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# How to improve collection on organic agriculture in the countries of Central and Eastern Europe

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# About this presentation

- Organic agriculture in the European Union
- Organic agriculture in the EU and the CEE countries: area, producers, market
- Trends
- Data situation
- Discussion

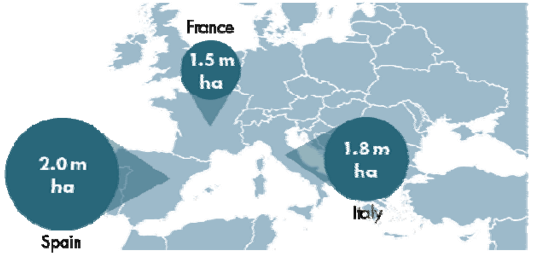
# Introduction: FiBL data collection on organic agriculture: Scope and method

- Annually, the Research Institute of Organic Agriculture FiBL collects data on key indicators of organic agriculture in European Union such as area, production and trade data among national data sources (for trade data) and Eurostat (for area, production and operator data; Eurostat 2018).
- Data are compiled in a MySQL database, and quality checks are carried out following the ORMACODE of the EU-funded OrganicDataNetwork (OrganicDataNetwork et al 2014), much of which is based on Eurostat's Statistics Code of Practice (Eurostat 2011).
- Checks include the comparison against the previous year, the neighbouring countries, and the overall total. In case of inconsistencies, data providers are asked for clarification.
- FiBL publishes the data annually in collaboration with IFOAM - Organics International in a statistical yearbook (Willer & Lernoud 2018).

# Organic Agriculture in the European Union 2016

## Organic Farmland 2016

Top 3 countries (largest organic area)

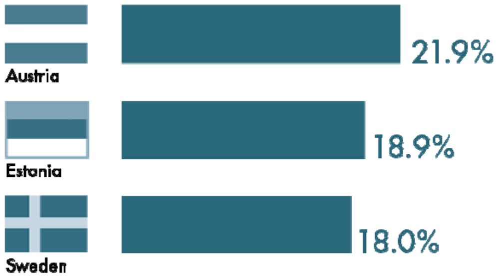



**12.1 m ha** Organic farmland in million hectares

**+8.2%** From 2015

**6.7%** Organic share of total farmland

### Organic share of total farmland: Top 3 countries




## Organic Producers & Processors 2016

The number of organic producers is increasing

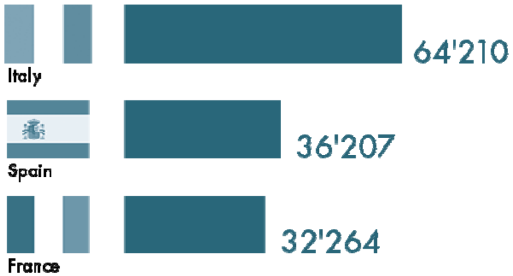
**295'123** Organic producers

**+9.7%** From 2015

**62'652** Organic processors

**+7.8%** From 2015

### Number of producers: Top 3 countries




## Organic Market 2016

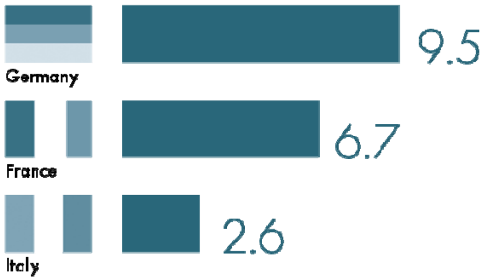
The European market is growing

**30.7** EU organic retail sales in billion euros

**60.5 €** Per capita spending

**+12%** Organic market growth

### Organic retail sales: Top 3 countries (in billion euros)




Ireland: 21.8% Organic market growth

Denmark: 9.7% Market share

Denmark: 227 € Highest per capita spending is in Denmark

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Source: FiBL survey based on national sources



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More information: www.organic-world.net

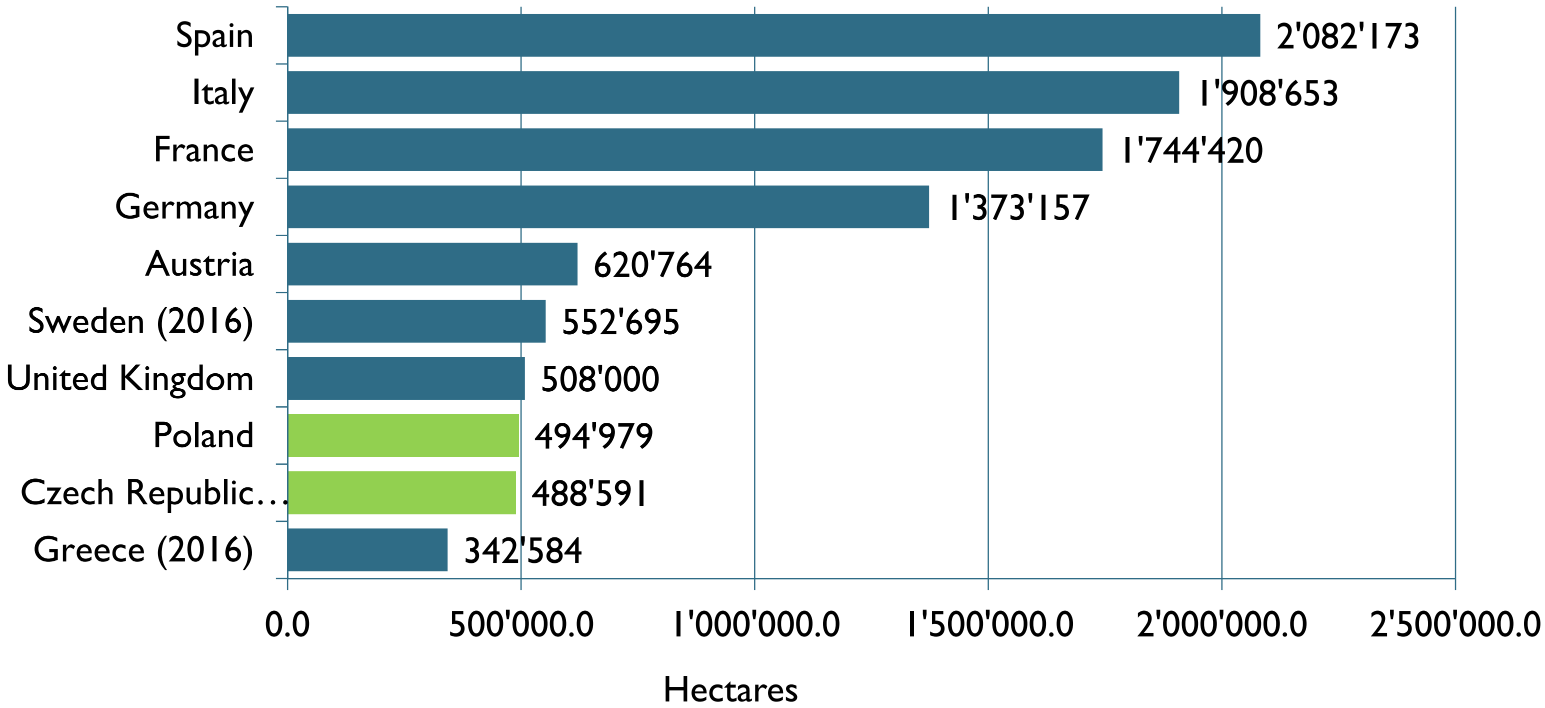
# Key data 2016 EU CEE countries

- Area
  - Almost 2.6 million hectares = 21% of the EU's organic farmland (12.1 million hectares)
  - Change 2015/2016: + 5% (EU: +8%).
  - 5.1% of total farmland (EU: 6.7%)
- Producers
  - Approx. 64'000 (EU: Approx. 300'000)
  - Change 2015/2016: + 4% (EU: +10%).
- Retail sales
  - At least 500 million euros (EU: 30'700 million Euros).

