



The organic market in Germany - highlights 2018

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13.02.2019, BIOFACH, NÜRNBERG



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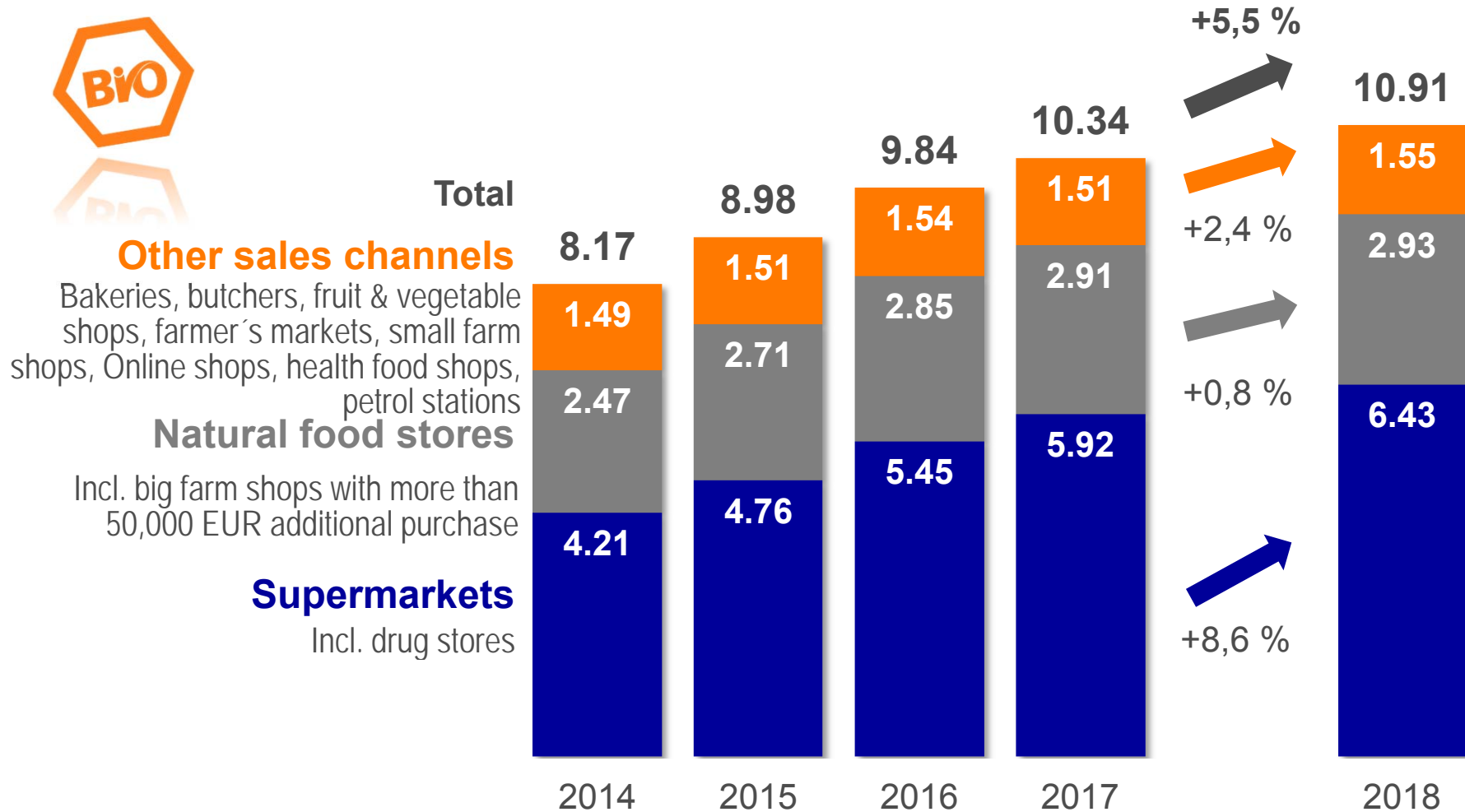
Highlights 2018



