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The Current Landscape of Organic Food Products in India: A Pathway towards Sustainable Agriculture

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ABSTRACT

The organic food sector in India has witnessed substantial growth over the past decade, driven by increasing consumer awareness regarding health, food safety, environmental sustainability, and government support for organic farming. India possesses one of the largest numbers of organic producers globally and has emerged as a significant exporter of certified organic products. Despite this progress, the domestic organic food market continues to face several challenges, including high product prices, fragmented supply chains, limited consumer awareness in rural and semi-urban areas, inadequate certification literacy, and issues related to product authenticity and availability. This paper examines the current status of organic food products in India by reviewing recent government reports, industry publications, and academic literature. It analyses key aspects of the organic sector, including production trends, cultivated area, certification systems, market size, export performance, consumer demand, and major government initiatives such as the National Programme for Organic Production (NPOP), Paramparagat Krishi Vikas Yojana (PKVY), Mission Organic Value Chain Development for North Eastern Region (MOVCDNER), and Bharatiya Prakritik Krishi Paddhati (BPKP). The paper further identifies the major opportunities and constraints influencing the growth of the organic food industry and discusses its contribution to sustainable agriculture, environmental conservation, and rural livelihoods. The findings suggest that while India has established a strong foundation for organic agriculture through supportive policies and increasing market demand, sustained growth will require strengthening certification systems, improving market infrastructure, enhancing consumer awareness, promoting digital marketing channels, and ensuring affordable access to organic products. The study concludes that a coordinated approach involving policymakers, producers, certification agencies, marketers, and consumers

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is essential to enhance the competitiveness and long-term sustainability of India's organic food sector.

Keywords: Organic food products, Organic agriculture, India, NPOP, Certification, Organic farming, Consumer awareness, Sustainable agriculture, Government initiatives, Organic market.

Introduction

Investigated, the secondary data available regarding the organic certification data available as per NPOP 2024-25, the prevalence of organic farming, exports of organic products and major states contributed in export, state wise certified processing units and Indian organic market size estimation.

Organic food products have gained significant importance in India due to increasing concerns regarding health, environmental sustainability and food safety (Agricultural and Processed Food Products Export Development Authority (APEDA), 2025). Organic farming avoids synthetic fertilizers and pesticides, promoting ecological balance and biodiversity. India has emerged as a key player in the global organic sector Agricultural and Processed Food Products Export Development Authority (APEDA), 2025). The increasing global awareness of the environmental impact of conventional agriculture is also being popularized in India (Sharma et al., 2024). So, this led to the need for healthy well being for the overall society including the altruistic and egoistic benefits along with the marketing opportunities for value addition organic produce, which is expanding rapidly with the consumer preferences for the shift towards healthier, convenient and sustainable food options. The growing health-conscious consumer base and preference for chemical-free produce and sustainable farming practices are bolstering the growth of organic farming in India (Sharma et al., 2024). The sector's growth is bolstered by these factors, highlighting the increasing demand for healthier lifestyles and sustainable farming practices.

Willer et al., 2024 stated that as per available statistics, India rank 2nd in terms of world's organic agricultural land and 1st in terms of total number of producers. According to APEDA, 2025 India holds a unique position globally in organic agriculture and best-owed with lot of potential to produce all varieties of organic products due to its various agro climatic conditions. In several parts of the country, the inherited tradition of organic farming is an added advantage. These holds promise for the organic producers to tap the market which is growing steadily in the domestic and export sector Agricultural and Processed Food Products Export Development Authority (APEDA), 2025).

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Figure 1: Defining Organic

Organic = Cultivating with care, health and Integrity

India = Organic food basket of the world, rich soil, nutritious food, greener planet

Source: Adapted from APEDA (2025), *Organic Certification Data under NPOP 2024–25.* https://npop.apeda.gov.in/organic-certification-data-under-npop-2024-25

The APEDA, Ministry of Commerce & Industries, Government of India is implementing the National Programme for Organic Production (NPOP). This programme involves accreditation of certification bodies, standards for organic production, promotion of organic farming and and Switzerland for unprocessed plant products as equivalent to their country standards. With these marketing etc (Willer et al., 2024).

The NPOP standards for production and accreditation system been recognized by European Commission recognitions, Indian organic products duly certified by the accredited certification bodies of India are accepted by the importing countries. APEDA is also in the process of negotiation with Australia, South Korea, Taiwan, Canada and Japan etc (Willer et al., 2024).

1.1 Organic recognition agreement: Agreements of India

- The NPOP standards regarding the production and accreditation of system had recognized by European Commission and by Switzerland on un-processed plant products as equivalent to their country standards.
- India, also being actively negotiating with Australia and South Korea for organic Mutual Recognition Agreement (MRA).
- To facilitate trade in products, agreement between India and Taiwan come force on 8th July 2024.

In increasing of the competitive global market for organic products, India must have the opportunity to boost competitive edge by expanding its organic recognition agreements, similarly

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to those of other nations (Sharma et al., 2024). Currently, the India's organic exports pre-dominantly are in bulk, which limits the country's ability to establish a strong brand presence and connect directly with consumers. To enhancement of India's position and boosting its organic exports, a strategic shift is necessary. So, moving from bulk exports to retail packaging will not only increase brand visibility but also build consumer trust and loyalty (Sharma et al., 2024). By focusing on retail packaging, India could effectively demonstrate quality of its organic products and differentiating itself from other competitors and ultimately securing a larger share in the international market.

1.2 Organic Certification Data under NPOP 2024-25

Retrieved the statistics from (APEDA) Agricultural and Processed Food Products Export Development Authority, Government of India 2025

1. **Total Area under NPOP 2024-25**

The following table presents the area covered under the National Programme for Organic Production (NPOP) in India during 2024–25.

Table 1: Organic certification area

AREA under NPOP 2024-25	
Cultivated Area (Organic)	22,54,324.14 ha
Cultivated Area (In conversion)	17,13,713.97 ha
Wild harvest collection area	22,58,859.50 ha

Source: Agricultural and Processed Food Products Export Development Authority (APEDA), *Organic Certification Data under NPOP 2024–25* (2025)

The above table presents the distribution of land area under different categories of organic farming and related activities. The National Programme for Organic Production (NPOP) covered approximately 6.23 million hectares during 2024–25, India emerged as one of the leading country in organic area coverage. Comprising 2.25 million hectares of certified organic cultivated land, 1.71 million hectares under conversion and 2.26 million hectares under certified wild harvest collection (APEDA, *Organic Certification Data under NPOP 2024–25*, 2025)

- Cultivated Area (Organic) 22, 54, 324.14 hectares. This includes the land that is fully certified as organic. Farmers are already following all organic farming standards. No synthetic fertilizers, pesticides, or chemicals are used. The produce from this land can be officially sold as "organic."

