



# 20 EUROPEAN 25 ORGANIC CONGRESS

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**STRENGTHENING ORGANIC ROOTS FOR  
A COMPETITIVE AND SUSTAINABLE 2050**

**25-27 JUNE**

**WARSAW, POLAND**

#EUorganic2030

#EOC2025



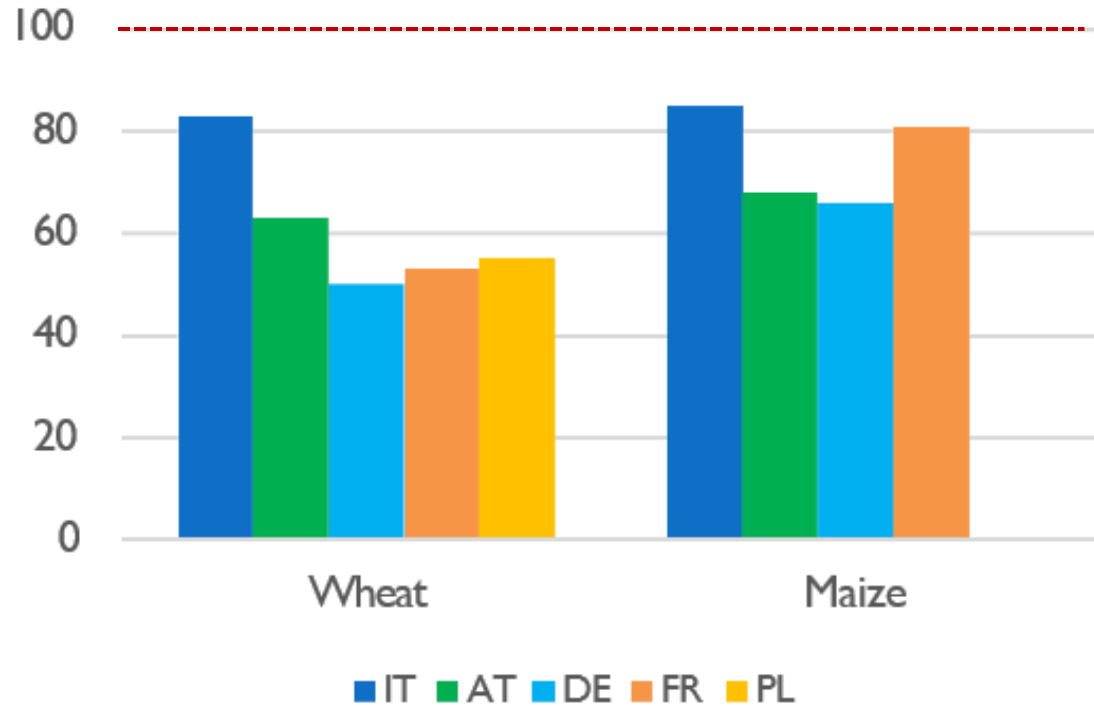
# Organic farming economics: A profitability analysis

