

The organic market in Germany - highlights 2019



DIANA SCHAACK

AGRICULTURAL MARKET INFORMATION COMPANY (AMI)

12.02.2020, BIOFACH, NÜRNBERG



natürlich informiert.

Highlights 2019



- Both, Supermarkets and Discounters were very active extending their product ranges
- Natural food stores are on the rise again, with bigger volumes and slightly lower prices
- Stable consumer prices for many organic products while conventional products were slightly higher
- Fruit, vegetables and milk/dairy grew most, and also dry assortment grew most
- Growth generally due to higher volumes
- Bigger differences between EU-organic and Organic of the organic associations
- Conversion since 2016 has enlarged the offer of milk, pork, eggs and cereals
- Imports of cereals have decreased with bigger domestic supply
- **Organic Market grew by 9,7 % up to 11,97 billion EUR – approx. 5,7 % organic share of the food market**

Organic food sales in Germany

In billion EUR excl. Catering



Insgesamt

Other sales channels

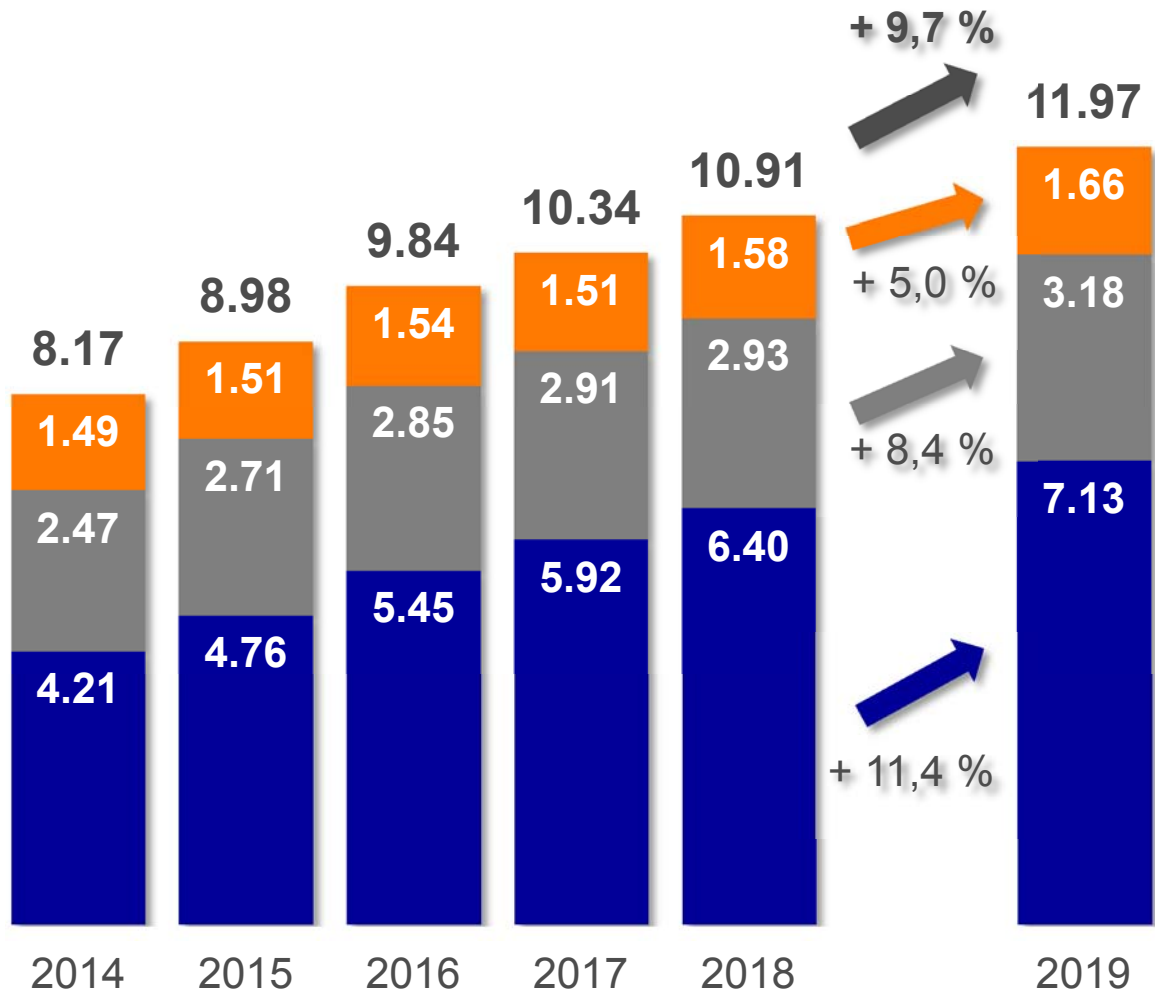
Bakeries, butchers, fruit & vegetable shops, farmer's markets, small farm shops, Online shops, health food shops, petrol stations