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- Cultivated Area (In Conversion) 17, 13, 713.97 hectares. This is land that is in the process of becoming organic. Farmers have started shifting from conventional to organic farming. The transition period usually takes 2–3 years. During this time, the produce cannot yet be labeled as fully organic.

- Wild Harvest Collection Area 22, 58, 859.50 hectares. This includes areas where naturally growing products are collected. No cultivation is done; products grow in forests or natural environments. Examples: herbs, medicinal plants, wild fruits, honey, etc. These can be certified organic if collected following proper guidelines.

A large portion of land is already certified organic, showing strong adoption. A significant area is under conversion, indicating future growth in organic farming, growing interest of farmers in adopting organic farming practices. The wild harvest area is also substantial; demonstrated India's rich natural resource base and contributing for organic products without cultivation.

2. Production under NPOP 2024-25

The following table presents the production of organic products under the National Programme for Organic Production (NPOP) during 2024–25.

Table 2: Organic certification production

Production under NPOP 2024-25	
Farm Production (Organic)	43,91,083.37 MT
Farm Production (in conversion)	3,08,709.64 MT
Wild Harvest Production	32,058.07 MT

*****The data on production is the commercial output for sale and not the actual production.

Source: Agricultural and Processed Food Products Export Development Authority (APEDA), *Organic Certification Data under NPOP 2024–25* (2025)

According to APEDA, 2025 the production statistics under the NPOP for 2024–25 revealed that India produced approximately 4.73 million metric tonnes of organic products. Certified organic farms contributed 4.39 million metric tonnes, accounting for nearly 92.8 percent of total production. Farms under conversion produced 0.31 million metric tonnes, indicating the continued expansion of organic farming in the country. Wild harvest production contributed 32,058.07 metric tonnes, reflecting the utilization of natural ecosystems for the collection of

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certified organic products. The dominance of certified organic farm production demonstrates the growing maturity and commercial viability of India's organic agriculture sector.

3. Organic Exports under NPOP 2024-25

The export statistics indicate the significant contribution of India's organic sector to international trade. The details are explained below:

Table 3: Organic exports

Organic export under NPOP 2024-25	
Total Export Quantity	3,68,155.04 MT
Total Export value (INR)	5,394.32 MT
Total Export value (US$)	665.97 MILLION USD

Source: Agricultural and Processed Food Products Export Development Authority (APEDA), *Organic Certification Data under NPOP 2024–25* (2025)

According to APEDA, 2025 India exported 368,155.04 metric tonnes of organic products during the 2024-25, with export earnings of ₹5,394.32 crore (US$ 665.97 million). The export performance highlights the expanding global market for Indian organic products and reflects the increasing acceptance of certified organic foods in international markets.

Overall, the data reflects a strong presence of certified organic farming along with significant potential for future growth, as a large area is currently undergoing conversion and wild collection further contributes to the organic sector. Together, these statistics highlights the expanding scope and potential of the organic sector in India and demonstrated the increasing adoption of organic farming practices and the growing significance of organic agriculture in India's sustainable agricultural development. Also, the growing export values demonstrated the economic potential of organic agriculture and its contribution to income of farmers, foreign-exchange earnings and sustainable agricultural development.

4. Operators under NPOP 2024-25

The following table presents the number of certified operators engaged in India's organic sector under the organic certification system.

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Table 4: Operators

Operators under NPOP 2024-25	
Individual farm producer	5,009
Grower group	5,566 (total farmers in grower groups: 21,84,807)
Processor	1,324
Trader	611
Wild operators	127
Total operators	12,637

*Information provided by the certification bodies accredited under NPOP on Tracenet

Source: Agricultural and Processed Food Products Export Development Authority (APEDA), *Organic Certification Data under NPOP 2024–25* (2025)

According to APEDA, 2025 the organic certification system in India comprises of 12,637 certified operators, including farm producers, grower groups, processors, traders and wild collection operators. Among all, grower groups represented the most significant category, encompassing 5,566 groups with approximately 2.18 million farmers. This demonstrated the dominance of collective certification mechanisms in India's organic sector, particularly among small and marginal farmers. The presence of certified processors and traders further indicated the development of an integrated organic value chain, supporting production, processing, marketing and export activities.

5. Farm Area & Production

State wise certified farm area and production under NPOP during 2024-25

The following table presents the state-wise distribution of certified organic area & production under organic farming in India under the National Programme for Organic Production (NPOP) during 2024–25.

Table 5: Certified farm area & production state wise

S.no.	State Name	Farm Area & Production	
		Total Area (in Ha) Organic + Conversion Area	Total Production (In MT) Organic + Conversion Production
1	Madhya Pradesh	1,013,456.22	1,400,152.96
2	Maharashtra	966,544.71	1,199,152.59
3	Rajasthan	551,749.55	567,439.49
4	Gujarat	437,033.00	426,518.23

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5	Odisha	200,112.07	258,230.18
6	Sikkim	75,710.40	52.46
7	Uttarakhand	94,424.76	39,439.09
8	Uttar Pradesh	69,068.57	189,389.99
9	Kerala	42,903.65	25,677.35
10	Karnataka	53,631.61	286,696.19
11	Andhra Pradesh	52,930.02	25,460.16
12	Telangana	92,211.04	48,108.75
13	Jammu & Kashmir	32,273.74	66,293.34
14	Meghalaya	29,675.13	13,467.82
15	Bihar	29,940.71	55,501.64
16	Tamil Nadu	32,430.12	25,997.80
17	Assam	22,696.61	11,309.73
18	Goa	11,750.22	2,298.79
19	Tripura	20,455.36	398.62
20	Manipur	32,520.50	-
21	Himachal Pradesh	8,564.09	5,244.25
22	West Bengal	7,549.22	14,214.72
23	Chhattisgarh	6,822.16	14,039.92
24	Arunachal Pradesh	14,943.06	-
25	Mizoram	8,000.00	-
26	Jharkhand	29,701.41	5,697.14
27	Punjab	11,058.16	11,118.08
28	Nagaland	17,453.77	5,184.81
29	**Haryana**	**2,399.99**	**2,708.96**
30	Pondicherry	18.67	-
31	New Delhi	9.60	-
Total		**3,968,038.11**	**4,699,793.01**

*Information provided by the certification bodies accredited under NPOP on Tracenet

*The data on production is the commercial output for sale and not the actual production

Source: Agricultural and Processed Food Products Export Development Authority (APEDA), *Organic Certification Data under NPOP 2024–25* (2025)

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According to APEDA, 2025 state wise distribution of organic farming area under the NPOP reveals considerable regional variation in the adoption of organic agriculture across India. Madhya Pradesh emerged as the leading state with 1.01 million hectares under organic management, followed by Maharashtra (966,544.71 ha), Rajasthan (551,749.55 ha) and Gujarat (437,033.00 ha). Together, these states account for a substantial share of India's organic farming area.

