

BIO PLUS AG

marketing natürlich!



Trends in Organic Retailing 2008

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Outline

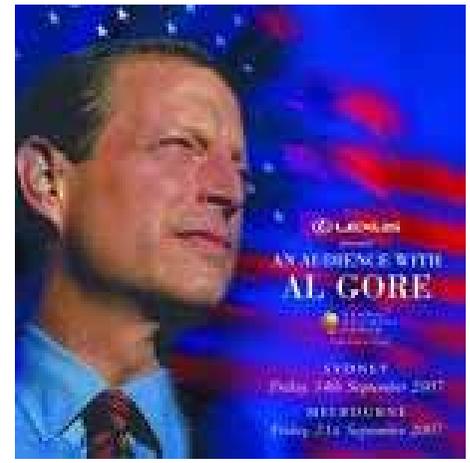


Retailing organic food 2008 >> Status quo

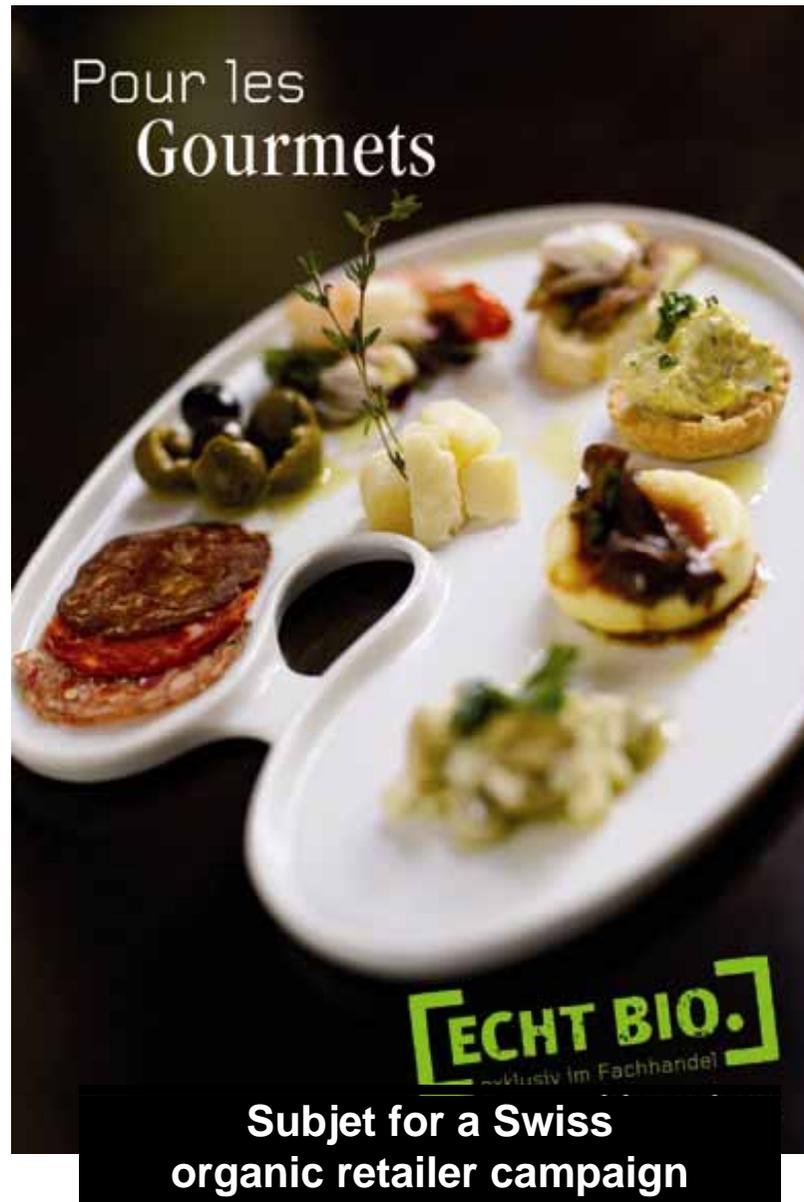
- Organic national markets in Europe developed in a different way
- Growth in organic sales slowed down (but not in all countries)
- Consolidation by saturation
- Growth mainly by new sales area // competition between organic players more intensive
- Market development and penetration reached an advanced phase in Western Europe
- In Eastern Europe in most countries already phase of emerging markets

Retailing organic food 2008 >> Trends





Organic promotion campaigns focus LOHAS



Organic product development does focus LOHAS



Organic product development does focus LOHAS



Retailers/producer markets focus LOHAS



Retailers/producer markets focus LOHAS



Retailers focus LOHAS



Organic 2.0 communities influence the buying decision

- Internet communities, neutral product test organisations make organic supply and producers transparent globally
- They are able to influence buying decisions stronger than advertising campaigns
- Negative organic cases get identified faster



Organic 2.0 communities influence the buying decision

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Such >>



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Zum 4.02.08 +++ **Neues Konzept:** Deutschland legt **Gegenentwurf zum EU-Energiekonzept** vor +++ Die ISPO ist eröffnet. Neu in diesem Jahr ist der **EcoDesign-Award** +++ Unser Gründungspartner HESS NATUR hat den **Public-Eye-Award** für vorbildliche Mehr in den

Communities recommend each other which products to buy/blame

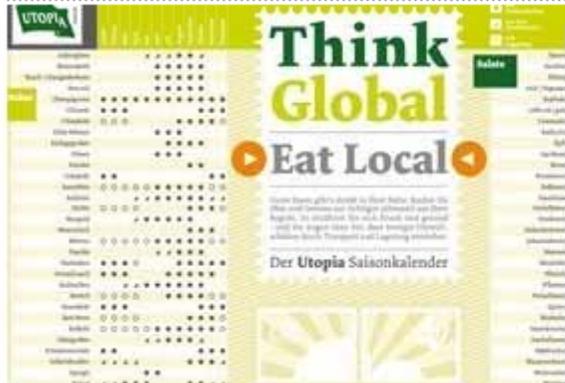
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Zum Ausdrucken und Aufhängen



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Neue Utopisten



Internet

Organic 2.0 communities influence the buying decision

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Communities recommend each other which products to buy/blame

Internet

Organic sector with conventional trends



- Conventional retailers gain market shares in the organic market
- Organic processing industry loves to use certain conventional practices
- Number of highly processed organic food increases
- More energy, transport miles and package material for organic food used
- Global organic sourcing and selling
- Increasing concentration of organic processing, wholesaling and retailing
- Seasonal aspects lose relative importance as organic marketing issue
- 'Global Organic' get competition by 'Local Conventional'
- Missing partnership between organic farmers and their conv. market partners (conv. supermarkets and discounters)
- Consequence: Organic becomes more anonymous and exchangeable

Prospects: Organic on sale?



Prospects: Organic Market consolidation



- Yes, there is an economic crisis.
- But, countries, sectors and also consumer groups are affected differently.
- Typical organic heavy buyers (teachers, public servants, students, higher income groups) are less affected.
- Growth in organic sales will slow down or consolidate (0-5% growth), but not crash.
- Organic Food decision in many cases is made by attitude, there are other fields to safe money.

Conclusions

- ☆ The share of sold organic food via conventional chains is permanently growing.
- ☆ Discussion: 'Is there already a mechanism of conventionalism in the organic market/sector?'
- ☆ Answer: 'Yes it is. It is a consequence to bring organic out of the niche. But it opens new niches for ethical and quality players.'
- ☆ The economic crisis will slow down the dynamic of organic market development.
- ☆ However it is a chance to look for sustainability and real partnership and within the organic supply chains.
- ☆ It is a chance to promote values rather than to discount organic food.