2024
Edition

ORGANIC SECTOR WORLDWIDE

RÉPUBLIQUE
FRANÇAISE
Liberté
Égalité
Fraternité

L'AGENCE
BIO

International publication by Agence BIO
2024 Edition

AB
AGRICULTURE
BIOLOGIQUE

TABLE OF CONTENTS

Introduction

- The benefits of organic farming on the environment, human health, rural development and climate change mitigation are widely recognized.

- Our last publication on organic agriculture in the world was published in 2020. In the meantime, the situation has evolved significantly, especially in the EU.

Organic Regulations, Participatory Guarantee Systems and Equivalency Agreements

Organic Regulations

- In 2022, according to FIBL/IFOAM, regulations on organic farming were fully implemented in seventy-five countries. Nineteen countries had partially implemented regulations. National regulations were in preparation in fourteen other countries.

In North America

- In 2022 and 2023, the US organic regulations on poultry and livestock have been revised. New rules on organic food were also published in 2023. This is the most significant update to the organic food rules since their creation in 1990. The main goal is to limit fraud. Inspections will be strengthened and there are plans to further control organic imports.

- The Canadian Organic Standards were revised in late 2020, as part of their five-year review process. The next revision work is expected to begin in 2024.

In Europe

- In 2023, forty-one countries had organic regulations fully implemented and two others partially.

- The new European Union organic regulations came into force in the 1st of January 2022[1]. The regulatory changes concern production, controls and imports. Regarding production, new products will be able to be certified organic in the European Union: cotton, wool, leather and salt. The use of heterogeneous plant reproductive material will be authorized. Foods containing nanoparticles cannot be certified organic. For controls, operators selling pre-packaged products will be exempt from certification and notification for distribution. Distributors selling small quantities of unpackaged organic products directly to consumers may be exempt from control. All organic operators are checked at least once a year in the field. Producer group certification is recognized. For the moment, however, it is only used in Italy.
Regarding imports, equivalency will be replaced by conformity[2].

1- N°2018/848
2- More information in the chapter on equivalency agreements

- Several European countries outside the EU have organic regulations close to those of the European Union, such as Albania, Georgia and Moldova.

- Norway revised its organic regulations in 2022.

- Switzerland changed its organic regulations in 2023, in particular to add animal feed and essential oils.

- In Belarus, legislation on organic production was adopted late 2018.

- Since the 1st of January 2020, the law on organic food[1] came into force in Russia. Accreditation of certification bodies by the national authority Rossakreditazija has become a prerequisite for operating in this country.

In Asia

- In 2023, eleven countries had fully implemented organic regulations and ten partially, while seven countries were in the process of preparing one.

- In 2021, the Eurasian Economic Union countries decided to harmonize their organic production and labelling rules.

- In Kyrgyzstan, a national standard for organic products was adopted in April 2021. It concerns the production, storage, processing, and transportation of organic products. A law on organic production was adopted in March 2023. Its goals are to regulate organic production, to create favourable conditions for the development and dissemination of organic production, to ensure the safety of organic products for consumers, to improve competitiveness and to increase exports of organic products.

- Kazakhstan is preparing amendments to its 2015 legislation on organic agricultural production.

- In January 2019, Japan implemented specifications for organic products in restaurants. The certification procedure for organic farmers was simplified in 2021, in order to encourage farmers to this conversion. Organic regulations have been revised to include alcoholic beverages. It came into force in October 2022.

- The Mongolian government adopted a law on organic products in 2016. This is currently being revised to broaden its scope to non-food.

- In 2022, the Uzbek authorities adopted a new law on organic products. This regulates production, processing, storage, transport, labelling and marketing.

- In Vietnam, national standards on organic farming were published between 2017 and 2019.

1- Federal Law No. 280-FZ of August the 3rd, 2018

In Latin America

- In 2023, sixteen Latin American countries had fully implemented their organic regulations and three others partially. Two countries were in the process of developing organic regulations.

- In 2020, Mexico updated its organic regulatory framework. A national organic logo was created in 2021. Since 2022, to use this logo, imported products must be certified according to Mexican regulations.

- Since January 2023, certified organic producers have been able to use the Peruvian organic logo free of charge and voluntarily.

In Oceania

- New Caledonia and French Polynesia are the only Oceanian territories to have fully implemented organic regulations.

- In spring 2023, the New Zealand Parliament passed legislation regulating organic products, but this is still being developed. The main goal is to increase consumer confidence. The legislation provides for fines for anyone who deliberately misleads consumers by claiming their product is organic when it is not.

- Reflections are underway in Palau[1] and Fiji to regulate organic production.

- In Australia, there is still no national organic standard for organic products sold within the country, but only one for export. Australian Organic Limited believes that a national standard is necessary as it would increase consumer confidence. The organic sector has lobbied the government for over four years to adopt national organic regulations. However, in March 2023, the Federal Minister of Agriculture announced that he had decided not to create one.
The organic standard for export has been revised. The new rules came into force in 2023.

In Africa

- In 2023, five countries had partially implemented organic regulations and one country was in the process of developing one.

- In Morocco, national organic regulations have been applied since 2020. It was recognized by IFOAM in 2022.

- Early 2022, IFOAM granted recognition to the Togolese standard for organic farming which was put in place by the national organic association, ANA-Bio Togo.

- In Seychelles, the development of regulations on organic farming began in 2020.

1- Archipelago located in Micronesia

Participatory Guarantee Systems

- Participatory guarantee systems are locally oriented quality assurance structures. They are built on trust, networks and knowledge exchange. They are particularly suitable for small farms. They also help develop local markets for organic products.

- The first participatory guarantee system was created in the early 1970s, in the south of Brazil.

- Participatory guarantee systems are already recognized[1] by the State as organic certification systems in a large number of countries.

- In 2022, IFOAM identified 64,740 PGS with 188,709 certified organic producers[2] (compared to 6,000 in 2010), including Nature et Progrès.

- Asia was the continent with the biggest number of participatory guarantee systems with 64,531 in 2022 (99.7% of the world total!), far ahead of Latin America (144). India is the country with the most participatory guarantee systems.

Equivalency Agreements

- Equivalency agreements are provisions that eliminate the need for double certifications, thereby reducing fees, inspections and paperwork.

- A number of equivalency agreements have been signed. Some are bilateral and others are unilateral.

- In countries which do not have an equivalency agreement with the USA or the European Union, producers must often be certified according to several specifications in order to be able to export their organic production.

Agreements of the European Union

- Regarding the EU, from 2025, the new requirements of EU organic regulations will apply to third countries. Imported products must comply with EU regulations. Equivalent specifications will only be recognized within the framework of bilateral trade agreements or other existing agreements.
There will be a transition period between the two systems. The EU has given itself five years to negotiate such agreements with its partners. The European Commission will have the possibility of granting specific authorizations for the use of products and substances in third countries and its outermost regions, taking into account differences in ecological balances in production, particular climatic conditions, traditions and local conditions. These specific authorizations may be granted for a renewable period of two years. Trade agreements have already been concluded with

1- Otherwise, producers engaged in PGS are not counted in the FIBL/IFOAM statistics.
2- The other producers were still in conversion.

Chile and Switzerland, and a mutual agreement has been reached with the United Kingdom, guaranteeing the continuity of the existing agreement. A renegotiation with these three countries is therefore not necessary. Negotiations are underway with other third countries which currently have organic equivalency agreements with the EU and are expected to continue until 2026: Argentina, Australia, Canada, Costa Rica, India, Israel, Japan, New- Zealand, South Korea, Tunisia and the USA. Furthermore, negotiations have been initiated with Mexico and Colombia.

- The bilateral agreement between the USA and the European Union which came into force on the 1st June 2012 is restricted: to export animal products to the USA or to import apples and pears into the European Union, a Certificate of absence of use of antibiotics is required on both sides.

- The European Commission has officially included San Marino among the equivalent states for organic certification. Organic products from San Marino can therefore be exported freely to the EU and use the EU organic logo.

- The agreement between Japan and the European Union only concerns plant products (excluding wine).

Other Agreements of the United States of America

- The United States of America also has equivalency agreements with Canada, the United Kingdom of Great Britain, Switzerland, Japan, South Korea and Taiwan.

- The USDA also authorizes the governments of New Zealand and Israel to accredit their certifying agents according to US organic standards. USDA certified products manufactured or processed in these countries may be exported directly to the USA only.

- The restricted bilateral agreement between the USA and the United Kingdom of Great Britain entered into force on the 1st of January 2021. It is similar to that concluded between the USA and the European Union.

- The US agreement with South Korea only covers processed products.

- The agreement between the USA and Taiwan, which was previously unilateral[1], became bilateral in 2020. The USA is Taiwan's largest source of organic imports, accounting for 30% of the total.

- Early 2021, the USA ended their equivalency agreement with India.

Other Agreements of Canada

- Besides its agreements signed with the USA and the European Union, Canada also has agreements with the United Kingdom of Great Britain, Switzerland, South Korea, Japan, Taiwan[2], Costa Rica and Mexico.

1- It allowed the USA to sell its organic products to Taiwan.

2- Canada is the second origin of organic products imported to Taiwan.

- In 2023, Canada expanded the scope of its agreement with Japan to include alcohol.

- The equivalency agreement between Canada and the United Kingdom entered into force on the 1st of January 2021. It incorporates the terms of the agreement signed in 2009 between Canada and the European Union.

- The agreement signed with Mexico early 2023 is restricted. It concerns Canadian and Mexican agricultural and processed plant-based products, Canadian livestock and livestock products and products whose final processing or packaging took place in one of these two countries.

Other Agreements of Japan

- Japan has also signed agreements with Switzerland, Taiwan, Vietnam, Argentina, Australia and New Zealand.

- In 2020, Japan extended its agreements with the USA, Canada and Australia to include livestock products[1]. In August 2023, Japan and Canada expanded their equivalency agreement on organic products to include alcoholic beverages.

- The agreement concluded in 2020 between Japan and Taiwan only concerns plant production, unprocessed and processed (excluding alcohol, seeds and plants).

Other Agreements of Taiwan

- Taiwan also has agreements with Australia and New Zealand.

- In April 2023, Taiwan and Paraguay signed a protocol for mutual recognition of their organic production systems.

Other Agreements of the United Kingdom of Great Britain

- The United Kingdom has signed several agreements with other countries, including Switzerland, Argentina and Tunisia.

Ohers Agreements of Switzerland

- In addition to those previously mentioned, Switzerland has also signed an equivalency agreement with Chile.

Other Agreements of New Zealand

- New Zealand also has agreements with China and Australia.

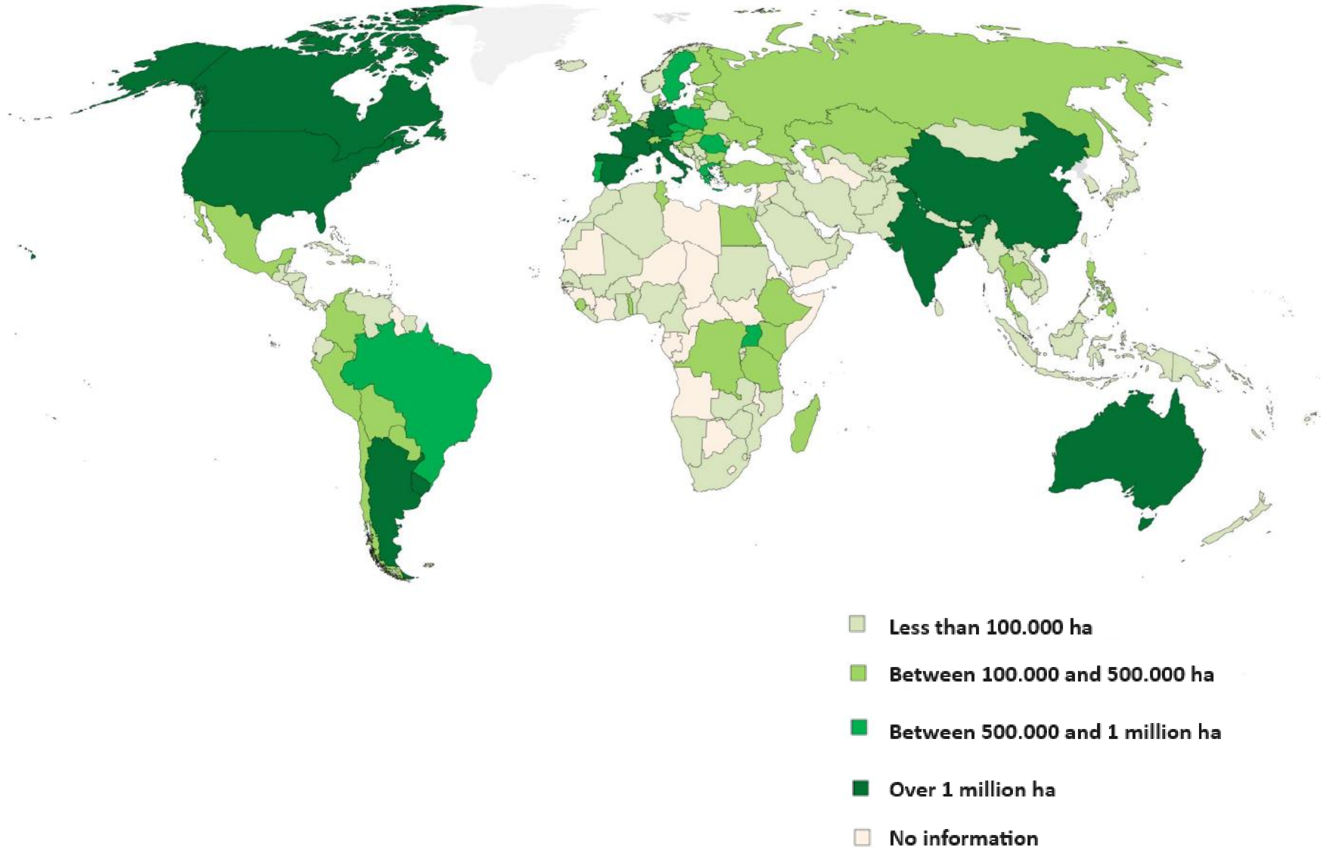
1- The agreement between the USA and Japan on plants dated from 2013.

Organic Farming is growing around the world.

Areas grown organically worldwide.

- According to FIBL/IFOAM[1], the global area grown organically (certified and in conversion) amounted to 96.4 million hectares late 2022, i.e. an increase of 26.6% compared to late 2021. This is exceptional growth.
2.0% of global agricultural land was grown organically late 2022, compared to 0.3% in 2000. Between 2000 and 2022, the global area grown organically increased 6.4 times.

Organically grown areas and organic farms worldwide late 2022

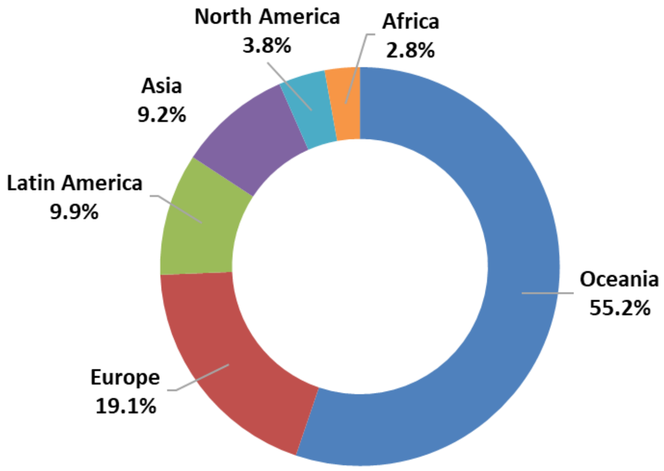


Source: Agence BIO from FIBL/IFOAM's data

- In 2022, 55% of organic areas were located in Oceania and 19% in Europe.

1- The data in this chapter comes from the 2024 edition of the Organic World publication from FIBL and IFOAM.

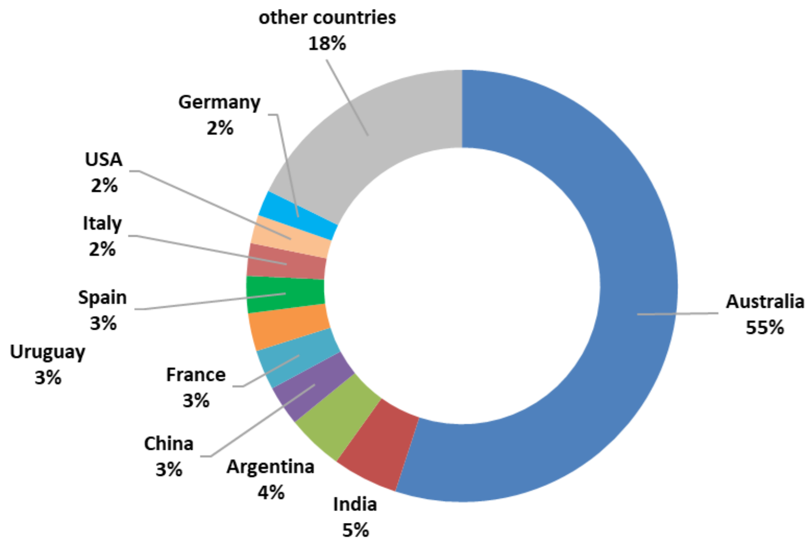
Breakdown of global organically grown areas by continent in 2022



Source: FIBL/IFOAM

■ In 2022, Australia represented 55% of the world's organic areas in 2022. The top ten countries represented 82% of organically grown areas in the world.

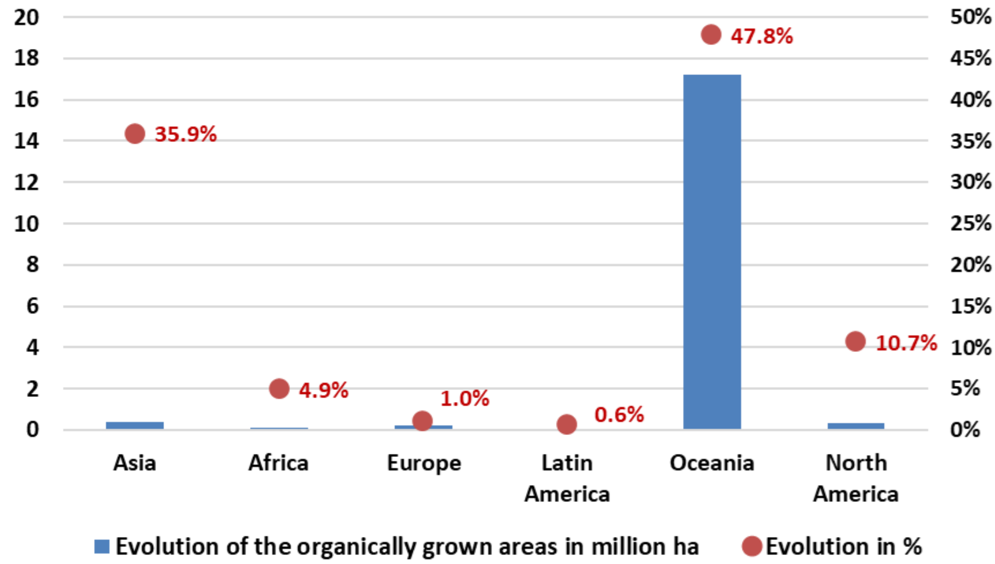
Breakdown of global organically grown areas by country in 2022



Source: FIBL/IFOAM

■ In 2022, the increase in agricultural areas grown organically took place in all continents. It was nevertheless much stronger in Oceania (Australia) than in other continents.
Over the past ten years, the strongest growth happened in Oceania and Europe.

Evolution of the areas grown organically by continent between 2021 and 2022



Source: Agence BIO from FIBL/IFOAM's data

- Australia and India were the countries with the biggest increases of the organically grown areas in 2022 with, respectively, +17.3 million ha and +2.07 million ha.

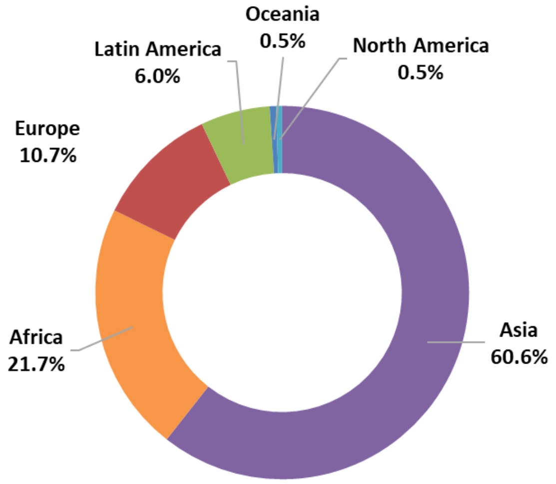
Russia has been the country with the biggest decline in 2022, with almost half a million hectares less compared to 2021.

Organic Farms

- 4.5 million certified organic farms were identified in 2022, an increase of 25.6% compared to 2021. This increase is mainly due to India.

Between 1999 and 2022, the overall number of organic farms increased 22.5 times.
In 2022, nearly 61% of organic farms were located in Asia and nearly 22% in Africa.

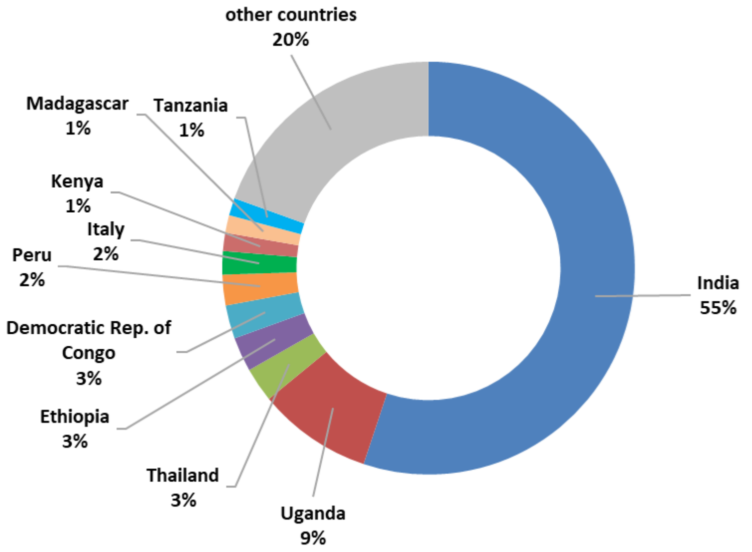
Breakdown of organic farms by continent in 2022



Source: FIBL/IFOAM

■ In 2022, the countries with the most organic farms were India and Uganda.

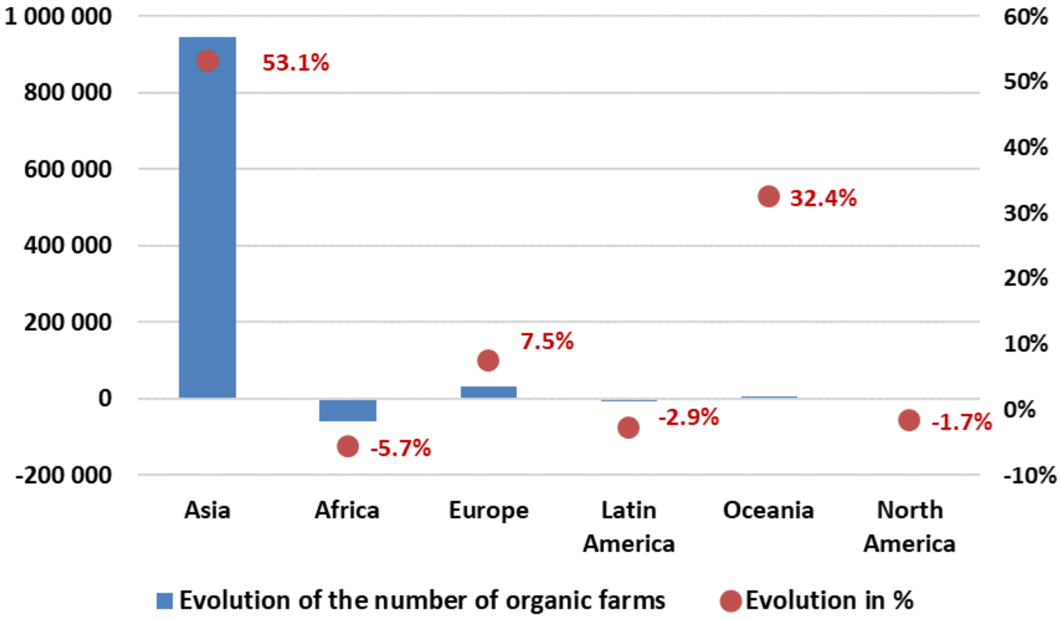
Breakdown of organic farms by country in 2022



Source: FIBL/IFOAM

■ In 2022, the number of organic producers increased in Asia, Europe and Oceania, but declined in Africa and Latin America and, to a lesser extent, in North America. Over the past 10 years, the strongest increase has been observed in Asia. Only Latin America saw its number of organic farms decrease over the decade.

Evolution du nombre de fermes bio par continent entre 2021 et 2022

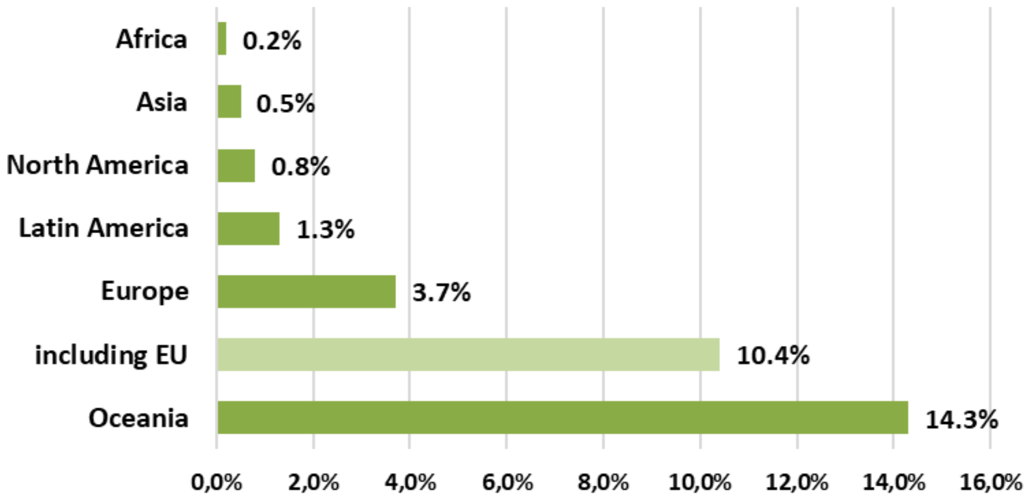


Source: Agence BIO from FIBL/IFOAM's data

The Organic Share

■ From one continent to another and from one country to another, organic farming occupies a very different share of the agricultural area. In 2022, Oceania remained the continent with the highest organic share.

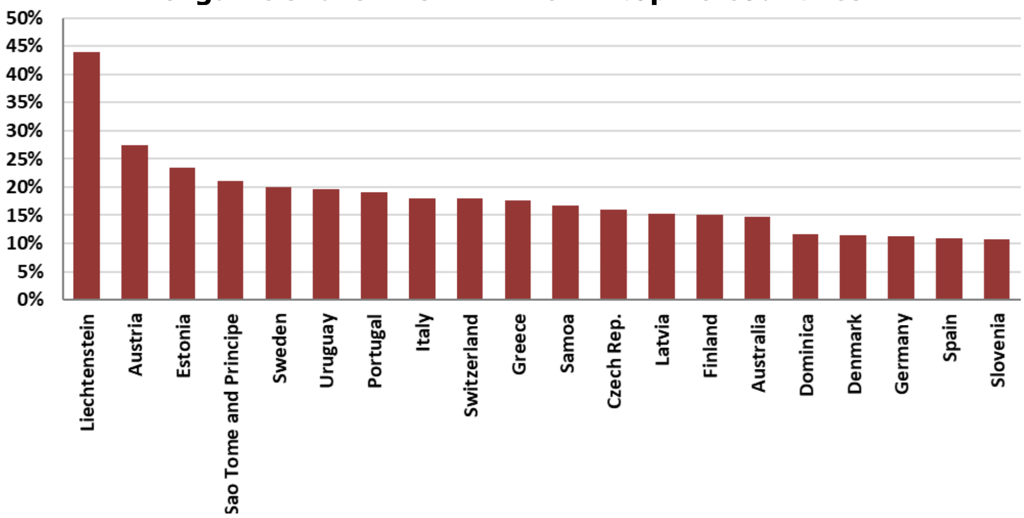
Share of organically grown areas in the Utilised Agricultural Area (UAA) by continent in 2022



Source: FIBL/IFOAM

In 2022, the share of organic agriculture in the national UAA exceeded 10% in twenty-one countries, including fourteen EU countries.
In 2022, France was in fifth position in terms of areas grown organically and twenty-first in terms of the share of organic in the UAA.

Organic share in UAA in 2022: top 20 countries



Source: FIBL/IFOAM

■ Non-agricultural organic areas (mainly dedicated to picking and beekeeping) represented 34.6 million ha in 2022. They have increased 8.4 times since 1999. In

2022, 42% of these areas were located in Finland[1], in India and Zambia. The flagrant, aromatic and medicinal plants are the main products of wild harvesting.

Processors, importers and exporters of organic products

- In 2022, over 119,600 organic processors have been identified by FIBL/IFOAM. However, the actual number of organic processors is greatly underestimated because many countries have not provided figures, including the United States of America.
Europe was the continent with the most organic processors in 2022 (91,775), ahead of Asia (12,969) and Latin America (9,658). 1,973 organic processors were identified in Canada in 2022[2].
France, Germany and Italy were the EU countries with the most organic processors in 2022.

- Over 8,400 organic importers were identified in 2022 (excluding the USA), including 7,609 in Europe and 676 in Asia. Their number is underestimated.

- Over 8,400 exporters were identified in 2022 (excluding the USA), including 4,885 in Europe, 1,302 in Africa and 1,178 in Latin America.

1- Mostly berries

2- Most organic processors are located in Quebec, Ontario and British Columbia.

Consumption of organic products worldwide

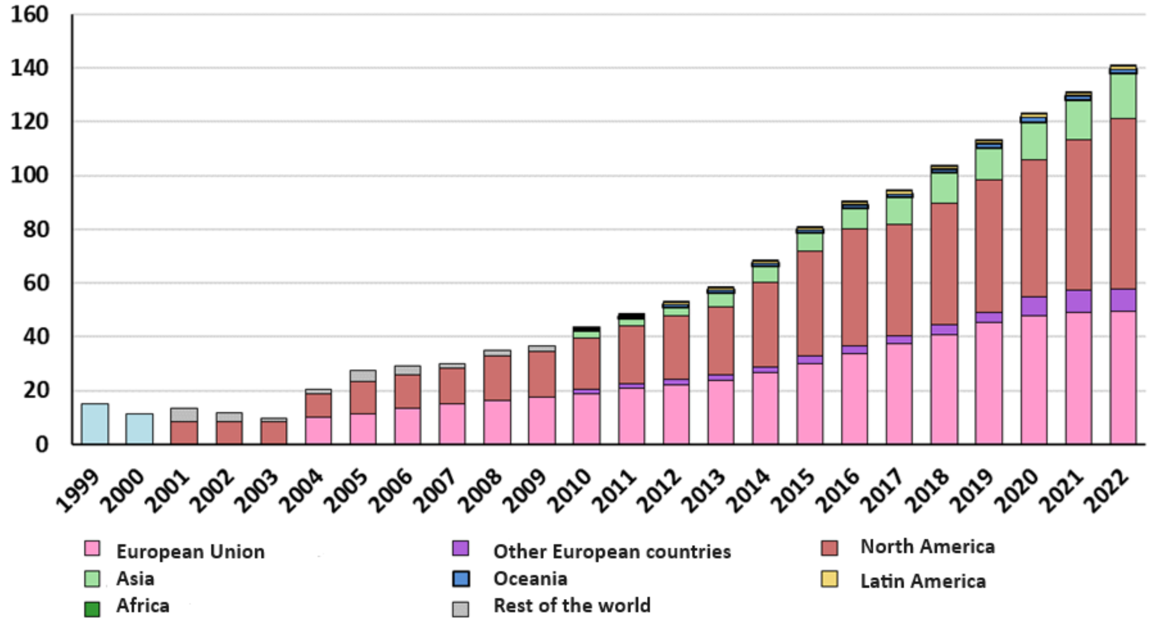
The Global Organic Market

- The main reasons for purchasing organic products highlighted by studies are health concerns, environmental protection, food safety and quality. The pandemic has increased the importance of health in food choice.

- The global organic food market has increased more than nine-fold in twenty-three years, approaching €141 billion in 2022[1]. The increase compared to 2021 is estimated at around 7%.

- In 2022, North America and Europe represented nearly nine-tenths of global organic consumption. North America remained the main area for organic consumption in 2022, with 45.1% of the global organic market, ahead of Europe (40.9%) and Asia (11.9%).

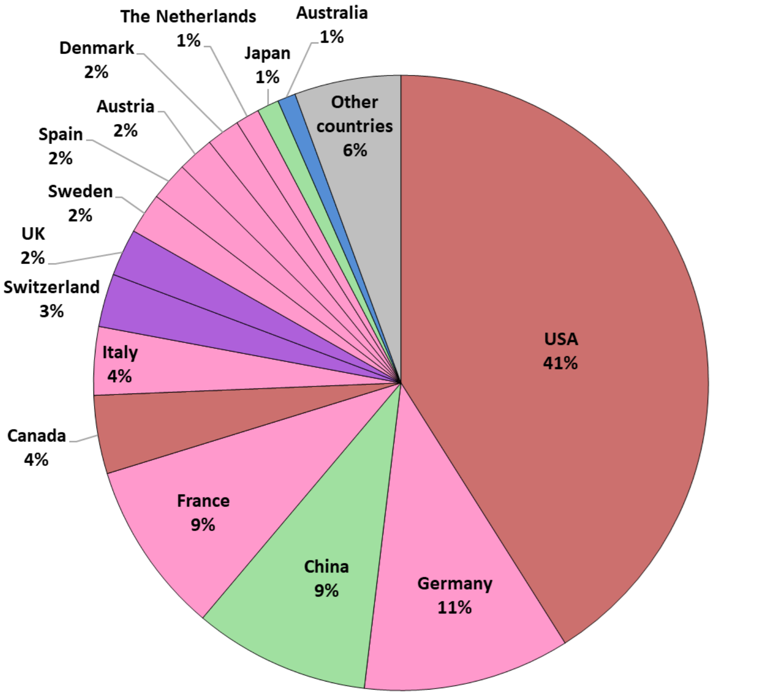
Evolution of the global organic food market between 1999 and 2022 (in € billions)



Source: Agence BIO

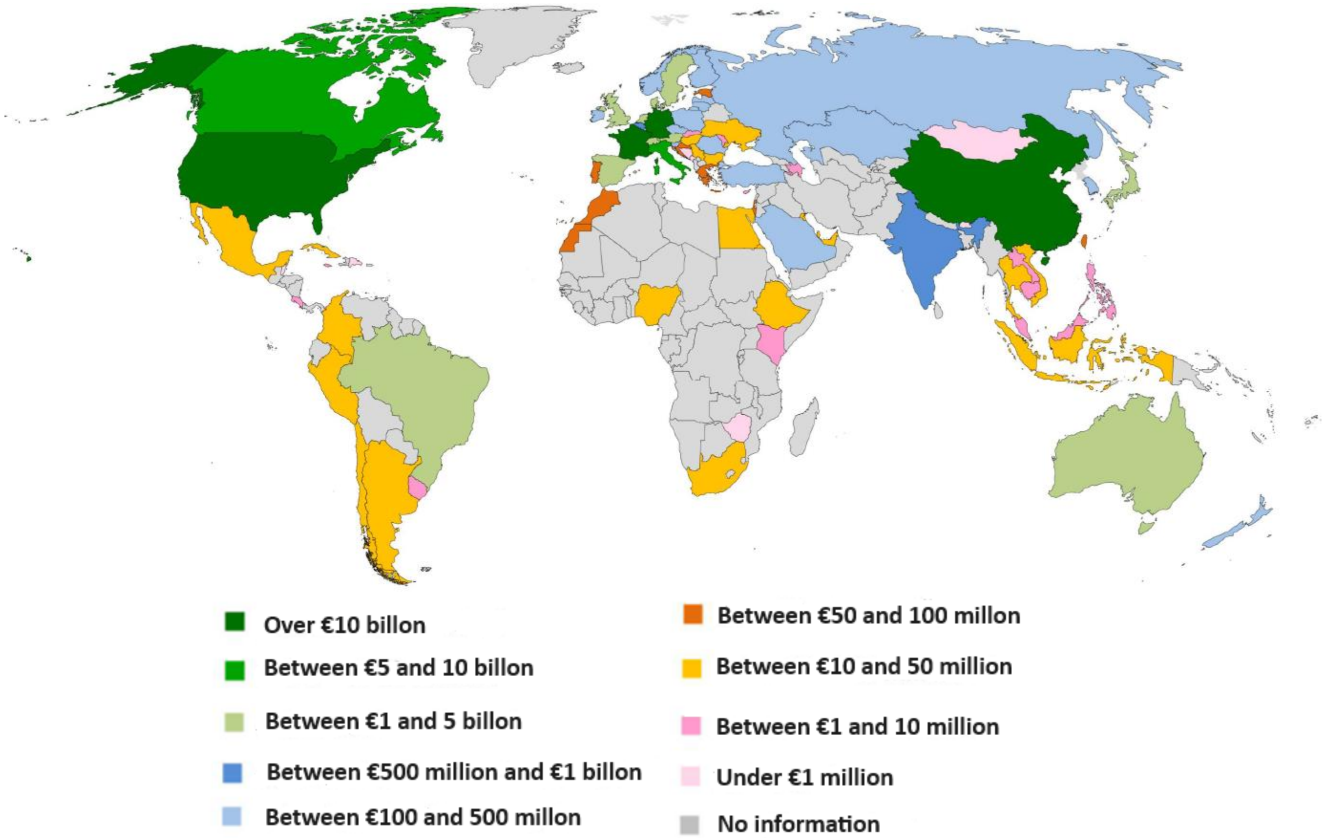
1- The global organic market is underestimated because data is not available for all countries in the world. Our figures differ from those in the FIBL/IOFOAM's report because it counts canteens and restaurants separately and because we found additional or more recent data.

