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Report Highlights:

The upward trend of the organic food market in the European Union (EU) continues. EU organic sales reached record highs in 2020. The COVID-19 pandemic has become an additional driver in further boosting organic sales. There are continuing good prospects for U.S. organic product exports to the EU. USDA endorsed EU trade shows like BioFach, the world's largest organic trade fair, provide an excellent gateway for U.S. companies to establish contact with business partners. This report provides an overview of the EU market, policy, and trade related to U.S. organic exports.

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

Unless otherwise noted, "EU" in this report refers to the EU-27. Please note, that the United Kingdom (UK) left the EU Customs Union on January 1, 2021.

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Summary
On June 1, 2012, the United States (U.S.) - European Union (EU) organic equivalency arrangement went into effect. As a result, organic food and agricultural products certified in the United States or EU can be labeled and sold as organic in either market, streamlining trade between the world's two largest organic markets. In 2020, the EU market for organic food products increased by 15% reaching $52.5 billion. Germany and France remain the largest organic markets in the EU, representing more than 60% of its organic market. The growing demand for organics in the EU, combined with the equivalency arrangement creates trade opportunities for U.S. exporters. The EU offers market potential for U.S. organic sweet potatoes, fresh produce, dried fruit and nuts, specialty grains, and processed products. U.S. exporters will compete primarily on quality and price, but there are also good opportunities for innovative and premium products.

The COVID-19 pandemic has been an important driver further boosting organic sales. Starting in 2020, consumers changed their food purchasing and consumption habits during periods of "lockdown" when restaurants were closed, and home cooking became the norm. To take better care of themselves, when purchasing food at retail locations, consumers tended to purchase foods they viewed as good for their health. Surveys show that they also increasingly took into account sustainability when making their purchasing decisions. These factors positioned organic foods well during this time.

Without question, U.S. companies are profiting from the long-term growth of the EU organic market. Unfortunately, official trade data covers just a fraction of traded organic products as organic-specific Harmonized System (HS) codes are limited and exist for only specific commodities. Existing HS codes primarily cover organic fresh products like milk, fruits, and vegetables, but do not currently exist for most processed products or organic nuts. Total tracked U.S. organic exports to the EU reached record levels in 2017 and declined slightly in the following years. However, the actual total of U.S. exports of organic products to the EU is likely much higher.

BioFach, the world's largest organic trade show, offers a unique opportunity for both new-to-market players and established companies to meet new contacts, gather trade leads, and learn about the global organic market. BioFach 2022 will be held in Nuremburg Germany, July 26-29, 2022. BioFach is an USDA-endorsed trade show.

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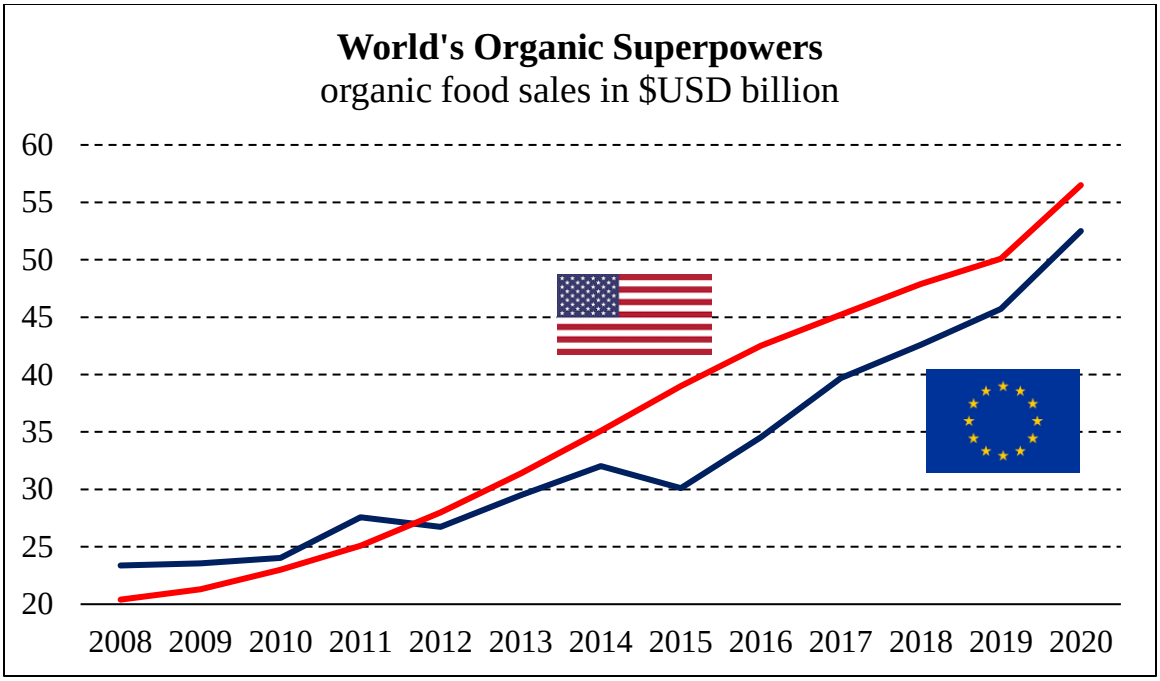
Section I. The EU Organic Agricultural Market and Production

