The organic market in Germany - highlights 2016

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Highlights of the German Organic market

- Intensive activities of different supermarket chains (especially full range suppliers like Edeka and Rewe) for getting more different organic items in the supermarket shelves
- Natural food stores face bigger competition from the supermarkets – growth has slowed down
- Higher consumer prices for many products – contrary to conventional products (stable level)
- Sourcing of raw material remains the biggest issue for organic suppliers
  - Small harvests for many crops
  - Unsufficient supply for milk and eggs, better supply for pork and beef
- Conversion to organic increased significantly
- Imports have been rising but import rates fluctuate
- **MARKET GREW by nearly 10 % in 2016 up to 9.48 billion EUR – 5.0 – 5.1% of the entire food market**
Organic food sales in Germany
In billion EUR excl. Catering

Supermarkets
Incl. Drug stores

Natural food stores
Incl. Big farm shops

Other sales channels
Bakeries, butchers, fruit & vegetable shops, farmer’s markets, small farm shops, Online shops, health food shops, petrol stations

Total

<table>
<thead>
<tr>
<th>Year</th>
<th>Supermarkets</th>
<th>Natural food stores</th>
<th>Other sales channels</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>3.79</td>
<td>2.14</td>
<td>1.05</td>
<td>6.97</td>
</tr>
<tr>
<td>2013</td>
<td>4.06</td>
<td>2.26</td>
<td>1.10</td>
<td>7.42</td>
</tr>
<tr>
<td>2014</td>
<td>4.21</td>
<td>2.47</td>
<td>1.09</td>
<td>7.76</td>
</tr>
<tr>
<td>2015</td>
<td>4.76</td>
<td>2.71</td>
<td>1.15</td>
<td>8.62</td>
</tr>
<tr>
<td>2016</td>
<td></td>
<td></td>
<td></td>
<td>9.48</td>
</tr>
</tbody>
</table>

Source: Arbeitskreis Biomarkt

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Organic shares are rising

Organic share of the total food market in Germany, in %

2010: 3.74%
2011: 4.10%
2012: 4.20%
2013: 4.32%
2014: 4.43%
2015: 4.78%
2016*: 5.0 to 5.1%

* Estimation depending on the development of the total food market 2016

Source: AMI based on Arbeitskreis Biomarkt and Statistical Office

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Tops and Flops 2016

Growth rates of sales volumes and sales values of household purchases in Germany, 2016 vs. 2015 in %

### Sales volumes
- Vegetable oils: 27.5%
- Poultry: 21.9%
- Potatoes: 16.9%
- Fruit: 11.6%
- Vegetables: 11.1%
- Drinking milk: 9.8%
- Meat: 8.8%
- Eggs: 7.8%
- Bread: 6.7%
- Meat products: 6.4%
- Cheese: 5.1%
- Butter: 2.4%

### Sales values
- Vegetable oils: 17.8%
- Drinking milk: 12.2%
- Meat: 4.9%
- Cheese: 5.7%
- Bread: 8.0%
- Drinking milk: 8.8%
- Meat: 4.5%
- Eggs: 3.6%
- Meat products: 4.2%
- Cheese: 4.8%
- Bread: 5.2%
- Butter: 4.1%

Source: AMI-analysis based on GfK household panel
Consumer prices were rising

Consumer prices for organic fresh products, growth rate 2016 vs 2015, in %

<table>
<thead>
<tr>
<th>fresh products*</th>
<th>4,0</th>
</tr>
</thead>
<tbody>
<tr>
<td>potatoes</td>
<td>9,6</td>
</tr>
<tr>
<td>eggs</td>
<td>8,6</td>
</tr>
<tr>
<td>vegetable oils</td>
<td>7,7</td>
</tr>
<tr>
<td>fruit</td>
<td>6,6</td>
</tr>
<tr>
<td>meat products</td>
<td>6,1</td>
</tr>
<tr>
<td>poultry</td>
<td>4,5</td>
</tr>
<tr>
<td>vegetables</td>
<td>3,6</td>
</tr>
<tr>
<td>bread &amp; bakery</td>
<td>3,3</td>
</tr>
<tr>
<td>beef</td>
<td>1,0</td>
</tr>
<tr>
<td>milk &amp; dairy</td>
<td>0,6</td>
</tr>
<tr>
<td>cheese</td>
<td>0,4</td>
</tr>
<tr>
<td>pork</td>
<td>0,3</td>
</tr>
</tbody>
</table>

*Sum of all mentioned organic products

Source: AMI-Verbraucherpreisspiegel
Organic shares of household purchases of fresh products in Germany 2016, volume shares in %

- Eggs: 11.7%
- Fresh vegetables: 6.8%
- Drinking milk: 6.8%
- Vegetable oils: 6.3%
- Fresh fruit: 6.0%
- Yoghurt: 5.5%
- Potatoes: 5.5%
- Bread: 4.1%
- Cream cheese: 3.4%
- Butter: 3.0%
- Cheese: 2.3%
- Meat: 1.8%
- Milk drinks: 1.6%
- Poultry: 1.4%
- Meat products: 1.3%
- Margarine: 0.6%

Source: AMI-Analysis based on GfK household panel
Organic Area and growth rate

Organic Agricultural Area in Germany in 1,000 ha and growth rate compared to previous year in %

Import shares have been rising
Import shares of selected organic products, in business years %

soy beans (incl…: 94
field peas: 61
grain maize: 46
carrots: 46
butter: 42
drinking milk: 37
wheat: 34
apples: 31
pork: 26
potatoes: 24
yoghurt: 24
cereals total: 24

Source: AMI
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Absatz- und Umsatzänderung von Bio-Frischeprodukten* nach Einkaufsstätten in %, 2016 gegenüber 2015

Absatzänderung:
- Gesamt: 9,2%
- Discounter: 11,9%
- Vollsortimenter: 14,5%
- Naturkosthandel: 7,7%
- Sonst. Einkaufsstätten: 1,9%

Umsatzänderung:
- Gesamt: 6,9%
- Discounter: 3,9%
- Vollsortimenter: 12,7%
- Naturkosthandel: 8,4%
- Sonst. Einkaufsstätten: 1,5%

*Fleisch, Fleischwaren, Geflügel, Eier, Obst, Gemüse, Kartoffeln, Käse, Brot, Backwaren, Milch, Joghurt, Sojadrinks, Mehl, Milchgetränke, Quark, Butter, Speiseöl u.a.
Bio-Fläche hinkt Nachfrage hinterher

Entwicklung des deutschen Öko-Marktes, 2008=Index 100

Verkaufserlöse
Öko-Landwirte

Verbraucherausgaben
Öko insgesamt

Öko-Anbauflächen
Deutschland

Quelle: AMI auf Basis von BLE und Arbeitskreis Biomarkt