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# China's organic agriculture and food sector

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DCZ Expert Study

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## Foreword

This edition of *China's Organic Agriculture and Food Sector* provides an in-depth analysis of trends and changes in China's organic agriculture sector during the reporting period of 2024. It draws primarily from the *World of Organic Agriculture 2026* report, published annually by the Research Institute of Organic Agriculture (FiBL) and the International Federation of Organic Agriculture Movements (IFOAM), as well as additional statistics from relevant Chinese authorities.

China has emerged as a significant producer and growing market for organic food, supported at the highest political levels as a means to improve the environment and create rural income opportunities. Key developments in 2024 include continued growth in certified organic land and an expanding domestic retail market.

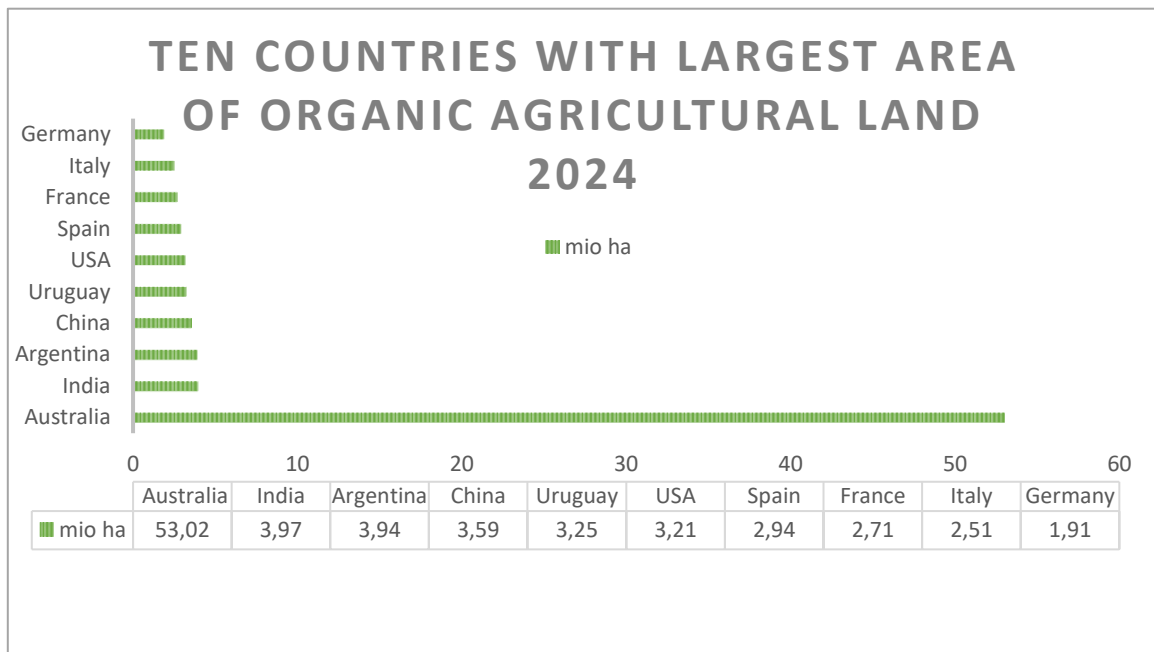
However, the sector continues to face structural challenges: high conversion costs and contamination risks make organic farming economically precarious for many smallholders, while China must comply with the EU regulation for organic agriculture (EU Regulation 2018/848) which in practice imposes dual certification requirements.

## Data and facts

Over the past decades, China's organic agriculture and food sector has caught up with leading global producers and markets. In 2000, only 4,000 hectares of China's arable land were certified as organic. By 2024, this figure had increased to 3.59 million hectares, accounting for 0.74% of the country's total agricultural land (Willer et al. 2026, p. 278, CNCA/China Agriculture University 2025, p. 1).

Currently, China has the fourth-largest area of certified organic agricultural land or land under conversion, following Australia, India, and Argentina (Willer et al. 2026, p. 37).

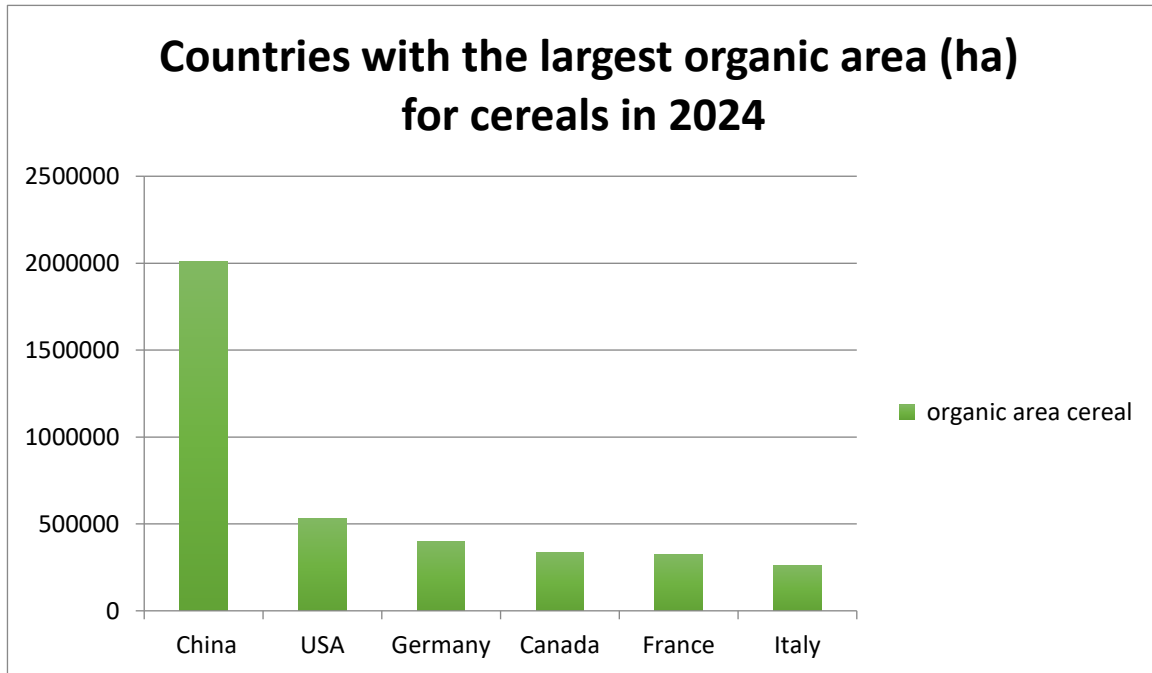
Approximately 56.0% of China's organic farmland is used for cereal production, 17% for beans, 11.5% for nuts, 4.6% for grass and hay, 3.7% for medicinal herbs, and only 2.3% for vegetables<sup>1</sup>. Additionally, the area designated for wild collection covers 3.31 million hectares (CNCA/China Agriculture University 2025, p. 5).



