United States Department of Agriculture
Foreign Agricultural Service

GAIN
Global Agricultural
Information Network

Voluntary Report – Voluntary - Public Distribution **Date:** February 05, 2026

Report Number: E42026-0008

Report Name: EU Organic Market Rebounds as Inflation Slows

Country: European Union

Post: Berlin

Report Category: Special Certification - Organic/Kosher/Halal

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Report Highlights:

The EU remains the largest overseas market for organic food, with sales reaching $58.5 billion in 2024 and a steady upward trend projected through 2026. Despite inflation-driven setbacks in 2022, the market has rebounded following decreased inflation. Western and Northern European countries continue to drive per capita organic spending, while distribution channels diversify, with both supermarkets and specialty shops expanding their organic offerings. The EU's goal to have 25 percent of farmland under organic cultivation by 2030 remains challenging, as only Austria has over 25 percent of farmland under organic production.

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.

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Summary

The United States (U.S.) - European Union (EU) organic equivalency arrangement went into effect on June 1, 2012. This streamlined trade between the world's two largest organic markets as it enabled organic food and agricultural products certified in the United States or the EU to be labeled and sold as organic in either market. Due to a lack of organic specific HS codes, it is difficult to exactly track trade in these products.

The United States and the European Union (EU) are the world's largest organic markets, with both regions experiencing sustained growth in organic food sales. In 2024, the EU organic market reached an estimated $58.5 billion, a 3 percent increase from the previous year. Sales are expected to continue to increase in 2026. The COVID-19 pandemic initially boosted organic sales as consumers prioritized perceived health and sustainability benefits, but high inflation in 2022 led to a temporary decline in demand, particularly in the EU. Recovery began in 2023, with modest growth expected to continue, supported by economic improvement as well as increased availability of organic products in mainstream and discount supermarkets.

Distribution patterns vary across EU member states, with full-range supermarkets dominating in some countries and specialty organic shops playing a significant role in others. Per capita organic expenditures are highest in Western and Northern Europe, while less is spent on organic food in Eastern European countries. Most of the EU's organic farmland lies in Spain, France, Italy, and Germany. Austria has the highest percentage of organic farmland in the EU.

U.S. organic exports, valued at $822 million in 2024, primarily flow to Canada, Mexico, and select Asian markets, with the EU accounting for a smaller but growing share. The value of exports is most likely higher, as Harmonized System (HS) codes only cover a fraction of organic trade. Existing HS codes primarily cover fresh organic products like milk, fruits, and vegetables, but do not currently exist for most processed products or organic nuts. The U.S.-EU Organic Equivalency Arrangement, which has facilitated trade since 2012, is set to expire by 2027 due to new EU regulations, prompting ongoing negotiations to establish a new trade agreement. A new proposal published by the European Commission aims to postpone this deadline by 10 years.

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 2026 will be held in Nuremburg Germany, February 10-13, 2026. BioFach is an USDA-endorsed trade show.

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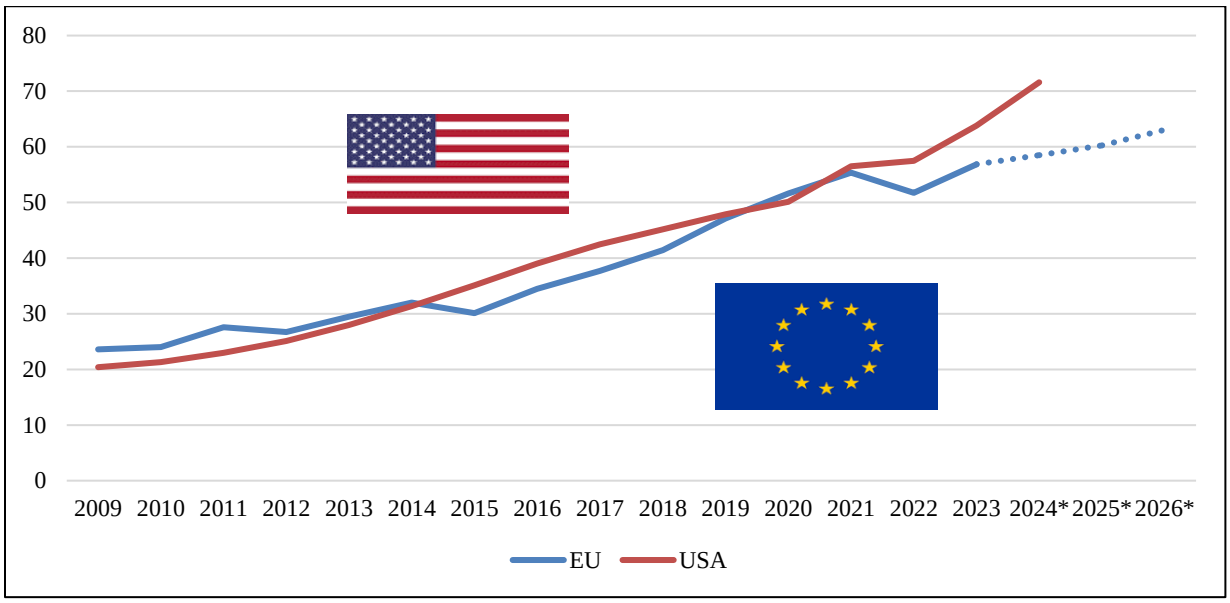
Section I The EU Organic Agricultural Market and Production

The United States and the EU are the world's largest organic markets. Both have shown high growth rates in the last few years with the United States becoming the leading global organic food market in 2012. Both markets show a long-term upward trend.

Due to a lack of organic-specific HS codes[1] for many organic products, it is difficult to exactly track trade in these products. FAS offices in the EU estimate the EU organic market totaled $58.5 billion (€50 billion) in 2024. This amounts to a total sales increase of almost 3 percent year-on-year. For 2025, FAS Posts estimate sales will grow at a similar rate reaching $62.7 billion (€53.8 billion). In 2024, U.S. domestic sales of organic products reached $71.6 billion, a 5.2 percent annual growth rate. Food sales made up $65.4 billion of total organic sales.[2]

[1] The Harmonized Commodity Description and Coding System, also known as the Harmonized System (HS) is a standardized international system to classify traded products.
[2] https://ota.com/market-analysis/organic-industry-survey/2024-organic-industry-survey.