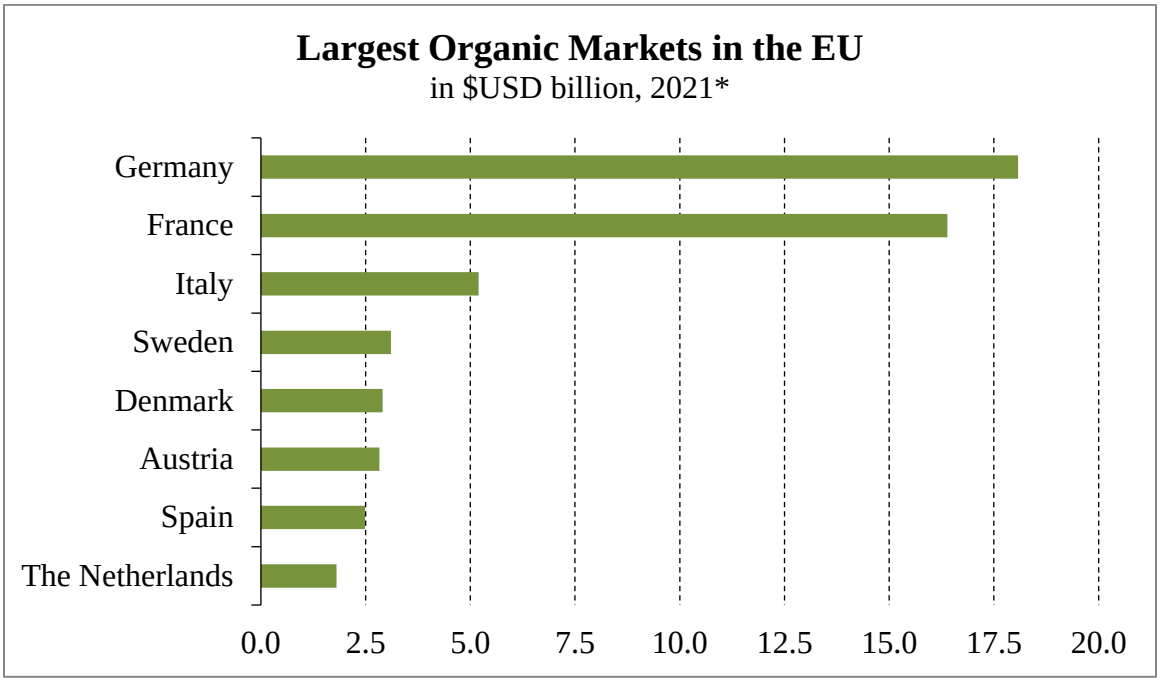
The United States and the EU are the world's first and second largest organic markets, respectively. Both have shown dynamic growth rates in the last few years with the United States overtaking the EU as the leading global organic food market in 2012. According to the Organic Trade Association (OTA), organic food sales in the U.S. increased by 13% to $56.5 billion in 2020. FAS offices in the EU estimate that the EU market totaled $52.5 billion in 2020, with a strong 15% increase over the previous year. Dynamic growth in both markets was fueled by the Covid-19 pandemic. For more information on the U.S. organic market please visit OTA's webpage.



Source: Organic Trade Association (OTA), USDA/FAS Posts in the EU, FiBL and Agricultural Market Information Company (AMI)

All leading organic markets in the EU demonstrated growth in 2020 and the trend is expected to continue. FAS posts in the EU estimate that organic food sales might increase by a more moderate 6%, hitting $56 billion in 2021. The largest markets continue to be Germany and France, which currently represent more than 60% of the total EU organic market. Note that France and Germany's share has increased considerably since the United Kingdom (UK) left the EU Customs Union on January 1, 2021.

