

The organic market in Germany 2025: Drugstores and discounters, and private labels push the market

BIOFACH CONGRESS 2025

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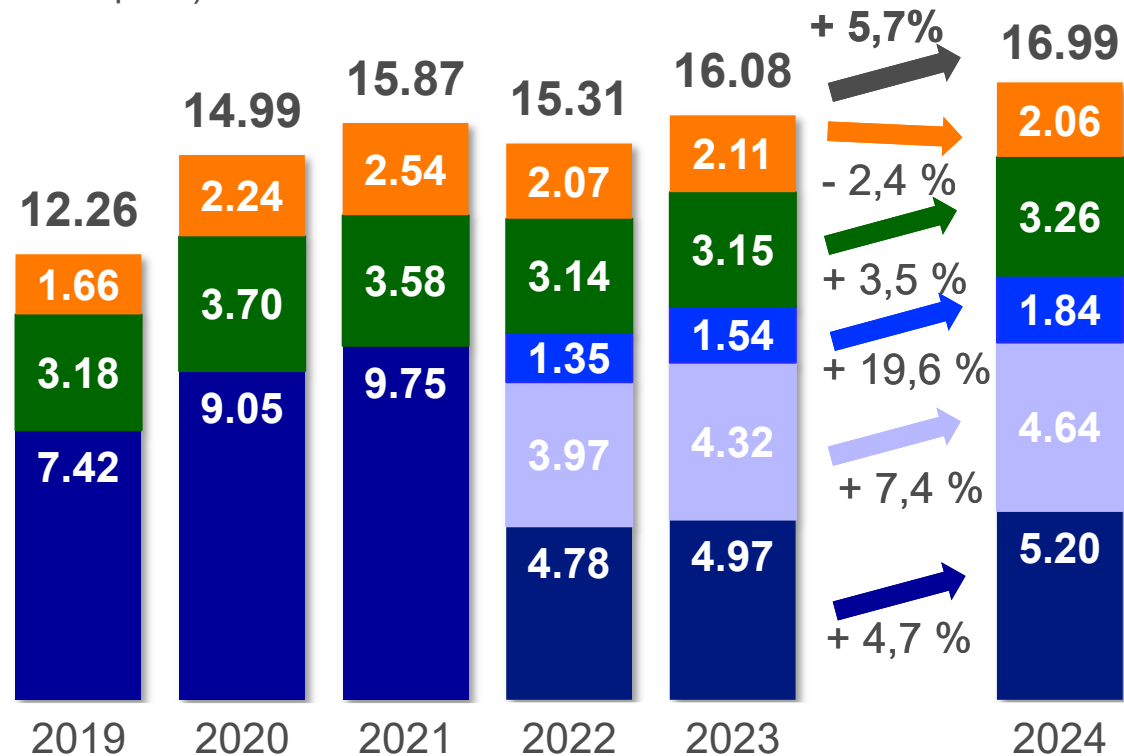
Organic market grows again up to 17 billion €



Consumer expenditure for organic food and beverages by place of purchase, in Germany, in Billion EUR (excluding out of home consumption)



Insgesamt
Other places of purchase
 bakery, butchery, green-grocers, street markets, farm shops, online, health food shops, others
Natural Food stores
 incl. farm shops with more than 50.000 € purchases of traded goods
General Retailers*
Drugstores
Discounter
Full-range supplier

