



The Organic Sector in Spain

BioCultura Barcelona , 04 may 20223

- 1.- Key Data: Organics in Spain**
- 2.- Organic Surface**
- 3.- Organic Trade**
- 4.- Organics Spain Vs EU**
- 5.- Sales Channels**
- 6.- Organic Consumer**
- 7.- Opportunities**
- 8.- Vida Sana Association**



1.- Key Data: Organics in Spain



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Organic Market Spain (Mill €)

	2017	2018	2019	2020	2021*
Organic market (Mill €)	1.962	2.180	2.363	2.528	2.752

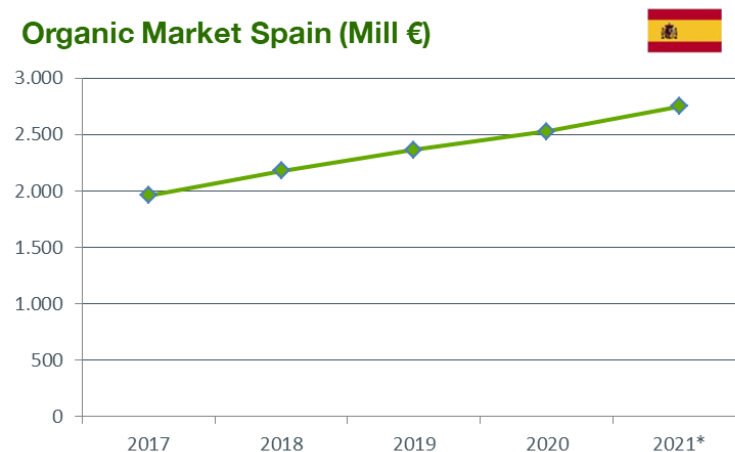
Source: Ministry of Agriculture Data and *Ecovalia forecast

Organic Market Spain (%)

	18/17	19/18	20/19	21/20	21/17
Year to year Growth (%)	11%	8%	7%	9%	40%

Source: Ministry of Agriculture Data

Organic Market Spain (Mill €)





1.- Key Data: Organics in Spain

Per Cápita Consumption (€)

	2017	2018	2019	2020	2021
Per Cápita Consumption (€/person/year)	42	47	50	53	55

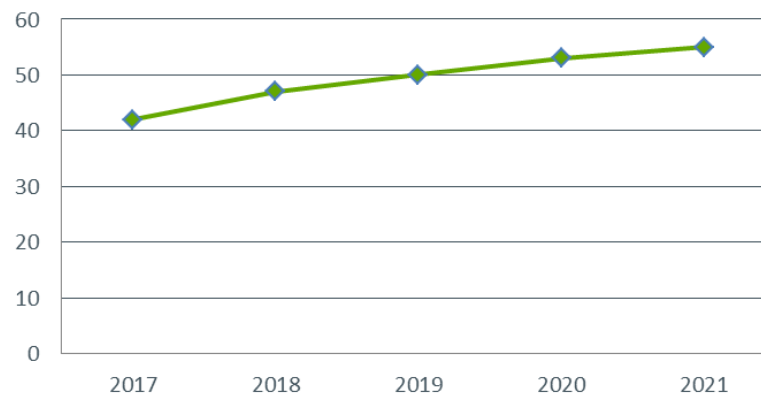
Source: Ministry of Agriculture Data and *Ecovalia forecast

Evolució Consum per Cápita Espanya (%)

	18/17	18/14	18/17	18/14	18/14
Creixement interanual (%)	12%	6%	6%	47%	31%

Source: Ministry of Agriculture Data and *Ecovalia forecast

Per Cápita Consumption (€/p/y)