Long-term growth of the EU organic market will be supported by Green Deal strategies of the EU Commission. Among other things, the Green Deal aims to fundamentally change the way EU agriculture operates and food is produced for, and provided to, EU consumers. For organics, the EU plans to boost production and consumption of organic products to reach a target of 25% of organic agricultural land in the EU by 2030. More information can be found in Section IV – Organic Policy in the EU.

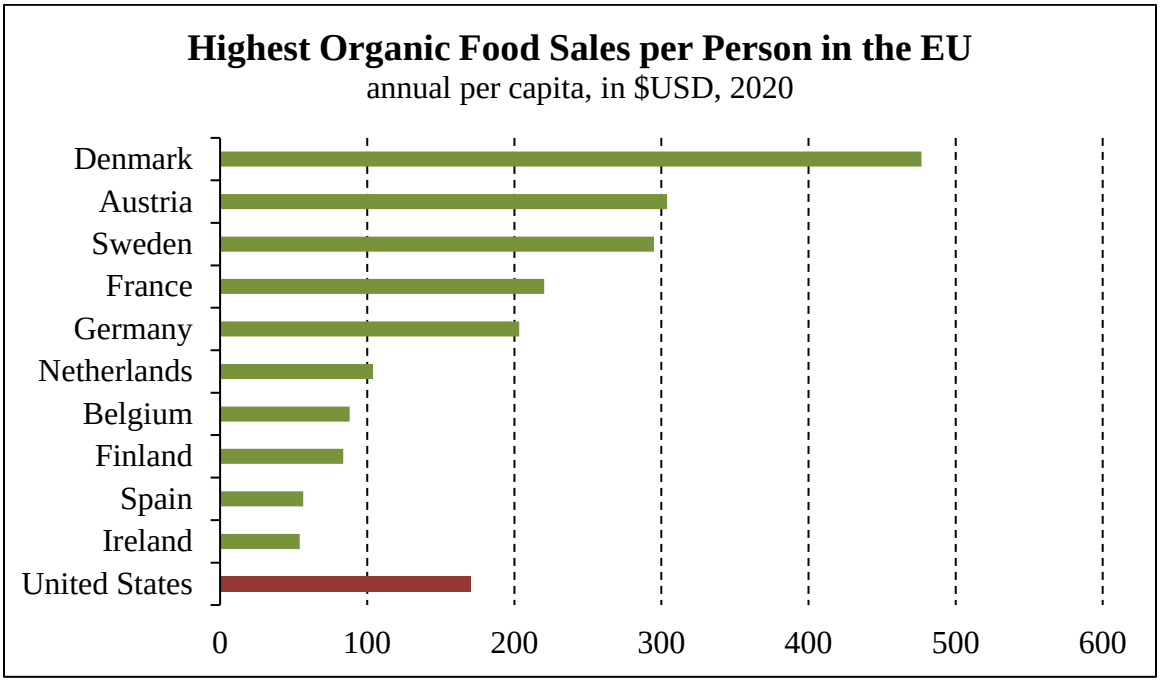


Source: FAS Posts in the EU, *FAS estimate

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

The COVID-19 pandemic has become an important driver to further boost organic sales. In particular, consumers in France, Germany, Italy, Austria, Spain and the Nordic countries changed their food purchasing and consumption habits during periods of “lockdown” when restaurants were closed, and home cooking became the norm. To take better care of themselves, when purchasing food at retail locations, consumers tended to purchase foods they viewed as good for their health. Surveys show that they also increasingly took into account sustainability when making their purchasing decisions. These factors positioned organic foods well during this time.

In 2020, the countries with the highest sales per person, per year of organic food and drinks (totaling $100 or more) were Denmark, Sweden, Austria, Luxembourg, France, Germany, and the Netherlands. At the same time, there were a dozen members states, mainly in Eastern Europe, with sales of less than $10 per person.

