



# The organic market in Germany - highlights 2016

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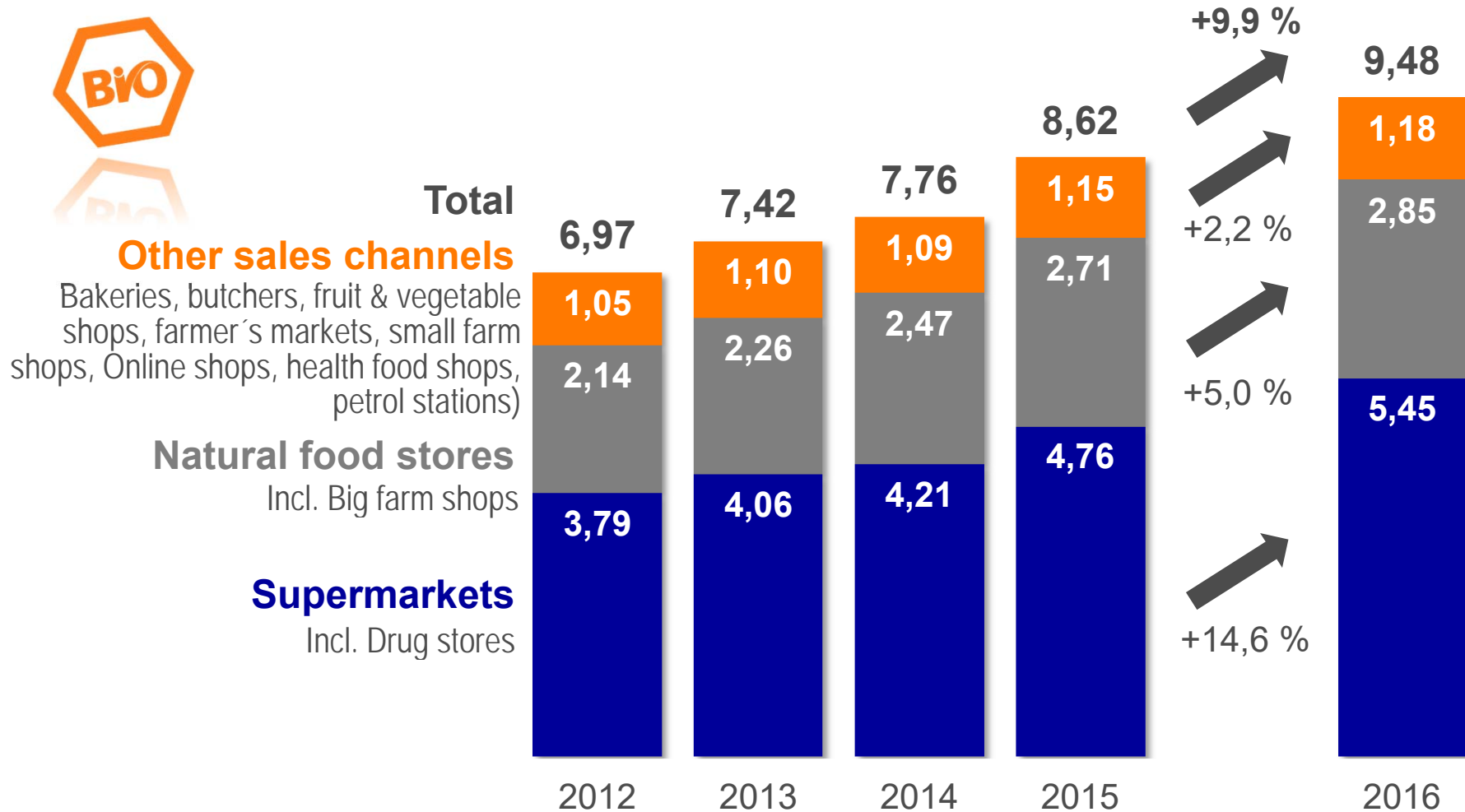
# Highlights of the German Organic market



- Intensive activities of different supermarket chains (especially full range suppliers like Edeka and Rewe) for getting more different organic items in the supermarket shelves
- Natural food stores face bigger competition from the supermarkets – growth has slowed down
- Higher consumer prices for many products – contrary to conventional products (stable level)
- Sourcing of raw material remains the biggest issue for organic suppliers
  - ✓ Small harvests for many crops
  - ✓ Unsufficient supply for milk and eggs, better supply for pork and beef
- Conversion to organic increased significantly
- Imports have been rising but import rates fluctuate
- **MARKET GREW by nearly 10 % in 2016 up to 9.48 billion EUR – 5.0 – 5.1% of the entire food market**