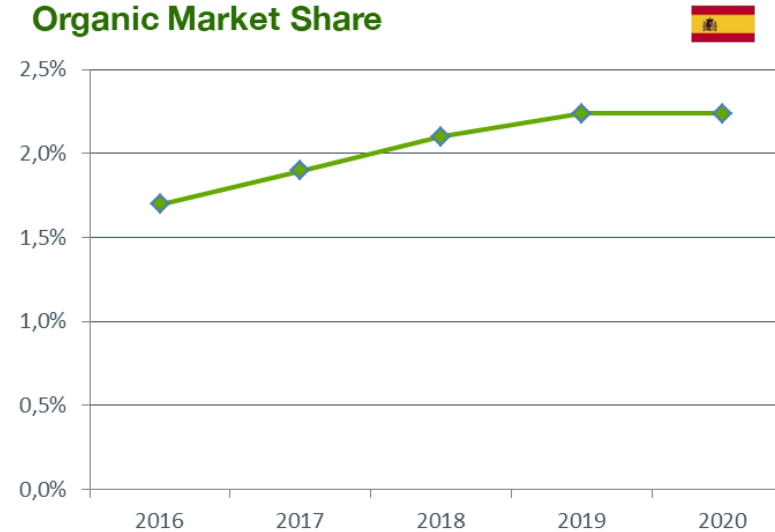
1.- Key Data: Organics in Spain

Organic Market Share (%)

	2016	2017	2018	2019	2020
Organic Market Share/ Food Beverages Market (%)	1,7%	1,9%	2,1%	2,2%	2,2%

Source: Ministry of Agriculture Data

Organic Market Share





1.- Key Data: Organics in Spain

Production

52,861
Organic
farmers

Growth
+16%

Processors

5,921
organic
processors

Growth
+ 6%

Sales

2.668
organic sales
activities

Growth
+6%.

Import/ Export

Exports 2020:
1.165Mill€.
+17%

Imports 2020:
1.014Mill€. -
5,2%



2.- Organic Surface



2.- Organic Surface

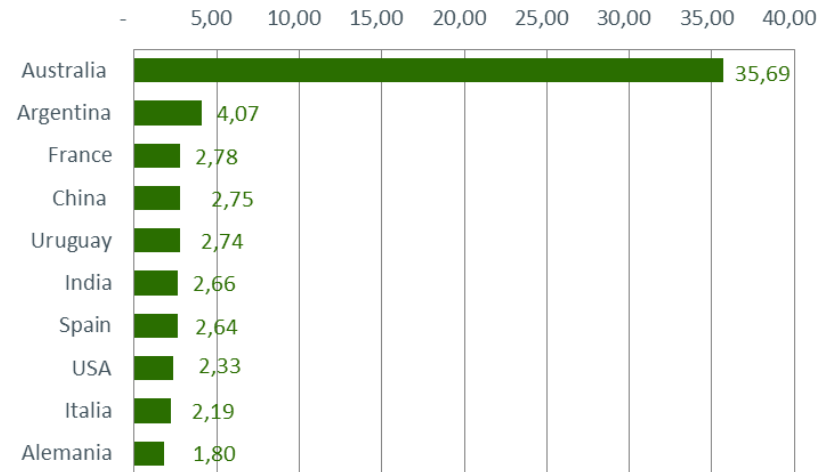
Top countries Organic Areas 2021
(Mill Hres)

	Mill. Hres.
Australia	35,69
Argentina	4,07
France	2,78
China	2,75
Uruguay	2,74
India	2,66
Spain	2,64
USA	2,33
Italia	2,19
Alemania	1,80

Source: FiBL

Top countries Organic Areas 2021

Source: FiBL





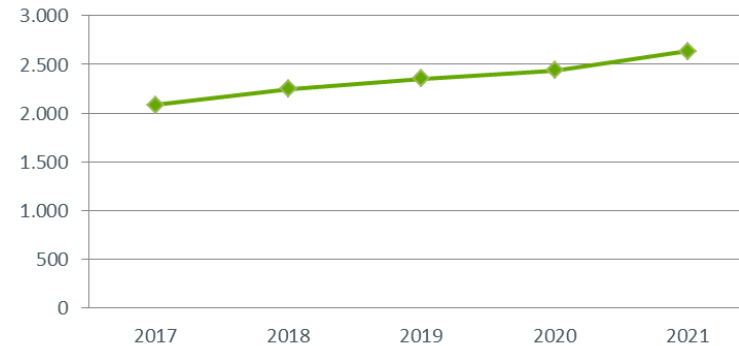
2.- Organic Surface

Evolution of Organic Farming Surface in Spain. (2017-2022)

	2017	2018	2019	2020	2021
Surface (Thousand hres)	2.082,17	2.246,47	2.354,92	2.437,89	2.635,44

Source: Ministry Agriculture

Evolution of Organic Farming Surface in Spain. (2017-2022)



