



# **A glimpse on organic markets** **in Eastern Europe**

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# Organic markets in Eastern Europe



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## SEE- Western Balkan Countries

Croatia

Serbia

Slovenia

Macedonia (FYRM)

Bosnia and Herzegovina (BiH)

Montenegro



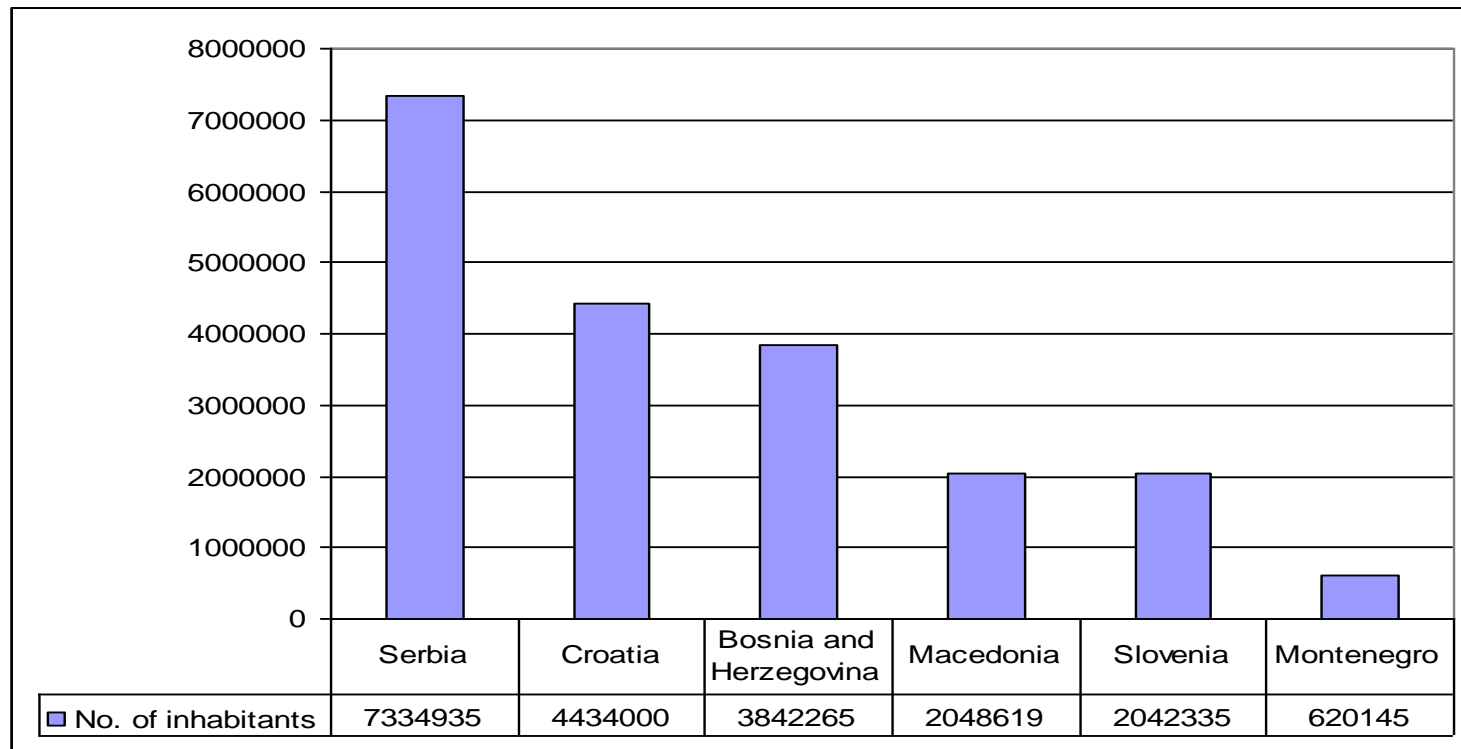
**FOCUS - BALKANS**

# Key figures SEE

**Total population: 20 million**

**Average expenditures for organic food: from 1 to 17 €/ capita**

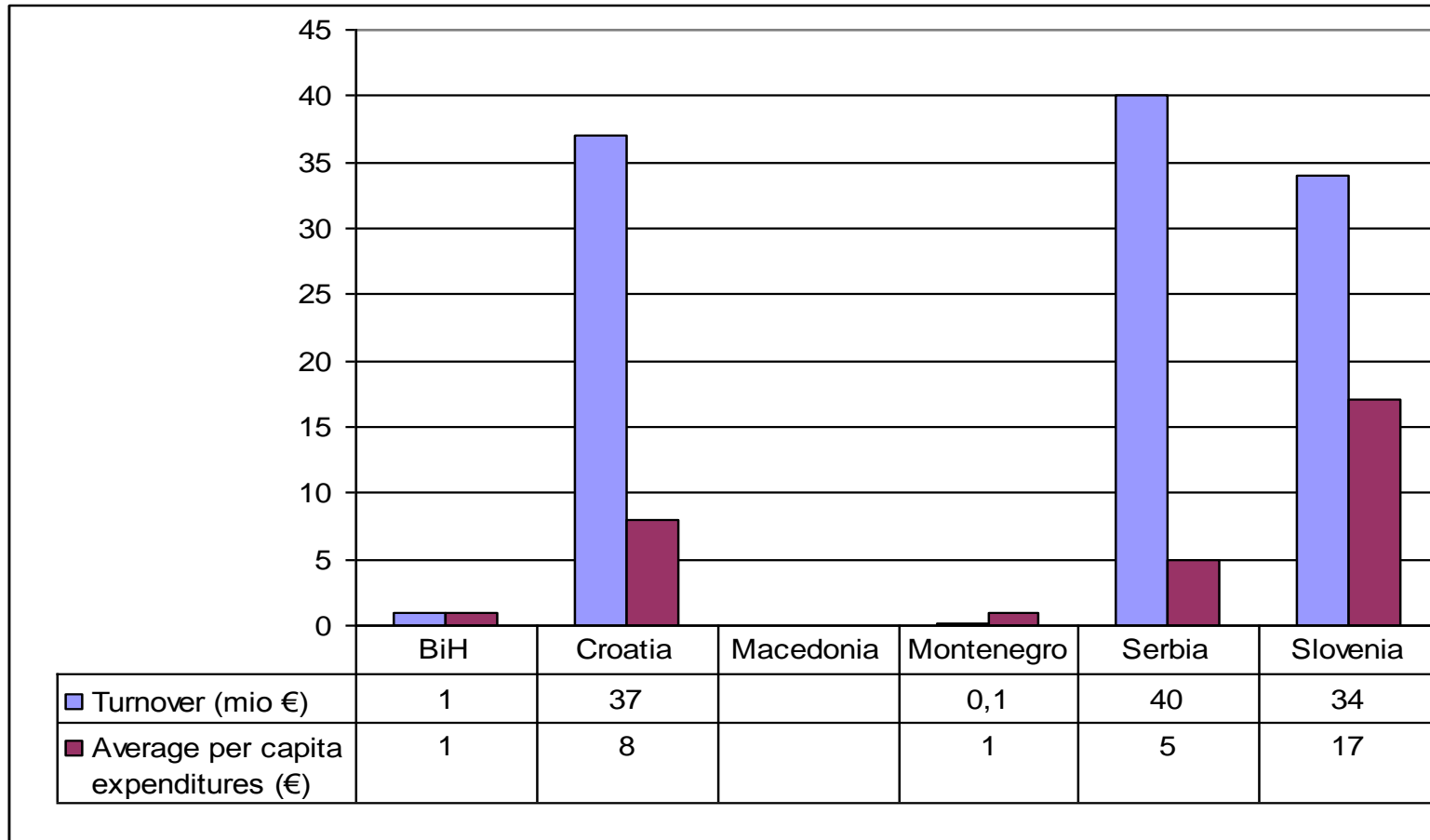
**Estimated organic market size: 120 million €**