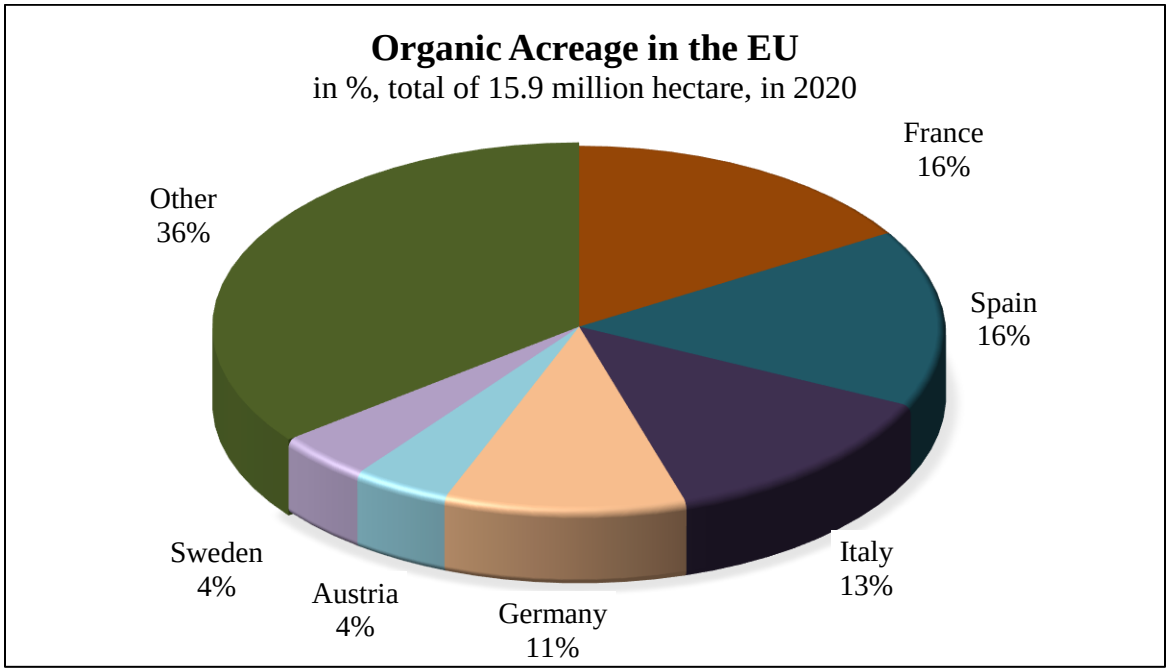


Source: Official country data, Country Organic Associations, FAS post estimate.

Consumers of organic products in Europe can be roughly divided into two groups. The first group, the so-called 'regular buyers,' is a rather small, committed group that has been buying organic products for decades. Although this group is small, they are responsible for almost half of the EU's organic sales. Regular buyers tend to buy at organic specialty shops or farmers' markets and price is not an important factor in making a purchasing decision.

The second, and much larger group, represents a different demographic. Double-income households with no children, older consumers (aged 50-75), and new-trend seekers fall into this group. They buy organic products for various reasons, including healthy lifestyle, food safety concerns, animal welfare, sustainability, quality, perceived taste, and innovative packaging. This so-called 'light buyers' group buy organic products both at full-service supermarkets and in specialty shops. Due to its size and diversity, it is this group that the organic industry should focus on to generate further growth in the near future.

The growing demand for organic products has led to an increase in organic production. Organic agricultural land in the EU has more than doubled in the past decade. The largest areas are in Spain, France, Italy, and Germany and together account for more than half of the EU organic area. Latest estimates show that in 2020, nearly 16 million hectares or 39 million acres were under organic agricultural management.



Source: Official country data, Country Organic Associations, FAS post estimate.

About 45% of organic agricultural land in the EU is used for permanent organic grassland, with France, Spain, and Germany comprising the largest areas. Another 40% of the organic area is used for arable crops. The largest arable crop groups are green fodder and cereal production with the largest areas found in Italy, Spain, and France. Finally, over 10% is being used to grow permanent crops, of which two-thirds is in Spain, Italy, and France. Most of this land is used for the production of olives, grapes, and nuts. The proportion of agricultural land farmed organically differs widely between EU Member States. The highest share of area dedicated to organic farming is reported in Austria, followed by Sweden, Italy, Czech Republic, Finland, Denmark, and Germany.

