



Organic market in Germany 2014

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Development of the German Organic market 2014



- Ongoing media attention to animal welfare issues in conventional and organic farms
- Ongoing vegan/vegetarian boom
- Price decreases for many conventional products

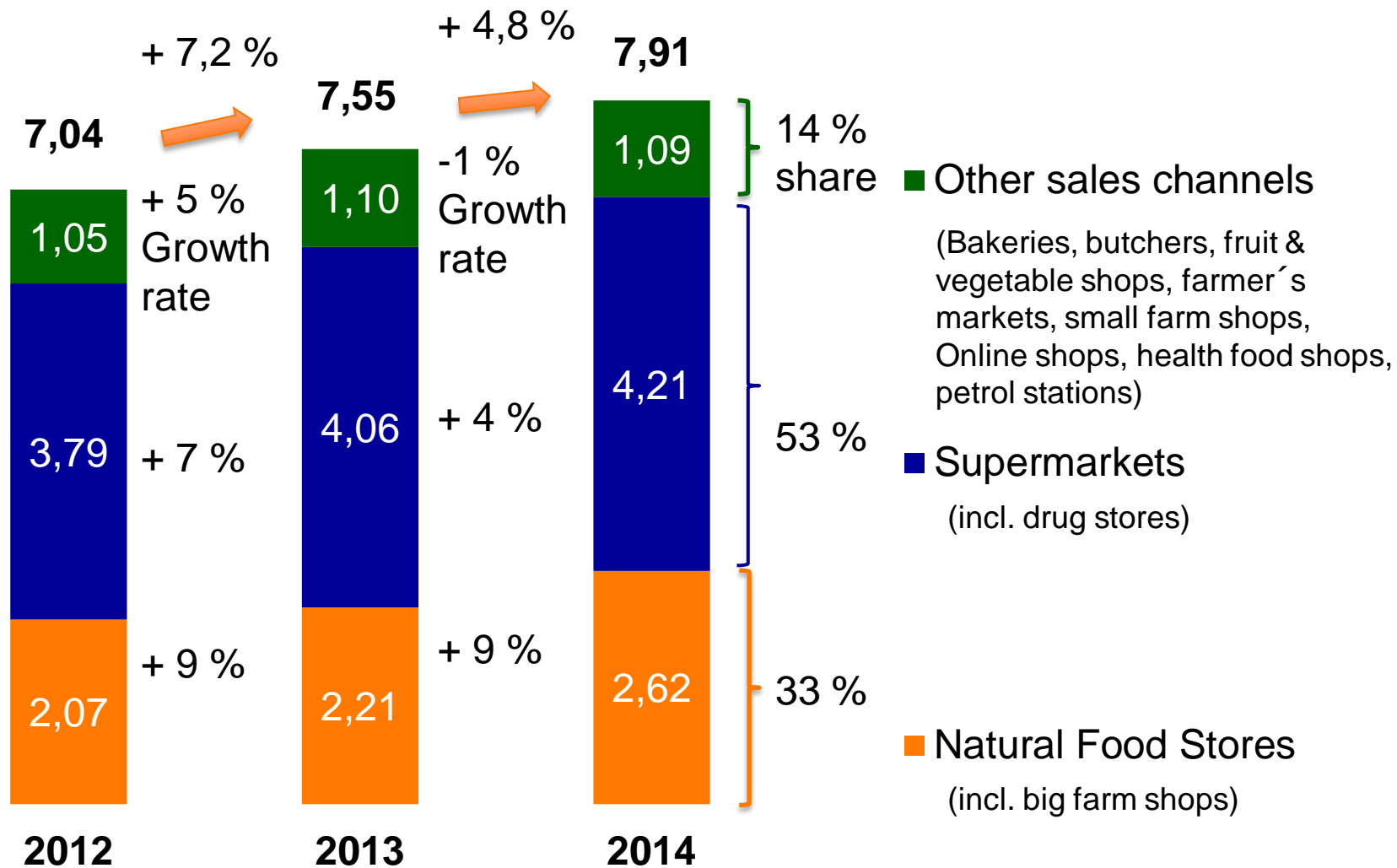
- Good harvest for cereals, protein crops and fruit, average harvest for many vegetables and potatoes 2014 – good supply in the second half of the year with lower prices, shorter supply in the first half of the year
- Better supply for all animal product