Figure 1: Organic Food Sales in the United States and the European Union (in billion USD)



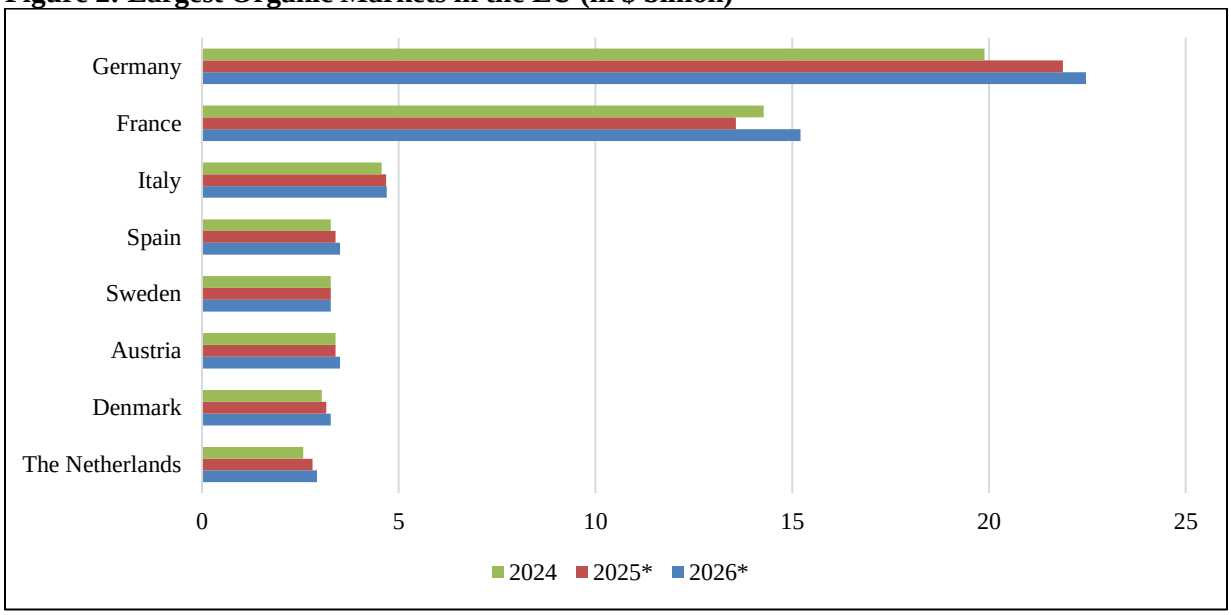
Source: Organic Trade Association, USDA/FAS Posts in the EU, *USDA/FAS Posts in EU estimates

At the onset of the COVID-19 pandemic, organic sales increased as consumers sought foods they considered healthier, more sustainable, and environmentally friendly. However, in 2022, this trend shifted significantly due to high inflation and reduced disposable income across most EU member states, with demand and sales declining for the first time since 2014.[3] In 2023, the market for organics began to recover, and sales increased slightly. FAS Posts estimate a modest upward trend in EU organic sales for 2024 and 2025, but at a slower pace than before 2022. A continuing upward trend is forecast for 2026. This increase is attributed to the recovering EU economy, which is stimulating consumer purchases of more organic food and beverage products. Furthermore, higher prices (resulting in increased sales value), the growing popularity of store-brand organic products, and the expanded availability of organic items in discount supermarkets are expected to further boost organic sales.

Due to a general shift towards increased health awareness in the EU, there has been a surge in demand for food that is perceived as especially healthy, such as organic food. Many local sources note higher organic production is highly dependent on government backing and support. This is given in the EU through the Farm to Fork Strategy, for example. For more information on policies, please see Section III and IV.

[3] https://www.eea.europa.eu/en/analysis/indicators/agricultural-area-used-for-organic

Figure 2: Largest Organic Markets in the EU (in $ billion)



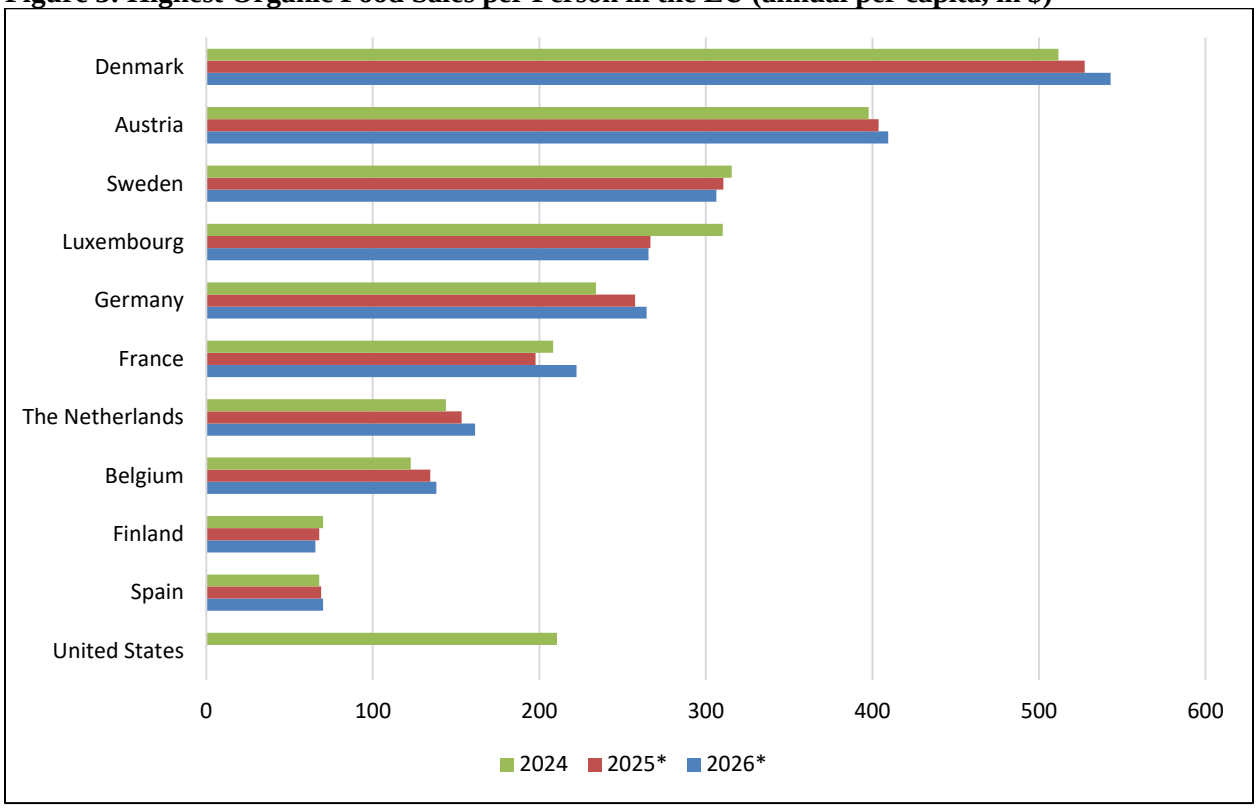
Source: USDA/FAS Posts in EU, 2025* and 2026* are USDA/FAS Post estimates and forecasts

Final numbers for 2025 are not yet available at the time of publication. FAS Post data from 2024 shows that most markets in EU member states grew from 2023. Most large EU organic markets are predicted to continue to grow in 2025 and 2026, except for Sweden where high inflation continued to cause consumers to be more price sensitive. Very slight downward trends are expected in Finland, Luxembourg and Greece due to worsening economic conditions for consumers.

An important driver behind the organic market in the EU is the predominance of large full-range supermarket chains. These chains place organic products on the shelves next to conventional products, resulting in 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-range supermarkets. The distribution of organic products differs considerably between member states. In Denmark, Sweden, Germany and Austria, full-range supermarkets dominate the distribution of organic products. In Italy, the Netherlands, France, Belgium, Poland, and Lithuania, the market share between full-range supermarkets and organic specialty shops is more evenly distributed.

In 2024, the countries with the highest organic sales per person and year (totaling $100 or more) were Denmark, Austria, Sweden, Luxemburg, France, Germany, the Netherlands, and Belgium. Expenditures for organic products vary significantly throughout the EU. While the EU includes countries with very high per capita expenditures for organic products, there were about 10 member states, mainly in Eastern Europe, with sales of less than $10 per person. At $204.2, the United States has the fifth largest expenditures per capita in comparison to EU Member States.

