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中德农业中心
Deutsch-Chinesisches
AGRARZENTRUM

Sino-German Agricultural Centre (DCZ)

China's Organic Food Market and Organic Certification

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Leibniz-Institut für Agrarentwicklung
in Transformationsökonomien

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About the Sino-German Agricultural Centre (DCZ)

- The DCZ is **a joint initiative** of the German Federal Ministry of Agriculture, Food and Regional Identity (BMLEH) and the Ministry of Agriculture and Rural Affairs (MARA) of the People's Republic of China.
- DCZ's **core mission** is to establish a mutually fruitful dialogue on common agricultural challenges and to strengthen cooperation between Germany and China.

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- **The DCZ offers…**
  - **Policy advice:** agricultural policy recommendations for a sustainable, environmentally and climate-friendly agriculture and food industry.
  - **Expert dialogue:** a platform for in-depth dialogue between expert organisations from agricultural policy, science and business.
  - **Science exchange:** opportunities for closer scientific exchange between applied research institutions in both countries.
- Established in 2015, the project is currently in its third phase and is being implemented by a consortium comprising IAK Agrar Consulting GmbH and the Leibniz Institute of Agricultural Development in Transition Economies (IAMO).

IAK AGRAR CONSULTING
IAMO Leibniz-Institut für Agrarentwicklung in Transformationsökonomien

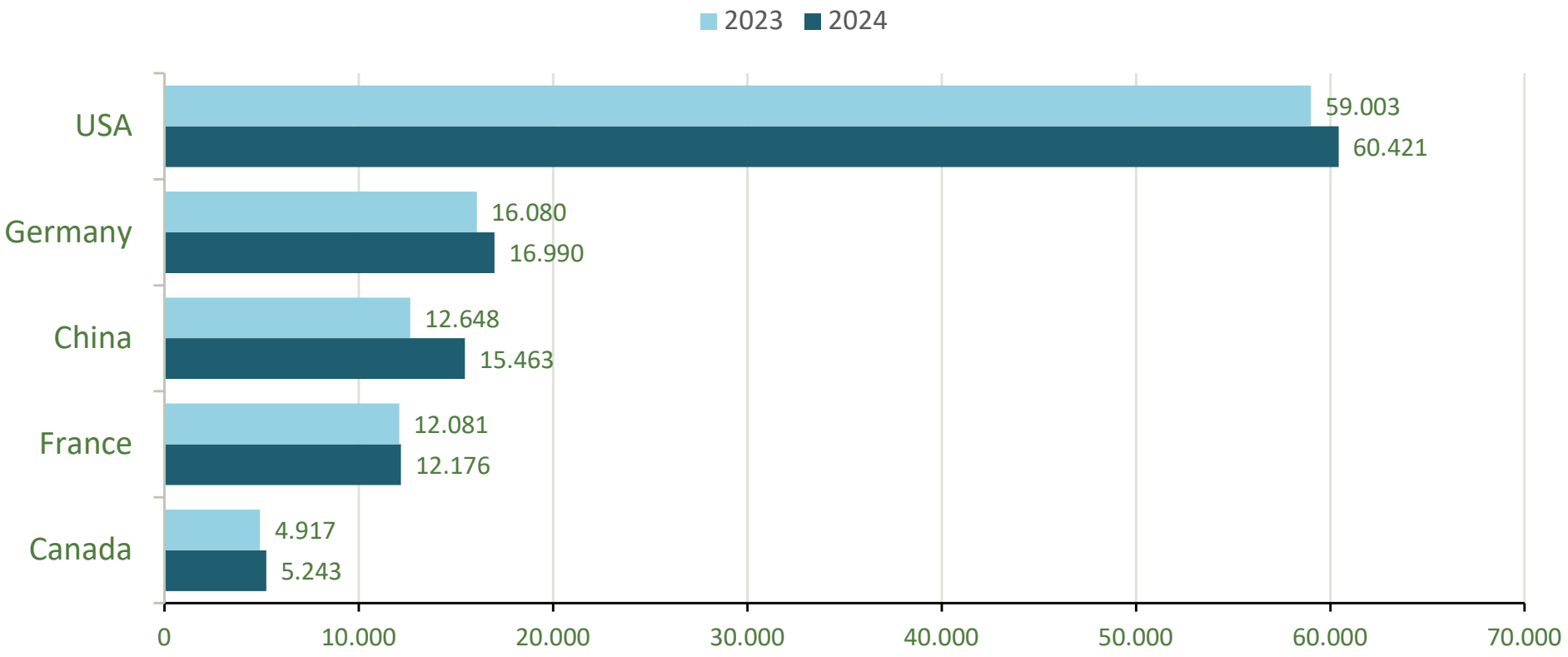
China – third largest market globally

€15.5 Bn
China organic market 2024
#3 worldwide

20.4% (2023)
23% (2024)
Annual market growth rate

Market trajectory
→ #2

Organic retail sales in € Mio.



Source: FiBL-AMI surveys 2025 and 2026, in FiBL & IFOAM – Organics International, The World of Organic Agriculture (editions 2025, 2026).