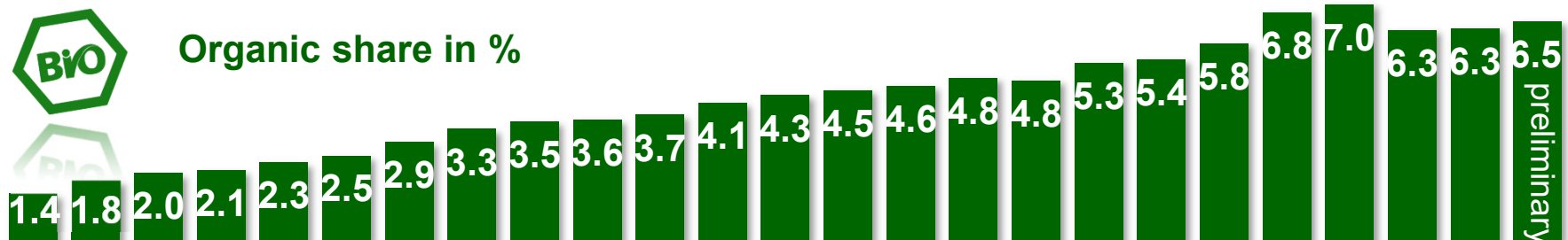
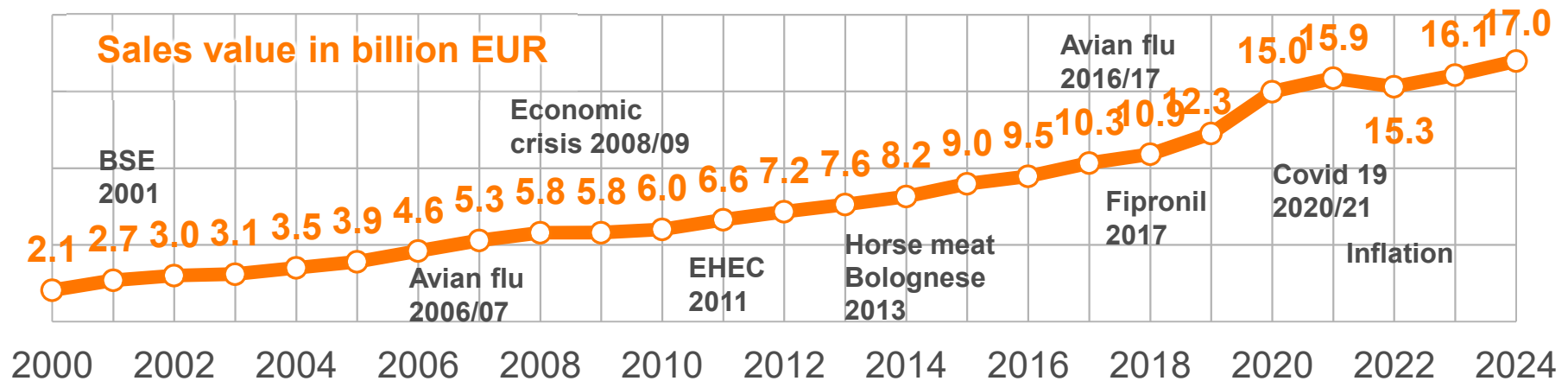


*from 2022 on with subdivision of food retail according to YouGov

Organic market share rises again



Market Value for organic food and beverages in Germany in billion EUR and organic share of total food and beverages market in percent

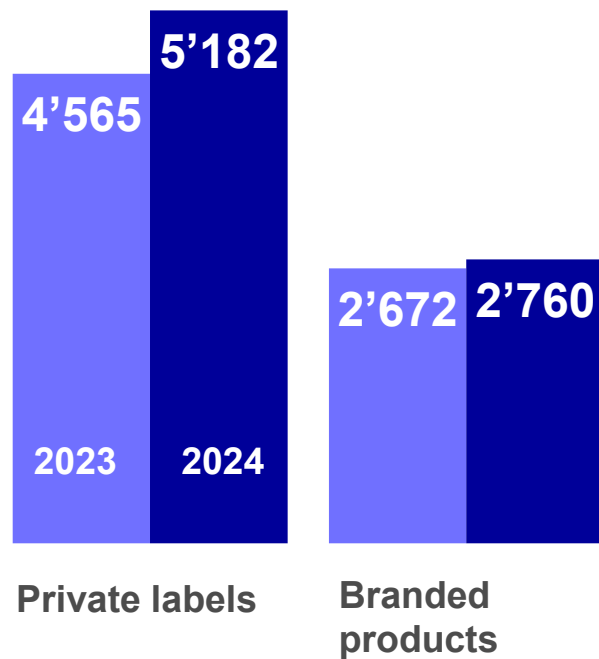


Private labels win market share

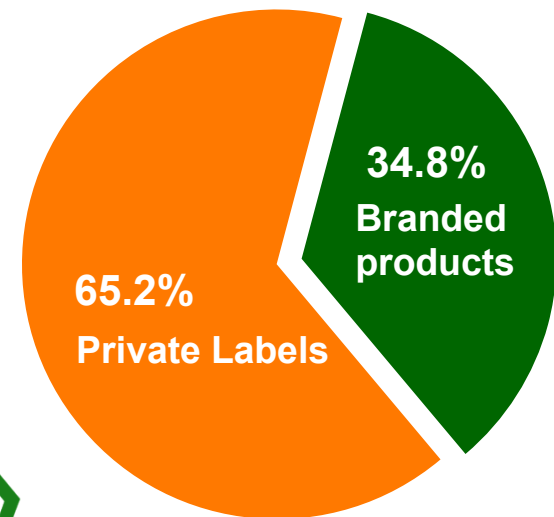
Share of sales with private labels and manufacturer brands of organic prepacked EAN coded food, in %



