2026
Edition

ORGANIC SECTOR IN THE EUROPEAN UNION

International publications by Agence BIO
2026 Edition

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Introduction

With this new edition of the Organic Sector in the European Union, Agence BIO furthers its mission of enhancing and sharing knowledge on the organic sector.

This publication presents a comprehensive overview of the EU organic sector, encompassing all its dimensions: regulatory framework, development policies, production, markets and trade.
It provides a comparative and well-documented assessment of the trends in the Member States, intended to support collective reflection and to guide both policymakers and practitioners.

In a context marked by the climate emergency, the accelerated loss of biodiversity and growing questions about the sustainability of our food systems, organic farming emerges as a central topic. It represents a strategic lever for ecological transition and territories resilience.

The evidence is clear: climate change, soil degradation[1], water scarcity, air pollution and declining biodiversity[2] are significantly compromising EU agriculture and food security. Several institutions, including the Joint Research Centre, the European Environment Agency (EEA) and the European Court of Auditors, underline the persistent gap between the Green Deal's ambitions and current developments.

In this context, organic farming stands out as a key structural response. Evidence indicates that it helps reduce greenhouse gas emissions, sequester carbon in soils, preserve natural resources and safeguard water quality, while promoting animal welfare. It also contributes to the dynamism of rural territories, job creation and the renewal of agricultural generations[3].
Positioned at the crossroads of environmental, economic and social challenges, organic farming therefore constitutes a fundamental pillar for the transition to more resilient, sustainable and equitable agricultural and food systems.

1- The *Europe's Environment — State and Outlook 2025* report, published by the EEA and the European Commission, emphasizes in particular the scale of soil degradation within the EU and in partner countries.

2- In 2024, a WWF report highlighted the catastrophic decline of biodiversity over the past fifty years and called on governments to recognize the urgency of the situation.

3- Eurostat data show that the share of farmers under 40 is higher in organic farming (20.7%) than across all farms (11.9%), indicating that organic farming plays a significant role in generational renewal in agriculture.

- Organic farming benefits are widely acknowledged by EU citizens. According to a 2025 CBI survey[1], 81% of them consider that organic products are produced using superior environmental practices, adhere to specific regulations on pesticides, fertilisers and antibiotics, and offer higher quality than other food products. Environmental protection therefore occupies a significant place in consumers' food purchasing decisions.

- Furthermore, according to a Eurobarometer survey published on 26 July 2024, 33% of respondents consider that the European Union should give priority to action in the fields of environment and climate change.

1- https://www.cbi.eu/market-information/natural-food-additives/which-trends-offer-opportunities?utm_source=chatgpt.com

Organic regulations and equivalence agreements

Organic regulations revised in 2022

- As of 1st January 2022, a revised organic farming regulation[1] entered into force to promote the development of organic agriculture by harmonizing practices across EU and enhancing consumer guarantees.

- The regulatory amendments cover production, controls and imports. Concerning production, new products eligible for organic certification include cotton, wool, leather and salt. The use of heterogeneous plant reproductive material is to be permitted, with details yet to be specified. Foods containing nanoparticles are ineligible for organic certification. Derogations allowing the use of organic plant reproductive material and the use of conventional animals will cease on 31 December 2036[2].

- Regarding controls, operators selling pre-packaged products are exempt from certification and distribution notification under specific conditions[3]. Operators selling small quantities of unpackaged organic products directly to consumers may be exempt from inspections. All organic operators undergo on-site inspections at least once a year. Group certification of producers is recognised and is notably applied in Italy.

- Concerning imports, the principle of equivalence will be replaced by compliance. Products imported into the EU must meet its regulations. Equivalent specifications will only be recognised under bilateral trade agreements or other existing agreements. A transition period is foreseen between the two systems. The European Union allows five years to negotiate such agreements with its partners. The European Commission may grant specific authorisations for the use of products and substances in third countries and the EU outermost regions, considering differences in ecological balances, specific climatic conditions, local traditions and regional circumstances. These specific authorisations may be issued for renewable periods of two years.

Judgment of 4th October 2024 by the Court of Justice of the EU

- Following the *Herbaria Kräuterparadies GmbH v. State of Bavaria* case, in its ruling of 4th October 2024, the Court of Justice of the European Union (CJEU) held that an organic product imported into the EU may bear the EU organic logo only if it fully complies with EU requirements and not solely with standards equivalent to those established under EU law.

- As a result of this decision, the basic organic farming regulation had to be reopened.

1- Regulation (EU) 2018/848

2- A review clause, starting on 1st January 2028, enables the European Commission to adopt delegated acts regarding measures that regulate the use of non-organic seeds, based on their market availability.

3- https://www.inao.gouv.fr/sites/default/files/2024-09/Note-GL-2022-Distribution.pdf

- The Court ruled that a third country organic production logo may be used within the European Union for imported products, even if it includes terms referring to organic production. Such a logo, however, is not likely to create the impression that the imported products comply with all of the EU's production and control requirements."

Simplification of organic regulations in 2025

- In December 2025, the European Commission issued a Proposal[1] for a Regulation of the European Parliament and of the Council amending Regulation (EU) 2018/848 with regard to certain production, labelling and certification rules, as well as provisions concerning trade with third countries.

- The main goals are to maintain high EU organic standards, ensure clear consumer information, preserve the competitiveness of EU producers and secure trade with third countries, while reducing unnecessary administrative burdens.

- The key amendments in this proposal relate to:

  - The general authorisation for the use of cleaning and disinfecting products available on the market,
  - The adaptation of labelling rules for products imported from third countries recognised as equivalent,
  - The extension of third-country recognition until 2036[2], in order to prevent trade interruptions and provide sufficient time for concluding international agreements,
  - The easing of certification requirements for small operators,
  - The simplification of rules applicable to groups of operators,
  - The adjustment of specific rules for animal production, including quails, poultry[3], veterinary treatments, outdoor access and maximum building area).

- This Proposal for a Regulation of the European Parliament and of the Council still needs to be examined and adopted by the European Parliament and the Council of the European Union before it can enter into force.

Organic dealcoholised wine

- A delegated regulation of the European Union, published on 26th February 2025, permits the full dealcoholisation of organic wines, using either vacuum distillation or evaporation."

1- It is accompanied by an implementation roadmap: https://agriculture.ec.europa.eu/farming/organic-farming/organics-glance_en#documents

2- Instead of the end of 2026, as initially planned.

3- It is proposed to introduce greater flexibility in the conditions for outdoor access, especially regarding the minimum area per animal, the maximum distance between buildings and outdoor runs, and the use of rotational or temporary grazing areas.

Equivalence agreements

- Equivalence agreements are provisions that eliminate the need for double certification, thereby reducing costs, inspections and paperwork.

- The European Union has concluded equivalence agreements with eleven third countries.

- As mentioned earlier, the European Commission wishes the recognition of third countries to be extended until 2036.

- Subsequently, imported products will be required to comply with EU regulations. Equivalent specifications will be recognised solely under bilateral trade agreements or other existing arrangements.

- Trade agreements have already been concluded with Chile and Switzerland and a mutual agreement has been reached with the United Kingdom, ensuring the continuity of the existing arrangement. A renegotiation with these three countries is therefore not necessary. Negotiations with other third countries that currently have organic equivalence agreements with the EU are ongoing and are expected to continue.

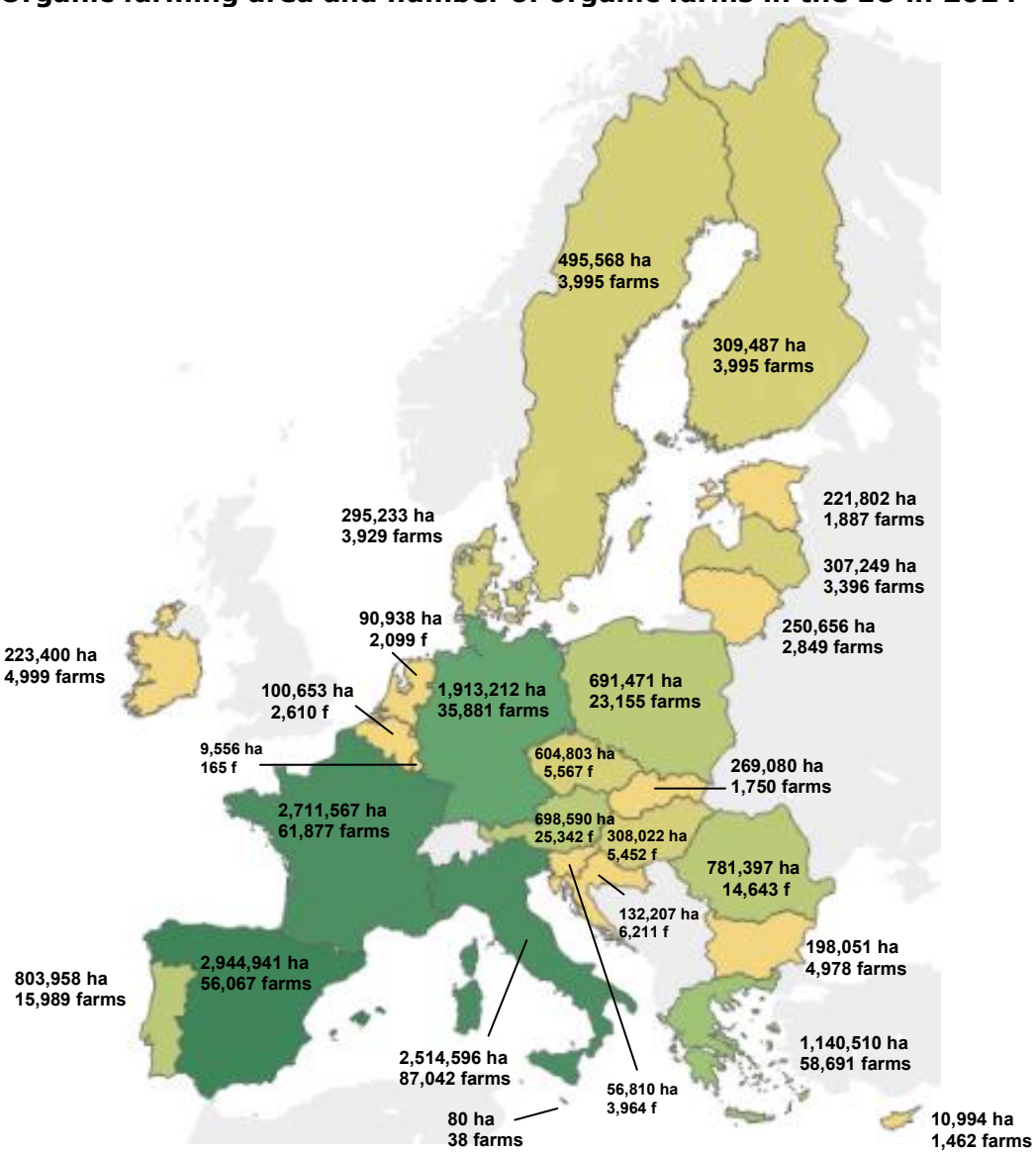
- The European Commission has officially included San Marino among the countries recognised as equivalent for organic certification. As a result, organic products from San Marino can be exported freely to the EU and use the EU organic logo.

The development and characteristics of organic production

Growth went on in 2024

■ Areas grown organically in the EU remained almost stable in 2024 (+0.6%), reaching nearly 18.1 million hectares. Over the past twenty years, these areas have more than tripled.
In 2024, organic farming accounted for 11.1% of the EU utilised agricultural area, compared with 10.9% in 2023.
Late 2024, over 438,000 organic farms were recorded in the EU, representing an increase of 1.0% compared with 2023 and more than a threefold rise over twenty years.

Organic farming area and number of organic farms in the EU in 2024[1]



Source: Agence BIO based on various European sources

1- 2024 for all countries, excepting Greece: 2023.

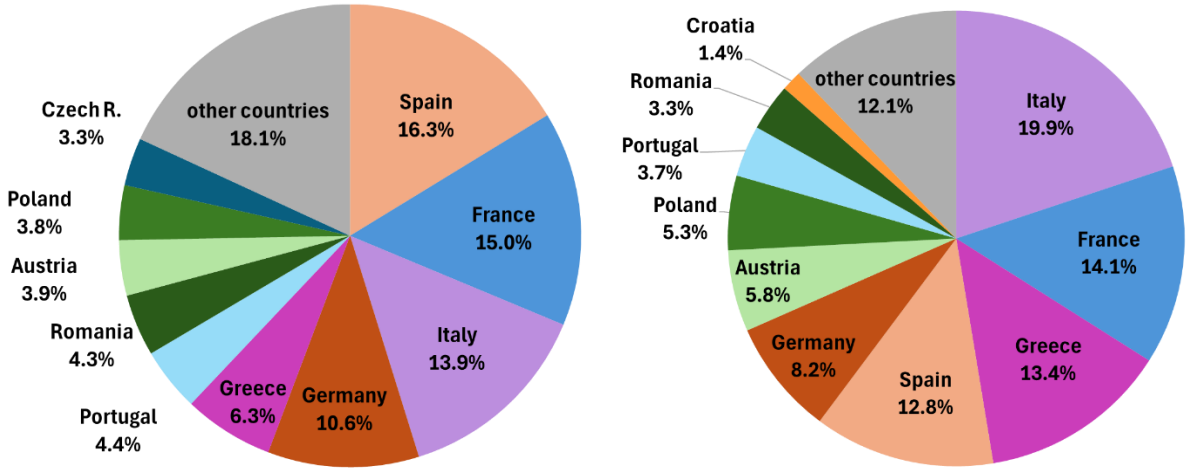
Areas grown organically and number of organic farms by country in 2023 and 2024

Pays	Areas grown organically (ha)			Share of the UAA grown organically		Number of organic farms			Share of organic farms	
	2023	2024	Change	2023	2024	2023	2024	Change	2023	2024
Germany	1,888,999	1,913,212	1.3%	11.4%	11.5%	36,680	35,881	-2.2%	14.3%	14.1%
Austria	701,161	698,590	-0.4%	27.3%	**27.2%**	24,450	25,342	3.6%	23.1%	23.0%
Belgium	102,359	100,653	-1.7%	7.5%	7.4%	2,639	2,610	-1.1%	nd	nd
Bulgaria	147,798	198,051	34.0%	2.9%	3.9%	4,438	4,978	12.2%	nd	nd
Cyprus	10,470	10,994	5.0%	7.7%	8.1%	1,515	1,462	-3.5%	nd	nd
Croatia	119,873	132,207	10.3%	8.0%	8.8%	6,274	6,211	-1.0%	nd	nd
Denmark	303,563	295,233	-2.7%	11.4%	11.1%	3,960	3,929	-0.8%	11.7%	12.1%
Spain	2,991,881	**2,944,941**	-1.6%	12.0%	12.3%	57,980	56,067	-3.3%	nd	nd
Estonia	225,256	221,802	-1.5%	22.9%	22.5%	1,968	1,887	-4.1%	nd	nd
Finland	311,498	309,487	-0.6%	13.7%	13.6%	4,153	3,995	-3.8%	nd	10.0%
France	2,767,764	2,711,567	-2.0%	10.3%	10.2%	60,995	61,877	1.4%	16.0%	14.9%
Greece	1,140,510	nd	nd	21.7%	nd	58,691	nd	nd	nd	nd
Hungary	320,251	308,022	-3.8%	6.4%	6.2%	5,983	5,452	-8.9%	nd	nd
Ireland	179,992	223,400	24.1%	4.0%	5.0%	4,076	4,999	22.6%	nd	nd
Italy	2,456,019	2,514,596	2.4%	19.8%	20.2%	84,191	**87,042**	3.4%	7.4%	nd
Latvia	297,111	307,249	3.4%	15.2%	15.6%	3,379	3,396	0.5%	nd	nd
Lithuania	256,286	250,656	-2.2%	8.5%	8.5%	2,596	2,849	9.7%	nd	nd
Luxembourg	8,737	9,556	9.4%	6.3%	7.2%	163	165	1.2%	nd	nd
Malta	66	80	21.2%	0.6%	0.8%	34	38	11.8%	nd	nd
Netherlands	87,924	90,938	3.4%	4.8%	5.4%	2,073	2,099	1.3%	nd	nd
Poland	636,021	691,471	8.7%	4.4%	4.8%	22,354	23,155	3.6%	nd	nd
Portugal	860,878	803,958	-6.6%	21.7%	20.3%	16,028	15,989	-0.2%	nd	nd
Czech Republic	595,190	604,803	1.6%	16.9%	17.2%	5,347	5,567	4.1%	12.5%	nd
Romania	693,998	781,397	12.6%	5.1%	5.8%	13,413	14,643	9.2%	nd	nd
Slovakia	261,060	269,080	3.1%	13.7%	14.1%	1,719	1,750	1.8%	nd	nd
Slovenia	54,603	56,810	4.0%	11.3%	11.7%	3,864	3,964	2.6%	6.0%	nd
Sweden	549,941	495,568	-9.9%	18.3%	16.5%	4,878	3,995	-18.1%	nd	nd
Total EU	**17,969,209**	**18,084,831**	**0.6%**	**10.9%**	**11.1%**	**433,841**	**438,033**	**1.0%**	**nd**	**nd**

Sources: Agence BIO, Agriland, BIO AUSTRIA, Czech Ministry of Agriculture, Dutch Ministry of Agriculture, Eurostat, FIBL/IFOAM, German Ministry of Agriculture, Jordbruksverket, Polish Ministry of Agriculture, Pro Luomu, SINAB, Spanish Ministry of Agriculture, StatBel and Statistical offices of Croatia, Denmark, Latvia and Slovenia.

In 2024, four countries—Spain, France, Italy and Germany—accounted for 56% of EU land grown organically, while Italy, France, Greece and Spain accounted for 60% of organic farms

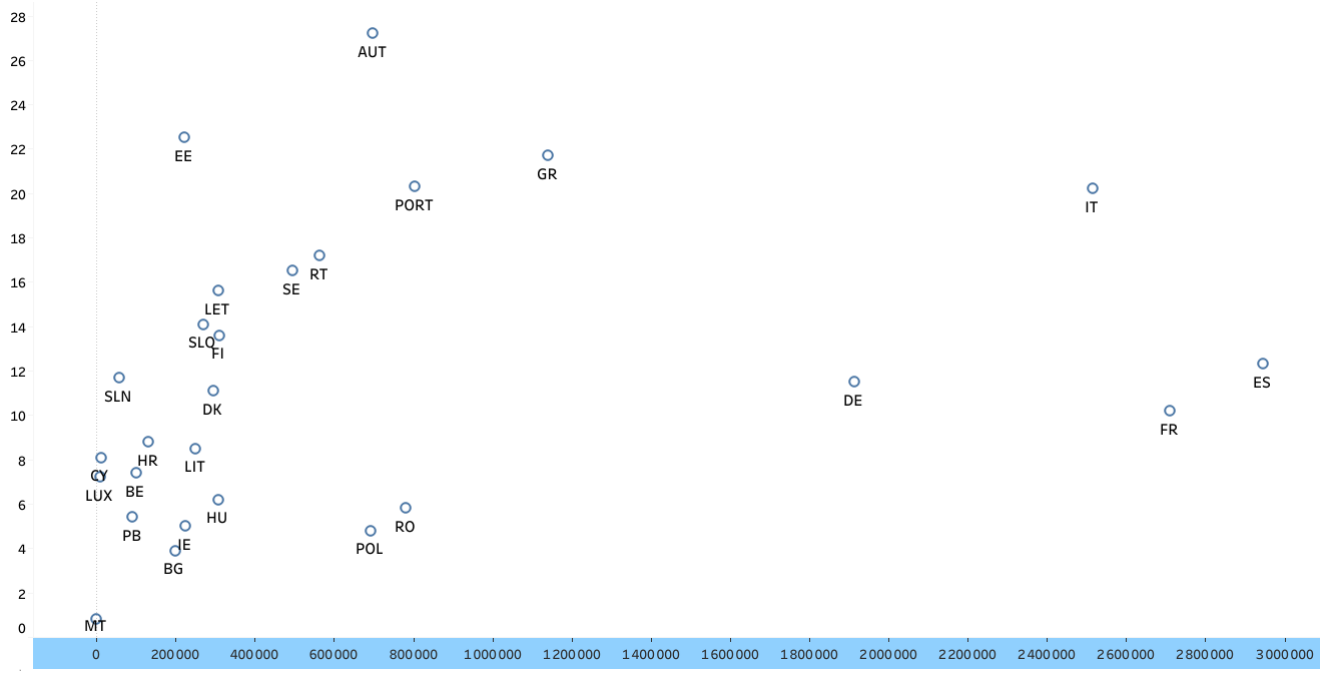
Distribution of EU organically grown areas and of EU organic farms in 2024



Source: Agence BIO based on various European sources

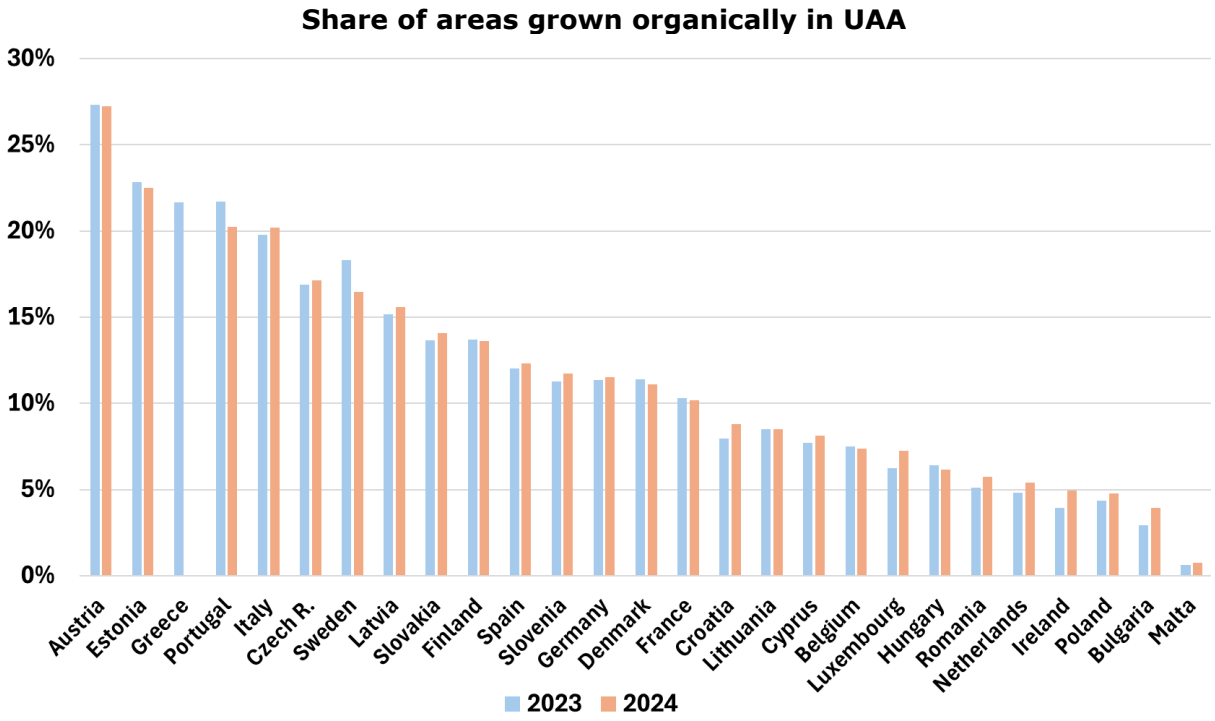
In 2024, Spain remained in first place for areas grown organically, with 16.3% of the EU organically grown area. However, Spain ranked only eleventh for the share of its UAA grown organically.

Organic areas (in ha) and share of UAA grown organically in 2024



Source: Agence BIO based on various European sources

This share varied greatly from one country to another. With 27.2% of UAA in 2024, Austria remained the EU country with the highest share of UAA grown organically[1].
In 2024, Austria was followed by Estonia (22.5%), Greece (21.7%), Portugal (20.3%) and Italy (20.2%).
In 2024, the share of UAA under organic farming exceeded 10% in fifteen countries[2].



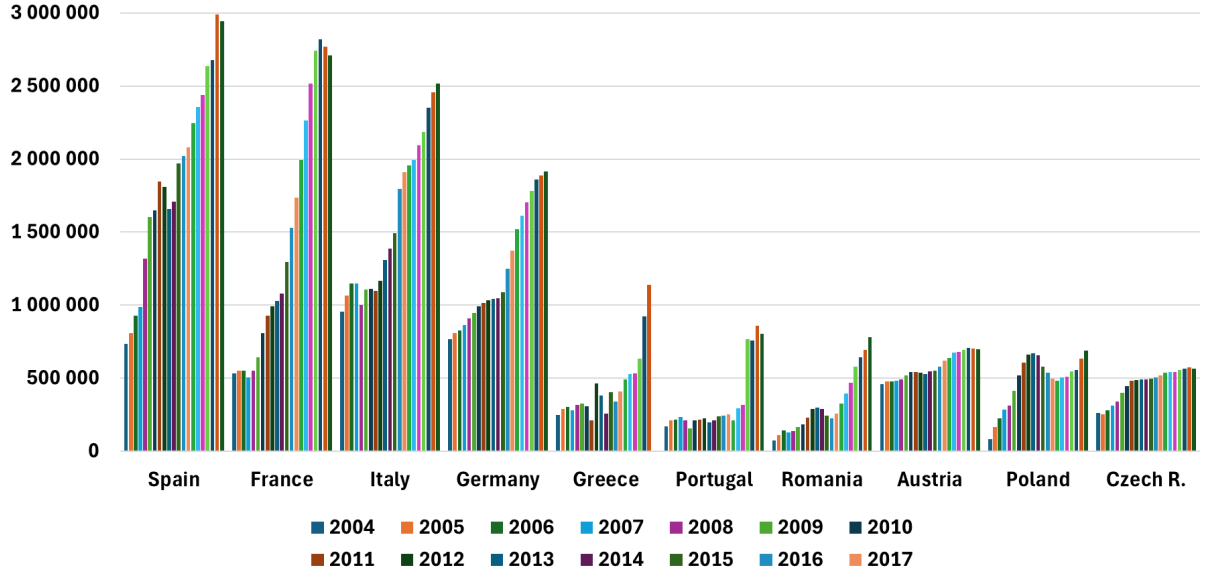
Source: Agence BIO based on various European sources

1- It nevertheless fell by 0.1 percentage points from 2023.
2- France ranked fifteenth in 2024.

Changes in land areas in the top ten countries over the past 20 years

- EU organically grown areas more than tripled between 2004 and 2024. The pace and regularity of this growth varied across countries.

Trends in areas grown organically in the EU top 10 producing countries since 2004



Source: Agence BIO based on various European sources

Spain

- Areas grown organically have quadrupled over twenty years, exceeding 2.9 million ha in 2024. This growth is linked to the expansion of Spanish organic imports.

- However, they declined between 2023 and 2024, after ten years of continuous growth. Fruit areas experienced the largest decrease in 2024 compared to 2023.

France

- French areas grown organically have more than quintupled over the past twenty years, reaching over 2.7 million ha in 2024.

- Following sixteen consecutive years of growth, French organic farmland decreased in 2023 and 2024.

Italy

- In twenty years, they have more than doubled, surpassing 2.5 million ha in 2024.

- They have been experiencing continuous growth for thirteen years.

Germany

- German areas grown organically have more than doubled over twenty years, exceeding 1.9 million ha in 2024.
In 2025, they increased by 1.1% compared to 2024.

- Growth continued without interruption over this period, with especially strong expansion between 2016 and 2020.

Greece

- In twenty years, Greek areas grown organically have almost increased fivefold, surpassing 1.1 million ha in 2023.

- Organically grown areas development was very irregular until 2016. Areas have been growing continuously since 2017.

Portugal

- Areas grown organically in Portugal have nearly quintupled over twenty years, reaching over 0.8 million ha in 2024

- However, the development of these areas was very irregular during this period.

Romania

- Romanian areas grown organically have nearly increased elevenfold between 2004 and 2024, approaching 0.8 million ha.

- Areas have been growing continuously since 2017. Prior to that, their development was more irregular.

Austria

- In Austria, areas increased by 52% over twenty years, reaching nearly 0.7 million ha in 2024.

- Areas experienced fairly irregular growth during this period, with continuous growth, however, from 2014 to 2022.

Poland

- Areas grown organically in Poland have increased more than eightfold between 2004 and 2024, reaching nearly 0.7 million ha.

- Growth of organically farmed areas has been quite uneven but has been steady since 2019.

Czech Republic

- In the Czech Republic, areas grown organically have more than doubled over twenty years, exceeding 0.6 million ha in 2024.
- They have experienced uninterrupted growth since 2006.

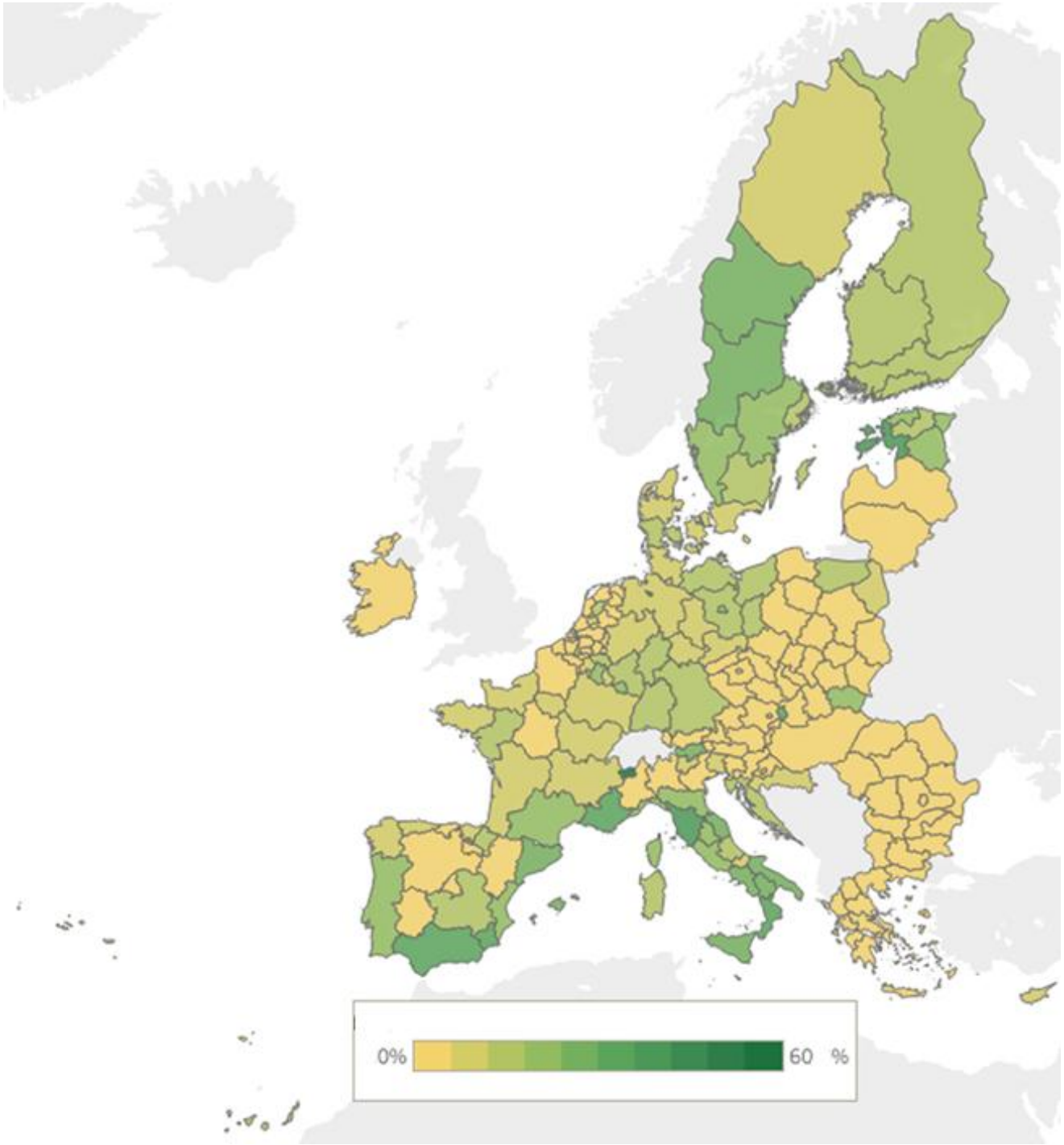
Significant regional specificities within each country

Main regions for areas grown organically in the top 10 countries

- In 2024, Andalusia remained Spain's main organic region, with 47% of the country's organically grown areas, compared to around 40% in 2004.
- In 2024, 22% of French areas grown organically were located in Occitanie.
- Sicily accounted for 16% of Italy's areas grown organically in 2024. The top four regions, including Apulia, Tuscany and Emilia-Romagna, represented 46% of the total areas.
- Bavaria is Germany's main organic region, accounting for 22% of the areas grown organically in 2024.
- Central Macedonia is Greece's main region for areas grown organically, accounting for 16% of the country's total in 2022.
- In Portugal, the two main regions, Alentejo and Beira Interior, accounted for 79% of the areas grown organically in 2024.
- Tulcea and Timis are Romania's top counties for areas grown organically, each representing about 8% of the total in 2024.
- In Austria, Lower Austria accounted for nearly one-third of the country's areas grown organically in 2024.
- West Pomerania and Warmia-Masuria dominated organic farming in Poland in 2024, each accounting for around 17% of the areas grown organically.
- In the Czech Republic, South Bohemia is the region with the largest areas grown organically, accounting for about 16% in 2022.

Main regions for organic share of the UAA

Share of areas grown organically in the UAA at regional level in 2024



Source: Agence BIO based on various European sources

- The share of areas grow organically is particularly high in some regions. In 2024, it was:
  - above 50% in the Aosta Valley (59.2%) in Italy and in the Salzburg region in Austria (56.9%),
  - between 40 and 50% in western Estonia (Lääne-Eesti),
  - between 30 and 40% in two Austrian regions: Burgenland and Vienna, in the Bremen region (Germany), in two Italian regions: Tuscany and Calabria, in the north-west of the Czech Republic, in Provence-Alpes-Côte d'Azur (France), in two Spanish regions: Andalusia and Murcia, and in the Bratislava region (Slovakia),
  - between 25 and 30% in five Italian regions: Sicily, Campania, Marche, Basilicata and Bolzano/South Tyrol, in Moravia-Silesia (Czech Republic), in two Spanish regions: Balearic Islands and Catalonia, in two Swedish regions: Central-North and Central Norrland, and in three Austrian regions: Lower Austria, Styria and Carinthia,
  - between 20 and 25% in Tyrol (Austria), in three Italian regions: Apulia, Lazio and Liguria, in three Estonian regions: Lõuna-Eesti, Kirde-Eesti and Põhja-Eesti, in the Valencian Community (Spain), in the Belgian province of Luxembourg, in two Czech regions: Southwest and Central Moravia, in eastern Slovakia, in two German regions: Saarland and Berlin, in the Åland Islands (Finland) and in Corsica (France),
  - between 15 and 20% in two Austrian regions: Vorarlberg and Upper Austria, in four Swedish regions: West, East-Central, Småland and the Islands and Stockholm, in Occitanie (France), in four Italian regions: Emilia-Romagna, Umbria, Abruzzo and Sardinia, in mainland Portugal, in two Greek regions: Eastern Macedonia and the North Aegean, in four German regions: Brandenburg, Hesse, Mecklenburg-Western Pomerania and Baden-Württemberg, in the Belgian province of Liège, in the Canary Islands (Spain), in two Finnish regions: Helsinki-Uusimaa and Northern and Eastern Finland, in Latvia and in Adriatic Croatia,
  - between 10 and 15% in three Polish regions: West Pomerania, Lubusz and Warmia-Masuria, in Flevoland (The Netherlands), in north-eastern Czech Republic, in four German regions: Bavaria, Rhineland-Palatinate, Hamburg and Saxony, in two Spanish regions: Navarre and Castilla-La Mancha, in Kesk-Eesti (Estonia), in two Finnish regions: Western Finland and Southern Finland, in four French regions: Pays de la Loire, French Guiana, Auvergne-Rhône-Alpes and Brittany, in Slovenia, in four Danish regions: Southern Denmark, Central Jutland, Northern Jutland and Capital Region, in two Greek regions: Crete and Western Greece, in the Belgian province of Namur and in Molise (Italy),
- By contrast, the organic share was below 1% in six regions of Romania: North-East, Centre, North-West, South-East, South-West Oltenia and Bucharest–Ilfov, in Malta and in the Opole Voivodeship (Poland).

Other operators in the organic sector

A heterogeneous development of the processing of organic food

- Over 71,200 organic processors[1] were recorded in the EU in 2024, representing a decrease of 3.5% compared with 2023, but an increase of 64% compared with 2014.

- The three main categories of processed organic products are fruits & vegetables, cereals and dairy products.

- In 2024, France ranked first with 20,493 processors, representing an increase of 1.6% compared with 2023. It accounted for nearly 29% of the EU organic processors. Auvergne-Rhône-Alpes was the French region with the highest number of organic processors in 2024.

- In 2024, the number of organic processors fell by 12% in Germany, reaching 19,692 (compared with 22,382 in 2023).
In 2023, a quarter of the companies were located in Bavaria, 17% in Baden-Württemberg and 14% in North Rhine-Westphalia."

- In Italy, 9,568 organic processors were recorded in 2024, representing a 1.4% decrease compared with 2023. The processing of organic products mainly takes place in the south of the country (Sicily, Apulia and Calabria).

- Spain ranked fourth in 2024, with 6,174 organic processors, representing a 0.4% increase compared with 2023. Spanish organic processors are mainly located in Andalusia, the Valencian Community and Catalonia.

Importers and exporters of organic products

- The European Union had over 6,900 organic importers in 2024 (−4.5% compared with 2023). Germany accounted for 26% of EU organic importers in 2023, well ahead of France (16%), Italy (8%) and Spain (8%).

- The European Union had over 5,300 organic exporters in 2024. Germany accounted for 29% of the organic exporters recorded in the EU in 2024 and Italy for 20%.

1- Exclusive processors with no production activity

Characteristics and trends of the organic products market

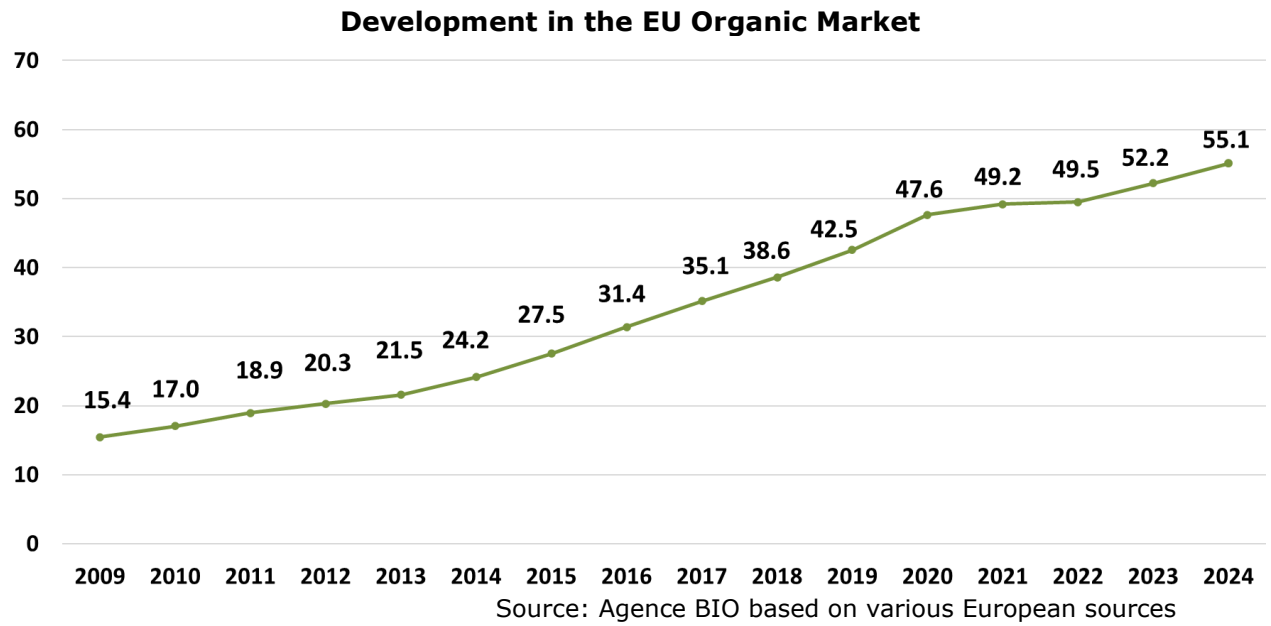
- The COVID-19 pandemic has greatly increased the importance of health in food choices.

- The war between Russia and Ukraine had a significant impact on the economies of EU Member States, which faced very high inflation rates in 2022 and 2023, reaching levels not seen since the Euro introduction more than twenty years ago. According to the European Central Bank, however, not all of the inflation can be explained by direct effects of the war. In particular, the rise in corporate profits 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 product purchases, which saw volume decreases in many countries. There has been a shift in organic sales, notably towards discount stores and private-label products.

- Currently, organic product sales are rising again in the vast majority of EU Member States.

The EU organic market continues to grow.

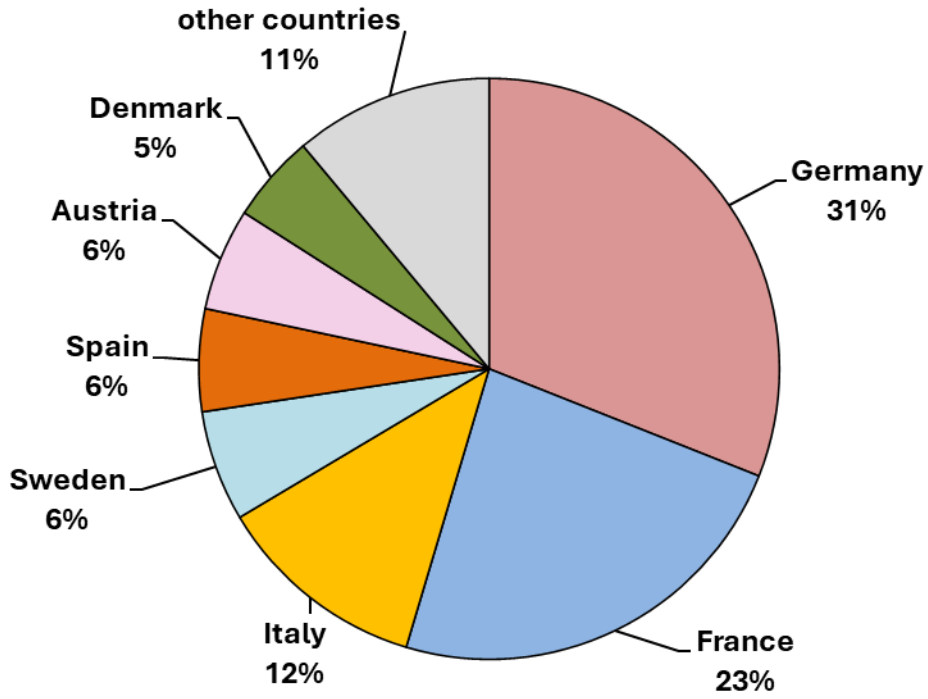
- Organic consumption was estimated at €55.1 billion for 2024, representing an overall increase of 5.5% compared with 2023. It has grown 2.3-fold over the past ten years



Source: Agence BIO based on various European sources

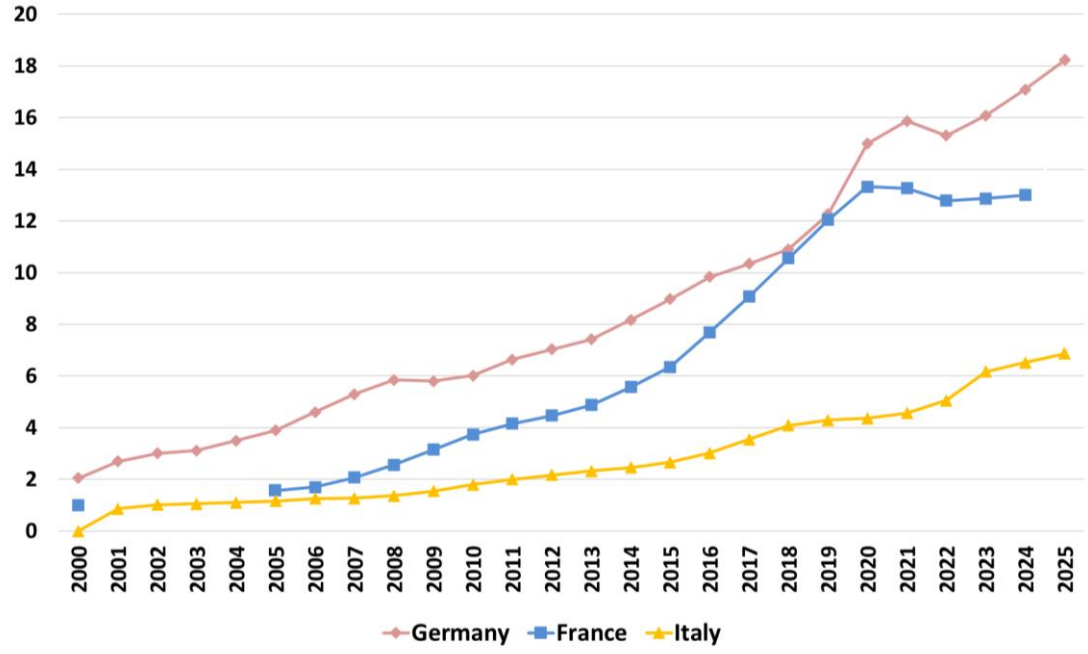
- In 2024, 55% of organic products (value) were consumed in two countries: Germany and France.

Distribution of the EU Organic Market in 2024



Source: Agence BIO based on various European sources

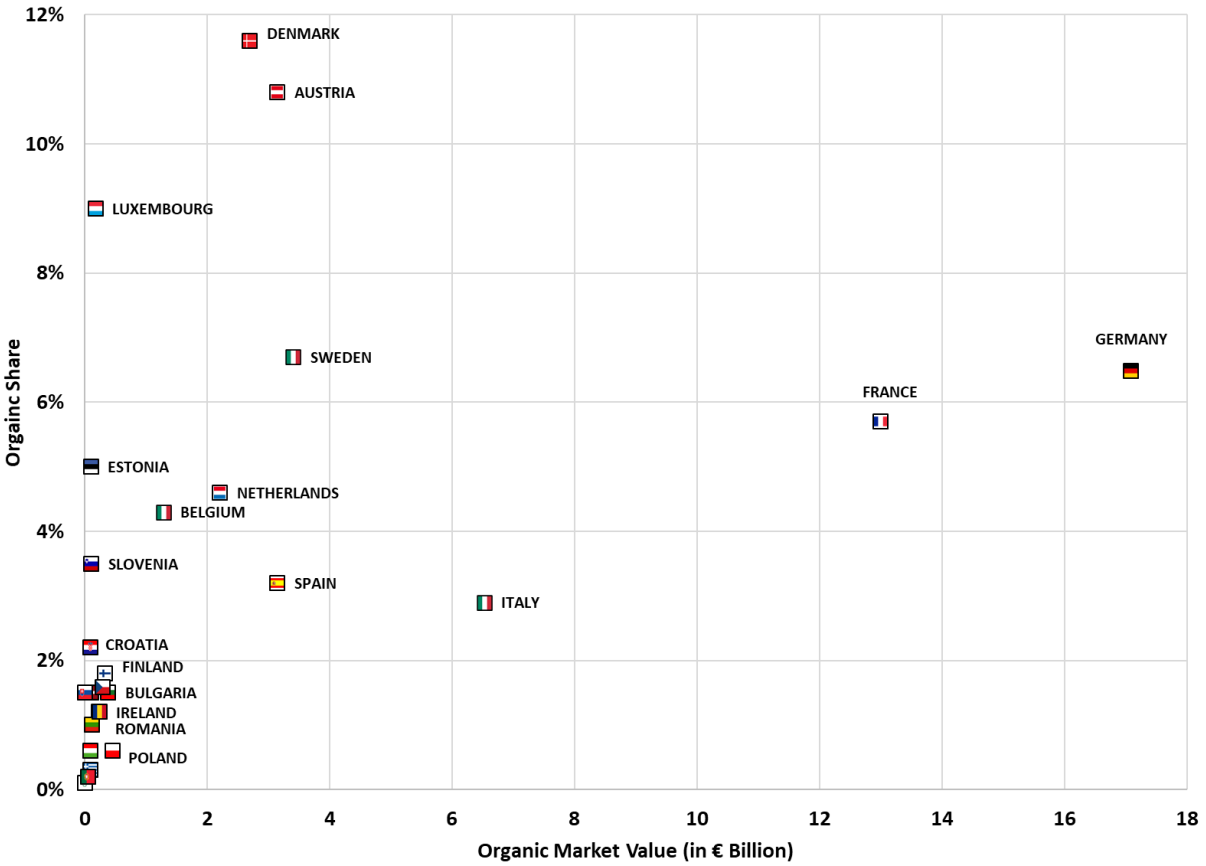
Development of the Top Three EU Organic Markets (in € billion)



Source: Agence BIO based on various European sources

Denmark is the EU country with the highest share of organic products in food purchases (11.6% by value in mass retail and online in 2024).

EU Countries Organic Market Value and Share of Total Food Consumption in 2024

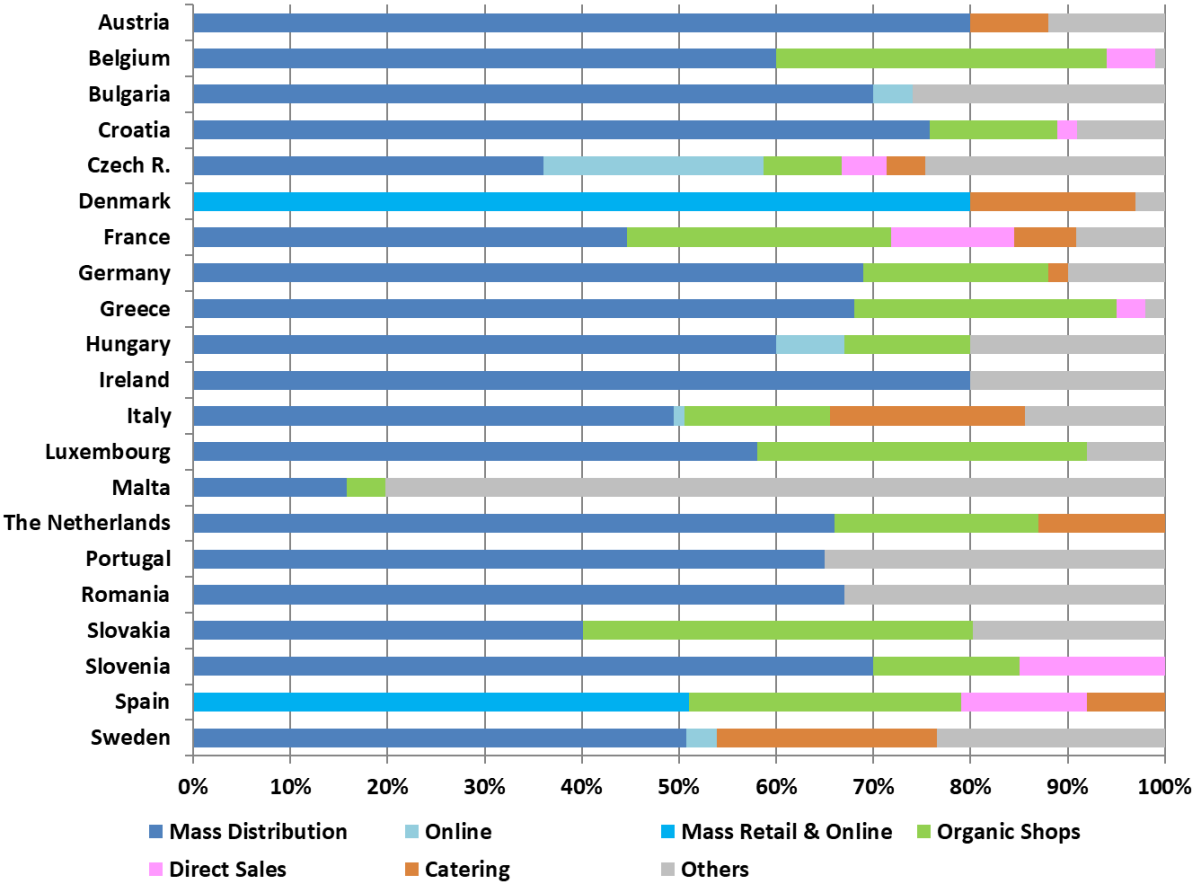


Source: Agence BIO based on various European sources

More or less diversified and structured distribution channels

In several countries, such as France and Germany, the organic market initially developed through organic shops. In others, such as Denmark and Austria, supermarkets were the main driver of organic market growth. In countries where organic consumption is still modest, growth is also primarily driven by supermarkets.

Importance of Distribution Channels for Organic Products by Country



Note: Data are not available for all Member States.

Source: Agence BIO based on various European sources

We can distinguish:

- Countries where distribution is relatively diversified but large retail has the largest share: Germany, Belgium, Spain, France, Hungary, Italy, Luxembourg, The Netherlands, Portugal, Czech Republic and Sweden.

- Countries where mass retail clearly dominates: Austria, Bulgaria, Croatia, Denmark, Finland, Greece, Ireland, Romania and Slovenia.

Organic markets with more diversified distribution tend to evolve more steadily. They are indeed better able to withstand potential market fluctuations.

Germany, France and Italy are the countries with the highest number of organic shops.

Focus on the 10 main EU organic markets

Germany: First EU organic market

Key developments

- The German organic market has increased 4.9-fold over twenty years and 2.1-fold over ten years, reaching €17.09 billion (excluding out-of-home catering[1]) in 2024. The organic market grew by 6.3% in 2024. While the increase in 2023 was driven by inflation, the 2024's growth was due to an increase in sales volumes.

- In 2025, the German organic market reached €18.23 billion, representing a 6.7% increase compared with 2024. In 2025, the organic market share was estimated at 6.5%. The organic sales growth of 2025 was driven by an increase in quantities sold and a small effect of inflation.

- In 2025, large retail remained the main channel for marketing organic products, with a 70% share, ahead of organic distribution (18%) and other channels[2] (nearly 12%). Mass distribution share has grown significantly since 2000, when it stood at 33.2%.

Large retail

- The German mass distribution is mainly composed of supermarkets (44.5% of organic sales in large retail in 2025), discount stores (39.3%) and drugstores (16.2%).

- The hypermarket format has not developed because food stores are generally located within cities.

- In 2025, organic sales in large retail overall increased by 8.8% in value[3]. The strongest growth occurred in drugstores with +14.4%, followed by supermarkets with +8.6% and discount stores with +6.8%.

- Loyalty programmes[4] are becoming increasingly important in supermarkets and prices are not necessarily higher than those in discount stores.

- Drugstores, such as DM and Rossmann, are well established in city centres, giving them a competitive advantage, but they do not offer fresh organic products. They expanded their organic range in 2024.
Drugstores hold a particularly strong position in non-perishable organic products, focusing on health and wellness. They stand out both for the breadth of their offering

1- A survey, conducted by AMI and Ecozept on behalf of the Federal Ministry of Agriculture, began in April 2025 to determine organic spending in out-of-home catering.

2- Farmers shops, markets, specialist shops, natural product stores and online shops

3- Compared with 8.4% in 2024 versus 2023, with +5.2% in supermarkets, +8.8% in discount stores, and +17.5% in drugstores

4- Various measures are implemented: discounts, special promotions, personalized coupons and exclusive offers, generally through apps where customers are required to provide their data.

and the level of their sales in these categories, which are not always as widely available in mainstream supermarkets.
Drugstores continued to increase their market share in 2025, notably at the expense of discount stores.

- The difficult economic situation is affecting organic product sales in discount stores, as many households more frequently choose conventional products when comparing prices. The discounters selling the most organic products are Aldi and Lidl. In recent years, they have expanded their organic ranges. In 2024, Aldi Süd became the leading organic product retailer in Germany, surpassing Edeka. It offers a range of over 1,000 organic products. Lidl's assortment is smaller than Aldi's, but the retailer launched regional organic ranges in 2024.

- The three large retail formats have significantly expanded their organic ranges in recent years, thereby reaching broad customer segments.

- Private-label share in the organic assortment of large retail has continued to grow in recent years. They currently account for 65% of packaged organic product sales in large retail[1].

- Large retail communicates extensively about sustainability. Organic products play a central role in this strategy.

- For several years, retailers have been cooperating with organic associations to develop their ranges and gain credibility: Lidl and Edeka with Bioland, Aldi Süd, Edeka and REWE with Naturland, and REWE, Kaufland/Real and Edeka with Demeter. This trend has developed over recent years.

- According to Ecozept, almost all national organic brands that were historically sold exclusively in organic distribution are now available in large retail, thus contributing to the erosion of the exclusivity of organic shops.

Organic distribution

- Organic distribution includes organic shops, natural food stores (Reformhäuser) and large farmers shops. In 2024, the number of organic shops and supermarkets[2] fell below the 2,000 marks, reaching 1,974 (compared with 2,042 in 2023). Over the past decade, Germany has lost around 400 organic outlets.
In 2025, Germany had 871 Reformhäuser.
Sales in organic distribution increased by 2.3% in 2025 compared with 2024[3]. According to BioVista, growth among organic retailers was mainly driven by the fresh fruit and vegetable segment. This development is particularly supported by organic supermarkets, which are expanding rapidly. In contrast, small organic shops are increasingly struggling to remain competitive.

1-The share is 47% without discount stores.
2- Excluding natural food stores
3- Compared with +3.5% in 2024 versus 2023.

The main organic chains are Denn's Biomarkt, founded in 2003 and with around 370 shops and Alnatura, founded in 1984, with 153 outlets. Both chains continue to expand. In 2023, Alnatura launched a new low-price private-label range: "Prima".
Two-thirds of organic outlets have a surface area greater than 100 m².
Over the past few years, most newly opened stores have included a dining area.

Other channels

- Organic sales through other channels increased by 2.1% in 2025 compared with 2024[1].

Online organic product sales continue to grow and the range offered to consumers has expanded.

- In 2019, AMI recorded 768 bakeries offering organic products and 349 butcher shops with organic meat[2].

Organic consumers

- According to the Ökobarometer of December 2024, 84% of respondents buy organic products, with 38%[3] purchasing them frequently and 46% more occasionally. According to a 2025 study by the Robert Bosch Foundation, one in five Germans primarily buys organic food.

- Heavy consumers of organic products mainly live in southern Germany and Berlin.

- According to a GfK/NielsenIQ study, 47% of young German consumers (aged 18 to 29) consider organic products to be of higher quality than branded products. Attributes such as freshness, animal welfare and healthy ingredients are also more likely to be associated with organic products than with branded products.

- The main reasons for buying organic products are animal welfare and health.

Price remains the main barrier, especially for young consumers.

- The most purchased organic products are eggs, dairy products, vegetables and fruits.

France: Second-largest EU organic market

Key developments

- The French organic market has more than doubled over ten years, exceeding €13 billion in 2024 at the retail stage (including out-of-home catering) [4], representing a 1.0% increase compared with 2023. However, it remains below its level of 2020 and 2021.

1- Following a 0.9% decline in 2024.

2- Bavaria is the Land with the highest number of specialised retailers offering organic products.

3- Of which 4% exclusively.

4- This is an estimate of the aggregate consumption of organic products at home and in out-of-home catering at the retail stage. At the wholesale stage, the value of the organic market for home and out-of-home consumption amounted to €10.128 billion in 2024 (compared with €9.899 billion in 2023).

The organic market share in retail sales remained stable at 5.7% (compared with 6.6% in 2021).
The market for organic products consumed at home reached €12.176 billion, representing growth of 0.8% compared with 2023 (including inflation). When the price effect on the organic market is taken into account, the market declined by 1.1% in volume compared with 2023.

- During the first half of 2025, the French organic market grew by 4.1% compared with the first half of 2024. Organic sales increased across all distribution channels.

- Large retail accounted for 45% of the French organic market in value in 2024, ahead of organic shops (27%), direct sales (13%), specialised retailers (9%) and the food service sector (6%).

Large retail

- Organic sales in large retail declined overall by 5.1% in 2024[1] compared with 2023.

- Supermarkets remained the main sub-channel, accounting for 36% of organic sales in large retail, ahead of hypermarkets (around one third).

- Large retail chains recorded a significant decline in the number of organic products references and an increase in the share of private-label products, in a context of near-stable organic food prices. However, situations varied and some retailers recorded an increase in the value of their organic sales in 2024. Hypermarkets, supermarkets and convenience stores proved more resilient to the decline in both the range of products offered and organic sales than drive pickup and discount stores.

Organic distribution

- In France, the organic distribution has long been established. It was there that the first chain of organic shops, La Vie Claire, was founded, with its first store opening in 1948, along with the first organic supermarkets.

- Today, there are around fifteen organic chains in France. National chains accounted for 62% of organic distribution outlets in 2024. Biocoop[2] remained the leading organic retailer in 2024, representing 44% of the sector turnover. Late June 2025, it operated 739 shops, offering up to 10,500 product references. Naturalia ranked second in terms of turnover, while La Vie Claire led in terms of shops number. In 2024, the total number of organic shops continued to decline, reaching 2,697, a 4.6% decrease compared with 2023[3]. Total sales area fell by 4.1%, to 742,219 m², while the average store size remained relatively stable at 275 m².

- Sales in organic distribution nevertheless increased by 6.5% in 2024 compared with 2023. Volumes sold grew faster than prices.

1- 4th consecutive year of decline
2- Established in 1986.
3- 2 601 organic shops late 2025

In recent years, organic chains have continued to expand their private-label ranges. La Vie Claire was the organic retailer with the largest number of organic private-label products in 2025 (2,000), ahead of Biocoop (583[1]). Private-label sales accounted for 56% of La Vie Claire's turnover and over 10% of Biocoop' s turnover.
The private-label brand of independent organic shops, Elibio, was launched in 2019 and offered over 100 grocery and beverage product references in 2025.

Other channels

In 2024, direct sales remained the most dynamic channel for the second consecutive year, with growth of 7.4%. The number of organic producers engaging in direct sales increased, as did their average turnover through this channel. Growth was mainly driven by direct sales of wine and fruits & vegetables.

The organic sales in specialised retailers grew by 6.9% in 2020, driven by strong sales of organic wine in wine shops and the growth of alternative local grocery stores.

Regarding online sales, they grew by 14% in organic distribution, while declining by 5.2% in large retail. Trends were heterogeneous across companies, with some experiencing declines and others strong growth.
The online organic supermarket Greenweez was launched in 2008 and acquired by Carrefour in 2016. By 2025, Greenweez offered over 15,000 organic product references.
La Fourche, founded in 2018, plans significant expansion of its activity. By early 2025, it already had over 130,000 members. It acquired its competitor, Aurore Market, in 2022. La Fourche's range includes over 4,500 organic products, while Aurore Market offers nearly 4,000.

In 2024, organic purchases in collective catering increased by 6.4% compared with 2023, while those in commercial catering grew by 9.5%.

Organic consumers

According to the Agence BIO/Spirit Insight Barometer, 54% of French consumers purchased organic products at least once a month in 2024 (compared with 60% in 2022) and 30% at least once a week.

Young people and individuals with higher education consume more organic products than the average French population.

Health preservation remains the main motivation for purchasing organic products, ahead of product quality and taste.
Price remains the primary barrier to growth in the organic market. However, younger consumers are more accepting than other generations of paying a premium for organic products.

Grocery products remained the most consumed organic food in France in 2024, ahead of fresh fruits & vegetables.

1- Private-label sales account for over 10% of Biocoop' s turnover.

Italy: A still growing market

Key developments

- In 2024, the organic market grew by 5.7% compared with 2023, reaching €6.526 billion. Volumes sold also increased.
The Italian organic market has grown 2.7-fold in value over the past ten years.
The organic market share stood at 3.6% in 2024.

- In 2025, the Italian organic market increased by nearly 5%, reaching €6.871 billion. Retail sales grew by 6.2%, while food service sales increased by 1.6%.

- In 2024, mass distribution remained the leading channel for organic sales, accounting for 51%, ahead of the food service sector (20%), organic distribution (15%) and other channels[1] (14%).

Large retail

- In 2024, organic sales in large retail grew by 5.3% compared with 2023. Supermarkets and hypermarkets continued to account for the bulk of organic sales in large retail. Nevertheless, discount stores remained the most dynamic sub-channel in 2024, with organic sales increasing by 6% in value compared with 2023. By contrast, online organic sales in mass distribution experienced a slight decline in 2024 (-0.4%).

- In 2025, organic sales in Italian large retail grew by 4.9% compared with 2024, with increases of 4.3% in hypermarkets and supermarkets, 6.8% in discount stores and 5.9% online.

- Currently, all large retail chains offer organic products. Biobank recorded over 6,000 organic private-label references[2] in Italian mass distribution in 2023. In 2023, Coop remained the retailer with the largest number of organic private-label references, with 1,050.
On average, stores offered 253 organic references[3] in 2023.