Potential of China‘s organic food market

Annual spend per person



Organic share of food sales

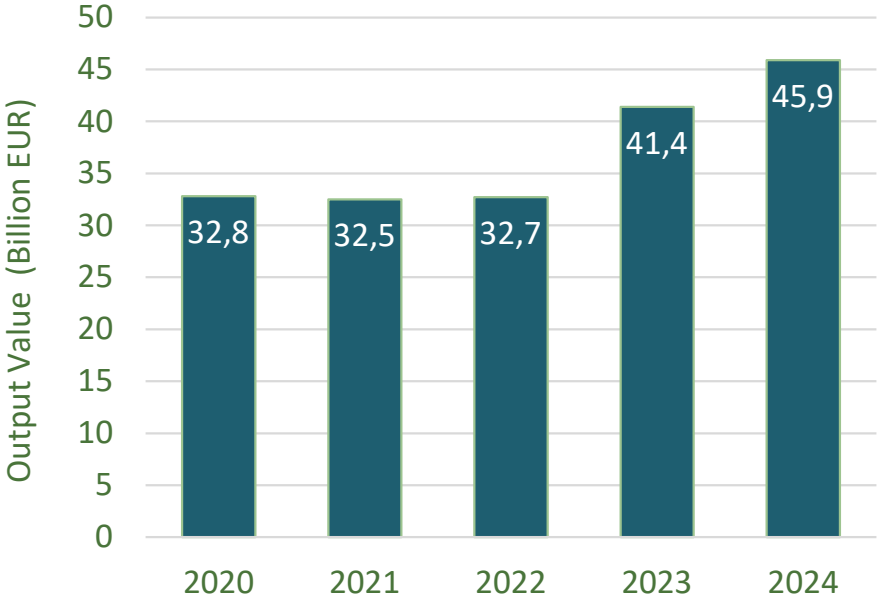


China spends about half the global average on organic food and holds under 2% market share: a large, still **untapped market with room to grow**.

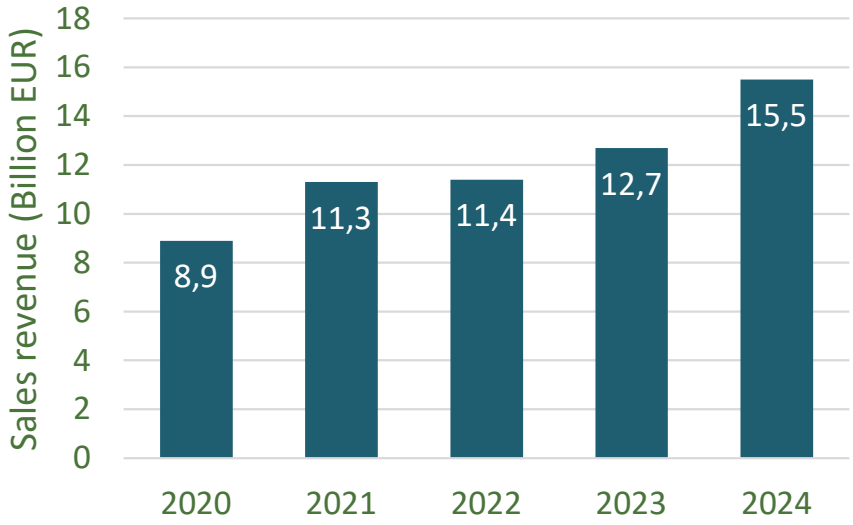
Source: China Organic Product Certification and Organic Industry Development (2025), p.230.

Output versus sales values

Changes in the output value of organic products produced and processed within China from 2020 to 2024



Organic retail sales in China



Source: CNCA/China Agriculture University (2025): The development of organic product certification and industry development in China (in CN).
Converted from RMB at ECB annual average EUR/CNY rates.

51,7% of output value of organic products is accounted for by processed organic products

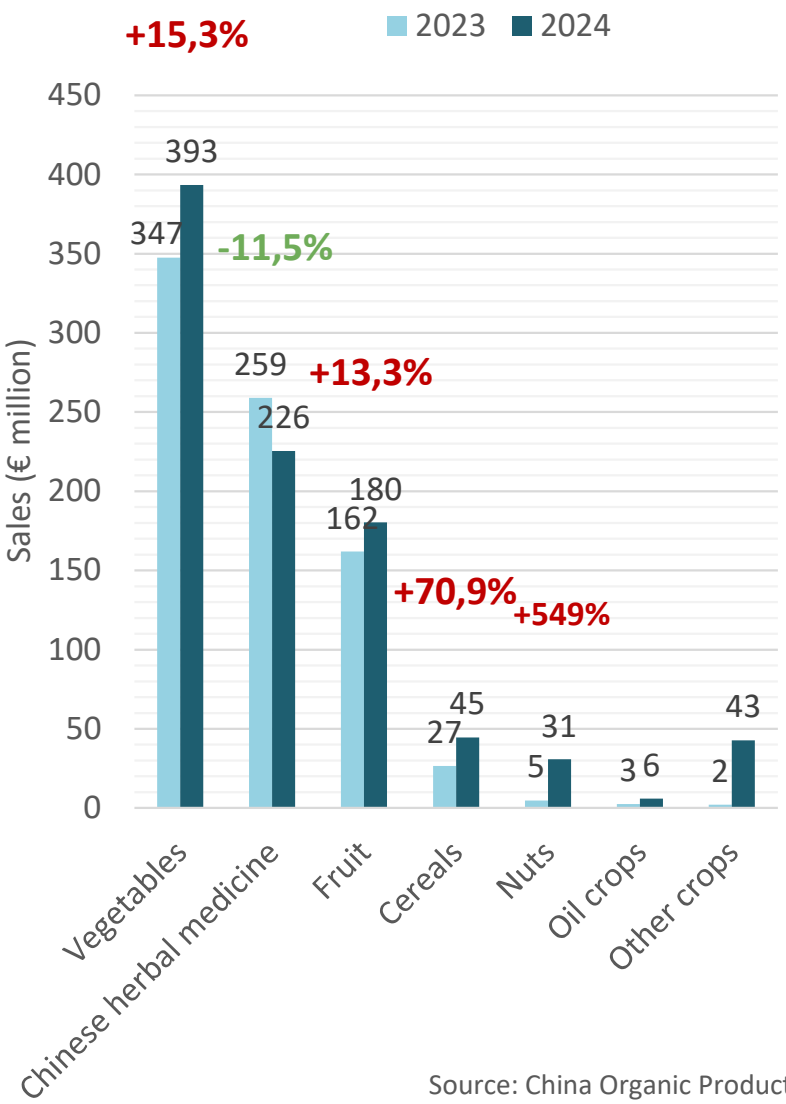
But: low ratio of sales to output value (≈34%)
93,5% of organic retail sales is accounted for by processed organic products.