Dr. Jörn Sanders  
FiBL

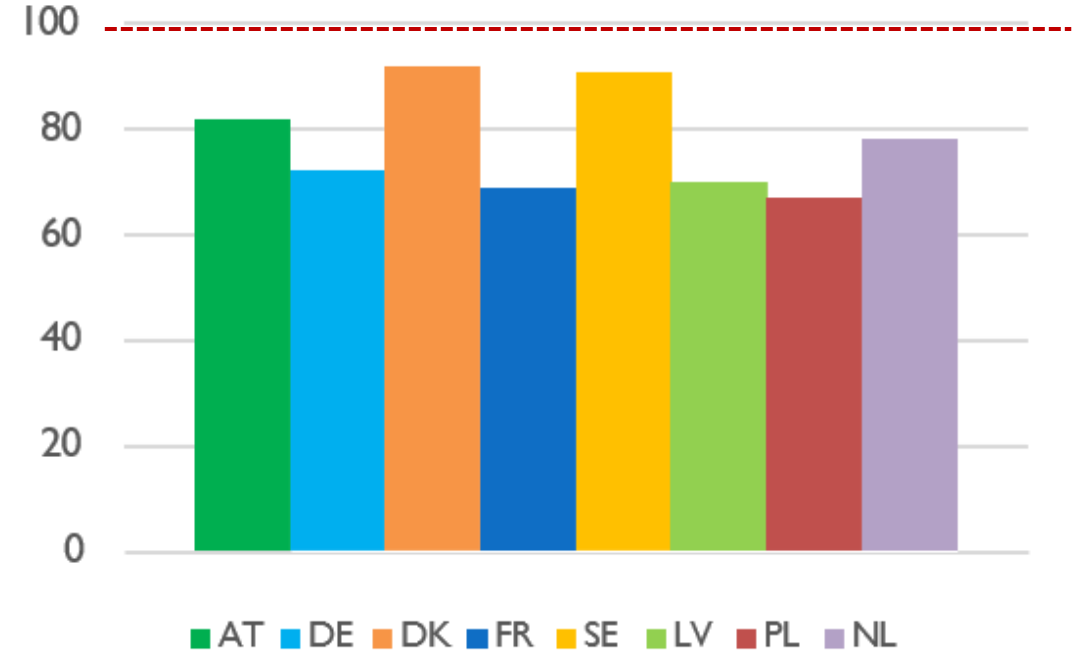
# Vision for organic agriculture – A vision for a competitive and sustainable farming sector



# Organic yields compared to conventional yields



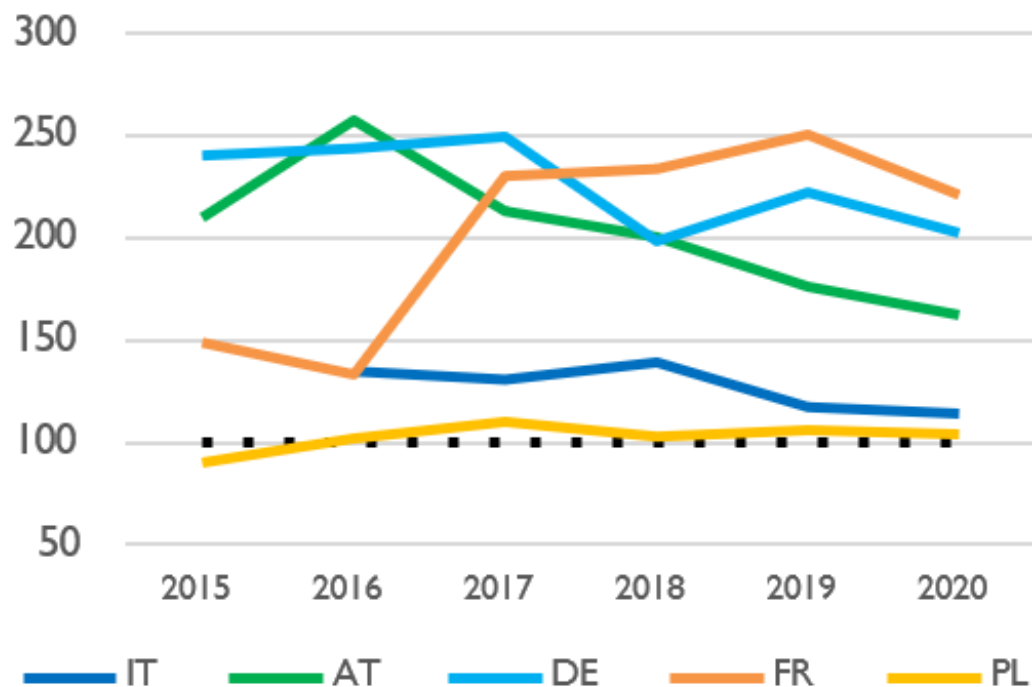
**Arable crops** (conventional=100), in 2015-2020,  
Source: EU FADN.



