

The German Organic Market 2025:

High demand, but not enough production

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The organic market grows again up to 18.23 billion €



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



Total

Other places of purchase
bakeries, butcheries, green-grocers, streetmarkets, farm shops, online, health food shops, others

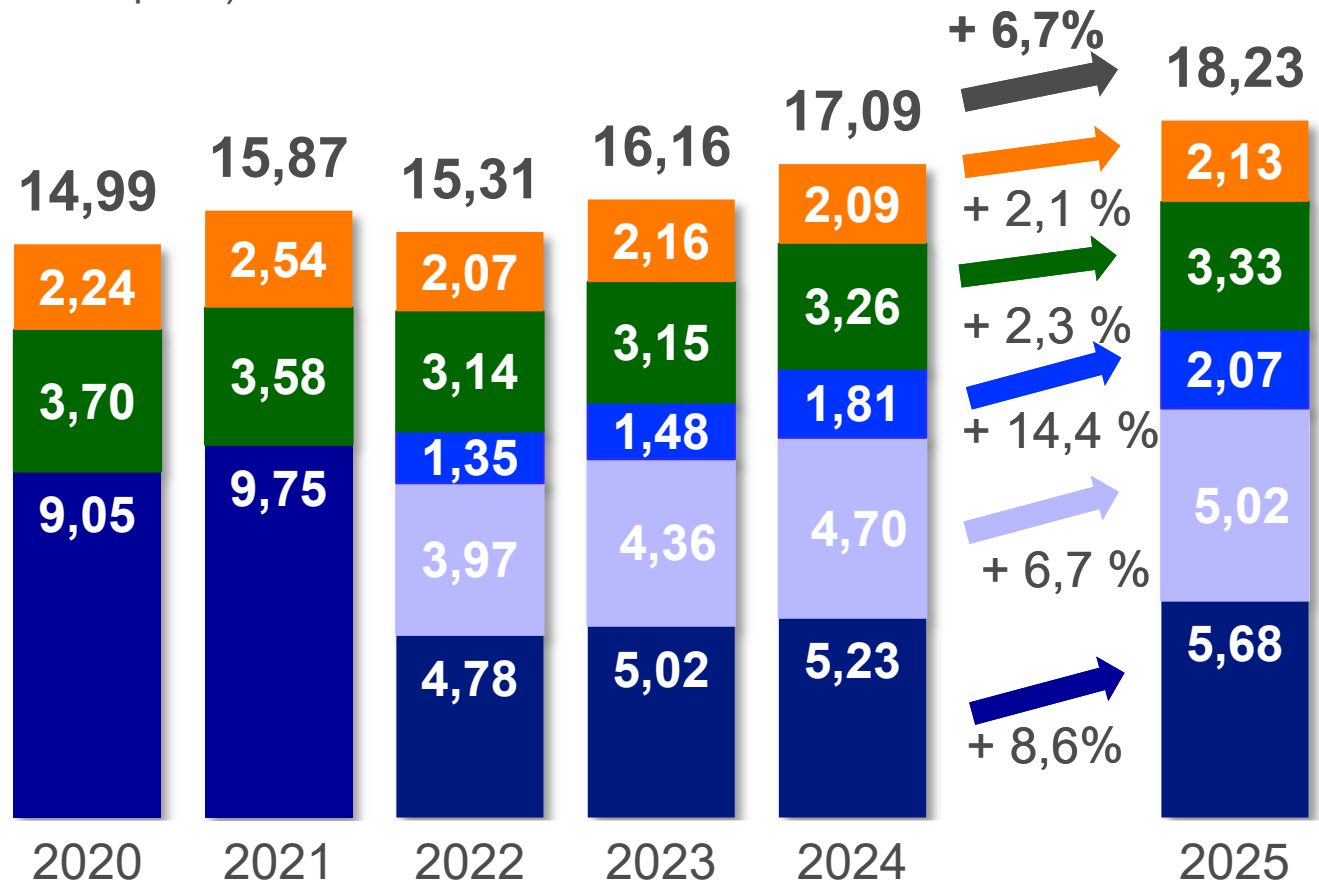
Natural Food stores
incl. farm shops with more than 50.000 € purchases of traded goods