Sales in million EUR

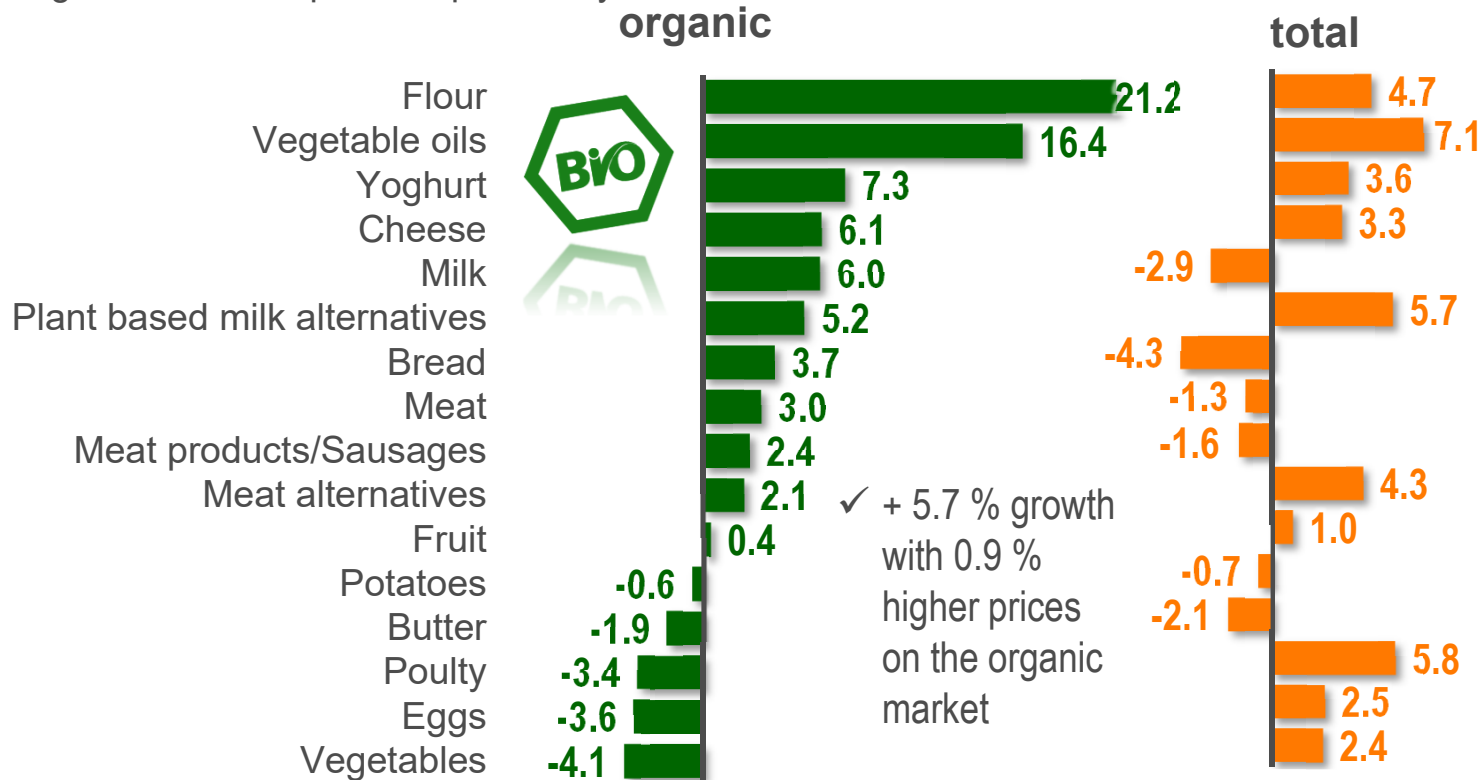


- ✓ Organic food private labels increase sales by a strong 13.5%, while growth in branded products is significantly lower at +3.3%.
- ✓ As a result, the share of branded products continues to fall to currently 34.8%