# Organic farmland: Top 10 EU countries (total ca. 13 million ha)

**European Union: The ten countries with the largest organic area 2017. Green: EU-CEE countries**

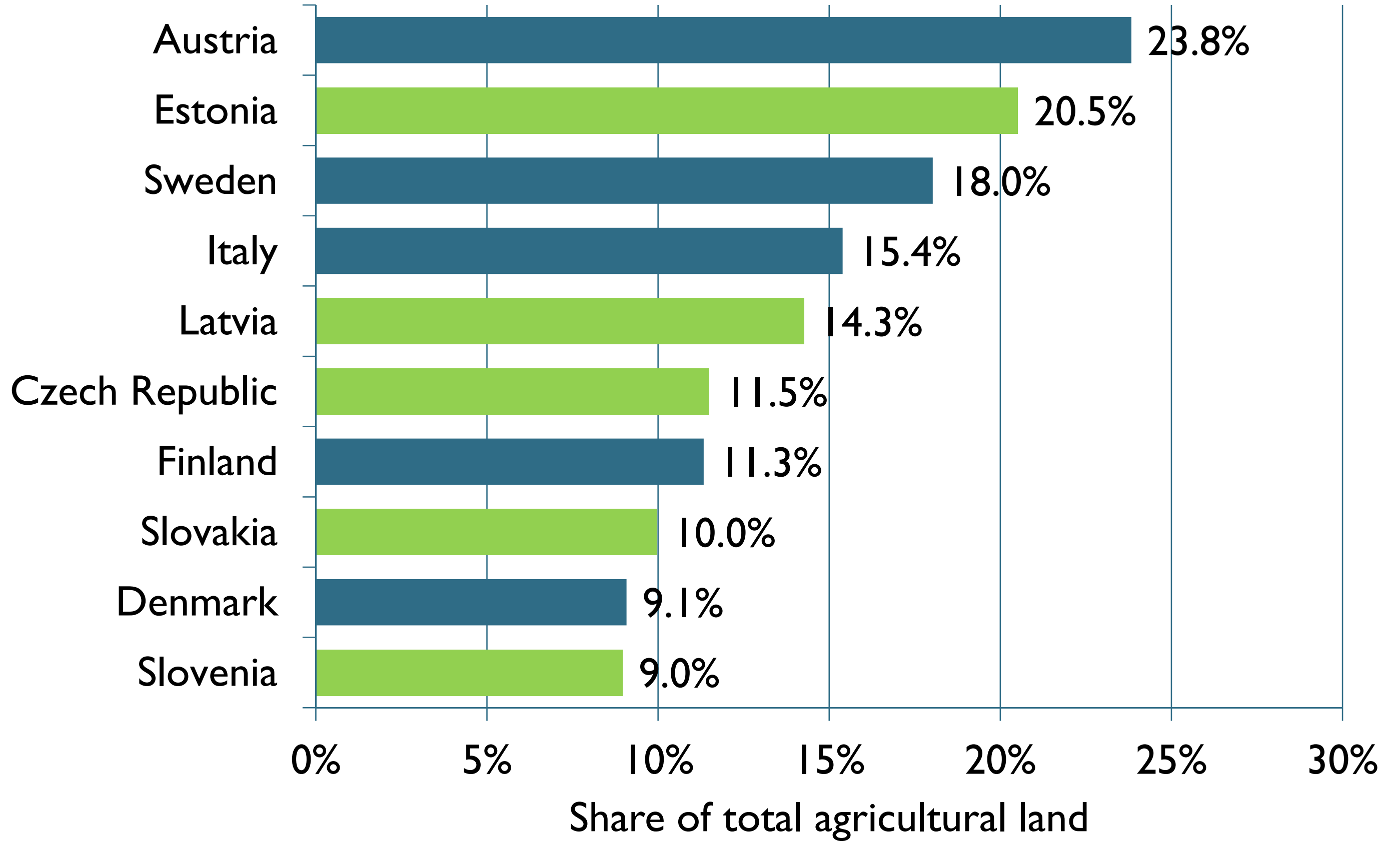
Source: FiBL-AMI survey 2018, based on national data sources and Eurostat



# Top ten countries organic area shares

## European Union Countries with organic shares of at least 10 percent 2017. Green: EU-CEE countries

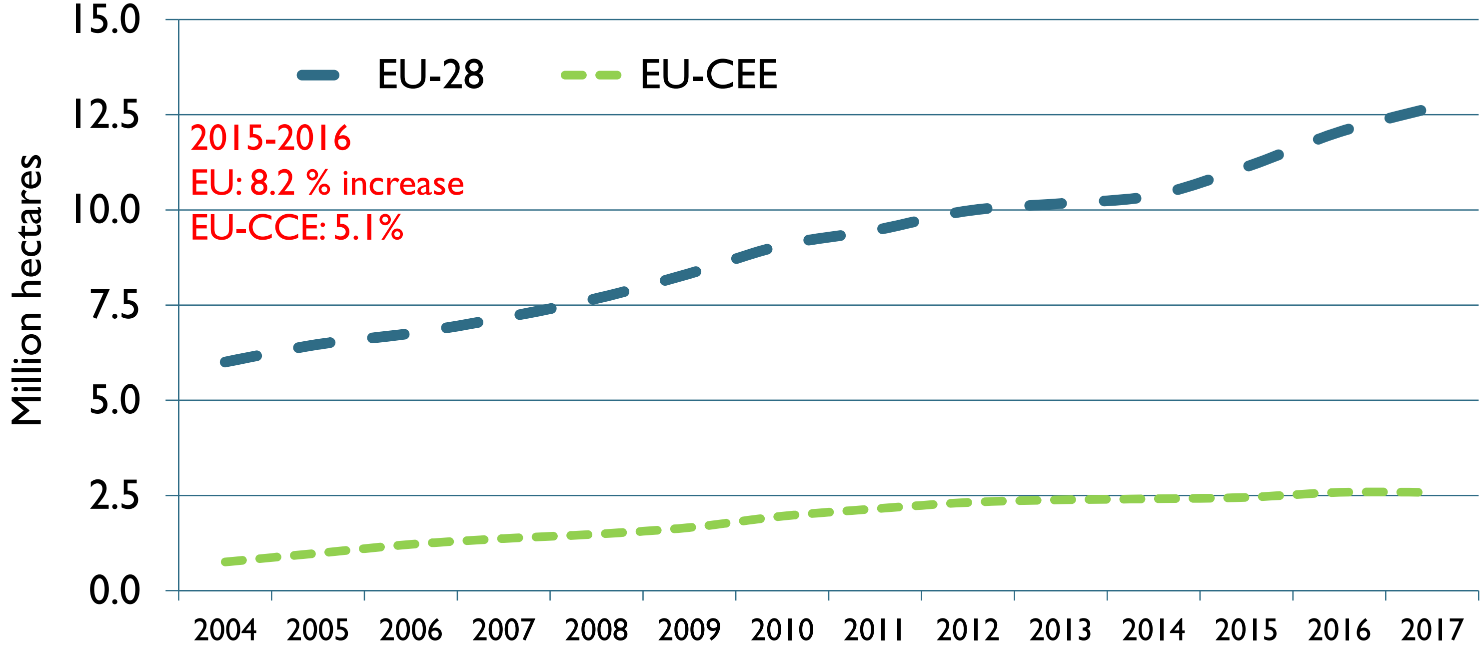
Source: FiBL survey 2018



# Organic area growth

## European Union + EU-CEE: Development of organic agricultural land 2004-2016

Source: FiBL-AMI survey 2018, based on national data sources and Eurostat

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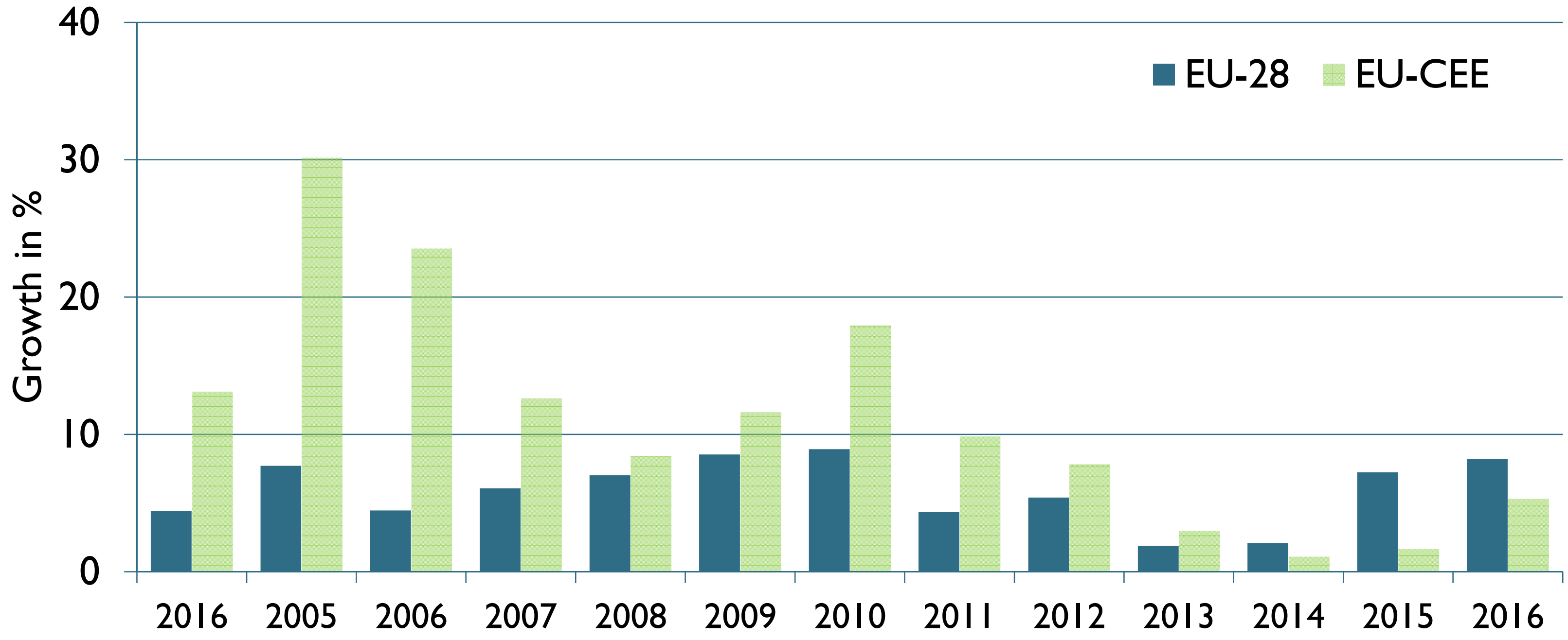
# Organic area growth