Main organic markets in 2022



Source: Agence BIO

Organic markets in the world in 2022



Source: Agence BIO

Organic Markets by Continent

North America: 45.1 % of the global organic market in 2022

- The United States of America was in first position with 41.0% of the global organic market in 2022, i.e. over €57.8 billion, up 4.3% compared to 2021. In 2023, the US organic market grew by 3.5%. Thus, it has more than doubled in ten years. Organic products represented 6% of the food market in 2022.

According to the Organic Trade Association, in 2022, the organic market grew despite challenging headwinds: inflationary pressures that reduced consumer purchasing power, supply chain disruptions caused by the pandemic and global political events, a proliferation of competing food labels in supermarket aisles, and a labour shortage acutely felt by organic producers.

In 2023, market growth was mainly due to inflation, but there was still an increase in volumes sold.

Mass distribution is the main sales channel for organic products. The main chains all offer organic products under private labels and have expanded their organic ranges in recent years. Around three-quarters of conventional products have an organic alternative in mass distribution, especially thanks to organic products under private label. There are several organic chains, the largest being Whole Foods Market[1], Trader Joe's, and Sprouts Farmers Market. The marketing of organic products in other channels has also developed, in particular at farmers' markets, through deliveries and online (mainly via Whole Foods Markets, Fresh Direct and Thrive Market). An increasing quantity of organic products is being introduced into restaurant and canteens. Nearly three-quarters of US daycare centres use organic products.

In 2023, fruits and vegetables remained the leading category of organic products sold in the USA, followed by groceries, drinks[2], then dairy products and eggs.

82% of US households reported purchasing organic products at least occasionally in 2022, according to the Organic Trade Association.

Generations Y and Z are showing a growing interest in organic products. According to Ecovia Intelligence and Mintel, Millennials represents over half of the US organic market. 40% of people from this generation consider buying organic products to be an integral part of their lifestyle.

The organic market is more developed in California, New York, Boston and Chicago, urban areas with strong purchasing power. California is also a region where organic production is developed.

Health, avoidance of GMOs and nutritional value appear to be the main reasons for purchasing organic products. The pandemic has reinforced health as the primary criterion for purchasing organic food. Environmental protection increasingly appears to be an important motivation. The main obstacle is the price.

1- This store offers over 37,000 organic references. It was bought by Amazon in 2017.

2- On top: coffee

■ The Canadian organic market was estimated at €5.8 billion in 2022, an increase of 9.7% compared to 2021. Organic represented 3.3% of the Canadian food market in 2022.
Generations Z and Y are those who buy the most organic products. In 2020, organic products represented 46% of Generation Z's weekly purchases and 32% of those of Millennials.
In 2020, two-thirds of Canadians purchased organic products weekly.
Ontario is the largest province in terms of the size of its organic market, while British Columbia has the highest organic sales per capita.
Mass distribution remained the main sales channel for organic products in Canada. Organic products have become essential. In 2020, 82% of consumers of organic products regularly purchased them in supermarkets. Organic products have their own shelf in all major retail chains, and this is often placed in the central aisle. The space dedicated to organic products is increasing in this channel (particularly in Loblaws and Provigo stores). Organic distribution is growing. The US chain Whole Foods Markets is also present in Canada. There are also a number of more local channels like Rachelle Béry in Quebec. The many health food stores also sell organic products. In 2020, 32% of consumers purchased organic products directly from farmers. Direct sales by basket subscription systems are growing, especially in Quebec. The online organic sales are growing. In 2019, the organic share in canteens and restaurants remained under 2%.
Fresh fruits and vegetables remained the favourite organic products of Canadian consumers, ahead of dairy products and eggs.
The main reasons for purchasing organic products are health, environment, quality and animal welfare. The poor understanding of the term organic by some consumers constitutes an obstacle. The Canadian organic market is dependent on imports.

Europe: 40.9% of global organic consumption in 2022

■ In 2022, among the top ten global organic markets, seven were in Europe. The European market for organic products amounted to €57.6 billion in 2022.
Organic distribution is much more developed in Europe than in the rest of the world. However, in recent years, mass distribution has been responsible for most of the growth in the European organic market. Most European supermarket chains now offer organic products under private labels. The use of organic products in catering has grown in many European countries.

Organic Markets in the European Union

■ In 2022, the EU organic market amounted to over €49 billion, almost stable compared to 2021. It represented 35.0% of the global organic market in 2022.

■ The war between Russia and Ukraine has had a significant impact on the economies of EU member states which have had to face very high inflation rates in 2022 and 2023, with rates not seen since the transition to the euro, more than twenty years ago. According to the European Central Bank, however, not all inflation can be explained by the direct effects of the war. The rise in corporate profits notably played an important role in the growth of inflation, especially from the third quarter of 2022. EU consumers have become more price sensitive, and their purchasing power has weakened across the region. This of course had a negative impact on organic purchases which saw volume declines in many countries. There has been a shift in organic sales, in particular towards hard discount stores and private labels.

■ In Austria, the organic market reached €2.69 billion in 2022, an increase of 6.5% compared to 2021. The share of organic in food purchases was 11.1% in 2022.

According to AMA, 97% of Austrians purchased organic products at least once in 2020.
In 2022, mass distribution remained the main sales channel for organic products (79% of the organic market), with a strong share of hard discount. All the mass distribution chains have created organic private labels. Organic sales in mass distribution increased by 5.3% in value in 2023 compared to 2022. The only organic chains are of German origin: Denns BioMarkt and Basic.
The main consumers of organic products are elderly households and families with young children.
Dairy products, eggs, fruits and vegetables are the most popular organic products.
Health is the main reason for purchasing organic products, ahead of regional origin.

■ After an increase of 4.6% in 2021, the Belgian organic market fell by 2.5% in 2022, reaching €955 million[1]. Inflation has pushed Belgian consumers to buy fewer organic products. In 2022, the organic market share was 3.7% in value (5.0% in Wallonia and 2.4% in Flanders).
In 2021, 98% of Belgians purchased an organic product at least once. Organic consumption is higher in Wallonia than in Flanders. In 2022, Wallonia remained the main consuming region of organic products with 43.5% of the organic market, compared to 42.7% for Flanders and 13.7% for Brussels. Wallonia has more organic farmers, organic areas and organic shops than Flanders. Brussels is home to more singles, wealthy families and two-income households with a growing interest in organic products.
Mass distribution remained the main sales channel for organic products in 2022. It offers many organic products under private label. Organic shops came in second place. In 2020, Belgium had nearly 700 organic shops. Online sales and drives seem to be developing more slowly than in France.
Families with children and wealthy retirees are the biggest organic consumers, while singles are the category that allocates the largest share of their food budget to organic products.

1- Non-food included

The Belgian organic market returned to growth at the start of 2023. This is explained in particular by a drop in inflation and a re-listing of organic products in mass distribution.
Vegetables, dairy products and fruits are the most popular organic products in Belgium.
Health is the main reason for purchasing organic products, ahead of product quality and planet protection. Price remains the main obstacle to organic market development.

- In Bulgaria, the organic market was estimated at €37.8 million in 2022 (probably underestimated). The organic market share was greater than 1% in value in 2022. The organic range is increasingly diversified. In 2021, mass distribution represented 70% of the Bulgarian organic market. All the chains have developed their organic ranges in recent years, mainly under private label. They often have sections dedicated to organic products. There are around 200 organic shops with a wider range than supermarkets. Some are part of small chains like Balev Bio, Zoya and Zelen. Online sales have become increasingly important in the sale of organic products. It already represented 4% of the organic market in 2021. The main brand is Ebag. It is also possible to find organic products at Sofia's weekly farmers' market. The use of organic products in canteens and restaurant is very little developed. In the 2022-2023 school year, organic products began to be introduced as part of the school fruit and milk program.
Infant products, drinks, snack products and dairy products are the main categories of organic products sold.
Health and environmental protection are the main reasons for purchasing organic products.

- The Croatian organic market was valued at €99.3 million in 2018. The organic market share exceeds 2% in value.
Organic products are sold in supermarkets, in organic shops[1], in direct sales, at farmers' markets and online. The organic range in mass distribution has been expanding for several years, especially in fruits and vegetables.
However, most of the supermarkets organic products are imported. All the main mass distribution chains have developed an organic range under private label.
Millennials are more interested in organic products than previous generations.
Fruits and vegetables are the main organic products purchased.
Health and food safety appear to be the main reasons for purchasing organic products, while the price and consumers' lack of knowledge about organic products constitute the main obstacles.

- The Cypriot organic market amounted to around €10 million in 2019. Even though organic products are gaining popularity, the pace of development of the organic market is still slow. Around 6% of consumers regularly make organic purchases.
There aren't many organic shops yet. They are generally independent. Some organic shops have opened an online shop. Supermarkets and convenience stores offer fresh organic products. Organic products are also sold on the farm. There is no restaurant with organic products.
Young consumers are more interested in organic products than their elders.

1- There are several small chains of organic shops.

Health is the first reason for purchasing organic products. The main obstacle is the high price of organic products, given the limited supply[1].

- In 2021, the Czech organic market reached €240 million (+2.8% vs. 2020). The organic market share approached 1.8% in value in 2020 (compared to 1.5% in 2019). Supermarkets remained the main sales channel for organic products in 2020 (32%), ahead of online sales[2] (22%), organic shops and health food stores (15%), drugstores (15%), direct sales (6 %), pharmacies (5%), canteens and restaurants (3%) and independent grocery stores (less than 2%).

Mass retail has increased its organic range, especially under private labels. All major retail chains have an organic range. Most organic shops don't sell only organic products, but also natural, farm products and delicatessens. The organic sales have developed in urban markets.

Around 60% of organic products consumed in the Czech Republic are imported.

The typical organic consumer is more likely a woman, aged 20 to 59 and living in a large city. Prague is the main area for organic consumption, ahead of South Moravia and the Zlín region.

The most popular organic products are baby food, fruits and vegetables and dairy products.

The main obstacle to organic consumption development is the price. Inflation has increased price sensitivity. Furthermore, Czech consumers have little knowledge on organic products and their confidence is limited. The fact that organic shops sell both organic and non-organic products does not make buying organic easier.

- The Danish organic market decreased by 2.7% in 2022, reaching €2.46 billion. The organic share in supermarkets and online decreased from 12.7% in value in 2021 to 12.0% in 2022 and 2023. In 2023, organic sales in Danish supermarkets fell by 2.3% compared to 2022, with, however, a positive fourth quarter. The decline in the organic market is explained by the increase in prices and a reduction in supermarkets organic range.

In 2022, 77% of Danes consumed organic products. The Danes go on consuming organic products but are moving down the range in terms of price.

Mass distribution is the main sales channel for organic products, with 85% of market share in value in 2022. The economic crisis has reinforced the weight of hard discounters and private label brands in the organic sales. Netto is the leading distributor of organic products in Denmark, ahead of REMA 1000 and SuperBrugsen. Together, these three chains represented over half of organic retail sales in 2022. Canteens and restaurants have once again become the second marketing channel for organic products, as before the pandemic. In 2022, it represented 12% of the Danish organic market. Public kitchens represented 41% of out of home catering organic turnover in 2022. Organic distribution is poorly developed in Denmark, but health food stores and delicatessens sell organic products. Sales at markets and on farms represent only a small part of total organic sales.

1- This organic market is strongly dependent on imports.
2- Including the online stores of organic producers.

Urban families with children are the main buyers of organic products.
Fruits and vegetables and dairy products were the two main organic categories sold in 2020.
Preserving health is the first reason to purchase organic products, ahead of environmental protection and animal welfare. The price is the main obstacle.

- In Estonia, the organic market amounted to €98 million in 2022 and the organic market share was 4.6% in value.

Mass distribution remained the main channel for organic products. It offers a large and growing organic range. There are around forty independent organic shops and around ten online shops with organic products.
Organic consumption is much higher in urban areas than in rural areas.
Health and food safety are the main reasons to purchase organic products. The price is an obstacle to the organic consumption development.

- The Finnish organic market decreased by more than 8% in 2022, then by 6.1% in 2023, reaching €352 million. Pro Luomu believes that organic market growth will resume when inflation stabilizes. The increase in organic prices slowed down late 2023, except for some categories of products such as cereals and dairy products.

In 2023, the organic market share fell to 1.9% in value (compared to 2.2% in 2022).
According to Kantar, 92% of Finns bought an organic product at least once in 2023. 30% of Finns bought organic products at least once a week.

Supermarkets remained largely dominant in organic distribution. The three major chains sell organic products, especially under private label. From 2022, consumers have turned more towards private label organic products than before. There are independent organic shops in Finland's main cities, but no organic supermarkets. Organic products are also sold in wellness stores and health food stores. Some markets offer organic products. Consumers can also buy organic products from farmers through the REKO system. Online organic sales do not seem to have taken off.
Organic products consumption is more developed in large cities. Families with children remained the largest purchasing group for organic products in 2023. Young people are more interested in these products than previous generations.
The organic products most purchased by Finns are fruits, vegetables and dairy products.
The main reasons for purchasing organic products are the "purity" of organic products[1], flavour, respect for the environment, health and animal welfare, while price and lack of availability are the main obstacles to market development. The price obstacle strengthened in 2022 and 2023 with inflation.

1- i.e. fewer chemicals and additives

■ France was the third largest market organic market worldwide in 2022. It approached €12.8 billion in 2022 (-3.6% vs. 2021) with a market share (excluding canteens and catering) of 6.1% in value. According to the Agence BIO/ObSoCo Barometer, 54% of French people declared having consumed organic products at least once a month in 2023 (compared to 60% in 2022).

Mass distribution remained the leading sales channel in 2022, ahead of organic shops and direct sales. In 2022, organic sales fell in supermarkets (-4.7%), in organic shops (-8.6%) and for craftsmen-shopkeepers (-2.6%) but increased in direct sales (+ 3.9%) and in canteens (+18,0 %) and restaurants (+16.2%). The years 2022 and 2023 were marked by high inflation. The organic range in mass distribution decreased by 12% between December 2021 and December 2022. Drive and convenience stores are the two sub-channels of supermarkets with the biggest organic range decline in 2022[1].
The organic range under private label went on increasing slightly in mass distribution in 2022, while that under national brands declined. 2,826 organic shops were identified late 2023. Their number has decreased in recent years. In France, the organic channel has been developed for a long time. France is even a pioneer in this field since it is in this country that the first chain of organic shops and the first organic supermarkets were born.
Fruits and vegetables are the main organic products consumed in France.
The main reasons for consuming organic products are the preservation of health, the quality and taste of the products, the preservation of the environment and animal welfare. Price remains the main obstacle to organic market growth. The pandemic has increased interest in local products, sometimes to the detriment of non-local organic products.

■ Germany was in second place globally with 10.9% of the organic market in 2022. After an increase of 5.8% in 2021, the German organic market fell by 3.5% in 2022. In 2023, it returned to growth in value with +5.0%, reaching €16.08 billion (excluding canteens and restaurant). The organic market share in value has declined in recent years, from 6.8% in 2021 to 6.3% in 2022 and 6.2% in 2023.
In 2022 and 2023, Germany experienced high inflation, however, the prices of organic products remained generally more stable than those of conventional products. Due to this inflation, German consumers have placed more importance on the price of organic products than before.
National organic brands continued to lose market share to organic private labels.
In 2023, mass distribution (including hard discounters and drugstores) remained the main sales channel for organic products with 67% of the German organic market and its organic sales increased by 7.2%. In 2021, Edeka[2] became Germany's leading distributor of organic products, overtaking Aldi. Supermarket chains go on developing their organic ranges under private labels. In 2022 and 2023, discounters went on

1- These are the two channels which had expanded their ranges the most with the pandemic and lockdown.
2- Leading German retail group

expanding their organic ranges. They plan to continue this development in 2024 and 2025. In 2023, sales of organic distribution stagnated (+0.2%). In 2022, the number of organic shops was around 2,200. Denn's Biomarkt was the main organic chain with 319 shops late 2022, ahead of Alnatura. Two-thirds of organic shops have an area greater than 100 m². Sales of other channels[1] increased overall by 1.8% in 2023.
The most purchased organic products are eggs, dairy products, vegetables and fruits. According to the 2022 organic barometer, 36% of those surveyed stated that they frequently purchased organic products, including 3% exclusively.

Animal welfare remains the main reason quoted for purchasing organic products, ahead of a diet that is as natural as possible. The fight against climate change also appears to be an important reason for buying organic products. According to the Thünen Institute, the main reasons for purchasing organic products among 18–30-year-olds are to treat themselves and take care of their body.

- The Greek organic market was estimated at €95 million in 2020. Inflation over the last two years has had a negative effect on the organic market.

Mass distribution is the main channel for organic products, ahead of organic distribution. There are several organic chains. Biologiko Xorio has sixteen shops. There are also a number of markets with organic produce. The organic ranges online and in canteens and restaurants remain very modest.
The main reasons for purchasing organic products are the non-use of chemical additives, natural treatments and health. The price and the lack of confidence in organic products are the main obstacles.

- The Hungarian organic market was valued at €30 million in 2015. Mass distribution is the leading marketing channel for organic products with around a third of the organic market. Almost all chains have an organic range, most often under private labels. A quarter of supermarket customers buy organic products at least once a week. Organic products sold in supermarkets are mainly imported. Online sales of organic products are growing. There are around 600 organic shops in Hungary. They represent 13% of the organic market. Organic products are also sold in markets.

Fruits and vegetables are the most popular organic products in Hungary.
The main organic consumers are wealthy residents of Budapest and its surroundings.
The main obstacles to consumption are price and lack of confidence.

- In Ireland, the organic market reached €235 million in 2020. The organic market share was 2.7% in value in 2020.

In 2023, one in two young buyers[2] said they would like to increase their organic consumption.

1- Bakeries, butchers, greengrocers, open-air markets, direct sales, online sales, service stations and health food stores
2- 18 to 35 years old

In 2020, mass distribution remained the main channel for organic products. Most chains have created organic private labels. The other channels are direct sales, delicatessens, health food stores, online and organic shops. Many delicatessens sell large quantities of organic products. Mass distribution offers a wide range of organic products. There are still relatively few organic shops, but their number is growing.

High-income retirees and Irish Millennials are significant consumers of organic products.
The most popular organic products are carrots, bananas, milk, yogurt, eggs, beef and porridge.
The main reasons for buying organic products are health benefits, the environment (including climate change), animal welfare and the fact that there is no synthetic chemical used to produce them.
The main obstacles to organic purchases are the price, the still fairly limited organic ranges and still insufficient consumer awareness.

■ During the year ending the 3rd of July 2023[1], the Italian organic market grew by 7.8%, amounting to €5.45 billion. In 2023, the organic share in supermarkets was 2.9% in value.
In 2023, 90% of the population aged 18 to 65 have purchased an organic product at least once according to Nomisma.
Mass distribution[2] remained the main marketing channel for organic products in 2023, ahead of canteens and restaurants, then organic shops. Organic sales in supermarkets increased by 5% compared to the previous year. The increase was stronger in hard discounters than in supermarkets and hypermarkets. All chains have an organic range. The organic range under private label is important. The main retail chains for organic sales are Coop, Iper and Carrefour. In 2023, sales of organic shops increased by 4.5% compared to 2022. Italy had 1,291 organic shops in 2020. In recent years, Italian organic distribution has been undergoing profound change: the number of shops is decreasing, chains are merging and there are fewer completely independent shops than before. Only one organic chain is established nationally: NaturaSí. 58% of Italian organic shops are located in the North of the country. Organic in canteens and restaurants increased by 18% during the year ending in July 2023. 547 websites had an organic range in 2020. A large number of organic farms practice direct sales.
Organic consumption is more developed in the north of the country.
In Italy, the most consumed organic products are fruits, dairy products and vegetables.
Food safety is the main reason for purchasing organic products, ahead of environmental protection.

■ The Latvian organic market was valued at €105 million for 2019. Organic products represented 1.5% of the food retail sales in 2019.
Mass retail started selling organic products about fifteen years ago. Their organic range (particularly under private label) and organic visibility in supermarkets have progressed in recent years. Organic departments have been created. Rimi is the

1- We consider this to be 2023 in the overall calculations.
2- Hypermarkets and supermarkets represented 63% of organic sales products in mass distribution in 2022.

leading seller of organic products in Latvia. There is an organic chain: Biotēka (eleven outlets) and a number of independent shops. Some organic products are sold directly, in markets[1] or through consumer purchasing groups. It is also possible to buy organic products online.
Health is the main reason for purchasing organic products and price is the main obstacle.

- In Lithuania, the organic market was estimated at €120 million in 2020. The organic share remained under 1% in value in 2019.
In 2020, 14% of Lithuanians bought organic products at least once a week and 34% at least once a month.
Several mass distribution chains have an organic range, including RIMI, which sells organic products under private labels. The Lithuanian organic range is growing in supermarkets. There are three organic chains. They also have online shops.
Organic consumers are essentially city dwellers.
The most popular organic products are fruits, vegetables, dairy products, cereal products and baby food.
Health is the main reason for purchasing organic products. This has been reinforced by the pandemic. The lack of understanding of the term organic and the price represent the main obstacles.

- The Luxembourg organic market fell by 16.8% in 2022, reaching €164 million. The organic market share fell to 8.2% in value in 2022 (compared to 11% in 2021).
Organic distribution is relatively well developed. The country has around thirty organic shops, but this channel has been experiencing a crisis since the pandemic. Consumers are turning more towards mass retailing, in particular towards discounters. Lidl and Aldi have expanded their organic ranges in recent years. Organic products are also available directly from farmers and in catering. Luxembourg school canteens has been using more organic products since the start of school year 2021/2022.
Fruits and vegetables are the organic products most purchased by Luxembourgers.

- In Malta, there is indeed a local demand for organic products, but the size of the organic market is not known.
Organic products are sold in different distribution channels: supermarkets, organic shops, direct sales and online.
Fruits and vegetables are the main organic products purchased by Maltese consumers.

- In the Netherlands, the organic market is estimated at more than €1.8 billion for the year 2022. The organic share in supermarkets rose to 4.4% in value in 2022.
In 2022, 96.4% of Dutch households purchased organic products at least occasionally.
Mass distribution represents around 73% of the organic market. Organic sales in supermarkets increased by 36% in 2022 compared to 2021. Supermarket chains have organic ranges of between 50 and 1,000 references. Their organic range under private label is growing. Currently, there are around 315 organic shops in the Netherlands, with a range of between 5,000 and 9,000 references. In recent years, organic distribution has been subject to increased competition from large retailers and the

1- They are very popular in Latvia.

resulting pressure on prices. There are a number of online organic shops. Organic products are also sold directly and used in canteens and restaurants. The organic sales among artisans and in delicatessens is also growing.
Organic products are mainly purchased by households with children with above-average income, people with two incomes and wealthy retirees.
Fresh fruit and vegetables, potatoes, eggs and dairy products are the main organic products purchased in the Netherlands.
The main reasons for purchasing organic food are animal welfare and environmental protection, while price constitutes the main obstacle to organic consumption development.

- The Polish organic market was estimated at €310 million in 2022, but the organic market share remained under 1% in value. In 2021, around half of Poles purchased organic products.
Mass distribution represented the leading organic sales channel (around half of the Polish organic market). A few years ago, its organic range was quite modest. It has developed in particular with the introduction of organic products under private label, whether in supermarkets, hypermarkets or hard discounters. All supermarket chains have created an organic private label. Currently, over 7,000 stores offer organic products. Private labels can represent up to 60% of a store organic range. Around 900 organic shops were counted in 2020. However, their number decreased in 2022. Organic shops are mainly located in large urban areas[1]. The largest organic chain is Organic Farma Zdroxwia. There are also many independent shops and around 150 online organic shops. The largest, Organic24.pl, was opened in 2020. Organic products are also sold in markets[2]. A few weekly organic markets have emerged in large cities, such as the Biobazar in Warsaw. Organic products are also available at grocery stores, convenience stores, drugstores and gas stations. Restaurants with organic products are not very common.

The Polish range only covers 30% of the Polish organic market (essentially little or no processed products).
The main organic buyers are wealthy families with children and retirees with good incomes.
Fruits and vegetables are the main organic products purchased by Poles.
Health and food safety are the main reasons for purchasing organic products. Price is the main obstacle to organic consumption development.

- In Portugal there is no overall estimate of the organic market, but organic sales of packaged products and drinks were estimated at €60.5 million in 2017. Nearly two-thirds of Portuguese people buy organic products.

1- With a recent shift towards cities of less than 100,000 inhabitants
2- Farm sales are very rare in Poland for tax reasons.

In recent years, local organic demand has increased significantly. This has led to the development of organic distribution, organic markets and the supermarkets organic ranges, especially at Aldi, Lidl and Continente. Mass distribution is the main sales channel for organic products. In recent years, the organic range under private labels has developed in supermarkets[1]. The two largest organic chains are Celeiro and Go Natural. Organic shops are mainly located in large cities. Several Lisbon restaurants offer organic products. There are eleven organic markets, mainly located in the Lisbon region. The first was created in 2004. Organic products are also sold online and through basket subscription systems.

Organic consumers are mainly city dwellers. Millennials are more interested in organic products than their elders.
The main organic products consumed are vegetables and fruits.
Health is the main reason to consume organic products.
The price, as in many countries, is a significant obstacle to organic consumption development. Inflation has accentuated this. The over-packaging of organic products in supermarkets is also seen as a significant obstacle.

- The Romanian organic market would have exceeded €250 million in 2022.

In 2019, organic products represented only 1.2% of food sales in supermarkets, while this channel constituted over two-thirds of the Romanian organic market. However, most supermarkets chains have a growing organic range, many of which are under private labels. Organic products are presented in dedicated sections. Lidl is the leading place to purchase organic products, but it is Cora and Kaufland which have the widest organic ranges (over 700 organic references).
A small share of products sold in markets are organic. Organic shops are still rare. However, there are several small organic chains (Naturalia2, Paradisul Verde, RealFoods and BioCorner). They are mainly present in large cities. Online organic sales are growing, especially through organic distribution. Some restaurants in Budapest and other large cities offer organic products.
Romania imports between 80% and 90% of the organic products it consumes, mainly from Western Europe.
Families with children are the main buyers of organic products.
Dairy products are the main organic products sold, ahead of eggs and baby food.
The main reasons for purchasing organic products are health and environmental protection. The main obstacles to organic consumption development are price sensitivity, the lack of information among Romanians on the benefits of organic products and the fact that many organic products are imported. The health crisis has indeed strengthened Romanians' interest in local products.

- The Slovak organic market was estimated at €4 million in 2010, i.e. only 0.2% of the food market. Consumers are in fact more interested in dietary products than in organic products.

In Slovakia, Supermarkets began selling organic products in 2003. Most major retailers have a small organic range, often under private labels. In 2010, Slovakia

1- Continente began selling private label organic products in 2020.
2- Nothing to do with the French chain.

already had around a hundred organic shops. As in the Czech Republic, organic shops do not only sell organic products. They are mainly located in Bratislava and in the western part of the country, which is the richest. Most organic chains also have an online shop. The German drugstore chain DM also sells organic products.
Organic consumers are mainly residents of large cities such as Bratislava, Košice, Žilina, Trenčín, Banská Bystrica and Zvolen.
Price remains the main obstacle to organic market development.

■ The Slovenian organic market was estimated at €110 million in 2021. The organic market share was between 3 and 4% in value in 2021. The direct sale of organic products is relatively developed, whether on the farm, on the markets[1] or online. Organic products are also sold in organic shops, supermarkets and drugstores. Nearly 90% of organic products sold in supermarkets are imported.
Slovenians are not sufficiently aware and informed about organic products.

■ The Spanish organic market grew by 3.8% in 2022, then by 6% in 2023, to reach €3 billion. The organic market share exceeds 2.5% in value.
According to Ecovalia, 93% of Spaniards consumed an organic product at least once in 2023 and 43% at least once a week.
Mass distribution represented 50% of the Spanish organic market in 2023, organic distribution 34%, canteens and restaurants 7%, direct sales 4% and online sales 3%. The organic range in mass distribution is very developed, especially under private label. Lidl is the leading distributor of organic products in Spain, ahead of Carrefour and Aldi[2]. The main organic supermarket chain, Veritas, has 80 shops.
The two regions with the biggest organic consumption are Catalonia and Andalusia, they represented 38% of the Spanish organic market in 2023.
Generations Y and Z are the main categories of organic consumers.
In 2023, plant-based foods remained the best-selling organic products in Spain.
Health and environmental protection are the main reasons for purchasing organic products.

■ The Swedish organic market has been estimated at over €3 billion in 2023 (+0.9% vs. 2022). The organic market share was 7.8% in value in 2023[3].
In 2023, mass distribution remained the leading channel for organic products in Sweden (50.7% of the organic market), ahead of the monopoly Systembolaget (22.9%), canteens and restaurants (22.6%) and online (3.2%). In 2023, organic sales fell by 0.8% in mass retail[4] and by 19.4% online. On the other hand, they increased in other channels with +13.9% for farm sales, +6.3% in public canteens, +5% in the monopoly and +1.8% in restaurants.
The main categories of organic products sold in Sweden are fruits, vegetables and dairy products.
The main reasons for consuming organic are health, environmental preservation and animal welfare. Price is the main obstacle to the development of the Swedish organic market, followed by the difficulty of finding some organic products in supermarkets.

1- An organic market takes place in the capital every Wednesday.

2- The main supermarket chain, Mercadona, still does not offer organic products.

3- Down compared to 2022, because sales of conventional products have increased more than those of organic products.

4- The first three quarters of 2023 were marked by a drop in sales of organic products in supermarkets.

Organic Markets in the other European Countries

- Inflation has not spared the rest of Europe.

- The Albanian organic market is relatively undeveloped, with production oriented towards export. Organic products are available in supermarkets and in some organic shops in Tirana. However, with the exception of herbal teas, all the products sold there are imported. A few local products shops sell Albanian organic products. There are some organic farms that practice agrotourism. The most popular organic products in Albania are fresh fruits and vegetables, meat, dairy products, fruit juices and olive oil. The term organic is not sufficiently understood by consumers.

- In Belarus, the organic market is still modest. There are a few organic shops, mainly in the capital.

- In the Federation of Bosnia and Herzegovina, although the national law on organic agriculture and the national register of organic producers are not yet in place, organic production is growing. Organic products, local and imported, can be found in supermarkets, in some organic shops, in markets and online. Some high-end restaurants offer organic products on their menu. The most popular organic products are fresh fruits and vegetables and processed products.
The organic market is not very developed in the Republic of Srpska. There is no shop selling only organic products. Organic products are sold in shops with traditional and regional foods, in sections dedicated to organic in supermarkets and directly by farmers.
In these two parts of Bosnia and Herzegovina, the main obstacles to organic market development are the low purchasing power of consumers and insufficient awareness of the values and benefits of organic products. Health appears to be the main reason for consuming organic products.

- In Georgia, organic consumers are mainly located in the three main cities: Tbilisi, Batumi and Kutaisi.
Supermarkets go on trying to set up organic sections. Their organic ranges are mainly constituted with imported products. The supply of local organic products is too rare and seasonal to develop an attractive range for supermarkets. Tbilisi has a few organic shops. Online organic sales are growing. It is only possible to find organic products in restaurants in trendy establishments in eastern Georgia. Tbilisi has at least 3 totally organic restaurants.
The main obstacles to organic market development are the lack of consumer awareness, low availability of products, difficulties for producers to obtain inputs and the price of organic products.

- In Iceland, organic demand remains limited, but is growing. Most organic food consumed is imported, because national production is relatively modest (vegetables, milk, eggs and meat). Most supermarkets have an organic section. Icelandic consumers are still poorly informed about the benefits of organic products. The price also remains an obstacle to organic market growth.

- In Kosovo, organic market development is slow. The organic products available in stores mainly come from imports. In recent years, organic products have gained popularity among Kosovars because of their “healthy” image.

There are two organic shops in the capital.
The most purchased organic products are baby food and tea.
Food safety appears to be the main reason for purchasing organic products. The main obstacles to market development are the price and poor knowledge on organic products.

■ Organic products are becoming increasingly popular in Moldova. However, the market was still only worth €1 million in 2020. Products certified according to EU regulations are sold in supermarkets, while those certified according to the Moldovan standard are sold on the market of Chisinau. Until 2019, there was a limited number of organic products in supermarkets, but this has increased significantly. Totally organic sections are sometimes presents in supermarkets. Kaufland is the chain with the most complete organic range[1].
Some online stores like Arome Bio mainly sell imported organic products. Several home delivery services for organic vegetables have emerged, such as Ecovillage Farms and Ecoparadis. There are a few organic shops, but they are rarely totally organic.
Young mothers are the main buyers of organic products. Due to low purchasing power, price remains the main obstacle to market development.

■ In Montenegro, the organic market has grown in recent years, however, the most organic products are still imported. Organic products are mainly sold in organic shops, quite recently in supermarkets and directly by farmers (mainly on the farm). Most organic shops are located in Podgorica. These shops mainly have a processed products range. It is also possible to buy organic products in health food stores, drugstores and online.

■ In Norway, the organic market is less developed than in other Scandinavian countries, however, organic products are increasingly popular. In 2022, the organic market was estimated at €485 million. In 2021, the organic market share amounted to 3% in value. The Norwegian organic market could exceed €1 billion by 2030.
In 2019, 30% of Norwegian consumers reported eating organic food once a week or more and 4% reported eating it daily.
In 2020, mass retail remained the main sales channel for organic products (59%), ahead of the Vinmonopolet monopoly (a third of the market), bakeries (4%), and canteens and restaurants (4%). Hard discount represents nearly 60% of supermarket organic sales2. The Coop and Rema 1000 brands saw an increase in their organic sales during the health crisis. The monopoly has expanded its organic range in recent years. There are organic shops, but they are small, and their organization is not very structured. Most of them are independent. With its fourth shops, the Røtter chain is an exception. In recent years, a few new organic shops are emphasizing local shopping and reducing packaging. Health food shops also sell organic products. Late 2019, there were already eighty REKOs. Online sales were relatively underdeveloped until recently due to a very high density of stores and the habit of Norwegians to go shopping nearby several times a week. The two main online organic shops are Økoland and Dyrket.
Urban women with young children constitute the main category of organic buyers.

1- But it seems that all its organic products come from abroad.
2- The rest is mainly sold in supermarkets because there are very few hypermarkets.

The main organic products sold in Norway are groceries, dairy products, fruits and vegetables.
Environmental protection and health are the main reasons for consuming organic products. The main obstacles to the development of the organic market are the price and the lack of availability of local organic products. In fact, organic areas have been in decline since 2013, probably due to insufficient support for conversion, while consumption is growing. The number of organic processors is also decreasing. Conventional local products are often preferred to imported organic products. Consumers also seem insufficiently informed about organic products.

- In the Republic of North Macedonia, the organic market is still small and very dependent on imports. Organic products are sold in supermarkets, organic shops, drugstores (German chain DM), direct sales and online. Most supermarkets belong to foreign chains which prefer to sell imported organic products rather than those produced in Macedonia because it is easier for them in terms of supply. Besides, supermarkets take fairly high margins on organic products because they consider that their sales will not develop quickly.

During the fruit and vegetable production period, fresh products represent the most of organic sales, while processed foods are the main organic products consumed in winter.
The price of organic products remains a major obstacle to market development. There is a problem of lack of availability and poor logistics organization for supplies. The benefits of organic products are not sufficiently known to Macedonians.

- The Russian organic market is still modest. In 2021, it amounted to €239 million.

In 2020, around 3% of Russian households regularly purchased organic products.
We have little information on the Russian organic market since the start of the war.
Before the war, mass distribution was the leading sales channel with around half of the Russian organic market, ahead of organic distribution (between 20 and 25%), sales in markets (a little over 15%) and online. (a little over 10%). There are organic sections in Auchan, Perekrestok, Giper Globus and Tabris stores.
In other supermarkets, organic products are placed near conventional products. The high-end supermarket chain Azbuka Vkusa has an organic range of around 70 products. The sale of regional organic products has developed from 2020 in the Republic of North Ossetia-Alania and in the Kemerovo region in Siberia, in Kalina Malina stores.
Organic purchases mainly take place in Moscow (around 70% of the Russian organic market) and St Petersburg. In these two cities, organic shops and restaurants with organic products are developing. Moscow has around twenty shops with between 40 and 90% of their range with organic products and Saint Petersburg has four shops. There are both independent stores such as Season Market and chains like Ugleche Polje. A number of organic shops also sell online. The prices remain quite high in organic shops.
In Russia, women with children made up 40% of organic buyers.
Russian consumers are mainly interested in fresh organic products (dairy products, meat, fruits and vegetables).
Health is the main reason for purchasing organic products in Russia. A third of consumers aspire to a healthier lifestyle. Russian consumers are increasingly placing on healthy and sustainable products and less and less on brands.
The main obstacles to the development of the Russian organic market are lack of confidence, price and lack of availability.

■ The Serbian organic market was estimated at €16.6 million in 2019. In recent years, the organic range has been developing more quickly.
Mass retailing has become the leading distribution channel for organic products in Serbia. Its organic range is growing. Organic departments have been created. A significant share of their organic range is imported (especially for products of animal origin). Organic distribution is mainly located in Belgrade and Novi Sad, in the north of the country. In the capital, the organic chain, Idea Organic, was created in 2017 and currently has 8 shops. Organic products are also sold in markets. There are two large, completely organic markets: one in Belgrade (Block 44 opened in 2011) and the other in Novi Sad. Some farmers also sell their production directly on their farm. Some restaurants in the capital have introduced organic products into their menus. Online organic sales[1] has grown significantly in recent years.
In Serbia, organic consumers are mainly urban because purchasing power is higher in the city. Parents of babies and young children are more interested in organic products than the rest of the population.
The most consumed organic products are fresh fruits and vegetables, vegan products and dairy products.
Health and food safety are the main reasons for purchasing organic products. The main obstacles to market development are price and low consumer awareness on organic products. Besides, the Serbian organic sector is still poorly structured, and some kinds of organic products are not yet produced locally.