Higher sales volumes for many organic products

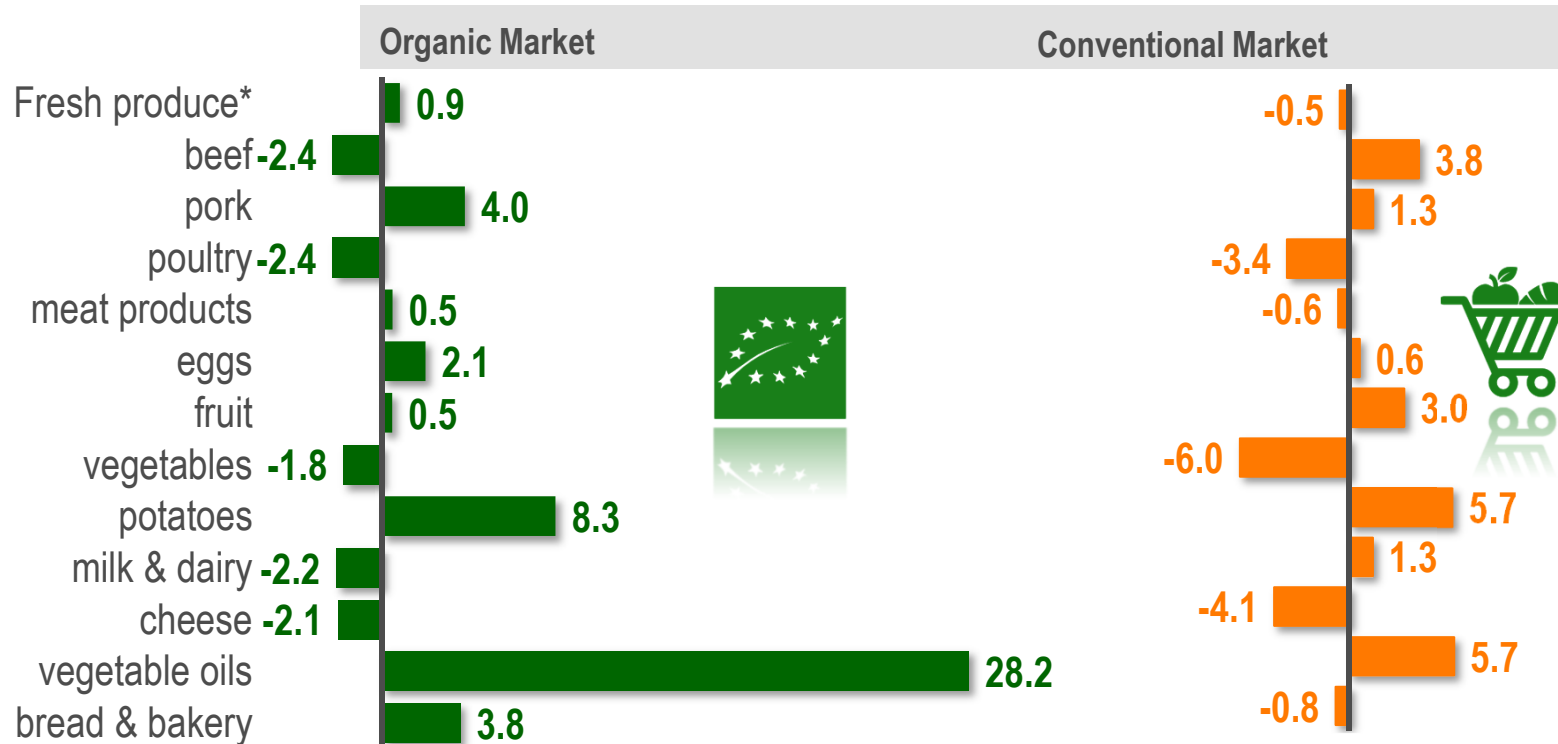
Sales volumes of private households in Germany, organic and conventional, 2024, growth rate compared to previous year in %



