The Global Market for
Organic Food & Drink

by

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Company History

2001  Company formation
2001  Launch market research reports
2002  Broaden focus to related industries
2003  Geographical coverage widens
2006  Expand business services portfolio
2007  Launch industry summits

www.organicmonitor.com
Global Market

- Market Size (2008): US $50.9 billion
- Leading Regions: Europe, North America
- Leading Markets: USA, Germany, UK, France
Market Growth Rates

Revenues (US$ billion)

- 1999: 15.2
- 2002: 23.0
- 2005: 33.2
- 2008: 50.9

Organic Monitor
Europe

Market Size
US $26 billion

Largest Market
Germany

Latest Developments
Oversupply
Price Sensitivity
Declining Prices

Organic Monitor
North America

Market Size
US $23 billion

Largest Market
United States

Trends
Private Labels
Consolidation
Declining Prices
Asia

Market Size: US $0.95 billion

Largest Market: Japan

Trends:
- Growing Interest
- High Price Sensitivity
- Demand Concentration
Growth Outlook

Global economy projected to expand by 3.9% in 2010 (IMF)

1. Market growth rates recover
2. Overproduction
3. Product prices stabilise
4. Industry consolidation
5. Consumers becoming increasingly sophisticated…
Growing Consumer Sophistication

- Growing concern about the environment
- Rising demand for chemically-clean products
- Growing scrutiny of product origins
- Increasing regionalism / buy local
- Questions about carbon footprint of products

Impact: Companies need to respond to rising consumer expectations
Companies need to go beyond ‘organic’ as consumers become more sophisticated and market matures.

What sustainable values?
Organic Plus Strategies

Products marketed on sustainable values…
Standards Evolution

Organic standards are responding to market changes by encompassing sustainable values…
Thank You

More Information
Newsletter: Sign up on www.organicmonitor.com
Sustainable Foods Summit (June 10-11, Amsterdam)
www.sustainablefoodssummit.com