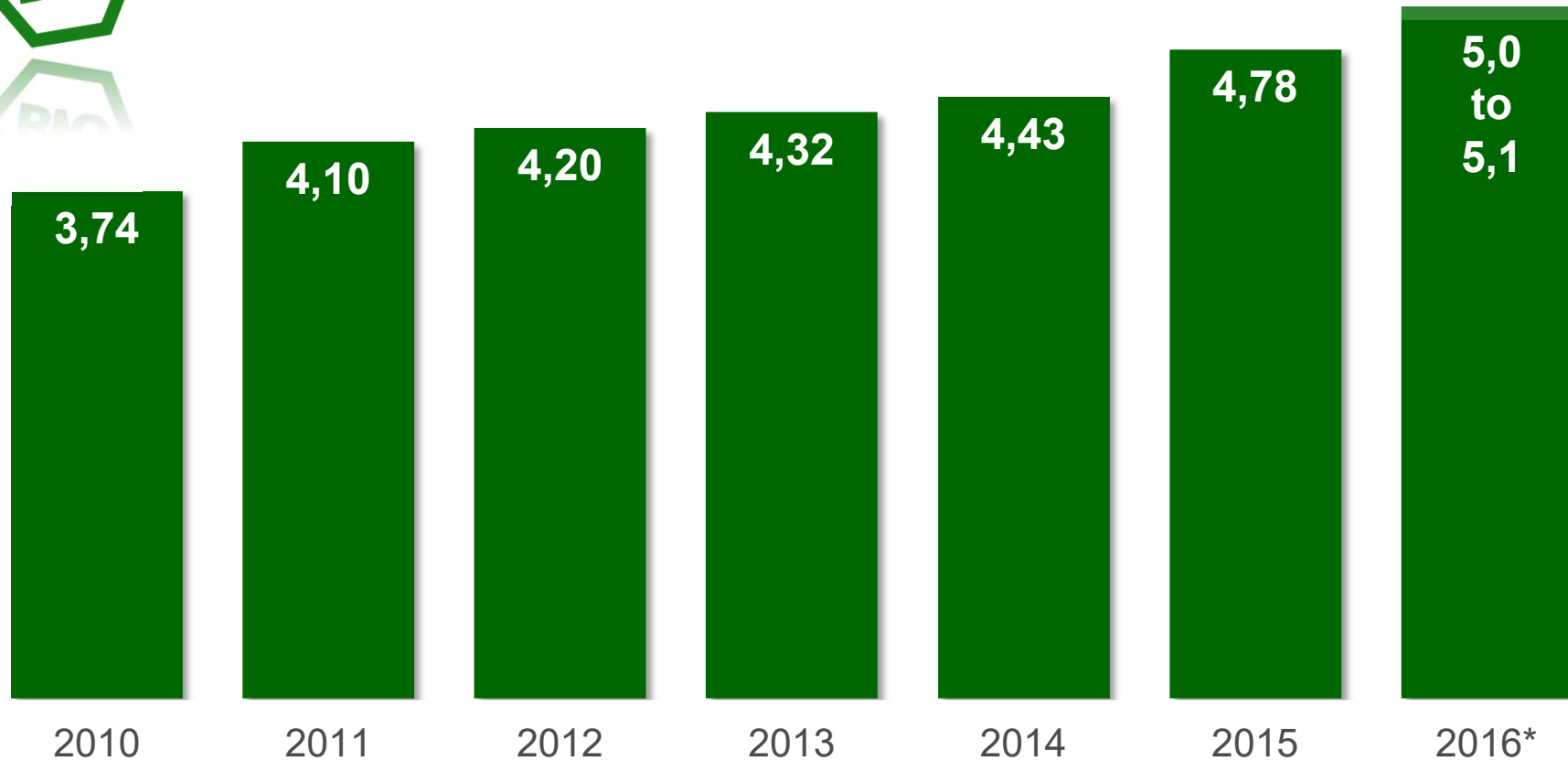
# Organic food sales in Germany

In billion EUR excl. Catering



# Organic shares are rising

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

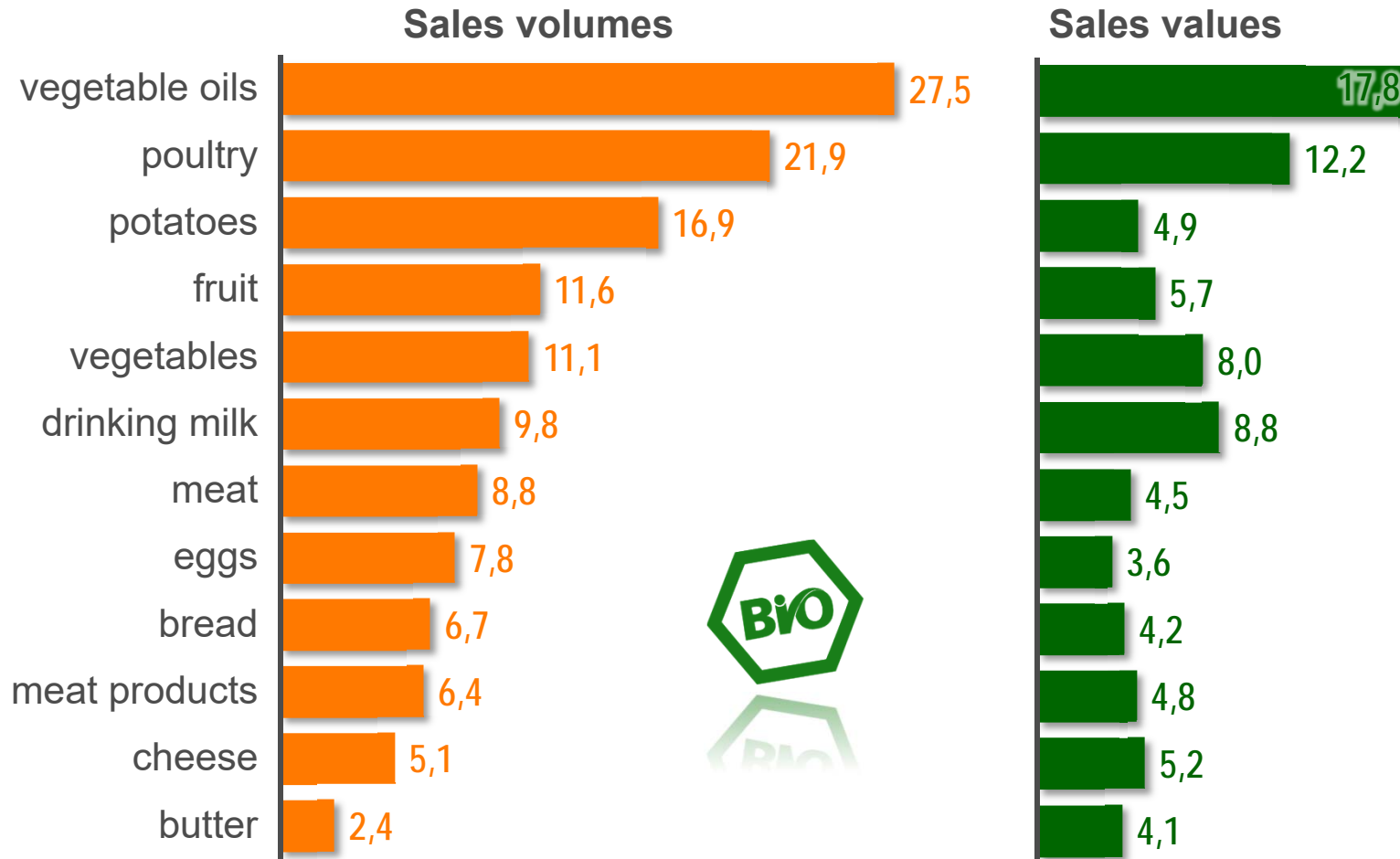