Consumer prices hardly rise at all, organic and conventional



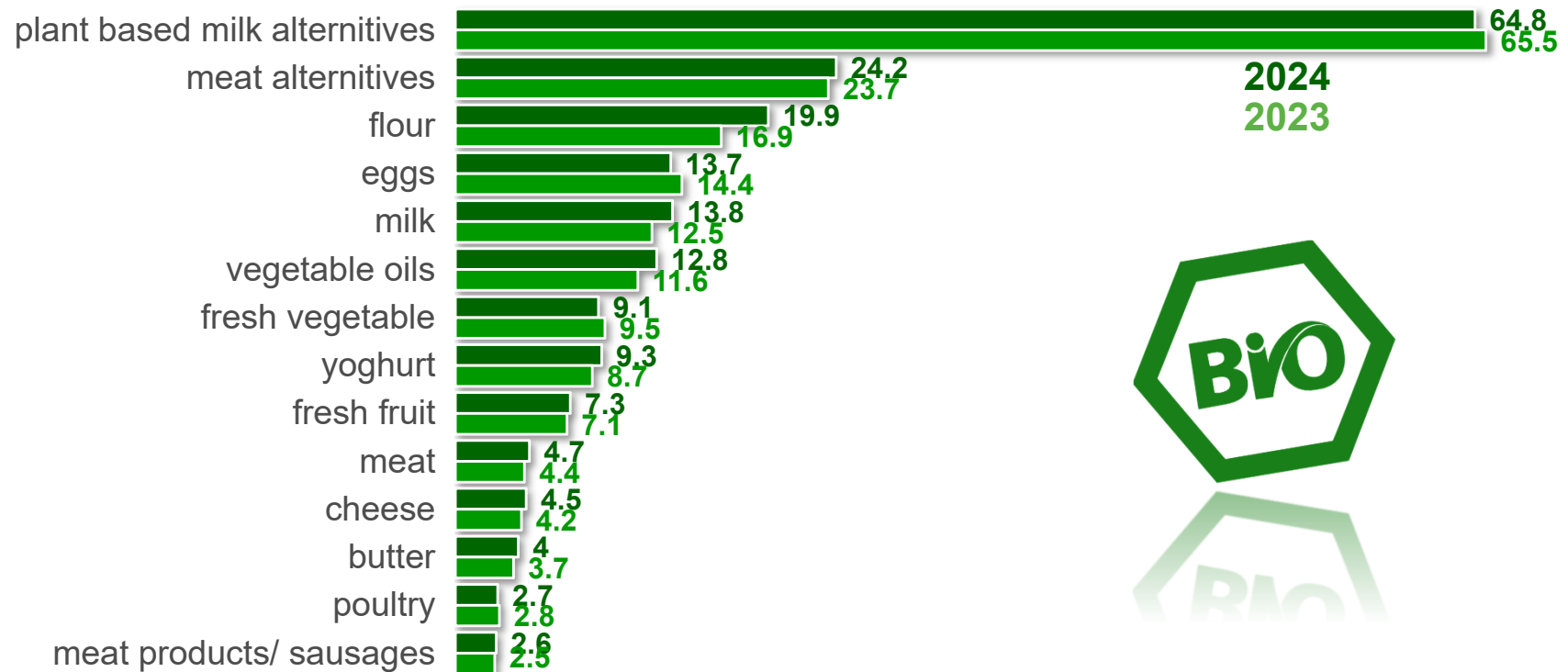
Rates of change in consumer prices for fresh food¹⁾, organic and conventional, in Germany, 2024 compared to 2023, in %