Figure 3: Highest Organic Food Sales per Person in the EU (annual per capita, in $)



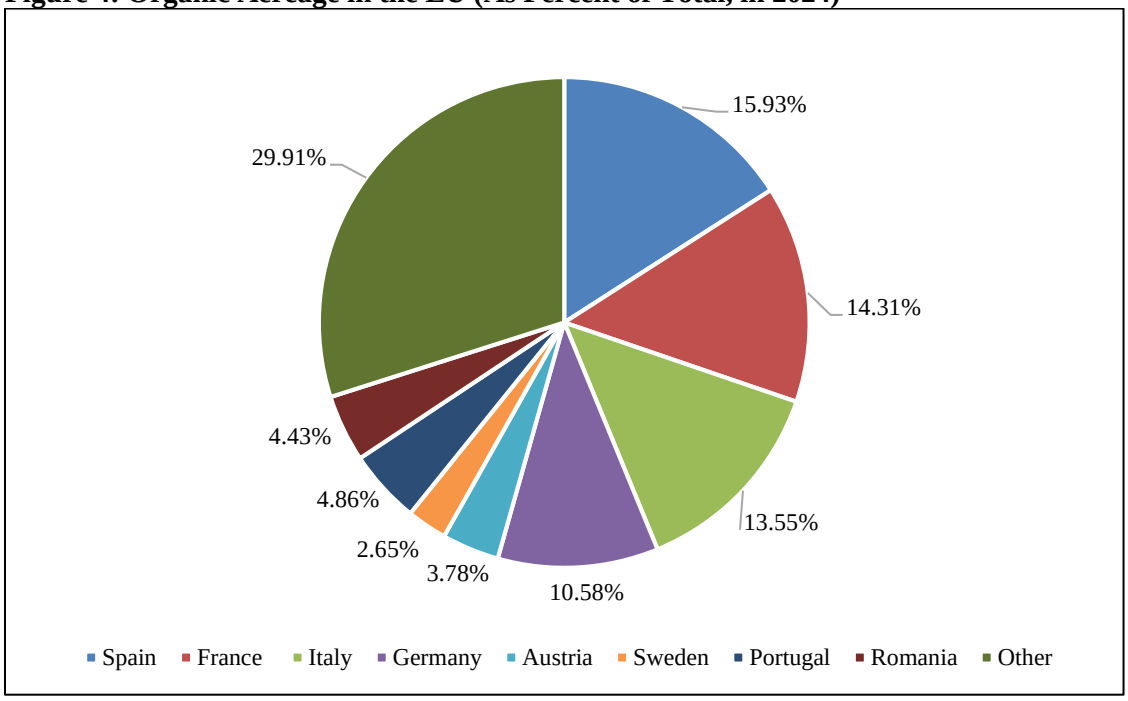
Source: Organic Trade Association (OTA), U.S. Census, USDA/FAS Posts in EU, 2025* and 2026* are USDA/FAS Post estimates and forecasts

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 was small, it grew during the COVID-19 pandemic and now accounts for almost half of the EU's organic sales. This group tends to buy at organic specialty shops or farmers' markets and price is not the deciding factor in making a purchasing decision.

The second group represents a different demographic. Double-income households with no children, older consumers (aged 50-75), parents with small children, and new trend seekers fall into this group. They buy organic products for various reasons, including perceived health and food safety concerns, animal welfare, sustainability, quality, perceived taste, and innovative packaging. This so-called 'light buyers' group purchases organic products both at full-range supermarkets and in specialty shops. This is the group that shifted consumption patterns the most in 2022, buying less organic food than the year before.

The largest shares of total EU organic farmland are in Spain, France, Italy and Germany. These four Member States account for over 60 percent of total organic agricultural land in the EU.

Figure 4: Organic Acreage in the EU (As Percent of Total, in 2024)



Source: USDA/FAS Posts in EU

For 2025, FAS EU Posts estimate a 1.2 percent increase from 18.3 million hectares in 2024 to 18.5 million hectares in 2025. Organic farmland and production appear to be growing slower than demand, creating potential export opportunities for U.S. companies. FAS posts in the EU expect organic area to either increase or stagnate in all member states through 2024 and 2025, except in France and Sweden, where it is expected to decrease marginally. In Sweden, the acreage is lower due to low producer prices for organic farmers, causing many farmers to switch to conventional production. In France, organic area has slightly decreased due to a decrease in consumer demand caused by high inflation. In 2026, an increase in organic area of about 1.5 percent is expected in the EU in comparison to 2025.

The EU has set a goal of reaching 25 percent of total farmland under organic production by 2030.[4] In 2025, Austria remains the only member state to achieve this goal. FAS EU Posts forecast this to continue for 2026, as there are no significant changes expected in organic acreage within the EU large enough to meet this goal.

EU organic land is split between arable crops (43 percent) and permanent grassland (42 percent).[5] The largest arable crop groups are green fodder and cereal production with the largest areas found in France, Italy and Germany. Over 13 percent of organic area is used to grow permanent crops, of which almost three-fourths is in Spain, Italy, and France. Most of this land is used to produce olives, grapes, and nuts. The proportion of agricultural land farmed organically differs widely between EU Member States. For 2024, the highest share of area dedicated to organic farming is reported in Austria, followed by Estonia.

[4] https://www.eea.europa.eu/en/analysis/indicators/agricultural-area-used-for-organic.
[5] https://www.fibl.org/en/shop-en/1797-organic-world-2025.