General Retailers*

Drugstores

Discounters

Full-range supplier

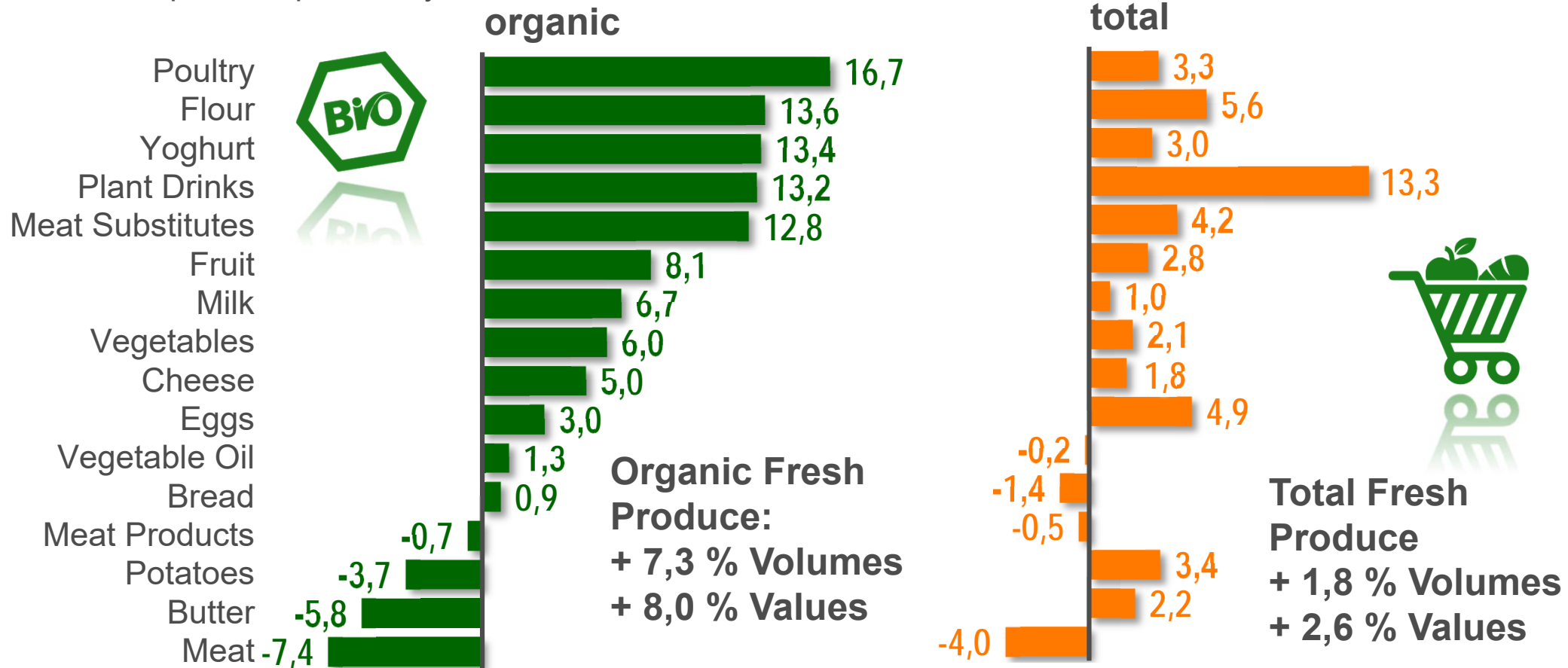


* from 2022 on with subdivision of food retail according to YouGov