Food service

- Organic turnover in the food service sector increased by 5% in 2024[4].

Organic distribution

- Organic sales in organic shops increased by 9% in 2024, representing a stronger growth than in previous years.

1- Including convenience stores, drugstores, petrol stations and markets.

2- According to a SWG/Carrefour Italy survey, Italian consumers' confidence in supermarket private-label ranges remained strong, reaching 76% in 2024.

3- Compared with 180 in 2019 and 92 in 2001.

4- More information is available in the chapter on organic products in the food service sector.

There were 1,022 organic shops in 2023[1]. In recent years, Italian organic distribution has undergone significant changes: the number of outlets is declining, chains are merging and fully independent shops are less numerous than before. In 2023, 41% of outlets were part of organic chains.

Lombardy remained the region with the highest number of organic shops in 2023 (149). In 2024, 58% of Italian organic shops were located in the northern part of the country.

There are several organic chains, but only one with a national presence: NaturaSì. It celebrated its 40th anniversary in 2025. By 2025, it operated 330 organic supermarkets and offered up to 4,500 organic references in its largest stores, including 1,700 private-label products. NaturaSì plans to open additional organic stores.

Italy, organic shops tend to be smaller than in France. In 2023, 26% of outlets occupied less than 70 m². In addition, the shares of fresh products and bulk items are lower than in France.

Most chains have launched their own private-label brands.
The organic range in organic shops remains much broader than in large retail.
In 2023, 13% of organic shops included a catering area.

Other channels

In 2023, there were 668 online shops offering organic products, compared with 547 in 2020.

BioBank recorded 233 organic markets in 2023.

Organic consumers

In 2024, 93% of Italian households purchased an organic product at least once, the same share as in 2025 (compared with 90% in 2023).

The largest consumers of organic products are young people and individuals with higher education. Organic consumption is more developed in the northern part of the country, but it has also been growing in the South in recent years.

The most consumed organic products are fruits & vegetables and dairy products.

Consumption habits in Italy are changing as people adopt more sustainable lifestyles and become increasingly aware of the link between diet and health.

In Italy, health and food safety are the main reasons for purchasing organic products, ahead of environmental protection.
Italians are highly attached to the local origin of products. The health crisis has strengthened their interest in local products.

1- Compared with 1,240 in 2021, 1,163 in 2010, and 682 in 1993.

Moreover, it is the EU country with the highest per capita food expenditure. Food quality is a very important criterion for consumers when making their choices.

Sweden: Decline of the Organic Market Since 2020

Key developments

- In 2024, the Swedish organic market declined by 1.5% compared with 2023[1], reaching €3.4 billion. Despite a market decline over several years, in 2024 it still represented double the value from ten years ago.
Organic product prices remained relatively stable in 2024, while the volumes sold decreased slightly. Due to the high food price inflation in 2022 and 2023, prices were still perceived as high in 2024, even though inflation during the year was relatively moderate.
The organic market share stood at 6.7% in 2024 (compared with 7.8% in 2023).

- In 2024, large retail (excluding online sales) remained the main distribution channel, accounting for 44.9% of the organic market, ahead of the food service sector (25.8%), the state monopoly (25.6%) and online sales (3.1%).

Large retail

- In 2024, organic sales in large retail declined by 2.5%.

- Private-label products account for a significant share of organic sales in large retail. ICA is the leading retailer of organic products. However, its organic range has declined considerably in recent years (1,100 references in 2022 compared with 3,200 in 2020). Axfood offers between 800 and 1,000 organic references depending on the store type, while Lidl has a range of over 300 organic products.

- Coop is the retail chain with the highest share of organic products in its assortment (12% in 2022).

- For several years, Swedish and local products have been promoted more than organic products in large retail.

food service

- Organic sales in restaurants declined by 2.8% in 2024, while the use of organic products by canteens remained almost stable (-0.2%).

Systembolaget

- Systembolaget, the state monopoly, operates over 450 stores across Sweden, as well as an online store.

1- In a context of a 3.5% increase in the overall food market.

- This is the only channel where organic sales increased in 2024, by 1.0%. This growth is far below the levels seen in previous years (+32% in 2016) because Systembolaget reached the 10% volume target for organic sales it had set for 2020 as early as 2015.
Wine is the main organic product category sold by the monopoly, accounting for one quarter of its organic alcoholic beverage sales. In 2024, 24.9% of the wine volumes sold by the monopoly were organic (25.4% in value).

Other channels

- Online was the channel where organic sales declined the most in 2024, falling by 7.1%. The two main online retailers are MatHem and Mat.se, with approximately 20% of their range being organic/ecological.

- Direct sales accounted for only 0.6% of the Swedish organic market in 2024. However, the organic share in direct sales stood at 21% in 2024.

Organic consumers

- In 2024, 38% of Swedes purchased organic products at least once a week.

- The main organic product categories sold in Sweden are beverages and fresh fruits & vegetables.

- Women, especially mothers, buy more organic products than men.

- The main reasons for consuming organic products are health, environmental protection and animal welfare. Price is the primary barrier to the development of the Swedish organic market, followed by the difficulty of finding some organic products in large retail.

Spain: A relatively recent development of the domestic market

Key developments

- The Spanish organic market increased 2.6-fold between 2014 and 2024, reaching €3.143 billion. Growth was 3% in 2024 compared with 2023.
The organic market share was estimated at 3.2% in 2024 (compared with 2.5% in 2020).

- In 2024, large retail remained the main channel for organic products, accounting for around half of the organic market, ahead of organic distribution, direct sales and the food service sector.

Large retail

- The growth of the Spanish organic market is strongly linked to organic range development in large retail. Most chains already have thousands of organic references in their assortment, covering nearly all the needs of the average consumer. Aldi and Lidl regularly introduce new organic products. Late 2024, Aldi offered an organic range of 490 in its Spanish stores, most of them under its private-label brand GutBio.

- The main retail chains are increasingly offering organic products under private-label brands. According to Kantar Worldpanel, private-label products are taking up a growing share of organic purchases in Spain. However, a significant portion of these products comes from abroad. Moreover, organic sections have been expanding in large retail in recent years, increasing the visibility of organic products. One example is the Biosfera section at El Corte Inglés.

- The main organic product retailers are Lidl, Carrefour and Aldi.

- On a very local scale, two chains, Spar and HD Covalco, have opened hybrid stores with a wide organic range, complemented by their regular range.

- The leading Spanish mass retailer, Mercadona, has finally introduced organic products in its stores, under its private-label brand.

Organic distribution

- Currently, there are between 3,000 and 4,000 organic shops in Spain. The Spanish organic distribution is undergoing major restructuring. In recent years, medium- to large-sized shops have primarily been opened. The new outlets are mostly located in major cities and tourist areas.

- The main organic chains are Veritas and Herbolario Navarro. Early 2025, Veritas had 80 outlets[1] and offered over 6,000 organic references.
Herbolario Navarro had over 70 outlets at the beginning of 2025.
Both chains also operate their own online shops.

Other channels

- In 2019, the food service sector accounted for around 2% of the Spanish organic market. The introduction of organic products in this channel is growing.

- Organic markets exist throughout Spain. In 2024, direct organic sales grew by 7.4% compared with 2023.

Organic consumers

- In 2024, 93% of Spaniards consumed an organic product at least once, but only 36% consumed organic products more than once a week.

- The two regions with the highest organic consumption are Catalonia and Andalusia, accounting for 39% of the Spanish organic market in 2024.
The Basque Country was the region with the highest per capita organic purchases in 2024, while the Canary Islands recorded the lowest.

- Generation Y is the main category of organic consumers in Spain. According to a study by the Ministry of Agriculture, around 30% of organic consumers are under 35. The industry has understood this well: an increasing number of organic products aimed at young people are being launched on the Spanish market.

1- Of which 26 are in Catalonia.

According to experts, young people increase their organic purchases when they have children. Many women aged 40 to 50 also consume organic products.

- In 2024, the most consumed organic products in Spain were fresh fruits & vegetables, followed by meat, eggs and milk.

- Health and environmental protection are the main reasons for purchasing organic products among Spanish consumers.
As in other countries, price is the main barrier to organic product consumption.

Austria: A Mature organic market that continues to grow

Key Developments

- Organic products have been a long-standing trend in Austria. The Austrian organic market has more than doubled in ten years, reaching €3.139 billion in 2024, a growth of 6.0% compared with 2023[1].
The organic market share was 11.2% in value in 2024 (compared with 11.0% in 2023).

- Large retail is the main channel for organic products, accounting for 80% of the Austrian organic market in 2024 (around 30% of which was in discount stores), ahead of direct sales and organic shops (12%) and the food service sector (8%).

- In 2025, retail organic sales grew by 6.5% in value. The organic market share reached 11.9%.

Large retail

- In Austria, large retail has been strongly committed to organic products for years, ensuring a harmonious balance between supply and demand.

- Organic products are widely available and very diverse in large retail, particularly under private-label brands. All large retail chains have created their own organic private labels. In 1994, Billa launched the first organic private label, "Ja!Natürlich." Other large retail chains followed, launching their own organic private labels ("Natur pur" at Spar and "Zurück zum Ursprung[2]" at the discounter Hofer[3]).

- In 2024, organic sales in large retail grew by 5.9% in value compared with 2023. According to AMA, unlike in previous years, there were few quarterly fluctuations, indicating that organic products are no longer purchased seasonally but play an important role in shopping habits throughout the year.

1- After a 9.6% increase in 2023 compared with 2022

2- Which means "Back to the origins".

3- "Ja!Natürlich" and "Zurück zum Ursprung" often highlight the Austrian origin of raw materials, an argument particularly valued by Austrian consumers.

Organic distribution

- In 2024, organic sales via direct sales and organic shops increased by 3.2% compared with 2023.

- The share of organic products in direct sales and organic shops is very high but stable, at 22.4% in 2024.

- The only organic chain is German: Denn's BioMarkt (34 shops in 2025)[1].

- As in Germany, there are also natural food stores (Reformhäuser). There were 75 of them in 2025.

Food service sector

- In 2024, organic sales in the food service sector grew by 10.4% in value compared with 2023.

Organic consumers

- According to AMA, 98% of Austrian households purchase organic products at least once a year.
The heaviest organic buyers are mainly families with children, but also wealthy urban households and the younger generation.

- Milk, eggs, fruits & vegetables are the most popular organic products among Austrian consumers.

- The main reasons for purchasing organic products are health and regional origin. This is reinforced by the regional focus that retailers adopt in their organic marketing strategies.
Other factors, such as sustainability, combating climate change, environmental protection and animal welfare, are increasingly influencing the decision to buy organic products.

Denmark: Its inhabitants are the biggest EU organic consumers.

Key Developments

- The Danish organic market doubled between 2015 and 2024, reaching €2.7 billion. It grew by 3.5% between 2023 and 2024.
In 2024, organic products accounted for 11.6% of retail food purchases.

Large retail

- Large retail is the main channel for organic products. Coop introduced organic products in its shelves as early as 1981. Large retail (including online sales) accounted for 79% of the Danish organic market in 2024. Organic sales through this channel (including online) grew by 3.1% in 2024.

1- The two shops formerly under the German chain Basic were acquired by Denn's BioMarkt.

- An organic alternative is offered for most products sold in large retail. The vast majority of baby food products available in this channel are organic. Some stores offer only organic products for certain product ranges. According to Coop, organic products have become the standard for many Danes when choosing everyday consumer goods.

- REMA 1000, SuperBrugsen and Netto are the main organic product retailers in Denmark. REMA 1000 offers an organic range of around 400 products, while Netto's private-label organic brand includes approximately 200 references.

- All supermarket chains offer organic products under private-label brands. In recent years, the share of private labels has grown more for organic foods than for conventional ones.

Other channels

- Organic distribution hardly exists in Denmark.

- Sales at markets and farms account for only a small share of total organic sales.

- The use of organic products in the food service sector continues, with organic sales in this channel increasing by 5.7% in 2024.

Organic consumers

- 77% of Danes purchased organic products on a weekly basis in 2022.

- Urban families with children are the largest online food shoppers (particularly for meal boxes) and generally consume more organic products than the average. The two main online organic retailers are Aarstiderne.com and Nemlig.com.

- Fruits & vegetables and dairy products are the most consumed organic product categories in Denmark. In 2024, they accounted for 61% of organic sales.

- Urban families with children and elderly people without children are the main buyers of organic products. Organic consumption is more developed in the Copenhagen and Aarhus regions.

- Health preservation is the first reason for purchasing organic products in Denmark, ahead of environmental protection and animal welfare. Price remains the main barrier.

The Netherlands: A dynamic organic market

Key developments

- The Dutch organic market is estimated at €2.205 billion in 2024, an increase of 11.3% compared with 2023 and nearly double what it was ten years ago. This growth is mainly driven by volumes sold.
The organic share in large retail and organic shops reached 4.6% in 2023.

- In 2024, large retail accounted for 66% of the Dutch organic market[1], ahead of organic shops (21%) and food service (13%).

Large retail

- In 2024, organic sales in large retail grew by 13% compared with 2023. Sales of fish, bread and meat saw the largest increases.

- Their range of organic private-label products is expanding. These products also account for a significant share of organic sales in large retail.

- Albert Heijn[2], Jumbo and Plus are the main organic product retailers in the Netherlands. In 2024, Albert Heijn offered around 1,900 organic products, Jumbo around 1,250 and Plus about 1,000. Both Albert Heijn and Jumbo aim to significantly increase the organic share in their fruit and vegetable sales.
Aldi's organic private-label range included 38 products in 2023, while Lidl already offered 200 organic products in 2022.

Organic distribution

- In 2024, sales in organic shops grew by 14.8%. This increase in organic distribution was driven by higher customer traffic and a stronger online presence.

- In 2025, the Netherlands had 335 organic shops. They generally offer between 5,000 and 9,000 organic products. However, nearly one-third of the shops also include non-organic products in their assortments.

- There are three organic chains: Ekoplaza, Odin and Marqt. Ekoplaza was founded in 2000 and had around 77 shops in 2025. It plans to reach 150 shops in the Netherlands and Belgium. In 2025, its organic range included over 5,000 products.
Odin opened its first shop in 2000. It is a cooperative and had 38 organic shops in 2025. Odin offered around 7,000 organic products in 2025, including approximately 450 under its private label.
Marqt was founded in 2006 and had 10 shops in 2025. Its organic range exceeds 5,000 products.

- A number of online shops specialising in organic products and concepts for organic meal boxes have emerged over the last decade.

1- Excluding direct sales, which are not known.

2- In 1999, Albert Heijn became the first Dutch retailer to offer organic products under a private label. It aims for 10% of its private-label range to be organic by 2030.

Moreover, organic products are also included, for example, in online wine shops and standard meal box services.

- In 2024, the use of organic products in the food service sector declined by 1.7%, reaching €296 million.

- Organic products are also sold directly, through specialised retailers and in delicatessens.

Organic consumers

- In 2024, 44% of Dutch households purchased organic products at least once a month.

- Organic products are mainly purchased by households with children who have above-average incomes and by wealthy retirees.

- Fresh fruits & vegetables (including potatoes) are the main category of organic products purchased.

- The main reasons for purchasing organic products are taste, environmental protection, animal welfare and health.
Price is the main barrier to the growth of organic consumption.

Belgium: A growing organic market

Key developments

- The Belgian organic market has nearly tripled in ten years, reaching €1.286 billion in 2024 (including non-food products), an increase of 11.5% compared with 2023. The organic market share was 4.3% in 2024 (up from 4% in 2023), with 5.5% in Wallonia, 4.3% in Brussels-Capital and 3.1% in Flanders.

- In 2024, Flanders accounted for 47% of the Belgian organic market, ahead of Wallonia with over 40% and Brussels-Capital with nearly 13%. Flanders is the largest region in terms of population, with 58% of Belgium's inhabitants as of January 1st, 2024, followed by Wallonia (31%) and Brussels-Capital (11%).

- In terms of per capita spending, Flanders ranked third in 2024, behind Brussels and then Wallonia[1].

- Wallonia has more organic farmers, organic farmland and organic shops than Flanders. Brussels, on the other hand, is home to more singles, wealthy families and dual-income households, with a growing interest in organic products.

- Mass distribution remained the main channel for organic products in 2024 (48% market share by value in Wallonia and 42% in Flanders), ahead of organic distribution and direct sales.

1- In 2024, the average per capita spending on organic products was €147 in Brussels, €141 in Wallonia, and €90 in Flanders (€109 on average for all of Belgium).

Large retail

- In 2025, Carrefour offered an organic range of around 1,100 products, Delhaize around 600 and Colruyt nearly 300. Most of the organic products in their assortments are private label.

- The organic range offered in discount stores remains modest (between 20 and 60 products) compared with that of conventional supermarkets.

Organic distribution

- Organic shops are the second-largest distribution channel for organic products in Belgium.

- On average, the shops are smaller than in France. They are mostly independent or part of small chains. However, the sector is undergoing restructuring in favour of chains. The main organic chain, Bioplanet, had 39 organic supermarkets in 2025[1], with a range of around 6,000 organic products. Following Bioplanet are Färm (25 shops in 2025[2]), Ekoplaza (7) and The Barn (10).

Organic consumers

- In 2024, 98% of Walloons purchased an organic product at least once. In Flanders, 92% of Flemish people purchased at least one organic product in 2023.

- In Flanders, the most frequent organic buyers are singles and wealthy retirees. In this region, 20% of buyers accounted for 76% of total organic sales in 2024.

- In Wallonia, households with children and adults under 45 are the biggest organic buyers. In this region, 23% of households accounted for nearly 80% of organic spending in 2024.

- In Brussels-Capital, young adults and families with children are the largest buyers of organic products.

- Fruits & vegetables were the most consumed organic products in Belgium in 2024.

- Health and quality are the main reasons for purchasing organic products.

Price remains the primary barrier to growth in organic consumption, ahead of competition from other labels.

1- It belongs to a large retail chain: Colruyt.

2- Sequoia stores are gradually being rebranded under "the Färm".

Poland: the most developed organic market in Eastern Europe

Key developments

- The Polish organic market was estimated at €460 million in 2023 (excluding markets, the food service sector and the sale of fresh fruits & vegetables in large retail). The organic market share is estimated at 0.6%.

Large retail

- Large retail accounted for half of the Polish organic market in 2023.

- Its organic range, which was still quite modest a few years ago, has expanded, notably with the introduction of organic private-label products (up to 60% of a store organic range). All large retail chains have launched their own organic private labels. The chains selling the most organic products are Carrefour (2,200 organic products), Lidl and Auchan.

- Organic sales in large retail grew by 7.5% in 2023 compared with 2022. This increase is more due to higher volumes sold than to inflation.

Organic distribution

- Organic distribution is well developed, with around 700 shops in 2024. Most are located in major urban areas, but they are also beginning to appear in towns with fewer than 100,000 inhabitants.

- Many organic shops are independent. However, there are four chains: Organic Market, Organic Farma Zdrowia[1], Bio Family (supermarkets) and Carrefour Bio[2].

Other channels

- There are 150 online organic shops, including 60 without a physical store. Organic Farma Zdrowia operates an online organic shop: Organic24.pl.

- Organic products are also sold at markets. Farm sales are not common in Poland due to tax reasons. A few weekly organic markets have sprung up in major cities. The largest is the Biobazar in Warsaw.

- In recent years, some organic products have become available in grocery stores, convenience stores, drugstores and petrol stations.

Organic consumers

- Half of Polish consumers buy organic products at least occasionally.

- Polish consumers who buy the most organic products are high-income households and retirees.

1- Its main shareholder is the Italian specialised retailer Naturasì, which is reflected in its range.

2- Carrefour opened its first organic shop in Poland in 2019. It currently has four outlets.

- Eggs[1], fruit and vegetables are the most commonly purchased organic products in Poland.

- Health and food safety appear to be the main reasons for purchasing organic products.
Price remains the main barrier to the growth of consumption. Polish supply covers only 30% of the domestic market. Poland produces relatively few processed organic products.

The organic market in other EU countries

Finland: A Declining Organic Market

- In 2024, the Finnish organic market declined for the third consecutive year, falling by 4.8% compared with 2023 to reach €335 million. However, the organic market remains 49% larger than it was in 2014.
The organic market share was 1.8% in 2024[2].

- In 2024, 60% of Finns bought organic products at least once a month.

- Mass distribution is by far the main channel for selling organic products. During the 2010s, the three leading supermarket chains[3] expanded their organic ranges, especially under private labels. Both S-Group and K-Group offer a significant organic range.
The decline of the organic market in 2024 is mainly due to a drop in sales of dairy products and fruits & vegetables in large retail.
Nevertheless, other categories of organic products saw an increase in sales in 2024, including baby food, flakes, flours and dried fruits and nuts.

- There are no true organic shops. However, organic products are sold in wellness-focused shops such as Ruohonjuuri and Aito. The Ruohonjuuri chain has between 15 and 20 stores in city centres in the largest municipalities, as well as an online store. However, these shops cannot be considered as food stores, as their range of basic food products is very limited. The majority of the organic products sold there are imported.

- In 2024, the Alko monopoly offered 1,692 organic wine and spirits items, representing a 12% decrease compared with 2023.
The monopoly sold 8.8 million litres of organic wine in 2024.

- Organic products can also be found in some covered or open-air markets.

- The most committed consumers buy organic products directly from producers through a system called REKO. This concept originated in Finland and later spread to Sweden and Norway. However, it represents only a tiny share of the organic market.

1- Organic eggs are available across all distribution channels.
2- Compared to 2.6% in 2020.
3- S-group, K-group and Lidl

- The main buyers of organic products are people with higher education, residents of the Helsinki area and families with children.

- The main organic products purchased by Finns are fruits & vegetables and dairy products.

- The main reasons for buying organic products are their "purity" (i.e., fewer chemicals and additives), environmental friendliness and taste.

Price remains the main barrier to market growth, ahead of limited availability.

Czech Republic: Organic market share still modest

- The Czech organic market has nearly quadrupled in a decade, reaching €300 million in 2023, a 6.7% increase compared with 2022.

The organic market share reached 1.6% in 2023.

- In 2023, 80% of Czech families bought organic food at least once.

- In 2023, large retail[1] remained the main distribution channel for organic products, with a market share of 36%, followed by online stores (23%), drugstores (19%), organic shops and health food stores (8%), direct sales (5%) and the Food Service sector (4%).

- In 2023, organic sales remained stable in mass retail. Currently, all major mass distribution chains offer organic products. Several of them sell organic products under private labels. The market share of private label[2] products in organic sales has increased in recent years, reaching 60% in 2023 (compared with 26% for all food products).

- Online organic sales increased by 2.9% in 2023 compared to 2022. These figures also include online shops of organic producers.

- In the Czech Republic, as in Germany and Austria, organic products are also sold in drugstores such as DM and Rossmann, both of which offer organic private-label products.

In 2023, organic sales in this channel increased by 13.3% compared with 2022.

- Most organic shops do not offer only organic products but also natural and farm products, as well as gourmet food. The oldest organic chain, Country Life[3], was founded in 1991 and had seven shops in 2025, five of them in Prague. A few organic shops also have small restaurants.

In 2023, organic sales in organic shops and health food stores declined by 2.7% compared with 2022.

1- The main distributors are all foreign chains. There are nearly 2,000 supermarkets and hypermarkets in the Czech Republic.

2- Examples: Billa Bio at Billa, K-BIO at Kaufland and Tesco Organic at Tesco.

3- This chain also operates as a wholesaler of organic products, supplying the mass distribution sector.

- Direct sales of organic products declined by 1.7% in 2023, although they had grown significantly in previous years. Farmers markets have expanded, especially in major cities.
On-farm stores offering regional products, including organic food, are also developing, such as Náš Grunt, Sklizeno and Dobrej Špajz.

- The use of organic products by the food service industry increased by 34.7% in 2023 compared to 2022.

- In 2023, the main organic products sold in the Czech Republic were "other prepared foods", accounting for 39% of sales value. This category includes coffee, tea and prepared meals (including baby food). Fruits & vegetables ranked second with 27% of volumes and dairy products were third with 16% of volumes.

- Urban households with children under 49 are the biggest buyers of organic products. Prague is the main area for organic consumption.

- As in most countries, health is the main reason for consuming organic products, followed by quality, environmental protection and animal welfare.
The main barrier to the growth of organic consumption is price. In addition, the availability of organic products remains lower in rural areas than in urban areas.

Romania: An organic market largely dependent on imports

- The Romanian organic market was estimated at €250 million in 2022, with an organic market share of 1.2%. The market is growing thanks to a context of economic growth, the expansion of the organic product offering and increased consumer awareness.

- Mass retail represents the largest channel for selling organic products. Lidl and Kaufland are the main organic products sellers in Romania.
Most chains offer an organic range, including premium private-label items. The organic range in large retail ranges from fewer than 50 products at Profi to over 700 at Cora and Kaufland. Organic products are displayed in dedicated sections.

- Direct sales of organic products from the farm are growing.

- Organic shops are not very numerous and are expanding only in major cities. There are several small organic chains, such as Naturalia Bio[1], Paradisul Verde and Remedia Vert. Online organic sales are also growing.

- eMAG.ro is the largest e-commerce platform in the country. It also sells organic products. There are also online retailers specializing in organic food, offering a very wide range of products: biogama.ro, biomania.ro, naturaliabio.ro, obio.ro, rapunzel.ro, smartorganic.ro and suntbio.ro. Some of these companies package their products and sell them under their own brand.

- Romania imports between 80 and 90% of the organic products it consumes, mainly from Western Europe.

1- Nothing to do with the French chain.

- Dairy products are the main organic products sold in Romania, ahead of eggs and baby food.

- Consumers of organic products are mainly urban dwellers. Families with children are the primary buyers of organic products.
Romanian women who have worked in Western countries consume more organic products than the rest of the population.

- The main reasons for buying organic products are health and environmental protection.
The main barriers to organic consumption growth are price sensitivity, the lack of information among Romanians about the benefits of organic products and the fact that many organic products are imported.

Ireland: Organic market share still modest

- The Irish organic market was estimated at around €235 million in 2024. It has more than doubled in ten years. The organic market share was 1.2% in 2024.

- In 2023, approximately one in two consumers bought organic products every week.

- Large retail remained the main distribution channel for organic products in Ireland in 2024. It offer a good range of fresh products (eggs, dairy, meat, fruits & vegetables), but the selection of packaged organic products is more limited.
The arrival of German discounters Lidl and Aldi has had a positive impact on the number of organic products available in supermarkets.
Most chains have launched organic private-label products.

- Other distribution channels for organic products include direct sales (farmers markets[1] and on-farm sales), gourmet food stores, health food stores, organic shops and online stores[2]. Organic shops are mainly found in major cities.

- Some organic shops also operate online stores. Many gourmet food stores sell significant quantities of organic products. A few health food stores include organic items in their offerings, including fruits & vegetables.

- Major online retailers, including Amazon, offer a wide range of organic products.

- Fruits & vegetables are the most consumed organic products in Ireland.

- High-income retirees and Irish people from Generation Y are significant consumers of organic products.

1- There is a large network of farmers markets in Ireland.
2- Example: Organico

Urban dwellers, particularly residents of Dublin, tend to consume more organic products than people in rural areas due to their greater availability.

- The main reasons for buying organic products in Ireland are health, the environment (including fighting climate change) and taste.
The main barriers are the price of organic products, the limited organic ranges and insufficient consumer awareness.

Luxembourg: Rapid growth of the organic market

- The Luxembourg organic market[1] was estimated at €180 million in 2024, doubling over the past ten years.
The organic market share was estimated at 9% in 2024.

- Approximately 60% of Luxembourg households consume organic products, whether regularly or occasionally.

- Luxembourg has both small organic chains and independent shops, with a total of around thirty organic shops.
The main organic chain, Naturata, had eleven shops in 2025 and offers over 9,000 organic products.
Alavita had two organic shops in 2025. The French chain Naturalia opened two organic shops in Luxembourg. The Belgian chain Bio-Planet launched its first Luxembourg shop in 2024 and plans to open two more.

- Major supermarket chains offer organic products, including private-label items. Since the pandemic, consumers have increasingly turned to large retail, especially discounters.
The Belgian chain Delhaize offers an organic range of over 600 products.
Cactus distributes organic food from the German brand Alnatura, with over 750 products.
Lidl and Aldi have expanded their organic ranges in recent years.

- Biomarket is an online organic shop that was created in 2021, operating exclusively in Luxembourg. Its range included over 2,500 organic products by 2025.

- There are a few organic fruit & vegetable box delivery systems, such as Le Chat Biotté and Co-Labor. On-farm sales are also practiced, and community-supported agriculture groups have grown significantly. Many organic producers also sell their products at main cities markets.

- Young adults and families with children are particularly inclined to buy organic products.

- The most purchased organic products by Luxembourgers are fruits & vegetables.

- Health and environmental protection are the main reasons for buying organic products.

1- The average income in Luxembourg is the highest in the European Union.

The main barriers are price and the limited local supply, as the Luxembourg organic market is highly dependent on imports.

Lithuania: Organic consumers mainly urban

- The Lithuanian organic market was estimated at €120 million in 2020. The organic market share was still below 1%.

- In 2020, 14% of Lithuanians bought organic products at least once a week and 34% bought them once or more times per month.

- Several supermarket chains have introduced organic products into their offerings, including private-label items. In 2025, Maxima offered 1,000 organic product and RIMI Baltic had over 800. The Lithuanian organic range is expanding in supermarkets.

- Organic products are also sold at farmers markets.

- City dwellers buy more organic products than the rest of the population.

- The most popular organic products are fruits & vegetables, dairy products, bakery items, cereals and baby food.

- Health is the main reason for buying organic products.

The main barrier is a lack of understanding of what is organic, as organic products are often confused with local products. The second barrier is price.

Estonia: Organic Consumption Mainly in Urban Areas

- The Estonian organic market was estimated at €111 million in 2023, a 13% increase compared with 2022. It has quintupled over the past ten years.

The organic market share was 5.0% in 2023.

- Large retail remained the main distribution channel for organic products. It offers a large and growing organic range and all chains offer organic products. These products are often imported. The range of private-label organic products is expanding. In 2024, Rimi Baltic offered over 450 organic products.

Lidl and Aldi have significantly expanded their organic assortments in recent years.

- There is a significant number of organic shops, most of them independent. There is one chain, Biomarket, which had nine shops in 2024.

- There are approximately ten online stores offering organic products.

- Organic consumption is much higher in urban areas than in rural areas. People under 30 buy more organic products than other age groups.

- The most consumed organic products by Estonians are dairy products and cereals.

- Health and food safety are the main reasons for buying organic products.

Price is often cited as a barrier to consuming organic products, especially in rural areas where incomes are generally lower than in major cities. General knowledge of

organic farming is still relatively low. Many consumers associate local products with healthy and safe food.

Slovenia: Organic Market Still Modest

- The Slovenian organic market was estimated at €110 million in 2021, having grown 2.5 times over the past ten years.
The organic market share was between 3% and 4% in 2021.

- Organic products are sold through direct sales, in supermarkets, in drugstores and in organic shops.

- Direct sales of organic products are relatively well developed, whether on farms, at markets[1] or online. The organic producers cooperative Eko Prlekija markets its products through its online store.

- The organic range available in supermarkets is fairly well developed, but the vast majority of products offered are imported. Organic products are often sold under private labels in mass retail (Mercator and Spar). In smaller supermarkets, the organic assortment mainly consists of grocery items, while it is broader in larger stores.
Spar offers over 2,100 organic products in its largest Slovenian stores.

- Drugstores, DM and Müller, offer organic products under private label (German brands).

- People under 35 buy more organic products than older consumers. Urban residents, particularly in Ljubljana, tend to consume more organic products due to greater availability in organic shops and supermarkets.

- Fruits & vegetables are the main organic products consumed in Slovenia.

- The main reasons for buying organic products are health, environmental protection and taste.
The main barriers are price, the limited availability of local organic products and insufficient consumer awareness of organic products.

Latvia: An increasing organic supply

- The Latvian organic market was estimated at €105 million in 2019. Organic products accounted for 1.5% of retail food sales in 2019.

- Mass retail appears to be the main channel for marketing organic products in Latvia. It has been offering organic products for about fifteen years. Rimi Baltic and Maxima offer a wide organic range, including private-label items. Rimi Baltic is the

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

leading seller of organic products. However, both chains are primarily present in urban areas.

- There are a number of organic shops, most of which are independent.

- Some organic products are sold through direct sales, at markets[1], or via consumer buying groups. It is also possible to purchase organic products online.

- Organic product consumers are more numerous in urban areas. Young adults, particularly those under 25, are the most likely to buy organic products. Estonians with higher education degrees purchase organic products more frequently than others.

- The most consumed organic products by Estonians are dairy products and cereals.

- Health is the main driver for purchasing organic products. Latvians consider organic foods to be high-quality products, but some confuse "organic" with "local". Latvians are increasingly interested in local products. The second reason for buying organic products is environmental protection.
Price appears to be the main barrier to the purchase of organic products.

Croatia: consumers increasingly interested in organic products.

- The Croatian organic market was valued at €99 million in 2018 (-1% compared to 2017). In 2018, the organic market share was already above 2%.

- Organic products are sold in large retail, in drugstores, in organic shops, through direct sales (markets or community-supported agriculture groups) and online[2].

- The organic range in mass distribution has been expanding for several years, especially in fruits & vegetables. However, most of the organic products offered in large retail are imported. All major large retail chains have developed their own private-label organic range.

- The grocery chain Tommy, which has 217 shops, has developed a dedicated health section, also available on its online store, where organic products are featured, though not exclusively.

- There are two organic chains. The largest, Bio & Bio, had 25 shops and an online store in 2025. The second, Garden, has four shops. There are also small independent organic shops in almost every town.

- Young people from Generation Y are more interested in organic products than their elders.

- Fruits & vegetables represent the main category of organic products purchased by Croatians.

1- They are very popular in Latvia.

2- Several online organic shops have been created.

- Health and nutritional quality are the main reasons for buying organic products. The main barriers to organic consumption growth remain price and a lack of awareness among Croatian consumers about organic products.

Hungary: Urban organic consumers

- The Hungarian organic market was valued at €97 million in 2024, representing a 33% increase over two years. Organic products accounted for 0.6% of the Hungarian food market in 2024.

- Large retail is the main channel for marketing organic products in Hungary. Currently, all major large retail chains offer organic products, most often under private labels. Large retail mainly offers long-shelf-life organic products. Their organic range has developed significantly, particularly in fruits & vegetables, eggs and dairy products.
Spar appears to have the widest organic range with over 250 items, followed by Lidl with 200.
A quarter of large retail customers buy organic products at least once a week.

- Online[1] organic sales are growing. The website Kifli.hu offers a significant selection of organic products.

- There are approximately 600 organic shops. However, their offerings are not always exclusively organic. The largest organic shop appears to be Bio-Barát in Budapest.

- There are a few organic markets. The best-known, Ökopiac, is located in the capital. There are also a few community-supported agriculture groups selling organic products.

- The organic products most purchased by Bulgarian consumers are fruits & vegetables and baby food. However, a large share of these products is imported.

- The main consumers of organic products are residents of Budapest and its surrounding areas who have high incomes.

- Hungarian consumers primarily choose organic products for health reasons.
The main barriers to consuming organic products are price, lack of knowledge about organic products and the limited—but growing—availability of organic products in large retail. In addition, imported organic products dominate both large retail and organic shops.

Greece: Organic market share still modest

- The Greek organic market was estimated at €95 million in 2020.
The organic market share was still below 0.5% in 2020.

- Large retailers often offer organic products under their own brand.

1- Food is the main category of products purchased online.

- In 2025, Greece had 92 organic shops, the vast majority of which were independent. However, there are several organic chains. The main ones are Biologiko Xorio, with sixteen shops and Green Family, with nine. The Athens region has more organic shops than other areas.

- A number of markets offer organic products.

- Online organic sales are not very developed in Greece[1]. Restaurants and canteens offer very few organic products.

- In large cities like Athens and Thessaloniki, where access to organic shops is easier, the demand for organic products is greater.

- The main categories of organic products consumed in Greece are fruits & vegetables, dairy products and those made from cereals and legumes.

- The main reasons for purchasing organic products in Greece remain naturalness and health.
Price and a lack of trust in organic products are the main barriers.

Portugal: Supermarkets dominate organic distribution.

- Sales of packaged organic products and beverages were valued at €60.5 million in 2017. There is no overall estimate of the Portuguese organic market.

- Nearly two-thirds of Portuguese people buy organic products at least from time to time.

- Large retail is the main channel for selling organic products. In recent years, it has continued to expand its organic range, especially under private labels. The most active chains are Continente and Pingo Doce. In large retail, organic products are displayed in dedicated sections.
Lidl and Aldi have also developed their organic ranges.

- The first organic shop in Portugal, Biocoop, opened in Lisbon in 1993.
In 2013, there were around sixty small organic shops in Portugal. Since then, larger stores have appeared, sometimes featuring a bakery or butcher section, a catering service, or even a space for conferences and workshops. Organic shops are mainly located in major cities. There is now only one large organic chain, Celeiro, which has around fifty shops across the country. A smaller chain, BRIO, operates eight organic supermarkets, including two in Lisbon. There are also a number of independent organic supermarkets, particularly in the capital.

- A number of Lisbon restaurants offer organic products.

1- Sklavenitis, the main supermarket chain, only offers around one hundred organic products online.

- There are eleven organic markets, mostly located in the Lisbon region. The first one was created in 2004.

- Online sales and sales through community-supported agriculture groups are also growing.

- Consumers of organic products are, for the most part, urban dwellers. Generation Y is more interested in organic products than their elders.

- The main organic products consumed are vegetables and fruits.

- In Portugal, health and environmental protection are the main reasons for consuming organic products.
The barriers are the price difference compared to conventional products and the limited availability outside urban areas.

Bulgaria: An increasingly diverse organic supply

- The Bulgarian organic market was valued at €37.8 million in 2022 (likely underestimated), representing a 14.5% increase compared to 2021 and a fivefold growth over ten years.
The organic market share exceeded 1% in value in 2022.

- Large retail is the main distribution channel for organic products in Bulgaria, accounting for 70% of the market in 2021. All chains have developed their organic ranges, especially under private labels[1]. Most chains have set up dedicated organic sections in their stores. The Metro chain has even installed small organic shops near the checkouts.
The chains that sell the most organic products are Lidl, Kaufland, Billa and DM, although Lidl has the narrowest organic range.

- Organic distribution has existed in Bulgaria since 2006. Currently, the country has around 200 organic shops, offering a wider range of products than large retail. Some organic shops belong to very small chains, such as Balev Bio, Zoya and Zelen. A significant share of organic shops are located in Sofia.

- Online sales have become increasingly important in the organic market, accounting for 4% of the market in 2021. The main player is Ebag, which has launched its own organic private-label range.

- It is also possible to find organic products at Sofia's weekly farmers' market.

- Baby food, drinks, snack products and dairy products are the main categories of organic products sold in Bulgaria.

- Health and environmental protection are the first reasons to buy organic products.
The main barriers to consuming organic products are price and lack of trust.

1- Particularly in German chains.

Cyprus: A slowly developing organic market.

- The Cypriot organic market amounted to around €10 million in 2019, which is still modest. Although organic products are gaining in popularity, the market growth rate remains slow. About 6% of consumers regularly buy organic products. Young consumers are more interested in organic products than older ones.

- There are still not many organic shops, most of which are independent. Some organic shops have opened online shops.
With six shops across Cyprus, Etherio Bio Stores is the first fully organic chain on the island.

- Processed organic products can be found in organic shops, supermarkets and convenience stores. Direct sales take place mainly at farms. There are no restaurants offering organic products.

- Young consumers are more interested in organic products than their elders.

- Health is the first reason for buying organic products, ahead of taste.

The main barrier to the development of the Cypriot organic market is the high price of organic products compared to conventional ones[1], followed by limited local supply[2] and lack of knowledge about organic certification. The Cypriot organic market relies heavily on imports, with 80% of organic products imported.

Slovakia: Urban organic consumers

- The Slovak organic market remains modest. In 2010, it was estimated at €4 million, accounting for just 0.2% of the Slovak food market. While recent precise data are unavailable, the expansion of organic production indicates rising consumer demand for organic products.

- In 2023, 65% of Slovaks bought organic products at least once, including 39% who did so at least weekly.

- Large retail started offering organic products in Slovakia in 2003. Today, most chains have a limited selection of the most common organic products, often under private labels. Tesco and Coop Jednota offer the widest organic range.

- By 2010, there were around 100 organic shops. Like in the Czech Republic, these shops do not sell exclusively organic products. They are mainly located in Bratislava and the western, wealthier part of the country. Consumers of organic products are mostly residents of major cities such as Bratislava, Košice, Žilina, Trenčín, Banská Bystrica and Zvolen. Nearly 70% of organic product sales were concentrated in the capital region in 2010.
Fresh Market is the leading organic chain, operating 28 shops in 2025, mostly in the Bratislava area. Most organic chains also offer online shopping.

- The German drugstore chain DM also sells organic products.

1- This is due to the limited local supply and the market reliance on imports.

2- The main organic foods produced in Cyprus are cereals, olives, grapes and fruits & vegetables.

- Organic consumers are mainly residents of major cities such as Bratislava, Košice, Žilina, Trenčín, Banská Bystrica and Zvolen.
People aged 18–35 are the most likely to consume organic food.

- The main organic products consumed in Slovakia are dairy products, fresh fruits & vegetables and baked goods.

- Health and environmental protection are the main reasons for buying organic products.
Price remains the primary barrier to organic market growth.

Malta: Organic Products Available Through Various Channels

- There is indeed a local demand for organic products, but the size of the organic market is unknown.

- Organic products are sold in supermarkets, organic shops, through direct sales and online.

- The main consumers of organic products are under 35 years old and reside in urban areas.

- Fruits & vegetables and dairy products are the main organic products purchased by Maltese consumers.

- Health and environmental protection are the main reasons for eating organic.
The price and limited availability[1] of organic products are the main barriers to buying them.

1- The local supply of organic products is very limited.

Focus on organic products in food service

Actions at the European Union Level

- Organic Cities Network Europe promotes the use of organic products in public catering. It was officially launched in Paris in January 2018 and now includes over 80 cities, such as Paris, Vienna, Nuremberg and Milan[1], as well as two research institutes (Milan Centre for Food Law and Policy and Bio Forschung Austria).

- The BioCanteens transfer network is a European initiative launched in 2018 with the aim of promoting sustainable and local food in public canteens. It is part of the URBACT programme, which seeks to facilitate the exchange of good practices among European cities committed to ecological and social transition. BioCanteens aims to ensure the provision of sustainable school meals in participating cities, a key lever for developing an integrated local food approach that protects both citizens' health and the environment.

The project focuses on transferring the best practices from Mouans-Sartoux in school canteens to other European cities. This includes the daily provision of 100% organic meals, largely composed of local products, a drastic reduction in food waste—fully offsetting the higher cost of switching to organic products—and the organisation of educational activities to raise children's awareness of sustainable food. Through training workshops, study visits, peer exchanges and practical tools, member cities have made significant progress in implementing sustainable food policies.
The BioCanteens network has successfully transferred these best practices to seven other EU cities: Rosignano Marittimo (Italy), Vaslui (Romania), Troyan (Bulgaria), Trikala (Greece), Liège (Belgium), Wroclaw (Poland) and Gavà (Spain).

- The School4Changes project contributes to the increased use of organic products in collective catering. Launched in 2022, it is funded by the European Union under the Horizon 2020 programme. Its aim is to make food in nurseries and schools not only tasty and healthy, but also sustainable, through sustainable sourcing and nutrition education. The central idea is to view school meals not merely as a catering service, but as a lever for transforming the food system toward greater health, sustainability and equity.
To date, over 3,000 schools across 12 countries are already involved. In the city of Ghent, Belgium, the project has supported school food policy initiatives, including school canteens incorporating at least 20% organic products and reducing CO_2 emissions through an adjusted balance of plant-based and animal-based foods.

Austria: Vienna, Engine of Organic Collective Catering

- According to AMA, the food service sector accounted for 8% of the Austrian organic market in 2024. Organic share in Austrian food service rose to 4.2% in 2024, up from 2.7% in 2019.

- In 2024, over 500 Austrian canteens and restaurants were certified organic.

1- Also, Correns, Florence, Bremen, Lauf, Seeham, Poreč – Parenzo, Växjö and Loro Ciuffenna.

Organic products in collective catering

- The introduction of organic products in school canteens began in the mid-1990s.

- The Austrian government programme has set a target of 30% organic products in public collective catering by 2025 and 55% by 2030, along with 100% regional and seasonal sourcing. Unfortunately, the use of organic products is developing much more slowly than anticipated. This action plan[1] applies to federal institutions; however, alignment with the Länder will be carried out.

- At the Länder level, requirements have also been set for the share of organic products in collective catering.

Vienna is the driving force behind organic development in collective catering. It began incorporating organic products into public catering as early as 1998, including nurseries, schools, retirement homes, hospitals and other public canteens. In 2024, the organic share reached 50% by value in school canteens and 60% in nurseries. For public collective catering for adults, the organic share was 30% by value. Vienna has established nine green public procurement criteria—including organic share, seasonal products, use of short supply chains and level of processing—allowing collective catering establishments to be classified into three levels: bronze, silver and gold. The introduction of these criteria has not only improved food quality but also educated the public about sustainable food. The city also operates an urban farm and a vineyard, both certified organic.

Lower Austria, Upper Austria and Carinthia require a 30% organic share by value in school and nursery catering. Hospitals in Upper Austria also aim for a 30% organic share.

In spring 2021, the Salzburg government decided to set a target of 30% organic products in public canteens by 2025. In Seeham, in the state of Salzburg, nurseries and school canteens serve fully organic meals.

In Burgenland, the share of organic products in schools and nurseries reached 55% in 2024. Establishments can apply for the "Besser Essen[2]" certificate if they achieve at least 70% organic products and if the food meets other criteria such as regionality, seasonality and freshness. A programme has been launched to help kitchen managers in Burgenland introduce organic products.

- The association BIO AUSTRIA also works to promote the use of organic products in collective catering by advising school and nursery canteens and connecting them with organic product suppliers. It also offers schoolchildren and kindergarteners excursions to organic farms or classroom workshops with organic farmers.

From July 2023 to June 2027, BIO AUSTRIA, in cooperation with ZUKUNFT ESSEN, is implementing the project "Organic in Collective Catering? It's Possible! ", with support from the federal government, the Länder and the European Union.

- Several hospitals and clinics have incorporated organic products into their catering services. The majority of the 27 hospital facilities in Lower Austria are certified under the Vitalküche programme, which requires a minimum of 25% organic products.

1- Action plan for sustainable public procurement in Austria (NaBe)

2- i.e., Better Eating

- Several company canteens in Burgenland have reached very high levels of organic products, such as the Football Academy (80%), Gesundheit Burgenland (73%) and Burgenland Energie (95%).

Organic products in commercial catering

- Agritourism is fairly well developed on organic farms in Austria.

- In 2025, Austria had 12 hotels that were members of the Bio Hotels association[1].

Belgium: Organic products in all types of collective catering

- Organic products have been introduced in all types of collective catering: schools, nurseries, youth hostels, retirement homes, hospitals, administrations and universities.

- The share of kindergarten and primary school children eating a meal in the canteen is low (15 to 20%). In some schools, no hot meals are offered.

In Wallonia and Brussels

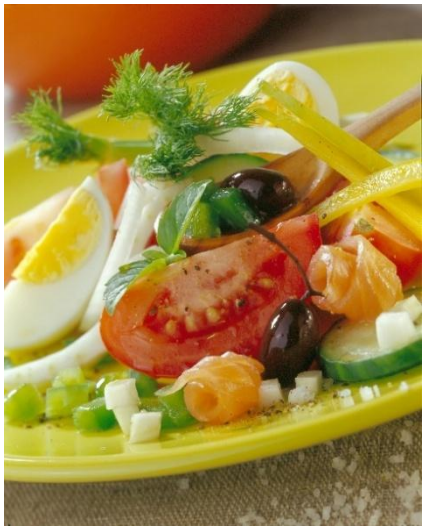
- From 2007 to 2013, organic certification in food service was voluntary, based on the private Biogarantie standard.
From 2013 to 2023, any collective or commercial catering business in the Brussels-Capital Region and Wallonia wishing to use the term "organic" in writing had to comply with the rules of this standard and obtain Biogarantie certification (four certification levels depending on the percentage of organic products).
Since 2023, the Biogarantie standard is valid only in Brussels. In Wallonia, the reference text has been incorporated into a decree by the Walloon government, with modifications compared to the previous standard. For example, certification by percentage no longer exists in Wallonia.

- To encourage canteens to implement a sustainable food policy, Wallonia launched the Green Pact "Cantines Durables[2]", a voluntary agreement for stakeholders to commit to actions promoting sustainable food offerings. Since 2019, the project has brought together numerous actors, enabling the sector to gradually transition toward greater sustainability. The initiative aims to guide canteens toward Cantines Durables certification and local sourcing within 18 months.
Currently, 199 Walloon canteens are certified as Cantines Durables, representing over 11,500 certified meals served daily. Manger Demain coordinates support for Walloon canteens in transitioning to more sustainable food, aligns projects promoting local food sourcing, supports the creation and structuring of Food Policy Councils and implements "Helping Hand" actions to increase accessibility to sustainable food for all.
Biowallonie is one of the providers offering on-site technical support and training to canteens.

1- Bio Hotels are also present in other EU countries: Germany, Greece, Italy and Slovenia.

2- i.e., Sustainable Canteens

As part of this Green Pact, direct funding has been provided to make high-quality food more accessible while fairly compensating producers and facilitating the supply of organic and local products in collective catering. The "Local on the Plate" initiative subsidizes a percentage of the cost of local products in canteens. When products are both local and organic, the subsidy rate is higher, increasing from 50% to 70%, up to a maximum of €0.50 per meal.



- In Namur, public school catering is certified as "Cantines durables" (Radish Level 2), meeting the commitment to include at least 10 organic products in its menus. Since early 2025, the introduction of organic products has also been expanding in the city's municipal nurseries.

- In 2018, the Liège City Council decided to commit to a sustainable development policy by signing the Milan Pact, followed by participation in the BioCanteens project starting in 2021. Since 2020, ISoSL, the city's collective catering organisation, has launched an ambitious project to develop sustainable food in school and nursery canteens. Around 4,000 meals are delivered daily, including 3,000 to 100 schools and 1,000 to 50 nurseries. Sourcing is as local as possible and significant efforts have been made to reduce food waste. Very high levels of organic products have been achieved in some categories: 100% for chicken and lamb, fresh fruits & vegetables and bread, between 60% and 70% for grocery products and 50% for dairy products. These changes were implemented gradually over several years, with specifications updated one at a time. Agricultural land has been made available to vegetable growers, support has been provided for the creation of a logistics structure and the construction of a vegetable processing facility is planned.

- Bio Wallonie launched the Wall'Oh BIO organic catering competition in 2022. It alternates between editions for collective catering and for commercial catering. Its goals are to share the best organic techniques and practices among chefs, serve as a unifying event promoting organic food in catering, showcase the Walloon organic product offer to the Food service sector, challenge common misconceptions about organic food and highlight and value the expertise of committed chefs.

- In Brussels, support is provided by Bruxelles-Environment to obtain the Good Food label, which also requires the use of organic products. The label was created as part of the Good Food 2022–2030 strategy. To qualify, canteens must use at least eight organic products.
Out of 1,800 Brussels canteens, 60 were Good Food certified in 2023 (serving 16,707 meals daily) and 15 more were planning to obtain the label. Nurseries accounted for half of the certified canteens but only 9% of daily meals, while administrations represented 42% of daily meals.

- It is mainly new chefs entering the profession who include organic products in their menus, while others show little intention of changing their practices.

In Flanders

- The Flemish government aims to increase the use of organic products in public procurement and industrial kitchens, targeting 5% organic in collective catering by 2027.
The Ministry of Agriculture will work on legislation regarding the use of organic products in collective catering.
Guidance will also be provided to collective kitchens.

- The city of Bruges does not have any canteens but promotes the consumption of organic products as part of its food strategy, "Bruges Tastes Better". Organic products are therefore used, whenever possible, in events organised by the city.

Bulgaria: Organic catering still in its early stages

- Until a few years ago, public canteens did not offer organic products, but their introduction has been expanding since 2021. During the 2022–2023 school year, organic products began to be included as part of the school fruit and milk programme.
Since 2024, public tenders must include a 2% share of organic products, increasing by one percentage point each year to reach 10% by 2031.

- There do not appear to be any fully organic commercial restaurants, but some establishments offer a few organic products on their menus.

Croatia: Some pilot projects

- In Croatia, a few pilot projects have been carried out to introduce organic products into school canteens.

- A certification scheme, *Eko Gastro*, has been established for commercial catering. The first fully organic restaurant in Zagreb, *Zrno Bio Bistro*, has been certified. It is part of Croatia's oldest organic farm.

Czech Republic: still modest use of organic products

- Since September 2025, a decree on school catering requires a mandatory 2% share of organic food in school canteens serving over 180 diners. From September 2028, this share will increase to 5%.

- The use of organic products in commercial catering is growing rapidly, although the market remains relatively small. It is mainly restaurants in Prague that use organic products.

Denmark: Use of organic products in public canteens since the mid-1990s

- Organic sales in food service increased by 5.7% in 2024, reaching €477 million (compared to €67 million in 2010).

Organic products in collective catering

- In Denmark, public kitchens have developed the use of organic products following the first organic agriculture development plan of 1995. To support this development, the Danish Parliament established, in 1997, a fund to support projects introducing organic products in collective catering.

- In 2000, the Dogme 2000 project was launched by three municipalities: Albertslund, Ballerup and Copenhagen (later joined by nine others). One of their goals was to provide 75% organic products (by volume) in public catering. Copenhagen even went further, setting a goal of 90% organic products by 2015[1]. This target was achieved in 2016. This was accomplished without increasing the kitchen's budget, but through training of the kitchen staff.

- The Danish government continues to financially support the training of kitchen staff, both in the public and private sectors. To help professional kitchens introduce organic products into their menus, a dedicated website has also been established. With the Danish Organic Action Plan of 2012, the conversion of public kitchens to organic was supported with approximately €12 million over the 2012–2015 period. In 2021, additional funding of €7 million was allocated for the 2021–2024 period.

- Approximately 800,000 meals are served daily in public institutions and canteens. In 2023, organic products accounted for 30% of purchases by value in public collective catering, more than double the average observed across the entire food service sector (14% in 2023 and 14.2% in 2024) [2].

- The Det Økologiske Spisemærke[3] logo was created in 2009 by the Danish Veterinary and Food Administration. It is managed and controlled by the state to distinguish establishments according to the percentage of organic raw materials used: gold (90–100%), silver (60–90%) and bronze (30–60%). The share can be calculated by value or by weight over a three-month period. An annual inspection is carried out by state authorities. In 2024, 22% of certified establishments used the gold logo, 40% the silver and 38% the bronze. Approximately 70% of Danish consumers are familiar with this logo.
In 2024, over 3,500 canteens, hospitals, daycare centres, cafés, restaurants and Danish hotels used this logo, including Michelin-starred restaurants.
Many major Danish hospitals have focused on organic products and have achieved the gold or silver organic kitchen label and more than 30 of Danish 98 municipalities have committed to converting their kitchens in daycare centres, schools and nursing homes.

1- For approximately 60,000 meals per day.
2- Compared to 13% in 2022 and 11.6 % in 2019
3- Organic Kitchen

The conversion of public kitchens to organic has shown several positive side effects, such as healthier and more climate-friendly menus with less meat and more green vegetables. This is in line with official dietary guidelines. At the same time, food waste is generally significantly reduced and the emphasis on seasonal and locally sourced agricultural products is often part of the organic conversion process in public kitchens.

Organic products in commercial catering

The introduction of organic products in public kitchens was followed by a roughly similar development in hotels, restaurants and cafés.

In 2023, the share of organic products in commercial catering (excluding fast food) was 9% by value.

Music festivals, such as the Roskilde Festival and the Northside Festival, also use the Det Økologiske Spisemærke logo. Since 2017, 90% of the food served at the Roskilde Festival has been organic and 100% at the Northside Festival.

A 2017 study by the Danish Agriculture and Food Council showed that farmers supplying Danish Michelin-starred restaurants are largely organic producers.

Estonia: Fairly recent development of organic product use in canteens

In 2022, a support programme for schools and kindergartens offering organic food was launched by the Ministry of Rural Affairs. It assists educational institutions in offsetting the higher cost of organic foods when more than 20% of ingredients used in meal preparation are organic. In addition, various awareness-raising activities about organic food are organised for schools. €1.32 million in support was provided to schools in 2023.
By the end of 2023, 153 schools and kindergartens were using more than 20% organic products.

The local government of Tartu has also promoted the introduction of organic products in nurseries and schools. By the end of 2023, the share of organic products in the city's schools already ranged from 50% to 80%, depending on the institution.

In Finland: the introduction of organic products began over 25 years ago.

Organic products in collective catering

The introduction of organic products in public catering began in 1999 with the creation of EkoCentria, aimed at promoting the regular use of organic or local products in collective catering. The goal was to support professional kitchens (public canteens, schools, etc.) in adopting more responsible practices, notably through increased use of organic and local products, improved food procurement, reduction of environmental impacts, awareness-raising and staff training.

The Steps to Organic programme began in 2002 to help kitchens increasingly use organic products. This project has grown over time: in 2024, 2,009 kitchens from the public and private sectors participated in the programme (compared with 200 in 2007 and 2,400 in 2021). Management of the programme was transferred from EkoCentria to Pro Luomu at the beginning of 2025.

The main goal of the national organic project Luomutetaan Ruokapalvelut, funded by the Finnish Ministry of Agriculture and Forestry, is to create a model for Food service to help them achieve the national target of 25% organic products. In 2024, 6% of public canteens had already reached this target. Additional subsidies are provided to canteens that use organic products.

In 2024, 63% of public canteens used organic products daily (compared with 53% in 2022). The most commonly used organic products are cereal-based items and milk. Early 2024, the share of organic products in public collective catering was on average 6% by volume[1].

Organic products are used more in daycare centres and schools than in other sectors. In Finland, meals are free in nurseries and schools.

Some cities stand out: Helsinki with 21% organic products in daycare centres, Mikkeli with 20% in daycare centres and schools, Kerava with 19% in daycare centres and schools and Porvoo with 16% in daycare centres and schools. Mäntsälä now offers 23% organic products in daycare centres and schools within a pilot area (achieved in two years thanks to the national organic project Luomutetaan Ruokapalvelut). In Porvoo as well, the share of organic products increased by 15 percentage points in one year when milk was replaced by organic milk in schools and daycare centres. This shows that a single organic product can make a significant difference.

The city of Lahti has set a target of 25% organic products in meals served in nurseries and schools. The organic share reached 3% in 2024.

University catering services are also part of the Steps to Organic programme. The organic share varies depending on the city and location. For example, in the Oulu region, the H2O (Health to Organic) restaurants have about 20% organic products. The university canteen chain, UniCafe, has incorporated organic products into its menus.

There are no statistics on the use of organic products in hospitals and nursing homes. Nevertheless, many of them use organic coffee and oatmeal.

In the private sector as well, kitchens are determined to increase the use of organic products and anticipate that customer demand for organic products will grow significantly in the future.

1- The share for 2019, presented in the previous EU publication, had been largely overestimated. The percentage given here is more reliable.

The main reasons for introducing organic products in professional kitchens are related to environmental protection, the pursuit of high-quality products and the preservation of biodiversity.

Organic products in commercial catering

Commercial restaurants with a menu[1] often use organic products, but there is not yet a fully organic restaurant. Härmän Rati, Zum Beispiel and Ravintola Base are restaurants that use a large share of organic products[2] (between 50% and 90% organic depending on the season). Organic products are also used in cafeterias.

France: Highly variable levels of organic food introduction

Organic products in collective catering

In France, the law on agriculture and food, known as the EGalim law, requires that, no later than January 1st, 2022, meals served in collective catering in all establishments providing public services (schools[3], daycare centres, universities, healthcare, social, medico-social and prison facilities, etc.) include 50% quality and sustainable products, of which at least 20% must be organic. Starting January 1st, 2024, these levels of introduction have been extended to corporate catering in the private sector.

The Ministry of Agriculture, Agri-Food and Food Sovereignty has implemented the monitoring tool "Ma Cantine[4]" for the 81,300 collective catering sites registered in 2023. It allows, in particular, the entry of organic product purchase values for catering sites. These are remote data submissions entered manually or imported from certain professional management tools in the sector. The number of submissions on Ma Cantine in 2024 for 2023 data remained low.
In its latest report to Parliament in November 2024, presenting the EGalim 2024 Statistical Review[5], the Ministry of Agriculture, Agri-Food and Food Sovereignty indicates that, for the 21% of canteens that reported their figures in Ma Cantine, the organic share is 12.1%. Two sectors exceed this average: schools and administration, although they remain below the 20% organic threshold. For 2024, "Ma Cantine" recorded a strong increase in the number of submissions (40%).

Each year, Agence BIO conducts an assessment at the wholesale stage of organic product purchases in commercial and collective catering by major product category. For collective catering, the assessment is carried out through two questionnaires: one covering the activity of generalist and specialised organic wholesalers and the other, introduced in 2025, sent to members of the National Collective Catering Association to more specifically evaluate the purchase volumes in the market managed under concession by collective catering companies. These now represent just under 50% of the collective catering market.

1- Thus, excluding guesthouses.
2- Between 50% and 90% organic depending on the season for the first, and nearly 70% for the second.
3- Schools account for 36% of meals prepared in collective catering.
4- My Canteen
5- https://ma-cantine-1.gitbook.io/ma-cantine-EGalim/rapports-du-gouvernement-au-parlement

Agence BIO estimated organic purchases at the wholesale stage in collective catering at €516 million for 2024, compared with €1.5 billion if the 20% threshold set by EGalim had been met. In 2024, the use of organic products in collective catering increased by 6.4% in value compared with 2023. Organic accounted for 5.2% of food purchases.

According to a survey by the AMF published in June 2024[1], covering preschools and elementary schools in 2023, only 18% of municipalities met the thresholds of 50% quality and sustainable products, including 20% organic, in effect since January 1st, 2022. In 2023, 37% met the 20% organic product threshold, compared with 34% in 2020. Significant differences were observed depending on the size of the municipalities. Thus, 34% of municipalities with less than 2,000 inhabitants reached the 20% threshold, compared with 75% for cities with over 30,000 inhabitants.

According to the 2024 edition of the Agence BIO/Obsoco Barometer, 42% of French people consider that the supply of organic products in corporate catering is insufficient, whether they visit the restaurant weekly or occasionally. 69% of French people are interested in organic meals at their workplace (canteen or company restaurant), 76% in school catering, 72% in hospitals, 72% in retirement homes, 65% in holiday centres and 64% in university catering.

The food cost of a meal represents only between 20% and 30% of its total cost (excluding investment expenses) [2] and between 20% and 25% for chefs participating in the "Cuisinons Plus Bio" programme[3]. According to ADEME[4], the additional cost associated with introducing organic in school canteens would be €0.08 for 20% organic products with one weekly vegetarian meal and waste reduction and €0.20 for 50% organic products with two weekly vegetarian meals and waste reduction.

Some municipalities stand out for their high share of organic products in school canteens[5], while others are still far from reaching the target set by the EGalim Law.

Organic share in school canteens:

Region	Municipalities and other local authorities	Organic share in 2024
AURA	**Caluire-et-Cuire**	45% in schools (also for medical and social services) (direct management)
	Chambéry	45% in schools (contracted catering)
	Clermont-Ferrand	46% in schools (direct management)
	Grenoble	51% in schools (also for medical and social service) (direct management)
	Lyon	58% in elementary schools (contracted catering) and 70% in secondary schools in the metropolitan area
	Saint-Etienne	75% in schools (contracted catering)
	Villeurbanne	27% in schools (direct management)

1- Survey conducted between September 1 and 22, 2023, among municipalities with a public school.

2- https://medias.amf.asso.fr/docs/DOCUMENTS/f1e075be975ccd5fb2533e1652cdf903.pdf

3- https://cuisinonsplusbio.fr/

4- https://librairie.ademe.fr/agriculture-alimentation-foret-bioeconomie/6542-couts-complets-et-recettes-financieres-de-la-restauration-scolaire-quelles-marges-de-manoeuvre-pour-la-transition-ecologique-.html

5- Over six million students have lunch in the school canteen each day.