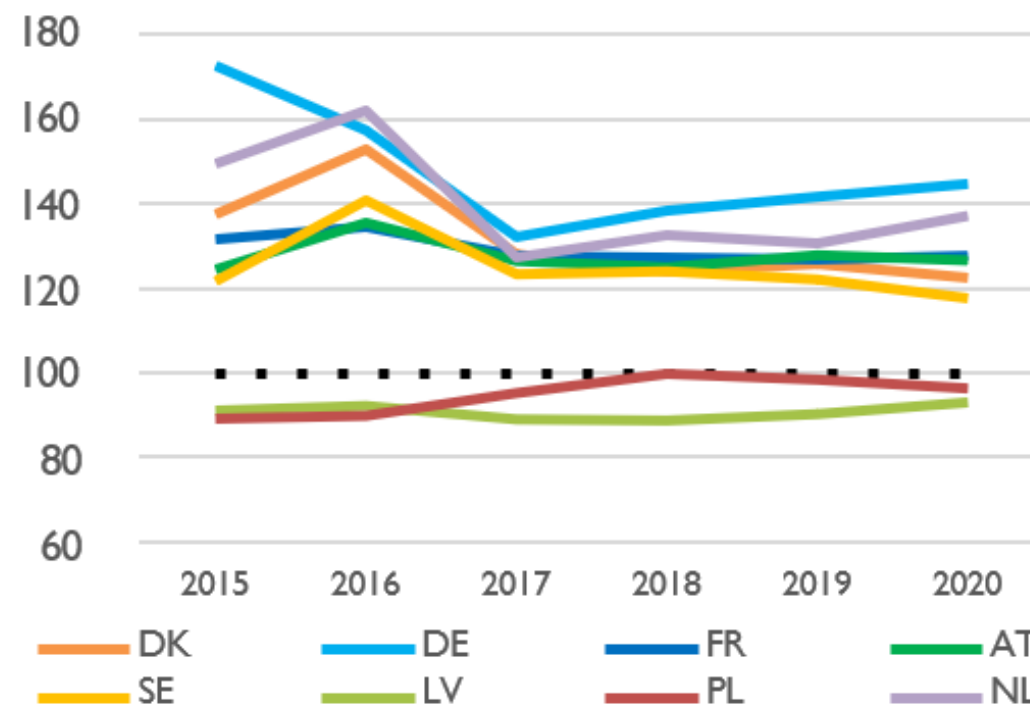
**Dairy cows** (conventional=100), in 2015-2020,  
Source: EU FADN.



# Premium on producer price in selected countries

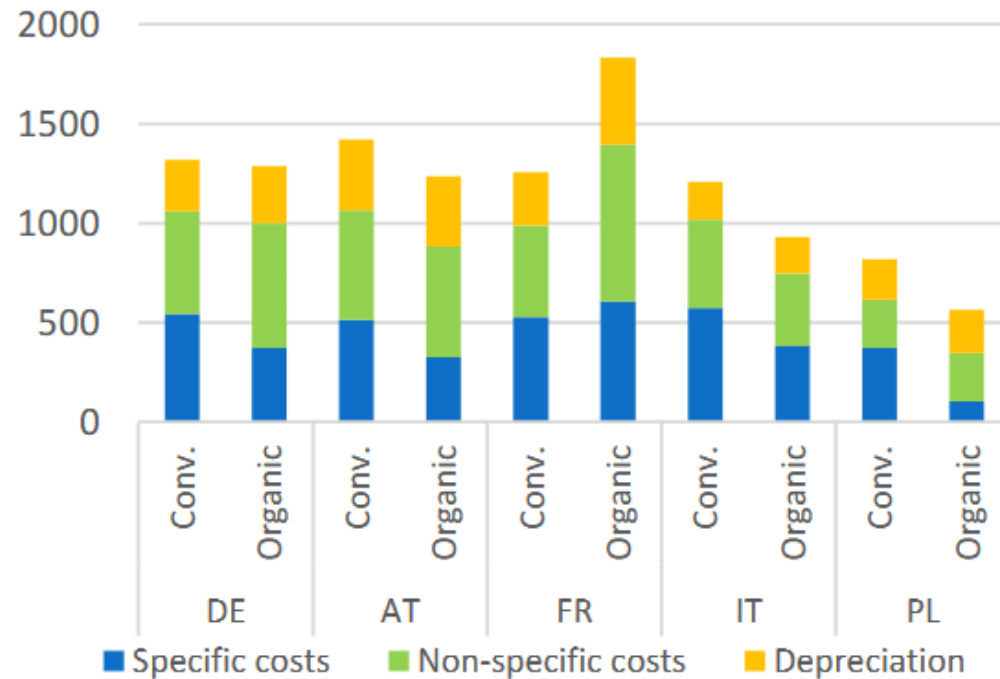


Organic common **wheat** (conventional=100),  
in 2015-2020, Source: EU FADN.