\* Estimation depending on the development of the total food market 2016

# Tops and Flops 2016



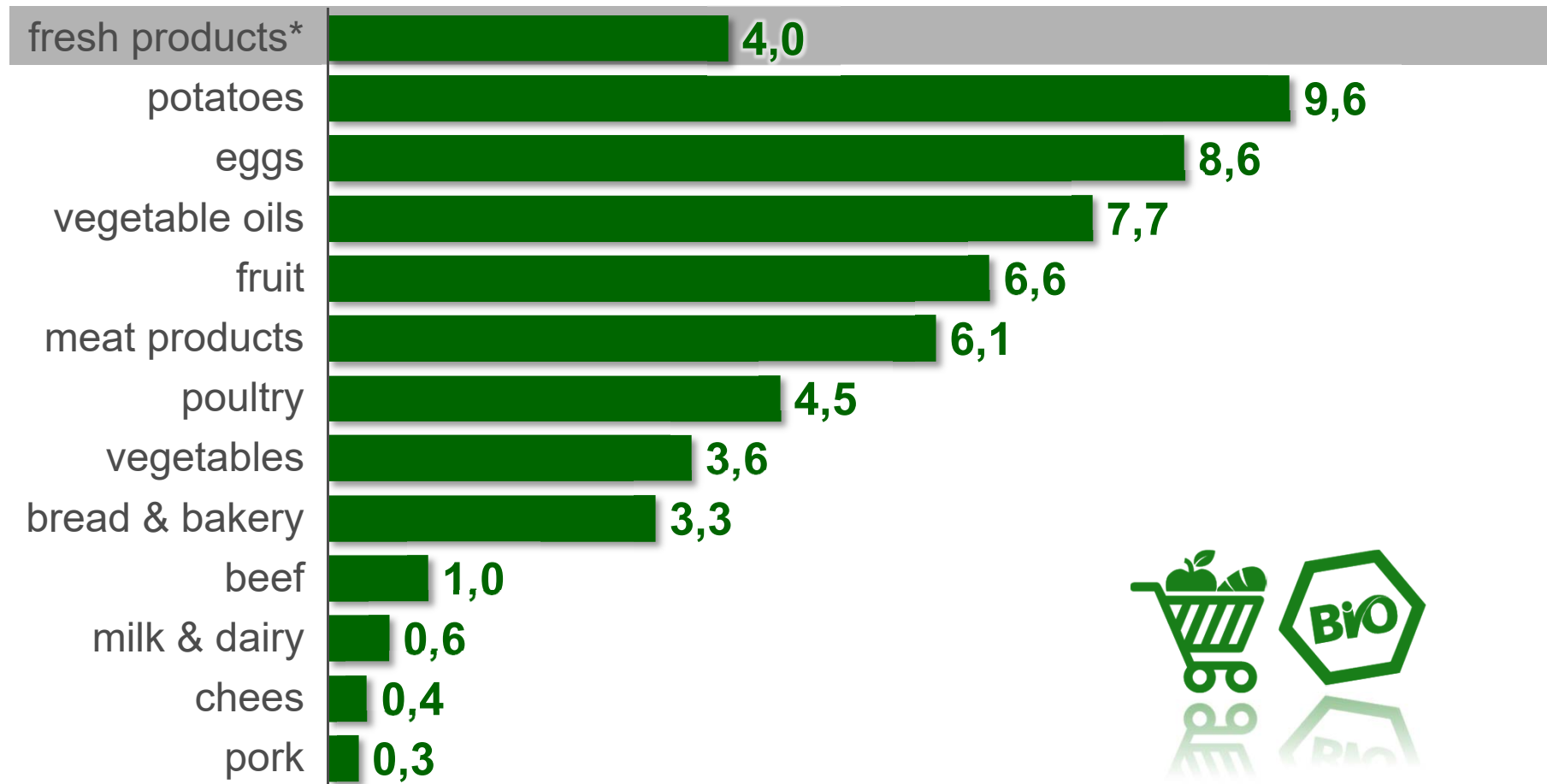
Growth rates of sales volumes and sales values of household purchases in Germany, 2016 vs. 2015 in %



