The organic market in Germany

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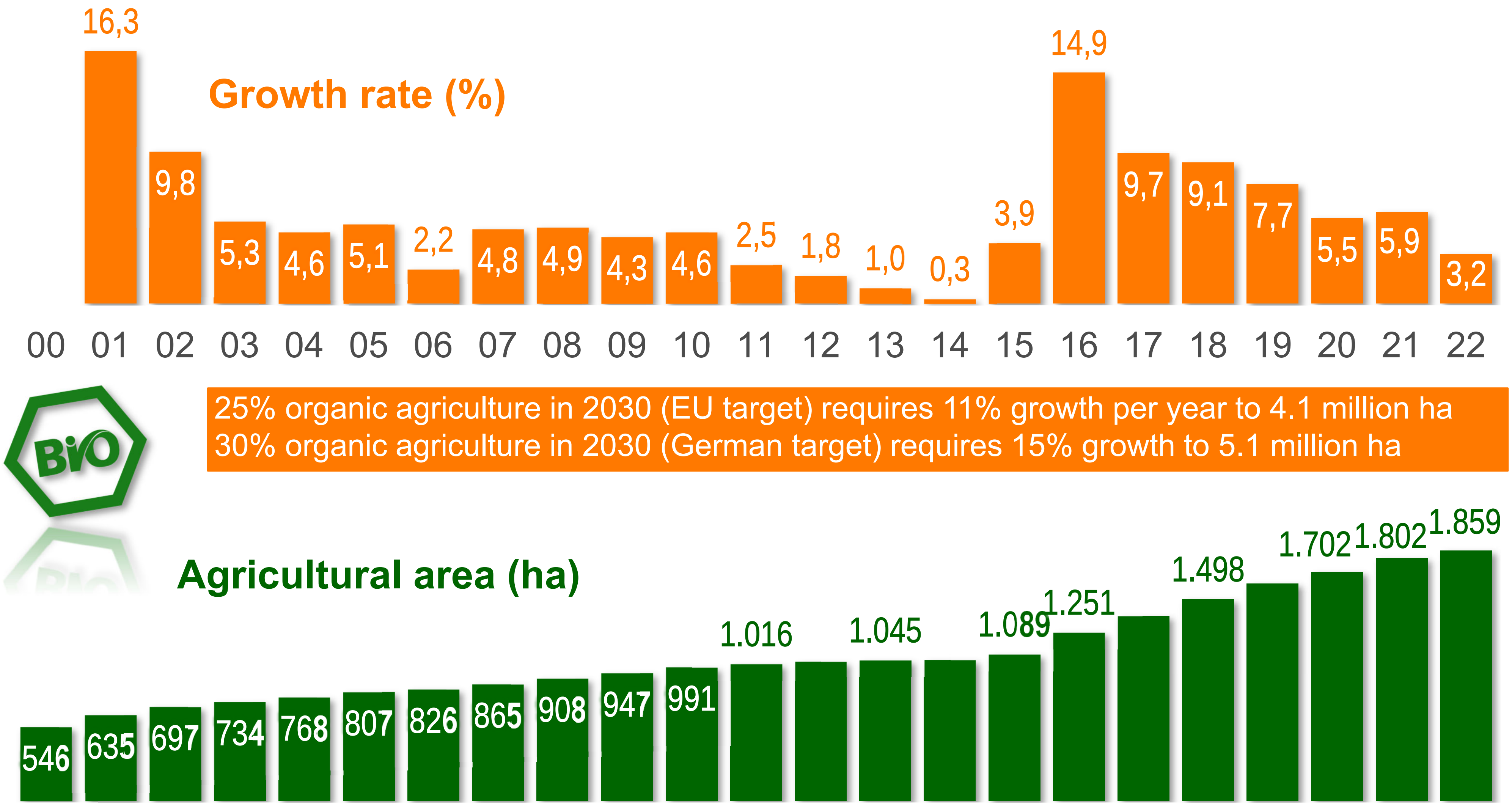
AMI natürlich informiert.

Organic land growth in Germany

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



Source: BLE, BÖLW (2022)

Organic labels at a glance

EU organic label
state
implementation: 1. July 2010
mandatory labeling for pre-packaged organic food

German organic label
state
implementation: 2001
voluntary labeling with EU organic label