Source: Willer et al. 2026, p. 37

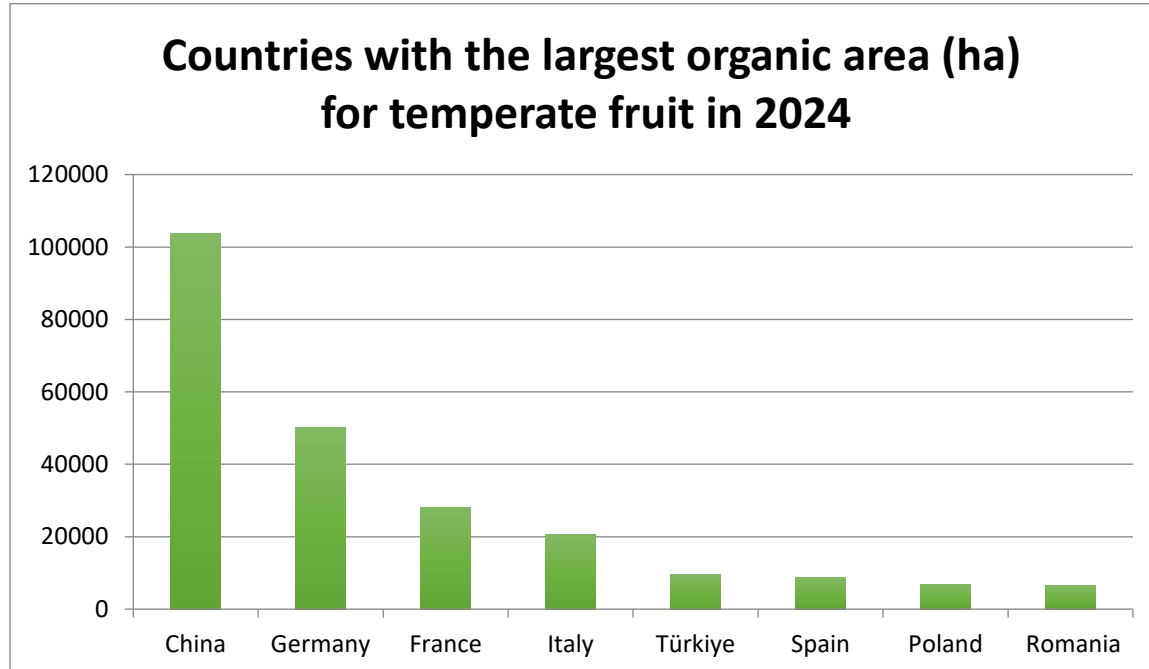
<sup>1</sup> At the same time, vegetable products recorded the second highest increase in organic label registrations between 2023 and 2024 (plus 70.1%), directly after ready meal (or convenient food) and ahead of pasteurized milk (plus 45.3%). See Qiao (2026).

With approximately 2.01 million hectares of organic cereal area, China ranks as the world's leading country in this category (Willer et al. 2026, p. 69).



Source: Willer et al. 2026, p. 69

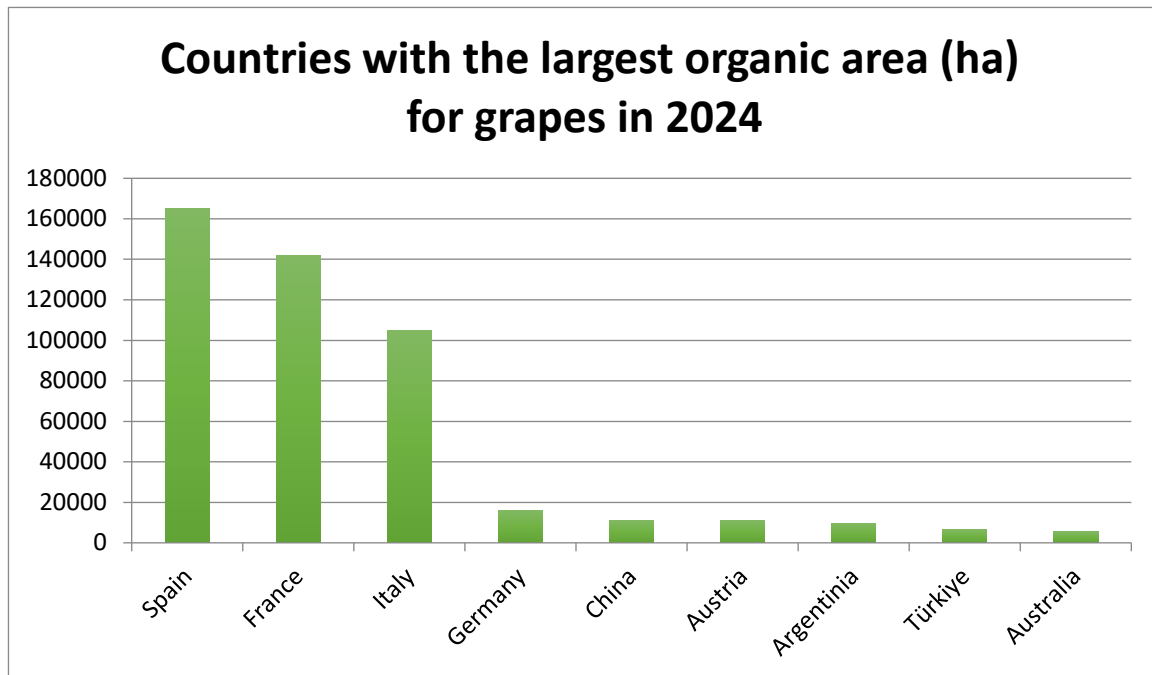
China is also the country with the largest area of organic temperate fruits worldwide, In 2024, approximately 103,700 hectares of temperate fruit areas were managed organically (Willer et al.



2026, p. 79).