Section II. Exports of U.S. Organic Food

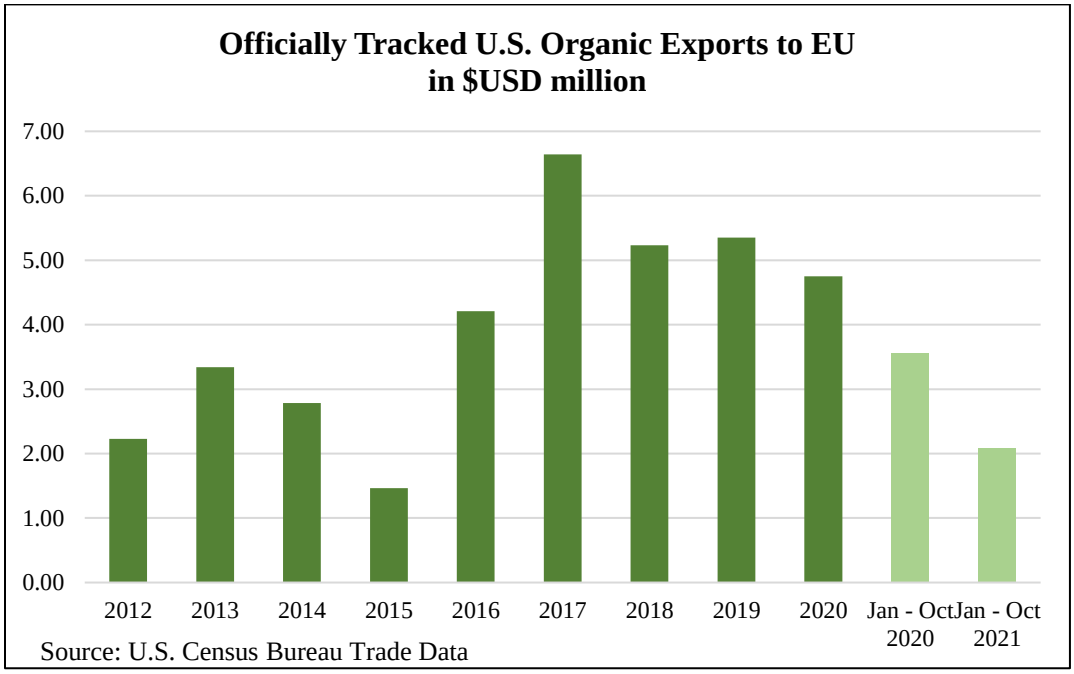
In 2020, global U.S. organic food exports were officially valued at $647 million. Canada and Mexico are still by far the largest markets followed by Japan, South Korea, and Taiwan. Note that tracking of organic food exports only began in 2011 and the current "Harmonized System" (HS)[1] codes for organic products cover only a fraction of total organic trade (in the following text referred to as "select U.S. organic exports"). Existing HS codes primarily cover organic fresh products like milk, fruits, and vegetables, but do not currently exist for most processed products or organic nuts. Actual U.S. exports of organic products globally are estimated to be much higher.

The source of the following trade data is the U.S. Census Bureau Trade Data retrieved from USDA's Global Agricultural Trade System Online (GATS). Please see the Annex for further information on the HS tariff codes for organic products.

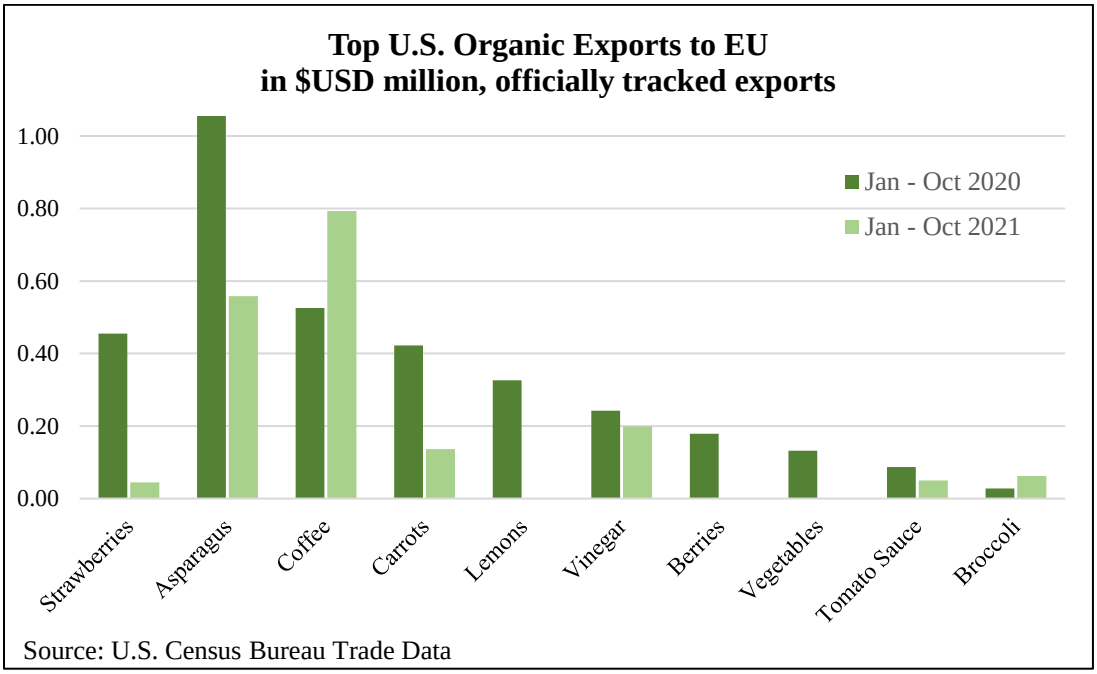
[1]The Harmonized Commodity Description and Coding System, also known as the Harmonized System (HS) is a standardized international system to classify traded products.

