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Report Highlights:

After taking a dip in 2022, the EU organic market began to recover in 2023 as consumers' financial situations improved. France and Germany still have the largest organic markets in the EU and growth is expected in almost every Member State until 2025. Area under organic farming is anticipated to expand due to higher demand as well as the EU Farm to Fork Strategy, which sets out a target of 25 percent agricultural land under organic farming by 2025.

General Information:

Disclaimer: This report presents the views of the authors and does not reflect the official views of the U.S. Department of Agriculture (USDA). The data is not official USDA data.

Unless otherwise noted, “EU” in this report refers to the [EU-27](#).

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Summary

The United States (U.S.) - European Union (EU) organic equivalency arrangement went into effect on June 1, 2012. This streamlined trade between the world's two largest organic markets as it enabled organic food and agricultural products certified in the United States or EU to be labeled and sold as organic in either market. Due to a lack of organic specific HS codes, it is difficult to exactly track trade in these products.

After a large decrease in organic sales in 2022, the EU organic market began to slowly recover in 2023 with estimated sales of about \$50.4 billion. This is an increase of 10.5 percent from 2022. This increase is mainly due to consumers' economic recovery after years of high inflation. In general, the EU organics market has a loyal consumer base and remains quite resilient. FAS estimates that the EU market will continue to grow, albeit at a slower pace than before.

Germany and France remain the largest organic markets in the EU in 2023. FAS posts estimate that all organic markets within the EU will grow slightly in 2024 and 2025, except in Greece and Finland. For 2023, a 3 percent increase in organic agricultural area from 16.9 million hectares in 2022 to 17.4 million hectares in 2023 is estimated. The share of organic area will most likely grow in most member states due to higher consumer demand and government support.

High EU demand, combined with the equivalency arrangement, creates trade opportunities for U.S. exporters. The EU offers market potential for U.S. organic sweet potatoes, fresh produce, dried fruits and nuts, specialty grains, and processed products. U.S. exporters will compete primarily on quality and price, but there are also good opportunities for innovative and premium products.

U.S. companies have benefited from the long-term growth of the EU organic market, however precisely measuring trade in organics is difficult. Official trade data covers just a fraction of international commerce in organic products as organic-specific Harmonized System (HS) codes are limited and exist for only specific commodities. Existing HS codes primarily cover fresh organic products like milk, fruits, and vegetables, but do not currently exist for most processed products or organic nuts. In general, the actual total of U.S. exports of organic products to the EU is much higher than officially-tracked numbers show.

BioFach, the world's largest organic trade show, offers a unique opportunity for both new-to-market players and established companies to meet new contacts, gather trade leads, and learn about the global organic market. *BioFach 2025* will be held in Nuremberg Germany, February 11-14, 2025. *BioFach* is a USDA-endorsed trade show.

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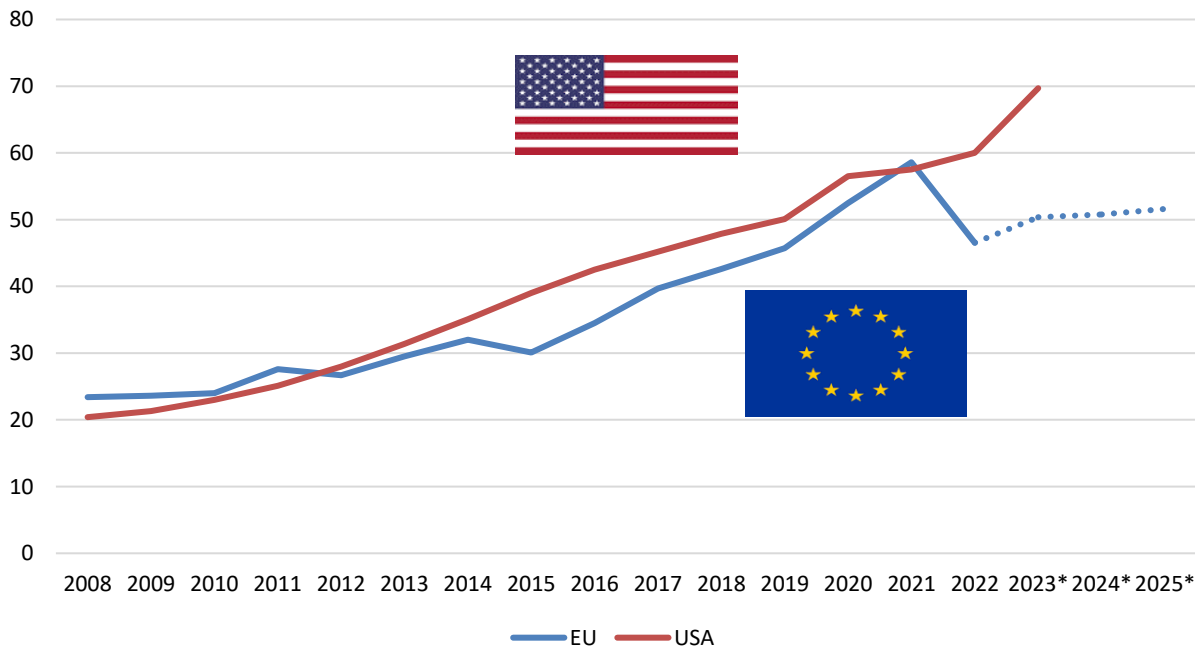
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Section I The EU Organic Agricultural Market and Production

The United States and the EU are the world’s largest organic markets. Both have shown tremendous growth rates in the last few years with the United States becoming the leading global organic food market in 2012. Both markets show a long-term upward trend.

Due to a lack of organic-specific HS codes¹ for many organic products, it is difficult to exactly track trade in these products. FAS offices in the EU estimate the EU organic market totaled \$50.4 billion (€48.8 billion) in 2023, which is a 10.5 percent increase from 2022. For 2024, FAS Posts estimate sales will grow at a slower rate reaching \$50.8 billion (€49.2 billion). In 2023, U.S. domestic sales of organic products reached a new record of \$70 billion, a 3.4 percent increase. Of these sales, \$63.8 billion are attributed to food sales.²

Figure 1: Organic Food Sales in the United States and the European Union



Source: Organic Trade Association, USDA/FAS Posts in EU, *USDA/FAS Posts in EU estimates

At the beginning of the COVID-19 pandemic, organic sales saw a boost, as consumers purchased more foods that they regarded as beneficial for their health as well as more sustainable and environmentally friendly. In 2022, this changed quite drastically because most EU member states experienced high inflation and lower disposable income. Since 2022, demand for organic products has become more volatile, with organic sales declining for the first time since 2014.³ In 2023, the market began to recover, and sales increased slightly. FAS Posts estimate a modest upward trend in EU organic sales for 2024 and 2025, but at a slower pace than before 2022. The recovery is attributed to the recovering EU economy, which is stimulating consumer purchases of more organic food and beverage products. Additionally, increased prices (increased sales value), increasing popularity of store organic brands, and a larger presence of organic products in discount supermarkets are anticipated to support higher organic sales.