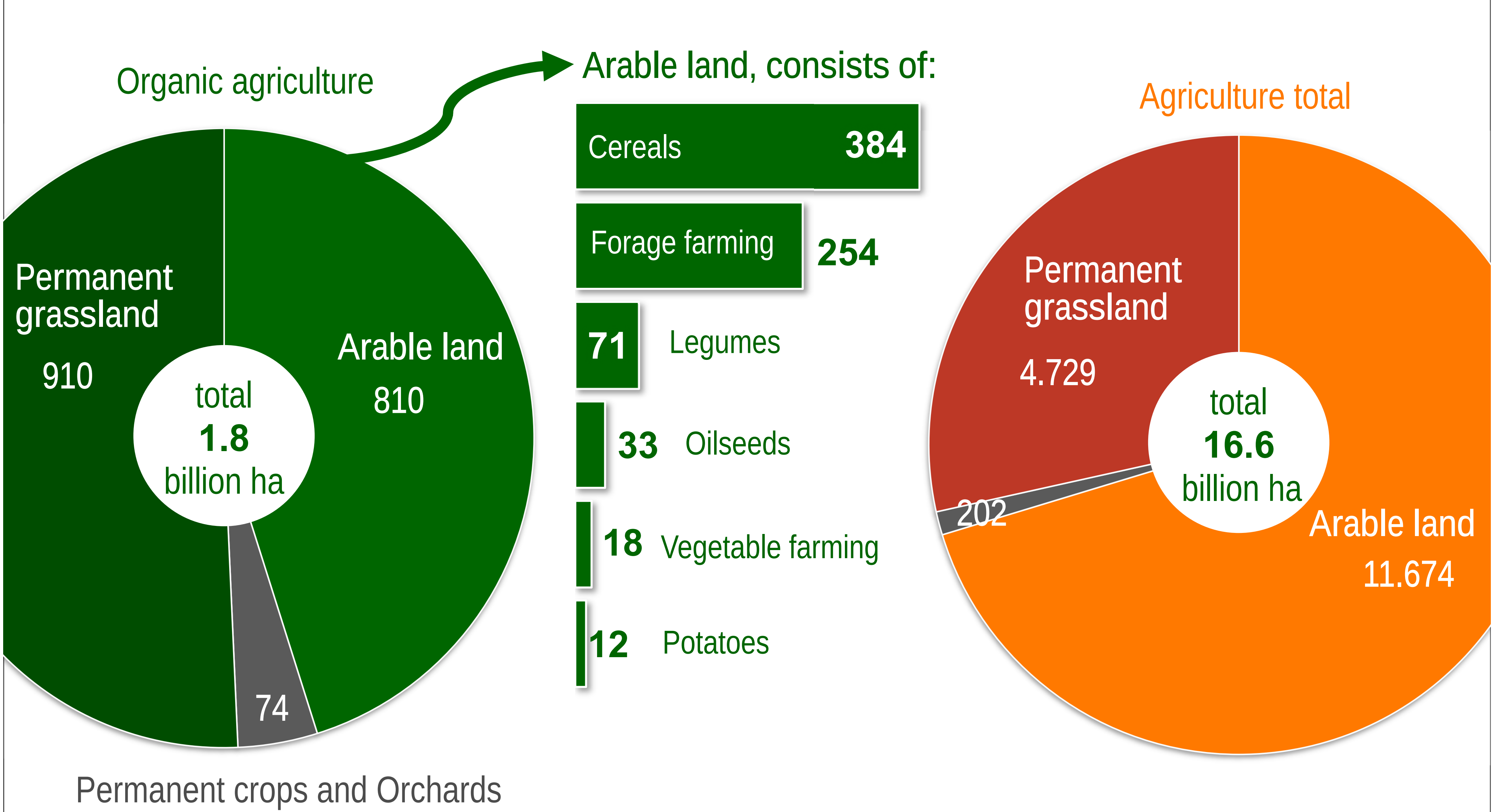
Naturland
private growers association
foundation: 1982
stricter guidelines than EU organic label
producer sectors: agriculture, horticulture, viticulture, beekeeping, ornamentals, aquaculture, fishery, wild collection, forestry
→combines ecological management with fair trade

Bioland
private growers association
foundation: 1971
stricter guidelines than EU organic label
producer sectors: agriculture, horticulture, viticulture, beekeeping, pond farming, wild collection
largest German association
→soil protection & ecological diversity

Demeter
private growers association
foundation: 1924/1954
very strict guidelines
producer sectors: agriculture, horticulture, viticulture, beekeeping
→eco-dynamic agriculture