Higher sales volumes for many organic products



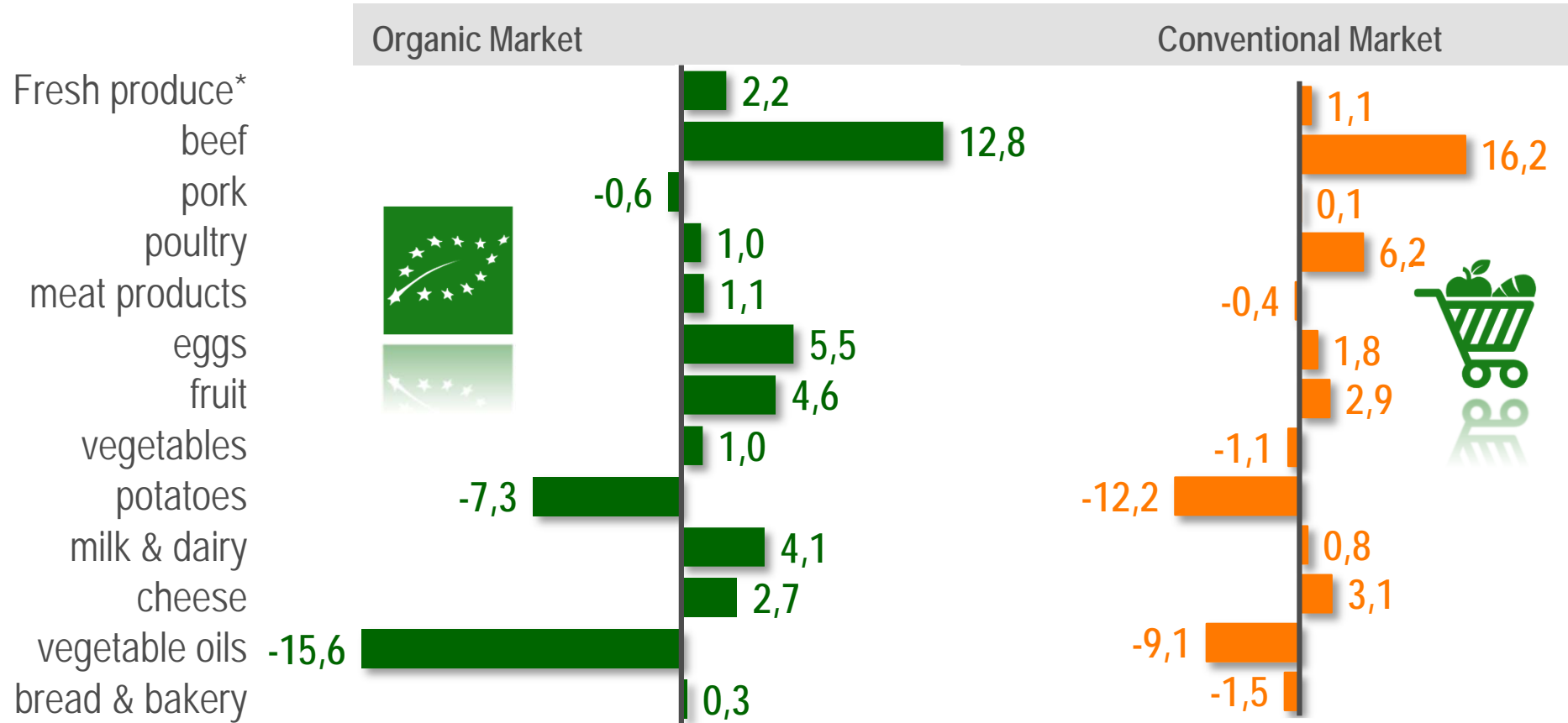
Sales volumes of private households in Germany, organic and conventional, 2025, growth rate compared to previous year in %



