POLICY BRIEF #10

January 2026

Does organic count?

Better statistics and market data

Introduction

Organic farming is one of the fastest growing sectors in food and agriculture and has been for the last 30 years. With EU organic land area doubling and retail sales trebling every decade, more than 18 million ha (11% of EU agricultural area) were organic and the EU retail market for organic reached €50 billion in 2024.[1]

This growth, and organic farming's potential to deliver environmental and market outcomes, depends on timely, quality data critical for:

- Market transparency and efficiency, including fair pricing
- Farmer decisions to convert to, and remain in, organic farming
- Food businesses to engage and invest in processing, distribution, and trade
- Implementation and evaluation of policy support, including setting payment rates

Statistics and market data are a fundamental cornerstone of organic sector development. Without timely and quality data, decision-makers—farmers, food businesses, investors, policymakers, and consumers—are flying blind. Many will be unwilling to take the risks or will make mistakes, diminishing the environmental and market benefits that organic farming delivers.

Summary

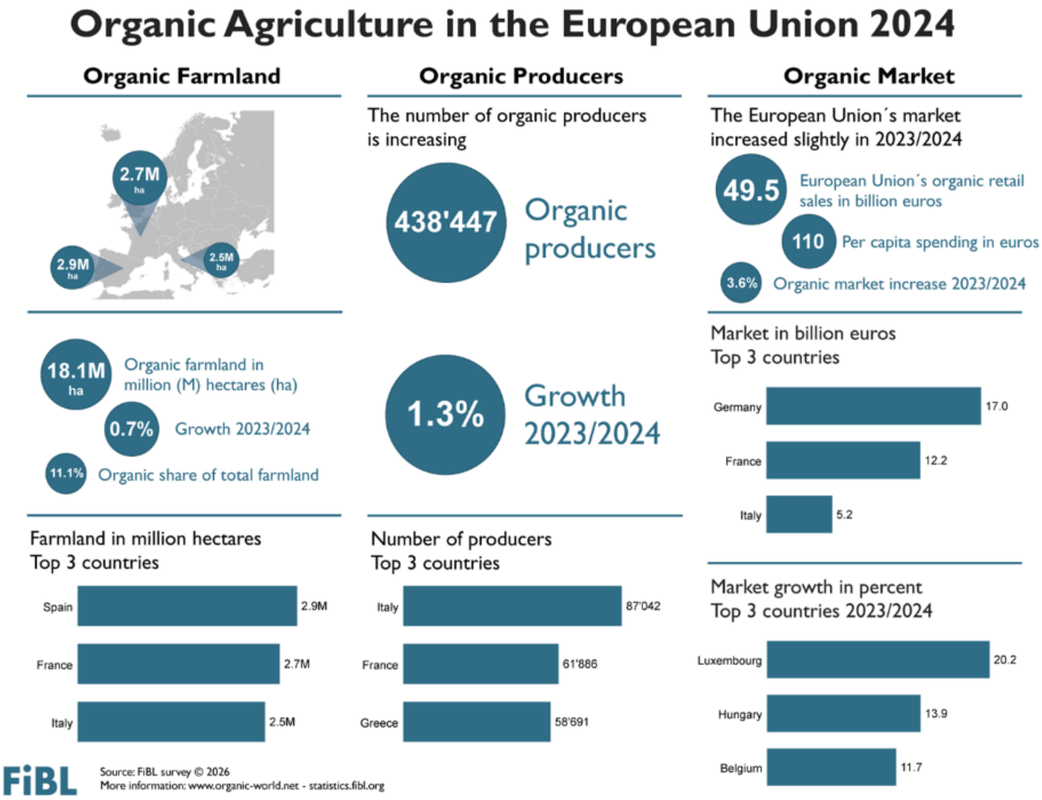
- Statistics and market data are a cornerstone of organic development. Farmer and food business decisions to engage with and invest in organic, as well as policy implementation and evaluation, all rely on timely and quality organic data.
- With the sector approaching 20-25% of EU agriculture, there should be an organic equivalent for all agricultural and food statistics.
- Significant progress has been made in recent years with respect to crop areas and livestock numbers using administrative and statistical sources. However, major gaps and challenges exist for production, farm finance, market, trade, and environmental sustainability data.
- Improvements in the SAIO Regulation implementation and the representation of organic farms in FSDN are critical.
- EU digitalisation and data governance proposals provide new opportunities. Unique IDs and EU Business Wallets could facilitate data exchange between organic operators, control bodies, and authorities, improving data collation and analysis.

[1] World of Organic Agriculture 2026 https://www.organic-world.net/yearbook/yearbook-2026.html

Key findings

The OrganicTargets4EU project examined the implications of reaching 25% of EU farmland organic by 2030. We analysed historical trends, future growth projections, and modelled the production, economic, and environmental impacts. We used data on organic crop areas, livestock numbers, input use, yields, retail sales value, and exports, often at regional level.

Figure 1 Overview of key organic food and farming statistics in the EU[2]



Our work confirmed the findings of earlier projects: organic statistics and market data are still far from fit for purpose. Some aspects have improved, notably Eurostat's agricultural census data, with the inclusion of organic identifiers for individual farms and relevant variables.

Moving the legislative basis for organic data, from the EU organic regulations to the SAIO Regulation (2022/2379) on agricultural statistics, however, is not leading to better organic data as promised. Key variables on crops in conversion and organic livestock were dropped and data for policy evaluation were focussed on the use of plant protection products. These concerns were also raised by the European Court of Auditors in their 2024 report on organic farming policy.