Land use in organic and conventional farming

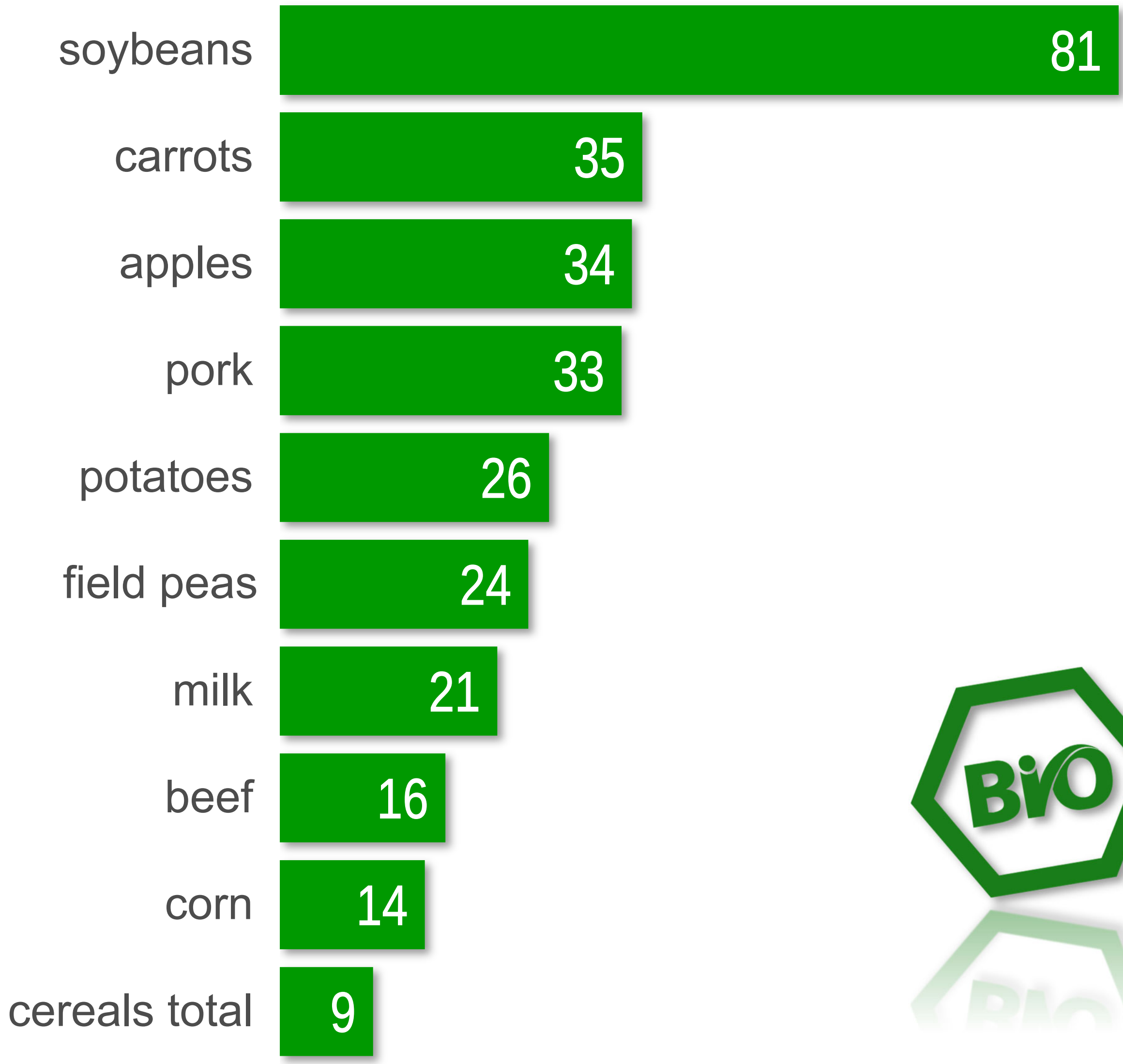
in Germany, 2021, in 1,000 ha



 Source: Destatis, AMI

Import shares for organic products

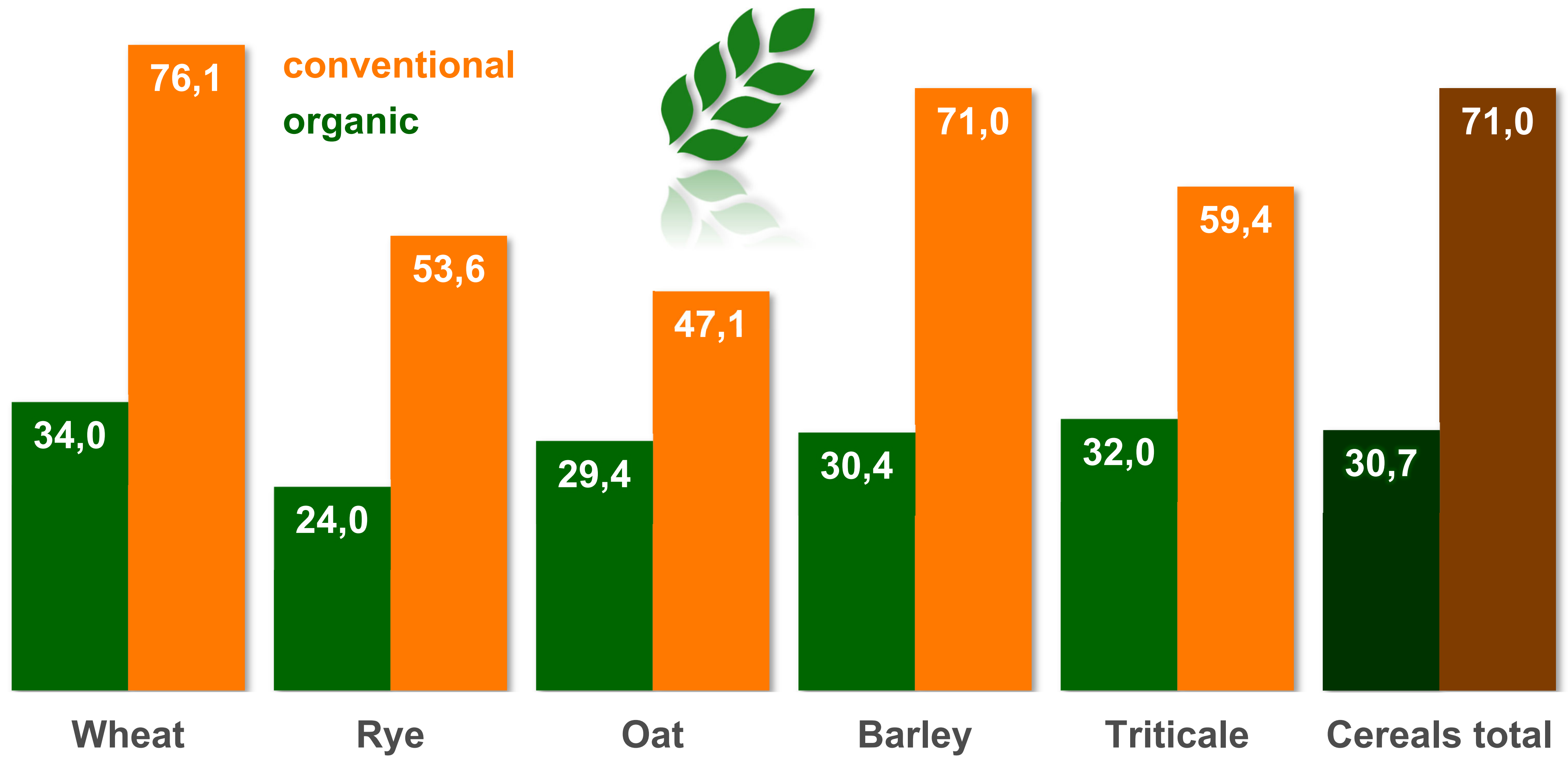