# Consumer prices were rising



Consumer prices for organic fresh products, growth rate 2016 vs 2015, in %

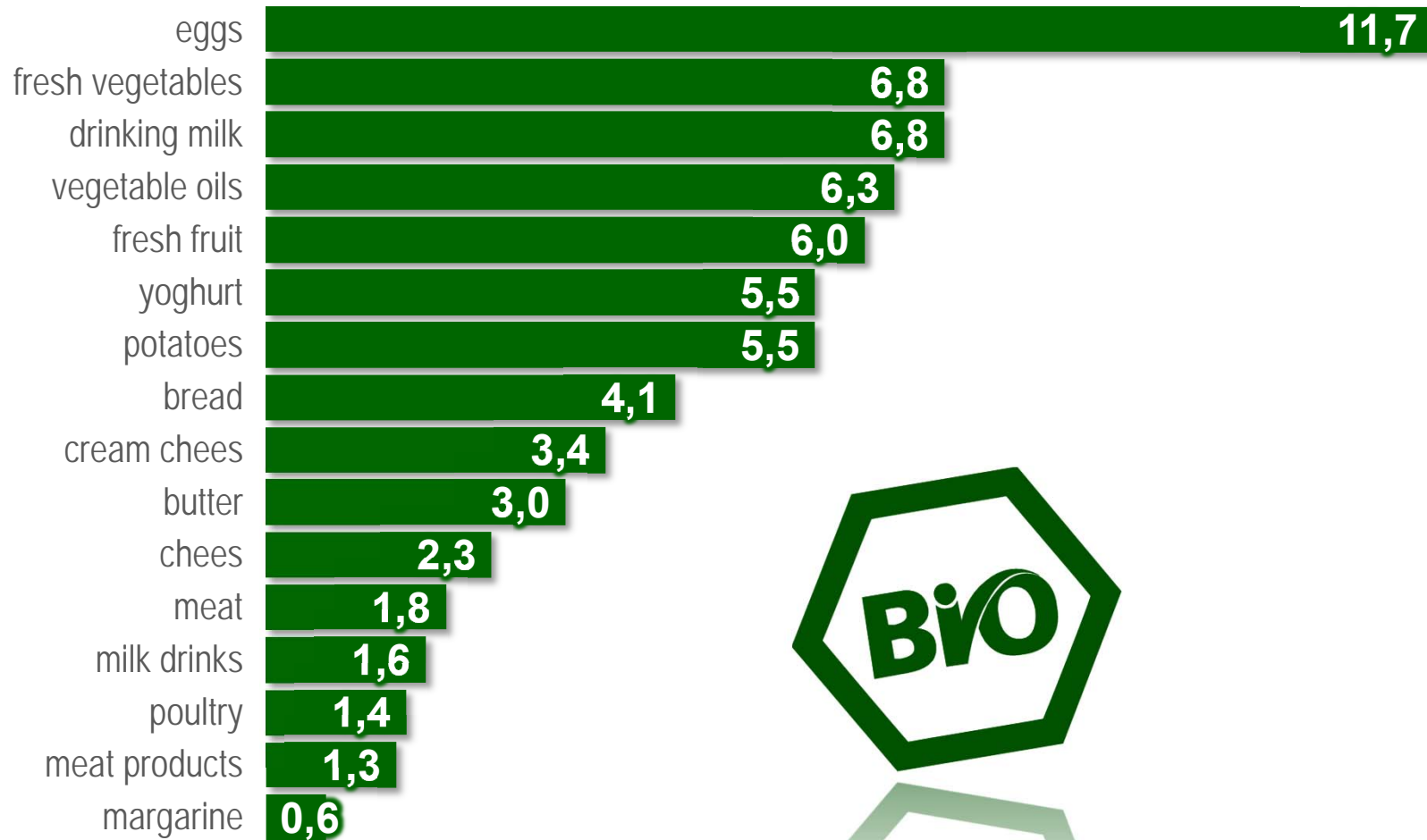


\*Sum of all mentioned organic products