→ Growing economic importance of **down-stream processing** in the organic sector

Heavily concentrated domestic market…

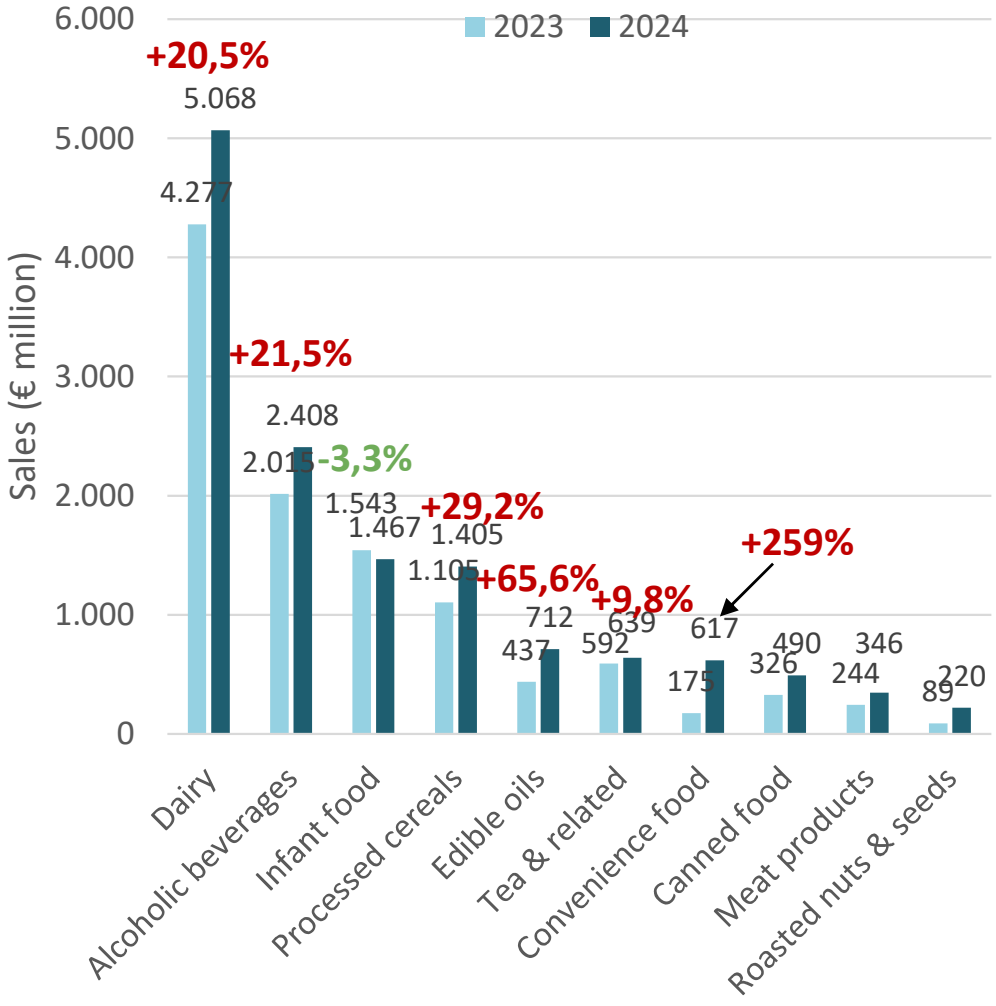
Organic primary products

2024 sales: €923 million
5.97% of China's organic market



Organic processed products

2024 sales: €14.46 billion
93.5% of China's organic market

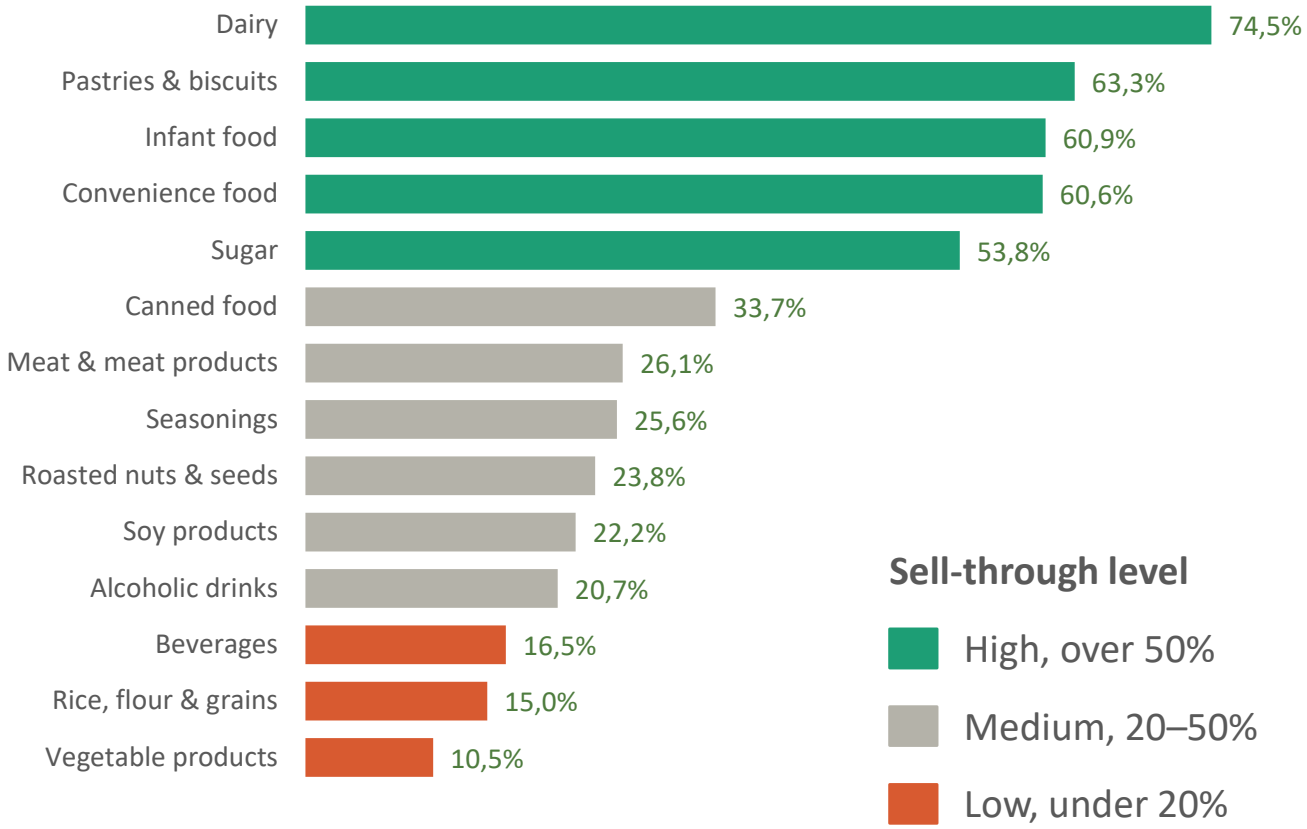


Source: China Organic Product Certification and Organic Industry Development (2025).