■ Switzerland is the main European organic market outside the European Union. After declining by 3.3% in 2022, the Swiss organic market increased by 5.2% in 2023, to reach €4.4 billion. The organic market share in retail rose to 11.6% in value in 2023. Switzerland ranks first in the world for organic consumption per capita (€446 in 2022). In 2022, 54% of Swiss households purchased organic products several times a week. As in many other countries, consumers wish to be able to buy products that are both sustainable and local.
Mass distribution remained the main sales channel for organic products in 2022. Organic sales fell less there than in other channels (-1.8%). This channel is dominated by two chains which represented almost three-quarters of the organic market in 2022: Coop and Migros[2]. In organic distribution, the drop was 14.5% in 2022 compared to 2021. Organic distribution is mainly established in German-speaking Switzerland. In direct sales, organic sales fell by 16.5% in 2022. Online sales have become more important in recent years. For several years, some cities, such as Lausanne, Bienne and Zurich, have been trying to develop the use of organic products in public canteens. Lausanne wishes to achieve a 70% share of organic products in public catering. Even though the consumption of organic products is very developed in Switzerland, there are still few restaurants with organic food.
The main categories of organic products purchased by the Swiss in 2022 remained fruits, vegetables, cereal-based products and dairy products.
The absence of pesticide residues and animal welfare are the main reasons for consuming organic. The main obstacles are the high price of organic products, the low share of organic in canteens and restaurants and the overpackaging of organic products.

1- Generally by organic shops, but also by organic producers.
2- Leading retail chain in Switzerland

■ In Turkey, the organic market exceeded €130 million in 2021. The number of points of sale with organic products is increasing. Mass distribution[1] is the main channel for organic products and the one with the largest organic range, although still relatively modest. Migros Turk, the leading supermarket chain, has an organic range with 100 products. The organic range seems smaller in other chains. The supermarkets with the most organic products are located in large cities and tourist coastal towns. Organic sales in mass retail are growing, especially for processed products.
The weekly open bazaars in Istanbul, Bursa and Izmir also constitute an important distribution channel for organic products (fresh fruits and vegetables and cereals). There are also thirty organic bazaars where products are sold directly by farmers. The first to be created is in the Sisli district of Istanbul. There are few organic shops with a wide range. The main ones are CityFarm (first Turkish organic chain), Yom, Taze Masa and Tire Milk Cooperative. Most organic shops are located in Istanbul, but it is also possible to find them in other major cities. Online organic sales are growing. Most organic consumers belong to the wealthy classes of large cities. Basket subscription systems are developing there because consumers wish to have direct contact with producers.
The main organic products sold in Turkey are eggs, fruits, vegetables, rice, dairy products, baby food and olive oil.
In Turkey, the main reasons for consuming organic products are the naturalness of the products, health and environmental protection. The main obstacles to organic market development are the lack of consumer confidence and the price.

■ In the United Kingdom of Great Britain, the organic market grew by 2% in 2023 compared to 2022, amounting to €3.65 billion. The organic market share remained quite modest (1.8% in value in 2021). In 2023, 85% of Britons have purchased organic products.
In 2022, the growth of the organic market was linked to the sharp increase in canteens and restaurants (+152%), thanks to the return of consumers to this channel after the height of the pandemic. In 2023, the rise in the organic market was driven by an increase sales of 2.7% in value in supermarkets[2]. However, this is linked to inflation.

Mass retail remained the leading distribution channel for organic products with a 62.3% market share in value, ahead of home deliveries (16.6%) and independent distributors (15%). In independent businesses, organic sales increased by 9.9% in 2023. Home deliveries saw their organic sales decrease by 6%. In canteens and restaurants, organic sales remained stable compared to 2022. The main supermarket and hypermarket chains for organic distribution are Waitrose, Sainsbury's and Tesco. The two hard discount chains, Aldi and Lidl, have expanded their organic ranges. The interest of discounters in organic products has pushed traditional

1- In recent years, several hard discount chains have appeared on the Turkish market.
2- After a decline of 2.7% in 2022.

large retailers to consider the presence of organic products in their food range as compulsory. Online sales represented 22% of supermarket organic sales[1] in 2023.
Organic demand is greater in London and the South of England than in the rest of the United Kingdom.
In Scotland, Scottish Organic brand products and agritourism are contributing to the organic market growth.
In 2023, dairy products, fruits and vegetables represented 48% of organic sales by value in supermarkets and 56% of volumes sold.
Health remains the main reason for purchasing organic products, ahead of environmental protection. Price remains the main obstacle. Young Britons, especially Millennials, are increasingly buying organic products because they wish to know the origin of their food and are willing to pay more for products that respect the environment and animal welfare.

■ Organic products began to be sold in Ukrainian stores in the late 2000s. The organic market was estimated at €14.4 million in 2022. It declined compared to 2021 due to the war.
Since the start of the war, organic demand has logically weakened, and supply chains have been disrupted. The purchasing power of Ukrainians has rapidly declined. Some shops had to close.
At the start of the 2020s, only 5% of consumers knew what an organic product was. Before the war, people in big cities were more interested in organic than those in rural areas. Their main reason for purchasing organic products was health. They were increasingly willing to pay more to buy them.
Before the war, the main distribution channel for organic products was the supermarkets. Silpo was the first chain to introduce an organic range, in 2010. There were also organic shops in large cities, the main one being Eko-lavka, and online sales had developed. The organic range was still far from complete; however, it was progressing significantly, especially in mass distribution. Organic products were available in most stores. Some supermarkets had set up "health" sections with, in particular, organic products. It was possible to find organic products in some restaurants, but it was not very common. However, there was a development in the supply of organic alcoholic drinks, mainly wine, in restaurants.
The main organic products that were consumed in Ukraine were dairy products, vegetables and fruits.
The two most important obstacles were the lack of awareness on organic products and the price.

Asia: a strong growing market

■ The Asian organic market has experienced strong growth in recent years. It is estimated at over €16.8 billion in 2022. Asian consumers are seeing their income increase, which gives them easier access to quality products. They are increasingly aware of ecological and food safety issues. The absence of legislation on organic products in a certain number of countries, however, still hinders the development of consumption.
China and Japan are the two main organic markets in Asia.

1- Ocado and Amazon are counted with supermarkets.

- In Armenia, the organic market still remains extremely modest. There is an organic shop in Yerevan. It also has an online store. Some organic products are also sold in Carrefour supermarkets.

- In Azerbaijan, the organic market is not very developed, mainly due to the absence of a national standard. It was valued at €3 million in 2015. It is only possible to find a few processed organic products in supermarkets (processed fruits and drinks). The local organic association, GABA, tried to set up an online sales platform, but this was not successful.

- The Bangladeshi organic market is still very recent. Organic products are available in some supermarkets in the capital and other large cities. Some organic farmers sell on the farm. Organic vegetables are offered to hotel guests in tourist areas. Lack of consumer confidence remains the main obstacle to market development.

- In 2022, China was the third largest organic market globally and the first in Asia with over €13 billion, but organic products still represented only a modest share of the food market.
Mass distribution is the main channel for organic products (three-quarters of the market); however organic distribution (independent or network) and direct sales are growing. Large retailers have expanded their organic ranges in recent years. Organic shops are now located in all major Chinese cities. There are several organic chains such as Jenny Lou's and BHG. Several markets offer organic products. The Beijing organic market, created in 2010, takes place three times a week and has around fifty sellers. There are subscriptions to organic baskets. In recent years, online trade, which is very developed in China[1], has largely stimulated organic sales (especially for fruits and vegetables).
The use of organic products in public catering is growing.
Since 2013, the processing of organic products has been developing to satisfy the domestic market.
In 2022, 64% of Chinese people have purchased an organic product at least once. Organic consumers are mainly urban dwellers and Millennials. Organic food consumption is mainly located in Beijing, Shanghai, Shenzhen, Guangzhou, Chengdu, Hangzhou, Chongqing, Wuhan, Xi'an, Suzhou, Tianjin, Nanjing and Ningbo.
Due to food security concerns and increasing incomes, residents are increasingly turning to organic products. These are considered healthy, qualitative, fashionable and modern. Consumers pay attention to food labels and are interested in press articles on health. They are also increasingly concerned about water quality[2]. Other reasons for purchasing organic products are environmental preservation, animal welfare and taste. However, Chinese consumers still remain relatively poorly informed about organic products (only a quarter of the population knows them well). Price appears to be another obstacle, even if Chinese are increasingly willing to spend more to buy organic products when they have sufficient knowledge of their benefits. Processed products represent the bulk of the Chinese organic market. Infant food products and dairy products are the main categories of organic products consumed in China.

1- China is the country where online food trade is the most developed.

2- Water pollution is a major environmental problem. The central government has introduced a ten-year plan to purify water resources nationwide.

- In India, the organic market would have exceeded €700 million in 2020.

Most of the supply is distributed in urban areas. The organic market is growing mainly thanks to the city dwellers demand, who are increasingly numerous[1]. The latter are willing to pay higher costs for organic products, while residents of rural India are less aware of the benefits of these products. Bangalore is the city where the consumption of organic products is the most developed. The number of organic shops is growing rapidly. However, mass distribution remains the first distribution channel for organic products. These products are now very present there. Online organic sales are growing quite quickly. Some hotels and restaurants offer organic menus.

For several years, the Indian press has been raising awareness among the population about the importance of eating healthy food. Organic products are therefore gaining popularity. Indians are increasingly aware of the environmental and health benefits of organic products. Health is the main reason for purchasing organic products. Millennials are more interested in organic products than the rest of the population.

Price constitutes the main obstacle to the development of the Indian organic market, even if the purchasing power of Indians has increased in recent years. Other obstacles are the mismatch between supply and demand and the lack of availability. Fruits, vegetables and cereals are the organic products most purchased by Indians.

- In Indonesia, the organic market was estimated at €14.3 million in 2021. In recent years, it has grown further thanks to the sale of organic products online. However, this phenomenon only concerns residents of large cities. A few organic shops exist in large urban areas. A growing, although still limited, number of organic products are sold in supermarkets (notably rice and coffee).

The expatriate community is the main consumer of organic products because their price is often an obstacle for the rest of the population. Besides, Indonesian consumers have little awareness of organic products.

Rice and coffee are the main organic products sold.

- In Iran, the distribution of organic products has grown over the last decade. The country has numerous organic shops, spread across over fifteen provinces. Mass distribution also sells organic products. It is also possible to purchase them online.

- The Israeli organic market has been estimated at nearly €83 million in 2021 (+3% vs. 2020). Organic products are becoming increasingly popular with consumers. Organic distribution is the leading sales channel for organic products. There are several organic chains. The largest are All Organic Ltd and Anis Teva. Large retailers have introduced organic ranges under private labels. As in other countries, mass distribution has created organic departments. Israelis are price sensitive but increasingly willing to pay more for quality.

- The Japanese organic market was in second place in Asia with over €1.6 billion in 2022.

In 2022, almost a third of Japanese people bought organic products at least once a week.

Organic products are mainly sold in organic shops, in mass distribution, at farmers' markets, in restaurants and online. There are several organic chains and independent shops. Organic shops sell fruit and vegetables, dairy products, meat, fish, coffee and tea. The Supermarket chain Life brand has an organic and natural shop in the centre

1- Urbanization is growing rapidly and 45% of India's population will live in cities by 2030.

of Osaka: BIO-RAL. Major supermarket chains such as Aeon, Coop net and Life all have organic departments. Seventeen organic restaurants were recorded in 2019. Tokyo and Osaka have a number of organic cafes and shops. Rakuten and Amazon also sell organic products. Organic products are also sold through the Theikei, some kind of basket subscription systems.
The main organic products consumed in Japan are vegetables and rice.
Mid- to high-income families with children appear to be the main consumers of organic products.
The Japanese organic market is developing relatively slowly, in particular due to the lack of availability of Japanese organic products, a still underdeveloped distribution network for organic products, consumer confusion between organic and "natural" and the habit of Japanese people to eat washed and calibrated fruits and vegetables. The price also seems to be an obstacle to organic market development. Health and food safety are the two main reasons for purchasing organic products in Japan.

- In Jordan, organic products are sold in supermarkets, organic shops, drugstores, directly by farmers and online[1]. It is also possible to find organic products on many markets. In the capital, a weekly organic market is held.

- In Kazakhstan, most people are not familiar with organic products. Demand remains relatively low. There are few shops selling organic products. When they are available, they are not grouped in the same place, therefore difficult to find. Organic products sold in stores are imported. Organic demand is nevertheless expected to grow in large urban centres.
Lack of awareness of the advantages of organic products constitutes the first obstacle to market development.

- In Kyrgyzstan, consumers do not fully understand what organic products are and their benefits. Besides, price always plays a crucial role in purchases.

- In 2017, Kuwait's organic market was estimated at €16 million. Some markets offer organic products. Fresh fruits and vegetables are the main organic products consumed. The first reason for consuming organic products is health.

- There seem to be a few organic shops in Laos, especially in the capital.

- Organic products are increasingly popular in Lebanon. However, this country is very dependent on organic imports.
Around twenty organic shops have been identified, including three from the French chain La Vie Claire. Organic departments have also been installed in mass distribution. The organic range offered in hypermarkets is progressing. Organic products can also be purchased at farmers' markets and health food stores. The organic basket subscription system is developing, as are online organic sales.
Fruits, vegetables, eggs, dairy products and bread are the main organic products sold in Lebanon.
The main obstacles to organic market development are the price and the lack of availability of some products.

1- Several organic producers and groups offer their products online.

- In Malaysia, the organic market is still quite modest. However, 39% of Malaysians purchased an organic product at least once in 2019. Awareness of organic products is increasing. Malaysians are looking for more healthy products than before, but the price and lack of availability are obstacles to organic market development.

For the moment, Malaysians mainly buy organic baby food products. Organic products are available in mass distribution and in some organic shops. The hypermarkets organic range is growing. Some stores have a small organic section. There does not seem to be any sale of organic products online.

It is mainly residents of large cities who buy organic products because of their higher incomes.

- In Mongolia, the organic market remains extremely modest. It was estimated at €0.6 million in 2022.

- In Myanmar, the share of consumers regularly purchasing organic products is still low. Interest in organic products only started to grow a few years ago. Most organic consumers are women.

There are a few shops selling organic fruits and vegetables. Two weekly organic farmers' markets were created in 2018 in Yangon and Mandalay. Some restaurants offer organic fruits and vegetables, especially those intended for tourists. There do not appear to be any certified organic products in supermarkets[1] in Myanmar.

The most popular organic products are fruits, vegetables, apple cider vinegar, coconut oil, turmeric and cinnamon. Some products are imported from foreign countries and others are produced locally.

Health appears to be the main reason for purchasing organic products. The lack of awareness about organic farming is the first obstacle to organic market development. Price is also a major obstacle. Organic products are often perceived as luxurious.

- In Pakistan, high-income consumers are those who buy organic products. The main reason for purchasing organic food is health.

- In the Philippines, the organic market is still modest. The supermarkets organic range remains limited. Organic products are also sold in health food shops.

Organic products are perceived as too expensive. Filipinos are little informed about the benefits of organic products.

- In Qatar, the market for packaged organic products has been estimated at €18.8 million in 2022.

The supermarkets organic range is growing, and organic departments occupy increasingly large areas. Organic websites offer home delivery of organic products, such as organicland.qa. Organic shops have also been opened such as Organic Grocery and Good Life Market.

1- All supermarkets in Myanmar belong to the same company which has several brands.

The most popular organic product categories in Qatar are snacks, fruits, bars with seeds and nuts, oils, flours and preserves.
Qataris, especially young people, are increasingly interested in organic products and aware of their benefits.
Health remains the main reason for purchasing organic products. The health crisis increased the awareness of the need to eat better.

- The Saudi organic market has developed well in recent years, reaching €325 million in 2022.
Even though organic products are increasingly popular with Saudis, regular consumers are still few in number.
Organic consumption is mainly located in large cities (Riyadh, Dammam, Al Khobar and Jeddah) because it is easier to find organic products in dedicated sections of large retailers and in some organic shops. In recent years, the number of organic shops has increased significantly. Organic supermarkets have been opened. Supermarket chains have developed their organic ranges.
Over 80% of organic food consumed in Saudi Arabia is imported.
People under thirty represented almost half of the country's population in 2021. This generation is very connected and seeks quality and healthy products.
Fruits and vegetables are the main organic products consumed in Saudi Arabia. Interest in organic dairy products, organic meats and organic infant food is growing.
The first reason for consuming organic products is health, a growing concern among Saudis. The reduced availability of organic products and the price are the main obstacles to organic market development.

- In Singapore, organic products are mainly purchased by expatriates, wealthy people and part of the Millennials. However, interest in organic products is growing. The organic market reached €36 million in 2021 (+16% vs. 2020). Organic products are mainly sold in supermarkets, but the number of organic shops is increasing. The main chain, Little Farms, was established in 2016.
The main organic products sold are baby food, rice, pasta, oils and frozen products (fruit and vegetables, meat and seafood). There is a growing interest in organic wines.
Price is the main obstacle to market development.

- The South Korean market is heavily dependent on imports. It was estimated at €485 million in 2022. According to Business France, it benefits from strong development potential due to the growing interest in organic products.
In recent years, distribution channels for organic products have diversified. Mass distribution remained the main channel for organic products. Mass distribution has a range of over 300 organic products which are sold in dedicated sections. Online organic sales are increasing year after year. The number of organic shops is growing. The main organic chains are Choroc Maeul, with over 400 shops, and Hansalim, with 200. Local grocery stores and markets also play a significant role in organic distribution. Organic products have also been introduced into canteens and restaurants.
The main organic products sold in South Korea are dairy products, infant food, fruits, vegetables and rice.
Health is the first reason to buy organic food. The main obstacles to organic market development are the price and consumers' poor knowledge on organic products.

- In Sri Lanka, organic products are increasingly popular. The organic range in supermarkets is still modest but is growing. Organic products are also sold online and at some farmers' markets. It is possible to find organic products in high-end restaurants.
The number one reason for purchasing organic products is health. Price constitutes the first obstacle to organic market growth. It is mainly Sri Lankans with high incomes who consume organic products.

- In Tajikistan, consumers do not fully understand what organic products are and what their benefits are. Price plays a crucial role in purchases.

- The Taiwanese organic market amounted to nearly €82 million in 2019. According to the USDA, it is expected to grow by nearly 50% between 2020 and 2050, thanks to the equivalency agreement concluded with the USA in May 2020. Taiwan has many organic shops. There is an online distributor of organic products: Greenbox.
The main reason for consuming organic products is health. The main obstacle is the lack of knowledge on organic products.

- The organic market is growing quite quickly in Thailand and reached €16.9 million in 2021. It is dominated by mass distribution, however, there is a supermarket dedicated to organic and health products. Supermarkets are increasingly offering organic products to meet demand. There is an increasing number of high-end restaurants using organic products.
Rice, tea, oil and pasta are among the most consumed organic products.
The main reasons for consuming organic are health, quality and environmental protection. Thai consumers are increasingly health conscious[1], especially Millennials. The growing affluent middle class is willing to increasingly spend on food that guarantees health quality and traceability. Price nevertheless remains the main obstacle to organic market development.

- In the United Arab Emirates, organic products are increasingly popular.
In mass distribution, the space dedicated to organic products has grown significantly over the last decade, and even more so since 2019. This is particularly the case in Carrefour supermarkets. Mass distribution is developing organic ranges under private labels. Organic chains are growing. Around fifteen organic shops were identified in 2019. The markets also offer organic products. Online organic purchases began to grow in 2020.
Emirati Millennials are increasingly interested in organic products as they attach great importance to eating healthy foods[2]. 16% of Emiratis have started eating organic since the start of the pandemic. Parents consider organic products to be a better choice for feeding their children. Consumption of organic products is mainly located in large cities.
Emiratis' favourite organic products are fruits, vegetables, eggs and dairy products.

- In Vietnam, an increasing number of big cities stores are offering organic products. Large retailers (including convenience stores) are the main places to

1- Thai agriculture is a heavy user of pesticides, causing health problems for the population.
2- The authorities promote “healthy eating” to counter obesity problems. Besides, there is a growing interest in product traceability following the health crisis.

purchase organic products. Several supermarket chains offer organic products under private labels. There are also a few organic shops in major cities.
Organic products are mainly purchased by urban families with children.
Like the Chinese, the Vietnamese are very concerned about food safety and the health effects of pesticides. This phenomenon is even growing. In the two large cities Hanoi and Ho Chi Minh City[1], 86% of consumers are willing to pay more for natural, organic and seasonal products.
Organic products enjoy a good image among the Vietnamese.
Powdered milk, dairy products, fruits and vegetables are the main organic products sold in Vietnam.
Price remains the main obstacle to market development, followed by the difficulties of finding organic products outside of large cities.

Oceania: Australia in the lead for organic consumption

- The Australian organic market has been estimated at €1.33 billion in 2022.

Around two-thirds of Australian households buy organic products, at least sometimes. In 2022, 35% of buyers of organic products increased their purchases of this kind of products compared to 2021. 53% of them purchased more organic fruits and vegetables than the previous year.
Even if the distribution of organic products is diversifying, mass distribution remained the main sales channel with three chains representing 70% of the market in 2022: Woolworths, Coles and Aldi. They offer a wide range of organic products, some of which are under private label. There are organic shops. The number of websites selling organic products has grown. Consumers also buy organic products in markets. Some canteens offer organic products, but there are no statistics.
The main consumers of organic products are wealthy households, Generation X, Millennials, students and people with university degrees, and families with a child under sixteen.
The main organic products consumed are fruits, vegetables, beef, ready meals and dairy products.
Two-thirds of Australians believe that organic production is better for the environment.
The main reasons for purchasing are environmental protection and health. The main obstacles are the difficulty in identifying that a product is truly organic and the price.

- The New Zealand organic market is much smaller. It was estimated at €172 million in 2022.

In 2020, 81% of New Zealanders purchased organic products at least once a fortnight.
Mass distribution is the main channel (69% of sales in 2020), ahead of organic shops (16%), other channels (14%) and direct sales (1%). Mass distribution chains have developed their organic ranges under private labels.
Fresh products represents around half of the organic market. The most purchased are fruits, vegetables and meat.
Women with children are the main category of buyers of organic products. The capital is the region with the most consumers of organic products.
Health remained the main reason for purchasing organic products. New Zealand consumers increasingly consider organic products to be safer and healthier than

1- Formerly called Saigon, it is the largest city in Vietnam and its economic heart.

conventional products, which contributes to sales growth and the launch of new products.
Price is the main obstacle to the development of the New Zealand organic market, ahead of the lack of availability at the point of purchase.

- In the Pacific Islands, the organic market is growing slowly. However, it should increase over the coming years, in particular thanks to the growing interest of the tourism sector in organic products. The Organic Pasifika brand is used to communicate on the use of organic products in the Pacific Islands.
Domestic organic markets are also developing somewhat thanks to basket subscription systems and sales at farmers' markets, especially in Niue and Samoa. For the moment, the organic market is more developed in Fiji than in the other islands of Oceania. Fiji opened its first shop dedicated to organic and sustainable products in 2018.
Coconut fresh and processed are the main organic products sold in the Pacific Islands. By far the biggest challenge is the cost of certification for small farmers to access regulated markets. A PGS offers a partial solution to this problem. Other obstacles are transport costs, pooling of supply in order to have stable and quality delivery, phytosanitary restrictions on inputs (seeds and plants) and exports.

Latin America: a still modest organic market

- A high share of organic production is exported. Nevertheless, a domestic market for organic products is developing in a number of countries.

- In Argentina, the organic market was estimated at €19.2 million in 2017, i.e. between 1 and 2% of the food market. In 2021, under 2% of national organic production was consumed in the country.
Mass distribution is the main sales channel for organic products. Direct sales of organic products seem to be growing.
Consumers perceive organic products to be of better quality and safer than conventional products.
The most consumed organic products in Argentina are mate and cereal-based products.

- In Belize, there is a basket subscription system managed by Pro-Organic Belize. It was created in October 2016.

- For several years, organic products have been introduced into collective catering in three Bolivian towns. Organic fruit and vegetable producers have created food platforms to deliver to consumers at fixed points. Orders are made through WhatsApp and other social networks. Agrobolsas Surtidas is one of the most active platforms. These distribution networks existed before the pandemic but have developed significantly with the health crisis.

- Brazil was Latin America's leading organic market with €1.1 billion in 2021. Despite Brazil's difficult economic situation, organic sales continue to grow, thanks to growing consumer interest in healthy and sustainable products.
The state of Sao Paulo is the one in which the organic market is the most developed. Two-thirds of organic sales are made in mass distribution, but the organic range is growing in all sales channels. Supermarket brands have created organic departments

and are developing their organic ranges under private labels1. It is also possible to buy organic products in over 800 markets, some of which are completely organic. The main organic chains are Mundo Verde and Bio Mundo. As in Bolivia, consumers can order organic products using the social network WhatsApp. Several states serve a lot of organic food in canteens, or even exclusively, like that of Sao Paulo. Some restaurants have started to offer organic products.
In 2021, vegetables and fruits remained the most consumed organic foods in Brazil. The main reason for consuming organic products is health. Then come environmental preservation and quality. The price[2] remains the main obstacle, followed by the lack of availability and variety in stores.
The main organic consumers are families with children and good incomes.

- Chilean organic market has grown significantly in recent years, mainly due to the population's growing interest in these more environmentally friendly products and healthy eating.
However, around 95% of organic production is still exported. The organic market was estimated at €14.8 million in 2020 (+10% vs. 2019). 40% of the organic market is supplied by Chilean products (mainly vegetables). The rest is imported.
Organic products are sold in supermarkets (particularly in Jumbo stores), in organic shops, online, in markets (including around twenty organic ones) and through basket systems. Short channels have a greater weight in the marketing of organic products than for conventional products. It is also possible to taste organic products in the restaurant.
Health, respect for the environment and taste are the main reasons for purchasing organic products. The main obstacles to organic market development are the perceived high price, the lack of awareness and information regarding organic products and insufficient control by the authorities over compliance with regulations.

- In Colombia, the organic market remains modest. It was estimated at €11.5 million in 2015. Coffee is the main organic product sold. Certified organic products can be found in several supermarket chains (like Carulla and Jumbo[3]), especially in Bogotá and in a few organic shops in cities such as Medellín, Cartagena and Bogotá. It is possible to find organic foods that are not certified or with participatory certifications at small outdoor farmers' markets in almost every major Colombian city.
It is mainly expatriates and Colombians with high incomes who consume organic products.
Fruits and vegetables are the organic products whose sales have increased the most in recent years.
Health appears to be the main reason for consuming organic products. The main obstacles to organic market development are the price, considered too high, the lack of promotion of organic products and the lack of clarity on what is organic.

- In Costa Rica, organic products are sold in hotels and restaurants, in supermarkets, in some organic shops, at farmers' markets, through basket systems and on the farm. The organic range in supermarkets is growing. On the other hand, organic products have not yet been introduced into canteens. The largest organic

1- In 2019, Carrefour Brazil's organic range already included 650 products.
2- According to the 2021 Organis survey, 67% of consumers found organic products too expensive.
3- They sell in particular organic products imported from Europe and the USA.

shop, Green Center, was created ten years ago. It is located in Escazú and sell over 4,000 organic references. The CR Organico application allows consumers to purchase organic products directly from producers.
The main organic products sold in Costa Rica are fruits, vegetables, dairy products, goat and beef meat and coffee.
Price is the main obstacle to organic market development.

- The Cuban organic market was estimated at €19.9 million in 2015.

- In the Dominican Republic, the organic market was estimated at only €90,000 in 2015.

- In Ecuador, there are over 1,000 organic references in mass distribution. The organic range seems to be growing rapidly. Organic products are also sold in markets, online and in some organic shops. The main organic products sold locally are bananas, cocoa, coffee, quinoa and vegetables. The obstacles to organic market development are the price and the lack of availability.

- In Guatemala, the organic market is still underdeveloped (98% of national organic production is exported), but consumers are increasingly interested in organic products. Health is the main reason for purchasing organic products.

- In Mexico, the organic market was estimated at €38 million in 2021. Organic still represents a tiny share of food sales. Consumers are increasingly interested in organic products. This phenomenon has been accentuated by the pandemic. The main consumers of organic products are seniors. There is an organic chain, The Green Corner.
Health[1] is the main reason for purchasing organic products. Price remains the main obstacle to the growth of organic sales.

- In Paraguay, the organic consumption has started to grow modestly in recent years. However, Paraguayans are still very little aware about the benefits of organic products.

- In Peru, there has been no assessment of the organic market since 2010, when it was estimated at €14 million. In this country, organic market growth is notably linked to the interest in gastronomy. It is possible to find organic products in markets, in organic shops (like Flaura & Fauna) and online (for example: Bio Point). The organic sales are growing in these last two channels.
However, most Peruvians are not really aware of organic farming and organic is often only associated with fruits and vegetables.

- In El Salvador, following the pandemic, interest in organic products has increased.

- In Uruguay, organic consumption also seems to be increasing. Organic products are sold in supermarkets, markets, organic shops and online.

1- Health is considered a national challenge.

Africa: a still relatively underdeveloped organic market

- Organic production is primarily intended for export.

- South Africa is one of the main organic markets in Africa. Sales of packaged organic products were estimated at €35 million in 2021.
Organic products are mainly sold in supermarkets. The Woolworths chain is the country's leading distributor of organic products and has a significant organic range, which is also the case for Pick n'Pay. Most other major chains also have an organic range. Organic products are also sold in organic shops and health food stores. There is only one real chain of organic shops: Wellness Warehouse. It has around thirty shops. The other shops are independent or belong to very small chains. The Dis-Chem drugstore chain, which has 170 shops, also sells some organic products. There are also many organic shops online, but they are not always profitable. South Africans also buy organic products from farms and markets. As the organic sector is very unstructured, local organic producers sell at local farmers' markets or sell baskets.
Organic products are mainly consumed by wealthier residents of large cities[1], especially Cape Town/Stellenbosch, Johannesburg/Pretoria and Durban.
Organic certifications made in the country are mainly made on the basis of foreign standards, for export.
Milk remains the most popular organic product, ahead of baby food products, pasta and rice.
The main obstacles to organic market development are the lack of knowledge and awareness among South Africans on organic products, the price and the lack of availability because most of the certified organic production is exported.

- In Algeria, the organic market is still relatively underdeveloped, but the number of products available is increasing to meet the demand of consumers looking for a healthy diet. Supermarkets and restaurants offer some organic products. These are imported pre-packaged products. There are also some organic shops which a local range (e.g. oils, dates, figs, etc.). Online organic sales are growing. Organic products are also sold in markets and on farms.
The main reasons to purchase organic products are health, respect of the environment, the absence of pesticides and better taste. The price and the low level of consumer knowledge about organic products appear to be the main obstacles to the development of the Algerian organic market.

- In Angola, the organic consumers are the wealthiest inhabitants, expatriates and those who have lived in Europe for a long time. The Angolan population is not aware of organic products.
Organic products are available in some premium supermarkets (such as Intermarket) and some drugstores. The country has only a few organic shops.

- In Benin, there are a few basket subscription systems.

- In Burkina Faso, the distribution of organic products evolves from year to year. It is mainly done through direct delivery from producers to customers, on the farm, on weekly markets[2], in a few organic shops (e.g.: Bio Farmer Market in Ouagadougou

1- Two-thirds of South Africans are urban dwellers.
2- An increasing number of fresh organic products are available in markets.

and Eco-Bio), a few supermarkets and restaurants (e.g.: Rosa dei Venti in Ouagadougou). The organic sector is poorly organized and structured, as a result, organic products are rare in supermarkets. Among the consumers of organic products, there are both expatriates and Burkinabes.
The organic products popularity is increasing due to the numerous food poisonings linked to pesticides or the use of chemicals in food preservation. People are therefore becoming aware of the need to consume organic products.
Organic products consumed in Burkina Faso mainly come from local certification. These include vegetables, grains, legumes and fruits.
The main obstacles to the development of organic are the lack of financial means for producers to produce in quantity and variety[1], the irregularity of production, the lack of knowledge of organic products (including in wealthy circles), the means of organic companies which are insufficient to promote their products and the lack of support for organic professionals.

- In Burundi, the market for organic products is not developed. Some organic products are sold in supermarkets.

- In Cameroon, organic consumption remains very marginal and concerns a population with a high-income level and a small part of the middle class. However, in most foreign supermarkets, there is a section[2] intended for organic products.

- In Ivory Coast, the organic market is still modest and reserved for the wealthy people or expatriates due to high prices. Organic products are sold in supermarkets. Local organic fruit and vegetable juices are sold in dedicated shops.
Ivorians still know little about organic products.

- The Egyptian organic market reached €18 million in 2021. Organic products are sold in supermarkets, in some organic shops, in drugstores and directly by farmers.
Many supermarkets now have an organic section. Large supermarket chains like Carrefour or Hyper One are expanding their organic ranges. Out of home catering uses a few organic products. Organic sales are mainly located in the urban areas of Cairo and Alexandria. In these cities, foreigners represent between 60 and 70% of organic consumers. A significant share of fresh organic fruits and vegetables are sold directly.
Most of organic foods produced in Egypt nevertheless remain exported.
The main reasons for purchasing organic products are quality, health and environmental protection. The main obstacles to market development are the high cost of organic products compared to conventional foods, the low-income levels of the Egyptian population[3], the lack of awareness of organic products, the lack of trust[4] as well as the low availability of some organic products.

- In Ethiopia, the organic market amounted to €13 million in 2018. However, organic products still seem little known to Ethiopians.
Since 2021, Ethiopian Airlines has been serving organic meals to its passengers.

1- Low production leads to high costs, which does not encourage consumers to buy organic products.
2- Variable size
3- Only 5% of the population is wealthy.
4- Until 2017, the use of the term organic was not at all protected in Egypt.

- The Kenyan organic market is also growing, even if it is still modest (€3.9 million in 2018). Organic consumption is mainly located in Nairobi. Organic products are available in supermarkets, in organic shops (one chain), in markets and in restaurants. It is increasingly common to find an organic section in the supermarket. Carrefour wishes to develop its organic range, especially for meats, fruits and vegetables. Organic producers' markets are developing. An online shop sells organic products.
The main reason to purchase organic products is food safety. The main obstacle to market growth remains price. It is mainly wealthy consumers who have travelled who consume organic products.

- In Liberia, organic products (not certified) are consumed locally. The country's first organic restaurant was opened in September 2022.

- In Madagascar, the organic market is embryonic. Mass distribution is the main channel for organic products. It mainly sells imported grocery products certified according to EU regulations. However, a small range of national organic products (fruit juices, jams, condiments, essential oils, honey, etc.) is starting to appear for direct sale, in supermarkets or in company stores. Organic vegetables are also sold in markets in the capital.

Organic consumers are often characterized by high purchasing power (Malagasy middle and upper classes and expatriates) and having a relative knowledge of what the term organic covers. However, urban consumers with lower purchasing power are concerned and eager to access healthy and natural foods. According to SYMABIO, market studies to characterize the development potential in the main urban centres of the country remain necessary to refine local production strategies, adapted certification and consumer information to allow access to organic products to as many people as possible.

- A few organic products have gained popularity in Mali in recent years: shea, sesame, fonio, mango and cashew. These products are available only in some supermarkets. Direct sales remain the most important distribution channel for organic products in Mali, In particular via basket subscription systems. There are also five markets with local organic products in the Malian capital, Bamako. Long considered a luxury habit, organic consumption is gradually becoming part of food habits in Mali.

Health is the main reason for purchasing organic products. The main obstacles to the development of the organic market are the small volumes available (due to high certification costs for organic producers, lack of production equipment and training support, difficulties of access water and land and unremunerative prices) and low consumer awareness of the benefits of organic products.

- Morocco has become the first organic market on the African continent. It was valued at €58.5 million in 2017. However, Moroccan organic production still remains mainly oriented towards export. The Moroccan organic market is nevertheless highly dependent on imports.
Moroccan consumers still often confuse organic products with fresh products. However, they are increasingly interested in organic products and can find them in more points of sale. Until recently, the organic range in major retailers was still very limited, but it has progressed a lot and small organic sections have appeared in some stores. In recent years, organic distribution has continued to develop. There are around twenty organic shops, including four belonging to the Moroccan Green Village network. Organic products are also sold in health food stores, drugstores, on the farm, via basket subscription systems or on the markets. Weekly organic markets are organized in Casablanca, Rabat, Mohammedia and Marrakech. Online organic sales are growing. Organic sales in bulk in stores is not permitted by Moroccan regulations. Consumers therefore often prefer to purchase organic baskets from the farm.
The supply of local organic fresh fruits and vegetables is growing.
The Moroccan organic market is mainly concentrated in large cities. Organic products are mainly purchased by young people and by pregnant women from the middle and upper classes.
Many hotels, riads and guest houses offer organic products to their guests.
The first reason for consuming organic products is health. The main obstacles to market development are price, insufficient availability and lack of knowledge on organic products.

- In Mozambique, residents know very little about organic products. Less than 2% of the population have ever seen them. However, organic products can be purchased directly from small farms. Organic production techniques are not very well known.

- In Namibia, the Dutch chain SPAR has opened an organic department in its Maerua store, with fresh products, processed products and cosmetics.

- In Niger, only a small part of the population is interested in organic products. These are mainly residents of the capital, Niamey. Nigeriens often confuse "organic" and "natural". In supermarkets, it is possible to find some imported processed organic products. There is no organic shop. It is possible to buy organic fruits and vegetables from some producers. Some hotels also obtain their supplies from the latter. Some organic processed products such as moringa herbal teas are sold in drugstores and online. The obstacles to organic market development are the low availability, the lack of knowledge on organic products, as well as the absence of technical reference for good control of organic production.

- In Nigeria, consumption of organic products remains modest due to the low purchasing power of a large share of the population. Only the middle and wealthy classes buy organic products and are interested in traceability. However, organic products are becoming increasingly popular, particularly thanks to advocacy carried out by various public and private institutions. The demand for organic products is increasing, as is the number of organic operators (importers, exporters and traders). A few organic restaurants have been created. It is also possible to find organic sections in some supermarkets.

Fruits, vegetables and dairy products seem to be the best-selling organic products in Nigeria.
Health is the main reason for purchasing organic products. Price remains the main obstacle to the development of the organic market.