Import shares of selected organic products in 2021/22, in Germany, in percent



Source: AMI

Yields of organic cereals half as big

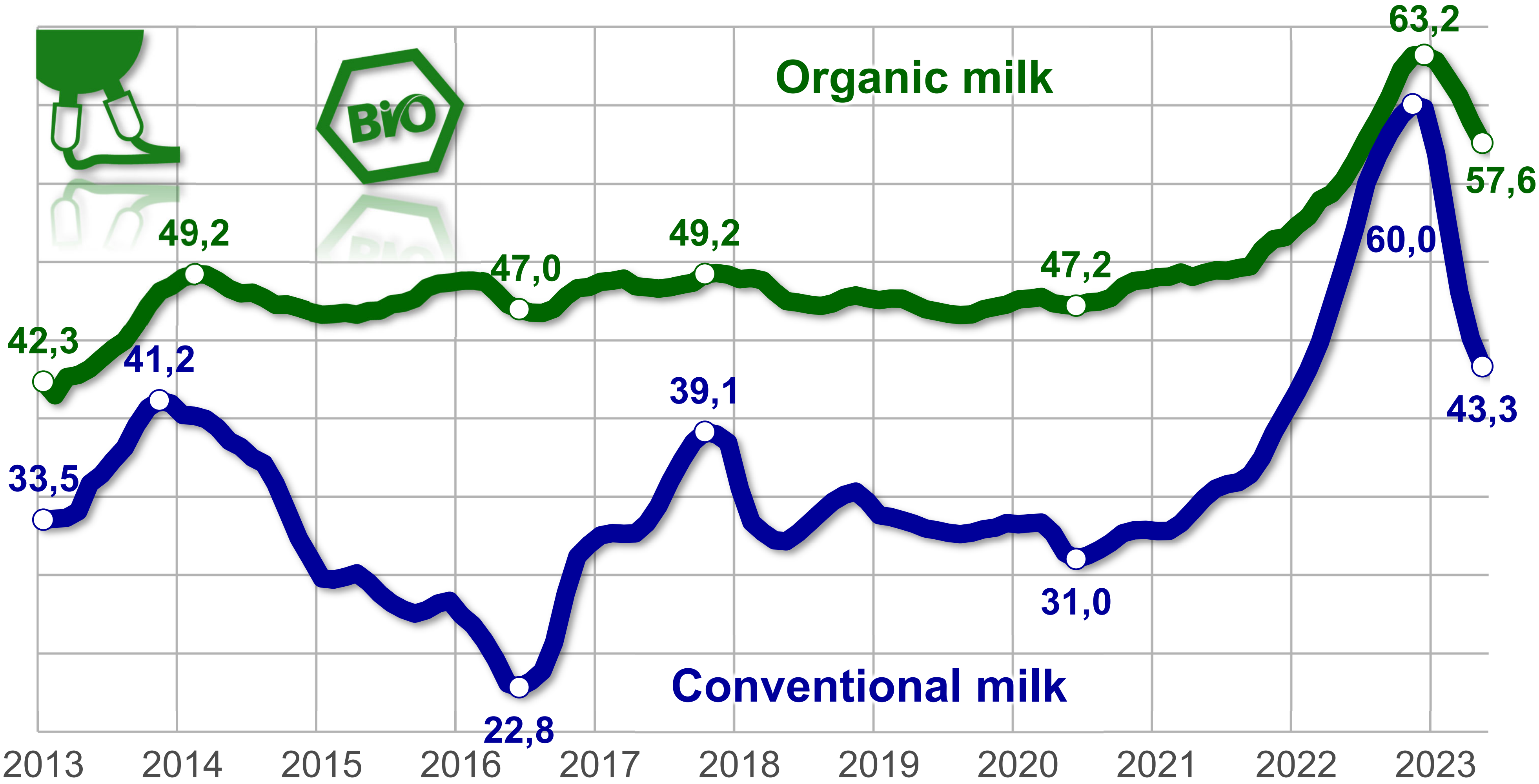
Average yields of organic and conventional cereals, 2022, in Germany, in dt/ha