1) Sum of all mentioned products

Up and down with the organic shares

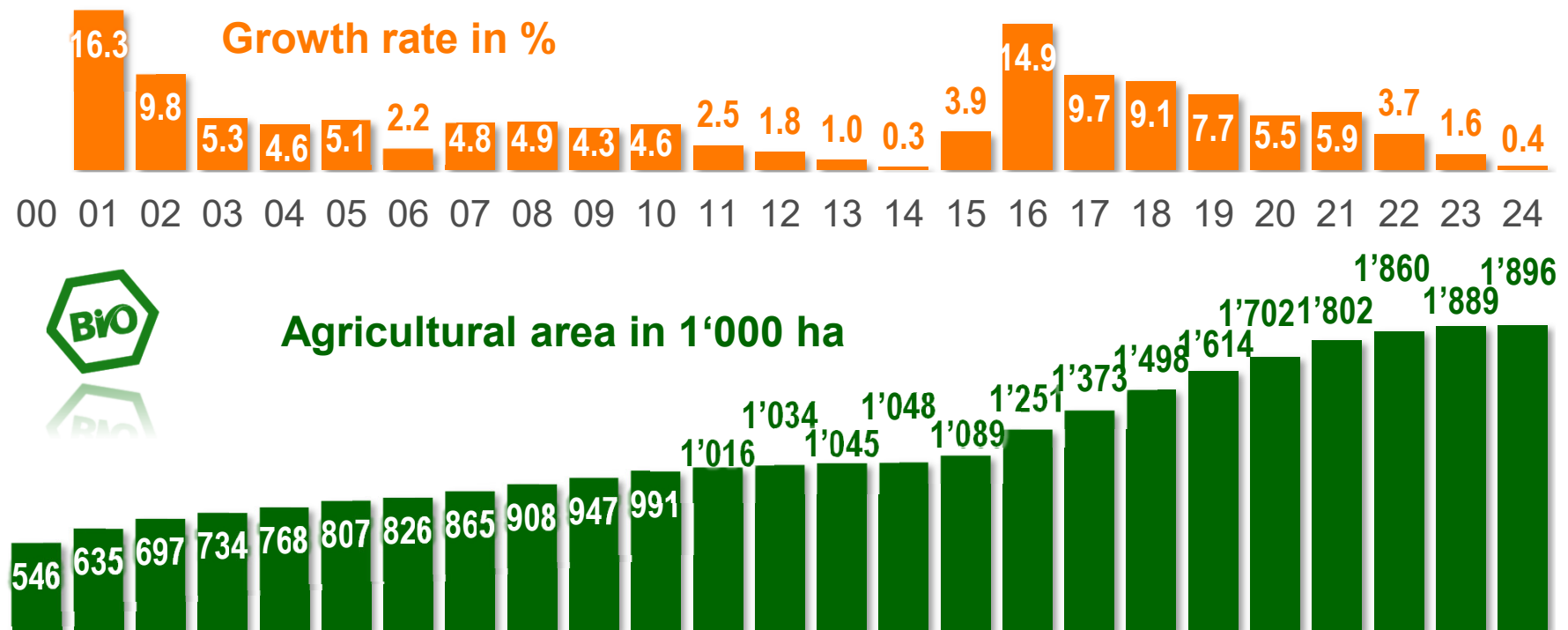
Organic shares in volumes, in Germany, in %



Organic Area in 2024 without impulses



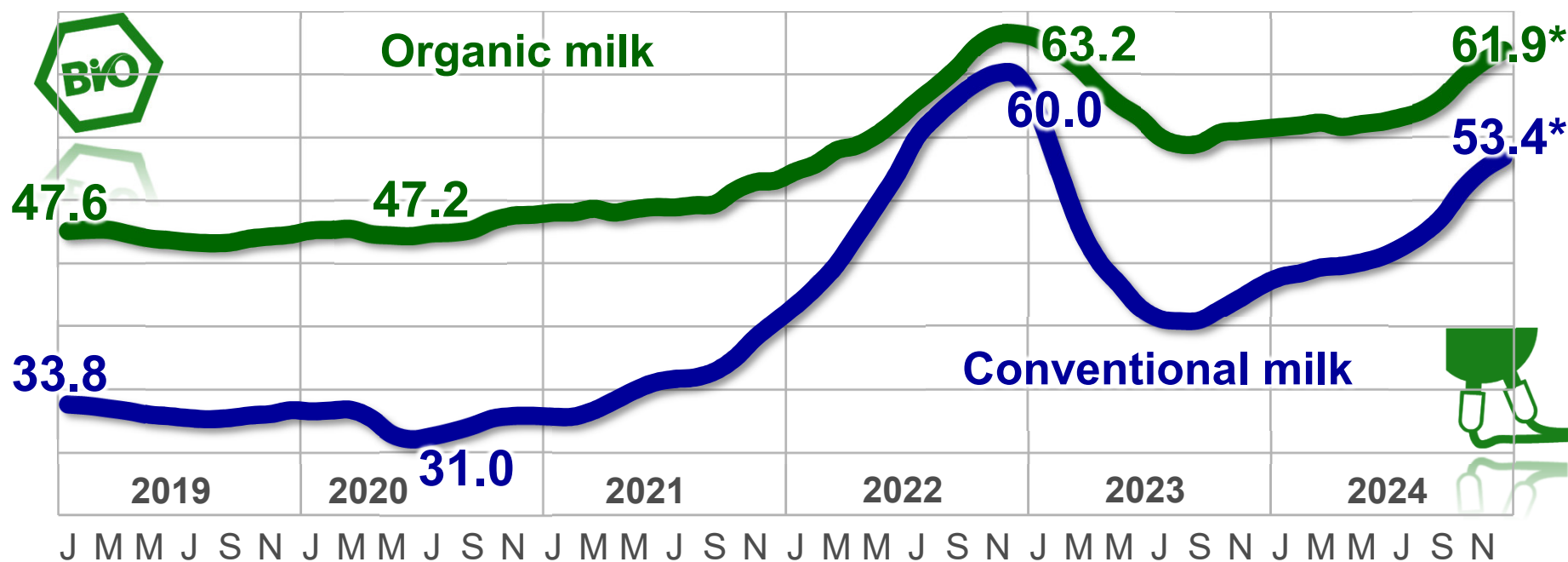
Development of organic area in Germany, growth rate compared to the previous year in % and area in 1,000 ha



Rising producer prices, but do not cover production costs



Farm-gate prices for cow's milk with 4.0 % fat and 3.4 % protein, ex farm, producer location, Germany, in Ct/kg, excluding VAT.