# Organic shares of different products



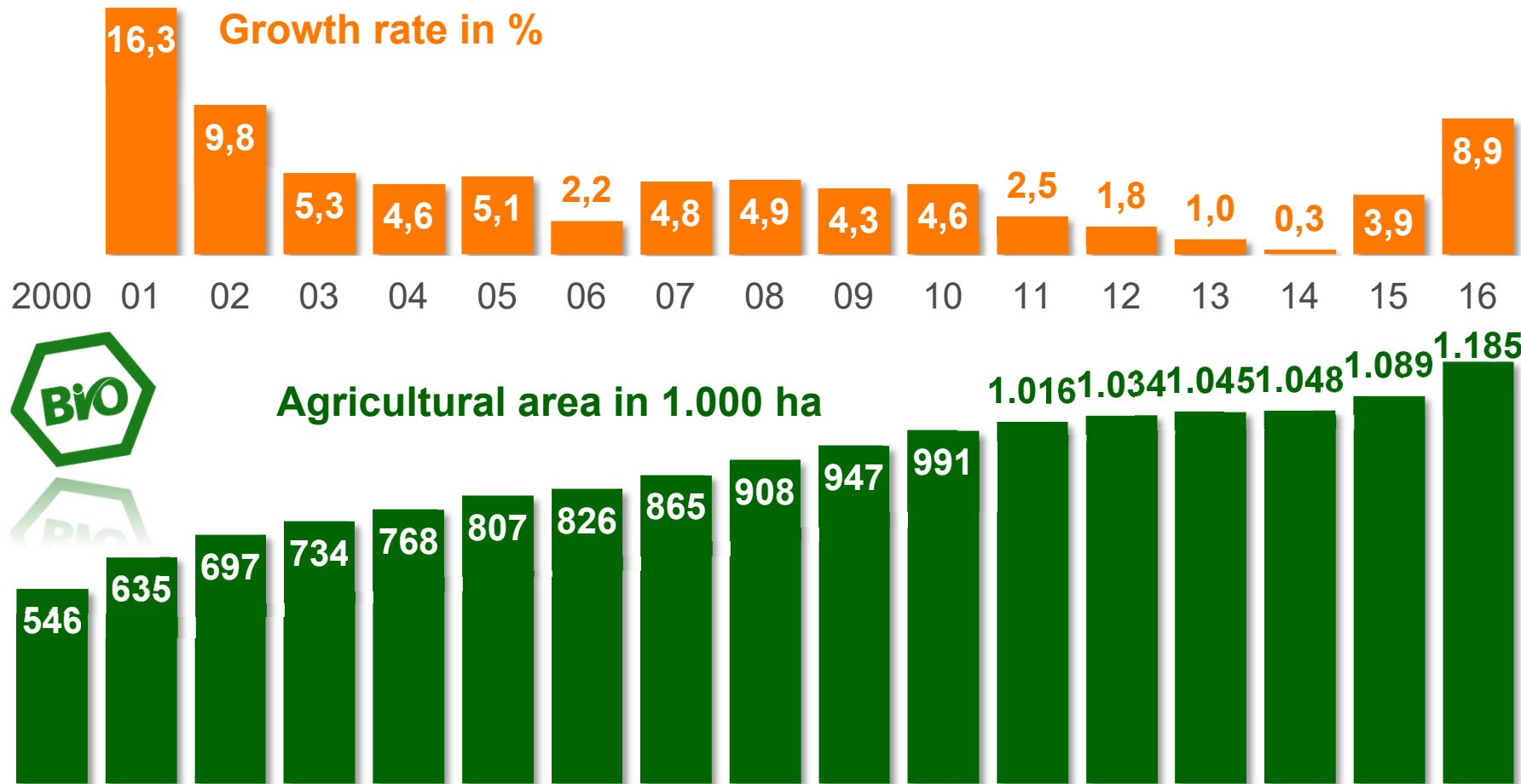
Organic shares of household purchases of fresh products in Germany  
2016, volume shares in %