KEY IDEA: Spain shows 10'8% of Agriculture Surface devoted to Organic 2021



2.- Organic Surface

Evolution of Organic Farming Surface in Spain by Regions. (2017-2021)

(Hras)	2017	2018	2019	2020	2021
Andalucía	974.393	1.024.430	1.065.260	1.098.493	1.369.440
Aragón	56.885	60.328	67.186	70.391	103.852
Asturias	12.754	13.265	14.109	13.066	14.277
Baleares	32.348	35.846	36.587	37.823	39.755
Canarias	6.608	7.072	7.629	7.469	8.101
Cantabria	3.169	3.489	3.479	3.981	3.702
Castilla-la Mancha	372.394	413.237	413.254	422.864	412.516
Castilla y León	42.659	50.587	59.783	69.916	88.333
Cataluña	200.750	210.818	229.608	256.983	270.686
Extremadura	94.518	94.518	104.221	105.239	108.983
Galicia	31.916	33.736	34.738	32.056	32.209
Madrid	10.065	10.656	11.661	12.066	11.919
Murcia	80.777	82.594	85.372	89.076	107.252
Navarra	57.311	83.348	84.459	60.471	62.043
La Rioja	4.903	3.575	4.001	4.449	4.676
País Vasco	4.244	4.466	5.661	6.790	7.905
C. Valenciana	96.478	114.509	127.909	146.757	153.503
	2.082.173	2.246.475	2.354.916	2.437.891	2.437.891

Source: Ministry Agriculture





3.- Organic Trade



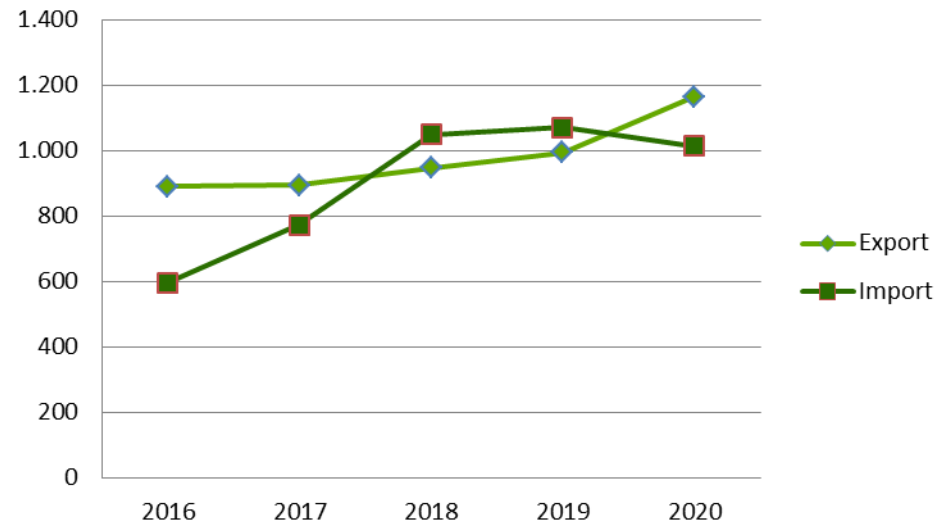
3.- Organic Trade

Exports/Imports Organics in Spain (2016-2020)

	2016	2017	2018	2019	2020	Year to Year				
						16/17	17/18	18/19	19/20	16/20
Export	891	895	947	995	1.165	0%	6%	5%	17%	31%
Import	596	773	1.050	1.070	1.014	30%	36%	2%	-5%	70%
Trade Balance	295	122	-103	- 75	151	-59%	-184%	-27%	-301%	-75%

Source: Ministry Agriculture

Exports/Imports 2016-2020 (Mill€)





3.- Organic Trade

Exports by category (2020)

	%	Mill €
FRESH VEGETABLES AND LEGUMES	25%	291
CITRUS FRUITS	19%	221
OTHER FRUITS	11%	128
OLIVE OIL	15%	175
WINE	7%	82
CEREALS AND DERIVATIVES	6%	70
CANNED VEGETABLES	6%	70
OTHER	11%	128
TOTAL	100%	1165

Source: Ministry Agriculture

Imports by category (2020)

	%	Mill €
CEREALES Y DERIVADOS	26%	264
FRESH FRUITS	25%	254
FRESH VEGETABLES AND LEGUMES	22%	223
CANNED VEGETABLES	6%	61
OTHER	21%	213
TOTAL	100%	1014