Organic processed products · Volume measure

Sell-through in tonnes, by product category

Tonnes sold with an organic label (2024) as % of certified tonnes produced (2023).
Processed products only.



Overall sell-through

38%

1,626 kt sold of 4,250 kt

Without dairy:

19%

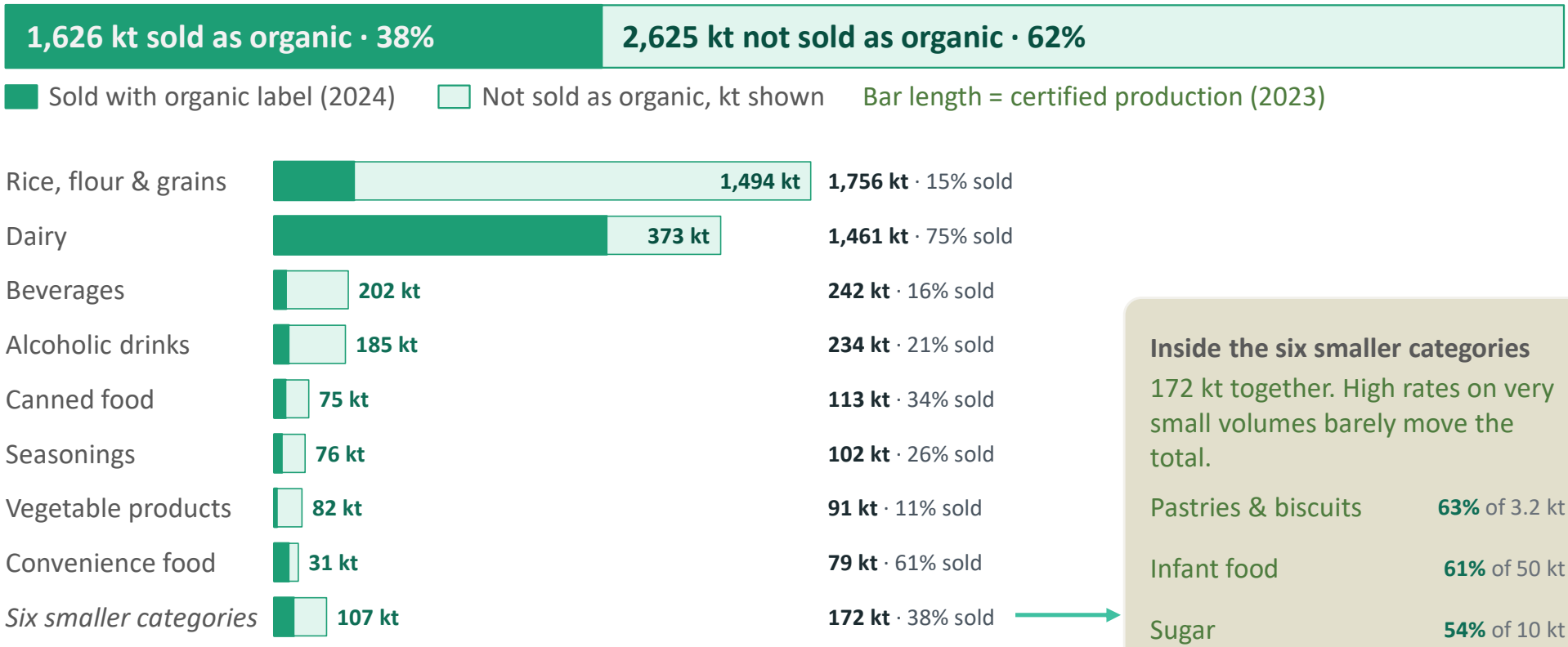
537 kt sold of 2,789 kt

Source: China Organic Product Certification and Organic Industry Development (2025), table 10-6.