- Supermarkets and discounters have continued to expand their product ranges
- Natural food stores are facing this concurrence and have to find new marketing ways , growth rates have slowed down
- Slightly rising consumer prices for many organic products while conventional prices were increasing twice as high
- Dry products and dairy gained the most with larger quantities, higher prices were not really possible
- Cooperation between Bioland and Lidl resp. Demeter and Kaufland/real lets the whole industry think about strategies in purchasing and placements in the shops
- Conversion 2016/17 has improved the offer of milk, pig and eggs in 2018, temporality oversupply of porc
- Since 2017/18 more domestic cereals and forage, import rate decreased
- Organic area has been grown by approx. 8 %
- **Market grew by 5.5 % up to 10.91 billion EUR – approx. 5.3 % organic share**

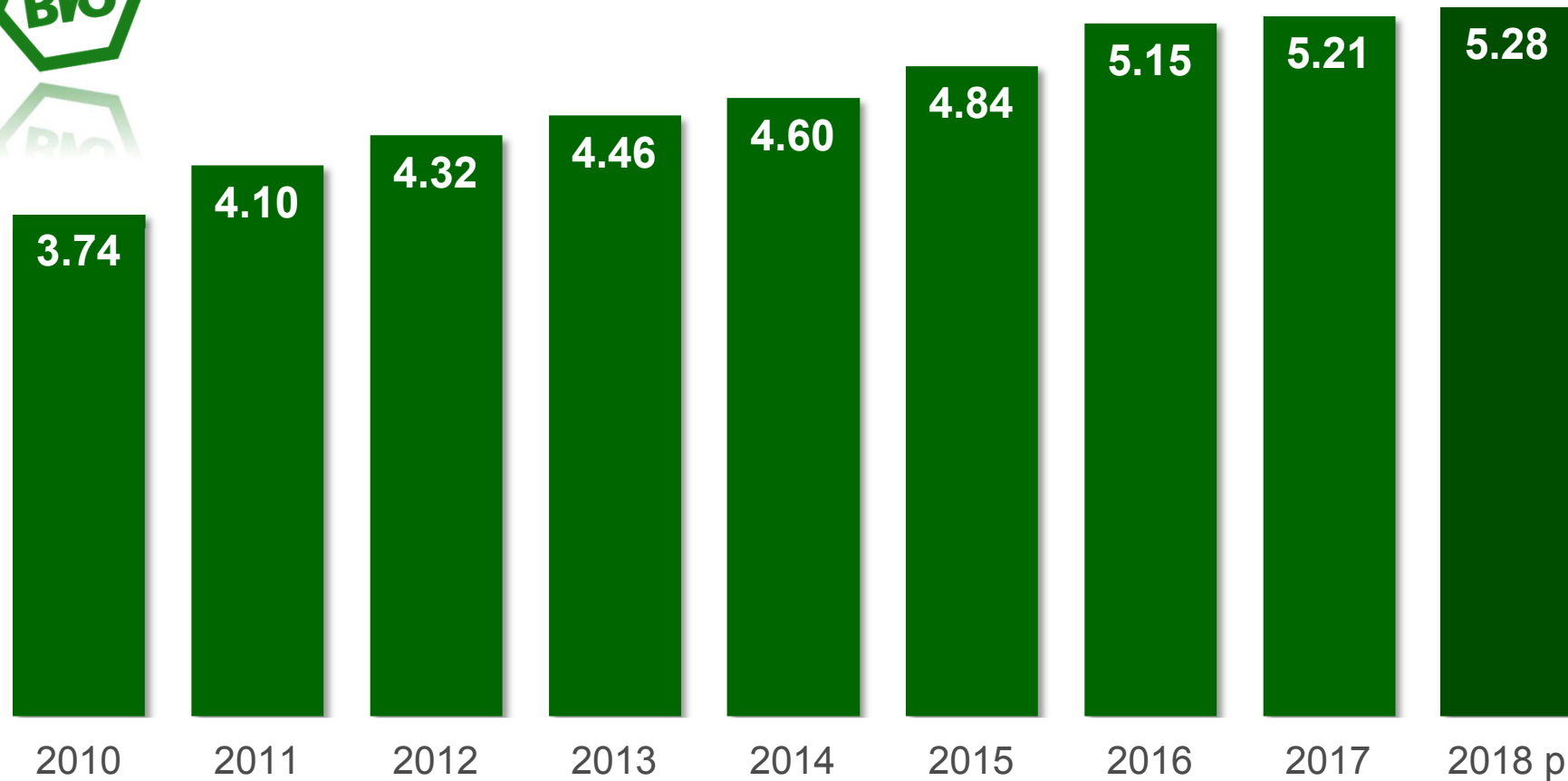