- In Uganda, it is possible to buy organic products in markets, have them delivered to your home and buy them on the farm. There is also an organic shop managed by Nogamu.
The main organic products purchased in Uganda are cereals and pulses.
The main reasons for purchasing organic products are health, nutritional value and environmental protection. The main obstacle to market development is the lack of awareness about organic products.

- In Senegal, among the middle and upper classes, the popularity of organic products seems to be increasing. Senegalese people can buy organic products on the farm, on three conventional markets in Dakar, in supermarkets, convenience stores and a few organic shops. Organic products sold in supermarkets are essentially imported products.
Fresh fruits and vegetables, dairy products and fruit juices are the most consumed organic products in Senegal.
The main obstacles to the development of the organic market are the price because organic products sold in Senegal are often imported, the lack of support policy for the organic sector, the absence of value for producers and the low number of consumers.

- In Tanzania, organic products are sold in supermarkets, in some organic shops and at farmers' markets. They are also sold online (via WhatsApp) and appear on the menus of some hotels. The number of organic products available on the Tanzanian market is increasing, whether fresh or packaged products. It is possible to buy fruits, vegetables, tea, coffee, aromatic herbs, spices, oils and yogurts[1]. The organic products available come from both national production and imports.
The availability of organic products, which varies according to the seasons, seems to be the main obstacle to the development of the Tanzanian organic market.

- In Togo, it is possible to find unprocessed organic products on the farm, in some supermarket[2]s and in some markets. There are also some organic basket subscription systems. Organic products sold on the farm are generally not certified.
The main obstacles to organic market development are the lack of availability, the price and the lack of knowledge of Togolese people about organic products. The lack

1- Organic yogurts come only from imports and are the only organic dairy products available.
2- However, there are very few supermarkets in Togo.

of availability is due to several difficulties encountered by producers: difficult access to certification services for farmers, high certification costs and lack of production means.

- In Tunisia, although organic production is quite developed, the domestic market is still very little developed, with the bulk of production being intended for export. Consumers are insufficiently informed about organic farming. However, organic products can be bought in organic shops, online and more recently, in mass distribution. Around ten organic shops have been identified. They are located in the capital and in the largest cities. The supply of fresh products has grown in recent years but remains relatively limited and irregular. The supply of processed products also remains modest. The local organic range available on the market are very little diversified: mainly olive oil, cereal-based products, honey and aromatic plants.
Organic consumers of organic products are relatively well-off.
The main obstacles to organic market development are the lack of availability, prices and the lack of awareness among the general public of the benefits of organic products.

Organic Markets tomorrow?

- The future growth of the organic market will depend both on the evolution of the economic and geopolitical situation, the increase in areas, the structuring of organic sectors, the development of the introduction of organic products into distribution channels, and, of course, from consumers themselves. Public authorities have their role to play in increasing demand, in particular by promoting the use of organic products in collective catering and by communicating with consumers to make them more aware of the benefits of organic products.

- The development of some markets will be linked to the structuring of sectors and the creation of processing facilities. Many countries export raw organic products and import processed ones. Besides, some products are not available organically although they are locally produced conventionally.

- The growth of the organic market will also depend on the development of competing environmental labels which could continue to take market share from organic products.

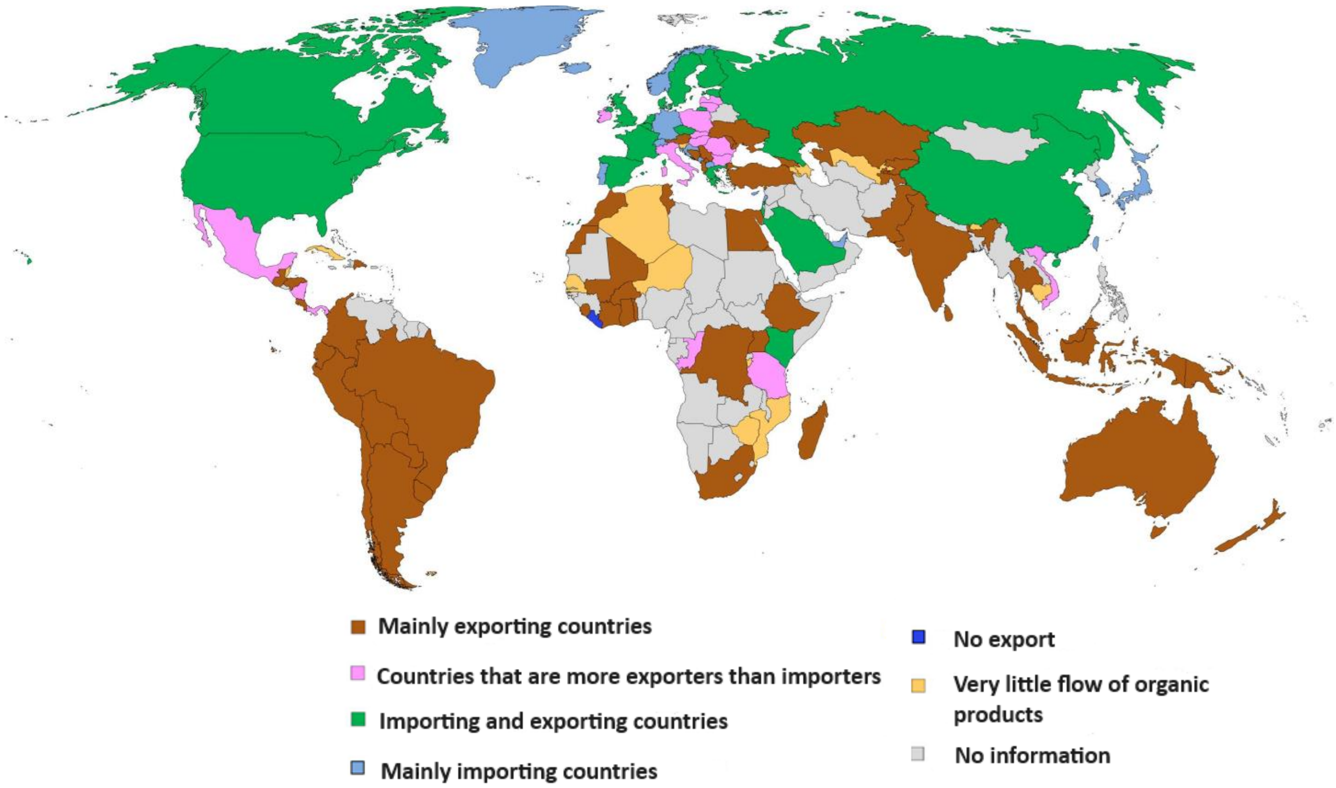
Global flows of Organic Products

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

Countries & Continents Profiles

- Among the ten main markets for organic products, seven are both importers and exporters: United States of America, France, China, Canada, United Kingdom of Great Britain, Sweden and Denmark, two are mainly importers: Germany and Switzerland and another exports more than it imports: Italy.

Countries profile regarding imports and exports of organic products



Source: Agence BIO

- In Europe, the country profiles are very various.

- In Asia, the situation is heterogeneous: some countries export a lot of organic products, while others import them.

- The Latin American countries are generally much more exporters of organic products than importers.

- In many African countries, organic products are almost exclusively intended for export.

- The Pacific Islands are generally exporters of organic products. They export a very significant share of their production.

Main importing countries of organic products

- The European Union, the USA, China, Canada, Switzerland and Japan are the main importers of organic products.

- In 2022, the EU imported 2.73 million tons of organic products from third countries (excluding Switzerland and Norway) [1]. This represents a drop of 5.1% compared to 2021. According to the European Commission, this drop may reflect a reduction in demand due to the sharp increase in food prices that year. Most of this decline can be attributed to reduced imports of fruits, vegetables, sugar, olive and palm oils, sunflower seeds and pet food. The increase in imports of soybeans, oilcakes, citrus fruits, rice and honey did not offset these declines.
In 2022, the main Member States importing organic products remained the Netherlands (over a third of volumes) and Germany (nearly 18%).
In 2022, Ecuador remained the main exporter of organic products to the EU in volume, with a share of 13%, ahead of the Dominican Republic (9%). Ukraine has become the third supplier of organic products to the EU (with a share of 8%).
Tropical fruits, nuts and spices remained the main category of imported organic products with 37% of the volume, i.e. 872,000 tons. Bananas represented 81% of this category (705,000 tons).
Oilcakes ranked second with 8% of imported organic volumes (223,000 tons).

- In 2022, US organic imports increased by 18.8% in volume compared to 2021, approaching 2.17 million tons.
The USDA tracks the flow of some organic products (mainly fruits and vegetables). In 2022, monitored organic imports amounted to €1.7 billion.
Latin America is the main supplier of organic products to the USA (71% of US organic imports by volume), with Ecuador, Mexico and Peru in the top places.
Among the organic products monitored, the most imported by the USA are coffee, blueberries and bananas.
Overall, the USA imported €1.7 billion worth of organic fruits and vegetables during the 2022/2023 campaign[2], almost a five-fold increase in ten years. The other most imported fruits and vegetables are avocados, tomatoes, mangoes, peppers, squash, strawberries and cucumbers.
The USA also imports a lot of soybeans, olive oil, cereals (especially rice, wheat and corn) and quinoa.

- China imports a lot of organic meats, oils, and dairy products (including baby milk powder). The USA and Europe are its main suppliers.

- In 2022, Canadian imports of organic products amounted to €648 million, an increase of 9% compared to 2021. Due to their location, the main entry points for organic products into Canadian territory are Ontario (45% of volumes in 2022) and British Columbia (29%).

1- Data from TRACES
2- September 2022 to August 2023

In 2022, coffee and bananas were the main organic products imported by Canada. Imported temperate organic fruits and vegetables mainly come from the USA.

- Switzerland is quite dependent on imports. The European Union is its leading supplier of organic products. In 2022, Switzerland imported nearly 271 thousand tons of organic products, an increase of 7% compared to 2021.

- The Japanese market is very dependent on imports because a small share of agricultural land is dedicated to organic farming. In 2018, its organic imports already amounted to 155 thousand tons. Japan imports a lot of soybeans and organic fruits. The USA and the EU are its main suppliers of organic products.

- Other countries are very dependent on organic imports, such as South Korea and Norway.

Main exporting countries for organic products by continent

- Organic export data is not homogeneous: it is available in value for some countries and in volume for others. When it is in volume, this most often concerns only exports to the European Union and the United States. A reliable classification of countries is therefore not possible. Data on the main exporting countries are therefore presented by continent.

North America

- The USA is a major exporter of organic products. However, total exports of organic products are not known, because only some product categories are tracked by the USDA. These are mainly some fresh fruits and vegetables. In 2022, monitored organic exports amounted to €635.9 million[1]. Even though fruits and vegetables are the main fresh organic products exported by the USA, total organic exports probably represent several billion €. Indeed, the USA exports a lot of processed products which are not tracked in the statistics.
The main organic fruits and vegetables exported are apples, grapes and lettuce.
The USA exports organic products to many countries. Its main destinations are neighbouring countries[2]: Canada and Mexico. The USA also exports a lot of organic products to Asia (Japan, Taiwan, South Korea and the United Arab Emirates) and Europe. In 2022, the USA exported 8.9 thousand tons of organic products to the European Union. The main organic products exported by the USA to the European Union are fruits, vegetables and coffee. Belgium and the Netherlands are its main destinations in the European Union.

- Canada exported €384 million worth of organic products in 2022, an increase of almost a third compared to 2021.
Canada mainly exports maple syrup, field crops, blueberries and processed fruit and vegetable products.
The USA is the main destination for Canadian organic products, ahead of Japan and the European Union.

1- Compared to around €309 million in 2011
2- Same in conventional

In 2022, Canada exported nearly 193 thousand tons of organic products to the USA. The main Canadian organic products exported to this country are organic field crops (mainly corn, oats and soybeans).
In 2022, Canada exported over 21 thousand tons of organic products to the European Union. The main organic products exported there are sugar, processed fruits and vegetables and soft wheat.

Latin America

- In 2022, Latin America globally exported nearly 2.8 million tons of organic products to the USA and the European Union, an increase of 3.6% compared to 2021.

- Banana is the first organic product exported by Latin America, far ahead of sugar.

- Latin America's main organic exporters are Ecuador, Mexico and Peru.

- In 2022, Ecuador was the main exporter to the European Union and the USA. Exports to these two areas globally represented over 593 thousand tons in 2022. Ecuador has 103 companies exporting organic products to the European Union. The Netherlands, Italy, Ireland and Germany are the main importing countries of Ecuadorian organic products from the European Union.
Ecuador mainly exports bananas (94% of its exports by volume to the EU and the USA), cocoa and coffee.

- The USA and Canada are important destinations for Mexican organic products. In 2022, Mexico exported nearly 478 thousand tons of organic products to the USA and nearly 58 thousand tons to the European Union. Its organic exports to these two areas have increased significantly compared to 2021 (+20%). Mexico exports a lot of bananas, vegetables and avocados.

- In Peru, organic exports amounted to €589 million in 2022. The main organic products exported were coffee, cocoa, bananas, quinoa and ginger.
In 2022, the European Union[1] was the main destination for Peruvian organic products (over 197 thousand tons), ahead of the USA (nearly 147 thousand tons).

- Argentina exports most of its organic production. The main destinations for Argentinian organic products are the USA, the European Union (especially Germany) and the United Kingdom. In 2022, Argentina exported 239 thousand tons of organic products to the USA and nearly 47 thousand tons to the European Union.
The main organic products exported by Argentina are pears, wheat, cane sugar, apples, soybeans, cider, wine, applesauce, rice and honey. Argentina is the largest exporter of organic apples and pears to the European Union. Argentinian organic honey is mainly exported to the European Union.

1- Mainly the Netherlands and Germany

- In 2022, Colombia exported 143 thousand tons of organic products to the USA and nearly 121 thousand tons to the European Union.
Coffee, bananas and sugar cane are the main organic products exported by Colombia.

- The Dominican Republic is a major exporter of organic products (€401 million in 2018). It mainly exports bananas and cocoa. The European Union is the main destination for Dominican organic products.
In 2022, the Dominican Republic exported over 251 thousand tons of organic products to the European Union.
In 2022, it also exported nearly 4 thousand tons of organic products to the USA.

- In 2022, Brazil exported nearly 107 thousand tons of organic products to the USA and nearly 66 thousand tons to the European Union.
Sugar is probably the main Brazilian organic product exported.

- Paraguay exported over 76 thousand tons of organic products to the USA in 2022 and over 31 thousand tons to the European Union. Germany and Sweden are the main destinations in the EU.
Paraguay mainly exports sugar and chia seeds.

- The European Union and the USA are the leading destinations for organic products from Honduras, ahead of Canada and Asia. In 2022, Honduras exported over 38 thousand tons of organic products to the European Union and nearly 20 thousand tons to the USA.
Honduras mainly exports fruits, vegetables, coffee, cocoa and aloe vera.

- Chilean organic exports amounted to over €270 million in 2021. These mainly consist of fresh and processed fruits and vegetables (primarily blueberries), olive oil, wine and honey. Chile exports around 95% of its organic production. The main destinations for Chilean organic products are the USA (nearly 34 thousand tons in 2022), the European Union (nearly 21 thousand tons), Canada and Asia.

- Costa Rican organic products are mainly exported to the European Union, the USA, Taiwan, Japan and Canada. In 2022, Costa Rica exported over 16 thousand tons of organic products to the European Union and nearly 13 thousand tons to the USA.
Costa Rica exports fruits[1] and vegetables, coffee, cocoa, sugar and vanilla.

- Bolivia exported over 11 thousand tons of organic products to the USA in 2022 and nearly 11 thousand tons to the European Union. It especially exports organic quinoa. France is one of the main buyers of Bolivian organic quinoa.

- Nicaragua exports most of its organic crops to the European Union and the USA. It mainly exports coffee, cocoa, fruits, sesame, chia seeds, peanuts and spices[2].

1- Mainly bananas, oranges and blackberries
2- Turmeric, ginger, cardamom and vanilla

Europe

- Europe exported nearly 291 thousand tons of organic products to the USA in 2022 (an increase of almost 69%).

European Union

- EU countries sell a significant share of organic products within this zone.

- Italian exports of organic products exceeded €3.64 billion in 2023 (+8% vs. 2022), i.e. 6% of Italian agricultural and food exports. Italian organic exports have almost tripled in ten years. Germany and France are the main destinations for Italian organic products. Italy exports a lot of fruit, vegetables and organic wine[1] (€670 million in 2023[2]). It also exports dairy products, olive oil, canned vegetables and bakery products.

- Spain exports over 40% of its organic production. In 2022, Spanish organic exports were valued at nearly €1.7 billion. 90% of Spanish organic exports go to other EU countries. Spain also exports organic products to the USA, Mexico, China, South Korea and Australia. It exports a lot of fruits, vegetables, olive oil and wine.

- In 2020, the Netherlands exported €1.3 billion worth of organic products. Fruits and vegetables are the main organic products exported. There are a lot of reshipments of organic products from other countries. The main destinations for Dutch organic exports are Germany and the Nordic countries.

- In 2022, French organic exports (including to EU countries) exceeded €1 billion. Wine has a significant share of exports (54% in value in 2022), ahead of grocery products. In 2022, 59% in value of French organic exports were destined for other EU countries. France also exports some dairy products, aquaculture products and organic fruits and vegetables, mainly to other EU countries.

- Danish organic exports amounted to €453 million in 2022. Denmark mainly exports to other EU countries, in particular Germany[3] (half of exports by value) and Sweden (13%). For several years, however, it has been developing its exports of organic products to Asia, in particular to China and the Middle East. The main organic products exported by Denmark are dairy products, pork, fruits and vegetables.

- Romania exports a large part of its organic production. Its main markets are Austria, the USA, Japan, Germany, France, Italy and Denmark. In 2022, Romanian organic exports were estimated at €200 million. In 2022, Romania exported over 36 thousand tons of organic products to the USA.

1- Germany is the main destination for Italian organic wines ahead of the Scandinavian countries and the Benelux.

2- 18% of Italian organic exports

3- Germany is also the leading origin of organic products imported into Denmark.

- The Czech Republic exported nearly €157 million worth of organic products in 2022.

- Austria mainly exports organic dairy products, especially to its neighbour Germany.

- Estonia exports field crops, processed fruits and flagrant, aromatic and medicinal plants. In 2022, it exported over 43 thousand tons of organic products to the USA.

- Bulgaria exports organic lavender and rose essential oils, mainly to other Member States[1] and the USA.

- Oats are the main organic product exported from Finland. It also exports other organic products such as berries. The main destinations for Finnish organic products are Denmark, Sweden, Germany and France.

Other European countries

- In 2022, European countries outside the European Union exported over 425 thousand tons of organic products (-17.5% vs. 2021).

- In Turkey, organic farming began with the impetus from Europe in the 1980s and production remains mainly dedicated to export. Its organic exports amounted to €640 million in 2023.
The European Union[2] (over 104 thousand tons in 2022) and Switzerland are the main destinations for Turkish organic products, ahead of the USA (nearly 61 thousand tons in 2022) and the Gulf countries.
Turkey mainly exports fruits (dried, fresh and nuts), legumes, cotton, flagrant, aromatic and medicinal plants and honey. It also exports organic processed products made with cereals or fruits and vegetables.

- Despite the war, Ukraine went on exporting organic products. In 2022, its organic exports were estimated at 280 thousand tons for a value of €237 million.
Ukraine exports around sixty products, including many organic cereals and oilseeds, fruits, mushrooms and flagrant, aromatic and medicinal plants.
Europe is its main market (including the Netherlands, Germany and Lithuania). In 2022, Ukraine exported over 219 thousand tons of organic products to the European Union (+16% vs. 2021) and nearly 7 thousand tons to Switzerland. In 2022, the most exported Ukrainian products to the EU were corn, soybeans, wheat, sunflowers (raw and processed), frozen berries[3], barley and rapeseed. Since the start of the war, organic products have been sent more to the EU by rail or road than by sea.
Ukraine also exported 54 thousand tons of organic products to the USA in 2022.

- In 2022, the United Kingdom exported nearly 53 thousand tons of organic products to the EU, its main customer. On the other hand, its organic exports to the USA remain very limited.

1- Mainly to France
2- Especially Germany and France
3- Mainly blueberries

The United Kingdom exports especially organic milk and salmon.

- In 2022, Russia exported over 45 thousand tons of organic products to the USA and over 9 thousand to the European Union.

- In 2022, Serbian organic exports were estimated at €70 million. Serbia mainly exports processed fruits.
The European Union is the leading destination for Serbian organic products, far ahead of the USA. In 2022, Serbia exported over 14 thousand tons of organic products to the European Union.

- Albania mainly exports organic products from wild harvests (especially aromatic herbs and wild fruits such as chestnuts), but also fruits and a little olive oil. The European Union[1] is the main destination for its organic exports, ahead of the USA[2] and Switzerland.
Albania has around thirty exporters of organic flagrant, aromatic and medicinal plants.

- Moldova exports organic field crops (mainly sunflower, corn and wheat), processed fruits (shelled nuts and dried plums), wines and flagrant, aromatic and medicinal plants (lavender, coriander and sage). The European Union and the USA are its main destinations.

- Most of Georgian organic exports go to Germany. The main organic products exported by Georgia are wine, hazelnuts, honey, herbal teas, flagrant, aromatic and medicinal plants and processed fruits and vegetables.

Asia

- In 2022, Asia globally exported over 614 thousand tons of organic products to the European Union and the USA (-8.9% compared to 2021). The European Union is its first market. Asia mainly exports soybean meals and rice.

- In 2022, China will become Asia's leading exporter of organic products, overtaking India.
Chinese organic exports amounted to €806 million in 2020. China mainly exports oil cakes, rice, processed vegetables, honey, green tea, aromatic, perfume and medicinal plants. The main destinations for Chinese organic products are Japan, the European Union (194 thousand tons in 2022) and the USA (5 thousand tons).

- In 2022/2023, India was the second largest exporter of organic products in Asia with 312 thousand tons for an amount of €640 million.
In 2022, it exported over 139 thousand tons of organic products to the European Union and over 36 thousand tons to the USA. It also exports to Canada, the United Kingdom, Oceania and South Asian countries.
The main exported products are oilseeds[3], rice, pulses, sugar, tea, nuts and spices.

1- Mainly Germany, France, Italy, Austria and Poland.
2- The USA mainly import organic sage from Albania.
3- Mainly soybean meals

- In 2022, Pakistan came in third place for organic exports to the European Union (nearly 51 thousand tons). On the other hand, it exports relatively few organic products to the USA (362 tons in 2022). It mainly exports rice.

- Sri Lanka exports most of its organic production. These are mainly tea[1], cane sugar, spices, flagrant, aromatic and medicinal plants, nuts, fresh and processed fruits and cereals. The main destinations for Sri Lankan organic products are the European Union (over 37 thousand tons in 2022), Japan and Australia.

- Kazakhstan's organic production is almost entirely exported. Its first market is the European Union. In 2022, it exported nearly 30 thousand tons of organic products to the European Union. It mainly exports soft wheat and organic oilseeds there.

- In 2021, Thai organic exports amounted to around €30 million.
In 2022, Thailand exported nearly 16 thousand tons of organic products to the European Union and over 7 thousand tons to the USA.
The USA, Hong Kong, Italy and Vietnam are the countries that buy the most Thai organic products.
Rice is the main organic product exported by Thailand.

- In 2022, Israel exported over 18 thousand tons to the European Union. It exports relatively few organic products to the USA (541 tons in 2022).

- In 2022, the Philippines exported nearly 18 thousand tons of organic products to the European Union.

- Vietnam exported around €314 million worth of organic products in 2022. It exports in especially organic shrimp, tea, rice and cashew nuts. The European Union (nearly 13 thousand tons in 2022) and the USA (714 tons) are the main destinations for Vietnamese organic products.

- In 2022, Indonesia exported over 9 thousand tons of organic products to the European Union and over 8 thousand to the USA.

Africa

- Africa exports many more organic products to the European Union than to the USA. In 2022, its organic exports to these two areas increased overall by 19.8%, exceeding 549 thousand tons.

- Soybean and soybean products are the main organic products exported from the African continent.

- In 2022, Togo exported over 160 thousand tons of organic products to the European Union and the USA, an increase of almost 55% compared to 2021. The European Union is the main destination with almost of 126 thousand tons in 2022. Togo is the world's leading exporter of organic soybeans. Soybeans represented 97% of

1- This has been the first organic product exported by Sri Lanka.

Togolese organic exports to the European Union and the USA in 2022. Togo also exports pineapples and cashew nuts.

- Tunisian organic exports amounted to €215 million in 2020. Most of Tunisian organic production is sold outside the country. Tunisia has become Africa's leading exporter of organic products. Olive oil is the main organic product exported (93% of volumes in 2022). Tunisia also exports fruits (mainly dates), vegetables and some flagrant, aromatic and medicinal plants.
In 2022, Tunisia exported over 46 thousand tons of organic products to the European Union (mainly to France, Italy and Spain) and nearly 13 thousand tons to the USA.

- In 2022, Egyptian organic exports to the European Union exceeded 41 thousand tons. Egypt exports very few organic products to the USA.
Egypt mainly exports potatoes and onions.

- Ivory Coast exported over 35 thousand tons of organic products to the European Union in 2022.

- South Africa exported nearly 35 thousand tons of organic products to the European Union in 2022. It exports a lot of organic citrus fruits.

- In 2022, Ghana exported over 20 thousand tons of organic products to the European Union and over 14 thousand tons to the USA.

- Export remains the main destination for Moroccan organic products. Its main markets are France[1], Spain, Italy, Germany, the Netherlands, Scandinavia and Lithuania. Moroccan exporters also ship their organic products to the USA, Canada and some Asian countries such as Japan and South Korea.
In 2022, Morocco exported over 20 thousand tons of organic products to the European Union.
Morocco mainly exports fruits and vegetables (fresh and processed), olive and argan oil and flagrant, aromatic and medicinal plants.

- In 2022, Uganda exported nearly 21 thousand tons of organic products to the European Union and a little over a thousand to the USA. Uganda mainly exports organic cocoa. According to NOGAMU, organic exports are expected to increase significantly in 2024.

- Burkina Faso exported over 20 thousand tons of organic products to the European Union in 2022. It exports many organic products: cotton, flagrant, aromatic and medicinal plants, oilseeds and fruits.

- Madagascar exports organic vanilla, fruits and shrimp.

1- Morocco began exporting organic products to the European Union in the mid-1980’s.

Oceania

- In 2022, Oceania exported nearly 34 thousand tons of organic products to the European Union and the USA (-1.9% vs. 2021).

- New Zealand exports over half of its organic production. In 2022, it exported nearly fifteen thousand tons of organic products to the USA and nearly another fifteen thousand to the European Union. China is another important destination for New Zealand organic products.
The main organic products exported are dairy products and fruits and vegetables (especially apples and kiwis). Dairy products are mainly destined for China, apples for the USA and kiwis for the European Union.

- In 2022, Papua New Guinea came in second place for organic exports to the European Union and the USA with nearly 2.5 thousand tons. It’s mostly coffee.

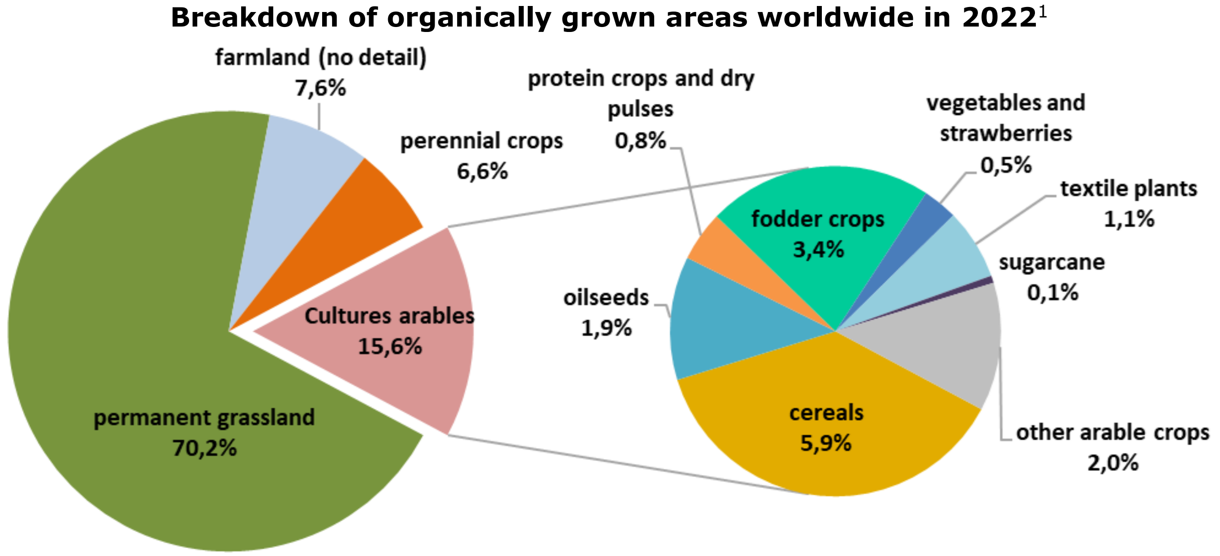
- In 2022, Australia exported around 20,000 tons of organic products to around thirty countries, including the USA and the European Union. In 2022, over 1,300 tons were exported to the European Union. Southeast Asia (including China, Singapore and Malaysia) is an important destination for Australian organic products.
Australia mainly exports organic beef, dairy products, wines and soybean products. Dairy products are mainly exported to Asia, mainly to China[1]. South Korea is the main destination for its organic soybean products. Norway is the leading consumer of Australian organic wines.

- The Pacific Islands export most of their organic production.

1- China buys a lot of organic baby food products from Australia.

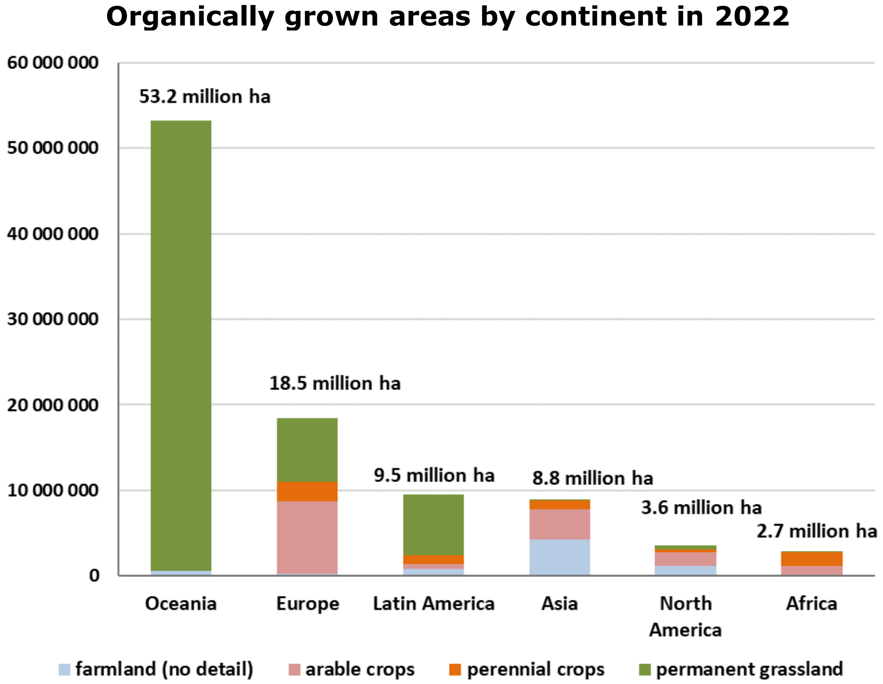
Focus on organic crops

Distribution of global organically grown areas: 70% with permanent grassland



Source: Agence BIO from FIBL/IFOAM's data

- Between 2021 and 2021, the areas dedicated to permanent meadows increased by over 25%, exceeding 67.6 million ha.



Source: Agence BIO from FIBL/IFOAM's data

1- Some countries with very large organic areas, such as Brazil and India, have limited or no information on the use of their land.

■ In Oceania, permanent grasslands represent most of the areas (99% in 2022). They also occupy an important share in Latin America (75%) and Europe (40%).

■ In Africa, perennial crops represent over half of the areas (59% in 2022).

■ A significant share of the areas is dedicated to arable crops in Europe (45% in 2022), North America (44%) and Asia (40%). In Asia, over half of it is cereals.

Focus on arable crops: 15,6 % of global organically grown areas.

■ In 2022, nearly 15.1 million hectares of arable crops were grown organically (- 0.7% vs. 2022), i.e. 1.1% of global areas dedicated to arable crops.
Organic arable crop areas have increased by 77% in ten years.
Textile crops are those with the biggest increase of areas over the decade (multiplication by eleven).

■ In 2022, 56% of organic arable crops were located in Europe and 23% in Asia.

■ Cereals[1] are the main organic arable crops (over 5.6 million ha in 2022), followed by fodder crops (over 3.3 million ha), oilseed crops (over 1.8 million ha), ahead of textile crops (over one million ha) and protein crops and pulses (over 0.7 million ha).

Cereals: main organic arable crops

■ The areas of cereals grown organically fell by 2.1% in 2022 compared to 2021, standing at over 5.6 million hectares, of which around 15% in conversion. Over the decade, the area of cereals grown organically has increased by 61%.
0.8% of global cereal areas were grown organically in 2022[2].
In 2022, 52% of the areas of cereals grown organically recorded were located in Europe, 32% in Asia and 13% in North America[3]. The main organic cereals producers were China (26% of global area), France (8%) and Germany (7%). The organic share still remained quite low in China in 2022 (1.5%), while it was 6.3% in France and 6.8% in Germany. In 2022, the countries with the largest shares were Austria (18.5%), Estonia (15.6%) and Sweden (12.3%).

■ Three cereals, soft wheat, durum wheat and spelt, represented nearly 41% of global organic cereal areas in 2022, ahead of rice and oats. France was the main producer of organic soft wheat.

■ Asia represented 93 % of the world areas for organic rice production in 2022. However, the organic share remained very modest (0.5% in 2022). China[4] and Thailand were the main organic rice producers in 2022. This cereal is also grown in many other Asian countries. It is one of the main organic products exported from

1- Quinoa and amaranth, which are not cereals but Chenopodiaceae, are still included in this category because they are grown for their seeds.

2- 2,2 % in Europe et 4,9 % in the European Union in 2022.

3- Soft wheat and corn are the main organic cereals grown in the USA.

4- Rice is one of China's main organic products.

Asia. In Europe, the production of organic rice is mainly located in Italy. Organic rice crops can be found on other continents. Brazil is the main producer in Latin America[1].

- In 2022, over 99,900 ha of Andean seeds were grown organically worldwide, almost all of which in Latin America. Bolivia was the leading producer with 89% of global area, ahead of Peru (10%). In 2022, 74% of Bolivian Andean seeds areas were grown organically, while the share was 15% in Peru. These are mainly quinoa and amaranth.

- In 2022, the EU imported 246 thousand tons of organic cereals, including 38% rice. Imports of organic cereals fell by 1.6% compared to 2021. Ukraine remained the main supplier of organic cereals to the European Union. Pakistan remained the main supplier of organic rice to the European Union, ahead of India.

- Switzerland imported 66,700 tons of organic cereals in 2020.

Oilseeds: 0.7 % of global oilseeds areas grown organically

- Over 1.8 million ha of organically grown oilseeds were recorded in 2022 (-15.2% vs. 2021), including around 10% in conversion. These areas are underestimated due to the absence of statistics for Brazil, a major conventional oilseed producer.
The areas of oilseeds grown organically have more than doubled in ten years.
In 2022, 38% of the organically grown oilseed areas identified were located in Europe, 34% in Asia, 15% in Africa and 11% in North America. The main organic oilseed producing countries were China (508,000 ha), Ukraine, Togo, France, and the USA.
In China, 2.3% of oilseed areas were grown organically in 2022. Togo was the country with the largest share of oilseed areas grown organically in 2022: 69%. In Europe, 1.8% of oilseed areas were grown organically in 2022[2], with 7.6% in France.

- Soybean was the main oilseed species grown organically in 2022[3] with nearly 1.07 million ha, i.e. 59% of the global organic oilseed areas. Organic soybean areas fell by 9.7% in 2022 compared to 2021. Only 0.8% of global soybean areas were grown organically in 2022. China was the leading producer with 35% of global soybean areas in 2022, ahead of Togo (12%). The share of national areas grown organically still remained modest in China in 2022: 4.5%.
The market for organic soybean products is growing rapidly. Europe is the main market for these products.

- Sunflower was the second most organically grown species in 2022, with 17% of global organic oilseed areas, i.e. over 306,000 ha (-27% vs. 2021). This represented only 1.0% of global sunflower areas. In 2022, France and Romania were the main organic sunflower growers. In 2022, the share of sunflower areas grown organically amounted to 8.0% in France and 5.2% in Romania.

1- Argentina also grows organic rice.
2- 4.4% in the European Union
3- It is the main conventional oilseed crop worldwide.

- The areas of sesame grown organically are not known for 2022.

- In 2022, the EU imported 223 thousand tons of organic oilseed meals (+7% vs 2021), nearly 192 thousand tons of organic soybean (+51%) and nearly 93 thousand tons of other organic oilseeds (- 36%). 54% of the meals came from China and 31% from India. 63% of organic soybeans came from Togo and 16% from Ukraine. 22% of other oilseeds came from Ukraine and 11% from China.

- The USA imported over 343 thousand tons of organic oilseeds in 2022, mainly from Ukraine and Turkey.

Organic protein crops and pulses: mainly grown in Asia and Europe

- Over 0.7 million ha of organically grown protein crops and pulses were recorded in 2022 (-7.6% vs. 2021, but more than a doubling vs. 2012), including around 11% in conversion. Global areas are underestimated due to the absence of statistics concerning organic areas for three major conventional protein crop producers: India, Niger and Myanmar.

- In 2022, 73% of the areas of protein crops and pulses grown organically identified were located in Europe and 21% in North America.

- 0.8% of the world's protein crops and pulses were grown organically in 2022[1]. The countries with the largest organic shares in 2022 were Denmark (69%) and Austria (63%).