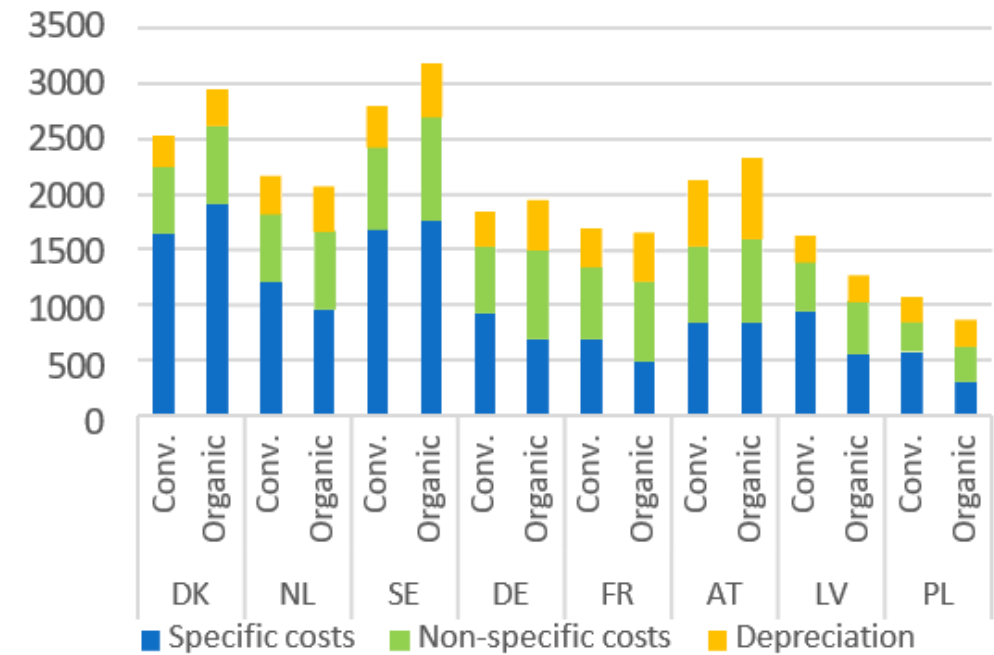


Organic **milk** (conventional=100),  
in 2015-2020, Source: EU FADN.