Source: AMI, Destatis

Long-term comparison organic/conventional

Producer prices* for cow's milk with 4.0% fat and 3.4% protein, farm gate, Germany, in Ct/kg, excluding VAT

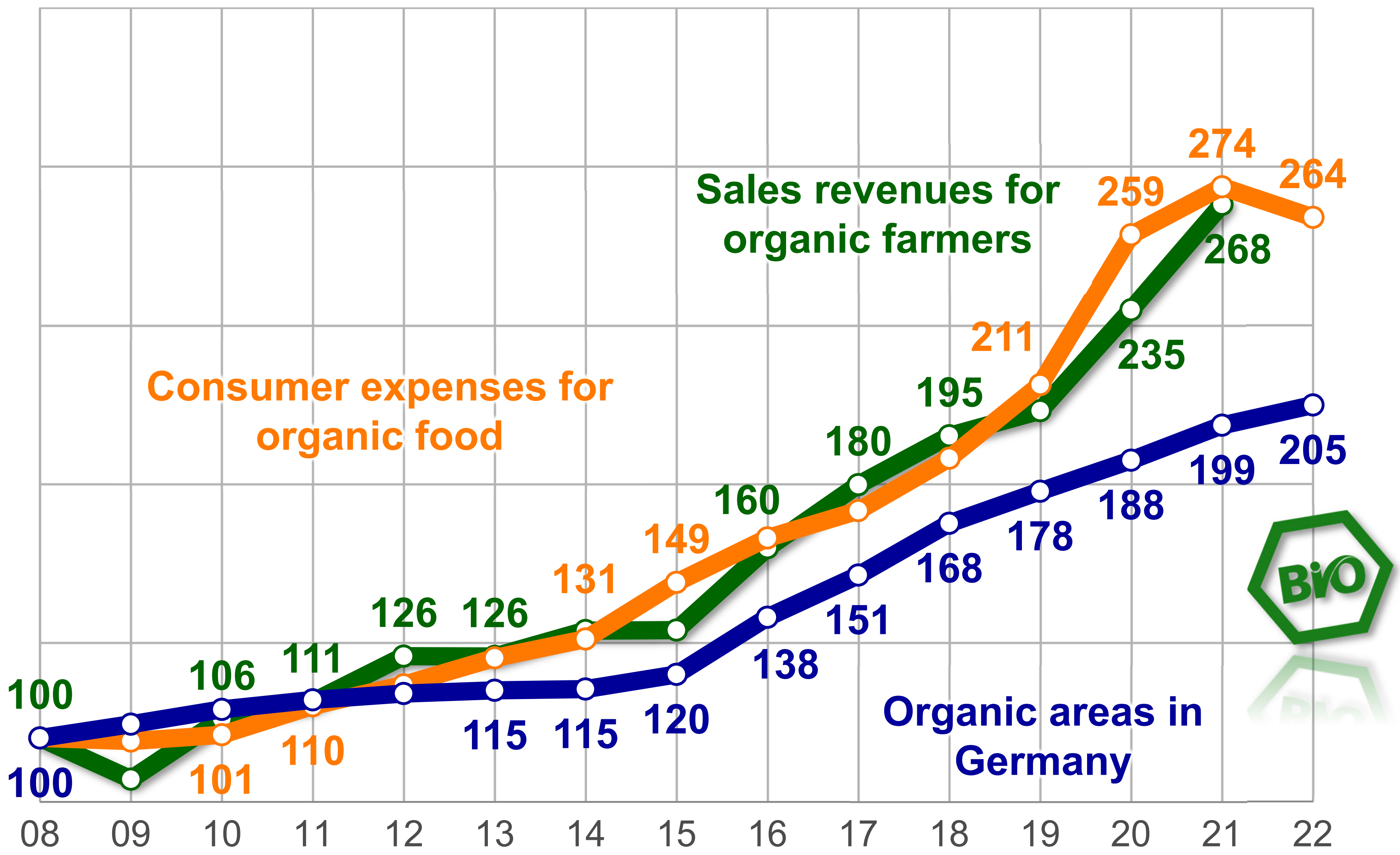