Organic food sales in Germany

In billion EUR excl. Catering



Organic shares are rising

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

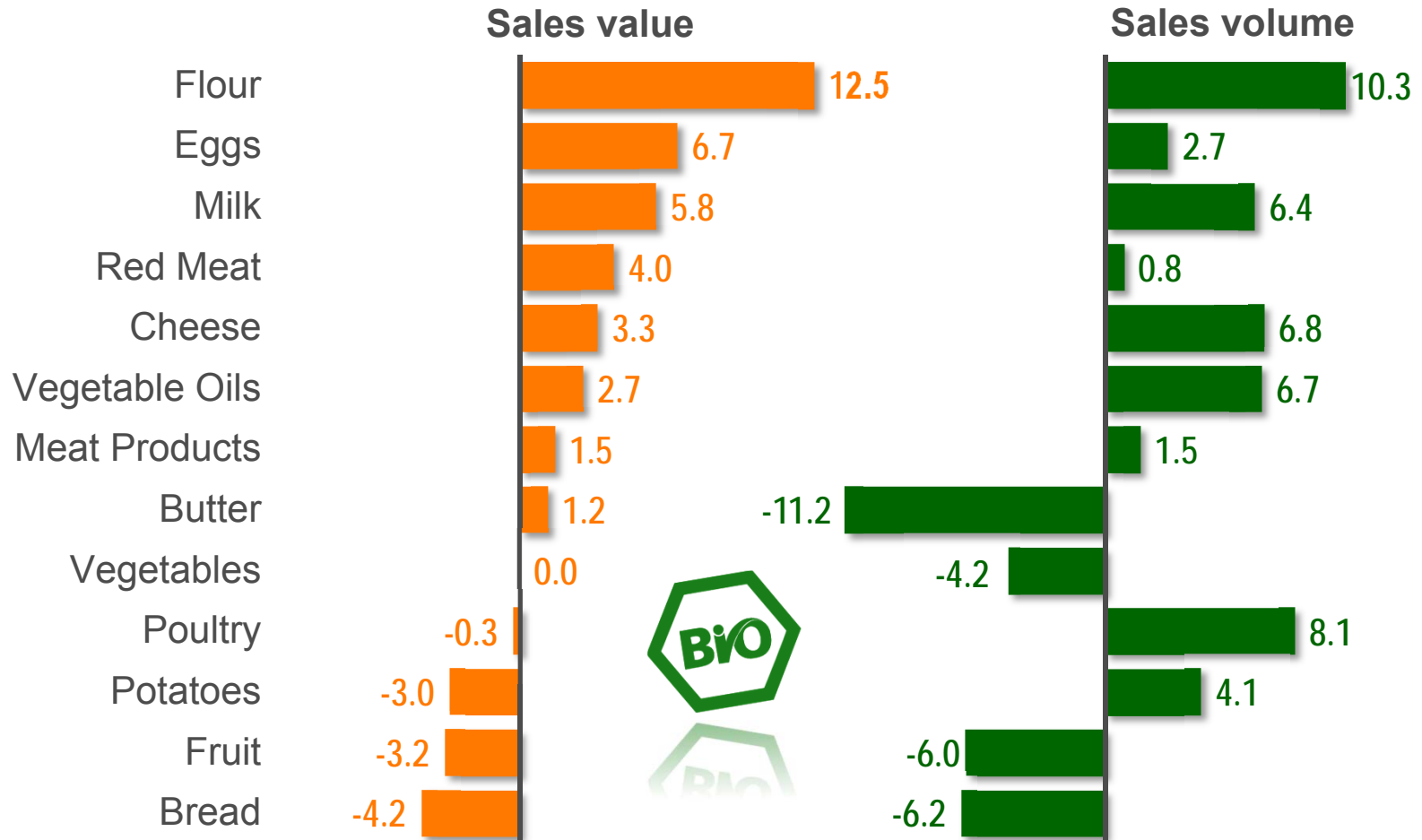


* Estimation depending on the development of the total food market 2018

Tops and Flops 2018



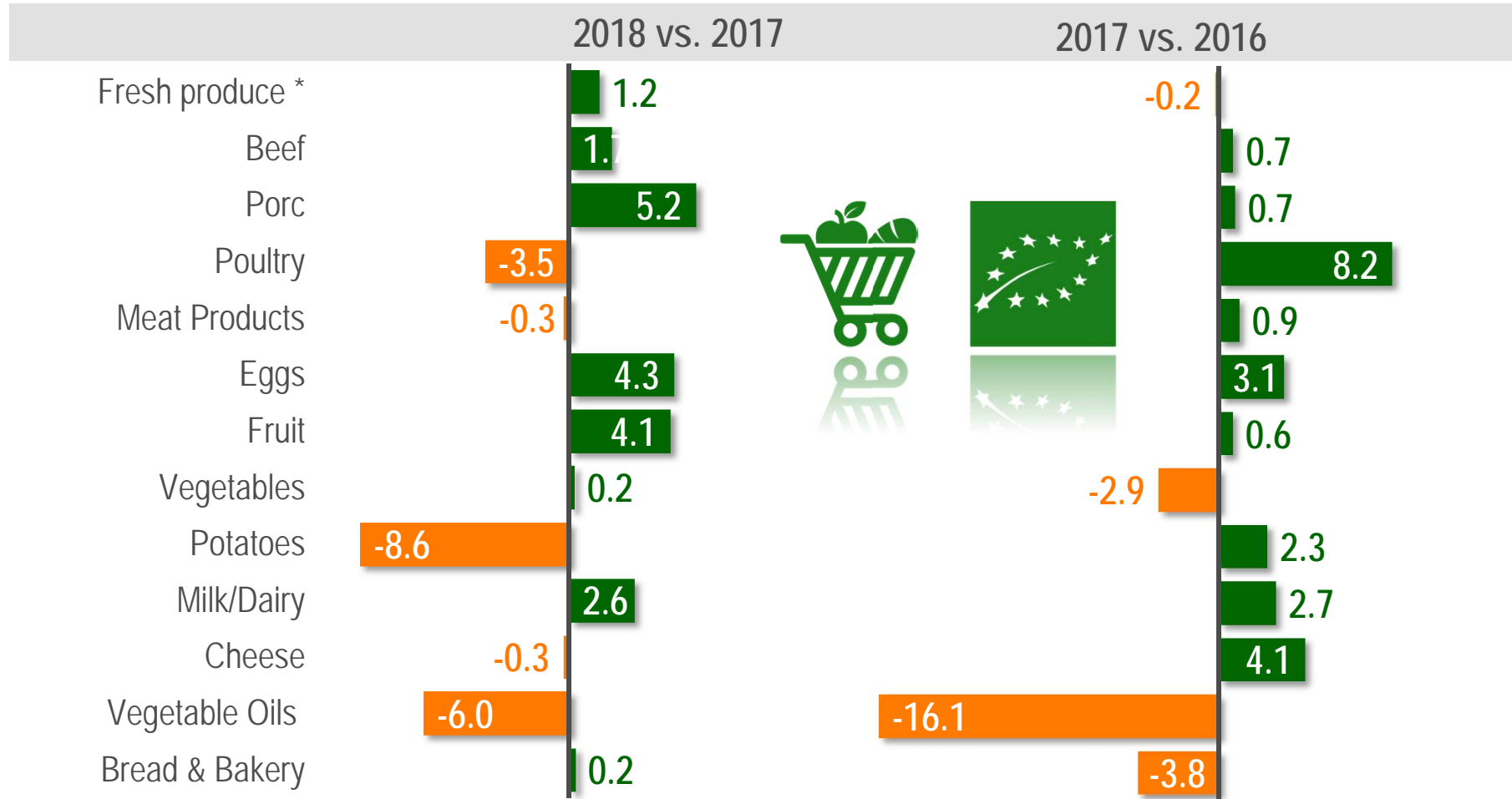
Growth rates of sales volumes and sales values of household purchases in Germany, 2018 vs. 2017 in %