# Costs for conventional and organic farms (EUR/ha)

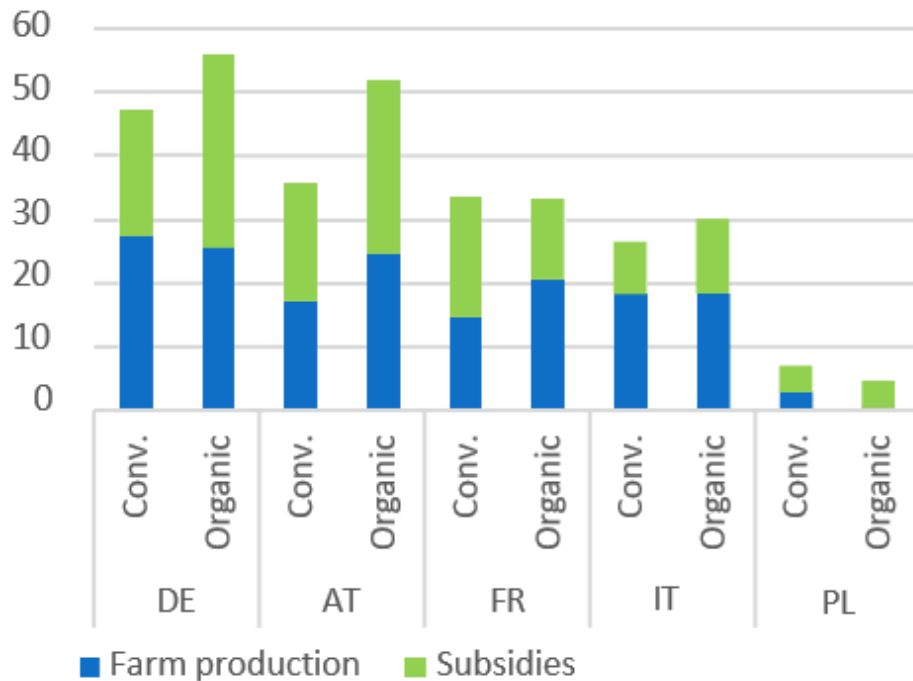


**Arable farms**, in 2015-2020, Source: EU FADN.

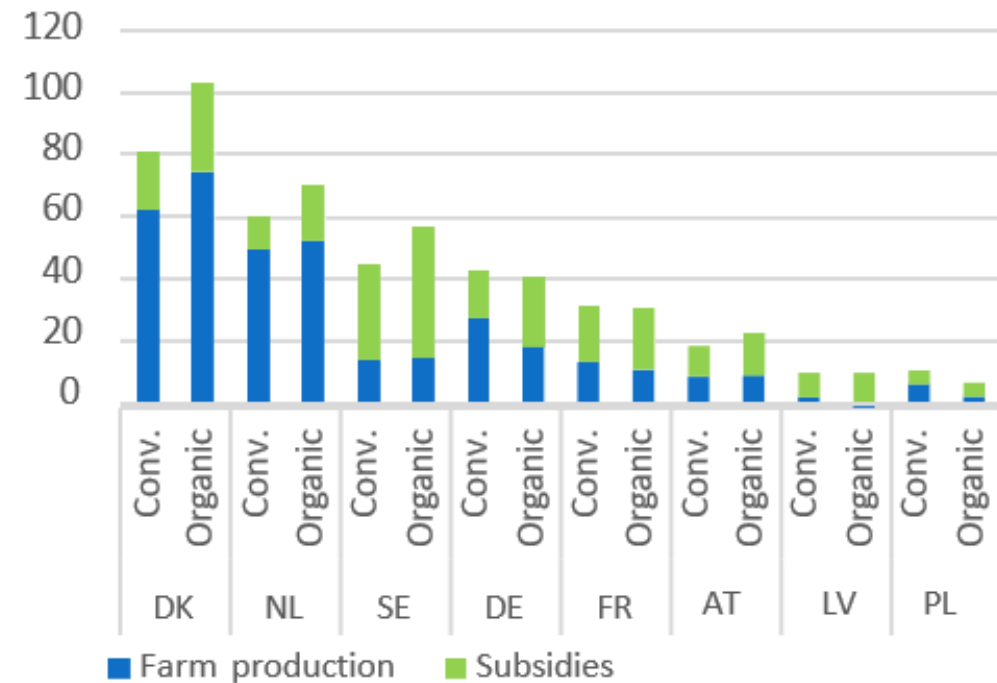


**Dairy farms**, in 2015-2020, Source: EU FADN.

# Farm net value added per worker for conventional and organic farms (thousand EUR/AWU)



**Arable farms**, in 2015-2020, Source: EU FADN.

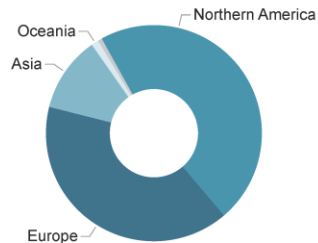


**Dairy farms**, in 2015-2020, Source: EU FADN.

# Organic retail sales in Europe in 2023



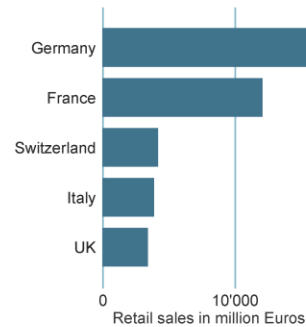
By continent, North America had the lead with 63.9 billion (bn) €, followed by Europe (54.7 billion €) and Asia (15.5 billion €).