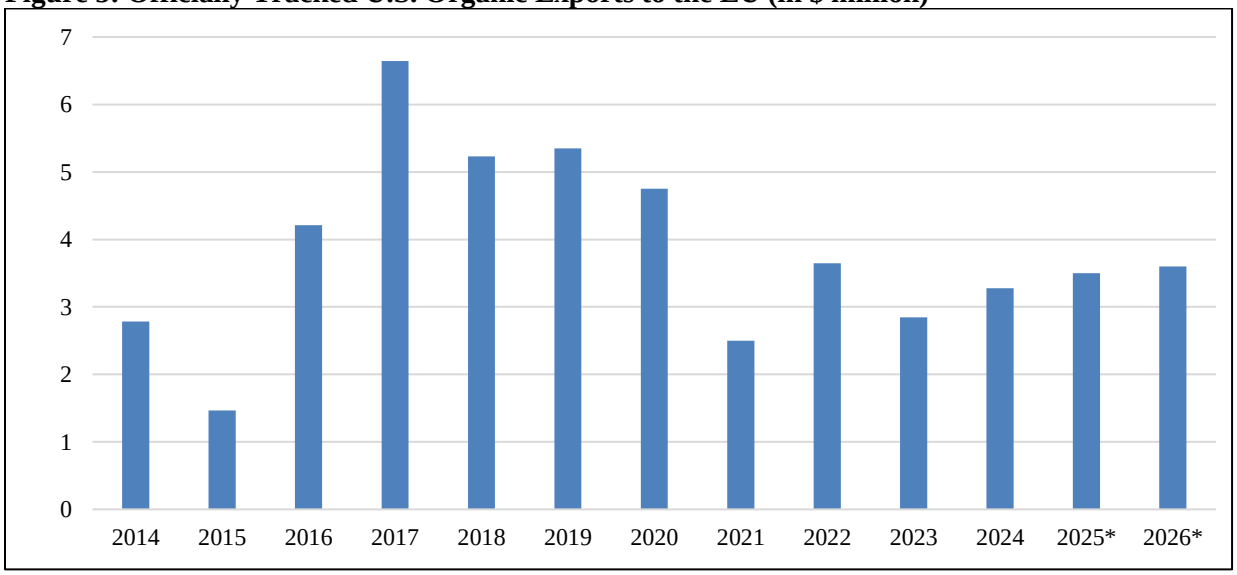
Section II Exports of U.S. Organic Food

In 2024, global U.S. organic food exports were officially valued at $822 million, an almost 19 percent year-on-year increase. Canada and Mexico are still by far the largest markets for U.S. exports, followed by South Korea, Taiwan, and Japan. For January through September 2025, total exports are valued at $588 million with no major shifts to destination countries from 2024. Tracking of organic food exports only began in 2011 and the current "Harmonized System" (HS)[6] codes for organic products cover only a fraction of total organic trade. 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 than what is covered by these codes. The source of the following trade data is the U.S. Census Bureau Trade Data[7] retrieved from USDA's Global Agricultural Trade System Online (GATS).[8] Please see Annex I for further information on the HS tariff codes for organic products.

Select U.S. Organic Exports to EU

After a significant decline in 2021, exports of HS-tracked U.S. organic products to the EU rebounded to $3.6 million in 2022. In 2023, these organic product exports to the EU again declined by about 20 percent compared to the previous year at $2.9 million. In 2024, U.S. organic exports to the EU increased by 15 percent to almost $3.3 million. From January through September 2025, U.S. organic exports to the EU totaled $2.5 million, a slight increase in comparison to the same timeframe in 2024. A slight increase in exports to the EU is expected for 2025 and 2026 due to the recovery of the EU organic market and demand exceeding production.

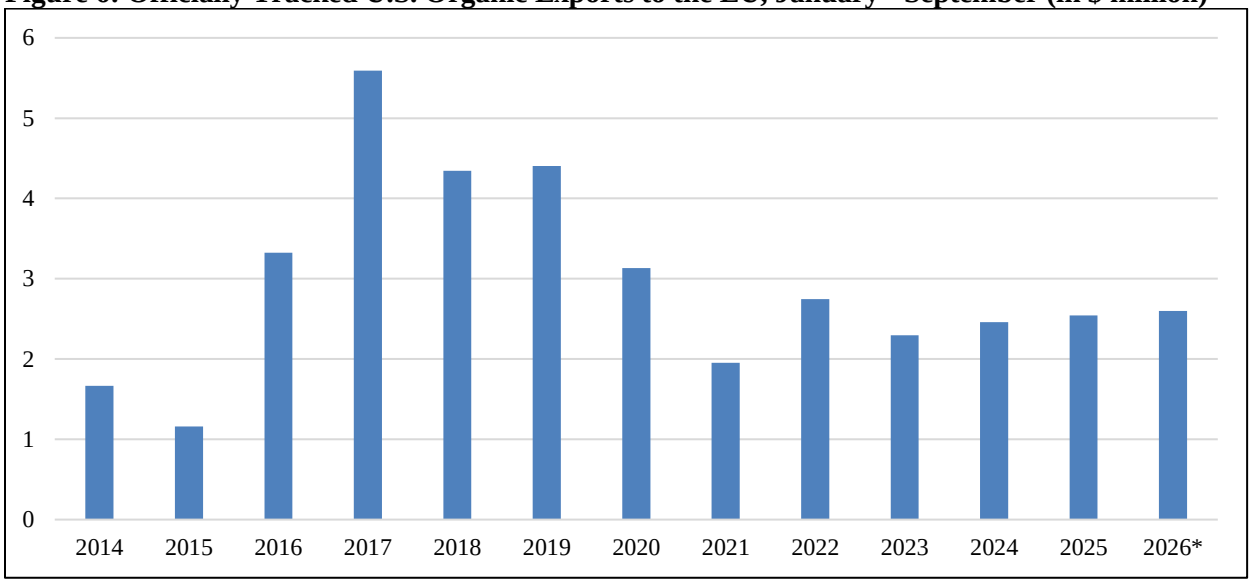
Figure 5: Officially Tracked U.S. Organic Exports to the EU (in $ million)



Source: U.S. Census Bureau Trade Data, *FAS estimate

[6] The Harmonized Commodity Description and Coding System, also known as the Harmonized System (HS) is a standardized international system to classify traded products.
[7] https://www.census.gov/foreign-trade/index.html.
[8] https://apps.fas.usda.gov/gats/default.aspx.

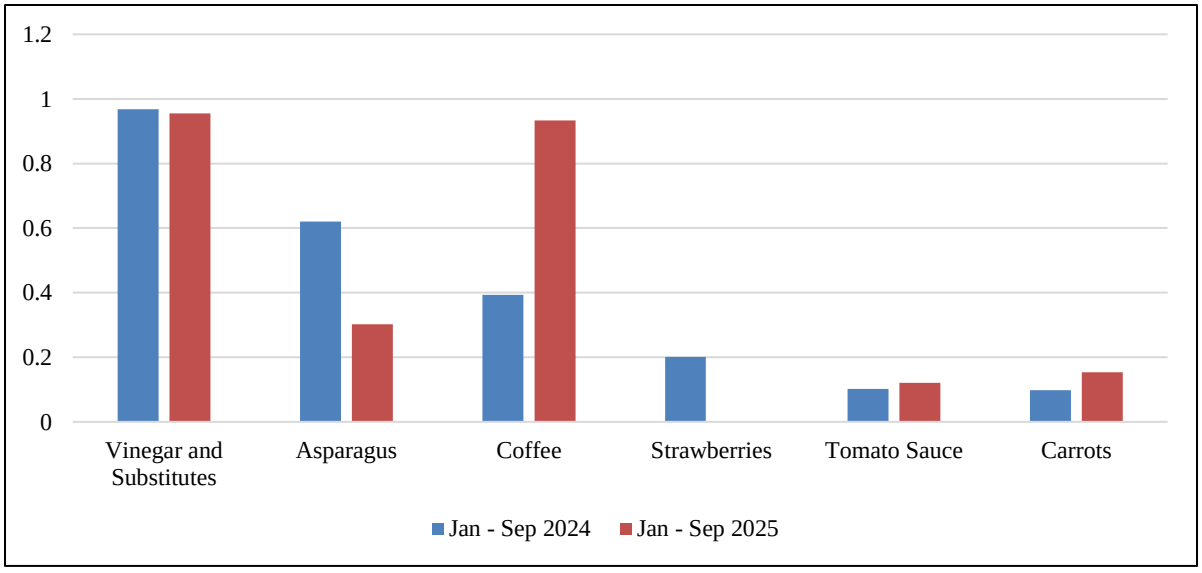
Figure 6: Officially Tracked U.S. Organic Exports to the EU, January - September (in $ million)



Source: U.S. Census Bureau Trade Data, *FAS estimate

From January through September 2025, the top exported organic goods from the U.S. to the EU were vinegar, coffee, asparagus, carrots, and tomato sauce. Organic coffee exports increased by 138 percent year-on-year between January and September. Organic asparagus exports decreased over 50 percent year-on-year. Exports of organic carrots increased by over 57 percent. The United States' top organic product exports to the EU frequently change from year to year. This is due to price fluctuations and the supply situation in the United States, as well as the demand situation 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 local supply is lower and for products which are significantly produced in the EU.

