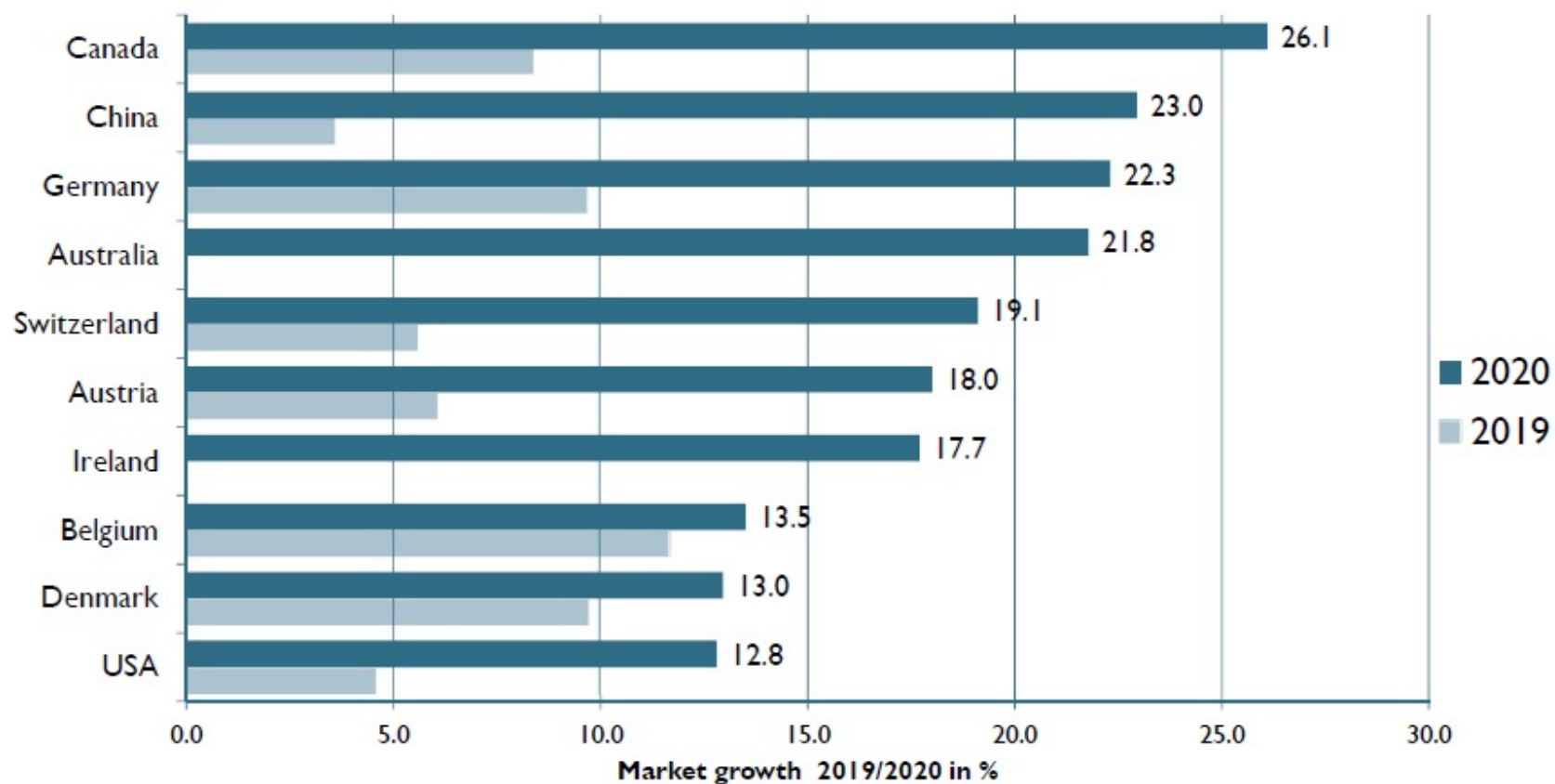
Top 10 organic markets 2019 and 2020

Source: FiBL AMI survey 2022



The ten countries with largest organic market growth 2020

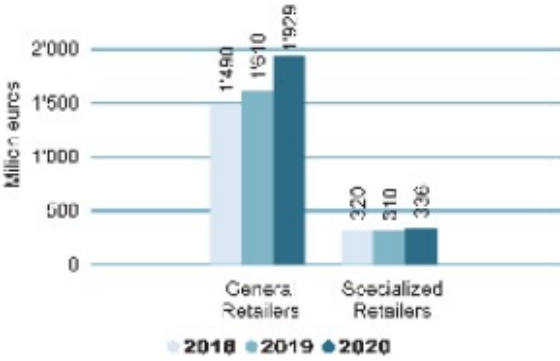
Source: FiBL-AMI-survey 2022



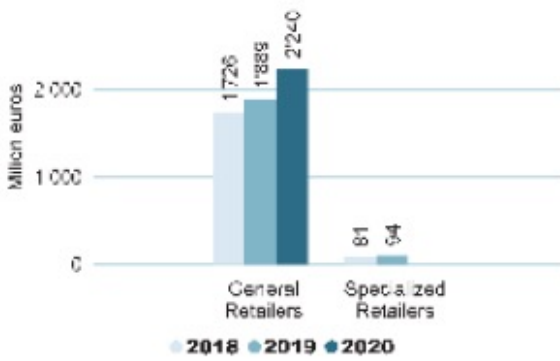
Europe: Growth of marketing channels for organic products 2018 - 2020 in selected countries

Source: Austria: AMA Marketing, Denmark: Organic Denmark/LV, France: Agence Bio, Germany: Arbeitskreis Biomarkt, Italy: AssoBio/Nomisma, Switzerland: Bio Suisse.