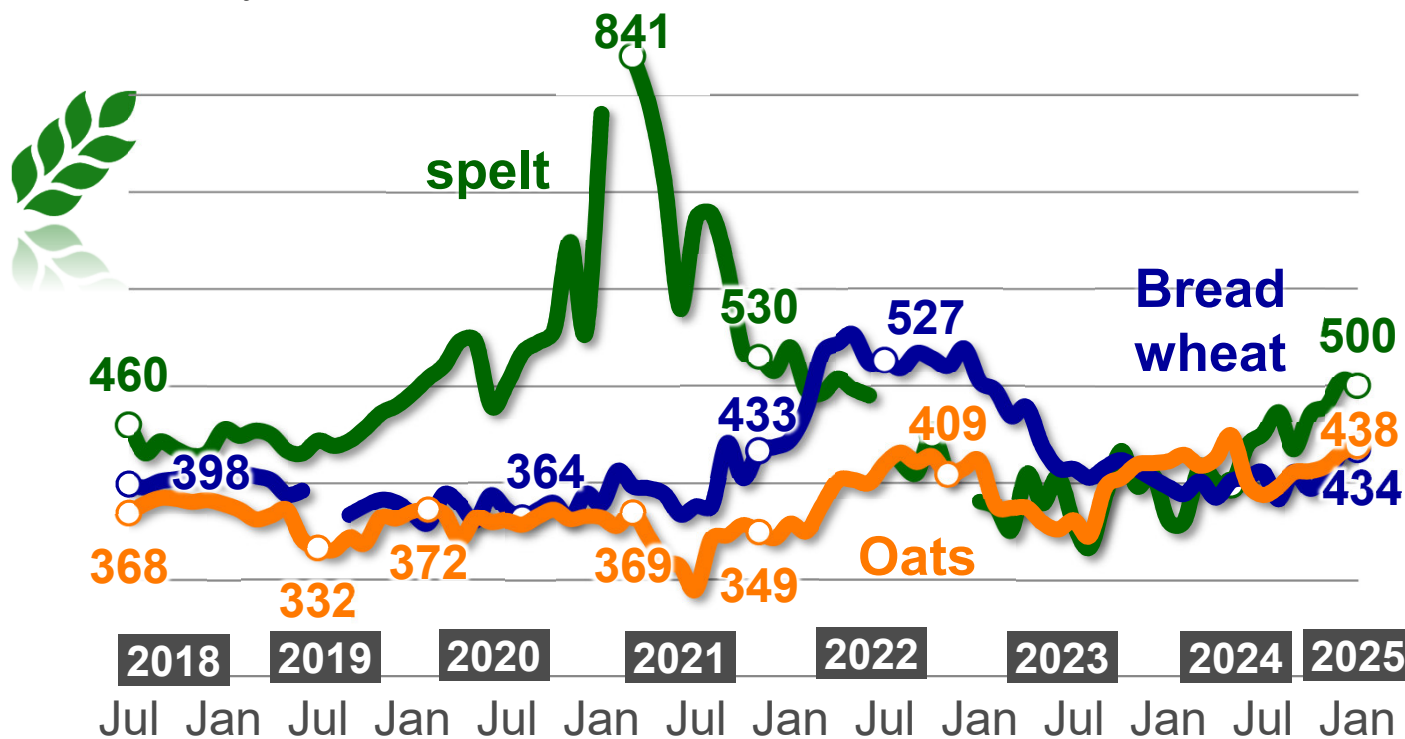


* December 2024: AMI estimate. Monthly values without additional payment.