Figure 7: Top U.S. Organic Exports to the EU (in million $)



Source: U.S. Census Bureau Trade Data, *FAS estimate

The United Kingdom exited the European Customs Union in January 2021. Prior to this, it had been the largest importer of select U.S. organic products to the EU. In 2024, Belgium and the Netherlands were the top importers of U.S. organic products within the remaining EU-27. Imports increased by 36 percent in the Netherlands and decreased by 34 percent in Belgium year-on-year. These countries are followed by Germany, Ireland, and Sweden. These five countries together account for about 85 percent of 2024 U.S. organic exports to the EU. Major EU importers act as distributors and transship organic products to other EU member states.

Section III The EU-U.S. Organic Equivalency Arrangement

The EU and the United States signed the EU-U.S. Organic Equivalency Arrangement[8] 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 U.S. organic farmers and businesses access to a growing combined market.

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 requires 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, Switzerland and the United Kingdom have signed organic equivalence trade agreements with the EU.[10]

On October 4, 2024, the European Court of Justice of the European Union published a judgement[9] in Case C-240/23 Herbaria Kräuterparadies II noting that the EU Organic Regulation prohibits the use of the EU organic logo on products manufactured in third countries if they do not strictly follow EU organic rules, even if the third country has an equivalency arrangement.

On December 16, 2025, the European Commission published a proposal to revise the EU Organic Regulation. The aspects of the proposal that will impact the EU's Organic Equivalency Arrangement with United States include the Commission's effort to postpone the deadline for the transformation of equivalency arrangements into trade agreements, currently set for December 31, 2026, to December 31, 2036, and the Commission's proposal to adapt rules on labelling of organic products imported from third countries. For more information, please see the end of Section IV.

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 and the Regulation entered into force on January 1, 2022. The new Organic Regulation introduces regulatory changes for both the production of organic products in the European Union and for imported organics.

In July 2024, the European Commission published a Frequently Asked Questions document on organic rules under Regulation 2018/848. It can be downloaded here: https://agriculture.ec.europa.eu/system/files/2023-11/organic-rules-faqs_en.pdf

Scope

The scope of the 2018 organic rules was 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

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 percent of the ingredients of agricultural origin are organic. For products containing less than 95 percent 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 (pictured above) is mandatory on all pre-packaged organic products produced in the EU. Since September 2024, the EU organic logo can also be used in black and white; the technical specificities are laid down in Implementing Regulation 2024/2867.[1] 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 (EU) 2018/848,[2] 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 number 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[3] 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.

Organic Pet Food

In October 2023, the European Union adopted Regulation 2023/2419[4] on the labeling of organic pet food. Under this regulation pet food can now be labeled with the EU organic production logo if 95 percent of its agricultural ingredients are organic. The new rules make the EU organic production logo mandatory for prepacked organic pet food. For more information, please see GAIN Report: EU Adopts New Rules for Organic Pet Food.

Certification

The EU has implemented a system of electronic Certificates of Inspection (COI) for imports of organic products in the EU. The COI has to be issued by the relevant control authority or control body before a consignment leaves a third country of export or origin. Commission Regulation 2021/2306[5] allows the information contained in the transport document to be checked and included in the certificate of inspection by the relevant control authority or control body within a maximum 10 days from the issuance of the certificate, as long as it is before the endorsement of the certificate by Member State's authorities.

More information is available here:

- EU Commission Organics Page.[6]
- Commission Notice Questions and answers on the application of EU rules on import controls on products from third countries intended to be placed on the EU market as organic products or in-conversion products.[7]

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.[8] 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 percent 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[9] 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.

An October 2025 report by the European Environment Agency found that the share of the EU's agricultural land under organic farming increased from 5.9 percent in 2012 to 10.8 percent in 2023. This pace would need to more than double in the remaining years up to 2030 in order to meet the target.

Proposed Revisions to the EU Organic Regulation

On December 16, 2025, the European Commission published a proposal to revise the EU Organic Regulation. In addition to the legislative proposal, the Commission published a roadmap for further actions aimed at reviewing additional elements of the organic legal framework, notably organic secondary legislation. The review aims to focus on specific issues that are considered to represent a burden for EU farmers and other operators.

As part of the proposal, the Commission proposes to postpone the deadline for countries to convert certification equivalence recognition to trade agreements from December 31, 2026, to December 31, 2036, to allow for further technical exchanges with third countries.

The Commission also proposed changes to rules regarding the use of the EU organic logo in light of the judgement of the of Court Justice of the European Union (ECJ) in Case C-240/23 Herbaria Kräuterparadies II. To comply with the ruling, the Commission proposes allowing the use of the EU logo only if the products from the third country, already covered by an equivalency arrangement, comply with additional production and control requirements. These new requirements are listed in Annex VII. The new rules on the use of the EU organic logo will also apply to organic products made in the EU if more than 5 percent of the ingredients come from a third country.

The Commission's proposal represents the start of the EU legislative process. Changes to the proposal can be made by both the Council of the European Union and the European Parliament as part of the approval process.

For more information about the proposal, please see the GAIN Report EU Commission Proposes Revisions to EU Organics Regulation.

Section V Market Development

The Organic Trade Association (OTA), the leading organic association for the entire organic supply chain in the United States, 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 it assists the U.S. organic industry can be found at https://ota.com/.

In addition to the OTA, there are various other trade associations that can help promote organic commodities in the EU. An overview of U.S. commodity industry cooperators can be found at https://www.fas.usda.gov/topics/getting-started. 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, based in Nuremburg, Germany, is the largest international trade show for organic products in the world. BioFach is a USDA-endorsed show. More information about BioFach can be found at https://www.biofach.de/en.

The Nordic Organic Food Fair, which takes place in Malmö, Sweden provides an excellent platform for U.S. companies that wish to sell organic, as well as sustainable certified food products and beverages to buyers based in the Nordic region. Detailed information about the trade show can be found at www.nordicorganicexpo.com.

Fruit Logistica (https://www.fruitlogistica.com/en/) is a regional (European) trade show based in Berlin, Germany that also attracts buyers of organic fresh produce, nuts, and dried fruits from around the world. This show is also USDA-endorsed with a 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 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[9] for more information.

[9] https://www.fas.usda.gov/international-offices

Finally, trade shows like ANUGA[10] or SIAL[11] attract mainly buyers of specialty and retail-ready products and are therefore suited for exporters of U.S. organic processed products like confectionary products, snacks, and baby food.

Section VI 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 Agricultural Marketing Service: https://www.ams.usda.gov/services/organic-certification.

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

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Annex I Current list of U.S. Organic Export HS codes

Organic HS codes were first introduced to the Harmonized Tariff Schedule of the United States in 2011. The list of organic product groups tracked in the HS system has expanded over time, with the last addition of organic HS codes to the system in 2018. The Harmonized Tariff Schedule 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 trade data reported in HS organic codes. Less than four dozen organic products for U.S. exports have their own classification coding. All other organic products are classified the same as conventional alternatives. Despite this, the HS system provides a useful tool for tracking covered products and to track the export dynamics for those specific products.