Source: Ministry Agriculture



MINISTERIO
DE AGRICULTURA, PESCA
Y ALIMENTACIÓN



3.- Organic Trade

Main imported Organic products Spain 2019-2020

	Products	2.019	2.020	%
1	Tropical fruit, fresh or dried, nuts and spices	785 162	885 930	12.8
2	Oilcakes	341 663	385 924	13.0
3	Cereals, other than wheat and rice	254 197	233 179	-8.3
4	Beet and cane sugar	165 811	213 797	28.9
5	Wheat	241 882	203 927	-15.7
6	Oilseeds, other than soyabeans	192 514	160 137	-16.8
7	Vegetables, fresh, chilled and dried	147 471	159 155	7.9
8	Unroasted coffee, tea in bulk & maté	127 232	141 383	11.1
9	Fruit, fresh or dried, excl. citrus & tropical fruit	146 111	133 723	-8.5
10	Soyabeans	105 870	132 079	24.8
11	Fruit juices	89 008	86 519	-2.8
12	Rice	216 017	70 509	-67.4
13	Cocoa beans	74 100	65 751	-11.3
14	Preparations of vegetables, fruit or nuts	54 847	56 983	3.9
15	Sugar, other than beet & cane	39 400	43 186	9.6
16	Palm & palm kernel oils	39 644	40 586	2.4
17	Olive oil	30 125	33 621	11.6
18	Citrus fruit	29 042	29 837	2.7
19	Food preparations, not specified	17 994	22 725	26.3
20	Wine, vermouth, cider and vinegar	21 062	19 937	-5.3

Source: UE/Traces



TRACES: TRAdE Control and Expert System



4.- Organics Spain Vs EU



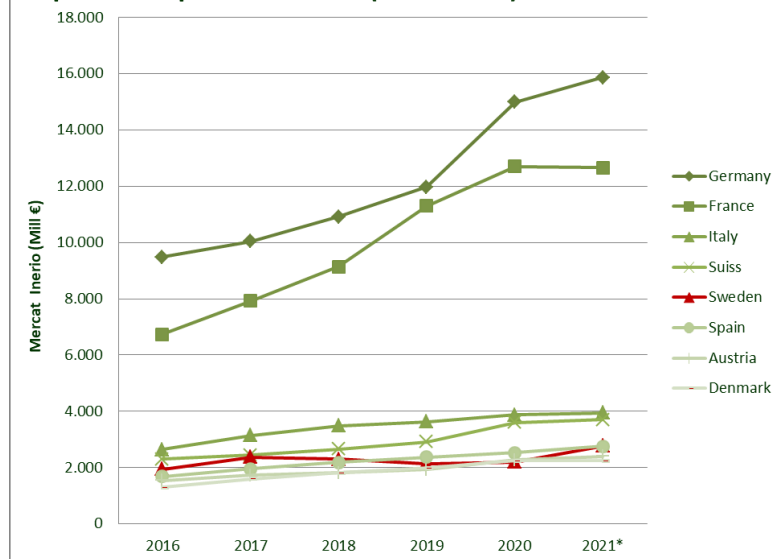
4.- Spain Vs UE

Spain Vs EU (2016-2021)

	2016	2017	2018	2019	2020	2021*
Germany	9.478	10.040	10.910	11.970	14.990	15.870
France	6.736	7.921	9.140	11.295	12.699	12.659
Italy	2.644	3.137	3.483	3.625	3.872	3.943
Suiss	2.298	2.435	2.655	2.912	3.602	3.705
Sweden	1.944	2.366	2.301	2.144	2.193	2.764
Spain	1.685	1.962	2.180	2.363	2.528	2.752
Austria	1.542	1.723	1.810	1.920	2.265	2.397
Denmark	1.298	1.601	1.807	1.979	2.240	2.240

Source : FILB +MAPA, *Ecovalia forecast

Spain Vs Top EU Countries (2016-2020)



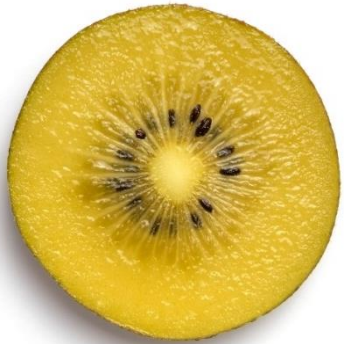
4.- Spain Vs UE

Market Share Spain Vs EU (2016-2020)