Distribution of retail sales by region 2023



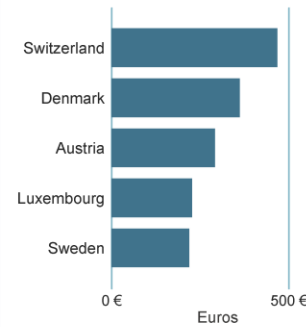
The European countries with the largest markets for organic food were Germany (16.1 billion €), France (12.1 billion €), Switzerland (4.2 billion €) and Italy (3.8 billion €) and UK (3.4 billion €).



The top 5 countries with the largest markets for organic food in 2023



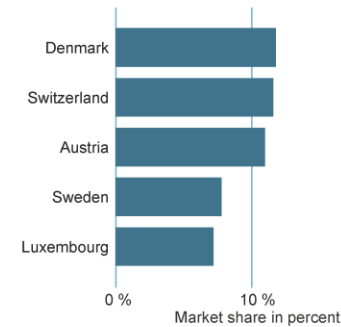
Switzerland had the highest per capita consumption worldwide, followed by Denmark, Austria, Luxembourg and Sweden.



Top 5 countries with the highest per capita consumption 2023



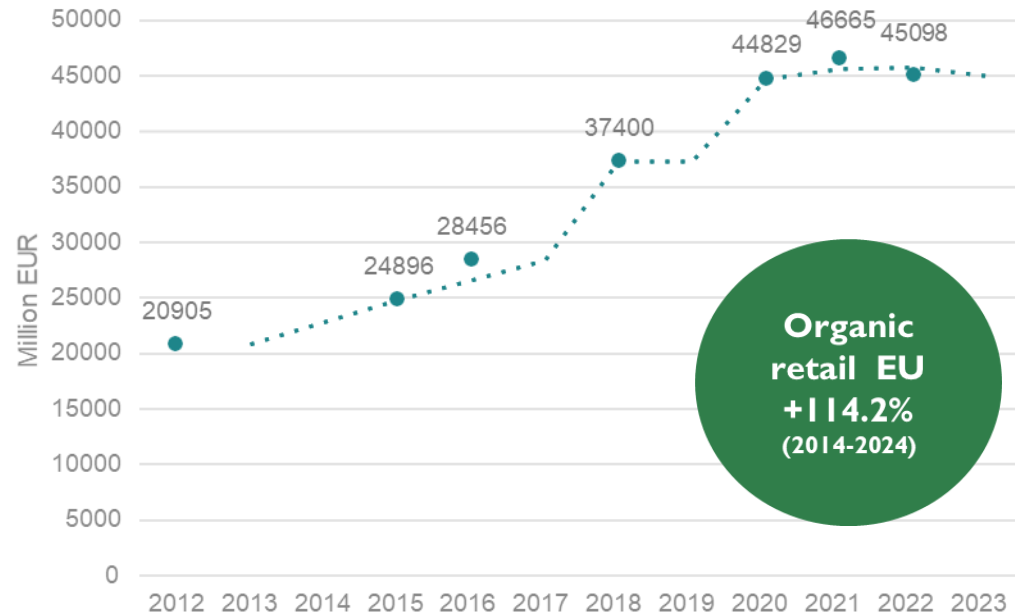
The highest organic share of the total market was in Denmark, followed by Switzerland, Austria, Sweden, and Luxembourg.