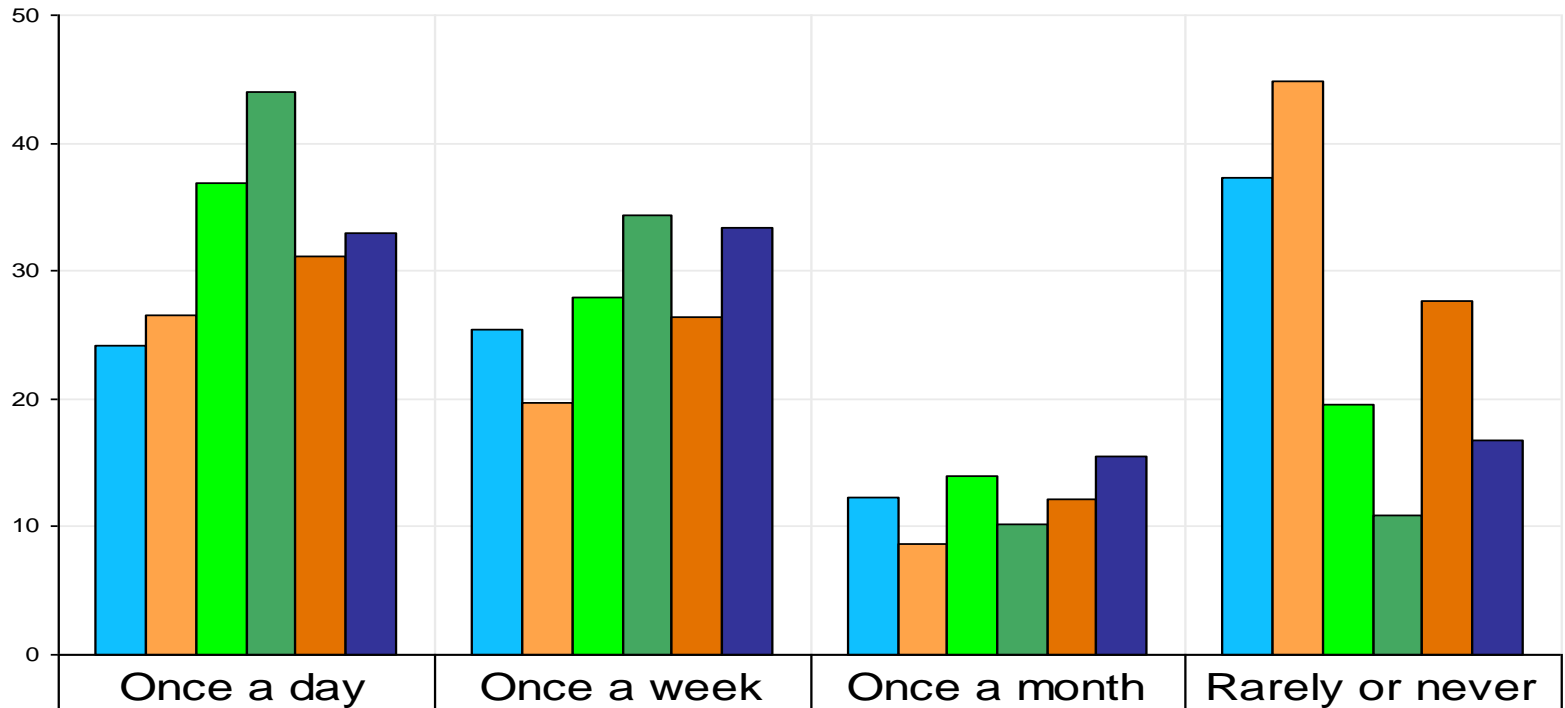
# Key figures SEE







Important variations of market size

Market share is beneath the 1% - mark



# Consumer survey: frequency of purchase



 Serbia	24,1	25,4	12,3	37,3
 Macedonia	26,5	19,7	8,7	44,8
 Montenegro	36,9	28	14	19,5
 BIH	44	34,3	10,2	10,9
 Croatia	31,1	26,4	12,2	27,7
 Slovenia	32,9	33,4	15,5	16,7