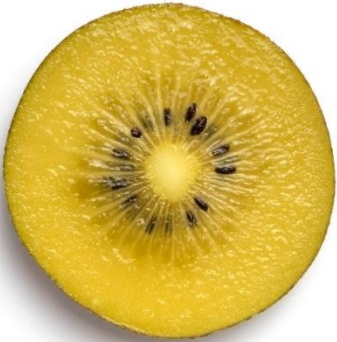
	2016	2017	2018	2019	2020	2021
Denmark	9,7%	13,3%	11,5%	12,1%	13,0%	13,0%
Austria	7,9%	8,6%	8,9%	9,3%	11,3%	11,6%
Switzerland	8,4%	9,0%	9,9%	10,4%	10,8%	10,9%
Sweden	7,9%	9,1%	9,6%	9,0%	8,7%	8,9%
Germany	5,1%	5,1%	5,3%	5,7%	6,4%	7,0%
France	3,5%	4,4%	4,8%	6,1%	6,5%	6,6%
Italy	3,0%	3,2%	3,2%	3,7%	3,5%	3,5%
Spain *	1,7%	1,9%	2,1%	2,2%	2,2%	2,2%

Source : FiBL, MAPA





5.- Sales Channels



5.- Sales Channels

Main marketing channels can be classified as:

- **Modern trade**, which includes supermarkets, hypermarkets, discount stores, among other types of POS.
- **Specialized distribution** that gathers ecostores, health food stores, organic supermarkets, and cooperative stores.
- **Direct sales** that include various initiatives such as organic markets, producers' stores, etc.
- **Other formats** that include Food Service (Hotels, restaurants, and catering) and new formats such as crowdfarming, online sales, etc.

5.- Sales Channels

Modern Trade



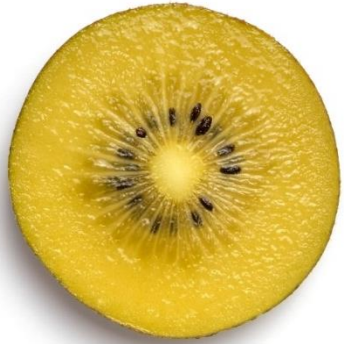
Specilized Retailing



Direct Sales



Others



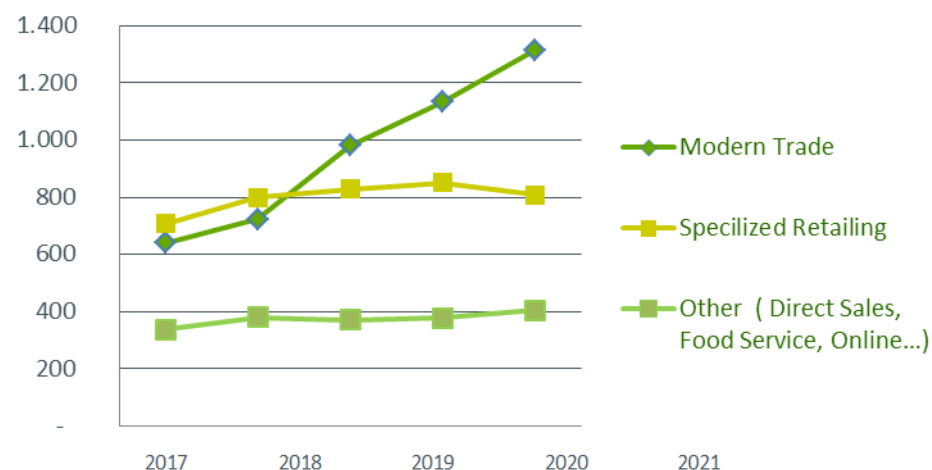
5.- Sales Channels

Sales Market Share (2016-2020)

Sales channels	Market (Mill €)					Share (%)				
	2.016	2.017	2.018	2.019	2.020	2.016	2.017	2.018	2.019	2.020
Modern Trade	641	723	980	1.134	1.315	N/d	38%	45%	48%	52%
Specilized Retailing	708	799	828	851	809	N/d	42%	38%	36%	32%
Other (Direct Sales, Food Service, Online...)	337	381	370	378	404	N/d	20%	17%	16%	16%
TOTAL	1.686	1.903	2.178	2.363	2.528	0%	100%	100%	100%	100%