[10] https://www.anuga.com/
[11] https://www.sialparis.com/en

Table 1: 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	1/1/2011
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
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):

https://apps.fas.usda.gov/gats/default.aspx?publish=1 by running a standard query and selecting "Organics-Selected" under "Product Groups".

Annex II EU Organic Single Country Markets

The Foreign Agricultural Service produces country reports on the organic markets in select European Union (EU) member states. These reports can be downloaded from the GAIN[12] website.

Please also see below summaries for EU markets:

Austria
With over 27 percent of total agricultural area under organic management, Austria remains an important organic player with respect to production, domestic consumption, and as a supplier to neighboring EU countries. After showing signs of stagnation in 2023, the Austrian organic market is once again growing in 2024 and 2025. With a volume share of 13 percent of all food purchases, the organic market share in Austria reached a new high in 2024. Organic products are firmly established, especially for drinking milk, yogurt, flour, and eggs. Demand for organic meat is also steadily increasing, despite price differences between organic and conventional products. Compared to 2023, sales in the organic meat segment increased by 12 percent year-on-year. Overall, the volume share of organic food in Austria increased by 5.5 percent and the value share by 3.7 percent in 2024 compared to the previous year. This growing trend is expected to remain in 2025. Austrian households spend an average of $405 annually on organic products.

Belgium
Organic farming in Belgium is expected to continue to grow in 2026, with a focus on achieving EU targets. The area in Flanders exceeded 10,000 hectares (ha) in 2024, a 2.5 percent increase year-on-year. With continued demand for sustainable products and support from EU policy, a further increase in the market value of organic products is expected in 2026 and the trends for both area and market value point to continued growth in Belgian organic agriculture. Consumption of organic products in Belgium is expected to continue growing in 2026, driven by increased awareness, support measures, and marketing efforts, although price remains an important factor in consumers' purchasing decisions.

Bulgaria
Bulgarian organic area increased sharply in 2024, up 34 percent compared to 2023. As a percentage of total agricultural area, organic land share grew from 2.95 percent in 2023 to 3.95 percent in 2024. Following years of decline in organic area from 2016 to 2021, this trend reversed in 2022, and area has increased since then. Growth in the last three years was due to recertification of some organic farms and more favorable domestic support. According to local sources, area continued to expand in 2025, and it is estimated to exceed 4 percent of total agricultural land.

The share of fully converted and certified organic land expanded 31 percent to 78,624 ha in 2024 compared to 2023. The share of certified land totaled 40 percent in 2024 and 2023 compared to 55 percent in 2022 due to an influx of new organic producers. This led to more land under conversion. It is expected that this trend will be more pronounced in 2025 due to more domestic support funds encouraging new players to convert to organic production.

The number of organic operators increased in 2024 12.3 percent compared to 2023. The majority of operators were farmers. Organic farmers grew by 12.1 percent from 4,438 in 2023 to 4,978 in 2024. Organic agricultural producers accounted for 7.3 percent of all registered farmers in 2024 compared to 6.5 percent in 2023.

[12] https://gain.fas.usda.gov/#/

About 57 percent of organic area consists of hayfields and pastures, followed by orchards at 12 percent, and grain fields at 15 percent. Positive changes were also reported for organic dairy farms. The number of cattle raised at organic farms increased by 33 percent in 2024 vs 2023 while sheep grew by 82 percent over the same period. The number of organic beehives also increased, reaching 31 percent of total beehives.

Organic food sales account for roughly 1.2 percent of total food sales (roughly $12/capita for 2024). Local sources expect this share may reach 1.7 percent in 2026. Locally produced organic products include fresh produce, honey, juices, and dairy, while baby food, pasta, tea, coffee, meat, and snacks are largely imported.

Croatia
Croatia's organic food market, though small, is emerging and currently dominated by imported products. Export opportunities exist in fresh produce, dried fruits and nuts, specialty grains, and processed goods. For price-sensitive Croatian consumers, affordability, availability, and variety are key factors driving purchases. Meanwhile, domestic organic production continues to grow steadily. As of 2023, organic farming covered approximately 119,873 ha, representing 8.1 percent of Croatia's total utilized agricultural area. This is a significant increase from just 23,285 ha in 2010.

Denmark
The organic market in Denmark (valued at $3.1 billion as of 2024) is one of the larger organic markets within the European Union (EU), mainly due to its high per capita consumption of organic products (valued at $522 in 2024).

Denmark has the world's highest organic share of total food consumption (an estimated 12 percent). Organic sales in Denmark increased about 7.4 percent in 2024 after the market declined slightly in 2023 due to high inflation and an overall high cost of living.

On average, 66 percent of the population buys organic products every week. Fresh produce makes up more than one third of organic retail sales at retail and constitutes the largest organic product category. This is followed by dairy, that makes up one fifth of organic sales. Over 80 percent of organic sales occur in the retail sector.

Denmark was the first country to establish rules for organic production and control and to implement an organic label. The unique and governmentally certified Ø-label has been very important for the widespread success that organic food products have achieved in Denmark. Almost every Dane recognizes the Danish organic label. Sales of organic products are expected to remain strong in 2024 and 2025 due to keen interest in healthy, nutritious, and sustainably produced food products combined with a general trust in the Ø-label. There is a loyal group of Danish consumers that prioritize organic products and the values behind that choice, independent of prices.

Estonia
In 2025, the amount of land under organic farming decreased, halting a decade-long upward trend. While the country’s organic production is relatively small by volume, Estonia is second only to Austria in terms of the share of agricultural land under organic production, with 22 percent of land producing organic products. Low export prices for organic grains and weakened consumer demand resulting from the deteriorating economic situation of households have diminished farmer interest in organic cultivation over the past two years. According to Estonian farmers and economists, support under the EU Common Agricultural Policy (EU CAP) scheme was insufficient to cover the additional costs and income reductions associated with organic farming.

Finland
In 2024, Finland maintained approximately 309,000 ha of certified organic farmland, accounting for almost 14 percent of the nation's total agricultural land. The area of organic farmland remained stable compared to the previous year. The number of organic farms was almost 4,000, making up about 10 percent of all farms in Finland. The average size of organic farms continued to grow, reaching 77.5 ha.

The organic market faced challenges in 2024, with grocery store sales declining 5 percent to $394 million, representing 1.8 percent of total grocery retail sales. This decline was primarily due to decreased demand for organic milk, dairy products, fruits, and vegetables. Conversely, organic baby food experienced growth, achieving a record market share of 25 percent of total sales. Sales of organic alcoholic beverages, sold through Finland's alcohol monopoly Alko, decreased by 8.5 percent compared to the previous year. The use of organic products in public kitchens continued to rise, with 63 percent of public kitchens reporting daily use of at least some organic products.

Thirty-one percent of all consumers (mainly women, highly educated people, and people living in the metropolitan area) buy organic products weekly and another 29 percent do so monthly. Families with children are also an important group of organic consumers: 35 percent of them buy organic actively. Seventy percent of Finns recognize the EU organic label by its name or logo when they see it.

The average size of organic farms continued to grow for the ninth consecutive year, indicating a trend towards larger-scale organic farming operations. Public kitchens remain an important driver for demand, particularly in schools and daycare centers.