In contrast, Haryana recorded only 2,399.99 hectares under organic management, comprising 2,044.92 hectares of certified organic area and 355.07 hectares under conversion (APEDA, 2025). It is indicating a relatively low level of adoption despite of its strong agricultural base and the substantial area under conversion across several states reflects growing interest among farmers in transitioning toward sustainable and organic agricultural practices.

The production includes both certified organic production and production from areas under conversion. According to Agricultural and Processed Food Products Export Development Authority (APEDA), *Organic Certification Data under NPOP 2024–25* (2025) the state-wise production of organic products under the NPOP during 2024–25 statistics indicated substantial regional disparities in organic agricultural output across India. Maharashtra emerged as the leading producer with 1.40 million metric tonnes, followed by Madhya Pradesh (1.20 million MT) and Rajasthan (567,439.49 MT). Together, these three states accounted for over two-thirds of the country's total organic production. Gujarat demonstrated significant potential for future growth, recording the highest conversion production among all states.

Haryana contributed 2,708.96 metric tonens of certified organic products during 2024–25 (APEDA, 2025). The state recorded no production from conversion areas during the period. Despite being one of India's leading agricultural states, Haryana's contribution to national organic production remains relatively low. This suggests considerable scope for expanding organic farming and increasing certified organic output through ongoing government initiatives and farmer participation (APEDA, 2025).

6. Wild Area & Production

State wise certified wild area and production under NPOP during 2024-25

The following table presents the state-wise wild area and collection/ production under organic farming in India under the National Programme for Organic Production (NPOP) during 2024–25.

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Table 6: Certified wild area and collection/ production state wise

Wild Area and Production			
S.no.	**State Name**	**Organic Area (In Ha)**	**Organic Production (In MT)**
1	Madhya Pradesh	1,129,229.71	6,008.90
2	Chhattisgarh	516,038.12	772.88
3	Rajasthan	352,708.34	15,616.65
4	Punjab	63,879.73	403.15
5	Uttar Pradesh	53,637.00	1,026.31
6	Himachal Pradesh	49,115.76	-
7	Jharkhand	29,269.90	221.62
8	Meghalaya	25,000.00	-
9	Maharashtra	15,406.55	68.85
10	Goa	6,088.94	5,372.99
11	Ladakh	5,000.00	1,152.23
12	Uttarakhand	3,024.26	10.00
13	Assam	2,500.00	-
14	Jammu & Kashmir	2,100.00	851.30
15	Tamil Nadu	1,759.51	2.20
16	Karnataka	1,638.98	84.38
17	West Bengal	1,122.00	-
18	Odisha	935.00	382.39
19	Kerala	404.00	0.52
20	Andhra Pradesh	1.70	-
Total		**2,258,859.50**	**31974.37**

*Information provided by the certification bodies accredited under NPOP on Tracenet

Source: Agricultural and Processed Food Products Export Development Authority (APEDA), *Organic Certification Data under NPOP 2024–25* (2025)

According to APEDA, 2025 state-wise certified wild harvest collection area under the NPOP revealed high concentration of organic wild resource management in forest-rich states. Madhya Pradesh emerged as the leading state with 1.13 million hectares of area, accounting for nearly half of the national wild harvest area, followed by Chhattisgarh (516,038.12 ha) and Rajasthan (352,708.34 ha) (APEDA, 2025). Together, these states contribute approximately 88 percent of India's total certified wild harvest collection area. The dominance of these states highlighted importance of forest ecosystems and biodiversity in supporting India's organic sector. The certified wild harvest area serves as an important source of organic medicinal plants, herbs, spices, honey and other non-timber forest products for domestic consumption and export markets.

Additionally, according to APEDA, 2025 state-wise wild harvest organic production statistics under the NPOP indicated that India produced 31,974.37 metric tonnes of certified wild organic products during 2024–25. Rajasthan emerged as the leading producer with 15,616.65 metric tonnes production, accounting for nearly half of the national production, followed by Madhya Pradesh (6,008.90 MT) and Goa (5,372.99 MT). Together, these three states contributed more than 84 percent of India's total wild harvest organic production.

The wild harvest area (2.26 million ha) is almost equal to the certified organic cultivated area (2.25 million ha) under NPOP. While wild harvest production (31,974.37 MT) represented less than 1% of India's total organic production, though it is economically important because many wild collected products such as medicinal herbs, essential oils, spices and natural extracts command high prices in domestic and international markets (APEDA, 2025). So, this demonstrated that forest-based organic resources are as important as cultivated organic farming and highlighted the significant role of forest ecosystems and biodiversity in supporting the organic sector through the sustainable collection of medicinal plants, herbs and other non-timber forest products. Wild harvest certification provides an important avenue for enhancing rural livelihoods, conserving natural resources and expanding India's organic export potential.

Although Haryana is one of India's leading agricultural states, its organic area remains relatively small compared to states such as Madhya Pradesh, Maharashtra, Rajasthan, and Gujarat. This can be attributed to the state's historical dependence on intensive conventional agriculture associated with the Green Revolution (APEDA, 2025). However, recent government initiatives promoting natural and organic farming are expected to increase the organic area in the coming years.

1.3 Prevalence of organic farming in India

According to Centre for Energy, Environment and Water (2021) organic farming is practiced across almost all states in India, with Sikkim formally declared a 100 percent organic state in 2016. The top three states, accounting for almost half of the area under organic cultivation, are Madhya Pradesh, Rajasthan and Maharashtra.

A recently published report by the Centre of Science and Environment (Khurana and Kumar, 2020) highlighted small fraction of most states were under organic farming. The top three states that accounted for the largest area under organic cultivation were Madhya Pradesh, Rajasthan