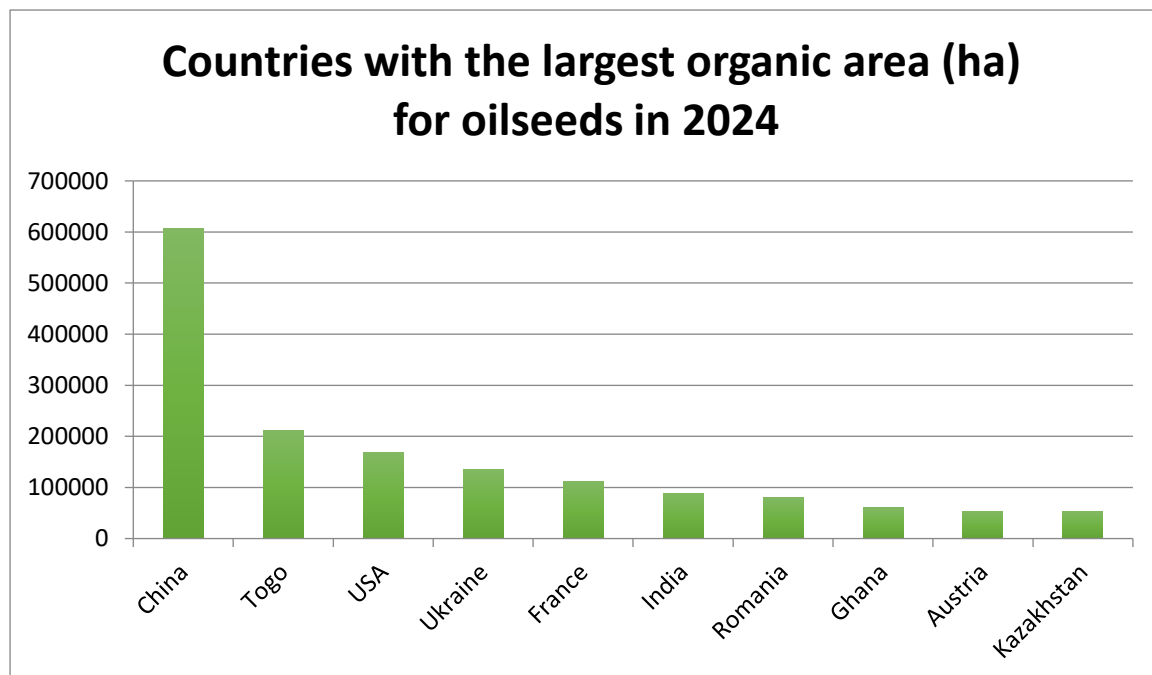
Source: Willer et al. 2026, p. 79

With over 11,100 hectares of vineyards under organic management, China ranks among the top five countries with the highest area of organic grapes (Willer et al.2026, p. 83).



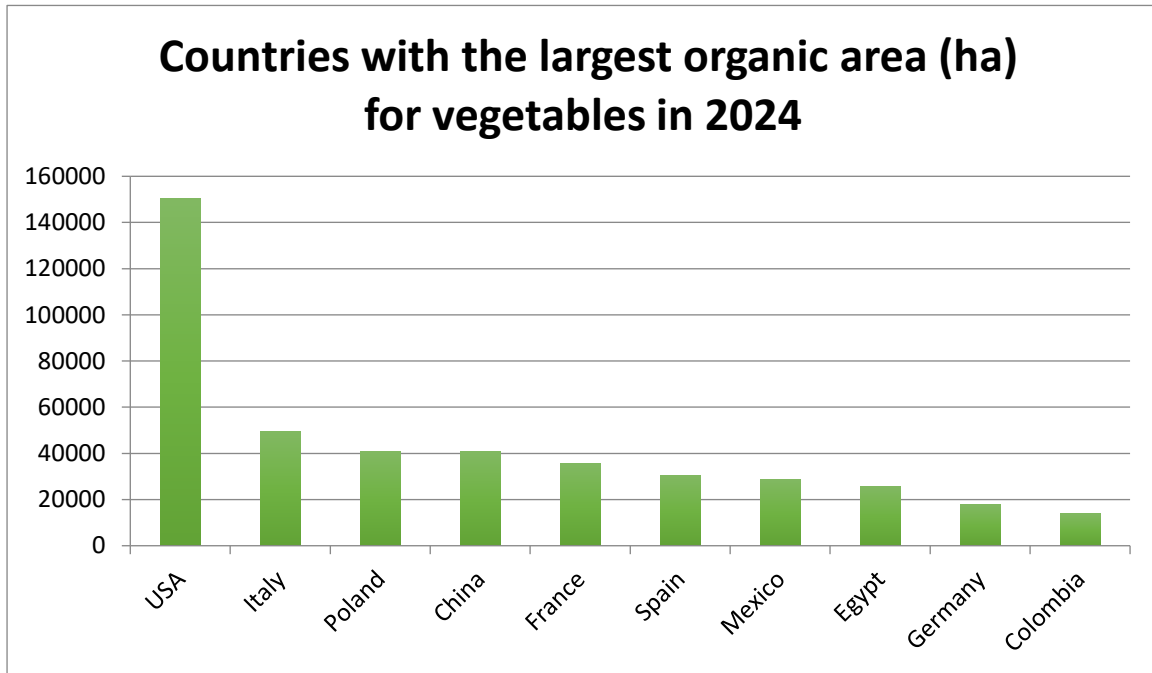
Source: Willer et al. 2026, p. 83

Moreover, with 606,900 hectares under organic cultivation, China is the world's leading country in terms of organic area of oilseeds. (Willer et al. 2026, p. 85).



Source: Willer et al. 2026, p. 85

And with 40,700 hectares of organic vegetable cultivation, China has the fourth-largest area dedicated to organic vegetable production (Willer et al. 2026, p. 89).