Organic processed products · Volume measure

Where the unsold certified tonnes sit

Certified tonnes produced (2023) split into tonnes sold with an organic label (2024) and tonnes not sold as organic.



Source: China Organic Product Certification and Organic Industry Development (2025), table 10-6.

Inside the six smaller categories

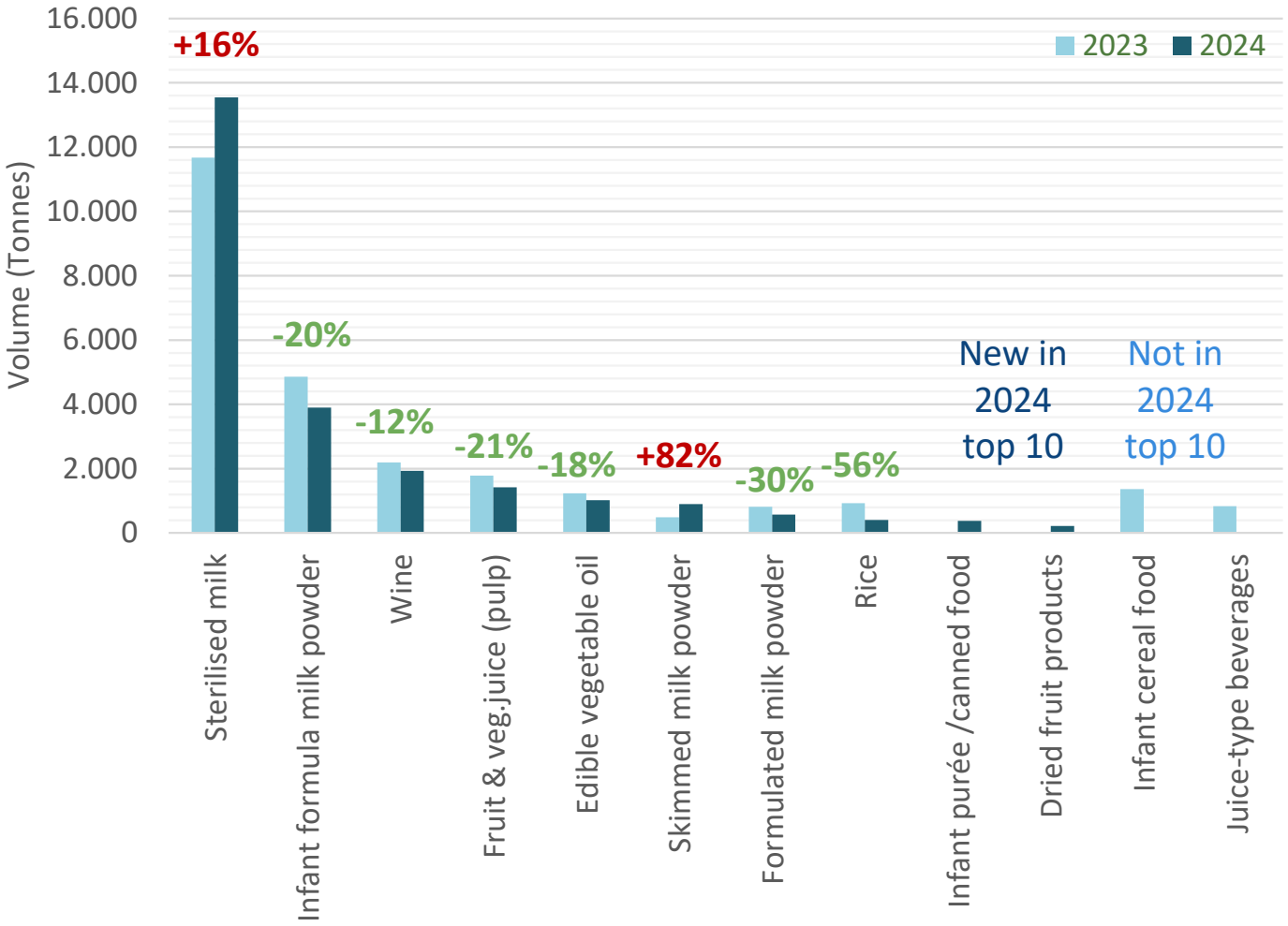
172 kt together. High rates on very small volumes barely move the total.

Pastries & biscuits	**63%** of 3.2 kt
Infant food	**61%** of 50 kt
Sugar	**54%** of 10 kt
Meat products	**26%** of 52 kt
Nuts & seeds	**24%** of 40 kt
Soy products	**22%** of 17 kt

Key message: in most categories the bottleneck is market conversion and demand, not supply.