Source : Ministry Agriculture

Sales Market Share





6.- Organic Consumer



6.- Organic Consumer

Consumption by Region 2020

REGION	% Share	Population	Per capita	Market
CATALUÑA	22%	7.763.362,0	80,2	557.039,1
ANDALUCIA	17%	8.472.407,0	49,9	430.439,3
MADRID	11%	6.751.251,0	43,8	278.519,6
VALENCIA	9%	5.058.138,0	43,0	227.879,6
GALICIA	8%	2.695.645,0	71,4	202.559,7
PAIS VASCO	6%	2.213.993,0	70,0	151.919,8
CASTILLA Y LEÓN	5%	2.383.139,0	51,9	126.599,8
ARAGÓN	3%	1.326.261,0	53,8	75.959,9
CANARIAS	3%	2.171.944,0	37,2	75.959,9
ISLAS BALEARES	3%	1.172.008,0	78,5	75.959,9
CASTILLA LA MANCHA	3%	2.049.562,0	21,6	75.959,9
REGIÓN DE MURCIA	2%	1.518.486,0	36,9	50.639,9
EXTREMADURA	2%	1.059.501,0	52,0	50.639,9
ASTURIAS	2%	1.011.792,0	57,1	50.639,9
CANTABRIA	2%	584.507,0	79,5	50.639,9
NAVARRA	1%	661.537,0	56,1	25.320,0
LA RIOJA	0%	319.769,0	39,3	-
ESPAÑA	1,0	47.213.302,0	54.70	2.531.996,0

Source: Ministry Agriculture





6.- Organic Consumer

Top Categories Spain 2020

CATEGORY	Thousand €	%
MEAT & DERIVATIVES	713.409,1	28%
OTHER PRODUCTS	569.025,1	22%
FRESH FRUITS	338.871,9	13%
FRESH VEGETABLES	260.730,9	10%
BREAD	173.227,9	7%
EGGS	96.784,0	4%
BAKING & BISCUITS	70.891,4	3%
VEGGIE DRINKS	46.888,2	2%
OLIVE OIL	38.752,9	2%
FRESH POTATOES	37.671,5	1%
COFFEE & TEA	30.715,1	1%
DRY FRUITS	30.196,4	1%
MILK & DAIRY	22.672,1	1%
CANNED FRUIT & VEG	20.800,5	1%
LEGUMES	20.700,2	1%
WINE	15.903,6	1%
TAKE AWAY/READY TO EAT	14.547,5	1%
WINE	10.248,0	0%
PASTA	9.777,3	0%
JUICES	6.652,2	0%
RICE	3.530,4	0%
TOTAL	2.531.996,0	1,0