## EU and EU CEE: Growth rates of organic agricultural land 2004-2016

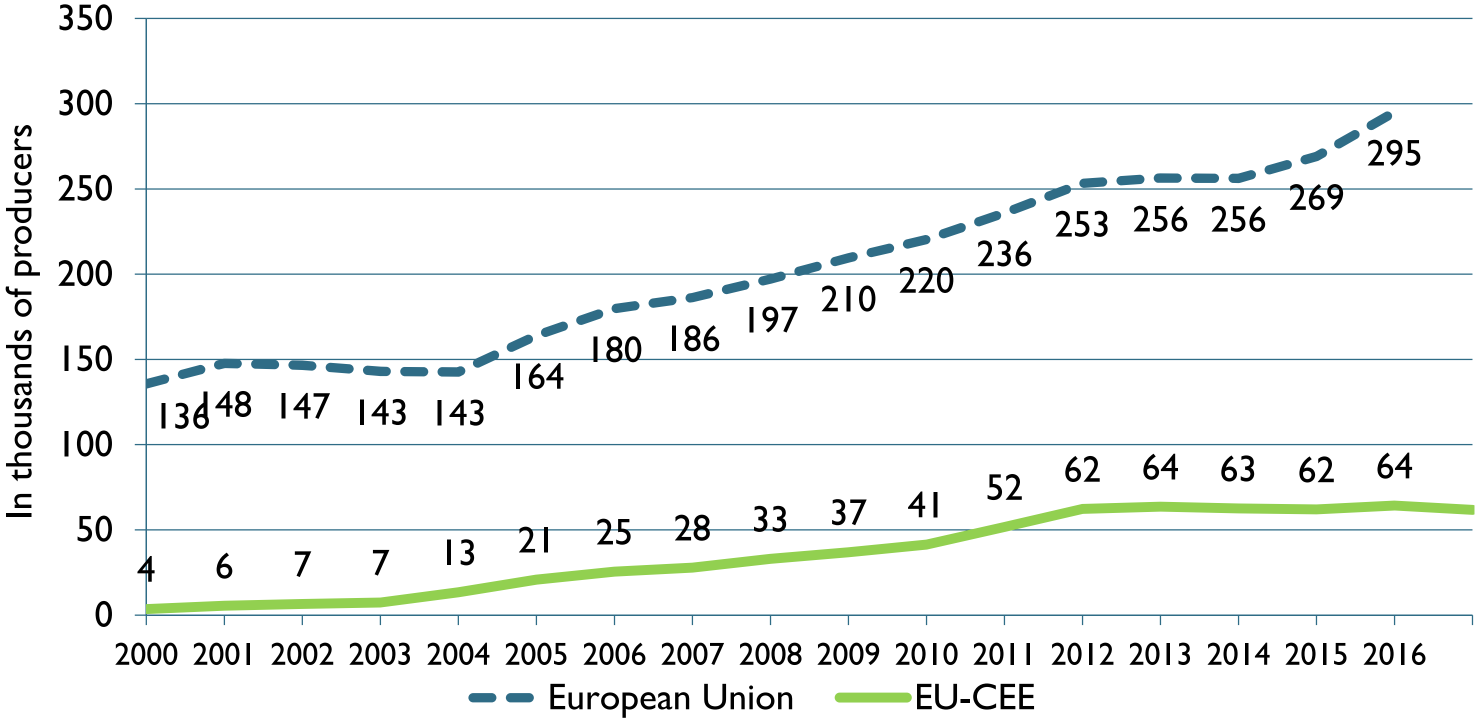
Source: FiBL-AMI survey 2018, based on national data sources and Eurostat



# Growth of organic producers

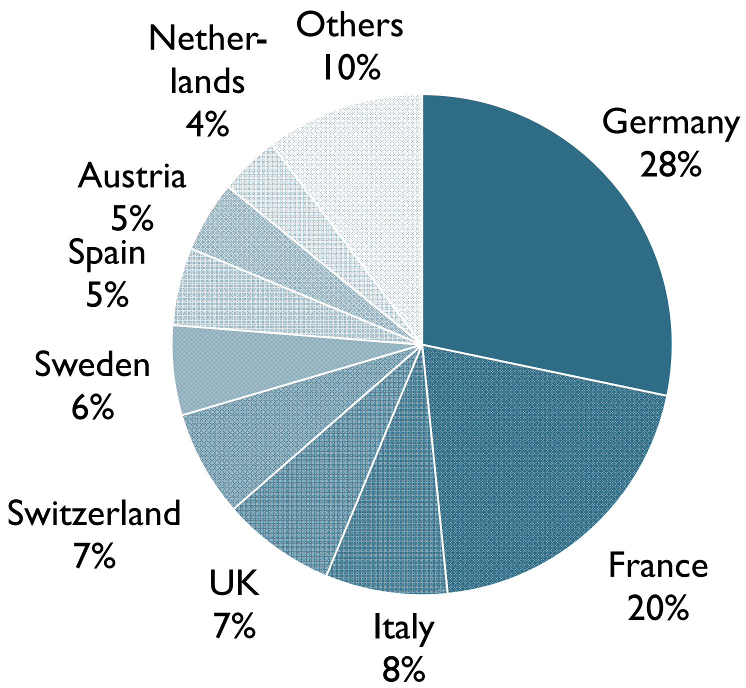
## EU and EU CEE: Development of organic producers 2000-2016