Consumer prices slightly increased



Consumer prices for organic fresh products, growth rates, in %

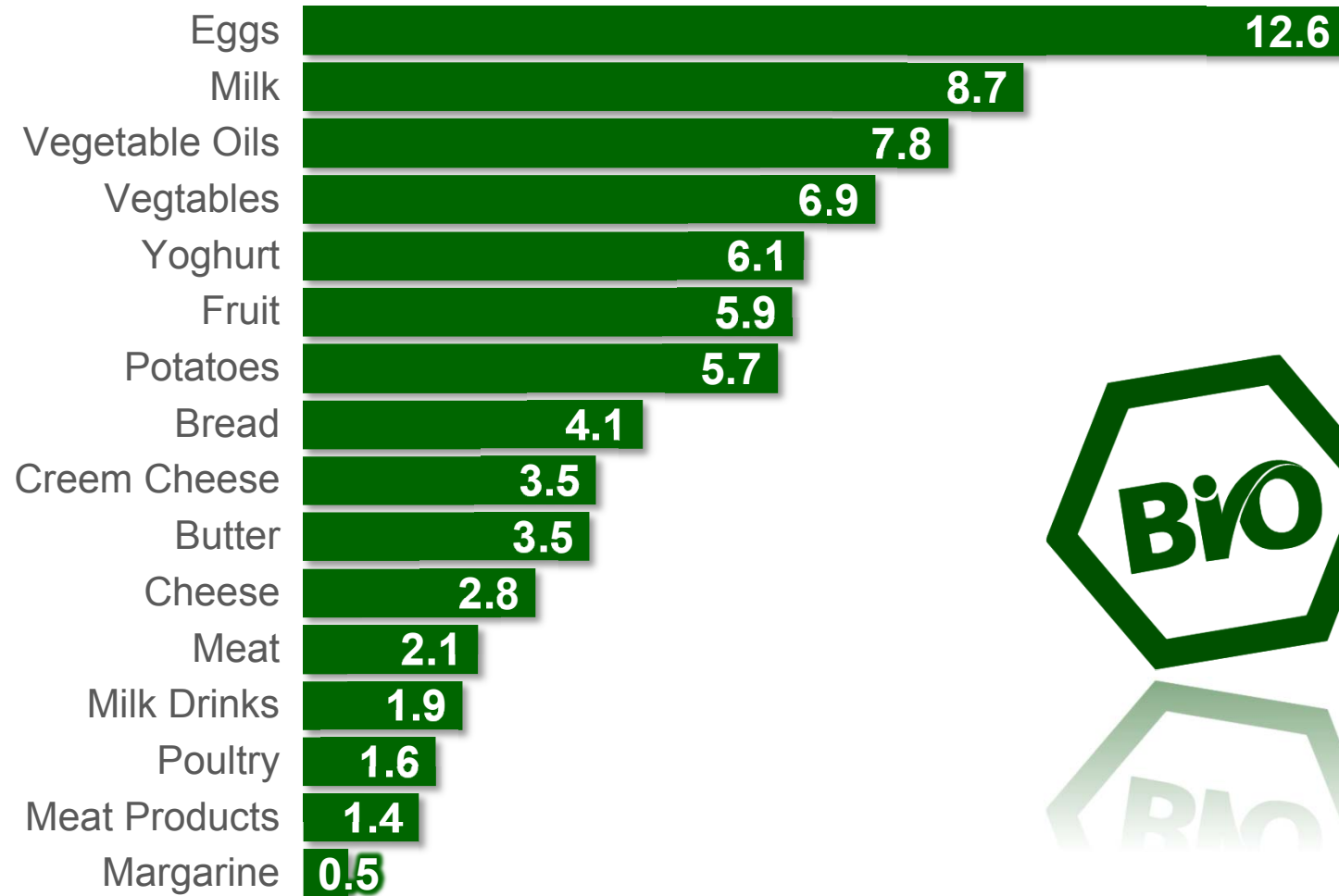


* Sum of all mentioned organic products

Organic shares of different products



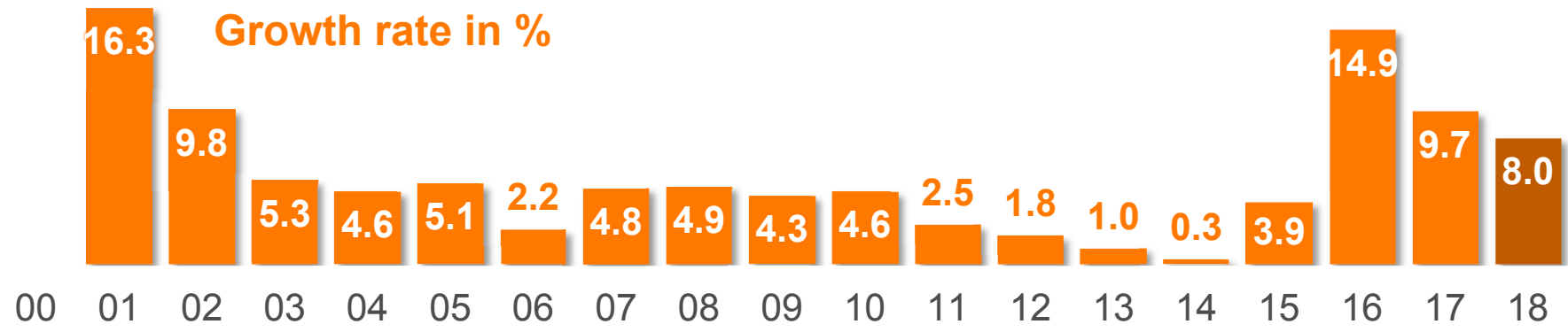
Organic shares of household purchases of fresh products in Germany
2016, volume shares in %