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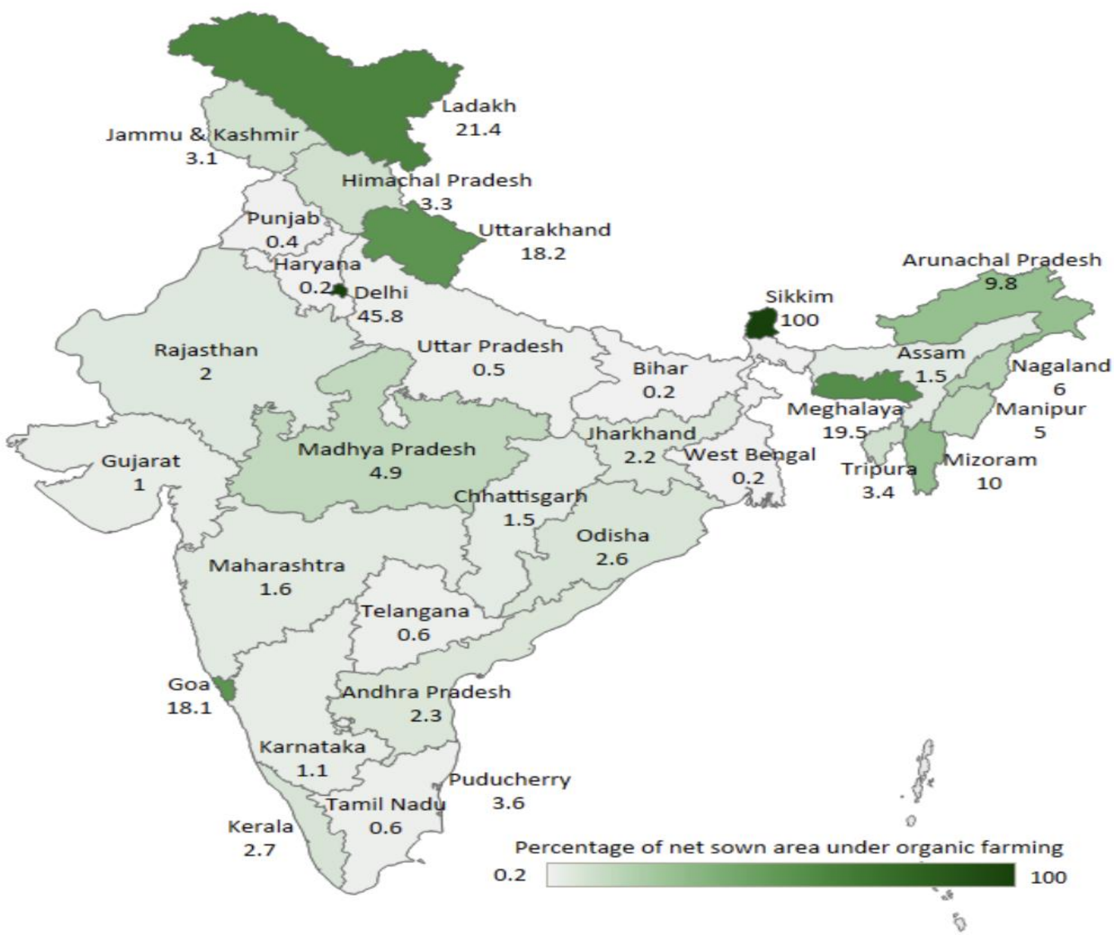
and Maharashtra with having only 4.9, 2.0 and 1.6 percent respectively of their net sown area under organic farming. Other states, such as Meghalaya, Mizoram, Uttarakhand, Goa and Sikkim have 10 percent or more of their net sown area under organic.

Figure 2: State-wise organic coverage (proportion to the net sown area of the state)



Source: Gupta et al., (2021). *Sustainable Agriculture in India 2021: What We Know and How to Scale Up.* Council on Energy, Environment and Water (CEEW)

According to the Centre for Energy, Environment and Water CEEW (2021) report on sustainable agriculture in India, organic farming is practiced across almost all states, but the proportion of net sown area under organic cultivation varies significantly among states. Sikkim is India's first 100% organic state, officially declared in 2016. States such as Meghalaya, Mizoram, Uttarakhand, Goa, and Sikkim have more than 10% of their net sown area under organic farming**.** Although Madhya Pradesh, Rajasthan, and Maharashtra account for nearly half of

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India's total organic cultivation area, the proportion of their net sown area under organic farming remains relatively low: Madhya Pradesh – 4.9%**,** Rajasthan – 2.0% and Maharashtra – 1.6% (CEEW, 2021).

According to the CEEW (2021), Haryana has only 0.2 percent of its net sown area under organic farming which indicates very low level of adoption. The state's agricultural sector is largely dominated by intensive conventional farming practices, particularly the wheat–rice production system, which relies heavily on chemical inputs and irrigation. Consequently, organic farming remains a niche practice in Haryana. The findings highlight the need for greater policy support, farmer awareness, certification mechanisms, and market linkages to promote the adoption of organic farming in the state and enhance agricultural sustainability (Gupta et al., 2021).

Major crops cultivated under organic farming in India: In 2019-20, India produced 2.75 million tonnes of certified organic products, including all varieties of food products such as oilseeds, sugarcane, cereals and millets, cotton, pulses, aromatic and medicinal plants, tea, coffee, fruits, and vegetables, spices, dry fruits and processed food (Centre for Energy, Environment and Water CEEW, 2021).

In terms of share of export value of processed organic foods, soya meal takes the lead (45.87 percent), followed by oilseeds (13.25 percent), plantation crop products such as tea and coffee (9.61 percent), cereals and millers (8.19 percent), spices and condiments (5.20 percent), dry fruits (4.98 percent) and medicinal plants (3.84 percent) (Centre for Energy, Environment and Water (CEEW), 2021).

Production of organic products: India produced around 3.55 million metric tonnes of organic produce (including in conversion production but excluding wild harvest) during fiscal 2024 under NPOP certification system, which includes food categories such as cereals, pulses, millets, oil seeds, fruits, vegetables, sugar, dry fruits and processed foods alongwith the non- food categories such as fodder and fibre (Sharma et al., 2024). India's organic production clocked a CAGR of 7% from fiscal 2020 to 2024, including organic fibres. However, excluding organic fibres, the CAGR declined to -6%. India is one of the leading producers of organic cotton globally and harvested 1.7 million metric tons of organic fibres, in addition to organic food products (Sharma et al., 2024).

India as a world leader in organic cotton production: According to the Centre on Energy, Environment and Water (CEEW), 2021 India contributed 51 percent (37,138 MT) of the global organic cotton production in 2018-19. India also had the most land under cotton in organic conversion, at 23,251 ha, followed by Pakistan (17,632 ha) and Turkey (6,148 ha).

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1.4 EXPORTS DATA

1. Country wise export of organic products from India during 2024-25

The following table presents the major export destinations of Indian organic products during 2024–25 in terms of export quantity, export value in Indian Rupees and export value in US dollars.