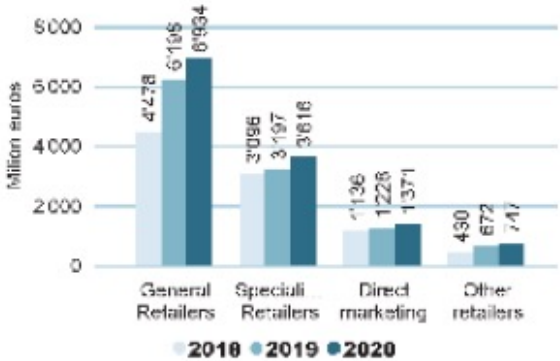
Austria



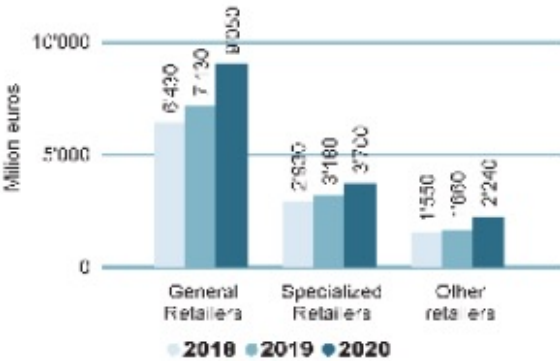
Denmark



France



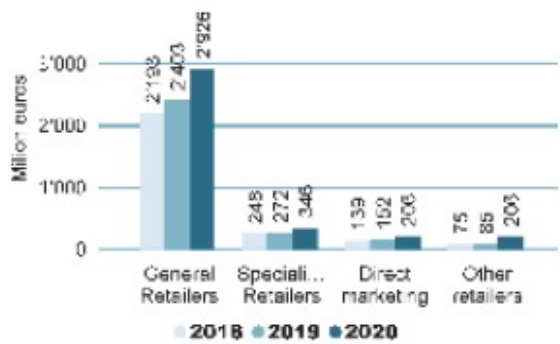
Germany



Italy

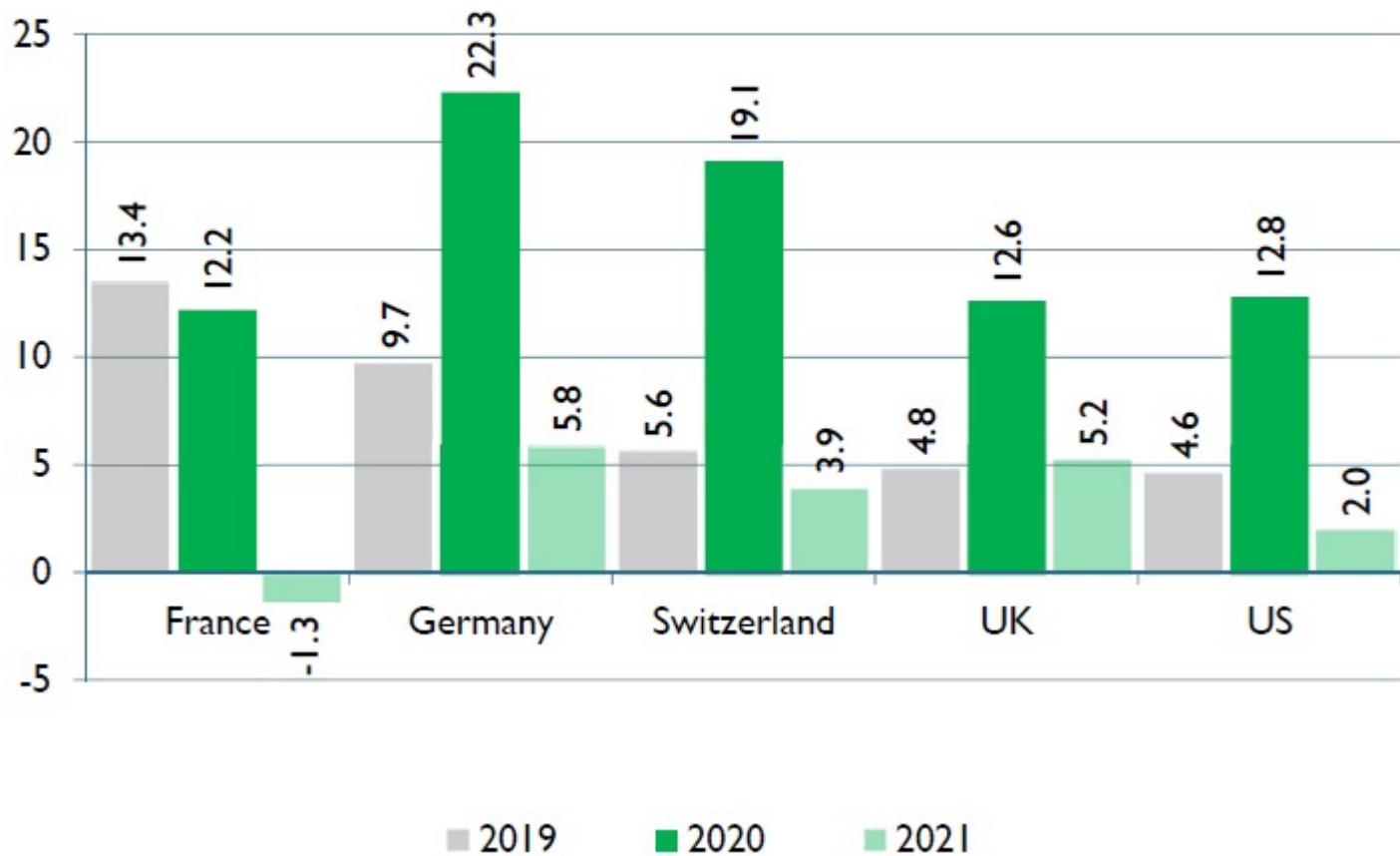


Switzerland

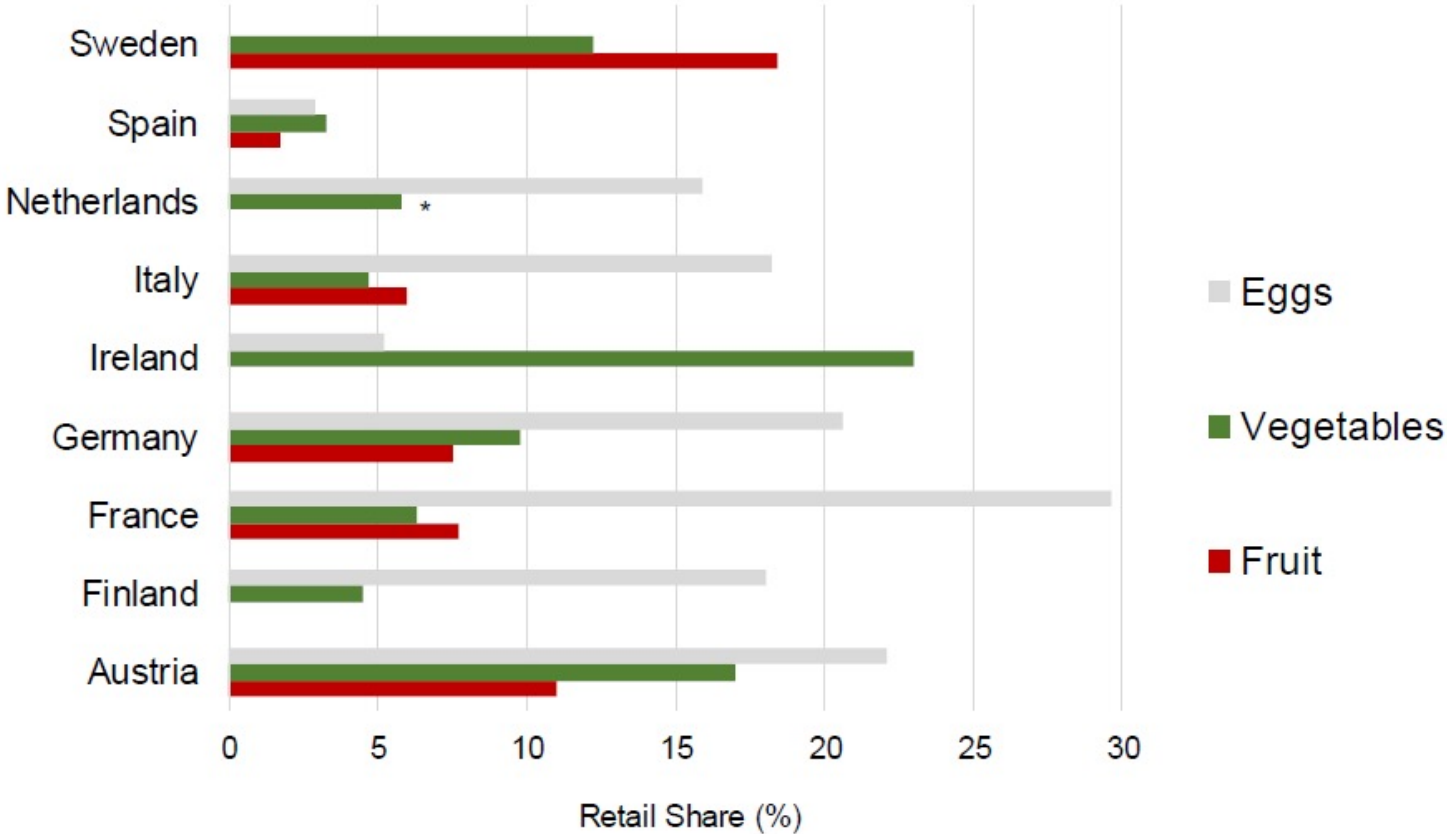


Market growth rates 2019, 2020 and 2021 compared

Source: FiBL-AMI survey 2022



Organic retail sales shares of 3 main categories in different EU countries

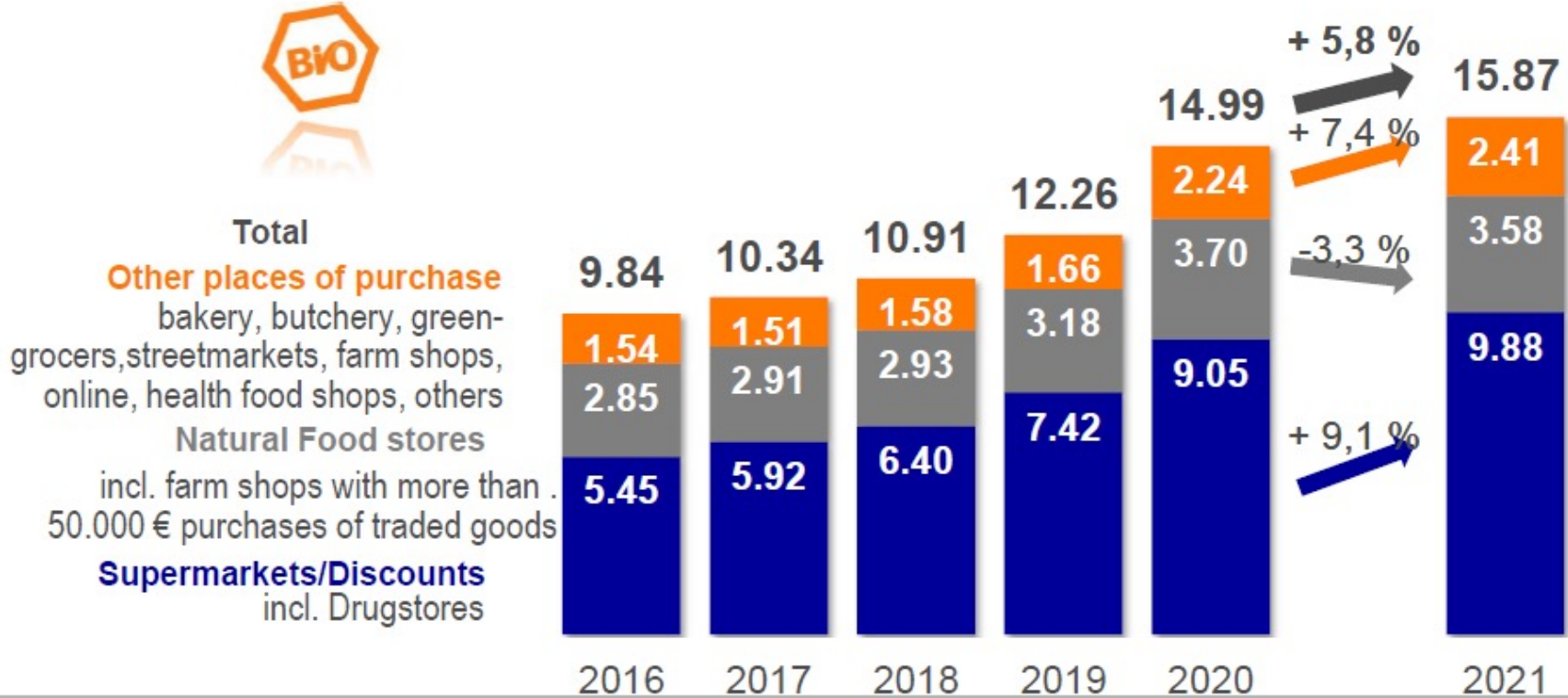


* Fruits and Vegetables share

2021 good Growth after extraordinary Growth in 2020



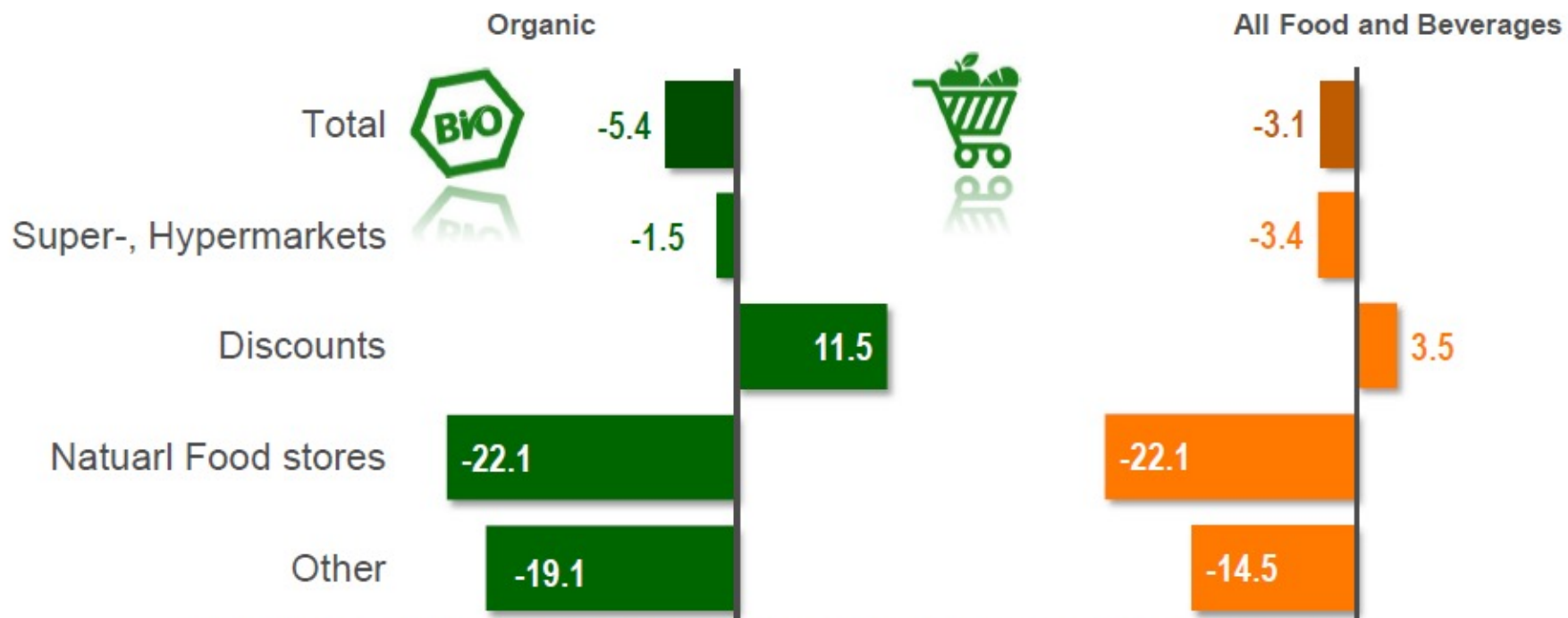
Consumer expenditure for organic food and beverages by place of purchase, Germany, in Billion EUR (excluding out of home consumption)