Select U.S. Organic Exports to EU

In the first ten months of 2021, select U.S. organic exports to the EU declined by about 41% due to significantly lower exports of fresh strawberries, asparagus, and carrots. However, export numbers may still partially catch up in the last two months of the year since the reported period does not include the winter holiday season where consumers tend to spend more money on expensive food products. Covid-19 related global shipping and delivery problems might also have contributed to the export decline.



In the first ten months of 2021, the top U.S. organic products exported to the EU were organic asparagus, coffee, strawberries, carrots, lemons, vinegar, berries, vegetables, tomato sauce, and broccoli. In 2020, organic fresh strawberries were the highest USD export in terms of value of all tracked organic products, followed by asparagus and coffee. In 2021 (January – October) organic coffee, broccoli, pears, and tomatoes showed significant increases in export value compared to the same period in 2020, albeit pears, and tomatoes at a rather low level. The United States' top organic product exports to the EU change every year. This is due to price fluctuations and the supply situation in the United States, as well as a fluctuating demand in the EU. In general, this is also more characteristic of the fresh food market than for processed food. Good opportunities exist for fresh produce during the European winter, when there is only limited and expensive production in green houses.



The Netherlands and Germany are the largest EU importers

As of January 2021, the UK, who used to be the largest importer of select U.S. organic products, exited the European Customs Union. After the UK's exit, the Netherlands, is by far the largest importer of U.S. organics within the remaining EU-27 followed by Germany and Belgium. These three countries together accounted for some 87% of U.S. organic imports by the EU in 2020. Major EU importers act as distributors and transship organic products to other EU Member States.

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

The EU and the United States signed the EU-U.S. Organic Equivalency Arrangement in 2012. Under the Arrangement, the EU recognizes the USDA National Organic Program (NOP) as equivalent to the EU Organic Program (under applicable EU regulations) and allows U.S. organic products to be marketed as "organic" in the EU using the EU organic logo. The Arrangement is limited to organic products of U.S. origin, either produced within the U.S. or where the final processing or packaging occurs within the United States. Since 2012, this partnership has streamlined trade between the two largest organic producers in the world. It provides organic farmers and businesses access to a $109 billion and growing combined market. More information can be found here: https://www.usda-eu.org/trade-with-the-eu/trade-agreements/us-eu-organic-arrangement/

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

as those of the Union." Currently, Chile is the only country that has signed an Agreement with the EU on trade in organic products.

Section IV. Organic Policy in the EU

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

Scope

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

Labeling

There are no significant changes to the labeling rules in the 2018 Regulation. The term "organic" and all its derivatives or diminutives such as "bio" and "eco" may be used only to label products that comply with EU organic production rules and if at least 95% of the ingredients of agricultural origin are organic. For products containing less than 95% organic ingredients, the term "organic" may be used only to indicate individual organic ingredients in the list of ingredients. When reference is made to the organic production method in the ingredients list, the total percentage of organic ingredients must be indicated. Products containing genetically modified organisms (GMOs) or produced with GMOs cannot be labeled as organic.