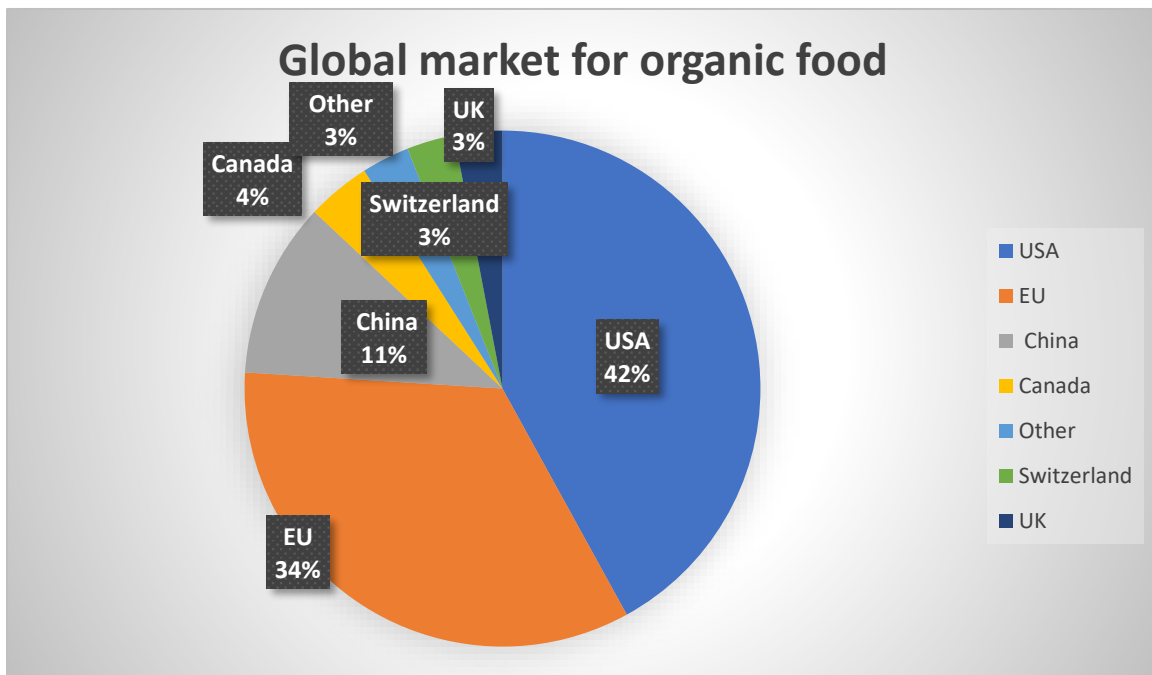
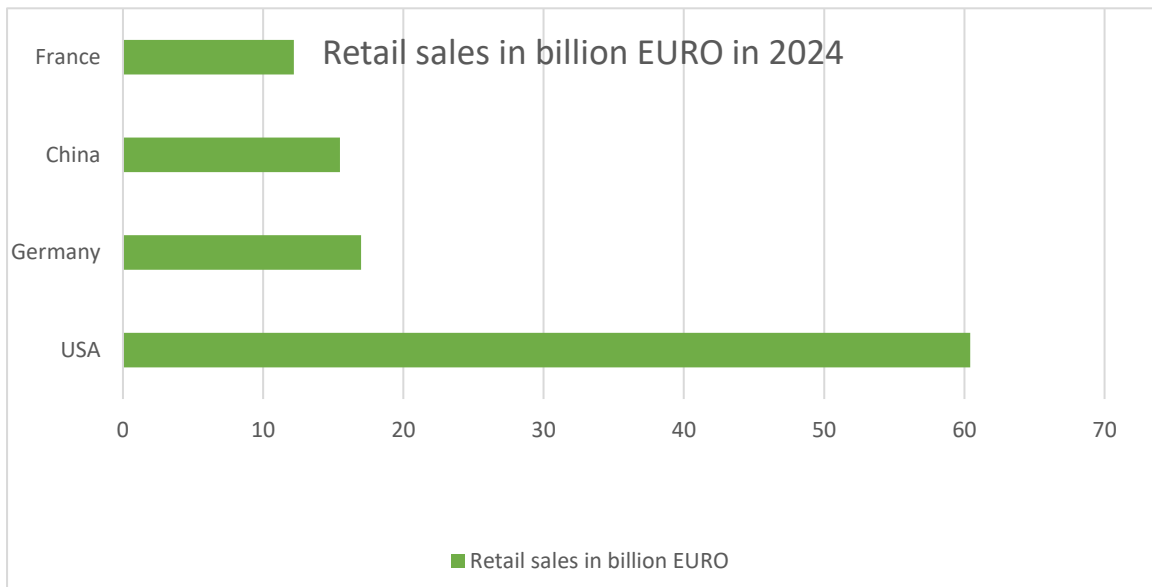


Source: Willer et al. 2026, p. 89

With 3.31 million hectares designated for organic wild collection and beekeeping, China also ranked second worldwide in 2024 (Willer et al. 2026, p. 63).

So far, certified organic land accounts for only 0.7% of China's total arable land, compared to 11.5% in Germany (Willer et al. 2026, p. 278). The share of certified organic crop production in China's total agricultural production area varies by sector: 1.8% for cereals, 5.2% for fruits and nuts, 2.5% for legumes and other oil crops, and just 0.3% for vegetables (CNCA/China Agriculture University 2025, p. 25). These figures indicate that organic farming remains a niche sector in China but has significant growth potential.

However, with an annual turnover of EUR 15.46 billion in 2024, China is already the world's third-largest market for organic food, following Germany (EUR 16.99 billion) and the United States (EUR 60.42 billion). The country accounts for 11% of the global organic food market (Willer et al. 2026, p. 53).



Source: Willer et al. 2026, p. 52, 53

## The road towards China's first organic label

China has a long indigenous tradition of organic agriculture, characterized by a wealth of knowledge and practices related to organic fertilizer preparation, soil cultivation, and biological pest control. These practices were notably described by American soil scientist F.H. King in his 1911 work, "Farmers of Forty Centuries: Permanent Agriculture in China, Korea, and Japan". Unfortunately, many of these skills were lost or neglected during the "Green Revolution" that began in the 1970s. With the support of agrochemicals, mechanization, and genetic improvements, China achieved remarkable increases in agricultural productivity; however, this progress came at the cost of becoming the world's leading user of chemical fertilizers and pesticides.

In the 1990s, the State Environmental Protection Administration (SEPA), the predecessor of today's Ministry for Environmental Protection and Ecology (MEE), became the primary advocate for promoting organic farming in China. This shift aimed to address the significant environmental pollution, soil degradation, and public health issues resulting from the overuse of agrochemicals. In contrast, the Ministry of Agriculture (MoA), now known as the Ministry of Agriculture and Rural Affairs (MARA), was initially hesitant to recommend farming techniques that might lead to a potential decrease in yields, given its overarching goal of ensuring food security. However, as market opportunities for organic food became more apparent and the ecological crisis worsened, the ministry's stance evolved, recognizing the urgent need to reduce agrochemical inputs.

Modern organic agriculture, adhering to internationally accepted rules and standards, was first introduced in the 1990s by Western companies and was initially focused on exports. In 1990, the Dutch certifier SKAL certified organic green tea from Lin'an County in Zhejiang Province, marking the first instance of organic certification in China. In 1994, SEPA established the Organic Food Development Centre (OFDC), affiliated with the Nanjing Institute of Environmental Science. Between 1997 and 2003, the German development agency GTZ (now GIZ) collaborated with OFDC on the project "Development of Organic Agriculture in Poverty-Stricken Areas in China," which helped establish an organic tea plantation in a remote county in Anhui Province. In 2002, with GTZ's support, OFDC became the first Chinese organic certifier accredited by the International Federation of Organic Agricultural Movements (IFOAM) and the International Organization for Standardization (ISO). Following this accreditation, OFDC proudly integrated the IFOAM logo into its logo (<http://www.ofdc.org.cn/>).