Table 7: Export of organic products

S.no.	Country Name	Exported Qty (In MT)	Total Value (In Crore)	Total Value (In USD Million)
1	U.S.A.	131,306.81	2,677.24	330.52
2	European Union	94,230.22	1,702.71	210.21
3	Angola	21,200.00	82.83	10.23
4	Vietnam	17,228.58	75.85	9.36
5	Great Britain	16,954.66	187.69	23.17
6	Mozambique	12,915.00	50.59	6.25
7	Canada	12,571.36	156.00	19.26
8	Kenya	11,670.53	46.50	5.74
9	Malaysia	7,965.40	34.57	4.27
10	Benin	6,740.00	27.65	3.41
TOTAL		**368,155.04**	**5,394.32**	**665.97**

*Information provided by the certification bodies accredited under NPOP on Tracenet

Source: Agricultural and Processed Food Products Export Development Authority (APEDA), *Organic Certification Data under NPOP 2024–25* (2025)

According to APEDA, 2025 country-wise export statistics of Indian organic products for 2024–25 revealed the dominant role of developed economies in driving demand for certified organic products. The United States emerged as the largest importer, accounting for 131,306.81 metric tonnes valued at US$ 330.52 million, followed by the European Union with imports of 94,230.22 metric tonnes valued at US$ 210.21 million.

Together, these markets contributed more than 81 percent of India's total organic export earnings. The export performance demonstrated the growing global acceptance of Indian organic products and highlighted the importance of certification systems such as NPOP in facilitating access to international markets. The increasing diversification of exports toward African and

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Asian countries further indicated the expanding opportunities for India's organic sector in emerging markets (APEDA, 2025).

The Key Export Destinations: According to the Ministry of Agriculture and Farmers Welfare (2025), Press Information Bureau, Government of India.Organic produce from India is primarily shipped to the USA, European Union, Great Britain, Canada and Australia**.**

2. Export of organic products during the last five years

The following table presents the quantity and value of organic food products exported from India during the last five years and the current year under the National Programme for Organic Production (NPOP**)**, 2025.

Table 8: Total amount of organic food products exported during five year and current year

Export of Organic Products from India (2019–20 to 2024–25)		
Year	**Quantity (MT)**	**Value (USD Million)**
2019-20	63,8998.42	689.10
2020-21	88,8179.68	1040.95
2021-22	46,0320.40	771.96
2022-23	31,2800.51	708.33
2023-24	26,1029.00	494.80
2024-25	26,3050.11	447.73

*Information provided by certification bodies accredited under NPOP on tracenet export till date 25/11/2024

Source: Ministry of Agriculture and Farmers Welfare (2024), Press Information Bureau, Government of India.

According to Ministry of Agriculture and Farmers Welfare (2024), Press Information Bureau, Government of India the export performance of Indian organic products exhibited considerable fluctuations during the period 2019–20 to 2024–25. Organic exports reached their highest level in 2020–21, with a quantity of 888,179.68 metric tonnes valued at US$ 1,040.95 million.

This growth was largely driven by increased global demand for organic and health-oriented products during the COVID-19 pandemic (Ministry of Agriculture and Farmers Welfare (2024). However, a declining trend was observed in subsequent years, with export quantity falling to 263,050.11 metric tonnes and export value declining to US$ 447.73 million by 2024–25. The reduction in export performance may be attributed to changing global market conditions, supply chain challenges and increased international competition. Nevertheless, the continued export of organic products highlighted India's significant role in the global organic food market.

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3. State-wise export of organic products certified under NPOP

The table presents the state-wise export performance of organic products certified under NPOP**,** based on exports made by exporters registered in the respective states and measured in terms of export value (USD million) and export quantity (metric tonnes).

Table 9: State wise export of organic products under NPOP

State-wise Export of Organic Products Certified under NPOP (2022–23 to 2024–25)							
S.no.	**State Name**	**Total Value (in USD Million)**			**Exported Quantity (in MT)**		
		2022-23	**2023-24**	**2024-25**	**2022-23**	**2023-24**	**2024-25**
1	Andhra Pradesh	6.27	17.48	35.92	1,932.53	4,853.25	9,822.78
2	Assam	0.02	0.08	0.19	3.49	19.68	55.52
3	Chandigarh	0.05	0.00	0.00	55.17	0.00	0.00
4	Chhattisgarh	0.37	0.17	0.20	18.59	5.69	5.73
5	Daman& Diu	19.40	2.21	1.09	15,361.90	2,357.42	1,606.42
6	Goa	0.31	0.34	0.38	33.16	49.10	42.30
7	Gujarat	112.81	67.18	84.78	65,581.24	19,621.45	26,529.73
8	**Haryana**	**54.49**	**77.77**	**104.56**	**41.302.43**	**69,432.01**	**86,209.31**
9	Himachal Pradesh	0.34	4.81	3.36	22.45	1,750.72	947.46
10	Jammu & Kashmir	1.02	0.87	0.48	373.41	558.82	321.04
11	Karnataka	58.95	63.35	59.39	12,641.00	27,977.92	16,259.65
12	Kerala	24.14	76.39	76.39	3,937.24	13,347.49	82,606.18
13	Madhya Pradesh	78.99	47.93	42.99	66,734.98	51,170.34	42,004.53
14	Maharashtra	195.47	42.35	73.08	56,697.89	32,478.60	46,854.37
15	New Delhi	28.79	3.20	1.59	23,831.17	1,154.50	1,712.44
16	Odisha	0.00	0.00	0.02	0.00	0.00	2.40

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17	Punjab	0.96	4..48	2.63	1,034.78	3,126.34	1,545.36
18	Rajasthan	10.11	18.20	30.16	6,463.69	12,753.41	19,066.13
19	Tamil Nadu	13.59	14.90	25.98	5,799.30	5,630.00	10,586.20
20	Telangana	30.23	37.74	39.72	3,864.77	6,015.41	4,887.50
21	Uttar Pradesh	39.12	23.20	45.57	3,086.16	5,152.34	11,969.02
22	Uttarakhand	0.54	1.21	1.59	96.88	512.70	586.30
23	West Bengal	32.40	25.55	35.29	3,928.99	3,079.83	4,534.69
Total		**708.36**	**494.80**	**665.97**	**3,12,800.51**	**2,61,029.01**	**3,68,155.04**

*State wise data, based on exports of the exporters registered in respective state.

Source: Ministry of Agriculture and Farmers Welfare (2024, December 3), Press Information Bureau, Government of India.

According to Ministry of Agriculture and Farmers Welfare (2024), Press Information Bureau, Government of India. The state-wise export statistics of organic products certified under NPOP revealed the substantial regional variation in export performance. Haryana emerged as the leading exporting state in 2024–25, generating export earnings of US$ 104.56 million and exporting 86,209.31 metric tonnes of organic products. Gujarat, Kerala, Maharashtra, and Karnataka also contributed significantly to India's organic exports (Ministry of Agriculture and Farmers Welfare, 2024). The data indicated strong recovery in national organic exports during 2024–25 following a decline in 2023–24 (Ministry of Agriculture and Farmers Welfare, 2024). Overall, the export performance highlighted the growing global demand for Indian organic products and the expanding role of certified organic supply chains in international trade.

