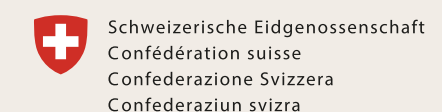




Welcome to our 1st Webinar: Building our Community of Practice – Organic Market Insights

16.04.26

InnOFoodLabs project is funded by the European Union (Grant no. 101181923) and by the Swiss State Secretariat for Education, Research and Innovation (SERI). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union, REA or SERI. Neither the European Union, nor REA nor SERI can be held responsible for them.





Today's Program 16:30 – 18:00

1

Introduction to InnoFoodLabs

Ivraina Brändle, *FiBL*

2

What does the Community of Practice need?

Eduardo Ruiz Velasquez, *University of Kassel*

3

Organic Market Insights

Évelyne Alcázar Marín, *Ecovalia*

Katrin Zander, *University of Kassel*

Photo credits: Claire Berbain





InnOFoodLabs

Innovative, locally-driven Organic Food Labs

Project team at Kick-off Meeting



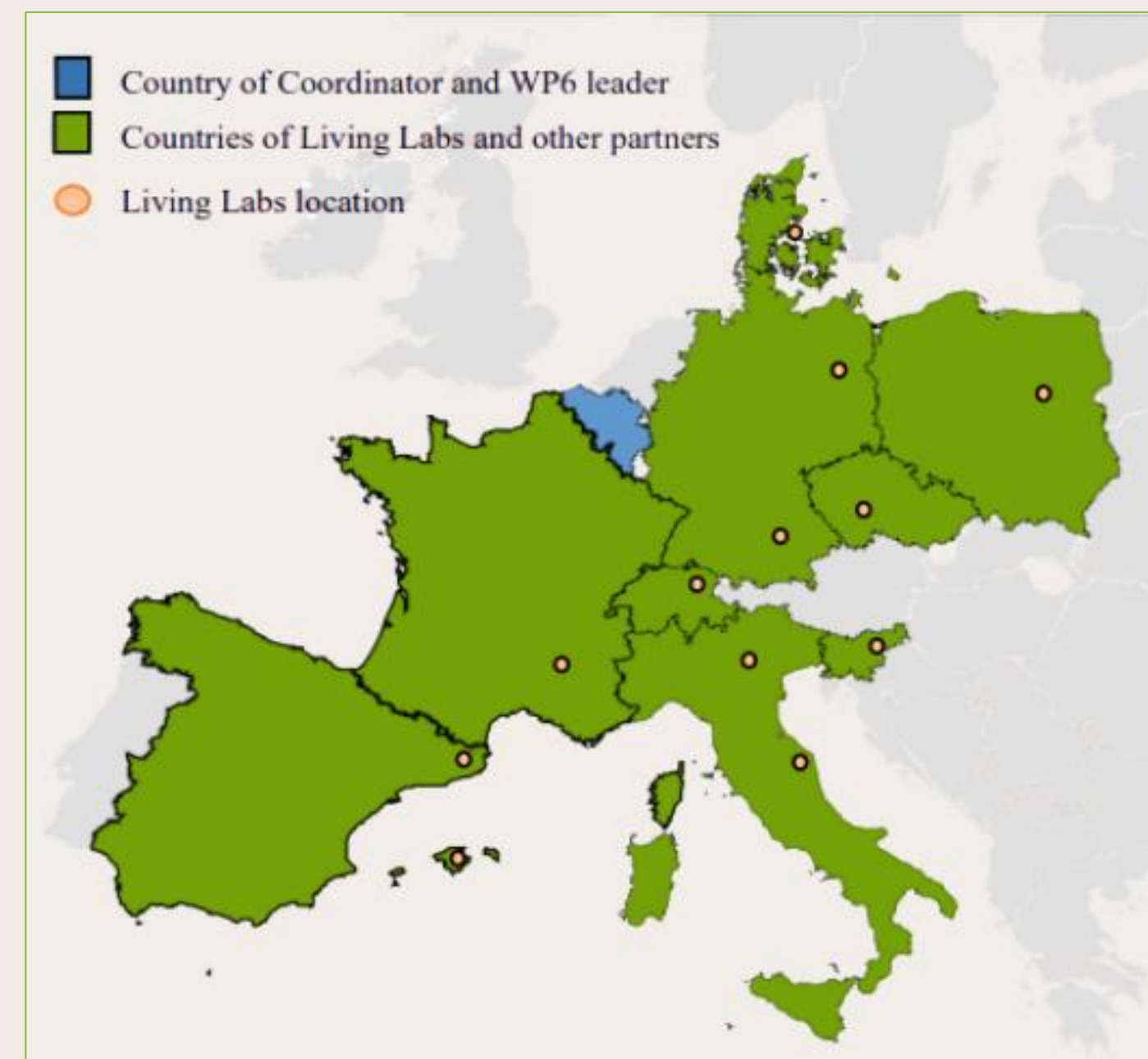
- Start: 01/09/2025
- End: 31/08/2029 (48 months)
- The project will promote **23 innovations** in **organic food value chains** through **12 Living Labs** across **9 European countries**

“InnOFoodLabs creates new market opportunities for organic farmers and operators through better processing, distribution, retail, and marketing”



Community of Practice (CoP): Capacity building & knowledge transfer

Who?





Project partners



Jihočeská univerzita
v Českých Budějovicích
University of South Bohemia
in České Budějovice



SZKOŁA GŁÓWNA
GOSPODARSTWA
WIEJSKIEGO



UNIVERSITÀ
POLITECNICA
DELLE MARCHE



Who is participating today?

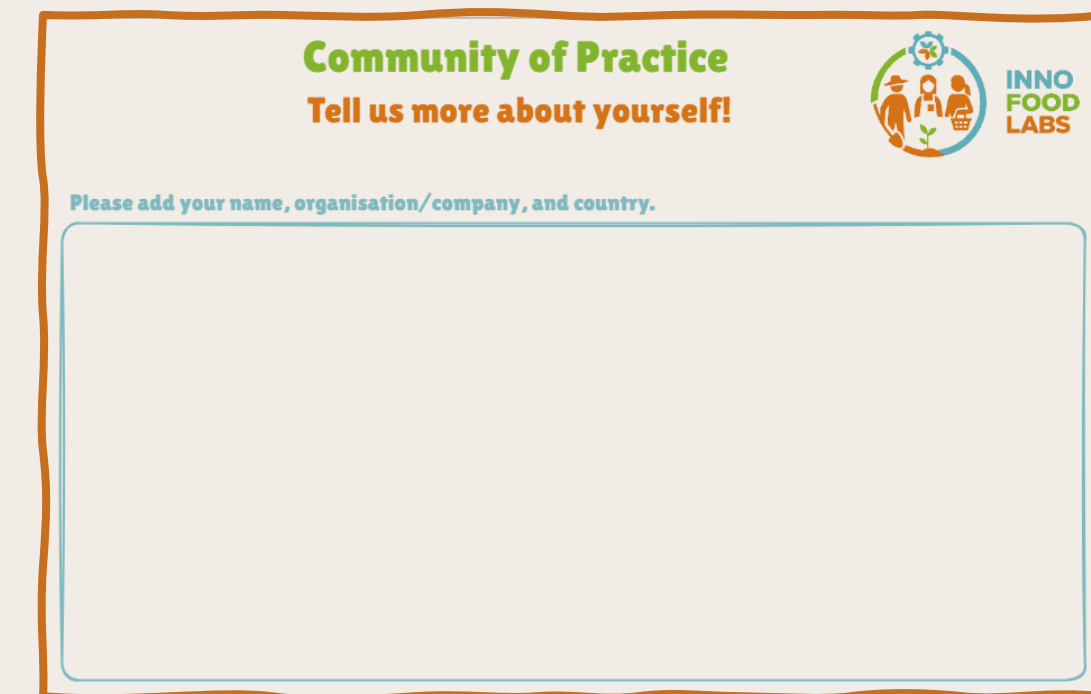
Find the **link to Excalidraw** in the chat.

Please enter your name and "join as a guest" to access.

In the Excalidraw frame "Tell us more about yourself!" please add your:

- **Name**
- **Organisation**
- **Country**

Example: Ivrainna Brändle / FiBL / Switzerland



Organic Market Experts



Évelyne Alcázar Marín
Coordinator & Brussels office Director
Ecovalia



Prof. Katrin Zander
Head of section Agricultural and Food Marketing
University of Kassel



Organic Market Insights SPAIN

Speaker: Évelyne Alcázar Marín



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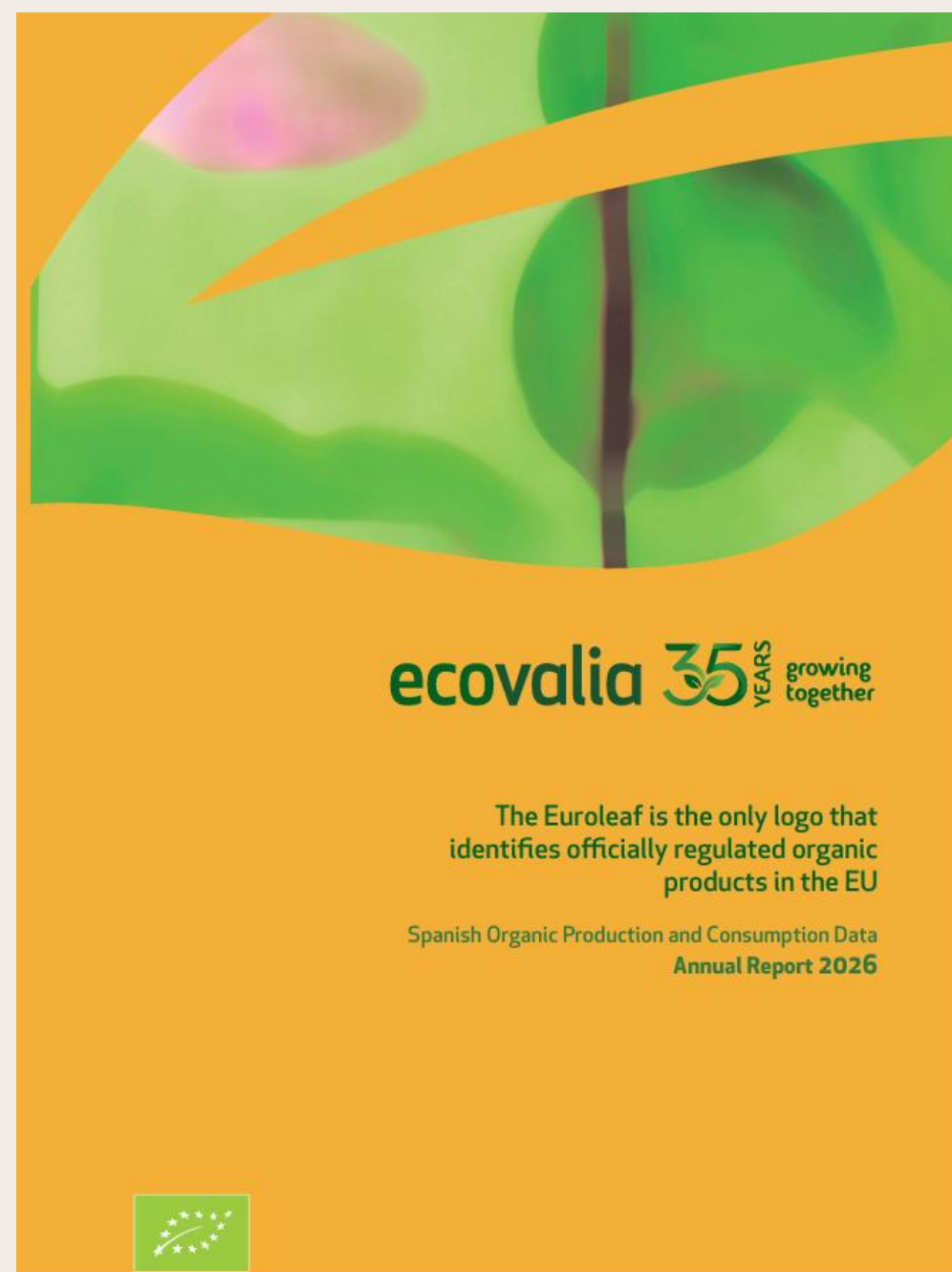
**Funded by
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Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

FiBL

Input: Organic Market Insights SPAIN



Organic surface in Europe (2024)