Decreasing retail turnover – also for conventional food

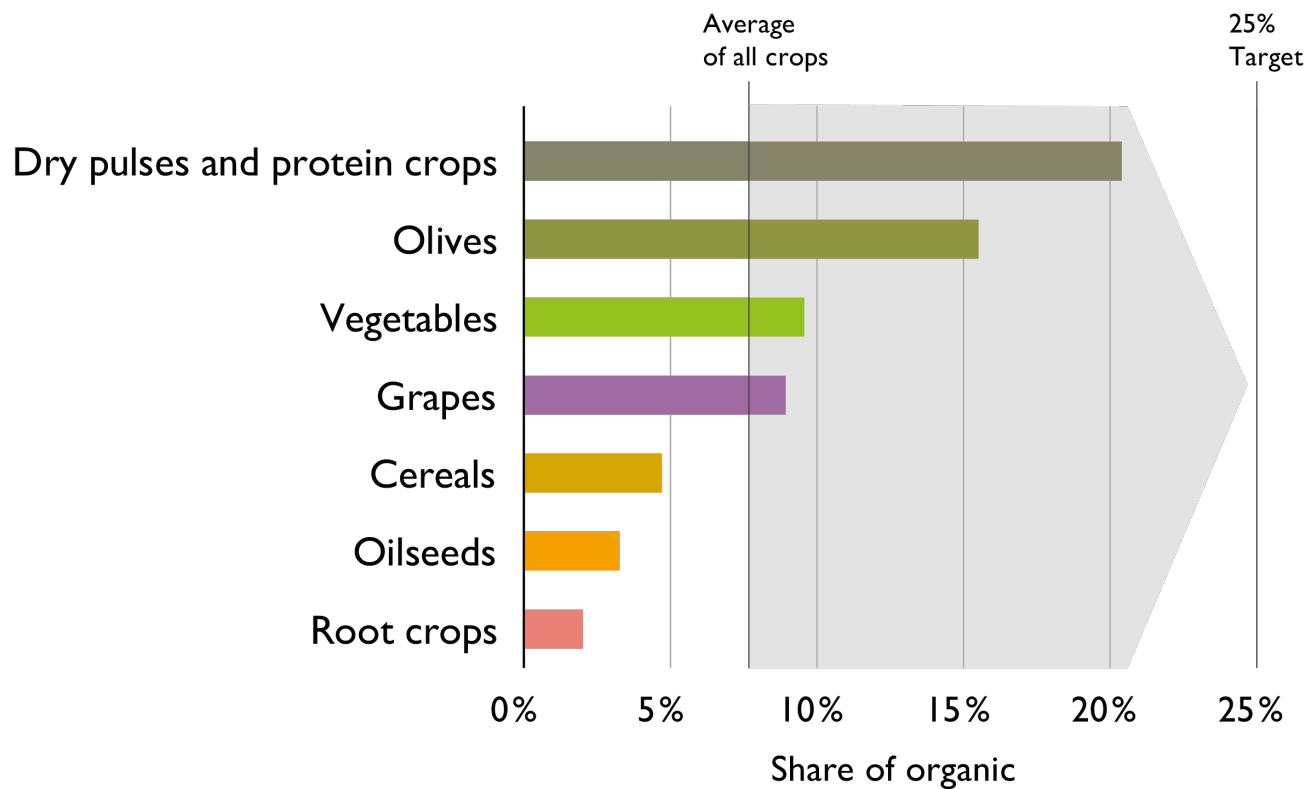


Change of retail turnover with fresh food* - organic and total food, by place of purchase, in %, Jan-June 2022 vs. Jan-June 2021



* Meat, Meat Products, Poultry, Eggs, fresh Fruit, fresh Vegetables, Potatoes, Cheese, Bread, Milk and milk products including Butter, Soja- and other plant based Milk substitutes, Oil, Flour etc..

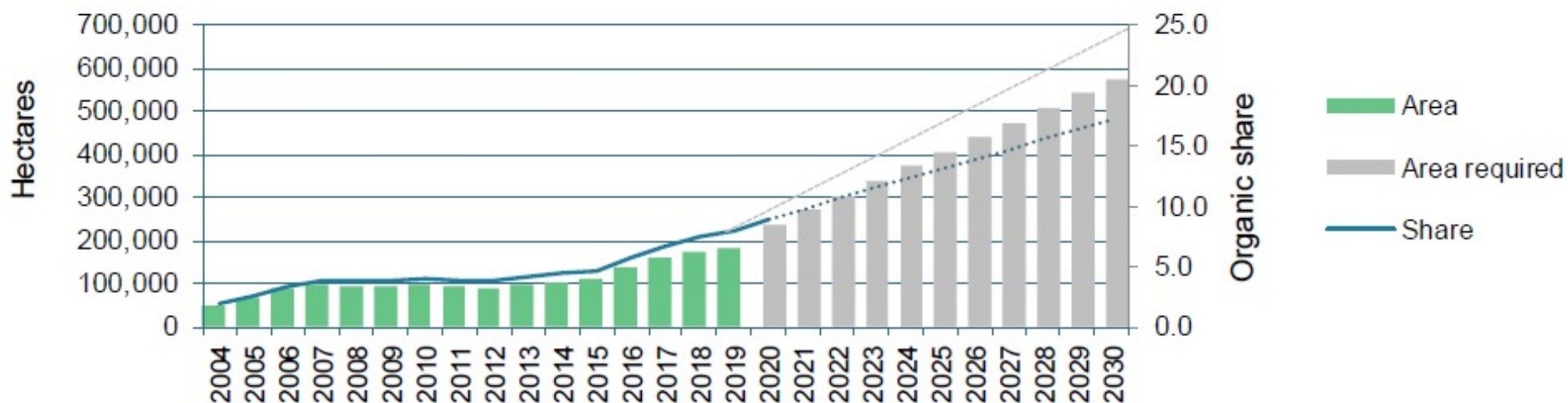
No «one size fits all» - differences between crops



Organic Vegetables

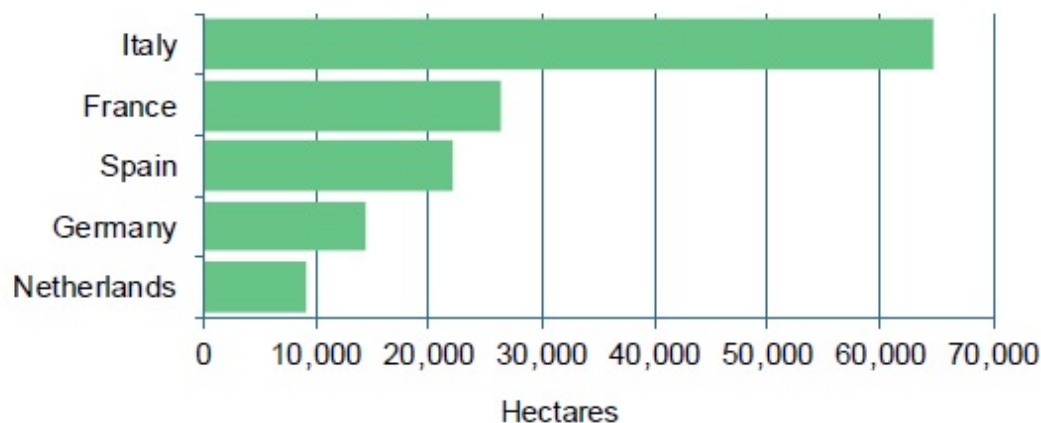
Development of EU organic area 2004-2019