In the following years, more Chinese organic certifying companies were established, including the Organic Tea Research and Development Center (OTRDC), which is affiliated with the Tea Research Institute of the China Academy of Agricultural Sciences (CAAS) in Hangzhou.

In the early years, organic labels were rarely found in the Chinese market, and consumers had little understanding of the concept of certified organic food. Moreover, these organic labels had to compete with the better-known "Green Food" (绿色食品) label, introduced in 1990 by the Ministry of Agriculture's Green Food Development Centre (Zhai et al. 2024). The Green Food label was China's first government-supported certification program aimed at ensuring food safety. While often mistaken for organic food, "Green Food" Grade A permits the use of agrochemicals to a certain extent.

In 1995, the Green Food Development Center established the "Green Food AA Standard" for premium products primarily designated for export and seldom found in local markets. These products were required to meet stricter international standards for organic food. In 2002, the Green Food Development Center created its own organic certification body, the China Organic Food Certification Center (COFCC), introducing a new organic food label that effectively replaced the Green Food AA label.

Leveraging its extensive network of local Green Development Centers and their inspectors, COFCC quickly became the country's leading certifier. It also emerged as a major partner for Nürnberg Global Fair's BioFach, the world's leading organic trade fair, and organized the first BioFach China in 2007 in Shanghai.



## Development of a regulatory framework

Since 2003, several significant steps have been taken toward the institutionalization and regulation of organic food in China. In that year, the China National Certification Administration (CNCA), a government institution affiliated with the General Administration of Quality Supervision, Inspection, and Quarantine (AQSIQ), formally assumed responsibility for administering China's organic product certification.

In 2005, the *Regulations of the People's Republic of China on Certification and Accreditation* were released, stipulating that only companies registered with the CNCA and accredited by the China

National Accreditation Service for Standardization (CNAS) could conduct certification. Additionally, the *National Standard for Organic Products (GB/T 19630)* and the *Implementation Rules for Organic Product Certification* were introduced. The *National Standard for Organic Products (GB/T 19630)* and the *Implementation Rules for Organic Product Certification* were revised and streamlined in 2011 and again in 2019 to meet the requirements of a rapidly developing sector. The *Administrative Measures on Organic Product Certification*, first issued in 2004, were revised in 2022 (SAMR Decree No. 61), and a further revision of the *Implementation Rules for Organic Product Certification* entered into force in January 2026, tightening requirements for certification bodies and strengthening post-certification supervision (CNCA 2025, CNCA Secretariat 2025). The latest revision in the implementation rules underscores the efforts to build a continuous compliance system subject to routine verification, moving away from the previous approach of treating organic certification as a one-time labelling decision.

Tab. 1: Development of a regulatory framework for organic food certification in China

1990	Dutch SKAL certification body issued the first organic certification in cooperation with the Nanjing Institute for Environmental Sciences (NIES).
1992	Ministry of Agriculture (MoA) established Green Food Development Center. Green Food AA standard becomes equivalent to organic.
1994	State Environmental Protection Administration (SEPA) establishes Organic Food Development Center (OFDC) affiliated with NIES.
1995	<i>Approach to Management of Organic Certification</i> and <i>Technical Norms for Organic Food</i> promulgated by SEPA.
2001	Revised standards (with reference to IFOAM standards) published by OFDC.
2002	MoA established the China Organic Food Certification Center (COFCC) under the Green Food Development Center. COFCC is the first certification body registered at China National Certification Administration (CNCA).
2003	CNCA takes over the administration of organic product certification.
2004	<i>Administrative Measures on Organic Product Certification</i> first issued.
2005	<i>Regulatory Measures on Organic Product Certification Management</i> (by AQSIQ), <i>National Standard for Organic Products Certification (GB/T 19630)</i> , as well as the national logo for organic products introduced. <i>Implementation Rules for Organic Product Certification</i> (by CNCA) issued.
2011	<i>National Standard for Organic Products</i> and <i>Implementation Rules for Organic Product Certification</i> revised (CNCA-N-0009:2019).
2013	<i>Administrative Measures on Organic Product Certification</i> revised (AQSIQ Decree No. 155)
2015	Plan for Sustainable Agriculture 2015-2030, Fertilizer and Pesticide Act issued; <i>Administrative Measures on Organic Product Certification</i> revised (AQSIQ Decree No. 166).
2019	<i>National Standard for Organic Products (GB/T 19630-2019)</i> and <i>Implementation Rules for Organic Product Certification</i> revised.
2022	<i>Administrative Measures on Organic Product Certification</i> revised (SAMR Decree No. 61).

2024	<i>Action Plan for Enhancing Credibility in the Quality Certification Industry (2024-2026)</i> issued (SAMR); <i>Action Plan for Using Quality Certification to Empower Enterprises, Supply Chains, and Counties (2024-2026)</i> released (CNCA).
2026	Revised <i>Implementation Rules for Organic Product Certification</i> enter into force.

Products that have obtained Chinese organic certification must display the uniform green, circular logo for labeling organic food products on the packaging, alongside the label of the certification company. Foreign organic products that have not obtained Chinese organic certification from a CNCA-accredited body (exceptions apply to products from New Zealand due to a mutual recognition agreement) must cover or remove organic-related labels when placed on the Chinese market (SAMR 2022, Article 34).



In addition, there is a brown logo for labeling organic food produced on agricultural land under conversion.

The current regulatory framework operates on a "one product, one code" traceability system, which requires labelling of each certified product batch with a unique QR code. By scanning the QR code, the consumer is directed to a national database (<https://food.cnca.cn/>), which reveals details from production location and date through to the certifying body (CNCA/China Agriculture University 2025, p. 3).

Only products containing 95% or more organic ingredients can be labeled as organic (SAMR 2022, Article 15,16).

## Policy acceleration in the 2020s

The 20th National Congress of the Chinese Communist Party in 2022 reflected the political emphasis on strengthening rural revitalization and turning China into an agricultural powerhouse, which has contributed to the establishment of organic production as a tool for value creation and green transformation in rural areas (CNCA/China Agriculture University 2025, p. 21). The course at the national level supporting the development of assistance industries in rural areas (帮扶产业) has shaped new opportunities for organic producers (Central Committee of the Communist Party of China and State Council, 2024, DCZ; CNCA/China Agriculture University 2025, p. 18), and influenced the political agenda of provinces, with several examples demonstrating

progress in actively devising plans and distinctive policy measures, and implementing practical initiatives related to organic agriculture.