The use of the EU organic logo is mandatory on all pre-packaged organic products produced in the EU. Organic products imported from non-EU countries may carry the EU organic logo if they comply with EU production rules. When the EU organic logo appears on the label, the indication of the place of farming is required. This indication may be classified as 'non-EU Agriculture,' where the agricultural raw material has been farmed outside of the EU. However, 'non-EU' may be replaced or supplemented by the name of a country, or by the name of a region if all of the agricultural raw materials of which the product is composed have been farmed in that region.

Food production
The 2018 Organic Regulation introduced stricter rules for the use of natural flavoring in organic food preparations. Under Regulation 2018/848, only natural flavorings originating from the mentioned ingredients can be used in organic processing. For example, only 'natural strawberry flavoring' is allowed, which means that the flavoring must be at least 95% obtained from strawberries. In this case, strawberry extracts are allowed. Under the new Organic Regulation, flavorings are regarded as agricultural ingredients. This means that the maximum permissible amount of conventional flavorings in an organic product, together with all other non-organic ingredients, shall not exceed 5% of the total agricultural ingredients.

Regulation 2018/848 also limits the use of additives and processing aids to produce food and feed. Only certain products and substances are authorized for use in the production of processed organic food and feed, alongside yeast. The list of products and substances that may be used in the production of organic processed products is listed in Part IV of Annex II of the Regulation.

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

The EU Farm to Fork Strategy
The European Commission announced the Farm to Fork Strategy to enhance food and agricultural sustainability by 2030 under the EU Green Deal. The Farm to Fork Strategy marks the beginning of a multi-step legislative development process that aims to fundamentally change the way EU agriculture operates and food is produced for, and provided to, EU consumers. The Farm to Fork Strategy will need to be converted into legislative proposals with the European Parliament and member states shaping and amending these proposals as part of the EU legislative process. Legislative negotiations between EU institutions typically take several years to complete. For more information on Farm to Fork, please see the GAIN report Green Deal Strategies for the EU Agri-Food Sector Present a Politically Ambitious Policy Roadmap.

Section V. Trade Opportunities for U.S. exporters on the EU organic market
The growing market for organic products in the EU combined with the U.S.-EU equivalence arrangement has created more opportunities for U.S. exporters. Generally, U.S. commodities and ingredients compete on price and quality, however, finding niches for innovative and premium packaged products is also possible. There is a strong preference for local and regional foods over imported food in the EU. As a result, commodities where there is no local/regional alternative may be more successful. There are opportunities for U.S. exporters in the following markets:

- The market for **sweet potatoes** is growing. EU demand for potato varieties is high. The United States is the best year-round supplier of sweet potatoes at competitive prices.
- There is a market for **fresh vegetables** like carrots, onions, broccoli, and lettuce, particularly in the Netherlands.
- **Processed vegetables** are in demand in the Nordic region due to limited local availability.
- **Pulses**, especially beans and lentils, are increasingly becoming popular in north-western Europe because of a growing demand for healthy food products. Local supply is not meeting the demand.
- In countries with no local availability, there is demand for a great variety of **fresh fruit** from the United States. There is seasonal (October through March) demand for apples and pears in north-western and central Europe. Demand in the same region is also strong for U.S. citrus (grapefruit and tangelos). There is year-round growing demand for fresh, dried, sweetened cranberries. There is also growing demand for other fruits such as grapes, strawberries, and cherries.
- Driven by the healthy snack and baking industry, there is a strong growing demand for **tree nuts** from the United States, especially for hazelnuts, pecans, almonds, walnuts, and pistachios.
- Growing consumer awareness and, therefore, demand for **specialty grains** is also increasing. High interest from the baking industry adds to this demand.
- Demand for U.S. **organic processed products** is especially high in Germany, and the Nordic region. Consumers are increasingly looking for healthy snacks (cereal/nut bars), organic confectionary products, maple sugar and syrup, and organic beverages.

Single Country Reports
There are country reports on the organic market in EU Member States. They can be downloaded from the FAS website and contain country specific market information under the following link: https://fas-europe.org/reports/

VI. Market Development

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

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

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

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

Fruit Logistica (https://www.fruitlogistica.com/en/) is a regional (European) trade show that also attracts buyers of organic fresh produce, nuts, and dried fruits. This show is also USDA-endorsed with an U.S. pavilion.