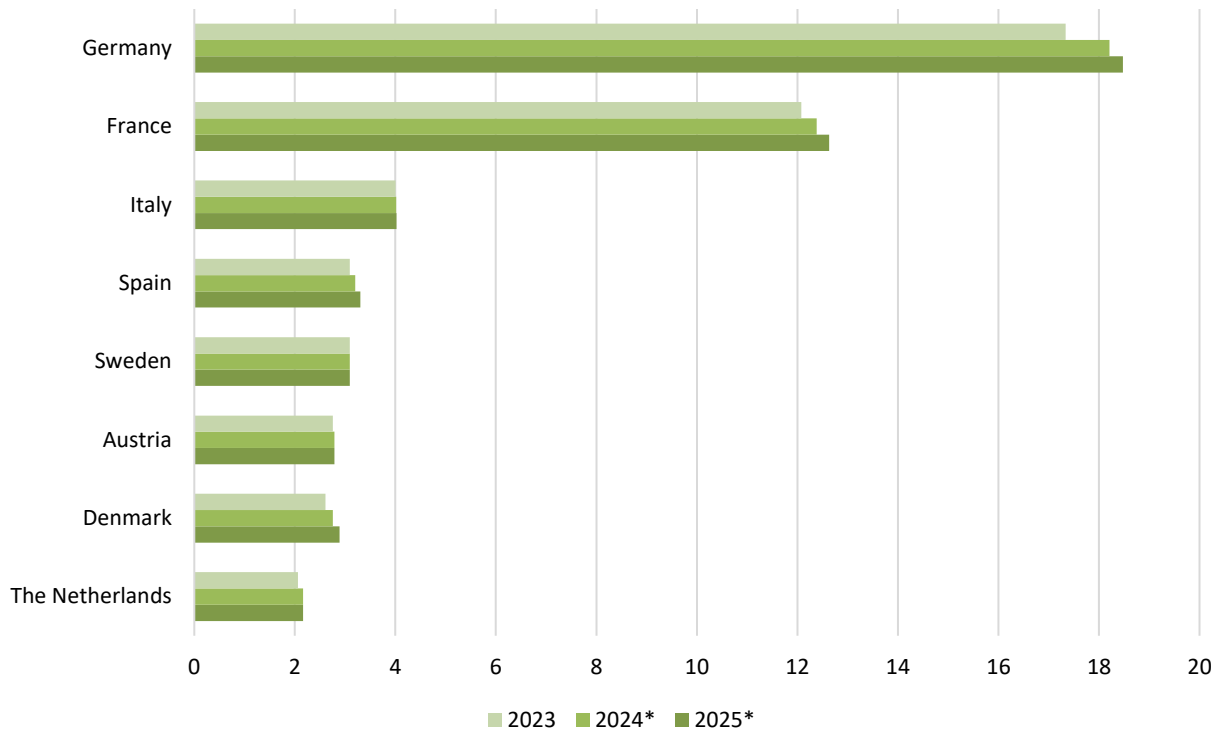
¹ The Harmonized Commodity Description and Coding System, also known as the Harmonized System (HS) is a standardized international system to classify traded products.

² <https://ota.com/market-analysis/organic-industry-survey/2024-organic-industry-survey>

³ <https://www.eea.europa.eu/en/analysis/indicators/agricultural-area-used-for-organic>

Due to a general shift towards increased health awareness in the EU, there has been a surge in the demand for food that is perceived as especially healthy, such as organic food. An increase in vegan, vegetarian and flexitarian diets has also driven demand. Many experts agree that a large increase in organic production is also highly dependent on government backing and support. This is given in the EU through the Farm to Fork Strategy. For more information on policies, please see Section III and IV.

Figure 2: Largest Organic Markets in the EU (in \$ billion)



Source: USDA/FAS Posts in EU, 2024* and 2025* are USDA/FAS Post estimates

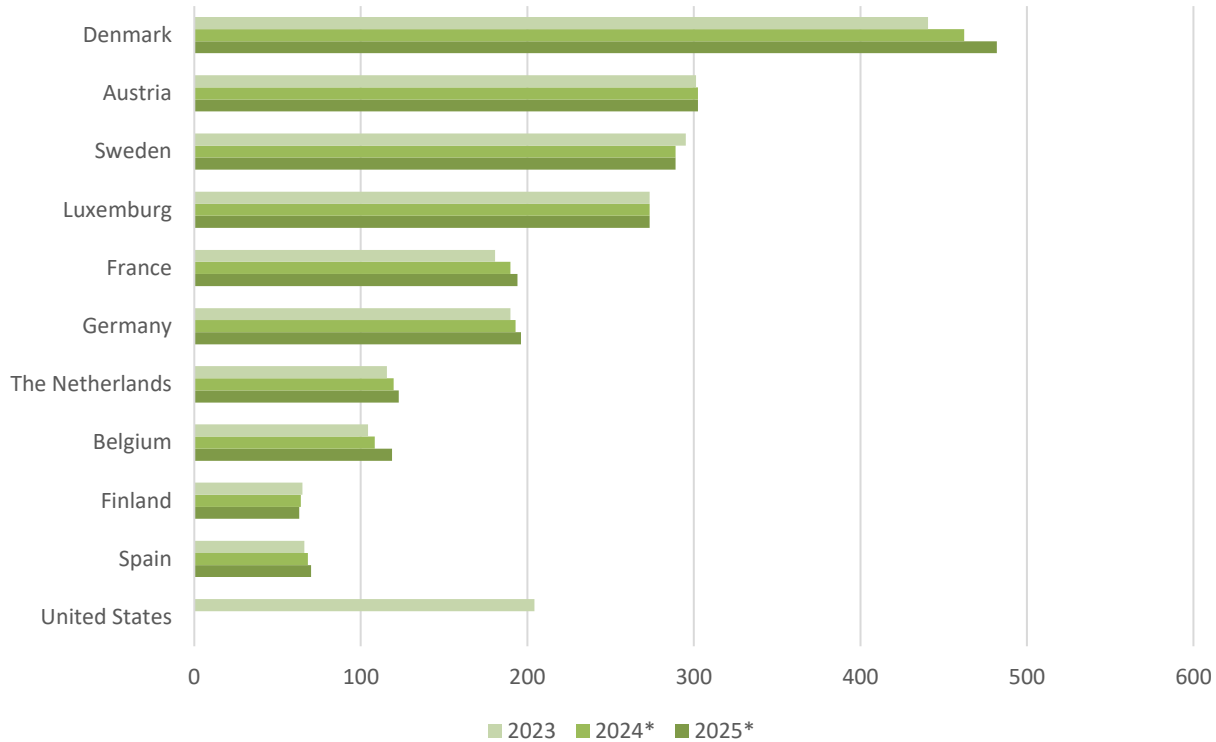
Final numbers for 2024 are not yet available at the time of writing. FAS Post data from 2023 shows that most markets in EU member states grew in comparison to 2022. The largest EU organic markets are predicted to continue to grow in 2024 and 2025. Very slight downward trends are expected in Finland and Greece due to worsening economic conditions for consumers.

An important driver behind the organic market in the EU is the predominance of large full-range supermarket chains. These chains place organic products on the shelves next to conventional products, resulting in greater availability of organic products for a larger audience. Specialty organic stores also play an important role as they become more professional, open more storefronts, and offer a wider assortment of organic products than regular full-range supermarkets. The distribution of organic products differs considerably between member states. In Denmark, Sweden, Germany and Austria, full-range supermarkets dominate the distribution of organic products. In Italy, the Netherlands, France, Belgium, Poland, and Lithuania, the share of full-range supermarkets and organic specialty shops is more evenly distributed.

In 2023, the countries with the highest organic sales per person and year (totaling \$100 or more) were Denmark, Austria, Sweden, Luxemburg, France, Germany, the Netherlands, and Belgium. Expenditures for organic products vary significantly throughout the EU. While there are countries with very high per capita expenditures for organic

products, there were about 10 member states, mainly in Eastern Europe, with sales of less than \$10 per person. At \$204.2, the United States has the fifth largest expenditures per capita in comparison to EU Member States.