SURFACE SHARE IN
EUROPE

19.6 M ha

GROWTH

5 YEARS (2019-24) **19%**

10 YEARS (2014-24) **69%**

SPAIN

2,944,904 ha

FRANCE

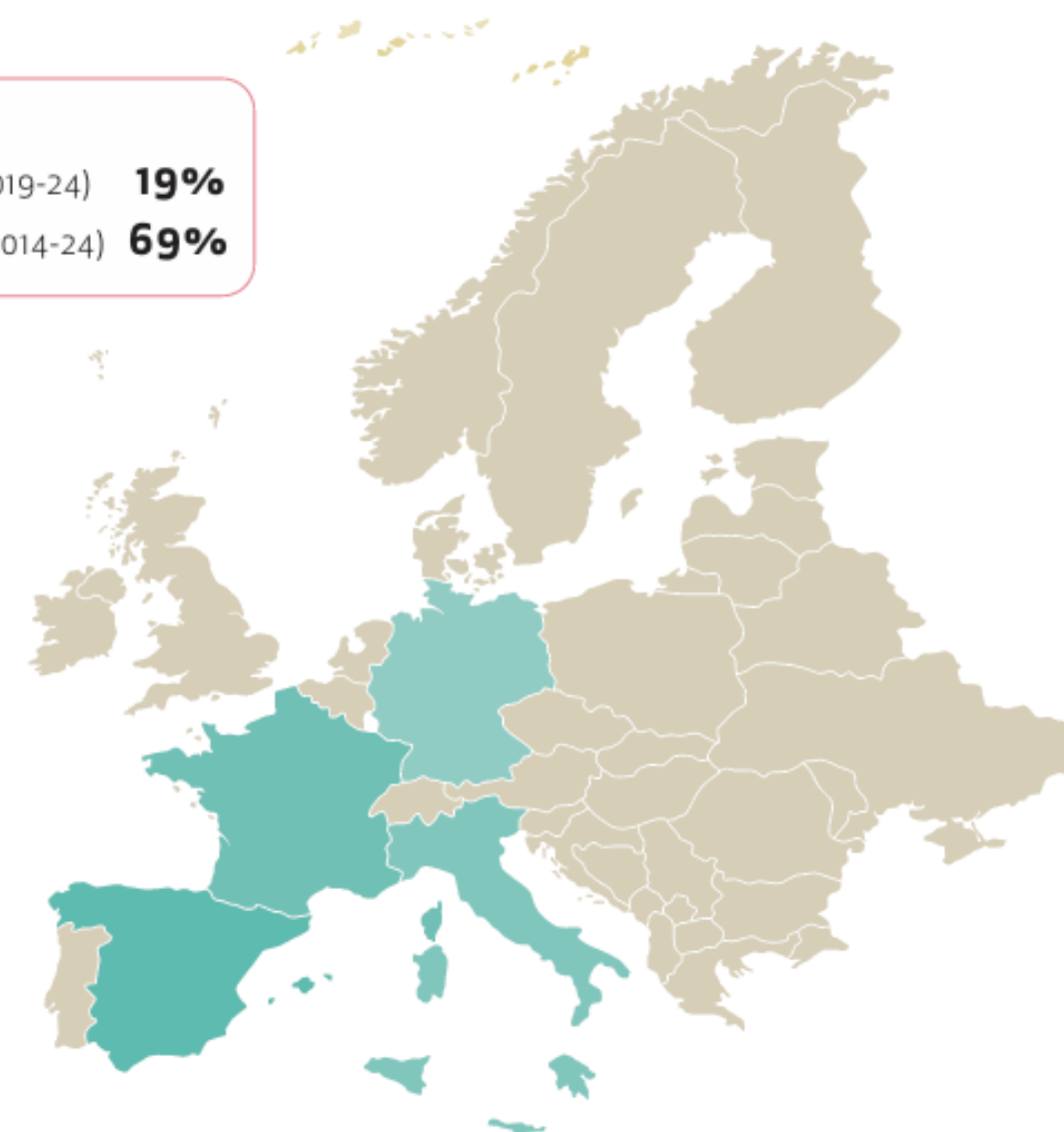
2,711,567 ha

ITALY

2,514,551 ha

GERMANY

1,913,212 ha

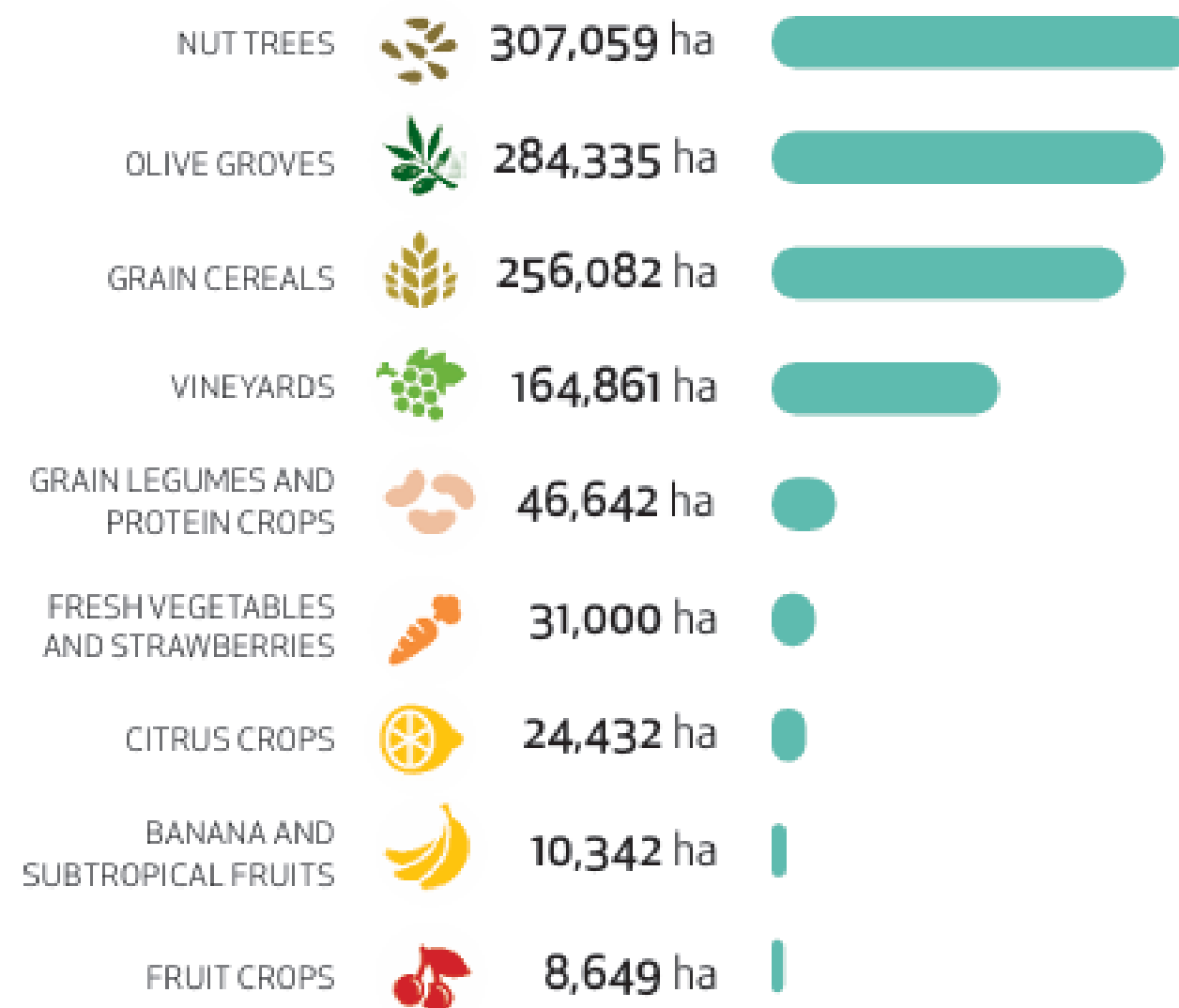


Source: Ecovalia, based on "The World of Organic Agriculture 2026" (FiBL and IFOAM Organics International)

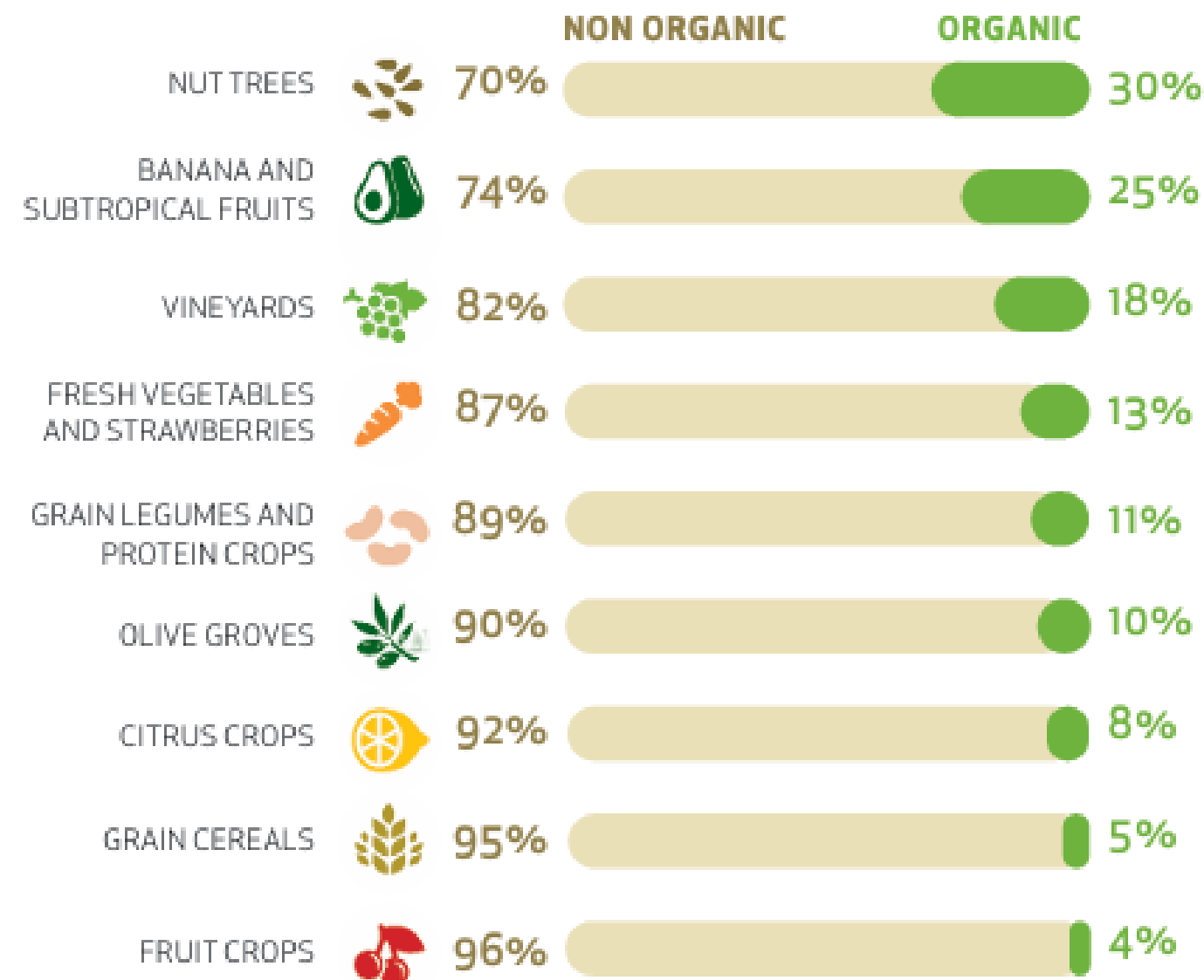
Input: Organic Market Insights SPAIN

Organic crops (2024)