Source: FiBL-AMI surveys 2006-2018 based on national data sources and Eurostat

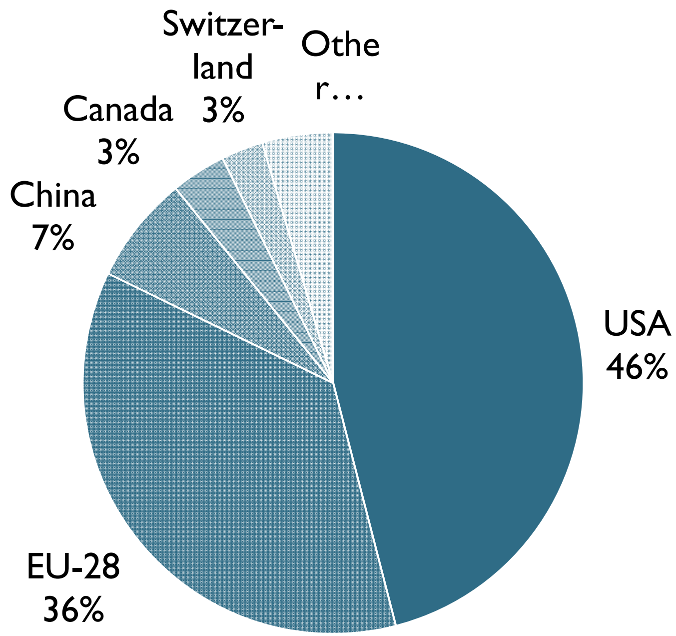


# Distribution of retail sales in Europe and worldwide

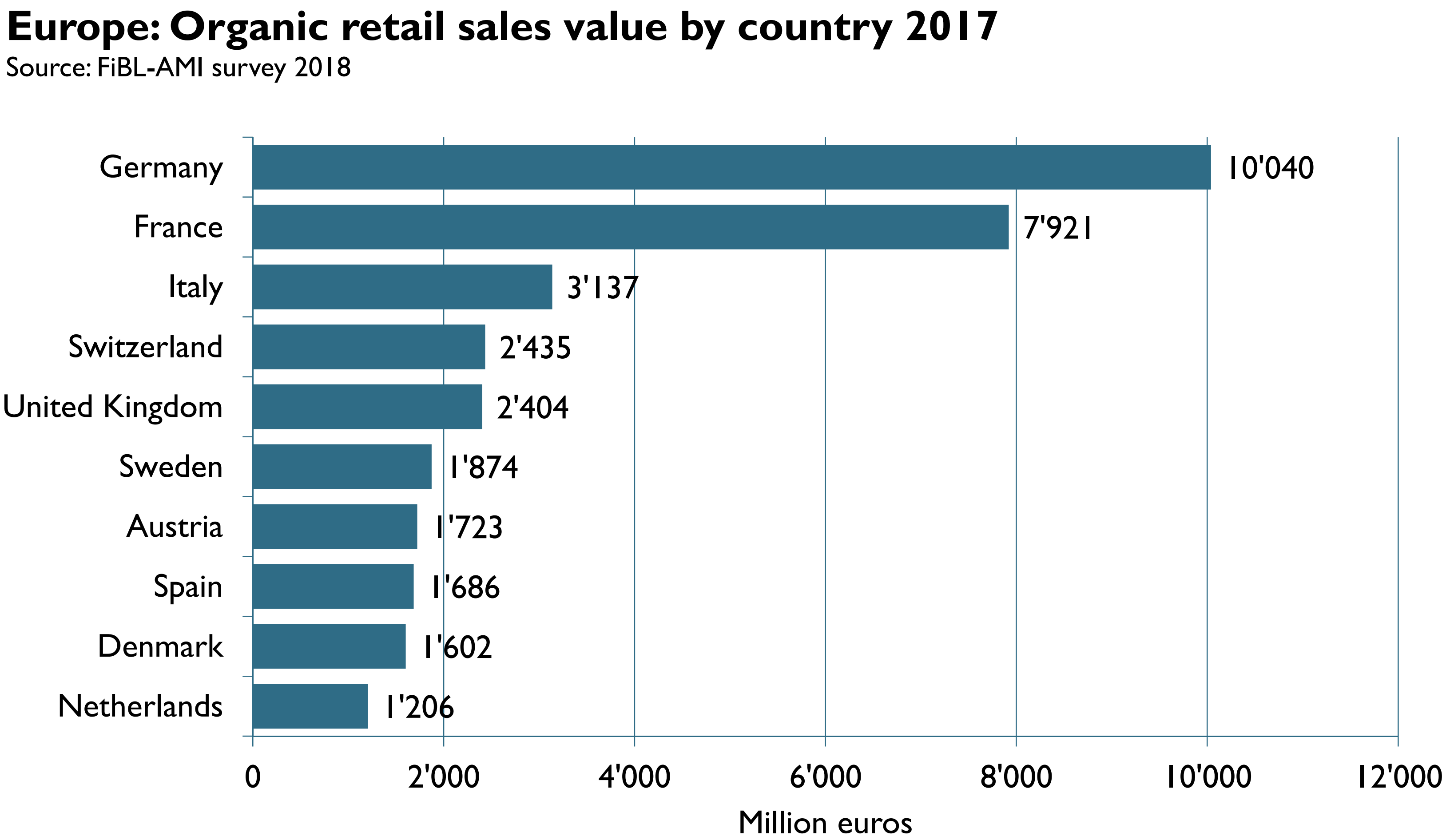
**Europe: Distribution of retail sales by country 2016**
Source: FiBL-AMI survey 2018




**World: distribution of retail sales by single market 2016**
Source: FiBL-AMI survey 2018



# Organic retail sales: Top ten countries

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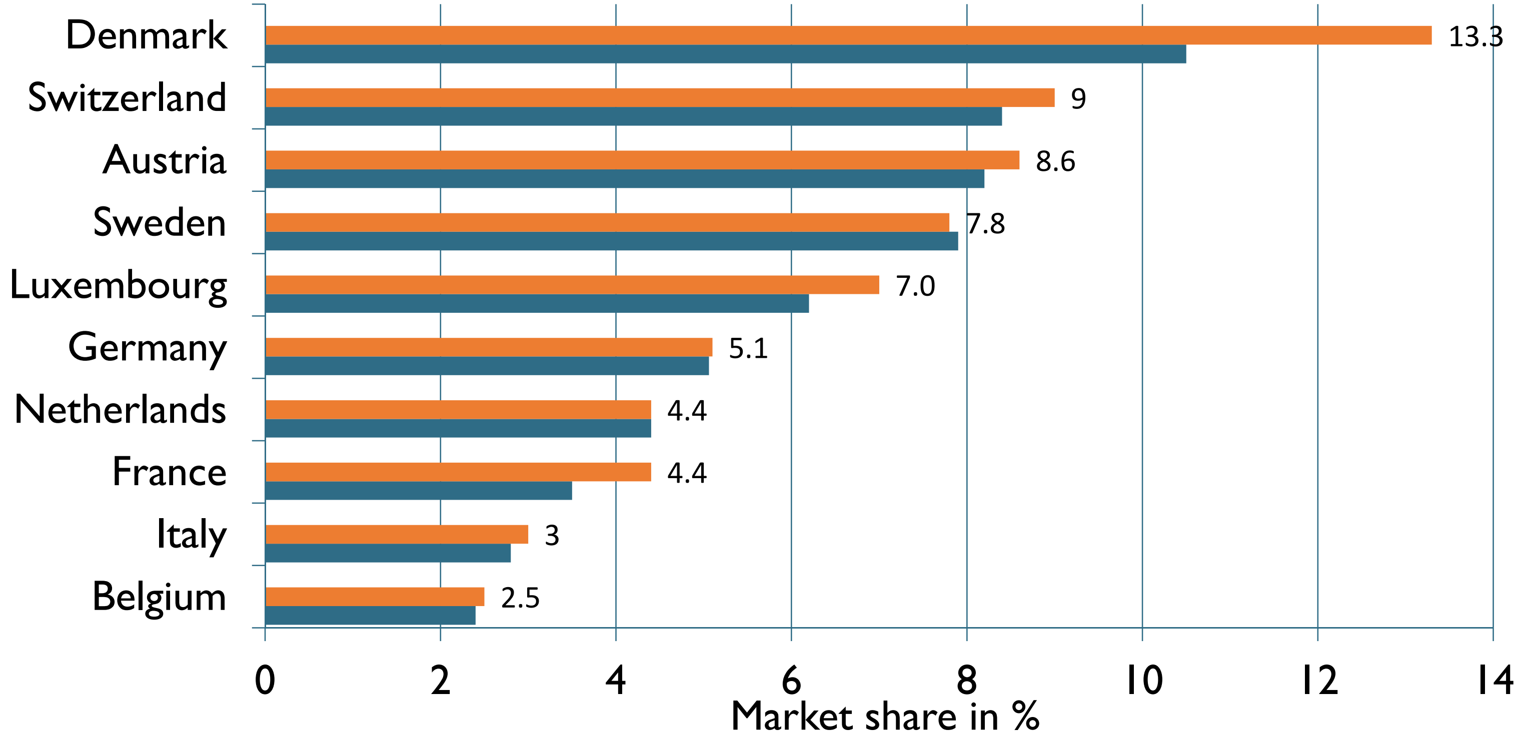
# Highest organic market shares