Figure 3: Highest Organic Food Sales per Person in the EU (annual per capita, in \$)



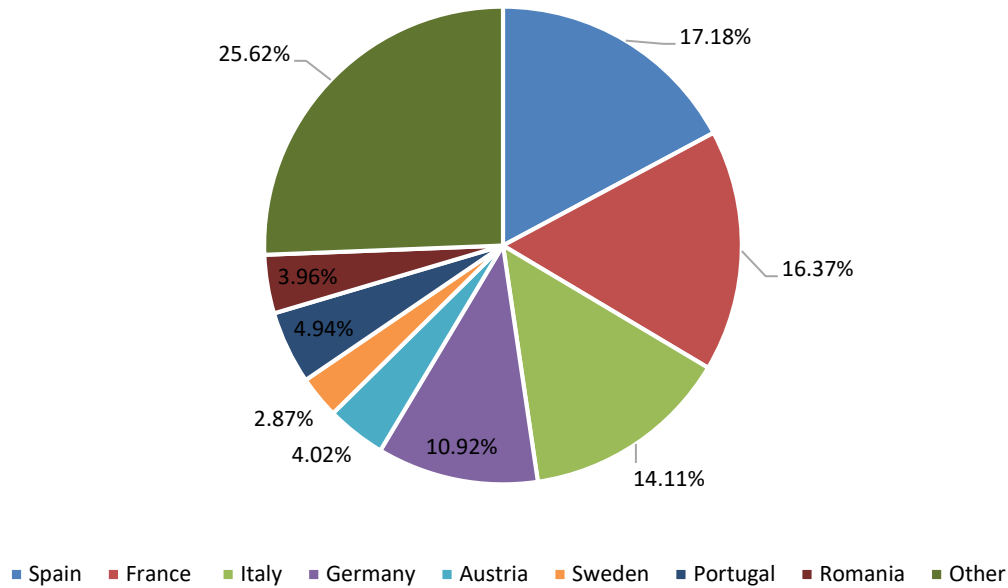
Source: Organic Trade Association (OTA), U.S. Census, USDA/FAS Posts in EU, 2024* and 2025* are USDA/FAS Post estimates

Consumers of organic products in Europe can be roughly divided into two groups. The first group, the so-called ‘regular buyers’, is a rather small, committed group that has been buying organic products for decades. Although this group is small, it grew during the COVID-19 pandemic and is responsible for almost half of the EU’s organic sales. This group tends to buy at organic specialty shops or farmers’ markets and price is not the deciding factor in making a purchasing decision.

The second, and much larger group, represents a different demographic. Double-income households with no children, older consumers (aged 50-75), parents with small children, and new-trend seekers fall into this group. They buy organic products for various reasons, including perceived health and food safety concerns, animal welfare, sustainability, quality, perceived taste, and innovative packaging. This so-called ‘light buyers’ group purchases organic products both at full-range supermarkets and in specialty shops. This is the group that shifted consumption patterns the most in 2022, buying less organic food than the year before. However, due to its size and diversity, it is this group that the organic industry should focus on to generate future growth.

The largest shares of total EU organic farmland are in Spain, France, Italy and Germany. These four Member States account for almost 60 percent of total organic agricultural land in the EU.

Figure 4: Organic Acreage in the EU (in % of total, in 2023)



Source: USDA/FAS Posts in EU

For 2023, FAS EU Posts estimate a 3 percent increase from 16.9 million hectares in 2022 to 17.4 million hectares in 2023. FAS posts in the EU expect organic area to either increase or stagnate in all member states through 2024 and 2025, except in Finland and Sweden, where it is expected to decrease marginally. In Sweden, this is due to low sales and farm prices. The Finnish organic market also faces challenges such as increasing consumer price sensitivity and changes to subsidies, which have led to decreasing hectares under organic production. For the EU in total, a 14 percent increase in organic area is expected in 2025 in comparison to 2022.

The EU has set a goal of reaching 25 percent of total farmland under organic production by 2030.⁴ In order to reach this goal, the pace at which farmland is converted to organic area would have to almost double. In 2023, Austria was the only member state with over 25 percent organic area.

EU organic land is split between arable crops (45 percent) and permanent grassland (40 percent). The largest arable crop groups are green fodder and cereal production with the largest areas found in France, Italy and Germany. Over 10 percent of organic area is used to grow permanent crops, of which almost three-fourths is in Spain, Italy, and France. Most of this land is used to produce olives, grapes, and nuts. The proportion of agricultural land farmed organically differs widely between EU Member States. The highest share of area dedicated to organic farming is reported in Austria, followed by Estonia, and Sweden.

⁴ <https://www.eea.europa.eu/en/analysis/indicators/agricultural-area-used-for-organic>

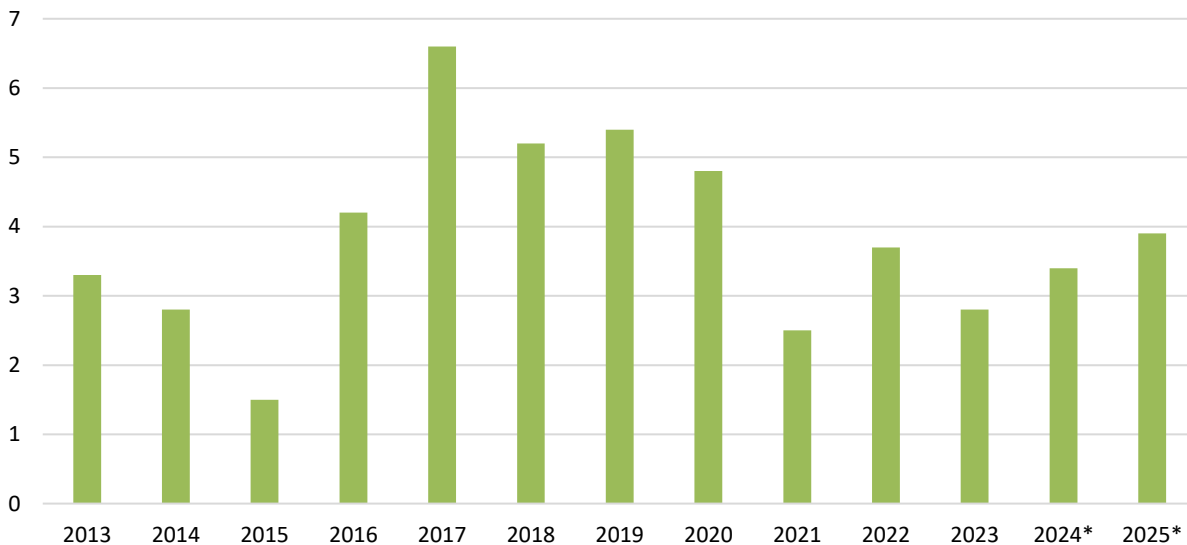
Section II Exports of U.S. Organic Food

In 2023, global U.S. organic food exports were officially valued at \$693 million. Canada and Mexico are still by far the largest markets for U.S. exports, followed by South Korea, Taiwan, and Japan. For January through October 2024, total exports are valued at \$677 million and the most relevant importing markets remain the same as in the year 2023. Note that tracking of organic food exports only began in 2011 and the current HS codes for organic products cover only a fraction of total organic trade. Existing HS codes primarily cover organic fresh products like milk, fruits, and vegetables, but do not currently exist for most processed products or organic nuts. Actual U.S. exports of organic products globally are estimated to be much higher than what is covered by these codes. The source of the following trade data is the [U.S. Census Bureau Trade Data](https://www.census.gov/foreign-trade/index.html)⁵ retrieved from USDA's [Global Agricultural Trade System Online \(GATS\)](https://apps.fas.usda.gov/gats/default.aspx).⁶ Please see Annex I for further information on the HS tariff codes for organic products.

Select U.S. Organic Exports to EU

After a significant decline in 2021, exports of U.S. organic tracked products to the EU rebounded to \$3.6 million in 2022. In 2023, select U.S. organic exports to the EU again declined by about 20 percent compared to the previous year at \$2.9 million. It is estimated that the market will continue to increase marginally in 2024 and 2025 due to the recovery of the EU organic market. From January through October 2024, U.S. organic exports to the EU totaled \$2.9 million, a 20 percent increase compared to the same time period in 2023. It is expected that U.S. exports to the EU will continue to increase as the EU organic market recovers.