MAIN ORGANIC CROPS



NON ORGANIC/ORGANIC RATIO FOR MAIN CROPS

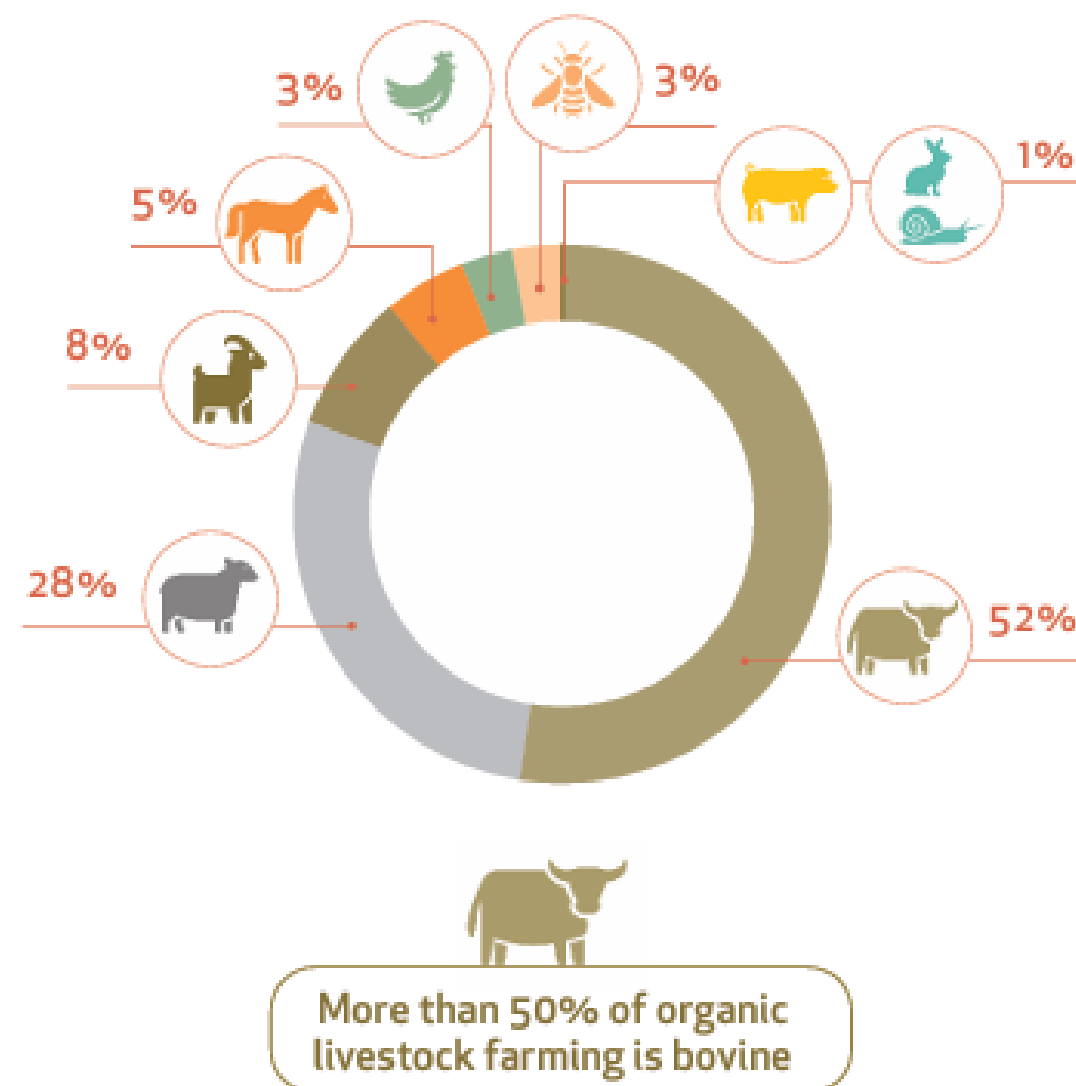


Source: Ecovalia, based on data from Ministry of Agriculture, Fisheries and Food (MAPA), 2024

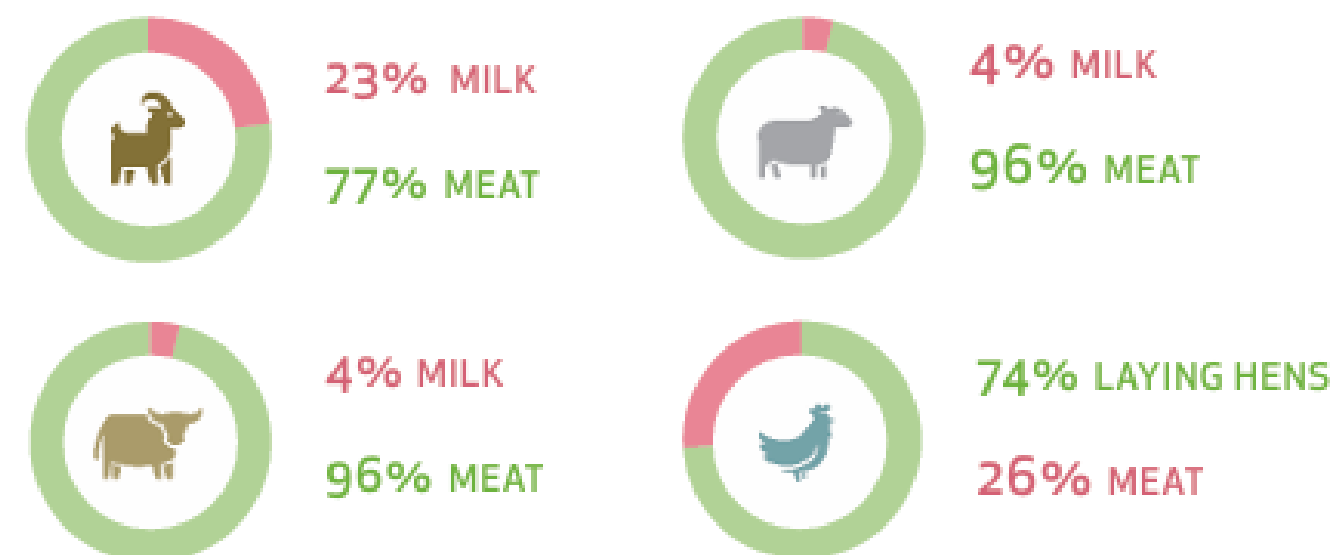
Input: Organic Market Insights SPAIN

Organic Livestock (2024)

ORGANIC LIVESTOCK CATEGORIES



MEAT VS MILK/EGGS PRODUCTION ANIMALS



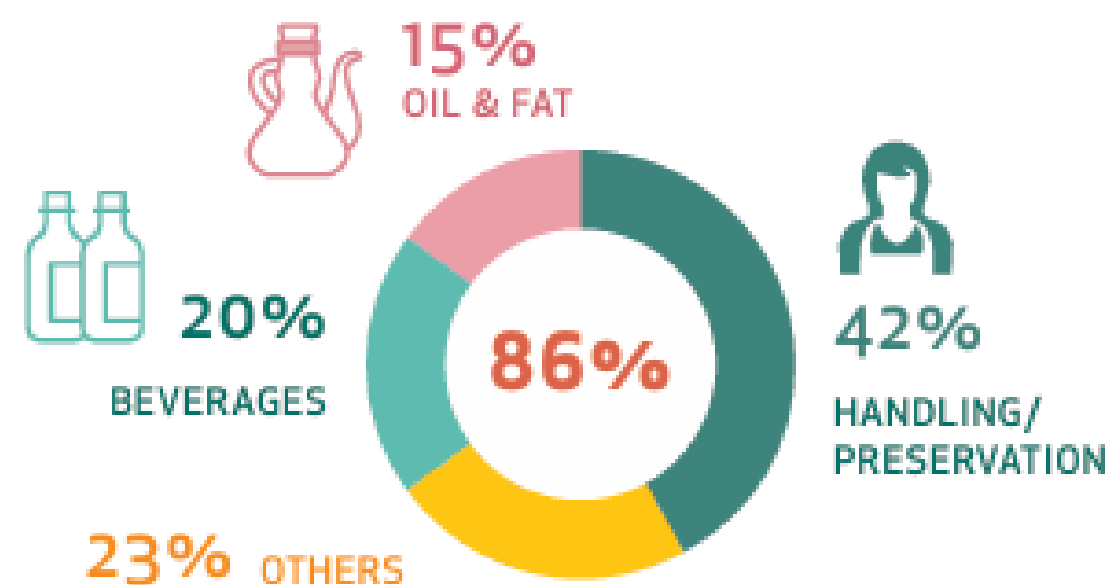
LIVESTOCK FARMS AND AQUACULTURE

Bovine	5,829
Ovine	3,028
Goat	871
11,164	

Source: Ecovalia, based on data from Ministry of Agriculture, Fisheries and Food (MAPA), 2024

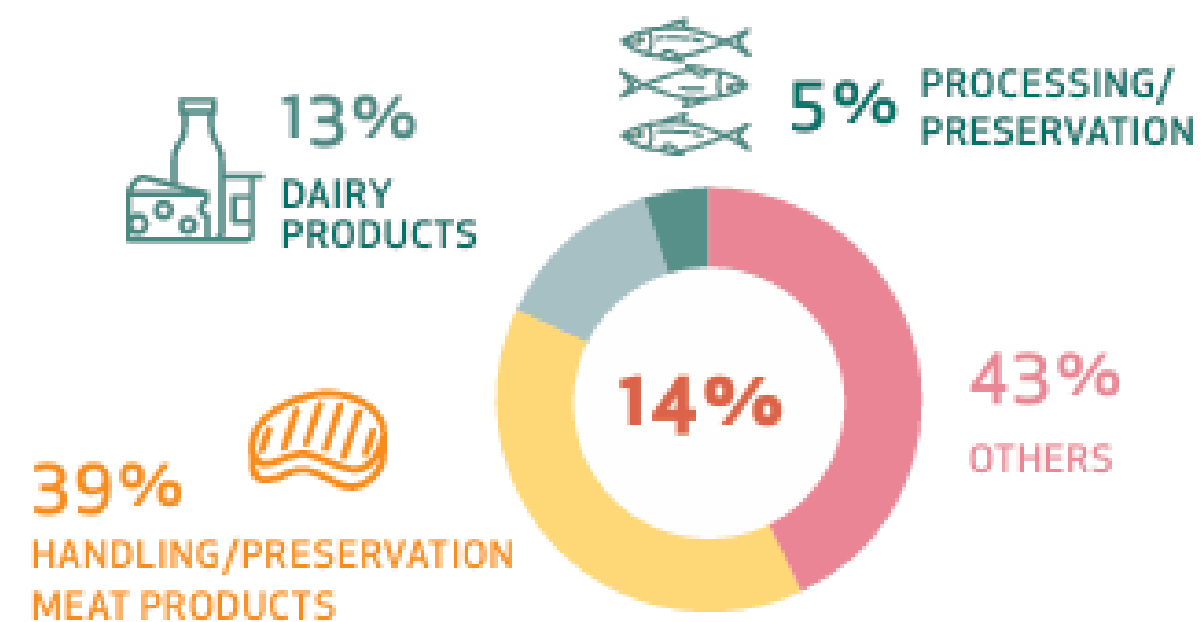
Organic Business (2024)