# Organic Area and growth rate



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

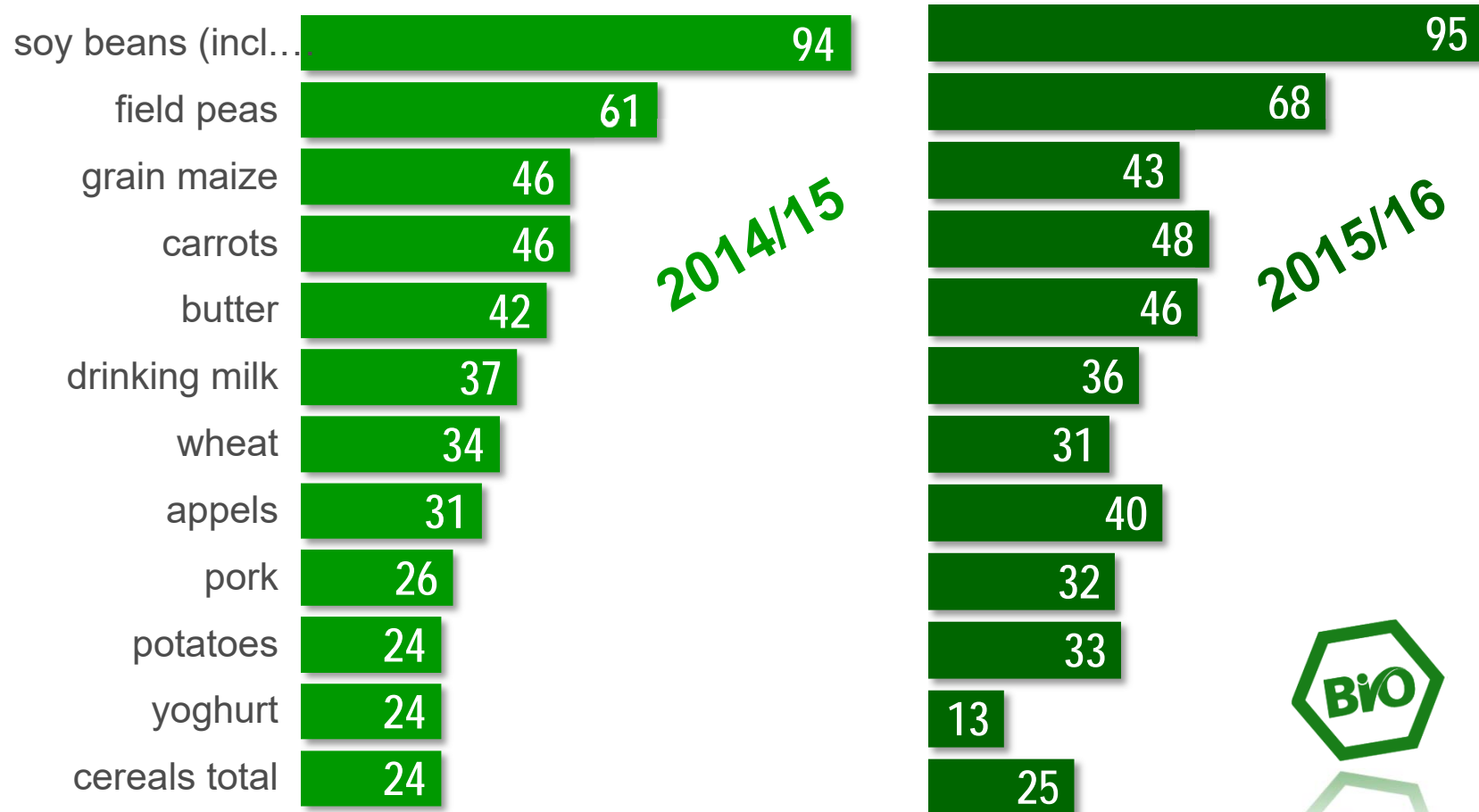




# Import shares have been rising