Consumer prices hardly rise at all, organic and conventional



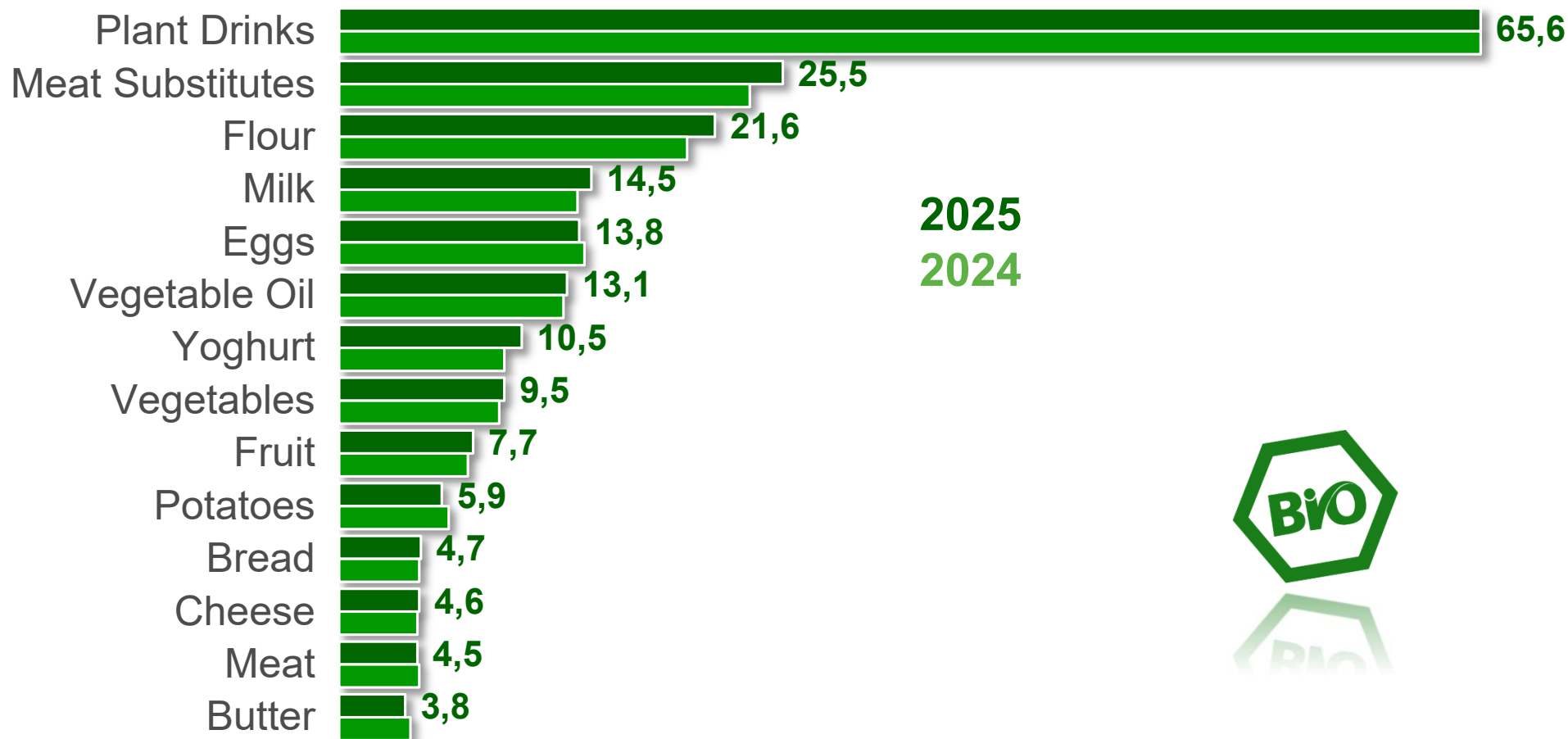
Rates of change in consumer prices for fresh food¹⁾, organic and conventional, in Germany, 2025 compared to 2024, in %