Source: FiBL-IFOAM-SOEL-Surveys 2004-2020

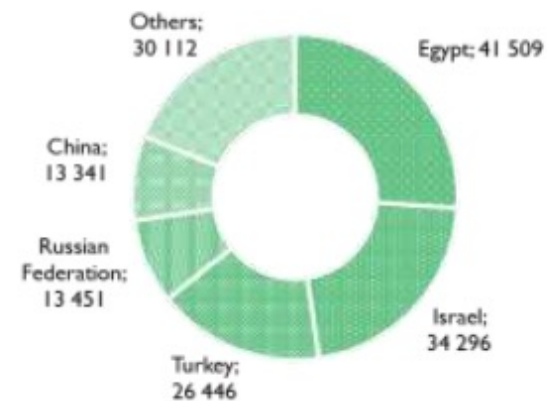


Vegetables: Top 5 countries 2019

Source: FiBL survey 2020



Vegetables: Main exporters to EU 2019 (Mt)



Organic Fruits of Temperate Climate Zones

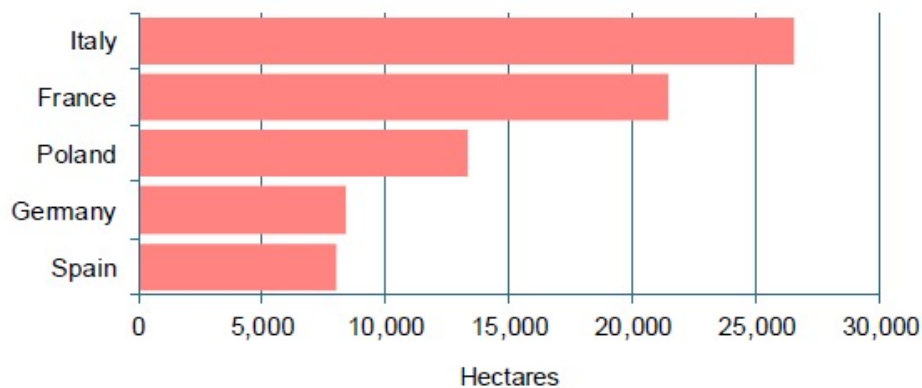
Development of EU organic area 2004-2019

Source: FiBL-IFOAM-SOEL-Surveys 2004-2020

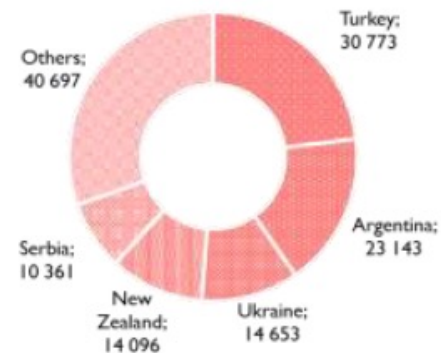


Temperate fruit: Top 5 countries 2019

Source: FiBL survey 2020



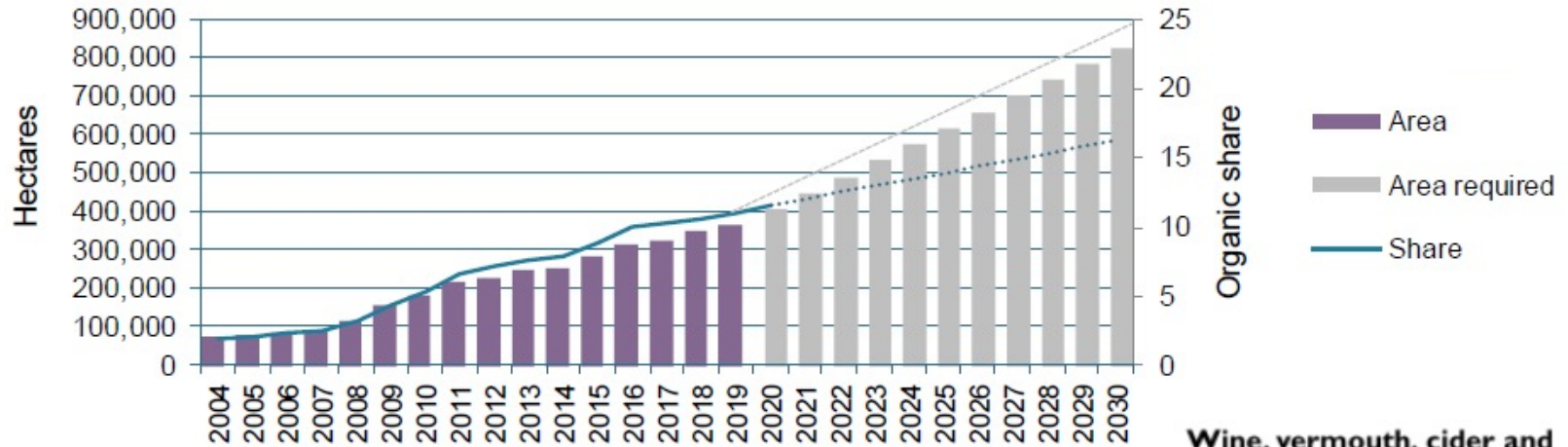
Temperate fruit, fresh or dried: Main exporters to EU 2019 (Mt)



Organic Grapes

Development EU organic area 2004-2019

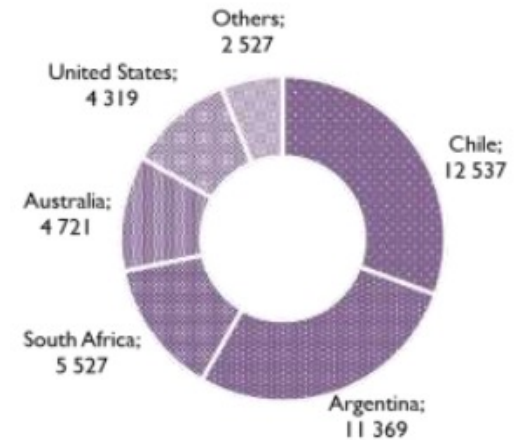
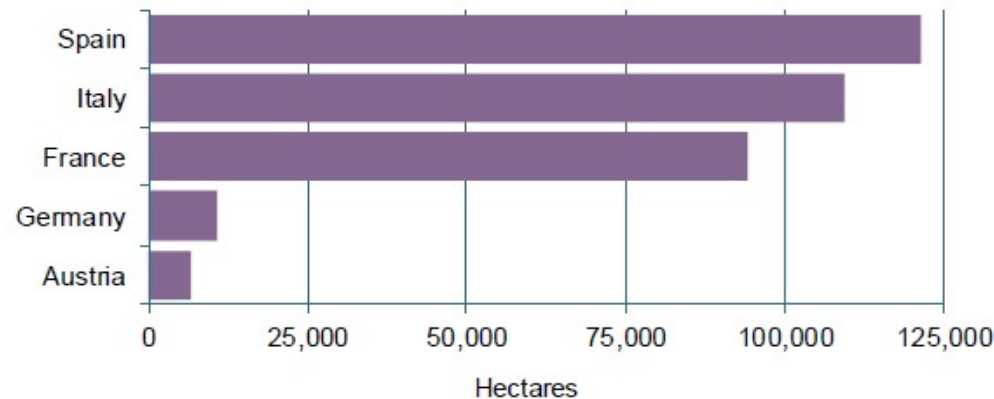
Source: FiBL-IFOAM-SOEL-Surveys 2004-2020



Wine, vermouth, cider and vinegar: Main exporters to EU 2019 (Mt)