VEGETABLE PROCESSING ACTIVITIES



Last year variation **-3,5%**

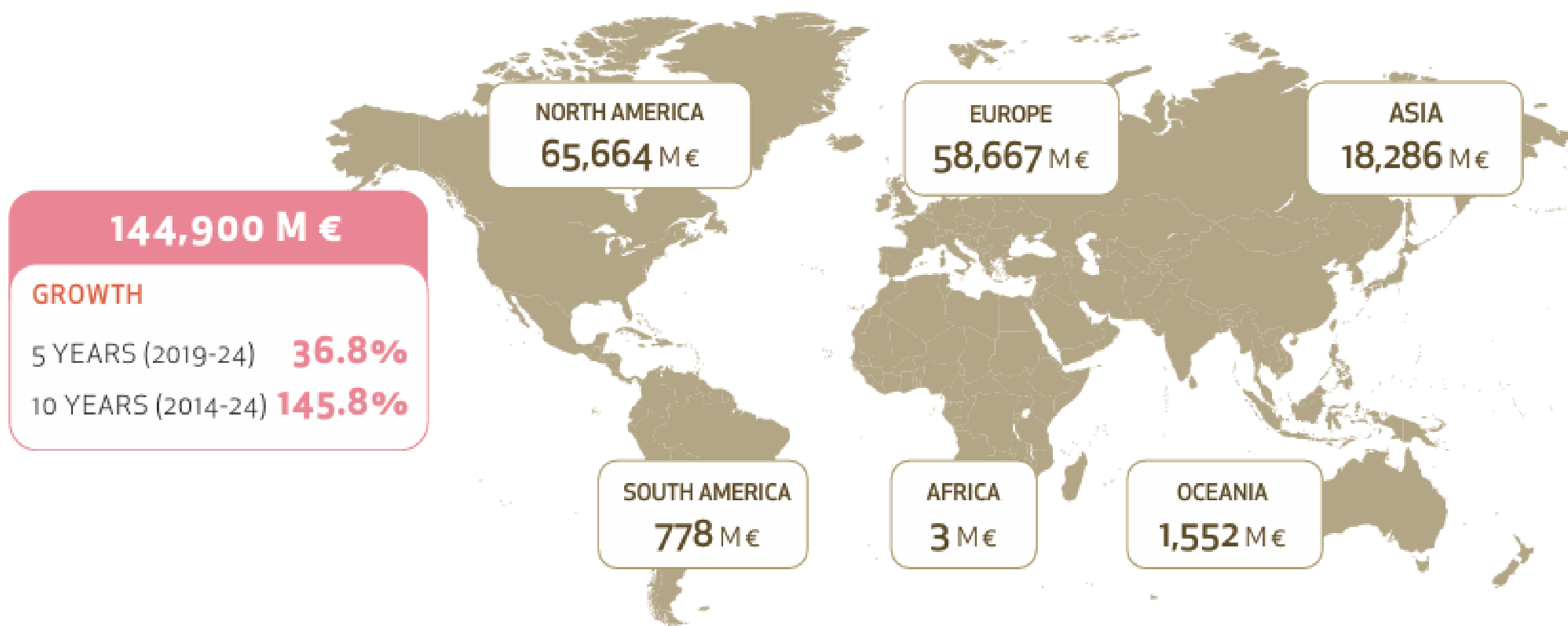
ANIMAL PROCESSING ACTIVITIES



Last year variation **-4,8%**

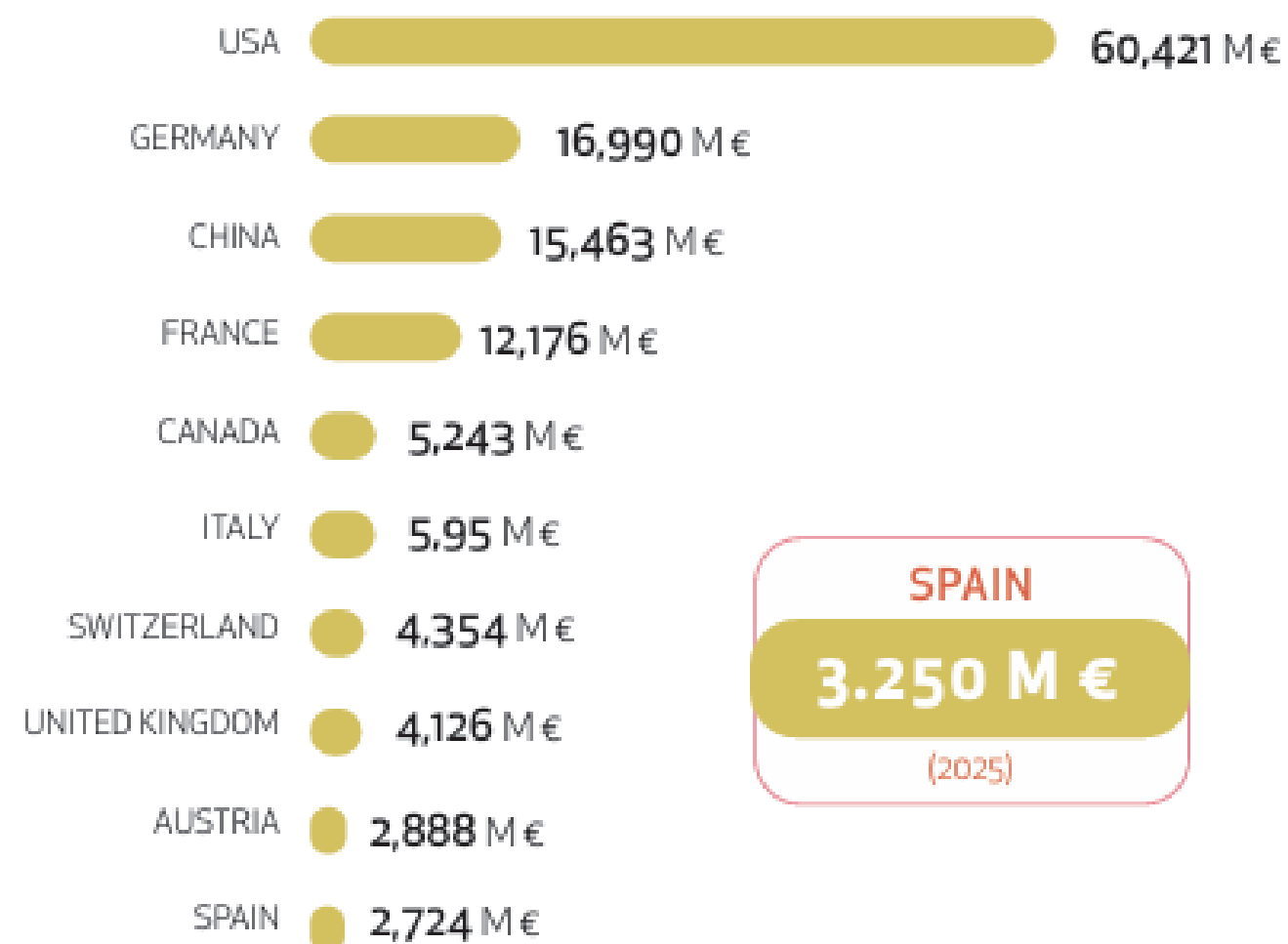
Source: Ecovalia, based on data from Ministry of Agriculture, Fisheries and Food (MAPA), 2024

Organic World Consumption (2024)

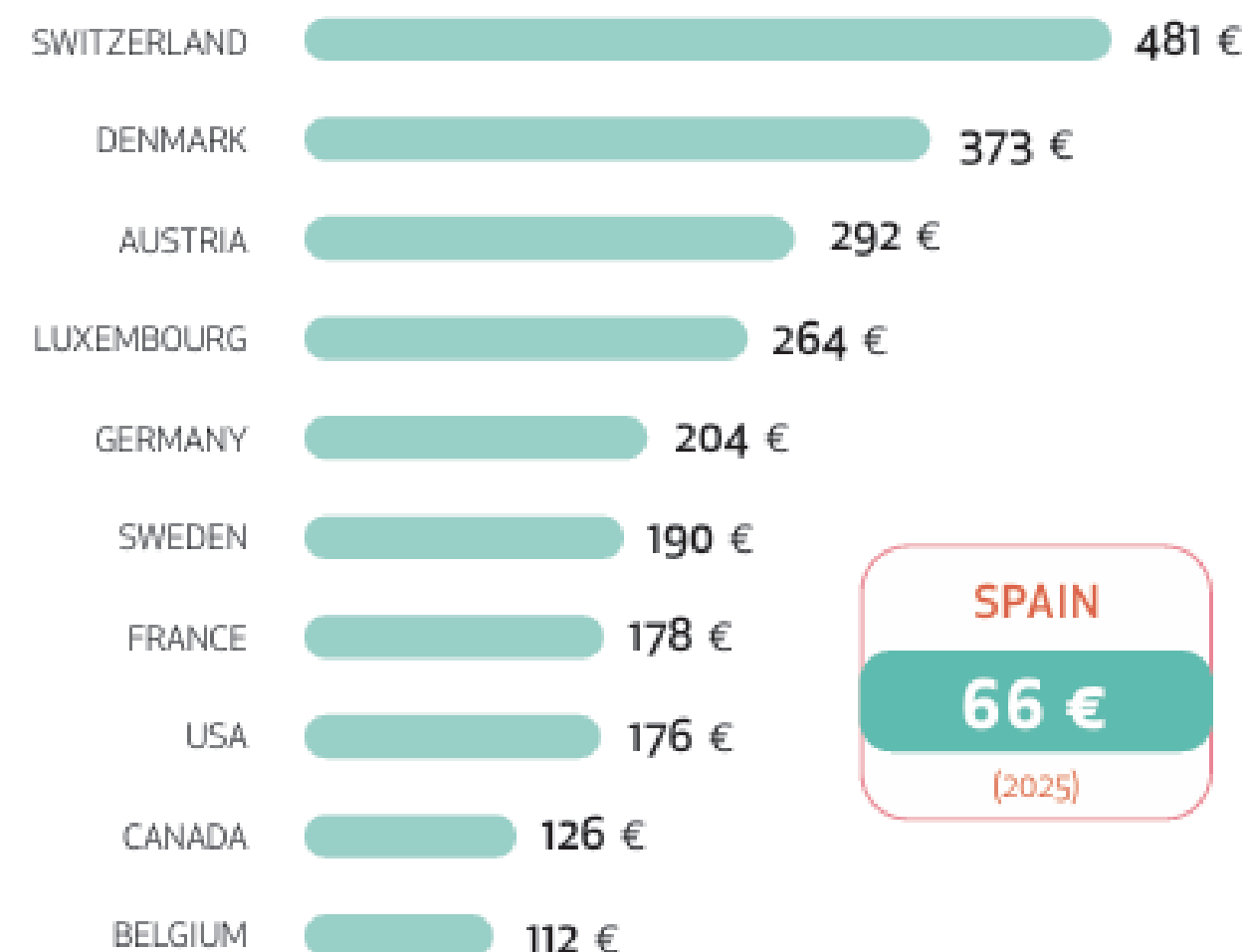


Input: Organic Market Insights SPAIN

COUNTRIES WITH HIGHEST ORGANIC EXPENDITURE IN THE WORLD



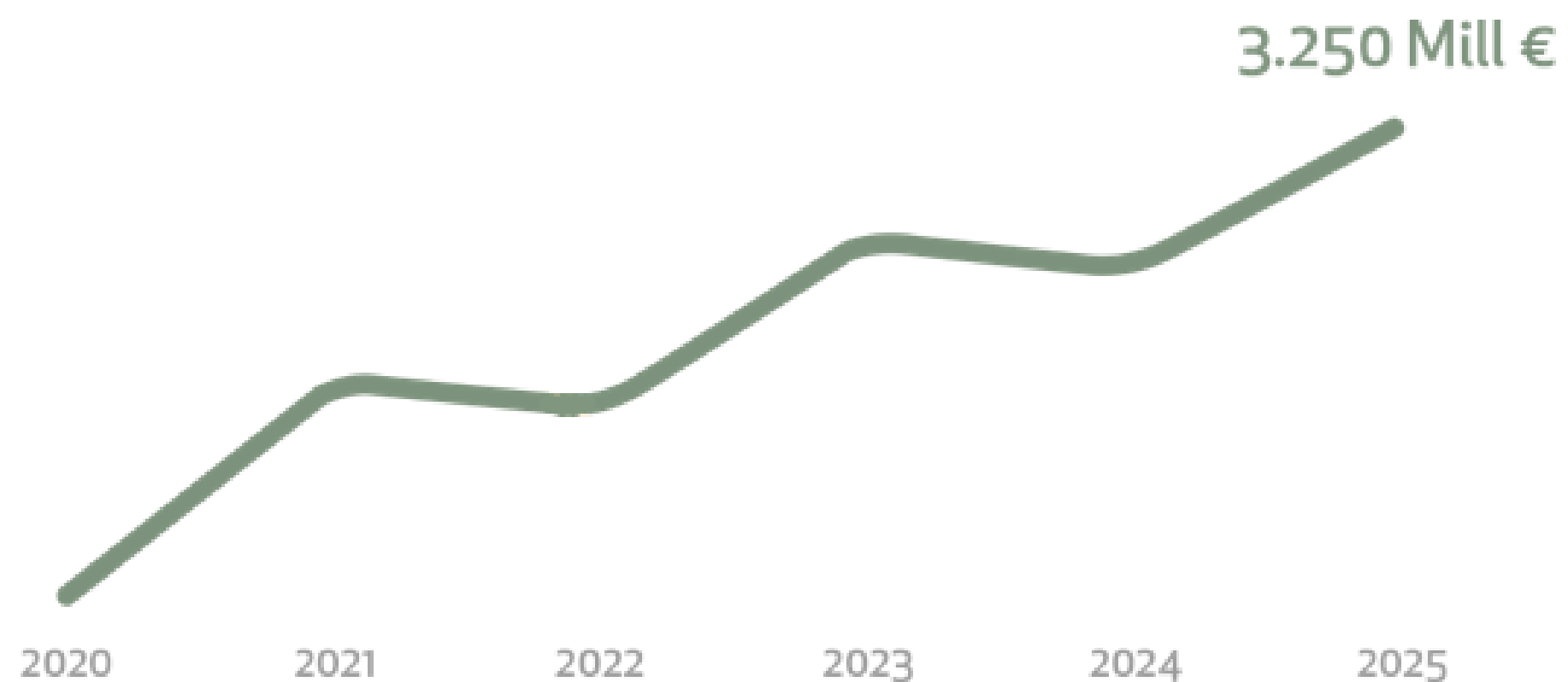
TOP TEN COUNTRIES WITH HIGHEST EXPENDITURE PER CAPITA + SPAIN



Source: Ecovalia, based on "The World of Organic Agriculture 2026" (FiBL and IFOAM Organics International)