## Europe: The countries with the highest organic shares of the total market 2016-2017

Source: FiBL-AMI survey 2018 based on national data sources

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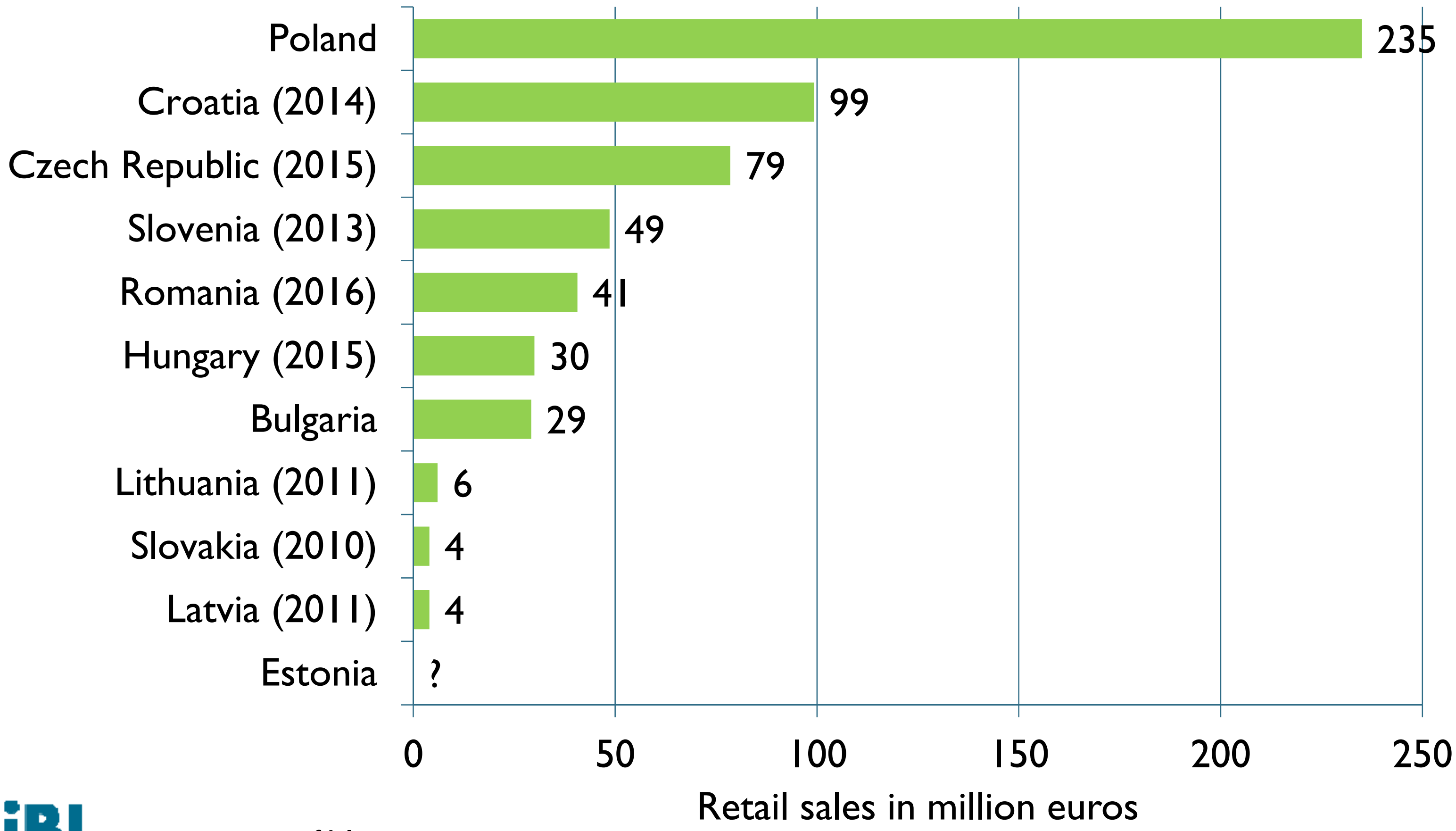
# EU-CEE: The largest markets for organic food

## EU-CEE Retail sales for organic food 2017

Source: FiBL-AMI survey 2018 based on national data sources

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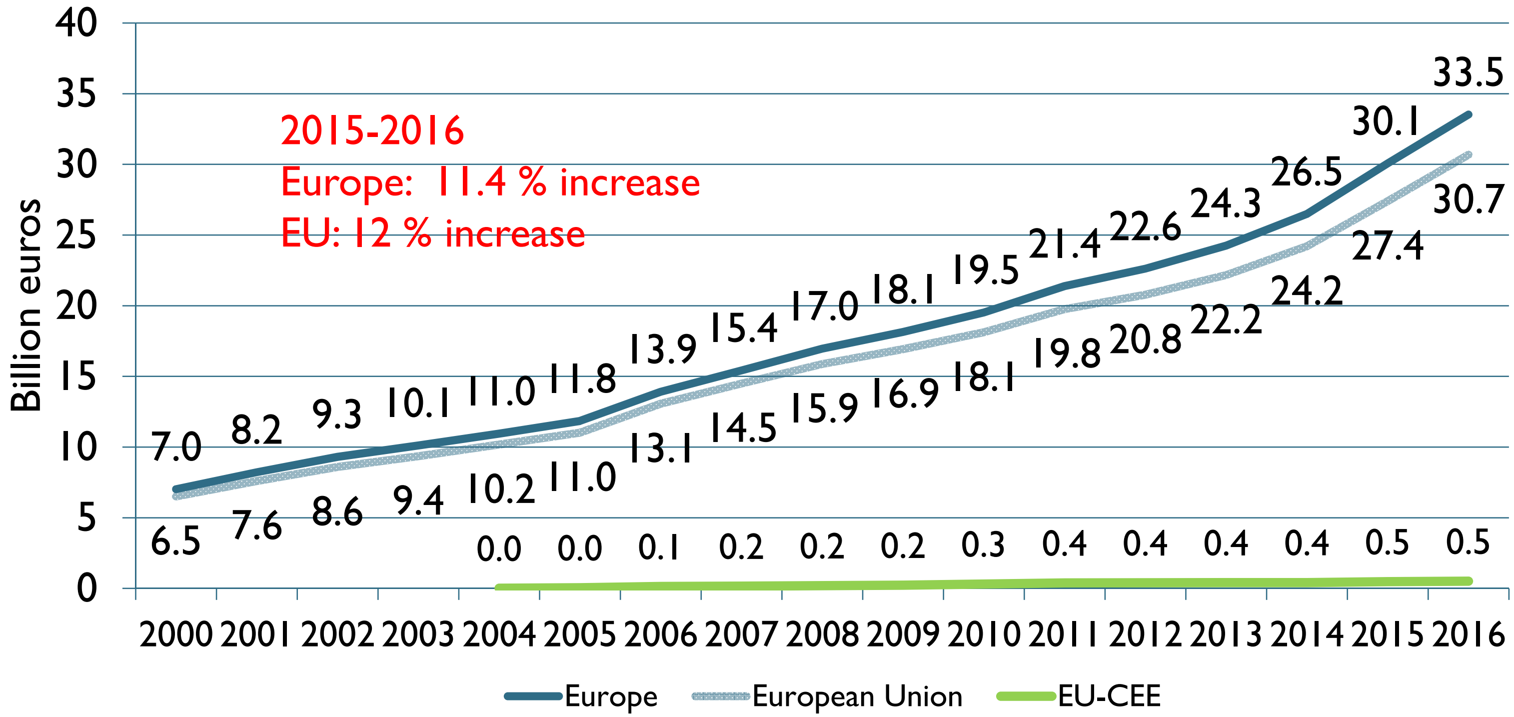
# Development of organic retail sales

## Development of retail sales 2000-2016

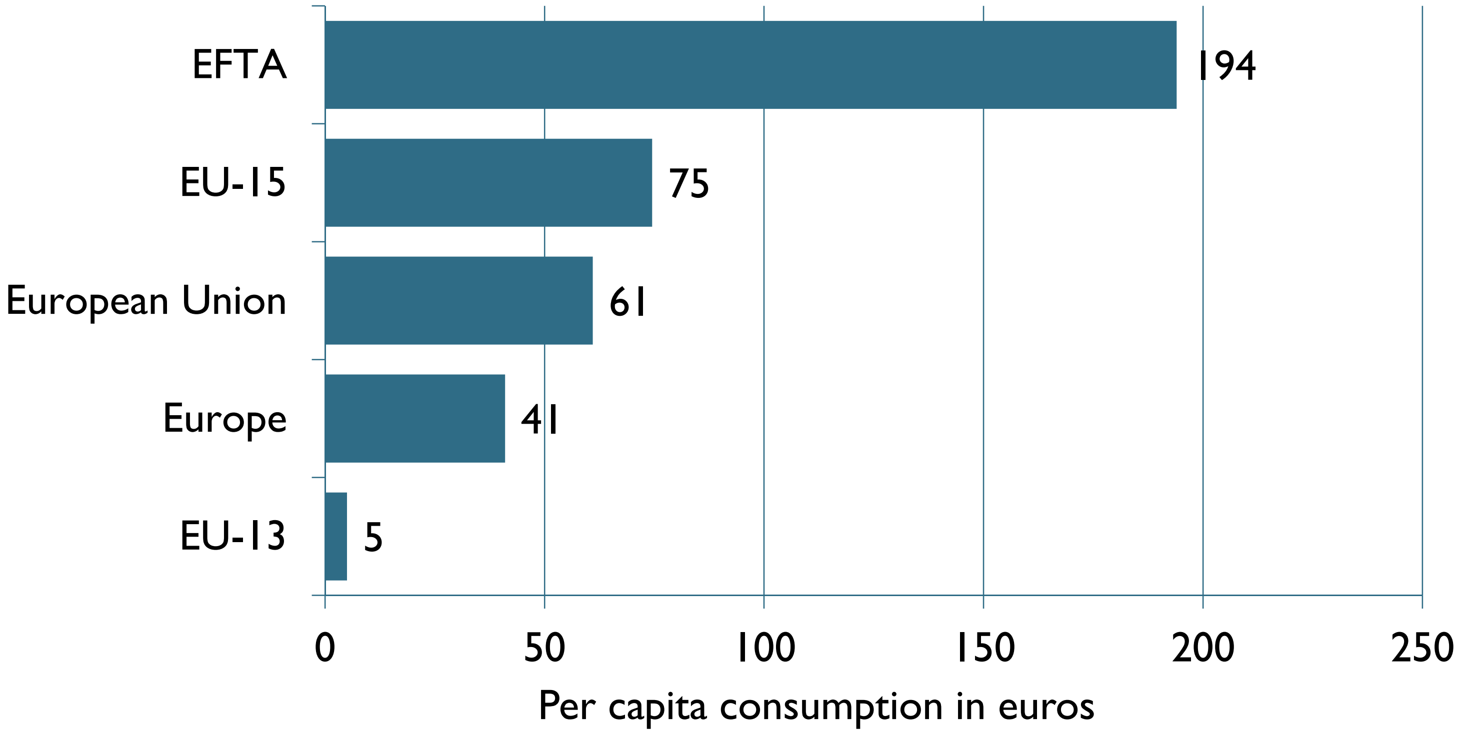
Source: FiBL-AMI Surveys 2006-2018, OrganicDataNetwork Surveys 2013-2015