Grapes: Top 5 countries 2019

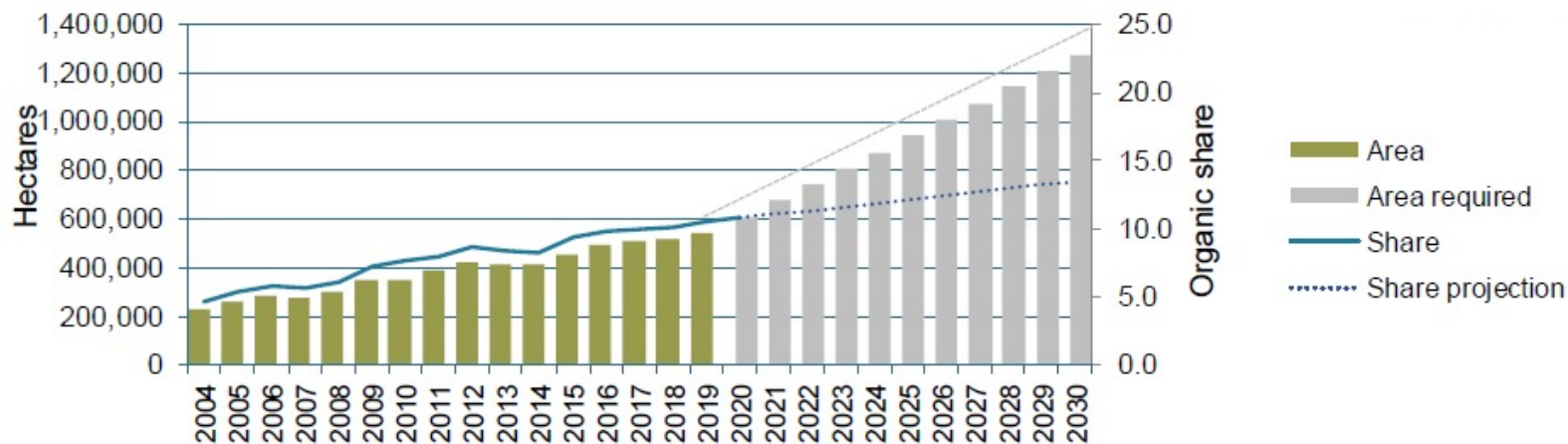
Source: FiBL survey 2020



Organic Olives

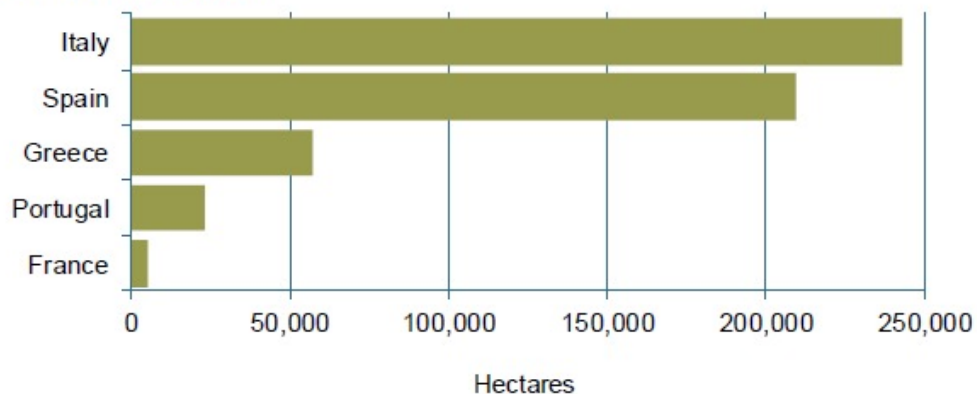
Development of EU organic area 2004-2019

Source: FiBL-IFOAM-SOEL-Surveys 2004-2020



Olives: Top 5 countries 2019

Source: FiBL survey 2020

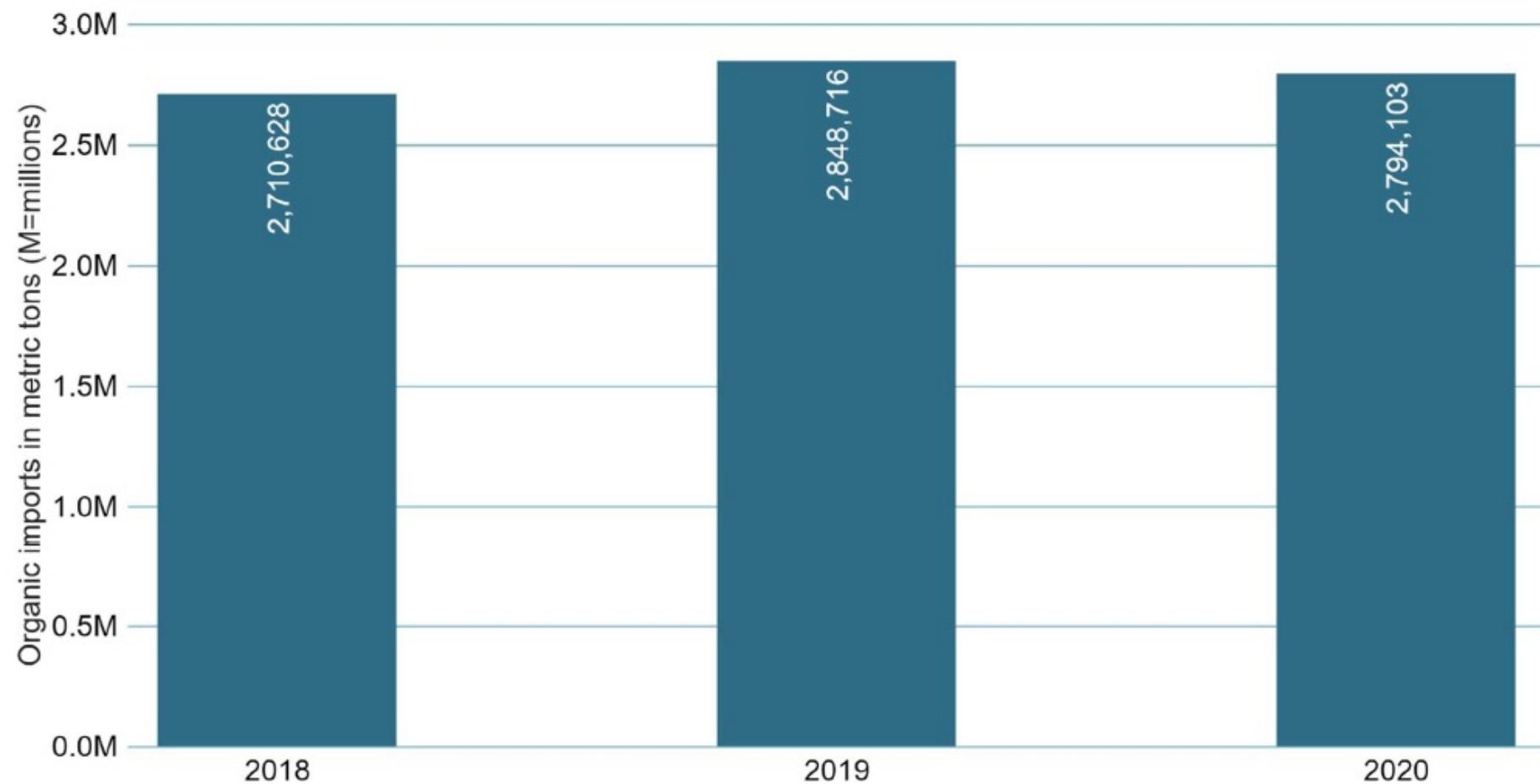


Olives oil: Main exporters to EU 2019 (Mt)



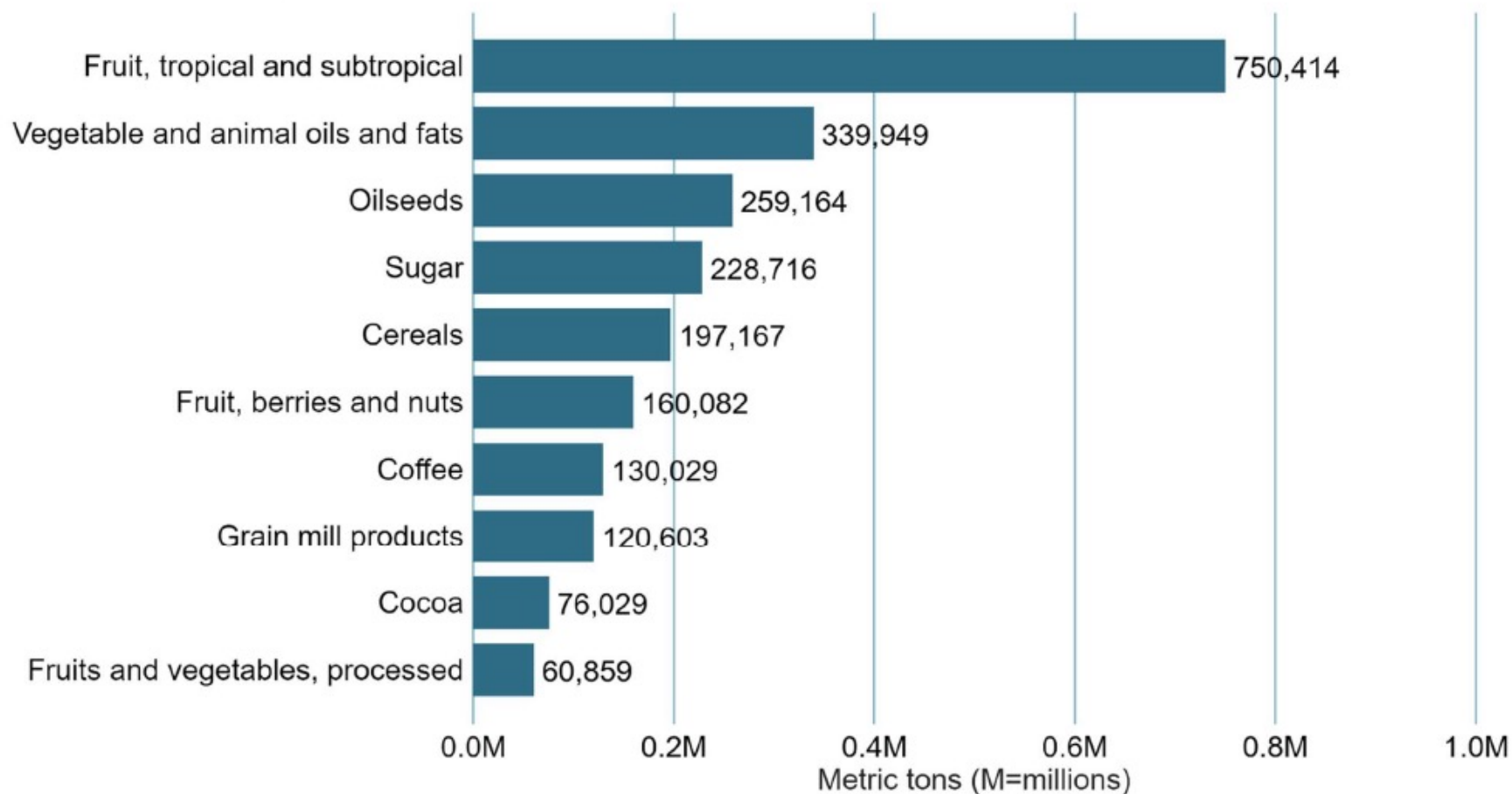
European Union: Organic agri-food imports development 2018 - 2020

Source: Traces/European Commission



European Union: Main product categories of EU organic agri-food imports 2020

Source: Traces/European Commission 2021



Acknowledgements

The Swiss State Secretariat of
Economic Affairs (SECO)

Coop Sustainability Fund

NürnbergMesse, the organizers of BIOFACH

IFOAM – Organics International

More than 200 experts from all parts of the world contributed to the
FiBL survey 2022.