Organic cotton: a crop that started to be grown in the early 90's.

Production

- Cotton began to be certified organic in 1992. In 2021, over 802 thousand ha of cotton were grown organically, including 23% in conversion[2]. Less than 2% of cotton was grown organically globally.
During the 2020/2021 campaign, over 342 thousand tons of cotton fibers were certified organic.

- In 2020/2021, although twenty-one countries grew organic cotton, 97% of organic cotton was produced by only eight countries: India (38%), Turkey (24%), China (10%). %), Kyrgyzstan (9%), Tanzania (6%), Kazakhstan. (4%), Tajikistan (4%) and the USA (2%).
During this campaign, the countries with the strongest production growth were Turkey, Tanzania and China.
The other organic cotton growing countries were Argentina, Benin, Brazil, Burkina Faso, Egypt, Spain, Ethiopia, Greece, Mali, Uganda, Uzbekistan, Pakistan and Peru.

- The organic share in national cotton production was still low in 2020/2021 in a large number of countries. This was particularly the case in India (2.1%) and China

1- 9.2% in Europe and 24.5% in the European Union
2- The latest Textile Exchange report is from 2022.

(0.6%). In Turkey and Tanzania, on the other hand, organic already represented a significant share of cotton areas (12.3% and 15.7% respectively).

- Organic cotton production is sometimes very concentrated in one part of the country. For example, in the USA, approximately 96% of organic cotton is grown in Texas. In China, 99% of organic cotton is produced in Xinjiang.

- In 2020/2021, projects in Thailand, Myanmar and Senegal were unfortunately unable to produce any organic cotton due to flooding, political instability and certification issues.
Organic cotton growing projects are underway in several countries such as Cameroon, Ivory Coast, Zambia and Mozambique.

- According to Textile Exchange, farmers' access to non-GMO cotton seeds remains a huge obstacle for organic farmers, especially in countries like China and India where GMO cotton dominates the market cotton landscape.

- An increasing number of Turkish companies are producing large volumes of organic cotton in Kyrgyzstan and Tajikistan, almost all of which is brought to Turkey for processing after ginning.

Market

- Organic cotton began to be marketed in the late 1980s. Currently, an increasing number of clothing brands are using organic cotton. Demand for organic cotton therefore still exceed supply. The global cotton market was estimated at €14.5 billion in 2015 (almost stable vs. 2014). 81% of companies using organic cotton are in the clothing sector.
The manufacturing of clothes made with organic cotton is growing in Peru.
The US market for organic fiber products already represented nearly €1.6 billion in 2018.
In the United Kingdom, demand still exceeded supply of organic cotton in 2023.
A significant share of fair-trade cotton products is also certified organic.

Organic sugar: production mainly from sugar cane

Sugar cane

- 107,926 ha of sugar cane were grown organically in 2022, i.e. 0.4% of the world's sugar cane areas. Areas fell by 6.5% compared to 2021 but increased by 56% compared to 2012.
Global production of organic cane sugar was estimated at 4.9 million tons for 2016, i.e. 0.3% of global production.

- Around 90% of organic cane sugar production is sold as organic.

- In 2022, 85% of organic sugar cane areas were located in Latin America. However, the organic share in Latin America was still only 0.7% in 2022. Paraguay (nearly 42,100 ha) and Argentina (nearly 15,400 ha) are the main organic sugar

producers worldwide[1]. In Argentina, organic sugar cane is mainly grown in the provinces of Jujuy and Salta, in the northwest of the country.
In Paraguay, 40% of sugar cane areas were grown organically in 2022. In Argentina, the share was ten times lower.
Sugar is the main organic product exported by Paraguay (62,910 tons in 2019), Brazil and Colombia.
The production of organic cane sugar is developing in other countries, such as Costa Rica which was already exporting organic sugar to 17 countries in 2020.

■ 8% of organic sugar cane areas were located in Africa in 2022. The share of African sugar cane areas grown organically was still only 0.5% in 2022. Mozambique cultivated nearly 8,400 ha of organic sugar cane in 2022, i.e. 17% of its area of this crop. There are two organic sugar production factories in Mozambique.

■ Asia represented 7% of organic sugarcane areas in 2022. The share of organic in sugarcane cultivation remained extremely modest with 0.07% in 2022.
Thailand came first on the continent with 4,744 ha grown organically in 2022, i.e. 0.3% of its area under this crop.
In 2022, Indian areas amounted to 1,600 ha (0.03% of national sugarcane areas). During the 2021/2022 campaign, India produced nearly 337 thousand tons of organic cane sugar.

Sugar beets

■ In 2022, 33,557 ha of organically grown sugar beets were recorded in the world, i.e. 0.8% of global sugar beet areas. Global organic areas are probably underestimated because Chinese areas are not known for 2022.
In 2022, 49% of the areas identified were located in Europe and 44% in Asia. India and Germany were the main organic sugar beet growers in 2022 with, respectively, 14,600 ha and 8,500 ha. However, the organic share of sugar beet areas was still low in Germany in 2022: 2.2%.
In 2022, nearly 16,000 ha of sugar beets were grown organically in the European Union, i.e. 1% of its total sugar beet areas. In 2022, Switzerland had exceeded its goal of 200 ha of sugar beets grown organically, set for 2023.

Maple sirup

■ Quebec is the world's leading producer of organic maple syrup. 37% of its maple farms were certified organic in 2021.

Market

■ The global organic sugar market was estimated at €575 million in 2020. North America is the leading market for this product, ahead of Europe, Asia and Brazil. In 2016, the USA imported €45.5 million worth of organic sugar.

1- In conventional, Brazil is the leading producer.

In 2022, the EU imported nearly 146 thousand tons of organic cane and beet sugar (-11% vs. 2021) and over 45 thousand tons of other sugar (-3%). Colombia was the EU's leading supplier of organic sugar[1] (36% of imports), ahead of Brazil (24%), Paraguay (10%) and Argentina (8%).
Argentinian organic cane sugar is mainly exported to the European Union and the USA.
In 2019, Switzerland imported 60,200 tons of organic sugar beets and nearly 4,700 tons of organic sugar from cane.

Organic vegetables, potatoes and strawberries

Vegetables

■ Nearly 503,500 ha of vegetables (excluding strawberries) grown organically were recorded in 2022 (+8.8% vs. 2021), i.e. 0.8% of global vegetable areas2. However, the areas are underestimated because there is no data available for India, a major conventional producer.

Over the decade, the area of fresh vegetables grown organically increased by 72%.
In 2022, 43% of organically grown vegetable areas were located in Europe, 23% in North America and 16% in Asia.
In 2022, fruit-vegetables represented 12% of vegetable areas grown organically, compared to 20% a few years ago.
In 2022, the main producers were the USA (19%), China (14%) and Italy (12%).
14.3% of Italian vegetable areas and 14.1% of US areas were grown organically in 2022, while the share was only 0.3% in China.
Luxembourg and Denmark stood out with, respectively, 41.4% and 40.9% of their vegetable areas grown organically in 2022.

Potatoes

■ In 2022, over 57,100 ha of potatoes were grown organically worldwide, i.e. only 0.8% of the areas dedicated to potatoes.
Europe represented 68% of organic areas in 2022 and Africa 24%.
In 2022, Egypt was the main organic potato growing country, ahead of Germany. In Egypt, the organic share was 5.3% in 2022. In Germany, it was 4.7%.

Strawberries

■ 7,919 ha of strawberries were grown organically worldwide in 2022, i.e. 2.1% of global strawberry areas. This area is underestimated, because the figure for the USA, one of the main producers of organic strawberries, is not known for 2022.

1- This concerns organic sugar from cane and beet.
2- 4.8% in Europe and 9.9% in the European Union

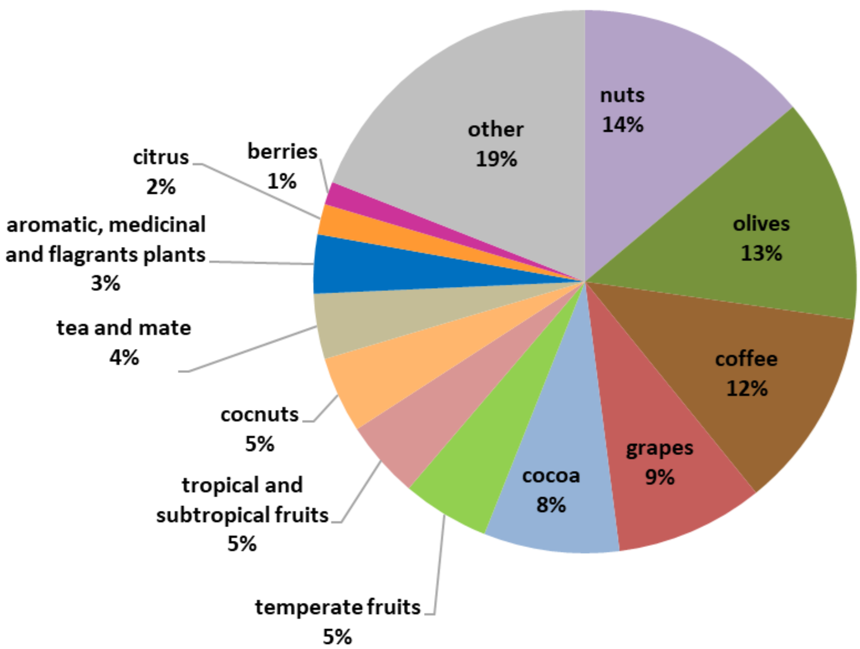
Focus on perennial crops: 6.6 % of global areas grown organically.

- Perennial crops certified organic and in conversion covered nearly 6.4 million hectares in 2022 (+0.8% vs. 2021). 3.6% of global perennial crop areas were grown organically in 2022.
Areas grown organically have almost doubled in a decade.

- They were mainly located in Europe (37% in 2022) and Africa (25%). They represented 6.6% of organic land in 2022. In Europe, their share was 13.6% and in Asia, 12%.

- In 2022, the cultivation of nuts represented 14% of organic areas of perennial crops and those of olives 13%.

Nearly 6.4 million ha of organic perennial crops worldwide in 2022



Source : Agence BIO d'après FIBL/IFOAM

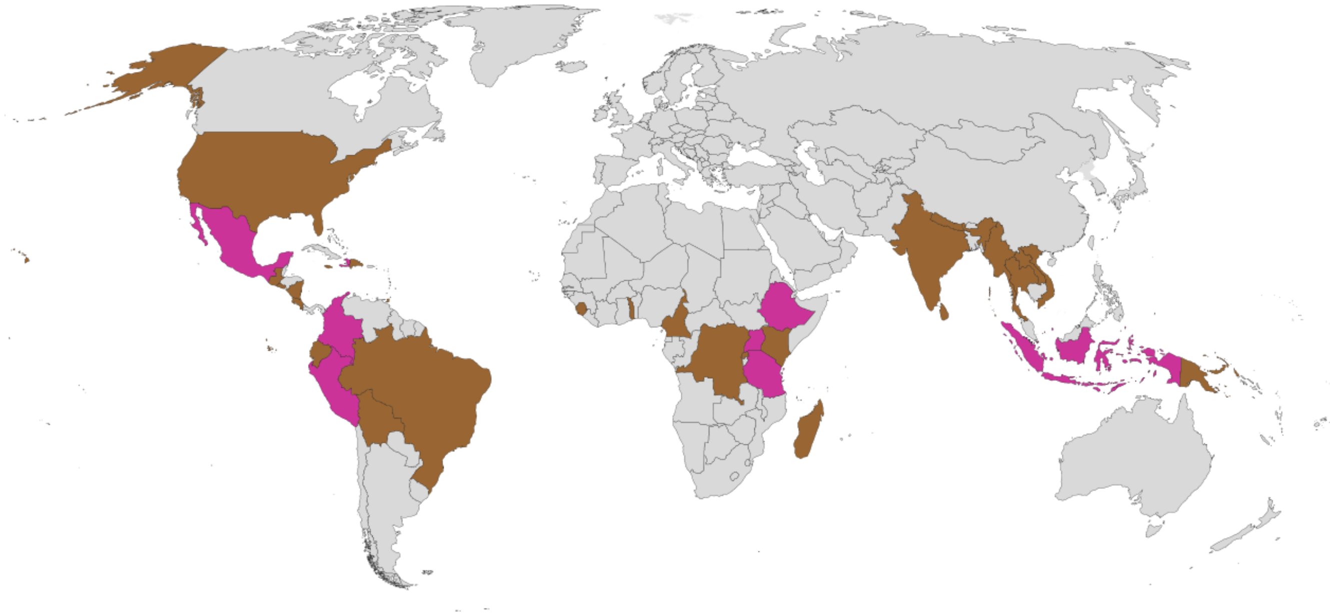
Organic coffee: Over half in Latin America

Production

- The certification of organic coffee began in the late 1960s.
Over 761,400 ha of organically grown coffee trees were recorded in 2022 (-17.7% vs. 2021), including around 6% in conversion. 6.7% of the global coffee area was grown organically in 2021.
Over the decade, the area of organically grown coffee trees increased by 8%.

- 55% of organic coffee trees areas identified were in Latin America in 2021, 35% in Africa and 9% in Asia.

Countries growing coffee organically in 2022



Source : Agence BIO d'après FIBL/IFOAM

- In 2022, the main organic coffee producing countries were Ethiopia[1] (23% of global areas), Peru (21%), Mexico (13%), Colombia (10%), Honduras (6%) and Tanzania (4%).

- In Ethiopia, nearly 174,600 ha of coffee fields were grown organically in 2022, i.e. a quarter of the national areas intended for coffee. The Ethiopian government strongly encourages the sector to adopt more sustainable cultivation techniques such as organic farming and focus on the production of high-quality Arabica. Coffee is Ethiopian main export crop.

- In Peru, nearly 156,300 ha were intended for organic coffee cultivation in 2022[2], i.e. 34.4% of the national coffee area. It was Arabica. The main organic coffee production regions are Amazonas, Ayacucho, Cajamarca, Cusco, Huánuco, Junín, Pasco, Piura, Puno and San Martín. Organic coffee production is actively encouraged by local government agencies and NGOs, mainly to increase farmers' income. Export promotion is carried out by the Peruvian agency PromPeru. Organic coffee production reached 120,000 tons in 2021, almost doubling over the decade.
Peru is one of the world's leading exporters of organic coffee. In 2020, Peru exported nearly 67,100 tons of organic coffee, for over €175 million. Peruvian organic coffee is exported to many countries, led by the USA, Germany, Canada, Belgium and Sweden.

1- Ranking of conventional coffee producing countries in 2023: 1) Brazil, 2) Vietnam, 3) Colombia
2- Peru is the world's leading producer of fair-trade coffee.

- In Mexico, nearly 102,400 ha were dedicated to organic coffee cultivation in 2022, i.e. 16% of national coffee areas. Chiapas is the main region for organic coffee production.
Most of the coffee exported is Arabica. The coffee orange rust epidemic has seriously affected national coffee production, mainly organic. In order to remedy this, the government has promoted several state initiatives to support the renewal of production such as the introduction of pest-resistant varieties, training, as well as value-added initiatives such as the production of certified coffees, among which organic coffees.

- In Colombia, 74,600 ha of coffee were grown organically in 2022, i.e. 8.9% of national coffee areas.

- Brazil, which is a major producer of conventional coffee, still only cultivated a small part of its area organically in 2021 (0.3%). However, there are initiatives to stimulate the production of organic coffee in Brazil, such as that of the Brazilian Organic Coffee Association or that of the government of the State of Minas Gerais which offers technical assistance to facilitate organic conversion.

Market

- In 2021, Latin America exported 187,355 tons of organic coffee, almost all of which to the European Union and the USA, while Asia exported 13,225 tons there.

- The global organic coffee market has been estimated at €9.0 billion in 2022 and could approach €14 billion by 2027. Arabica represents approximately three-fifths of the global organic coffee market.
In general, organic coffee is imported through channels similar to those of conventional coffee.

- The main markets for organic coffee are the USA, Europe[1] and Japan. A significant share of fair-trade certified coffee is also organic. This double certification is increasingly appreciated on the coffee market.

- Coffee is the main organic product imported into the USA. Most of it is unroasted coffee. The main country of origin is Peru. In 2022, the USA imported 103 thousand tons of organic coffee. They re-export part of it. In 2022, organic coffee sales in the USA amounted to nearly €2.2 billion.

- On the European market, organic coffees are found in all price segments and are mainly sold in supermarkets. European supermarkets are increasingly developing organic coffees under private labels.
In 2022, the European Union imported over 133 thousand tons of organic coffee.
Germany is the leading market for organic coffee in the European Union and one of the main importers of organic coffee globally[2]. A significant share of the organic coffee imported by Germany is reshipped to other EU countries. Around 26% of German

1- Europe is the world's largest market for coffee.

2- Hamburg is the world's leading coffee transit port. Germany is the largest European market for conventional coffee.

consumers say they prefer organic coffee over conventional coffee and 78% are willing to spend more on organic coffee than on conventional coffee.
France and Italy are the two other biggest EU markets for organic coffee. Honduras is Italy's leading supplier of organic coffee. In Sweden, organic represented 10.7% in value of the coffee market in 2021. The large Swedish roaster Löfbergs is one of the world's largest importers of organic and fair-trade coffee.
The United Kingdom is an important market for organic coffee. A significant share of the coffee sold in this country is certified organic.

- In Japan, consumers' interest in organic coffee is growing.

- Organic coffee sales have grown significantly in Australia over the past decade, as Australian consumers increasingly demand high-quality, ethically and sustainably produced coffee beans.

- Organic coffee began appearing on store shelves in Eastern Europe, Pacific countries, Latin America, the Middle East and South Africa.

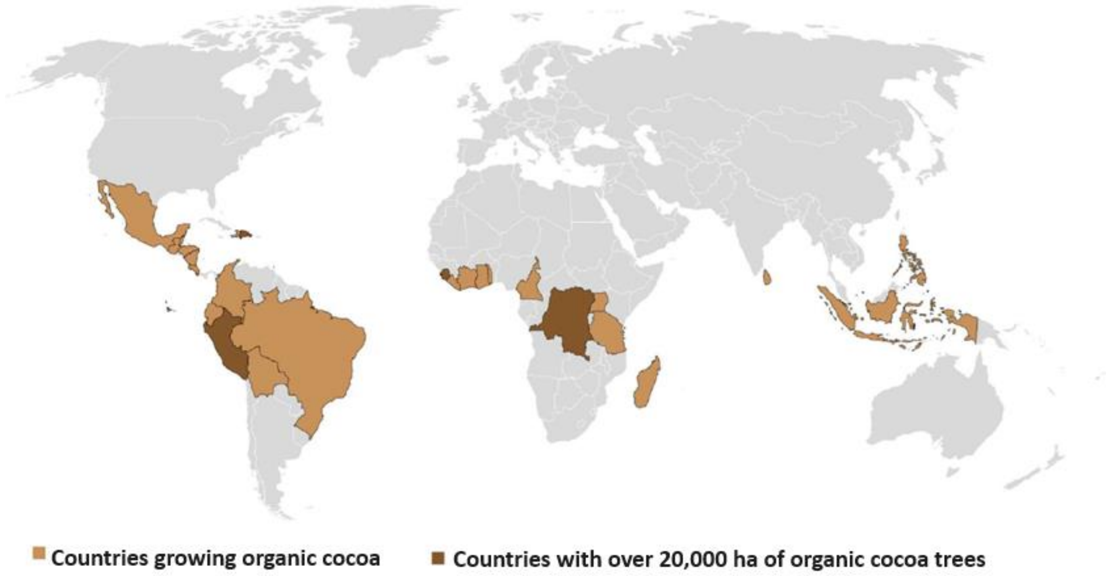
Organic cocoa: 4.4 % of global cocoa areas

Production

- The recorded areas of cocoa trees grown organically amounted to over 515,200 ha in 2022 (+9.8% vs. 2021), including around 7% in conversion.
Over the decade, the areas have increased by 132%.

- 61% of the world's organic cocoa tree areas were located in Africa in 2022 and 39% in Latin America.
In 2022, the organic share was higher in Latin America (10.8%) than in Africa (4.0%).

Countries growing cocoa organically in 2022



Source : Agence BIO d'après FIBL/IFOAM

- In 2022, Sierra Leone remained the leading organic cocoa grower with 32% of the world's area, ahead of the Dominican Republic[1] (22%), the Democratic Republic of Congo (18%) and Peru (10%). The share of cocoa tree areas grown organically is not known for Sierra Leone nor the Democratic Republic of Congo. It stood at 87.5% in the Dominican Republic in 2022 and approached 29% in Peru.
Since 2017, the Dutch company Tradin Organic has played an essential role in the development of organic cocoa farming in Sierra Leone.

- Ivory Coast, the world's leading producer of conventional cocoa, only started growing organic cocoa very recently: 0.1% of its cocoa tree areas were grown organically in 2021[2]. However, there are several organic cocoa cooperatives, including one that is also fair trade certified. Ivorian production of organic cocoa is done through agroforestry.

- In 2022, Belize and Tanzania stood out for the significant share of organic in their cocoa crops with, respectively, 82.4% and 77.7%.

- Global production of organic cocoa has exceeded 130,000 tons for several years, i.e. over 3% of global cocoa production.

Market

- Latin America exported over 43,500 tons of organic cocoa to the EU and the USA in 2021.
In the Dominican Republic and Peru, a significant share of organic cocoa is also fair trade certified.
Cocoa produced in Latin America is generally processed in Europe, mainly in Switzerland. Nevertheless, Nicaragua and Costa Rica have developed organic chocolate production for local markets. Consumption of organic chocolate is also growing in Mexico and Bolivia.

- The largest organic cocoa traders and processors are located in North America and Europe[3].

- In 2022, the EU imported nearly 73,000 tons of organic cocoa beans (-5.5% vs. 2021), i.e. 2.7% of its total imports of cocoa beans, and over 1.6 thousand tons of organic cocoa paste and powder (-38% vs 2021), i.e. only 0.1% of its total exports of these products. In 2022, the Dominican Republic remained the main supplier of organic cocoa beans to the European Union, ahead of Sierra Leone. The largest importers of organic cocoa beans from the European Union are the Netherlands (over 52,000 tons in 2020), Italy (nearly 9,000 tons) and France (over 7,000 tons) [4]. The Netherlands is also the EU largest importer of conventional cocoa, as it is home to the world's second-largest cocoa grinding and processing industry after Ivory Coast.

1- 22nd world producer of conventional cocoa
2- On the other hand, it has large areas of cocoa intended for fair trade.
3- The same for all cocoa
4- 7.7% of Dutch imports of cocoa beans, 8.7% for Italy and 4.6% for France.

- In 2019, Switzerland imported 6,429 tons of organic cocoa. In 2022, the country's first 100% organic cocoa processing plant was established in Beringen to produce organic and fair trade certified semi-finished cocoa products (paste, butter and powder). The double certification (organic and fair trade) of chocolate is especially appreciated by Swiss consumers.

- The first organic chocolate was marketed in 1989. The global organic chocolate market has been estimated at over €600 million in 2022 and could exceed €900 million by 2028. A significant share of organic chocolate is also fair trade certified.
Europe is the leading market for organic chocolate ahead of North America. The main European markets are France, Germany, Italy and the United Kingdom. Organic represented 7.0% in value of the French chocolate market in 2020, compared to 2.5% in Germany in 2021 and 3.3% in Switzerland in 2022. In Europe, organic chocolate is available in a wide price range. Mass distribution is the leading channel for organic chocolate in Europe. It has significantly developed its range of organic chocolate in Europe in recent years. The main European retailers all offer private label organic chocolate.
Consumption of organic chocolate seems to be growing rapidly in Asia.

Organic tea: a crop that started in the late 70's.

Production

- Organic tea is produced in Asia and Africa.

- 217,750 ha of tea grown organically were recorded in Asia in 2022, i.e. 4.7% of Asian tea areas.
With 199,000 ha in 2022, China was the world's leading producer of organic tea[1]. Despite a strong increase in areas in recent years, organic still represented only 5.9% of Chinese tea areas in 2022. China produces much more organic green tea than black. Yunnan is by far the largest region for organic tea production. The provinces of Fujian, Hubei and Zhejiang also produce a lot of organic tea. They probably export a larger share of their organic tea than Yunnan. The USA, Germany and France remained the three main destinations for Chinese organic teas. Local consumers are not particularly interested in organic tea.
In 2022, nearly 8,200 ha of organically grown tea were recorded in Myanmar, i.e. 8.5% of national tea areas.
In 2022, 11,000 ha of tea were grown organically in the Vietnamese province of Phu Tho, the main production region.
3,000 ha of tea were grown organically in India in 2022. During the 2021/2022 campaign, India produced 42,845 tons of organic tea (+1.7% vs. previous campaign). This is black tea. The main region for organic tea production is Darjeeling, in West Bengal. Around 70% of production in this region is certified organic. Organic tea is also produced in other regions including Assam in Sikkim. A significant share of Indian organic tea is exported. Its main destinations are the European Union (including Germany, France, Italy, the Netherlands and Belgium), the United Arab Emirates, Iran, Japan and Sri Lanka. Organic tea is still a niche market in this country, although it is gaining popularity among Indian consumers.

1- Also the first producer of conventional tea.

1,450 ha of tea were grown organically in Japan in 2022, i.e. only 3.8% of the country's tea area. It is mainly green tea. Kagoshima Prefecture[1] is the main organic tea production region, ahead of Shizuoka Prefecture, Miyazaki Prefecture and the Uji region. The volume of organic production for 2020 is estimated at 8,000 tons (i.e. approximately 10% of Japanese tea production). Japan exports an increasing quantity of organic green tea. The Japanese government is encouraging farmers to increase organic tea production in order to grow exports. Japan's main customers are the European Union (in particular, Germany, France and the Czech Republic) and the USA. Organic represents a significant and growing share of Japanese tea exports to the European Union. Organic tea exports are growing faster than national consumption. The taste of organic tea is not necessarily appreciated by the Japanese. However, Japanese consumers concerned about their health and the environment are interested in organic tea.
955 ha of tea were grown organically in Nepal in 2022, i.e. 6.0% of national tea areas. Organic tea cultivation began in 1995 and is intended for export.
In Indonesia, tea areas grown organically exceeded 800 ha in 2022, which still represented only 0.7% of the country's total tea areas.
In Laos, tea areas grown organically amounted to over 700 ha in 2022, i.e. 13.9% of national areas.

- Rwanda was the leading African grower of organic tea in 2022, with nearly 3,900 ha, i.e. 14.7% of national tea areas. Mozambique came in second place with almost 2,600 ha, i.e. 7% of its tea areas.
Uganda and Rwanda have launched tea production with dual organic and fair-trade certification.

- In Europe, organic tea production is growing in Georgia, with 148 ha grown organically in 2022 (i.e. 5.6% of national tea areas) and in Portugal (on São Miguel Island, in the Azores).

Market

- The global organic tea market reached €1.05 billion in 2022. It is expected to reach €1.7 billion by 2027 and exceed €2 billion by 2030. US organic tea sales amounted to €234 million in 2019. The USA especially imports organic green tea from China, India, Sri Lanka and Japan.
France and Germany are the main EU markets for organic tea. A significant share of organic tea sold in Germany is also fair trade. Germany processes some of the tea leaves it imports to sell them to other European countries.
In 2021, the British organic tea market was estimated at €138 million.

1- Especially around the town of Kirishima

Organic spices: a production in development

■ Many spices are produced organically, including vanilla, cinnamon, ginger, pepper and even turmeric.

■ The production of organic spices exists in several African countries. In 2021, Africa exported 1,230 tons of organic spices and aromatic plants to the European Union and the USA.
Kenya produces different organic spices. Madagascar seems to be the main producer of organic vanilla.

■ In 2021, Asia exported 2,455 tons of organic spices and aromatic plants to the European Union and the USA.
India is a major producer of organic spices. Other Asian countries also produce organic spices, such as Bangladesh.

■ In 2021, Latin America exported 200 tons of organic spices and aromatic plants to the European Union and the USA.
Peru is the world's leading producer of organic ginger.

■ In Oceania, the main organic spices produced are vanilla, turmeric and ginger. The main producers of organic spices are Fiji, Vanuatu, Niue and Samoa. In 2021, Oceania exported 44 tons of organic spices and aromatic plants to the EU and the USA.

■ Germany is the main European market for organic spices[1], especially for ginger. The United Kingdom is also an important market for organic spices. A significant share of organic spices imported into the European Union transits through the Netherlands.
Organic still represents less than 5% of the European turmeric market.

Organic coconuts: 2.6 % of global areas

■ Coconuts were grown organically on 289,420 ha in 2022 (-6.5% vs. 2021). In a decade, the areas grown organically have increased almost fivefold.
96% of the areas were located in Asia.

■ The Philippines was the world's leading producer of organic coconuts in 2022 with over 181,100 ha, i.e. 63% of the world's area. In Asia, the second largest producer of organic coconuts was Sri Lanka. The share of organically grown coconut palm areas still remained modest in Asia: 2.6% in 2022.

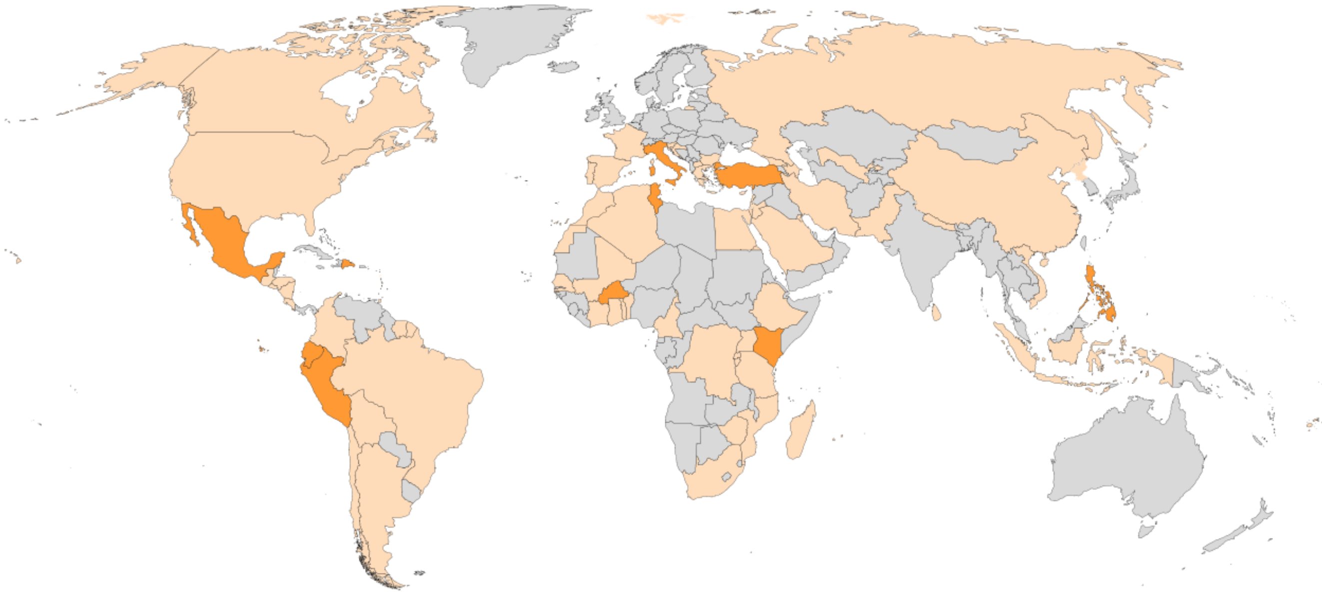
1- Also the leading European market for conventional spices.

Organic tropical and subtropical fruits: mainly in Latin America

All organic tropical and subtropical fruits

■ Over 295,100 ha of organically grown tropical and subtropical fruits[1] were recorded in 2022 (-10.8% vs. 2021), i.e. 1.0% of global tropical and subtropical fruit areas[2]. 8% of the orchards grown organically were in conversion in 2022. The areas are underestimated because the organic areas are not known for India and Tanzania, two of the main producing countries of this kind of fruit.
In a decade, the area of tropical and subtropical fruits grown organically has increased by 38%.

Countries growing tropical and subtropical fruits organically in 2022



Source: Agence BIO from FIBL/IFOAM's data

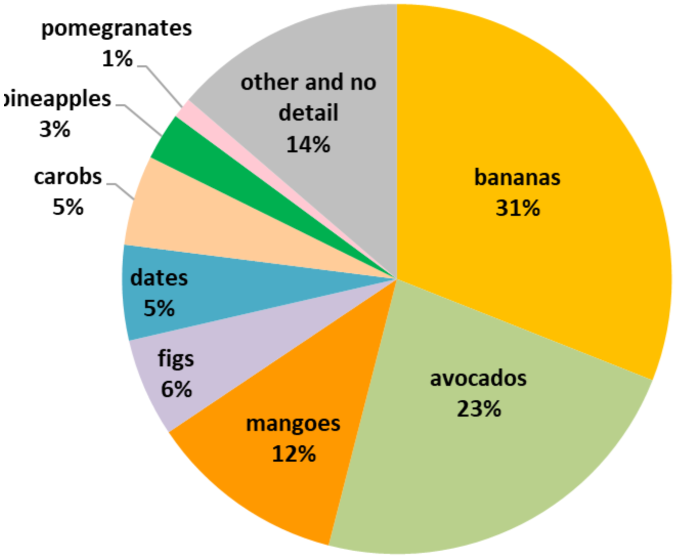
■ In 2022, 35% of the areas of organically grown tropical and subtropical fruits recorded were in Latin America, 33% in Africa, 16% in Europe and 15% in Asia. In 2022, Mexico became the leading producer of organic tropical and subtropical fruits with 30,060 ha (10% of global areas), ahead of Ethiopia (29,729 ha), Ecuador (25,006 ha) and the Philippines (24,532 ha).
In 2022, 4.9% of Mexico's tropical and subtropical orchards were organically grown. In Ethiopia, the organic share was 19.7%, in Ecuador 7.9% and in the Philippines 2.2%.

■ In 2022, the share of tropical and subtropical fruit areas grown organically was particularly high in Bulgaria (92%), Burkina Faso (74%) and Croatia (34%).

1- Excluding coconut
2- 15.1% in the EU

- In 2022, the main tropical and subtropical fruits grown organically were banana, avocado and mango.

Breakdown of areas of tropical and subtropical fruits grown organically in 2022



Source: Agence BIO from FIBL/IFOAM's data

- Organic production of tropical and subtropical fruits tends to diversify.

- The cultivation of organic tropical fruits is developing and diversifying in several European countries, especially in Spain, Turkey and Italy.

Bananas

- 91,395 ha of organically grown banana plantations were recorded in 2022 (-15% vs. 2021), i.e. nearly 0.8% of global banana plantation areas.

- In 2021, around 1.35 million tons of organic bananas were marketed, i.e. around 1% of global banana volumes.

- In 2022, 67% of organic banana plantation areas were located in Latin America. 3.0% of Latin America's banana areas were grown organically in 2022. The main organic banana producing countries in Latin America are Ecuador[1] (23,910 ha in 2022, i.e. 26% of global areas), Dominican Republic (18,513 ha) and Peru[2] (6,250 ha). In 2022, 8.7% of Ecuadorian banana plantations were grown organically. In the Dominican Republic, the share was 23.8% and in Peru 3.6%.
Organic bananas are also grown in other Latin American countries, especially Mexico and Colombia.
Organic production requires a drier climate than that of conventional bananas and the climate of Ecuador, Peru and Mexico are therefore particularly favourable to the cultivation of organic bananas.

1- Main producer of conventional bananas and the first exporter
2- Piura is the main production region with about 60% of the area.

■ In 2022, a quarter of the world's banana plantations grown organically were in Asia. However, only 0.9% of the continent's banana areas were grown organically. The main Asian producer of organic bananas was the Philippines with 20,270 ha (2nd in the world). 4.5% of banana plantations in the Philippines were grown organically in 2022.
In Vietnam, the province of Gia Lai wishes to encourage the production of organic bananas.

■ In 2022, 7% of banana plantation areas grown organically were in Africa. The share of African banana plantations grown organically remained extremely modest (0.08%). Tanzania is a major producer of organic bananas, but its areas are not known for 2022, the African areas of organic bananas are therefore very underestimated.
The other main producers of organic bananas in Africa are Kenya and South Africa.

■ Organic bananas are also produced in other countries such as Spain (Canary Islands), Samoa and Papua New Guinea.

■ In Peru, two organic banana processing plants have been installed in the Piura region to produce banana juice, powder and puree. Peru has started exporting organic banana puree to Europe.

■ The Dominican Republic and Peru represent approximately 85% of the organic banana market.
The Dominican Republic exports significant quantities of organic bananas to the European Union.
Peru exported nearly 159,000 tons of organic bananas in 2022 (+39% vs. 2021).
Organic represents over 90% of Peruvian banana exports by volume. Peruvian organic bananas are mainly exported to Europe (Netherlands and Belgium), Panama and the USA.
Over the first seven months of 2023, organic represented 8.5% by volume of Ecuadorian banana exports. Ecuadorian organic bananas are mainly exported to the USA[1].

Avocadoes

■ 67,942 ha of avocado trees were grown organically in 2022 (-31% vs. 2021), i.e. 8.0% of this fruit global area.

■ In 2022, 65% of organically grown avocado areas were located in Africa. 32% of African avocado areas were grown organically.

1- Ecuador is the leading supplier of organic bananas to the USA.

In 2022, Ethiopia was the world's leading producer of organic avocados in 2022 (29,728 ha) and Kenya was in third place (nearly 13,200 ha). Half of Kenya's avocado areas were grown organically in 2022.

■ In 2022, Latin America represented 23% of the avocado areas grown organically in the world. 2.9% of the continent avocado areas were grown organically in 2022. Mexico was in second place globally in 2022, with over 14,700 ha, i.e. 6.5% of its avocado areas. Michoacán is the main region for producing organic avocados. Mexican organic avocados are exported to the USA, the European Union, Canada, China and Japan.
Peru also exports organic avocados (over 5,000 tons per year), especially to the European Union, the USA and the United Kingdom.