Figure 5: Officially Tracked U.S. Organic Exports to the EU (in \$ million)

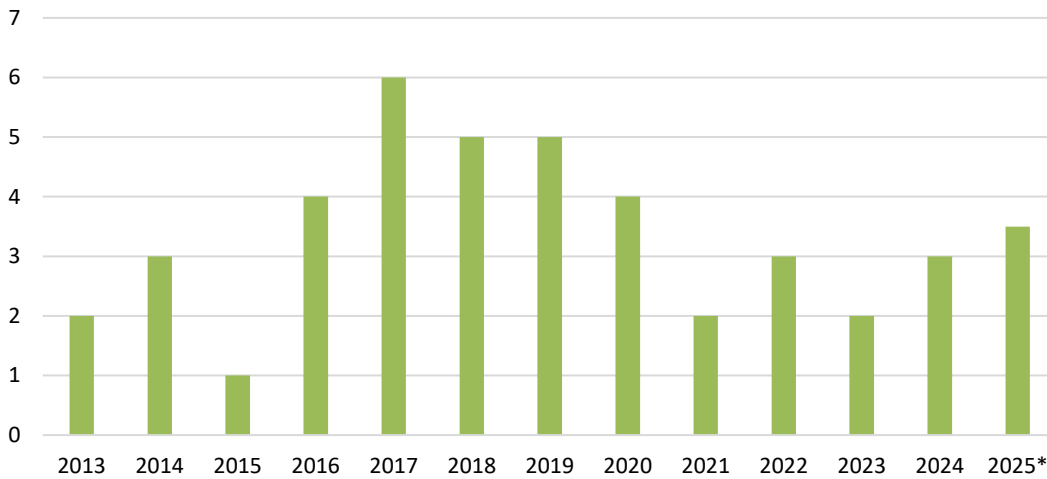


Source: U.S. Census Bureau Trade Data, *FAS estimate

⁵ <https://www.census.gov/foreign-trade/index.html>

⁶ <https://apps.fas.usda.gov/gats/default.aspx>

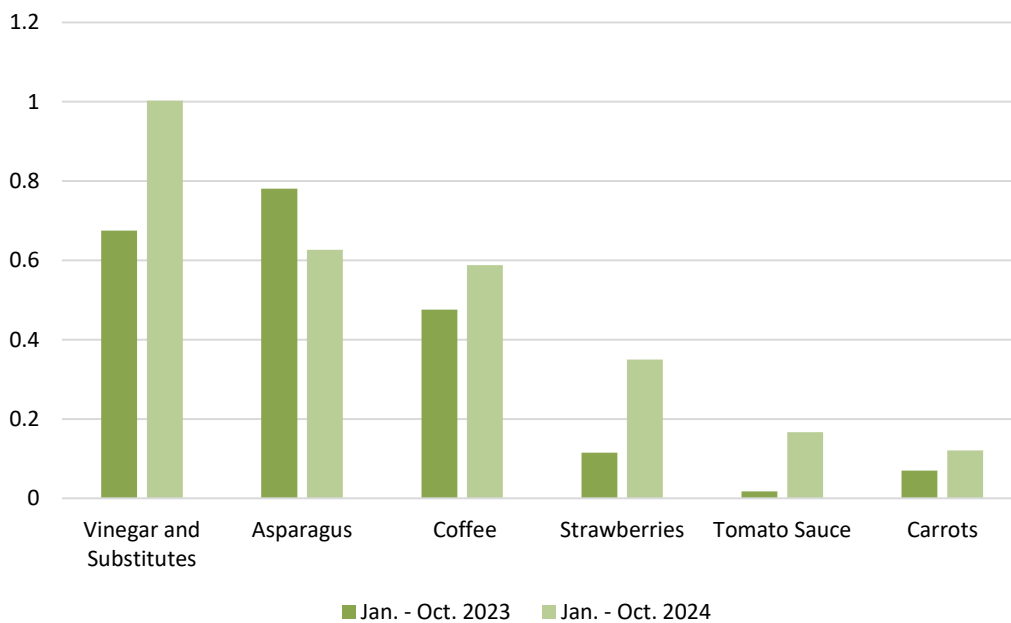
Figure 6: Officially Tracked U.S. Organic Exports to the EU, January - October (in \$ million)



Source: U.S. Census Bureau Trade Data, *FAS estimate

From January through October 2024, the top imported organic goods from the U.S. to the EU were vinegar, asparagus, coffee, strawberries, tomato sauce, carrots and oranges. Exports of organic vinegar increased nearly 50 percent year-on-year during this time period and the value of imported strawberries and tomato sauce more than doubled. In comparison to 2023, there were no imports of grapefruit, limes and dates. Instead, a small amount of peppers, cherries and pears were imported into the EU. The United States’ top organic product exports to the EU frequently change from year to year. This is due to price fluctuations and the supply situation in the United States, as well as the demand situation in the EU. In general, this is also more characteristic of the fresh food market than for processed food. Good opportunities exist for fresh produce during the European winter when local supply is lower and for products which are not or only insignificantly produced in the EU.

Figure 7: Top U.S. Organic Exports to the EU (in million \$)



Source: U.S. Census Bureau Trade Data, *FAS estimate

The United Kingdom exited the European Customs Union in January 2021. Prior to this, it had been the largest importer of select U.S. organic products to the EU. In 2023, Belgium and the Netherlands were the top importers of U.S. organic products within the remaining EU-27 followed by Ireland, Germany, and Sweden. These five countries together account for about 90 percent of U.S. organic imports by the EU in this year. Major EU importers act as distributors and transship organic products to other EU member states.

Section III The EU-U.S. Organic Equivalence Cooperation Arrangement

The EU and the United States signed the [EU-U.S. Organic Equivalency Arrangement](#)⁷ in 2012. Under the Arrangement, the EU recognizes the USDA National Organic Program (NOP) as equivalent to the EU Organic Program (under applicable EU regulations) and allows U.S. organic products to be marketed as “organic” in the EU using the EU organic logo. The Arrangement is limited to organic products of U.S. origin, either produced within the U.S. or where the final processing or packaging occurs within the United States. Since 2012, this partnership has streamlined trade between the two largest organic producers in the world. It provides organic farmers and businesses access to a growing combined market.

Please note that on October 4, 2024, the European Court of Justice of the European Union published [a judgement](#)⁸ that prohibits the use of the organic production logo of the European Union for products manufactured in a third country according to rules merely equivalent to those laid down by EU law. However, such a foodstuff may nonetheless bear the organic production logo of that third country. The European Commission is still assessing how the judgement will impact the EU-U.S. Organic Equivalency Arrangement.

With the new Organic Regulation (more details in Section IV), the EU now requires trade agreements in place of equivalence arrangements. With these EU regulatory changes, the U.S.-EU equivalence arrangement will expire by January 1, 2027, five years after the entry into force of the new regulation. To avoid trade disruptions, all non-EU countries, including the United States, that are currently recognized as equivalent may revise the terms of their arrangement with the EU. The new version of the arrangement will aim to recognize that the non-EU country has a “system of production meeting the same objectives and principles by applying rules which ensure the same level of assurance of conformity as those of the Union.” Currently, Chile, Switzerland and the United Kingdom have signed [organic equivalence trade agreements with the EU](#).⁹

⁷ <https://fas.usda.gov/newsroom/us-eu-organic-equivalence-trade-arrangement-opens-new-markets>

⁸ https://curia.europa.eu/jcms/jcms/p1_4584962/en/

⁹ https://agriculture.ec.europa.eu/farming/organic-farming/trade/agreements-trade-organic-products_en

Section IV Organic Policy in the EU

On January 1, 2022, the EU Regulation on Organic Production and Labeling of Organic Products: [Regulation \(EU\) 2018/848](#)¹⁰, entered into force. This Regulation outlines the objectives and principles of organic agriculture in the EU, fixes general production rules, and describes the EU's organic production standards, control system, and labeling requirements. This new Organics Regulation was supposed to enter into force on January 1, 2021. However, due to difficulties faced by the sector because of the COVID-19 outbreak, the EU decided to postpone the entry into force by one year and the Regulation entered into force on January 1, 2022. The new Organic Regulation introduces regulatory changes for both the production of organic products in the European Union and for imported organics.

In July 2024, the European Commission published a Frequently Asked Questions document on organic rules under Regulation 2018/848. It can be downloaded here: https://agriculture.ec.europa.eu/system/files/2023-11/organic-rules-faqs_en.pdf

Scope

The scope of the organic rules is enlarged to cover a wider list of products than the previous legislation. New products include salt, cork, beeswax, maté, vine leaves, essential oils, and palm hearts. The full list can be found in Annex I of the Regulation. It also lists additional production rules for livestock farming for deer, rabbits, and poultry.