Price Premium Dynamics: Eggs (PL)

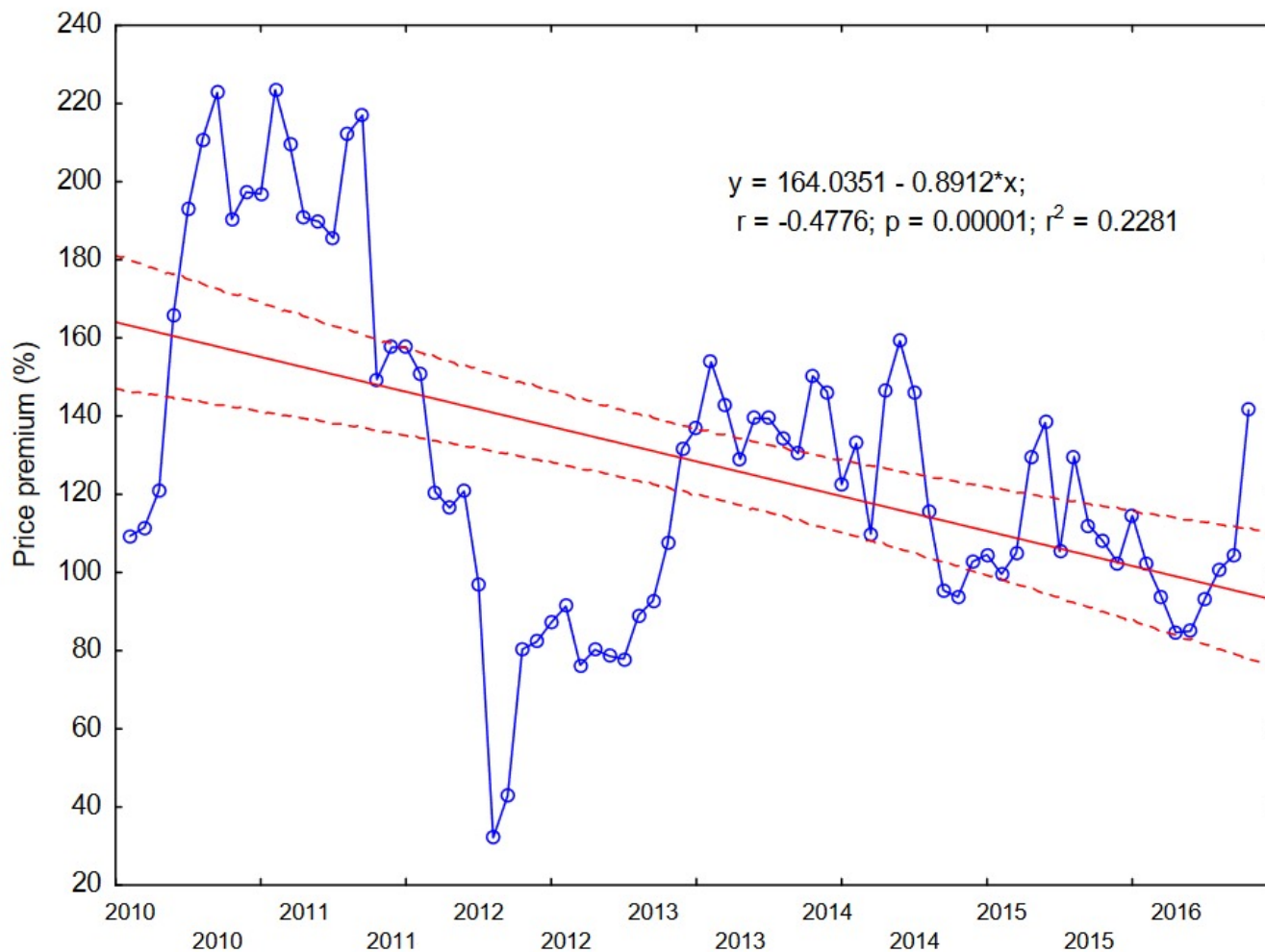


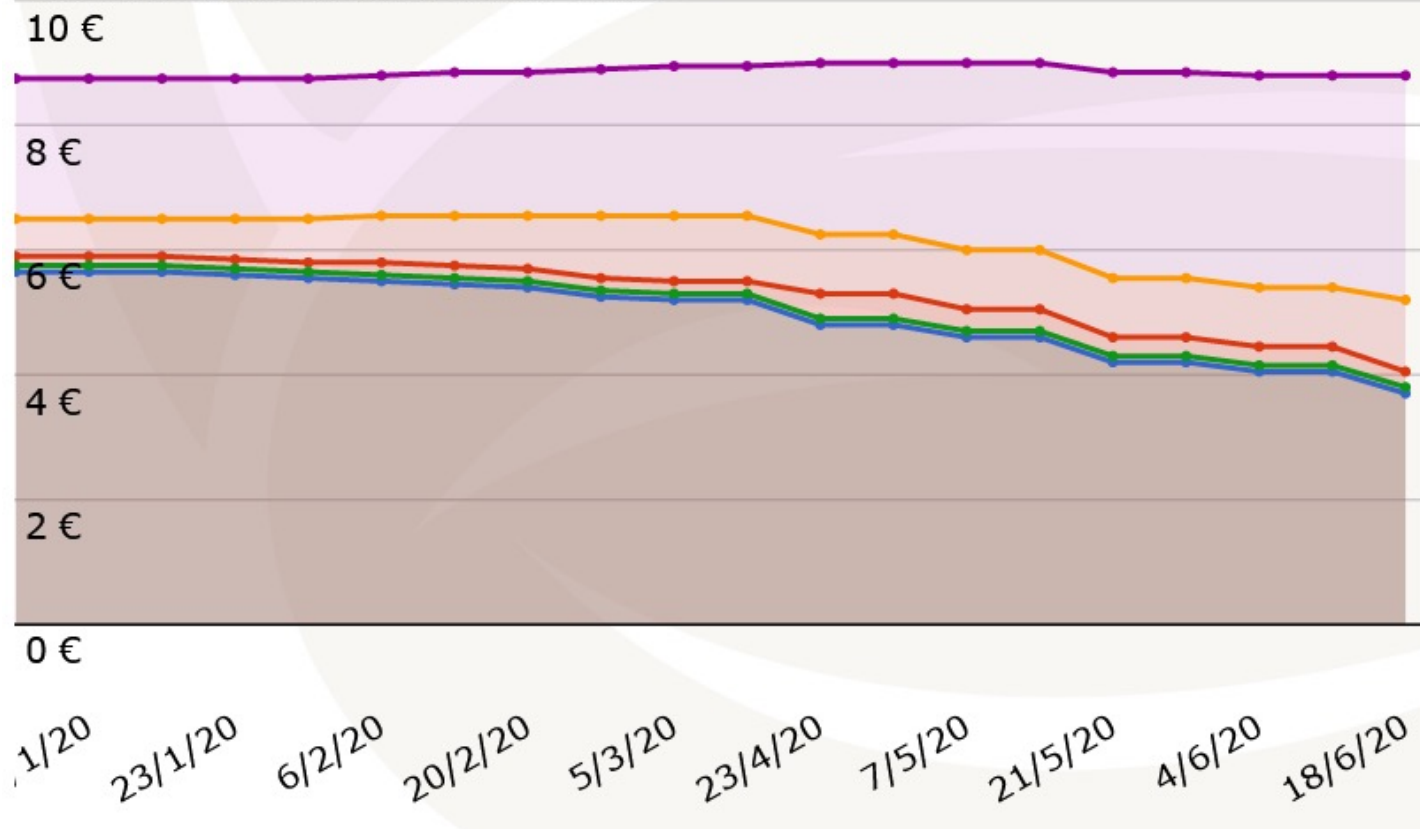
Figure 7. Price premiums for organic eggs on the Polish market in the analyzed period.