# Europe:  Per capita consumption

## Europe: Per captia consumption 2016 by country group

Source: FiBL-AMI survey 2018

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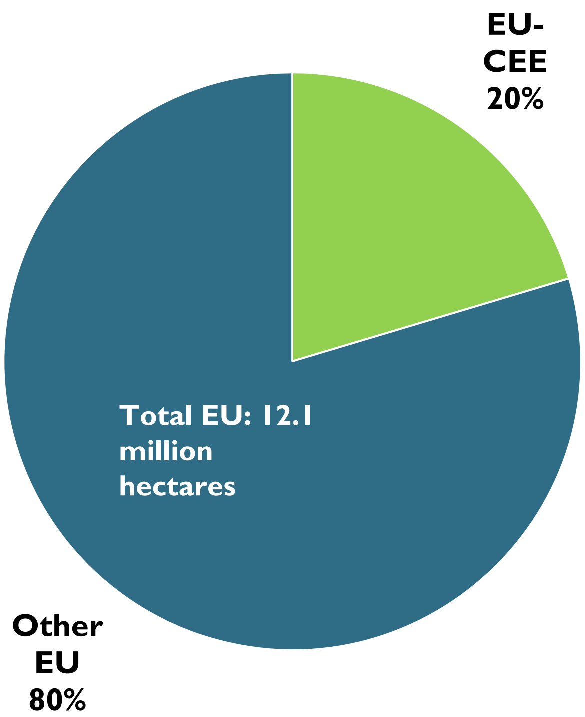
# Distribution area, producers, market 2016

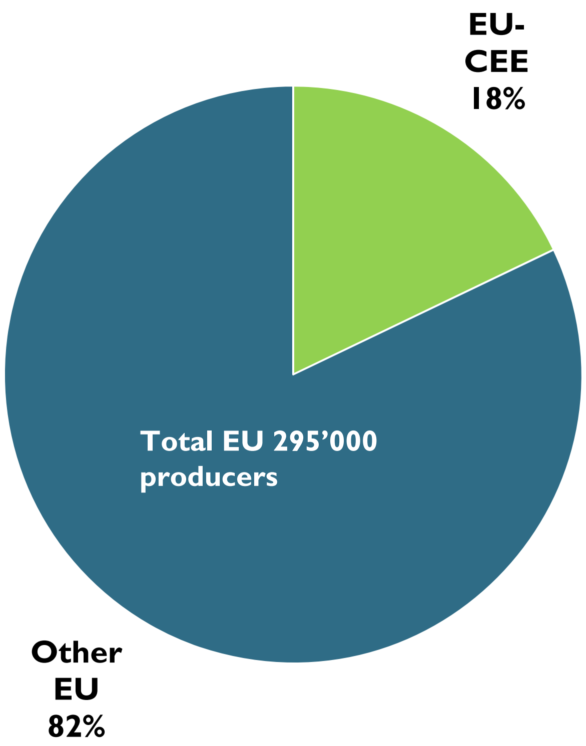
## EU and EU CEE: Area distribution

Source: FiBL-AMI survey 2018



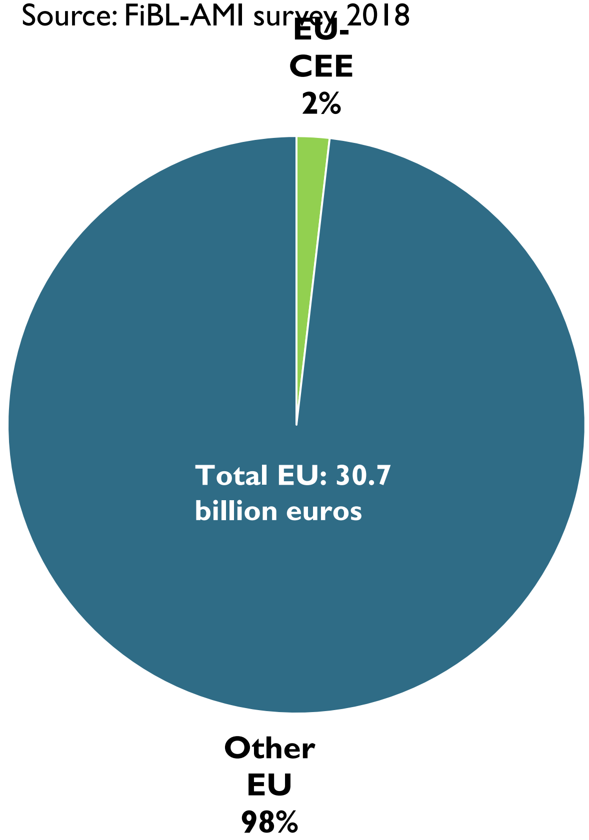

## EU and EU CEE: Producer distribution

Source: FiBL-AMI survey 2018




## EU and EU CEE: Retail sales distribution

Source: FiBL-AMI survey 2018



# EU CEE trends

- Strong increase of the organic area in most countries after 2004
  Reasons
  - Rural Development programmes
  - Access to the EU market and export opportunities
- However: Domestic market was not a driver for the strong area growth in the 2000s
- In the past 2 or 3 years: Market grew stronger than the area (probably); area growth slowed down.

# Barriers to market development in the CEE countries

- Lack of processing infrastructure
- Processed products are imported and therefore expensive
- Insufficient cooperation among producers and therefore value chains are often underdeveloped
- The market can often not be supplied with products in sufficient quality and quantity
- Due to lack of organisation among producers, fresh products are only available on open markets, which means products are often quite expensive
- Purchasing power not so high
- Producer information not as developed as in other EU countries due to lack of information campaigns/action plans

# Current market trends in the EU CEE countries

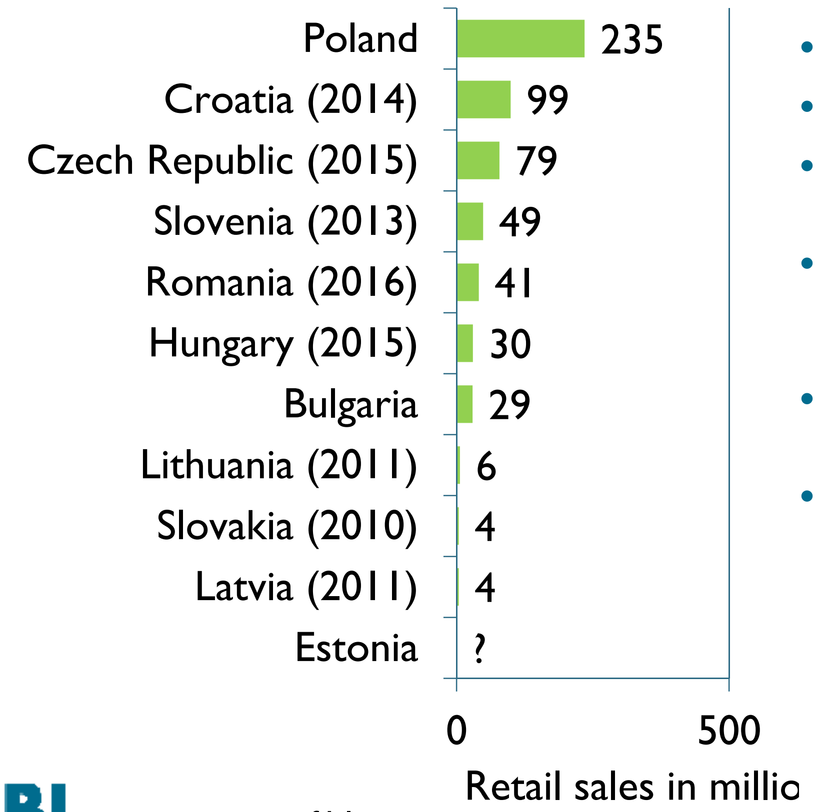
Currently there are indications that the market is growing faster than in the past due to

- Increasing purchasing power
- Better offer of organic products in supermarkets
- More points of sale
- Better information of consumers
- Improved processing facilities, which are is partly supported under the rural development schemes
- Local supply available due to strong area growth in the past
- We expect that the market continues to grow and that with a growing market, also the area will grow faster again.