Input: Organic Market Insights SPAIN

TOTAL ORGANIC FOOD EXPENDITURE DEVELOPMENT IN SPAIN

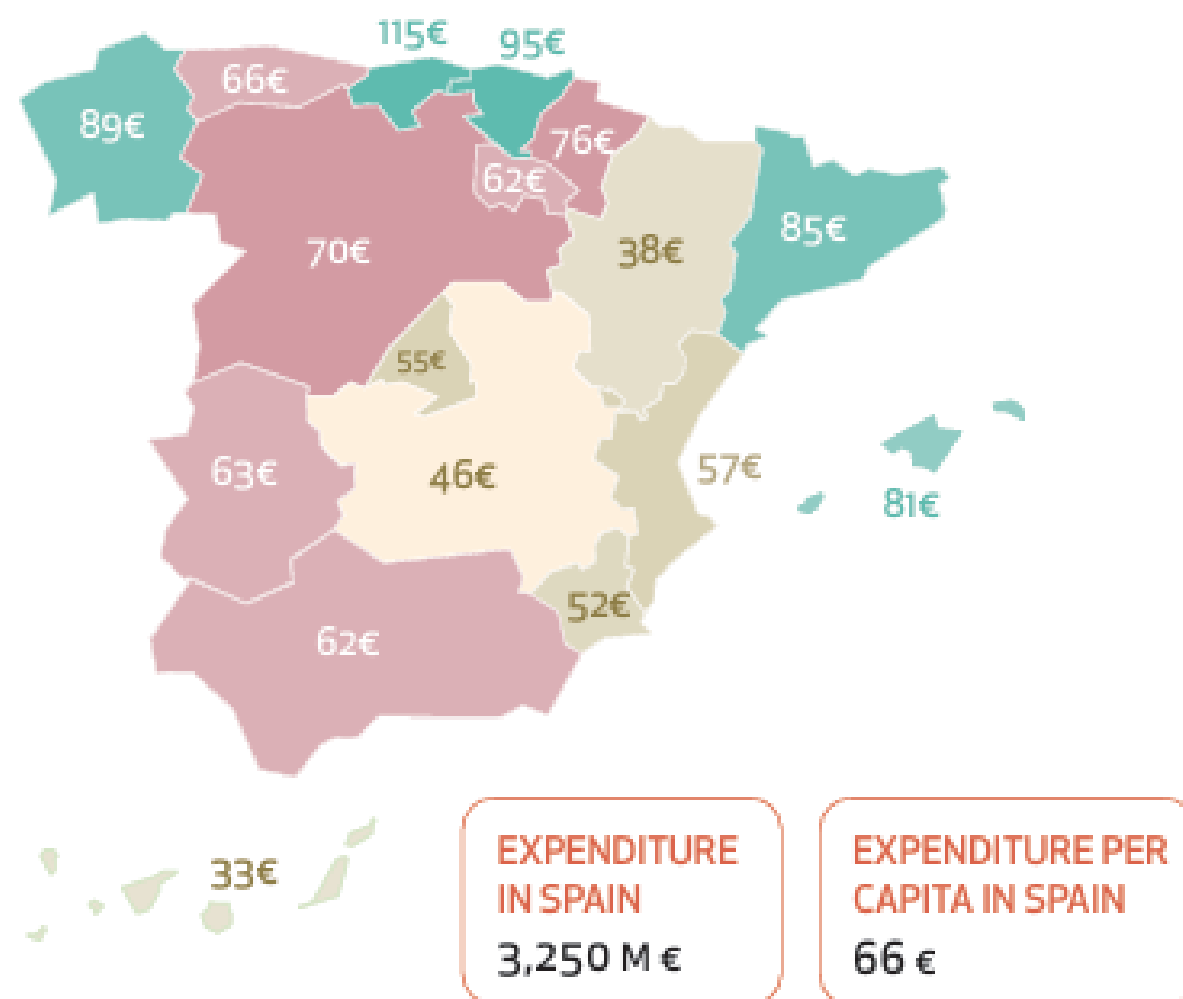


According to the yearly development, Spain will reach 79 € per cápita in 2030

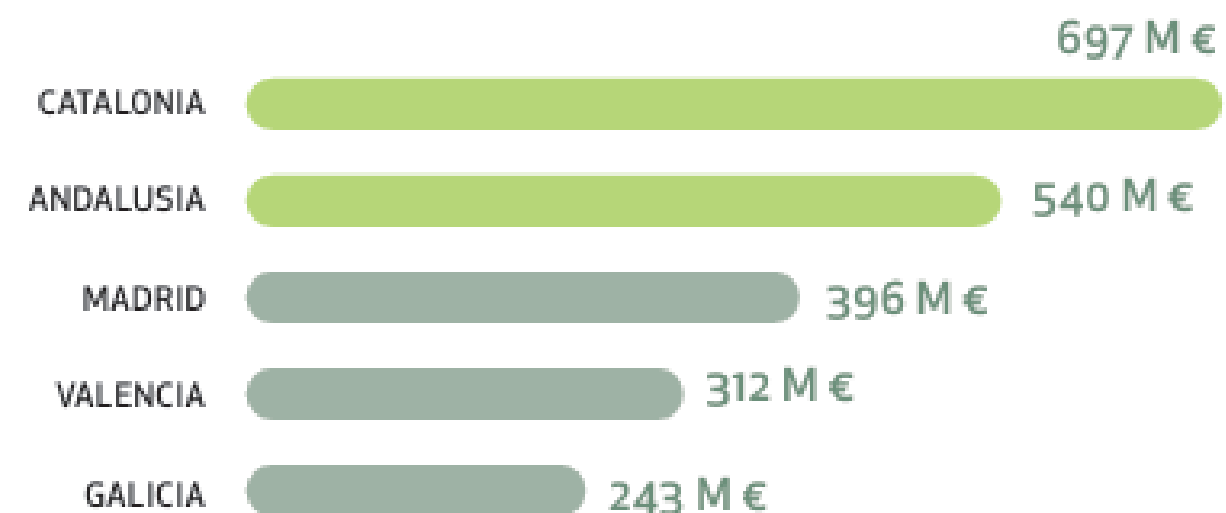
Source: Ecovalia from Official data coming from the Spanish Ministry of Agriculture, Fishing and Food (MAPA).

Input: Organic Market Insights SPAIN

Organic Consumption in Spain (2025)



EXPENDITURE IN THE SPANISH REGIONS WITH HIGHEST EXPENDITURE

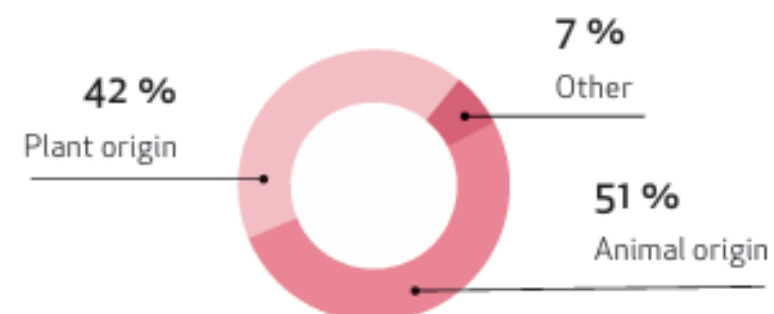


Source: Ecovalia, based on data from Ministry of Agriculture, Fisheries and Food (MAPA), 2025

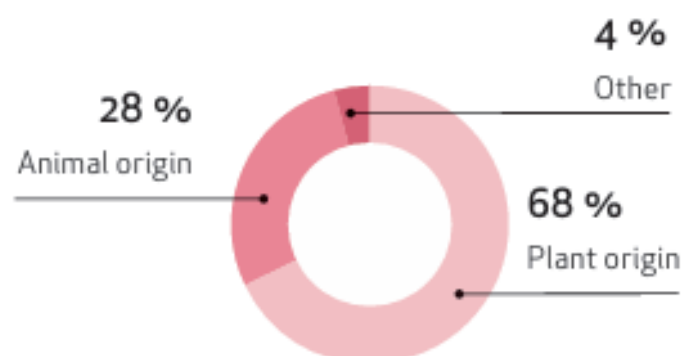
Input: Organic Market Insights SPAIN

Organic shopping cart (2025)

SHARE IN THE ORGANIC SHOPPING CART (expenditure in €)



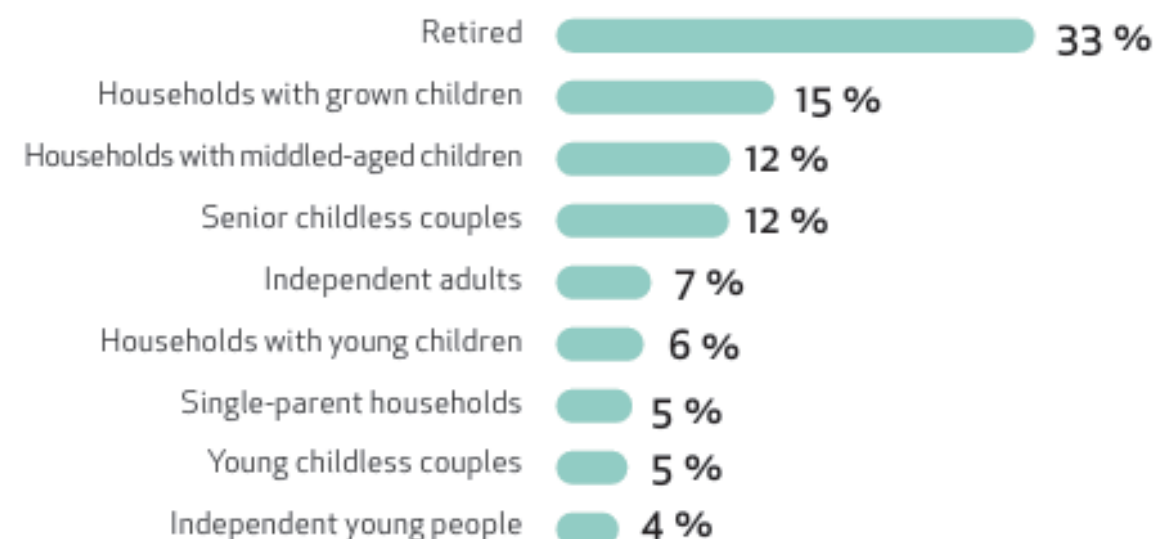
SHARE IN THE ORGANIC SHOPPING CART (kg/l)



EXPENDITURE IN SPAIN (home + HoReCa) **3.25 %**

2024 GROWTH **7.5 %** ↑

CONSUMPTION ACCORDING TO HOUSEHOLD COMPOSITION



CONSUMPTION BY AGE RANGE



Source: Ecovalia, based on data from Ministry of Agriculture, Fisheries and Food (MAPA), 2025

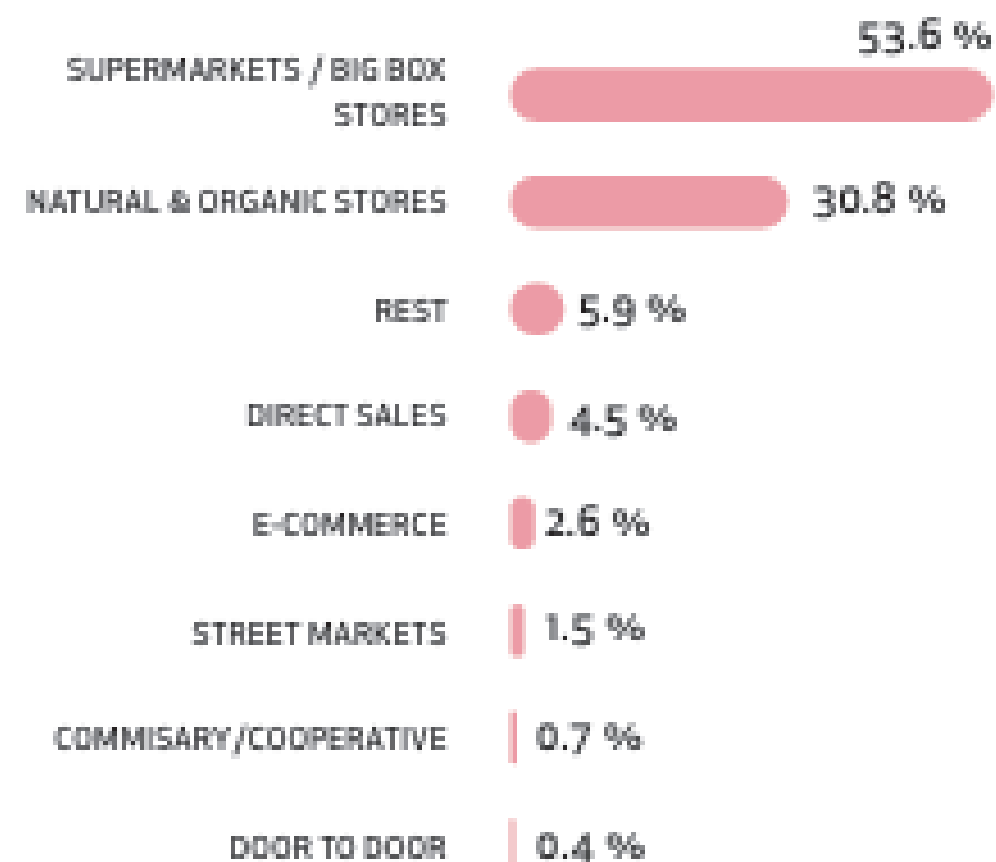
Input: Organic Market Insights SPAIN

The organic consumer priority is not “buying cheaper”, but “buying better”.