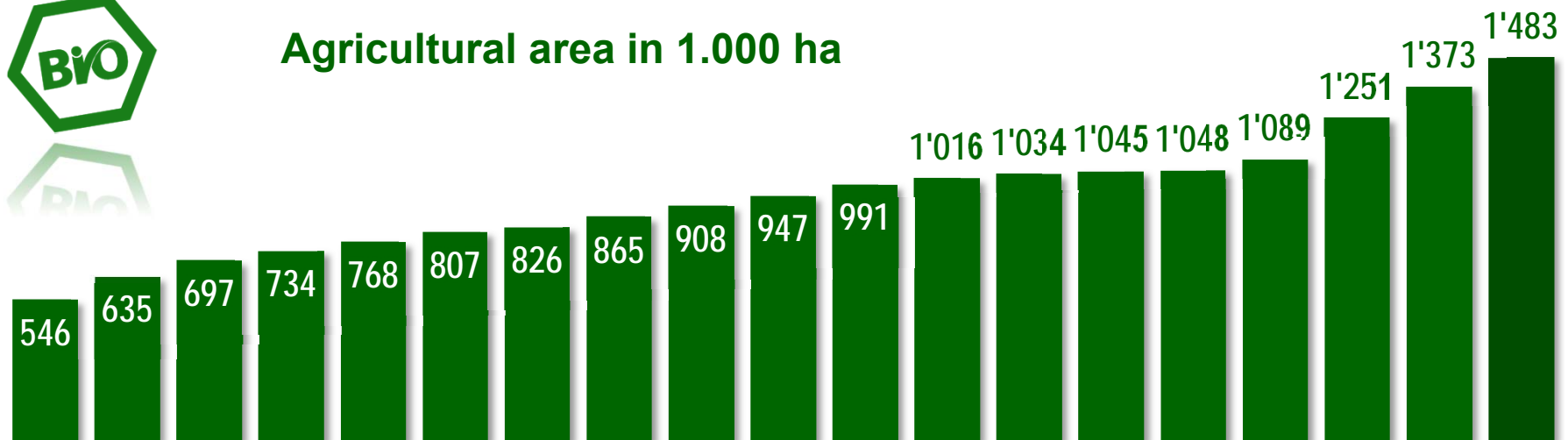
Organic Area and growth rate



Organic Agricultural Area in Germany in 1.000 ha and growth rate compared to previous year in %