Import shares of selected organic products, in business years %



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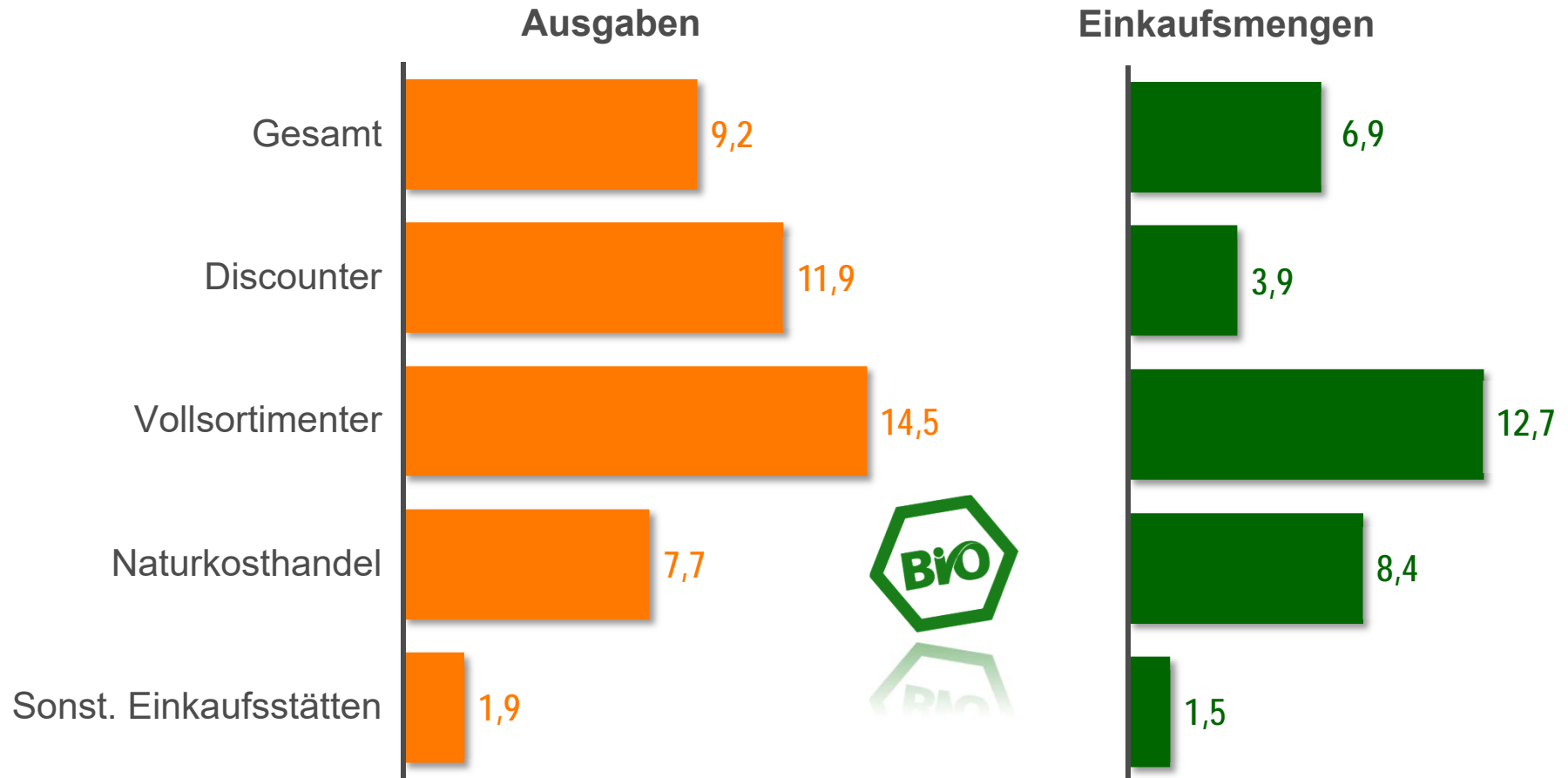