* Monthly values without additional payment.

Source: AMI; BLE

Organic area behind demand and revenues

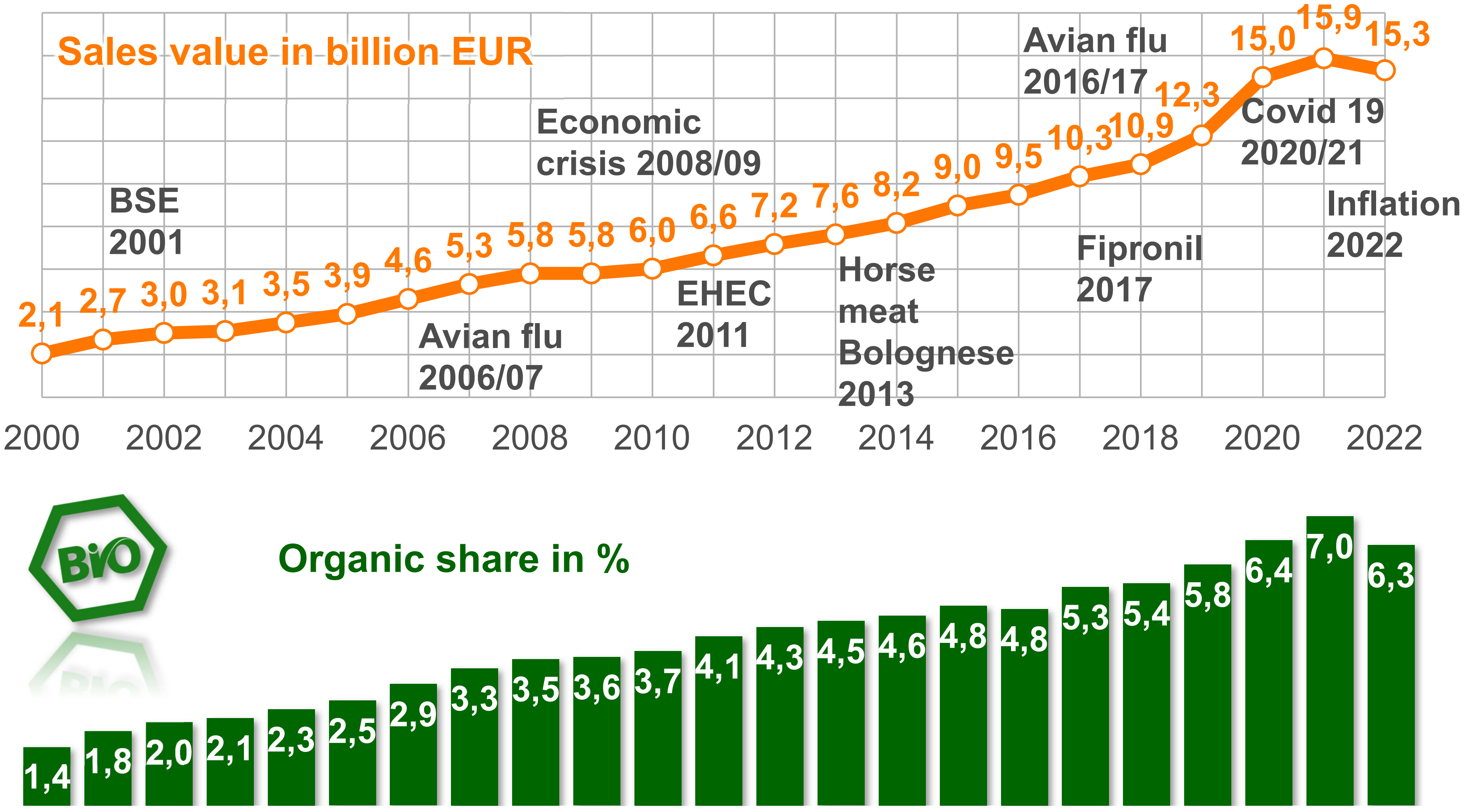
Development of the German organic market, 2008=index 100