Top 10 imported organic products by labelled volume

Quantity of imported products carrying the Chinese organic label (核销量) (tonnes)



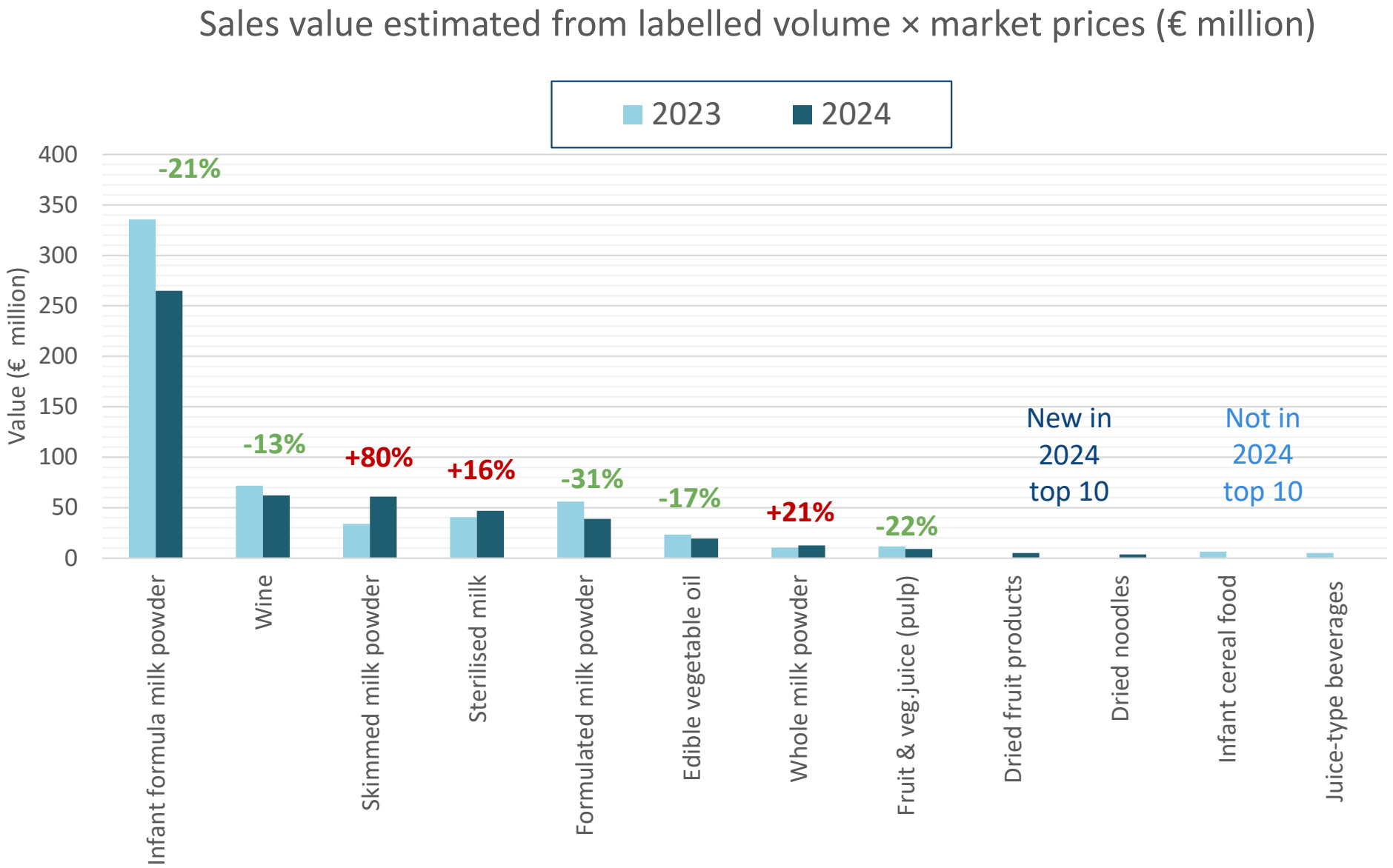
Total 2024: 25,000 t

–9.8% vs. 2023

Covers imported finished products certified to the Chinese organic standard (GB/T 19630) and carrying the Chinese organic label. Excludes organic raw materials imported under transaction certificates.

Source: China Organic Product Certification and Organic Industry Development (2025), Table 6-7.

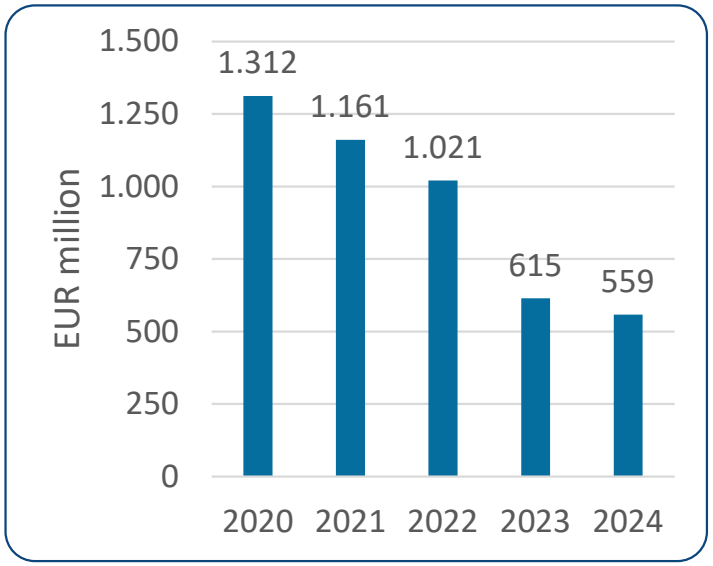
Top 10 imported organic products by estimated sales value