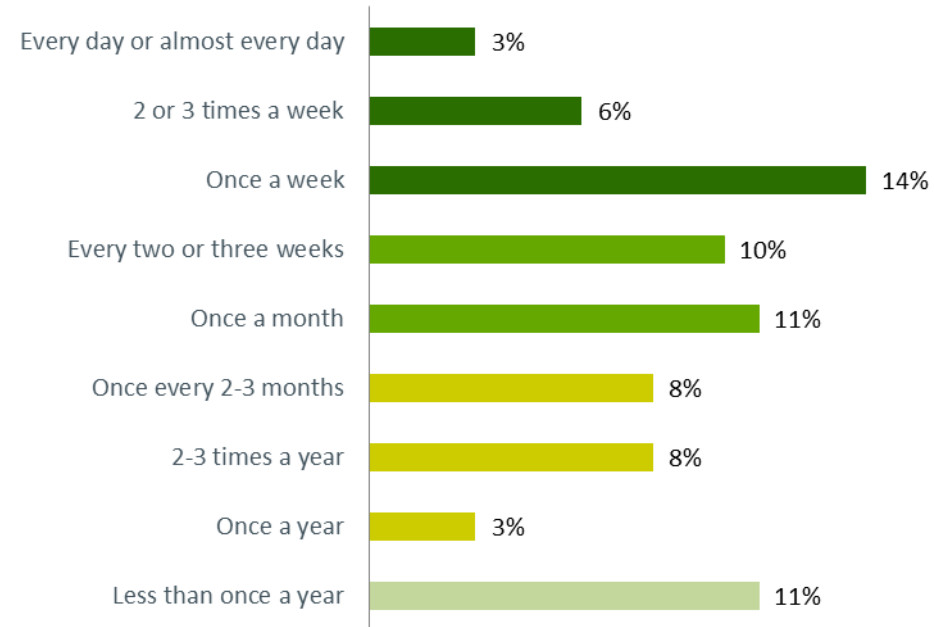
Source: Ministry Agriculture

6.- Organic Consumer



Shopping habits

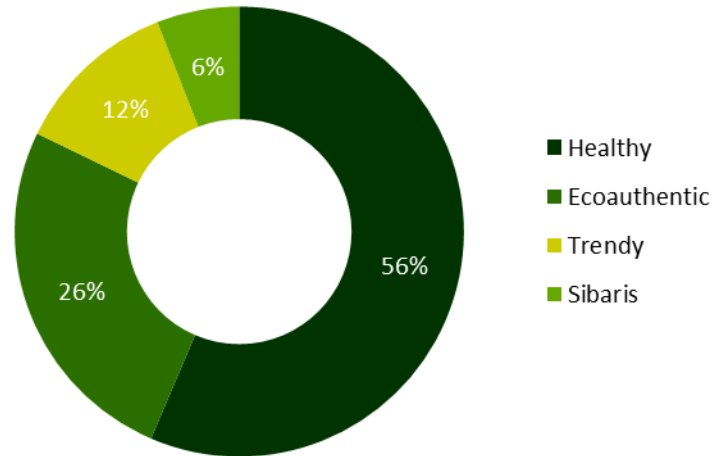
Source: AECOC Shopperview



6.- Organic Consumer

Consumers Profile

Source: AECOC Shopperview



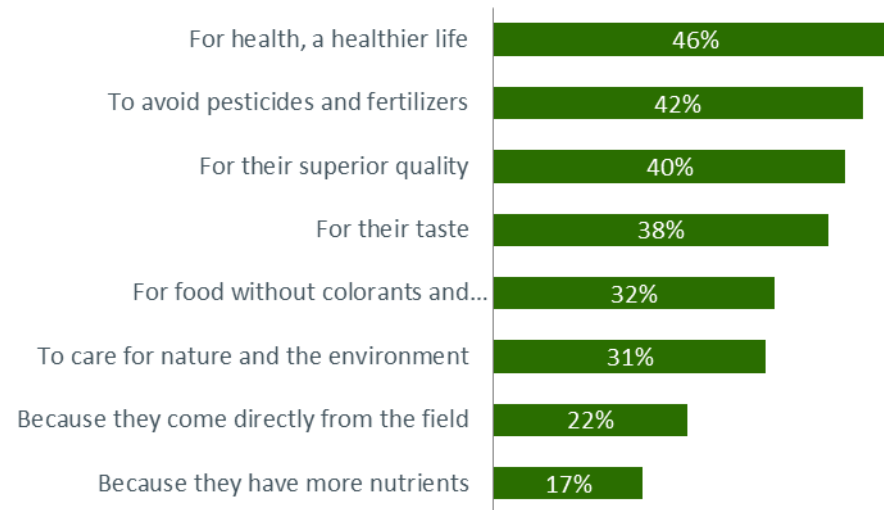
- Healthy: "They allow me to lead a healthy lifestyle and prevent diseases."
- Eco-authentic: "I know that when I buy organic products, I'm doing the right thing."
- Trendy: "I love people who take care of themselves and consume ECO/BIO products."
- Sybarite: "I always like to eat well and look for the best flavor, a flavor like the old days."



6.- Organic Consumer

Consumer behaviour -Reason for consuming

Source: MAPA-GFK 2017





7.- Opportunities

7.- Opportunities

- Strategic sector for EU



Green Deal



Farm to Fork



PLAN DE ACCIÓN

para el desarrollo de la producción ecológica. ASOBIO 15/4/21
Diego Canga Fano, Consejero Principal, DG AGRI



Organic Action Plan .

- 25% organic Surface by 2030
- Boost consumption
- Green Public Procurement
- R+D Funding + Promotion Funding
- National Organic Plan

7.- Opportunities

Trends



Ferments, probiotics



Veggie



Free from



Healthy Snack



Sport Nutrition



Red&Dry Fruits



7.- Opportunities

Sales Channels

Modern Trade

New assortment

Specilized Retailing

Organized Specialized Retailing : Up
Independent Specialized Retailing : Down

Direct Sales

Direct Sales: Up (Local, season...)