	Drôme Department	Over 50% on average in secondary schools at the departmental level
Burgundy-Franche-Comté	**Auxerre**	24% in schools (contracted catering)
	Besançon	46% in schools (also for medical and social services) (direct management)
	Dijon	37% in schools (direct management)
	Dole	33% in schools (also for companies, secondary schools and medico-social institutions) (direct management in the metropolitan area)
	Lons-le-Saunier	35% in schools (direct management)
	Montbéliard	25% in schools (contracted catering)
	Clusiniois Community of Communes	62% in schools (direct management)
	Doubs Department	17 secondary schools with over 20%
Brittany	**Bruz**	98% in schools (also administration and medico-social institutions)
	Langouët	87% in schools (direct management)
	Lannion	64% in schools (direct management)
	Pléneuf-Val-André	34% in schools (direct management)
	Pluneret	57% in elementary schools(contracted catering)
	Rennes	41% in schools (direct management)
	Saint-Brieuc	52% en 2024 in schools (also for medical and social services)
	Saint-Malo	31% in schools (contracted catering)
	Vannes	33% in schools (direct management)
	Finisterre Department	43 secondary schools with over 20%
	Brittany Region	24% in high schools
Centre-Loire Valley	**Argenton sur Creuse**	52% in schools (direct management)
	Blois	44% in schools (contracted catering)
	Bourges	25% in schools (contracted catering)
	Buzançais	42% in schools (direct management)
	Olivet	35% in schools (direct management)
	Tours	36% in schools (direct management)
Grand-Est	**Charleville-Mézières**	21% in schools (direct management)
	Colmar	26% in schools (direct management)
	Epinal	44% in schools (direct management)
	Metz	24% in schools (also for medical and social services) (contracted catering)
	Nancy	35% in schools (contracted catering)
	Strasbourg	39% in schools (direct management)
	Toul	27% in schools (direct management)
	Troyes	22% in schools (contracted catering)
Hauts-de-France	**Cuincy**	31% in schools (direct management)
	Grand Synthe	100% in schools since 2011
	Dunkerque	31% in schools (direct management)
	Lille	60% in schools en 2023
	Loison-sous-Lens	71% in schools (direct management)
	Lys Lez Lannoy	31% in schools (also medico-social and leisure)
	Margny-lès-Compiègne	54% in schools (direct management)
	Roubaix	22% in schools (contracted catering)
	Tourcoing	25% in schools (also for medical and social services) (direct management)

	Pas-de-Calais and Nord Departments	nearly 400 daycare centres supplied with 100% organic products in Nord-Pas-de-Calais
Ile-de-France	**Argenteuil**	36% in schools (also for medical and social services) (direct management)
	Aubervilliers	35% in schools (contracted catering)
	Cergy	30% in schools (contracted catering)
	Champigny-sur-Marne	35% in schools (direct management)
	Courbevoie	28% in schools (also for medical and social services) (direct management)
	Fontenay-sous-Bois	50% in schools (direct management)
	Garges-lès-Gonesse	31% in schools (contracted catering)
	Moret-Loing-et-Orvanne	41% in schools (direct management)
	Magny-Les-Hameaux	41% in schools (direct management)
	Montgeron	45% in schools (also administration) (direct management)
	Paris Central Schools Fund (1st, 2nd, 3rd, 4th arrondissements)	69% in schools (direct management)
	Paris 9th Schools Fund	61% in schools (direct management)
	Paris 10th Schools	71% in schools (direct management)
	Paris 11th Schools Fund	50% in schools (direct management)
	Paris 14th Schools Fund	51% in schools (direct management)
	Paris 17th Schools Fund	41% in schools (direct management)
	Paris 18th Schools Fund	48% in schools (contracted catering)
	Paris 20th Schools Fund	62% in schools (direct management)
	Romainville	35% in schools (direct management) including Maryse Bastié with 88%
	Saint-Denis	27% in schools (direct management)
	Suresnes	43% in schools (direct management)
	Villejuif	42% in schools (contracted catering)
Normandy	**Alizay**	89% in schools
	Bayeux	29% in schools (direct management)
	Saint Lô	20% in schools (also for medical and social services) (direct management)
	Le Havre	19% in schools (direct management)
	Alizay	89% in schools (direct management)
	Harfleur	26% in schools s (direct management)
	Caen	30% in schools (direct management)
	Rouen	34% in schools (also for medical and social services)
Nouvelle-Aquitaine	**Agen**	22% in schools (contracted catering)
	Argenton-sur-Creuse	52% in schools
	Bayonne	57% in schools (contracted catering)
	Bordeaux-Mérignac	66% in schools (also for medical and social services) (direct management)
	Canéjean	31% in schools (direct management)
	Coulon	28% in schools (direct management)
	La Rochelle	28% in schools (direct management)
	Niort	23% in schools (direct management)
	Pessac	42% in schools (contracted catering)
	Poitiers	26% in schools (direct management)
	Dordogne Department	34 secondary schools with over 20% (direct management)

	Pyrénées-Atlantiques Department	30 secondary schools with over 20% (direct management)
	Lot-et-Garonne Department	24 secondary schools with over 20% (direct management)
	Landes Department	16 secondary schools with over 20% (direct management)
	Gironde Department	29 secondary schools with over 20% (direct management)
Occitanie	**Auch**	16% in schools (direct management)
	Cahors	16% in schools (direct management)
	Barjac	67% in schools (direct management)
	Foix	13% in schools (direct management)
	Prades-le-Lez	55% in schools (direct management)
	Millau	60% in schools (also for medical and social services) (direct management)
	Montpellier	37% in schools (direct management)
	Lagraulet-du-Gers	90% in schools (direct management)
	Narbonne	21% in schools (contracted catering)
	Nîmes	40% in schools (contracted catering)
	Toulouse	31% in schools (direct management)
	Gard Department	28 secondary schools with over 20% (direct management)
	Gers Department	19 secondary schools with over 20% (direct management)
Pays de la Loire	**Angers**	40% in schools (direct management)
	Laval	22% in schools (direct management)
	Le Mans	25% in schools (also for medical and social services)
	Nantes	47% in schools (direct management)
	Plessé	66% in schools (direct management)
	Rezé	34% in schools (direct management)
	Saint-Herblain	34% in schools (contracted catering)
	Saint-Nazaire	44% in schools (direct management)
	Saumur	24% in schools (contracted catering)
PACA	**Aix-en-Provence**	34% in schools (direct management)
	Antibes	46% in schools (also for medical and social services) (direct management)
	Arles	27% in schools (also for medical and social services and compagnies)
	Avignon	40% in schools (direct management)
	Briançon	53% in schools (direct management)
	Carpentras	43% in schools (direct management)
	Correns	59% in schools (direct management)
	Hyères	25% in schools (contracted catering)
	Marseille	27% in schools (contracted catering)
	Mouans-Sartoux	100% in schools (also daycare centres and administrative cafeterias) since 2012 (direct management)
	Nice	27% in schools (also for medical and social services) (direct management)
	Châteauneuf-Grasse	67% in schools (also for medical and social services) (direct management)
	Ramatuelle	54% in schools (also for medical and social services) (direct management)
	Saint-Rémy de Provence	90% in schools (direct management)

NB : Share of food purchases by value
Source : Agence BIO and Ma Cantine

- The introduction of organic products by municipalities is often accompanied by other measures, such as reducing food waste (e.g., Mouans-Sartoux and Dijon) or purchasing land that is cultivated organically by municipal employees (e.g., Châteauroux, Lons-le-Saunier, Orvault, L'Union, Lyon, Méricourt and Epinal).

- As for daycare centres, a few cities stand out:

  - Lyon with 100% since 2023,
  - Montreuil with 70% since 2021,
  - La Rochelle with 35% in 2023.

- Some secondary schools have reached significant organic shares, especially in Gers (over 90% on average in 2024), Paris (46% in 2024), Drôme (45% on average in 2023), Isère (38% in 2023) and Dordogne (16 schools fully organic late 2024). Several secondary schools in Lyon exceed 50% organic.

- In high schools, the levels of organic product introduction are lower, at 9.5% in 2024. However, the Brittany region stands out with an average of 22% organic products across its 112 schools in 2024. The organic share also exceeds 20% in 2025 in several high schools in Nouvelle-Aquitaine, Occitanie and Centre–Loire Valley.

- Administrative cafeterias have made efforts to introduce more organic products than the EGalim target. For example, Pau reached 28% in 2025, Lyon 26% in 2024 and Périgueux over 25% in 2023.

- The Armed Forces' food service reached 25% organic products in 2024.

- The organic share in CROUS cafeterias[1] was 8.5% in 2024 and 13,5% in 2025. Progress was strong in 2025 and some CROUS could reach 20%.

- La part de bio dans les CROUS a été de 8,5 % en 2024 et de 13,5 % en 2025. The CROUS of Aix-Marseille has exceeded 20% organic food in 2025.

- Over 800 million meals are served each year in France in social and medico-social establishments. Only 5% of the food used is organic. Some establishments stand out, however, such as the Termes-d'Armagnac EHPAD with 85% organic in 2025, the Seix EHPAD in Ariège with 40% organic in 2025, or, more modestly, the Coutances-Saint-Lô hospital in Normandy, which reached 20% organic in 2025.

- The use of organic products is also limited in the prison sector.

- In corporate catering, a few groups stand out.

- Agence BIO highlights initiatives to increase the organic share in collective and commercial catering.

1- Cafeterias from Universities

Organic products in commercial catering

- In 2024, organic purchases by commercial catering increased by 9.5% compared with 2023. In 2024, the organic market share in commercial catering was still only 1.5% by value.

- According to the 2024 edition of the Agence BIO/Obsoco Barometer, 71% of French people are interested in meals with organic products in restaurants and 59% in fast food.

- Since January 1st, 2020, the French specifications that have allowed the promotion of organic product use to consumers in commercial catering since 2012 have been modified. They now also allow a restaurant to be certified based on the share of organic products purchased. This certification is based on the value of the restaurant purchases. There are three certification levels: Category 1 covers restaurants with 50–75% of their supplies organic, Category 2 for 75–95% and Category 3 for at least 95%. These establishments must be inspected by certifying bodies and registered with Agence BIO. Unfortunately, the number of certified organic restaurants remains low, with 196 establishments, including caterers, in 2024.

- Trattino, the largest 100% organic restaurant in France and the second largest in Europe, is located in Lyon.

- In 2023, Agence BIO launched a promotion programme to develop the use of organic products in commercial catering: "Cuisinons Plus Bio". It is co-financed by the European Union. The programme aims not only to highlight restaurants but also to engage them as true ambassadors for organic farming and food. At the beginning of the second quarter of 2025, the programme included around sixty ambassador chefs. The goal is to reach 150 by the end of the programme in March 2026.

Germany: Ambitious targets in organic cities

At the federal level

- The use of organic products in university catering began in 1993 at the University of Oldenburg. Today, most of the 58 institutions in this sector use organic products and more than half are certified organic. Some offer fully or partially organic meals on a daily basis, while others organise occasional events such as Organic Week.

- The Biomentoren network was created in 2004. Its goal is to promote the introduction of organic products in collective catering. The network is coordinated by A'Verdis and currently has 18 members.

- A national initiative was launched in 2004 to develop the use of organic products in daycare centres and schools: "Bio kann jeder"[1], aimed at convincing canteen managers, educators, teachers and parents of the importance of using organic products in school catering. It is funded by the Federal Organic Farming Programme (BÖL). A national network of nutritionists is mobilised and meetings and workshops are organised to inform staff and parents. From 2004 to 2024, 1,844 workshops took

1- Anyone can do organic

place in Germany, with over 35,300 participants receiving practical advice on using organic food in daycare centres and schools.
Bio kann jeder has also published a leaflet compiling the main information presented during the workshops, an organic nutrition guide for families, an activity booklet titled "Tracing Organic Farming for primary school children" and a film on the introduction of organic products in school canteens.

- The Bio-Städte network, created in 2016, brings together 30 German municipalities[1], including 28 actual cities, and receives public financial support.
Its goal is to promote organic farming and increase the use of organic food in schools and other public institutions. These cities share their experiences and develop joint projects. Through various actions, events and measures, as well as educational work focused on organic farming and food, the network informs and motivates consumers and advises company cafeterias and caterers on transitioning to more organic food. Recently, with the help of A'Verdis and funding from the Federal Ministry of Agriculture, the network updated its practical guide to help municipalities introduce more organic products in collective catering[2].

- The information initiative "BioBitte"[3] was launched early 2020. It aims to increase the use of organic products in public kitchens to 30% by 2030. Previously, there was only a national recommendation to use a minimum of 10% organic products in school canteens. BioBitte is implemented under the Federal Organic Farming Programme. It assists policymakers, administration, procurement services and kitchen managers in increasing the organic share in public kitchens. Regional and national events are organised to share experiences and ideas and specific informational materials are provided. Food Service companies can apply for financial support for consulting and staff training.

- In 2023, a federal regulation on organic certification in Food service was launched. It includes three levels based on the organic share of purchases (by value): bronze (from 20%), silver (from 50%) and gold (from 90%). It simplifies the use of organic in catering and highlights companies that achieve at least 20% of their purchases in organic products. Around 2,500 German kitchens are already certified organic. Daycare centres and schools that prepare meals on-site for their own use are exempt from the certification requirements unless they wish to use the logo.

- In federal canteens, the target organic share is 20% by 2025 and 30% by 2030. In 2023, the Federal Ministry of Labour stood out with 40% organic products and the Federal Institute for Risk Assessment with 25%.

- In the 2030 organic strategy of the Federal Ministry of Food and Agriculture, collective catering is identified as an important area of action. It receives financial support from the Ministry.

1- List in the glossary
2- https://www.biostaedte.de/images/pdf/Praxisleitfaden_web2025_0602.pdf
3- Organic Please

- According to the 2024 nutrition report from the Federal Ministry of Agriculture, organic products still represent only 4.2% in collective catering (daycare centres, schools, company cafeterias, hospitals and nursing homes).

- According to the 2024 nutrition report from the Federal Ministry of Agriculture, 50% of respondents believe there are too few meals made with organic products in canteens and restaurants.

At the regional and local levels

- In some Länder or cities, it is mandatory to require a minimum share of organic products in calls for tenders.

Organic products in public collective catering

Local Authorities		Organic share targets	Organic share in 2023
Augsburg	School canteens	30%	4% in 2017 (not monitored since)
	Daycare centres	40%	47%
	City receptions and events		100%
Baden-Wurttemberg	All collective catering	40% by 2030	nd
Lower Saxony	Bad Pyrmont nursing home		80%
Bavaria	State-run public canteens (98)	50% by 2026	Over 50% in 63 canteens and over 30% in 22 canteens late 2024
Berlin	School canteens	60% by 2025	50%
	Daycare centres	60% by 2025	15%
	Other public canteens	60% by 2025	15%
	University catering		13% in 2020
Bielefeld	School canteens	20%	nd
Bonn	School canteens	20%	Between 10 and 13% in 2020
	Daycare centres	20%	Between 10 and 13% in 2020
	Retirement homes	30%	20% in 2020
Bremen[1]	School canteens	100% by 2026	25% in 2020
	Daycare centres	100% by 2026	40%
	Hospitals	15% by 2022 and 20% by 2025	15%
	Adult education centre		Over 90%
Darmstadt	School canteens	50%	25.6%
	Daycare centres	50%	
Dresde	School canteens		80% in 2020
	Daycare centres		80% in 2020
Erlangen	School canteens[2]	100% by 2028	Between 10% and 50% depending on the school
	Daycare centres	Over 50%	55%
Frankfurt am Main	School canteens	30%	nd
	Daycare centres	100%	nd

1- Bremen won the European Best Organic City Award in 2024.

2 - But no strategic implementation yet.

Freising	School canteens	30%	nd
Freiburg im Breisgau	School canteens	30%	30%
	Daycare centres	30%	30% (34% in 2024 and 80% in 2025)
Gießen	School canteens		100% in 2020
	Daycare centres		100% in 2020
Hambourg	School canteens	50% by 2027	10%
	Daycare centres	50% by 2027	31.5% (almost 100% in 2024 for 25 Daycare centres)
Heidelberg	School canteens	50%	10% in 2020
	Daycare centres	Over 50%	50%
Heidenheim	Clinic	30%	30%
Heinsberg	District administrative cafeteria		Over 30%
Karlsruhe	School canteens	30 à 35%	30 to 75% depending on the school
	Daycare centres	20%	At least 20%
	City hall administrative cafeteria	25%	25%
Kassel	Canteen of the Waldau Open School	100%	100%
Landshut	School canteens	30%	35%
	Daycare centres	30% by 2030	7%
	Hospitals	30% by 2030	4% in average (100% in Saintes Maries)
Lauf an der Pegnitz	School canteens		20% in 2020
	Daycare centres		20% in 2020
Leipzig	Public collective catering	30%	nd
	Daycare centres	30%	10% in 2020
München	School canteens	100%	100% in a number of establishments (e.g., Ludwig Thomas High School)
	Daycare centres	60% by 2025	50%
	City hall cafeteria	20%	27%
	Regional administrative cafeteria		25%
Münster	School canteens	20%	30%
Neuwied	School for the blind and visually impaired		50%
Nuremberg	School canteens	75%	80–100% for vocational schools and 20–34% for general education
	Daycare centres	Over 90%	75%
	Other public institutions	50%	City hall cafeteria: 33%, nursing homes and hospitals: 10%
Regensburg	School canteens	30% by à 2025 et 50% by 2030	nd
	Daycare centres	30% by à 2025 et 50% by 2030	nd
	City hall cafeteria	30% by à 2025 et 50% by 2030	nd
Stuttgart	Daycare centres	50%	44% in 2020
	Regional court cafeteria		15%
Witzenhausen	Public collective catering	Around 20%, similar to the share of UAA in organic	nd
Wuppertal	School of Public Finance		65%

Note: The shares are expressed in value.
This table is not exhaustive.
Members of the Bio-Städte network are highlighted in green.
Source: Agence BIO, based on various German sources.

- Several regions and cities have implemented programmes to develop the use of organic products in food service: pilot projects in Baden-Württemberg and Hesse, "Coaching BioRegio" in Bavaria, "Kantine Zukunft"[1] in Berlin, 2025 Action Plan in Bremen, "KANNtine" in Freiburg, "NRW Kocht mit Bio"[2] in North Rhine-Westphalia and "Mehr Regio- und Bio-Produkte in der Gemeinschaftsverpflegung"[3] in Saxony.

- Several Länder offer training for cafeteria staff, such as in Rhineland-Palatinate and Baden-Württemberg. Advice and financial support can also be provided.

Organic products in workplace catering

- Some company cafeterias have high levels of organic products on their menus, such as Allianz Trade in Hamburg (100%), Weleda (100%) and Hipp (over 90%).

Organic products in commercial catering

- According to the Forsa/Federal Ministry of Agriculture survey of May 2024, 41% of Germans consider it very important to find organic products in restaurants.

- German youth hostels have increased their use of organic products. Over 120 of the 450 youth hostels are already certified organic. At least two of them, Murrhardt and Oberstdorf, serve only organic food. Some Alpine lodges also offer organic products.

- BIOSpitzenköchen, a culinary association of top organic chefs founded in 2003, has around twenty members. Its mission is to promote high-quality, healthy cuisine in harmony with people, animals and nature.

- Several organic gastronomic restaurants have been awarded Michelin stars.

Greece: Very little organic food in restaurants

- Canteens offer very few organic products.

- There is no public standard or policy for organic products in food service, though private standards like Biokouzina exist. A very few hotels are certified.

- The use of organic products in Food service remains rare and depends solely on the initiative of the establishment's manager. The Greek luxury chain Grecotel uses its own organic products.

Hungary: developing use of organic products in food service

- The use of organic products in collective catering is developing, supported by government initiatives and local projects.

1- The future of the canteen
2- North Rhine-Westphalia cooks with organic products.
3- More regional and organic products in collective catering

- The Mintamenza pilot programme, launched in 2014 in southeastern Hungary, aimed to increase the use of local and organic products in school canteens. Supported by the Hungarian government, it brought together nutritionists, chefs, NGOs and citizens to promote healthier, more sustainable school meals. It later served as a model for similar initiatives across Hungary.

Ireland: still little organic food

- Following the 2024–2027 green public procurement strategy, the government aims for at least 10% of food purchased through public contracts[1] to be certified organic.

- The Irish Organic Association offers certification for collective catering establishments, restaurants and caterers.

- Many restaurants in Ireland include organic products in their menus; however, only one is fully organic and certified: The Strawberry Tree (County Wicklow).

Italy: early introduction of organic products in canteen

- In 2024, around 80% of Italians chose organic food in restaurants, bars and canteens.

Organic products in collective catering

- The introduction of organic products in school catering began in 1986. In 1999, a national law encouraged many municipalities to purchase organic products.

- The 2024 Italian legislation sets volume-based organic targets in school canteens by product category, including 100% for eggs, fruit juices, milk and yogurt and 70% for fruits & vegetables, legumes, cereals and olive oil.
Emilia-Romagna law goes further, requiring preschools and elementary school canteens to favour organic products when available.

- In 2020, the Ministry of Agriculture set up a €10 million fund to promote the use of organic products in school canteens[2]. Unfortunately, the fund was reduced to €5 million in 2024 and €4.6 million in 2025[3].
This fund goals are to help reduce costs for families and to implement information and promotion activities in schools. For example, in Piedmont, organic promotion activities for school catering staff and teachers are organised over three years.
In 2024, 86% of the fund was allocated to the regions, while 14% was reserved for promotion and educational activities.

- Many Italian cities have high levels of organic product use in school canteens. Several municipalities achieve 100% organic for multiple products categories.

1- This measure applies in particular to school cafeterias, hospitals, and prisons.

2- Over 2.6 million children eat daily in Italian school canteens. .

3- It is projected at €3.8 million for 2026.

Organic products in Italian public school canteens

Organic share by volume

- **Between 30 and 49%**
- **Between 50 and 79%**
- **Between 80 and 99%**

Source: Agence BIO based on various Italian sources

- Organic products are used more in schools than in other collective catering. Some hospitals, such as Villa Salus in Venice, have also introduced organic products.

Organic products in commercial catering

- The use of organic products is growing in commercial catering. Nearly 70% of Italian restaurants offer organic products. Two private labels exist: 100% Bio Gourmet for exclusive use of organic ingredients and Menù Bio Gourmet for menus or specialties containing at least 70% organic ingredients[1].
Organic products are also widely used by non-certified restaurants.

- A 2025 survey conducted by Nomisma/Observatorio Sana found that 68% of Italians consider the presence of organic products in restaurants essential. This trend is confirmed by a 2023 survey by The Fork, which found that 56% of Italian consumers prefer restaurants that adopt sustainable practices, including the use of organic products.

- Agritourism is very well developed in Italy, with 1,440 organic farms practicing it in 2023.

Latvia: recent development in public canteens

- There is an organic certification for restaurants, overseen by the government. Dishes, menus, or the entire establishment can be certified at three levels[2]. The presence of organic products in restaurants remained fairly limited in 2024, as restaurateurs' interest in organic products is still low.

- Government regulations on green public procurement stipulate that in all public canteens, at least 50% of milk and kefir must be organic and at least 20% of cereal products. The Latvian Organic Farming Association (Latvijas Bioloģiskās lauksaimniecības asociācija) is currently promoting the inclusion of other product groups and increasing the organic share of the groups already covered.

Lithuania: Organic products in a number of nurseries

- Lithuania has regulated organic catering since May 2009, introducing a national standard and a voluntary control system. In May 2021, new legislation was launched revising the labelling and control rules for organic collective catering. Certification remains voluntary, allowing genuinely motivated businesses to obtain it without discouraging other operators from including organic products in their menus. In 2024, two commercial restaurants and eight daycare centres were certified organic.

- A government decree of April 30, 2019, aims to encourage the consumption of high-quality processed food products in early childhood education institutions.

1- A website, www.gourmetbio.it , has been created.
2- 20-50%, 50-80% or 80-100%

- Since 2023, the National Payment Agency has offered funding to preschools to offset the cost difference when they include organic or other high-quality products in their menus.

- Since 2025, daycare centres and schools can apply for financial support for organic certification.

- 70 daycare centres used organic products in 2023. Organic products have also been introduced in retirement homes and hospitals.

Luxembourg: Organic products in all school canteens

- The goal is to reach 20% organic products in public collective catering (schools, universities, daycare centres, retirement homes and hospitals) by 2025.

- In the 112 school and university restaurants and canteens in Restopolis, the organic share reached 17% in 2023. Restopolis also offers one 100% organic dish daily in all its school and university restaurants.

- The use of organic products was extended to all school cafeterias at the start of the 2024 school year through the Supply4Future programme.

- Several restaurants offer organic products and some are entirely organic.

The Netherlands: still a modest share of organic products in Food service

- Organic products in food service began to gain traction in 2014, but the sector still lags behind the rest of the Dutch market. Its organic market share is estimated at just 1–2% and the organic range offered by wholesalers remains relatively limited.

- There is no public organic certification for restaurants and cafeterias, but the EKO Quality Mark Foundation has created a private certification based on the Danish model, with three levels.

- The most commonly used organic products in food service are bread, dairy products, eggs, meat, tea, beverages and dry grocery items.

- Promoting the use of organic products in food service was part of the organic action plan launched at the end of 2022. The Food Service Institute was commissioned by the government to analyse opportunities for organic products in food service market. A pilot project, requested by the Ministry of Agriculture, demonstrated how 25% organic products could be achieved in government catering. The previous Dutch government had planned to set minimum organic criteria for its own cafeterias and caterers and to develop an organic label for the food service market. However, this was not implemented and the government changed in 2024.

- In Amsterdam, businesses, the municipality, healthcare institutions and universities signed an agreement in 2025 to make their canteens healthier and more sustainable. One of the goals for 2030 is to achieve at least 25% organic food.

Poland: still very little organic food in Food service

- Thanks to the European Biocanteens project, organic products were introduced into school catering in Wroclaw[1] in 2021. Some schools in the municipality serve 100% organic meals.

- PIŻE, the Polish Chamber of Organic Food, supports the introduction of organic products in schools and other public institutions.

- Restaurants offering organic products are rare.

Portugal: Two private specifications

- Two private standards have been approved by the Ministry of Agriculture for the use of organic products in collective catering. These standards apply to seven establishments located in the municipalities of Lisbon, Oeiras and Matosinhos. These establishments serve meals composed of at least 70% organic products.

- The 2017 national strategy for organic farming calls for the introduction of organic products in canteens.

- The Organic Canteens pilot project was launched in a few schools during the 2018/2019 school year to introduce organic products into public school canteen menus and raise awareness among students, staff and families about the benefits of organic food. It involved five schools in Lisbon and five in Loures. Although the project ended in December 2021, it served as a model for similar initiatives, such as Idanha-a-Nova's[2] programme offering 100% organic school meals. The Ministry of Agriculture also introduced a canteen classification system based on organic product use, encouraging other schools to follow suit.

- Several restaurants include organic products in their menus, such as Bio Restaurante Vegetariano and Prado, both located in Lisbon.

Romania: no organic products in canteens

- There is no organic certification for canteens and restaurants.

- Organic products have not been introduced in public canteens, but some commercial restaurants in Bucharest and other major cities use them.

Slovenia: A recent development

- Early 2019, the Slovenian Ministry of Agriculture decided to promote organic farming to increase the use of organic and local products in public institutions (schools, kindergartens and hospitals).

1- Town from Silesia

2- It was recognised as Portugal's first Bioregion in 2024.

- A law stipulates that organic share in public institutions must be 15%. It is currently at 13%. Institutions face difficulties sourcing local organic products.

Spain: Andalusia, pioneer of organic products in school canteens

At the national level

- Under the Ministry of Consumer Affairs' school food procurement programme[1], there is a sustainability criterion stating that at least 5% of the food offered in Spanish school canteens must be organic, with the percentage to be gradually increased based on the number of hectares under organic farming.
However, the decree making this 5%[2] organic requirement mandatory for schools and secondary schools and high schools was only published in 2025. Until then, compliance with this target was limited.

- Several companies use organic products in their canteens, including Inditex. Two catering companies, PlenEat and Tapería Orgánica, specialised in organic meals for businesses.

In the autonomous communities

There are initiatives to introduce organic products in collective catering in several regions.

- Menjadors Ecològics is a non-profit association that seeks to promote the use of local organic products in canteens. It operates in several autonomous communities.

- Andalusia is a pioneering region. The introduction of organic products in collective catering began there in 2005 with the Eco Alimentación programme, which aimed to increase the consumption of organic products in schools, hospitals and prisons. This effort continued over the following decade with Andalusian organic plans.

Late 2021, a general collaboration protocol was renewed between the Ministry of Agriculture and the Ministry of Education of the Andalusian government to promote the consumption of organic food in public school canteens in Andalusia for at least four years. Information campaigns were organised for catering companies and organic product suppliers.
In 2024, the Andalusian Ministry of Agriculture announced that the Andalusian government would support the creation of a network of local organic municipalities through the law promoting organic production.
In 2024, approximately 5,200 tonnes of organic products were consumed in Andalusian school canteens (around 1,458 schools). 17 Andalusian school catering companies supply organic products. The most commonly served organic products in Andalusian canteens include tomatoes, fruits, bread, potatoes, other vegetables, legumes and rice. The vast majority of the organic products served are local.
In Seville, nearly 15,000 students consume organic products in school canteens.

1- This is part of the official National Food Chain Control Plan 2021–2025.
2- 5% of monthly purchases by value. This represents two meals per month.

In 2025, several Andalusian hospitals[1] and two retirement homes offered organic products.

- In Aragon, since the start of the 2024 school year, the use of organic and local products in school canteens has been further encouraged. The organic share in public school canteens reached nearly 5% in 2025. Organic fruits & vegetables have been introduced into the menus.

- In Asturias, there is a network of organic school gardens, promoted by the Council for Organic Agricultural Production of the Principality of Asturias[2], whose main goals are to spread knowledge about organic farming and its benefits in educational centres and to promote the gradual incorporation of organic and local food into school canteens. This initiative was launched as part of the Strategy for Nutrition, Physical Activity and Obesity Prevention[3].
Asturias aims to meet the 5% organic target in school catering.

- In the Balearic Islands, the first attempt to implement a strategy for supplying school canteens with organic products was launched in 2008, but it only truly succeeded in 2019.
In 2025, the organic share in public school canteens was around 16%.

- In the Canary Islands, the Food Act in Schools has promoted the use of organic products in school catering.
The Eco-Comodores programme, launched in 2013, encourages school canteens to use local organic products. Educational materials have been developed. Participation is voluntary. In 2024, 116 schools and 111 organic producers were involved in this programme.

- The Eco-Comodores programme has also been implemented in Cantabria. At least four schools in Santander have introduced organic products in their canteens.

- In Castile and León, the integration of organic products in school canteens is progressing slowly. Several secondary schools in Valladolid use organic products.

- In 2023, the regional government of Castile-La Mancha announced that it would give preference to companies offering menus with organic products in tenders for school canteens and socio-health centres.

- Initiatives have also been taken in Catalonia with public and private support. Barcelona, a signatory of the Milan Pact since 2015, has increased the organic share in primary school menus by rewarding suppliers based on the quantity and variety of organic products offered. The city's 68 nursery schools began introducing organic products in September 2019. During the 2023–2024 school year, a network of 105 schools in Barcelona (8,500 students) offered 95% organic products in their menus.
The Barcelona 2021 World Capital of Sustainable Food project led to the promotion and development of over 90 projects and 200 activities related to sustainable food.

1- Including Virgen de las Nieves University Hospital (Granada) and Virgen del Rocío University Hospital (Seville)
2- COPAE
3- NAOS

A logistics centre, Ecocentral, was created to supply school canteens with organic and local products. It currently serves 88 schools.
XAMEC (Agroecological Network of School Canteens in Catalonia) brings together 32 schools where organic and local products have been introduced.
Ecolocal is a state certification for school canteens, restaurants and public institutions that recognises the incorporation of organic and local products.
In June 2024, the Barcelona hospital and Veritas[1] signed an agreement to introduce organic products into patient menus.

- As part of the Ecocomedores Extremadura initiative, launched in 2021, organic products are used in eight school canteens in Extremadura, serving 500 people. Technical support is provided to help canteens adapt.

- In Galicia, the EcoComedores project, which promotes the use of local organic products in school canteens, was launched in February 2023. It includes training for educational staff and collaboration with local producers to incorporate organic products into school menus.

- Since the start of the 2023 school year, the UNIalimenta project aims to promote the use of local organic and agroecological products in university canteens in Madrid. Seven university canteens are involved. Three webinars have been organised for the Madrid university community and meetings have been held at several universities. In addition, students, faculty, researchers and administrative staff interested in organic products can purchase them on campus for home consumption.
In Madrid's preschools, some of the products served in canteens are entirely organic, including olive oil, certain legumes and vegetables, pasta, rice and yogurt.

- Several schools in Murcia have introduced organic products into their menus.

- In Navarre, organic products account for 90% of the ingredients used in the canteens of eleven nursery schools in Pamplona, thanks to the Hemengoak – De Aquí project. Organic foods are also included in meals delivered to elderly residents at home.
The University Hospital of Navarre also uses locally sourced organic products.
Several associations, such as Ekoalde and JanGela, play a key role in promoting the use of organic products in both public and private canteens.

- In the Basque Country, a project has been launched to incorporate organic and locally farmed products into school cafeteria menus.

- In La Rioja, several school canteens have incorporated organic products into their menus, supported by initiatives such as the "Alimentos Ecológicos en Centros Escolares" programme launched by the Consejo de la Producción Agraria Ecológica de La Rioja (CPAER).

- In the Valencian Community, the organic share in public school canteens was still below 3% in 2025.
In Valencia, Menjadors Ecològics and the municipality have developed a public procurement guide to promote sustainable practices.

1- Chain of organic shops

In nursery school cafeterias in Valencia, 100% of oranges and tangerines are organic and 50% of the vegetables are organic.
The Horta Cuina programme supplies 48 schools in the Valencian Community with fresh, organic products.

Organic products in commercial catering

- A number of restaurants use organic ingredients in their menus.

- There are a few organic restaurants in Spain, notably in Madrid, Barcelona and Seville.

Sweden: A decline in recent years

Organic products in collective catering

- Sweden is the country with the highest organic share in public procurement. Until 2023, the public target set in 2017 aimed to introduce 60% organic products by value in all municipalities by 2030 (including nursery and primary schools, hospitals and other public institutions). The current government has decided to remove this target. Unfortunately, the national average of organic products in public canteens has been declining for several years. In 2024, it was 33.7%, compared with 34.2% in 2023[1]. For several years, some managers have placed more emphasis on using local products rather than organic foods.
In 2023, 90 municipalities had a share above 30%.

- Schools lead public collective catering in the use of organic products. In 2023, the organic share was 48% in nursery schools, 42% in primary schools and 35% in high schools.

- In 2023, Örebro was the municipality offering the highest share of organic products in public collective catering at 67.3%, although this represented a decrease of 2.7 points compared with 2022 (70%). Four other municipalities had also already exceeded the 60% target: Borlänge (64.5%, down 3.5 points from 2022), Malmö (61.9%, down 7.1 points from 2022), Orust (61.7%, up 1.7 points from 2022) and Lund (60.7%, down 2.3 points) [2].

Hospitals do not fall under the authority of municipalities and are therefore not included in the organic shares reported by the municipalities.

- In Malmö, the main reason for the decline in the use of organic products was the shortage of organic supplies on the market (linked to the decrease in the number of organic producers in recent years), combined with a rise in food prices.
Other municipalities, such as Västerås[3], have also reduced their purchases of organic products due to budget cuts.

1- Compared to 37 % in 2022, 38 % in 2021 and 39 % in 2019
2- Stockholm had 49.7% organic products in 2023 (almost stable vs 2022), ranking tenth among Swedish cities.
3- This municipality uses just over 40% organic products, compared to 60% a few years ago.

- Some local authorities had set their own targets. In 2017, 88% of municipalities had organic procurement goals, but by 2020 this share had fallen to 67%.
In Uppsala, the development target is currently under review[1].
In Malmö, there has been no clear municipal target since 2020, but the political committee of the department responsible for school canteens still maintains an 80% organic target for school meals.
In Lund, which topped the rankings a few years ago, the city council decided late 2019 to eliminate the municipal target of 100% organic food, leaving the city without any organic procurement goals.

- Some municipalities have their own organic farms, which makes local sourcing easier.

- Overall use of organic products in canteens remained almost stable in value in 2024 compared with 2023, with a slight decrease of 0.2%.

Organic products in commercial catering

- Organic sales in restaurants declined by 2.8% in 2024 compared with 2023.

- The organic share in commercial restaurants was estimated at 7.3% by value for 2024.

- Since 2012, all restaurants on trains have offered organic menus and many hotels serve only organic coffee and milk.

- In 2013, KRAV launched the "Restaurant for 1,000" project to increase the number of certified organic restaurants and caterers.

- An app to identify nearby restaurants with more than 25% organic products was launched in 2019.

- Two transport companies have introduced organic products and are certified: Scandinavian Airlines and the boat company Stromma.

1- Uppsala was approaching 60% organic food in collective catering in 2024.

Conclusions on organic consumption

- The EU organic product markets show an overall growth trend, although with variations between countries. Despite the effects of the pandemic, inflation and the war in Ukraine, organic consumption continued to rise in the majority of member states, driven by increasing demand for healthier and more sustainable food.

Common features across many EU countries

- Health is the main reason for purchasing organic products in many countries.

- Price remains the main barrier to purchasing organic products in all countries, regardless of the market level of development. In 2023, EU organic consumers tended to choose a cheaper version of the same product, turning to private-label brands and discount retailers.

- Organic distribution is far more developed in the EU than in the rest of the world. Nevertheless, mass retail remains the main channel in almost all countries. In recent years, it has accounted for the largest share of growth in the EU organic market. Most EU large retail chains now offer organic products under their own private labels. They are investing in organic both to meet market demand and to enhance their image.

- The use of organic products in food service has grown in many EU countries.

- Young people, especially Generation Y, consume more organic products than older generations. They are often the driving force behind the growth of the organic market. Families with children are also significant consumers of organic products.

- Local origin is a very important criterion, often taking priority over organic certification.

- Fruits & vegetables, dairy products and eggs are the main organic categories throughout the European Union.

- An increasing number of consumers are vegetarian or vegan. In many countries, the number of people choosing a vegan diet for environmental reasons has risen. This growth in vegetarianism and veganism can have a positive impact on organic consumption, or, conversely, lead to a decline in organic sales, as seen in Sweden.

- The organic label faces competition from many other food labels with ethical or sustainability attributes.

Differences between EU countries

- Knowledge of organic products varies greatly between Western and Northern Europe and the Central and Eastern countries, where it is generally much lower.

- The most mature markets (Germany, France, Austria, Denmark) are characterized by a diverse product range, structured distribution and a strong presence of organic in food service, while emerging markets remain more dependent on imports and have a limited local supply.

- The share of organic distribution varies widely: it remains significant in France and Germany but is marginal in the Scandinavian countries.

- Price sensitivity is stronger in Central and Eastern European countries, where organic products are still perceived as a "niche" item.

Key success factors

The main drivers of the organic market are:

- A wide organic range in large retail, including fresh and processed national products and even local products, supported by an effective marketing strategy[1],
- The development of organic private-label products where this is not yet the case,
- A local organic supply, ensuring traceability and proximity,
- The development of the organic agri-food sector to also expand the local supply of processed organic products[2],
- Education and awareness-raising for consumers about organic products, including children,
- The expansion of organic product use in collective catering,
- Public support for the organic sector.

The main drivers for the use of organic products in collective catering are:

- The setting of quantified targets,
- Public support combining technical guidance, training for kitchen staff and financial incentives,
- The sharing of experiences between pioneering regions and emerging areas.

What developments for the EU organic markets?

- The future growth of the EU organic market will depend on the evolution of organic farmland (some countries have seen a decline), the structuring of supply chains, the development of organic processing facilities, the expansion of organic ranges in distribution channels and, of course, on consumers themselves.
The growth of farmland and downstream development are closely linked to public policies that will be implemented in the coming years, both at the EU level and within individual countries. Promoting organic products will remain essential to improve consumer awareness.

- The restructuring of EU organic distribution is expected to continue.

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

1-Example: In Germany: agreements with private specifications. In Denmark: communication in stores and organic alternatives offered for most products sold.

2- Some EU countries export raw organic products and import processed ones. Furthermore, some products are not available in organic even though they are produced locally using conventional methods.

Exchanges of organic products

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

Main features

- A significant share of organic products trade takes place within the European Union.

- Due to the lack of large-scale processing facilities comparable to those in some Western countries, many Eastern EU countries still export a significant share of their raw organic products to other EU member states, particularly Western Europe and import processed organic products in return.

- Organic products still account for a small share of agri-food exports in most EU countries: 1.8% in Denmark in 2024, 2% in Sweden in 2023, 3% in Finland in 2022, 6% in Italy in 2023 and 6.95% in Spain in 2024.

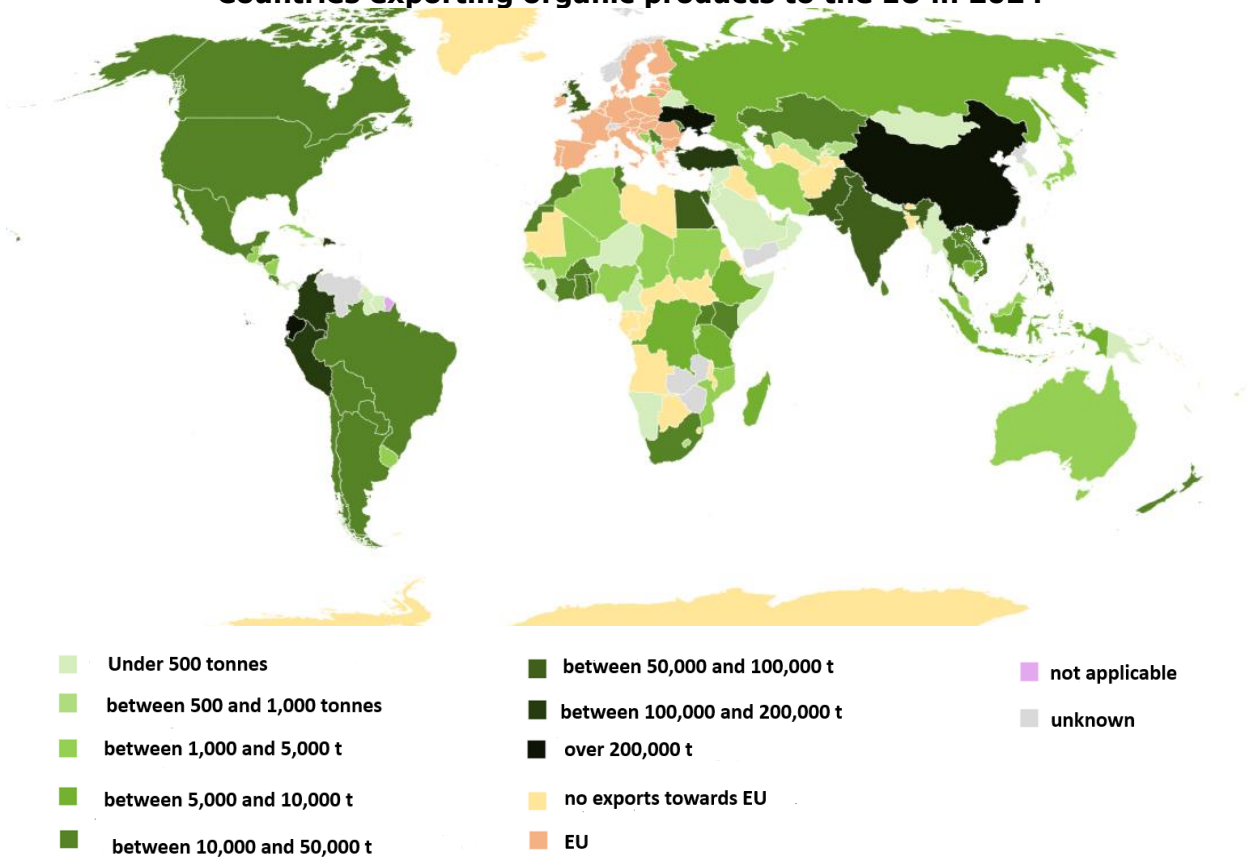
Imports of organic products

EU global organic imports from third countries

- Since October 2017, the COI inspection certificate accompanying each shipment entering the EU has become electronic. In addition to improving the traceability of organic shipments from third countries, the system has enabled the collection of data and the creation of a database on organic product imports: TRACES. The data collected are available in volume.

- In 2024, 117 countries exported organic products to the European Union.

Countries exporting organic products to the EU in 2024

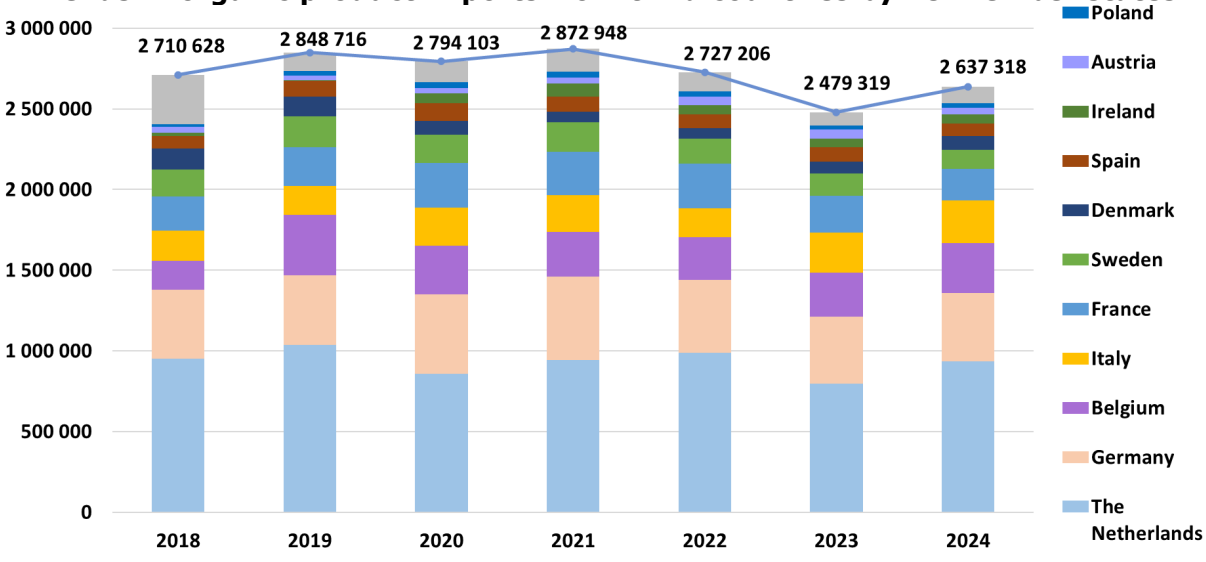


Source: Agence BIO based on TRACES

Organic volumes imported by the EU

In 2024, the EU imported 2.64 million tonnes of organic products from third countries (excluding Switzerland and Norway), an increase of 6.4% compared to 2023, but a decline of 2.7% compared to 2018.
The increase compared to 2023 reflects a rebound in demand for organic products.

Trends in organic product imports from third countries by EU member states



Source: Agence BIO based on TRACES

- Organic products accounted for 1.6% of agricultural imports from third countries in 2024[1].

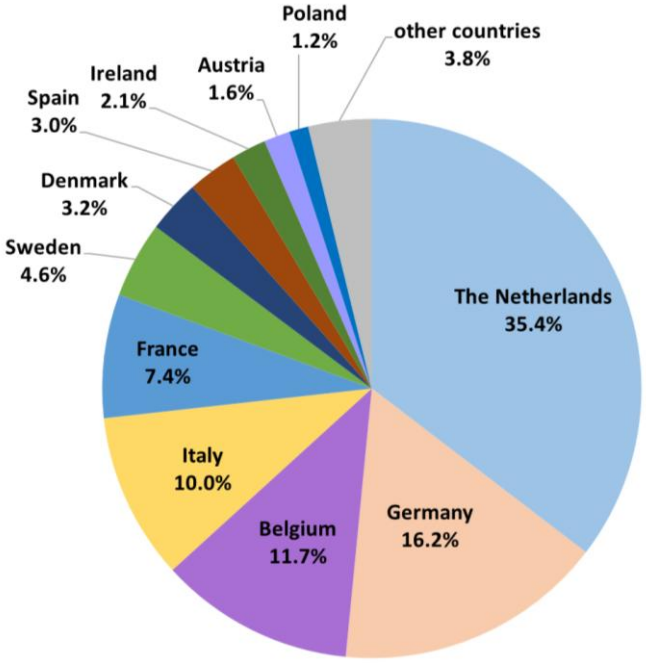
Ranking of Member States according to the volumes of organic products imported from third countries

- In 2024, the three main EU member state importers of organic products remained the Netherlands (35% of the volumes), Germany (16%) and Belgium (12%).

- These three countries saw an increase in their organic imports compared to 2023, with +17.3% for the Netherlands, +2.2% for Germany and +12.9% for Belgium[2].

- Italy moved up to fourth place in 2024, surpassing France. Italian organic imports by volume increased by 6.1% compared to 2023, while France's declined by 14.3%[3].

Distribution of organic product imports from third countries by volume in 2024



Source: TRACES

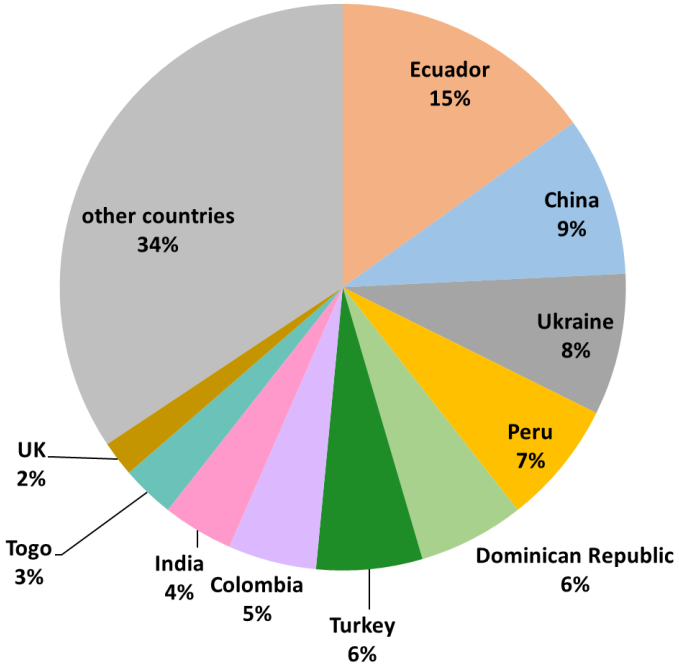
- In 2018, the Netherlands already accounted for 35.2% of the EU organic imports and Germany for 15.8%. France was then in third place, with 7.9%[4].

1- The highest shares were for confectionery and chocolate (9.8%), olive oil (8.4%) and fruits (6.6%).
2- Belgium is the only one of the three whose organic imports increased compared to 2018 (+73%).
3- to 2018, the change was +42% for Italy and -8% for France.
4- More information by country is provided in the following chapter.

The main exporters of organic products to the European Union

In 2024, Ecuador remained the leading of organic products to the European Union in terms of volume, with a 15% share. It was followed by China (9%), Ukraine (8%), Peru (7%) and the Dominican Republic (6%).

Distribution of EU organic imports by volume in 2024, by country of origin



Source: TRACES

Ecuador increased its organic exports to the European Union by 9.9% in 2024 compared to 2023, with growth reaching 48.4% compared to 2018.
In 2024, fruits accounted for 94% of Ecuador's organic exports to the EU, consisting mainly of bananas[1].

Chinese organic exports to the EU rose 19.4% in 2024 from 2023 but were down 27.7% compared with 2018.
Oilseeds and protein crops made up 68% of these exports, while exports of nuts and spices nearly doubled in 2024.

Ukraine's organic exports to the EU rose 17.4% in 2024 from 2023, driven by oilseed (+23%) and cereal (+8%) exports, but remained 22.2% below 2018 levels.
Cereals made up 41% of exports and oilseeds and protein crops 38% in 2024.

Peru's organic exports to the EU rose 4.4% in 2024 from 2023 but were down 4.8% compared with 2018. Fruits represented 58% of exports, while coffee, tea, cocoa and spices accounted for nearly 35%.

The Dominican Republic's organic exports to the EU fell 12.1% in 2024 from 2023 and 3.9% below 2018 levels.

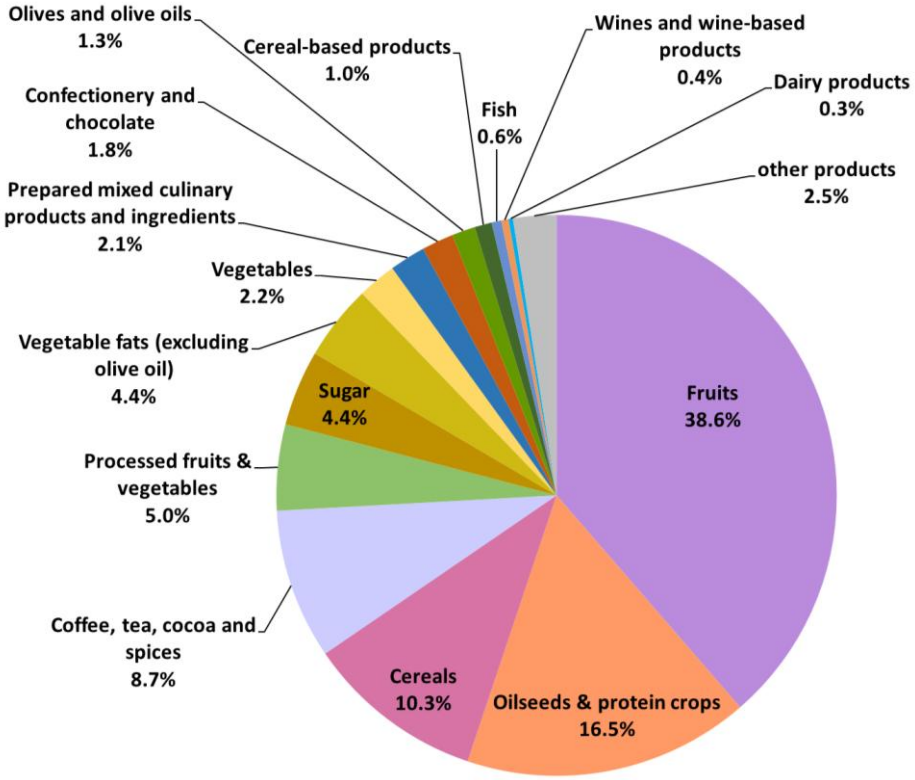
1- Organic banana exports from Ecuador to the EU rose 10% in 2024 compared with 2023.

Fruits made up nearly 94% of exports. The fall in organic exports is primarily driven by a 12% decrease in organic banana shipments.

Imports of organic products by category

Fruits[1] were the largest category of organic imports in 2024, accounting for 39% of the volume (1,018,758 tonnes), up 7.3% from 2023 and 27.5% from 2018. Nuts (+26%) and bananas (+4.5%) saw the strongest growth. Bananas, with around 353,400 tonnes, represented 34.7% of organic fruit imports[2] and 13.4% of total organic imports.

Distribution of EU organic imports by volume in 2024

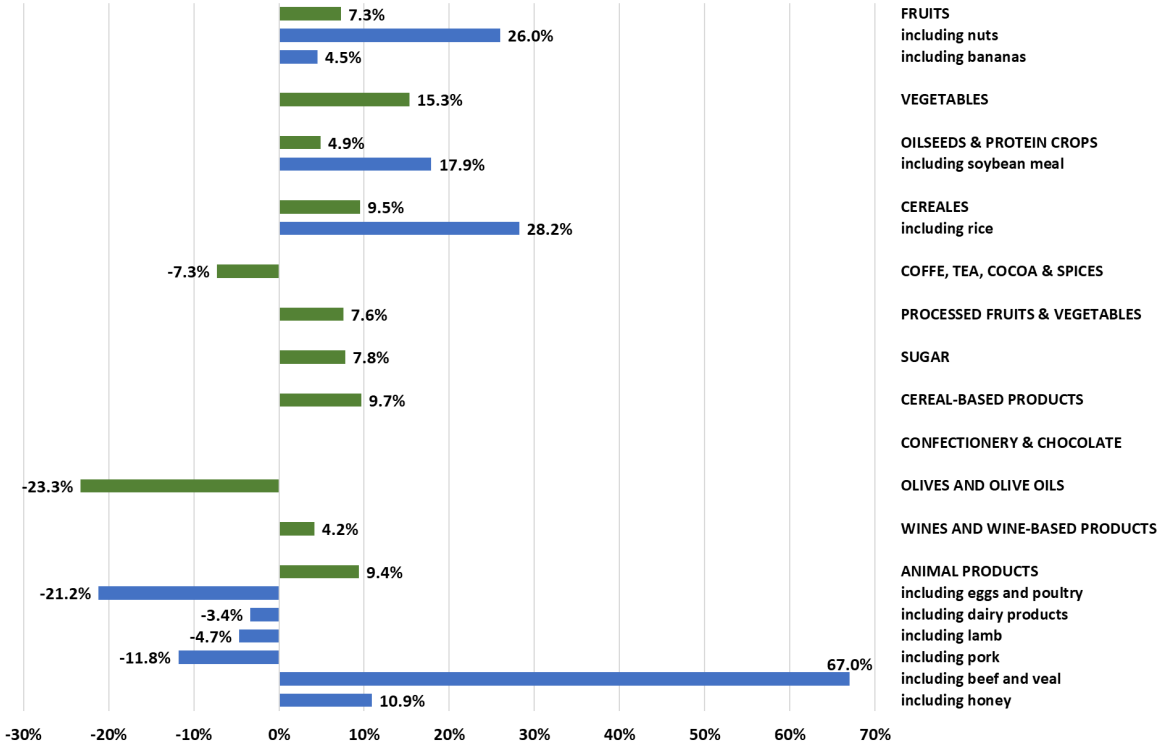


Source: Agence BIO based on TRACES

The rise in organic imports is primarily driven by increased imports of organic fruits & vegetables (bananas, nuts, tomato products and juices), rice and oilseeds. By contrast, organic imports of olive oil, coffee, cocoa beans, maize and soybeans decreased.

1- Including nuts and fresh and dried fruits
2- And 13.4% of total organic imports

Evolution of organic imports by volume by category between 2023 and 2024



Source: Agence BIO based on TRACES

Imports of organic products by country

- This includes organic imports from both third countries and other EU member states.

The Netherlands

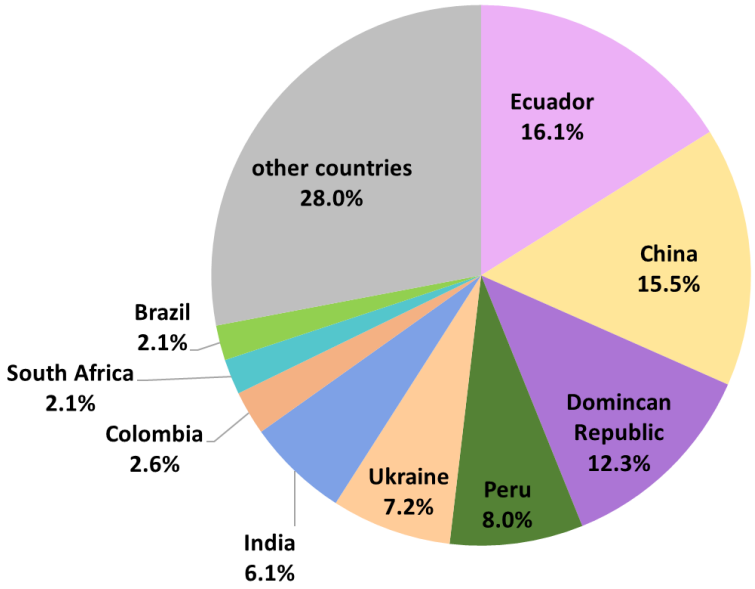
- The Netherlands imports organic products from the EU and third countries and re-exports a large portion, especially fruits & vegetables.

Imports from third countries

- In 2024, organic imports from third countries rose 17% from 2023 to 933,370 tonnes but remained 2.1% below 2018 levels.

- Ecuador accounted for 16.1% and China for 15.5% of organic imports by volume from third countries in 2024.

Distribution of organic imports by volume from third countries into the Netherlands in 2024.



Source: Agence BIO based on TRACES

- In 2024, Ecuador exported mostly bananas to the Netherlands (93.9% of volumes). China's exports consisted mainly of oilseed and protein crop meals (71%) and ginger (11.8%). Bananas accounted for 94.8% of the Dominican Republic's organic exports to the Netherlands by volume.

- Fruits made up 43.8% and oilseeds & protein crops 16.5% of the Dutch organic imports from third countries in 2024.

- Ecuador and the Dominican Republic supplied 62% of imported fruits, while China provided 68% of oilseeds and protein crops.

Imports from other Member States

- Fresh and processed fruits & vegetables seem to be the largest category of organic imports to the Netherlands from other EU member states.

- The main EU exporters of organic products to the Netherlands are:

  - Spain: fruits & vegetables, olive oil and wine,
  - France: wine, cereals and other processed products,
  - Italy: fruits & vegetables, pasta and other cereal products and wine,
  - Denmark: dairy products, fruits & vegetables,
  - Poland: cereals and cereal-based products.

Germany

- Germany imports many organic product categories, including arable crops, fruits & vegetables, dairy, meat, eggs and sugar.

- Germany depends largely on imports of organic soybeans and some organic vegetables.

Import share by volume by type of organic product

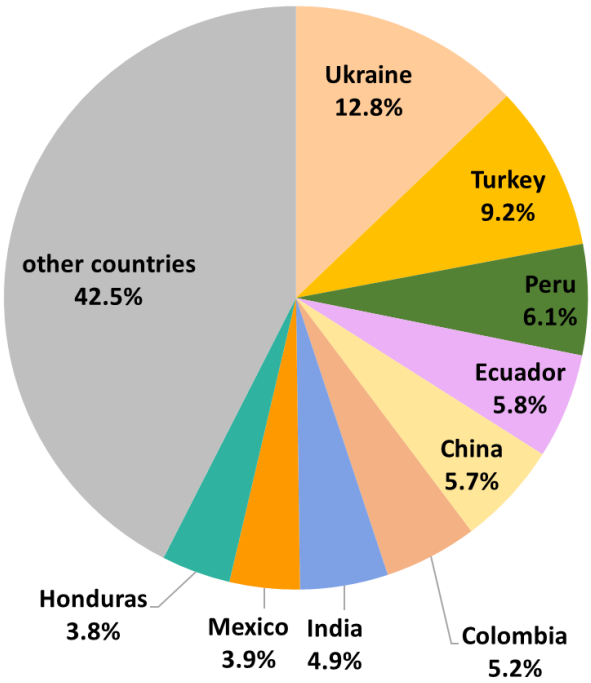
Organic products	2018/2019	2023/2024	Trends 2025/2026
Soybean	85%	Almost 80%	nd
Protein peas	65%	32%	Stable compared to 2023/2024
Cereals	17%	11%	Up
Peppers	96%	94%	nd
Tomatoes	90%	88%	nd
Cucumbers	89%	87%	nd
Zucchini	78%	76%	nd
Carrots	42%	40%	Stable
Apples	20%	32%	Down
Potatoes	27%	19%	Down
Dairy products (milk equivalent)	32%	24%	Up
Pork	24%	34%	Stable
Beef	9%	7%	Up
Eggs	12%	13%	Stable

Imports from third countries

- In 2024, organic imports from third countries rose 2.2% from 2023 to over 426,000 tonnes but remained 0.4% below 2018 levels.

- Ukraine[1] accounted for 12.8% and Turkey for 9.2% of organic imports by volume from third countries in 2024.

Distribution of organic imports by volume from third countries into Germany in 2024



Source: Agence BIO based on TRACES

1- Primarily arable crops: oilseeds & protein crops 43.3% and cereals 39.8% of organic exports to Germany.

- In 2024, Ukraine's organic exports to Germany consisted mainly of arable crops: oilseeds & protein crops 43.3% and cereals 39.8%. Turkey exported mainly fruits (39.7%) and oilseeds & protein crops (34.6%), while Peru's exports were mostly coffee (71.6%) and fruits (14.2%).

- Fruits made up 25% and sugar 12% of German organic imports from third countries in 2024.

- Ecuador and the Dominican Republic supplied 31.5% of organic fruits, while Colombia and Mexico provided 43.5% of organic sugar.

Imports from other Member States

- Germany also imports many organic products from other EU member states.

Main origins of organic products imported into Germany, by category

Product category	Main supplier countries
Cereals	Poland, Romania, Slovakia, The Netherlands and Austria
Oilseeds	Romania, Italy, The Netherlands and Poland
Protein crops	Lithuania, Poland and Romania
Fruits & vegetables	Spain and Italy
Wines	Spain, Italy and France
Milk and dairy products	Denmark and Austria
Eggs	Denmark
Beef	Austria, Denmark and Baltic States
Poultry	Austria, France and The Netherlands
Pork	The Netherlands and Denmark

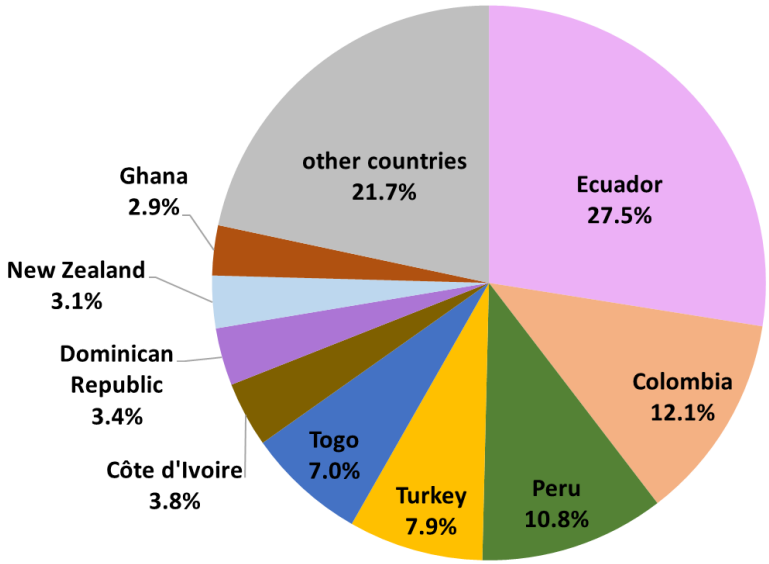
Belgium

- Belgium imports substantial volumes of organic products, while also re-exporting a significant share. The majority of organic products imported into Belgium from third countries enter the country via Flanders.