- Higher consumer prices for many products – contrary to conventional products

- **MARKET GREW by 4.8 % in 2014 up to 7.91 billion EUR – 3.8-4.0 % of the entire food market**

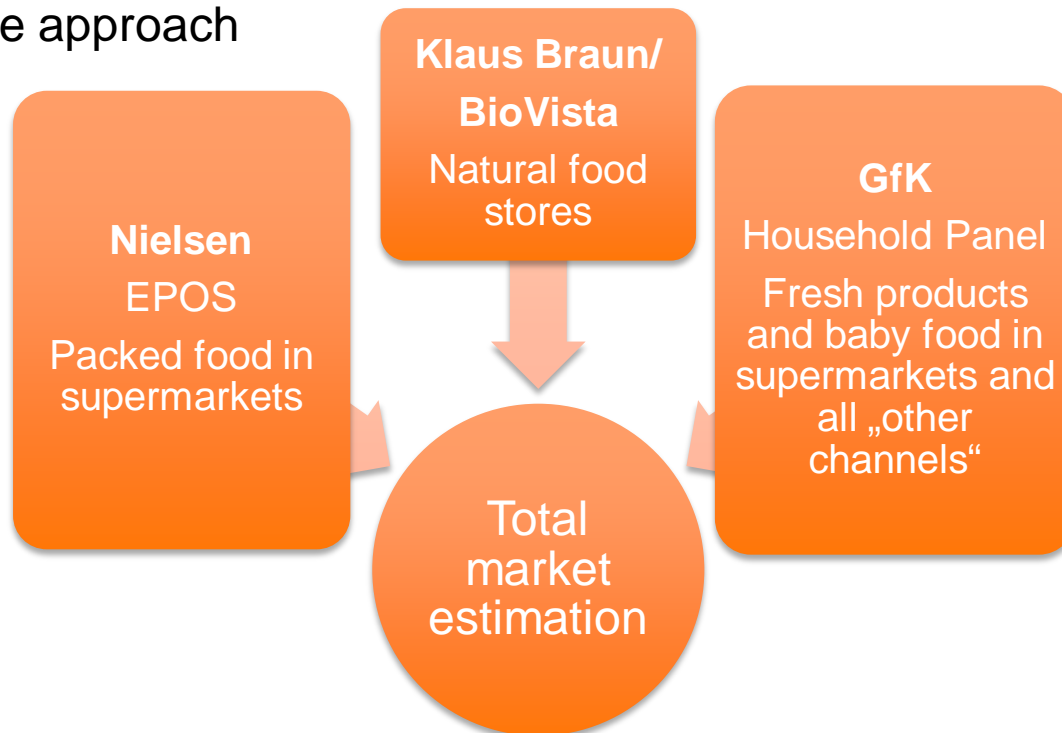
Organic sales in Germany

in billion EUR excl. Catering



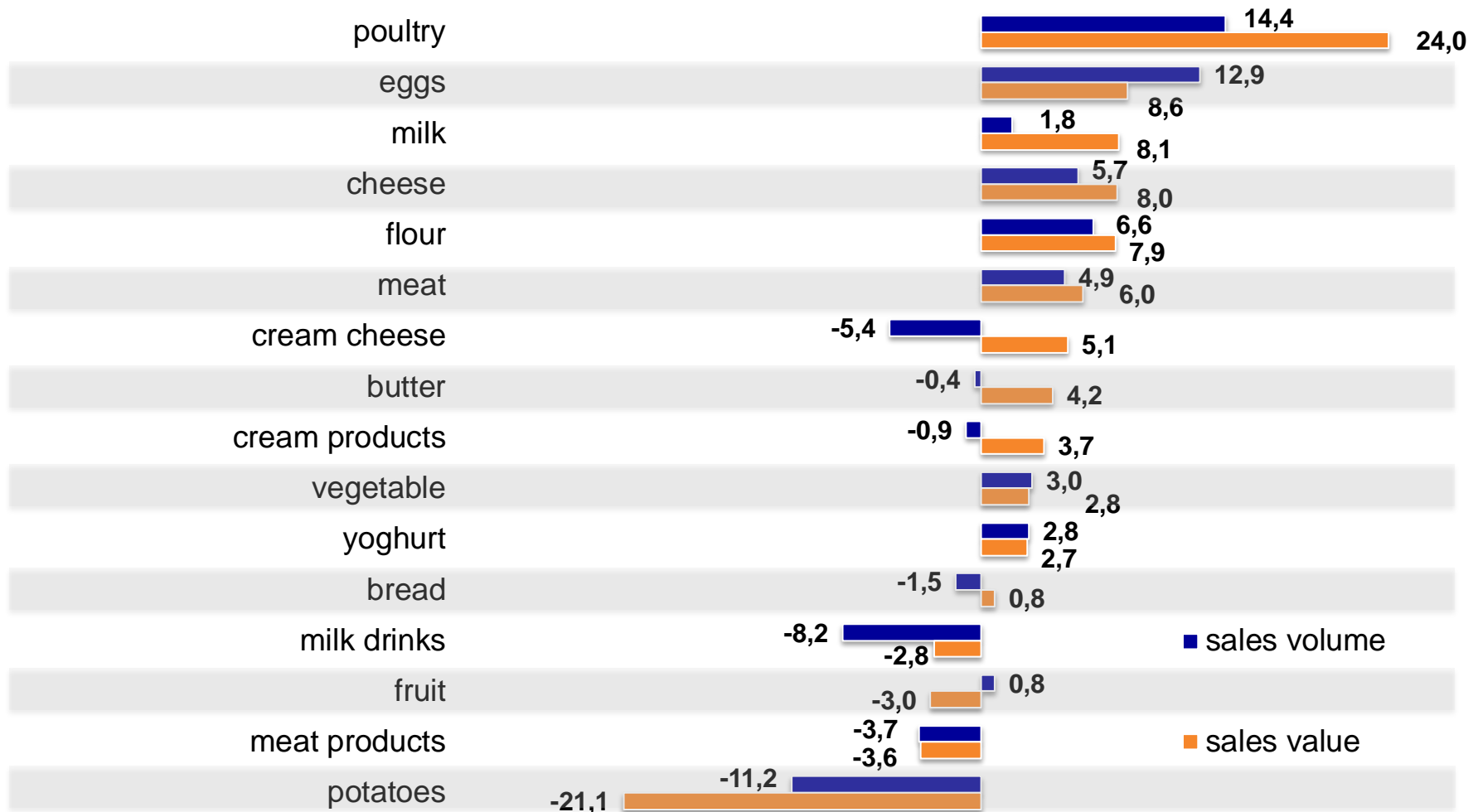
Task force organic market

- Consists of panel organisations (GfK, Nielsen, BioVista, Klaus Braun), two scientists (Uni Kassel and Uni Weihenstephan-Triesdorf), the organic umbrella association BÖLW and is coordinated by the AMI
- Meeting minimum annually end of January
- Not easy to make everybody sharing data – as they are competitors
- Data puzzle approach