Haryana's outstanding performance showed a notable finding is Haryana's rapid export growth with export value increased by approximately 92% between 2022–23 and 2024–25 and export quantity increased by approximately 109% during the same period (Ministry of Agriculture and Farmers Welfare, 2024). This indicated the increasing importance of Haryana's organic export infrastructure more specifically in terms of processing facilities, export oriented enterprises and market linkages in overall enhancing the competitiveness of India's organic sector.

4. Category wise export of organic products during 2024-25

The category-wise export statistics of organic products certified under the National Programme for Organic Production (NPOP) provide insights into the composition of India's organic exports. During 2024–25, India exported 368,155.04 metric tonnes of organic products valued at ₹5,394.32 crore (US$ 665.97 million).

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Table 10: Category wise export of organic products

Category wise export of organic products from India (2024-25)				
S.no.	**Category**	**Exported Qty (In MT)**	**Total Value (In Crore)**	**Total Value (In USD Million)**
1	Cereals & Millets	189,094.32	1,309.55	161.67
2	Processed Food	84,317.67	1,247.51	154.01
3	Oil Seeds	23,629.25	293.22	36.20
4	Sugar	16,034.92	176.70	21.81
5	Fodder	9,296.63	64.65	7.98
6	Pulses	7,801.09	144.93	17.89
7	Spices & Condiments	6,991.29	367.90	45.42
8	Medicinal Plant Products	6,884.04	717.44	88.57
9	Others	6,760.49	147.53	18.21
10	Tea	5,980.19	365.55	45.13
11	Coffee	4,216.43	195.97	24.19
12	Fresh Fruits & Vegetables	3,922.99	74.48	9.20
13	Dry Fruits	1,896.07	143.01	17.66
14	Tuber Products	496.34	8.50	1.05
15	Flowers	401.91	33.31	4.11
16	Essential oil	280.82	100.00	12.35
17	Miscellaneous	149.63	3.76	0.46
18	Oils & Oleoresins	1.04	0.33	0.04
TOTAL		**368,155.04**	**5,394.32**	**665.97**

*Information provided by the certification bodies accredited under NPOP on Tracenet.

Source: APEDA (2025), *Organic Certification Data under NPOP 2024–25.*

https://npop.apeda.gov.in/organic-certification-data-under-npop-2024-25

According to Agricultural and Processed Food Products Export Development Authority (APEDA, 2025). The category-wise export composition of organic products during 2024–25 highlighted the diversified nature of India's organic export sector. Cereals and millets emerged as the dominant export category, accounting for 189,094.32 metric tonnes valued at US$ 161.67 million. Processed food products ranked second with export earnings of US$ 154.01 million, reflecting the growing importance of value addition in the organic supply chain. Medicinal plant products generated US$ 88.57 million despite relatively low export volumes, indicating their

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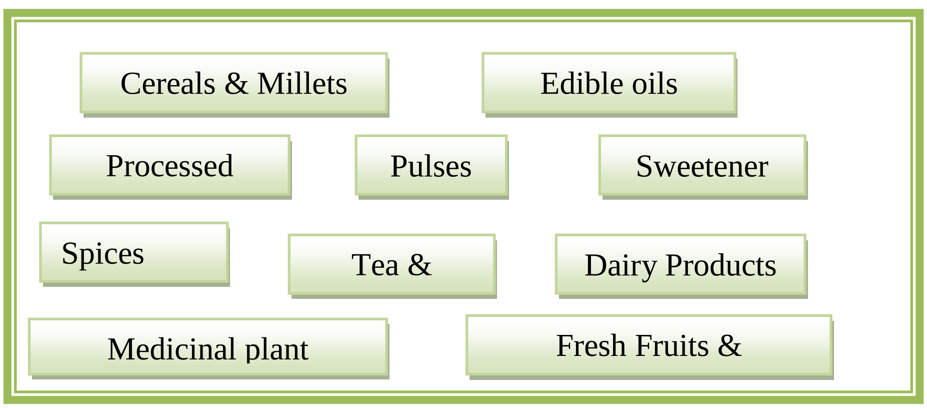
high market value in international markets (Agricultural and Processed Food Products Export Development Authority, APEDA 2025). Organic tea, coffee, spices, and essential oils also contributed significantly to export earnings. The findings demonstrated that bulk commodities dominate export volumes despite of value added and specialty organic products play important role in enhancing the India's organic export revenue and global competitiveness.

1.5 Indian organic market size estimation

In fiscal 2023, the total Indian organic market is estimated to have been at Rs 16,800 crore (~$2 billion26), accounting for 1.4% of the global organic market in 2022 ($142 billion) (Sharma et al., 2024). In comparison with the Indian FMCG market, worth $167 billion27, the organic market holds only a 1.2% share. Despite India ranking second globally in terms of land area under organic agriculture and first in the number of farmers engaged in organic farming, the market size remains relatively modest (Sharma et al., 2024).

Figure 3: Categories under Indian domestic organic market



Source: Adapted from, Study of Indian organic market and export promotion strategy. CRISIL Market Intelligence & Analytics

1. **Category-wise domestic organic market**

The Indian domestic organic market can be classified into various categories, including cereals and millets, pulses, spices, edible oils, sweeteners, tea, coffee, dairy products, fruits and vegetables, processed foods and medicinal plant products (supplements). While India also produces and exports organic feed and flowers but these categories constitute only 2.2% and less than 1% of total organic production, respectively (Sharma et al., 2024). Their export shares are similarly modest at 2% and less than 0.1%. Additionally, domestic demand for these products is