Imports from third countries

- In 2024, Belgian organic imports from third countries increased by 12.9% in volume compared to 2023, reaching 308,606 tonnes. They also rose by 74% compared to 2018.
In 2024, 27.5% of organic product imports in volume from third countries originated from Ecuador and 12.1% from Colombia.

Distribution of organic imports by volume from third countries into Belgium in 2024



Source: Agence BIO based on TRACES

- In 2024, Ecuador mainly exported bananas to Belgium (97.3% of volumes). Colombia also primarily exported bananas (82.2%) to Belgium. As for Peru, bananas likewise accounted for the largest share of organic exports to Belgium (62.0%), followed by coffee (28%).

- In 2024, fruit accounted for 57% of Belgian organic imports from third countries (with bananas alone representing more than 50%), while soybeans accounted for 9% and coffee for 8%.

- 47% of imported fruit originated from Ecuador. 74% of soybeans came from Togo. 36% of coffee came from Peru.

Imports from other Member States

- Belgium mainly imports fruits & vegetables from other EU countries.

- The main EU member states exporting organic products to Belgium are:

  - The Netherlands: fruits & vegetables, eggs and various food products,
  - Germany: fruits & vegetables, pork and processed products,
  - France: fruits & vegetables, processed products and wines,
  - Italy: fruits & vegetables and olive oil,
  - Spain: fruits & vegetables.

Italy

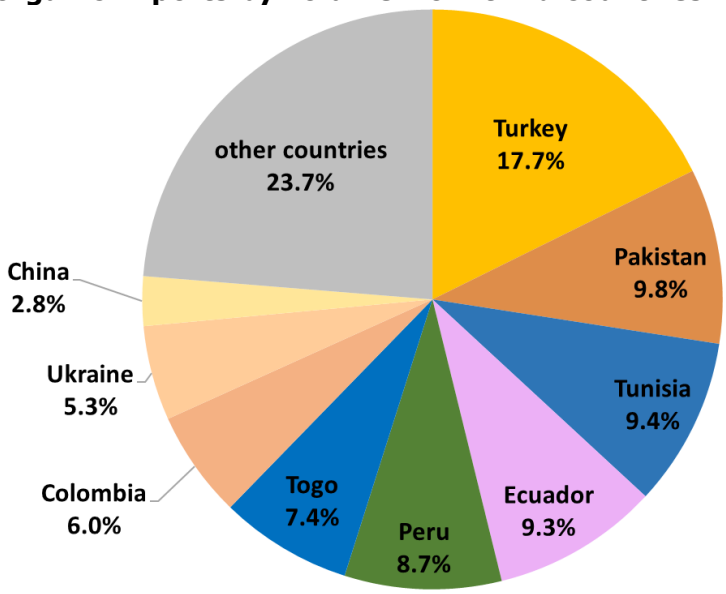
- The most imported organic products by Italy are cereals (28.1% by volume in 2023), fresh and dried fruits (21.3%), oilseeds (12%), vegetables (9.9%) and olive oil (9.7%).

Imports from third countries

- In 2024, organic imports from third countries by volume rose 6.1% from 2023, reaching 263,490 tonnes, representing a 42% increase since 2018.
Fruit and processed product imports recorded the highest growth between 2023 and 2024.

- In 2024, Turkey accounted for 17.7% and Pakistan for 9.8% of organic imports by volume from third countries.

Distribution of organic imports by volume from third countries into Italy in 2024



Source: Agence BIO based on TRACES

- In 2024, Turkey mainly exported durum wheat (54.8% of volumes) and lentils (15.7%) to Italy. Rice accounted for the bulk of Pakistani organic exports to Italy (96.9%). Tunisia's main organic export to Italy was olive oil (97.6%).

- In 2024, cereals accounted for 27.8% of the organic volumes imported by Italy from third countries, fruits 24.5% (19.3% for bananas) and oilseeds and protein crops 17.8%.

- 69% of the imported cereals came from Turkey and Pakistan. 36% of the fruits came from Ecuador, while 41% of the oilseeds and protein crops came from Togo.

Imports from other Member States

- Italy imports organic milk from other EU member states (between 30,000 and 40,000 tonnes per year[1]). It mainly comes from Austria and Slovenia. Some of the imported organic milk is intended for processing, while another part is imported already packaged.

- It also imports cereals, cereal-based products and fresh and processed fruits & vegetables.

1- This represents about 2% of its milk imports.

France

- In 2024, France imported €2.348 billion worth of organic products, an increase of 0.1% compared to 2023. However, organic imports have grown 2.4 times over the past ten years, reflecting the strong growth of the French organic market.

- In 2024, 29% by value of the products consumed on the French market came from abroad (compared to 34% in 2020). Excluding non-substitutable products, i.e., those that cannot be produced in France, import share falls to 16%.

- In 2024, 54% of organic imports by value came from third countries and 46% from other EU countries. Third-country origins accounted for at least two-thirds of organic exports of fruits, sweet grocery products and non-alcoholic beverages and nearly two-thirds for aquaculture products.

- The main organic products imported by France are:

  - Sweet grocery products: 32% of organic imports by value, including tropical products such as coffee, cocoa, tea and cane sugar,
  - Savory grocery products: 27%, including cereals, pulses and oilseeds, processed or not[1] and olive oil[2],
  - Fruits: 16%, including tropical fruits such as bananas and Mediterranean fruits,
  - Non-alcoholic beverages, including fruit and vegetable juices: 7%,
  - Vegetables: 4%,
  - Aquaculture products: 4%, mainly salmon[3] and shrimp[4].

- France is also increasingly importing Mediterranean cheeses (feta and mozzarella) from neighbouring countries.

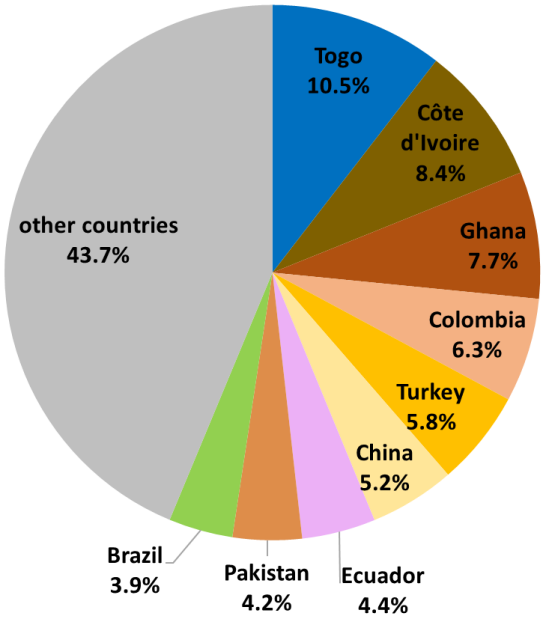
Imports from third countries

- In 2024, its direct organic imports from third countries fell by 14.3% compared to 2023, reaching 195,843 tonnes. The decrease compared to 2018 is 8%.

- In 2024, 10.5% of organic imports by volume from third countries came from Togo and 8.4% from Côte d'Ivoire.

1- Specifically, durum wheat, rice and soybeans
2- Mainly imported from Tunisia
3- Origins: Ireland, Scotland and Norway. Some of the imports from Norway pass through Sweden.
4- Mainly from Madagascar and Ecuador

Distribution of organic product imports by volume from third countries into France in 2024



Source: Agence BIO based on TRACES

- In 2024, Togo mainly exported soybeans (68.8%) and oilseed cakes and other solid residues (26.9%) to France. Côte d'Ivoire primarily sold bananas (91.8%) to France. Ghana also mainly exported bananas (80.5%) to France.

- In 2024, fruits accounted for 30.8% of the organic volumes imported by France from third countries (18.3% for bananas alone) and oilseeds and protein crops accounted for 21.2%.

- In 2024, 26% of fruits imported by France came from Côte d'Ivoire and 25% from Ghana, while 47% of imported oilseeds and protein crops came from Togo.

Imports from other Member States

- In 2024, the main organic products imported from other EU countries were savoury grocery items (including olive oil), sweet grocery products and fruits.

- Spain and Italy are major exporters of organic products to France.

Sweden

- Sweden primarily imports organic fruits & vegetables, with half of all consumed organic produce (excluding potatoes) coming from abroad.

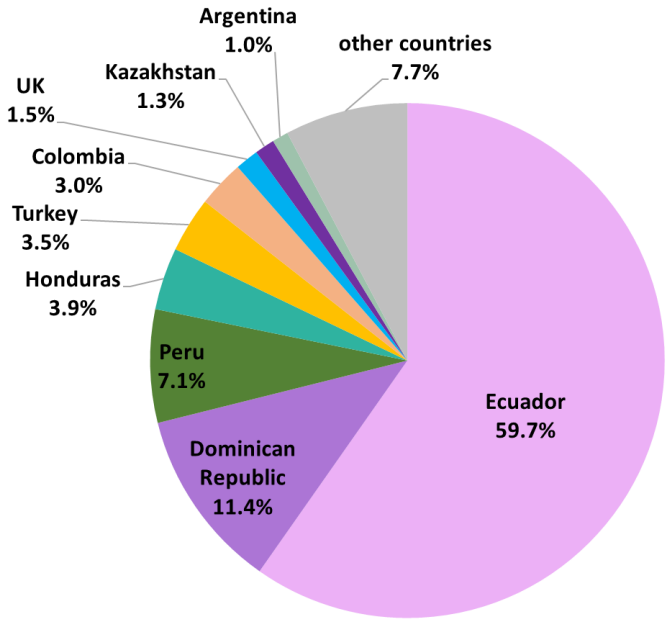
- It imports and re-exports Norwegian organic salmon.

Imports from third countries

- In 2024, organic imports by volume from third countries fell by 13.3% compared to 2023, reaching 120,544 tonnes. The decrease compared to 2018 amounts to 28%.

- In 2024, 59.7% of organic imports by volume from third countries came from Ecuador and 11.4% from the Dominican Republic.

Distribution of organic imports by volume from third countries into Sweden in 2024



Source: Agence BIO based on TRACES

- In 2024, Ecuador exported almost exclusively bananas (99.9%) to Sweden. The Dominican Republic sold only bananas to Sweden.

- In 2024, fruits accounted for 79.2% of the organic volumes imported by Sweden from third countries (76.9% for bananas alone).

- In 2024, 75% of organic fruits imported by Sweden came from Ecuador.

Imports from other Member States

- Sweden mainly imports organic fruits & vegetables from other EU member states, as well as cereals and processed products.

- Denmark is its main organic supplier within the European Union.

Denmark

- In 2024, Denmark imported €585 million worth of organic products, a decrease of 12.5% compared to 2023. Nevertheless, Danish organic imports have more than doubled over the last decade and increased nearly fourteenfold over the past twenty years.

- In 2024, 22% of the organic products consumed in Denmark (by value) were imported.

- Fresh and processed fruits & vegetables remained the main category of organic products imported in 2024, accounting for 42.8% of the value of Danish organic imports.

- In 2024, 87.9% of Danish organic imports by value came from Europe (EU and non-EU), mostly from the European Union. Although the total EU figure is not available, the group of the twelve[1] main EU exporters to Denmark accounted for 92% of European exports to the country. The United Kingdom, Norway and Turkey represented only 2% of organic imports from Europe.

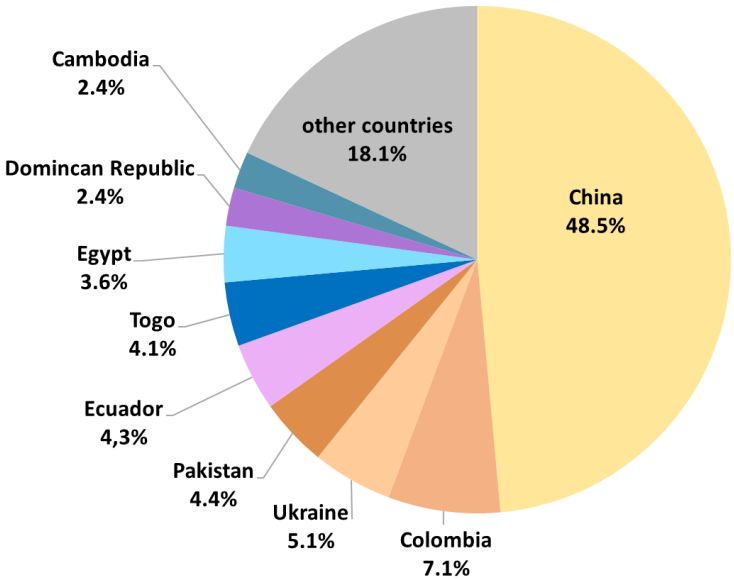
Imports from third countries

- In 2024, under 19% by value of Danish organic imports came from third countries.

- In 2024, Denmark imported 84,124 tonnes of organic products from third countries, an increase of 20.2% compared to 2023, but a decrease of 34% compared to 2018.

- In 2024, 48.5% of organic imports by volume from third countries came from China and 7.1% from Colombia.

Distribution of organic imports by volume from third countries into Denmark in 2024



Source: Agence BIO based on TRACES

1- Germany, Austria, Belgium, Spain, Finland, France, Greece, Ireland, Italy, the Netherlands, Poland and Sweden

- In 2024, China mainly exported oilseed cakes and other solid residues (93.6%) to Denmark. Bananas accounted for 83.8% by volume of Colombian organic exports to Denmark in 2024. Ukraine primarily sold maize (96.8%) to Denmark.

- In 2024, oilseeds and protein crops accounted for 51.8% of the organic volumes imported by Denmark from third countries (47.2% for oilseed cakes alone), while fruits accounted for 16.6% (12.7% for bananas alone).

- In 2024, 89% of the oilseeds and protein crops imported by Denmark came from China. 36% of the fruits imported by Denmark came from Colombia and 26% from Ecuador.

Imports from other Member States

- In 2024, over 81% by value of Danish organic imports came from other EU countries.

- In 2024, the main EU member states exporting organic products to Denmark were Italy (17.3% of Danish organic imports by value), Spain (15.5%), Germany (13.7%), the Netherlands (13.7%), Sweden (7.5%) and France (4.5%).

- In 2024, Italy mainly exported fruits & vegetables (47.5% by value) and cereals and cereal-based products (9.9%) to Denmark.

- In 2024, Spain mainly exported fruits & vegetables (85.5% by value) and beverages (7.7%) to Denmark.

- In 2024, Germany mainly exported fruits & vegetables (34.6% by value) and cereals and cereal-based products (20.6%) to Denmark.

- In 2024, the Netherlands mainly exported fruits & vegetables (52.4% by value) and animal feed products (18.1%) to Denmark.

- In 2024, Sweden mainly exported cereals and cereal-based products (33% by value) and fruits & vegetables (26.5%) to Denmark.

- In 2024, France mainly exported beverages (39.4% by value), fruits & vegetables (16.6%) and oilseeds and nuts (16.5%) to Denmark.

Spain

- In 2024, Spain imported €782 million worth of organic products[1], a decrease of 47.2% compared to 2023, but almost double the amount compared to 2015.

- In 2024, Spanish organic import rate was therefore 25%.

- The main organic products imported by Spain in 2024 were processed vegetables, tropical fruits and juices.

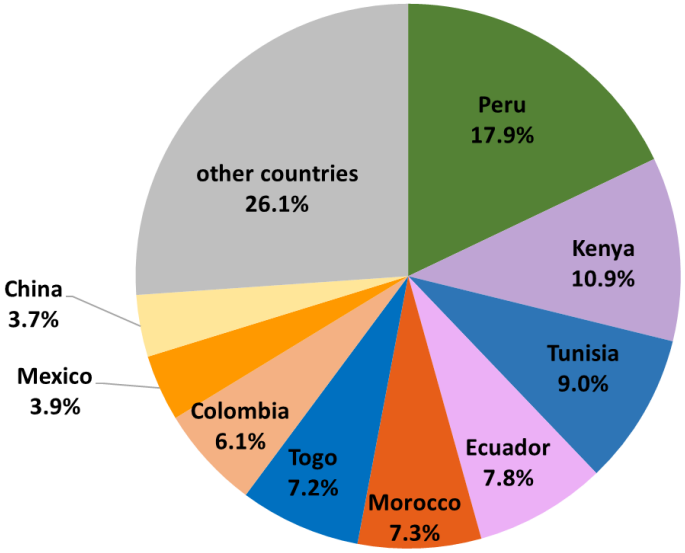
1- This represents 4.1% of Spanish agri-food imports in 2024.

Imports from third countries

- In 2024, Spain imported 78,474 tonnes of organic products from third countries, a decrease of 11.8% compared to 2023 and a level very similar to that of 2018 (- 0.4%).

- In 2024, 17.9% of organic imports by volume from third countries came from Peru and 10.9% from Kenya.

Distribution of organic imports by volume from third countries into Spain in 2024



Source: Agence BIO based on TRACES

- In 2024, Peru mainly exported avocados (54.9% of volumes), lemons (10.5%) and coffee (10.1%) to Spain. Avocados accounted for 97.3% of the organic products exported by Kenya to Spain. Tunisia primarily sold olive oil (92.6%) to Spain.

- In 2024, fruits accounted for 33.9% of the organic volumes imported by Spain from third countries (23.7% for avocados alone), oilseeds and protein crops 13.2% and sugar 12.5%.

- In 2024, 37% of the organic fruit volumes imported by Spain came from Peru and 31% from Kenya. 54% of the oilseeds and protein crops imported by Spain came from Togo. 41% of the organic sugar volumes imported came from Colombia.

Imports from other Member States

- Spain imports from the EU organic processed cereal-based products, fruits & vegetables, baby food, dietetic products, dairy products and animal feed products.

- The main Eun suppliers of organic products to Spain are Germany, France, the Netherlands and Italy.

Ireland

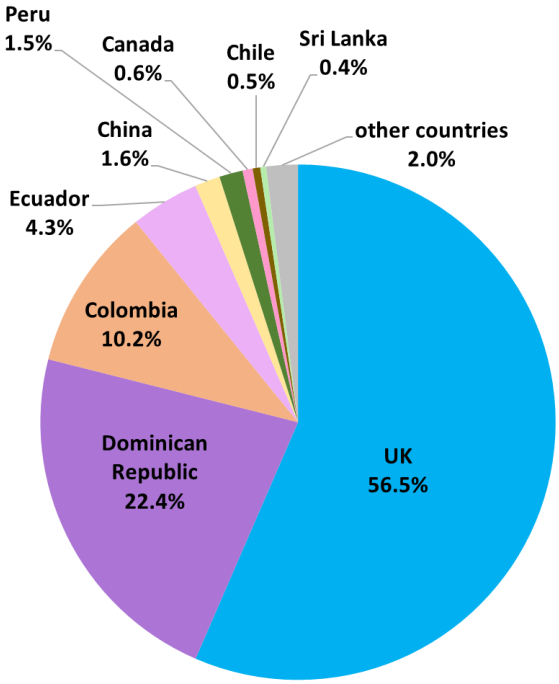
- In Ireland, the organic sector remains heavily dependent on imports to meet market demand. About 70% of the organic vegetables consumed there come from abroad. A significant share of organic arable crops for animal feed is also imported.

Imports from third countries

- In 2024, Ireland imported 55,125 tonnes of organic products from third countries, an increase of 0.8% compared to 2023, but nearly triple the amount compared to 2018.

- In 2024, 56.5% of organic imports by volume from third countries came from the United Kingdom and 22.4% from the Dominican Republic.

Distribution of organic imports by volume from third countries into Ireland in 2024



Source: Agence BIO based on TRACES

- In 2024, the United Kingdom mainly exported forage crops and other animal feed products (75.5%) to Ireland, while the Dominican Republic exported only bananas.

- In 2024, animal feed and forage crops accounted for 42.7% of the organic volumes imported by Ireland from third countries and fruits 37.4% (36.3% for bananas alone).

- In 2024, all organic animal feed and forage crops imported by Ireland came from the United Kingdom. 60% of the organic fruit volumes imported by Ireland came from the Dominican Republic and 27% from Colombia.

Imports from other Member States

- Ireland buys organic vegetables and arable crops for animal feed from France.

Austria

- Fruits & vegetables are the main category of organic products imported by Austria.

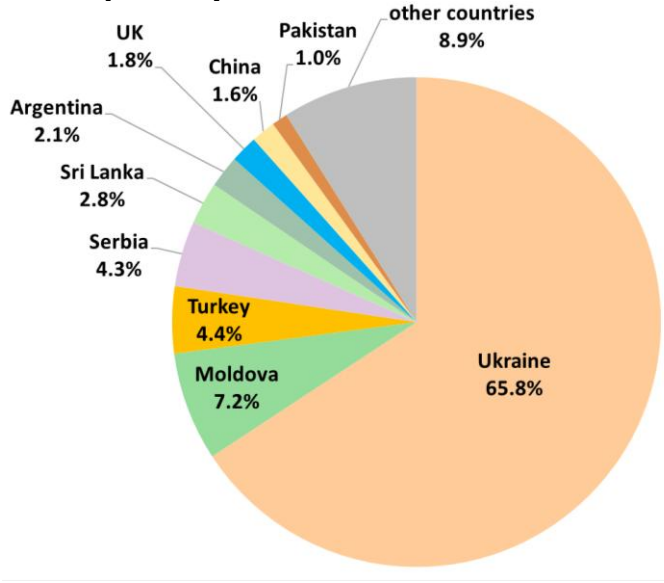
- Austria buys more organic products from other EU member states than from third countries.

Imports from third countries

- In 2024, Austria imported 41,061 tonnes of organic products from third countries, a decrease of 26.5% compared to 2023, but an increase of 14% compared to 2018.

- In 2024, 65.8% of organic imports by volume from third countries came from Ukraine and 7.2% from Moldova.

Distribution of organic imports by volume from third countries into Austria in 2024



Source: Agence BIO based on TRACES

- In 2024, Ukraine mainly exported soybeans (56.5%) and sunflower oil (11.6%) to Austria. Moldova primarily exported oilseed cakes and other solid residues (96.7%) to Austria.

- In 2024, oilseeds and protein crops accounted for 56% of the organic volumes imported from third countries and fruits 11.2%.

- In 2024, 86% of the organic oilseeds and protein crops imported by Austria came from Ukraine and 12% from Moldova. 30% of fruit imports came from Ukraine and 26% from Serbia.

Imports from other Member States

- Its main EU suppliers of organic fruits & vegetables are Italy, Spain, France, Germany and Greece.

- Austria imports unprocessed organic products from Romania, particularly arable crops.

- It mainly imports processed organic products from Western Europe, especially Germany, the Netherlands and Italy.

Poland

- Poland relies heavily on organic imports, with around 70% of the country's organic consumption coming from abroad.

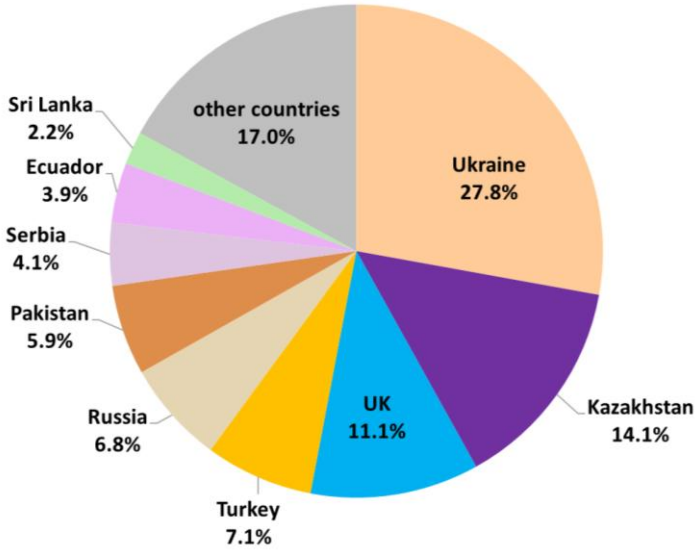
- Poland imports more organic products from the European Union than from third countries.

Imports from third countries

- In 2024, direct organic imports from third countries amounted to 30,488 tonnes, an increase of 11% compared to 2023 and 58% compared to 2018.

- In 2024, 27.8% of organic imports by volume from third countries came from Ukraine and 14.1% from Kazakhstan.

Distribution of organic imports by volume from third countries into Poland in 2024



Source: Agence BIO based on TRACES

- In 2024, Ukraine mainly exported fruits (55.7%) and cereal-based products (18.9%) to Poland. Kazakhstan primarily exported flax seeds (99%) to Poland. Salmon was the main organic product sold by the United Kingdom to Poland (95.5%).

- In 2024, fruits accounted for 28.9% of the organic volumes imported from third countries and flax seeds 23.6%.

- In 2024, 54% of the organic fruit volumes imported by Poland came from Ukraine and 12% from Serbia. 59% of the organic flax seed volumes imported by Poland came from Kazakhstan and 28% from Russia.

Imports from other Member States

- Within the European Union, the main suppliers of organic products to Poland are Italy, Spain and Germany. Poland also buys organic products from the Netherlands, France, the Czech Republic, Belgium, Slovakia and Austria.

- It mainly buys fruits & vegetables and processed products, from its neighbouring countries.

Czech Republic

- The Czech Republic relies heavily on imports, with 69% of the organic products consumed in the country coming from abroad in 2023.

- In 2023, Czech organic imports amounted to over €200 million. A significant portion of these imports is subsequently re-exported.

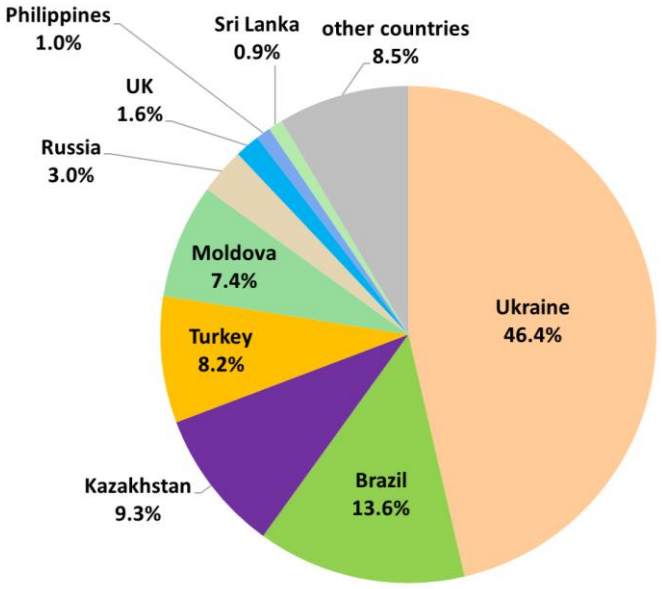
- The majority of Czech organic imports come from the EU.

Imports from third countries

- In 2024, direct organic imports from third countries increased by 40.5% compared to 2023, reaching 23,315 tonnes (0.9% of the EU organic imports). However, they remain 20.9% below the 2018 level.

- In 2024, 46.4% of organic imports by volume from third countries came from Ukraine and 13.6% from Brazil.

Distribution of organic imports by volume from third countries into the Czech Republic in 2024



Source: Agence BIO based on TRACES

- In 2024, Ukraine mainly exported fruits (43.8%) and soybeans (25.6%) to the Czech Republic. Brazil primarily exported cane sugar (99.8%) to the Czech Republic.

- In 2024, oilseeds and protein crops accounted for 32.2% of the organic volumes imported from third countries (11.9% for soybeans alone) and fruits 22.7%.

- In 2024, 52% of the organic oilseeds and protein crops imported by the Czech Republic came from Ukraine, 24% from Turkey and 23% from Moldova. 89% of the imported organic fruits came from Ukraine.

Imports from other Member States

- The Czech Republic's main EU suppliers of organic products are Germany, Italy, France and Spain.

Romania

- Romania imports more organic products from other EU member states than from third countries.

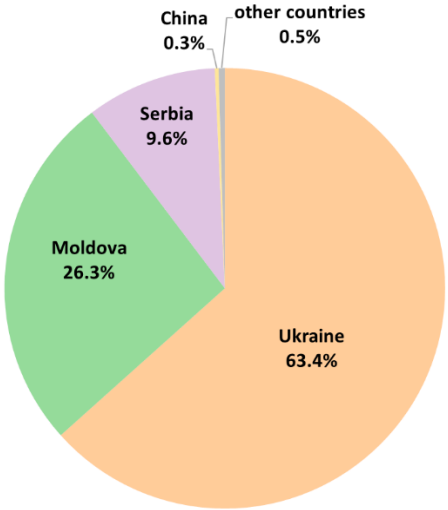
Imports from third countries

- Romania imports between 80% and 90% of its organic products consumption.

- In 2024, its direct organic imports from third countries increased by 244% compared to 2023, reaching 20,288 tonnes (0.8% of the EU organic imports). The growth since 2018 is 130%.

- In 2024, 63.4% of organic imports by volume from third countries came from Ukraine and 26.3% from Moldova.

Distribution of organic imports by volume from third countries into Romania in 2024



Source: Agence BIO based on TRACES

- In 2024, Ukraine mainly exported soybeans (75%) and maize (18.2%) to Romania. Moldova primarily exported maize (57.8% of volumes) and oilseeds and protein crops (27.8%) to Romania.

- In 2024, oilseeds and protein crops accounted for 59.9% of the organic volumes imported from third countries (51.8% for soybeans alone) and cereals 32% (26.8% for maize alone).

- In 2024, 81% of the organic oilseeds and protein crops imported by Romania came from Ukraine. 47% of the imported organic cereals came from Moldova, 36% from Ukraine and 16% from Serbia.

Imports from other Member States

- The main EU suppliers of organic products to Romania are Italy, Germany, France, Spain, Poland, the Netherlands and Greece.

- Romania imports processed products, dairy products, pasta and flour from Germany.

- France sells cheese, butter, processed fruits and bakery/pastry products to Romania.

- Romania imports fresh and processed fruits & vegetables from Spain, as well as olive oil and fruit juices.

Greece

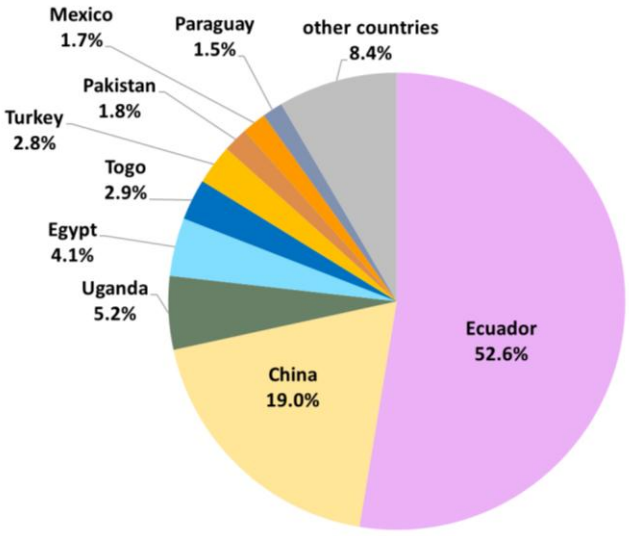
- imports fresh and processed organic fruits & vegetables, olives and olive oil (even though it also produces them), wines, dairy products, meats and cereal-based products.

Imports from third countries

- In 2024, direct organic imports from third countries increased by 11% compared to 2023, reaching 13,400 tonnes (0.5% of the EU organic imports). The increase compared to 2018 is even 110%.

- In 2024, 52.6% of organic imports by volume from third countries came from Ecuador and 19% from China.

Distribution of organic imports by volume from third countries into Greece in 2024



Source: Agence BIO based on TRACES

- In 2024, Ecuador exported only bananas to Greece. China mainly exported oilseed cakes and other solid residues (79.6%) and peanuts (18.4%).

- In 2024, fruits accounted for 59.4% of the organic volumes imported by Greece from third countries (52.6% for bananas alone) and oilseeds and protein crops 19.2%.

- In 2024, 89% of the organic fruit volumes imported by Greece came from Ecuador. 79% of the imported oilseeds and protein crops came from China.

Imports from other Member States

- The main EU suppliers of organic products to Greece are Italy, Germany, Spain, the Netherlands and France.

- Organic wines are imported from Spain, Italy and France.

- Organic meats and dairy products are mainly imported from France, Germany and Italy.

- Organic cereal-based products mainly come from Italy and France.

Finland

- The Finnish organic market's dependence on imports is estimated at around 45%, i.e., approximately €150 million in 2024.

- It imports more organic products from the European Union than from third countries.

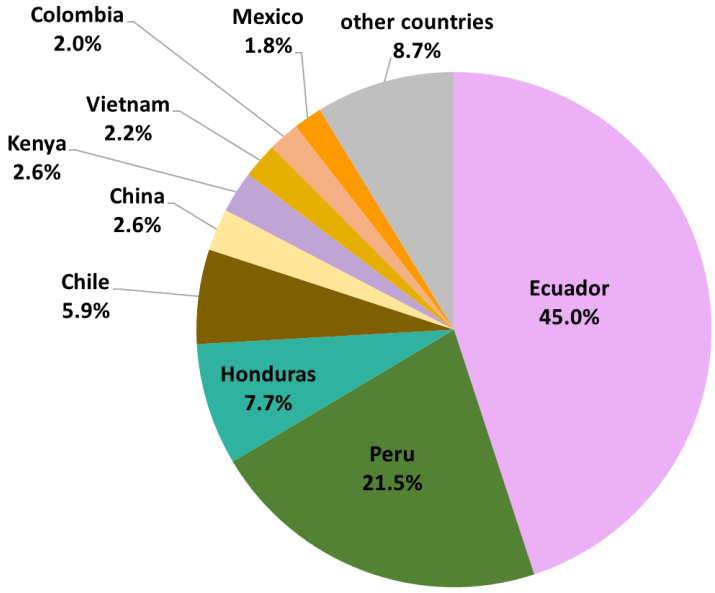
- It imports large quantities of organic fruits & vegetables in particular.

Imports from third countries

- In 2024, direct organic imports from third countries decreased by 2.0% compared to 2023, reaching 11,460 tonnes (0.4% of the EU organic imports). They were down 23.5% compared to 2018.

- In 2024, 45% of organic imports by volume from third countries came from Ecuador and 21.5% from Peru.

Distribution of organic imports by volume from third countries into Finland in 2024



Source: Agence BIO based on TRACES

- In 2024, Ecuador mainly exported bananas (98.7%) to Finland. The same applies to Peru, with 99% of its exports being bananas.

- In 2024, fruits accounted for 67.2% of the organic volumes imported by Finland from third countries (65.7% for bananas alone) and coffee 14.2%.

- In 2024, 67% of the organic fruit volumes imported by Finland came from Ecuador and 32% from Peru. 54% of the organic coffee volumes imported came from Honduras.

Imports from other Member States

- The Netherlands, Germany, Sweden, Denmark, Spain and Italy are the main suppliers of organic products to Finland.

- Finland imports organic fruits & vegetables from several EU countries, including Spain and Italy.

- It also imports cereals, cereal-based products, dairy products, eggs, meat and processed products from other member states.

Slovenia

- Over 85% of the organic products sold in Slovenian supermarkets are imported.

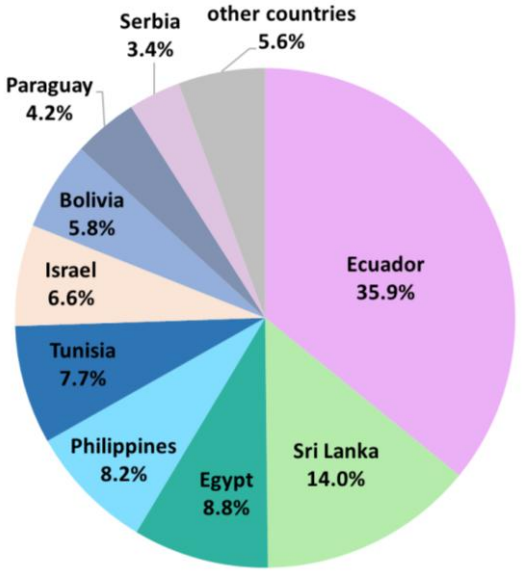
- The majority of organic products imported into Slovenia come from other EU member states.

Imports from third countries

- In 2024, direct organic imports from third countries increased by 24% compared to 2023, reaching 8,194 tonnes (0.3% of the EU organic imports). However, they remain 53.1% below the 2018 level.

- In 2024, 35.9% of organic imports by volume from third countries came from Ecuador and 14% from Sri Lanka.

Distribution of organic imports by volume from third countries into Slovenia in 2024



Source: Agence BIO based on TRACES

- In 2024, Ecuador exported almost exclusively bananas to Slovenia. Sri Lanka mainly exported coconut oil (99.9%) to Slovenia. Egypt sold only organic vegetables to Slovenia, of which 68.7% were onions.

- In 2024, fruits accounted for 39.9% of the organic volumes imported by Slovenia from third countries (35.9% for bananas alone), coconut oil 23.5% and vegetables 14.6%.

- In 2024, 90% of the organic fruit volumes imported by Slovenia came from Ecuador. All of the coconut oil originated from the Philippines. 60% of the organic vegetable volumes imported came from Egypt and 40% from Israel.

Imports from other Member States

- Slovenia mainly imports organic products from nearby countries: Germany, Austria and Italy.

- Slovenia imports organic fruits & vegetables, especially Mediterranean products, as well as processed products, cereal-based products, dairy products, wines, olive oil and honey.

Lithuania

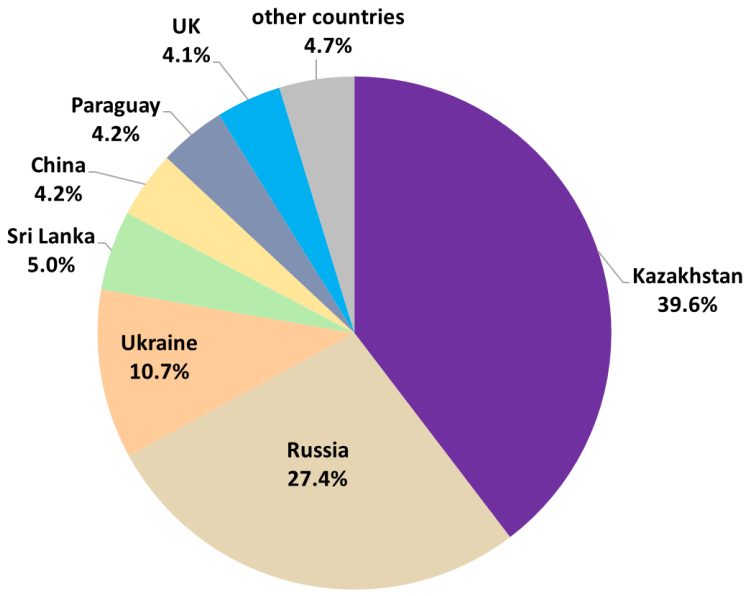
- Lithuania imports several categories of organic products because its climate does not allow it to grow all the organic products demanded by consumers. The main organic products imported are fruits & vegetables.

Imports from third countries

- In 2024, direct organic imports from third countries fell by 46% compared to 2023, reaching 7,976 tonnes (0.3% of the EU organic imports). However, they have nearly tripled compared to 2018.

- In 2024, 39.6% of organic imports by volume from third countries came from Kazakhstan and 27.4% from Russia.

Distribution of organic imports by volume from third countries into Lithuania in 2024



Source: Agence BIO based on TRACES

- In 2024, Kazakhstan mainly exported flax seeds (79.3%) and other oilseeds and protein crops (20.7%) to Lithuania. Russia primarily exported oilseeds and protein crops (94.3%) to Lithuania. Ukraine sold fruits (80.6%) and oilseeds and protein crops to Lithuania.

- In 2024, flaxseed accounted for 33.3% of organic volumes imported by Lithuania from third countries and peas, 21.0%.

- In 2024, 94% of imported flaxseed volumes came from Kazakhstan. 88% of imported organic pea volumes came from Russia.

Imports from other Member States

- Lithuania's main suppliers of organic products are Germany, Poland, the Netherlands, Latvia, Italy, Sweden and Belgium.

- The main categories of organic products that Lithuania imports from the European Union are fruits & vegetables, baby food, cereal products, as well as various processed goods such as fruit juices, processed vegetables and sauces.

Bulgaria

- Bulgaria continues to rely on imports for more than 60% of the supply of organic products to its market.

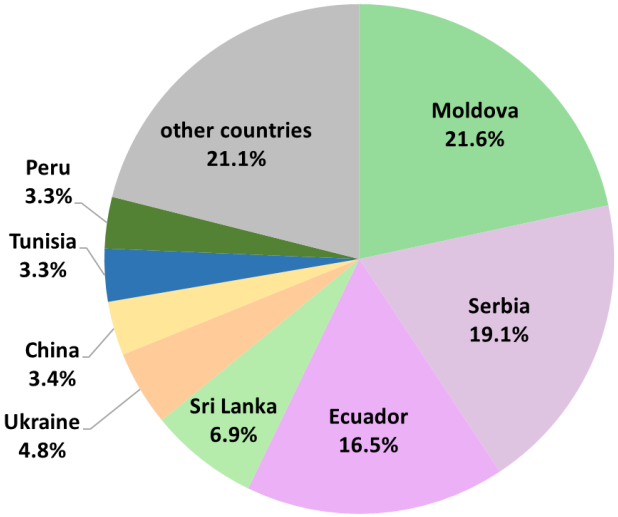
- It imports large quantities of organic baby food as well as organic products from animals, which are still underdeveloped in Bulgaria

Imports from third countries

- In 2024, the volume of organic products imported directly from third countries fell by 1.4% compared to 2023, reaching 6,202 tonnes (equivalent to 0.2% of the EU organic imports). Organic imports have decreased by 49.5% compared to 2018.

- In 2024, 21.6% of the volume of organic products imported from third countries came from Moldova and 19.1% from Serbia.

Distribution of organic imports by volume from third countries into Bulgaria in 2024



Source: Agence BIO based on TRACES

- In 2024, Moldova mainly exported oilseeds to Bulgaria, with 69.5% sunflower seeds and 28.8% oilseeds cakes and other solid residues. Serbia primarily exported sunflower seeds (98.2%) to Bulgaria. Ecuador sold almost exclusively bananas (99.5%) to Bulgaria.

- In 2024, oilseeds accounted for 40.7% of the volume of organic products that Bulgaria imported from third countries (33% for sunflower seeds alone), while fruits accounted for 32.4% (16.4% for bananas alone).

- In 2024, 52% of the organic oilseeds imported by Bulgaria came from Moldova and 46% from Serbia. Meanwhile, 51% of the organic fruit imports originated from Ecuador and 13% from Ukraine.

Imports from other Member States

- Bulgaria imports organic baby food, dairy products, meat, poultry and eggs from other EU countries.

- It imports organic baby food mainly from Germany and France and dairy products from Germany, France, Netherlands and Denmark.

- Germany is its main supplier of organic meat, poultry and eggs.

Portugal

- Portugal needs to import about half of its consumption of organic products.

- Portugal imports notably tropical and temperate fruits & vegetables, oils, coffee, cocoa, cereals, oilseeds, wine, dairy products and various other categories of processed goods.

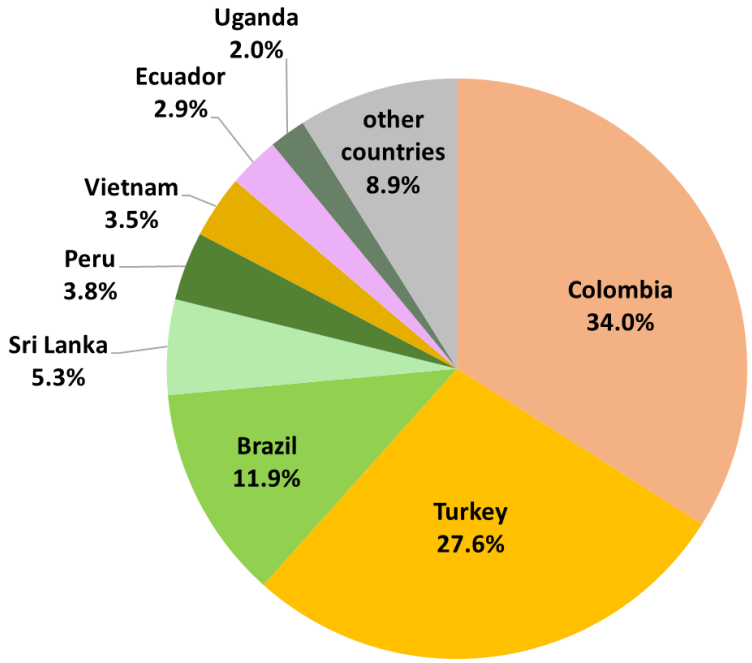
- This country imports more organic products from other member states than from third countries.

Imports from third countries

- In 2024, the volume of organic products imported directly from third countries increased by 34.1% compared to 2023, reaching 5,649 tonnes (equivalent to 0.2% of the EU organic imports). However, this represents a decline of 22% compared to 2018.

- In 2024, 34% of the volume of organic products imported from third countries came from Colombia and 27.6% from Turkey.

Distribution of organic imports by volume from third countries into Portugal in 2024



Source: Agence BIO based on TRACES

- In 2024, Colombia mainly exported bananas (98.9%) to Portugal. Turkey primarily exported fruit & vegetable preparations (97.4%) to Portugal. Brazil sold fruit and vegetable preparations (77.9%) and fruits (20.2%) to Portugal.

- In 2024, fruit & vegetable preparations accounted for 40.2% of the organic products that Portugal imported from third countries (26.5% for apple juice alone), while fruits accounted for 37.5% (34% for bananas alone).

- In 2024, two-thirds of the organic fruit & vegetable preparations imported by Portugal came from Turkey and 23% from Brazil. Meanwhile, 90% of the organic fruit imports originated from Colombia.

Imports from other Member States

- Portugal imports many categories of organic products from its neighbours. Its main suppliers of organic products are Spain, France, Germany and Italy.

Main origins of organic products imported into Portugal, by category

Imported products	Main countries of origin
Fruits & vegetables	Spain and Italy
Cereals and cereal-based products	France, Spain, Germany and Italy
Olive oil	Spain and Italy
Wines	Spain, Italy and France

- The origin of processed organic products imported by Portugal varies greatly depending on the product category.

Slovakia

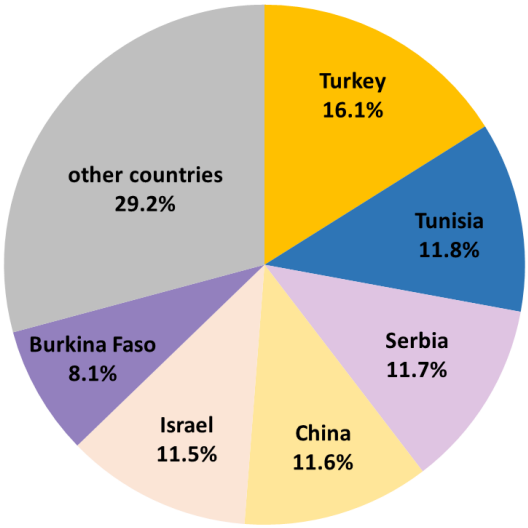
- Slovakia imports many categories of organic products, including tropical fruits, vegetables, coffee, tea, cereals and cereal-based products, oilseeds and their derivatives, oils, spices and other processed goods.

Imports from third countries

- In 2024, the volume of organic products imported directly from third countries increased by 121.6% compared to 2023, reaching 1,157 tonnes (equivalent to 0.04% of the EU organic imports). This represents a 154% increase compared to 2018.

- In 2024, 16.1% of the volume of organic products imported from third countries came from Turkey and 11.8% from Tunisia.

Distribution of organic imports by volume from third countries into Slovakia in 2024



Source: Agence BIO based on TRACES

- In 2024, Turkey primarily exported fruits[1] (80.1%) and oilseeds (19.9%) to Slovakia. Dates accounted for the majority of Tunisia's organic exports to Slovakia (98.8% of the volume). Serbia sold sunflower seeds (74.5% of the volume) and fruit and vegetable preparations (25.5%) to Slovakia.

- In 2024, fruits accounted for 52.7% of the organic products that Slovakia imported from third countries (23.2% for dates alone), fruit & vegetable preparations accounted for 13.1% and oilseeds 11.9%.

- In 2024, 24% of the organic fruit imported by Slovakia came from Turkey, 22% from Tunisia and 22% from Israel. Meanwhile, 23% of organic fruit & vegetable preparations came from Serbia and 21% from Vietnam. For organic oilseeds, 73% imported by Slovakia came from Serbia and 27% from Turkey.

1- Mainly dried figs

Imports from other Member States

- The main suppliers of organic products to Slovakia are Germany and Netherlands.

Croatia

- Croatia imports organic products from other EU countries as well as from third countries. It is fairly dependent on imports, likely around one-third of its consumption.

- In 2022, its imports of organic products were estimated at €34.8 million.

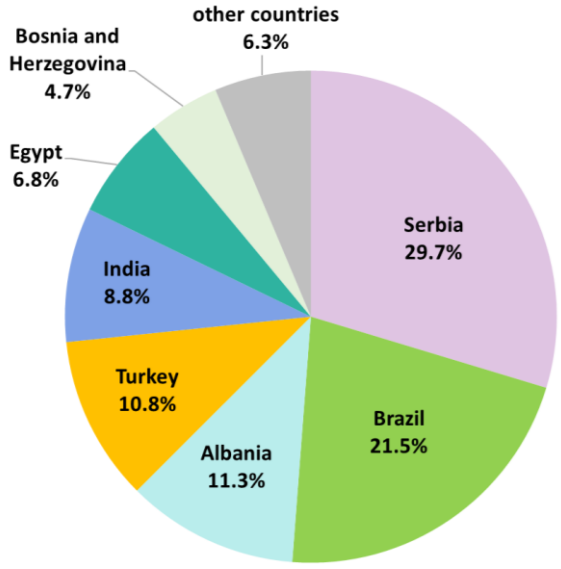
- Croatia imports notably fruits, both fresh and processed, sugar, aromatic and medicinal crops, arable crops, oils, beverages and honey.

Imports from third countries

- In 2024, the volume of organic products imported directly from third countries increased by 2.2% compared to 2023, reaching 812 tonnes (equivalent to 0.03% of the EU organic imports). However, this represents a decline of 77.2% compared to 2018.

- In 2024, 29.7% of the volume of organic products imported from third countries came from Serbia and 21.5% from Brazil.

Distribution of organic imports by volume from third countries into Croatia in 2024



Source: Agence BIO based on TRACES

- In 2024, Serbia primarily exported fruits (87.3%) and peas (9.7%) to Croatia. Brazil exported only white sugar to Croatia.

- In 2024, fruits accounted for 41.5% of the organic products that Croatia imported from third countries, while white sugar accounted for 30.4%.

- In 2024, 62% of the organic fruit imported by Croatia came from Serbia and 18% from Turkey. For organic sugar, 71% of the imports came from Brazil and 29% from India.

Imports from other Member States

- Within the European Union, Croatia mainly imports organic products from Germany, Netherlands, Austria, Hungary, Slovenia and Belgium, with Germany and the Netherlands as its primary suppliers.

Latvia

- Latvia mainly imports organic fruits & vegetables, as it produces very little domestically.

- A large share of its organic imports comes from neighbouring EU countries.

Imports from third countries

- In 2024, the volume of organic products imported directly from third countries increased by 22.2% compared to 2023, reaching 716 tonnes (equivalent to 0.03% of the EU organic imports). Compared to 2018, this represents a fourteenfold increase.

- In 2024, 90.7% of the volume of organic products imported from third countries came from Ukraine. Ukraine mainly exported fruits (99.9%) to Latvia, primarily blueberries.

- In 2024, fruits accounted for 96.3% of the organic products that Latvia imported from third countries, with blueberries alone representing 76.7%.

- In 2024, 94% of the organic fruits imported by Latvia came from Ukraine.

Imports from other Member States

- Latvia mainly imports organic products from its neighbours: Lithuania, Germany, Poland and Estonia.

Hungary

- In 2022, Hungary's organic imports were estimated at €18 million, representing 25% of the Hungarian organic market. Imports and the import share likely increased with the one-third growth of the organic market between 2022 and 2024.

- Hungary imports cereal-based products, oilseeds, honey, fruits & vegetables, olive oil and legumes.

Imports from third countries

- In 2024, the volume of organic products imported directly from third countries increased by 30.4% compared to 2023, reaching 648 tonnes (equivalent to 0.02% of

the EU organic imports). However, this represents a decline of 68.6% compared to 2018.

- In 2024, 42.9% of the volume of organic products imported from third countries came from Ukraine and 31.5% from Serbia.

- In 2024, Ukraine primarily exported honey (52.1% of the volume) and mushrooms (42.6%) to Hungary. Serbia mainly exported oilseeds (45.4%) and fruits (38.5%) to Hungary.

- In 2024, oilseeds accounted for 24.4% of the organic products that Hungary imported from third countries, honey for 22.4% and vegetables for 18.3%.

- In 2024, 59% of the organic oilseeds imported by Hungary came from Serbia and 41% from Turkey. All organic honey imported from third countries came from Ukraine and almost all imported vegetables also originated from Ukraine.

Imports from other Member States

- Hungary imports various categories of organic products from several EU countries, especially Germany, Poland and Austria.

Estonia

- A significant share of the organic products sold in Estonian supermarkets is imported.

- In 2024, Estonia imported €31 million worth of organic products.

- Estonia mainly imports fruits & vegetables, wine, tea and processed products, including baby food.

Imports from third countries

- In 2024, the volume of organic products imported directly from third countries increased by 64.1% compared to 2023, reaching 233 tonnes (equivalent to 0.01% of the European Union's organic imports). However, this represents a decline of 51% compared to 2018.

- In 2024, 42.1% of the volume of organic products imported from third countries came from Ecuador, 19.3% from Paraguay and 17.4% from Sri Lanka.

- In 2024, Ecuador exported only fruit & vegetable preparations to Estonia. Paraguay exported only oilseeds to Estonia. Sri Lanka mainly sold dried coconuts (62.3%) and coconut oil (37.6%) to Estonia.

- In 2024, fruit and vegetable preparations accounted for 42.3% of the organic products that Estonia imported from third countries, while vegetable fats and oils accounted for 25.9%.

- 2024, almost all organic fruit and vegetable preparations imported by Estonia came from Ecuador. Three quarters of the volumes of fats and vegetable oils imported by Estonia came from Paraguay and one quarter from Sri Lanka.

Imports from other Member States

- The main EU suppliers of organic products to Estonia are Germany, the Netherlands, Poland, Finland and its two Baltic neighbours.

Cyprus

- In Cyprus, about 80% of organic products available on the market are imported. These are mainly processed products.

- Imported organic products mainly come from Germany, Spain, France and the United Kingdom.

Imports from third countries

- In 2024, the volume of organic products imported directly from third countries fell by 21.3% compared to 2023, reaching 86 tonnes (or just 0.003% of the EU organic imports). The decrease compared to 2018 is 59.5%.

- In 2024, 50.7% of the volume of organic imports from third countries came from China and 46.9% from the United Kingdom.

- In 2024, China exported only oilseed cakes and other solid residues of oil-protein crops to Cyprus. The United Kingdom mainly exported cereal-based products (56.8%) and fruit and vegetable preparations (22.9%) to Cyprus.

- In 2024, oilseeds and protein crops accounted for 50.7% of the volume of organic imports by Cyprus from third countries, cereal-based products (including flours) 26.7% and fruit and vegetable preparations 10.8%.

- In 2024, almost all organic oilseeds and protein crops imported by Cyprus came from China. All organic cereal-based products came from the United Kingdom, as did almost all organic fruit and vegetable preparations.

Imports from other Member States

- Cyprus imports processed products and organic fruits & vegetables from other EU countries, including Germany.

Malta

- Malta, having a modest organic production, is highly dependent on imports of organic products.

Imports from third countries

- In 2024, volume imports of organic products directly from third countries increased by 60% compared to 2023, reaching 32 tonnes (or 0.001% of organic imports to the European Union), compared to only 1 tonne in 2018.

- In 2024, Sri Lanka and the United Kingdom each accounted for 49.2% of volume imports of organic products from third countries.

- In 2024, Sri Lanka mainly exported culinary preparations (77%) to Malta. The United Kingdom exported cereals (71.3% of the volumes) and cereal-based products (28.7%) to Malta.

- In 2024, mixed food preparations and ingredients accounted for 37.9% of the volume of organic imports by Malta from third countries and cereals 35.1% (with soft wheat and spelt flours alone representing 29.4%).

- In 2024, all organic mixed food preparations and ingredients imports came from Sri Lanka. All organic cereal imports originated from the United Kingdom.

Imports from other Member States

- Italy is the main exporter of organic products to Malta, with several other countries also supplying the market, including France, Spain, Belgium and Germany.

Luxembourg

- Luxembourg is highly dependent on organic imports, especially for fruits & vegetables, despite the growing availability of local organic products.

Imports from third countries

- In 2024, the volume of organic products imported directly from third countries fell by 4.1% compared to 2023, reaching 13 tonnes (or 0.0005% of the EU organic imports). The decrease compared to 2018 is 97% (imports had already fallen sharply from 2019).

- In 2024, the only third countries that exported organic products were India (95.1% of volumes) and the United States (4.9%).

- In 2024, India exported only coffee to Luxembourg. The United States exported mainly tea (75.4%) to Luxembourg.

- In 2024, coffee represented 95.1% of the organic volumes imported by Luxembourg from third countries.

Imports from other Member States

- Italy is the main source of organic products imported by Luxembourg from the EU. Luxembourg also buys organic products from Germany, Belgium, France and the Netherlands.

Organic exports

- This includes both exports to third countries and to other EU Member States.
- The United States, Canada, China and Japan are the main third countries to which EU organic products are exported.
- A number of EU countries are seeking to develop their organic exports to China.
- EU organic products are also sold in other countries such as Switzerland[1], Russia, Mexico, South Korea and Australia.
- Italy, Spain, the Netherlands, France, Poland and Denmark are the main EU exporters of organic products.

Italy

- In 2024, Italian organic exports increased by 7% compared to 2023, reaching €3.897 billion. They have multiplied by 2.7 in ten years.
- Italy exports a lot of organic fruit, vegetables and wine[2]. It also sells dairy products, olive oil, canned vegetables, pasta and bakery products abroad.
- In 2024, the main EU destinations for Italian organic products were Germany, France, Scandinavia and Benelux.
- Regarding organic exports outside the EU, important destinations are the United States, Switzerland, the United Kingdom, Canada, Japan and China.
- The German market remains the main destination for Italian organic wine in the EU, ahead of the Scandinavian countries and the Benelux.
- According to Nomisma, the number of Italian organic exporting companies is expected to grow in the coming years.

Spain

- In 2024, Spanish organic exports increased by 27.5% compared to 2023, reaching €3.884 billion, a figure still slightly higher than the size of the Spanish organic market. Organic exports have quintupled since 2015.
- In 2024, Spanish trade balance for organic products stood at €3.102 billion, compared to €1.567 billion in 2023.

The trade balance is mainly driven by the surplus in the vegetable sector, which reached €3,157 million, with nearly €3.9 billion in exports against €711 million in imports. In contrast, products of animal origin maintained a negative balance of €48.5 million, with €15.5 million in exports and €64 million in imports. Spanish organic exports are therefore primarily plant-based products.

1- The EU is the main supplier of organic products to Switzerland.
2- Wine accounted for 19% of Italian organic exports in 2024.

- In 2024, Spanish main organic exports remained similar to those of 2023: fresh vegetables (cucumber, pepper and tomato), nuts (almonds and pistachios), extra virgin olive oil, wine and berries. Exports of processed products remain low, except for oil, wine and spices. Indeed, Spain does not have sufficient organic processing facilities.

- In 2024, the main destinations were Germany, France, the Netherlands, the United States, South Korea, the United Kingdom, Switzerland and Japan.

The Netherlands

- The Netherlands imports organic products from the EU and third countries and re-exports a significant portion of them.

- In 2020, Dutch organic exports amounted to €1.3 billion.

- Fruits & vegetables are the main organic products exported.

- The main EU destinations for Dutch organic products are Germany and the Nordic countries.

France

- In 2024, France exported €1.164 billion worth of organic products, representing a 10% increase compared to 2023 and a 2.7-fold increase in ten years.

- In 2024, 57% of French organic exports were destined for the European Union and 43% for third countries.

- In 2024, wine[1] accounted for 56% of French organic exports, ahead of grocery products (22%) and fruits & vegetables (10%). 67% of organic wine sold in 2024 was exported.
Champagne accounted for over 60% of the value of organic wine exports in 2023.
France also exports many other categories of organic products: meats, cured meats, dairy products[2], eggs, poultry, aquaculture products[3], ciders…
Although wine dominates, French organic exports have diversified over the decade. In 2014, wine represented two-thirds of French organic exports.
In 2024, the value of organic exports increased for several product categories: grocery products, non-alcoholic beverages, wine, dairy products and fresh fruits & vegetables.

1- In 2024, 10% by volume and 5% by value of French wine exports were organic.

2- Mainly cooked pressed cheeses, notably Comté, but also uncooked pressed cheeses.

3- Some French organic oysters and mussels are exported to Spain and Italy, while a modest share of smoked trout and salmon products is exported to neighbouring countries.

- Organic products destined for the European Union are mainly wine and grocery products.
Wine is also the most exported French organic product to third countries.

- Within the EU, Germany is a key market for French organic products. France also exports organic products to other Member States, such as Belgium, Spain and Italy.

- The United Kingdom, Switzerland and the United States are important third-countries markets for French organic products.

- In 2024, French organic trade balance was negative with -€1.18 billion. This represents an improvement compared to 2022 (-€1.38 billion) and 2023 (-€1.29 billion). However, it has worsened by 139% since 2014.

Poland

- In 2023, Polish organic exports were estimated at €800 million.

- The vast majority of Polish organic exports are destined for other Member States, primarily Germany, France, the Netherlands, Italy and the Czech Republic[1].

- Its main third-countries clients are the United Kingdom, Ukraine and Russia. It also exports to other, more distant countries, notably Mexico and to Asia.

- Poland exports, in particular, organic fresh and processed fruits & vegetables[2], cereals, cereal-based products, chicken and honey.

Denmark

- In 2024, Denmark exported €489 million worth of organic products, an increase of 4.2% compared to 2023. Danish organic imports have more than doubled in ten years and have increased more than fourteenfold in twenty years.

- In 2024, Danish organic trade balance was negative with -€96 million. However, it improved compared to 2022 (-€245 million) and 2023 (-€199 million).

- In 2024, dairy products (including milk) remained Danish main organic export category, representing 26.9% of its total organic export value. Meat and meat products came in second with 17.4% of exports.

- In 2024, 84% of Danish organic exports were destined for Europe (EU and non-EU), 13.6% for Asia[3] and 2.2% for the Americas. Twelve EU countries accounted for 87.3% of European destinations, while Norway, the United Kingdom and Turkey accounted for 5.7%.

1- For organic apples, the main destinations are Scandinavia and Spain.
2- Including several types of frozen berries, as well as apples.
3- 6% for China in 2023.

- In 2024, the main EU destinations for Danish organic products were Germany (48.1% of Danish organic exports by value), Sweden (11.3%) and The Netherlands (4.1%).

- In 2024, Denmark mainly sold dairy products and eggs[1] (35%) and meat and meat products (26.6%) to Germany.

- In 2024, Denmark mainly sold fruits & vegetables (25.5%) and dairy products and eggs (13.1%) to Sweden.

- In 2024, Denmark mainly sold dairy products and eggs (32.8%) and meat and meat products (31%) to The Netherlands.

- In 2024, Denmark mainly exported miscellaneous food products and preparations (48.5%) and dairy products and eggs (40.1%) to Asia.

Ireland

- Irish organic exports exceed €200 million.

- Meat and salmon remain the main organic exported products.

- In 2023, Ireland exported nearly two-thirds of its organic beef production by volume. Germany was its primary market (25% of its production), followed by the United Kingdom (22%) and the Netherlands (5%). Also in 2023, Ireland exported half of its organic lamb production, mainly to Germany and Belgium. One of the goals of Irish organic strategy is to triple organic beef exports and quintuple organic lamb exports by 2027.

- In 2025, Ireland exported over €100 million worth of organic salmon, primarily to other EU countries. The main markets for Irish organic salmon are France, Poland[2], Germany, Belgium and the United Kingdom. Ireland also sells organic salmon to other countries, including Italy, Spain, the Netherlands, Sweden, the United States and Canada. Ireland also exports organic seafood, mainly mussels.