# Data challenges for total retail sales

## EU CEE Retail sales for organic food

Source: FiBL-AMI survey 2018



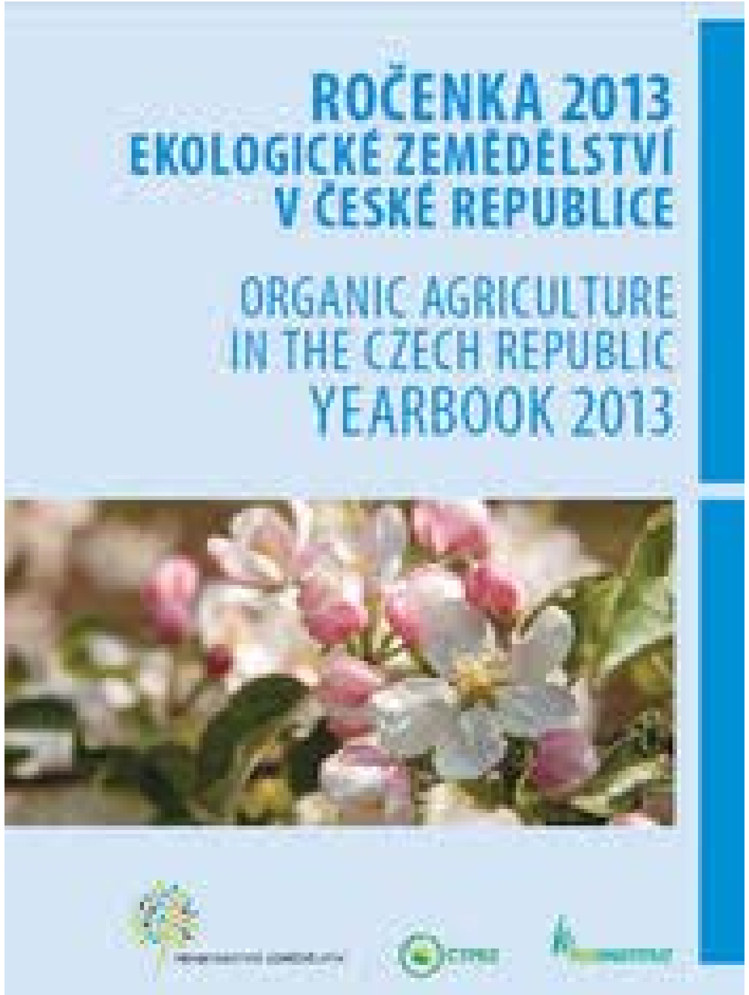

- Only few countries have a permanent collection system
- Contacts for the activities are missing
- Data is not regularly updated
- Data is old in some cases
- Data is not available at all
- Data is not complete (e.g. only packaged food)
- Data is collected with a different methods ranging from guessimates to surveys
- Often collection method and source is not clear
- EU CEE data often communicated/collected by external players: USDA, Ekokonnect, Euromonitor

# Market trends?

- How big is the market really?
- How much did it grow in the past and does it currently grow?
- What products do consumers buy?
- Does the market offer opportunities to market actors, be it producers, importers or exporters?
- What are the trends?

Whereas the availability and accessibility of area and operator data is good, no country, except for the Czech Republic, has a permanent collection system for trade data.

# Example from the Czech Republic




- All data are collected under one system, mandated by the Czech Ministry of Agriculture
- Area, operator, production data are provided to Eurostat
- Retail sales and export data (including product details) are collected among retailers and further marketing channels

# Better data on organic markets – current gaps in most EU countries

- Retail volumes/quantities by product are available only for a few countries
- Retail sales values (EUR) by product are available for many countries, however, in most cases not the total market is covered (e.g. only supermarket sales)
- Export and import volumes and values by product are, with a few exceptions, virtually non-existent
- Also total exports and imports are not available for most countries
- No clear data available on demand at the product level for many countries and not at all on a EU level

- Lack of retail sales, import and export volumes means that traceability of products and fraud detection based on data is not possible.

# Better organic market data – what measures ?

- Set up market data collection systems for all countries
- Include organic market data collection into systems, where similar data are already collected
- Make governmental support available for private sector activities
- Harmonize data collection methods and classifications with collection systems in other countries
- Establish basic quality and plausibility check routines
- Set up a CEE/European network for organic market data for information exchange and mutual learning

# Conclusions

- The data show that, currently, the organic production countries is developing at a slower pace in the EU CEE countries than in the EU as a whole
- The development of the organic area and production in the past decade (currently slowing down) was not matched by a similar development of the market or processing infrastructure.
- However, due to the many data gaps, it is not possible to draw a clear picture of the situation.
- There is a major need to improve data collection particular in the area of market and international trade data.

# Acknowledgements

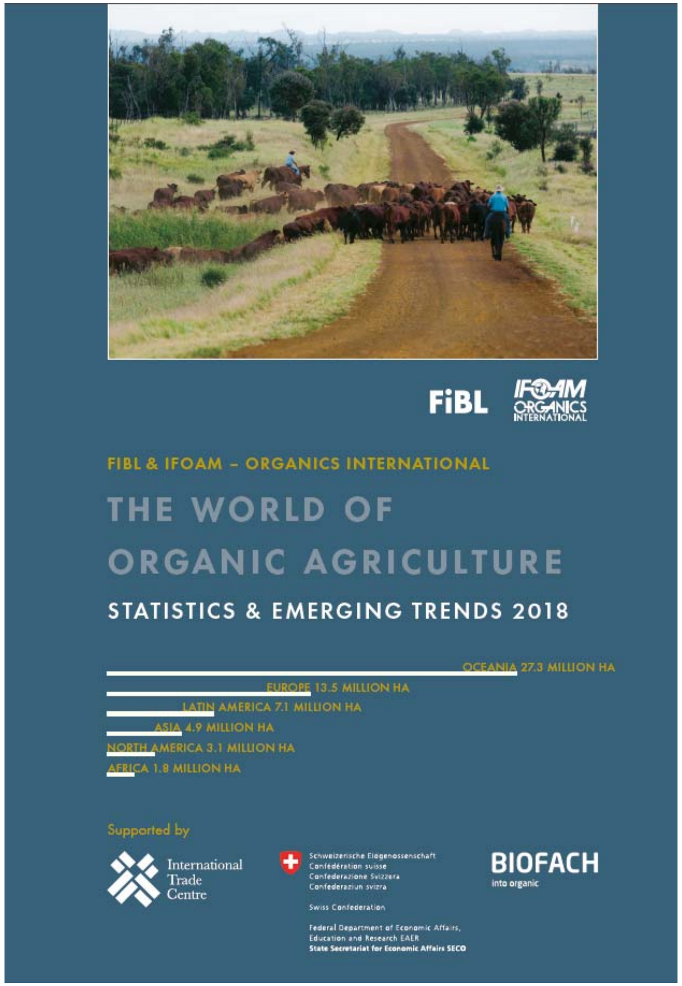
The work presented here is funded by the Swiss State secretariat for Economic Affairs and the International Trade Centre ITC, and it received funding from the European Union in the framework of the OrganicDataNetwork project (No. 289376), which ran from 2012 to 2014.