In December 2024, the Ministry of Agriculture and Rural Affairs released the Guidelines on Accelerating the Comprehensive Green Transition of Agriculture and Promoting Rural Ecological Revitalization, linking agricultural modernization and rural revitalization with a green and low-carbon oriented approach. The guidelines explicitly called for strengthening the development of green, organic, specialty, and geographical indication (GI) agricultural products (MARA 2024).

As the number of certification bodies in China's organic sector expanded rapidly, concerns emerged over insufficient oversight and irregularities in the inspection and certification of organic producers and products. In response, Chinese regulators strengthened supervision in 2024. SAMR organized a "Dual Randomness, One Publicity" inspection, targeting certification bodies. 300 certification agencies were randomly selected, and 2,175 certification files were reviewed. A parallel "Two Randomness, One Publicity" inspection of 40 certification bodies found no legal or regulatory violations in organic product certification. In April 2024, SAMR also released results of a spot-check audit on the continuing validity of organic product certifications, examining 143 product batches from 33 certification bodies (a 28.7% coverage rate). Of these, 8 sampled batches failed to meet certification requirements (CNCA/China Agriculture University 2025, p. 20).

## International recognition

China is not listed as a recognized third country under Annex I of Regulation 2021/2325 (European Commission 2021). Organic products from China destined for the European market must therefore be certified by a control body recognized under Article 46 of EU Regulation 2018/848, accredited against ISO 17065 and authorized to certify compliance with EU organic production rules (European Parliament and Council of the European Union 2018). These include, amongst others the French certifier ECOCERT and the German certification bodies CERES and Kiwa BCS Öko-Garantie.



As Annex I of Regulation 2021/2325 expires on 31 December 2026, third countries currently recognized under the old equivalence framework will need to conclude a bilateral trade agreement with the EU under Article 47 of Regulation 2018/848 to maintain preferential access to the EU organic market without reverting to the control body certification route. China is expected to remain dependent on the control body certification route. The requirement for effectively double certification is costly and poses a barrier to the growth of China's organic export sector. Double certification is also mandatory for EU exporters to China, as the EU and China do not recognize each other's organic systems as equivalent (Merkle (2026).

China has sought to advance organic certification cooperation with individual countries inside and outside the EU. One bilateral arrangement is in force with New Zealand<sup>2</sup> and a Letter of Intent was signed with Australia in October 2024 but has not yet been converted into a formal mutual recognition arrangement. Furthermore, a Memorandum of Understanding with Denmark and two other Letters of Intent with Chile and Finland exist (Merkle, 2026). These steps represent incremental progress toward wider international recognition of Chinese organic certification.

## Present status of certified organic agriculture in China

Organic product certification in China has grown steadily over the past five years. According to the China National Certification and Accreditation Administration (CNCA), 99 certification bodies issued certificates for organic products placed on the Chinese market in 2024, up from 68 in 2019 and 96 in 2023 (CNCA/China Agriculture University 2025, p. 4). In 2021, 15 certification bodies in China conducted certifications in accordance with international standards. These included OFDC (China), CHTC (China), Ecocert (France), Kiwa BCS (Germany), CERES (Germany), SRS (Germany), Demeter (Germany), BAC (Italy), ACERT (Greece), NASA (Australia), JONA (Japan), IBD (Brazil), and Doalnara (South Korea). China's leading certifier is the Beijing Wuzhou Hengtong Certification Co. (CHTC), which also offers certifications abroad.

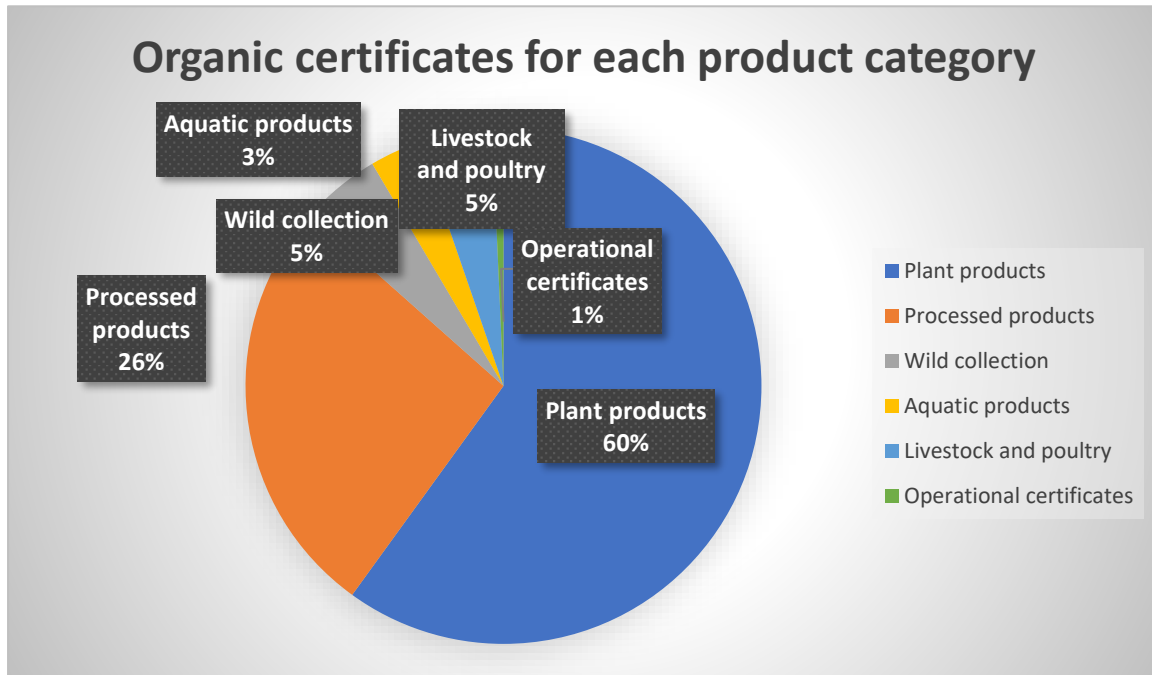
*Tab.: 2 List of top 20 Chinese certifiers in 2019*

<b>Certifiers</b>	<b>Numbers of certificates</b>	<b>Number of certified companies</b>
Beijing Wuzhou Hengtong Certification Co	3752	2595
Organic Food Development and Certification Center of China (OFDC)	2542	1127
Beijing Zhonglv Huaxia Organic Food Certification Center (OFCC)	1771	1033
Hangzhou Wantai Certification Co	1500	975
Beijing Zhongjinniu Certification Center Co. Ltd	985	709
China Green Certificate (Beijing) Certification Center	816	582
Ohti Certification Co	748	516
Beijing Zhongan Quality and Environmental Certification center	673	463
OTRDC	664	383
GRIT	643	493
CQM	569	323
China Europe Joint inspection and certification	543	423
Beijing Wuyue Huaxia management and Technology	502	322
China Quality Certification Center	472	333
Guangdong Zhongjian Certification Co	421	284
Beijing Zhongnong Lvan Organic Agricultural Technology	407	276
ECOCERT China	407	297
Liaoning Fangyuan Organic Food Certification Co	405	214

<sup>2</sup> New Zealand organic farmers/operators no longer need dual certification, but their products must still have a Chinese label in order to be sold on the Chinese market.

