

Organic Monitor

**The Global Market for
Organic Food & Drink**

by

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Company Background

- UK-based business research firm, established in 2001
- International analysts / consultants
- Largest publisher of market research reports
- Range of business consulting services
- Global contacts & information database

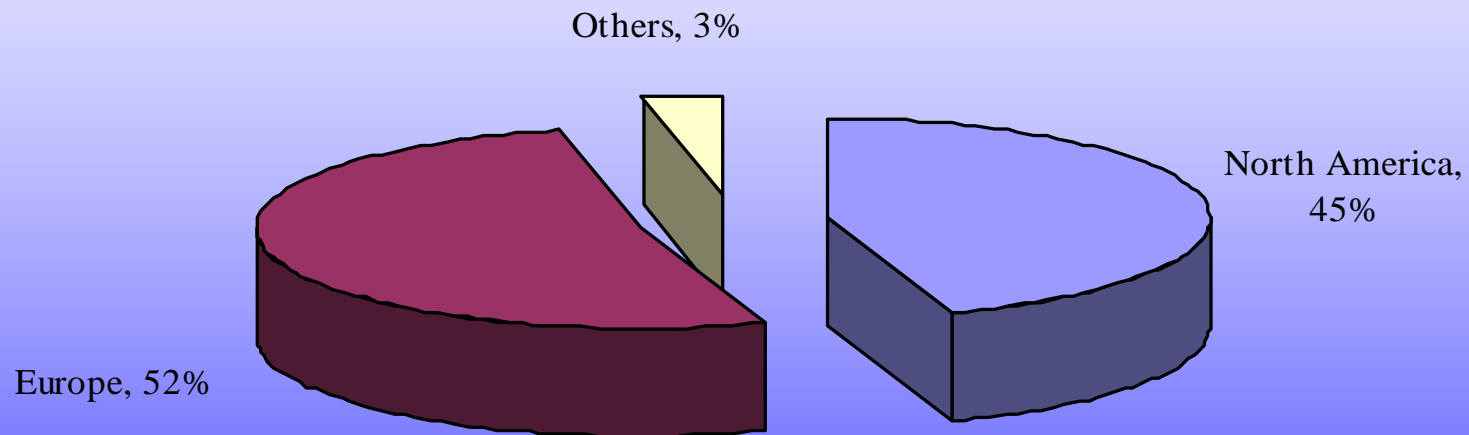
More information.... www.organicmonitor.com

Global Market



- ▶ Market Size (2005) US \$33 billion
- ▶ Market Growth 16% (YOY)
43% (2002)
- ▶ Leading Regions Europe (52%)
North America (45%)
- ▶ Leading Markets USA, Germany
UK, France, Italy

Revenue Breakdown



Europe

Market Size

US \$17.2 billion

Market Growth

15%

Largest Market

Germany

Major Channels

Supermarkets

Developments

Mass distribution

Supply shortages

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North America

Market Size

US \$14.9 billion

Market Growth

16%

Largest Market

United States

Major Channels

Supermarkets

Trends

**Retail Penetration
Undersupply**

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Asia

Market Size

US \$750 million

Market Growth

10-15%

Largest Market

Japan

Major Channels

Specialist Retailers

Trends

Growing Investment

Rising Awareness



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Oceania

Market Size

US \$300 million

Market Growth

15%

Largest Market

Australia (82%)

Major Channels

Supermarkets

Trends

Less Export Focus

Retailer Interest



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Global Trends

- Production increasing globally but demand is concentrated
- Demand is outpacing organic food supply leading to shortages
- Increasing investment (state, private, int. bodies)
- Growing number of state and private organic standards

Future Outlook

1. Demand concentrated where consumers have purchasing power
2. Supply-demand imbalances to remain a feature
3. Differences to remain between producer and consumer countries
4. Standards becoming impediments to global trade of organic products

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Thank You

More Information

Report: Global Market for Organic Food & Drink

Services: Business Advise & Consulting

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