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

There are also numerous regional organic shows throughout Europe. For example, Bio Beurs is the leading organic event in the Netherlands where mostly Dutch suppliers exhibit their latest food products and technologies. If you are interested in one of the regional shows, please contact the responsible FAS office for more information. (www.fas-europe.org/countries/)

Finally, trade shows like ANUGA or SIAL attract mainly buyers of specialty and retail-ready products and are therefore best suited for exporters of U.S. organic processed products like confectionary products, snacks, and baby food. More detailed information about the 2022 USDA-endorsed shows in Europe can be found at www.fas-europe.org

VII. Post Contact and Further Information

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

FAS/Washington http://www.fas.usda.gov/
USDA/FAS/Europe http://www.fas-europe.org/
U.S. Mission to the European Union https://www.usda-eu.org/

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

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Home Page: www.fas-europe.org

Annex

Current list of U.S. organic export HS codes

The first selected organic HS[2] codes were introduced in 2011 in the Harmonized Tariff Schedule of the United States has not been able to keep up with the ever-expanding list of organic products available on the global market. As a result, there is a gap between actual trade and the data associated with HS organic codes. There is a different set for exports and imports of organic products. Less than four dozen organic products for U.S. exports have their own classification coding; everything else is not categorized as organic in this system. Over the years, the list of organic product groups tracked in the HS system has been expanded. The latest additional organic HS codes were introduced in 2018. Despite these shortcomings, the HS system provides a useful tool for tracking covered products and to track the export dynamics for those specific products.

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

HS Commodity Code	Aggregate Name	Start Date
701900070	Organic Potatoes Fr/Ch Xsd Oth	1/1/2011
702000015	Organic Cherry Tomato Fr/Ch	1/1/2011
702000025	Organic Roma Plum Tomato Fr/Ch	1/1/2011
702000035	Organic Tomato Other Fr/Ch	1/1/2011
703100010	Organic Onion Sets Fr/Ch	1/1/2011
704100010	Organic Cauliflower Fr/Ch	1/1/2011
704904025	Organic Broccoli Fr/Ch	1/1/2011
705110010	Organic Head Lettuce Fr/Ch	1/1/2011
709400010	Organic Celery Fr/Ch	1/1/2011
709600010	Organic Peppers Fr/Ch	1/1/2011
709700010	Organic Spinach Fr/Ch	1/1/2011
805100045	Organic Oranges Fr/Dr	1/1/2011
805502010	Organic Lemons Fr/Dr	1/1/2011
806100010	Organic Grapes Fresh	1/1/2011
808100010	Organic Apples Fresh	1/1/2011
810100010	Organic Strawberries Fresh	1/1/2011
810400026	Organic Cult Blueberries Fresh	1/1/2011
901210010	Organic Coffee Roast Not Decaf	1/1/2011
2103204010	Organic Tomato Sauce Ex Ketchp	1/1/2011
704902010	Organic Cabbage Fr/Ch	1/1/2012
707000010	Organic Cucumbers Fr/Ch	1/1/2012
805400010	Organic Grapefruit Fresh	1/1/2012
808300010	Organic Pears Fresh	1/1/2012
809290010	Organic Cherries Fresh	1/1/2012
705190020	Organic Lettuce Not Head Fr/Ch	1/1/2015
705190030	Organic Lettuce Not Head Fr/Ch	1/1/2015

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

705190040	Organic Lettuce Not Head Fr/Ch	1/1/2015
706103020	Organic Carrots Fr/Ch	1/1/2015
706103030	Organic Carrots Fr/Ch	1/1/2015
706903100	Organic Beet Fr/Ch	1/1/2015
708101000	Organic Peas Fr/Ch	1/1/2015
709202000	Organic Asparagus Fr/Ch	1/1/2015
805505010	Organic Limes Fr/Dr	1/1/2015
807111000	Organic Watermelon Fresh	1/1/2015
809301000	Organic Peach/Nectarin Fresh	1/1/2015
810202000	Organic Berries Fresh	1/1/2015
401201000	Organic Milk	7/1/2016
2005100010	Organic Vegetables Prep/NT FZ	7/1/2017
2007100010	Organic Fruit Prep	7/1/2017
2209000010	Organic Vinegar and Substitutes	1/1/2018

Source Notes: United States' export and import statistics on the above-mentioned organic products can be obtained through the USDA's Global Agricultural Trade System Online (GATS): http://www.fas.usda.gov/gats/default.aspx by running a standard query and selecting "Organics-Selected" under "Product Groups".

Attachments:

No Attachments.