# Resources

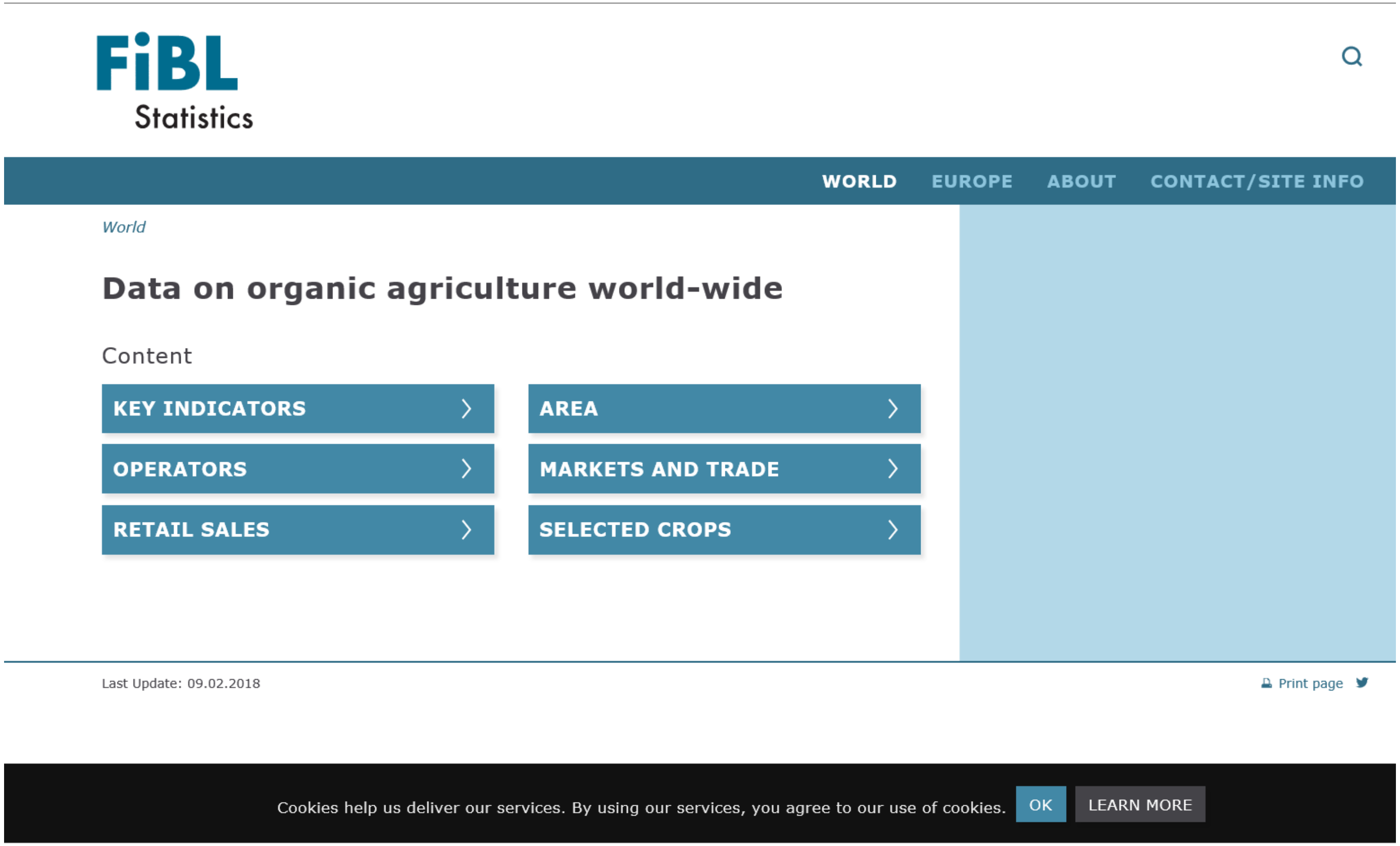
- «The World of Organic Agriculture» at www.organic-world.net
- Slides and infographics at www.organic-world.net
- Twitter.com/fiblstatistics
- Interactive data tables at statistics.fibl.org
- Interactive maps at www.organic-world.net
- Interactive map Organic in Europe at www.ifoam-eu.org

# The World of Organic Agriculture 2018
# www.organic-world.net

- The 19th edition of ‚The World of Organic Agriculture', was published by FiBL and IFOAM – Organics International in February 2018.
- Data tables, country and continent reports
- **Chapter on European production trends**
- Markets, standards, policy support
- **Supported by SECO, ITC, NürnbergMesse and IFOAM – Organics International**



# Statistics.FiBL.org



# Presentations at www.organic-world.net

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With the support of International Trade Centre

In cooperation with IFOAM Organics International, BIOFACH

## The World of Organic Agriculture at BIOFACH 2018

**The session on global organic farming and market trends will take place place from 4 pm to 4.45 pm, on February 14, 2018 at BIOFACH, NürnbergMesse, Nürnberg, Germany.**

(05/01/2018) At this session, the latest data on organic agriculture worldwide, regulations and organic markets will be presented and the 19th edition of The World of Organic Agriculture, the yearbook on global organic agriculture, will be launched.

### Presenter

> Markus Arbenz, Executive Director, IFOAM - Organics International, Germany

### Speakers

> Dr. Helga Willer, Research Institute of Organic Agriculture FiBL, Switzerland

> Julia Lernoud, Research Institute of Organic Agriculture FiBL, Switzerland

> Beate Huber, Research Institute of Organic Agriculture FiBL, Switzerland

> Amarjit Sahota, President Ecovia Intelligence, UK

> Barbara Jäggin, SECO, Swiss Cooperation Office, Switzerland

### Further information

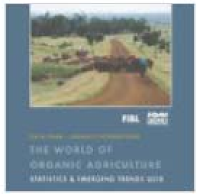
**Contact**

Helga Willer, FiBL, Frick, Switzerland

**Link**

> BIOFACH.de: The World of Organic Agriculture at BIOFACH 2018

**The World of Organic Agriculture 2018**



The World of Organic Agriculture 2018

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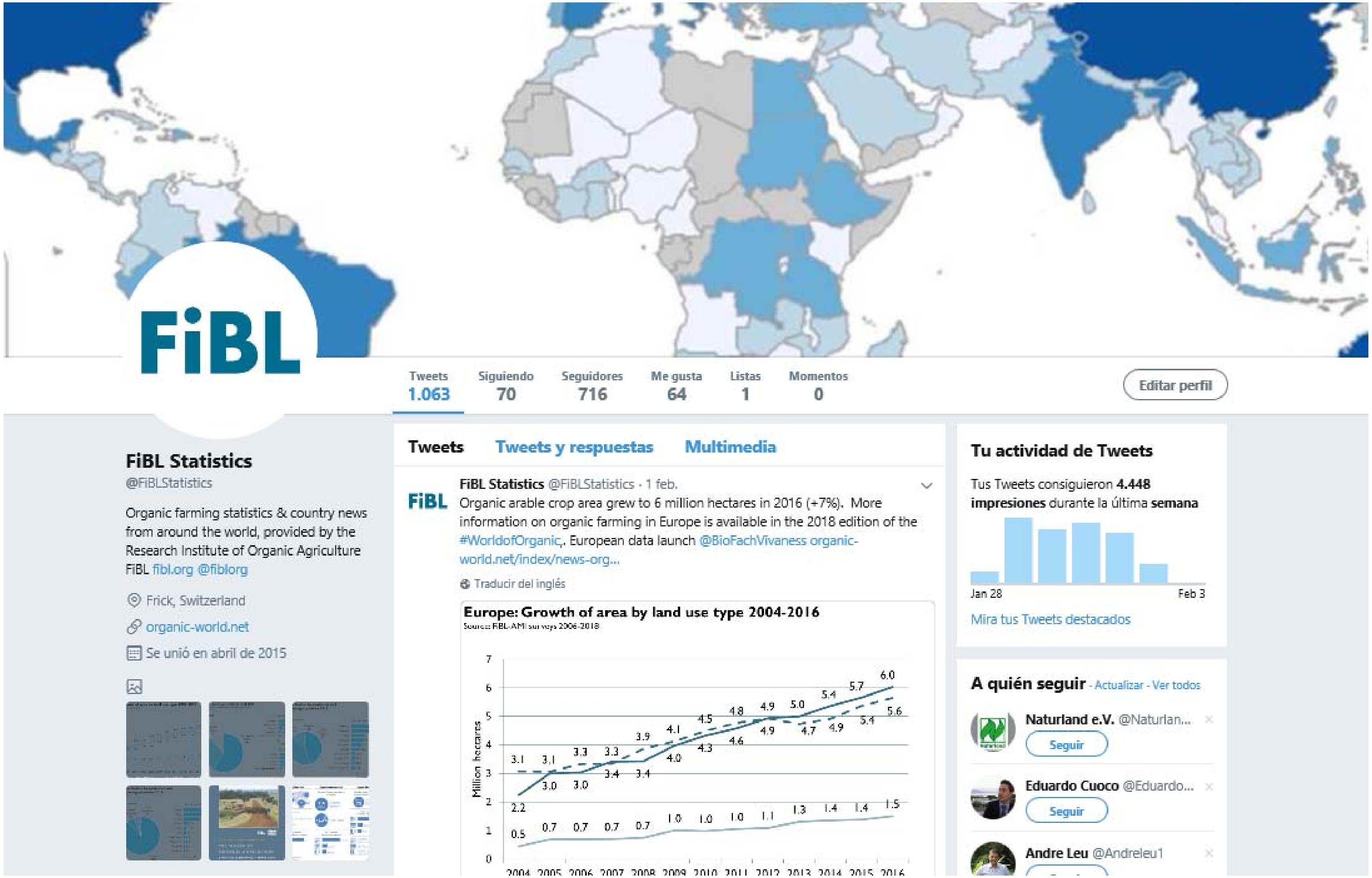

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