1) Sum of all mentioned products

Organic Shares often higher in 2025

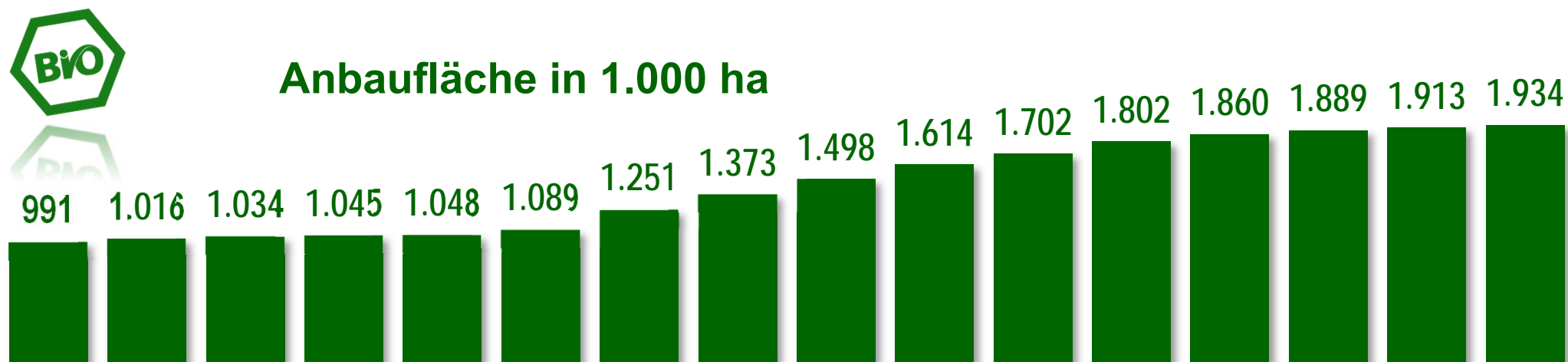
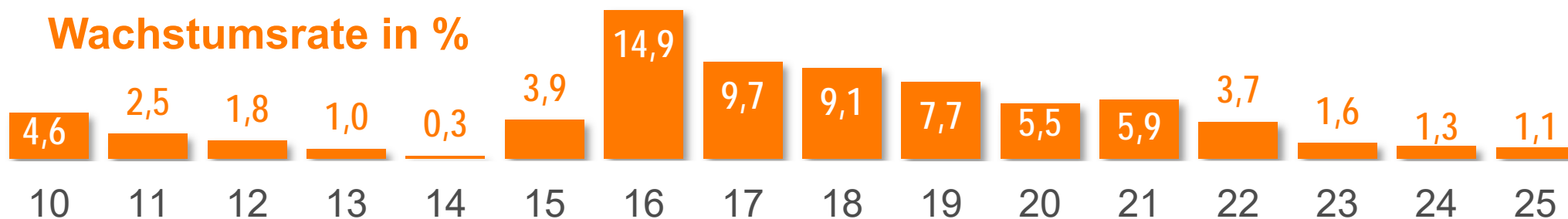
Organic shares in volumes, in Germany, in %