France
The French organic food market was valued at approximately $14.5 billion in 2024, according to Agence Bio and market research firms such as Xerfi Specific. This represents modest growth of around 0.8 percent in value. Consumption volumes remain below pre-inflation levels, reflecting ongoing price sensitivity among consumers. The market is primarily driven by at-home consumption. The market is expected to have contracted slightly in 2025, with a projected value around $13.8 billion, as household purchasing power continues to face pressure. By 2026, however, the sector is anticipated to rebound to approximately $15.5 billion, supported by easing inflation and renewed consumer confidence. The trajectory of the French organic market is shaped by a combination of economic, structural, and policy factors. High prices and persistent inflation have constrained demand, making any reduction in inflation a critical factor for stimulating growth. Production dynamics, including a decline in organic farmland and farmer "deconversions," may limit supply and restrict expansion. Policy support remains essential, with government initiatives and EU sustainability programs—such as Loi Egalim and conversion aid—playing a pivotal role in sustaining the market. Equally important is consumer confidence, as the willingness to pay a premium for organic products depends on broader economic stability. Taken together, these elements suggest that while the market faces notable challenges, a gradual recovery is plausible by 2026.

Germany
Germany is the world's second-largest market for organic products, with sales rebounding after inflation-related declines and expected to reach a record $22.3 billion in 2025. German consumers are committed to purchasing organic products, but high inflation has shifted purchases from organic-only retailers to discount supermarkets and drugstores. Full-range supermarkets hold the largest market share for organic sales, followed by discount supermarkets and drugstores, while dedicated organic retailers account for 19 percent. The organic sector is growing faster than the overall food sector, with organic products projected to make up 6.9 percent of total food sales in 2025. After 2025 snap elections, the new coalition government values organic and conventional farming equally, with plans to support organic agriculture through research and education. Organic farmland has grown slowly, now representing 11.5 percent of total agricultural land, but the number of organic farms has slightly

declined due to retirements and lack of successors. Demand for organic products outpaces domestic supply, increasing reliance on imports, especially for eggs, grains, and exotic fruits. Sales of organic dry goods and private label products have surged, while fresh produce sales have been affected by weather extremes. U.S. organic exports to Germany remain volatile, with trade data showing fluctuating volumes and product types, influenced by market conditions and global events.

Greece
Organic area remained flat in 2025. Approximately 650,000 ha are cultivated organically in Greece. Inflation is having a downward effect on organic produce sales due to a combination of increasing input prices and transportation and storage costs. Greek consumers continued to struggle with a domestic economic recession, high unemployment rates and shrinking disposable incomes at the end of 2025. Greeks remain price sensitive and frugal in their spending, trying to save money whenever possible. This pushed consumers away from organic food, given the significantly higher retail price of organic products, after a positive uptick during the pandemic.

Hungary
Following a five-year co-financed support program, the area of organic farmland in Hungary significantly increased in 2019 by 44 percent, to 303,190 ha. This area grew modestly to 320,251 ha by 2023, before declining to 308,023 ha in 2024 upon the support program's conclusion.

In 2024, organic farms accounted for 6.1 percent of Hungary's total agricultural land (5.07 million ha). Pastures comprised 55 percent of organic fields (169,939 ha), arable crop production represented 36.4 percent (112,124 ha), and fruit production constituted 6.1 percent (18,936 ha).

Consumer decisions in the import-reliant organic market are primarily influenced by price sensitivity, though health and environmental considerations often take precedence.

At the end of 2024, Hungary launched a new grant application call to support organic farming from January 1, 2025 to December 31, 2029. Furthermore, the Ministry of Agriculture stated that the government would provide 80 percent co-financing for rural development grants and subsidies during the 2021-2027 multiannual financial period. Hungary is committed to expanding organic farming to 10 percent of its total agricultural area (504,000 ha) by 2027.

Ireland
Based on the first seven and a half months of the year, growth in the value of sales in the Irish market for organic food and drinks (up around 11 percent) appears to be surpassing sales growth in 2024 (5 percent). Sale volumes of organic produce are, however, down almost 5 percent in the same initial period of 2025. While food price inflation is likely contributing to some of this divergence between value and volume, it is anticipated that Irish consumers are purchasing more expensive/premium items, such as meat.

There are around 5,500 farmers in Ireland registered under the Organic Farming Scheme (OFS), more than twice the number from 2020. In 2025, the proportion of agricultural land under organic production stands at around 5.5 percent. Funding for the OFS has been reduced from $78 million in 2025 to $68 million in 2026, back to roughly the 2024 level. Media reports suggest that this reduction in funding will not have an effect on existing commitments as the level of payments are reducing as more farmers transfer from the conversion stage, which offers a higher per ha payment, to the full organic status stage. The focus for the 2026 scheme is tillage/cropping to service demand for organic oats and feedstocks for livestock farmers. Applications for the 2026 scheme close on December 12, 2025 and the definitive area coverage of new scheme uptake will only be confirmed after reconciling with the income support applications in May.

The ‘National Irish Organic Strategy’, published in September 2024, continues to provide the roadmap for growth within the organic food and farming sector, setting out a series of ambitious targets. These include the expansion of wholesale output to reach $868 million by 2030 and a significant associated increase in livestock and tillage area under organic production systems.

Italy
In 2024, Italy maintained its position as a leader in organic agriculture, with over 2.51 million ha of certified organic farmland, accounting for 20.2 percent of the total agricultural area. The country's organic food sales in large-scale retail reached $4.6 billion, marking a 2.9 percent increase from the previous year. In 2024, organic product sales in Italy increased across most categories, with significant growth seen in vegetable oils and fats, fresh eggs, honey, cereals, non-alcoholic beverages, vegetables, and fruit. Conversely, cured meats and meats experienced drops of 19.1 percent and 3.5 percent, respectively.

Modern retail channels lead distribution for organic products, accounting for 64.7 percent of total sales. Traditional retail outlets remain consumers’ preferred channel for organic purchases in the dairy, fruit and vegetable, and honey segments, representing 20.4 percent of total sales; however, this channel recorded a decline of more than one percentage point compared with 2023. Meanwhile, discount retailers continue to gain ground, reaching a 14.9 percent share of organic product sales and further narrowing the gap with traditional stores.

Latvia
In 2025, the area farmed by organic farmers reached 324,000 ha, increasing by 18,000 ha from last year. Organically farmed land accounts for 16 percent of agricultural land, one of the highest shares in the EU.

Structural changes are taking place in organic agriculture - there is tendency to decrease the number of small farms (0-30 ha) and their managed area, while the number and managed area of large farms (100 ha and more) have been significantly increasing in recent years.

Lithuania
Top-selling organic products include bread and cereal products, milk and dairy products and vegetables.

Luxembourg
Luxembourg will remain one of the leading European countries in per capita consumption in 2026. Per capita spending on organic products is significantly higher than in neighboring countries at $270 per inhabitant per year as of 2023. Although consumption is very high, local production lags and many organic products (such as vegetables, fruit, and eggs) are largely imported. At the end of December 2025, the government presented the new national action plan PAN-Bio 2030, which sets the course for 2026 and beyond.