- Ireland also exports part of its organic dairy products, although most are consumed domestically. Exports mainly concern cheeses (90% of Irish organic cheese production was exported in 2023) and a small amount of yogurt. The Irish Ministry of Agriculture aims to double organic yogurt exports by 2027.

- In 2023, Ireland also exported 60% of its organic oat production. Half of its exports by volume were destined for the United Kingdom.

- Ireland also exports about 5% of its organic egg production.

1- These two categories are not separated in the data by country. Denmark exports far more organic dairy products than organic eggs.

2- Important for processing

Austria

- Austrian organic exports very likely exceed €200 million.
- Dairy products (milk, yogurts and cheeses) are the main Austrian organic exports, primarily to other EU countries, especially to Germany, Italy and France.
- Austria also exports other categories of organic products, including fruits & vegetables, cereals and other arable crops, eggs and processed products.

Romania

- In 2022, Romania's organic exports totalled €200 million.
- Romania exports a large part of its organic production, both to other EU countries and to third countries.
- The main EU destinations for Romanian organic products are Austria, Germany[1], France, Italy and Denmark.
- Regarding third countries, it exports organic products mainly to the United States[2] and Japan.
- Romania exports cereals (wheat, barley and maize) and oilseeds and protein crops (sunflower, rapeseed, flax, soybean and peas), dairy products, honey, as well as some processed products, fresh and processed fruits & vegetables, medicinal and aromatic plants, oils and other processed products.

Czech Republic

- In 2023, the Czech Republic exported more than half of its organic production by value.
- In 2023, Czech organic exports amounted to €176 million, representing a 12.1% increase compared to 2022. They have more than tripled compared to 2015.
- In 2023, the Czech Republic exported 89% of its organic products by value to the European Union. Germany was the top destination (39% by value), followed by Austria (18%) and Slovakia (18%).
- The Czech Republic exports, among other things, organic cereals and beef.

1- Romania exports large quantities of organic arable crops to Germany.
2- It exported over 36,000 tonnes of organic products to the United States in 2022.

Sweden

- Swedish organic exports are estimated at €100 million.

- 96% of Swedish organic exports go to Europe (including non-EU countries). The main destinations for Swedish organic products are Germany, Denmark, France and the United Kingdom.

- Sweden exports, in particular, cereals (including oats, rye and wheat), cereal-based products, processed berries and jams.

Finland

- In 2022, Finnish organic exports amounted to €59 million, representing an increase of 5.4% compared to 2020.

- Finland exports its organic products to around forty countries, mainly within the EU (particularly to Germany, Sweden, Denmark and the Netherlands), but also to third countries in Europe, Asia (China, Japan and South Korea) and North America, mainly to the United States.

- Finnish organic exports mainly consist of cereal-based products (notably oats), dairy products, berries (cranberries, blueberries and other Nordic berries), birch sap, potato starch, organic confectionery (including liquorice sweets), as well as other processed products (including beverages and baby food).

Latvia

- In 2022, Latvian organic exports amounted to €51 million.

- Latvia exports a significant share of its organic production.

- Latvian organic products are mainly exported to other EU countries, including Germany, Sweden, Lithuania, Estonia, Benelux and Scandinavia.

- Latvian organic exports are mainly focused on unprocessed organic cereals, potato starch, dairy products, beef and honey. Exports of fruits (especially berries) and cereal-based products are also growing.

Lithuania

- Lithuania exports a significant share of its organic production [1].

- In 2017, Lithuanian organic exports amounted to €45 million.

- Lithuania exports its organic products mainly to other EU countries, including Germany, Poland, Latvia and Estonia.

1- About 80% of its organic cereals production.

- Lithuania also sells some organic products to third countries, such as the United Kingdom, Norway, the United States or Japan, although these flows remain less significant than those directed towards the EU.

- Its exports mainly consist of unprocessed organic cereals, accompanied by dairy products, meat, various processed products and honey.

Estonia

- In 2022, Estonian organic exports amounted to €41 million, representing a 42% increase compared to 2021.

- Estonia mainly exports its organic products to EU countries, especially Germany, Latvia, Lithuania, Poland, Finland, Denmark, the Netherlands, Sweden and Italy.

- It also exports to third countries, including the United Kingdom, the United States[1] and Norway.

- Estonia's main exports are cereals (primarily oats), oilseeds, pulses, potato starch, frozen berries, medicinal and aromatic plants, beverages, prepared meals and cereal-based products. Animal products accounted for only 7.5% of Estonian organic exports in 2022.

Germany

- Germany exports organic products to many other European Union countries (including France, the Netherlands, Austria, Italy, Czech Republic and Poland) and third countries (including the United Kingdom and the United States).

- Germany exports, in particular, processed organic products and fresh fruits & vegetables.

Hungary

- Between 82% and 90% of Hungarian organic production are exported in the form of raw materials.

- In 2022, Hungarian organic exports amounted to €20 million.

- Hungary exports most of its organic products to other EU member states (primarily Germany, Austria, the Scandinavian countries, Italy and France), but also to a lesser extent to Switzerland.
Most of the organic raw materials return to the Hungarian market after being processed in countries such as Germany or Austria.

- Hungarian main organic exports are cereals and oilseeds. It also exports small volumes of organic fish.

1- In 2022, it exported over 43,000 tons of organic products to the USA.

Belgium

- Just like the Netherlands, Belgium re-exports some of the organic products it imports from third countries.

- Its main EU markets are the Netherlands, Germany, France and Italy. It also exports organic products to third countries, mainly the United States.

- Belgium exports a wide range of organic products, including both processed products (chocolate, beer, sauces, juices, flour, etc.) and fresh products such as fruits[1] & vegetables, as well as dairy products.

Bulgaria

- The vast majority of Bulgarian organic production is destined for export rather than domestic consumption, where demand remains relatively modest.

- The European Union represents the bulk of its market. Germany, France, Poland, Greece and Denmark are its main EU customers.

- It also exports organic products to third countries, although in smaller volumes than to the EU, particularly to the United States, China and Japan.

- Bulgaria mainly exports medicinal and aromatic plants, essential oils (rose and lavender), honey, berries and other fruits, cereals, oilseeds, wines and sunflower oil.

Portugal

- The majority of Portuguese organic exports are destined for other Member States, primarily Spain, France, Germany and Italy.

- Portugal also exports organic products to Brazil and the United States.

- Portugal mainly exports olive oil, olives and organic wines to other EU countries.

Greece

- The European Union is the main destination for Greek organic exports, with Germany, France and Italy leading the way.

- Greece exports olive oil, wines and fruits & vegetables, honey, feta cheese and organic aromatic and medicinal plants.

Croatia

- In 2022, Croatia's organic exports amounted to €2.9 million.

1- Including nuts

- Its exports are mainly to other countries in the European Union, particularly Germany, Italy and Austria.

- Croatia exports fresh and processed fruits & vegetables, cereals and cereal-based products.

Slovakia

- Slovak organic exports remain limited compared to those of many other member states.

- They are mainly sent to other EU countries, especially primarily Germany, the Czech Republic, Poland and Austria.

- Slovakia exports, in particular, cereal-based products, dairy products (butter and milk), beverages and organic confectionery.

Slovenia

- Slovenia exports few organic products.

- The main countries buying Slovenian organic products are Italy, Germany, Austria and Croatia.

Cyprus

- Cyprus exports small quantities of organic products to its neighbouring EU countries.

- It exports organic cheeses[1], citrus fruits, avocados and olive oil.

Luxembourg

- Luxembourg's organic exports remain marginal.

Malta

- Malta does not appear to export any organic products.

1- Including halloumi

Focus on organic crop production in the European Union

Cereals, oilseeds, protein crops and pulses: over 3.3 million ha gown organically in 2024

- According to our estimates[1], the area of these crops grown organically in the European Union exceeded 3.3 million hectares in 2024, nearly double the area in 2014.

- France has held the top position since 2015. However, its area of these crops grown organically fell by 12.4% in 2024 compared to 2023, reaching 651,554 hectares. Over the decade, it has nevertheless tripled, making France the country with the largest absolute increase in organic area for these crops.
In 2024, French areas were mainly located in Occitanie and Nouvelle-Aquitaine.
In 2024, 5.6% of French areas for these crops were grown organically.

- Germany ranked second in 2024, with 486,909 hectares. Its area fell by 7.0% in 2024 compared to 2023 but has doubled since 2014.

- In 2024, Italy ranked third with 397,201 hectares, a decrease of 9.7% compared to 2023, but an increase of 63% compared to 2014.

- In 2024, Spain ranked fourth, with 317,482 hectares, a decrease of 3% compared to 2023, but an increase of 55% compared to 2014.

Cereals: over 2.5 million ha in 2024

Production

- According to our estimates, the area of organically grown cereals fell by 7.2% in 2024, reaching over 2.5 million hectares. This represented about 5% of the total cereal area in 2024.

- In 2024, 64% of the organic cereal area was located in five countries: France[2] (19%), Germany (16%), Italy (12%), Spain (10%) and Poland (6%).

- In 2024, Austria was the country with the highest share of cereal area grown organically, at 17.6%.

- The area of organically grown soft wheat and spelt was estimated at around 712,000 hectares in 2024. Germany and France are the main producers of this cereal group. Cyprus is the only country not producing them organically.

1- Since Eurostat no longer publishes areas grown organically by species or crop group, but only certified areas, some data for 2023 and 2024 are missing. We can therefore provide only estimates of total EU organic areas.

2- In 2024, France remained the leading EU producer of conventional cereals.

- Oats and barley followed in 2024, with around 437,000 hectares and 327,000 hectares respectively. Spain remained the leading producer for these crops in 2024.

- The area of organically grown rye was estimated at 205,000 hectares in 2024, with Germany remaining the leading producer.

- In 2024, Italy remained the leading country for organically grown durum wheat and rice.

Market

- In Germany, bakery sales of organic bread rose by 6.6% in value in 2024 compared to 2023, organic flour by 9.7% and fresh pastries by 16.9%.
In 2025, organic flour sales increased by 13.6% in volume compared to 2024, accounting for 21.6% of total flour sales by volume. Organic bread sales grew by 0.9% in volume, bringing its organic market share to 4.7% in 2025.
Major supermarket chains such as Edeka, Rewe and Aldi have significantly expanded their organic bakery ranges in recent years.
Although Germany ranks second for organic cereal area, it is a net importer. The import share varies by cereal type and year, ranging from 10% to 25%[1]. It imports significant quantities of organic rice, mainly from Italy, which accounted for 60% of imports in 2023.

- The French market for organic bakery and fresh pastry products was estimated at €924 million in 2024 (+1.5% vs 2023). This sector accounted for nearly 8% of the French organic market in 2024.
In 2024, the exceptionally poor cereal harvest (-42%) and the deliberate reduction of stocks through forced downgrading in 2023/2024 led to imports of 46,000 tonnes in the 2024/2025 season, compared to 1,615 tonnes in the 2023/2024 season.

- In 2024, sales of organic cereal-based products in Danish mass distribution amounted to nearly €192 million, a decline of 7.3% compared to 2023.
In Denmark, the most popular organic cereal products are oatmeal (organic market share by value in 2024: 50.4%) and flour (29.8%).

- In Finland, breakfast cereals in flakes are the most popular, with an organic market share by value of 11.0% in 2024.

- In Belgium, the organic market share by value was 10.8% for bread, 3.2% for pasta and 6.5% for rice in 2024.

- In Austria in 2024, organic products accounted for 13.5% of bread purchases by value in supermarkets, 19.9% of pastries and 26.1% of flour.

1- 11% for all cereals in 2023/2024.

- In Sweden, the most popular organic cereal products are oatmeal (organic market share by value of 23.9% in 2022) and flour (9.6% in 2024).

Oilseeds: France and Romania Leading in 2024

Production

- According to our estimates, around 421,000 hectares of oilseeds were grown organically in the European Union in 2024, i.e., over 3% of the EU oilseed area.

- In 2024, France and Romania remained the UE main producers of organic oilseeds.

- The share of oilseed area grown organically varies greatly between countries, ranging from 0.6% in Bulgaria to 31.0% in Austria in 2023. In France, it was 5.3% in 2024.

- According to our estimates, sunflower remained the main organic oilseed grown in the European Union in 2024, with around 188,000 hectares. Romania and France were likely the main producers of organic sunflower.

Market

Oils

- In Germany in 2024, organic products accounted for 7.0% of sunflower oil purchases by volume and 5.4% of rapeseed oil purchases.
In 2025, organic oil sales increased by 1.3% in volume in Germany. Organic products represented 13.1% of total oil sales by volume in 2025[1].

- In France, oil consumption remains the main use of oilseeds in human nutrition. Household consumption of organic cooking oils in France was estimated at 41,100 tonnes in 2024 (+1.8% vs 2023). Available data do not allow a breakdown by oil type, although olive oil accounts for the vast majority of volumes. The growth in olive oil consumption and its price increase in 2024 strongly contributed to the expansion of the savoury grocery segment in the organic market.
In 2024, organic products accounted for 17.4% of the total value of oils sold in France. France imported 97 tonnes of organic sunflower oil in 2024, a decrease of 83% compared to 2023.

- A few other countries stand out for the high share of organic products in oil sales by value: Denmark (34% in supermarkets in 2019), Finland (12% in 2024) and Sweden (9.4% in 2021).

Soy-based products

- Animal feed is by far the main use of organic soy in the EU. In 2022, it accounted for over three-quarters of total soybean use (around 355,000 tonnes out of 470,000 tonnes used, excluding exports).

1- Compared to 12 % in 2023

- Member states depend on imports from third countries for soybeans used in animal feed.

- In 2022, Germany, France, Romania, Italy and Austria together accounted for 85% of the volumes of organic soybeans used for animal feed in the European Union.

- France imports organic soybeans, mainly for animal feed. Togo is the main origin. However, soybean imports fell sharply between 2023 and 2024.

Protein crops and pulses: around 23% of EU organically grown areas in 2024

- According to our estimates, protein crops and pulses were grown organically on around 405,000 hectares in 2024, representing about 23% of the EU area of this crop category.

- In 2024, the main EU producers of these organic crops were Germany (64,718 hectares), Italy (54,177 hectares), France (50,448 hectares) and Spain (46,642 hectares).

- In 2024, Denmark remained the country with the highest share of its protein crop and pulse area grown organically: 43.3%.

- In 2024, organic products accounted for 16.4% of the value of pulses sold in France. However, consumption of organic pulses fell by 2.3% in volume compared to 2023.

Organic sugar beet: mainly grown in Germany

- According to our estimates, nearly 15,000 hectares of sugar beet were grown organically in the European Union in 2024. This still represented only 1% of the EU sugar beet area.

- Germany accounted for half of the area in 2024 with 7,300 hectares (+14.1% compared to 2023). However, only 1.9% of German sugar beet area was grown organically in 2024. The main production regions are Bavaria, Saxony, North Rhine-Westphalia and Lower Saxony.
A significant share of organic sugar beet production from southern Germany is destined for a Swiss processing plant, Sugar Factory Aarberg & Frauenfeld S.A. About half of the sugar produced there is sold in Switzerland and the rest is shipped back to Germany.

- France[1] ranked second in 2024, with 1,892 hectares, representing 13% of the EU area. However, its organic sugar beet area fell by 18.2% in 2024 compared to 2023. Cristal Union continues to produce sugar from organic sugar beets but reduced its production in 2024. Terreos stopped producing organic sugar in 2024.

1- In 2024, France remained the leading EU sugar producer (organic and conventional), the second-largest producer of beet sugar in the world and the ninth-largest sugar producer globally.

A small cooperative organic sugar factory is expected to open late 2026 in Hauts-de-France. Named Fabrique à Sucres[1], it will produce whole organic beet sugar. Production is expected to be modest initially, with the long-term goal of producing 2,500 tonnes of organic sugar per year.

- Italy ranked third in 2024, with 1,512 hectares, representing about 10% of the EU area. Its organic sugar beet area increased by 15.2% between 2023 and 2024.
Organic sugar beet is grown in several regions of northern and central Italy, including Piedmont, Lombardy, Friuli Venezia Giulia, Marche, Umbria, Emilia-Romagna and Veneto.
Only 3.6% of Italian sugar beet area was grown organically in 2024. Italy aims to reach 80% of its sugar beet area under organic cultivation within a few years.

- Austria ranked fourth in 2024, with nearly 9% of the EU sugar beet area, or 1,303 hectares. Austrian organic sugar beet area increased by 35.1% in 2024 compared to 2023. The main production regions are Lower Austria and Burgenland.
In 2023, 3.7% of Austrian sugar beet area was grown organically.
In 2023, 40,500 tonnes of organic sugar beets were harvested in Austria, producing over 4,000 tonnes of organic sugar.

- In 2024, around ten sugar factories in the EU produce organic sugar.

- The European Union imports organic sugar, mainly from sugarcane and sugar beets, from third countries. In 2024, total organic sugar imports amounted to 162,605 tonnes, an increase of 7.8% compared to 2023.
In 2024, Colombia was the main supplier of organic sugar to the EU (28.5% of volumes), followed by Mexico (13.5%), Brazil (11.6%) and Paraguay (11.2%).

- The European organic sugar market was estimated at 175,000 tonnes in the 2023/2024 season, a decline of 27% compared to the previous season.

Fresh vegetables: A diverse organic production

All vegetables

- The area of fresh vegetables (including potatoes and strawberries) grown organically was estimated at nearly 253,000 hectares in 2024[2], representing about 11% of the EU area devoted to these crops.

- In 2024, Italy remained the leading producer of organic fresh vegetables, with 58,846 hectares, representing over 23% of the EU area. Italian organically grown vegetable area fell by 5.1% between 2023 and 2024 but has more than doubled over the past ten years. In 2024, 22.8% of Italian fresh vegetable area was grown organically.
Apulia and Tuscany are the main Italian regions for organic vegetable production.

1- Sugar Factory in French

2- Data from Poland on total organically grown vegetable area are not available for recent years. As a result, it is not possible to determine whether it still ranks third.

- France[1] ranked second with 42,428 hectares, representing nearly 17% of the EU area. Its organic vegetable area fell by 8.1% in 2024 compared to 2023 but has more than doubled over the past ten years.

- The share of vegetable area grown organically varies greatly between countries. Organic cultivation accounted for 40% of vegetable area in Luxembourg in 2023 and one-third in Denmark in 2024.
In Italy, the share of organic vegetables was 14.8% in 2023 and in France[2] it was 9.5% in 2024.

- The distribution among different vegetable categories varies considerably between countries. Germany stands out with a substantial share of potatoes (39% of organically grown area of vegetables in 2023), while legumes account for a large portion of organic vegetables in Italy (30% in 2024). In France, production is fairly diversified, with field vegetables (a mix of vegetable crops grown in the same field) in first place, followed by potatoes, squash and cabbage.

Potatoes

- Around 35,000 hectares of potatoes were grown organically in the EU in 2024, representing over 2.5% of the EU potato area.

- In 2024, Germany remained the leading EU producer of organic potatoes, with 13,200 hectares, representing about 38% of the EU area. Its organic potato area increased by 6.5% in 2024 compared to 2023.
In 2024, 4.8% of German potato area was grown organically. Lower Saxony remained the main region for organic potato production in Germany.

- France ranked second with 4,546 hectares (about 13% of the EU) and Austria third with 3,627 hectares (nearly 11%).
In 2024, 2.1% of French potato area was grown organically, compared to 16.1% of Austrian area in 2023.

Strawberries

- Around 3,200 hectares of strawberries were grown organically in the EU in 2024.

- In 2024, Poland[3] remained the leading EU producer of organic strawberries, with 1,087 hectares, representing about one-third of the EU organic strawberry area. Only 3.3% of Polish strawberry area was grown organically in 2024.

- Bulgaria stood out with 30.8% of its strawberry fields grown organically in 2023.

1- In France, the main regions for organic vegetable cultivation are Brittany and Nouvelle-Aquitaine.

2- This refers to the share including potatoes (including those grown for starch).

3- Poland was the second-largest producer of strawberries (organic and conventional), behind Spain, in 2023 and 2024.

Organic fruits: Spain and Italy leading

All fruits

- The UE area of fruits[1] grown organically was estimated at around 1.4 million hectares in 2024.

- In 2024, Spain remained by far the leading EU producer, with nearly 46% of the EU organic orchard area, i.e., 636,424 hectares. However, Spanish orchard grown organically declined by 2.1% in 2024. Andalusia remained the main Spanish region for organic fruit production in 2024.

- Italy remained in second place in 2024, with 423,378 hectares (+1.7% vs 2023), representing about 30% of the EU orchard grown organically. A quarter of Italian orchard area was grown organically in 2023.

- As with vegetables, the share of orchards grown organically varies greatly between countries. Austria stood out with 45.9% in 2023, while France reached 30% in 2024.

- The distribution among different fruit categories is not the same across countries. In Spain, Italy, Greece and Portugal, olives are the main organically grown fruit. In France, temperate fruits make up the largest share of the orchard grown organically.

Olives

- According to our estimates, nearly 669,000 hectares of olive groves were grown organically in the EU in 2024. This represented over 15% of the EU olive grove area.

- In 2024, Italy remained in first place with 43% of the area, i.e., 288,951 hectares (+3.3% vs 2023).
In 2024, 29.3% of Italian olive groves were grown organically[2].
In 2024, the main production regions remained Apulia (32% of the area) and Calabria (23%). In 2024, 26% of Apulian olive groves were grown organically and 42.5% of Calabrian.
In 2023, Italy produced nearly 1.5 million tonnes of organic olives. Almost all of Italian organic olive production is used for oil production.

- In 2024, Spain ranked second[3] with nearly 43% of the area, or 284,335 hectares (-2.9% vs 2023).
In 2023, 11.2% of Spanish olive groves were grown organically.
Andalusia[4] is the leading EU region for organic olive oil production.
Spain produced nearly 364,000 tonnes of organic olives in 2024, the vast majority of which was used for oil production.
Olive oil represents a significant share of Spanish organic exports.

1- This chapter does not cover strawberries and grapes.
2- Compared to 52% in France
3- While it is the EU leading producer of olives in conventional farming.
4- Nearly half of the olive grove area is grown organically.

- However, the EU imported 35,600 tonnes of organic olives and olive oil in 2024, a decrease of 23% compared to 2023. In 2024, 97.8% of organic olive and olive oil imports came from Tunisia.
In 2024, 99% of imported organic olive oil was extra virgin.
More than two-thirds of organic olives and olive oil imported from third countries entered the European Union through Italy in 2024.
In 2024, France imported nearly 4,400 tonnes of organic olives and olive oil from third countries, about 90% of which came from Tunisia.

- France and Germany are the main EU markets for organic olive oil.

- In 2024, organic products accounted for 29.4% of German olive oil purchases by volume.
In the country, a large share of organic olive oil and organic olives is sold under private labels, both in organic shops and in mass distribution.
Biofach launched an award for organic olive oil in the 2010s.

- In Italy, over two-thirds of organic olive oil consumption occurs in the northern part of the country. Sales of packaged organic olive oil exceeded €47.5 million in 2022 (5.2% of olive oil purchases), totalling around 6 million litres.

- In Belgium, sales of organic olive oil are steadily increasing.

Nuts

- The UE area of organically grown tree nuts was estimated at around 450,000 hectares in 2024, representing over 32% of the total area devoted to these fruits.

- Spanish organic tree nut area declined by 1.0% in 2024, reaching 307,059 hectares, or about 68% of the EU's total orchard area. In 2024, 17% of this area was under conversion. More than one-third of Spain's tree nut orchards were grown organically in 2024.
Spanish organic nuts production amounted to over 101,000 tonnes in 2024, with 30.5% produced in Castilla-La Mancha, 22.3% in Andalusia and 19.1% in the Valencian Community.
Almonds remained the main product in 2024, accounting for 77% of organic volumes, followed by chestnuts at 8%.
In 2023, 34% of almond orchards were grown organically, along with 13% of chestnut orchards and 12% of walnut orchards.

- Italian organically grown tree nut area increased by 4% in 2024, reaching 66,787 hectares (15% of the EU orchard area). In 2024, 23% of this area was under conversion. More than one-third of Italian nuts orchards were grown organically in 2024.
Sicily remained the leading production region, with 24% of the area in 2024, followed by Campania (nearly 21%) and Lazio (17%). In Sicily, 47% of the nuts orchards were grown organically in 2024.
In Italy, production is more diversified than in Spain, with one-third of the orchard area dedicated to almonds, nearly one-third to hazelnuts and 28% to chestnuts.
In 2023, 42% of chestnut orchards, 40% of almond orchards, 32% of walnut orchards and 24% of hazelnut orchards were grown organically.

Temperate stone and pome fruits

- The EU area of organically grown stone fruits and pome fruits was estimated at around 132,000 hectares in 2024, representing nearly 12% of the area devoted to these crops in the EU.

- In 2024, France had the largest organic temperate fruit orchards in the EU, with 31% of the area, or 41,086 hectares, down 1.4% compared to 2023.
In 2024, 44.3% of French temperate fruit orchards were grown organically. Apple trees, with 16,929 hectares, accounted for 41% of the French organic pome fruit orchards in 2024.

- In 2024, Italy ranked second, with 25,565 hectares, representing 19% of the EU organic temperate fruit orchards. However, its area declined by 8% in 2024 compared to 2023.

- In 2024, Poland ranked third, with around 8% of the EU orchard area.

- In 2024, apples remained the leading temperate fruit grown organically, ahead of plums[1]. Nearly 60,000 hectares of apple trees were grown organically in 2024, representing about 45% of the EU organic temperate fruit orchards.

- With a production of 117,600 tonnes in 2024, Poland[2] remained the leading EU producer of organic apples, despite a 7% decline compared to 2023. Italy[3] ranked second, with 103,000 tonnes, followed by Germany (55,000 tonnes) and Austria (14,000 tonnes).

- In 2024, the main organic apple varieties produced in the European Union, in descending order of volume, were: Gala, Topaz, Golden, Elstar, Braeburn, JonaGold and Pinova.

- In 2023, 5% of Polish apple orchards were grown organically. In 2024, the share in Italy was 12.2%.

- Poland exports its organic apples mainly to Scandinavia and Spain, while the main destinations for Italian organic apples are Germany and France.

Citrus

- In 2024, the area citrus orchards grown organically was estimated at around 59,000 hectares, representing about 11% of the EU citrus orchard area.

- In 2024, Italy remained first in terms of area, with 31,302 hectares, representing nearly 53% of the EU organically grown citrus orchards. Italian organic citrus area declined by 5% in 2024 compared to 2023.

1- 12% of the EU temperate fruit orchards were grown organically in 2024.

2- In 2024, weather conditions in Poland were unfavourable for apple production.

3- In Italy, organic apples are mainly produced in Val Venosta, in Trentino-Alto Adige.

In 2024, 27.9% of Italian citrus orchards were grown organically and 18% of the area was under conversion.
That year, 56% of the EU organic citrus orchards were located in Sicily. In this region, 28.6% of citrus orchards were grown organically in 2024.
Oranges remained the main organic citrus in Italy in 2024, accounting for 43% of the organic citrus area. One-fifth of the organic orange orchards were under conversion in 2024.

- Spain ranked second, with 24,432 hectares in 2024 (41% of the EU organically grown citrus orchards), down 5% compared to 2023.

In 2024, 8.3% of Spanish citrus orchards were grown organically and 14% of the area was under conversion.
Spain produced nearly 691,000 tonnes of organic citrus in 2024, an increase of 1.8% compared to 2023.
Lemons and limes were the main organic citrus produced in Spain in 2024, totalling nearly 292,000 tonnes (over 42% of organic citrus volumes), followed by oranges (almost 40% of volumes).
Andalusia remained the main region for organic citrus production in 2024, accounting for 59% of volumes produced.
Germany and France are the main markets for Spanish organic citrus, followed by Scandinavia, the Benelux countries, Switzerland and Austria.

Berries

- According to our estimates, around 41,000 hectares of berries[1] were grown organically in the EU in 2024, representing over 22% of the EU area devoted to these crops.

- Poland likely remained the leading country in terms of area. However, we do not have recent figures for its organic berry orchards[2]. In 2023, Poland produced over 52,000 tonnes of organic berries.

The main organic berries produced in the country are raspberries, red currants, gooseberries and blueberries. The first three are mainly grown in the Lower Carpathians, the Lublin region and Świętokrzyskie, while blueberries are primarily produced in the north and east.
Poland primarily exports processed organic berries.

- In 2024, Lithuania ranked second, with nearly 9% of the EU area. It mainly produces organic blackcurrants. Lithuanian organically grown berry area increased by 12% in 2024 compared to 2023. In 2024, 44% of the country's berry area was grown organically.

- In 2024, Germany ranked third, with over 7% of the EU berry area. Its organic berry area increased by 3% between 2023 and 2024. In 2024, 32% of German berry area was grown organically.

1- Excluding strawberries.
2- In 2019, nearly 16,000 hectares of berries were grown organically in Poland.

Aronia and blueberries are the two main organic berries grown in the country. In 2024, organic cultivation accounted for 85.5% of aronia area in Germany. In 2024, two-thirds of the organic blueberries produced in Germany came from Lower Saxony.

Tropical and subtropical fruits

- According to our estimates, around 27,000 hectares of tropical and subtropical fruits were grown organically in 2024.

- In 2024, Spain was the leading EU producer of organic tropical and subtropical fruits, with 10,342 hectares, representing nearly 39% of the EU orchard area. Spanish organic fruit area declined by 0.9% in 2024 compared to 2023.
In 2024, 13% of Spanish tropical and subtropical fruit orchards were grown organically.
Spain produced nearly 129,000 tonnes of organic tropical and subtropical fruits in 2024, an increase of 1.2% compared to 2023.
Andalusia remained the main region for organic tropical and subtropical fruit production in Spain, accounting for 59% of the area and 70% of production in 2024.

- In 2024, Italy ranked second with 10,175 hectares, representing 39% of the EU orchard area. However, Italian orchard area declined by 8.7% in 2024 compared to 2023.
In 2024, 26% of Italian tropical and subtropical fruit orchards were grown organically.

- In 2024, France ranked third with 3,344 hectares, representing nearly 13% of the EU orchard area. Its organic fruit area increased by 12% in 2024 compared to 2023.
In 2024, 9% of French tropical and subtropical fruit orchards were grown organically.

- In 2024, kiwis accounted for 52% of organically grown tropical and subtropical fruit area in Italy and 26% in France, while they represented only 2% in Spain.
The main organic tropical and subtropical fruits grown in Spain are avocados (51% of the area in 2024) and figs (21%).

The organic fruit and vegetable market: Highly popular products

- Organic fresh fruits & vegetables are the main category of organic products sold in several EU countries, representing over one-third of the organic market in Ireland, one-third in Denmark and nearly one-fifth in France. The most popular organic fruits & vegetables among EU consumers are bananas, apples, carrots and potatoes.

- Organic vegetables hold a significant market share in vegetable sales in several countries, especially in Austria (20.4% for potatoes and 22.3% for other vegetables in mass distribution in 2024) and in Belgium (10.3% in 2024).
Organic fruits also have a substantial market share in Austria (16.1% in mass distribution in 2024) and in Belgium (11.0% in 2024).

Germany

- Sales of organic vegetables declined by 4.3% in value in 2024 compared to 2023, while organic potato sales increased by 6.4% and organic fruit sales by 3.1%.

- In the first ten months of 2025, sales of fresh fruits & vegetables increased by nearly 8% in value compared to the same period in 2024[1].

In 2025, organic fruit sales grew by 8.1% in volume compared to 2024 and organic vegetable sales increased by 6.0%, while organic potato sales declined by 3.7%. in 2025, organic accounted for 9.5% of vegetable sales by volume, 7.7% of fruit sales and 5.9% of potato sales.

- In 2024, carrots remained the top-selling organic vegetable in Germany, while bananas continued to be the leading organic fruit, accounting for 35.7%[2] of organic fruit volumes purchased in the first half of 2024, ahead of apples (16%) and lemons (15.3%).

During the first half of 2024, organic products represented 7.1% of fruit purchases by volume, 12.5% of banana purchases and 34.9% of lemon purchases.

- Germany imports large quantities of organic fruits & vegetables, mainly from Spain, Italy and the Netherlands[3].

France

- The French organic fruit and vegetable market was valued at over €2 billion in 2024 (16.5% of the organic market), an increase of 5.9% compared to 2023, representing approximately 694,400 tonnes.

Vegetables accounted for 54% of sales by value and fruits 46%. Organic fruit sales grew by 2.7%, while organic vegetable sales increased by 8.8%, masking contrasting trends among individual crops.

- In 2024, bananas remained the best-selling organic fruit in France, both in volume (over 110,000 tonnes, up 3%) and in value (€280 million, +3.4%). Citrus fruits continued to hold second place, with sales stable at €218 million, reflecting a slight increase in volume offset by lower prices.

- In 2024, the most consumed organic vegetables in France remained tomatoes, carrots and potatoes.

- In 2024, 35.9% of organic fruits & vegetables consumed in France (by value) were imported, with 61% for vegetables and 14.3% for fruits. 56% of organic fruit and vegetable imports by value came from third countries.

1- Sales of fresh organic vegetables alone increased by 11% during the first half of 2025.

2- Compared to 20.4% in conventional

3- See the chapter on imports.

In 2024, French imports of organic fruits & vegetables increased by 2.8% compared with 2023.

Denmark

- Sales of organic fruits & vegetables[1] in Danish mass distribution amounted to €818 million in 2024, representing an increase of 6.5% compared with 2023[2]. Bananas remained the most purchased organic fruits in Denmark in 2024, ahead of citrus fruits, while carrots remained the most purchased organic vegetables.

Organic share in sales of selected fruits & vegetables in 2024 (by value)

Species	Organic share
Lemon	83.3%
Banana	62.8%
carrot	58.9%
cucumber	33.8%

Italy

- In 2024, organic fruits & vegetables still accounted for a very large share of the organic market in Italy.

- In the first half of 2025, organic fruit and vegetable sales increased by 15% in volume and 29% in value compared to the first half of 2024.

- The best-selling organic fruits & vegetables in Italy remained bananas, lemons, tomatoes, carrots, zucchini and apples.

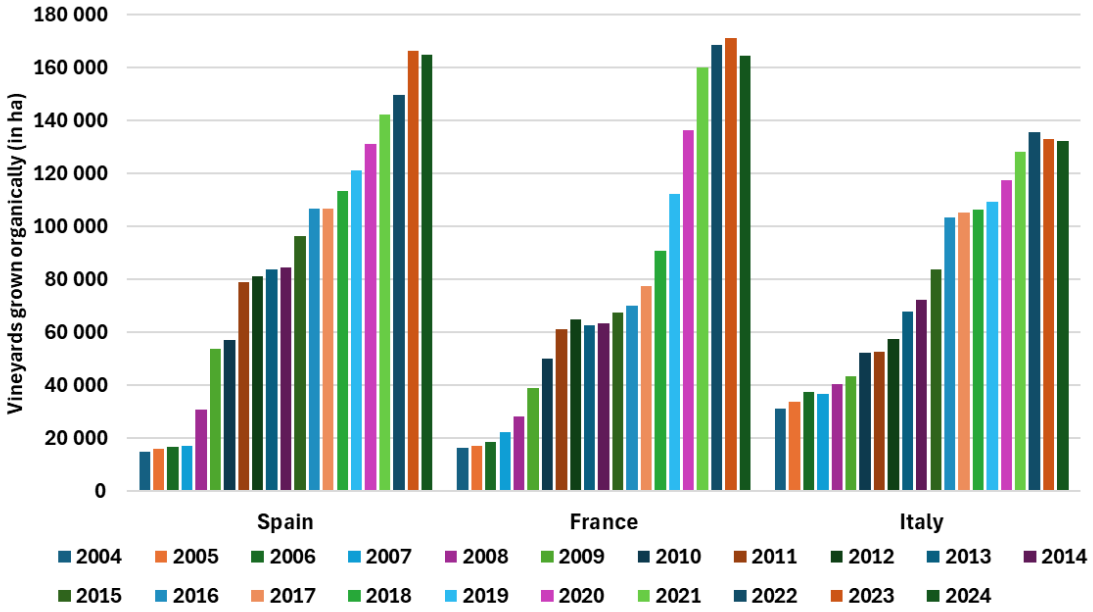
Viticulture: Spain leading in 2024

Vineyards grown organically in the EU

- The EU vineyard area under organic cultivation was estimated at around 509 thousand hectares in 2024, representing about 16% of the EU vineyard.
In 2024, approximately 91% of the EU vineyard grown organically was located in Spain, France and Italy.

1- Potatoes included
2- The increase was very similar for fruits: +6.4% and for vegetables: +6.5%.

Developments in organically grown vineyard areas in the top three EU countries



Source: Agence BIO based on various European sources

Spanish vineyards

- The Spanish vineyard declined by 0.9% in 2024, reaching 164,861 hectares. In 2024, 24% of Spanish organic vineyard was in conversion.
- In Spain, 17.7% of the vineyard was grown organically in 2024.
- The Spanish vineyard under organic cultivation has doubled in ten years and increased elevenfold in twenty years.
- In 2023, Spain had 1,419 wineries and wine bottling facilities engaged in organic activity.
- In 2024, 99.8% of Spanish organically grown vineyard was dedicated to wine grapes, totalling 164,562 hectares (a slight decline of 0.8% compared to 2023).
- Castile-La Mancha remained the main production region in 2024 (42% of organic vineyard area), followed by Catalonia (21%) and the Valencian Community (12%).
- Spain exports most of its organic wine production.
- The 2022-2027 Wine Sector Strategy includes among its key targets reaching 26% organically grown vineyards by 2027.

French vineyards

- In 2024, French organically grown vineyard declined by 4.0%, totalling 164,541 hectares. In 2024, 14% of French organically grown vineyard was in conversion (compared to 23% in 2023).

- In 2024, 21% of French vineyard was grown organically.

- Over ten years, French organically grown vineyard increased by 160%. Over twenty years, it grew tenfold.

- The organically grown vineyard accounted for 6% of French organically grown land in 2024.

- had 12,061 organic winegrowers at the end of 2024.

- In 2024, 99.4% of French organically grown vineyard was dedicated to wine grapes, totalling 163,469 hectares, of which 14% were in conversion. This area declined by 4% in 2024 compared to 2023.

- In 2024, 73% of organic grape areas were concentrated in three regions: Occitanie remained in first place with 34% of the area, followed by Provence-Alpes-Côte d'Azur (21%) and Nouvelle-Aquitaine (18%).

- In 2023[1], the volume of organic wine produced increased by 7.3% compared to the previous vintage[2], reaching 4.04 million hectolitres, or 12% of the national production volume (excluding wine for Cognac).
However, the 2023 vintage was marked by a significant downgrading (17% of the volume produced was not marketed as organic wine, compared to 23% the previous year) and an increase in stocks (2.28 million hectolitres stored, representing 54% of the 2023 vintage).

- France brought 2.85 million hectolitres of organic wine to the market in 2024 (+6.7% compared to 2023). The stock of organic wine increased by 0.65 million hectolitres.

- Four wine regions accounted for 72% of the volumes released to the market in 2024: Occitanie, Provence-Corsica, Bordeaux and Rhône.

- In 2024, France exported 44% of its volumes released to the market, or 1.27 million hectolitres. In value terms, organic wine exports amounted to €649 million[3], up 10% compared to 2023.
Organic wines accounted for 56% of French organic exports by value in 2024 and 5% of total French wine exports (10% by volume).

1- Marketed in 2024

2- The year 2023 was marked by an increase in certified harvested areas compared to 2022 and a decline in yield.

3- Of which 60% was destined for third countries and 40% for other EU member states.

Italian vineyards

- Italian organically grown vineyard remained almost stable in 2024 compared to 2023 (-0.4%), totalling 132,441 hectares. In 2024, 21% of Italian organically grown vineyard was in conversion.

- In 2023, 22.8% of Italian vineyard was grown organically.

- Over ten years, Italian organically grown vineyard nearly doubled. Over twenty years, it more than quadrupled.

- In 2024, 97.3% of Italian organically grown vineyard was dedicated to wine grapes, totalling 128,929 hectares (of which 21% were in conversion). The vineyard area for this production remained almost stable between 2023 and 2024 (-0.3%).
Organic table grape areas declined by 5.5% in 2024 compared to 2023.

- Sicily remained the main production region in 2024, with 26% of Italian organically grown vineyard, followed by Tuscany (17%) and Apulia (16%).
In 2024, Sicilian organically grown vineyard increased by 3.2%. The organic share of Sicilian vineyard reached 37.4% in 2024.
In 2024, Tuscan organic vineyard declined by 2.0% while Apulia's increased by 3.9%. Tuscany stands out for the very high share of its vineyard grown organically: 38.8% in 2024. In Apulia, 22% of the vineyard was grown organically in 2024.

- Italy produced 3 million hectolitres of organic wine in 2022, an increase of 10.6% compared to 2021. This still represented only 6% of national wine production[1]. A significant share of organic grapes is not vinified as organic or wines not labelled as organic.

- In 2023, Italian organic wine exports amounted to €670 million, an increase of 7% compared to 2022.
In 2023, organic wine accounted for 8.5% of Italian wine exports (compared to 8% in 2022).

German vineyards

- Germany ranked fourth in 2024, with 15,800 hectares, an increase of 3.3% compared to 2023.
In 2024, 15.7% of German vineyard was grown organically.

- Over ten years, German organically grown vineyard has more than doubled.

- In 2024, Rhineland-Palatinate[2] remained Germany's leading organic wine region.

1- In 2024, Italy once again became the world's leading wine producer (conventional and organic combined), surpassing France, which had ranked first in 2023. Spain ranked third.

2- It is also the main wine-producing region in Germany for conventional wine.

The EU organic wine market

- The main EU markets for organic still wine by volume are Germany, France, Sweden and Italy.

German market

- Germany is considered the leading EU market for organic wine, although no recent figures are available to support this. It is also the world's main importer of organic wine.

Organic wine accounts for between 3% and 4% of the wine market in Germany.

- The leading distribution channel is organic shops, followed by large retail. The latter have started expanding their organic wines range in recent years.

According to a BÖLN study, only 4% of wine consumers regularly buy organic wine. Organic wine buyers are more numerous among Generation X and Y.

- A large share of organic wines sold in mass distribution comes from abroad. The main origins of organic wine are Spain, Italy and France. These countries are also the main destinations for Spanish and Italian organic wines. However, Germany exports part of its organic wine production.

French market

- French consumption of organic wine reached 1.59 million hectolitres in 2024, up 5.3% compared to 2023. This represented 7% of national wine consumption.

- Sales of organic wine (excluding the catering sector) amounted to €1.45 billion in 2024, an increase of 7.7% compared to 2023. Organic wine accounted for 12% of retail sales of organic products in 2024.

- Direct sales are the main distribution channel for organic wine, accounting for 40% of sales by value in 2024, ahead of wine shops (38%). These two channels have much larger market shares in organic wine sales than in conventional wine sales[1].

In 2024, direct sales of organic wine increased by 10% compared to 2023, while sales through wine shops rose by 13%.

- In 2024, mass distribution accounted for only 14% of retail sales of organic wine in France, while organic shops accounted for 8%.

- Organic wines consumed in France are mainly of domestic origin.

Organic wine imports amounted to €28 million in 2024, an increase of 16.7% compared to 2023, representing only 2.9% of organic wine sales in France. Of these imports, 93% came from other EU countries.

- According to the 2025 edition of the Agence BIO/CSA Barometer on organic product consumption and perception, 13% of people who consume organic products at least once a month drank organic wine in 2024.

1- Direct sales account for only one in ten bottles for conventional wine, compared to three in ten for organic wine.

- Purchases of organic wine in restaurants increased by 9.5% in value in 2024 compared to 2023. Organic wine accounted for 19% of organic product purchases in restaurants in 2024.

Swedish market

- In Sweden, wines are sold through the state monopoly, Systembolaget. In 2024, organic wines reached a market share of 24.9% by volume, compared to 2.6% in 2008.

- In the foodservice sector, the share of organic wines is even higher.

- The Swedish organic wine market is considered mature.

- In Sweden, organic wine is particularly popular among Generation Y.

Italian market

- Although Italy exports a significant share of its organic wine, domestic consumption is not negligible.

- In 2023, retail sales of organic wine amounted to €57.5 million, an increase of 6.5% compared to 2022.

- Sales of organic wine are growing in large retail and wine shops. Mass distribution sales are mainly made through hypermarkets and supermarkets.
As in France, organic wines are often purchased directly from the producer.

- Almost all organic wine consumed in Italy comes from domestic production. Imported organic wines mainly come from Argentina.

- Central Italy (Tuscany, Lazio, Umbria and Marche) and Sardinia represent the main organic wine consumption area in Italy, accounting for 41.6% of sales in 2022.

- Red wines remain the most popular organic wines among Italian consumers (57% of organic wine sales in 2022), followed by white wines (36%).

- In 2022, wines with Protected Designation of Origin (PDO) accounted for 59% of organic wine sales in Italy.

- The share of organic wine in the foodservice sector is higher than in retail, with 12.6% in bars in 2022 and 17.9% in restaurants. This is explained by the large availability of organic wine in these venues, with 28% of wine bottles in bars carrying an organic label and 19% in restaurants.

Benelux market

- In the Benelux region, 25% of wine consumers consumed organic wine in 2023.

- The organic wines consumed there seem to come mainly from France and Italy.

In the Netherlands, organic wines are still niche products, but their sales are growing. The range of organic wines in mass distribution is expanding. In 2025, organic wines accounted for about 5% of the wine selection. Around 7% of the wines offered by the largest wine shop chain in the Netherlands[1] are organic. Dutch consumers increasingly look for the EU organic logo when choosing a wine. Nearly 9 out of 10 Dutch people have tried organic wine at least once.

Belgians are showing a growing interest in organic and biodynamic wines, especially in Wallonia and want more transparency. They readily support small producers.

Danish market

In Denmark[2], retail sales of organic wines and ciders increased by 2.5% in 2024, exceeding €47 million. The market share by value of organic wine in mass distribution reached 7.7% in 2024 (compared to 6.5% in 2023).

Fragrant, aromatic and medicinal plants: Around 104 thousand hectares grown organically in the EU in 2024

The area of fragrant, aromatic and medicinal plants grown organically was estimated at around 104 thousand hectares in 2024.

In 2024, the main countries cultivating these plants organically were France (over a quarter of the area), Bulgaria, Poland and Spain.

In 2024, the area of these plants in France increased by 58%, reaching 27,230 hectares, with 48% under conversion. This strong growth was driven by the rapid expansion of organic coriander, which more than quadrupled in two years. The surge was largely due to the CAP subsidy scheme, which offered €900 per hectare for non-mechanizable crops. This applied to several hectares of coriander in 2024, even though in many cases it can be sown and harvested with a combine harvester. In most cases, however, the coriander was neither harvested nor marketed. To curb this boom, some regions capped the number of hectares. Excluding coriander, areas of other plants remained largely stable in 2024.
In 2024, 46.6% of French area of these plants was grown organically. The main regions producing them organically were Occitanie (accounting for more than half of the area), Provence-Alpes-Côte d'Azur and Auvergne-Rhône-Alpes.
France produces a wide variety of fragrant, aromatic and medicinal plants organically (over 120 identified). In 2024, coriander was the leading organic crop, covering 56% of the organic area, followed by lavender and lavandin, which together accounted for 25%. The areas of these two species declined in 2024 compared with 2023.
Coriander was mainly grown in Occitanie, while lavender and lavandin were the primary organic crops in Provence-Alpes-Côte d'Azur and Auvergne-Rhône-Alpes. Thyme remained the most widely Provence herb grown organically in France.

1- Gall Gall
2- The only Nordic market without a monopoly

Organic vanilla production has been developing in Guadeloupe and Réunion since 2019, representing 60% of the organic area of fragrant, aromatic and medicinal plants in overseas territories in 2024.
France imports organic thyme from Spain and Portugal.

■ Bulgaria is a major producer of organic lavender. It remained the leading producer of organic rose[1] and lavender[2] essential oils in 2024. Bulgarian organic lavender is mainly used to produce essential oil. Bulgaria also produces organic rose and lavender floral waters, as well as organic lemon balm[3] essential oil.
The main areas of Bulgarian lavender production are Dobritch, Kazanlak, Varna and Stara Zagora[4]. Roses are primarily grown in the Kazanlak Valley. About 15% of the area cultivated with roses is certified organic and around twenty distilleries are involved in organic rose essential oil production.
Approximately 80% of organic rose-based products are exported. France remained the main destination for organic rose and lavender essential oils.

■ Poland produces a wide variety of organic aromatic plants (basil, parsley, oregano, rosemary, coriander, mint, lemon balm), mainly used for cooking.

■ In 2024, the area of Spanish fragrant, aromatic and medicinal plants grown organically declined by 25.1%, reaching 11,729 hectares. More than half of Spanish area of these plants was grown organically in 2024.

1- *Rosa damascena*
2- Worldwide
3- *Melissa officinalis*
4- Kazanlak and Stara Zagora are located in the central part of the country, while Dobritch and Varna are in the northwest.

Focus on organic animal production in the EU

Organic cow milk: Over 5.5 million tonnes produced in 2024

Production

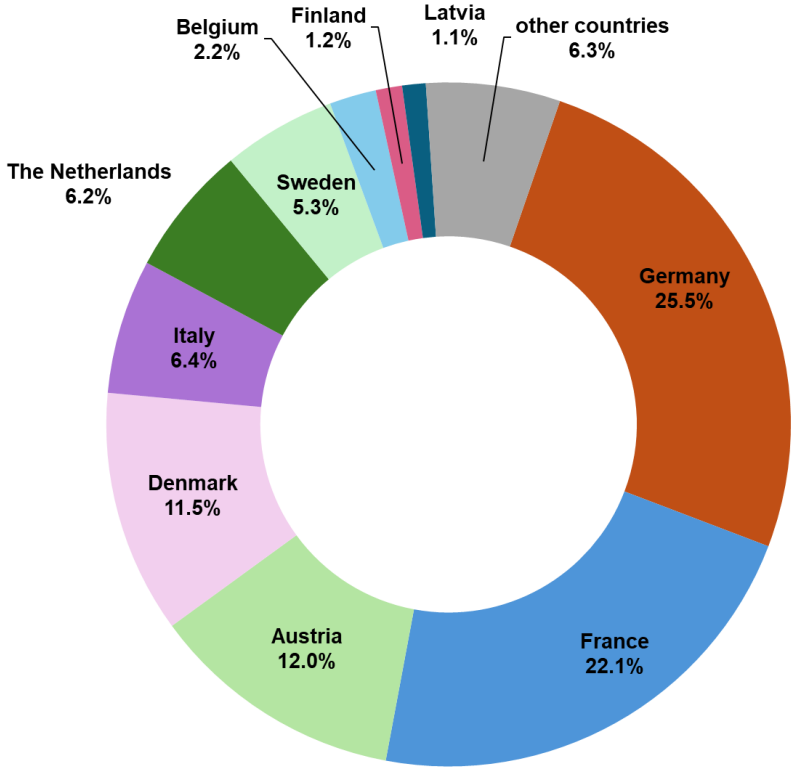
- Over 1 million dairy cows were certified organic in the EU in 2024 (–4.5% compared with 2023), representing 5.3% of the EU herd.

- EU Organic cow milk production was estimated at over 5.5 million tonnes in 2024, representing 3.4% of total cow milk production. Organic production declined by 4.2% compared with 2023 but has grown by 61% over the last decade. EU organic milk production peaked in 2022, exceeding 5.9 million tonnes.

- The period 2020–2024 was marked by climatic and health-related challenges (heatwaves, droughts and outbreaks of bluetongue in certain regions), which sometimes impacted overall milk production and organic dairy herds in some Member States.

- In 2024, Germany, France[1], Denmark and Austria together accounted for 71% of the EU organic cow milk production.

Distribution of EU Organic Milk Production in 2024



Note: This refers to milk collection in Germany, France, Denmark and Austria.
Source: Agence BIO based on various European sources

1- Germany and France are also the two leading milk producers in the European Union.

- The evolution of organic cow milk production has varied across countries: between 2014 and 2024, it doubled in Germany, more than doubled in France, increased by 32.4% in Denmark[1] and by 41.4% in Austria.

- German organic milk collection increased by 1.9% in 2024, exceeding 1.4 million tonnes, i.e., over 4% of the national milk collection. In 2024, Bavaria accounted for nearly half of German organic milk collection, with 8.9% of the state's organic cow milk collection.
Two main factors have driven the growth of organic milk collection in Germany in recent years: rising prices of organic milk paid to farmers since 2021[2], increasing faster than in France and a growing domestic demand for organic dairy products that exceeds the German production capacity.

- French organic milk collection declined by 4% in 2024, reaching 1.2 million tonnes, or about 5% of the national milk collection. Pays de la Loire and Brittany are the main regions for organic milk collection, accounting for 46% in 2024.
The decline in French organic cow milk collection in 2024 was due to a 3% reduction in the herd of organic dairy cows. This was driven by a slowdown in domestic consumption of organic dairy products in recent years and by a relatively small price gap between organic and conventional milk for producers.

- In Austria, organic milk collection remained largely stable in 2024, totalling nearly 0.7 million tonnes (–0.7% compared with 2023). The country continued to lead the EU in terms of organic share in milk production, at 18.1%. The main regions for organic milk production are located in the Alpine areas of Salzburg, Tyrol and Vorarlberg.

- In Denmark, organic milk production fell by 8.1% in 2024, reaching nearly 0.64 million tonnes. Preliminary estimates suggest a further decline of around 8% in 2025. In 2024, less than 9% of Danish milk production was organic.
Jutland remained the main region for organic milk production in Denmark.
The Danish organic dairy sector benefited from research support starting in the 1990s, which played a key role in the initial growth of the sector, particularly by establishing economic benchmarks that demonstrated the profitability of organic dairy farms to banks.
In the early 2020s, as Arla, the largest dairy, faced a surplus of organic milk, it asked its suppliers in Denmark and Sweden to reduce their organic milk production.

Organic milk collectors and processors

- In Germany, of the roughly forty dairies engaged in organic production, thirteen are fully organic. Five dairies handle a large share of organic milk collection and most processing facilities for organic milk are located in Bavaria.

- In France, there were around one hundred organic cow milk collectors in 2024.

1- In the early 2010s, dairies stopped accepting new organic delivery drivers.

2- In Germany, the average price of organic milk paid to farmers was €580 per 1,000 litres in 2024, 20% higher than the price of conventional milk.

- In Denmark, Arla Foods dominates the dairy industry, including the collection and processing of organic milk. The other two major organic dairies are Thise Dairy and Naturmælk.

- All 85 Austrian dairies are involved in organic production[1], with most operating as cooperatives.

- Bottled milk is the main organic dairy product produced in most countries. The European Commission estimated that about a quarter of raw organic milk processed in the EU is used for bottled milk.
Austria stands out for the large share of its organic milk devoted to cheese and butter production, accounting for roughly half.
Several milk collectors have also invested in drying facilities for the production of milk powder and whey powder.

Market

- The EU organic dairy market is estimated at around €10 billion in 2024. Consumption of organic dairy products is mainly concentrated in the major producing countries: Germany, France and Denmark.

- Organic share in dairy purchases by value is generally significant, reaching 14.0% in Austria in 2022, 4.4% in Belgium in 2024 and 5.3% in the Netherlands in 2022.

- Regarding bottled milk, which is often the main organic dairy product consumed, the value market share was even higher, with:

  - Denmark: 38.0 % in large retail in 2024,
  - Austria: 29.1 % in large retail in 2024,
  - Germany: 15.6 % in 2022,
  - Sweden: exceeding 10% for several years,
  - Italy: 10% for fresh milk in 2020.

- In Germany, domestic demand for dairy products remains strong. The market for organic dairy products has exceeded €1.1 billion for several years.
From 2023 onwards, Aldi and Lidl intensified their organic cheeses ranges, mainly under private labels. This has made these products accessible to a wider range of consumers. They continued to expand their ranges in 2024 and 2025.
In 2024, all organic dairy products sales increased in value compared with 2023: +0.8% for organic milk, +8.1% for yogurts, +3.5%[2] for cheeses and +1.1% for butter.
In 2025, organic dairy sales grew very dynamically, with volumes increasing by 6.7% for milk, 13.4% for yogurts and 5.0% for cheeses, with the exception of butter[3], whose sales declined by 5.8% in volume.
In 2025, organic products accounted for 14.5% of milk sales by volume, 10.5% of yogurt sales, 4.6% of cheese sales and 3.8% of butter sales.

1- The latter began its organic business in 2016.

2- Organic cheeses sales had increased by 13.3% in value in 2023 compared to 2022.

3- Very high price of organic butter in Germany in 2025

In 2025, private labels accounted for around 70% of the turnover of organic dairy products sold in large-scale retail.

- The French market for organic dairy products declined by 3% in 2024 compared with 2023, exceeding €1.1 billion, or 10% of the French organic market. Milk remained the main organic dairy product consumed in France, accounting for nearly a third of this market in 2024.
France exports organic cheeses (Comté and other cooked pressed cheeses, as well as uncooked pressed cheeses) to neighbouring countries, especially Belgium and Germany. France also exports organic dairy products to third countries, including cheeses—mainly to the United Kingdom—and milk powders, primarily to countries in the Middle East.
Organic dairy products imported by France are mainly Mediterranean and British cheeses.

- In Denmark, the organic dairy market has long been well established. Sales of organic dairy products in Danish large retail reached €472 million in 2024, an increase of 2.0% compared with 2023. This represented 22.1% of organic sales in mass distribution in 2024.

- The Italian organic dairy market nearly reached €900 million in 2024. Yogurts and fresh milk are the best-selling organic dairy products in Italy.

- In Austria, demand for organic dairy products increased in 2024. The main organic dairy products purchased by Austrian consumers are milk, yogurt and cheese.

- In the Netherlands, organic dairy sales in mass distribution amounted to €421 million in 2021. Cheese is the leading category of organic dairy products sold, just ahead of milk

- In Sweden, organic dairy sales have been declining for several consecutive years (-6.7% in value in 2024 and -5% in 2023). This is linked to a drop in demand for organic dairy products and a decrease in organic milk production in Sweden. A number of Swedish consumers have turned to milk alternatives.
The most consumed organic dairy products in Sweden are milk, followed by yogurt and fermented milk and then organic cheeses, to a lesser extent.

- In Belgium, the main organic dairy products sold are milk, yogurts and cheeses.

- In Finland, organic dairy sales declined in 2024 compared to 2023. As in Sweden, the rise of plant-based alternatives has negatively impacted demand for dairy products.
In 2024, milk remained the most consumed organic dairy product in Finland, ahead of yogurt and fermented milk.

- In Ireland, the organic dairy market was valued at €41 million in 2022 (+8% vs 2021) and accounted for around 3.3% of the Irish dairy market.

Milk and yogurt are the main organic dairy products consumed in Ireland.

Trade in organic dairy products

- A significant share of organic milk and dairy products is traded within the EU, as well as exported to third countries. According to Institut de l'Elevage, trade in organic milk is likely to intensify in the coming years.

- Denmark and Austria are the EU countries that export the most organic dairy products.

- In Denmark, the Arla Foods group is the main organic dairy exporter. Thise also engages in exports. Butter is the principal organic dairy product exported from Denmark. In 2024, dairy products accounted for nearly 27% of the value of Danish organic exports. Denmark exports its organic dairy products to Europe (especially Germany, Sweden and the Netherlands) and to Asia (particularly China).

- In 2024, Austria exported about 30% of its organic milk to Germany. Austria also exports some organic dairy products to other European countries and to China (milk powder).

- In 2024, Germany remained the main destination for European organic dairy products. It imports some organic dairy products in large quantities while exporting others (particularly milk powder to Asia). Its organic dairy imports have recently been estimated at just over a quarter of its consumption. The main sources are Austria and Denmark. Most imports are in the form of raw milk and bottled milk. Germany also imports organic cheeses, notably from Austria, Italy and Switzerland.

- Sweden imports Danish organic dairy products. It imported over €7 million worth of organic dairy products and eggs from Denmark in 2024.

- Italy imports between 30,000 and 40,000 tonnes of fresh organic milk per year, mainly from Austria and Slovenia.

Organic goats: Greece in the lead for livestock

Production

Total goats

- Over 1.4 million goats[1] were certified organic in the European Union in 2024 (-1.2% vs 2023). This represented 14.1% of the EU goat herd.

- In 2024, the share of the goat herd certified organic was nearly 50% in Austria, 12.4% in France, 11.5% in Italy and 4.0% in Spain.

1- Few countries publish data on certified organic dairy goats.

Dairy goats

In 2024, organic goat milk production in the European Union reached around 103,000 tonnes.

The Netherlands ranked first, accounting for 30% of the EU organic goat milk production, followed by France (23.2%), Greece (18.0%), Spain (14.0%) and Italy (8.2%).

In the Netherlands, organic goat milk collection fell by 9.7% in 2024, totalling 30,933 tonnes. Friesland remained the main region for organic goat milk production. In this country, goat farms are generally larger than in other EU member states, with each farm typically housing several hundred goats. The processing of organic goat milk is quite diverse: ingredients (e.g., milk powder), butter, cream, yogurt and fermented milk and some cheese. A part of the organic dairy products, especially powders and specialised ingredients, is exported to other EU countries and third countries.

In France, organic goat milk collection declined by 16.1% in 2024 compared to 2023, totalling 23,874 tonnes, or 4.6% of the national goat milk collection.
In 2024, the regions with the largest organic dairy sheep herds remained Auvergne-Rhône-Alpes, Occitanie and Pays de la Loire.
France produced 1,319 tonnes of organic goat cheese in 2024 and nearly 2,400 tonnes of yogurt and fermented products made from organic goat milk.

In 2023, Greek organic goat milk collection reached 18,500 tonnes, i.e., about 11% of the national goat milk collection. In Greece, organic goat milk is produced in several regions, including mountainous areas.
Most Greek organic goat milk is processed into cheese (notably feta, myzithra, kefalotyri, etc.) rather than bottled milk.

Spanish organic goat milk production reached 14,375 tonnes in 2024, up 5.7% compared to 2023. Andalusia[1] remained the main production region in 2024 (two-thirds of the volumes), followed by Castilla-La Mancha (20%). Collection and processing systems are more developed in these two autonomous communities than in the rest of the country. Organic goat milk is mainly processed into cheese.

In Italy, organic goat milk collection increased by 9.9% in 2024 compared to 2023, reaching 8,397 tonnes. The main Italian regions for this production are the mountainous areas of central Italy, the South and Sardinia. In Italy, most processing is done on the farm and the majority of the organic milk is used to produce yogurt.

Market

In Germany, there is a stable commercial supply of organic goat milk products available in mass distribution, organic shops and online.

1- In 2024, Andalusia also remained the leading region for organic goat meat production, with 316 tonnes produced, ahead of Castilla-La Mancha, which produced 201 tonnes.

- France appears to be the most developed EU market for organic goat milk products. Nevertheless, household purchases of organic goat cheese (excluding fresh cheese) declined by 10.4% in 2024 compared to 2023.

- In Italy, domestic production of organic goat milk products is insufficient to meet demand. As a result, the country imports organic goat milk from Austria and organic goat milk products from both Austria and France.

- In the Netherlands, consumption of organic goat milk products remains fairly modest.

Organic sheep milk: mainly produced in Greece

- Nearly 259,000 tonnes of organic sheep milk were produced in the EU in 2024, a decrease of 1.1% compared to 2023. Almost two-thirds of the production was located in Greece, 18% in Italy and 13% in France.

- In 2022, Greece produced 170,346 tonnes of organic sheep milk, representing about 23% of its total sheep milk production. Organic sheep milk is mainly processed into feta and other traditional Greek cheeses.

- In France, organic sheep milk collection amounted to 33,392 tonnes, a decrease of 1.1% compared to 2023. In 2024, organic milk accounted for 11.1% of the national sheep milk collection. France produced 4,850 tonnes of organic sheep cheese in 2024 and over 8,000 tonnes of yogurt and fermented products made from organic sheep milk.
In 2024, Occitanie remained by far the main region for organic sheep milk collection. A cooperative dedicated to organic sheep milk, Aveyron Brebis Bio, was established in this region in 2020.

- In France, household purchases of organic sheep cheese (excluding fresh cheese) fell by 14.6% in volume in 2024 compared to 2023.

Market for organic baby products: popular products in many countries

- The European Union remains one of the world's largest markets for organic infant formula and is among the main producers of these products.

- Infant formulas contain a significant proportion of whey proteins[1]. Global demand for these proteins remains high, which can create supply pressures and influence costs.

- The EU organic infant food market is experiencing sustained growth. Infant milk formula remains the dominant segment within the organic sector and many

1- Whey protein mainly comes from whey generated during cheese production, as direct extraction from milk is costly. The markets for organic proteins, such as organic whey or organic casein, remain limited and more expensive than their conventional counterparts.

companies are now expanding their organic product ranges to meet this growing demand, which is often increasing faster than the conventional infant food market.

- Germany remains the leading EU market for organic baby food. Nearly two-thirds of German households with infants report regularly purchasing organic baby food. The organic share of infant food purchases already exceeded 40% in value in 2019.

- In Denmark, sales of organic baby food in large retail were close to €15 million in 2024, representing a 2.8% decrease compared with 2023.

- In 2024, organic products accounted for one quarter of baby food purchases in Finland and 20.5% in Sweden.