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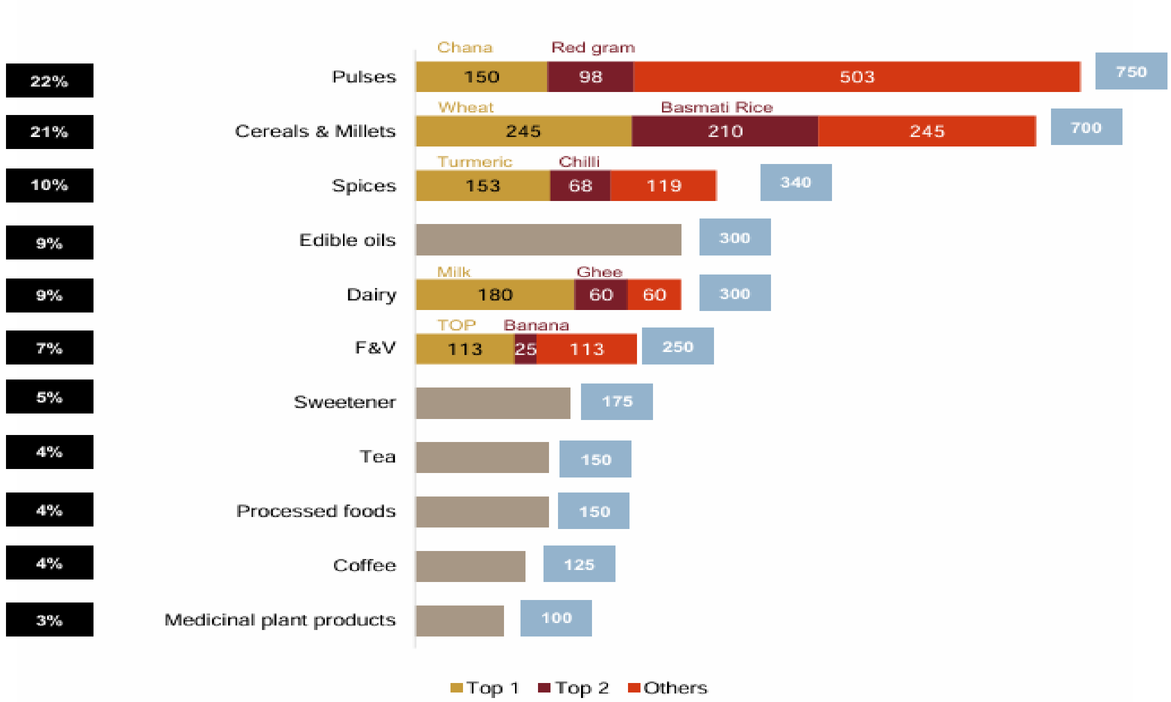
negligible at less than 0.01%. Consequently, feed and flowers have been excluded from the analysis of the domestic organic market (Sharma et al., 2024).

Figure 4: Category wise domestic organic market FY 23 (in Rs Crore)



Source: Adopted from pg. 43, Sharma, et al., 2024. *Study of Indian organic market and export promotion strategy*. CRISIL Market Intelligence & Analytics

According to report study of Indian organic market and export promotion strategy (Sharma et al., 2024). In the Indian organic market, organic pulses lead with a market value of Rs 750 crore ($89.7 million), accounting for 22% of the total domestic market. With wheat flour (atta), basmati rice and non-basmati rice as top selling products (Sharma et al., 2024).

Organic cereals and millets constitute the second-largest category, with the market size estimation of Rs 700 crore, capturing 21% of the total domestic market share. The top selling products, wheat flour (atta) has the highest share of 35% in the northern and eastern regions, while rice is predominant in the southern and western regions due to regional dietary preferences. Millets have experienced exponential growth of more than 25% annually, driven by increased post-pandemic consumption and government initiatives such as the 'International Year of Millets 2023 (Sharma et al., 2024).

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The segment of sweetener having the market size of Rs 175 crore, 5% of total domestic market and with major selling products jaggery and honey (Sharma et al., 2024). The dairy products hold smaller shares of 9% in domestic market with Rs 300 crore as market size estimation with organic milk, ghee and curd as top selling products (Sharma et al., 2024).

Fruits & vegetables (F&V) category, hold smaller share of 7% in domestic market with Rs 250 crore as market size estimation with Bananas, onions, potatoes and tomatoes as major selling products. However, obtaining NPOP certification for seasonal crops is challenging and expensive for farmers. Additionally, inadequate availability of processing and cold chain infrastructure has resulted in low export share of fresh F&V at around 0.5%, and a modest 7% share in the domestic organized market. In contrast, the un- organized market for fresh F&V is estimated to have a share of more than 40% (Sharma et al., 2024).

Table 11: Top selling products under major category

Major Categories	**Market size estimation (as of fiscal 2023)**	**Top selling products**
Organic pulses	Rs 750 crore	Chana, tur dal, moong dal
Organic cereals	Rs 700 crore	wheat flour (atta), basmati rice, non-basmati rice
Organic spices	Rs 340 crore	Turmeric, coriander, chilli
Organic dairy	Rs 300 crore	Organic milk, ghee, curd
Organic beverages	Rs 275 crore	Tea & Coffee
organic fruits and vegetables	Rs 250 crore	Onions, potatoes, tomatoes
Sweetener	Rs 175 crore	Jaggery & Honey
Organic processed foods ready-to-eat (RTE) and ready-to-cook (RTC)	Rs 150 crore	In RTE- Snacks & energy bars In RTC- breakfast items such as poha, oats, organic baby foods

Source: Adapted from pg. 43, Sharma, et al., 2024. *Study of Indian organic market and export promotion strategy*. CRISIL Market Intelligence & Analytics

2. Domestic market outlook

The India's domestic organised organic market, valued at Rs 3,340 crore ($400 million) in fiscal 2023, will projected to clock CAGR of 13-15% until fiscal 2033. India's FMCG sector, on the other hand, will expected to grow 8.3%. The domestic organic market will expected to reach Rs 12,500 crore ($1.4 billion) by the end of fiscal 2033 (Sharma et al., 2024). Categories such as processed food products were projected to be the fastest-growing segment, with an estimated CAGR of 25% and followed by fresh fruits and vegetables at 18% and dairy at 16% (Sharma et

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al., 2024). Within the processed food category, items such as breakfast cereals (including oats and poha), ready-to-cook (RTC) products (such as organic pasta and kids' food) and ready-to-eat (RTE) products (such as organic snacks and energy bars) will expected to drive growth. This trend could largely be attributed to consumers increasing preference for healthy and convenient foods, alongside rising disposable incomes. While major categories like pulses and cereals may see a reduction in market share, they are expected to remain dominant in terms of value in the domestic organic market (Sharma et al., 2024).

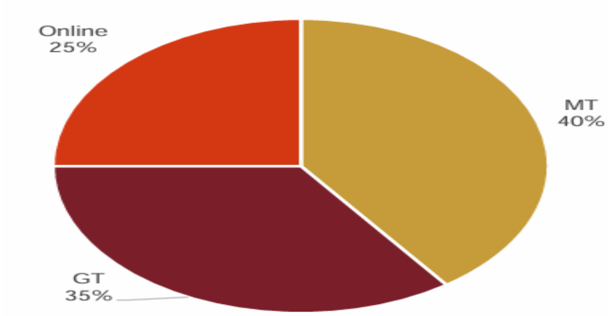
Branding and promotion by the private sector: Private sector entities actively promoting and branding organic food products through several of the initiatives, partnerships and innovative business models. Few leading brands such as 24 Organic Mantra, Organic India, Nature Bio Foods, Reliance Fresh Organic, ITC's Aashirvaad Organic, Big-Basket (Sharma et al., 2024).