Labeling

The term “organic” and all its derivatives or diminutives such as “bio” and “eco” may be used only to label products that comply with EU organic production rules and if at least 95 per cent of the ingredients of agricultural origin are organic. For products containing less than 95 per cent organic ingredients, the term “organic” may be used only to indicate individual organic ingredients in the list of ingredients. When reference is made to the organic production method in the ingredients list, the total percentage of organic ingredients must be indicated. Products containing genetically modified organisms (GMOs) or produced with GMOs cannot be labeled as organic.



The use of the EU organic logo (pictured above) is mandatory on all pre-packaged organic products produced in the EU. Since September 2024, the EU organic logo can also be used in black and white; the technical specificities are laid down in [Implementing Regulation 2024/2867](#).¹¹ When the EU organic logo appears on the label, the indication of the place of farming is required. This indication may be classified as ‘non-EU Agriculture,’ where the agricultural raw material has been farmed outside of the EU. However, ‘non-EU’ may be replaced or supplemented by the name of a country, or by the name of a region if all of the agricultural raw materials of which the product is composed have been farmed in that region.

¹⁰ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02018R0848-20241201>

¹¹ https://eur-lex.europa.eu/eli/reg_del/2024/2867/oj

Food Production

The 2018 Organic Regulation introduced stricter rules for the use of natural flavoring in organic food preparations. Under [Regulation 2018/848¹²](#), only natural flavorings originating from the mentioned ingredients can be used in organic processing. For example, only ‘natural strawberry flavoring’ is allowed, which means that the flavoring must be at least 95% obtained from strawberries. In this case, strawberry extracts are allowed. Under the new Organic Regulation, flavorings are regarded as agricultural ingredients. This means that the maximum permissible number of conventional flavorings in an organic product, together with all other non-organic ingredients, shall not exceed 5% of the total agricultural ingredients.

[Regulation 2018/848¹³](#) also limits the use of additives and processing aids to produce food and feed. Only certain products and substances are authorized for use in the production of processed organic food and feed, alongside yeast. The list of products and substances that may be used in the production of organic processed products is listed in Part IV of Annex II of the Regulation.

Organic Pet Food

In October 2023, the European Union adopted [Regulation 2023/2419¹⁴](#) on the labeling of organic pet food. Pet food can now be labeled with the EU organic production logo if 95 percent of its agricultural ingredients are organic. The new rules make the EU organic production logo mandatory for prepacked organic pet food. Organic pet food labeled in accordance with national rules or private standards accepted by the Member States between January 1, 2022, and October 30, 2023, may be placed on the market until stocks are exhausted. For more information, please see [GAIN Report EU Adopts New Rules for Organic Pet Food](#).

Certification

The EU has implemented a system of electronic Certificates of Inspection (COI) for imports of organic products in the EU. The COI has to be issued by the relevant control authority or control body before a consignment leaves a third country of export or origin, but [Commission Regulation 2021/2306¹⁵](#) allows the information contained in the transport document to be checked and included in the certificate of inspection by the relevant control authority or control body within a maximum 10 days from the issuance of the certificate, as long as it is before the endorsement of the certificate by Member State’s authorities.

More information here:

- [EU Commission Organics Page¹⁶](#)
- [Commission Notice Questions and answers on the application of EU rules on import controls on products from third countries intended to be placed on the EU market as organic products or in-conversion products.¹⁷](#)

¹² <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02018R0848-20241201>

¹³ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02018R0848-20241201>

¹⁴ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32023R2419&qid=1699449628478>

¹⁵ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02021R2306-20220701>

¹⁶ https://agriculture.ec.europa.eu/farming/organic-farming/trade_en

¹⁷ https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv%3AOJ.C_.2022.362.01.0003.01.ENG&toc=OJ%3AC%3A2022%3A362%3ATOC%22%20\t%20%22_blank

EU Action Plan for the Development of Organic Production

On March 25, 2021, the Commission published the [EU Action Plan for the Development of Organic Production](#).¹⁸ As part of Europe's Farm to Fork Strategy, the aim of the Action Plan is to boost the production and consumption of organic products to reach a target of 25 percent of organic agricultural land in the EU by 2030. To do so, the Commission encourages Member States to develop national organic action plans as part of their [National Strategic Plans](#)¹⁹ under the Common Agricultural Policy. The Commission, however, does not require national targets for organic production. Success of the Action Plan will depend on implementation at the Member State level and how the EU Member States encourage increased production and promotion of organic products as well as consumer willingness to buy organic. For more information on the Action plan, please see [GAIN Report EU Commission Unveils EU Organic Action Plan](#).

In December 2023, the European Environment Agency published [a report](#)²⁰ that states that the EU is not on track to meet its targets set by the EU Action Plan on Organic Farming. Although the policies currently in place are expected to increase the share of organic farming, the report notes that this will not be enough to meet the target of 25 percent by 2030. The agency projects that growth will remain stable and result in a 15 percent organic farming area share by 2031 with the assumption of growing demand and continuing policy support.

Section V Market Development

The Organic Trade Association (OTA) has a wealth of information and experience in helping U.S. companies in their endeavors to expand business overseas. Information about the OTA and how it assists the U.S. organic industry can be found at <https://ota.com/>.

In addition to OTA, there are various other trade associations that can be of assistance in promoting your organic commodities in the EU. An overview of U.S. commodity cooperators can be found at <https://www.fas.usda.gov/topics/getting-started>. Note that not all U.S. cooperators have programs for the EU.

Trade shows are excellent venues for U.S. exporters to connect with potential business partners, to conduct product introductions and to gauge buyers' interest. *BioFach*, based in Nuremberg, Germany, is the largest international trade show for organic products in the world. *BioFach* is USDA-endorsed. More information about *BioFach* can be found at <https://www.biofach.de/en>.

The *Nordic Organic Food Fair*, which takes place in Malmö, Sweden provides an excellent platform for U.S. companies that wish to sell organic, as well as sustainable certified food products and beverages to buyers based in the Nordic region. Detailed information about the trade show can be found at www.nordicorganicexpo.com.

The *Free From Food Expo* which takes place in Amsterdam, the Netherlands and Barcelona, Spain also focuses on organic products. It attracts buyers from not only the Netherlands and Spain but also from other European countries. Highlighted products range from ingredients to finished products. More information can be found at www.freefromfoodexpo.com.

¹⁸ https://agriculture.ec.europa.eu/farming/organic-farming/organic-action-plan_en
<https://www.europarl.europa.eu/legislative-train/theme-a-european-green-deal/file-action-plan-for-the-development-of-organic-production>

²⁰ <https://www.eea.europa.eu/publications/european-union-8th-environment-action-programme/indicators/17-agricultural-area-under-organic/view>

Fruit Logistica (<https://www.fruitlogistica.com/en/>) is a regional (European) trade show based in Berlin that also attracts buyers of organic fresh produce, nuts, and dried fruits from around the world. This show is also USDA-endorsed with a U.S. pavilion.

U.S. exporters of organic food ingredients should consider exhibiting or visiting the *Food Ingredients* (<https://www.figlobal.com/fieurope>) or *Vitafoods* (<https://www.vitafoods.eu.com/>) trade shows. These shows attract many in the food processing industry.

There are also numerous regional organic shows throughout Europe. For example, *Bio Beurs* is the leading organic event in the Netherlands where mostly Dutch suppliers exhibit their latest food products and technologies. If you are interested in one of the regional shows, please contact the [responsible FAS office](#)²¹ for more information.

Finally, trade shows like *ANUGA*²² or *SIAL*²³ attract mainly buyers of specialty and retail-ready products and are therefore best suited for exporters of U.S. organic processed products like confectionary products, snacks, and baby food.

Section VI Post Contact and Further Information

Internet home pages of potential interest to U.S. food and beverage exporters are listed below:

FAS/Washington <http://www.fas.usda.gov/>.

U.S. Mission to the European Union <https://www.usda-eu.org/>.