Organic Area in 2025 without impulses



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



Production has not grown much, but eggs the most



Organic Production and growth rates in Germany 2020 - 2025*, in %

Organic acreage
in 1.000 ha



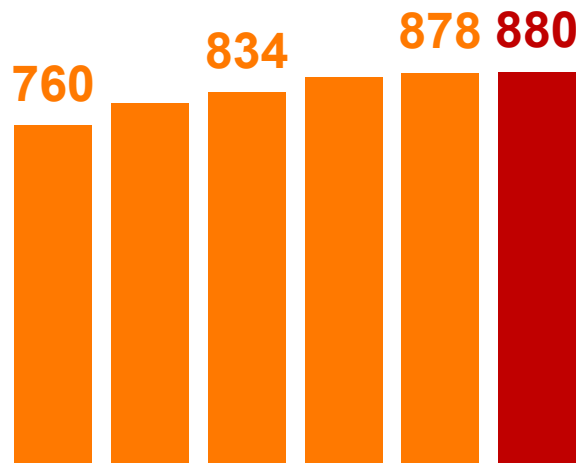
+ 16

Organic pork
in 1.000 t carcass weight

+ 6

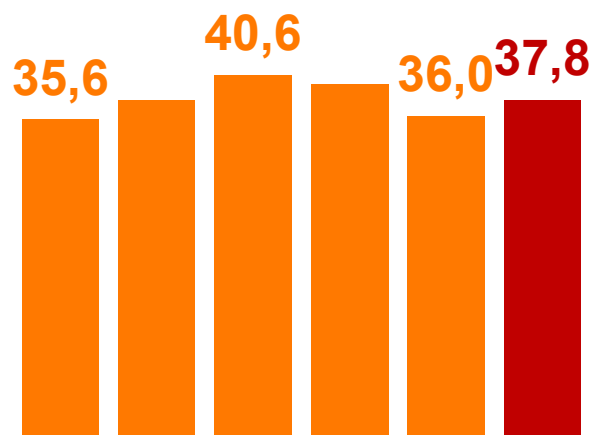
Organic Eggs
in billion pieces

+ 21

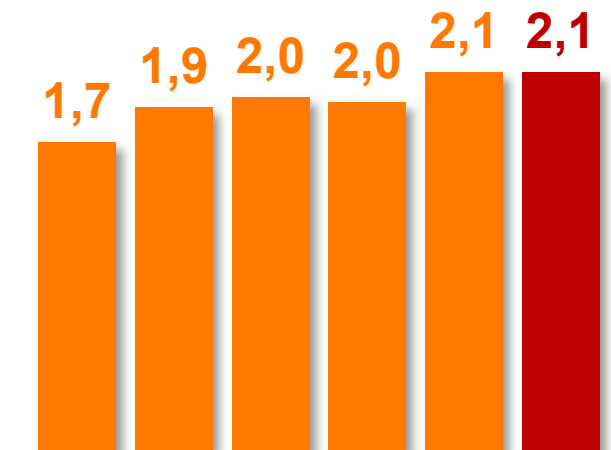


2020 2022 2024

2025: AMI estimation



2020 2022 2024

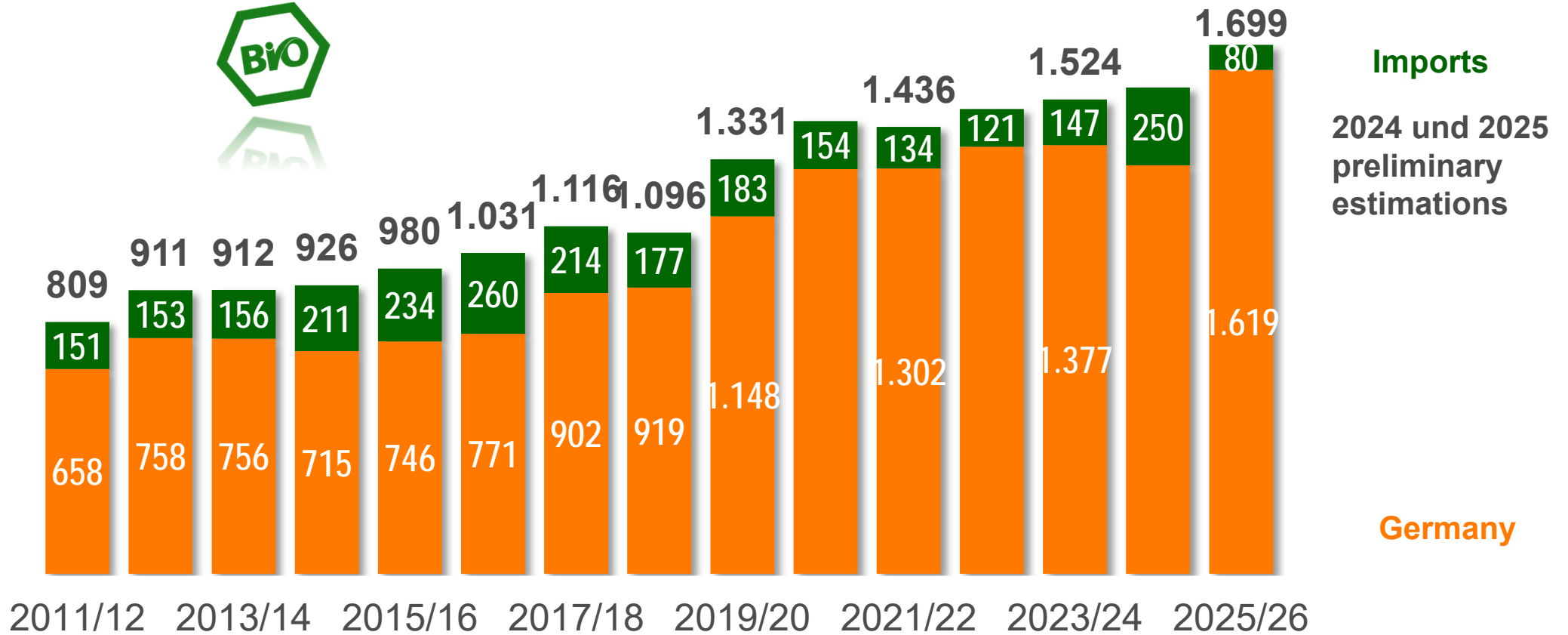


2020 2022 2024

Organic Cereals Imports rise again



Production and imports of organic cereals incl. maize on the German Market, in business years (Jul-Jun) , in 1.000 tonnes