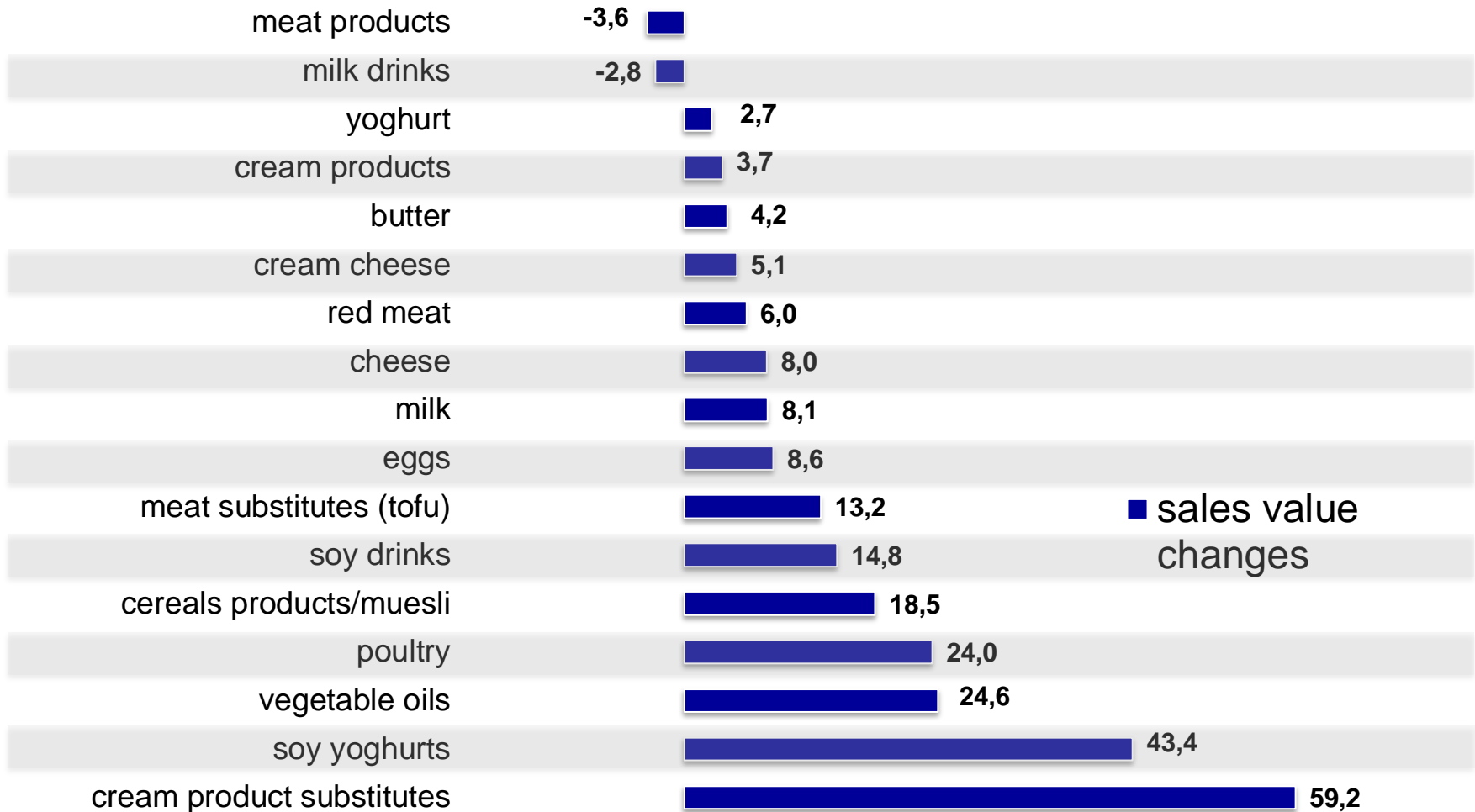


Sales volumes and values growth rates

(2014 versus 2013 in %)