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# Sales of fresh products



Absatz- und Umsatzänderung von Bio-Frischeprodukten\* nach Einkaufsstätten in %, 2016 gegenüber 2015



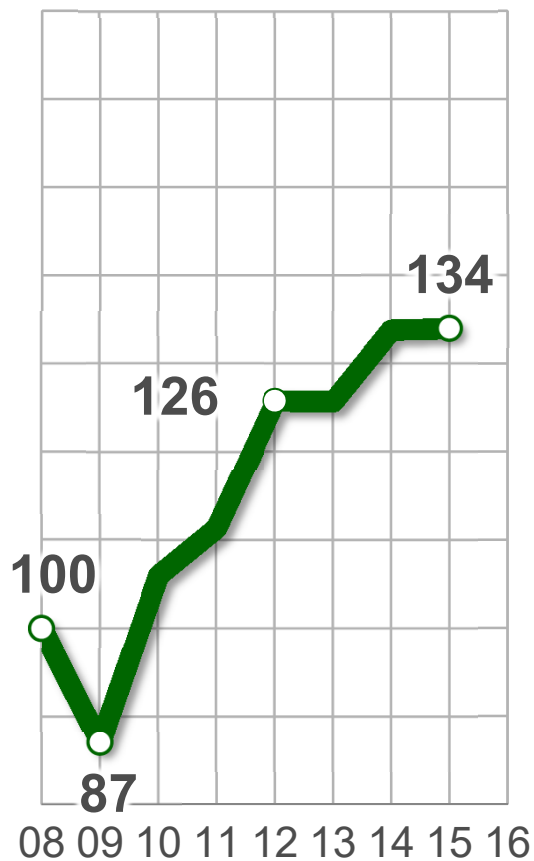
\*Fleisch, Fleischwaren, Geflügel, Eier, Obst, Gemüse, Kartoffeln, Käse, Brot, Backwaren, Milch, Joghurt, Sojadrinks, Mehl, Milchgetränke, Quark, Butter, Speiseöl u.a.

# Bio-Fläche hinkt Nachfrage hinterher

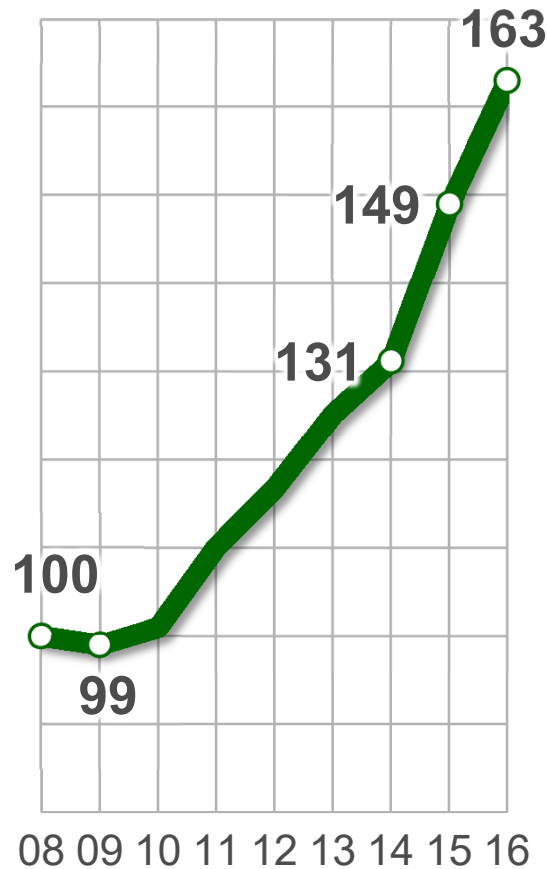


Entwicklung des deutschen Öko-Marktes, 2008=Index 100

### Verkaufserlöse Öko-Landwirte



### Verbraucherausgaben Öko insgesamt



### Öko-Anbauflächen Deutschland