- In France, organic products accounted for 13.9% of infant milk purchases by value in 2024.

Organic beef, lamb and pork: Still a very modest share of certified organic pig livestock

Organic cattle

- Nearly 5.1 million cattle (dairy and beef) were certified organic in the European Union in 2024, representing a 6.5% decrease compared with 2023. 7.1% of the EU cattle herd was certified organic in 2024.

- France, Germany and Italy accounted for nearly 46% of the EU organic cattle herd in 2024.

- In 2024, a few countries stood out for the share of their cattle herd certified organic: Greece (33.6%), Lithuania (30.8%), Latvia (27.2%) and Austria (22.4%). The share was significantly lower in countries with a large number of organic cattle: 5.9%[1] in France, 7.8% in Germany, 5.0% in Spain and 9.1% in Italy in 2024.

- In France, organic cattle farming is mainly concentrated in Nouvelle-Aquitaine, Occitanie and Pays de la Loire.

- In 2024, nearly 257,000 tonnes of organic beef were produced in the European Union. Germany was the largest EU producer of organic beef with 27.5%, followed by Italy (25.3%), Spain (14.3%) and France (9.4%).

- Irish organic beef production is expected to increase significantly by 2030.

1- Organic share applies only to suckler cows in the case of France.

Organic sheep

- Over 6.3 million sheep were certified organic in the EU in 2023, representing 11.1% of the sheep flock. Their number remained almost stable compared with 2022.

- Greece remained the country with the largest number of organic sheep in 2024, accounting for 44% of the EU flock, ahead of France (14%) and Spain (11%).

- In 2024, a few countries had a particularly high share of their sheep flock certified organic: Estonia (41.6%), Czech Republic (38.3%), Austria (26.0%), Finland (22.7%) and Sweden (25%). In Greece, it was 31.2% in 2022 and in Spain, 5.4% in 2024.

- In France, organic sheep farming for meat is mainly carried out in Occitanie, Provence-Alpes-Côte d'Azur and Nouvelle-Aquitaine.

- In 2024, EU organic sheep meat production was around 20,000 tonnes. Spain ranked first with 53.2% of EU production, followed by Italy (16.4%) and Greece (11.1%).

- In 2024, Andalusia accounted for 61.8% of Spanish organic sheep flock and 71.4% of organic sheep meat production.

- The organic lamb PGI was launched in Sardinia.

Organic pigs

- Nearly 1.3 million pigs were certified organic in the EU in 2023 (–13.5% compared with 2022), representing only 1.0% of the EU pig herd.

- The main organic pig-producing countries are Denmark, France and Germany. They accounted for nearly 71% of the EU organic pig herd in 2024.

- Organic share of pig herds remained low in many countries. In 2024, it was 3.1% in Denmark, 1.8%[1] in France and 1.1% in Germany.

- In France, organic pig farming is mainly concentrated in Nouvelle-Aquitaine and Brittany.

- In 2024, the European Union produced 94 thousand tonnes of organic pig meat. Germany[2] accounted for 42% of EU production, followed by France (18.3%) and Denmark (11.5%).

Organic meat market in the European Union

- Germany and France are the leading EU markets for organic meat.

1- In France, the figure refers to sows, while it is 0.9% for finishing pigs.

2- In 2025, German organic pork production grew by 6% in volume.

- The organic market share of meat and meat products has remained relatively low in most EU markets in recent years. However, a few countries stood out, in value:
  - Denmark: 10.6% in mass distribution for minced beef in 2024,
  - Austria: 9.5% in mass distribution for beef in 2024[1],
  - Belgium: 8.2% for meat in 2024,
  - Sweden: 6.5% for beef in 2024,
  - Germany: 4.5% for meat in 2025.

- In 2024, organic red meat sales in Germany increased by 4.6% in value compared to 2023. Sales of organic meat products and sausages rose by 5.8% in 2024.
In 2025, organic meat sales fell by 7.4% in volume compared to 2024, while sales of meat products declined by 0.7% in volume. Sales of organic pork and beef decreased due to limited supply and high prices for organic beef[2].
Germany notably imports organic pork from Denmark.

- The French market for organic beef reached €348 million in 2024 (-5.2% vs 2023), organic pork €95 million (-15.2%), organic lamb €59 million (-1.7%) and organic cured[3] and processed meat products €118 million (-7.8%).
Upstream, the organic beef sector faced supply difficulties in 2024, as many animals were directed to the non-organic market. Downstream, the very high price of organic minced beef (47% above the price of conventional minced beef) explains the sales decline.
The organic lamb market has been disrupted for several years by the overall situation in the sheep-meat sector. Indeed, the national price of conventional carcasses increased by 50% between Easter 2021 and Easter 2024. As a result, the organic sector, with less secure outlets, was unable to offer better returns and organic slaughter numbers fell.
The decline in organic pork sales continued across all channels except direct sales. Organic pork remains significantly more expensive than conventional pork. This gap is naturally amplified during further processing and organic ham is sold at almost twice the price of non-organic ham.
In France, there was a modest flow of organic pig imports in 2024.
Some young cattle from the organic suckler herd are still exported to Italy, but without organic certification.

- Danish organic beef sales in mass distribution increased by 1.8% in 2024, reaching €40 million. Organic pork sales rose by 5.3%, approaching €21 million.

- 2024, demand for organic meat increased in Austria.

- Belgium imports a significant share of its organic pork consumption.

1- However, in 2024, the share was less than 3% for pork.

2- The price of organic beef rose by 12.8% in 2025 compared with 2024.

3- Lardons and cooked ham are the two top-selling organic pork products.

Organic broilers: France leading

Production

- In 2024, the European Union had over 25 million organic broiler chickens.

- France ranked first in EU, with over 10.7 million birds in 2024, representing nearly 43% of the EU organic broiler chickens. However, the French certified organic broiler flock declined by 13% in 2024. The organic share remained low in France in 2024, at 1.6%. Organic broiler chickens are mainly raised in Pays de la Loire and Nouvelle-Aquitaine.

- In 2024, other countries with large herds of certified organic broiler chickens included Belgium, Italy and Germany.

- Austria stood out, with 31% of its broiler chicken population certified organic in 2024.

- Production of other types of organic poultry is also developing, particularly in Austria, where 61% of ducks and 12% of turkeys were already certified organic in 2024.

Market

- The main UE markets for organic chicken meat are France, Germany and Italy.

- In 2024, the organic market share of poultry remained modest in most EU countries. However, it reached 8.0% in value in Belgium.

- The French organic poultry market[1] was valued at €238 million in 2024, a decline of 3.6% compared to 2023. This decrease is linked to the continued drop in production in 2024.

- In 2024, German organic poultry sales declined by 4.7% in value compared to 2023. Nevertheless, 12.6% of German households purchased organic poultry at least once in 2024.
In 2025, organic poultry sales increased again, rising 16.7% in volume, but could have been higher if not for the avian influenza outbreak, which caused shortages.

- In Italy, poultry accounts for approximately three-quarters of the organic meat market.

- Danish organic chicken sales in large retail increased by 9.3% in 2024, approaching €15 million.

1- Mainly chicken, with sales of other organic poultry remaining marginal.

Eggs: over 7.1 billion organic eggs laid in the EU in 2024

Production

- In 2024, over 29.1 million laying UE hens were certified organic (+2.0% vs 2023), representing 7.4% of the EU laying hen flock.
Over 7.1 billion organic eggs were produced in the EU in 2024, accounting for approximately 6.4% of total egg production.

- France[1] remained the leading EU producer of organic eggs, with nearly 2.2 billion organic eggs produced in 2024. Its flock numbered around 7.9 million certified organic laying hens in 2024 (-4.3% compared to 2022), representing 27% of the EU organic flock. In 2024, 14.1% of French laying hens were certified organic.
Brittany is the top French region for organic laying hen production, followed by Pays de la Loire.

- In 2024, Germany was the second-largest producer of organic eggs in the European Union, with 2.1 billion organic eggs produced, representing 14.1% of the German egg production[2]. Its organic egg production increased by 5.0% in 2024 compared to 2023. The certified organic laying hen flock exceeded 7.9 million in 2024 (+5.7% vs 2023), accounting for 27% of the EU organic flock.
In 2024, more than two-thirds of German organic eggs were produced in three states: Lower Saxony, Bavaria and Mecklenburg-Western Pomerania.

- In 2024, the Netherlands produced nearly 0.9 billion organic eggs and Italy produced 0.6 billion.

Market

- The value market share of organic eggs is often quite substantial, particularly in:
  - Denmark: 41.2% in large retail in 2024,
  - Germany: 22.9% in 2022,
  - Belgium: 20.4% in 2024,
  - The Netherlands: 18.9% in 2022,
  - Austria: 18.5% in mass distribution in 2024,
  - Sweden: 15.2% in 2024
  - Finland: 13.0% in 2024.

- Eggs rank among the most purchased organic product categories by EU consumers.

- In France, the organic egg market was valued at €664 million in 2024 (+2.3% vs 2023), representing 5% of the French organic market. In 2025 and early 2026, the French market experienced an egg shortage due to avian influenza.

1- France remained the largest egg producer in the EU in 2024 (across all production systems), followed by Spain and Germany (tied), and then Italy.

2- Compared with 13.3% in 2023.

- In Germany, organic egg sales fell by 1.2% in volume in 2024 compared to 2023. In 2024, demand for organic eggs remained higher than production.
In 2025, organic egg sales increased by 3.0% in volume compared to 2024. The organic market share in egg sales by volume reached 13.8% in 2025 and the price of organic eggs rose by 5.5% compared to 2024.

- In Denmark, organic egg sales in supermarkets increased by 4.3% in 2024, approaching €106 million.

- In Italy, organic egg sales increased by 9.7% in value in 2023, reaching €167 million.

- In the Netherlands, organic eggs accounted for 17.4% of the value of organic product sales in supermarkets in 2024.

Organic honey: Bulgaria leading

Production

- In 2024, the number of EU organic beehives likely still exceeded one million. However, recent data are lacking for many countries, making it impossible to provide a more precise estimate.

- In 2024, Bulgaria had 238,178 organic beehives, an increase of 1.8% compared to 2023. About one-third of Bulgarian beehives were certified organic in 2024.
That year, Bulgaria produced 2,950 tonnes of organic honey. The country exports most of its organic honey production, especially to Germany.

- In Italy, 261,609 certified organic beehives were recorded in 2024, a figure stable compared to 2023. In 2024, 13.9% of Italian beehives were certified organic.
Italy exports a significant share of its organic honey production.

- In 2023, Romania had over 170,000 certified organic beehives. In 2024, the country produced nearly 6,379 tonnes of organic honey.
Like Bulgaria, Romanian organic honey production is mainly aimed at export markets. The main destinations for Romanian organic honey are Germany and the Nordic countries.

- In France, the number of certified organic beehives increased by 7.3% in 2024, reaching 242,090, i.e., 22.2% of French beehives. The majority of organic hives are located in southern France, particularly in Auvergne-Rhône-Alpes and Occitanie.
In 2024, France produced 2,611 tonnes of organic honey (12.1% of national honey production[1]), a decrease of 42% compared to 2022. The hives number wintering

1- Compared with 15% in 2023.

increased slightly, as did the number of hives in production, but yields were very low[1]: 14.6 kg per hive, compared to 24 kg per hive in 2023.

Market

- The EU is the world's largest market for organic honey.

- EU retailers do not limit themselves to selling jars of honey; they increasingly offer products in which honey is used as an ingredient.

- Germany[2] is an important market for organic honey. It imports part of its organic honey, notably from Bulgaria, Romania and third countries.

- In 2023, organic honey sales in France amounted to €85 million, representing 12.6% of the honey consumed in the country. This corresponded to nearly 6,080 tonnes, more than double French organic honey production. Nevertheless, direct sales remained the second-largest marketing channel for organic honey (after mass distribution[3]), accounting for nearly 30% of sales by value in France.

- In 2024, the EU imported over 14,000 tonnes of organic honey, an increase of 11% compared to 2023. In 2024, China remained the main source of organic honey imported into the European Union, followed by Brazil, Mexico and Ukraine.

Organic aquaculture: mussels and salmon are the main products

Production

- EU legislation on organic aquaculture came into force in July 2010. Before that, there were only a few national regulations and production under private standards.

- In 2024, the European Union had around 650 organic aquaculture producers who produced nearly 76,000 tonnes of organic aquaculture products, a decline of 11% compared to 2023.

- The five largest EU organic aquaculture producers are Ireland (21% of EU production in 2024), the Netherlands (18.7%), Germany (14.5%), Italy[4] (13.5%) and Denmark (10.8%).

- The organic share in aquaculture is high in some countries, such as Ireland (over 50% and even over 95% for salmon), Germany (around 21%), Poland (20%) and Denmark (nearly 13%). However, in many member states, organic accounts for less than 1% of aquaculture production, notably Portugal, Cyprus and Croatia.

1- Similar to conventional production.

2- Germany continued to be the leading European honey market, with approximately 78,600 tonnes consumed in 2022, and also has the highest number of beekeepers in Europe.

3- In 2024, large retail represented 47% of organic honey sales by value.

4- Mainly in Veneto and Emilia-Romagna.

- In 2024, the main aquaculture species produced organically in the European Union were:

  - Mussels: Nearly 58,000 tonnes of organic mussels were produced in the European Union in 2024. The main producing countries were Ireland (36.6% of volumes), the Netherlands (35.2%), Italy (26.8%) and Denmark (19%). A significant share of Irish production is exported. Denmark also exports a large portion of its organic mussel production, mainly to Germany, France and Sweden.

  - Salmon: the main fish species produced organically. Ireland is the leading producer of organic salmon, having started production in 1995. In 2024, almost all farmed salmon in Ireland was organic, totaling 13,877 tonnes. Most of Irish organic salmon production is exported. The main markets for Irish organic salmon are France, Poland, Germany, Belgium and the United Kingdom. In 2025, Ireland exported over €100 million worth of organic salmon.
    Italy also produces a small amount of organic salmon (20 tonnes in 2023). Other EU countries likely produce some as well, but in extremely limited quantities.

  - Trout (rainbow trout and sea trout): the second-largest organic fish production in the EU. In 2024, EU countries produced around 3,000 tonnes of organic trout. France and Greece are the largest producers.

- The European Union also produces other organic fishes, including cyprinids, sea bass, gilthead bream[1] and sturgeon, as well as organic shrimp (in Italy), oysters (in France and Spain) and aquatic plants (mainly in Spain).

Market

- In 2023, EU consumption of organic aquaculture products was estimated at 100,000 tonnes, representing around 3% of total aquaculture product consumption.

- The main EU markets for organic aquaculture products are:

  - Germany: Germans consume large quantities of organic salmon, particularly Irish, as well as organic trout,
  - France: In 2024, sales of organic aquaculture products fell by 14% in value, reaching €143 million. This decrease affected most segments, notably organic smoked salmon and organic shrimp,
  - Italy: Demand for organic aquaculture products is high. particularly for mussels and fish.

- The European Union imports organic aquaculture products from third countries, notably:

  - Salmon from Norway and the United Kingdom,
  - Shrimps, mainly from Ecuador, Madagascar, Indonesia, Honduras and Vietnam,
  - Mussels from the United Kingdom and Chile. However, the mussels consumed in the EU are mostly domestically produced.

1- Organic sea bass and gilthead bream are primarily produced in Greece and Croatia.

Willingness to develop the organic sector and public policies[1]

■ The European Union was a pioneer in terms of public support for organic agriculture. Between 1987 and 1993, many Member States introduced subsidies for conversion and in some cases for maintenance, on a national or regional basis.

■ The Common Agricultural Policy remains one of the main instruments providing financial support for the development of the organic sector. Nevertheless, there are other types of public support aimed in particular at research, the structuring of supply chains, collective catering and household consumption.

The Green Deal and the Farm to Fork Strategy

■ The Green Deal, adopted in 2020, includes a set of legislative measures, policy actions and funding mechanisms covering the following areas: sustainable energy, circular economy, clean transport, nature and biodiversity, food and agriculture, as well as green finance and industry. Through the Green Deal, the European Union has committed to becoming the first carbon-neutral continent by 2050.

■ The Farm to Fork Strategy was adopted in May 2020. It aims, by 2030, to reduce synthetic pesticides and the associated risks by 50%, chemical fertilisers by 20%, nutrient losses (nitrogen and phosphorus) by at least 50% and the use of antibiotics by 50%. Another goal is to reach 25% of EU agricultural land under organic farming by 2030[2]. It is also planned to dedicate 10% of land to high-diversity landscape features.

■ According to a European Environment Agency study , it is very unlikely that the EU will reach its target of 25% of its utilised agricultural area under organic farming by 2030. If the current growth rate continues, this would lead to a share of 15% under organic farming by 2030.

European Union organic action plan

■ The third Action Plan for Organic Farming[3] was adopted in March 2021[4]. It covers the period 2021–2027.
It aims to expand the area under organic cultivation and to support organic consumption. This plan follows the Farm to Fork Strategy and is consistent with the European Green Deal and the EU Biodiversity Strategy.

1- This chapter presents the main actions in support of organic farming in the European Union, without claiming to be exhaustive.

2- Vs 8.5 % late 2019

3- Available for download here: https://ec.europa.eu/info/sites/info/files/food-farming-fisheries/farming/documents/com2021_141_act_organic-action-plan_en.pdf

4- The second action plan covered the period 2014–2020.

- This EU organic farming plan includes 23 actions organised around three main pillars:

  - Stimulate organic demand while maintaining consumer trust,
  - Encourage the expansion of EU areas grown organically,
  - Strengthen the role of organic production in the fight against climate change and biodiversity loss.

Regarding the promotion of consumption, the plan proposes concrete actions aimed at stimulating demand, preserving consumer trust and encouraging citizens to turn more towards organic products. These actions include:

  - Informing and communicating about organic production,
  - Promoting organic consumption,
  - Encouraging greater use of organic products in public canteens through public procurement,
  - Increasing the distribution of organic products within the framework of the EU school scheme.

The actions also aim to prevent fraud, increase consumer trust and improve the traceability of organic products.

- The CAP remains an essential tool for supporting conversion. Other key levers include organising information events and networking to share best practices, certification for farmer groups, research and innovation, the use of blockchain and other technologies to improve traceability and increase market transparency, strengthening local and small-scale processing, supporting the organisation of the food chain and improving animal feed.

- To raise awareness of organic production, the European Commission has been organising a European Organic Day every year on September, the 23rd since 2021. The European Commission also encourages the development of organic tourism networks through biodistricts.

- Furthermore, to further improve the sustainability performance of organic farming, actions are planned to enhance animal welfare, ensure the availability of organic seeds and reduce the sector's carbon footprint as well as its use of plastics, water and energy.

- Besides, Member States have been encouraged to promote the development of organic aquaculture.

- The European Commission has decided to increase the share for organic of research and innovation budget devoted to agriculture, forestry and rural areas, allocating at least 30% of the budget to topics specific to the organic sector.

- The European Commission conducts an annual monitoring of progress with representatives of the European Parliament, Member States and stakeholders, based on semi-annual progress reports and a mid-term review.

- Late 2025, the European Commissioner for Agriculture announced that a new European organic action plan could be launched.

Common Agricultural Policy and national strategic plans

Common Agricultural Policy

- The Common Agricultural Policy[1] consists of two pillars:
  - The first pillar: this consists of direct payments to farmers, eco-schemes and market measures. The first pillar is entirely funded by the European Agricultural Guarantee Fund (EAGF), which means that all direct payments are covered by EU money.
  - The second pillar: it concerns the rural development policy. The second pillar is funded by the European Agricultural Fund for Rural Development (EAFRD) and co-financed by national budgets. This pillar funds agri-environmental and climate measures (AECMs), including organic farming.

- In the current CAP, Member States must allocate 25% of the first pillar budget to eco-schemes. In addition, 35% of the second pillar budget must be dedicated to environmental actions.

- The interventions of the 2023–2027 CAP aim to achieve three strategic goals:
  - Agricultural production development,
  - Environment protection,
  - Strengthening of the socio-economic fabric of rural areas.

- The total budget of the current CAP is €387 billion over five years.

- The CAP is considered an important tool for achieving the goals set by the Green Deal and the Farm to Fork Strategy.

- The current Common Agricultural Policy recognises the role played by organic farming in meeting consumer demand for more environmentally friendly agricultural practices.
It remains one of the main tools for financially supporting organic sector development.

- Within the framework of the CAP's second pillar, all Member States have implemented conversion subsidies[2] and almost all have put in place maintenance subsidies.
Denmark and Austria were the first, in the 1980s, to offer this type of support. Between 1987 and 1993, many EU countries introduced conversion subsidies and in some cases maintenance subsidies, on a national or regional basis. After organic farming was legally defined at the EU level in 1991, payments to organic farmers for conversion to organic farming or for maintenance became widespread in various rural development plans.
The EU framework sets neither a fixed amount nor a standard duration for conversion and maintenance support; these therefore vary according to the Member States[3].

1- Since 1962, the CAP has been the main mechanism for supporting farmers in the European Union.
2- Or equivalent. See the case of the Netherlands.
3- See tables with conversion and maintenance

- Organic farmers can also benefit from eco-schemes[1] and agri-environmental and climate measures.

- The 2023–2027 CAP is based on a new implementation model consisting of strategic planning described in national strategic plans (NSPs) established for five years. These are set out in Regulation (EU) No 2021/2115 of the European Parliament and of the Council of 2 December 2021, establishing rules governing support for strategic plans to be drawn up by Member States under the Common Agricultural Policy and financed by the European Agricultural Guarantee Fund (EAGF) and the European Agricultural Fund for Rural Development (EAFRD).
A total of 28 strategic plans has been developed (two in Belgium).

- The European Commission has encouraged Member States to set quantified targets for the share of UAA grown organically in their strategic plans, without being able to compel them to do so.

Organic overview of national strategic plans

- All strategic plans include funding in support of organic farming.

Targets set by member states for the share of UAA grown organically

- These are the targets set by Member States within the framework of a strategic plan or a programme specifically for organic farming[2].

- Fourteen countries[3] have set targets of 10% or more by 2027, including seven with targets of 20% or more (Austria, Czech Republic, Estonia, Finland, Italy, Latvia and Wallonia).

1- In France, the eco-scheme payment for organic farming was €96.17 per hectare in 2024.

2 -The author preferred to group all the targets in a single table, even if they were not all set within the same framework.

3- Or regions

Comparison between targets for the share of UAA grown organically and actual shares

	Share of UAA grown organically reached				UAA share target by		
	2022	2023	2024	2025	2025	2027	2030
Austria	27.7%	27.3%	27.2%			30%	35%
Belgium/Flanders	1.6%	1.6%	1.7%			5%	
Belgium/Wallonia	12.7%	12.5%	12.3%			20 %	30%
Bulgaria	2.2%	2.9%	3.9%			7%	
Croatia	8.6%	8.0%	8.8%			12 %	14 %
Cyprus	6.3%	7.7%	8.1%		7.5%		10 %
Czech Republic	16.2%	16.9%	17.2%			22%	25%
Denmark	11.7%	11.4%	11.1%				21 %
Estonia	23.4%	22.9%	22.5%			22.3%	25%
Finland	15.0%	13.7%	13.6%			20%	25%
France	10.5%	10.3%	10.2%			18%	21%
Germany	11.2%	11.4%	11.5%	11.7%		14%	30%
Greece	17.6%	21.7%					25%
Hungary	6.3%	6.4%	6.2%			10%	15%
Ireland	2.1%	4.0%	5.0%			7.5%	10%
Italy	18.9%	19.8%	20.2%			25%	
Latvia	16.0%	15.1%	15.6%			20%	25%
Lithuania	9.0%	8.5%	8.5%			13%	15%
Luxembourg	6.2%	6.3%	7.2%		20%		15%[1]
Malta	0.6%	0.6%	0.8%				5%
The Netherlands	4.4%	4.8%	5.4%				15%
Poland	3.9%	4.4%	4.8%			4.5%	7%
Portugal	19.1%	21.7%	20.3%			12%	19%
Romania	5.1%	5.1%	5.8%				6%
Slovakia	8.5%	13.7%	14.1%			14%	20%
Slovenia	10.7%	11.3%	11.7%			18%	
Spain	10.8%	12.3%	12.3%				20%
Sweden	19.9%	18.3%	16.5%				30%

Source: Agence BIO based on the CAP Strategic Plans, national organic action plans and the French Agricultural Orientation Law

- Among the countries with targets to increase their share of UAA grown organically by 2027 or 2030, six nevertheless experienced a decline in this share in 2024 and one in 2023.

- Four countries had already reached their 2025 or 2027 targets by 2024: Cyprus, Estonia, Poland and Slovakia.

- Most countries are still far from reaching their targets.

1- A new target was set in January 2026. The target for 2025 had been too ambitious.

Other NSP targets

- Some countries have set other types of goals.

- Flanders, in Belgium, appears to be the only one to have set other quantified targets for 2027:
  - reach 5% of the number of farms in organic,
  - reach 5% organic in the turnover of animal production.

- Estonia has set targets to increase the competitiveness of its organic farming and to develop organic processing[1]. Slovakia also aims to expand its organic processing.

- Several countries link organic farming to environmental goals such as the preservation of water, soil and biodiversity. This is especially the case for Austria, Croatia, the Czech Republic, Estonia, Greece, Lithuania and Malta.

- Greece aims to improve market access for organic producers by strengthening short supply chains, producer groups and cooperatives and by promoting the added value of Greek organic products on international markets.

- Slovenia aims to develop networking among organic producers.

1- In order to reduce the processing of organic raw products into conventional products.

CAP 2023–2027 budgets in each country

CAP budgets in each country and budgets allocated to conversion and maintenance support (in million €) over 5 years

Country	Total budget of the CAP	Budget for conversion and maintenance subsidies for organic farming
Austria	9 160	753
Belgium	2 800 including 1 500 for Wallonia and 1 300 for Flanders	160
Bulgaria	8 060	431
Croatia	3 842	158
Cyprus	455	22
Czech Republic	5 528	452
Denmark	4 900	254
Estonia	1 066	153
Finland	10 280	381
France	45 000	1 700
Germany	31 000	2 374
Greece	19 300	380
Hungary	8 400	431
Ireland	9 800	256
Italy	37 000	90
Latvia	2 747	255,3
Lithuania	4 281	370
Luxembourg	607	115
Malta	166	2.3
The Netherlands	4 484	
Poland	25 320	905
Portugal	12 100	910
Romania	17 965	412
Slovakia	3 300	180
Slovenia	1 214	91
Spain	32 550	955
Sweden	4 970	351

Source: Agence BIO based on the CAP Strategic Plans and various national documents

- In Ireland, the CAP organic budget has been increased fivefold for the 2023–2027 period compared to the previous one.

Conversion and maintenance subsidies

- In general, the lowest payments concern grasslands or arable crops, while permanent crops and horticulture generally receive higher levels of subsidies per hectare.

- Malta offers the highest conversion and maintenance subsidies.

- Seven countries have the same amounts of support for conversion and maintenance: Cyprus, Croatia, Finland, Latvia, Slovakia, Slovenia and Sweden.

- Eleven countries have increased the amount of conversion support for all crops for the 2023–2027 CAP compared to the previous CAP.

Conversion Subsidies

Country	Amounts	Number of years of support	Change compared to the previous CAP
Austria	235 €/ha since 2025, 205 after	5 years	Decrease until 2024, followed by a return to the previous CAP level
Belgium Flandres	Ranging from €390/ha for grasslands to €1,700/ha for horticulture and orchards	2 to 3 years	Strong increase
Belgium Wallonie	Ranging from €365/ha for grasslands to €1,110/ha for orchards	2 to 3 years	Slight increase overall, except for vegetables, which decrease
Bulgaria	€358/ha for grasslands, €693/ha for all crops	2 to 3 years	Increase for arable crops and vegetables; decrease for orchards, vineyards and olives
Croatia	Ranging from €157/ha for grasslands to €1,074/ha for orchards	3 to 5 years	Increase for orchards; decrease for all other crops
Cyprus	€410/ha for grasslands and arable crops; €1,200/ha for other crops	3 to 5 years	Decrease for grasslands; slight increase for arable crops; strong increase for other crops
Czech Republic	Ranging from €106/ha for grasslands to €900/ha for vineyards	3 to 5 years	Slight increase, except for viticulture (stable)
Denmark	€332–€419/ha for grasslands, arable crops and vegetables; €869–€965/ha for orchards	5 years	Increase for all crops
Estonia	Ranging from €146/ha for arable crops to €880/ha for vegetables	3 to 5 years	Stable for grasslands and orchards; increasing for arable crops and vegetables
Finland	€260/ha for arable crops to €650/ha for vegetables and orchards; expected average increase of 15% in 2026.	2 years	Increase
France	Ranging from €44/ha for grassland pastures to €900/ha for orchards	5 years	Increase for arable crops; stable for grasslands and orchards
Germany	Amounts vary across crops and Länder[1], ranging from €210 to €2,240 per hectare depending on the crop and region.	Varies across Länder	Increase
Greece	Ranging from €110/ha for grasslands to €300/ha for vegetables	5 years	Increase
Hungary	Ranging from €204/ha for grasslands to €1,762/ha for orchards	3 to 5 years	Strong increase
Ireland	Ranging from €320/ha for arable crops to €800/ha for vegetables and orchards	2 years	Strong increase
Italy	Amounts vary across crops and regions, ranging from €13 to €1,200/ha depending on the crop and region	5 years	Stable overall

1- Lower Saxony is the federal state where the amounts for conversion and maintenance subsidies are the highest.

Latvia	Ranging from €97/ha for arable crops to €518/ha for vegetables and orchards	2 years	Decrease for arable crops; increase for other crops
Lithuania	Amounts vary across crops, ranging from €59/ha for seeds to €535/ha for aromatic and medicinal plants	5 years maximum	Increase for most crops
Luxembourg	Ranging from €400/ha for grasslands to €2,500/ha for orchards and vineyards	3 to 5 years	Strong increase
Malta[1]	4 378 €/ha	2 years	Strong increase
Poland	Ranging from €229/ha for grasslands to €681/ha for orchards	5 years	Increase
Portugal	Ranging from €98/ha for arable crops to €975/ha for orchards	5 years	Slight increase overall; decrease for grasslands"
Romania	Ranging from €143/ha for grasslands to €620/ha for orchards	3 to 5 years	Stable
Slovakia	Ranging from €96/ha for grasslands to €904/ha for orchards	3 to 5 years	Strong increase
Slovenia	Ranging from €159/ha for grasslands to €1,021/ha for vegetables	5 years	Increase for arable crops and vegetables; decrease for other crops
Spain	Amounts vary across autonomous communities and by farm size, ranging from €50 to €1,530/ha depending on the crop and region	2–5 years, depending on the region	Stable or increasing, depending on crop and region
Sweden	Ranging from €147/ha for arable crops to €737/ha for orchards	nd	Slight increase

Source: Agence BIO based on national documents and IFOAM Organics Europe

- France is the only country not to provide maintenance subsidies. In spring 2025, the French government confirmed the permanent removal of the maintenance subsidies[2].

- Eleven countries have increased the amount of maintenance subsidies for the 2023–2027 CAP compared to the previous one.

1- Conversion to organic farming represents a major challenge for Malta, as the land and is very small and fragmented.

2- Nevertheless, Ile-de-France launched a support scheme called Bio+ in 2025, aimed at farms that have completed their conversion. It will be paid to them for five years.

Maintenance subsidies

Country	Amounts	Number of years of support	Change compared to the previous CAP
Austria	€235/ha from 2025[1] onwards, €205/ha before	5 years	Decrease until 2024, followed by a return to the previous CAP level
Belgium/Flanders	118 €/ha	2 to 3 years	Decrease
Belgium/Wallonia	Ranging from €215/ha for grasslands to €960/ha for orchards	5 years	Light increase for most crops, sharp decrease for vegetables
Bulgaria	€358/ha for grasslands and €557/ha for all other crops	5 years	Increase for grasslands, arable crops and vegetables; stable for other crops
Croatia	Ranging from €157/ha for grasslands to €1,074/ha for orchards (same as conversion payments)	3 to 5 years	Decrease for grasslands and arable crops; stable for vegetables; increase for other crops
Cyprus	€410/ha for grasslands and arable crops; €1,200/ha for other crops (same as conversion payments)	3 to 5 years	Decrease for grasslands; slight increase for arable crops; strong increase for other crops
Czech Republic	Ranging from €100/ha for grasslands to €850/ha for orchards	3 to 5 years	Increase
Denmark	From €117/ha to €204/ha for grasslands, arable crops and vegetables. From €654/ha to €741/ha for orchards	5 years	Similar or slight increase depending on the crops
Estonia	Ranging from €132/ha for arable crops to €800/ha for vegetables	3 to 5 years	Stable for grasslands and orchards; increasing for arable crops and vegetables
Finland	€260/ha for arable crops to €650/ha for vegetables and orchards (same as conversion); expected average increase of 15% in 2026.	3 years	Increase
Germany	Amounts vary across crops and Länder, ranging from €190 to €1,060 depending on the crop and region	Varies across Länder	Increase
Greece	Ranging from €90/ha for grasslands to €240/ha for vegetables	5 years	Increase
Hungary	Ranging from €204/ha for grasslands to €1,097/ha for vineyards	3 to 5 years	Strong increase
Ireland	Ranging from €270/ha for arable crops to €600/ha for vegetables and orchards	3 years	Strong increase
Italy	Amounts vary across crops and regions, ranging from €15 to €1,190/ha depending on the crop and region	5 years	Stable overall
Latvia	Ranging from €97/ha for arable crops to €518/ha for vegetables and orchards (same as conversion payments)	5 years	Decrease for arable crops; increase for other crops
Lithuania	Amounts vary across crops, ranging from €59/ha for seeds to €525/ha for perennial grasses	5 years	Increase for most crops[2]
Luxembourg	Ranging from €300/ha for grasslands and arable crops to €1,500/ha for orchards and vineyards	3 to 5 years	Strong increase
Malta	3 614 €/ha	5 years	Strong increase
Poland	Ranging from €234/ha for grasslands to €534/ha for vegetables	variable	Increase

1- Since January the 1st, 2025, new measures under the ÖPUKL environmental program have strengthened support for organic farming. The core of this program is biodiversity.

2- During the previous CAP, there was no differentiation between conversion and maintenance subsidies in Lithuania.

Portugal	Ranging from €89/ha for arable crops to €927/ha for orchards	5 years	Slight increase, except for grasslands (decrease)
Romania	Ranging from €129/ha for grasslands to €479/ha for vineyards	3 to 5 years	Stable
Slovakia	Ranging from €96/ha for grasslands to €904/ha for orchards (same as conversion payments)	3 to 5 years	Strong increase
Slovenia	Ranging from €159/ha for grasslands to €1,021/ha for vegetables (same as conversion payments)	5 years	Increase for all crops except orchards (decrease)
Spain	Amounts vary across autonomous communities and by farm size, ranging from €55 to €1,530/ha depending on the crop and	1 to 5 years	Similar or decreasing depending on the crops and regions
Sweden	Ranging from €147/ha for arable crops to €737/ha for orchards (same as conversion payments)	nd	Slight increase

Source: Agence BIO based on national documents and IFOAM Organics Europe

Special case of the Netherlands

- In the Netherlands, the support system for organic farms is different from that of other Member States.

- The ecological funding programme has a total budget of €964 million over five years. This budget is divided into three levels: Bronze, Silver and Gold. The premiums are added to the basic payment (approximately €180–200/ha). Bronze: €60/ha, Silver: €100/ha, Gold: €200/ha.
To receive one of these premiums, farmers must carry out ecological activities on their farms. These activities allow them to accumulate points. A certain number of points entitles them to the Bronze, Silver, or Gold premiums. Organic farmers and those in conversion automatically receive the Gold premium upon presenting their organic certification. The amount allocated each year to organic farming through this Gold premium is approximately €16 million (covering about 80,000 hectares of land under organic cultivation).
The ecological scheme is valid for five years and each farmer can benefit from it annually.

Examples of other supports and subsidies for organic farming in the NSPs

- In Croatia, the actions planned under the NSP include educating farmers on the benefits of organic farming and increasing the promotion of organic products. In addition, investment measures for primary production and processing allocate 10% of their budgets to organic farming.

- In Spain, a support scheme for organic beekeepers has been established in several autonomous communities.

- In Estonia, there is an animal welfare support for organic farms.

- In Portugal, a support scheme is dedicated to the restructuring and conversion of vineyards to organic farming.

- In the Czech Republic, there is support for the modernisation of organic equipment and another for the development of short supply chains and processing. Funds are also allocated to farmer training, particularly in organic farming.

- In Slovenia, there is support for organic or converting beekeepers. A specific subsidy has also been established for organic cattle farming.

Analysis of the current CAP and prospects

- The current CAP is not considered sufficiently supportive of environmental practices, particularly by organic organisations.

- In its September 2024 report[1], the European Court of Auditors noted that a gap has emerged between the green goals of the 2023–2027 CAP and their implementation in Member States strategic plans. The European Commission was criticised for not applying measurable criteria to assess the environmental ambition of the national strategic plans.

- IFOAM Organics Europe also considers that many Member States have lacked ambition in the development and support of organic farming in their NSPs and that Member State budgets are, in most cases, insufficient to encourage more farmers to convert to organic farming and to reward organic farmers for the public goods they provide.
It believes that some countries, including Austria[2], Flanders and France, have set targets for the share of UAA grown organically that are too low.
It considers it unlikely that the European Union will achieve its target of 25% of UAA grown organically by 2030.
It thinks it is necessary for Member States to ensure that organic farmers can access the eco-schemes defined under the first pillar, as well as the relevant agri-environmental and climate measures defined under the second pillar.

- At the beginning of 2025, INRAE and IDDRI published a qualitative assessment of the current CAP. They concluded that Member States have largely prioritised economic goals over environmental ones, so the climate and environmental ambition of their respective strategic plans is generally low.
One of their recommendations is to build a post-2027 CAP that is more ambitious environmentally and to strengthen its budgetary efficiency, notably by modifying the distribution of direct payments to better target the producers who need them most.

- According to the European Scientific Advisory Board on Climate Change, the current CAP is not fully aligned with the EU climate goals (supporting high-emission practices and lacking incentives and ambitious implementation of eco-schemes).

- According to a study by the European Consumer Organisation, conducted during the winter 2025 in eight EU countries[3], less than a quarter of EU consumers believe that CAP payments are distributed fairly. 60% of consumers suggest that the CAP should support only the production of healthy and sustainable food.

1-https://www.eca.europa.eu/ECAPublications/SR-2024-20/SR-2024-20_EN.pdf

2- 30%, whereas it was already 27.7% in 2022.

3- Austria, France, Germany, Italy, Poland, Portugal, Slovenia and Spain.

- The European Commission considers that substantial progress in the development of organic farmland was achieved until the unexpected invasion of Ukraine by Russia. The resulting sharp rise in food prices had a negative impact on organic demand and discouraged, at the farm level, conversion or maintenance of organic farming.

- The European Commission considers that the current CAP needs to become simpler and better targeted, striking the right balance between subsidies, investments and regulation, while ensuring farmers a fair income. This simplification package is expected to take effect in 2026.
It aims to reduce administrative burdens, facilitate inspections and crisis management and strengthen the sector competitiveness. Among the proposed measures, a major innovation concerns organic farming: organic farmers will be recognised as "green by definition"[1], a decision welcomed by IFOAM Organics Europe.
The European Commission proposes to decouple the CAP strategic plans from future developments in environmental legislation arising from the Green Deal.

- In 2026, an interim evaluation will review the 2023–2027 CAP's performance.

Next CAP: 2028–2034

- The next CAP is currently under development.

- The CAP is expected to be part of a larger fund, the European Fund for Sustainable Economic, Territorial, Rural and Maritime Prosperity and Security (EFR), which will also include the European Cohesion Fund, the European Social Fund, the Common Fisheries Policy, the EU School Programme and the Internal Security Fund.

- In the next CAP, the current two pillars (direct payments and rural development) will likely be merged into a single framework, leaving Member States to adapt support to local realities through national and regional partnership plans. The goal is to support the competitiveness, sustainability and resilience of farms, while promoting the entry of young farmers and the modernisation of farms.

- With €300 billion, the budget for this CAP would represent a 20% reduction compared to the 2023–2027 CAP. However, this amount could be supplemented by additional allocations for rural development, innovation, ecological transition and infrastructure, left under the control of Member States.

- Payments will be adjusted according to the size, type of farm and environmental ambitions. Sustainable practices, organic farming and ecosystem services will be promoted, while the simplification of rules should reduce the administrative burden.

- IFOAM Organics Europe welcomes organic farming's recognition as a key post-2027 CAP policy tool but warns that without a dedicated environmental budget, Member States may fail to implement it.
It calls for at least one third of the CAP budget to be earmarked in a binding way for the protection of ecosystem services, including organic farming, as also indicated by the Strategic Dialogue on the Future of Agriculture promoted by the President of the European Commission.

1- Organic farmers will be completely exempt from inspections for GAEC 1, 3, 5, and 6.

Main national and regional bodies promoting the development of the organic sector

The organisations are listed in alphabetical order rather than by order of importance. The organisations responsible for research are presented in the chapter dedicated to research support.

Austria

- Agrarmarkt Austria (AMA) is a public body established in 1993 under the supervision of the Federal Ministry of Agriculture, Forestry, Regions and Water Management. It is responsible for promoting and supporting agricultural products. Its tasks include monitoring agricultural markets and prices, as well as managing payments for environmental services. This organisation publishes data on the Austrian organic market.

- BIO AUSTRIA is the Austrian organic association. Founded in 2005 following the merger of several organic associations, it has around 13,500 members.
It has established a private set of standards[1]. It acts as the spokesperson for its members in their dealings with the Austrian government and the European Union, while also providing them with advice and support.
BIO AUSTRIA has also developed partnerships with major retail chains for the use of its logo and has created an online interactive map, Biomaps, listing certified organic businesses.

- Each Land has its own chamber of agriculture. These bodies advise organic farmers and organise training programmes.

- The Federal Ministry of Agriculture, Forestry, Regions and Water Management supports organic farming through training, technical advice and information campaigns. It funds research and innovation projects in the organic sector. It also takes part in consumer awareness campaigns aimed at promoting organic farming.

Belgium

Flanders

- BioForum Vlaanderen, established in 1998, is the main Flemish organic organisation. It acts as the representative body of the Flemish organic sector in relation to public authorities. BioForum Vlaanderen carries out advisory, research and networking activities among organic operators and provides its members with communication tools.

- The Department of Agriculture of the Flemish Government sets the goals for organic farming at the regional level. It promotes the conversion of farms to organic production and oversees the certification bodies.

1- Mixed farming (organic and conventional production within the same farm) is not allowed.

Wallonia

- APAQ-W is the Walloon agency for the promotion of quality agriculture. This public-interest body was established in 2002 and is responsible for promoting organic farming in Wallonia.

- Biowallonie is the support structure for the organic sector in Wallonia. It supports all organic actors, from production to processing, distribution and both collective and commercial catering. Established in 2013, its main tasks are to inform and assist professionals, share best organic techniques and practices, facilitate economic exchanges between operators, contribute to the structuring of the sector and promote training.

- CRABE is a non-profit association established in 1976. CRABE is a training and local action centre focused on organic practices and food self-sufficiency, with strong field presence.

- The Public Service of Wallonia manages the development plan for organic farming and oversees organic certification.

- UNAB, founded in 1984, supports and represents Walloon organic farmers. It provides them with technical assistance and information tailored to their needs.

Bulgaria

- Bioselena Foundation is an NGO established in 1996 by FiBL, whose mission is to support organic farming by providing specialised services to organic farmers and processors (technical and strategic advice, administrative assistance), promoting organic products to consumers and contributing to the development of national legislation and policies.
Since 2003, it has operated a professional training centre, which has already provided training to over 3,000 farmers, processors and other stakeholders.
The foundation organises an organic market every Wednesday in Sofia, as well as an annual organic festival, in partnership with the Ministry of Agriculture and Food. Bioselena Foundation is also a co-founder and shareholder of one of the country main certification bodies, Balkan Biocert.

- There are several organic associations in Bulgaria, the largest of which is BOPA, founded in 2009 and counting around 300 members.
The association Bioproduct BG, co-founded in 2004 by Bioselena Foundation and the company Bio Bulgaria, has the primary mission of uniting all efforts to develop the organic market in Bulgaria.

- Until a few years ago, the Ministry of Agriculture and Food played a limited role in supporting organic farming. Its involvement was primarily restricted to administrative support for subsidy applications related to organic production.
In 2023, the ministry participated for the first time at Biofach, with a large organic stand.

Croatia

- The Croatian Agency for Agriculture and Food is responsible for the certification of organic products, managing inspections and issuing official labels.

- Since 2017, the eleven organic producer organisations have been grouped within a federation, the Croatian Organic Farmers Associations Alliance (HSEP). It gathers around 200 organic producers. HSEP is primarily dedicated to defending the interests of and representing organic producers. The federation also works to raise public awareness of the benefits of organic products, facilitates training and the sharing of best practices among its members and collaborates with national authorities to influence organic legislation.

- The Ministry of Agriculture has a department dedicated to organic farming, which oversees the implementation of support programmes and ensures compliance with EU standards. It has also established free courses for organic producers.

Cyprus

- Cyprus Organic Farmers Association is the national association of organic producers. Established in 2002, it serves as the representative body for Cypriot organic producers in relation to national and international authorities, organises training sessions and workshop, and raise public awareness of the benefits of organic farming.

- The Ministry of Agriculture is responsible for promoting organic farming in Cyprus. It oversees official inspections, manages a national register of organic farms, provides information and technical advice and organises training for farmers.

Czech Republic

- Founded in 2010, BIOSAD promotes organic fruit growing in the Czech Republic, focusing on providing information to farmers producing healthy, high-quality fruits.

- The Ministry of Agriculture ensures compliance with organic farming regulations and accredits certification bodies. It also implements awareness campaigns on organic farming.

- PRO-BIO is the oldest Czech organic association. Founded in 1992, it represents organic producers and processors, supporting them with information, advice, services and promotional activities.
It has two affiliated associations: one dedicated to member organic shops and the PRO-BIO League. The latter handles public education on organic food and farming, public relations, organises the traditional annual organic fair in Prague and maintains a map of organic points of sale, including farms and local stores.

- ÚKZÚZ[1] is the Central Institute for Supervising and Testing in Agriculture, founded in 2002. It is the competent authority for the regulation and control of organic farming in the Czech Republic. It oversees compliance with organic production standards, conducts inspections and collaborates with certification bodies.

1- Ústřední kontrolní a zkušební ústav zemědělský

- UZEI[1] is the Institute of Agricultural Economics and Information. It was established in 2008 and operates under the Ministry of Agriculture. It conducts applied research on agricultural economics, agricultural markets, the relationship between agriculture and the environment and rural development. It is also responsible for collecting, analysing and disseminating statistical data and information for the entire agricultural sector, including the organic sector. Additionally, the institute manages the training and accreditation system for agricultural advisors (including for organic farming) in collaboration with the Ministry and provides technical support for agricultural policies and rural development programmes.

Denmark

- The Danish Agriculture and Food Council (Landbrug & Fødevarer), established in 2009, represents the Danish agricultural and food industries, trade associations and farmer organisations.
It plays a role in shaping agricultural and food policy, provides services to its members and implements research and development programmes.
It is highly involved in the organic farming sector and has defined a strategy for organic agriculture for 2024–2026, with key goals including improving yields, promoting agroforestry and strengthening the connections between organic producers and consumers through promotional activities both in Denmark and for export. It also publishes a magazine for organic farmers.

- The Ministry of Food, Agriculture and Fisheries defines the national agricultural development strategy and implements action plans. It funds conversion and maintenance subsidies, as well as research through specialised organisations such as ICROFS. The ministry also manages the use of the national "Ø" label and ensures compliance with certification rules.

- Organic Denmark (Økologisk Landsforening) is a national association, established over 35 years ago, gathering organic businesses, farmers, professional kitchens and consumers.
It supports companies in marketing their organic products, helps retailers develop their organic marketing strategies, advises organic actors on market trends and promotes Danish organic products at international trade fairs.
Organic Denmark also plays a key role in developing national action plans for organic farming and in shaping public policies in support of organic agriculture.

Estonia

- ARIB[2] is the public agency responsible for managing financial support for agriculture and rural development. It specifically handles measures for organic conversion and maintenance, as well as agri-environmental measures, while ensuring the administrative monitoring of payments and associated controls.

1- Ústav zemědělské ekonomiky a informací
2- Agricultural Registers and Information Board

- The Estonian Organic Farming Foundation (Eesti Mahepõllumajanduse Sihtasutus) is a non-profit organisation established in 2000. Its main missions are to promote the development of organic farming, to transfer knowledge between research and farmers, to train organic farmers and to raise public awareness of organic agriculture. It also takes part in discussions on public policies and publishes an annual report on Estonian organic farming statistics.

- The Estonian Organic Farming Platform (Eesti mahepõllumajanduse ümarlaud) was established by eight organic organisations in 2006. It coordinates actors in the organic sector, represents their interests and contributes to the development of organic farming in the country.

- The Estonian Organic Farmers' Association (Eesti Mahepõllumajanduse Ühendus) represents its members and advocates for their interests with public authorities.

- The Ministry of Agriculture defines the national organic farming policy, implements the Rural Development Plan as well as the 2023–2027 national CAP Strategic Plan and oversees the organic control system.

- Organic Estonia, founded in 2015, is an umbrella organisation that acts as a B2B platform for companies in the organic sector. It brings together certified producers and processors to strengthen collaborative marketing, increase the visibility of the "Estonia Organic Country" brand and support the export of Estonian organic products.

Finland

- The Finnish Food Authority is the public body responsible for overseeing organic farming in Finland. It coordinates the national control system, approving and monitoring certification bodies. It ensures compliance with EU regulations, particularly regarding production, livestock, processing and labelling. It also informs consumers and professionals about the reliability of the organic label.

- Pro Luomu is the national association for the development of organic farming. Established in 2011, it brings together producers, processors, distributors and catering sector actors. Its missions are to promote organic farming and to support the development of the national organic market and the export of organic products.

- The Ministry of Agriculture defines the national strategy for organic farming and oversees its implementation. It coordinates the national Rural Development Programme and leads the Finnish CAP Strategic Plan.

- Ruokavirasto, the Finnish Food Authority, manages the organic control and certification system. It oversees the certification bodies.

France

- ABiodoc is the French national resource centre for organic farming. Established in 1993, it operates under VetAgro Sup. It conducts documentary monitoring on organic farming by collecting, organising and disseminating scientific and technical information. It publishes a monthly bibliographic review.

- Established in 2001, Agence BIO is the French agency for the development and promotion of organic farming. This Public Interest Group operates under the supervision of the Ministries of Agriculture & Food Sovereignty and Ecological Transition. Its other members include FNAB, Chambres d'Agriculture France, Coopération Agricole, Synabio, FCD and Interbio.

Agence BIO provides information on organic farming and promotes it to the general public. It manages the Avenir Bio Funds, which contributes to structuring the French organic sector. It has an observatory for organic farming in France and internationally, to monitor developments in organic production and market. It also implements actions to increase the use of organic products in food service.

- The Chambers of Agriculture provide support and advice to organic farmers and those converting to organic farming. They organise training sessions and can assist producers in completing their subsidy application files. They facilitate connections among organic sector actors within regions. They organise events to raise awareness of organic practices and engaged producers, including Tech & Bio. They conduct studies on organic farming and publish technical guides.

- Coopération Agricole (founded in 1966, formerly CFCA) is the organisation representing French agricultural cooperatives. It has an Organic Farming Commission responsible for developing organic sectors, supporting cooperatives and advocating for their interests with public authorities.

- The National Federation of Organic Agriculture (FNAB) is an association founded in 1978. It is the only organic producers' union in France and gathers around 10,000 organic farms.

FNAB represents organic producers to public authorities. It supports them in converting their farms, offers training and raises public awareness about the benefits of organic farming.

FNAB is composed of 13 regional groups (FRAB) and nearly 90 local groups (GRAB).

- ForéBio is a federation bringing together 15 fully organic producer economic organisations, established in 2018. It represents the interests of organic producers to public authorities and supports them in their transition towards more sustainable and responsible practices.

- FranceAgriMer publishes statistics on the collection of organic milk and arable crops, as well as on the products derived from them. It also conducts occasional studies on organic farming.

- INAO approves certification bodies, ensures the proper application of EU and French standards relating to organic farming, manages derogations and protects the national AB logo against fraudulent use while ensuring its compliance, in collaboration with the Directorate General for Competition Policy, Consumer Affairs and Fraud Control.

- Interbio organisations are regional interprofessional associations dedicated to organic farming. These structures gather local stakeholders in the organic sector (producers, processors, distributors, local authorities and training organisations) to

structure, promote and develop organic farming within their regions. In 2025, there were eight such organisations[1].

- French agricultural interprofessional organisations are bodies that gather producers, processors and distributors within a single sector in order to coordinate economic development, promotion and market regulation. They are officially recognised by the State and play a key role in structuring agricultural sectors.
Several of them have a commission dedicated to organic farming: CNIEL, CNIPT, INTERCEREALES/Terres Univia, INTERBEV and INTERFEL. These organic commissions contribute to better integrating organic production into the overall strategies of French agricultural sectors.

- Maison de la Bio was established in 2021 to bring together economic stakeholders in the organic sectors. It represents the interests of its members to public authorities.

- The Ministry of Agriculture and Food Sovereignty defines the national strategy for organic farming (through the Ambition Bio programme) and oversees organic certification. It coordinates the actions of various public stakeholders, directs funding dedicated to the development of the organic sector and ensures the implementation of the EU and national regulatory framework.

- Natexbio is a federation bringing together several organic professional unions: Synadis Bio, Synabio and Synadiet[2]. It promotes the organic sector, represents these professional unions before political and institutional bodies and organises the Natexpo trade fair. It also plays a role in regulatory monitoring of organic certification for distributors.

- ONVAR (National Organisations for Agricultural and Rural Development) are structures recognised by the State for their role in agricultural development, innovation and support to farmers. Among them, the CIVAM[3] network supports farmers in transitioning towards more autonomous, resource-efficient and sustainable systems. It has long been strongly involved in organic farming development, providing support for conversion, facilitating exchanges of practices, offering training, conducting experimentation and helping structure local organic value chains.
Associations for the Development of Agricultural and Rural Employment (ADEAR) work to support farm continuity and new farm establishment based on the values of peasant farming.

- Synabio is the national union of organic agri-food companies, established in 1976. It currently represents around 230 member companies, mainly processors, wholesalers and organic distributors, the majority being SMEs.
It supports its members on regulatory, technical and strategic issues and advocates for their interests with public authorities. The union also promotes corporate social responsibility through its BioEntrepriseDurable label.

1- Interbio Bretagne, Interbio Corse, Interbio Nouvelle-Aquitaine, Interbio Occitanie, Interbio Pays de la Loire, Interbio Auvergne-Rhône-Alpes, Interbio Centre-Val de Loire and A Pro Bio in Hauts-de-France

2- Dietary supplements

3- Centres for Initiatives to Promote Agriculture and Rural Areas

Synadis Bio is the national union of distributors of organic and dietary products. Founded in September 1999, it gathers over a thousand of shops, whether independent or part of a network. The union defends the professional, material and moral interests of its members. Synadis Bio informs them about regulatory developments, market trends and best practices and also provides training tailored to the needs of organic shops.

Germany

AMI[1], founded in 2009, collects and analyses all relevant information on the German and European agricultural markets. It publishes data, forecasts and analyses on production, prices, supply and demand. It also conducts detailed studies on organic farming, covering production, imports, land area, livestock and consumption trends.

Bioland, Naturland and Demeter are organic associations whose private standards[2] are stricter than the EU organic regulation. They also perform multiple functions: professional union, political lobbying, marketing, training, technical and economic advisory services and connecting upstream and downstream actors.
Bioland originated from the Bio Gemüse association, founded in 1971, which became Bioland in 1979. The first products marketed under the Bioland brand appeared in 1981. Since 2000, the association has also certified restaurants.
Naturland, founded in 1982, has been active beyond Germany since 1987.
Demeter, the oldest German organic association, was founded in 1924. Its standards are based on the principles of biodynamics.
Other local associations also exist, such as Biokreis, founded in 1979 in Bavaria.
Ecovin is an association dedicated to organic viticulture. Founded in 1985 by a group of organic winemakers from several wine regions, it forms the largest network of organic winemakers in Germany, representing about a quarter of the country's organic vineyards.

Late 2001, the Federal Ministry of Agriculture launched the federal programme for organic farming, BÖL[3], which officially began its activities in 2002. The programme aims to improve the framework conditions for organic farming and the food industry in Germany, while promoting a balanced growth of supply and demand. It is a key instrument for implementing the Bio Strategy 2030.
Within the framework of BÖL, information campaigns and research programmes[4] are funded. The Oekolandbau website[5] provides extensive information on organic farming.

1- Agrarmarkt Informations-Gesellschaft
2- There are other organic associations with private standards: Biokreis, Ekoland, Biopark, Gäa, and others.
3- Bundesprogramm Ökologischer Landbau
4- Around 1,800 research programs have been supported since the launch of BÖL.
5- http://Oekolandbau.de

Since 2023, BÖL has had an annual budget of around €35 million: approximately €20 million is allocated to research, while the remaining €15 million finances training, pilot projects and other initiatives.

- The Federal Office for Agriculture and Food (BLE), founded in 1995, is a German public authority under the supervision of the Federal Ministry of Agriculture. It is responsible for implementing the BÖL programme and also carries out other tasks related to organic farming: managing public funds for conversion and maintenance, overseeing organic standards, coordinating inspections by certification bodies, providing technical support, offering training, promoting organic farming and producing statistics.

- BÖLW[1], founded in 2002, is the Federation of the Organic Food Industry. It is the umbrella association for organic farmers, processors and food retailers. It has 16 member associations covering the entire organic value chain, from production to distribution.
BÖLW acts as the spokesperson for the organic sector to national and EU institutions, as well as to the public. Its goal is to achieve recognition for the ecological, economic and social services provided by the organic food industry.

Greece

- The Ministry of Agriculture defines the national agricultural policy and the 2023–2027 CAP Strategic Plan, which includes support measures for organic farming. It implements organic conversion and maintenance subsidies.

- OPEKEPE, the national paying and control agency, manages the processing and disbursement of organic farming subsidies.

- The Greek Organic Farmers' Union was founded in 2001. It works to promote and defend organic farming, with a focus on product quality and compliance with environmental standards.

Hungary

- The Hungarian Agricultural Payment Agency (Magyar Államkincstár – MÁK) is responsible for managing and disbursing CAP payments to farmers, including those for organic farming.

- Biokultúra is a pioneering organic association, founded in the 1980s. It gathers farmers, processors and organic consumers. It regularly organises training sessions, conferences and advocacy activities to strengthen policies in favor of organic farming.

- The Hungarian Organic Farming Association, Magyar Biokultúra Szövetség, was founded in 1987. This umbrella organisation of the Hungarian organic movement represents its members at both national and international levels. It is active in promotion, awareness-raising and international cooperation.

1- Bund Ökologische Lebensmittelwirtschaft

The Ministry of Agriculture sets the national agricultural policy and implements the 2023–2027 CAP Strategic Plan. It coordinates support measures for organic conversion and maintenance (direct payments and agri-environmental schemes) and oversees the organic certification and control system.

Ireland

Bord Bia, established in 1994, is the national agency for the promotion of Irish agri-food products. It promotes Irish organic products both domestically and internationally. It also provides advice to improve the quality, traceability and sustainability of organic products. The agency conducts market analyses to identify trends and opportunities in the organic sector.

The Department of Agriculture, Food and the Marine (DAFM) is responsible for national agricultural policy and the CAP Strategic Plan. It manages support schemes for organic farming, including payments for conversion and maintenance.
It also supervises approved inspection and certification bodies and coordinates the collection of organic data.

The Irish Organic Farmers and Growers Association (IOA) [1] was founded in 1982. It is the main certification body and has established private standards that go beyond EU regulations. In addition to certification, it supports producers through advice and training, promotes organic farming and represents the interests of the organic sector to public authorities.

Italy

AIAB (Associazione Italiana per l'Agricoltura Biologica) is an association founded in 1988, bringing together producers, processors, researchers, technicians and consumers committed to organic farming in Italy. It represents the interests of organic producers by promoting organic agriculture as a model of sustainable development. The association supports its members with technical and administrative assistance, specialised training, awareness-raising activities and political representation at the local, national and EU levels.

Biobank is a database on the Italian organic market. Established in 1993, it collects and centralises detailed information on the actors and trends of the Italian organic sector. Biobank also publishes studies and reports aimed at professionals and researchers in the sector.

Federbio is the national federation for organic and biodynamic farming. It was established in 1992 to protect and promote the development of organic and biodynamic agriculture. It plays a key role in promotion, lobbying and structuring the sector. Federbio acts as the spokesperson for organic actors with national and regional institutions, actively participating in policy discussions on agricultural and environmental issues. It provides training and advisory services to producers, processors and distributors of organic products. Federbio also collaborates with research institutions to promote sustainable farming practices and support the development of innovative solutions in the organic sector.

1- Its former name is the Irish Organic Farmers and Growers Association (IOFGA)

- ISMEA[1] is the Italian public agency dedicated to the analysis, support and financing of the agricultural sector. It collects and disseminates strategic data on agricultural markets, including the organic farming sector.
ISMEA supports organic farms through financial instruments, guarantees and programmes for young farmer.

- Ministry of Agriculture defines the national agricultural strategy and coordinates the 2023–2027 CAP Strategic Plan and the National Action Plan for Organic Farming. It oversees the national organic control system.

- Established in 2000, SINAB[2] is the official Italian platform dedicated to the collection, management and dissemination of organic data. Set up and funded by the Ministry of Agriculture, it centralises information on organic production, processing, distribution, consumption and imports. SINAB relies in particular on ISMEA to produce its analyses. It publishes "Bio in cifre" each year, providing a national overview of organic farming.

Latvia

- Latvijas Bioloģiskās lauksaimniecības asociācija (LBLA) is the Latvian organic association, founded in 1995. It mainly brings together regional agricultural organisations, farmers, processors and researchers, and today has around 1,500 members. It represents the interests of organic producers.
Its main goals are to support organic farming development, expand markets for organic products, establish a training and professional development system for organic farmers and promote the consumption of organic products.

- Lauku atbalsta dienests is the national agency that manages CAP payments (direct aids, environmental measures, organic). It serves as the administrative contact point for organic farmers.

- The Ministry of Agriculture defines the national strategy and measures for organic farming within the CAP Strategic Plan. It oversees regulations and the organic certification system, monitors sector statistics, evaluates environmental performance and ensures compliance with EU standards. It also supports the promotion of organic farming, including information campaigns and initiatives aimed at strengthening demand and the competitiveness of Latvian organic producers.

- The National Plant Protection Service is responsible for maintaining an electronic database of seeds and vegetative propagation material produced organically. Another goal is to issue exemptions for the use of seeds and vegetative propagation material not produced according to organic methods within organic production.

- The Agricultural Data Centre[3] manages agricultural data, including organic farming, by collecting, analysing and disseminating statistical information on the production, processing and marketing of organic products.

1- Istituto di Servizi per il Mercato Agricolo Alimentare
2- Sistema di Informazione Nazionale sull'Agricoltura Biologica
3- Lauksaimniecības datu centrs

Lithuania

- The Chamber of Agriculture of the Republic of Lithuania has been providing guidance on organic farming since 1993, including individual advice, seminars, training sessions and conferences. It also supports farmers with organic certification, the development of sustainable farming practices, crop and livestock management according to organic standards, as well as the marketing and promotion of organic products on the national and international markets.

- The EMGAA (Lithuanian Organic Livestock Farmers' Association) was founded in 2010 and is dedicated to promoting organic beef farming. It supports its members through technical advice, training and the exchange of best practices. The organisation also takes part in promoting organic products to consumers and markets.

- The Lithuanian Organic Farms Association (LEŪA) promotes organic farming, the production and consumption of healthy food and environmental protection. Founded in 2010, it is the largest Lithuanian organic organisation. It provides technical support and training to farmers, facilitates access to organic markets and contributes to the development of public policies supporting sustainable agriculture.

- The Ministry of Agriculture is responsible for national agricultural policy, including the regulation and funding of organic farming. It also oversees sustainable agriculture support programmes and coordinates national and EU subsidies for organic farms. The ministry develops standards and guidelines for organic production, monitors sector statistics and supports organic certification. It also promotes awareness of organic farming and food safety among farmers and consumers.

- The NPA is the national paying agency, managing, in particular, subsidies for organic farming.

Luxembourg

- The Administration of Technical Agricultural Services (ASTA), established in 1967, plays a central role in the development and support of the agricultural sector. It implements technical policies aimed at improving productivity, modernising farming practices and fostering technological innovation. It is also tasked with promoting and supporting the development of organic farming by providing tailored technical assistance and a dedicated service.
ASTA advises farmers on organic production methods and organises training and awareness programmes to facilitate conversion to organic farming. It collects and analyses data on organic production to guide public policy. Organic operators must notify ASTA of their activities.