Mangoes

■ Over 34,200 ha of mangoes were grown organically in 2022. Organic mangoes are produced in a large number of Latin American countries (especially in Mexico[1]), Africa and Spain.

Figs

■ 17,150 ha of figs were grown organically in 2022, i.e. 5.8% of the global area of this fruit.

■ In 2022, Europe was the main region for producing organic figs with 95% of the world's area grown organically. Turkey was the leading producer of organic figs in 2022. 27.5% of its fig orchards were grown organically in 2022.

Dates

■ 16,553 ha of dates were grown organically in 2022 (-6% vs. 2021), i.e. 0.4% of the global area of this fruit.

■ In 2022, 56% of organically grown date palm areas were located in Asia, 30% in Africa and 12% in North America. The main countries growing organic dates were Saudi Arabia, Tunisia and Pakistan. In 2022, the share of date palm areas grown organically was nevertheless still quite modest in these three countries with 3.9% in Saudi Arabia, 4.0% in Tunisia and 2.4% in Pakistan.

■ Tunisia exported 12,000 tons of organic dates in 2021. Thanks to the large areas under conversion in the Kebili region, its exports are expected to increase over the coming years.

■ Germany is a big consumer of organic dates. It mainly imports them from Tunisia. Sales of organic dates are growing in other countries, such as Italy.

1- En conventionnel, la Thaïlande et le Mexique sont les principaux pays exportateurs de mangues.

Pineapples

■ 8,128 ha of pineapples were grown organically in 2022 (-1% vs. 2021). This still represented only 0.8% of the world's area dedicated to this fruit.

■ In 2022, 54% of global areas were located in Africa and 44% in Latin America. Madagascar and Costa Rica were the main organic pineapples producers in 2022[1]. The organic share was 13.5% in Madagascar and 4.7% in Costa Rica in 2022. On the other hand, the organic share was much lower on the continental scale, with 1. 2% for Africa and 1.5% for Latin America.
In 2021, only 1.5% of the volume of fresh pineapples exported by Costa Rica was organic. Costa Rica plans to develop its organic pineapples production to sell them in the USA and Europe.
Other countries are also developing their organic pineapple production, such as Togo where 76% of production was already certified organic in 2022[2]. Zimbabwe is developing its production of organic pineapples in order to export them to the European Union. It has already started exporting it to the Netherlands.

Pomegranates

■ The areas of pomegranates grown organically amounted to 3,522 ha in 2022 (+36% vs. 2021).

■ Turkey is the leading grower of organic pomegranates, with 41% of the world's area in 2022.

Organic olive groves: mainly in the Mediterranean rim

Production

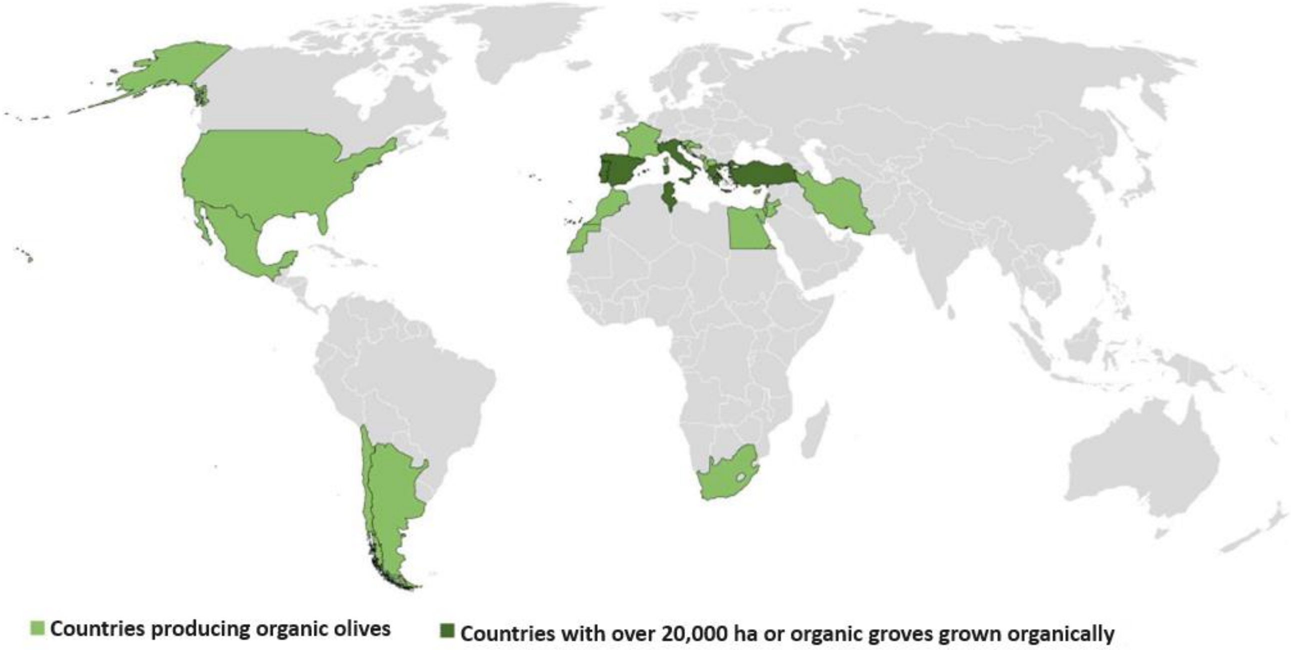
■ Over 852,600 ha of olive groves were certified organic and in conversion in 2022 (-9% vs. 2021), including around 13% in conversion. 8.2% of the global olive groves were grown organically in 2022[3].
In ten years, the area grown organically has increased by 39%.

■ In 2022, 77% of organic olive grove areas were located in Europe[4] and 21% in Africa (mainly in North Africa). In 2022, the main producers of organic olives were Spain (262,379 ha), Italy (243,089 ha) and Tunisia (173,171 ha). In 2022, the share of organic olive groves rose to 10% in Spain, 21% in Italy and 13% in Tunisia.
France is the country with the largest share of organic olive groves: 40% in 2022.

1- Conventionally, Costa Rica and the Philippines are the main producers and exporters of pineapples.
2- Over 33,700 tons of organic pineapple
3- 10.9% in Europe and 11.8% in the European Union
4- The European Union is the world's leading producer of conventional olive oil.

Almost all Italian organic olives are intended for oil production.

Countries with olive trees grown organically in 2022



Source: Agence BIO from many sources

Market

- In 2022, olive oil represented 93% by volume of Tunisian organic exports.

- In 2016, olive oil imports by the USA (the world's largest importer of olive oil) amounted to nearly €190 million (i.e. 20% of their total olive oil imports). In 2016, 44% of US organic olive oil imports by value came from Italy and 31% from Spain.

- In 2022, the European Union imported 37 thousand tons of organic olive oil (down 18% vs. 2021), which represented nearly 21% of its total olive oil imports. In 2022, Tunisia was the only supplier to the EU. A significant share of organic olive oil is imported by Italy. France and Germany are the main EU markets for organic olive oil. Germany is the leading market for organic table olives.

Organic nuts: an almost tripling of areas in a decade.

- Over 885,000 ha of nuts were grown organically in 2022 (+3% vs. 2021), i.e. 5.7% of the global area of kind of fruit[1].
Over the decade, organic nut orchards have almost tripled.
In 2022, 51% of organic nut areas were located in Europe, 29% in Africa and 17% in Asia.

- In Europe, 16.5% of the nut orchard was grown organically in 2022 (29.7% in the European Union). The main European producers of organic nuts were Spain and Italy. Nuts are also the main category of fruit grown organically in Spain.

1- In the European Union, the organic share was 29.7% in 2022.

- In 2022, nearly 121,500 ha of walnuts were grown organically, i.e. 11.0% of the global walnut orchard. China was the leading producer of organic walnuts in 2022 with 37.2% of its orchard grown organically.

- Almond trees were grown organically on nearly 257,900 ha in 2022, i.e. 11.5% of the global area dedicated to this crop. Almonds were mainly produced in Europe (97% of global areas in 2022), more precisely in Spain (95% of global areas).

- Italy and China are the main producers of organic chestnuts with respectively over 17,000 ha in 2021 and 14,000 ha in 2022.

- 1.8% of the world's pistachio orchards were grown organically in 2022, with over 14,600 ha. Turkey remained the leading producer of organic pistachios in 2022, ahead of Iran and the USA. Turkey exports a lot of organic pistachios.

- The organically grown hazel orchard still remained modest in 2022 with 2.1% of the area. Italy and Turkey[1] are major producers of organic hazelnuts.

- Kenya was the main producer of organic macadamia nuts with around 4,000 tons in 2022. Vietnam wishes to develop organic production of this fruit.

- The United States of America was the main producer of organic pecans.

- Cashew was the main nut grown organically in Africa in 2020. Organic cashew production is also developing in Vietnam.

Organic temperate fruits: almost a third of apple trees in 2022

- Over 331,600 ha of temperate fruits (excluding berries and nuts) grown organically were recorded worldwide in 2022 (+6% vs. 2021), including around 19% in conversion. However, organic areas are underestimated because figures for India, one of the main producing countries of temperate fruits, are not available.
2.8% of temperate fruit orchards recorded were grown organically in 2022.
Over the decade, organic temperate fruit orchards have seen their area increase by 63%.
In 2022, half of organic temperate fruit areas were located in Europe and 38% in Asia. China remained the main producing country of organic temperate fruits in 2022 with 38% of global areas, ahead of Poland, Italy and France.
In Europe, 6.1% of the temperate fruit orchard was grown organically in 2022[2].
In 2022, Estonia was the country with the highest share grown organically: 69.4%.
In 2022, the organic share was 2.1% in China, 14.9% in Poland and 15.2% in Italy.

- Apple remained the main species of temperate fruit grown organically, with over 108,700 ha recorded in 2022, i.e. almost a third of the world's orchard of temperate fruits grown organically.

1- Turkey is the main producer and exporter of conventional hazelnuts.
2- 12.2% in the European Union

2.2% of the global apple orchard was grown organically in 2022.
62% of the areas were located in Europe. In 2022, China and France were the main growers of organic apple trees. 1.1% of Chinese apple orchards were grown organically, while the share was 35% in France.

- In 2022, plum was in second place with nearly 38,300 ha recorded. 93% of organic plum orchards were located in Europe. Poland was the world's leading grower of organic plums.

- In 2022, over 20,900 ha of organically grown apricot trees were recorded, i.e. 3.8% of the world's apricot orchard. Turkey and China were the main producers of organic apricots.

- Nearly 18,000 ha of organically grown cherry trees were recorded in 2022, i.e. 2.6% of the global cherry orchard. In 2022, Italy was the main producer of organic cherries.

Organic citrus: almost half of the areas in Europe

- In 2022, over 115,300 ha were devoted to organically grown citrus fruits worldwide (-3.3% vs. 2021), including around 16% in conversion. Over the decade, organic citrus orchards saw their areas increase by 42%. The decline observed between 2021 and 2022 is partly attributed to citrus greening disease.
1.2% of the world's citrus orchards were grown organically in 2022[1]. Areas grown organically are underestimated because there are no statistics for India, one of the main producers of conventional citrus fruits.

- 53% of the organically grown orchards identified were in Europe in 2022, 25% in Latin America, 12% in Asia, 6% in Africa and 5% in North America[2]. Italy remained the main producer of organic citrus fruits in 2022, ahead of Spain and Mexico. The orange is the main citrus fruit produced organically in these three countries.
21.5% of the Italian citrus orchard was grown organically in 2022. In Spain, the organic share was 8.7%, while it was only 3.3% in Mexico.

- In 2022, the share of citrus orchards grown organically was also particularly high in Burkina Faso (36.7%).

- Orange was the main citrus grown organically in the world in 2022, ahead of lemons and limes. However, the share of orange trees grown organically globally remained under 0.8% in 2022.

1- 8.8% in Europe and 11.6% in the European Union
2- Organic lemon production is at its early development in French Polynesia and Oceania.

■ In 2022, lemons and limes were the most exported category of organic citrus fruits, ahead of oranges, then pomelos and grapefruits.
In 2022, South Africa was the leading country of origin for organic citrus fruits imported into the European Union and the USA. These are mainly oranges.
In 2022, Mexico exported over 8,700 tons of organic citrus fruits to the USA and the European Union.

Organic berries

■ Over 87,500 ha of organically grown berries were recorded worldwide in 2022 (- 17.5% vs. 2021), i.e. 14.6% of the global area of this fruit category.
The area of organically grown berries has almost doubled over the last ten years.
In 2022, 46% of organic berry areas were located in Europe, 27% in North America and 25% in Latin America.
In Europe, 13.0% of berry areas were grown organically in 2022. The share was even 24.8% in the European Union.

■ Blueberries remained the main berry species grown organically in 2022 with nearly 13,900 ha, i.e. 8.7% of the global area of this berry. Canada was the main grower of organic blueberries with nearly 9,400 ha in 2022 (mainly in Quebec), ahead of Chile and the USA.
In Canada, 22% of blueberry areas were grown organically in 2022. In the USA, the share was 9% in 2021.
Chile's organic blueberry exports exceeded 20,000 tons in 2021 (18% of its total blueberry exports), representing over half of Chile's organic exports. The USA is the main destination of Chilean organic blueberries.
The production and export of organic blueberries is also developing in Argentina, Peru[1] and Mexico. The USA is the main destination for organic Peruvian blueberries. However, organic blueberries sold in the USA are mainly imported from Chile and Mexico.

■ Over 3,100 ha of raspberries were grown organically in 2022, i.e. 2.9% of the world's raspberry areas. Mexico was the main producer of organic raspberries in 2022. Nearly 20% of Mexican raspberry areas were grown organically in 2022.

■ In 2022, over 1,500 ha of cranberries were grown organically, i.e. 6.6% of the global area of this fruit. This figure is probably underestimated because the US areas are not known.
In 2022, Canadian areas have declined significantly, and Argentina has become the leading producer with over 1,300 ha. Quebec is the main Canadian province for the production of organic cranberries.

1- Leading exporter of conventional blueberries

Organic fruits and vegetables market

- Fruits and vegetables are one of the main categories of organic products consumed in most countries with, for example, 37% of the organic market in Denmark in 2022, 23% in Switzerland or even 19% in Germany.

- In countries where organic consumption is developed, organic represents a significant share of fruit and vegetable purchases, as in Austria[1] and Switzerland[2].

- The USA is the main market for organic fruits and vegetables. In 2023, with over €18 billion, they represented over 15% of national sales of fresh fruit and vegetables. The main organic fruits and vegetables sold in 2023 were avocados and berries (including strawberries, blueberries, raspberries and blackberries).
During the 2022/2023 campaign[3], the USA imported €1.7 billion worth of organic fruits and vegetables, almost a five-fold increase in ten years. Blueberries were the most imported organic fruit in 2022/2023 with €349 million, ahead of bananas with €308 million.
The USA imported nearly 648 thousand tons of organic tropical and subtropical fruits in 2022, including 230 thousand tons of bananas. In 2022 and 2023, Ecuador, Mexico and Colombia were the main suppliers of organic bananas to the USA.

- Europe comes in second place, with significant consumption of organic fruits and vegetables, especially in Germany, Italy, France, Denmark, Spain and Switzerland.
In 2022, the European Union imported nearly 1.3 million tons of fresh and processed organic fruits and vegetables, including 785 thousand tons of tropical and subtropical fruits[4], 87 thousand tons of nuts and spices, 43 thousand of tons of citrus fruits, 119 thousand tons of other fruits and 109 thousand tons of vegetables.
Argentina is the main supplier of organic apples and pears to the EU. There is also a big intra-community trade in organic apples. Turkey and Egypt were the main suppliers of vegetables to the EU in 2022.

- Bananas and carrots are the most popular organic fruits and vegetables in many countries. For example, in Denmark, organic represented 80% of sales by value of organic bananas in 2022 and 53% of carrots.

1- 20.5% of organic vegetable sales by value in 2021, 24.1% of potatoes and 14.2% of fruit.
2- 22.4% of organic fruit and vegetable sales in value in 2022.
3- September 2022 to August 2023
4- Including 706 thousand tons of bananas

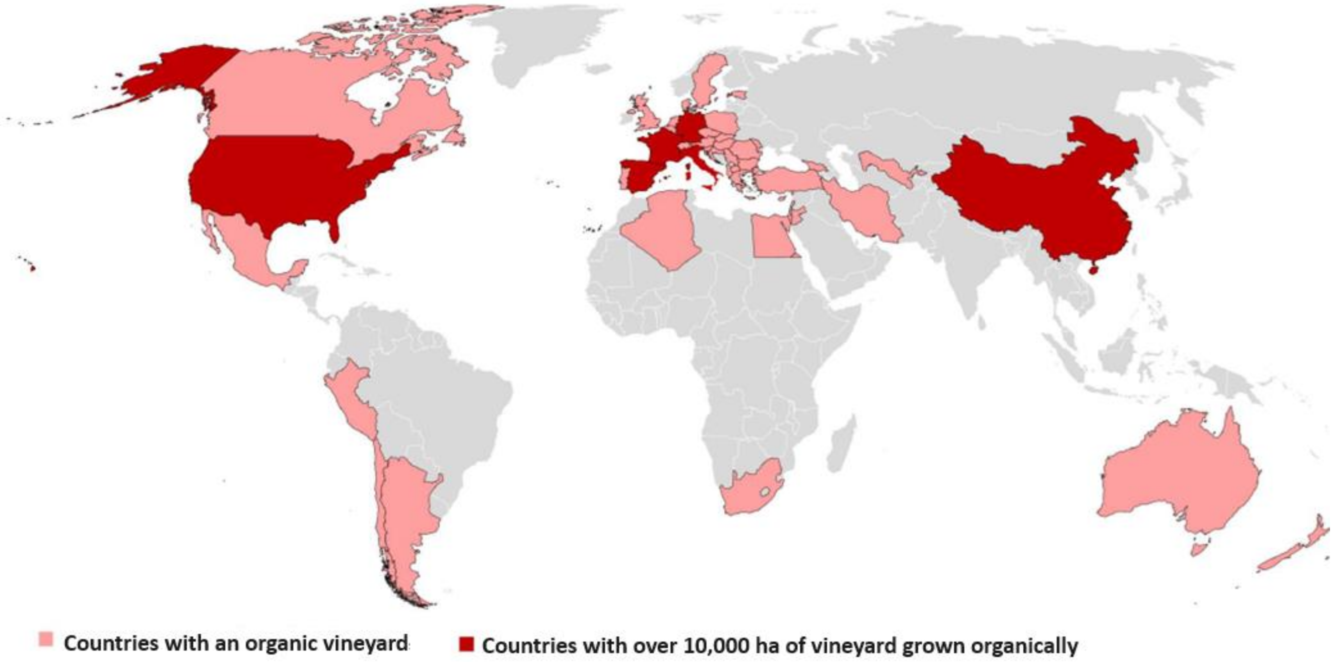
Organic vineyard: 87 % of the global vineyard in Europe

Production

■ In 2022, the global organic vineyards covered over 561,500 ha (+3.2% vs. 2021), i.e. 8.3% of the world's vineyard areas[1]. Nearly 23% were in conversion in 2022.
Over the last ten years, the global organically grown vineyards have increased by 78%.

■ Most of the world's organic vineyards are dedicated to wine grapes. However, in some countries, such as Turkey, a significant share of the vineyard is intended for the production of table grapes or raisins.

Countries with a vineyard grown organically in 2022



Source: Agence BIO from many sources

■ Around fifty countries had an organic vineyard in 2022. 87% of organic vineyards were located in Europe. The top three global producers of organic grapes were France, Spain and Italy. The share of national organic vineyards was significant in these three countries: 21.5% in France, 16.1% in Spain and 18.1% in Italy.
China came in fourth place in the world in 2022 with over 3% of the world's organic vineyards. 3.1% of Chinese vineyards were grown organically in 2022.
It was followed by the USA, Germany and Austria.
In Latin America, the two main organic vineyards remained Argentina and Chile. 4.7% of Argentinian vineyards were organically grown in 2022 and 3.3% of Chilean vineyards. Argentine organic wines are mainly intended for export, primarily to the European Union and the USA. Argentina exports around 100,000 hl of organic wines per year.

1- 15.0% in the European Union

In 2022, 4.3% of Australian vineyards were grown organically. Organic wines are mainly produced in the south of the country. In New Zealand, most of the production is located in the Marlborough region. Pinot noir and Sauvignon blanc represent over two-thirds of organic wines produced in New Zealand. New Zealand exported nearly €38 million worth of organic wines in 2020.
In South Africa, 3.3% of the vineyards were grown organically in 2022.

Market

- In France, the organic wine market amounted to €1.2 billion in 2022 (+2% vs. 2021). Organic wines consumed in France are mainly of national origin.
Germany is the world's leading importer of organic wines (main origins: Spain, Italy and France). However, it also exports organic wines.
The USA is an important market for organic wine, with sales amounting to €341 million in 2023 (+2.5% vs. 2022). French wines represent around 40% of the volumes of organic wines imported by the USA. The USA exports a small part of its organic wine production.
The demand for organic wine is growing in Canada. Monopolies, like the SAQ for Quebec, have increased their organic range.
In Asia, the organic wine market is still quite limited, even if there is growing interest in organic wines in the south of the continent. Three-quarters of organic wines imported by Japan come from France. South Koreans are increasingly interested in organic wines.
Organic wines are increasingly popular with Australian consumers.

Organic flagrant, aromatic and medicinal plants

- In 2022, the global areas of flagrant, aromatic and medicinal plants grown organically approached 224,000 ha, an increase of 81.5% compared to the previous year. 9.9% of global areas were grown organically.
Over the last decade, the areas grown organically have increased more than sixfold. In 2022, Madagascar, Guatemala and Vietnam probably remained the leading countries growing these plants.
In Europe, Bulgaria is the main grower of these plants, with mainly organic roses (in the Kazanlak Valley, in the South of the Balkans), but also organic lavender. Around 15% of Bulgarian rose gardens are certified organic and almost twenty distilleries are involved in the production of organic rose oil.

- In addition to these crops, over 4 million ha of wild flagrant, aromatic and medicinal plants picking[1] are added. Organic plants picking is widely practiced in Namibia, North Macedonia, Kosovo, Kenya and South Africa.

1- Wild roses included

In 2022, Latin America exported over 35 thousand tons of organic perfume, aromatic and medicinal plants to the European Union and the USA. In 2022, Asia exported over 23 thousand tons of this kind of plants to the European Union and the USA.
In 2022, Africa exported over 3.4 thousand tons of organic perfume, medicinal and aromatic plants to the European Union and the USA.
Regarding Europe, Albania[1] exports a lot of organic aromatic herbs from wild harvests. Bulgaria exports most of its organic rose oil production, mainly to other EU countries.
North America and Oceania export very little organic perfume, medicinal and aromatic plants.

1- Wild picking areas are not detailed for Albania.

Focus on organic breeding

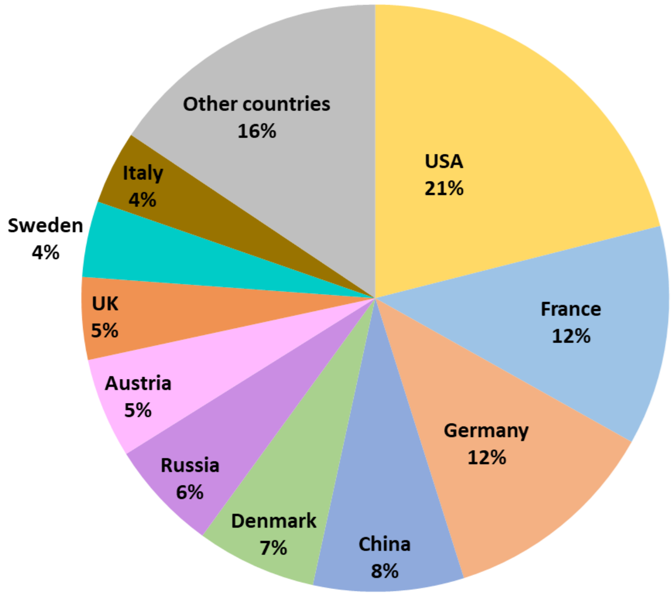
Organic cow milk: the USA in the lead

Production

■ According to our estimates, global production of organic cow's milk exceeded 11 million tons in 2022, which only represented only 2% of global cow's milk production.

■ The USA remained the leading country producing organic milk[1] in 2022, ahead of France and Germany[2].

Breakdown of global organic milk production in 2022[3]



Sources: Agence BIO from different sources

■ US organic milk production exceeded 2.3 million tons in 2019, i.e. only 2.3% of the country's milk production. California is the state where organic dairy production is most developed, with nearly a quarter of the country's certified organic dairy cows in 2020. The state of Maine stands out with the highest share of its dairy farms in organic: a fifth in 2020. The main US organic dairy cooperative, Organic Valley, was created in the late 1980s. It collects a third of the organic milk produced in the country. The USA exports a very small part of its organic milk production, mainly to Mexico.

■ Canada produced nearly 154 thousand tons of organic milk during the 2022/2023 campaign (almost stable compared to the previous campaign). Quebec is the leading province producing organic milk[4].

1- In conventional, the main producers are India, the USA and China.
2- In 2023, Germany overtook France.
3- This is an estimate because not all countries have published a figure for 2022.
4- Quebec and Nova Scotia represented 47% of Canadian organic milk production in 2022/2023.

■ The EU's organic milk production exceeded 5.9 million tons in 2022. The number of farm conversions to organic increased after the deregulation (end of milk quotas) of the EU market in 2015, as farmers sought greater market stability. In Germany, the organic milk deliveries approached 1.4 million tons in 2023 (+5% vs 2022). The organic share in the national milk collection was 4.2% in 2022. Of the forty German dairies with an organic activity, thirteen are completely organic. A large share of organic milk is collected by five dairies, one of which is completely organic. Bavaria accounts for almost half of Germany's organic milk collection[1].

In 2023, France fell behind Germany, with deliveries approaching 1.3 million tons (-4.5% vs. 2022). The organic share in national collection reached 5.5% in 2022. Brittany and Pays de la Loire are the two main French regions for organic milk collection.
In Austria, organic milk deliveries increased by 3.2% in 2022 compared to 2021, reaching over 693 thousand tons.
In Denmark[2], organic milk collection fell by 4.4% in 2023, reaching over 692 thousand tons, i.e. 12.6% of the national collection.
In Sweden, organic milk collection decreased by 5% in 2022, reaching nearly 460 thousand tons in 2022, i.e. just under 15% of the national milk collection.

■ Regarding other European countries, Russia comes in first place with production which would have amounted to 670,000 tons in 2018, just for the Moscow region. This milk seems to be mainly used for infant nutrition.
In the United Kingdom of Great Britain, organic milk deliveries amounted to nearly 500,000 tons in 2021. It has declined in recent years. 60% of the collection is made by a completely organic cooperative.
In Switzerland, organic milk production exceeded 282 thousand tons in 2022 (-1.9% vs. 2021), i.e. 8.5% of national milk production. During the first seven months of 2023, organic milk production fell by 2.4% compared to the same period of 2022.
In Norway, organic production amounted to over 51,000 tons in 2020.

■ In China, ten organic dairies have been created over the last decade. Organic production exceeded 911,000 tons in 2018. The production and processing of organic milk is also developing in other Asian countries, such as Laos and Vietnam.

■ In New Zealand, an increasing number of dairy companies are getting involved in the organic sector. New Zealand exported nearly €59 million worth of organic dairy products in 2020.

■ According to estimates, Australian organic milk production must have approached 61,000 tons in 2018. The production of organic milk powder has been developing for

1- Compared to a quarter for conventional milk

2- The Danish company Arla Foods is the world's largest producer of organic dairy products and sells them in over 120 countries.

several years. The State of Victoria is the main area for the production and processing of organic milk. In 2018, 67% of organic milk processors were located in this state.

- In Argentina, organic milk production is starting to develop. The country had just over 4,000 organic dairy cows in 2021. Buenos Aires is the main region for organic milk production.

Market

- The global market for organic dairy products has been estimated at €22.5 billion in 2022.

The introduction of organic product ranges by international dairy brands has contributed to the greater presence of organic dairy products in the global market.
Liquid milk is the main organic dairy product consumed worldwide. The USA represents the largest market for organic liquid milk.
In many countries, as the market for organic dairy products grows, production is diversifying. Infant milk formulas are one of the fastest growing categories of organic dairy products. According to the IMF, the market for organic milk powders is expected to exceed €2.8 billion by 2027.

- The USA is the world's leading market for organic dairy products with over €4.3 billion in 2021. It is the second best-selling category of organic products behind fruits and vegetables. Milk is the main organic dairy product sold. For several years, organic milks have suffered from the growth in popularity of milk substitutes and competition from other milks ("GMO-free", "grass-fed cows" and "protein-enriched").

- Regarding Europe, dairy products are one of the main categories of organic products sold in many EU countries. However, in many European countries, organic dairy products are currently victims of inflation and household budgetary decisions. In 2022, France and Germany were the main markets for organic dairy products. In France, it reached €1.2 billion in 2022 (-4.6% vs. 2021), i.e. nearly 10% of the French organic market.
In Germany, the organic dairy market has exceeded €1.1 billion for several years according to estimates. In this country, organic products represent a significant share of the national consumption of dairy products. The category with the largest organic market share is liquid milk (15.6% in value in 2022). Despite the growth in its collection, Germany remained dependent on imports of milk and other organic dairy products from Denmark and Austria. According to initial estimates, in 2023, demand for organic milk has stagnated or even declined in Germany, in a context of increasing national supply.
The Italian market for organic dairy products approached €700 million in 2020. Fresh milk is the main organic dairy product consumed by Italians. Italy imports between 30,000 and 40,000 tons of organic milk per year, mainly from Austria and Slovenia.
In Switzerland, organic dairy sales amounted to €409 million in 2022. This is the main category of organic products purchased in Switzerland. 11.7% of dairy product sales in 2022 were organic.

Europe remains one of the largest markets for organic infant milks. It is also the largest producer of infant milk, both organic and conventional. Only a modest share of cheeses sold in Europe is organic (3.8% by volume in Germany in 2020).

- In Canada, milk is the main organic dairy product consumed. Organic milk demand has almost stagnated in Quebec since 2020. Part of the organic milk produced in this province is not sold as organic.

- Asia represents a growing opportunity for organic dairy products.
In China, organic dairy market amounted to nearly €1.5 billion in 2022. Liquid milk is the main organic dairy product consumed in China. China is also one of the main markets for organic infant milk. It imports organic milk powder, especially from Australia, New Zealand and Europe.
In India, organic milk sales reached €112 million in 2023.
In South Korea, the organic milk market reached €72 million in 2020.
In Japan, organic dairy products are still difficult to find in traditional supermarkets, outside of Tokyo or Osaka. Japan imports organic dairy products, especially from Australia. Domestic supply is still very limited.
For several years, the Danish company Arla Foods has been selling organic milk in the United Arab Emirates and Malaysia.

- In Australia, the organic market share of milk has exceeded 4%. For the moment, the market for organic infant milks is relatively small.
In New Zealand, sales of organic dairy products are growing rapidly, but the organic market share remains modest. New Zealand exports organic milk.

- In Latin America, sales of organic infant milk are still underdeveloped, but are expected to increase over the coming years.

- The organic infant milk market is growing in other countries, such as Lebanon and South Africa.

Meat sectors: heterogeneous development from one continent to another

Organic cattle

- Organic cattle breeding is much more developed in Europe, especially in the European Union, than in the USA and Australia. The main organic cattle breeding countries in Europe are Germany and France. The European Union had over 4.9 million certified organic cattle in 2022 (+3% vs. 2021), i.e. 6.6% of its cattle herd.
In 2022, 6.9% of beef production was certified organic in Germany.
In the United Kingdom, 298,600 cattle were raised organically in 2022, i.e. 3.1% of the national cattle herd.

- Nearly a third of Australian organic producers raised cattle in 2016. The state of Queensland is the main area for organic beef farming. Beef is Australia's most exported organic product.

- In China, around 840,000 cattle were certified organic in 2019, i.e. only 1.85% of the Chinese cattle herd.

- Organic cattle breeding is still modest in Argentina (a little over 49,500 organic cattle in 2021). The main breeding regions are Buenos Aires, Córdoba and Salta.
In Chile, organic farming is still extremely modest and seems mainly intended for the domestic market.

Organic pigs

- Organic pig farming is much more developed in Europe than in the USA.

- France and Denmark are the main organic pig breeding countries in Europe. The European Union had over 1.5 million certified organic pigs in 2022, i.e. only 1.2% of its herd. In France, only 1.9% of the national sow herd was certified organic in 2022.

- In Switzerland, 37,700 pigs were certified organic in 2022, i.e. just under 3% of the national herd.
In the United Kingdom, 35,000 pigs were raised organically in 2022, which represented only 0.7% of the national herd.

- In China, nearly 240,000 pigs were certified organic in 2018, i.e. less than 0.04% of the Chinese pig herd.

Organic sheep

- Organic sheep farming seems to be more developed in Europe than in the rest of the world.

- In 2022, the European Union had nearly 4.9 million certified organic sheep (stable vs. 2021), i.e. around 8% of its sheep herd. Greece came in first position with 35% of the EU organic sheep herd, ahead of Italy (17%) and Spain (13%).
Austria stands out for its organic share: 30% in 2020.

- In the United Kingdom, 734.4 thousand sheep were raised organically in 2022, i.e. 2.2% of the national herd.
In Türkiye, Marmara is the leading region for organic sheep farming.

- In China, around 4 million sheep were certified organic in 2019.

- In Australia, less than 1% of lamb production was organic in 2008. The current Australian herd is not known.

- In New Zealand, nearly 65,000 organic lambs were slaughtered in 2017.

■ The Argentinian organic sheep herd exceeded one million animals in 2021. Organic sheep farming is mainly located in the provinces of Santa Cruz and Chubut.

Organic meat market

■ Europe and North America are the main markets for organic meat. US organic meat sales exceeded €1.7 billion in 2021 (2.5% compared to 2020).
Germany and France are the leading EU markets for organic meat. In Germany, the organic beef market amounted to around €186 million in 2020 and that of organic pork to €121 million. Germany imports organic pork from other Member States[1]. It imports little organic beef.
In France, organic meat sales (excluding poultry) amounted to €582 million in 2022 (-12% compared to 2021).
In Switzerland, organic meat sales amounted to €274 million in 2022, they are growing less quickly than those of other categories of organic products.

■ In China, the largest producer and consumer of conventional meat, organic meat demand is growing.

Organic poultry sector: European Union in the lead

Organic broiler poultry

■ In 2022, the European Union has the biggest flock of organic broilers globally: 25.6 million. France remained in first place with over 13.6 million organic broilers, far ahead Belgium (nearly 4.2 million).

■ The USA was the second largest producer of organic broilers, with over 19.5 million animals in 2020. Pennsylvania leads in organic broiler production.

■ In the United Kingdom, nearly 1.6 million broiler chickens were raised organically in 2022, i.e. 1.3% of the national flock, as well as nearly 84 thousand other broiler poultry (0.4 %).
In Switzerland, 358 thousand broiler chickens were certified organic in 2020.

■ In China, nearly 1.51 million chickens were certified organic in 2018.

■ In 2020, the global organic poultry market was estimated at nearly €7 billion. The USA is the main market for organic poultry, with over €880 million in 2021. Chicken is the main species sold organically (€600 million in 2020), ahead of turkey (€67 million in 2020).
The main EU markets for organic poultry meat are France, Germany and Italy. The French market for organic poultry meat amounted to €268 million in 2022 and the German market to €168 million in 2020. In Italy, poultry represents around three-quarters of the organic meat market.

1- In 2022, only 0.8% of German pork production was certified organic.

Chicken is the main organic meat consumed in the United Kingdom.

Organic eggs

- The EU is the world's leading producer of organic eggs, with a flock of nearly 29.4 million organic laying hens in 2022. France and Germany are the main EU producers of organic eggs. In 2023, Germany produced 1.8 billion organic eggs, i.e. 13.4% of national production.

- The USA was the second largest producer of organic eggs in the world (15.7 million heads in 2020). Wisconsin and Pennsylvania are the leading states for organic egg production.

- In the United Kingdom, over 2 million laying hens were raised organically in 2022 (5% of the national laying hen population).
In Turkey, over 800 thousand laying hens were certified organic in 2022.
In Switzerland, the certified organic flock approached 700,000 hens. Swiss production of organic eggs doubled between 2011 and 2021.

- The breeding of organic laying hens is just beginning to develop in Argentina, mainly in the province of Buenos Aires.

- Organic egg is a very popular product in Europe. The organic market share of eggs is high in a number of European countries, such as Denmark, Switzerland and Germany.
The French organic egg market amounted to €611 million in 2022 (+1% vs. 2021), while the German market was estimated at €440 million in 2020. In Italy, the organic egg market increased to €167 million in 2023 (+10% vs 2022).
In 2022, organic eggs sales in Switzerland amounted to €129 million, with a market share of 28.7% in value.

- In 2021, US organic eggs sales amounted to over €1 billion, i.e. over 15% of retail egg sales.

Organic beekeeping: 3.4 % of global hives were organic.

- Nearly 3.41 million organic hives were recorded worldwide in 2022. Their number has more than quintupled in five years.

- In 2022, 36.6% of organic hives were in Latin America and over 31.5% in Europe. In 2022, Zambia became the country with the most organic hives (around 758,000), surpassing Brazil (nearly 630,000). Mexico came in third place (over 448,000). The production of these three countries is mainly intended for export.

■ Experts expect organic beekeeping to continue its development thanks to the growing demand for organic honey and bee products. The two major challenges are conversion, particularly due to the difficulty in accessing knowledge on organic beekeeping practices, and the fight against the Varroa parasite.

■ The organic honey market has been estimated at €994 million in 2022.

■ The USA and Europe are the leading markets for organic honey. In 2020, the EU imported nearly 15 thousand tons of organic honey. China still seems to be the main origin of organic honey imported into the European Union.

Organic aquaculture: Over 330,000 tons produced in 2022

■ The IFOAM Aquaculture Group was founded in 2003. In 2005, IFOAM adopted a standard for organic aquaculture. Legislation on organic aquaculture has been put in place, notably in the European Union, Norway, Canada, Brazil, China and India.