Source: AMI, BLE, Arbeitskreis Biomarkt

Organic market share rising until 2021

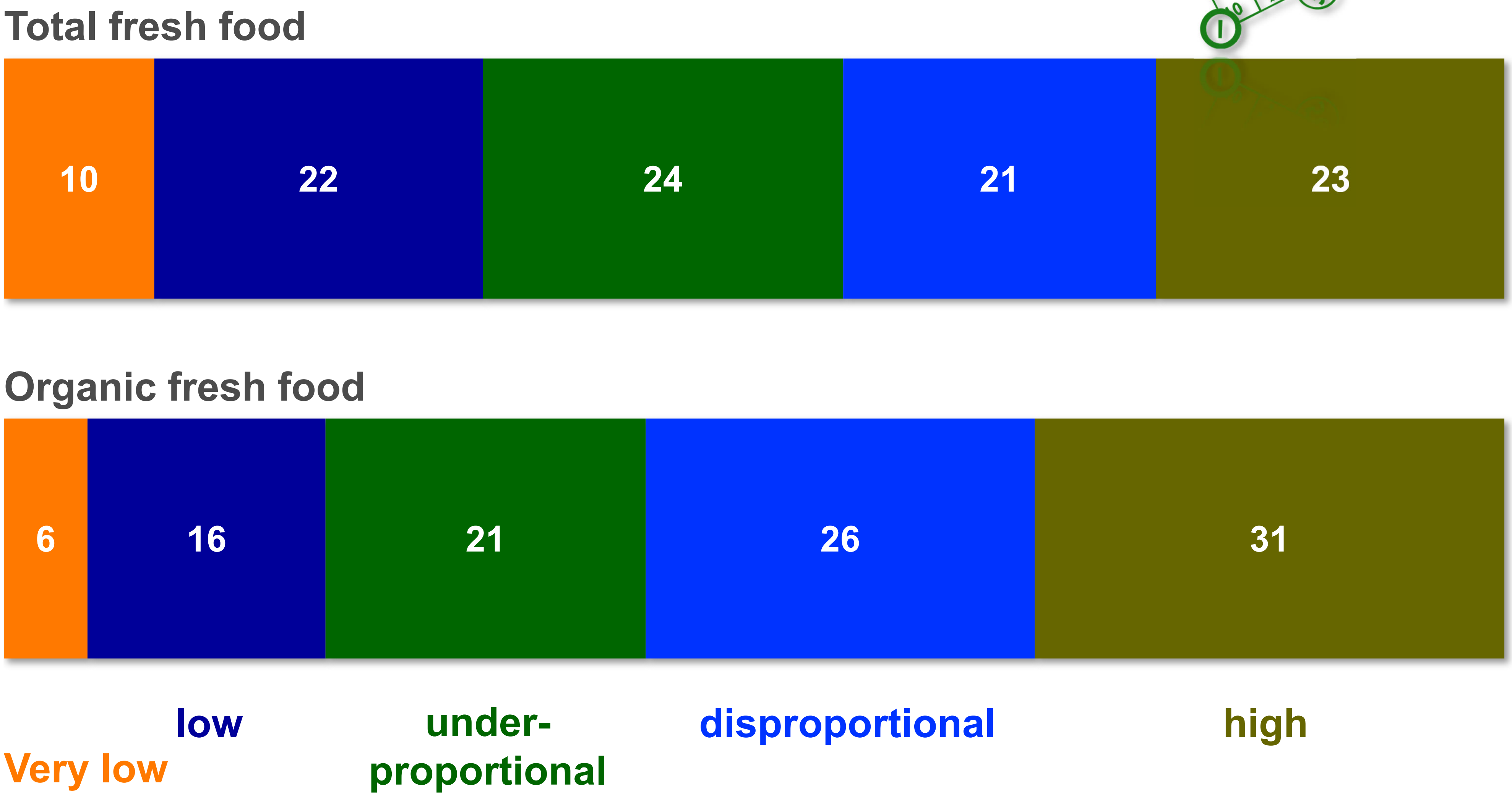
Market Value for organic food and beverages in Germany in billion EUR
and organic share of total food and beverages market, in %