Organic meat prices confirm there is a convergence of prices, only 0,36€/kg compared to conventional ones

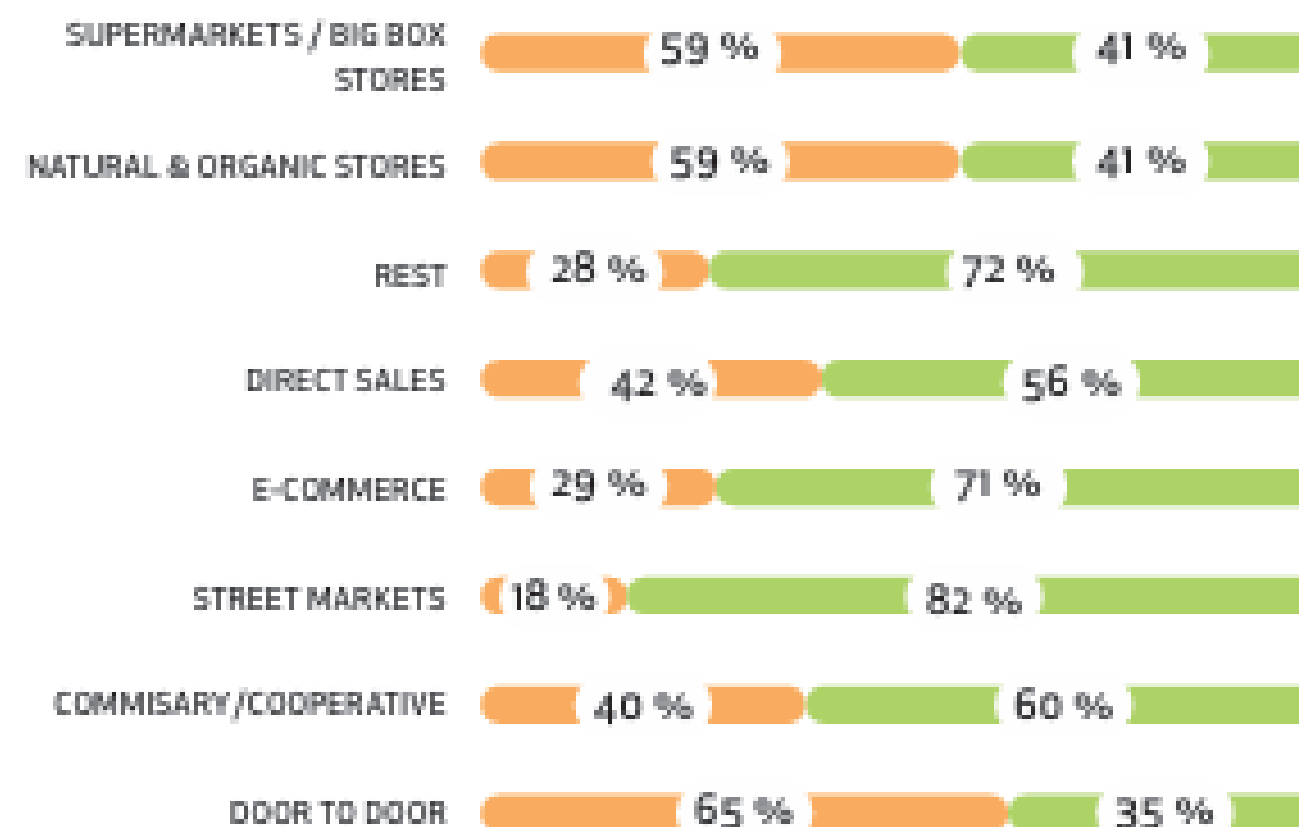
Retail channels (2025)

EXPENDITURE BY DISTRIBUTION CHANNEL



SHARE IN THE ORGANIC SHOPPING CART BY DISTRIBUTION CHANNEL (€)

● Animal origin
● Plant origin

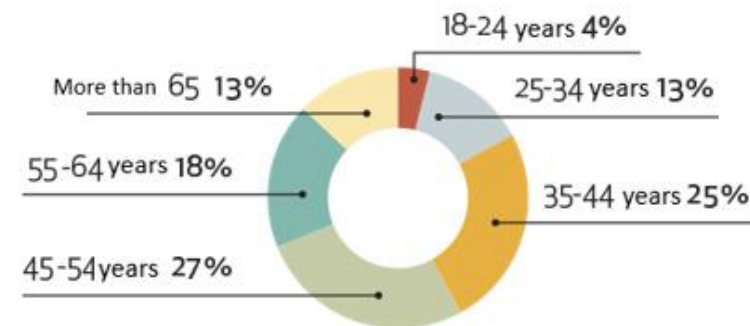


Source: Ecovalia, based on data from Ministry of Agriculture, Fisheries and Food (MAPA), 2025

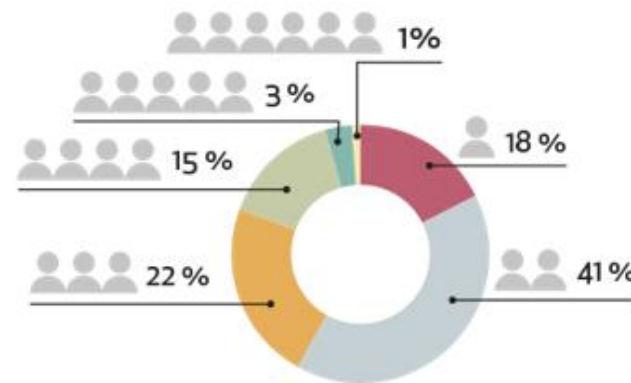
Input: Organic Market Insights SPAIN

Specialized retailers, Veritas case

AGE



NÚMERO DE PEOPLE



Source: Veritas. 2025 data

GENDER



High loyalty of their clients with frequency of 3,3 times in the month buying.



Input: Organic Market Insights SPAIN

ECO restaurants is a visible and growing sector

According to our information organic products will increase in the the following years, main reasons:

- Social Demand
- Succesfull examples of public procurement in cateens
- Recent emerging standards
- Initiatives to foster the certification of restaurants and caterings



Input: Organic Market Insights SPAIN

Organic consumer in Spain

Why the consumer choose organic food

1. Health
2. Environmental Impact and sustainability
3. Animal Welfare
4. Trust (Eurohoja)



Source : Own Elaboration based on various sources (MAP, Eurobarometer , own studies,...)



Thank you

Questions ?



Photo Credits: Stephan Jaun, Bio Suisse

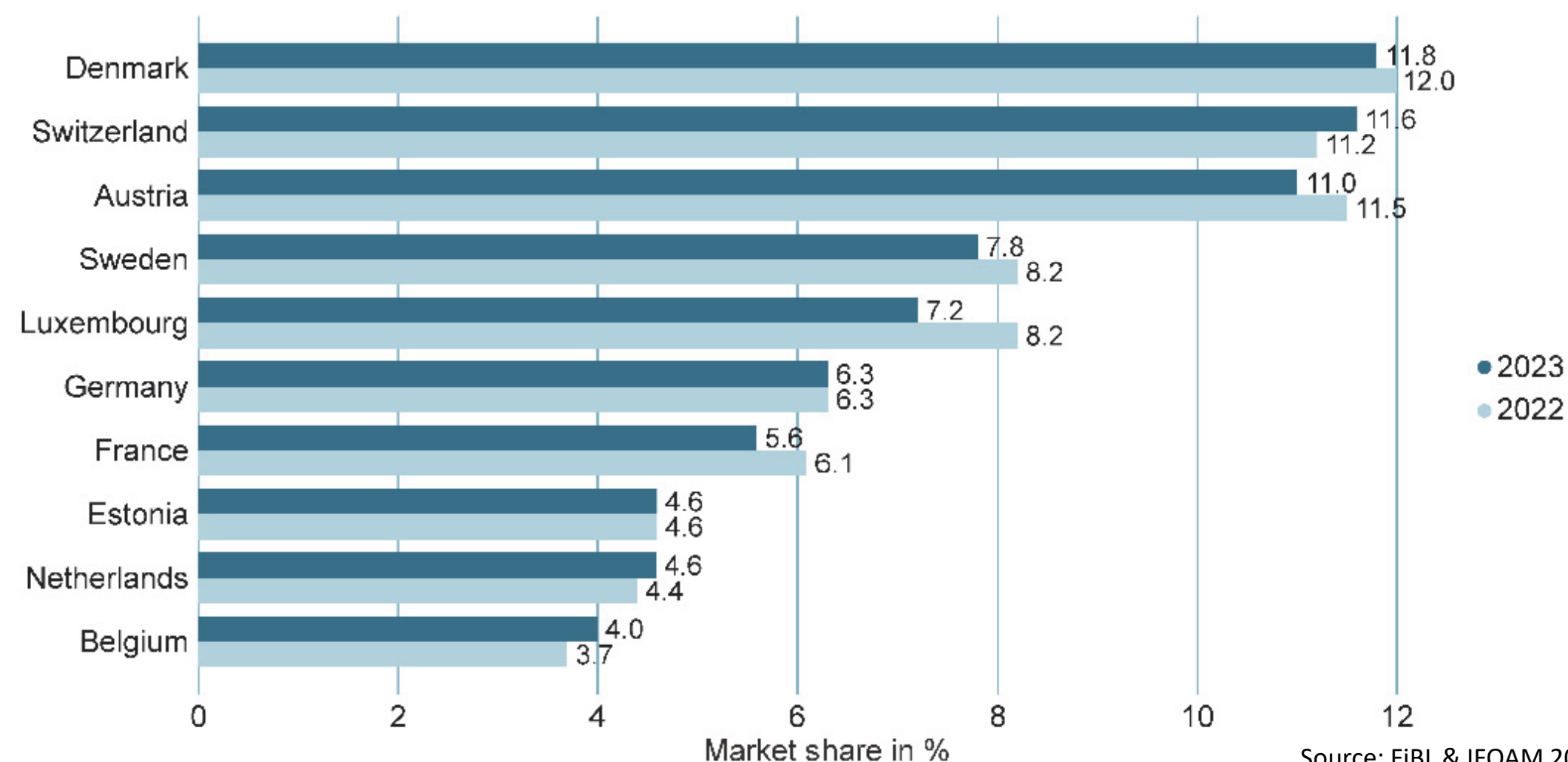
Organic Market Shares in Europe

Europe: The countries with the highest shares of the total retail sales 2021 and 2023

Source: FiBL-AMI survey 2025

Organic in the EU

- Organic area in all area: 10.8 % (2024)