Heilongjiang Guoan Product Quality and Safety Certification Center	365	172
Liaoning Liaohuan Certification Center	299	221

In terms of product category, plant products accounted for the largest share of certificates at 59.98%, followed by processed products at 26.59%, wild collection at 4.95%, livestock and poultry at 4.59%, aquatic products at 3.20%, and operational certificates at 0.70% (CNCA/China Agriculture University 2025, p. 4). This structure reflects that the supply base for organic agriculture in China remains primarily oriented toward primary crop, oilseeds, fruit and vegetable production, with comparatively limited development in downstream processing and animal-based products.



Source: CNCA/China Agriculture University 2025, p. 4

## Crop production

In 2024, China's certified organic crop production area reached 3.59 million hectares, yielding 28.63 million metric tons of produce, while an additional 3.31 million hectares were designated for certified wild collection, with a total harvest of 2.36 million metric tons (CNCA/China Agriculture University 2025, p. 5). A total of 24,691 organic crop product certificates were issued. In terms of crop composition, cereals accounted for the largest certified area, followed by beans, oilseeds, and potatoes, and then nuts, oil-bearing fruits, spices, and beverage crops - the top three categories together representing 84.56% of total certified area (CNCA/China Agriculture University 2025, p. 5).

Geographic concentration remains a defining characteristic of Chinese organic agriculture. The five provinces with the largest certified organic crop area - Heilongjiang (114.65 thousand ha), Inner Mongolia (57.93 thousand ha), Yunnan (31.24 thousand ha), Guizhou (20.90 thousand ha), and Henan (19.98 thousand ha) - collectively accounted for 68.18% of China's total certified organic crop area (CNCA/China Agriculture University 2025, p. 5). This concentration reflects the structural advantages of China's northeastern and southwestern regions, where lower population density, greater distance from intensive conventional agriculture, and more favorable natural

conditions support organic production. By contrast, densely populated eastern provinces face persistent challenges in meeting organic standards due to proximity to conventional farming and associated contamination risks.

## Animal production

In 2024, a total of 1,606 certificates were issued for organic livestock and poultry, covering 1,103 certified enterprises, with total output reaching 3.23 million metric tons (CNCA/China Agriculture University 2025, p. 6). Among animal products, organic bovine milk was the highest-producing category at 2.96 million metric tons, reflecting strong consumer demand for certified organic dairy in China. Among livestock categories, organic cattle recorded the highest output at 486,800 metric tons. Organic aquaculture output reached 878,000 metric tons in total, with organic algae representing the largest subcategory at 540,000 metric tons (CNCA/China Agriculture University 2025, p. 6).

## China's domestic organic market

In the past five years, total sales of organic products produced within China have continuously risen, reaching RMB 120.4 billion in 2024. The total output value, which encompasses products across the entire value chain including exports, reached RMB 357.4 billion in the same year. The largest share of total output value was generated by processed organic products, amounting to RMB 184.8 billion, or 51.7% of the total production value. This reflects the growing economic importance of downstream processing in the organic sector (CNCA/China Agriculture University 2025, p. 9).

The Chinese domestic organic market is heavily concentrated around a small number of product categories, with dairy playing a particularly prominent role. Sterilized milk stood out as the single most significant product across all metrics in 2024: it accounted for 3.93 billion of the 5.62 billion domestic organic certification labels issued, generated RMB 25.45 billion in sales revenue, and reached a sales volume of 985,000 tons. The preference of organic dairy products may be a lasting impact of the 2008 tainted milk scandal, during which approximately 300,000 children fell ill after consuming milk powder contaminated with melamine. To this day, many Chinese consumers remain distrustful of domestic conventional dairy products.

Beyond dairy, baijiu (Chinese liquor) ranked second by revenue at RMB 14.70 billion, while infant formula came third at RMB 11.26 billion. In terms of volume, rice emerged as the second-largest product at 164,800 tons, underlining the continued importance of staple grains alongside premium processed goods in China's organic market (CNCA/China Agriculture University 2025, p. 9).

Among organic crop products<sup>3</sup> sold domestically, vegetables were the highest-earning category (RMB 30.63 billion in 2024), followed by traditional Chinese medicinal herbs (RMB 17.56 billion) and fruits (RMB 14.05 billion) (CNCA/China Agriculture University 2025, p. 10).

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<sup>3</sup> The term "crop products" (农作物产品) in the context of Chinese organic certification refers broadly to plant-based agricultural products grown in cultivated fields, as opposed to animal products, processed foods, or wild-collected goods. "Wild collection" is a distinct certification category in China's statistics, while in the EU framework it falls under "plant production" from the outset. Therefore, when comparing organic area figures between the two systems, China's 3.59 million ha of certified organic crop area and 3.31 million

## Growth potential

China's organic sector presents a paradox: rapid absolute growth coexists with a domestic market that remains underdeveloped by international standards. On a per capita basis, Chinese consumers spent an estimated EUR 9 on organic food in 2023 – less than half the global average of EUR 17 and far behind leading markets such as Switzerland, where per capita organic spending reached EUR 468 (CNCA/China Agriculture University 2025, p. 25). The picture looks similarly modest when viewed through the lens of market share: organic products account for under 2% of total food sales in China, against 12% in Denmark. Furthermore, the ratio of organic product sales revenue to total output value has remained around 33-34% in recent years, suggesting that domestic retail consumption absorbs only a fraction of total organic output value (CNCA/China Agriculture University 2025, p. 25). Taken together, these figures suggest that China's organic market, despite its trajectory, has considerable room to grow.