If you have questions or comments regarding this report, please contact the U.S. Foreign Agricultural Service Office in Berlin at the following address:

Foreign Agricultural Service
U.S. Department of Agriculture Embassy of United States of America
Clayallee 170
14191 Berlin
Germany Tel: (49) (30) 8305 – 1150
Email: AgBerlin@state.gov

Annex I Current list of U.S. organic export HS codes

The first organic HS codes were introduced to the Harmonized Tariff Schedule of the United States in 2011. The list of organic product groups tracked in the HS system has expanded over the years, with the last addition of organic HS codes to the system in 2018. The Harmonized Tariff Schedule has not been able to keep up with the ever-expanding list of organic products available on the global market. As a result, there is a gap between actual trade and the data associated with HS organic codes. There is a different set for exports and imports of organic products. Less than four dozen organic products for U.S. exports have their own classification coding. Everything else is not categorized as organic in this system. Despite this, the HS system provides a useful tool for tracking covered products and to track the export dynamics for those specific products.

²¹ <https://www.fas.usda.gov/international-offices>

²² <https://www.anuga.com/>

²³ <https://www.sialparis.com/en>

List of Organic Export Commodities Covered in the Harmonized Tariff Schedule of the United States

HS Commodity Code	Aggregate Name	Start Date
701900070	Organic Potatoes Fr/Ch Xsd Oth	1/1/2011
702000015	Organic Cherry Tomato Fr/Ch	1/1/2011
702000025	Organic Roma Plum Tomato Fr/Ch	1/1/2011
702000035	Organic Tomato Other Fr/Ch	1/1/2011
703100010	Organic Onion Sets Fr/Ch	1/1/2011
704100010	Organic Cauliflower Fr/Ch	1/1/2011
704904025	Organic Broccoli Fr/Ch	1/1/2011
705110010	Organic Head Lettuce Fr/Ch	1/1/2011
709400010	Organic Celery Fr/Ch	1/1/2011
709600010	Organic Peppers Fr/Ch	1/1/2011
709700010	Organic Spinach Fr/Ch	1/1/2011
805100045	Organic Oranges Fr/Dr	1/1/2011
805502010	Organic Lemons Fr/Dr	1/1/2011
806100010	Organic Grapes Fresh	1/1/2011
808100010	Organic Apples Fresh	1/1/2011
810100010	Organic Strawberries Fresh	1/1/2011
810400026	Organic Cult Blueberries Fresh	1/1/2011
901210010	Organic Coffee Roast Not Decaf	1/1/2011
2103204010	Organic Tomato Sauce Ex Ketchp	1/1/2011
704902010	Organic Cabbage Fr/Ch	1/1/2011
707000010	Organic Cucumbers Fr/Ch	1/1/2012
805400010	Organic Grapefruit Fresh	1/1/2012
808300010	Organic Pears Fresh	1/1/2012
809290010	Organic Cherries Fresh	1/1/2012
705190020	Organic Lettuce Not Head Fr/Ch	1/1/2015
705190030	Organic Lettuce Not Head Fr/Ch	1/1/2015
705190040	Organic Lettuce Not Head Fr/Ch	1/1/2015
706103020	Organic Carrots Fr/Ch	1/1/2015
706103030	Organic Carrots Fr/Ch	1/1/2015
706903100	Organic Beet Fr/Ch	1/1/2015
708101000	Organic Peas Fr/Ch	1/1/2015
709202000	Organic Asparagus Fr/Ch	1/1/2015
805505010	Organic Limes Fr/Dr	1/1/2015
807111000	Organic Watermelon Fresh	1/1/2015
809301000	Organic Peach/Nectarin Fresh	1/1/2015
810202000	Organic Berries Fresh	1/1/2015
401201000	Organic Milk	7/1/2016
2005100010	Organic Vegetables Prep/NT FZ	7/1/2017
2007100010	Organic Fruit Prep	7/1/2017
2209000010	Organic Vinegar and Substitutes	1/1/2018

Source Notes: United States’ export and import statistics on the above-mentioned organic products can be obtained through the USDA’s Global Agricultural Trade System Online (GATS): <https://apps.fas.usda.gov/gats/default.aspx?publish=1> by running a standard query and selecting “Organics-Selected” under “Product Groups”.

Annex II EU Organic Single Country Markets

The Foreign Agricultural Service produces country reports on the organic markets in select European Union (EU) member states. These reports can be downloaded from the [GAIN](#)²⁴ website.

Please also see below for summary on some EU markets:

Austria

Growth in Austria's organic market slowed down in 2023. Despite a difficult market environment due to high inflation and increasing cost of living over the past years, organic sales increased by almost 2 percent by quantity but stagnated by value compared to the first half of the previous year. Compared to conventional products, prices of organic products - on an average - decreased somewhat. The price difference between organic and conventional products became smaller. Expectations for 2024 and the forecast for 2025 are for a stagnating to slightly-growing organic market. The RollAma²⁵ survey shows sales (food retail, direct sales and organic specialist retailers, catering) of \$3.13 billion (€2.89 billion) for the overall organic Austrian market in 2023. A slight decline in organic area and a decline in number of farms in 2023 halted Austria's long-term trend of increasing organic area. However, Austria still has the highest percentage of agricultural land under organic management within the European Union and organic production remains an important sector of Austrian agriculture.

Belgium

The number of organic farms in Belgium remained stable in 2023 from 2022, after considerable growth over the past ten years. From 2013 to 2023 the number of organic farms increased by 56 percent. Following a slight decline in organic consumption in 2022 due to high inflation, 2023 consumption increased with organic food accounting for 4 percent of total food consumption in Belgium. Top-selling organic products include meat, fruits, vegetables, and eggs. Most organic purchases occur in supermarkets followed by farmers' markets and organic stores.

Bulgaria

Bulgaria's organic area increased sharply in 2023 to 147,798 ha, a 34 percent year-on-year increase. Organic production now accounts for 2.95 percent of total agricultural land. Organic acreage declined from 2016 to 2021 but began to increase in 2022 due to recertification of some organic farms and more favorable domestic support. According to local sources, area continued to expand in 2024, reaching 3 percent of total agricultural land use.

The amount of fully converted certified organic land was stable at 60,000 ha in 2023 compared to 2022. Due to emergence of new producers in 2023, the share of certified land within total organic land dropped to 41 percent in 2023 compared to 55 percent in 2022. It is expected that this trend will be more pronounced in 2024 due to more domestic support funds encouraging new players.

The number of organic operators increased from 4,863 in 2022 to 5,026 in 2023, which accounted for 6.4 percent of all registered farmers. About 47 percent of organic area is represented by hayfields and pastures, followed by orchards at 15 percent, and grains with a share of 12 percent. Positive changes were also reported for organic dairy farms. The number of cattle raised at organic farms more than doubled while sheep grew by 52 percent in 2023 vs 2022. The number of organic beehives also increased, accounting for 29 percent of total beehives.

²⁴ <https://gain.fas.usda.gov/#/>

²⁵ RollAMA is a quarterly agricultural and food marketing study conducted by [keyQuest](#) by order of Agrarmarkt Austria Marketing – [“AMA” Marketing](#).

Consumer demand growth has benefited from lower inflation, healthy lifestyle trends, and growing and diversified retail choices. Despite being on an upward trend, the share of organic food sales remains at around 1.0 percent of total food sales (€9.6 Euro/capita in 2023 and €10/capita estimated for 2024) as compared to other EU member states. Affordability and availability are key factors for consumption. Locally produced organic fresh produce, honey, juices and dairy products supply most domestic consumption while organic baby food, pasta, tea, coffee, meat and snacks come mainly from imports. Overall, organic food sales are dominated by imported products due to better choice and availability at retail.

Croatia

Croatia's organic food market, while small, is emerging with imported organic products dominating the market. Top export opportunities include fresh produce, dried fruits and nuts, specialty grains, and processed products. Affordability and availability will be the key factors motivating purchases by the price sensitive Croatian consumer. Croatian organic production is steadily growing year on year.