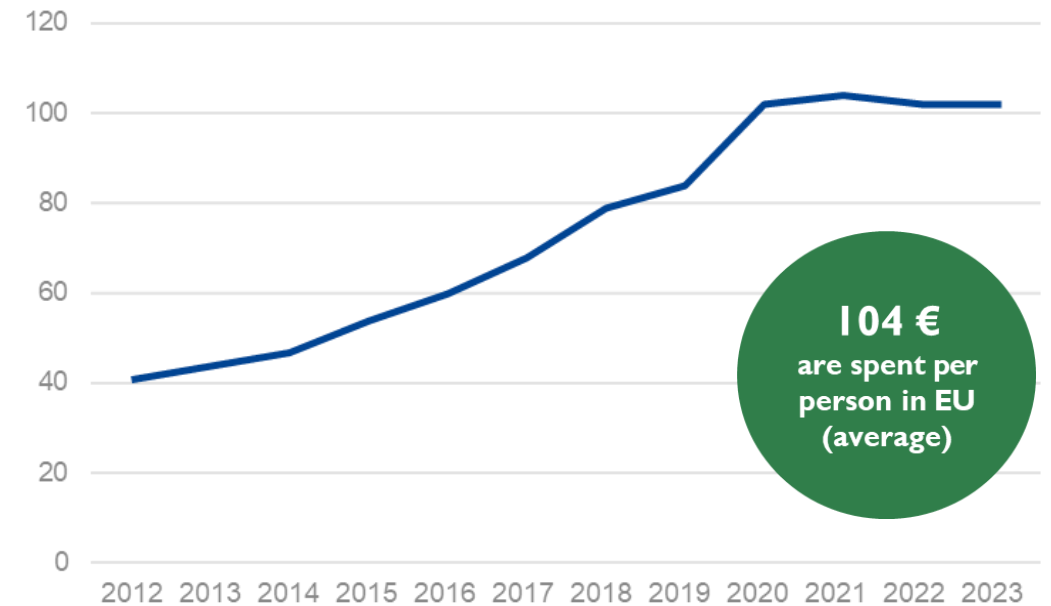
The 5 countries with the highest organic shares of the total market in 2023



# Organic market trends



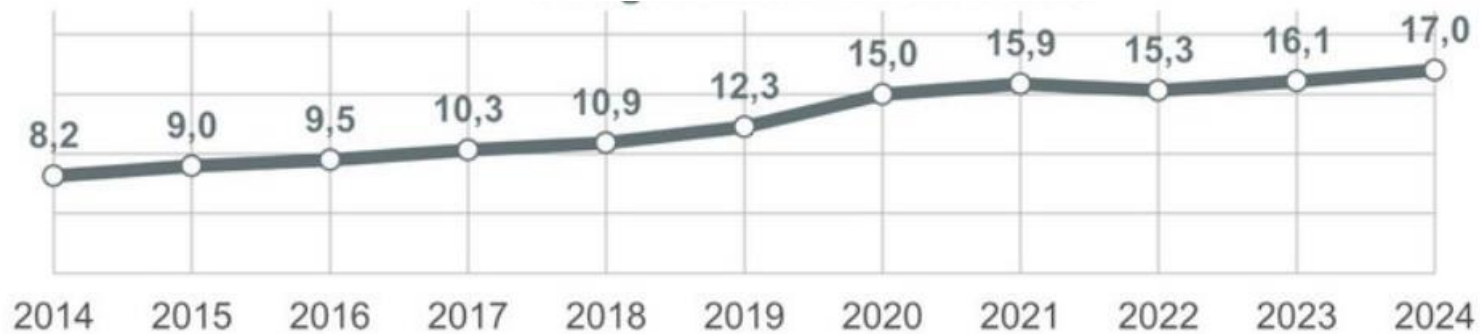
**Organic retail sales EU** 2000-2023 (Mio EUR),  
Source: FiBL