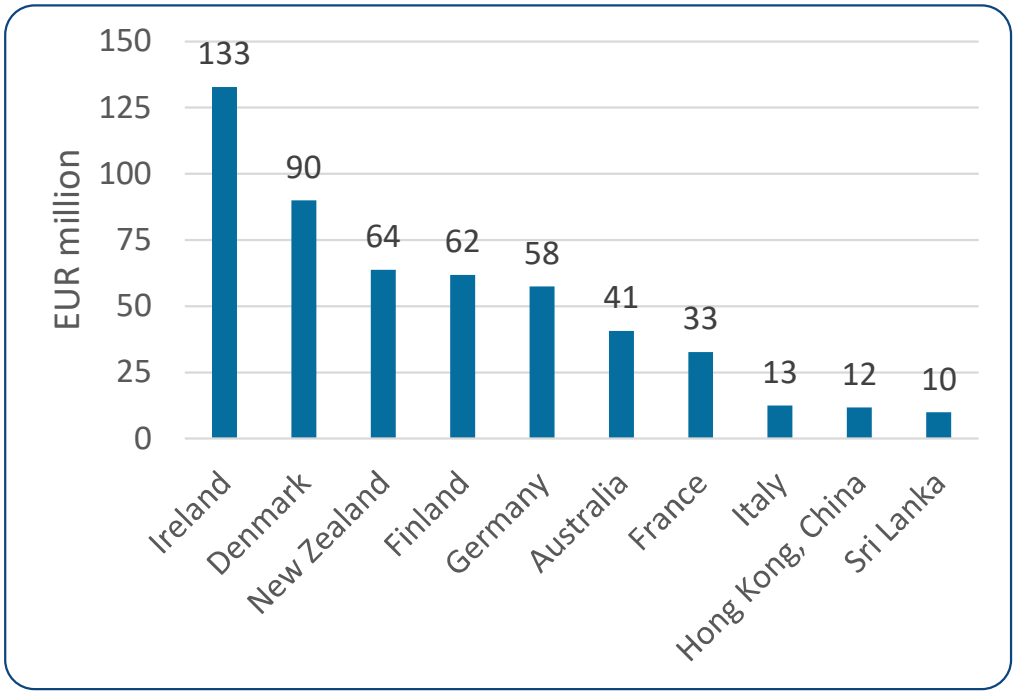
Source: China Organic Product Certification and Organic Industry Development (2025), Table 6-7 (imports certified to the Chinese organic standard). Converted at ECB annual averages.

Organic imports: small, shrinking and mostly European

Imported organic sales, in €
2020 –2024



Top 10 Origins of Organic Imports by Value
2024



Total 2024:
€ 559 m (CNY 4.35 bn)
-9.2% vs. 2023
-57% from 2020 to 2024

… but: **92%**
of total imports (by value) from these 10 origins with European countries being main countries of origin

Source: China Organic Product Certification and Organic Industry Development (2025), Table 6-7 (imports certified to the Chinese organic standard).
Converted at ECB annual averages.

Chinese organic market - opportunities

What makes organic sell in China

What consumers say + what the market shows

1

Safety and health come first

62%

buy organic because it is safer, with higher standards (59%: healthier)

Market: dairy 75% · infant and convenience food 61% sold

2

Trust: foreign labels are an asset

1 in 4

are satisfied with domestic food safety; foreign labels fill the gap

Market: dairy and infant food sell 4–5× better than staples

3

A premium that fits the product

46%

don't buy because organic is too expensive, the top barrier

Market: rice, flour & grains, at 2–3× the price: 15% sold

4

Visible where people shop

35%

don't buy because organic is hard to find in their usual store (24%: too little choice)

Market: 62% of certified tonnes not sold as organic

Takeaways for European SMEs:

- Organic is a premium in China
- Lead with safety and verifiable quality
- Use EU origin as a trust asset
- Demand is concentrated, identifiable, and reachable.
- Invest in shelf presence.

Sources: Wang Weijie, 2024 Baseline Survey Report on Organic Consumption of Residents in First-tier Cities in China (n=500, multiple answers); China Organic Product Certification and Organic Industry Development (2025), table 10-6. Presentation of Mr.Marco Schlüter on DCZ Webinar "organic in China" (2026)

Entering China's organic market:

Market access conditions and China's organic certification procedures for EU SMEs

Two organic regulatory systems

Two organic regulatory systems… and no bridge between them

EU / GERMANY

Regulation (EU) 2018/848

- In Germany: Competing private control bodies under public oversight
- EU logo + control body code (DE-ÖKO-xxx)
- Certificates published in TRACES.NT

≠

no mutual recognition

CHINA

National standard GB/T 19630-2019

- State-approved certification bodies (CNCA)
- Chinese logo + unique organic code on every unit
- Products registered on the CNCA platform

⚠ **Consequence: double certification.**
Two certificates, two inspections, two sets of costs.