■ Global organic aquaculture production has been estimated at over 330,000 tons in 2022 but is underestimated because data is not available for countries with significant aquaculture production such as Brazil and Indonesia.
According to FIBL/IFOAM, Europe represented 57% of global organic aquaculture production in 2022 and Asia 43%. The main organic aquaculture producers were China, Norway and Ireland.

■ The global distribution by species is only available for a quarter of global aquaculture production. According to available statistics, the main organic aquaculture productions are salmon[1] (over 45 thousand tons with trout and smelt), mussels (over 39 thousand tons), aquatic plants (over 21 thousand tons) and sea bass (over 4 thousand tons).
In total, around thirty species are raised organically: crustaceans (shrimp, crayfish, crab, lobster and langoustine), fish (salmon, sea bass, trout, carp, catfish, sea bream, sturgeon, char, tilapia, carp, sea bass, silver perch, cod, etc.), molluscs (mussels and oysters). Sea cucumbers, seaweed and samphire are also produced.
Organic fish production has developed more in Europe, Asia and Latin America than in other continents.
Organic shrimps are produced in Latin America (Ecuador, Peru and Brazil), Africa (mainly in Madagascar), Asia (notably in Vietnam, Thailand, Bangladesh, Kerala in India and Indonesia) and, recently, in the USA (Florida and California).
Europe mainly produces organic mussels[2] and fish, especially salmon, sea bass, sea bream, several species of trout and carp. In Latin America, shrimp is the main species produced. In Asia, the main organic aquaculture species produced are shrimp, catfish

1- Norway is the main producer of organic salmon, ahead of Scotland.
2- Over half of EU organic aquaculture production

and carp. Canada produces organic fish, as well as shellfish and algae. Australia and New Zealand produce organic molluscs.

- The European Union is the leading market for organic aquaculture products worldwide. In 2022, the European Union imported over 14 thousand tons of organic fish (-12% vs. 2021). The main consuming countries of organic aquaculture products in the European Union are Germany, Italy and France.
The United Kingdom is also an important market for organic fish, although organic salmon sales have declined in recent years.
In Switzerland, organic represented 12% in value of fish purchases in 2022.

- The organic fish market is growing in Asia.

- The US organic fish and seafood market is still relatively modest. Only 0.3% of shrimps imports by volume are organic (250 tons).

Willingness to develop the organic sector and public policies.

- Since organic farming is seen as a very sustainable kind of agriculture, many governments are supporting its development.

- They have a vital role in the development of organic farming and market in their country.
For several years, public-private cooperation has also been increasing in a large number of countries, on all continents. The role of associations and NGOs is also very important.

IFOAM's actions

- The International Federation of Organic Agriculture Movements was created in 1972. This umbrella organization carries out numerous actions to develop organic farming around the world. It has succeeded in facilitating the construction of a dynamic organic movement and sector on a global scale, with active institutions and local and global organic sectors. Its mission has evolved. For a long time, IFOAM has been professionals-oriented and focused on unifying and supporting its members. Now, it is also about the overall strategic planning of global organic movements for growth and sustainable development, in order to increase positive impacts on the planet and people.

- IFOAM has supported and promoted participatory guarantee systems since 2004.

- The 21st IFOAM World Congress will take place in Taiwan in 2024.

In Europe

In the European Union

- In some EU countries, support for the organic sector began in the 1980's or 1990's. Between 1987 and 1993, many EU countries introduced subsidies for conversion, or even maintenance, on a national or regional basis.

- At the level of the European Commission, a third action plan to develop organic farming in the European Union was launched in 2021 and runs until 2027[1]. It aims to develop areas grown organically and to support organic consumption. This plan follows the Farm to Table Strategy adopted in 2020. This action plan is structured around three main axes: stimulating demand for organic products while maintaining consumer confidence, encouraging an increase in areas grown organically in the EU and strengthen the role of organic production in the fight against climate change and the loss of biodiversity.
A European organic day has been created; it takes place on September the 23rd. During this day, the European organic production awards ceremony is organized.

1- The previous one took place from 2014 to 2020.

A database gathering numerous studies on organic farming[1], Organic Eprints, was launched in 2002.
The European Commission has also supported research in organic farming since the mid-90's: Ok-Net Arable, OK-Net Ecofeed, LIVESEED, RELACS, CORE ORGANIC, BIOFRUITNET, PPILOW…
It co-finances programs to promote organic products[2]. In 2021, it devoted a budget of €40 million to promotion. For 2024, the planned budget amounts to €42 million.

■ Regarding the Member States, the Common Agricultural Policy remains one of the major financial support tools for the development of the organic sector. Measures to promote its development are included in numerous strategic plans of the current CAP. Some countries have provided significant budgets in their current NSP to support organic farming, such as Italy (€2.5 billion) and Germany (nearly €2.4 billion). A number of other Member States have increased the budget to support the organic sector. Most Member States offer conversion subsidies and, for a certain number of them, also maintenance subsidies.
IFOAM Organics Europe believes that many member states have lacked ambition for the development and support of organic farming in their NSP. It seems unlikely that the European Union will achieve its goal of 25% of UAA organic by 2030.

■ At the same time, national or regional development programs have been put in place by a certain number of Member States. In 2023, plans were underway in Germany, Austria, Wallonia, Bulgaria, Denmark, Ireland, Luxembourg, Malta, the Netherlands, Portugal, the Czech Republic and Sweden. Others were in preparation in Flanders, Spain, France, Hungary and Italy. The actions carried out within the framework of these organic plans are very varied: demonstration days or demonstration farms, support for the introduction of organic products in collective catering, development of organic regions, support for investment, establishment of weeks or organic month, creation of regional/national organic brands with a logo, free organic training, free or partially reimbursed organic certification, actions with schools, etc.

In other European countries

■ The Albanian Organic Agriculture Association (OAA) was established in 1997 by a group of agricultural advisors and farmers. Its goals are in particular to promote organic farming, to encourage the creation of farmers' groups and marketing channels for organic products, to advise companies and groups of farmers for production, processing and marketing of organic products, to offer training, workshops, conferences, publications and study tours to its members and to assist the government and other institutions in establishing agricultural laws and policies.
FIBL supported the development of the Albanian organic sector during the 2000s.
The first law on organic farming was promulgated in 2004. There has been support for organic farmers since 2008.
The Institute of Organic Agriculture was created in 2010. It trains and advises organic operators and disseminates research results to them.
The EU supports Albanian organic farming under a program running until 2027.

1- Over 35,000 in 2023
2- Like "Cuisinons plus bio" in France

■ In Belarus, organic farming is still very little developed. The national goal is to achieve between 3 and 4% of the UAA in organic farming by 2030.
Baranovichi State University offers courses on organic farming and conducts research in this area. Part of its educational farm is certified organic.

■ The two main entities of Bosnia and Herzegovina have adopted a law on organic farming, in 2013 for the Republic of Srpska and in 2016 for the Federation of Bosnia and Herzegovina, but this is not the case for the Brčko district.
Despite the existence of two separate laws on organic production (aligned with EU regulations on organic production), one of the requirements set by the European Commission in the EU pre-accession and integration process is the adoption of a common national law on organic production.
The Republic of Srpska has implemented an organic logo, while there is none in the Federation of Bosnia and Herzegovina.
In the Federation of Bosnia and Herzegovina, there is financial support for organic producers and a subsidy for certification. The Republic of Srpska provides subsidies for conversion to organic farming and certification. It is also possible to receive subsidy for investment in equipment dedicated to organic production. It is possible to receive financial subsidy in the Brčko district, however, no applications have been made in recent years.
In 2022, the Ministry of Agriculture of the Republic of Srpska established a department dedicated to organic farming. It offers some training in organic farming and has developed a guide for the conversion of producers. The Ministry has set up a group of regional organic advisors. The Ministry of Agriculture promotes organic production at agricultural fairs, with the help of the Trade Chamber and organizes an organic fair: Organic Fest of Srpska.
In the Republic of Srpska, an organic association, BIOTP, was created in 2022. It has around fifty members. An organic group has been created in the Trade Chamber. The Faculty of Agriculture of the University of Banja Luka and the Agricultural Institute of Banja Luka are involved in organic farming.
The Federation of Bosnia and Herzegovina has several regional organic associations. Organic farming is taught at several universities, including Sarajevo and Bihać. The organic sector is also supported by the European Commission, by several European organizations (in particular Italian, German and Swedish) and by USAID.

■ In Georgia, the two main organic organizations are Elkana, established in 1994, and SEMA, founded in 2006. They both provide technical advice to producers.
Supporting organic production is one of the main missions of the Agricultural Scientific Research Center, which was created in 2014.
Organic farming is taught at the Tbilisi Agricultural University.
Between 2019 and 2022, the EU co-financed the GRETA project on sustainable mountain tourism and organic farming.
A PGS has been implemented in western Georgia.
A national program has been launched to promote the production and certification of organic products as part of the Georgian Prime Minister's green economy initiative. It provides co-financing and tax incentives to producers and/or processors, as well as support for certification and technical training.

■ In Iceland, there are no specific target related to organic production nor consumption. Under Icelandic agricultural policy, subsidies are available to producers

who wish to convert their agricultural land to organic. The total amount available is approximately €300,000/year. This program was launched in 2017.
There is an organic farmers' union, Verndun Og Ræktun, but it only has around thirty members.

- In Kosovo, a law on organic farming was adopted in 2012.

The current national action plan for organic agriculture began in 2022 and will end in 2024.
Organic farmers receive state subsidies.
The Organika association represents Kosovar organic processors and exporters.
The Faculty of Agriculture and Veterinary Medicine of the University of Prishtina has research and teaching activity on organic farming.
Training and advice in organic farming are offered, in particular, by the Ministry of Agriculture and Organika.
Several foreign organizations, such as USAID and GIZ, support the development of organic farming in Kosovo.

- In the Republic of North Macedonia, the first campaign to promote organic products took place in 2010. A national plan for organic farming was established for the period 2013-2020. Its goals were to strengthen the competitiveness of the organic sector, develop production and consolidate organic producer associations.

Subsidies for organic producers were substantially increased in 2015.
There are several organic associations.
Organic farming advice is still underdeveloped.
Organic farming training is offered at two universities: Ss. Cyril and Methodius University in Skopje and Goce Delchev in Stip.
The Consumers' Organization of Macedonia led a campaign to promote organic food.

- In Moldova[1], there is government subsidies for conversion to organic farming and investment. A national organic logo was created in 2010.

Moldovan organic farming is also supported by TAIEX and the Czech Development Agency.
There are several organic organizations which seem quite complementary.
Several research institutes are carrying out work on organic farming. Balti University offers training on organic farming.

- In Montenegro, the first law on organic farming was adopted in 2004.

The national association of organic producers, Organic Montenegro, was created in 2011. The first national action plan dedicated to the organic sector took place between 2012 and 2017. The goal was to support the development of production, processing and the domestic market. The government has been providing subsidies to organic farmers since 2017. In 2016, a weekly organic market was established in Podgorica to allow organic producers to sell their products. A project to promote organic products was launched the same year.

1- Poorest country in Europe with a largely rural population.

The University of Montenegro has introduced a course on organic farming for agriculture students. It also has research activity in organic farming.

- In Norway, a national strategy for organic farming began in 2019[1]. It runs until 2030. The goal is to stimulate organic production which does not meet demand. The actions concern knowledge and skills, facilitation of organic production and the development of an efficient value chain. There are conversion subsidies.
The Norwegian Center for Organic Agriculture, NORSØK, is a research institute and competence centre for organic agriculture.
Oikos - Organic Norway, is the national organic movement. It provides information on the organic sector and promotes it.
Additionally, all conventional farmers wishing to convert their farm to organic farming have access to free advice from the Norwegian Advisory Service.

- Currently, the United Kingdom of Great Britain does not have a national organic strategy.
The United Kingdom of Great Britain has developed its own environmental land management program, Environmental Land Management, intended to replace the CAP.

As part of its Organic Food and Farming Action Plan, the Scottish Government has committed to at least doubling the area grown organically by 2026. However, the current growth rate is not expected to enable this goal to be achieved. A new action plan for the Scottish organic sector is being developed.
In England, subsidies continue to be paid to organic producers.
In Wales, conversion subsidies have been abolished, but will be paid again from spring 2024.
Northern Ireland continues to support organic farming through its Environmental Farming Program.
The Soil Association is the UK's leading certification body for organic products. This is a non-profit association. It also has other actions on organic, such as promotion, actions on collective catering, or even analysis of the British organic market.

- In Russia, the Ministry of Agriculture has set up organic training courses and developed a directory of organic operators. An organic strategy for 2030 is in preparation.
There are several organic associations. The Organik Foundation promotes the consumption of organic food and supports Russian organic producers.
An organic agriculture research institute was created in 2016.

- The Principality of San Marino aims to become completely organic. A certification body should be created soon.

- In Serbia, subsidies are paid to organic farmers. Their amounts have increased significantly in recent years.

1- A budget of €17.8 million has been allocated to this strategy for the year 2019.

The second[1] action plan for organic farming started in 2021 and will end in 2026.
Organic farming was integrated into farmers' curricula in 2014. Several universities, including Belgrade and Novi Sad, are involved in organic farming (training and research).
Public advisors provide information on organic farming.
The national organic association is called Serbia Organica. It was created in 2009. In 2022, it launched a campaign to promote organic products.
In 2010, a group for organic production was established within the Serbian Chamber of Trade and Industry.
The Serbian organic sector is also supported by the European Union and Germany. In 2024, GIZ will help farms convert to organic farming, as part of its green economy project. Serbia has a project of a biodistrict in Kolubara[2].

- In Switzerland, there are subsidies for conversion, for certification[3] and for investment. Conversion subsidies began to be paid by some cantons in 1989. Since 1994, it has been managed by a federal program.

Since 1996, almost all agricultural schools have offered courses on organic farming.
Bio Suisse is the umbrella organization for the organic sector. It was created in 1981. Its development goals are to reach 25% of the UAA and 15% of the food market by 2025 (strategy adopted in 2017). The government supports Bio Suisse financially to promote Swiss organic products. Bio Suisse has implemented a labelling system for restaurants with stars indicating the quantity of organic products used.
The Research Institute of Organic Agriculture, FIBL, was created in 1973. Its aims improving organic farming methods and advising farmers. It conducts research on soils, varieties, animal welfare and climate change. It has research and popularization activities aimed at developing countries. For many years, it has analysed the global organic agricultural sector. It released its twenty-fifth report on the global organic sector early 2024.
The Organic Farm Knowledge platform[4] was created to disseminate knowledge and exchange experiences between farmers, advisors and researchers in Europe. It is managed jointly by FIBL, IFOAM EU and ICROFS.

- In Turkey, the first organic association, ETO, was founded in 1992.

The development of the sector was supported from 1995 with the creation of the Ecological Agriculture Committee and the Ecological Agricultural National Steering Committee.
Research on organic farming began in 2002. Currently, the 47 research centres owned by the Ministry of Agriculture have organic activity.
There are also around ten training courses on organic farming.
The first law on organic agriculture was adopted in 2004 and the first organic regulations in 2005.
Turkey started paying subsidies to organic farmers in 2012. However, subsidies are only given after the first year of conversion.
Additional state subsidies are granted to farmers for the purchase of certified propagating material and organic fertilizer, for soil analysis, for working in ecologically fragile areas and for using agricultural advisors.

1- The first action plan began in 2018.
2- South-East of Belgrade
3- In two cantons
4- https://organic-farmknowledge.org/

Izmir Municipality helped farmers convert their farms to organic farming.

- In Ukraine, an organic law was adopted in 2019 and a national organic logo was created. However, it only appeared for the first time on a product in September 2023. In 2021, Ukraine has set itself the goals of achieving 3% of its UAA in organic by 2030, as well as $1 billion (i.e. over €880 million) in organic exports.
Before the war, some regions had budgets to provide organic certification assistance to producers. it was also planned that the State would pay subsidies to organic producers and create a national register of organic operators.
There are three organic associations working to develop the organic market, particularly internationally: Organic Ukraine, Organic Federation Ukraine and Organic Initiative.
Before the war, an organic fair was organized every year in September by the Organic Federation of Ukraine.
Before the war, organic farming was mainly studied at two universities: the Bila Tserkva National Agrarian University and the Zhytomyr National Agroecological University.
Since Russia's invasion of Ukraine began on February the 24th 2022, the biggest problem faced by organic producers has been the access to land. A significant share of organic agricultural land is located on the battlefield or occupied.
The Ministry of Agrarian Policy and Food of Ukraine cooperates with international projects aimed at the development of organic production and circulation of organic products in Ukraine, with Switzerland, Germany and the European Union.
Despite the war, around forty Ukrainian organic exporters participated in the 2024 edition of Biofach.

In North America

- Until a few years ago, US support for organic farming focused mainly on research, insurance schemes and partial coverage of certification costs.
Organic farmers can benefit from programs available for conventional agriculture in the Farm Bills, such as that aimed at promoting environmentally friendly practices and that regarding the development of farmers' markets.
The 2018 Farm Bill established permanent mandatory funding for the Organic Research and Extension Initiative (OREI). For 2023, the planned budget was €44.5 million.
In fall 2022, the USDA launched a support program for producers and processors wishing to go organic: the Organic Transition Initiative. Its overall budget is €281 million. This program consists of several measures, including:

  - assistance with certification costs: it has just been increased to 75% of costs within the limit of €703 per farm,
  - a training and technical assistance program with a regional network of organic experts,
  - marketing support for organic dairy products: it was created to help mitigate market volatility, rising input and transport costs, and instability in food supply and prices for animals that have created unique challenges in the organic dairy industry. Its budget is €98 million,
  - the organic market development support program: it will finance projects such as the launch of new organic products or equipment to process organic products.

In 2023, the Organic Center and the Foundation for Research in Agriculture and Agri-Food (FFAR) announced funding of nearly €2.2 million for organic awareness and research programs over two years, to help advance organic farming practices and deepen understanding of their impact on productivity and climate change mitigation. These funds will be awarded through two initiatives: the Organic Training for Agriculture Professionals Award and the Research Grants Program Award.
Training in organic farming is offered by several universities and by the Rodale Institute. The USDA launched an online organic learning centre that offers free training.
In 2020, the Organic Trade Association established the Organic Council to unify the diverse perspectives of the organic sector and address current challenges. This council allows, among other things, to share information within the sector and to think on regulatory issues.

- In Canada, the organic sector is supported at both the federal and provincial levels. At the federal level, the government has provided financial support to the Organic Agriculture Center of Canada at Dalhousie[1] University since 2009 to implement several research programs as part of the Organic Science Cluster. This supports thirty-seven Canadian research programs on production and processing.
In 2019, the Canadian government decided to invest €5.56 million in research on organic farming, nearly €196,000 in updating organic standards and nearly €680,000 in the development of the domestic market and export. In 2020, seventy-nine Canadian researchers were working on organic agriculture.
For over ten years, Canada has organized an organic week each September. A strategy for Canadian organic products was developed by public and private stakeholders, thanks to funding from the federal government. A program to help promote organic products for export has been set up.
Several Canadian universities offer training in organic farming.
The federal government wishes to develop employment in the Canadian organic sector.
The Department of Agriculture and Agri-Food Canada financially supports the Canadian Organic Growers association[2], which works to develop the Canadian organic sector.
At the provincial level, Quebec was the first to provide support for organic agriculture, starting in 1989. Funds were allocated to research and advice. The creation of organic organizations was supported by the Quebec government. In Quebec, there is a 200 ha research site dedicated to organic farming. Farms undergoing conversion received financial support from 2015 to 2023. The development plan for Quebec's organic sector runs from 2020 to 2025. The Quebec government financially supports the province's organic umbrella organization: Filière Biologique du Québec, which has existed since almost 20 years. Since 2018, its communications subsidiary, QuébecBio, has coordinated campaigns to promote organic foods in Quebec. As part of the biofood policy for 2020-2025, a new campaign to promote organic products has emerged. It includes television advertisements and a dedicated Facebook page.
In Manitoba, technical support is provided by a team from the Ministry of Agriculture.
In the Maritime Provinces, there is a network of organic businesses, the Atlantic Canada Organic Regional Network, which allows the exchange of practices and resources.

1- In New-Scotland
2- Support of €533 thousand in 2022.

The Atlantic Provinces, British Columbia and Saskatchewan all have supports in place to promote knowledge transfer regarding organic production methods and extension services.
The Yukon government offers training and study tours for organic producers and supports the Yukon Organic Producers Association.
Several provinces offer crop insurance with specific amounts for organic crops. It is in Saskatchewan that it is most successful.

In Asia

- In Asia, public support is more recent than in Europe. Many initiatives are taken to develop organic farming.

- Participatory guarantee systems for organic farming are very developed in Asia, mainly in India.

- IFOAM Asia organized its sixth congress in June 2023, in the Philippines. Emphasis was placed on peace and food security. New networks have been created: the Network of Young Elected Officials and the Education and Research Network for the Development of Organic Agriculture.
In 2024, IFOAM Asia plans to introduce an organic award, co-organize an international conference on school meals and public procurement and to host the global PGS conference.

- ALGOA[1] is a project initiated by IFOAM Asia and which brings together 204 members in around twenty Asian countries. This involves developing a territorial approach to organic farming. It organized its ninth summit in June 2023.

- The Asian Organic Agriculture Innovation Committee was launched in December 2019.

- In the Middle East, Saudi Arabia is the country where government support for organic farming is most developed. The Saudi Association for Organic Agriculture[2] was created in 2007. It provides technical and logistical support to organic producers. In 2009, a first organic regulatory framework was created. That same year, a research centre dedicated to organic farming was created. Its mission is also to advise and train organic farmers.
A national organic logo was launched in 2011.
The Ministry of the Environment regularly organizes workshops on organic farming for producers and preparers. It also financed and co-organized two information campaigns on organic farming aimed at the general public.
SOFA collaborates with the Ministry of Agriculture to promote organic products.
With its current program to support the organic sector, the Ministry of Agriculture hopes to triple organic production by 2030.

- In Armenia, organic farming is one of the priorities defined in the sustainable agriculture development strategy of the Ministry of Agriculture of Armenia.

1- Asian Local Governments of Organic Agriculture
2- SOFA

The NGO Shen has been promoting organic production methods in Armenia since the early 2000s. There is also an organic federation, Organic Armenia. It supports the marketing of Armenian organic products and promotes them.
A network of organic farming advisors has been set up.
The National Agrarian University has a laboratory dedicated to organic agriculture, as well as an organic course.

■ In Azerbaijan, a strategic roadmap for the national economy[1] was approved by the president in December 2016 and specifically includes the development of organic farming.
GABA is an NGO created in 2000 and whose mission is to promote organic agriculture. It informs farmers, notably through its monthly magazine. It also provides training. Since its creation, over 2,000 farmers have been trained in organic farming methods. It has been organizing organic events since 2005.
For several years, FAO has been working on the development of organic farming in Azerbaijan.
It is planned to create pilot organic farms in all regions.
GABA has prepared a national program on organic farming, but it has not yet been adopted by the government.

■ In 2012, Bhutan was the first country in the world to declare its desire to become completely organic. Policy support for organic farming began in 2003. Early 2011, the National Organic Agriculture Program oversaw the development of a comprehensive range of policies and guidelines to support organic agriculture. Many farmers, as well as over 250 people from the Ministry of Agriculture, have been trained in organic farming. Bhutan is, however, still far from being completely organic, the share of UAA was still less than 2% in 2022. However, the goal behind this ambition of a 100% organic country is to promote organic farming in Bhutan to contribute to the marketing of smallholder agricultural products, poverty reduction and value creation for the tourism sector.
The most recent development program was completed in 2023. Several organic villages serve as models and are supported by the State.
Research on organic farming is growing in Bhutan.

■ The Cambodian Organic Agriculture Association, CORAA, is a national non-profit organization that works to promote organic farming in Cambodia. It brings together organizations and individuals who are active in organic farming, processing, marketing, trade and all types of support for organic farming.
The Cambodian government published a roadmap to promote organic farming in 2018. In 2020, it launched a program to support organic farming.
The FAO created PGSs in Cambodia to help small organic producers.
The United Nations World Food Programme and the Cambodian Agriculture Cooperative Corporation have launched a program to support Cambodian small farms. Its aim is to improve the resilience and livelihoods of small farmers through organic farming and better market access. It also aims to promote the improvement of local diets and gender equality.

■ In China, the federal government declared in 2017 that green development was one of the pillars of its development strategy. China wishes to become the world

1- In 2020, over a million people worked in agriculture, i.e. 40% of the active population.

leader in sustainable development and aims to become completely carbon neutral by 2060. The federal government has planned to develop training in organic farming. It also strengthened the audit of certification bodies.

Organic farming is also supported by provincial governments as a means to improve food quality and safety, which are major public issues in China.
There is a wide range of support for organic producers: certification assistance, support for finding land, financing of infrastructure and organic fertilizers, training and marketing assistance.
There is a network of 150 organic demonstration farms.
Lingqiu County in Shanxi Province, in northern China, has strongly developed its organic production.

- South Korea has been providing subsidies to organic farmers since 1999. It plans to develop research in organic agriculture through the creation of research centres spread across the country. Their roles will include developing organic agricultural techniques, training farmers, educating consumers and setting up demonstration farms.

South Korea promotes organic farming in the fight against climate change.
A day dedicated to organic farming takes place every year early June.
Goesan County has the greatest concentration of organic farmers. Organic agriculture has been strongly integrated into the politics of this county.

- In the United Arab Emirates, the government has set up a program to support the local marketing of organic products.

- In India[1], the federal government and many states support the development of organic farming. The federal support began in 2002 with the launch of its national program for the development of organic agriculture. The goal was then to develop organic production for export. Various actions were then carried out to promote the conversion of small farms and the development of the domestic market, such as the official recognition of participatory guarantee systems and the launch of a national PGS or the creation of the national organic logo, Jaivik Bharat. The federal government financially supports the development of participatory guarantee systems. It launched an online platform to help small organic producers sell directly to consumers.

A campaign called Jeevani took place in 2020 and 2021 to promote organic farming. The goals were to increase the general public's knowledge of organic products, especially in schools.
The Ministry of Agriculture and some state governments have opened shops to sell organic products. Furthermore, since 2004, a network of thirteen research centres located in several states have been working on organic farming.

1- In India, over 40% of the working population works in the agricultural sector.

Most Indian agricultural universities offer training in organic farming. A university dedicated to organic farming should be established in Gujarat.
In 2003, the state government of Sikkim announced its desire to become completely organic. It estimated that this strategy could help preserve the ecosystem and the health of citizens while providing socio-economic benefits, including helping young people stay on their land and creating sustainable tourism. Sikkim became completely organic early 2016. 75,000 ha are grown organically. Sikkim earned first prize in the IFOAM Future Policy Award. Additionally, an organic farming research and training institute was established in 2016 in the capital, Gangtok.
The Kerala government has launched an organic agriculture development plan aimed at promoting the adoption of organic farming practices to fight against climate change. This plan includes technical support for farmers, the exploration of potential markets for organic products, the integration of organic farming into school curricula and the creation of seed banks.
The Kasargode district of Kerala has also gone completely organic. Other Indian states have ambitious goals for organic farming development. Uttarakhand and Mizoram also have plans to become organic states.
Gujarat promotes organic farming through school textbooks.
Organic farming is also strongly supported in Andhra Pradesh.
States like Punjab have not launched any dedicated organic farming program but have supported organic farmers by purchasing their crops through structures such as the Punjab Agri Export Corporation and selling them abroad.
The Rajasthan government has decided to provide subsidies to organic farmers and to set up two organic markets.

- In Indonesia, the central government actively supports the Thousand Organic Villages project, the goals of which are to reach a thousand organic villages in the north of the country by 2019 and a thousand more by 2024.

The Tani Organik Merapi organic network was created in 2008. It supports the conversion to organic farming by guaranteeing outlets for producers. It also has a training activity.
In 2009, the province of Bali implemented a strategy to gradually replace chemical fertilizers with organic ones. Technical assistance is also offered to organic farmers. Other provinces have begun to support the use of organic fertilizers[1].
A participatory guarantee system was created in 2023. Over 700 organic farmers have already committed to this system.

- In Iraq, the Ministry of Agriculture is developing organic projects in different regions.

- IOA is the Iranian organic association. It supports sector professionals in the development of organic farming in Iran.

With the support of the IOA, the Ministry of Agriculture supports the development of organic medicinal crops in vulnerable regions of the country.
In 2023, an organic pavilion was created for the Iranian agricultural fair.
The thirteenth Iranian organic festival took place in December 2023 in Tehran.

1- Thailand, Sri Lanka, China, Bhutan, Nepal, South Korea and Taiwan have also implemented programs to favor the use of organic fertilizers.

- In Israel, IBOAA was created in the 1970s by a farmer. Today it has around five hundred members. It promotes organic farming and is involved in a large number of educational and humanitarian projects. This association works with the government.

- In Japan, the first organic farming development program dates from 2007.
As part of its Strategy for a Green Food System, the Japanese Ministry of Agriculture seeks in particular to develop organic farming. The goal is to reach 25% of UAA grown organically by 2050, i.e. one million hectares. To achieve this, the Ministry of Agriculture is planning a system of subsidies allocated to regions at the forefront of the organic sector, which support cooperation projects between producers, distributors and researchers on organic farming. The Ministry of Agriculture of Japan has established a platform to support local governments in promoting organic agriculture.
The Ministry of Agriculture participates in the creation of organic villages. The goal is to involve 200 municipalities by 2030[1].
It supports the purchase of organic products for school catering and the creation of organic sections in stores.
The city of Kisarazu has declared itself the first organic city in Japan. A ten-year plan has been launched to develop organic production in the municipality.
Since 2016, a national organic festival has taken place every year with organic producers, catering and crafts.
Rakuten Farm, a subsidiary of the online distributor, has entered into a partnership with Yamaguchi Prefecture to promote organic farming and the use of abandoned fields.
In 2023, a consortium on Japanese organic products was created by organic processors and distributors. The goal is to promote the organic processing of Japanese products.
In June 2023, a group of thirty parliamentarians launched a league to support the introduction of organic products in school canteens.

- In Jordan, the second organic sector development program was completed in 2022. The main goal was to convert farms to organic. Several training courses in organic farming have been launched.

- In Kazakhstan, a law on organic agriculture signed by the President in 2022 defines the institutional and regulatory framework for the production of organic food.
Organic production is a development priority for Kazakhstan as part of its Green Economy initiative which emphasizes the efficient use of water, land and biological diversity.
There was a roadmap for the development of organic agriculture for 2022 and 2023.
QOPUnion represents organic producers in Kazakhstan. There is also a federation of organic movements: KAZFOAM.
The accreditation of the first organic certification company (Rosorganic) was announced in mid-2022. This company has started issuing certificates for organic products intended for the domestic market.

1- Compared to 91 late 2023

■ Kyrgyzstan has decided to support the organic sector to develop exports of organic products. It plans to completely convert its agriculture to organic by 2028. A national organic logo has been created.
A new law on organic production was adopted in March 2023. Its goals are to regulate organic production, to create favourable conditions for the development and dissemination of organic production, to ensure the safety of organic products for consumers, improve competitiveness and develop exports of organic products.
A national program to encourage organic production in the Kyrgyz Republic until 2027 is being prepared.
The Organic Development Federation, Bio-Kg, was created in 2012. It especially organizes organic forums and fairs.

■ In Kuwait, the Public Authority for Agricultural Policies and Fisheries Resources wishes to develop organic production.

■ The Laotian government created an organization in 2009 that offers low-cost certification. In the capital, the Ministry of Agriculture supports an organic market which was created in 2006. It has become daily. As in Cambodia, FAO has created PGSs in Laos.

■ In Lebanon, support for organic agriculture began in the early 2000s. Two research stations dedicated to organic agriculture were created in 2014 and 2017. MECTAT[1] and Greenline are two organizations working to create a network of organic farmers and traders and the promotion of organic food in Lebanon, through the training of farmers and the education of consumers.

■ In Malaysia, the government has established a free national certification program: MY Organic. NGOs such as CETDEM organize organic events for interested farmers. They also conduct a business and consumer education and awareness program.
Organic Alliance Malaysia was established to facilitate sectoral cooperation and development of organic agriculture in the country.
The Penang Consumers Association installs organic vegetable gardens in schools to familiarize students with organic farming.

■ Mongolia has twenty-three participatory guarantee systems.
Mongolia has set itself the goal of achieving 5% of its agricultural production grown organically by 2030, compared to less than 1% in 2023.

■ In Myanmar, an organic farming training program was launched in 2010. The Organic Farmers Association, MOPGA[2], was created in 2013. This association and the MFVP[3] offer various services to organic producers including training and certification. These two organizations communicate little information on organic farming to the general public.

1- Middle East Center for the Transfer of Appropriate Technology
2- Myanmar Organic Growth Production Association
3- Myanmar Fruits, Vegetables, Production and Export Association

- In Nepal, support for organic farming began in 2004. Technical support for farmers started in 2015.

- In Uzbekistan, subsidies for organic production are planned. A register of organic producers is kept up to date and available on the website of the Ministry of Agriculture.

- In Pakistan, the International Center for Agriculture and Biosciences is currently developing the first draft of a policy for the development of organic agriculture.
The promotion of organic agriculture is carried out by several state organizations. Several non-governmental organizations and private entities are contributing significantly to the promotion of organic agriculture in Pakistan.

- The first action plan for the development of organic agriculture in the Philippines was launched in 2012. The government has been providing certification subsidies to organic operators since 2012. A fund to help organic farmers develop organic production and responding to the development of the local market has recently been created.
Since 2010, Benguet University has offered organic training. It was followed by other universities.
Since 2013, the government has supported the installation of forty-nine shops where it is possible to purchase both organic inputs and organic food products.
Over 120 mayors are involved in the development of organic agriculture (i.e. 8% of municipalities). They have been organized in a league of Philippine municipalities and cities for organic agriculture since 2012. This organization notably offers free four-week training on organic agriculture for family farms and municipalities.
For fourteen years, an Organic Farmers Festival has been organized on the Island of Negros in the Visayas region, with the support of the local government.
An undersecretary for organic agriculture was appointed in 2019.
In 2020, the Philippine government recognized certification under PGS. There are currently twelve.

- The government of Sri Lanka tried to convert its entire territory to organic very quickly, while the transition was initially supposed to take ten years. This project failed.
Recently a participatory guarantee system was launched to develop organically grown areas.

- The Taiwan Council of Agriculture plans to triple the areas grown organically. Training programs in organic farming and advisory services have been set up.
In 2023, three organic farming promotion zones were created, covering approximately 219 hectares. Organic producers in these areas receive additional subsidies.
The first research centre dedicated to organic agriculture was created in 2023.
In 2023, most of local governments have established food and agricultural education promotion committees to launch organic farming education initiatives in schools, kindergartens and supermarkets, in order to encourage the consumption of organic products.

- In Tajikistan, NGOs are raising farmers' awareness of the benefits of organic farming.

- In Thailand, the last national organic plan was completed in 2022. A new one is in preparation for the period 2023-2027. The government particularly supports the development of organic rice production (for export). It is also involved in the development of participatory guarantee systems and encourages the introduction of organic products in canteens and restaurants.
In 2022, a communication strategy on the advantages of organic products was developed with the EU support.
Maejo University has converted its plots to organic farming and created an organic centre where students and employees can purchase organic products.
The Thai Organic Consumers Association wishes to develop organic tourism on the island of Phuket.

- In Vietnam, there is an organic agriculture development project for 2020 to 2030 in order to advance national production, as well as organic aquaculture. The goals are to achieve 2.5 to 3% of organic UAA, 2% of livestock products and 1.5% of aquaculture production. The project also aims to improve organic yields, diversify organic production, develop certification bodies and increase processing.
A program is underway to develop Ho Chi Minh City's supply of organic vegetables.
Hanoi wishes to expand the practice of organic agriculture on its territory. Several farms in the capital already produce organic vegetables. One of them supplies schools.
The Department of Agriculture and Rural Development of Lam Dong Province is implementing an organic agriculture development project over the period 2020-2025 to convert approximately 1,600 ha to organic.
The Vietnamese Association for Organic Agriculture[1] provides training to producers. In September 2023, it organized the fourth Vietnam Organic Day to promote the growth of organic agriculture, in partnership with the Ho Chi Minh City Municipality.

In Latin America

- The Inter-American Commission for Organic Agriculture, CIAO, was created in 2008. It gathers nineteen American countries. Spain and Portugal are also part of the CIAO as permanent observer members. The CIAO has four strategic areas of action: facilitating trade and market development of organic products, strengthening national control systems, promoting organic production and disseminating information and knowledge on organic agriculture.
In 2016, it developed a plan for organic agriculture by 2030 in cooperation with the various member countries. The goal is to give new and strong impetus to the development of organic agriculture, for sustainable and inclusive growth conducive to the economies of member countries.
In 2021, the Inter-American Institute for Cooperation in Agriculture (IICA) renewed its commitment to the CIAO until 2025. Thus, the two institutions will continue to develop technical cooperation missions in order to promote the development and regulation of organic farming in different countries.

1- VOAA

The CIAO has organized several inter-American conferences on organic agriculture. The most recent took place in October 2023, in the Dominican Republic.

- A new meeting on Biodynamics in Latin America was organized in Peru in December 2022[1]. It made it possible to exchange information and strengthen the network.

- In Latin America, state support is still relatively limited. It mainly focuses on the development of regulations on organic farming. Other supports are more recent and often only date from the beginning of the 21st century. Most often, these are more government programs or initiatives rather than a real policy of support for organic agriculture.

- Training in organic farming, especially at universities, has been set up in most Latin American countries.

- Participatory guarantee systems are also developing in Latin America, especially in Bolivia, Brazil and Peru. Nearly 17,800 organic producers were certified via PGS in Latin America in 2022. Brazil was the first country to recognize participatory guarantee systems as equivalent to certification by a certifying body. In 2022, over 8,900 Brazilian organic producers were certified organic by a participatory guarantee system.

- Several Latin American countries have created a national organic logo, including Argentina, Bolivia, Brazil, Chile, Ecuador, Mexico, Paraguay and Peru.

- Argentina's first national law on organic agriculture dates from 1999.