3. Market channels of organic products in India

Organic foods and farm products are available to Indian consumers through three distribution channels - modern trade (MT), general trade (GT) and online platforms (e-commerce and quick commerce) (Sharma et al., 2024).

There are significant changes in food purchasing habits emerging nowadays, owing to the consumer behavioural change after the Covid pandemic, increased e-commerce penetration, urbanisation and evolving consumer preferences (Sharma et al., 2024). Traditionally, most grocery purchases were made in-store, driven by factors such as the cost of delivery fees and perceived freshness of fruits and vegetables when personally selected. However, the expansion of the e-commerce industry, fuelled by deepening mobile internet penetration and increased smart device usage, has significantly boosted the online grocery market (Sharma et al., 2024).

Figure 5: Share of organic products market by distribution channels in FY 23 (%)



Source: Adopted from pg. 48, Sharma, et al., 2024. *Study of Indian organic market and export promotion strategy*. CRISIL Market Intelligence & Analytics

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Currently, about 40% of the organic product sales occur through MT, 35% through GT and the balance 25% through online platforms (Sharma et al., 2024). The growth of the online grocery market is propelled by urbanisation and technological advancements in recent years, offering consumers the convenience of home delivery. Sharma et al., 2024 learned from their industry interactions that during pre-Covid the share of online sales was less than 10% but post-Covid it has been increased to nearly 30%. The shift has pushed up the demand for organic products and making them more accessible to a broader audience. As a result, the online grocery market for organic products is growing strongly, reflecting a significant transformation in consumer buying behaviour.

Owing to the increasing demand for organic products many e-commerce players have started sourcing materials directly from farmers/FPOs which eventually increased their turnover and farmers' income (Sharma et al., 2024). E-commerce players such as Amazon and Flipkart have started a separate 'Organic Store' category in their product categories. BigBasket, one of the leading online grocery platforms, has launched its own organic brand, BB Royal Organic, to cater to the needs of its customers (Sharma et al., 2024).

According to report *study of Indian organic market and export promotion strategy by* Sharma et al., 2024 sales of pulses and cereals through online platforms are comparatively lower than other product categories such as spices, beverages, sweeteners and F&V (fruits & vegetables), owing to their value-to-weight ratio33. This ratio indicates that these items, being bulkier than their value, incur higher transportation costs and logistical challenges, which can make them less attractive for online purchases compared with lighter, higher-value products.

Therefore, these trends clearly highlighted the shift towards organic products globally and domestically as well and being driven by health consciousness, environmental concerns and increasing availability of organic products options in retail markets.

1.6 Conclusion

The analysis of secondary data revealed that India has emerged as a significant player in the global organic sector, ranking among the leading countries in terms of organic agricultural area and the number of organic producers. The findings indicated strong foundation for the growth of organic agriculture, supported by a large certified organic area, substantial land under conversion, extensive wild harvest resources and a well-established certification framework under the National Programme for Organic Production. The presence of over 12,000 certified operators and more than 1,000 certified processing units further demonstrated the development of an integrated organic value chain in the country. Organic agriculture in India is experiencing steady expansion, driven by increasing consumer awareness, growing export demand, supportive government initiatives and rising concerns regarding health, food safety, and environmental sustainability. The study identified the following key findings:

- India ranks among the leading countries globally in terms of organic agricultural area and ranks first in the number of organic producers, highlighting its strong organic farming potential.
- During 2024–25, approximately 6.23 million hectares were covered under NPOP certification, including 2.25 million hectares of certified organic land**,** 1.71 million hectares under conversion**,** and 2.26 million hectares under wild harvest collection, indicating significant future growth prospects.
- India produced approximately 4.73 million metric tonnes of organic products under NPOP during 2024–25, with certified organic farms contributing nearly 93 percent of total production.
- Madhya Pradesh, Maharashtra, Rajasthan, and Gujarat emerged as the leading states in terms of certified organic area and production, whereas Haryana's organic cultivation area remained relatively limited.
- The certified wild harvest area was almost equal to the certified cultivated organic area, demonstrating the significant role of forest-based resources and biodiversity in India's organic sector.
- India exported 368,155 MT of organic products worth US$ 665.97 million during 2024–25, reflecting strong international demand for certified organic products.
- The United States and European Union together accounted for more than 80 percent of India's organic export earnings, making them the most important export destinations.
- **Haryana emerged as the leading exporting state** during 2024–25 with export earnings of US$ 104.56 million, despite having a comparatively small organic cultivation area, indicating the importance of processing infrastructure and export-oriented enterprises.
- India had 1,016 certified organic processing units**,** with Karnataka, Gujarat, and Maharashtra leading the country. Haryana ranked among the top ten states with 43 certified processing units.
- The domestic organic market was estimated at approximately ₹16,800 crore in fiscal 2023 and is projected to grow at a CAGR of 13–15 percent until 2033.

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- Organic pulses and cereals dominated the domestic market, while processed foods, dairy products, fruits and vegetables are expected to be the fastest-growing segments in the coming decade.
- Consumer survey findings indicated strong future demand, with nearly 80 percent of consumers willing to increase their spending on organic products, although concerns regarding price, certification awareness, and product authenticity continue to exist.
- The rapid growth of e-commerce and online grocery platforms has transformed organic product distribution, increasing accessibility and market reach across urban India.

According to NCONF, Ministry of Agriculture and Farmers Welfare (2026), India rank second in world organic agricultural land. Sikkim became world's 1st fully organic state and north east India has traditionally practiced organic farming with lower chemical use. India has the largest number of organic producers in the world, with 2.3 million farmers. A major strength identified is India's diverse agro-climatic conditions, rich biodiversity and internationally recognized organic certification system, which facilitated both domestic market expansion and export competitiveness. The country had also established organic recognition agreements with several international markets, by enhancing the acceptance of Indian organic products worldwide. Furthermore, the growing participation of farmer groups, increasing processing infrastructure and expanding market channels provide a strong institutional and commercial base for future growth.

From an export perspective, India continued in maintaining strong presence in international organic markets, particularly in the United States and the European Union. Although export performance has experienced fluctuations in recent years, the increasing diversification of export destinations and product categories highlights the resilience and future potential of the sector. More importantly Haryana presents an interesting state among all where, despite having relatively small organic cultivation area, it has emerged as a leading exporter of organic products due to its strong processing capacity, export infrastructure and market linkages.

Overall, the findings suggested that purchasing organic products, meaning that paying for genuine cost of food production, organic food sector in India is transitioning from a niche agricultural practice to a rapidly expanding component of sustainable agriculture and agribusiness. Continued policy support, farmer and consumer awareness, certification facilitation, infrastructure development, consumer education and market expansion initiatives will be essential for realizing the full potential of organic food products in India and strengthening the country's position in the global organic marketplace.

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