Source: Merkle (2026), DCZ study "Comparative mapping of institutions involved in organic inspection and certification in Germany and China"

Status of mutual recognition

One mutual recognition arrangement in force

Partner	Status of organic cooperation
New Zealand	Mutual recognition in force — upgraded 2024
Denmark	Memorandum of Understanding (2024)
Finland	Cooperation agreement on certification (2024)
Australia	Letter of Intent (Oct 2024), no equivalence yet
Chile	Letter of Intent
European Union	None — with the EU or any member state

> *"In the global organic industry, China is like an island."*
>
> Zhang Youting, co-founder of Organic and Beyond, BIOFACH China 2026 roundtable

Sources: SAMR & CAU (2025), Organic Product Certification and Industry Development in China; Prof. Qiao Yuhui (CAU), BIOFACH 2026; BIOFACH China 2026 roundtable

The Chinese system · 1

Who does what: one centre of authority

Function	China	EU / Germany
Standard setting	State Administration for Market Regulation (SAMR) — GB/T 19630-2019	EU Commission: Regulation (EU) 2018/848 ……**and** National implementing legislations
Approval of certifiers	Certification and Accreditation Administration of China (CNCA) — approves and sets all rules	In Germany: Federal Office for Agriculture and Food (BLE)
Accreditation	China National Accreditation Service (CNAS) — GB/T 27065	In Germany: DAkkS — ISO/IEC 17065
Inspector qualification	China Certification and Accreditation Association (CCAA) — mandatory registration	Within accreditation
Certification	99 approved bodies (2024)	In Germany: 21 control bodies (DE)
Border control	General Administration of Customs China (GACC) — customs	Customs / TRACES.NT
Agricultural policy	MARA (CGFDC / COFCC)	In Germany: BMLEH

All functions sit at the **national level** under SAMR — no delegation to provinces.

The Chinese system · 2

What changed in 2026

2015
Food Safety Law
Statutory frame for food quality claims

→

2003 / 2016
Certification Regulations
Give CNCA authority over all product certification

→

New: 1 Jan 2026
CNCA Implementing Rules
Oblige certifiers to apply the standard

→

Certification standard
GB/T 19630-2019
The yardstick your farm and plant are audited against

A different legal logic

On its own, GB/T 19630 is only a "recommended" standard, the certification rules make it binding. The EU has one directly applicable regulation.

What changed in 2026

From one-off approval to **ongoing verification**: digital lifecycle data, strict separation of functions, every product on the CNCA national supervision platform.

The Chinese system · 3

Four features that surprise European producers

1 **A positive list of products**

Only products in the Certification Catalogue (47 major categories) can be certified — e.g. food supplements or cosmetics cannot.

2 **Inspection at harvest time**

All fields, facilities, activities, products and crop seasons — before or during harvest. Anything missed needs a complementary inspection.

3 **Mandatory testing**

Environment reports — soil (GB 15618), water (GB 5084), air (GB 3095) — plus product samples: prohibited substances must not be detected.

4 **The whole supply chain**

Every supplier, from raw material to final product, must be certified under GB/T 19630 — certifying the last processing step is not enough.

The Chinese system · 4

“One product, one code”: traceable to every pack

- **Certificate**
  Fixes the certified quantity — labels are limited by this value
- **B2B trade**
  A sales certificate (销售证) for every transaction between companies
- **B2C: smallest sales unit**
  Chinese organic logo + 17-digit organic code (certifier · year · serial)
- **Verification**
  Anyone can check the code at food.cnca.cn or via WeChat



Image: Prof. Qiao Yuhui (CAU). Data: SAMR & CAU (2025)

5.62 billion organic labels issued in 2024 for Chinese organic products,

79 million for imported products

Requirements for EU producers · 1



The route to China: five phases, no shortcuts

1 · Preparation

- Check the Catalogue
- Find a Chinese buyer
- Choose a CNCA-approved certifier

2 · Documentation

- Management system to GB/T 19630
- Every supplier covered
- Soil, water, air reports

3 · Inspection

- Before or during harvest
- On-site audit in Europe
- Product sampling

4 · Certification

- Separate reviewer decides
- Product registered on CNCA platform
- Codes issued per batch

5 · Selling

- Chinese logo + code on each pack
- Importer registered with GACC
- Renew every harvest or cycle

⚠ **Key risk:** if one link — even one raw-material supplier — lacks GB/T 19630 certification, the product cannot be sold as organic in China.
Full supply chain coverage must be planned from the outset.

Requirements for EU producers · 2

Choosing a certifier: the legal entity matters

Certifier active in Europe	How it works for EU producers
Ecocert China	Chinese entity; auditors from Ecocert's European offices; EU + Chinese audit possible in one visit
CCIC Europe / CQC	Local auditors in Europe; certification decision taken by CQC in China
Kiwa BCS China	Chinese entity; German parent as contact point; combined audit to be confirmed
Control Union	Through a CNCA-registered Chinese partner

Note: This is not an exhaustive list; confirm services directly with each certifier

Same brand, different entity: Ecocert SAS (France) issues the EU certificate — only Ecocert China can issue the Chinese one. Check approvals at cx.cnca.cn.

Requirements for EU producers · 3

What it costs and why the buyer comes first

$20–25k

Recertification to the Chinese standard, per producer

Marco Schlüter, Naturland

€13,500

Single-category product such as olive oil or beef

Zhang Youting, Organic and Beyond

€135,000

Imported chocolate with vanilla, cane sugar and cocoa from three continents — **project abandoned**

Zhang Youting, Organic and Beyond

Add travel, testing and renewal every cycle. **Secure a concrete Chinese buyer before you invest.**

Source: BIOFACH China 2026 roundtable “Germany–China Organic Trade”, Shanghai, 18 May 2026 (indicative figures quoted by participants)

Key takeaways for European SMEs

1. **Budget for two certificates.** No mutual recognition with the EU — none in prospect.
2. **Buyer first, then Catalogue, then certifier.** No buyer, no business case.
3. **Map the whole supply chain early.** Short chains and simple products win.
4. **Time the audit to your harvest** and plan for renewal every cycle.
5. **Find your "translators":** certifier, importer, etc.

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