## Import of organic products

In 2024, 24 Chinese certification bodies conducted organic certification activities in 52 countries and regions outside mainland China against the Chinese organic standard, issuing 557 organic certificates to 274 enterprises (CNCA/China Agriculture University 2025, p. 12). There are two different streams of organic products certified abroad to the Chinese standard, which are documented, traded, and counted in fundamentally different ways (CNCA/China Agriculture University 2025, Chinese full version). First, finished organic products that are certified abroad according to the Chinese organic standard (GB/T 19630), carry the Chinese organic mark via the mark filing system (标志备案), and are imported into China for sale on the Chinese consumer market. Because they enter the domestic retail market as labelled organic products, this trade is counted as part of China's organic product market (see the chapter on "Import of organic products" below). In 2024, this stream amounted to 25,000 tons in volume and 4.35 billion RMB in value, relatively small volumes but high value, dominated by consumer goods such as dairy products, infant formula, wine, and tea, with New Zealand, Denmark, and Ireland as leading partners.

Second, organic "raw materials" (有机产品原料) produced abroad. For these, the certification body issues a Transaction Certificate (贸易证书, TC) that controls the organic identity and the quantity of the consignment, rather than the goods being mark-filed as labelled retail products. These are raw materials/ingredients rather than finished consumer products and were, in 2024, dominated by soybeans, single feed materials, raw milk, alfalfa, lactose/whey powders, i.e. inputs for further processing. These materials are either imported into China as ingredients or traded in bulk abroad and only enter the Chinese market after reprocessing or repackaging. Precisely because of that pathway, TC trade volume and value are *not* counted as part of the Chinese organic product market. They are treated only as a reference indicator for trade in foreign-produced organic raw materials. TC trade was 359,000 tons worth 1.59 billion RMB in 2024, i.e. roughly 14 times the volume but only about a third of the value of the finished-product import trade, typical of a bulk commodity flow versus a high-value consumer goods flow.

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ha of wild collection area would likely be aggregated in an EU-style accounting. Also, certified organic area in China also includes pastureland.

In the following, only the finished organic products are taken into consideration, excluding the TC figures which describe upstream raw material flows that sit outside the domestic market statistics.

China imported certified finished organic products worth approximately RMB 4.35 billion in 2024, sourced from 27 countries and regions spanning five continents. European suppliers dominated, accounting for 10 of the 27 source countries, followed by 9 Asian, 3 Oceanian, 2 North American, 2 South American, and one African source (Tunisia) (CNCA/China Agriculture University 2025, p. 13).

Ireland was the single largest supplier, with a trade value of RMB 1.034 billion - nearly a quarter of total organic import value - reflecting strong demand for Irish infant formula and wine. Denmark ranked second (RMB 0.701 billion), followed by New Zealand (RMB 0.497 billion), Finland (RMB 0.481 billion), and Germany (RMB 0.448 billion) (CNCA/China Agriculture University 2025, p. 14).

*Tab. 3: Top 5 source countries for Chinese organic product imports by trade value (2024)*

Country	Trade Value (Billion RMB)	Share of Total
Ireland	1.034	23.8%
Denmark	0.701	16.1%
New Zealand	0.497	11.4%
Finland	0.481	11.1%
Germany	0.448	10.3%

By certification label issuance volume, New Zealand was the leading source country, accounting for 48.8% of total overseas label issuance (38.44 million labels), with sterilized milk as the primary certified product. Denmark ranked second at 13.5% (10.60 million labels) and Hong Kong third at 12.7% (10.00 million labels) (CNCA/China Agriculture University 2025, p. 14).

The top imported organic products by sales revenue were infant formula (RMB 2,062 million), wine (RMB 484 million), skimmed milk powder (RMB 475 million), and sterilized milk (RMB 366 million). By sales volume, sterilized milk was the largest category at 13,541 tons, followed by infant formula (3,898 tons), wine (1,936 tons), fruit and vegetable juice/purée (1,416 tons), and edible vegetable oil (1,016 tons) (CNCA/China Agriculture University 2025, p. 13).

All imported organic products are required to be manufactured in accordance with Chinese organic standards and certified by a CNCA-accredited Chinese certifier. China's 2024 bilateral cooperation agreements may help reduce friction in certification processes for products from these specific origin countries going forward.

## Export of organic products to the EU

The EU remains the primary destination for the export of Chinese organic products, despite the strict EU regulations. In 2024, China's organic exports to the EU exceeded 239,000 metric tons, accounting for 9% of the total organic EU import volume (European Commission 2025, p. 4, 7).

The exports to the EU exhibit an upward trajectory over the past years. In 2023, expansion was modest (+3%) and narrowly driven, with oilcakes accounting for the bulk of the increase while several other categories - including tropical fruit, nuts and spices - contracted. By 2024, however, growth accelerated sharply to +19% and became considerably broader in scope, with all product categories recording gains. Most notably, Chinese exports of coffee, tea, cocoa, spices, fruits, and nuts to the EU grew by roughly two thirds, emerging as significant secondary categories alongside the long-dominant oilseed segment. This pattern suggests that China is actively diversifying its organic export offer to the EU market, moving beyond its traditional comparative advantage in oilseeds toward higher-value and more varied product lines (European Commission 2024, p. 15, 2025, p. 14).

## Challenges and opportunities

In the past two decades, China has emerged as a significant producer and a large market for organic food. Despite receiving support from the highest political levels - promoted as a means to improve the environment and create income opportunities in rural areas - the sector still faces considerable challenges.

In a rural economy characterized by the world's highest usage of chemical fertilizers and pesticides, organic producers encounter significant cost disadvantages. High conversion costs, the need for multi-year transition periods without premium prices, and the risk of contamination from neighboring conventional farms make organic agriculture economically precarious for many smallholders.

With per capita organic consumption at only EUR 9 and market penetration below 2%, there is substantial headroom for growth in China's domestic market. As urban incomes rise and consumer awareness of food safety and environmental impact increases, demand for verified organic products - particularly dairy, infant formula, and premium produce - is expected to continue expanding.

China is not recognized as an equivalent third country under EU organic import regulations, requiring Chinese organic exports to the EU to undergo certification by an EU-approved control body in addition to domestic Chinese certification. This dual certification requirement generates significant compliance costs and constrains the growth of China's organic export sector. Within the existing EU compliance regime, China is expected to remain dependent on the control body certification route. In 2024, China concluded organic certification instruments of varying scope with four countries: a mutual recognition arrangement with New Zealand, a memorandum of understanding with Denmark, letter of intents with Australia, Chile and Finland. Progress on these, particularly the mutual recognition dimension, creates templates for broader equivalency discussions.

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