Czech Republic

Czechia's total market size of organic products is around \$260 million and continues to grow at a slow and steady rate. Around 50 percent of organic products are imported. Most of the sales of organic foods are generated by retail chains, followed by specialized stores and online retailers. Online shops and seasonal open-air markets are popular channels among Czech organic farmers for direct sales and local fresh products are very popular among Czech consumers. In 2023, there were 5,050 local organic farms and 990 registered organic food producers. Most of them produce wine, milk and dairy products, fruit and vegetables, and meat. Although demand for organic packaged food products has recently grown, they remain relatively expensive and are only purchased regularly by higher-income consumers. Czech consumers are particularly interested in organic coffee, tea, ready-to-eat meals including baby food, and dairy products. Best prospects for U.S. organic products include innovative products with strong marketing support such as dried fruit and nuts, pulses, snacks, cereals and other products with a longer shelf life.

The Czech Republic has one of the highest shares of organic management on total agricultural area (around 16 percent). Grassland accounts for the largest percentage (about 80 percent of all organic agriculture area).

Denmark

Denmark is one of the larger organic markets within the EU, mainly due to its high per capita consumption of organic products of about \$440 in 2023. Denmark has the world's highest share of organic food consumption (13 percent) and the most well-developed organic market. On average, 80 percent of the population buys organic products occasionally, and 50 percent buys organic products every week. More than 5 percent visit an organic farm every year. Fresh produce is the most important organic product, making up more than one third of total organic sales. Dairy is the second-largest organic product, accounting for one fifth of organic sales. Danish supermarkets account for almost 90 percent of total organic sales.

Denmark was the first country to establish rules for organic production and control as well as implement an organic label. The unique and government-certified Ø-label has been very important in increasing organic sales as almost every Dane recognizes the Danish organic label. Sales of organic products are expected to remain strong in 2024 and 2025 due to keen consumer interest in healthy, nutritious, and sustainably-produced food products combined with general trust in the Ø-label. Many Danish consumers choose to prioritize organic products due to their values and lifestyle as opposed to price and affordability.

Estonia

Estonia's area under organic farming has grown continuously year after year. The country holds second place in Europe after Austria regarding organic area as a percentage of agricultural land use. In 2023, 231,000 hectares of farmland, representing 23 percent of Estonia's agricultural land in use, was recognized as organic or in transition to organic production.

Finland

In 2023, 13.7 percent of Finland's arable land, or almost 312,000 hectares, was under organic production. The share of organic arable land decreased by 8 percent from the previous year. This was mainly due to challenges in the organic market such as changes to subsidies and increasing consumer price sensitivity. A total of 142 million kgs of organic grains were produced, with the harvest down 21 percent from 2022 due to variable weather conditions. More than half of the organic grain harvest, as in previous years, was oats. Organic grains made up 5 percent of the total grain harvest in Finland.

North Karelia has the highest share of agricultural land under organic production (24.2 percent). Northern Ostrobothnia and Southwest Finland lead in terms of largest total area under organic production at 37,664 and 35,277 hectares, respectively.

Organic products sold in grocery stores totaled 352 million euros, and the share of organic products in total grocery sales was about 1.9 percent. Sales decreased by 6 percent from the previous year as many consumers became increasingly price conscious.

The use of organic products in public food services has grown rapidly over the past two years. Ninety-one percent of public food services report using at least one organic product at least monthly, and as many as 63 percent report using organic products daily. The highest percentages of organic product use are in kindergartens and schools. Almost sixty percent of Finns consider offering organic products in these settings to be at least fairly important. The Finnish government's goal is for a quarter of the raw materials in public kitchens to be organic by 2030.

The most popular organic products in food services include flakes and groats, milk and dairy products, coffee, and flour. There is a desire to further increase the use of organic products, especially in vegetables and root vegetables, berries, fruits, grain products, and eggs. As many as 30 percent of food services would like to increase their use of organic products in at least one product category.

Germany

Germany is the largest market for organic products in the EU. After taking a dip, the German organic market began to recover in 2023 and will most likely continue to recover in 2024. In total, 11.4 percent of total agricultural area is organically farmed and 36,680 farms in Germany are organic. In 2023, the number of organic farms decreased by 0.5 percent for the first time in 30 years. However, this small dip stands in contrast to a general upwards trend of 7.5 percent in the past 5 years. Full-range and discount supermarkets played a central role in the recovery of the organic market in Germany, as consumers bought more store brand organic products and shopped at discount supermarkets according to their financial situation. Organic plant milks dominated the German market and the sales thereof increased by 13.4 percent. Please see the [country-specific report](#) for more information.

Greece

Area under organic production continued to increase in 2024. Approximately 650,000 ha are cultivated organically in Greece. Inflation is causing a downtrend effect on organic produce sales due to a combination of increasing input, transportation, and storage costs. Greek consumers continued to face an economic recession, high unemployment rates and shrinking disposable incomes at the end of 2024. Greek consumers remain price sensitive and frugal in their spending, trying to save money whenever possible. This pushed consumers away from organic food, given the significantly higher retail price of organic products, after a positive uptick during the pandemic.

Hungary

Due to EU co-financed support programs, organic farmland increased significantly in 2019 (by 44 percent, to 303,190 ha), but has largely remained steady since then, totaling 320,251 ha in 2023. In 2023, organic farms accounted for 6.3 percent of total agricultural land. Fifty-five percent of these fields (176,338 ha) were pastures. The share of organic arable crop production (117,113 ha) was 36.6 percent, and that of the organic fruit production was 6.7 percent (21,385 ha). Price sensitivity remains a decisive factor for organic consumption, but health consciousness and perceived environmental benefits often have priority in buyers' decisions.

A new call for grant applications was launched in Hungary for the support of organic farming. Hungary's Agriculture Ministry commented that the state would provide 80 percent co-financing to rural development grants and subsidies from 2021 to 2027. In the country's Common Agricultural Policy (CAP) Strategic Plan, Hungary pledged that the share of organically farmed areas would reach 10 percent (504,000 hectares) by 2027.

Ireland

Between 2022 and 2024, the area farmed organically in Ireland increased markedly due to financial support through the Organic Farming Scheme (the budget of which grew by 300 percent) and the accompanying Organic Capital Investment Scheme. Consequently, 28,000 hectares are expected to be converted into organic production from January 1, 2025 (taking the total up to nearly 5.6 percent of farmed land) and towards the aspiration of reaching 10 percent of Ireland's utilizable agricultural area by 2030. In 2024, there were 5,000 organic farmers in Ireland, a threefold increase compared to 2020, with 85 percent of recent scheme applications from the livestock sector.

The Department of Agriculture, Food and the Marine published an updated '[National Irish Organic Strategy](#)' in September 2024. This Strategy set out a series of priorities aimed at realizing the ambition of tripling the organic sector's wholesale value by 2030. Boosting exports is key to this goal, as around half of Irish organic lamb and around two-thirds of organic beef and oats are exported. Parallel efforts to grow the domestic market have involved promotional campaigns like 'More-ganic', designed to encourage consumers to add more Irish organic produce to their shopping baskets. Another strand of the growth strategy has stipulated that a minimum of 10 percent of food purchased through public procurement should be certified organic.

Data for the first nine months of 2024 suggests the Irish market for organic food and drinks has turned a corner compared to the slump caused by the cost-of-living and general inflationary challenges in the last few years. Absorption capacity of the domestic market will be tested by the new production incentivized through the additional support under the Organic Farming Scheme.

Italy

In 2023, Italy maintained its position as a leader in organic agriculture, with over 2.46 million hectares of certified organic farmland, accounting for 19.8 percent of the total agricultural area. The country's organic food sales in large-scale retail reached \$4.07 billion (€3.88 billion), marking a 5.2 percent increase from the previous year. However, the organic sector's share of the agri-food market declined for the second consecutive year, reaching 3.5 percent. This decline can be attributed to slower price increases for organic items compared to conventional ones and the impact of inflation, which weakened household purchasing power and limited the expansion of organic consumption. In 2023, organic product sales in Italy increased across most categories, with significant growth seen in cereals and derivatives, vegetable oils and fats, fresh eggs, and non-alcoholic beverages. Organic wine rebounded strongly, rising by 6.9 percent after a 3.9 percent decline in 2022. Conversely, meat and cured meats experienced notable drops of 9.5 percent and 11.4 percent, respectively. Geographically, over 60 percent of organic consumption remains concentrated in northern Italy, while the South accounts for 12 percent of organic spending.