Others

New Crowdfarming, Garden Center, Cooperatives



7.- Info Sources

- Ministry of agriculture, MAPA:
 - <https://www.mapa.gob.es/es/alimentacion/temas/produccion-eco/>
- Organic Agencies.
 - Ex: Catalunya <https://ekolurra.eus/eu>
- Sector associations
 - Asociación Vida Sana www.vidasana.org
 - ASOBIO www.asobio.org
 - SEAE www.agroecologia.org
- Exhibitions & fairs
 - BioCultura www.biocultura.org



8.- Vida Sana Association



7.- Asociación Vida Sana

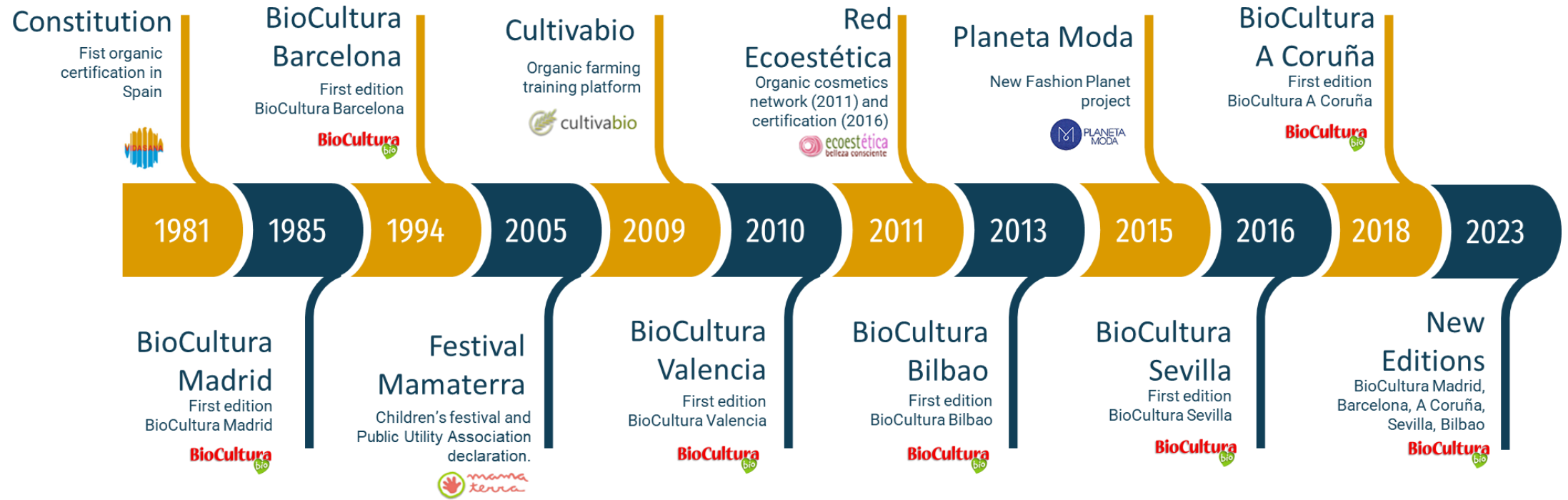
Non-profit entity declared as a Public Utility Association that from 1981 has been devoted to promote organic farming and healthy eating as the basis for a fairer and more environmentally friendly society.

Objetives:

- **Promote and defend organic farming** as the most suitable agricultural production system for environment and people's health, and supporting its development throughout the value chain.
- **Support and disseminate** sustainable consumption alternatives.
- **Communicate, train and educate in responsible consumption** and respect for the environment.



7.- Association Vida Sana





7.- Association Vida Sana

1.481 Exhibitors*

The only national event that gathers the entire sectoral value chain, production, processing, distribution and consumption.



6.150 Professional visitors*

Meeting point of professionals from the main national sales channels and distribution.

111.716 Conscious consumers*

Bringing the organic offer closer to consumers and an ideal place for brand building.



950 Activities*

Including business meetings, conferences, showcookings, showrooms and tastings.

- Annual grouped data of the four 2019 editions : Madrid, Barcelona, Valencia and Seville

Thanks ji

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