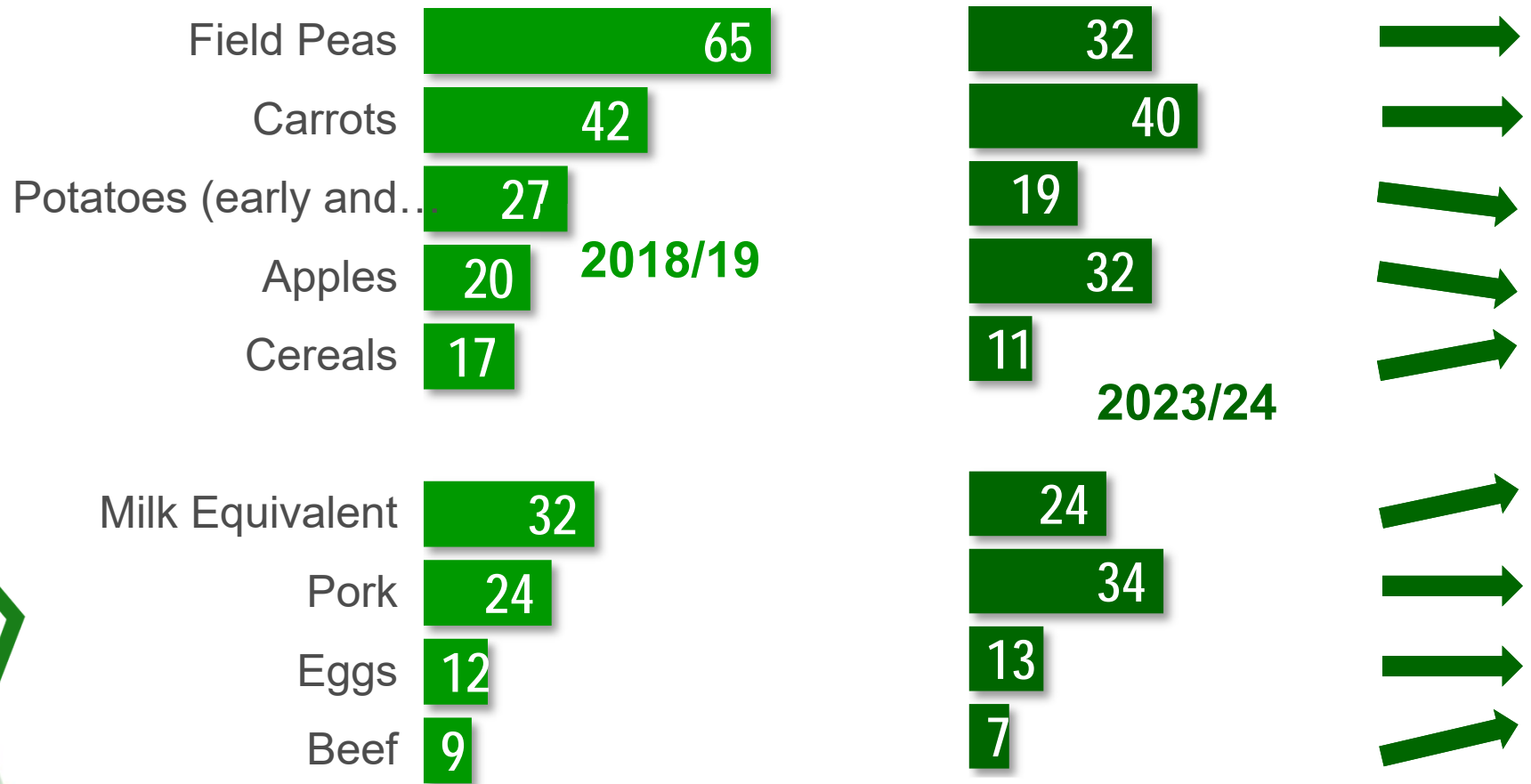
Imports
2024 und 2025 preliminary estimations

Germany

* Extrapolation based on data provided by retail companies and reports on German foreign trade.