Organic grain prices rise since the turn of the year



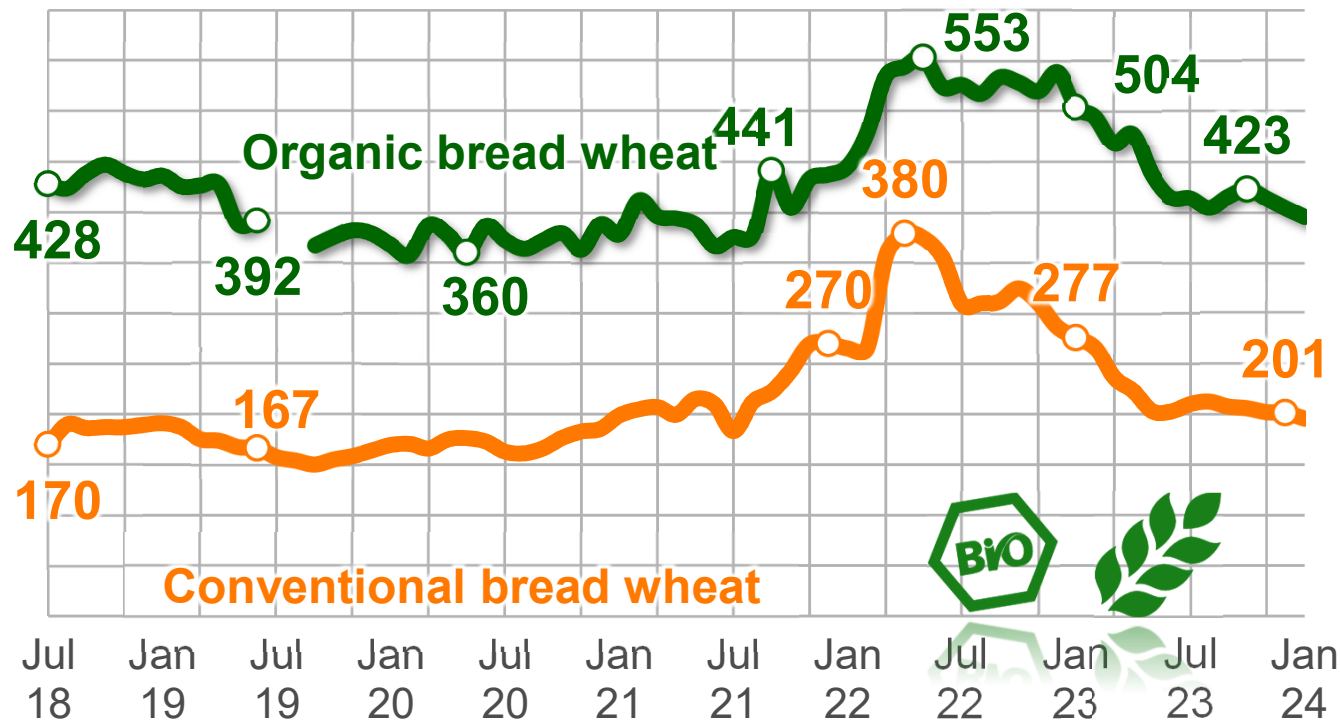
Producer prices for organic cereals in Germany, bulk goods, free processor/mill, in EUR/t, until January 2025



- Small organic harvest volume 2024: - 1.09 million tonnes
- More oats,
- All other cereals smaller harvest
- Fewer quality problems than in 2023
- Little feed again
- Rising prices since the turn of the year,
- Long low price phase before that - bringing farmers into financial difficulties

Falling grain prices since the 2023 harvest

Producer prices for organic and conventional bread wheat in Germany, bulk goods, free processor/mill, in EUR/t, until January 2024



- Stable harvest volume in 2023: - 1.25 million tonnes
- Less spelt and oats
- More wheat, rye and barley
- Major quality problems
- Little food grain, lots of fodder
- Prices have fallen since spring 2023 due to large supply
- Winter crops 2024 often in poor condition

Summary



Market growth, but economically difficult for farmers and processors

- **Organic market is growing again**
 - ✓ Via larger volumes
 - ✓ stronger than the conventional market
 - ✓ again stronger than the inflation rate
 - ✓ Especially in drugstores and discounters
 - ✓ Organic food trade is catching up again
 - ✓ Private labels continue to gain high shares
- **BUT:**
 - Conventionalisation of the market - with the corresponding trade practices
 - Producer prices are not always sufficient to cover farmers' costs
 - Conversion rates have slowed down
 - Some processing companies have gone bankrupt
 - Reconversion and farm closures due to generational changes
 - Structural change but also professionalisation at all levels - producers, processors, trade

We are here for you – contact us

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