The Farm Sustainability Data Network (FSDN, formerly FADN) collates farm financial and physical data and some sustainability indicators. Organic farming identifiers allow specific data to be extracted. In many countries organic sample sizes are small, key farm types are missing, and the representativeness of the organic sector is questionable.

Market data on prices, quantities, retail and out-of-home catering sales, and trade are frequently absent. Available data often rely on commercial providers, organic organisations, or national agencies such as Agence Bio (FR) or AMI (DE). European level collation is limited, with the World of Organic Agriculture[2] a notable exception, alongside the Commission's Marketing and Analytical Briefs[3].

[2] World of Organic Agriculture 2026 https://www.organic-world.net/yearbook/yearbook-2026.html
[3] EU Organic Market and Analytical Briefs: https://agriculture.ec.europa.eu/data-and-analysis/sustainability-and-organic-farming/agricultural-markets-organic-sector_en

Development needs and challenges

Previous projects with a direct focus on organic market data, such as EISfOM (2003-2006) and OrganicDataNetwork (2012-14),[4] made detailed recommendations for improving organic market data–many still not implemented. From these and the current project, key areas are:

Production data: Farm and crop areas and livestock numbers are readily available from agricultural censuses and surveys, public administration (IACS), and certification data. There is a need to reduce the duplicate reporting burden on farmers and to streamline data exchange with authorities consistent with data protection requirements. The reduced data availability since the implementation of the SAIO Regulation needs urgent resolution.

Farm financial data, including inputs and outputs, are obtainable from the Farm Sustainability Data Network (FSDN). The problems with small samples, missing farm types and overall representativity of organic samples identified in the project need to be addressed. This may be possible through over-sampling organic farms and adjusting their weighting in aggregate reporting.

Market data are poorly covered across many countries and at EU level. Collaborating with commercial providers, organic organisations and public agencies—ideally through market observatories—would improve coverage and consistency. Timeliness is critical for business decisions, including farmer conversion responses to market slowdowns or recovery.

Trade data within the EU and for exports from the EU are largely absent, making supply balance assessments in support of market development or certification difficult. Import data has improved with the use of Traces and organic shipment certificates. Other countries, including the US, have included an organic identifier digit into the Harmonised System for trade data, an approach which could also be implemented in the EU.

Environmental sustainability data: Research studies provide solid evidence that organic farming makes a positive contribution to environmental sustainability, but they are often site-specific and difficult to extrapolate to wider scales. The proposed Farm Sustainability Compass, with appropriate indicators and quality data, could enable meaningful regional to EU-level benchmarking and policy evaluation.

Digitalisation and data governance provide opportunities for better organic data availability and use including from the potentially data rich certification process. Commission proposals for data governance authorities, unique business IDs and the European Business Wallet could facilitate a better exchange of data between businesses, control bodies and public authorities, and improve statistical collation and analysis.

Policy recommendations

In the long-term, with the organic sector approaching 20-25% of EU agriculture, the **overall aim** should be to ensure there is an organic equivalent for all agricultural and food statistics.

[4] OrganicDataNetwork project: https://www.organicdatanetwork.net/home.html

The EU Commission should prioritise improving the collection, availability, and reporting of organic data, including adapting the relevant legal frameworks, by:

- Reviewing the implementation of the SAIO Regulation to restore conversion, livestock, and other data losses, and to address inconsistences between the various Implementing Regulations.
- Improving trade data availability, also for the internal market, by including an organic identification digit in the Harmonised System codes.
- Establishing an EU Market Observatory for organic market data and encourage related national and regional initiatives in Member States.
- Improving the availability and representativeness of organic farming date in FSDN.
- Including organic-specific environmental sustainability data and research evidence in sustainability benchmarking and the planned Farm Sustainability Compass tool.
- Improving data exchange between organic businesses, control bodies, and public authorities by integrating organic requirements in digitalisation, data governance authorities, unique business IDs, and the European Business Wallet initiatives proposed by the Commission.

Member States should prioritise improving the collection, availability, and reporting of data, by:

- Improving the quality of data and representativity of organic farms in national FSDN datasets.
- Partnering with businesses, commercial data providers and organic sector organisations on national organic market observatories for reliable market data.
- Improving yield and product output data via organic identifiers in crop yield and harvest estimates.
- Ensuring full representation of organic in national statistical reporting, market forecasting, policy modelling, and evaluation activities.

Further information

Lampkin N & Padel S (2026). *Policy recommendations for the delivery of the organic F2F targets by 2030 and beyond.* Deliverable D7.1 OrganicTargets4EU. IFOAM Organics Europe. https://orgprints.org/id/eprint/10862.

Curtiss J, Pignotti D, Lampkin N, & Gocht A. (2026). EU-level CAPRI impact assessment for the organic sector (Deliverable D 3.1; OrganicTargets4EU). IFOAM Organics Europe. https://orgprints.org/id/eprint/56762

Schiavo M. (2025). Modelling results of socio- economic impacts in the organic value chains (Deliverable D4.3 OrganicTargets4EU). IFOAM Organics Europe. https://orgprints.org/id/eprint/56759

OrganicTargets4EU national organic sector factsheets https://organictargets.eu/organic-sector-factsheets/

OrganicTargets4EU policy briefs: https://organictargets.eu/policy-briefs/.

Nicolas Lampkin, Thünen Institute, January 2026

OrganicTargets4EU is funded by the European Union (Grant no. 101060368) and by the Swiss State Secretariat for Education, Research and Innovation (SERI) (Grant no. 22.00155). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union, European Research Executive Agency (REA) or Swiss State Secretariat for Education, Research and Innovation (SERI). Neither the European Union nor any other granting authority can be held responsible for them.

Funded by the European Union

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