**Per capita consumption** in the EU (2012- 2023) in  
EUR, Source: FiBL

# Organic food market in Germany

Consumer spending on food and beverages in Billion EUR

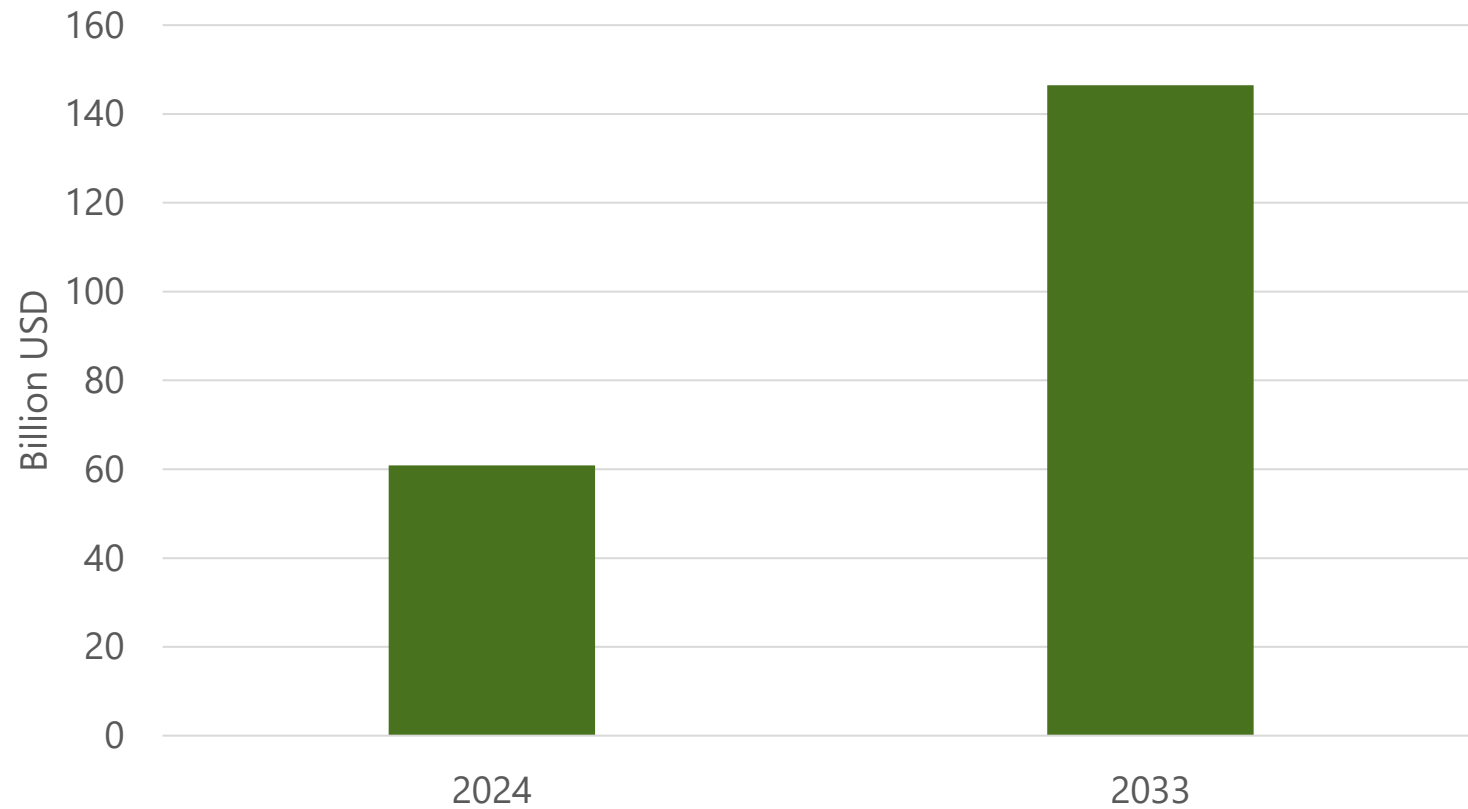


Organic sales shares



Source: AMI (2025)

# European Organic Food Market Forecast



Source: Europe Organic Food Market Size and Share Analysis - Growth Trends and Forecast Report 2025-2033



# Challenges of the organic food market



Price sensitivity

Communication of added value

Food safety and sustainability

Traceability

Quality assurance

Availability of raw materials  
-> resilience in the supply chain

Market fragmentation



# Who pays?





## Cost savings in organic arable production

<b>Lower nitrogen input</b>	<b>-100kg/ha</b>
<b>Lower energy input</b>	<b>- 50 %</b>
<b>Less GHG emissions</b>	<b>- 50%</b>
<b>More carbon sequestration</b>	<b>+ 270 kg/ha</b>

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<b>Less external costs</b>	<b>750 – 800 EUR/ha</b>
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Source: Hülsbergen (2023)

## Concluding remark

Organic farming makes **a major contribution** – for consumers, policy makers and society.

Organic farming must face up to the **challenges of the market**.

The profitability of organic farming depends on the remuneration of **public goods**.

A **new vision** contributes to strengthening the roots for a competitive and sustainable future.



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