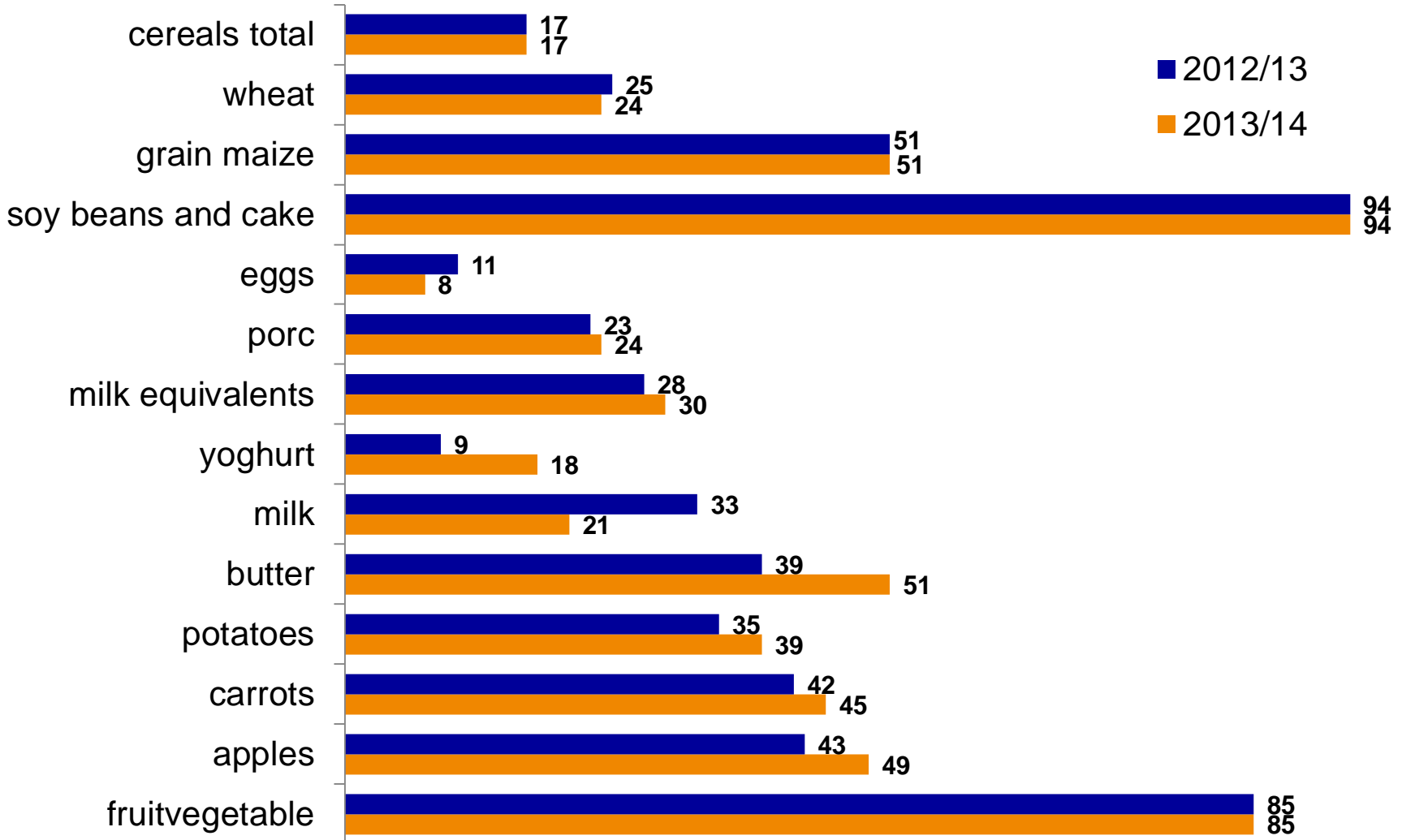
Vegan und vegetarian products grew most (2014 versus 2013 in %)



Import estimation: Puzzle approach



Import shares of different organic products in Germany (2012/13 and 2013/14) in %





Questions? Remarks?

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