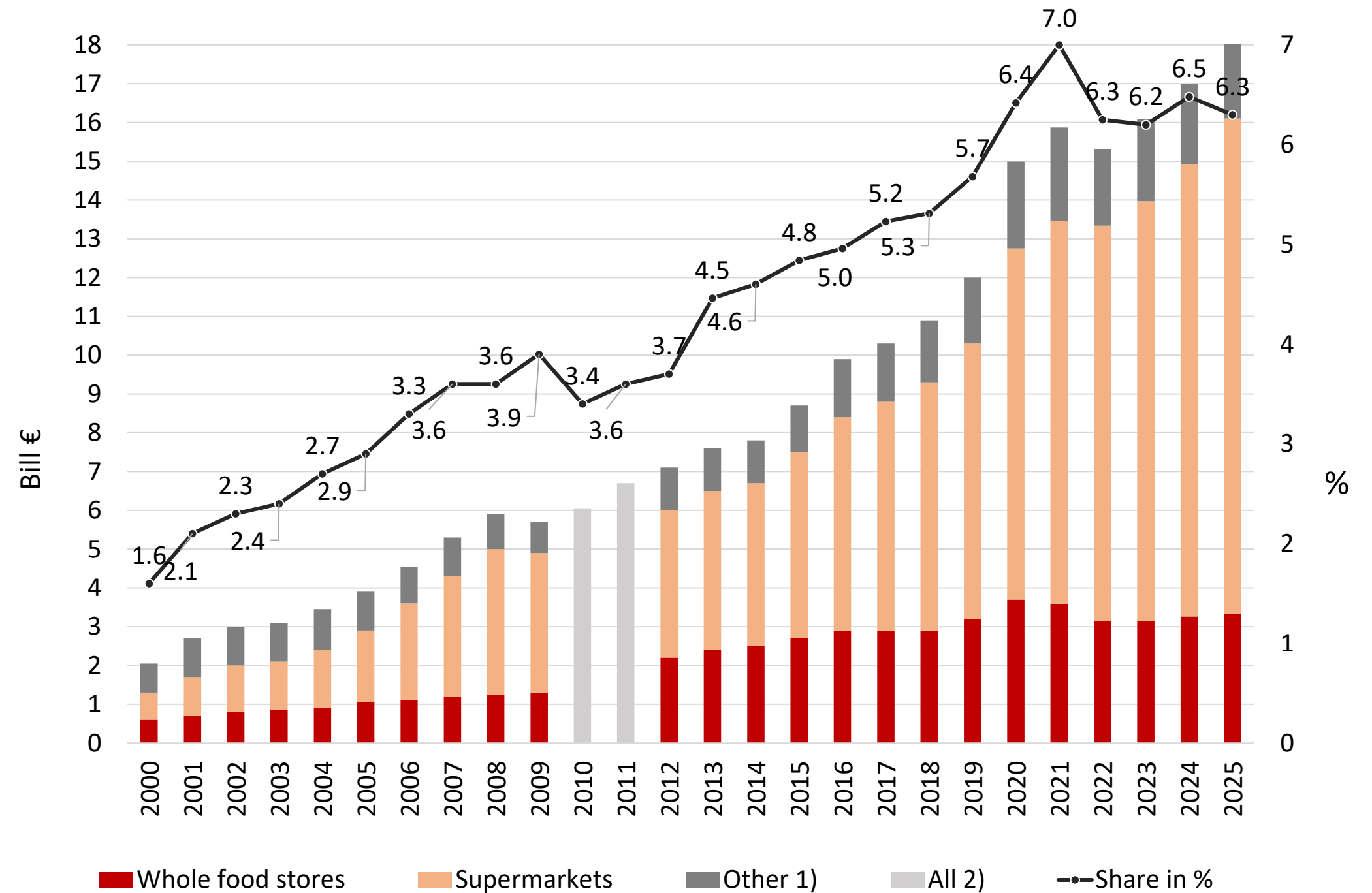
Background

Increase in food prices since Jan 2020
→ 36%

- Organic - some time lag and less
- Change of price relation conventional and organic food

Relevance

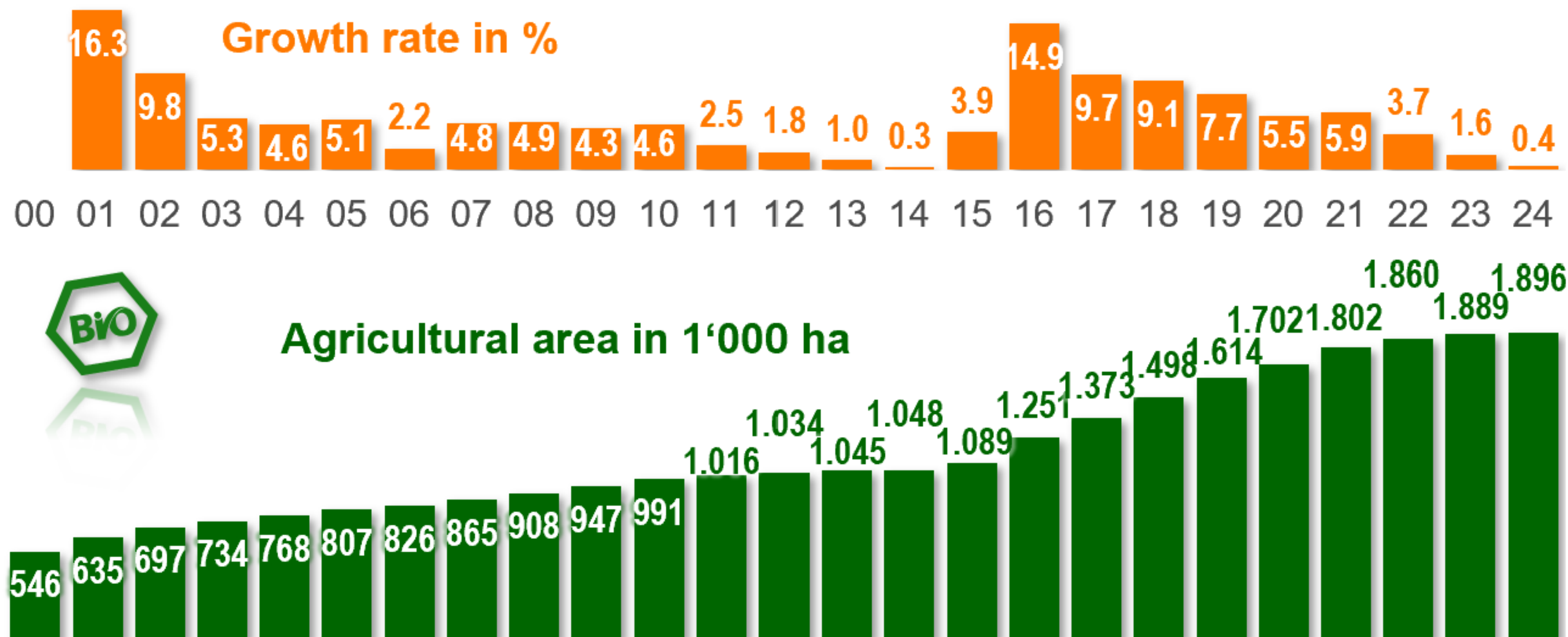
- Organic area in all area: 11.5 % (2025)
- Organic food sales in all food sales (2025): 6.3 %



1) incl. Bakeries, Butchers, Farmers, etc. .
2) no detailed data available

Organic Area in 2024 without impulses

Development of organic area in Germany, growth rate compared to the previous year in % and area in 1,000 ha

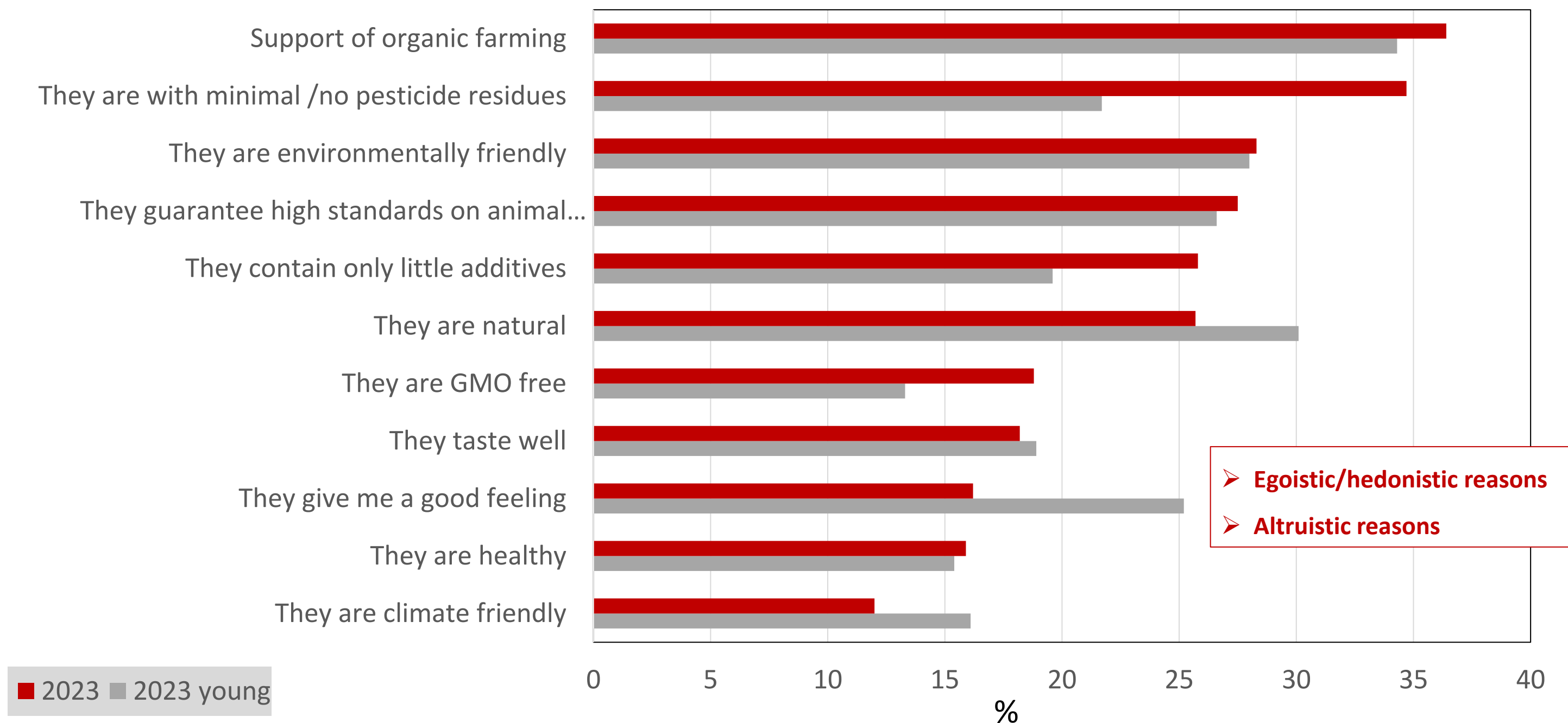


Demand and supply - overview

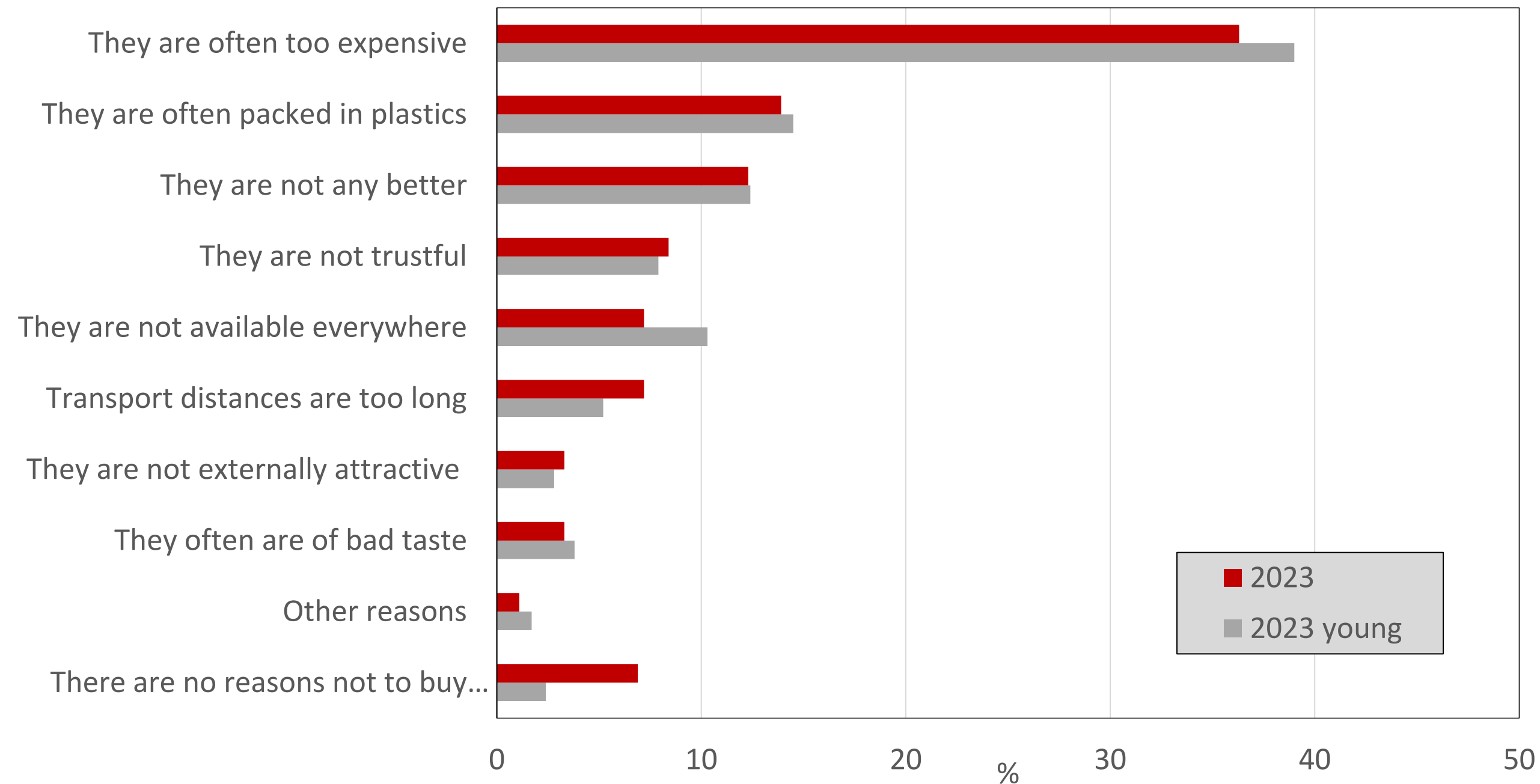
Socio-economic framework with effects on organic markets