# **Market characteristics SEE**

**Growing surfaces for organic agriculture and wild collection**

**Production is much higher than consumption**

**Export of unprocessed items**

**Import of processed items**

**Market drivers:**

**specialized retailers (Croatia)**

**conventional retail**

**export oriented companies**

**Market trends:**

**slower growth due to financial crisis impact**

**sound growth basis thanks to specialized retail.**

# Organic markets in Eastern Europe

**CEE**

**Bulgaria**  
**Czech Republic**  
**Estonia**  
**Hungary**  
**Poland**  
**Romania**  
**Slovakia**

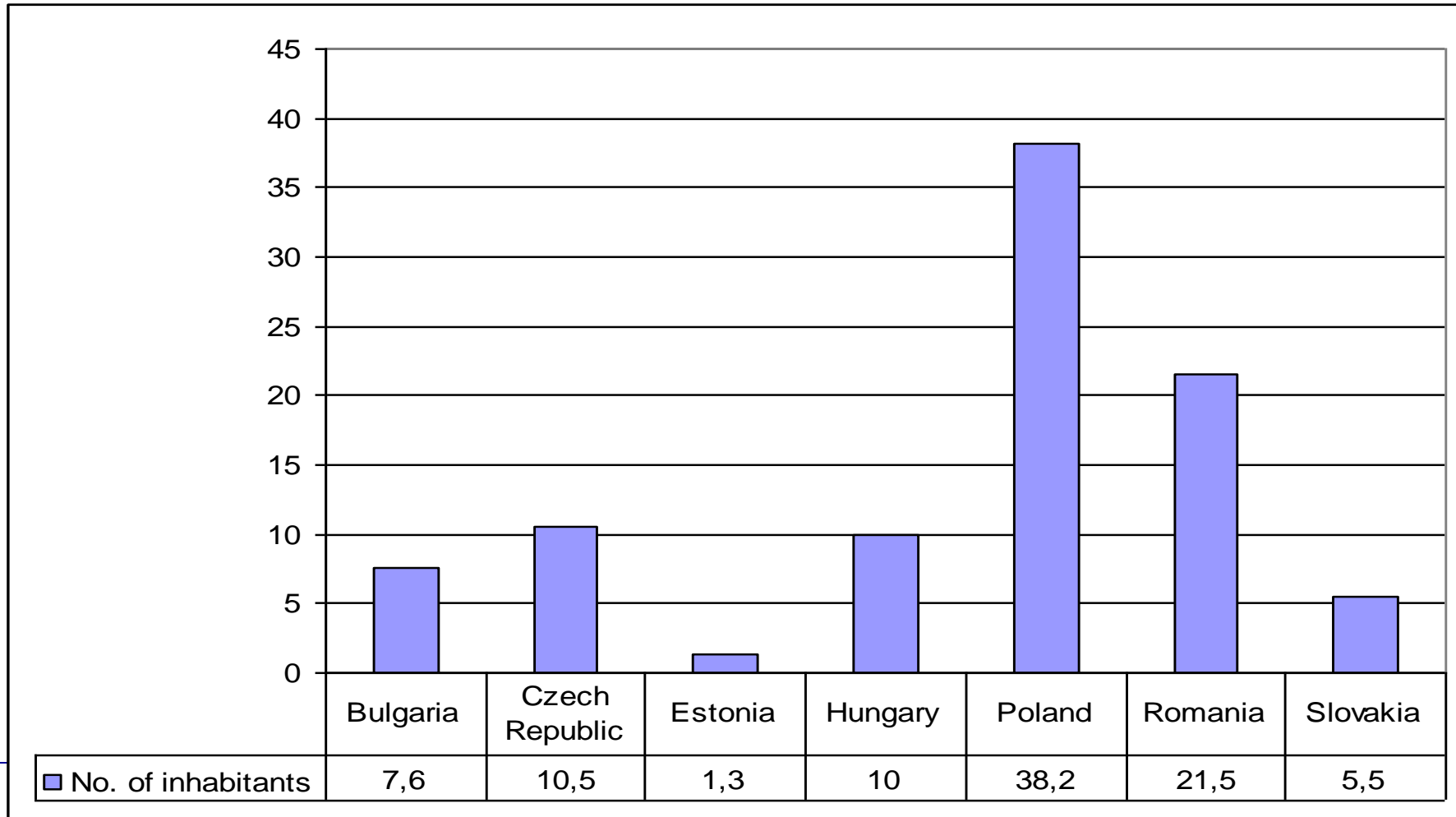




# Key figures CEE

**Total population: 95 million**

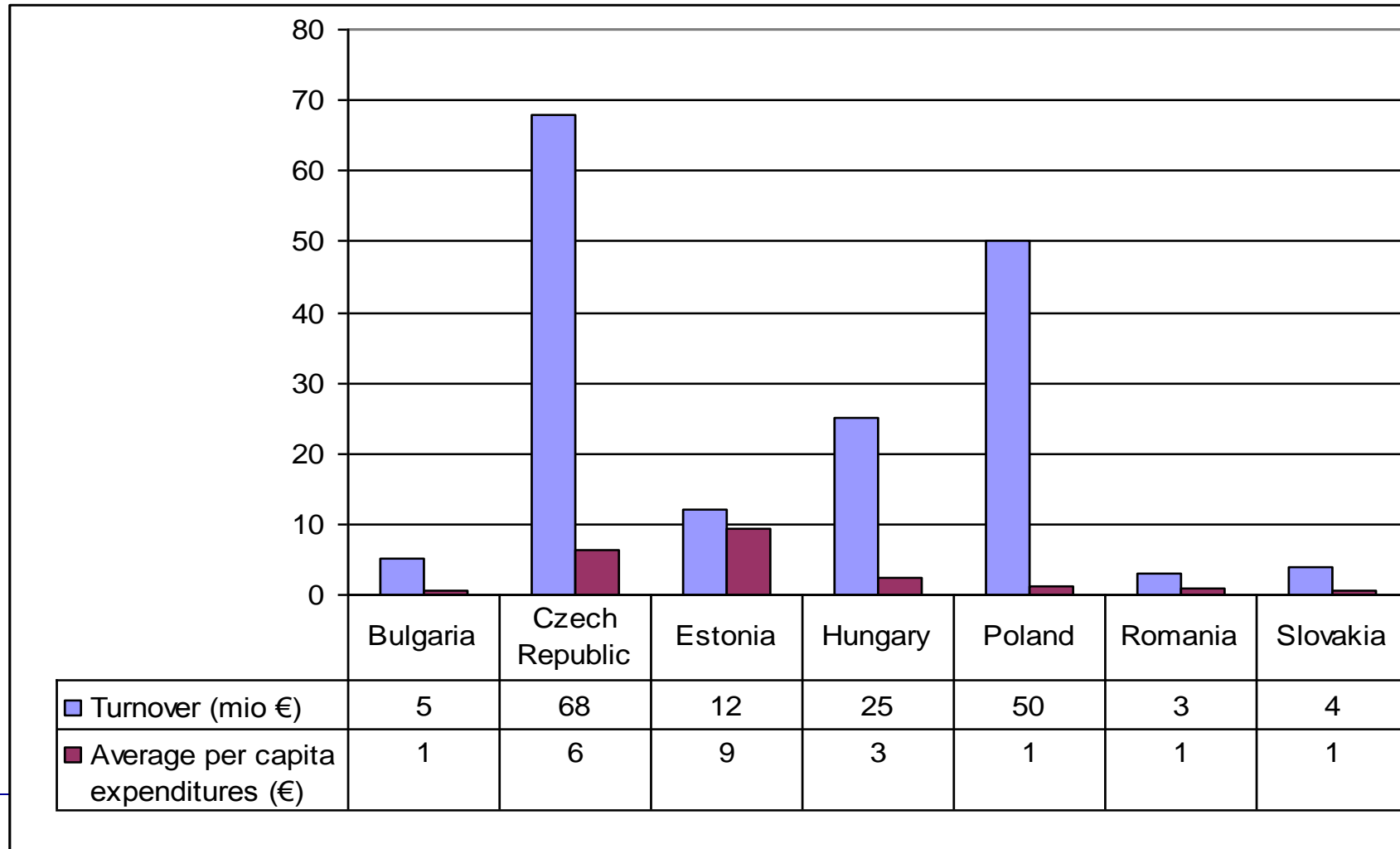
**Estimated organic market size: 170 million €**



# Key figures CEE

Important variations of market size and per capita consumption

Market share is beneath the 1% - mark



# Market characteristics CEE

**Growing surfaces for organic agriculture and wild collection**

**A lot of local production for micro-supply chains**

**Difficulties in building up domestic supply chain**

**Market drivers:**

**(specialized retail)**

**conventional retail (Hungary)**

**Market trends:**

**slower growth due to financial crisis impact**

# Market characteristics CEE & SEE

**Young markets (?)**

**Patch work markets**

**The consumer group of “LOHAS” is present**

**Committed and professional actors push the markets,  
across borders**

## Sources:

**Focus Balkans** [www.focus-balkans.org](http://www.focus-balkans.org)

**Annemarija Slabe**

**Blagica Sekovska**

**Bernard Jansen (Ekoconnect)**

**Tom Vaclavik (Greenmarketing)**