Price Premium Dynamics :Almonds (ES)

Evolución del precio de la almendra en la lonja de Albacete

Comuna Largueta Marcona Guara Ecológica

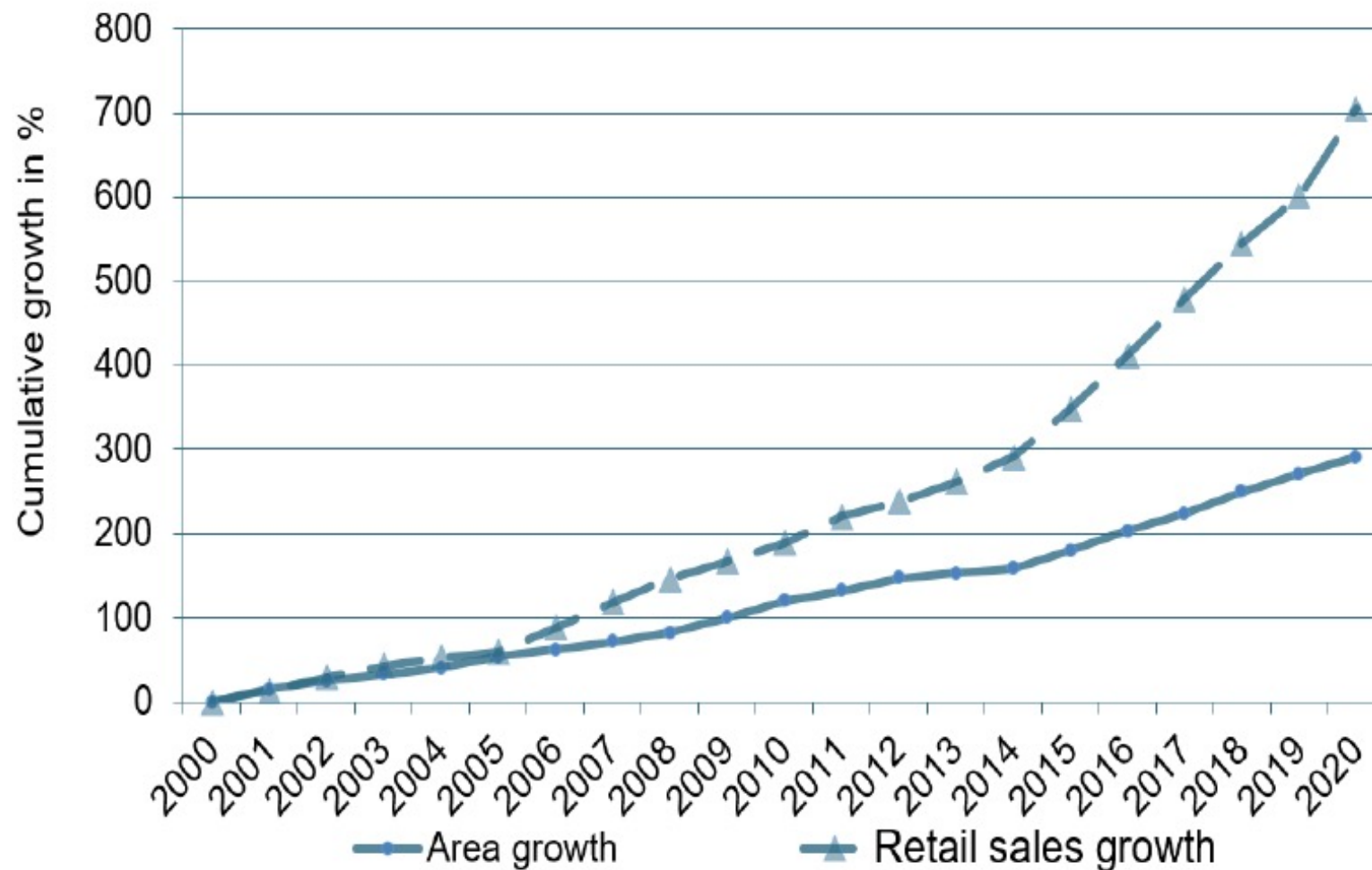
Evolución Precio Almendra 2020



Source: Lonja de Albacete, 2022

European Union: Growth of organic area and retail sales 2000-2020 compared

Source: FiBL-AMI surveys 2006-2022



Challenges and Opportunities: Organic Inputs in the EU

European Input List

European
Input List



FiBL

EU LIST - SEARCH

NATIONAL LISTS

SUBMIT PRODUCTS

BACKGROUND

SITE INFORMATION

Information for farmers

READ MORE

<https://www.inputs.eu/>

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European Input List

Private label requirements

Private label A

Private label B

Private label C

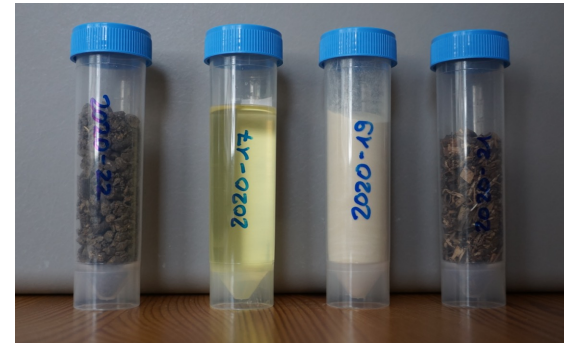
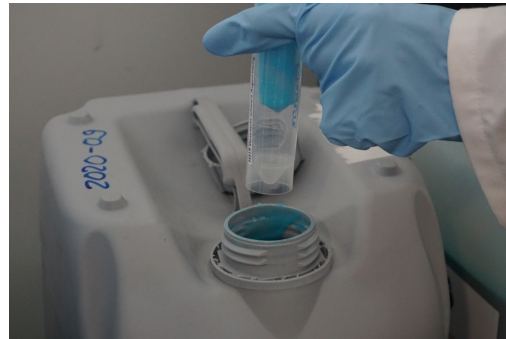
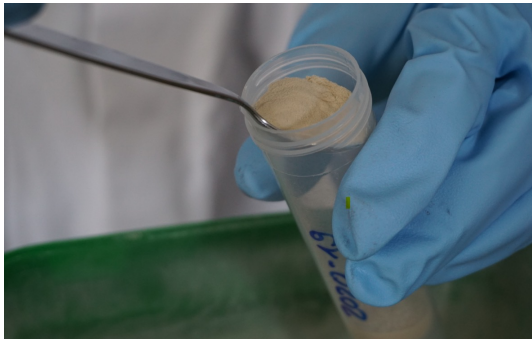
National requirements