Latvia

The number of organic farms is increasing - in 2005, 2,838 farms were organically farmed and, in 2023, the number of organic farms increased to 3,610. Currently 16 percent of all agricultural land is managed organically. Smaller organic farms (0-30 ha) have declined as land is consolidated into large organic farms (100 ha and more) in recent years.

Lithuania

The organic food sector in Lithuania has been rapidly developing in the past decades. Over the last ten years, from 2015 to 2025, the value of the organic food market has increased twenty-fold, at current prices, to around EUR 120 million. Top-selling products for organic food in Lithuania includes bread and cereal products, milk and dairy products, and vegetables.

Netherlands

In 2023, organic area reached 80,900 hectares, totaling 4.5 percent of total agricultural land - an increase of 7.1 percent year-on-year. The Dutch Ministry of Agriculture has set a target of organic production on 15 percent of total land by 2030 through it's "Growth of Organic Production and Consumption" action plan. Reaching this target would require significant conversion of land to organic production, with organic area increasing 26,000 hectares per year.

Organic dairy farms made up 47.5 percent (38,500 hectares) of total organic area. In the arable farming sector, the largest sector after the dairy farms sector, 16.3 percent (13,200 hectares) of total land was organically certified. The number of organically certified farms increased by 1.7 percent in 2023 compared to a year earlier, to approximately 1,900.

In 2023, spending on organic food amounted to almost 2 billion euros, an increase of 11 percent. Last year, per capita spending on organic products was estimated at 112 euro per year. Top-selling organic products include fresh produce, dairy, as well as grocery and composite products. Some food retailers, including PLUS, are now offering organic products under private labels, and, for selected categories, organic variants are their standard products.

While organic sales have increased, rising living costs (due to rising prices for food, energy, housing, etc.) is driving some consumers to purchase more affordable conventional food or private label products, frequently through discount retailers.

HAK, one of the Netherlands' largest canned food producers, is taking the next step in its organic ambitions with green beans. HAK began its conversion to organic vegetables with red beets. HAK's organic green beans became

available in supermarkets this fall, replacing the category of conventionally grown green beans. The company wants to grow all local vegetables and legumes organically by 2027. That amounts to 85 percent of the total volume within HAK. This fall, the cannery also launched organically grown kale and sauerkraut in stores. Spinach, field peas, and broad beans will follow in 2025.

On June 7, 2024, the Ministry of Agriculture started a campaign promoting organic food to consumers. With the campaign, the ministry is informing consumers about how delicious organic food is, what its benefits are, and what the European organic label entails. This campaign includes online and television advertising and the website allesoverbiologisch.nl. The consumer campaign is part of the Ministry of Agriculture's Organic Action Plan.

Poland

The organic food market in Poland in 2023 amounted to approximately \$390 million. According to Nielsen IQ data, 2023 sales increased almost 8 percent. However, due to high inflation, this growth was likely due to price increases as opposed to growth in sales volumes. Despite many years of growth, organic food in Poland still accounts for only about 0.5 percent of the total food sales market. While there is increasing ideological and lifestyle-driven support for organic products, high inflation and rising living costs in relation to incomes have limited organic sector growth.

Portugal

Portugal's continuous growth in organic production is positioning it as a new powerhouse in the EU. More than 860,000 hectares are already certified, representing 19 percent of Portugal's agricultural area.

While a recent study, states that almost half of respondents seek to prioritize environmentally sustainable purchases related to daily expenses and groceries, organic price premiums are limiting organic consumption in this price-sensitive country. Inflation and an increasing cost of living have also reduced growth in the organic sector.

Romania

Romania's area under organic production continued to increase, reaching 694,000 hectares of combined certified and under-conversion land in 2023, an increase of 8 percent over 2022 according to the Ministry of Agriculture. The share of total area under organic farming in Romania rose from 4.4 percent in 2021 to 5.5 percent in 2023 and is forecast to keep growing in the near future. About 40 percent of organic area is represented by hayfields and pastures, followed by grains with a share of 25 percent.

All organic livestock expanded in 2023, with the most spectacular growth in organic laying hens and sheep, each with a year-on-year growth of around 23 percent. At the same time, the number of organic operators grew by 6 percent from 13,260 in 2022 to over 14,000 in 2023.

Supported by rising consumer incomes and by the increasing availability of a diversified range of organic food and beverages on retail shelves and online platforms, consumers' demand for such products is poised to expand. Organic milk and dairy products, eggs, and fresh fruits and vegetables appear to have rapidly gained space in consumers' shopping baskets.

Slovenia

The organic sector in Slovenia continues to grow slowly but steadily. In 2023 (latest available data), the area under certified organic management and under conversion totaled 54,600 ha. During the same year, the number of organic farms increased by about 2 percent, but agricultural holdings under conversion increased by 45 percent. Permanent grassland accounts for most organic farmland followed by arable land. Organic area is expected to increase moderately over 2024 and 2025. Slovenian consumption of organic food remains relatively low.

Spain

Organic production has grown by more than 60 percent over the last ten years. In 2024, a total of 2,991,881 hectares in Spain were cultivated using organic farming systems, according to official data. Andalusia, with 50 percent of Spain's total organic surface, is the leading producing region. Nuts remain the main organic crop, followed by olives, cereals and wine. Overall, 29 percent of nuts, 16 percent of vineyards and 10 percent of olives are grown organically in Spain.

The organic market continues to grow in Spain and is now worth 3 billion euros, as shown in the '[Annual Report 2024 Organic Consumption and Production](#)' by Ecovalia²⁶. The data shows that the organic sector grew 6.2 percent in 2023 compared to the previous year, consolidating its position in the top ten European countries with the largest organic market share.

Average per capita spending on organic products is \$67.2. Shopping basket analysis shows that organic plant-based foods are the most-purchased organic product (69 percent), compared to products of animal origin (28 percent). Notably, inflation has affected conventional foods more than organic products, with prices for conventional products increasing 23 percent more than organic prices.

Regarding marketing channels, Spanish consumers prefer to buy organic products from major retailers (50 percent), followed by dedicated stores (34 percent) and other channels (16 percent). The European Union's organic label is the most recognized label by consumers (64 percent). Among the main reasons for consumption, 43 percent highlight that organic foods are more natural, pesticide-free, and healthy. Twenty percent choose organic products for their flavor, quality and origin. Regarding frequency, 43 percent of Spanish consumers consume organic products every week.

The sector is comprised of 10,959 organic companies, which represents an increase of 23 percent over the last 5 years. Most companies focus on plant production (85 percent) as opposed to animal products.

Sweden

Sweden's organically farmed area has decreased for four years in a row. In 2023, the decrease was 16 percent, due to low farm prices and several years of declining organic sales. Currently one sixth of Swedish agricultural land is organically cultivated, far below the 25 percent target set by Sweden and the EU.

In 2023, total organic food sales were valued at \$3 billion in Sweden, representing a market share of 7.8 percent of total food sales. Total organic sales were more or less the same compared to 2022 (+ 0.9 percent). Sales increased largely due to higher prices while volumes declined, especially at the beginning of the year.

Although the price premium between organic and conventional products overall decreased following several years of higher inflation – when everything becomes more expensive, Swedish consumers tend to opt out of what costs more, and organic food still costs more than conventional food.

Swedish organic products carry the Krav-label. Krav is Sweden's leading organic production certification organization, and its standards comply with the EU regulation for organic production. This label has a uniquely high awareness among Swedes and almost every Swede knows the Krav brand to some extent.

²⁶ <https://ecovalia-repositorio-documental-web-2.s3.amazonaws.com/informe-anual-2024-ecovalia-consumo-produccion-ecologicos.pdf>

Attachments:

No Attachments.