The Argentine Movement for Organic Production, MAPO, was created around twenty years ago. This is an NGO. Its goals are to promote organic production, to communicate the benefits of this production system and organic foods, to ensure the quality and transparency of organic markets and to be the spokesperson for the Argentine organic sector.
In Argentina, the Ministry of Agro-industry has supported research on organic agriculture since 2011. The agricultural research centre, INTA, works in particular on organic agriculture. The first university training on organic agriculture started at the beginning of the 21st century.
Organic Agriculture Week takes place every year in December to promote organic products to Argentinians.
There is an Advisory Commission on Organic Agriculture. It is chaired by the Ministry of Agriculture.
In 2021, the Ministry of Agriculture launched its strategic plan for organic agriculture by 2030. This plan was designed with stakeholders in the organic sector. The goals are in particular to develop organic production and processing, to generate jobs, to stimulate research, to encourage private investment, to promote the structuring and organization of the organic sector, to strengthen the presence of production organic in institutional frameworks and to develop exports and the domestic market.
In 2023, the national program to promote organic production and processing was approved by the Senate. It will last ten years. Subsidies to businesses are provided in the form of tax credits.

1- The first took place in July 2017.

The Ministry of Agriculture organizes training webinars on organic farming.
The Ministry of Agriculture of Argentina created the Argentina Organic Awards.

- In Belize, Pro-Organic Belize is the organization in charge of the development and promotion of organic agriculture. It created a PGS. It also manages a basket subscription system.

An organic fair is held every year in the fall in Belmopan.

- In Bolivia, an organic production development program was launched in 2014.

There is a National Council for Organic Production.
Every 21st November, the Ministry of Agriculture organizes a national organic products day to promote them. An organic fair is being held in the capital.

- In Brazil, an organic week has been organized every year in June since 2005.

In 2012, the federal government launched a national program to promote agroecology and organic farming practices.
The website of the Ministry of Agriculture hosts the national directory of organic producers.
In Paraná[1], the costs of certification of organic products are covered by the State. In Santa Catarina, the marketing of organic products is supported by the government.
A federal campaign to promote organic products to the general public is organized each year.
Since 2009, the national program for school canteens has set the goal of using at least 30% of products from family farms, favouring organic products. It made it possible to develop conversions and democratize access to organic products. By mid-2019, 41 million students benefited from this program.
In 2016, the municipality of Sao Paulo decided that, by 2026, meals served in schools should be completely organic[2].
In Paraná, a 2020 law provides for the increasing incorporation of organic products in school canteens (primary and secondary education) to reach 100% in 2030. In 2021, the share of organic rose to 18.4%.
Organis is an organization that represents the interests of the Brazilian organic sector. It brings together producers, processors, cooperatives, associations and entrepreneurs in an institutional effort to promote Brazilian production, identify commercial opportunities on the global market and encourage the consumption of organic products in Brazil. The Instituto Brasil Orgânico was created in October 2019 with the main purpose of representing, promoting, protecting and encouraging the Brazilian organic movement.

- The Chilean association of organic producers Tierra Viva, Agricultores Organicos was created about twenty years ago. This is a PGS accredited by the Chilean state since 2008. Its goal is to organize organic farmers to meet local demand and supply local markets.

A strategic plan has been put in place for the Chilean organic sector for the period 2010-2020.
There is a technology transfer group on organic arboriculture.
In 2020, a first completely organic cooperative, Organicoop, was created. A significant part of its profits must be allocated to research and development.

1- Paraná and Santa Catarina are two states in southern Brazil.
2- Two million meals are served in this town each year.

In 2021, Chilean organic wine growers formed an association to promote organic wine.

- In Colombia, there is no national development strategy nor promotion of organic farming.

- In Costa Rica, a public control body certifies organic producers free of charge, however, the number of inspectors is limited. Conversion subsidies have been paid to organic farmers since 2007.
In 2018, an organic agriculture department was created within the Ministry of Agriculture.
The ANAO is the national association of organic agriculture. It promotes organic farming in Costa Rica. It is also involved in training.
The Ministry of Agriculture and the association of organic producers have developed an application to facilitate communication between sellers and buyers of organic products.
Organic food products have been exempted from VAT.
A Master's degree in organic farming has been created.
In 2021 and 2022, a partnership between the Ministry of Agriculture and the Caribbean Women's Trade Chamber enabled the training of a group of 200 women in organic production.

- The Cuban government began supporting organic farming in the 1990s. Research in the organic sector is relatively developed there.
The University of Havana implemented an organic curriculum at the same time.

- In 2023, Agrocalidad Ecuador[1] organized its sixth international congress on organic farming. It also organizes training on organic farming for producers. This organization has set up a national competition to highlight the efforts and commitments of organic farmers and processors. An organic sector fair was organized in 2023.
Actions are being taken to establish Santa Elena as the first organic district in Ecuador.

- In Guatemala, a National Strategy for the development of organic and agroecological production took place from 2013 to 2023. It aimed in particular to develop organic production.
In 2021, the Ministry of Agriculture organized a webinar on organic farming.

- In Haiti, FAO trained an association of 120 farmers to grow good quality organic seeds for their own use.

- The Jamaica Organic Agriculture Movement (JOAM) was established in 2001, with the mission of developing a sustainable and economically viable organic sector. It is an NGO run by volunteers. JOAM organizes training. It also contributed to the establishment of eight organic demonstration farms.

- In Mexico, state support is provided, especially for training, technical assistance and certification. Organic agriculture development plans have also been implemented

1- Agency for the regulation and control of phytosanitary and zoosanitary products

in some states (like Zacatecas, Chiapas, Oaxaca and Mexico City). SAGARPA, the national authority for the organic sector, is trying to develop the domestic market.
The National Council for Organic Agriculture (CNPO) is a consultation space which advises the various federal authorities on organic farming. Its role is also to work for the development and promotion of organic agriculture.
A professional fair dedicated to organic, Exporganánica, is organized every year.

- In 2011, Nicaragua was the first Central American country to enact a law to promote organic production.

- Since 2017, Panama has benefited from a public certification system.

- In Paraguay, a national organic agriculture development program was launched in 2010.
There is a technical committee to promote organic production coordinated by the Ministry of Agriculture.
In 2022, the Ministry of Agriculture launched a program to promote organic farming among producers.
An organic technical day was organized in 2022. It gathered 200 participants.

- In Peru, most of the organic sector development has been carried out by the private sector.
In 2008, the Law for the Promotion and Promotion of Organic/Ecological Agriculture was approved. In 2011, by mandate of this law, the National Council for Organic Agriculture (CONAPO) was created, as well as twenty-three regional councils for organic production.
The Ministry of Agriculture has launched an organic agriculture development program for 2021 to 2030. One of the goals is to promote organic farming among producers.
Every year, an organic seminar is organized during Expoalimentaria, an important agricultural fair. Organic products are also presented.
The regional government of Piura has provided financial support to organic banana producers since 2015.
Peru launched the first Latin American diploma in biodynamics in 2018.
RAE Perú promotes organic products to Peruvian consumers.

- In the Dominican Republic, there is a National Council for Organic Agriculture.

- In Uruguay, since May 2022, a decree defines production organic and ecological.
A national organic logo should be created.

In Oceania

- In Australia, there is little direct support to the sector. There is federal support dedicated to organic research and development.
A national logo for organic products was recently launched. It is now recognized by over half of Australians.
The 7th Australians Organic Products Promotion Week took place in September 2020.
An organic farming research centre was recently established at Southern Cross University. Since 2020, this university has offered a Certificate of Higher Studies in

Organic Foods and Nutrition, as part of its new National Center for Naturopathic Medicine.
Australian Organic[1] is a not-for-profit organization that protects and promotes the Australian organic industry. It has established a strategic plan for the organic sector for the period 2019-2023. The goals were to promote certified organic products, protect consumer rights and the integrity of the sector, and identify and answer to the needs of organic production and processing.
In September 2020, Tasmania's Minister for Primary Industries and Water announced a new program to stimulate the growth of organic production there.

- In New Zealand, there are several organic associations which are complementary: the Organics Aotearoa New Zealand, the Organic Exporters Association of New Zealand and the Soil and Health Association of New Zealand.

- POETCom, the Oceanian Community for Organic Agriculture and Ethical Trade, was created in 2012. It organizes training in organic agriculture. It plays an important role in the development of participatory guarantee systems for organic agriculture in Oceania[2]. POETCom has set itself as a priority project for 2020 to improve the provision of knowledge on organic agriculture to farmers.
An organic logo recognized by 22 Pacific countries and territories has been created: Organic Pasifika. An organic farming toolkit has been put online to help decision makers.
An organic learning farm network is being created to encourage knowledge sharing.

- The University of the South Pacific, located in Fiji, offers training in organic farming.
Cicia Island, in Fiji, has become completely organic since 2014.

- The governments of Samoa and Niue provide certification subsidies to organic producers.

- The PROTEGE project (Oceanian regional territorial project for sustainable ecosystem management) is implemented in the French Pacific territories. It is funded by the European Union and aims to strengthen sustainability, adaptation to climate change and the autonomy of key sectors and to improve ecosystem services by protecting water resources and biodiversity. Agroecology and organic farming constitute the agricultural basis of this program.

- Participatory guarantee systems are developing in Oceania. The rate of growth of this kind of certification is faster than that of traditional certification (third-party certification). According to POETCom, twelve participatory guarantee systems were fully operational in 2018 in Fiji, Vanuatu, French Polynesia, Cook Islands, Solomon Islands, New Caledonia and Samoa and another was under development in Kiribati. These twelve PGSs had over 2,000 certified organic producers and over 1,000 in conversion.

1- Formerly Organic Farmers of Australia. The name change took place in 2012.
2- The first Oceanian PGS was created in New Caledonia in 2010.

In Africa

- In 2011, the heads of state and governments of the African Union took the decision to promote organic farming on the African continent. The African Union Commission trained 90 producers and exporters in Africa. A strategic plan to develop and promote organic farming has been developed for the period 2015-2025.

- The Ecological Organic Agriculture Initiative (EOAI) was launched in response to the call from African Union Heads of State and Government to promote organic farming in Africa. Its overall goal is to integrate organic agriculture into national agricultural systems by 2025, in order to improve the quality of life of all African citizens. It is implemented in nine countries[1].

- AfrONet (African Organic Network) is the umbrella organization for the organic sector in Africa. It was created in 2012. Its role is to strengthen and support organic networks in Africa and to promote organic farming practices. It created movements for organic farming in African countries. It has already created some in twenty-seven countries.
AfrONet regularly organizes a conference on organic farming. The fifth conference took place in December 2023 in Rwanda. It brought together 180 people in person and 120 online. The theme of this conference was "Strengthening resilient and sustainable food systems in Africa through organic agriculture".

- The IIABA project, funded by the French Development Agency, took place from late 2019 to late 2023 in three countries: Uganda, Morocco and Tanzania. In particular, it made it possible to identify institutional innovations to develop organic farming in these countries, to strengthen the capacities of AfrONet and its member organizations and to disseminate targeted institutional innovations to partner countries and within AfrONet. As part of IIABA, three digital platforms for the sale of organic products have been created.

- The seventh West African conference on organic farming will take place in Senegal in 2024 and the eighth is planned in Togo in 2026.

- There is also a research network in organic agriculture: NOARA. It was launched in 2009. Late 2023, it had over 400 members spread across 29 countries. Its roles are in particular to direct research in organic farming, to carry out scientific popularization, to carry out market research, to have a lobbying role in favour of research dedicated to organic farming, to promote organic farming in Africa and to provide advice to programs and partners in the field of organic agriculture research. NOARA has embarked on the development of a ten-year demand-driven research program on organic farming for Africa.

- Over the last decade, participatory guarantee systems have developed significantly in Africa, particularly in Uganda, Tanzania, Kenya and Burkina Faso. In total, over 7,700 producers were certified via PGS in 2022.

1- Benin, Ethiopia, Kenya, Mali, Nigeria, Uganda, Senegal, Tanzania and Zambia

- In October 2020, the Algerian Minister of Agriculture and Rural Development announced the creation of a body to promote products from organic agriculture across the country.
An organic agriculture department has been created within the Ministry of Agriculture.

- Since 2014, Benin has had a platform for organic and ecological agriculture: PABE Benin. It especially organizes training for farmers.
There is also a Beninese organization for the promotion of organic agriculture: OBEBAP. This NGO works for sustainable development by emphasizing the valorisation of local resources and the development of sustainable agricultural production systems, the preservation of the health of producers and consumers and the protection of the environment.

- In Burkina Faso, organic farming has been developing for about thirty years. Burkina Faso is one of the most active countries in this field in West Africa. It is professionals, sometimes helped by NGOs[1], who have enabled the development of organic agriculture. There is no state subsidy for organic farmers.
CNABio, National Council for Organic Agriculture, is an association created in 2011 which ensures the promotion and development of organic agriculture. It gathers sixty-five members (associations, farmer organizations, NGOs, businesses, farmers, researchers, etc.). Organic training, especially in vegetables production, is organized by CNABio. It visits and advises his members. It also engages in advocacy and lobbying with the authorities. To remedy the problem of the high cost of international certifications, CNABio has set up the Burkinabè organic standard and a certification guide. It has developed a participatory guarantee system to certify products intended for the local market.
It is only over the last decade that organic research and training have developed.
Some events are organized to promote organic products and raise awareness among the population; however, they are organized irregularly and are insufficient to provide real knowledge of organic products to consumers.

- In Burundi, there is no national organic agriculture development program. It is possible to find organic products at fairs. There is no specifically organic event organized.
The Burundi Organic Agricultural Movement (BOAM) was created in 2011. It promotes organic agriculture in the country. It has twenty-five members.

- In Cameroon, ASPABIC[2] was created in 1997. This association began by carrying out work to popularize organic agriculture on a local radio. It continues to promote organic farming. It also provides technical support for the creation and monitoring of its members' organic plots. It also connects organic producers. At the start of 2020, ASPABIC had twenty-three active members.
In 2023, the Cameroonian Minister of Agriculture announced the establishment of an agroecological transition desk in the cocoa sector, with the EU assistance. It will aim to reduce the use of pesticides and promote organic farming.

1- An NGO provides subsidies to producers undergoing conversion.
2- Association for the Promotion of Organic Agriculture in Cameroon

- In Egypt, a research centre specific to organic agriculture has been created. Three universities in Cairo offer training programs on organic farming.
The German Ministry of Economic Cooperation and Development is funding a project to increase the competitiveness of organic producers and processors in Egypt. This includes training and technical support for organic farmers and the promotion of organic products.
The Minister of Agriculture announced a plan to reduce the use of pesticides by 50% by 2030.
AfrONet initiated the creation of a national movement for organic agriculture.

- In 2019, the government announced its ambition for Mauritius to become organic.
The Institute of Food and Agriculture Research and Extension has a department dedicated to organic farming.

- In Kenya, there has been an organic training centre since 1986.
The Kenya Organic Agriculture Network (KOAN) was established in 2005. This network gathers organic producers, exporters, traders, NGOs, and other organizations. KOAN coordinates the organic sector and promotes the social, economic and environmental benefits of organic agriculture. It helps organic producers find outlets and offers them training.
The Kenya Institute of Organic Farming (KIOF) is an NGO that provides training in organic farming.
Furthermore, Busia County supports the installation of an organic fertilizer production plant.

- In Liberia, there is no national policy to develop organic agriculture. There is also no event organized to promote it. However, discussions have begun between the various stakeholders to launch a development process.

- In Madagascar, SYMABIO has represented the organic sector since 2011. It gathers over sixty operators in the sector mainly focused on export.
Participatory Guarantee Systems have been set up around the capital Antananarivo with the support of international NGOs.
A first law on organic agriculture was adopted in July 2020, the result of two years of consultation between the private sector, the relevant Ministries (agriculture, environment, trade, health), agricultural organizations, NGOs, and health organizations. certification and research. This law reflects the strategic ambition of the Malagasy government to support the growth of organic exports, as well as to promote the development of its national organic market. The text contains commitments in favour of organic research, technical support, the promotion of organic territories in the country and measures to mitigate chemical contamination of organic value chains. The law established the framework for developing a national organic standard, for use by producers wishing to produce for the local market. This law recognizes PGS for marketing on the domestic market.
The national strategy for organic farming was launched in 2022. It is based on four axes: governance, support for development, communication and support for research.

- In Mali, there are occasional and seasonal subsidies for organic producers. The Ministry of Agriculture does not currently promote organic products. However, some

NGOs support organic producers. A small organic fair was created by the RESAPAC network: TRÈS ORGANICS.
The Malian organic movement, MOBIOM, was created in 2002. It gathers seventy-six organic producer cooperatives.

■ In Morocco, the first program to support organic research and training was launched in 1997. A program contract between the Ministry of Agriculture and AMABIO[1] took place from 2011 to 2020, in order to develop the sector Moroccan organic. It focused on research, training, technical assistance and marketing of organic products.
There is a Moroccan Network of Agroecological Initiatives (RIAM). Its main mission is to provide a space for meeting, information and sharing between agroecology stakeholders, promoting synergies between initiatives.
The new organic inter-professional association, Maroc Bio, was created in 2022.
Organic farming has a special place in Morocco's agricultural strategy for 2030. The goals are to reach 100,000 ha and a production of 1 million tons (a third of which is intended for the local market). Six levers for the sector have been identified: certify de facto organic crops, train producers, improve the accessibility of organic inputs, reduce certification costs, bring out national champions and create territorial bridges of excellence in organic cultivation. A dedicated research centre, CETABIO, will be created and will benefit from a committee of experts responsible for its governance. The strategy also aims to strengthen the promotion and marketing of Moroccan organic products, both on the domestic and export markets.
The National School of Agronomy has a course on organic farming. It also has a research activity. The Hassan Agronomic and Veterinary Institute also carries out research on organic farming and offers organic training.
In 2024, an international organic fair, SIMABIO, will be organized in Casablanca.

■ The Namibian Organic Association gathers a group of producers and consumers with the common desire to develop the organic sector in Namibia. The association promotes the efficient production of organic products through capacity building, training, education, extension and research. There is no national organic regulation in Namibia, but only private specifications set up by the NOA. The NOA manages a participatory guarantee system. It registered a trademark. NOA helps with the marketing of organic products locally and internationally. It serves as a spokesperson for the organic industry in Namibia and internationally. It also aims to create a spirit of cooperation between the different players in the organic industry. It also seeks to increase awareness of organic farming in Namibia.

■ In Niger, there is no national strategy for organic agriculture. On the other hand, a group of organic producers was formed in order to set up a PGS. For the moment, there are about thirty producers and the areas concerned remain quite limited. Furthermore, organic producers from Niamey have organized themselves into an economic group Bori, Bella, Bani[2]. Their first general assembly was held in 2020. Their main goal is to develop organic production around Niamey.

1- Former Moroccan organic federation
2- " Beautiful, Good, Organic "

■ In Nigeria, the organic sector is just beginning to develop. There is no subsidy yet for organic producers. An organic export development program has been launched. This program was notably designed to subsidize the training and certification of organic producers and processors.
The certification body Nicert organizes seminars to connect organic producers and processors with international buyers.
NOAN[1] is an NGO created to coordinate all stakeholders involved in organic agriculture in Nigeria. It also makes links with international players in the sector. It also organizes conferences on organic farming.

■ In the Republic of Congo, the Mayor of Pointe-Noire[2] launched a project in 2020 to develop organic vegetables production in the Mbota Bissongo district.

■ In the Democratic Republic of Congo, the Congolese Organic Agriculture Network is an NGO whose roles include promoting organic farming, representing the organic sector, facilitating the implementation of laws and regulations, providing advice techniques, coordinating all activities relating to organic certification, ensuring compliance with organic standards, attracting donors of funds and investments in the field of organic agriculture and participating in the implementation of public policies in favour of organic farming.

CEDAP[3] is a non-profit organization founded in 1995 and aims to contribute to socio-economic development, including the promotion of agriculture and organic practices and gender equality in the eastern regions of the Democratic Republic of Congo. Its mission is to help farmers and communities become the drivers of their own development by escaping poverty through organic farming and participatory projects.

■ The Rwanda Organic Agriculture Movement (ROAM) was created in 2007. It works to raise awareness among the population, share information within the sector, supports organic producers and advocates for the adoption of policies public support for organic farming. In 2019, it launched the Rwanda National Organic Agriculture Platform in partnership with the Ministry of Agriculture. Its role is to serve as a place for discussion for multiple stakeholders in the organic sector.

■ In May 2020, the Minister of Agriculture of Sao Tome and Principe signed a public-private partnership protocol entitled "Sao Tome and Principe 100% Organic" aimed

1- Association of Organic Agriculture Practitioners of Nigeria
2- South-West of the country
3- Center for Development and Promotional Support of the Democratic Republic of Congo

at guaranteeing the country's food and nutritional security through production of quality foods with high nutritional value for local and export markets. The main goals are to promote sustainable local food production, to promote the production, processing, marketing and consumption of organic products, to provide information on the economic, cultural and social importance of these products and to increase the exchange of experiences with other African countries.

- In Senegal, FENAB[1] was created in 2008. Its missions are to promote organic products, restore soil fertility and the balance of ecosystems, fight against the disappearance of biodiversity and climate change, preserve and improve, human, animal and plant health, encourage the emergence of organic farming professions (particularly among young people), promote the activities of small producers and strengthen their role.
There is no subsidy for organic producers.

- In South Africa, government commitment to organic farming is weak. There is no subsidy for organic producers. A national framework for organic farming has been under study for over 10 years. Unfortunately, it remains in the draft stage.
The South African Organic Sector Organization (SAOSO) works to unite the country's organic producers. In 2018, it published private specifications, recognized by IFOAM. South Africa also has many PGSs.
In 2020, Ecocert South Africa and USAID hosted a free webinar on organic farming.
In the townships of Cape Town, the Abalimi Bezikhaya association promotes organic farming in shared gardens. It has created two centres which serve as a demonstration garden, a supply location and a training centre.

- In Tanzania, TOAM (Tanzania Organic Agriculture Movement) was created in 2005. It is an NGO whose goals are to coordinate and promote the development of organic agriculture in Tanzania, through the implementation networking and dissemination of information. TOAM has one hundred and fifteen members: farmer associations and cooperatives, NGOs, organic producers, companies, distributors, researchers and trainers.
The Tanzanian government has developed a national strategy for organic agriculture. It was officially launched in November 2023, during the third national conference on organic agriculture. The goals are to develop organic production, sector productivity and consumption of organic products.
In March 2023, an association of organic cotton producers and ginners was created: Tanzania Organic Cotton Association.

- In Togo, ANA-Bio Togo is a non-profit association which defends the rights of organic operators and promotes the organic sector.
The Togolese Union for Organic Agriculture serves as an inter-professional association for Togolese organic agriculture.
Organic fairs and demonstration events of organic farming techniques are organized in Togo.

- Tunisia is the African country where government support for organic agriculture is the most important. In 1999, a technical centre for organic farming was created

1- National Federation of Organic Agriculture of Senegal

and certification subsidies began to be paid. The first organic agriculture development plan was launched in 2004.
Organic farming has been integrated into public further education for over a decade through the Technical Center for Organic Agriculture and the regional Agricultural Commissions. An organic farm school has been created.
There are subsidies on investments of up to 50%[1]. An annual bonus is also paid for five years as the State's contribution to the costs of control and certification of organic production up to 50%. The costs of analysis and testing of specific inputs are also supported at 50%.
Besides, organic farmers benefit from a suspension of customs duties and VAT on some inputs specific to organic farming.
In order to attract local or foreign investors to place their money in the Tunisian agricultural sector, the State completely exempts them from income taxes for ten years, then allows them to benefit from a 10% tax exemption.
In 2010, the government launched a week of Tunisian organic products.
UNObio, the organic union of farmers, processors and distributors was created in October 2019. It aims in particular to improve the national infrastructure for organic agriculture, by optimizing the roles of the different actors. In October 2020, UNObio signed a contract with the Swiss Embassy in Tunis, for the realization of a digital platform project for organic professionals in Tunisia. The two partners plan to subsequently develop a network of operators and a virtual market for organic products in addition to sharing experiences and know-how.
In 2022, the Ministry of Agriculture signed an agreement with the FAO to launch the Biorest project, which aims to support the development of sustainable and resilient organic agriculture in Tunisia in a context of climate change.
The fourteenth edition of the international organic agriculture and agri-food exhibition took place in Tunis in April 2024.

- In Uganda, the National Organic Agriculture Movement Uganda (NOGAMU) was established in 2001. This umbrella organization gathers producers, processors, exporters, NGOs and other institutions and organizations involved in the promotion and development of the organic sector in Uganda. In particular, it organizes organic events as part of the IIABA project.
There is no subsidy for Ugandan organic producers.
In 2020, the Minister of Agriculture launched a national policy for organic farming. The overall goal is to develop Ugandan organic production, ensuring that it is well regulated and contributes to the development of the country.

- The Zimbabwe Organic Producers and Promoters Association (ZOPPA) is a national movement for the development of the national organic agriculture sector in Zimbabwe. It was created in 2008.

1- It concerns equipment, tools and means specific to organic production.

Conclusion: SWOT analysis of the worldwide organic sector

		STRENGHTS	WEAKNESSES	OPPORTUNITIES	THREATS
Production	**Areas**	Increase in organic areas worldwide in 2022	Decrease in area in some European countries in 2022 and 2023	Development of PGS	
			Concerns about oversupply in Europe	Development of biodistricts outside Europe	
	Production means		Difficulties in making bank loans for farmers in a number of countries (not specific to the organic sector)	Development of the use of varieties and breeds of animals adapted to organic production	
			Lack of availability of high quality organic agricultural inputs in some countries (including seeds and plants)		
			Increase in energy prices linked to the war in Ukraine		
	Training/Education		Teaching of organic practices not developed in all countries [1]	Development of accessibility to information available online	
		Lots of organic training in the EU (especially post-baccalaureate level)		Development of organic training	
	Advisory	Support structures in many countries	Not sufficiently developed in some countries [2]		
	Certification		Certification costs often too high	Development of certification under PGS	
	Incomes	Increased income	Decrease of sales in some European countries	Fight against poverty	
				Greater development of fair trade in organic sectors	

1- On particular no organic training in a certain number of African countries, such as Liberia, Libya or Lesotho.
2- Particularly in the Republic of North Macedonia and Colombia.

	Structuration	Organic sector not sufficiently organized in many countries		Development of contractualization	
	GMO				New GMO
processing	**Processing means**		Few processing facilities in some countries	Development of processing facilities	
Distribution	**Sales channels**			Diversification of distribution channels	Further disruptions to supply chains due to geopolitical reasons
				Innovations in the distribution of organic products	
				Evolution of food distribution in many countries	
	Mass retailing	Development of the organic range	Difficulties finding some organic products in some countries		Price war
	Organic shops		Slowdown in some countries	New concepts	
	Online	More organic products online, in proportion, than in physical stores.	But often much less developed than for conventional products	Development beneficial to that of the organic market and its democratization.	
	Canteens and restaurants	Helps promote organic products to young people			Canteens and restaurants with organic only for the richest persons in some countries[1]
consumption	**Perception of organic products**	Good image	Image of an expensive, even luxurious product	Development of the promotion of organic products	
			Poor knowledge of organic products and organic agriculture in a number of countries	Explain more about why organic products are more expensive	
	Demand		Focused on North America and Europe	Demand not totally satisfied	

1- Organic products served in chic restaurants or intended for tourists in Georgia, Bangladesh and the Pacific Islands.

			More developed in cities	Development of demand outside North America and Europe	Different growth rates for supply and demand
			Growing interest in local products, often to the detriment of organic products [1]	Development of organic food crops alongside those intended for export	Shortage of some products in some countries
			Economic crisis		
			Mismatch between growth rate of demand and production	Development of the marketing of organic products thanks to tourism	
			Many other competing labels, notably in Europe and the USA		Increased competition from other labels
	Consumer purchasing power		Very high inflation, particularly in Europe in 2022 and 2023 and in the USA in 2022		Inflation that could continue and spread to other geographic areas
					Possibility of economic shocks caused by the Israeli-Palestinian and Russian-Ukrainian conflicts
	Demographic developments			Strong interest among younger generations (Y and Z) in organic products	
	Behavioural developments	Desire to buy healthy products accentuated by the pandemic	The price brake has progressed in some countries, especially in the EU		
		Growth of the food security criterion			
				Reducing waste (packaging and food)	
Regulation		Review and strengthening of organic regulations in some countries	Many different standards worldwide	Possibility that some regulations get closer	Negotiation of new trade agreements by the EU: threat to third countries
Public support	**General**	Benefits of organic products increasingly recognized by public authorities			
	Producers and processors	Support to conversion in some countries	Still insufficient, or even non-existent in some countries	Diversification of support	

1- Especially in Europe

			Giving up some environmental constraints because of the war	Current or upcoming sector support programs in many countries	The goal of 25% of UAA grown organically in the EU by 2030 is at high risk of not being achieved.
	Consumers	Promotion and education on organic products		Multiplication of communication tools	
	Research			Development of political support	
Organizations in charge of organic		Many NGOs and associations involved in the organic sector	Lack of coordination in some countries		

Glossary

African Union: It is an organization of African states created in 2002.

Arabica Coffee: It is grown on the plateaus (unlike Robusta which is grown in the plains). It is originally from East Africa.

Benelux: Originally an economic union between Belgium, the Netherlands and Luxembourg. The name Benelux is today often used generically to designate all of these three countries, whether geographically, culturally, cinematographically, economically, etc.

Bosnia and Herzegovina: It consists of three administrative entities: the Federation of Bosnia and Herzegovina, the Republic of Srpska and the Brčko District.

CIAO: Inter-American Commission for Organic Agriculture. It was created in 2008. Its members are nineteen American countries: Argentina, Brazil, Bolivia, Chile, Colombia, Costa Rica, Ecuador, USA, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Dominican Republic, Salvador, Uruguay and Venezuela. Canada has participated in assemblies as an observer. In 2017 and 2018, Spain and Portugal respectively joined the Commission as permanent observer members.

Cotton production campaign: It begins on the 1st of August.

Citrus greening disease: It is a fatal bacterial disease of citrus. It is widespread in Asia and Africa. The pathogen is transmitted by two insects of the *Psyllidae* family.

Coffee orange rust: A fungal disease originating in East Africa that has colonized all coffee growing regions of the world, except the Hawaiian Islands. It is caused by *Hemileia vastatrix*, a basidiomycete fungus.

Drive: This term generally refers to a collection point for goods or merchandise where the customer takes delivery of their items directly to their vehicle or nearby. First used for purchasing from fast food restaurants without leaving your car, it has also been used for several years to designate collection points offered by mass distribution chains which allow items to be delivered to the car. In this case, the order is placed in advance on the brand's website or from a mobile application on a smartphone and the customer chooses a time slot to pick up their purchases.

Equivalency Agreements: This type of trade agreement between two countries allows standards, rules and methods that differ between them to be treated as if they were the same (without each country having to change them), provided that they produce the same results and aim at the same goals, even if the means employed are different.

Eurasian Economic Union: Russia, Armenia, Belarus, Kazakhstan and Kyrgyzstan

Europe: European Union, Albania, Andorra, Armenia, Belarus, Bosnia Herzegovina, Georgia, Faroe Islands, Iceland, Kosovo, Liechtenstein, Moldova, Montenegro, Norway, Republic of North Macedonia, Monaco, Russia, San Marino, Serbia, Switzerland, Turkey, Ukraine and Vatican.

Farm Bill: This is US federal law approved by Congress. It sets agriculture and food programs and policy. It is updated approximately every five years. The Farm Bill is also known as the "Agriculture Improvement Act". it is updated approximately every five years. The most recent Farm Bill expired on the 30th of September 2023.

Farm to Fork Strategy: It was adopted in May 2020 by the European Commission. It aims to reduce, by 2030, synthetic pesticides and associated risks by 50%, chemical fertilizers by 20%, nutrient losses in nitrogen and phosphorus by at least 50% and the use of antibiotics. Another goal is to reach 25% of EU agricultural land grown organically by 2030. It is also planned to devote 10% to areas of high diversity.

Field crops: These include cereals, oilseeds, protein crops and pulses.

Fonio: This is a gluten-free cereal, native to tropical West Africa. This cereal is eaten in porridge or whole grains like rice, or in the form of couscous. It can also be used to make beer (tchapalo).

Fujian: Southeast Chinese region

Generation Y: Also called "Millennials", it gathers people born between 1980 and 2000.

Generation Z: Also called "new silent generation" or "generation C" for Communication, Collaboration, Connection and Creativity, it starts from the early 2000s until today. This generation has always known a world with a large presence of computers and the Internet.

GIZ: Deutsche Gesellschaft für Internationale Zusammenarbeit is the German international development cooperation agency. It has been created in 1963 and sits in Bonn.

Hubei: Southeast Chinese region

Kagoshima Prefecture: At the southern tip of the island of Kyūshū, Japan

Maritime provinces of Canada: New Brunswick, Nova Scotia and Prince Edward Island.

Middle East: It designates at least the following countries: Palestine, Jordan, Iraq, Israel, Syria, Turkey, Lebanon, Saudi Arabia, Yemen, Oman, United Arab Emirates, Qatar, Bahrain, Kuwait and Egypt. The Islamic Republic of Iran, Pakistan and Afghanistan are often added.

Milk quota system: This was a policy of rights to produce implemented in France, then in the EU, within the framework of the CAP, from 1984, to limit and stabilize milk production (milk from cow) which was then strongly in surplus, to counter the collapse of the price. Each year a milk production limit was set by Member State. This was then distributed among producers according to an organization specific to each country. This system was abolished in April 2015.

Minas Gerais: Brazilian state located in the north of the Sudeste region and with over 10% of the Brazilian population.

Miyazaki Prefecture: On the island of Kyūshū, Japan

Moringa: This is the *Moringa olifeira*, the most cultivated species of Moringa. It is originally from India and Sri Lanka. Its young pods and leaves are used as vegetables. The seeds are used as medicinal plants.

OREI: The Organic Agriculture Research and Extension Initiative helps solve critical problems in organic farming through research, education and extension activities and improve the competitiveness of organic and converting producers.

Organic Center: An independent, nonprofit American research and education organization, operating under the administrative auspices of the Organic Trade Association, with the mission of gathering credible, evidence-based scientific data regarding health and environmental impacts organic food and agriculture and communicate the results to the public.

Organic Trade Association: Trade association made up of over 9,500 organic US companies. Its missions are to promote and protect organic products. It is a member of IFOAM.

Permanent meadow: This is an herbaceous plant cover that has been established for at least ten years. It is characterized by a great wealth of spontaneous plant species in ecological balance under the joint effect of the environment and agricultural practices.

Perennial crops: Also called permanent crops. They stay in place for at least 2 consecutive years.

PGS: Participatory Guarantee Systems. These are locally oriented quality assurance systems. They certify farmers based on the active participation of the actors concerned and are built on a basis of trust, networks and knowledge exchange. They jointly choose a common set of standards for organic farming and a set of procedures and appoint a coordinating body.

Public collective catering: This includes nurseries, school, middle and high school canteens, universities, hospitals, government buildings, prisons and armies.

REKO: It means REttferdig KOnsum, or "fair consumption". It started in 2013 in Finland and then spread to other countries like Sweden and Norway. Local producers use Facebook groups to advertise which products are for sale and consumers can then order directly on Facebook. The aim is to free oneself from sales intermediaries while creating an efficient delivery system through which producers and consumers can meet. Consumers pay for their order directly at the delivery locations, which are generally located in the city centre for easy access. Delivery points are strategically chosen so that there are no rental costs. Some supermarkets even offer to host a REKO for free to attract more customers. The products are seasonal, locally produced and sold at reduced prices as there are no costs for packaging, transport, advertising, or sales intermediaries. Contact with consumers allows producers to have feedback on the products and their methods. There is no waste for the farmer because only the ordered products are harvested.

Retailer brands: Also called private labels. They are popular with consumers because they generally have lower prices than other brands. They also allow distributors to collect more margin. According to *LSA*, private labels allow you to differentiate yourself, to convey the values of the brand, to build customer loyalty and to have an accessible offer.

Shizuoka Prefecture: On the island of Honshū, the main island of Japan

Sikkim: State in the North-East of India, very mountainous and with little agricultural land. State in the North-East of India, very mountainous and with little agricultural land.

TAIEX: Technical Assistance and Information Exchange instrument of the European Commission

The United Nations World Food Programme: It is the world's leading humanitarian organization fighting hunger, providing food assistance in emergencies and working with communities to improve nutrition and build resilience. It uses food assistance to provide a path to peace, stability and prosperity for those recovering from conflict, disaster or the effects of climate change.

Third country/ies: Country/ies outside the European Union

TRACES: Trade Control and Expert System. Online management tool from the European Commission which centralizes all health requirements and tracks the movements of animals and embryos, as well as foodstuffs, sold or imported into the European Union. The TRACES system was established by Commission Decision 2004/292/EC in application of Council Directive 90/425/EEC.

Turkish organic bazaars: They are supported and managed by NGOs or municipalities but controlled by the regional departments of the Ministry of Agriculture of Turkey.

UAA: The Utilized Agricultural Area is a statistical concept intended to assess the area devoted to agricultural production. It is made up of arable land (field crops, market gardening, artificial meadows, fallow land, etc.), areas still in grass (permanent meadows, mountain pastures) and perennial crops (vines, orchards, etc.). It does not include woods and forests.

Uji: In Kyoto Prefecture, on the island of Honshū

United Arab Emirates: Federal state made up of seven emirates: Abu Dhabi, Ajman, Sharjah, Dubai, Fujairah, Ras el Khaimah and Umm al-Quwain. Its capital is the city of Abu Dhabi.

USAID: United States Agency for International Development. It is responsible for economic development and humanitarian assistance around the world.

USDA: United States Department of Agriculture. It is responsible for designing and implementing federal policy on agriculture, food and forestry. It is the equivalent of a Ministry of Agriculture.

Varroa: This mite parasitizes bees and is one of the possible or contributing causes of honeybee colony collapse syndrome.

Whole Foods Market: Main US organic chain. It was created in 1980 and bought by Amazon in 2017. It is the chain with the largest organic range.

Yunnan: Southwest Chinese region

Zhejiang: Southeast China region

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