- Stable and slightly increasing demand, increasing turn overs but inflation
→ Share of turn over with organic in all food rather stable
- Shift from small organic shops to supermarkets and discount and drug stores
- Some quantity effect due to increasing sales in discount and drug stores at lower prices
- Increasing scales of farm production, processing and trade → conventionalisation!
- Stable production, very low conversion rates
→ producer prices too low to cover organic production costs, not only milk
- Increasing imports → only meat and dairy

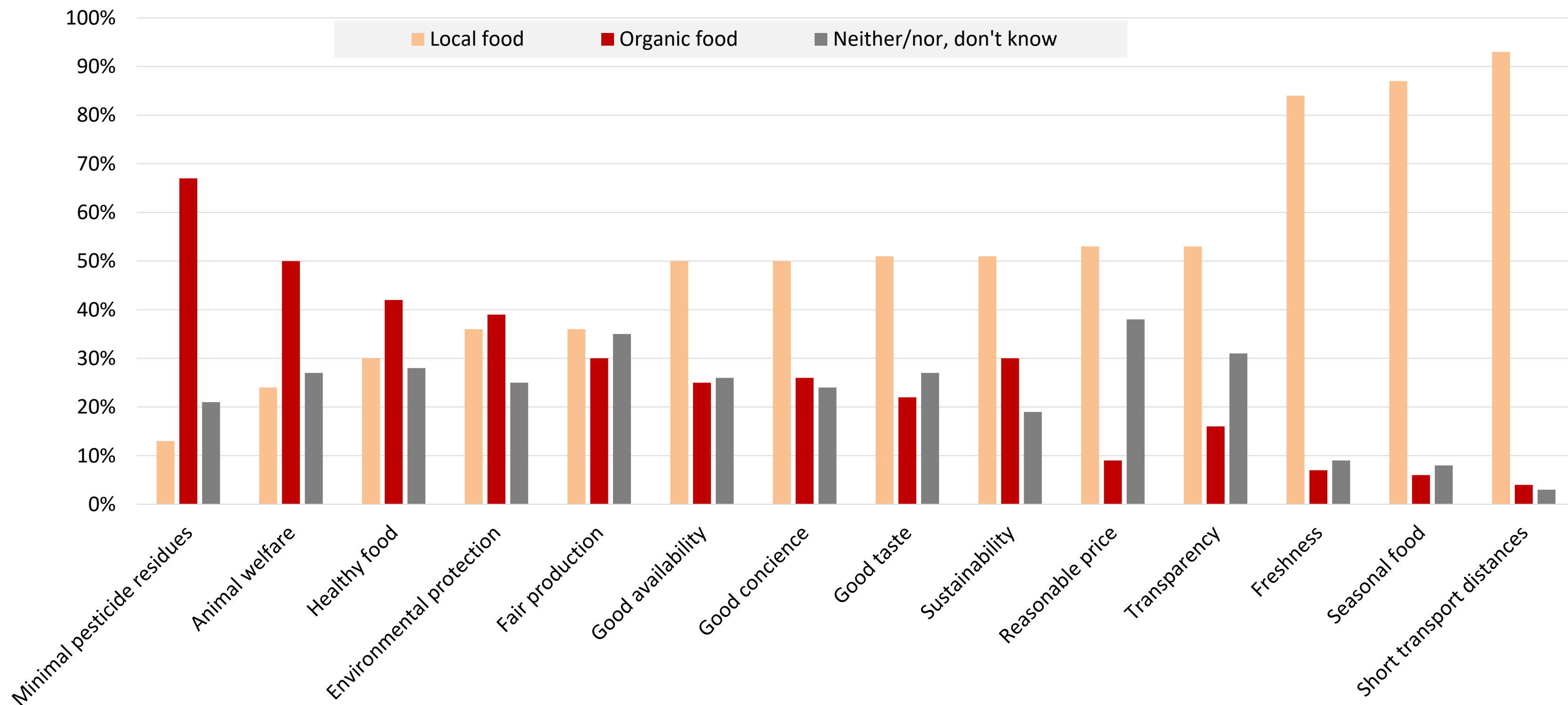
Motives for buying organic food



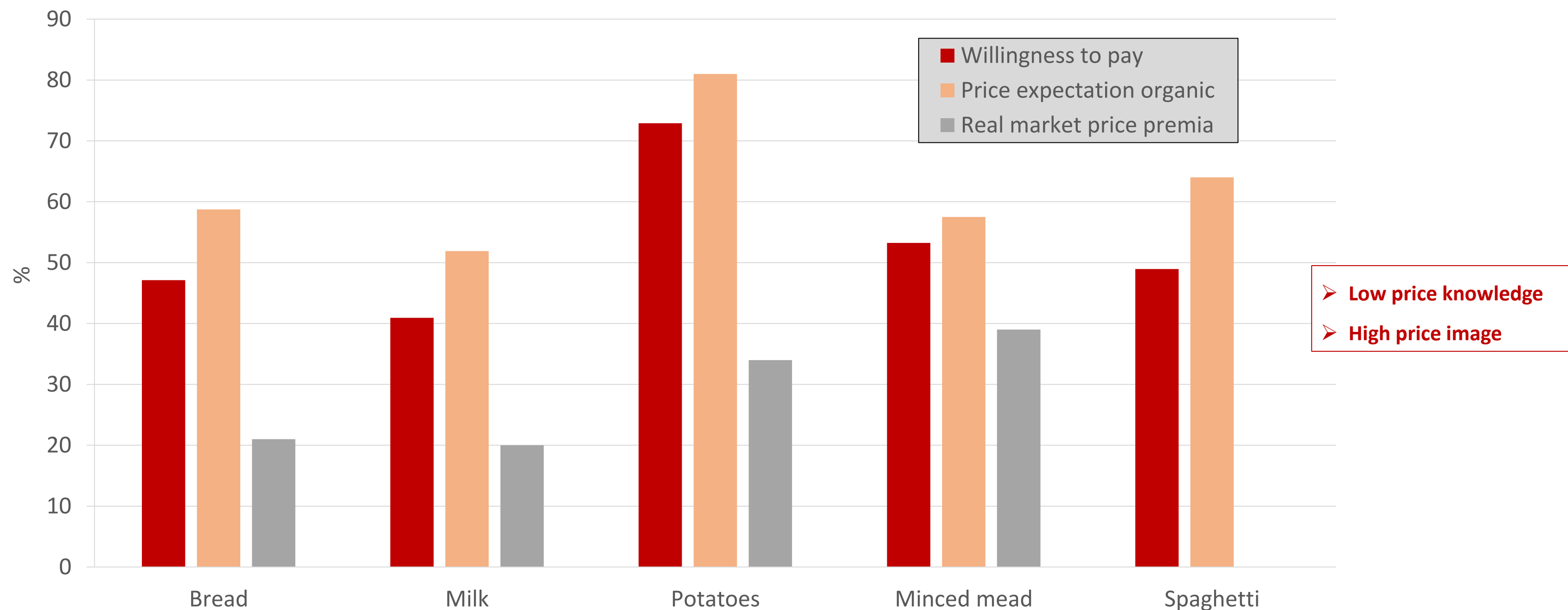
Barriers for organic food consumption



Organic or local ?



Organic food with high price image



Consumers and organic

- Low knowledge of the impact of food production and consumption on the environment and climate
- Lack of knowledge of benefits of organic food production to environment and health
- Limited availability of organic food in various European countries
- High prices in some countries, often associated with smaller organic market sizes
- High price image in other countries with larger market sizes

Summary – Perspectives Germany

- Stable organic markets
- Discount stores (and drug stores) are drivers of organic food demand
- Farm gate prices under pressure → Low conversion rates
- Bankruptcy of traditional organic processors
- Huge challenges in the German organic food market (supply chains)

Consumers

- Economic constraints
→ Consumers are becoming more price sensitive
- But consumers are highly divers!
- Low price knowledge
- Heuristics determine purchase decisions → organic is (too) expensive
- Some knowledge on organic → not sufficient!
-
- Need of better communicating benefits of organic farming (hedonistic and altruistic)
 - Go on explaining what is organic!!!
 - Organic is the more stable and resilient SYSTEM!
 - Resilience of organic systems in times of crisis (energy, less dependency on international markets)

Innovative, locally-driven, multi-actor Organic Food Labs

Organic food markets in Germany

Many thanks

Vielen Dank

Merci beaucoup

Muchas gracias

Prof. Dr. Katrin Zander
Agricultural and Food Marketing
University of Kassel
k.zander@uni-kassel.de

Questions ?



Photo Credits: Stephan Jaun, Bio Suisse

How has the organic market evolved in your country?



Have you observed any recent shifts in consumer demand?

Wrap-up of CoP Marketplace

Eduardo Ruiz Velasquez

Photo Credits: Andreas Basler, FiBL





Become a CoP member (free of charge)

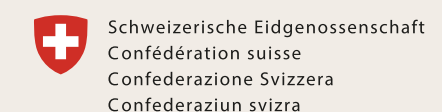
Together we shape the future of local organic food systems in Europe:

- National & international meetings
- Peer-to-peer exchange
- Training activities
- Co-learning & co-creation

JOIN NOW!



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Next Webinars 2026 – save the date!



**26th May
2026**

Role of processing in local organic food systems

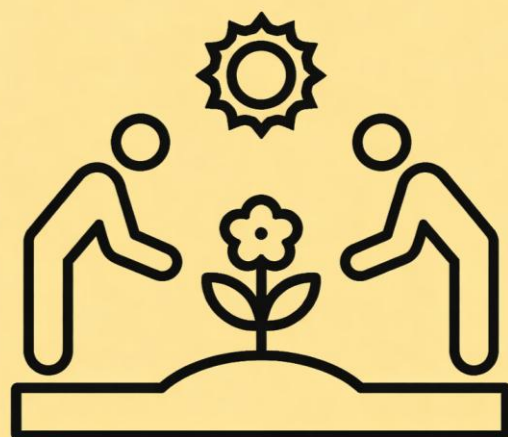
Speakers:

Rodolphe Vidal (Itab, FR)

Bernard Lignon (Synabio, FR)

Moderation:

Alexander Beck (AöL, DE)



**17th Sept.
2026**

Connecting farmers, communities, and markets in organic agriculture.

Speakers:

Michaël Wilde (Organic Embassy, NL)

Michèle Hürner (Biomondo, CH)

Camilla Mikkelsen (Økologisk Samsø, DK)

Moderation:

Nina Lamprecht (FiBL, CH)



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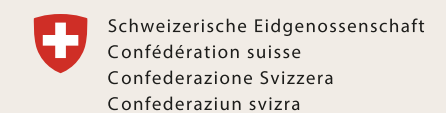
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FiBL

Thank you for your Feedback!



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- YouTube: @InnOFoodLabs