- Vereenegung fir Biolandwirtschaft Lëtzebuerg (VBL) is a professional association representing the interests of organic producers in Luxembourg, founded in 1988. It advocates for its members' interests and participates in promoting organic farming, including organising Organic Week.

Malta

- The Malta Organic Agriculture Movement is an organisation founded in 1999, dedicated to promoting organic farming in Malta. It brings together farmers, consumers and technical experts. Its role includes raising public awareness about organic farming, organising training sessions and representing the interests of organic agriculture at both local and international levels.

- The Ministry of Agriculture supports organic farming through the National Action Plan for Organic Food 2023–2030. It funds organic projects, establishes standards and guidelines for organic production and oversees farm certification. The ministry also provides training and technical advice to farmers and promotes the consumption of organic products among consumers.

The Netherlands

- Bionext is the umbrella organisation for organic agriculture and food, established in 2016. It represents and advocates for the interests of organic farming with public authorities. It conducts campaigns to promote organic consumption and also supports businesses through technical advice and the development of professional networks.

- The Ministry of Agriculture develops national guidelines for organic farming, supports its development and collects statistics on organic production and consumption.
Research and innovation are also supported to improve the efficiency and profitability of organic farming.

- The RVO[1] is a government agency, founded in 2014, that supports businesses, including those in organic farming, in their national and international activities. It provides information, advice and various financing schemes.

Poland

- Founded in 1989, EKOLAND is the first national organisation of Polish organic producers. It brings together farms certified according to standards stricter than EU's, prohibiting mixed production on the same farm. The association supports organic promotion and the exchange of expertise.

- The Forum of Organic Agriculture (Mieczyslaw Górny) is a non-governmental organisation bringing together scientists, producers and stakeholders in the organic sector, founded in 2009. Its goals are to strengthen the organic farming sector in Poland, promote organic products, carry out educational activities to raise public awareness and influence agricultural policies.

- The Ministry of Agriculture and Rural Development is responsible for implementing organic farming policy.
IJHARS, the Agricultural and Food Quality Inspection, operates under the Ministry of Agriculture. It supervises certification bodies and is responsible for decisions regarding exemptions from organic production rules.

1- Dutch Agency for Companies

PIŻE, the Polish Chamber of Organic Food, is an organisation bringing together organic farmers, processors and distributors, founded in 2016. Its mission is to promote organic products through educational campaigns and professional events and to collaborate with the Ministry of Agriculture and other public institutions.

Portugal

AGROBIO (Associação Portuguesa de Agricultura Biológica) is the national association for organic producers and consumers. It was founded in 1985 and promotes the development of organic farming in Portugal. It provides technical advice, training and environmental education. The association is active in research and the promotion of local markets and it organises events[1].

The Ministry of Agriculture is responsible for the regulation and supervision of organic production in Portugal. It develops national policies, sets certification standards and monitors their implementation. It supports the development of organic farming through subsidies, training programmes and sustainable initiatives. The ministry also collects data on organic production and consumption to monitor the market.

Romania

Bio Romania is a producers association founded in 2008 to represent a number of processors and large producers at the international level, raise consumer awareness of the benefits of organic farming for human health and the environment and promote the consumption of organic foods. It has over 300 members.

The National Federation of Organic Agriculture in Romania was founded in 2000 through the merger of five pioneering organic associations. It aims to promote environmentally friendly farming practices and support the Romanian organic producers. The federation plays a key role in training and disseminating sustainable agricultural best practices.

Inter-Bio was established in 2008. This interprofessional organisation is dedicated to promoting organic agri-food products. Its other missions include supporting the export of organic products and developing professional training, research and innovation in organic farming and agroecology.

The Ministry of Agriculture develops and implements the national policy on organic farming (promotion, training and support for conversion) and oversees the organic certification system. It also provides financial support to the sector.

1- Like the national fair Terra Sã

Slovakia

- Ekotrend Slovakia[1] is an NGO with 162 members, including farmers, processors, producers, experts and stakeholders in organic farming and sustainable living. It was founded in 1997. The organisation works to promote organic farming by supporting producers and raising public awareness of the benefits of this method of production.

- UKSUP[2] is the competent authority in Slovakia for organic production. Operating under the Slovak Ministry of Agriculture and Rural Development, it ensures the implementation of national and EU regulations on organic farming. UKSUP supervises certification bodies and is responsible for the registration of organic operators. The institute also organises training and awareness programmes for producers and consumers, aiming to promote sustainable farming practices and strengthen confidence in organic products.

Slovenia

- The Institute for Sustainable Development was established in 1995. Its mission is to implement organic farming and rural development. It conducts research and development projects, awareness and training activities on organic farming, provides advisory services to farms and facilitates networks. It also monitors indicators related to organic production and produces reports on Slovenian organic farming. Additionally, it contributes to the preparation of action plans.

- The Ministry of Agriculture sets the strategic and legislative goals for organic farming in Slovenia. It organises the organic certification system and ensures compliance with EU standards, provides financial and technical support for organic conversion and production and promotes and coordinates actors in the organic sector. It collects and analyses data on organic farms and land and supports farmer training.

- ZDEKS, the Association of Organic Farmers of Slovenia, was founded in 2017. It originated from several regional organic farmer associations and represents the Slovenian organic sector to policymakers while promoting cooperation in the field of organic farming.

Spain

At the national level

- Asobio is an association bringing together the main Spanish companies specialised in processing and marketing organic products. It was established in 2020 to strengthen the structure of the organic sector in Spain, promote organic consumption and defend the common interests of its members. It currently has around one hundred members.

1- Zväz ekologického poľnohospodárstva
2- Ústredný kontrolný a skúšobný ústav poľnohospodársky

- Ecovalia is the Spanish professional association for organic production. It celebrated its thirtieth anniversary in 2021[1]. It brings together organic producers, processors and distributors in Spain and had 17,000 members in 2025.
Its missions are to promote organic farming to producers and consumers, support organic producers and businesses through training and advisory services and defend the interests of the Spanish organic sector. It also publishes an annual report on organic farming.

- FEPECO is the Spanish federation of organic businesses. Founded in 2009, this organic business association operates nationally and internationally to defend the economic interests of organic companies and promote their products.

- INTERECO forms the network of public authorities responsible for the control and certification of organic farming in the various autonomous communities of Spain. Established in 1999, it is based on a cooperative structure between public organic control bodies, aiming to strengthen coordination and harmonization at the national level.

- The Ministry of Agriculture, Fisheries and Food oversees and funds the Spanish organic sector. It develops national policies in support of organic farming, coordinates the autonomous communities, which are responsible for implementation and control and publishes an annual national report on organic production and processing statistics. It also conducts national campaigns to promote organic consumption among Spaniards.

- SOW (Spanish Organic Wines) is the Spanish association of organic wine producers and exporters. It was established in 2014 to give international visibility to Spanish organic wine and to bring together wineries committed to organic farming. Its activities focus on the international promotion of Spanish organic wines to boost exports.

- Founded in 1981, the Vida Sana Association is one of the pioneering Spanish organisations promoting organic farming, responsible consumption and a healthy lifestyle. It is recognised for having contributed to the development of the organic movement in Spain since the 1980s.
The association organises events, including the BioCultura fair, raises public awareness about organic farming and supports organic producers.

1- It took the name Ecovalia in 2010.

In the autonomous communities

The state bodies responsible for the control and certification of organic products, the management of the organic operator registry and the promotion of organic products are as follows:

Autonomous Community	Organisation
Andalusia	Junta de Andalucia (Regional Government of Andalusia)
Aragon	CAAE (Aragonese Committee for Organic Farming)
Asturias	COPAE (Council for Organic Agricultural Production of the Principality of Asturias)
Balearic Islands	CBPAE (Balearic Council for Organic Agricultural Production)
Canary Islands	ICCA (Canary Institute for Agri-Food Quality)
Cantabria	CRAE-CN (Cantabria Regulatory Council for Organic Farming)
Castile and León	CAECyL (Castile and León Council for Organic Farming)
Castile-la Mancha	Junta de Comunidades de Castilla-La Mancha (Regional Government of Castile-La Mancha)
Catalonia	CCPAE (Catalan Council for Organic Agricultural Production)
Extremadura	CAEX (Extremadura Committee for Organic Farming)
Galicia	CRAEGA (Galicia Regulatory Council for Organic Farming)
La Rioja	CPAER (La Rioja Council for Organic Agricultural Production)
Madrid	CAEM (Community of Madrid Committee for Organic Farming)
Murcia	CAERM (Murcia Council for Organic Farming)
Navarre	CPAEN-NNPEK (Navarre Council for Organic Agricultural Production)
Basque Country	ENEEK (Basque Country Council for Organic Farming)
Valencian Community	CAECV (Valencian Community Committee for Organic Farming)

Source : Agence BIO

Sweden

- Ekologiska Lantbrukarna, founded in 1985, is the Swedish organisation representing organic farmers to public authorities. It also promotes the development of organic farming in Sweden and provides technical advice, training and support for marketing organic products.

- Founded in 1997, Ekomatcentrum plays a key role in promoting organic food in public institutions and throughout the food supply chain. It works through information, training[1], networking and the organisation of competitions[2].

- The Ministry of Agriculture sets the main directions, national goals and support policies and ensures coherence with other goals (environment, biodiversity, rural development) and coordinates public stakeholders.

- Founded in 2001, Organic Sweden is a platform that facilitates collaboration between producers, processors and distributors to promote Swedish organic products in domestic and international markets. It also offers training, events and various resources to strengthen the competitiveness of sector stakeholders.

1- Ekomatcentrum offers training modules for chefs, food service staff and local authorities.

2- The annual Ekomatsligan competition rewards Swedish municipalities and regions with the highest share of organic products in the public sector.

National and regional development programmes

Alongside national strategic plans, several Member States implement national or regional development programmes. By 2025, most Member States had such programmes underway.

Austria

The 2023+ Organic Farming Action Programme was launched in December 2022[1] and will run until 2030. Its main goals are to expand production (to maintain Austria's position as the leading country for the share of the UAA grown organically) and to boost demand for organic products. The targets are 30% of UAA grown organically by 2027 and 35% by 2030.
The plan's key action areas are:

- Direct financial support for organic and converting farms
- Development of value chains and processing and promotion of the national organic logo,
- Research, innovation and knowledge dissemination in agricultural schools, higher education and among organic advisors,
- Growth of the domestic organic market (especially in Food service) through promotion and expanded monitoring by AMA and Statistics Austria.

Belgium

In Belgium, the plans are regional.

En Wallonie

A new Walloon organic plan for 2021–2030 was launched in June 2021[2].
The targets for 2030 are: 4,720 organic farms, 30% of UAA grown organically, 1,490 organic processing companies and a 14.9% market share for organic products.
The plan is structured around nine key axes:

- Monitoring the development of the organic sector and planning[3],
- Regulation,
- Information for the general public and professionals,
- Support for operators,
- Support for processing and distribution,
- Education and vocational training,
- Promotion of Walloon organic products,
- Research in organic farming,
- Innovation.

1- The first organic action program was launched in 2001. The current organic action plan is the sixth.
2- The first Walloon organic plan ran from 2013 to 2020.
3- Development and updating of sector-specific development plans

In Flanders

The Flemish strategic plan covers the period 2023–2027. By 2027, it aims to achieve a 5% organic market share, 5% of farms converted to organic, 5% of UAA under organic farming, 5% of the total value of animal production coming from organic sources and 5% of public catering supplied with organic products. Compared to the previous plan, this new strategy places greater emphasis on developing demand.
To achieve these ambitions, the plan is based on closely interconnected strategic goals:

- Stimulating demand for organic products,
- Optimising the organic value chain to make conversion more attractive and enable organic farming to integrate more sustainably into agricultural practices in Flanders,
- Strengthening the leading position of organic farming in terms of sustainability,
- Continuing investments in research, innovation and knowledge dissemination,
- Building on strong political guidance and a solid legislative framework to support organic growth in Flanders.

Promotion activities specifically target schools and young people. Organic Week is being organised again.
In addition, the government has decided to increase funding for VLAM, a portion of which is expected to benefit the organic sector.
Finally, financial support for organic farmers has been maintained, along with business advisory services, the dissemination of information and research results and networking activities.

Bulgaria

Early 2025, the national action plan for organic farming up to 2030 was approved by the Bulgarian government. It aims to increase the area of certified organic farmland and the number of organic operators, strengthen consumer confidence, develop the national market for organic products and promote conversion to organic farming. It is part of Bulgaria's National Strategic Plan for Agriculture and Rural Development 2023–2027.

Cyprus

The Cypriot organic plan 2023–2030 aims to bring organic farming to 10% of UAA by 2030 and to strengthen the entire value chain. It is structured around four axes:

- Developing organic supply,
- Stimulating demand,
- Strengthening skills and innovation,
- Improving sector governance.

To ensure its implementation, the Ministry of Agriculture has decided to establish annual monitoring, a coordination committee bringing together public authorities, certification bodies and economic stakeholders, as well as a strengthened data collection system to adjust actions over time.

Croatia

The 2023–2030 National Action Plan for Organic Farming[1] primarily aims to significantly increase the agricultural area under organic cultivation. It also seeks to strengthen the competitiveness of organic producers by improving market access, supporting innovation and structuring value chains to better meet demand.
It includes 27 measures organised around several key axes:

- Support for organic conversion and maintenance,
- Development of research and training,
- Improvement of farms' economic performance,
- Support for local organic processing,
- Promotion of organic products,
- Growth of consumption, especially in Food service.

Czech Republic

The current organic action plan covers the period 2021–2027[2]. The six targets for 2027 are:

- Achieving 22% of UAA under organic farming,
- Reaching 30% of arable land grown organically,
- Increasing the area of permanent crops grown organically by 10%,
- Achieving a 4% organic market share in retail sales,
- Achieving a 5% organic market share in Food service,
- Ensure funding for research and advisory services in organic farming proportional to the sector share of agricultural land.

This action plan specifically includes:

- Development of advisory services, training and research in organic farming,
- Better dissemination of research results in training programmes, including higher education,
- Improving the processing capacity of domestic organic products,
- Support for producer organisations,
- Better structuring of the organic sector,
- Promoting the use of organic products in collective catering, supported by training canteen staff,
- Creation of a Czech organic logo for domestic products,
- Promotion of organic products and strengthening consumer trust in organic farming to boost organic consumption,
- Improvement of statistical data collection.

1- The first organic program ran from 2011 to 2016.

2- This is the fourth Czech organic action plan. The first was launched in 2004.

Denmark

- In 1995, Denmark was the first country to implement an organic action plan.

- The national organic strategy[1], launched in 2021, aims to double the area grown organically by 2030 (target: 21% of UAA), as well as the domestic organic market (DKK 25.8 billion in retail and DKK 4.6 billion in Food service[2]) and organic exports (to reach DKK 5.8 billion[3]) compared with 2018.
The strategy is based on five main axes:

  - Development of organic areas
  - Development of the value chain and consumption,
  - Animal welfare and environmental protection,
  - Research and innovation,
  - Exports and competitiveness.

The Danish strategy combines financial measures, skills development, technical and marketing innovations and the promotion of environmental and social values.

Estonia

- The Organic Farming Action Plan 2023–2030[4] aims to support and develop organic farming. It is based on three pillars: production/processing, organic market and exports. By 2030, its goals are to reach 20% regular consumers of organic products, 14% of the financial value of agricultural production coming from organic farming and €80 million in organic exports.
The plan includes, in particular:

  - Investment support,
  - Development of organic aquaculture,
  - Promotion of the integration of organic farming into vocational and higher education, in order to train skilled farmers, disseminate best practices and stimulate innovation,
  - Increase of the consumption of local organic products,
  - Strengthening of national cooperation,
  - Improvement of the international competitiveness of Estonian organic sector.

Finland

- Key goals of the Luomu 2.0 programme by 2030[5] are:

  - Reaching 25% of UAA grown organically,
  - Expanding organic wild-harvest areas,
  - Increasing demand to achieve a 5% organic market share in retail and 25% in public catering,

1- It aligns with other initiatives promoting agriculture ecological transition, including plant-based foods, green protein, and green jobs.

2- i.e. €3.45 billon and €620 million

3- i.e. €780 million

4- This is the third Estonian organic plan. The first was launched in 2007.

5- The first Finnish organic development program ran from 2013 to 2020.

- Strengthening industrial processing and innovation capacities,
- Increasing organic product exports, with a target of €100 million,
- Creating an organic fish sector,
- Strengthening knowledge and skills in organic production,
- Modernising and strengthening anti-fraud controls.

France

At the national level

In April 2024, a new development programme, Ambition Bio 2027, was launched. It aims to achieve 18% of UAA grown organically by 2027 and is organised around three main pillars:

- Stimulating organic demand and restoring consumer trust (through communication campaigns, visibility and promotion efforts) as well as engaging retailers,
- Consolidating and developing resilient, well-structured, locally rooted organic sectors — by supporting production, processing and distribution, conducting economic and prospective studies and assisting operators,
- Supporting stakeholders in addressing economic, environmental and social challenges — especially through temporary cash-flow support for farms, strengthening management tools and providing support for innovation and research.

At the regional level

Several regions have introduced an organic farming plan, in particular the following:

- Grand Est: An Organic Plan up to 2027 was launched in 2024, aiming to reach between 315,000 and 330,000 hectares grown organically (i.e., 11% of the regional UAA), 5,600–5,700 organic farms (i.e., 14% of farms) and to keep the conversion dropout rate below 5%,

- Hauts-de-France: The 2023–2027 Organic Plan aims to expand the area grown organically, encourage farm conversions, support farmers engaged in organic agriculture and raise consumer awareness,

- Nouvelle-Aquitaine: The 2023–2027 Ambition Pact for Organic Agriculture aims to reach 18% of the regional UAA grown organically by 2027 and 25% of farms in organic production. The plan intends to further support young farmers and increase the use of organic products in high school canteens. It includes investment support, sector development initiatives and the promotion of organic farming,

- Occitanie: The 2023–2027 Bi'O Plan aims to reach 25% of the regional UAA grown organically by 2027. It focuses on supporting organic consumption and sector structuring, assisting farmers and businesses, fostering innovation and training and promoting local organic products.

Germany

In this country, agricultural policy is managed by both the federal government, which establishes the overall framework and the German Länder, each with its own Ministry of Agriculture.

At the federal level

In 2023, the German Minister of Agriculture launched a strategic plan to strengthen organic farming in Germany: the Organic Strategy 2030. It aims to motivate and engage all actors along the value chain to contribute to the development of an organic agricultural and food industry and to achieve 30% of UAA grown organically by 2030. 30 measures have been identified, grouped into 6 action areas:

- Aligning agricultural and food industry input markets with the growth goals of organic farming,
- Harnessing the performance potential of organic farming in production,
- Strengthening the processing and trade of organic foods,
- Promoting more sustainable nutrition through organic food,
- Developing research for organic agriculture and the food industry, improving networking, creating infrastructure and making knowledge and data available to stakeholders,
- Designing a coherent legal and financial framework and systematically aligning it with the 30% organic farming target.

An interim assessment is scheduled for 2026, with a final evaluation to follow in 2030.

In the Länder

In 2025, several Länder also had ongoing organic action plans:

- The Baden-Württemberg Organic Plan, launched in 2020, aims to facilitate farm conversions, reach 30–40% of UAA grown organically (up from 13.2% at the end of 2019) and meet local demand for organic products, especially in public catering. The plan also seeks to promote the regional organic label, strengthen knowledge transfer and consumer information[1], further structure the regional organic sector and increase its added value.
  The annual budget allocated to this plan is €4.5 million.
  Late 2024, the organic share in Baden-Württemberg's UAA had reached 15.3%.

- In Lower Saxony, the 2030 Organic Plan, launched in 2019, sets targets of reaching 10% of UAA grown organically by 2025 and 15% by 2030 (up from 4.1% late 2018). It also aims to develop sales of regional organic products, strengthen links between sector actors, improve knowledge transfer, research and training and raise public awareness. Late 2024, the organic share in the regional UAA was 6.0%.

- In Bavaria the BioRegio Bayern plan, launched in 2013, aims to reach 30% of UAA grown organically (up from 6.4% late 2012) and to stimulate organic

1- With the regional organic campaign: "Natürlich.VON DAHEIM," i.e. "Naturally. From here."

demand. Its priority areas are training, creation of new storage facilities, promotion of the regional logo, sector structuring, support for biodistricts, use of local organic products in public catering, conversion of public land to organic farming and the development of applied research. By the end of 2024 13.9% of Bavarian UAA was grown organically[1].

- In Hesse the 2020–2025 Organic Plan set ambitious targets: reaching 25% of UAA grown organically by the end of 2025 (up from 15.5% late 2019), developing sales of regional organic products, maintaining and increasing biodiversity, protecting the climate, structuring the sector, strengthening research, training and advisory services, improving animal welfare and positioning Hesse as a model region for organic farming. The total budget was around €32 million, four times that of the first plan in 2014. By the end of 2024 the organic share in the regional UAA was 16.6%.

- In Mecklenburg-Western Pomerania a framework support programme for organic farming was launched in 2024 (Ökokompetenz Mecklenburg-Vorpommern 2030), which includes measures for promotion, subsidies, local valorisation, processing and marketing of organic products. The target is to reach 20% of UAA grown organically by 2026 (up from 15.3% late 2023 and 15.4% late 2024).

- In North Rhine-Westphalia organic farming is integrated into the updated 2020 sustainability strategy, with the goal of increasing the share of UAA grown organically to 20% by 2030 (up from 6.0% in 2019). Actions focus on conversion, advisory services, information, training, investment, use of local organic products in public catering and the development of biodistricts. Late 2024 the organic share in the regional UAA was 6.1%.

- In Rhineland-Palatinate the second Organic Plan[2], launched in 2020, includes 48 measures grouped into four areas: organic farming development, training, research and expansion of regional organic sectors. A medium-term target of 20% of UAA grown organically has been set (up from 11.2% late 2019). No specific timeframe has been defined. The plan will be updated at regular intervals. Late 2024 the organic share in the regional UAA was 13.0%.

- In Saxony the Organic Strategy launched in 2023 does not set any numerical targets or deadlines. It focuses on supporting farm conversions, promoting organic products, providing economic and technical assistance to producers and raising consumer awareness to increase local demand.

- In Thuringia the 2023 policy strategy aims to ensure balanced growth of organic farming, market-oriented and environmentally friendly, up to 2027. The strategy includes strengthening the role of organic farming in education, improving organic production through research and innovation and developing regional value chains to increase the supply and use of local organic products.

1- The German organic sector believes that Bavaria will fail to reach its target of 30% of UAA under organic farming by 2030. The share increased by only 0.3 points between 2023 and 2024.

2- The first organic plan dates back to 2018.

Hungary

The National Action Plan 2022–2027 for the Development of Organic Farming[1] sets out multiple targets across seven main areas of action:

- Coordinating local CAP support instruments for the development of organic farming,
- Increasing national supply and demand[2] by further stimulating organic food production, developing organic value chains and the role of organic products in public markets and implementing information and promotion campaigns,
- Addressing the specific mechanisation needs of organic farming, thereby reducing difficulties caused by labour shortages,
- Preserving and strengthening organic farming training and education, both in vocational and higher education settings,
- Establishing and expanding the advisory and expertise network for organic farming by developing a professional advisory system, sharing knowledge on organic farming, creating expert working groups and an online knowledge base, thereby increasing farmers' access to information,
- Strengthening research, development and innovation in the field of organic farming,
- Improving the audit and certification system.

Ireland

In 2018 the Ministry of Agriculture launched the National Strategy for Organic Farming 2019–2025[3]. Its main goal is to strengthen organic production to meet growing domestic and export market demand while providing farmers with up-to-date technical advice. The strategy includes financial support for organic farms, dissemination of best practices and assistance with conversions to organic farming. In 2019 the organic farming support programme was relaunched, reaffirming the State's commitment to farmers in conversion.

To implement some goals of this strategy, the Ministry launched in 2023 the "Growing Organics" programme, led by Teagasc. With an annual budget of €150,000 over five years, it encourages sustainable and economically viable farming practices. It is based on demonstration farms. Teagasc also provides guides and technical sheets to facilitate conversion to organic farming.

"Growing Organics" continues the mission of the 2019–2025 strategy, with a focus on knowledge transfer and the economic viability of farms. In 2023, twelve organic projects were selected for a total financial support of €1.1 million (covering research, promotion of organic meat, training, school canteens supply and more).

1- This is the second Hungarian organic action plan. The first ran from 2014 to 2020.

2- Goal to reach 5% of the organic retail market by 2027.

3- This period coincides with the Food Wise 2025 strategy, which is the overall strategy for Irish food and beverage sector.

In 2024, the Ministry launched the National Strategy 2024–2030, building on and reinforcing previous initiatives, with greater emphasis on environmental sustainability and economic viability.
Its primary aim is to triple the value of Irish organic production to €750 million by 2030, focusing especially on the dairy, poultry, beef and sheep meat and arable crop[1] sectors. The strategy comprises 51 actions across the entire value chain, with the main priorities being:

- Providing financial and technical assistance to organic producers,
- Facilitating access to land and resources for organic farmers,
- Implementing initiatives to attract young farmers to the organic sector.

Italy

The 2023–2025 National Action Plan for Organic Farming seeks to expand organic agriculture and strengthen the "Made in Italy" brand. The plan main goals are to:

- Expand agricultural land grown organically and encourage conversion,
- Create a national Italian organic label (guaranteeing quality and traceability),
- Promote the creation of biodistricts,
- Support cooperation between producers and sectors to enhance added value,
- Increase demand by organising information campaigns,
- Encourage public canteens to use more organic products,
- Strengthen traceability and certification to improve consumer trust,
- Encourage organic research[2] and innovation.

The plan supports adopting digital tools to monitor both agricultural areas and products.

Although there do not appear to be any current regional plans, several regions have set up funds to support organic farming, including:

- Friuli-Venezia Giulia: €6.7 million for organic production and mountain areas, aimed at supporting biodiversity and mitigating climate change, for 2023–2027,
- Piedmont: Over €6.5 million for biodistricts, for 2023–2027,
- Tuscany: €600,000 to promote the use of organic products in public canteens, for 2023–2025.

Latvia

Latvia has established a National Plan for the Development of Organic Farming 2023–2030[3], aiming to accelerate the conversion to organic farming.
The plan focuses on three main pillars: supporting farm conversion, enhancing local processing to generate greater added value and developing short supply chains to connect producers and consumers.

1- There are also targets for the development of organic exports, which are detailed in the chapter on exports.
2- Projects on organic medicinal and aromatic plants are among the priorities.
3- The first Latvian organic plan was launched in 2003.

It also promotes production diversification (particularly in livestock, horticulture and aquaculture) while strengthening training, certification and control systems.

Luxembourg

The National Action Plan for the Promotion of Organic Farming in Luxembourg, called PAN-Bio 2025[1], aimed to increase the share of land grown organically in Luxembourg to 20%[2] by 2025. It was based on four strategic pillars:

- Assessing the current situation of Luxembourg's organic sector to act in a targeted manner,
- Improving organic visibility to boost sales,
- Increasing the attractiveness of organic production methods to expand organically grown land,
- Developing and implementing various production, processing and marketing channels to increase supply and demand.

In December 2025 the Luxembourg Minister of Agriculture presented the new National Action Plan PAN-Bio 2030 for organic farming. The goal is to reach 15% of UAA grown organically by 2030, as the previous target was considered too ambitious. A second goal is to achieve 30% organic products in Restopolis canteens. The new plan is structured around four main strategic pillars:

- Creating a favourable framework for organic farming development,
- Supporting organic and in conversion farmers,
- Strengthening value chains and market opportunities,
- Promoting consumption while ensuring effective governance.

Malta

The National Action Plan 2023–2030 for Organic Food Products targets 5% of UAA grown organically by 2030 and aims to:

- Strengthening local organic production,
- Diversifying crops,
- Facilitating consumer access to organic products,
- Consolidating the organic sector: technical support, financial subsidies for farm conversion and maintenance, access to certified seeds, incentives to lease land for organic production, development of processing and marketing infrastructure and promotion of organic consumption.

The plan also focuses on environmental and social goals, including public health, biodiversity conservation and efforts to fight climate change.

1- This is the fourth Luxembourgish organic plan. The first was launched in 2009.

2- During the first year of the organic plan, the share of UAA under organic farming increased from 4.6% late 2019 to 5.18% late 2020.

The Netherlands

The 2023–2030 Action Plan for Growth in Organic Production and Consumption has the main goal of reaching 15% of UAA grown organically by 2030. It is based on three complementary pillars:

- Increasing demand for organic products,
- Increasing organic production,
- Developing knowledge and innovation.

To stimulate demand, the plan provides for:

- Making organic products more visible and accessible, especially in supermarkets, markets and public catering,
- Providing consumers with more information on the benefits of organic products.

To strengthen production, it provides for:

- Encouraging farm conversions, particularly in livestock farming,
- Promoting crop diversification,
- Promoting collaboration between producers, processors and distributors.

Poland

The 2021–2030 Polish National Organic Action Plan, updated in 2022, targets 7% of UAA grown organically by 2030. It is structured around five key pillars:

- Knowledge transfer,
- Promotion and education,
- Innovation,
- Support for organic producers,
- Maintaining consumer trust.

Portugal

At the national level

The National Strategy for Organic Farming spans 2017–2027. Its three main aims are to double the area grown organically and national processing capacity, boost organic product consumption and develop an experimentation network. In particular, the strategy provides for:

- Introducing organic products in canteens,
- Establishing a National Organic Food Day,
- Encouraging the integration of organic ranges in wholesale markets,
- Taking local and national initiatives to promote organic products,
- Distributing educational materials on organic farming to schools.

At the regional level

The Action Plan for the Production and Promotion of Organic Products in the Autonomous Region of the Azores (2019–2029) aims to develop organic farming across the archipelago. It encourages the conversion of agricultural and aquaculture farms, provides technical support to producers and promotes organic products in local and regional markets. The plan also supports crop diversification, strengthening the organic ecosystem and the promotion of environmentally sustainable practices. Concrete initiatives, such as training programmes, forums and pilot projects, accompany producers during the conversion process.

Romania

The 2023–2030 Organic Action Plan is first Romanian national-scale organic plan. Its primary aim is to achieve 6% of UAA in organic farming by 2030, corresponding to 800,000 ha. The plan is structured around the following axes:

- Supporting production and processing (including investment subsidies)
- Developing the domestic organic market,
- Structuring organic sectors to meet demand,
- Encouraging cooperation among farmers and the creation of producer organisations,
- Promotion and awareness-raising among farmers, consumers and public authorities,
- Better integration of organic farming into national policies,
- Developing research, training and technical advisory services in organic farming,
- Diversification of production and processing, both for the domestic market and for export.

Slovakia

The 2023–2027 Slovak Organic Plan aims to reach 14% of UAA grown organically by 2027[1]. To achieve this goal, it employs several complementary measures:

- Support and structuring of the organic supply chain, from production to marketing, to ensure that increased production finds outlets, both for home and out-of-home consumption,
- Development of advisory services, training and research in organic farming,
- Improvement of organic sector monitoring,
- Strengthening consumer awareness and trust,
- Integrating organic farming into broader measures for rural development, natural resource protection, biodiversity, resilience and climate[2].

1- The first Slovak organic plan ran from 1995 to 2010.

2- In accordance with the 2030 environmental strategy.

Slovenia

- The 2023–2027 Slovenian Organic Plan aims to[1] :
  - Reaching 18% of UAA grown organically by 2027,
  - Achieving at least 10% of farms certified organic by 2025,
  - Promoting the development of organic production and processing to market more Slovenian organic products,
  - Encouraging the consumption of local organic products.

The plan focuses on eight key priority areas:

- Supporting farm conversions to expand organic production,
- Increasing organic processing,
- Developing knowledge transfer, training and organic advisory services,
- Ensuring access to seeds compliant with organic regulations,
- Encouraging organic products introduction in food service,
- Promoting organic farming to consumers,
- Investing in organic farming research and encouraging innovation,
- Ensuring that organic farming contributes to environmental protection, sustainable soil and water management and climate change adaptation and resilience.

Spain

- Spain consists of seventeen autonomous communities, each with its own parliament and government.

At the national level

- There is no national organic action plan.

- Within its strategic plan for the wine sector, Spain plans to achieve 26% organic vineyard coverage by 2027.

In the autonomous communities

- Public support for organic farming is heterogeneous from one autonomous community to another.

- Catalonia appears to be the only autonomous community with a current organic action plan (2024–2027). It aims to promote organic production, encourage conversion, support producers and develop local consumption.

1- This is the second Slovenian organic plan. The first ran from 2005 to 2015.

- In Andalusia:

  - In November 2025 the Andalusian Parliament approved the Andalusian Law for the Promotion of Ecological Production[1], the first regional law of its kind in Spain. It aims to promote organic consumption, especially by giving priority to certified products in public procurement (school canteens, hospitals, etc.). The law also provides for the creation of a regional network of local organic markets to encourage direct or local sales of organic products. It includes measures to support processing, marketing and promotion.

The law provides support for research, innovation, training and knowledge transfer in collaboration with universities and technology centres. It also promotes specific practices, such as the conservation of local livestock breeds in organic farming. The creation of an Andalusian Organic Award is planned to reward farms, businesses, or actors committed to the organic sector. Currently, the law does not have its own budget. The law is not limited to strictly organic farming but also covers other forms of sustainable and certified production (including aquaculture), which has been criticised by organic sector professionals.

  - Currently, there is no comprehensive organic action plan in Andalusia, but several programmes exist, such as the project for the creation of biodistricts and the 52 initiatives to strengthen organic farming (2024–2025), targeting in particular women, young farmers and small and medium-sized farms.

- The absence of a plan in other autonomous communities does not, of course, mean that organic farming is not supported there.

Sweden

- As part of the national food strategy for 2030, a specific organic plan has been established to promote organic farming and food. Its main goals are to reach 30% of UAA grown organically by 2030 and 60% organic food consumption in public Food service. This plan involves several complementary components:

  - Support for organic production,
  - Development of organic value chains,
  - Promotion of organic consumption and encouragement of predominantly organic public procurement,
  - Support for awareness, information, promotion and consumer trust,
  - Integration of organic farming into a broader agricultural, environmental and rural approach.

1- Ley de Impulso y Promoción de la Producción Ecológica

Organic products promotion

- EU countries are implementing promotion and information actions for organic products.

- In some cases, these are full-fledged promotion programmes, sometimes co-financed by the European Commission.

Promotion programmes co-financed by the European Commission

Principles

- Co-financed programmes can be national or multinational. Member States must respond to a call for proposals to request co-financing for their promotion programmes. EU agricultural product promotion campaigns are designed to open new market opportunities for EU farmers and the wider food industry, both within the EU and in third countries.
They aim to raise awareness of EU products, promote sustainable practices and product quality (including organic) and increase consumer demand.

- The European Climate, Infrastructure and Environment Executive Agency (CINEA, formerly CHAFEA) preselects projects, while the European Commission makes the final decision on which programmes to co-finance.

- In 2025, the budget specifically for organic products fell by 31% compared to 2024, dropping from €42 million to €28.8 million. This represented nearly 22% of the EU budget dedicated to the promotion of agricultural products (AGRIP) in 2025. The overall AGRIP budget also decreased by 29% in 2025 compared to 2024, falling to €132 million. This significant reduction is explained by the revision of the multiannual financial framework and the adoption of emergency support for Ukraine, which required the redeployment of certain agricultural funds.

- Winners of the EU promotion fund cannot receive support more than twice consecutively for the same product or system in the same geographic market. Indeed, this fund is not intended to provide structural financing to organisations but to support promotion campaigns with specific, time-limited goals, ensuring rotation of beneficiaries and maximum campaign effectiveness.

- Co-financed campaigns are identified by the "Enjoy, it’s from Europe" logo, which ensures the coherence and visibility of promotion activities at the EU level. This logo must be used on all communication materials, including advertising, promotional materials and on-the-ground activities.

Co-financed organic promotion programmes

Here are some examples of co-financed organic promotion programmes:

- "Towards a more sustainable Europe. Organic is part of the solution" is a multi-country campaign conducted by Finland, Sweden, the Netherlands and Belgium (Flanders). Launched in February 2022 for three years, it is led by four organisations: BioForum, Bionext, Pro Luomu and Organic Sweden.

This campaign aimed to test new promotion methods, raise broad public awareness of organic products, strengthen the recognition of the EU organic label and ultimately boost organic sales. Its total budget across the 4 countries amounted to €4.53 million. The programme included experiments in supermarkets on the placement and presentation of organic products. In Finland, for example, a simple change in store layout led to a dramatic increase (over +250%) in organic carrot sales over a short period.
The campaign also relied on outdoor advertising and social media activities. Additionally, it enabled the four countries to share best practices and strengthen consumer trust in the EU organic label.

■ "Cuisinons plus Bio[1]" is a French programme launched by Agence BIO in 2023, running until early 2026. Its goal is to highlight restaurants and turn them into true ambassadors of organic farming and food[2].

A distinct identity was developed, along with a B2B digital platform[3] offering numerous tools, guidance, best practices and information. A community of partner chefs was also established.
On-the-ground actions are carried out throughout France across all food service channels to raise broad awareness and collectively encourage the shift to organic, targeting both professionals and consumers. The programme also includes interventions in culinary and hospitality schools to educate students about organic products. A print media advertising campaign complemented these efforts.
In 2025, the European Commission approved a co-financing request to continue this programme.

■ "Made in Nature – Discover the Values of European Organic" is an Italian programme launched in 2022 by Centro Servizi Ortofrutticoli and completed in 2025. Its goals were to strengthen knowledge of organic products and improve their perception among the general public and professionals, while boosting consumption and the promotion of Italian organic fruits & vegetables in several EU countries: Italy, France, Germany and Denmark.
The campaign deployed numerous promotional activities: participation in EU trade fairs and professional events, campaigns and content on social media, tastings and in-store activities in Italy and Germany, as well as advertising and press relations.
The total budget for this programme amounted to €2.2 million. Carbon emissions related to the programme activities and communication materials were offset through the planting of fruit trees.

■ "EU Organic – Information and Promotion Measures for Organic Products" is a programme led by the Greek cooperative Bio Net West Hellas, in partnership with the Bulgarian Association of Organic Products. It ran for 36 months starting in July 2022. Its budget exceeded €3 million.

1- i.e., Let's Cook More Organic

2- In France, the European Commission also co-financed a program promoting organic products jointly run by two interprofessional organizations: CNIEL and Interfel.

3- https://cuisinonsplusbio.fr/

The goal was to promote EU organic products in three key international markets: Switzerland, Norway and South Korea.
To achieve this goal, the programme implemented various types of promotional activities, including information campaigns, specialised events and trade fairs, product tastings, as well as targeted actions on social media, in order to reach a wide audience and strengthen awareness of EU organic products.

Non–co-financed organic promotion programmes

Here are some examples of organic promotion programmes not co-financed by the European Commission:

- In Germany, the Federal Ministry of Food and Agriculture launched the "Bio?NaLogo!"[1] campaign at the end of 2023 to raise public awareness of organic products, as part of the National Organic Strategy 2023. The campaign highlighted organic products benefits through social media, events and in-store activities.

- In Bulgaria, the Ministry of Agriculture and Food launched the "Prizvanie: BioLogichen!"[2] campaign in November 2025 to raise public awareness and encourage farmers to switch to organic production. Through regional events, open days and information activities, the campaign highlights the quality of Bulgarian organic products and their positive impact on health and the environment.

- In France, organic promotion currently relies on two major national campaigns, aimed at raising public awareness and supporting the vitality of the organic sector:

  - The "Pour nous et pour la planète, #BioRéflexe"[3] campaign was launched in May 2022 by Agence BIO, through the French Organic Team[4], with the goal of encouraging the Frenchs to make organic products a daily consumption habit. It relies on multichannel communication and has been adopted by partners, including through regional adaptations.

  - "C'est Bio la France"[5] was launched in February 2025 by Agence BIO. It focuses on popularizing organic products and on the idea that organic food is not just an ethical or environmental choice for a minority, but an accessible and desirable option for a wide audience. This campaign is also multichannel and for the first time, a television commercial was aired in 2025.

- In Italy, in September 2023, the Ministry of Agriculture and ISMEA launched the national campaign for organic products, #IOPARLOBIO[6]. The key message, "The health of the planet depends on your spending," invited consumers to support organic farming through their purchasing choices.

1- i.e., "Organic ? Of course !"
2- i.e., "Vocation : Organic"
3- i.e., For Us and for the Planet, #OrganicReflex
4- It is composed of Agence BIO, several agricultural interprofessional organizations (including Cniel, Cnipt, Cnpo, InterApi, Interbev, Intercéréales, Interfel, Synalaf, Terres Univia) and Maison de la Bio.
5- i.e., France is Organic
6- i.e., "I speak Organic."

The campaign was rolled out across multiple channels: a television commercial, a radio spot and a web series featuring producers and local initiatives, aiming to bring the public closer to sustainable practices and to showcase italian organic products.

- The Dutch Ministry of Agriculture, Nature and Food Quality launched a national campaign in 2024 to promote organic products and raise consumer awareness of the benefits of organic food, both for health and the environment.
The campaign emphasises the quality and taste of organic products, using a variety of media: television commercials, online actions and an information platform.

- In Poland, the national campaign "Go Organic" was launched in 2024 by the Polish Chamber of Organic Food. It aims to raise awareness of organic products in Poland and to grow the domestic organic market. Like in other countries, it is multichannel, including television, social media and trade fairs.

- In several countries, organic product promotion campaigns have also been launched by private organisations (for example: Bionext in the Netherlands and Ecovalia in Spain).

Organic weeks and months

- Several countries and regions organise annual campaigns such as Organic Week or Organic Month. This is the case in:

  - Germany: Öko-Aktionswochen in Baden-Württemberg in October, since 2021 and BioWochen in North Rhine-Westphalia in late August–early September, at least since 2020,
  - Belgium: Organic Week in Wallonia in June, since 2005 and Bioweek in Flanders in June, relaunched in 2024.
  - Spain: Semana Bio in September or October, depending on the year, since 2022,
  - France: Printemps Bio, spanning May and June, since 1999,
  - Luxembourg: BIO-Woch, held in September since 2023.

- These organic weeks and months often provide an opportunity for open days at producers' and processors' facilities.

Competitions

This list is not intended to be exhaustive.

At the EU level

- At the EU level, the European Union Organic Awards is a competition that has been organised since 2022. Seven awards are distributed across six different categories. They recognise various actors in the organic value chain who have developed excellent, innovative, sustainable and inspiring projects that create real added value for organic production and consumption. The awards are presented on the European Organic Day, on September, the 23rd.

Germany

- There is a Federal Organic Farming Competition[1], launched in 2000. The three awards are presented during Green Week in January. The Federal Ministry of Food and Agriculture recognises organic farmers who have distinguished themselves through their innovations, initiatives and creativity.

- Several regional organic competitions have also been established in Bavaria, Mecklenburg-Western Pomerania and Thuringia.

- The German organic wine competition, EcoWinner, celebrated its 30th anniversary in 2025. It is organised by Ecovin.

Spain

- The "Alimentos de España" award, presented annually by the Ministry of Agriculture, Fisheries and Food, includes an organic category that recognises the best organic products. This award has existed since 1987.

- For 27 years, Ecovalia and the Núñez de Prado family have awarded prizes recognizing research, advocacy and promotion of organic farming. Agence BIO was among the 2025 laureates.

Estonia

- Since 2010, the Estonian Organic Farming Foundation, in cooperation with the Organic Farming Advisory Board and with the support of the Ministry of Rural Affairs, has been organising a competition recognizing the best organic producer and the best organic product of the year.

Finland

- In 2019, Pro Luomu launched the European Organic Food Innovation Award[2]. Its goal is to promote innovation in organic food at the European level by recognizing products, services or processes that can appeal to the European market and meet consumer expectations.

France

- As part of Millésime Bio, Sud Vin Bio has been organising an organic wine competition since 2007: the Challenge Millésime BIO.

- Created in 2012, the Natexpo Organic Competition annually rewards the most creative and sustainable innovations in organic food. Serving as a true showcase for the organic market, it highlights products that combine quality, originality and environmental commitment.

1- Bundeswettbewerb Ökologischer Landbau (BWÖL)
2- Euroopan Luomuruoka Innovation Award

Italy

The BIOL Award, launched in 1996, annually recognises the best organic olive oils in the world through an international competition. It is organised by CIBI srl[1] and the BIOLITALIA Association. In 2025, 18 countries participated.

Poland

Since 2011, the National Organic Farming Competition[2] has annually recognised the best actors in the organic sector: best organic farm, best advisor, best processor and best participant in the organic farming knowledge test. This competition is organised by the Ministry of Agriculture and agricultural advisory centres.

Czech Republic

Since 1995, PRO-BIO has been organising the annual competition for the Best Czech Organic Food of the Year, recognizing the top organic products and farms while promoting organic farming to the general public.

Sweden

In 2024, KRAV[3] launched the Go Organic Award to showcase innovative organic products. This competition is organised as part of the Nordic Organic Expo.

Organic tours

In France, Agence BIO's Bio Tour was launched in 2024 as an initiative to raise public awareness of organic farming. The specially equipped Bio Bus travels through French cities offering educational activities, workshops, tastings and meetings with producers, allowing the public to discover organic products in a fun and interactive way.
The Bio Tour makes organic farming accessible to everyone, highlights sustainable agricultural practices and strengthens the connection between consumers and producers. Following its success in 2024, the Bio Tour was continued in 2025 and is planned to take place again in 2026.

In Germany, the BioMobil is an innovative project that brings children and teenagers closer to organic farming. This mobile unit travels directly to schools and kindergartens to offer fun and hands-on workshops, including planting, tasting organic products and making compost.
The goal is to raise young people's awareness of healthy eating, environmental protection and sustainable practices.

1- Italian private company specialising in organizing competitions and events related to organic farming.
2- Konkurs na Najlepsze Gospodarstwo Ekologiczne
3- Swedish certification body

Actions with schools

Several countries have implemented specific initiatives to raise children's awareness of organic farming:

- Setting up organic school gardens, for example: Waldorf School in Gödöllő (Hungary) and Primary School 61 in Gdańsk (Poland).
- Visits to organic farms by school groups,
- Development of educational materials for students and teachers, for example: educational kits in France[1] and Flanders, the brochure "Come with Us to the Organic Farm" in North Rhine-Westphalia (Germany) and an organic-themed game for kindergartens in Vienna (Austria),
- Organisation of events or competitions, for example: cooking workshops in Spain[2] and the school contest "Echt kuh-l!" [3] in Germany, held since 2003.

The "Fruits, Vegetables and Milk at School" programme, launched in 2017, aims to instil healthy eating habits in children by providing them each week with high-quality fruits, vegetables, milk and dairy products. It is based on distributing these products in schools, from kindergarten to secondary level, accompanied by educational activities designed to help students develop balanced eating habits and a better understanding of agricultural supply chains.

The programme can also be used to promote organic products, which are seen as a key tool for taste education and the transition to more sustainable diets. This is notably the case in Austria[4], Finland and the Czech Republic.

Research support

The European Union and its Member States support research on organic farming. This research is funded through national programmes, organic farming action plans, as well as European research, innovation and territorial cooperation programmes.

At eh EU level

Framework programmes

The "framework programmes" are the major EU funding programmes for research and innovation. The first was launched in 1984. The most recent are the Horizon programmes:

- Horizon 2020: 8th Framework Programme (2014–2020),
- Horizon Europe: 9th Framework Programme (2021–2027).

1- The first version was produced in 2009. It is due to be updated soon.
2- As part of the Educabio school programme
3- i.e., "Really great !" This programme had a different name before 2012.
4- Nearly 45% of the fruits & vegetables in the programme were organic during the 2023/2024 year.

Horizon Europe funds a wide range of projects in life sciences and agricultural sciences. Its total budget amounts to €95.5 billion for 2021–2027.
Organic farming is not overlooked in this programme. It is included under agroecology, sustainable food systems, biodiversity, climate adaptation and soil management.
Despite the significance of EU funding, the majority of public financing for agricultural research remains managed by the Member States. However, they can choose to pool part of their budgets in transnational cooperation programmes, notably through ERA-NET initiatives.

EU-funded organic farming research projects

The first EU project funding dedicated to organic farming dates back to the mid-1990s.

Examples of European research projects on organic farming funded by the EU

Project name	Period	Goals	Lead partner / coordinator	Funding	Budget (millions €)
Organic Data Network	2012-2024	Create a coordinated European network to improve the collection, harmonisation and transparency of data on the organic products market.	Università Politecnica delle Marche (Italy)	7th Framework Programme	Nearly 2
OK-Net Arable	2015-2018	Sharing practical solutions among European organic farmers through the platform Organic-Farmknowledge.org.	IFOAM Organics Europe	Horizon 2020	2.2
LIVESEED	2017-2021	Increasing the availability of organic seeds adapted to organic farming systems.	IFOAM Organics Europe/FIBL	Horizon 2020	Nearly 9, including a portion from Switzerland.
OK-Net EcoFeed	2018-2021	Expansion of the scope of activities of the Organic-Farmknowledge.org platform.	IFOAM	Horizon 2020	Nearly 2
RELACS	2018-2022	Research and development of alternatives to "contentious" inputs in organic farming and fostering dialogue between science, practice and policy to promote the adoption of identified solutions.	FIBL	Horizon 2020	Nearly 4
Organic-PLUS	2018-2022	Minimisation (or even elimination) of problematic inputs in organic farming. Development of decision-making tools for organic stakeholders and policy recommendations.	Coventry University (UK)	Horizon 2020	4.1
Biofruitnet	2019-2023	Reduction of diseases and pest infestations in organic fruit farming.	Naturland (Germany)	Horizon 2020	Nearly 2
PPilow (Welfare of poultry and pigs in low-input and organic production systems)	2019-2024	Co-develop, through a multi-stakeholder approach, solutions to improve the welfare of poultry and pigs in organic or low-input outdoor production systems. Animal welfare.	INRAE	Horizon 2020	Nearly 10

OH-FINE (Organic Farming Innovations Network Europe)	2024-2028	Creation of a European learning community for organic farmers and development of decision-support tools.	IRNASA-CSIC[1]	Horizon Europe	3.8
OrganicAdviceNetwork	2024-2028	Creation of a pan-European network of 1,000 organic farming advisors. Support for training, knowledge sharing and development of an action plan to ensure the sustainability of this network.	IFOAM Organics Europe	Horizon Europe	Nearly 5
OrganicClimateNET	2024-2028	Establishment of a pilot network of 250 organic farms across twelve countries to co-develop "climate farming" strategies. Production of knowledge resources, a decision-support toolbox and data for climate policy.	FIBL	Horizon Europe and SERI	Nearly 5
OrganicYieldsUP	2024-2028	Increasing the yields of organic cropping systems with a focus on sustainability.	FIBL	Horizon Europe	3.6

Source: European Commission

CORE Organic schemes: A link between Horizon and national funding

- The four CORE Organic initiatives (2004–2022) were funded under the ERA-NET schemes of the Framework Programmes.

- CORE Organic serves as a bridge between European Framework Programmes and national organic research programmes.

- The roles of CORE Organic are to coordinate national research programmes on organic farming, pool Member States' budgets with European co-funding and finance transnational projects focused on organic food and farming systems.

- A total of 62 projects have been funded. The ERA-NETs were coordinated by DARCOF (which has since become ICROFS).

Overview of the 4 CORE Organic initiatives

Project name	Period	Funding	Total budget (EU & MS) (millions €)	Examples of funded projects
CORE Organic I	2004-2007	6th Framework Programme (FP6, ERA-NET)	8.3	- AGTEC-ORG: methods to improve wheat quality in organic farming - ANIPLAN: animal health and welfare planning in organic farms - COREPIG: tool to prevent diseases and parasites in organic pig farms
CORE Organic II	2010-2013	7th Framework Programme (ERA-NET)	14.9	- ProPIG: improving the health, well-being and nutrition of organic pigs

1- Institute of Natural Resources and Agrobiology of Salamanca et Conseil national de la recherche espagnole

				- COBRA: coordination of organic plant breeding activities for diversity - HEALTHY GROWTH: moving from niche to volume with integrity and confidence in organic food systems
Core Organic Plus	2013-2018	ERA-NET Plus (FP7)	11	- 2-ORG-COWS: preventive health management of dual-use (milk and meat) cows in organic grazing systems - EcoOrchard: innovative design and management to promote functional biodiversity in organic orchards-FertilCrop: management measures to build soil fertility in organic farming systems
Core Organic Cofund	2016-2022	Horizon 2020 (ERA-NET Cofund)	17.9	- BIOVINE: creating diversified vineyards with reduced input needs - FreeBirds: improving chicken health and addressing environmental issues in free-range production - POWER: strengthening welfare and resilience in organic pig production

Source: European Commission

Interreg and LIFE: initiatives complementary to the framework programmes

In addition to Horizon Europe and ERA-NET, two other EU programmes contribute to the development of organic farming:

- Interreg is a European territorial cooperation programme. It funds regional or cross-border projects, particularly on sustainable resource management, rural innovation, the resilience of agricultural systems and agroecological approaches tested at the regional level.
Although not specifically dedicated to organic farming, Interreg supports initiatives directly relevant to organic systems, such as functional biodiversity, soil management, short supply chains and climate adaptation.

- LIFE is a programme dedicated to the environment, climate and biodiversity. It supports pilot or demonstration projects, often very close to the field.
Organic farming is not an explicit goal, but many LIFE projects support the reduction of inputs, biodiversity in agroecosystems, farming practices with high ecological value and the protection of soil and water.

- Thus, the Framework Programmes provide the scientific impetus, CORE Organic coordinates national efforts and Interreg and LIFE disseminate, test and apply innovations in the field.

TP Organics

- In 2007, IFOAM Organics Europe, together with ISOFAR, launched TP Organics, the European platform dedicated to research in organic farming and food. It was officially recognised by the European Commission in 2008. This platform identifies the needs of the sector and farmers, communicates priorities to policymakers, provides

information on funding and promotes knowledge sharing among sector stakeholders. Its mission is to promote organic and agroecological approaches to build sustainable and resilient food systems, by developing programmes and roadmaps at the EU and national levels to guide European Union investments.

- Since 2015, TP Organics has organised an annual Science Day at Biofach to share research results and define future research priorities.

- It also organises the annual Organic Innovation Days, usually held in Brussels, which are aimed at a broader audience than the Science Day.

Organic farming research in the Member States

- In some countries, organic farming is integrated into the research programmes of various institutes and universities, as is the case in Germany, Greece and Sweden. In other countries, there are specialised research structures that coordinate all studies on organic farming, such as ÖMKI in Hungary.

- Most countries do not report their annual national budget for organic farming research. Here are the few available figures: around €17 million in Germany, €7.4 million in Denmark in 2025 and €2.65 million in Flanders (Belgium) in 2024.

Austria

- The Ministry of Agriculture funds and manages the Bio-Aktionsprogramm 2023+, which places research and innovation at the heart of the development of the organic sector. The programme aims to strengthen organic knowledge systems and promote coordination between research, advisory services, education and farming practice.
Within this framework, the Bio Forschungsnetzwerk[1] structures Austrian organic research by connecting universities, institutes, technical centres and farmers, facilitating scientific results sharing and knowledge transfer to practice. FiBL Austria plays a central role in this network, coordinating applied research activities, supporting advisory services for farmers and contributing to the dissemination of practical guides and recommendations.
Thus, the Ministry sets priorities and funds research, while the network and FiBL ensure coordination, implementation and the transfer of knowledge to the field.

- Research in organic farming is carried out by various public and private organisations:

  - BOKU, the University of Natural Resources and Life Sciences in Vienna[2], includes a Department of Agricultural and Biological Sciences that conducts research on organic production, optimisation of organic cultivation techniques, sustainable soil management and adaptation to climate change,
  - The Österreichisches Forschungsinstitut für Biolandbau[3] (OFI), often referred to as Bio Forschung Austria, is the main Austrian research institute specialising in organic farming. It is a non-university, non-profit institution managed by the

1- Organic research network
2- Universität für Bodenkultur Wien
3- Austrian Institute of Organic Farming Research

association of the same name. Founded in 1979 as the Ludwig Boltzmann Institute for Organic Agriculture and Applied Ecology, OFI conducts studies on soil fertility, biodiversity, varieties suited to organic farming and sustainable plant protection. It works closely with farmers and universities to apply its findings in the field, playing a key role in transferring scientific results into practice,

- HBLFA Raumberg-Gumpenstein is an agricultural research and teaching centre under the supervision of the Austrian Ministry of Agriculture. Its institute dedicated to organic farming conducts experiments on crops, livestock and biodiversity, while also contributing to farmer training and advisory services,
- The Austrian Institute of Technology (AIT) conducts applied research projects on sustainability, energy efficiency and agricultural technologies, as well as their adaptation to organic farming,
- The Chambers of Agriculture conduct practical trials and experiments to test and optimise local organic practices, in collaboration with farmers and research institutes.

Belgium

In Flanders, research on organic farming is carried out by public institutions, universities and technical centres. Among the main actors are ILVO (Flanders Research Institute for Agriculture, Fisheries and Food) and the agricultural department of Ghent University (UGent). These organisations conduct studies on soil fertility, crop rotations, integrated crop protection and organic practices optimisation. The CCBT (Coordination Centre for Research and Information on Organic Agriculture) plays a central role by coordinating applied research and ensuring the dissemination of scientific results to organic farmers, thereby contributing to knowledge transfer between research and practice.

In Wallonia, research in organic farming is carried out by several organisations. CARAH (Centre for Application and Research in Hainaut) is a non-profit organisation that conducts applied research, training and scientific expertise, including projects in organic farming. It conducts field experiments and provides technical support to organic sector professionals.
The Walloon Agricultural Research Centre (CRA-W), through its Cross-cutting Unit for Research in Organic Production, plays a central role in coordinating organic research, conducting specific studies and transferring scientific results to producers.
The University of Liège (ULiège) conducts research on organic cropping systems, soil fertility and plant protection.

Bulgaria

The National Agricultural University of Plovdiv in Bulgaria has been a pioneer[1] and makes a significant contribution to the development of Bulgarian organic agriculture. A group of its professors even founded the first association dedicated to organic agriculture in the country.
It plays a particularly active role in organic farming research: it combines training, agronomic demonstrations (with an organic farm), varietal selection, biological pest control, climate change adaptation, bioeconomy and sustainable practices. Since

1- It has been working on organic farming since the late 1980s.

1989, the University has also a centre specialising in research and training in organic farming, agroecology and environmental protection.

- Founded in 1961, the Academy of Agriculture plays an important role in research on organic farming, especially through its Maritsa Institute of Vegetable Crops, based in Plovdiv[1].
It carries out projects aimed at improving soil quality, biodiversity and the sustainability of agroecosystems. Some specialised units provide training, advice and practical demonstrations for organic farmers. The Maritsa Institute develops varieties suited to organic agriculture and tests organic fertilisers.

Croatia

- The Croatian Agency for Agriculture and Food (HAPIH) conducts applied research in sustainable agriculture and collaborates with scientific institutions to promote innovation in the organic sector.

- The University of Zagreb works on sustainable soil management in organic agriculture, studying organic fertilisation techniques and soil conservation practices. It also develops methods to improve productivity while preserving biodiversity.

- Several institutes are also active in research on organic agriculture: IRES, the BC Institute of Zagreb, the Institute of Agriculture and Tourism in Poreč, the Institute for Adriatic Culture in Spli and the Agricultural Institute in Osijek. They develop projects aimed at improving farming practices, soil quality and the sustainable management of resources. Their work includes the evaluation of suitable crop varieties, the use of organic fertilisers and the promotion of agroecological methods.

Cyprus

- The Agricultural Research Institute conducts research on various aspects of agriculture, including organic farming, in order to develop sustainable agricultural practices adapted to local conditions.

- The University of Cyprus conducts research on organic agriculture, studying sustainable cropping systems, soil protection and resource management. It also provides training and advisory services to producers wishing to adopt organic practices.

- The current organic plan incorporates pilot projects and applied research initiatives to improve agronomic practices, soil fertility, integrated pest management and climate change adaptation.

Czech Republic

- Bioinstitut is a research and training institute dedicated to organic agriculture and sustainable landscape management, established in 2004. It conducts applied research, provides training and offers advisory services. It also coordinates the Czech Technology Platform for Organic Farming (CTPEZ), founded in 2009, which aims to

1- It is independent of the university.

support the development of a knowledge system and the transfer of expertise across all sectors of organic agriculture and organic food production.

- The Prague Agricultural Research Institute (ÚKZÚZ) and several Czech agronomic universities—including the Czech University of Life Sciences Prague, Mendel University Brno, University of South Bohemia and Palacký University Olomouc—participate in organic agriculture research projects focusing on soil fertility, biodiversity and integrated crop protection.
The Agricultural Economics Research Institute (UZEI), meanwhile, conducts economic research in the field of organic agriculture.

Denmark

- ICROFS is the International Centre for Research on Organic Food Systems. It was established in 2008, taking over the missions of DARCOF, which had been created in 1996. It is financially supported by the Ministry of Food, Agriculture and Fisheries.
ICROFS contributes to the development of a competitive, market-oriented organic sector, thereby supporting the continuous growth of Danish organic industry. It collaborates with various research organisations, although it is not always the project leader.
It plays a role in the national research programme[1] Organic Research, Development and Demonstration Programme[2], which covers a wide range of studies, from production methods to economic analyses (e.g., consumer surveys). ICROFS also participates in international programmes, notably serving as a coordinator in some cases.

- In 2021, Landbrug & Fødevarer and Økologisk Landsforening established the Innovation Centre for Organic Agriculture ("Innovationscentre for Økologisk Landbrug") to advance organic practices, notably through the development of organic seeds and the diversification of farming systems (legumes, agroforestry). The centre collaborates with researchers from Aarhus University and University of Copenhagen, as well as with ICROFS.
It occupies a central role in the experimentation, evaluation and dissemination of solutions aligned with climate goals and organic principles. Through the Danish Organic On-farm Living Lab, it conducts on-farm trials to reduce the carbon footprint of organic production and contribute to climate neutrality by 2050. Its work focuses on soil fertility (legumes, green manures, complex crop rotations), reducing reliance on manure, lowering emissions—particularly N_2O—and developing systems more resilient to climate change.
The centre also engages in organic livestock farming, developing models that promote animal welfare, herd health and environmental performance.
It produces data, guides and practical tools to support farmers, thereby facilitating a coherent climate and agronomic transition for Danish organic sector.

- Two Danish universities are active in organic agriculture research: Aarhus University (notably in organic livestock farming) and the Faculty of Science at University of Copenhagen (agronomy).

1- The first national research program on organic farming was launched in 1996.

2- Launched in 2025.

Estonia

- The Estonian University of Life Sciences (EMÜ) is the country's main centre for agricultural research and education. Its Organic Agriculture Research Centre, established in 2008, conducts applied work on soil fertility, organic cropping systems, organic livestock farming and the development of sustainable value chains.

- The Polli Horticultural Research Centre, affiliated with EMÜ, focuses on organic and sustainable horticultural production, developing innovative and environmentally friendly cultivation techniques.

- The Estonian Agricultural Research Centre (METK), established in 2023 through the merger of two agricultural institutes, complements this framework by conducting trials on soils, crops, biodiversity, the efficiency of farming practices and plant protection. It also plays a key role in transferring knowledge to farmers.

- Maheklaster (Organic Cluster) serves as a link between organic producers, universities and research centres, coordinating experimental projects and supporting the overall development of organic agriculture in Estonia.

Finland

- The Natural Resources Institute Finland (Luke) is the country's main public research institute for agriculture and food. It conducts a research programme on organic agriculture, covering agronomy, livestock and sectoral economics.

- The Finnish Organic Research Institute (FORI) at the University of Helsinki is a multidisciplinary network, in partnership with Luke, studying organic production, the environment, food and the social and economic aspects of organic agriculture.

In its report "Research Priorities in the Finnish Organic Food and Agriculture Sector 2025–2030" FORI outlines the main scientific directions for developing Finish organic sector by 2030, aiming to increase production, consumption and exports. The priorities focus on crop resilience and diversification, profitability and welfare in livestock farming, reduction of environmental impacts and emissions, improvement of animal feed and the development of economic data. The report also emphasises the importance of strengthening European cooperation.

- The University of Helsinki conducts various research projects on organic agriculture, covering technical, environmental and economic aspects.

France

- ITAB, the Technical Institute for Organic Agriculture (ITAB), coordinates research in the organic sector. It was established in 1982.
It also conducts research and experimental work, especially on soil fertility, crop protection, animal feed and biodiversity.

- INRAE, the country's main agricultural research institute, has launched a meta-programme on scaling up organic agriculture: Metabio. This programme aims to study the challenges, levers and consequences of such a transition, with the goal of gathering scientific communities and providing evidence-based solutions to anticipate impacts and support this scaling-up process. The implementation of this cross-cutting programme is intended to broaden the scientific community working for and on organic agriculture.

- The GRAB Avignon is a research organisation specialising in organic agriculture, established in 1979. It supports farmers by testing sustainable and environmentally friendly practices. Its work focuses on soil fertility, biodiversity and integrated crop management.

- Chambers of Agriculture play a key role in applied research in organic farming. They experiment with new cropping practices and assess their impact on yields, soil quality and biodiversity.