Agricultural area in 1.000 ha



2018 preliminary

Since 2015 More Arable Land

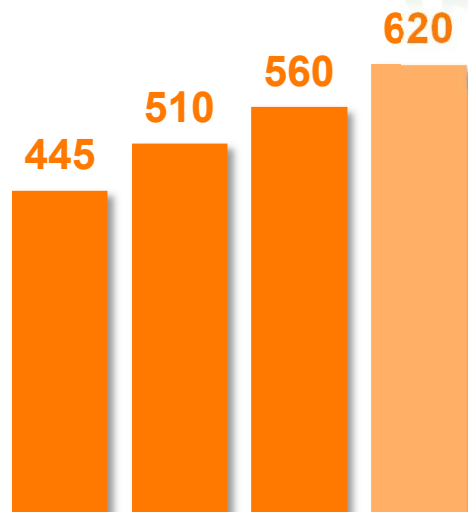


Organic Production and Growth Rate in Germany 2015 - 2018, in %

Organic Arable Land

in 1.000 ha

+ 39



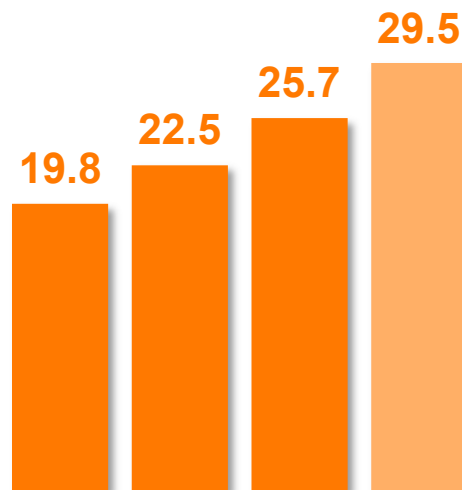
2015 2016 2017 2018*

* 2018 AMI-Estimation

Organic Porc

in 1.000 t carcass weight

+ 49

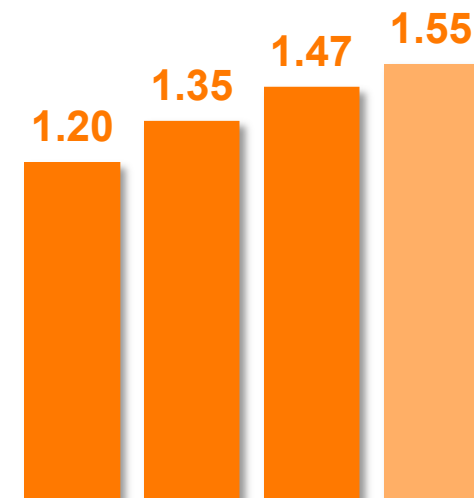


2015 2016 2017 2018*

Organic Eggs

in billion pieces

+ 29



2015 2016 2017 2018*

Organic Milk production grows most

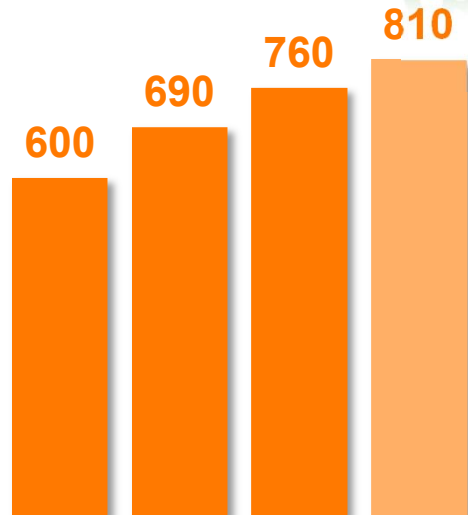


Organic Production and Growth Rate in Germany 2015 - 2018, in %

Organic Grassland

in 1.000 ha

+ 35



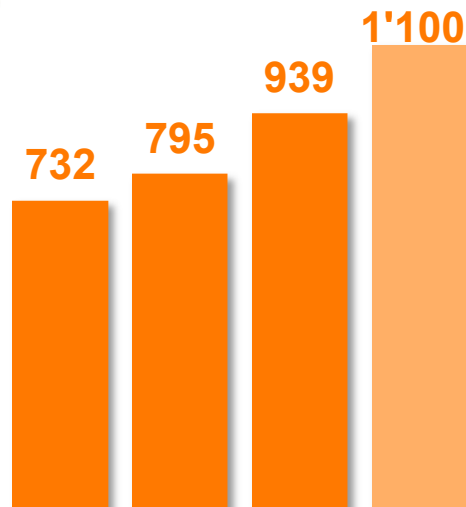
2015 2016 2017 2018*

* 2018 AMI-estimation

Organic Milk

in million kg

+ 48

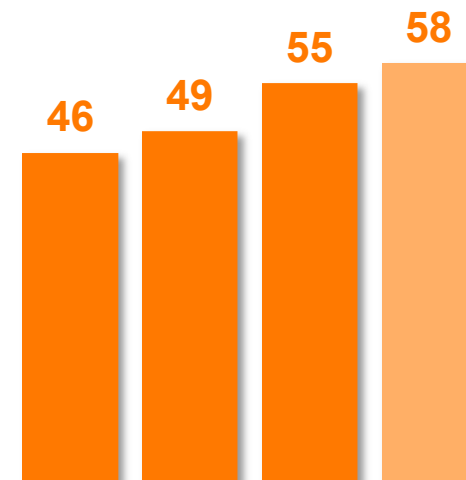


2015 2016 2017 2018*

Organic beef

in 1.000 t carcass weight

+ 27



2015 2016 2017 2018*

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