National laws

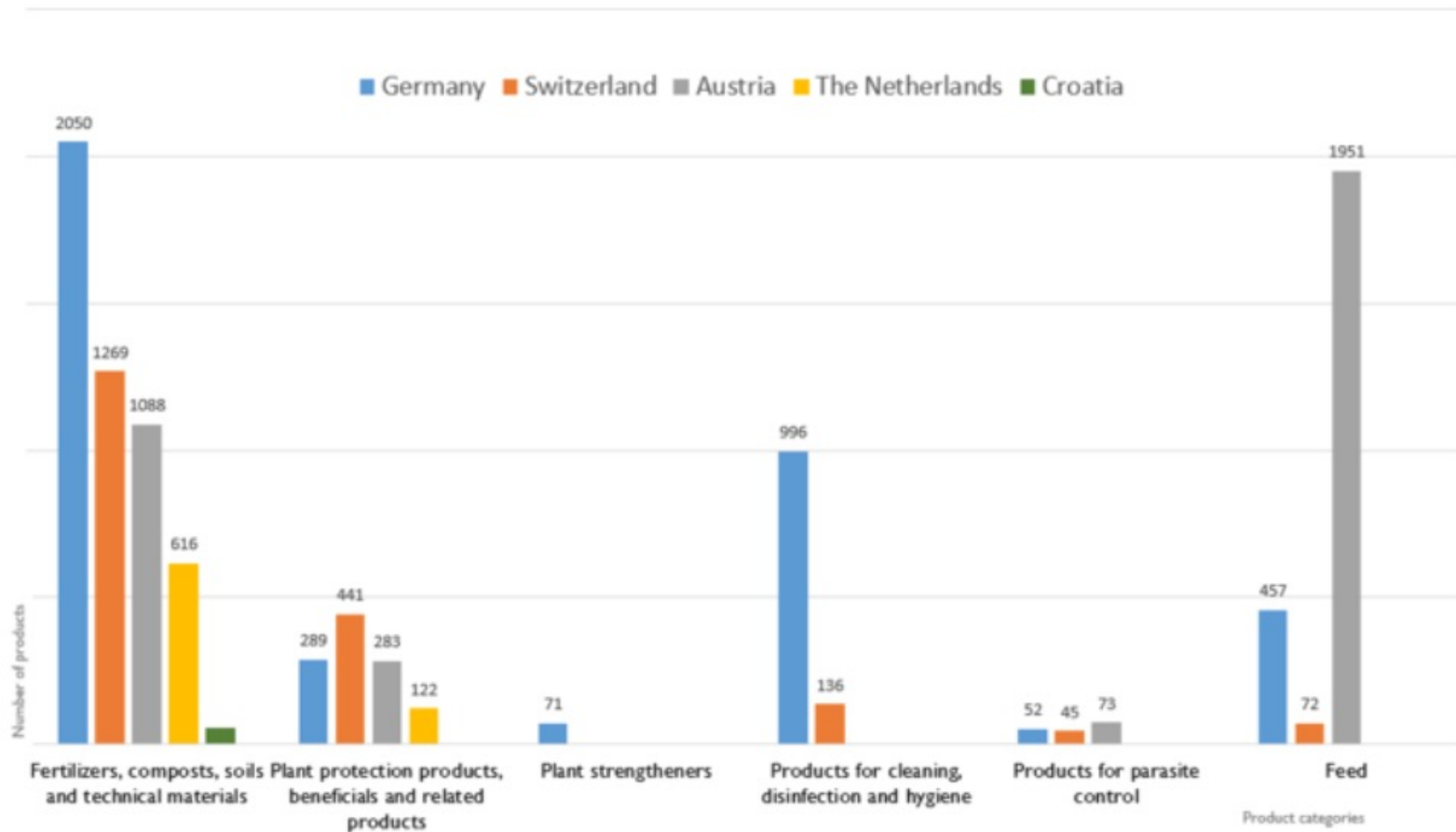
Basic requirements

European Input List criteria

EU-legislation

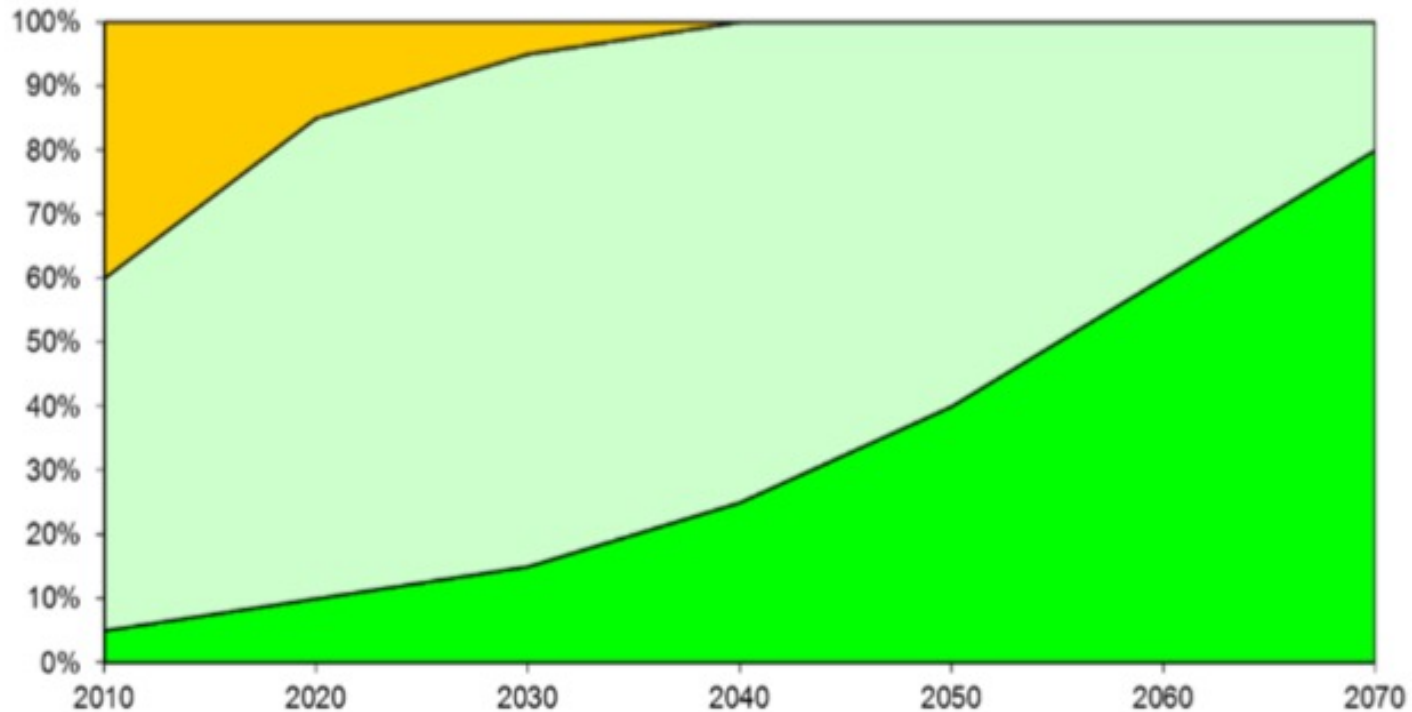





European Input List



Challenges and Opportunities: Organic Breeding in the EU

Plant material for organic agriculture (OA)



-  organically bred cultivars
-  conventional bred, propagated under organic conditions
-  conventionally bred & propagated, but without seed treatment

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

Organic Breeding – Organic Seeds databases

The screenshot shows the top navigation bar of the organicXseeds website. It features the logo 'organicXseeds' in blue and a language selector 'en'. Below the logo are four main search and account sections: 'Quick search' with input fields for 'Crop' and 'Variety'; 'Category search' with a 'Choose category' dropdown; 'Supplier search' with a 'Supplier' input field and a 'Show all suppliers' link; and 'My Account' with 'Username' and 'Password' input fields, a 'Forgotten password?' link, and a blue arrow button. A large orange banner below the navigation bar reads 'Welcome to OrganicXseeds Ireland, the official Irish database of organic seed availability'. To the right of the banner is a red 'Menu' button with a right-pointing arrow. Below the banner, a paragraph explains the database's regulatory basis (EU Regulation EC No. 834/2007 and 889/2008) and its funding by the Department of Agriculture, Food and the Marine and the Soil Association. A box on the right contains links for 'New to organicXseeds?' and 'How To Register'.

The screenshot shows the LIVESEED European database interface. At the top, the LIVESEED logo is on the left, followed by the text 'Interface to: organicXseeds'. On the right, there is a language selector with options 'de | fr | it | en | hu'. Below the header, a large heading reads 'Welcome to the European database for organic seeds'. A green-bordered box contains a message: '✓ Language successfully changed'. To the right is a 'Login' section with 'Username' and 'Password' input fields, a blue arrow button, and links for 'Forgotten password', 'Home', 'Search for organic seed supplier', and 'Register as organic seed supplier'. The main content area is divided into two columns. The left column, titled 'Objectives of the European router database', describes the database's development within the EU project LIVESEED and its goal to increase transparency and supply of organic seeds. The right column, titled 'Financing through LIVESEED', provides contact information for FIBL Germany, including a telephone number and an email address. A note at the bottom of the right column asks users to contact support if they experience difficulties.

<https://www.organicxseeds.com/international/countryselect>

Organic Breeding – ECO-PB



[ABOUT ECO-PB](#)

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[RESOURCES](#)

[CONTACT](#)



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About ECO-PB

OBJECTIVES

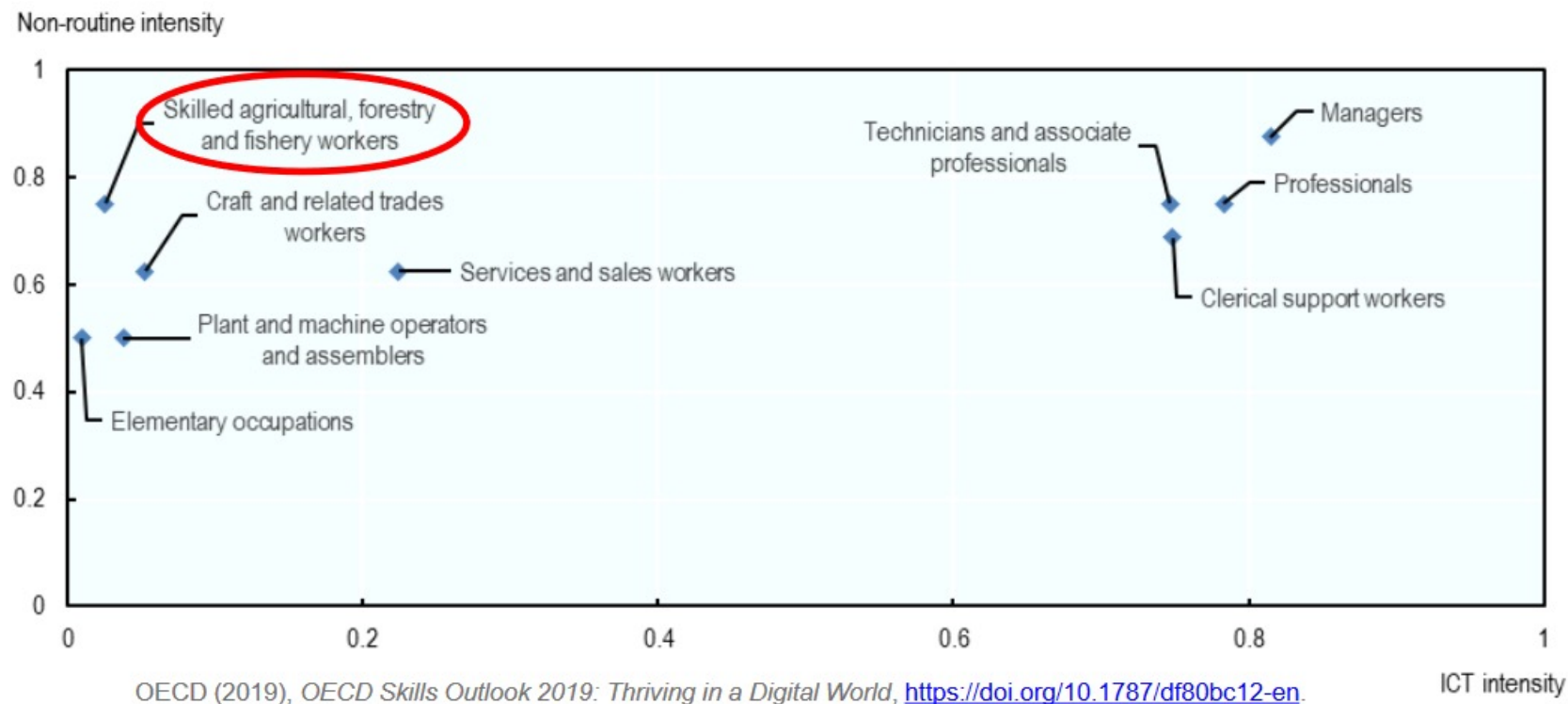
The European Consortium for Organic Plant Breeding (ECO-PB) was founded in 2001 with the aim of promoting organic plant breeding and building up an independent expertise. As a non-profit

FiBL

www.fibl.org

Challenges and Opportunities: The Digitalization of Organic farming

Digital skills for farmers



Digital skills for farmers

Farmers need cross-cutting skills to benefit from digital technologies:

- Cognitive and analytical skills
- Basic ICT skills
- Awareness and trust on digital tools for support decision-making
- Navigating internet safely
- Softs skill

Digital opportunities for farmers

Digital technologies for Farmers:

- Mobile devices for access to management and advisory services
- Integrated digital farm (e.g. in-field sensors, farm machinery, IoT)
- Access to knowledge sharing platforms, including vocational training

Interaction with governments and businesses in value chains:

- Digital services (e.g. payment services)
- Access to information (e.g. product prices and standards)

EU Agricultural Digitalization Framework



CAP Article 6.1.b) enhance market orientation and increase competitiveness, including greater focus on research, technology and digitalisation;

Thank You

Contact

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<http://www.fibl.org/en/fibl-europe-en>