Import shares of organic products in Germany

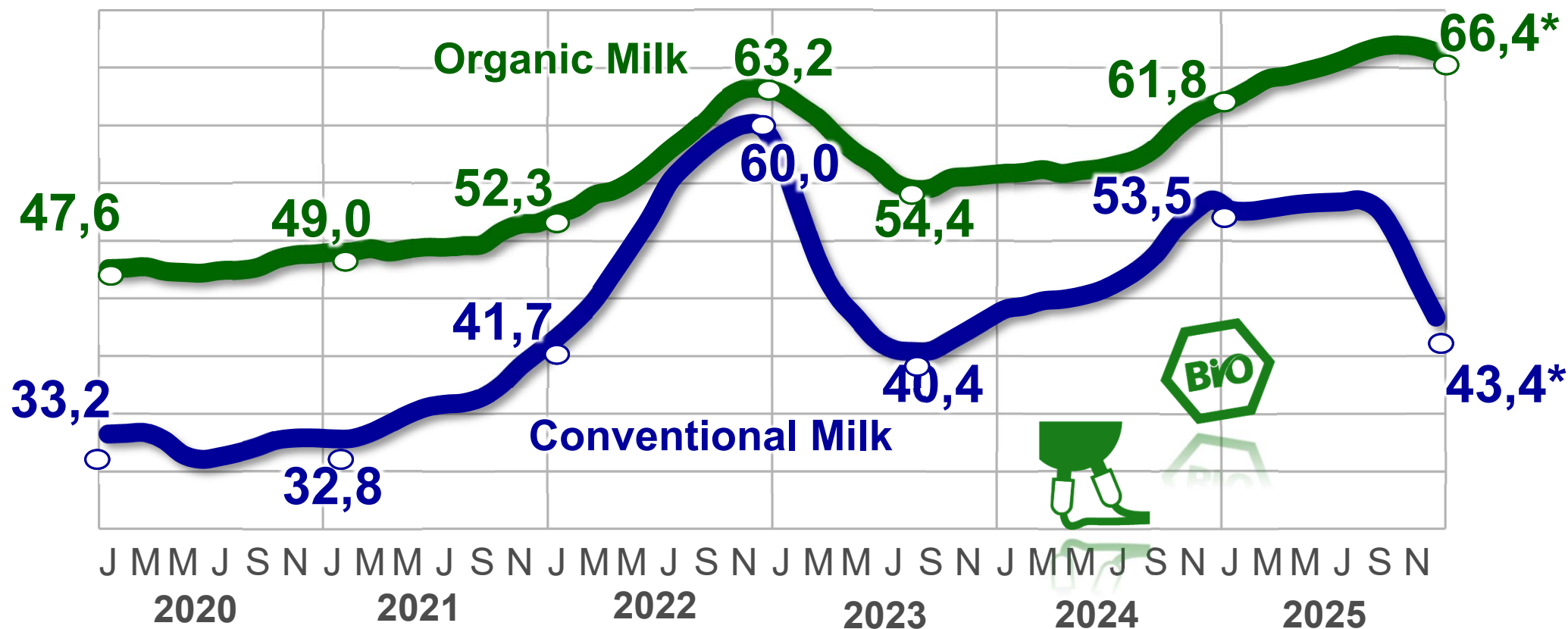
Import shares of selected organic products by business years in Germany in



Price difference continues to grow



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 2025: AMI estimate. Monthly values without additional payment.

Summary



Significant market growth, but market supply is becoming increasingly scarce

- Organic market growing,
 - ✓ significantly stronger than the conventional market
 - ✓ stronger than the inflation rate
 - ✓ Especially in drugstores and full-range retailers
 - ✓ Natural food trade catching up again
 - ✓ Private labels continue to gain high market share
 - ✓ Association labels increasingly important and in all shopping venues
- Conventionalisation of the market – with corresponding trading practices
- Conversion rates have slowed down
- Reversals and business closures due to generational change
- High energy and transport prices and fluctuations in organic prices make development difficult to plan and more expensive overall
- Political volatility makes planning more difficult
- Structural change but also professionalisation at all levels – producers, processors, trade

Ihre AMI Marktexpertin

Ich bin für Sie da – sprechen Sie mich an.

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