Source: Arbeitskreis Biomarkt, Destatis, AMI

Organic food is a matter of income

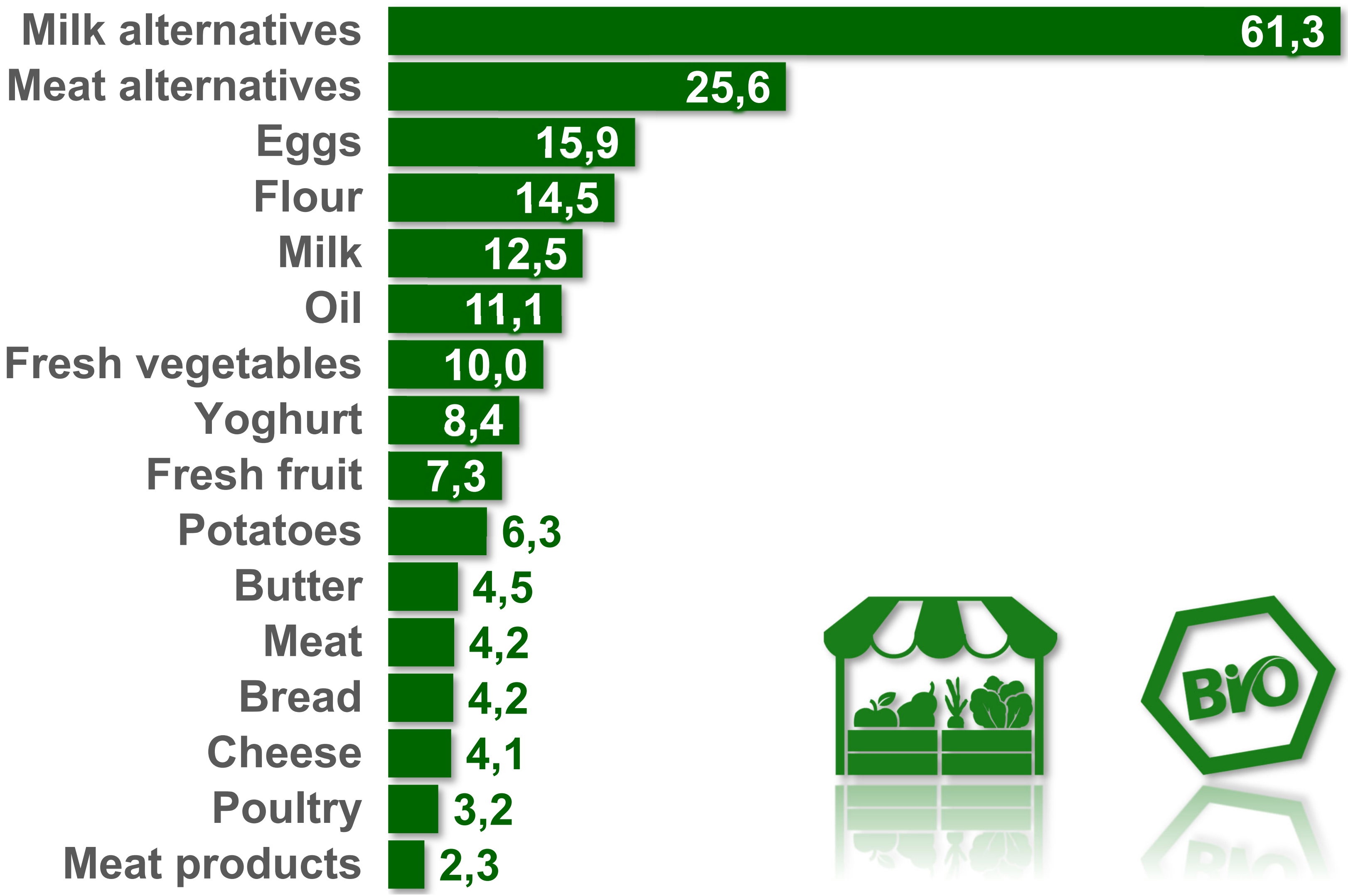
Private consumer expenses in Germany on fresh food, in 2022, by OECD wealth class, in %



Source: AMI according to GfK-Household Panel

Organic shares of fresh food

Share of organic products in total fresh food purchases by private households in Germany, 2022, in %



Source: AMI according to GfK-Household Panel

Conclusions

- Organic market weakens for 1.5 years due to high inflation rates. But this does not mean a turnaround.
- Climate change and the need for a change in agriculture and nutrition continue to be an important part of political decisions – and trade activities.
  - ✓ Public and private sector make efforts in the same direction
- The main thing is organic, but cheap
  - ✓ Discounters benefit – and prices have become more important for purchase decision – Supermarkets in general become even more important
- Processing capacities need to be expanded, which requires capital
- Agricultural production has received the most support and needs to continue to do so as production costs rise.
- Food waste has to be reduced to compensate for the decline in production.
- Organic is a building block in the nutritional turnaround