- Agricultural technical institutes, such as CTIFL[1] and Arvalis – Institut du Végétal, also play an important role in applied research in organic farming. Their main mission is to develop and test techniques adapted to organic practices in order to improve productivity while respecting the environment.

- Several universities and engineering schools also conduct research on organic farming, including AgroParisTech, Montpellier University, Rennes University, Bordeaux University and the National Polytechnic Institute of Toulouse. They develop projects on organic cropping systems, soil fertility, plant protection, organic livestock and food quality. These institutions collaborate with technical institutes such as ITAB, research centres and farms to test and disseminate sustainable and innovative practices.

Germany

- The federal organic farming programme (BÖL) coordinates and funds research projects in organic farming with financial support from the Federal Ministry of Agriculture. Since its launch, it has funded 930 projects. Of these funds, 41% have been dedicated to crop production and soil management, 18% to livestock and 10% to food processing.

- The German Länder can also contribute to the funding of research in organic farming[2].

- Several applied research networks exist at regional or thematic levels, connecting farmers, researchers and advisors. Among them, the Praxisforschungsnetzwerk Hessen is a notable example.

1- Interprofessional Technical Centre for Fruits and Vegetables

2- This is notably the case in Bavaria.

Research in organic farming is organised around various public and private institutions:

- FiBL Germany focuses particularly on ecological soil management and organic production systems optimisation. It also publishes practical guides for organic farmers,
- Several German universities conduct research in organic agriculture[1], especially University of Hohenheim, University of Kassel, University of Giessen, University of Göttingen and the Technical University of Munich (TUM),
- The Max Rubner-Institut (MRI) is the Federal Research Institute for Nutrition and Food. Its work focuses on the quality and safety of organic products, their nutritional value and the impacts of organic farming practices on health and the environment,
- Chambers of Agriculture participate in applied research on organic farming by conducting field trials and testing new crop varieties and cultivation practices,
- The Thünen Institute is a federal research centre specialising in agriculture, forestry and natural resources. It studies sustainable solutions for food production, soil management and climate. Its work combines economic, ecological and social sciences to inform public policy and it also includes the organic sector,
- The Leibniz Institute for Agricultural Development in Transition Economies (IAMO) analyses the technical, economic and policy aspects of sustainable agriculture, including organic farming. It studies the organic market and the socio-economic impacts of conversion to organic farming.

Greece

The agricultural and agri-food research institutes ELGO-DEMETER play a central role in agricultural research in Greece, developing innovations for more sustainable production. They carry out projects dedicated to organic farming, focusing on soil protection and input reduction. They also support farmers in adopting environmentally friendly practices.

The Agricultural University of Athens is involved in organic agriculture research. It conducts studies on sustainable practices, soil management, biodiversity and yield improvement while respecting the environment.

Hungary

The ÖMKI – Hungarian Research Institute of Organic Agriculture, established in 2011, promotes organic development in Hungary. This non-profit organisation coordinates research, strengthens the credibility and competitiveness of organic farming, provides reliable information and fosters dialogue within the sector. The institute conducts work on crop varieties, viticulture and soil health, relying on a network of organic or transitioning farms to carry out trials, monitoring and experiments. ÖMKI also participates in European projects and provides advisory services to organic farmers.

1- Basic and applied research on soils, crops, organic livestock and agricultural economics.

- Two universities are involved in organic agriculture research: University of Debrecen and the Hungarian University of Agriculture and Life Sciences (MATE). Their organic farming research focuses on crop and livestock production, soil health, biodiversity, crop protection using natural methods, as well as product quality and the sustainable development of farming systems.

Ireland

- Teagasc is the Irish authority for the development of agriculture and food. It was established in 1988 and conducts applied and basic scientific research in the fields of agriculture, food and the environment. It has a unit specialised in supporting organic farmers. It works in partnership with the Ministry of Agriculture on training, innovation and knowledge dissemination.

- Some universities, such as those in Dublin and Cork, also conduct research in organic farming.

Italy

- There is a Fund for the Development of Organic Production[1], financed by the Ministry of Agriculture. From 2026, this fund will be programmed over several years, with 40%[2] of its resources dedicated to research and innovation programmes, including university-level training.

- The RIRAB[3] is the Italian research network for organic farming, established in 2009. This scientific association brings together universities, research organisations and public institutions, promoting collaboration and knowledge sharing in the organic sector.

- The CREA[4], the main agricultural research institute, was established in 2015. It develops specific programmes on organic farming, focusing in particular on soil health, crops and livestock.

- Several universities conduct research on organic farming, including the universities of Florence, Milan and Padua, the Polytechnic University of Marche and the Catholic University of the Sacred Heart.

- The FIRAB[5], an organic foundation specialised in participatory research and farmer-led innovation, was established in 2008. It coordinates and implements national research projects funded by public resources, including the Ministry of Agriculture, focusing on the genetic diversity of organic crops, the management of agricultural biodiversity and soils.

1- Fondo per lo sviluppo della produzione biologica

2- Other programs supported by the Funds include the national seeds plan, the Italian organic label and the organic action plan.

3- Rete Italiana per la Ricerca in Agricoltura Biologica

4- Consiglio per la Ricerca in Agricoltura e l'Analisi dell'Economia Agraria

5- Fondazione Italiana per la Ricerca in Agricoltura Biologica

Latvia

- The Latvia University of Life Sciences and Technologies (LLU) is the country's main higher education institution in agriculture. It conducts research programmes on organic farming.
Under its supervision, the Agricultural Resources and Economics Institute (AREI) focuses on crop variety improvement in organic agriculture, the development of innovative techniques for crop and legume management and pest control without chemical pesticides.

- The Latvian Institute of Organic Agriculture[1] conducts applied research, tests crop varieties and disseminates best practices for the organic sector.

- Other specialised institutes also play a role in organic agriculture research: the Latvian Horticultural Institute (LatHort), the Plant Protection Research Institute (Agrihorts) and the Baltic Studies Centre (BSC).

Lithuania

- Founded in 2010, the Lithuanian Research Centre for Agriculture and Forestry (LRCAF) conducts research on soil fertility, biodiversity and sustainable cropping systems, including experiments in organic agriculture. It develops crop varieties suited to low-input systems and integrated crop management practices, contributing to agricultural sustainability. The centre also provides advisory services to farmers.

- Vytautas Magnus University conducts studies on soils and crop rotations adapted to organic farming. The Lithuanian University of Health Sciences (LSMU) focuses on animal biodiversity, organic production and animal health. The Aleksandras Stulginskis University (ASU) also carries out experiments in organic crop and livestock production.

- The Lithuanian Bioeconomy HUB, launched in 2024, plays a strategic and coordinating role in the development of the bioeconomy in Lithuania. It facilitates research and innovation, including in organic farming, by connecting universities, research centres and industry actors. Rather than conducting experiments itself, it guides and supports projects, promoting knowledge sharing and networking.

- The Chamber of Agriculture of the Republic of Lithuania supports organic farming research more indirectly by collecting and disseminating information about the organic sector and participating in national and European studies.

- The Lithuanian Research Centre for Agriculture and Forestry (LAMMC) conducts research on the sustainable management of land, forests and environmental resources. It develops innovative technologies and products, particularly in the field of organic farming.

1- Latvijas Lauksaimniecības universitātes Agroekoloģijas institūts

Luxembourg

- PAN-BIO 2025 places research and innovation at the heart of organic farming development. It funds trials, experiments and innovation projects to adapt practices to local contexts and stimulate the sector. The plan also supports new value chains, such as durum wheat processed locally into pasta, as well as projects on sustainability: soil health and fertility, biodiversity, carbon footprint and environmental impacts. Research also addresses the economic, social and ecological aspects of farms to ensure the sector's viability. To support this dynamic, PAN-BIO regularly issues thematic calls for proposals, engaging scientific, technical and professional actors around agricultural innovation.

- The Institute of Organic Agriculture and Agroecology (IBLA) is the country's main centre of expertise for research and advisory services in organic farming and agroecology. Its work focuses in particular on the sustainability of agricultural systems (soils, biodiversity, crop rotations, legumes), the study and selection of varieties suited to organic farming (potatoes, cereals, etc.) and the economic, ecological and social assessment of organic farming.
Alongside its research activities, IBLA offers a wide range of advisory services, organises seminars and field visits and regularly publishes brochures to facilitate the transfer of knowledge to farmers.

- The Public Research Centre – Gabriel Lippmann (CRPGL) also contributes to the development of organic farming through projects focused on environmental sciences, soil analysis and agronomic innovation.

Malta

- Although Malta does not have programmes specifically dedicated to organic farming, several initiatives led by MCAST[1] and AgriHub[2] directly contribute to the development of practices compatible with organic agriculture.

The Netherlands

- Bioconnect is the Dutch network for coordinating research in organic agriculture. It serves as an interface between organic farmers and research and helps define the research programme.

- Wageningen University & Research (WUR) is a world-leading institution in research and education on organic agriculture. Its work in organic farming focuses on sustainability, soil fertility and health, crop protection and the integration of livestock and crops to develop resilient and eco-friendly farms.

1- Malta College of Arts, Science and Technology
2- Agricultural Research and Innovation Hub

The Louis Bolk Institute is an independent research institute specialising in sustainable and organic agriculture, agroecology, crop and livestock production, biodiversity and soil health. Its recent research themes include breeding and selection of plant varieties adapted to organic farming (potatoes, cereals, vegetables), development of cereal–legume mixed systems, agroforestry, biodiversity, livestock systems promoting animal welfare, low-input farming systems and the study of alternative plant- and protein-based value chains.

Poland

The Polish Ministry of Agriculture provides grants to research institutes for projects on organic farming. Funded areas include crop production, livestock, plant protection and the marketing of organic products.

Established in 1962, the National Institute of Agricultural Research[1] (IUNG) is Poland's main national agronomic research centre and operates under the Ministry of Agriculture. It has conducted research on organic farming for many years, especially on crop varieties adapted to organic farming.

The Warsaw University of Life Sciences conducts research on organic farming, covering crop production, crop protection, livestock, product quality, as well as socio-economic aspects and organic market dynamics.
The University of Warmia and Mazury focuses particularly on optimising organic forage production.

Portugal

The National Institute for Agricultural and Veterinary Research[2] (INIAV) conducts applied research on organic agriculture and operates under the Ministry of Agriculture. Its work focuses on improving soil fertility, valorising agricultural by-products, reducing emissions and testing organic practices in the field. The institute also participates in national and European projects to support the development and competitiveness of the organic sector.

Several universities are involved in organic agriculture research, in particular, University of Lisbon, University of Madeira and the Polytechnic Institute of Viseu.

Romania

Adapting research to organic farming needs is one of the goals of Romania's organic action plan.

1- Instytut Uprawy Nawożenia i Gleboznawstwa
2- Instituto Nacional de Investigação Agrária e Veterinária

- Several research institutes conduct activities related to organic agriculture, although the intensity and type of research vary across institutions:
  - National Research–Development Institute for Soil Science, Agrochemistry and Environmental Protection (ICPA): research on soils, fertility and environmental protection,
  - National Research–Development Institute for Agriculture and Food (INCDA): specialised in field crops.
  - Horticultural research institutes (Bacău, Pitești, Vidra and Buzău),
  - Research and Development Institute for Plant Protection,
  - National Research–Development Institute for Food Bioresources (Bucharest): research on the quality and safety of organic food products.

- Several Romanian universities also conduct research on organic farming: University of Agronomic Sciences and Veterinary Medicine of Bucharest (USAMV București) (biodiversity, soil health and product quality improvement), Ion Ionescu de la Brad University (agronomy and environment), King Michael I University (sustainable farming systems) and University of Agronomic Sciences and Veterinary Medicine of Cluj-Napoca (organic crop production and valorisation, environmental protection and techno-economic analyses).

Slovakia

- The National Agricultural and Agri-Food Centre (NPPC), operating under the Ministry of Agriculture and Rural Development, dedicates part of its activities to organic agriculture. Its research topics include organic crop and livestock production, soil and biodiversity protection and technological innovation for sustainable farming systems.

- The Slovak University of Agriculture[1], located in Nitra, is the country's main agricultural university. Within the university, the Research Centre for Agriculture and Bioeconomy (RCAB) develops scientific projects on sustainable agriculture, the economics of organic farming and agricultural innovation.

- Other universities, such as Comenius University Bratislava, participate in interdisciplinary projects on sustainable agriculture and biodiversity.

Slovenia

- In June 2025, a four-year KEKS (Knowledge Exchange & Kreative Solutions) project was launched to bring together a large consortium[2] of universities, research institutes, organic farms, NGOs and organic cooperatives, aiming to generate knowledge and drive innovation in organic agriculture. The project is funded under the 2023–2027 Common Agricultural Policy (CAP).

- The Kmetijski inštitut Slovenije (Agricultural Institute of Slovenia) is the country's main public agricultural research centre. Its work includes areas such as ecological farming, organic fertilisation and sustainable production systems.

1- Slovenská poľnohospodárska univerzita

2- Consortium KEKS / IRP38

- The University of Ljubljana conducts research projects in sustainable agriculture and agronomy, including aspects related to organic systems.

- The Faculty of Agriculture and Life Sciences at the University of Maribor also conducts research on organic farming, soil management and the optimisation of sustainable cultivation practices.

- ISD (Institute for Sustainable Development[1]) works on integrating sustainable and organic farming practices into rural development, combining technical research with economic analysis.

- ITR (Institute for Rural Transformation), a research NGO, focuses its work on organic farming, the transition to sustainable systems, the development of agricultural policies and training farmers in organic practices.

- Educational centres such as the Biotechnical Centre Naklo contribute to practical education and applied research in organic farming, training future farmers and technicians in sustainable methods.

Spain

- Since 1992, the Spanish Society of Organic Farming and Agroecology (SEAE) has been promoting sustainable and environmentally friendly agriculture. It gathers researchers, farmers, educators and consumers committed to agroecological practices, disseminates knowledge on high-quality food production, coordinates scientific projects at both national and European levels and participates in public education and awareness initiatives.

- The National Institute for Agricultural and Food Research and Technology (INIA-CSIC) plays a central role in organic farming research. It develops innovative projects to improve the sustainability of agricultural systems and the quality of food products.

- Several regional technical centres conduct research on organic farming, especially IRTA in Catalonia and the Misión Biológica de Galicia. They develop innovative solutions to improve the productivity and sustainability of organic farms. These centres collaborate with farmers, universities and European organisations and they participate in training programmes and knowledge transfer initiatives to farmers.

- Several universities are also involved in organic farming research, including those in Barcelona, Córdoba, Valencia and the Polytechnic University of Madrid. They work on sustainable production systems, the quality and safety of organic products, crop protection using natural methods, soil management and innovation. They also study the economics of organic sectors and train students and farmers in sustainable practices.

Sweden

- The EPOK Centre (SLU Centre for Organic Food & Farming), affiliated with the Swedish University of Agricultural Sciences (SLU), plays a central role in organic

1- Inštitut za trajnostni razvoj

farming research in Sweden. It coordinates projects, develops research programmes and serves as a platform for exchange among researchers, farmers, funding institutions and policymakers. In 2022, EPOK developed a national research agenda for organic farming in consultation with sector stakeholders (farmers, NGOs, institutions), thereby guiding the country's research priorities.

- The Sustainable Cropping Systems department at SLU studies cropping systems from an agroecological perspective, comparing diversified crops, soil management, weed control, soil microbiology and fertility. This unit has an experimental station with both conventional and organic plots, allowing for comparisons and practical trials.

- Other universities also participate in organic farming research, including those of Lund, Gothenburg and Stockholm.

- The Foundation of the Biodynamic Research Institute[1], as its name suggests, conducts research on biodynamics.

Knowledge transfer

- The dissemination of knowledge between research and advisors, trainers and farmers is essential for the development of the organic sector.

- In 2002, an international database was created under the auspices of ICROFS: Organic Eprints. Its goal was to improve mutual communication, make research results accessible to professionals and the general public and promote knowledge sharing. It is the largest open-access international archive dedicated to organic farming research. By 2023, it already contained over 35,000 publications from around the world. The documents are viewed by an average of about 100,000 visitors per month, with over 130,000 downloads monthly.

- Organic Eprints is also the underlying database for the Organic Farm Knowledge platform[2], which has been providing resources to organic farming stakeholders since 2016. Many new tools were added in 2023 and new languages have been implemented (currently sixteen languages are available). At present, over 800 documents from 22 EU-funded projects are freely accessible.
According to statistics from April 2024, the platform had 20,000 users, including 28% organic farmers, 14% advisors, 9% conventional farmers and 6% farmers converting to organic farming.

1- Stiftelsen Biodynamiska Forskningsinstitutet
2- www.organic-farmknowledge.org

Non-exhaustive list of organisations responsible for knowledge dissemination on organic farming by country

Country	Organisations
Germany	BÖL/ÖLAF
Austria	Bio Forschungsnetzwerk, Bio Forschung Austria and BIO AUSTRIA
Belgium	CRAB and CCBT
Bulgaria	Bioselena
Cyprus	Agricultural Research Institute
Croatia	Ministry of Agriculture
Denmark	Innovationscentre for Økologisk Landbrug
Spain	SEAE
Estonia	METK and Mahepõllumajanduse Kompetentsikeskus
Finland	Pro Luomu
France	ITAB, Agence BIO, FNAB/GRAB, Chambers of Agriculture, Interbio regionals and CIVAM
Greece	ELGO-DIMITRA
Hungary	ÖMKI
Ireland	Teagasc and Irish Organic Association
Italy	RIRAB and Rete Rurale Nazionale
Latvia	Latvian Rural Consultation and Education Centre
Lithuania	Lithuanian Bioeconomy HUB
Luxembourg	IBLA and Chambers of Agriculture
Malta	Ministry of Agriculture
The Netherlands	BioKennis and Louis Bolk Institute
Poland	EKO ZBOZE
Portugal	AGROBIO
Czech Republic	Bioinstitut via CTPEZ
Romania	Inter-Bio
Slovakia	NPPC
Slovenia	Ministry of Agriculture
Sweden	EPOK and Jordbruksverket

Source: Agence BIO

Open days, field days and organic demonstration farms

■ Technical demonstration days have long been organised in France (Tech & Bio), Germany and Austria. They can be national or local[1].

■ Networks of organic demonstration farms have been established in most EU countries. These networks serve both to showcase best practices and to monitor key financial and environmental indicators.
In Germany, the demonstration farm network includes around 300 organic farms.
In France, there are several pilot farm networks, including INOSYS, DEPHY, agricultural high schools, INRAE, etc.

1- Example: Organic Days in Saxony (Germany)

In 2025, the German Federal Ministry of Agriculture launched a practical network for organic processing. It includes around sixty companies and aims to highlight the important role of manufacturers and artisanal businesses within the food value chain.

Open days can also be organised at organic farms and processing facilities, as is the case during Le Printemps Bio in France and the Organic Adventure Days[1] in Bavaria, Germany.

Organic farming training

Numerous organic farming training programmes are available across the European Union.

Organic farmer training and support for organic training

European countries are increasingly supporting the integration of organic farming into public education. In Belgium, this has been the case since the late 1980s. Governments often provide financial support to develop or improve educational materials on organic farming in secondary schools and high schools[2].
Agricultural high school farms can also be organic, as is the case for some in Austria and France.

In France, the Formabio network was created in 2014 by the Ministry of Agriculture as part of the "Teaching to Produce Differently" Plan. Its mission is to promote the integration of organic farming into agricultural education by supporting institutions, providing educational resources and encouraging exchanges between trainers and organic professionals. Formabio particularly supports the development of organic-oriented training, organic production within educational farms and innovation and experimentation projects with local partners.

In some countries, the state provides financial support for training programmes for organic farmers, such as the training offered by CRABE in Wallonia.

Selected organisations offering courses or comprehensive training in organic farming for current and future farmers

Country	Organisations
Germany	Agricultural Technical Schools and BÖL
Austria	Agricultural High Schools
Belgium	Landwijzer vzw and CRABE[3]
Bulgaria	Bioselena
Denmark	Agricultural High Schools and AMU[4]
Spain	SEAE and local vocational training programmes
Estonia	Agricultural Technical Schools
Finland	Vocational Training and Advisory Centres

1- Established in 2000
2- This is the case, for example, in Austria, Estonia, Germany and Spain.
3- Since 1984
4- Arbejdsmarkedsuddannelser. These are professional training courses for adults.

France	Agricultural High Schools
Hungary	Biokontroll Hungária Nonprofit Kht. And ÖMKI
Ireland	National Organic Training Skillnet
Italy	Local Vocational Training Programmes
Latvia	Agricultural Technical Schools
Luxembourg	Agricultural High Schools
The Netherlands	Agricultural High Schools, NAC and Continuing Education Centres
Poland	Centrum Doradztwa Rolniczego w Brwinowie (CDR)[1]
Portugal	Agricultural Associations
Czech Republic	Farmářská škola and Bioinstitut
Romania	Agenția Națională de Consultanță Agricolă (ANCA)[2]
Slovakia	Local Agricultural Training Centres and UKSUP
Slovenia	Naklo Biotechnical Centre, ISD and ITR
Sweden	Local Agricultural Training Centres

Source: Agence BIO

Organic farming education in higher education

- organic farming at university can either be integrated into a broader agricultural programme or offered as a specialised course of study.

- The main universities and prestigious graduate schools offering courses on organic farming, or even full organic programmes, are the following:

Country	University or School
Germany	Hohenheim University and Kassel-Witzenhausen University[3]
Austria[4]	University of Natural Resources and Life Sciences
Belgium	Catholic University of Louvain, Free University of Brussels, Haute École of the Province of Namur
Bulgaria	Agricultural University of Plovdiv
Croatia	Zagreb University, Josip Juraj Strossmayer University (Osijek), University Zadar, Slavonski Brod College and Križevci College
Denmark	Aarhus University
Spain	Córdoba University, Barcelona University and Polytechnic University of Valencia
Estonia	University of Life Sciences
Finland	Häme University of Applied Sciences (HAMK)
France	Clermont Auvergne University, ISARA, Institut Agro Rennes-Angers, Institut Agro Montpellier and ESA (Higher Technical Certificate)
Greece	Agricultural University of Athens
Hungary	University of Debrecen and Hungarian University of Agriculture and Life Sciences (MATE)
Ireland	South East Technological University (SETU), Shannon Technological University (TUS) and Dundalk Institute of Technology (DkIT)

1- Training for farmers and agricultural advisors, especially on topics related to organic farming.
2- National Agricultural Advisory Agency
3- In 1981, the University of Kassel became the first in Germany to establish an organic farming professorship.
4- In Austria, almost all agricultural universities offer organic farming options.

Italy	Bologna University, Florence University, Modena University, Naples University and Polytechnic University of Marche
Latvia	Latvia University of Life Sciences and Technologies (LLU)
Lithuania	Vytautas Magnus University, Lithuanian University of Health Sciences and Lithuanian Academy of Agriculture
The Netherlands	Wageningen University
Poland	Warsaw University of Life Sciences
Portugal	University of Evora and Polytechnic Institute of Viana do Castelo
Czech Republic	Czech University of Life Sciences Prague (ČZU) and South Bohemia University
Romania	Bucharest University, Cluj-Napoca University, Iași University, Timișoara University, Ovidius University of Constanța and Brașov University
Slovakia	Slovak University of Agriculture in Nitra
Slovenia	Maribor University
Sweden	Swedish University of Agricultural Sciences (SLU)

Source: Agence BIO

- There are some collaborations between EU public and private universities to offer a joint organic programme. In these programmes, students receive a double degree from two of the participating universities.

Advisory services and support

- Most EU countries support advisory services for organic farmers or those wishing to convert their farms. In some countries, state advisory services are required to offer services tailored to organic farmers, as in the state of Bavaria in Germany.
It is also often required that Chambers of Agriculture provide advice to organic farmers, as in France, Austria and Lithuania.
Advisory services for organic farmers can also be provided by organic associations, unions, or private organisations that receive public funding: Danish Agricultural Advisory Service in Denmark, FNAB network in France, PRO-BIO in the Czech Republic, SEAE in Spain, BIO AUSTRIA in Austria and Bioland in Germany.

- In France, the Brittany Region introduced a new organic farming advisory support in 2025, called the AGRI Bio Programme. It provides assistance to farmers through three modalities (diagnosis, monitoring, or resilience) and includes regional co-financing of this support by an authorized advisor.

- Training can also be offered to organic advisors to enhance their knowledge of organic farming. This is especially the case in Austria and Spain.

- The Organic Advice Network, the first European network of organic farming advisors, was established in spring 2024. It is coordinated by IFOAM Organics Europe. Initially, it had 18 members and aims to develop and manage a network of organic advisors across the 27 EU Member States as well as in 7 other European countries. The project is funded by the European Commission and the Swiss State Secretariat for Education, Research and Innovation.

Among its activities, the project includes international excursions on key topics in organic farming, a competition on innovative advisory systems and the development of a digital exchange and learning platform, with online modules designed by FiBL Switzerland and FiBL Germany. Many European organic organisations also participate as partners.
An action plan to strengthen organic advisory services will be developed within the framework of the project.

Subsidies for the certification of organic operators

- Several EU Member States have established support for the certification of organic operators: Germany[1], Austria, Belgium[1], Spain[1], Finland, Italy[1], Lithuania, Poland, Portugal[1] and Sweden.

- In Denmark, organic certification has been provided free of charge to organic operators through a government certification system since 1998.

Fiscal support for organic farmers

- In France, a tax credit for organic farmers was established in 2014. It applies to farms where at least 40% of turnover comes from certified organic activities. The credit amounts to €4,500 per farm per year and is expected to continue at least until 2028.

- In Spain, organic farmers have benefited from a 5% tax reduction for several years.

Investment support

- Several countries have established investment schemes reserved for organic businesses. This is the case in the following:

  - In France, a sector development fund, Avenir Bio, was established in 2008 and is managed by Agence BIO. Its goal is to support, over several years, contractual partnerships between groups of producers and processing, packaging, or distribution companies, in order to develop and promote high-quality organic products that create jobs locally. This fund assists economic actors engaged in these initiatives by reducing the cost of their investments, whether tangible or intangible,

  - Since 2016, Ireland has actively supported the processing of organic products through a dedicated grant programme. Today, this support exists in the form of the Organic Processing Investment Grant Scheme, managed by the Irish Department of Agriculture, Food and the Marine. The programme funds investments in facilities for processing, sorting, packaging and storing organic products, covering up to 60% of eligible costs. Funding rounds are opened regularly, the most recent in 2025 having a budget of €3.5 million,

1- In some regions of the country

- In Slovenia, organic producers can benefit from investment support to modernise their farms, purchase machinery or acquire greenhouses.

- It is also possible to support organic producers within the framework of general agricultural investment programmes. This can take different forms: higher installation grants for organic farming[1], increased subsidies for organic farmers for investments and equipment modernisation[2], as well as easier access to low-interest loans. Such loans can be granted through partnerships between the government and national banks, with the state's role being to guarantee the loan[3] or subsidise the interest.

- Governments can also allocate agricultural investment incentives for some sustainability practices, such as animal welfare in livestock investments or soil conservation measures. These incentives can be particularly beneficial for organic farmers, as such practices are required in organic production.

- In Slovakia, investment support is increased for organic processors.

Mapping of organic operators

- In France, CartoBio is a mapping tool for plots cultivated and certified in organic farming, provided by Agence BIO and INAO. There are two uses:

  - CartoBio Pro makes it easier for farmers to share their plot information, for certification bodies to conduct audits and certification and for the processing of CAP subsidies,
  - CartoBio "grand public"[4] allows citizens, local authorities and researchers to visualize organic plots. The data made available to the public is anonymised.

- In December 2022, BIO AUSTRIA launched Biomap, an interactive tool that allows consumers to easily locate organic producers, retail outlets, restaurants and accommodations in Austria.

Organic production and market monitoring

- All countries have implemented monitoring of organic production, which notably allows them to meet the European Commission's requirements for reporting to Eurostat.

- However, the monitoring of the organic market has only been developed by some countries, including Germany, Belgium, France[5], Italy, Spain and the Czech Republic. In addition, both France and Wallonia have a retail price observatory with organic product references.

1- For example, in certain regions of Italy and Spain.
2- This is the case in Flanders (Belgium), Madeira (Portugal), and Austria.
3- Example: The Netherlands
4- For the general public
5- In France, this work is carried out by Agence BIO.

Organic barometers

Consumer Barometers

■ In Germany, the barometer on organic product consumption, called the Öko-Barometer[1], has been conducted since 2002 on behalf of the Federal Ministry of Food and Agriculture. Each year, around a thousand interviews are carried out to analyse not only the frequency of organic product purchases by Germans but also their attitudes and motivations toward these products.

■ In France, the Perception and Consumption Barometer of Organic Products, launched by Agence BIO in 2003, is published annually[2]. It serves as a key tool for analyzing eating behaviours and their trends, the motivations and barriers to purchase, as well as the image of the AB label and organic products. The survey is representative of the French population, including at the regional level for the latest edition. In 2025, 6,100 people were surveyed.

Organic Producers Barometers

■ In France, in 2025, Agence BIO conducted for the second time a survey of organic farmers to gather their views on their morale, motivations, concerns and, more generally, their perception of organic farming[3]. A total of 3,800 producers responded.

■ In Wallonia, the first Organic Confidence Barometer was launched by UNAB in 2024[4]. It was a survey of organic farmers to gauge their morale in a context of economic and structural pressures in the sector.

Protection of public spaces and fragile areas

■ Many European municipalities have banned the use of chemical pesticides in public spaces. These decisions are made either by local elected officials or by the managers of green spaces. The transition often takes several years. Sometimes, these bans are implemented at a broader level, such as regional or national, as in France with the Labbé Law on the energy transition, or in Luxembourg, which has prohibited pesticides in public spaces since 2016.
Among EU municipalities that no longer use chemical pesticides are Copenhagen (Denmark), as well as Münster and Saarbrücken (Germany).

1- https://www.bmleh.de/SharedDocs/Downloads/DE/Broschueren/oeko-barometer-2024.pdf?__blob=publicationFile&v=3

2- https://www.agencebio.org/wp-content/uploads/2025/02/Baro-Conso-Bio_Synthese.pdf

3- https://www.agencebio.org/wp-content/uploads/2025/09/LAgence-Bio-Barometre-agriculteurs-bio-2025-Rapport-22092025.pdf

4- https://www.unab-bio.be/post/1er-barom%C3%A8tre-du-moral-des-agricultrices-et-agriculteurs-bio-de-l-unab-les-r%C3%A9sultats

Some municipalities also require farmers who manage their land to convert their farm to organic farming, a practice observed notably in Sweden and Italy.

■ The protection of fragile areas (such as drinking water catchment areas, parks, urban areas and areas near schools or hospitals) can justify the strict limitation or prohibition of plant protection products. Public authorities can encourage farmers to convert their farms to organic agriculture in these areas, notably through financial and technical support. Providing assistance to farmers in conversion within a water catchment area is generally more cost-effective than cleaning up water contaminated by inorganic fertilisers and chemical pesticides.
In Germany, Munich has strongly promoted organic conversion around its water catchment basins to protect water resources. A similar initiative exists in Leipzig. In Denmark, some municipalities (including Aarhus) have restricted pesticide use to safeguard drinking water.
In French national parks, the prohibition of pesticides contributes to the preservation of biodiversity.
In the Czech Republic, the 1992 Nature Protection Act prohibits the use of chemicals in protected areas and natural parks.

Support for integrating organic products into public catering

■ Support for organic farming can also involve the use of organic products in public collective catering. Indeed, this is one of the most effective ways to raise awareness of their consumption. Public institutions offer long-term contracts, which provide a reliable and stable source of income for organic farms. The decision to source organic products can be made at various levels: from an individual cafeteria to the municipality or the region[1].

Biodistricts and organic regions

■ One possible approach to link agritourism and organic farming is the concept of a biodistrict, as implemented in Italy. This involves cooperation between local authorities and private local stakeholders. In biodistricts, farmers, citizens, tourism operators, associations and public authorities work together to manage local resources sustainably, based on organic principles and practices. Restaurants, canteens and tourist resorts are encouraged to use locally produced organic products.

■ This concept of biodistrict has been adopted in other countries and an international network was established in 2014: INNER – the International Network of Eco-Regions. It brings together biodistricts that share a common vision: sustainable management of local resources based on organic farming, participatory governance and an integrated approach to territorial development (food, local economy, environment and culture).
INNER acts as a platform for exchange and cooperation, disseminating methodological frameworks, fostering the sharing of experiences among regions and supporting the establishment of new biodistricts.

1- Cf. chapter on Food service

- The creation of biodistricts is part of the EU Organic Farming Action Plan for 2021–2027. An award recognises the best biodistrict or the best organic region[1].

- The first Italian biodistrict was created in 2004 in Cilento. Early 2026, Italy had 83 biodistricts, including twelve in Tuscany. Their number continues to grow. In the National Organic Farming Plan, adopted in 2014, the Italian Ministry of Agriculture recognised the biodistrict as an important tool for the development of the organic sector.
The Liguria region has a regional law on biodistricts: among other measures, biodistricts receive financial support for tourism promotion, farmers subsidies are increased and the use of pesticides in public spaces is prohibited.

- In Germany, there are organic regions, a concept that differs from biodistricts because they are public policy initiatives created and funded by the Länder[2]. The main goal is to develop organic farming and regional value chains (production, processing and public catering). Each Land organises and funds its organic region programmes independently. Several Länder provide financial support for the development of organic regions, in particular Saxony and North Rhine-Westphalia.
Early 2025, around 50 organic regions were recorded in Germany, including 33 in Bavaria and 14 in Baden-Württemberg[3].
In July 2024, Bavaria celebrated the tenth anniversary of its first organic region. The creation of organic regions is part of Bavarian Organic Farming Development Programme for 2030, which began in 2013.

- In France, the Biovallée was established in the Drôme in 2002. This pioneering territory gathers local authorities, farmers, businesses, associations and residents to make ecological transition and organic farming a territorial development project. Beyond agriculture, the Biovallée addresses food, the economy, energy, tourism and biodiversity. Recognised as a European reference, this biodistrict is part of the INNER network and helps promote the biodistrict model in France and across Europe.
Besides, there is another concept in France: the Territoires Bio Engagés, established in 2012. This label is reserved for local authorities and their catering establishments that have met the organic targets of the Grenelle de l'Environnement and the National Ambition Bio Plan—that is, at least 8.5% of the territory's UAA must be grown organically, or collective catering services must offer at least 20% of organic products. At the beginning of 2025, 346 French local authorities held the Territoires Bio Engagés label.

- The first Portuguese biodistrict, Idanha-a-Nova in Beira Baixa, was created in 2017. Early 2025, five biodistricts were operational, with several others in development, supported by a handbook published in 2022 to guide their establishment. Idanha-a-Nova was awarded the EU Best Biodistrict Award in 2023.

- Late 2025, Austria had three biodistricts. The first, Mühlviertel in Upper Austria, was established in 2010. The second spans the states of Salzburg and Upper Austria and the third is located in Lower Austria.

1- In 2025, Võru County in Estonia won. It is not a biodistrict.

2- Organic regions are not part of INNER.

3- The first organic region in Baden-Württemberg was established in 2018.

- In Spain, an action plan for the creation of biodistricts has been developed in Andalusia by the Junta de Andalucía, based on the cooperation of local action groups to revitalise local agri-food systems and promote organic, locally sourced farming. A pilot project has been launched, in particular, to establish a large biodistrict in the Sierra de Huelva area. Andalusia plans to expand this model to other territories across the region.
Several biodistricts are also being established in other autonomous communities.

- In Sweden, there is a biodistrict in Södertälje and one in Sörmland. The latter won the EU Best Biodistrict prize in 2024.

- In Latvia, a biodistrict is being established in Gauja National Park (Vidzeme), the first of its kind in the Baltic countries. The project was launched in 2023.

- In Croatia, the Međimurje biodistrict in the north of the country is being established. It received official recognition in 2025.

Organic Cities

- Organic City Network Europe was officially launched in Paris in January 2018. It includes over 80 cities, such as Paris, Vienna, Nuremberg and Milan[1], as well as two research institutes (the Milan Centre for Food Law and Policy and Bio Forschung Austria). The network promotes organic food and farming. It provides cities with a platform for cooperation on issues such as the future of the Common Agricultural Policy, regional and local food supply chains, public procurement of organic products, research and innovation, the true cost of food, increased transparency in supply chains and access to land for new organic farmers. The network also has environmental goals, including soil and water quality and reducing CO_2 emissions. It also seeks to raise awareness among local populations about the health and environmental benefits of organic food. Its goals also include creating new employment opportunities and improving food security.

- The Italian association *Città del Bio* is a member of the Organic City Network Europe. It was established in 2003 and gathers municipalities and local authorities committed to promoting organic farming—not only as an agricultural model but also as a cultural project. The association fosters the connection between production and consumption and builds alliances among municipalities. Its goals are to adopt and encourage the careful and efficient use of resources (promoting sustainable consumption), to develop and promote organic production, to protect biodiversity, to encourage food education by guiding responsible consumption and to promote organic farmers' markets and short supply chains. It currently includes 158 municipalities.

- The German Organic Cities Network is also a member of Organic City Network Europe. Bremen won the EU Best Organic City Award in 2024.

1- Also: Correns, Florence, Bremen, Lauf, Seeham, Poreč, Växjö and Loro Ciuffenna.

National and regional organic logos

- In Austria, the AMA organic label is a state-recognised quality mark for organic food products. Created in 1994 by AMA-Marketing, it builds on the EU organic logo while going further by imposing higher standards for food quality and environmental protection. This label exists in two versions: one with the origin label "Austria", ensuring that the agricultural raw materials come exclusively from Austria, and another without any origin indication.
Vienna introduced a municipal organic label in 2022: Wiener Gusto, for its locally sourced organic supplies. No other regional organic label appears to exist in Austria.

- In the Czech Republic, the national Biozebra logo has been used as a mark for organic products since the 2000s. It is mandatory for organic products produced or packaged in the Czech Republic, in addition to the EU organic logo. For imported organic products, the use of the national Biozebra logo is not required but remains possible.

- In Denmark, the Ø label was launched in 1989[1]. The state is responsible for certification. It is used on food from Danish organic farms as well as on imported foods that are processed, packaged, or labelled in Denmark.

- In Germany, there is a national organic logo that was created in 2001. It is an optional logo but widely used alongside the mandatory EU organic logo on products sold in Germany.
In addition, several Länder have introduced regional organic logos: Baden-Württemberg, Bavaria[2], Brandenburg, Hesse, Mecklenburg-Western Pomerania, and Saxony. These regional organic logos aim to promote the use of locally produced organic products in public catering and to meet the demand from large retailers seeking regional organic products.

- In France, the AB label celebrated its 40th anniversary in May 2025. It is not used to identify French organic products specifically, but it is equivalent to the EU organic logo. Unlike the Euroleaf, it is optional on packaging.

- In Hungary, the national organic plan includes the creation of a new private and voluntary organic standard (with requirements higher than the EU regulations) and an associated logo.

- An Italian organic label was announced as early as September 2023. Its goal is to identify organic products made from Italian raw materials. The decree[3] from the Italian Ministry of Agriculture regarding the organic label was published on 5th February 2026 by the State-Regions Commission. It is currently being notified to the European Commission before it can be formally adopted.

1- The Danish organic logo is recognised by 98% of the population.

2- The Bavarian organic logo celebrated its 10th anniversary in 2025. Over 4,000 products carried this logo in 2025.

3- https://www.statoregioni.it/it/conferenza-stato-regioni/sedute-2026/seduta-del-5-febbraio-2026/atti-5-febbraio-2026/repertorio-atto-n-7csr/?utm_source=chatgpt.com

Main organic trade fairs and festivals

There are trade fairs dedicated to organic agriculture in most EU countries. Here are the main ones:

Country	Name	Type of fair	Year of establishment	Frequency	Location	Participation
Austria	BIO AUSTRIA Messe	Mainly B2B	2015	Annual	Wieselburg	Over 120 exhibitors and over 5,500 visitors in 2024
Czech Republic	BioStyl	Mixed B2B and B2C trade fair	2007	Annual	Prague	428 exhibitors and 16,600 visitors in 2025
France	La Terre est notre métier	B2B	2001	Biennial	Retiers	146 exhibitors and 8,000 visitors in 2024
	Marjolaine	B2C	1982	Annual	Paris	Around 400 exhibitors and approximately 50,000 visitors in 2025
	Millésime Bio	B2B – wines & alcohols	1993	Annual	Montpellier	1,500 exhibitors and 9,500 visitors in 2025
	Natexpo	B2B - aval	2002	Annual	Paris/Lyon	900 exhibitors and nearly 11,000 visitors in 2025 (Paris)
	Tech & Bio	B2B - demonstration	2007	Biennial	Bourg-lès-Valence	375 exhibitors and 21,000 visitors in 2025
Germany	Anuga Organic	B2B	Early 2000s (within Anuga)	Biennial	Cologne	319 exhibitors and nearly 53,000 visitors in 2025
	BioFach	B2B	1989	Annual	Nuremberg	2,300 exhibitors and nearly 35,000 visitors in 2025
Greece	BioFestival	Mixed B2B and B2C trade fair	2019	Annual	Athens	120 exhibitors and 7,710 visitors in 2023
Italy	BiodiVino	Mixed B2B and B2C trade fair – Wines	2004	Biennial	Monreale	nd
	SANA	B2B	1988	Annual	Bologna	650 exhibitors and 12,500 visitors in 2023
The Netherlands	BioBeurs	B2B	2016	Annual	Zwolle/Apeldoorn	8,500 visitors in 2024
Poland	Bio Expo Warsaw	B2B	2019	Annual	Warsaw	239 exhibitors and 10,700 visitors in 2025

	Ekogala	Mixed B2B and B2C trade fair	2006	Annual	Jasionka	Over 100 exhibitors in 2025
	Natura FOOD	Mixed B2B and B2C trade fair	2008	Annual	Łódź	150 exhibitors
Portugal	Terra Sã	B2C	1988	Annual	Lisbon	80 exhibitors in 2024
Spain	FAPEA[1]	Mixed B2B and B2C trade fair	Early 2000s	Annual	Llanera	68 exhibitors in 2025 (number of visitors unknown)
	Feria BioCultura	Mainly B2C	1983	Several times a year	Madrid/ Barcelona	Madrid: 800 exhibitors and 70,000 visitors in 2025 Barcelona: 320 exhibitors and 36,000 visitors in 2025
	Bio Terra	B2C	2004	Annual	Irun	Around 120 exhibitors and 10,000 visitors in 2025
Sweden	Eco Living Scandinavia	B2B	2012	Annual	Stockholm	200 exhibitors and 5,000 visitors in 2025
	Nordic Organic Food Fair[2]	B2B	2012	Annual	Malmö/Stockholm	Over 350 exhibitors and over 2,500 visitors in 2025 (Malmö)

Source: Agence BIO

Other actions

Other kinds of actions in support of the development of organic agriculture can also be implemented. Here are a few examples:

- State support for organisations dedicated to the development of organic agriculture in many countries (examples: BIO AUSTRIA in Austria and Federbio in Italy),
- Encouragement of organic gardening by citizens and in public green spaces in Baden-Württemberg, Germany, through the Biodiversity Enhancement Act, adopted in 2020[3],
- Funding for free advisory visits for organic farmers in Denmark,

1- Feria Agroalimentaria de Productos Ecológicos de Asturias

2- Integrated into Nord Organic Expo, the Nordic Organic Food Fair is focused on organic food.

3- Authorities expect a 40% to 50% reduction in pesticide use in the state by 2030, while significantly increasing the share of organic gardening and farming.

- Implementation of organic cooking courses to train unemployed people in cooking with organic food in Spain[1],
- Creation of dedicated funds to support specific sectors, such as the one for medicinal and aromatic plants in Italy, launched in 2024 with €1.5 million to finance research and initiatives addressing the needs of agricultural and agri-food businesses.

IFOAM Organics Europe

Established in 1972, IFOAM Organics International is an organisation working to bring true sustainability to agriculture worldwide.

IFOAM Organics Europe is the European umbrella organisation for organic food and farming. It represents the organic sector in European policymaking and advocates for a transformation of food and agriculture. IFOAM Organics Europe has nearly 200 members across 34 European countries.

The areas of activity of IFOAM Organics Europe include the promotion and development of organic farming in Europe, political advocacy on agricultural and environmental policies, support for research, innovation, and knowledge sharing, as well as the coordination of a broad network of organic stakeholders and the promotion of sustainability.

The EU institutions recognise IFOAM Organics Europe as the main advocate for organic food and agriculture in the European Union.

In recent years, IFOAM Organics Europe has focused on:

- A remuneration for farmers for the services they provide, particularly in terms of water quality and biodiversity protection,
- An increase in conversion to reach 25% of UAA by 2030,
- Maintaining an EU supply free from GMOs,
- Strengthening research funding,
- An increased support for advisory services,
- Strengthening links between the various organic stakeholders,
- A Fair remuneration for organic producers,
- The highlighting of the contribution of organic agriculture to climate change mitigation and adaptation.

In September 2025, IFOAM Organics Europe launched the campaign "Organic Delivers, More than You Think"[2], with "delivers" meaning keeps its promises, delivers results. The campaign then included several videos and podcast episodes to showcase different aspects of the benefits of organic agriculture.

1- By Vida Sana

2- More information: https://www.organicseurope.bio/organic-delivers/

Conclusion on development policies in the European Union

For over thirty years, the European Union has positioned itself as a driving force in supporting organic farming, gradually mobilizing increasingly structured financial, regulatory, and strategic instruments. The European Green Deal, the "Farm to Fork" strategy, and the 2021–2027 Organic Action Plan reflect this strong political commitment, placing organic farming at the centre of the agroecological transition, with the emblematic target of reaching 25% of the UAA by 2030.

Each Member State has a national strategic plan for the 2023–2027 CAP. Several of them have also established a national plan for the development of the organic sector.

The analysis of intentions to develop the organic sector and their translation into public policies highlights a marked contrast between a strong European ambition and a heterogeneous national implementation, sometimes misaligned with stated goals. On one hand, some Member States with a long-standing commitment to organic farming set high targets and already have a significant share of UAA in organic, supported by coherent measures combining conversion subsidies, maintenance subsidies, demand support, and supply chain structuring. On the other hand, many countries remain at more modest levels of organic land, with low targets and budgets that are sometimes insufficient or unstable. This diversity of national trajectories illustrates the considerable leeway provided by the 2023–2027 CAP but weakens the collective capacity to reach 25% of UAA in organic farming by 2030.

The EU organic sector will need a more supportive CAP after 2027. However, even greater autonomy is expected to be granted to Member States in the next CAP. As a result, support for the organic sector is likely to become even more heterogeneous than it is today.

Some measures are found in almost all countries: the establishment of financial support to assist the conversion to organic farming and to support farmers already engaged, the setting of national targets and structured action plans, and support for research, training, and advisory services to improve practices. Many countries are also working to strengthen processing and marketing supply chains, stimulate demand through promotional campaigns and the introduction of organic products in public catering, while consolidating consumer trust.

SWOT analysis of the EU organic sector

		STRENGHTS	WEAKNESSES	OPPORTUNITIES	THREATS
Production	Production		Slowing growth of organic farmland, and even stagnation or decline in some countries	Growth of biodistricts	Aging of farmers, difficulty in generational renewal
			Difficulties in obtaining bank loans in some countries	Development of the use of plant varieties and animal breeds suitable for organic production	
			Lack of availability of high quality organic agricultural inputs in some countries		Effects of climate change: droughts, extreme weather events, and health risks
			Rising production costs in organic livestock farming		
			Increase in energy prices due to the war in Ukraine		
	Training	Lots of organic training in the EU (especially for post-high school education)	Not enough professional training in some countries		
				Development of organic training	
	Knowledge Transfer	Organic Eprints	Still underdeveloped in some countries	Improving access to information available via the Internet	
		Networks of organic demonstration farms			
	Advice	Support structures in many countries	Not sufficiently developed in some countries	Improvement of organic farming advisory services thanks to the Organic Advice Network	
			Advisors insufficiently trained in some countries		
	Certification		Certification costs often too high	Development of certification under PGS	
	Incomes			Development of fair trade in organic sectors	
				Development of direct sales	
	Structuration	Organic sector not sufficiently organised in many countries		Development of contractualisation	

	GMO				New genomic techniques (NGTs) soon to be authorized
Processing	**Processing Costs**		Rising energy costs linked to the war in Ukraine		
	Processing		Limited availability of certain organic products in some countries	Development of processing tools	
			Strong pressure from discount retailers on suppliers to lower prices		
Distribution	**Distribution Channels**			Diversification of distribution channels	
				Innovations in the distribution of organic products	
				Evolution of food distribution in many countries	
	Mass Retail	Development of the organic range			Price War
	Organic Shops		Weakening in some countries	New concepts	
	Online	More organic products online, in proportion, than in physical stores		Development beneficial to the organic market and its wider accessibility	
	Food service	Allow to promote organic products to young people			Catering with organic reserved for the richest in some countries
Consumption	**Perception of organic products**	Positive image, product regarded as high-quality	Image of an expensive, even luxurious product	Development of the promotion of organic products	
			Poor knowledge of organic farming in some countries	Explaining more why organic products are more expensive	
				New EU Action Plan	
				Communicate more about the preservation of biodiversity	
	Demand			Demand not fully satisfied	New rise in inflation
			More developed in cities, not enough elsewhere		Economic risks associated with armed conflicts
			rowing interest in local products, often at the expense of organic products	Growth of organic product sales thanks to tourism	

			Mismatch between the growth rate of demand and production		
			Many other competing labels		
	Demographic Developments	Strong interest of the younger generations (Y and Z) for organic products			Decline in birth rate
	Behavioural Changes	Increased interest in purchasing healthy products since the pandemic	Price increasingly seen as the main barrier to purchase	Growth of the food safety criterion	
				Environmental protection: growing choice criterion	
				Aim to reduce waste (packaging and food)	
Political Support	**General**	Benefits of organic products increasingly recognised by public authorities	Easing of certain environmental rules in the current CAP as a result of the war in Ukraine		Risk of weakened support for the organic sector under the next CAP
		An EU regulatory framework	Resources allocated in the RSPs are often insufficient to achieve the targets for the share of UAA under organic farming		High risk of not achieving the target of 25% of UAA grown organically in the EU by 2030
			Targets for the organic share of UAA vary, being sometimes unrealistic and sometimes lacking ambition		Total withdrawal from the European Green Deal
	Operators	Help conversion	Still insufficient in some countries	Diversification of support	
		Support programmes for the organic sector in many countries			
	Consumers	Promotion and education on organic products		Multiplication of communication tools	
	Research	Programmes dedicated to organic farming		Development of political support	
Organic organisations		Many NGOs and associations involved in the organic sector	Lack of coordination in some countries		
			Weak representation of organic sector interests still exists in some countries		

Conclusion

With 11.1% of its UAA and a market worth €55.1 billion in 2024, organic farming occupies a significant place in the EU agricultural landscape. Over the past twenty years, organic areas have expanded substantially, supply chains have become more structured, and the organic market has developed in the majority of Member States. Organic farming now covers all major crop and livestock productions.
This growth, however, remains highly uneven across countries. Some already have a high share of organic land, efficient processing infrastructure and a strong domestic market. Others are at an earlier stage, with limited areas, a small processing sector and a heavy reliance on exports of unprocessed products.

The European organic market continues to grow overall, but in a more uncertain context. Rising inflation and pressure on purchasing power have slowed consumption in some countries.
While organic products benefit from a positive image, price remains a major barrier. According to the January 2025 Eurobarometer[1], 56% of EU Citizens recognise the EU organic logo, with significant differences between Member States[2]. Better information, increased in-store visibility, and more targeted communication campaigns could considerably boost organic purchases.

The European Union supports the organic sector through the Common Agricultural Policy (notably by providing access to conversion and maintenance aid), funding for research, promotional activities, and the 2021–2027 Organic Action Plan, which is part of the Green Deal and the "Farm to Fork" strategy.
However, an analysis of the national strategic plans reveals a gap between the stated ambitions and the resources allocated. Levels of support, goals set, and budgets available vary significantly from one country to another. In several Member States, the resources planned appear insufficient to achieve the announced goals.

In its report of 23 September 2025, the European Court of Auditors highlights that the €12 billion invested since 2014 to expand organic areas has not delivered the expected results: insufficient targeting of funding to strengthen farmers' positions in the value chain, limited alignment between environmental and commercial goals, and a lack of data to assess impact. The report also points out the limitations of the non-binding target of 25% organic agricultural land by 2030. It recommends a post-2030 strategic vision, with measurable goals and better-targeted support in the post-2027 CAP. IFOAM Organics Europe shares this analysis.

The development of the organic sector relies on a fragile balance between political will and economic realities. Strong, coherent, and stable political support, both at the national and EU levels, is essential to ensure the organic sector growth in the coming years, including:

- Better integration of environmental goals in the next CAP,
- A long-term strategy with quantifiable and realistic goals, accompanied by benchmark indicators for organic production and consumption

1- Survey conducted from 13 June to 8 July 2024 across the 27 EU Member States, with 26,349 respondents from various social and demographic groups.

2- The highest awareness of the Euroleaf is in the Netherlands, at 74%.

- More effectively targeted and assessed subsidies
- Enhanced training, knowledge transfer, advisory services, research, and innovation,
- Support for developing processing[1] and building structured organic supply chains,
- Maintaining clear, stringent and reliable certification rules to preserve consumer trust and protect the sector from declining standards or unfair competition,
- Strengthening support for territorial initiatives (e.g., biodistricts),
- Stimulating demand, particularly through strengthened communication to better convey the added value of organic products and via public catering[2].

- The announced directions for the next CAP, granting greater flexibility to Member States, nevertheless raise concerns about a potential reduction in national support for organic and converting farmers.

- Eventually, the evolution of the sector will also depend on macroeconomic factors such as inflation and purchasing power, as well as on the diversification of distribution channels, which is crucial to safeguard market opportunities for organic producers.

1- In some countries, raw organic products are still mainly exported while processed products are imported, underlining the strategic importance of investing in local processing to generate greater value within the territories.

2- Promoting the use of organic products in public catering represents an effective means of raising awareness among younger generations and safeguarding market opportunities.

Glossary

A'Verdis: German firm supporting its clients in the development of sustainable catering solutions for the food service industry.

AECM: Agri-Environmental and Climate Measures. These are multi-year contractual environmental commitments (usually 5 years), compensated to offset additional costs and income losses. These measures, part of the second pillar of the CAP, particularly concern Natura 2000 areas or high-priority territories, and include actions such as reducing pesticide use, delaying mowing to protect biodiversity, maintaining ecologically valuable grasslands, or planting crops beneficial to pollinators.

AMF: Association of the Mayors of France and Presidents of Intermunicipal Authorities, founded in 1907 and recognised as a public utility organisation in 1933. It defends the interests of municipalities and supports local self-governance and decentralisation.

Bioeconomy: This is an economic model based on the sustainable use of biological resources to produce food, energy, materials and services. It aims to replace fossil resources with renewable alternatives and to promote a circular economy. It integrates scientific innovation, sustainable agriculture and responsible biodiversity management.

Bio-Städte: German Organic Cities Network. Its members are Augsburg, Berlin, Bielefeld, Bonn, Bremen, Cologne, Darmstadt, Delmenhorst, District of Lower Bavaria, District of Lüchow-Dannenberg, Erfurt, Erlangen, Freiburg, Freising, Goslar, Hamburg, Heidelberg, Höhenkirchen-Siegerrsbrunn, Ingolstadt, Karlsruhe, Lanshut, Lauf an der Pegnitz, Leipzig, Much, München, Münster, Nuremberg, Regensbourg, Witzenhausen and Würzburg.

Blockchain: It is a technology that allows information to be stored and transmitted transparently, securely and without a central control body.

Bund Ökologische Lebensmittelwirtschaft : This is the umbrella association of agricultural producers, processors and traders of organic food. It has sixteen member associations: Association ökologischer Lebensmittelhersteller (AöL), Biokreis, Bioland, Bioland Verarbeitung & Handel e.V., Biopark, Bundesverband Naturkost Naturwaren (BNN), Dachverband ökologische Pflanzenzüchtung in Deutschland (BÖLN), Demeter, Ecoland, ECOVIN, GÄA, Interessengemeinschaft der Biomärkte, Naturland, Arbeitsgemeinschaft der ökologisch engaged Lebensmittelhändler und Drogisten (AÖL), Reformhaus eG and Verbund Ökohöfe.

Canteens in Italy: This word designates all the school catering institutions belonging to the same public authority.

CBI: Centre for the Promotion of Imports from Developing Countries. This Dutch public agency, affiliated with the Ministry of Foreign Affairs, supports companies in developing countries in accessing European markets. It provides market studies, trend analyses, and consumer data (agrifood, organic products, textiles, etc.) and assists exporters in complying with EU standards (quality, sustainability, certifications).

Central and Eastern European countries (CEE): Bulgaria, Croatia, Estonia, Hungary, Latvia, Lithuania, Poland, Czech Republic, Romania, Slovakia and Slovenia. The Czech Republic is considered the most industrialised and developed of them.

Certificate of Inspection (COI): This electronic certificate ensures that organic products imported from a third country comply with EU legislation on the matter. It must be completed in the TRACES system.

CINEA: European Commission Executive Agency for Climate, Infrastructure, and Environment, established to manage and support European programmes in these areas. Formerly CHAFEA (Executive Agency for Health and Consumers).

CNOUS: In France, National Centre for University and School Services

Commercial catering: This includes establishments that prepare and sell meals or drinks intended to be consumed immediately, either on-site or to take away, in a competitive and commercial environment.

CPAER: Consejo de la Producción Agraria Ecológica de La Rioja. This is the official body responsible for the certification and control of organic agricultural products in La Rioja region.

Cyprinidae: This family of fish includes carp, gudgeon, minnows and associates (including barbs and barbel).

Daycare centres in Germany: They accept children from one to six years old.

DEPHY : Created as part of the Ecophyto plans, this network includes approximately 3,000 farms (including over 700 organic or in conversion), dedicated to experimentation and the reduction of plant protection products.

Drive: This word generally designates a point of withdrawal of goods where the customer takes delivery of his articles directly within or near his vehicle. First used for buying from fast food without leaving your car, it has also been used for a few years to designate the withdrawal points offered by retail chains which allow the delivery of items to the car. In this case, the order is placed beforehand on the brand website or from a mobile application on a smartphone and the customer chooses a time slot to pick up their purchases.

Eco-schemes: annual payments to encourage environmentally friendly farming practices, without multi-year commitments. These voluntary measures, integrated into the first CAP pillar, aim to adopt or maintain virtuous practices such as cover cropping, permanent grasslands, biodiversity (hedgerows), extensive livestock farming, organic farming or High Environmental Value (HVE) practices.

Educabio: Spanish educational programme aimed at promoting healthy eating habits and knowledge of organic products among children and the entire school community. It is managed by Ecovalia.

EGALIM Law: French law for the balance of trade relations in the agricultural sector and healthy, sustainable and accessible food for all, promulgated on November 1st, 2018. The organic production method is especially highlighted by the law which sets a target of 20% of organic products in collective catering extended to private collective catering with the exception of restaurants of private companies: By January 1st, 2022, a share at least equal, in value, to 20% of organic products or from a farm in conversion will be included in meals served in collective restaurants. This goal applies to establishments managed by legal persons of public or private law, as soon as they have a public service mission.

Equivalence 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 identical (without each country having to modify them), if they produce the same results and aim for the same goals, even if the means employed are different.

Generation Y: Also called Millennials, it gathers people born between 1981 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.

Good Food: Brussels label for sustainable food including organic.

Halloumi Cheese: Cypriot cheese. Initially produced from sheep's milk, goat's milk and mint leaves, some producers add cow's milk to it. This cheese is distinguished from other cheeses by its texture. Rather elastic, it is one of the few cheeses that does not melt when cooked.

ICE: Agency for the promotion abroad and internationalization of Italian companies

IDDRI: The Institute for Sustainable Development and International Relations is an independent French think tank that analyses sustainable development policies. It produces research and recommendations to support ecological, economic and social transitions, while fostering dialogue between scientists, policymakers and field actors to propose concrete solutions.

Imports: This word is used broadly in this document, i.e., it also includes trade between EU Member States.

INOSYS : Led by the Chambers of Agriculture, this network produces technical and economic references based on around 1,500 farms, some of which are organic farms.

IRTA: Institute for Food and Agricultural Research and Technology. Public institute of Catalonia. It works notably on organic rice.

ISOFAR: The International Society of Organic Agriculture Research is a scientific organisation that gathers researchers and institutions working on organic agriculture. It promotes the exchange of knowledge, the dissemination of research results and collaborates with IFOAM EU to connect science with the needs of the organic sector.

Joint Research Centre: This is the European Commission's internal scientific service. It provides independent analyses and data to support EU policies. Its aims to inform public decisions through reliable scientific expertise.

KEKS: The KEKS (Knowledge Exchange & Kreative Solutions) projects are collaborative European initiatives focused on educational innovation and digital transformation. They aim to develop interactive educational tools and methods that enhance learner engagement. These projects encourage the sharing of best practices among institutions across Europe. The goal is to improve learning through creative and participatory solutions.

Labbé Law on the Energy Transition: Since January 1st, 2017, it has prohibited the use of chemical pesticides by the State, local authorities, and public institutions in green spaces, forests, roads, and public walkways open to the public, with the exception of substances authorised in organic farming. As of July 1st, 2022, the bans were extended to many private places for collective use or frequented by the public (private properties, hotels, campsites, cemeteries, schools and healthcare facilities, sports facilities, etc.). Since January 1st, 2025, the ban also applies to certain sports grounds (main playing fields, tennis lawns, racecourses, golf courses), with possible temporary exemptions until July 1st, 2026.

Ma Cantine: Free digital platform developed by the French Ministry of Agriculture, Food and Food Sovereignty to support collective catering actors in adopting more sustainable practices.

Milan Centre for Food Law and Policy: Italian organisation dedicated to the study and promotion of the right to food and the sustainability of food systems. Established following the 2015 Milan Universal Exposition, it works to strengthen global governance of food resources. It promotes dialogue among institutions, researchers and citizens on food policies. Its aim is to support legal frameworks that ensure equitable access to healthy and sustainable food.

Milan Pact: International agreement promoted by the FAO by which the participating cities commit to developing sustainable, fair and healthy food models. Currently, 197 cities have signed this pact.

Organic agritourism: Accommodation or catering on the farm offering products from organic farming.

Perennial crops: Also called permanent crops. They stay in place for at least two consecutive years.

PGS: Participatory Guarantee Systems. These are locally oriented quality assurance systems. They certify producers based on the active participation of stakeholders and are built on trust, networks and knowledge sharing. They jointly choose a set of standards for organic agriculture and a set of procedures and designate a coordinating body.

PIŻE: The Polish Chamber of Organic Food, is an organisation bringing together organic farmers, processors and distributors. Its mission is to promote organic products by participating in educational campaigns and organising professional events.

Public collective catering: It includes nurseries, canteens of schools, junior high schools and high schools, universities, hospitals, government buildings, prisons and armies.

REKO: REttferdig Konsum, or fair trade consumption. Created in Finland in 2013, this concept, inspired by Community Supported Agriculture (CSA) programmes, has spread to Sweden and Norway. Local producers advertise their products through Facebook groups, and consumers order directly. Delivery points, often located in city centres, allow for direct interaction between producers and customers, who pay on-site. The products are local, seasonal and sold at reduced prices thanks to the absence of intermediaries, packaging, or advertising. Producers harvest only what is ordered, avoiding waste and benefit from direct feedback from consumers.

Restopolis: This is Luxembourg's public collective catering service, under the supervision of the Ministry of National Education, Childhood and Youth. Created in 2005, its mission is to provide healthy, balanced, sustainable and accessible food in the country's schools and universities.

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.

School catering under delegated management: The local authority entrusts management to a specialised private company that operates the service. The company may prepare meals in its own central kitchen or on-site. The authority pays the provider, who takes care of all or part of the service (production, distribution, staff, cleaning, etc.).

School catering under direct management: The local authority manages the service itself. The municipality (or inter-municipal public body) directly oversees meal production and distribution. It employs its own staff (cooks, service staff, supervisors), purchases food and equipment and manages the municipal kitchen. Revenues (payments from families) and expenses (salaries, purchases, maintenance) are integrated into the municipal budget.

Still wine: This is a wine that does not form bubbles when the bottle is opened. It is the opposite of sparkling wine.

Supermarkets in Germany: Their sales area is above 100 m².

Third country/ies: Country/ies outside the European Union

TRACES: TRAde Control and Expert System. Online management tool from the European Commission which centralises all health requirements and tracks the movements of animals and embryos, as well as foodstuffs, marketed or imported into the European Union.

UAA: The Utilised 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.

URBACT: A European programme aimed at helping cities develop sustainable and innovative urban policies. It promotes cooperation and the exchange of best practices between cities on common issues. The goal is to improve the quality of life in urban areas.

Vitalküche: This is a quality label specific to the catering sector in Lower Austria. It aims to guarantee balanced, regional, seasonal and organic food in participating establishments. A minimum of 25% organic content is required in the menus.

Võru County: Region in the south-eastern part of Estonia.

Sources

- Information on EU organic sector comes from multiple sources.

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V
Valio, VENECA, Veritas and Vida Sana

W
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X
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Y
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Z
Zepros

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