The Netherlands
In 2024, turnover of organic sales increased by 10 percent to $2.6 billion most of which ($1.7 billion) was generated at supermarkets. The remainder was generated at foodservice outlets ($353 million) and specialized stores ($547 million). On average the Dutch spend about 4 percent of their food and beverages spending on certified organic foodstuffs. Organic per capita spending in the Netherlands is estimated at $146 per year. Almost a quarter of total spending on organics was spent on potatoes, fruit, and vegetables alone. Dairy sales totaled $433 million and shelf stable and composite products $388 million. Sales of organic beverages and meat were valued at respectively $301 million and $242 million.

Rising costs of living are still driving consumers to purchase (often cheaper) conventional food and slowing organic sales growth. All in all, organic products tend to be 50 percent more expensive than conventional alternatives.

In 2024, the Ministry of Agriculture started an organic campaign for consumers. The campaign informs consumers about organic benefits and what the European organic quality mark entails. To inspire consumers, a commercial can be seen on television and online and the website allesoverbiologisch.nl has been created. The consumer campaign is part of the ministry's Organic Action Plan.

The acreage of land used to produce organic products in 2024 totaled over 84,000 ha, up 3,000 ha compared to 2023. This represents almost 5 percent of total agricultural acreage in the Netherlands. Of the organic agricultural area (84,000 ha), 73 percent is grassland, 19 percent arable land, 4 percent horticultural land, and 4 percent to produce green fodder crops. In 2024, there were 1,932 organic farmers, up from 1,298 in 2015, a decade ago.

The Netherlands seeks to increase organic area from 5 percent of total farmland to 15 percent by 2030. The government aims to achieve this through the Action Plan for Growth in Organic Production and Consumption.

Poland
In Poland, the amount of agricultural land under organic farming and the number of organic agricultural producers are growing. In 2024, there were 24,793 organic producers in Poland, a 3.3 percent increase compared to 2023, while the area under organic farming reached 691,471 ha, an 8.7 percent increase. The structure of Polish organic farming is dominated by crop production, with grains and feed crops accounting for the largest share of the crop area. Organic poultry and beef cattle production is growing. The organic processing sector is dominated by companies processing fruit and vegetables. The share of organic agricultural land in the total area of agricultural land in Poland at the end of 2024 was approximately 5.5 percent. According to the government's plan for the development of organic production in Poland, the share of organically managed agricultural land is expected to increase to 7 percent of total agricultural land by 2030.

The organic food market in Poland in 2025 amounted to approximately $477 million, 2.6 percent more than last year. It's difficult to assess how much of the sales growth is due to increased volume and how much to high inflation in Poland, particularly in the retail food market. There is no data available to show inflation in the organic products market. Despite many years of growth, organic food in Poland still accounts for only about 0.5 percent of the total food sales market. High inflation and rising living costs in relation to income limit the sales growth of this market segment.

Portugal
More than 860,000 agricultural ha are already certified in Portugal, which means that 22 percent of useful agricultural area in Portugal is organic.

Portugal has an Action Plan for the Production and Promotion of Organic Agricultural Products and Foodstuffs, approved by Resolution of the Council of Ministers No. 110/2017, which aims to double the area of organic agriculture, triple the area dedicated to horticultural crops, legumes, and other plant-based crops, and double organic livestock and aquaculture production for the 2022-2027 period.

Despite surveys which suggest demand for organic products, higher prices limit organic consumption in a highly price-sensitive country. Inflation and increasing cost of living have further accentuated this situation.

Romania
Romanian organic area continued its upward path in 2024 reaching 781,000 ha of both certified and under conversion land, an increase of 13 percent over 2023, according to the Ministry of Agriculture. The share of the total area under organic farming in Romania rose from 4.4 percent in 2021 to 6.2 percent in 2024 and is forecast to keep growing moderately. Nearly 40 percent of the organic area is represented by hayfields and pastures, followed by grains and horticultural crops, each with roughly 22 percent. On the animal side, with the exception

of sheep, which slightly declined, all organic livestock sectors expanded in 2024. The most spectacular year-on-year growth (35 percent) was for laying hens reflecting a strong demand for organic eggs.

At the same time, the number of organic operators grew by 9 percent from 13,260 in 2022 to over 15,000 in 2024. However, the organic sales pace of growth may be impacted by the increases in the value added tax for organic products and a high inflation rate, which deteriorates consumer purchasing power in general.

Slovenia
Slovenia's organic agriculture sector has grown over the last decades, with 11 percent of farmland under organic management as of 2024. Slovenia has an ambitious goals to reach 17 percent by 2027. The government is supporting this growth through an Action Plan for the Development of Organic Farming. The most important sector in Slovenian organic agriculture is grassland (83 percent) for animal feed.

Spain
Spain remains the leading producer in the European Union (EU) in terms of organic production area and ranks sixth globally, according to the organic production statistics report for 2024, published by the Ministry of Agriculture, Fisheries, and Food (MAPA). According to MAPA, as of the end of 2024, usable agricultural area dedicated to organic production reached 2,944,941 ha. Although this represents 46,940 ha less than the previous year, its share of the total cultivated usable agricultural area in Spain has increased by 2.3 percent, now standing at 12.3 percent, due to an overall decline in cultivated land. Seventy-five percent of organic area is concentrated in Andalusia (which accounts for half of the national total), Castilla-La Mancha, and Catalonia.

Nuts remain the main organic crop, accounting for 30 percent of the total organic area, followed by olive groves, cereals, and vineyards. According to Ecovalia, the Spanish Professional Association for Organic Production, Spain boasts the largest organic vineyard in the world.

The organic business sector is comprised of more than 68,400 registered activities, dominated by primary producers (84 percent), while the industrial sector accounts for 9 percent. A particularly noteworthy figure is the spectacular growth in export activities, which increased by 105 percent in 2023.

Among surveyed consumers, 43 percent highlight that organic foods are more natural, pesticide-free, and healthy. Twenty percent choose organic products for their flavor, quality and origin. Regarding frequency, 43 percent of Spanish buyers consume organic products every week.

Despite being a leader in production, organic consumption is relatively low in Spain, ranking eighth in the EU. In 2024, total spending on organic products exceeded $3.75 billion, with average annual spending per person estimated to reach $69, continuing a slow but upward trend. This spending represents around 3 percent of the total shopping basket, with notable differences between regions.

Price concerns remain a barrier limiting consumption growth. The composition of the Spanish organic shopping basket is balanced, with 44 percent plant-based and 50 percent animal-based products by value. In terms of volume, fruits and vegetables dominate, while meat leads in value. As for the main purchasing channels, large retail chains and supermarkets lead, followed by traditional stores.

Sweden
Organic food sales amounted to $3.4 billion in 2024, compared to $3.5 billion the previous year (a decline of 1.5 percent). Organic food’s share of the total food retail market decreased in all sales channels during 2024. Last year, 6.7 percent of total food sales in Sweden were organic. Although the price difference between organic and conventional products overall decreased, higher inflation tends to cause consumers to opt out of more expensive alternatives such as organic food.

Swedish organic products carry the Krav-label. This label has a uniquely high awareness among Swedes and basically every Swede knows the Krav brand to some extent.

The acreage for organic production decreased in 2024 to 510,000 ha, down by 40,000 ha compared to the year before, and now covers 17 percent of total agricultural farmland in Sweden. Of all agricultural land in Sweden, just over a sixth is farmed organically. After many years of increased organic farming, the trend has turned downward. Low prices for organic farmers have led some to choose to switch and more have been forced to return to conventional production.

Attachments:

No Attachments.