Natural food stores

Incl. big farm shops with more than 50,000 EUR additional purchase

Supermarkets

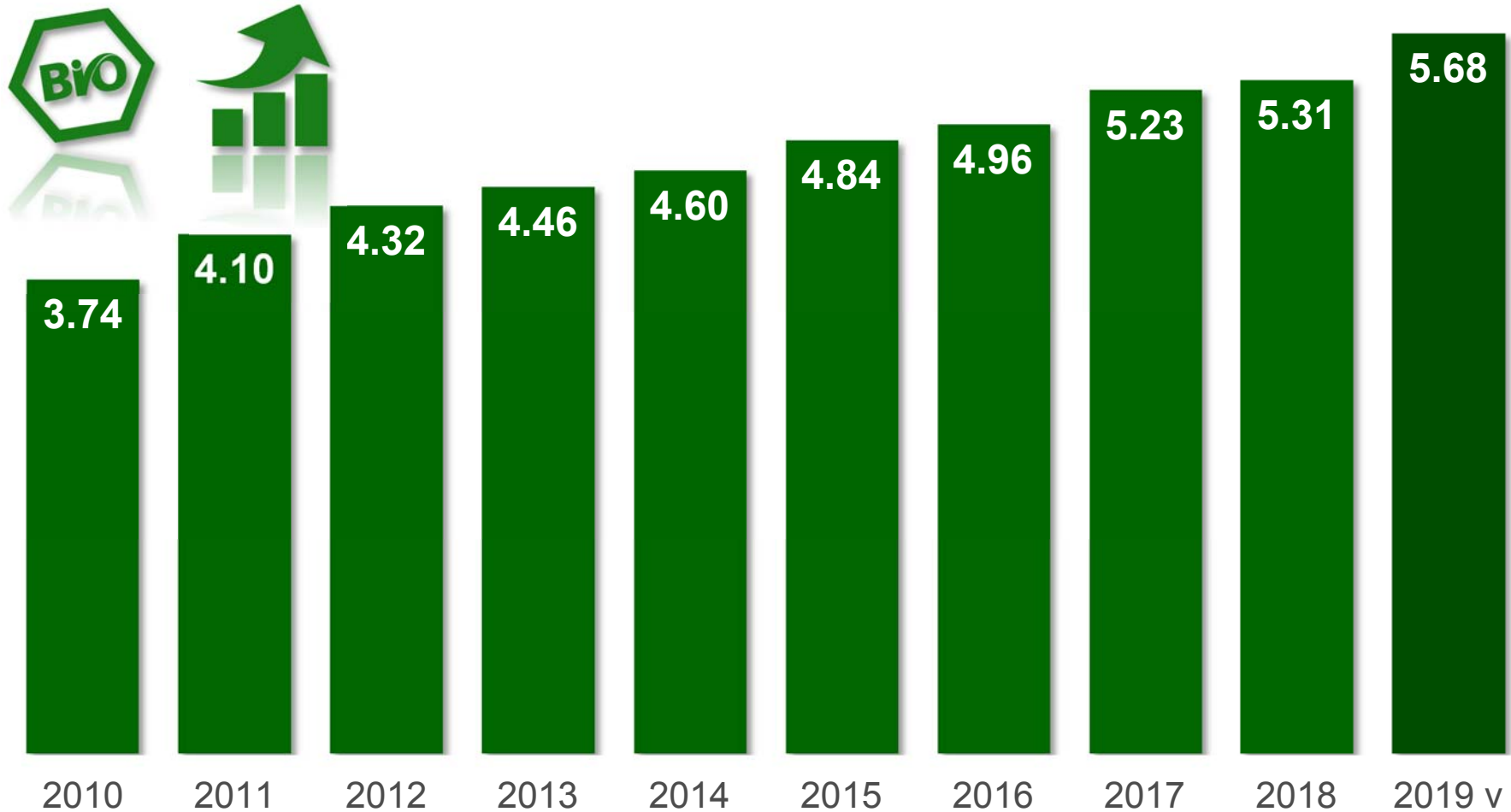
Incl. drug stores



Organic shares are rising



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

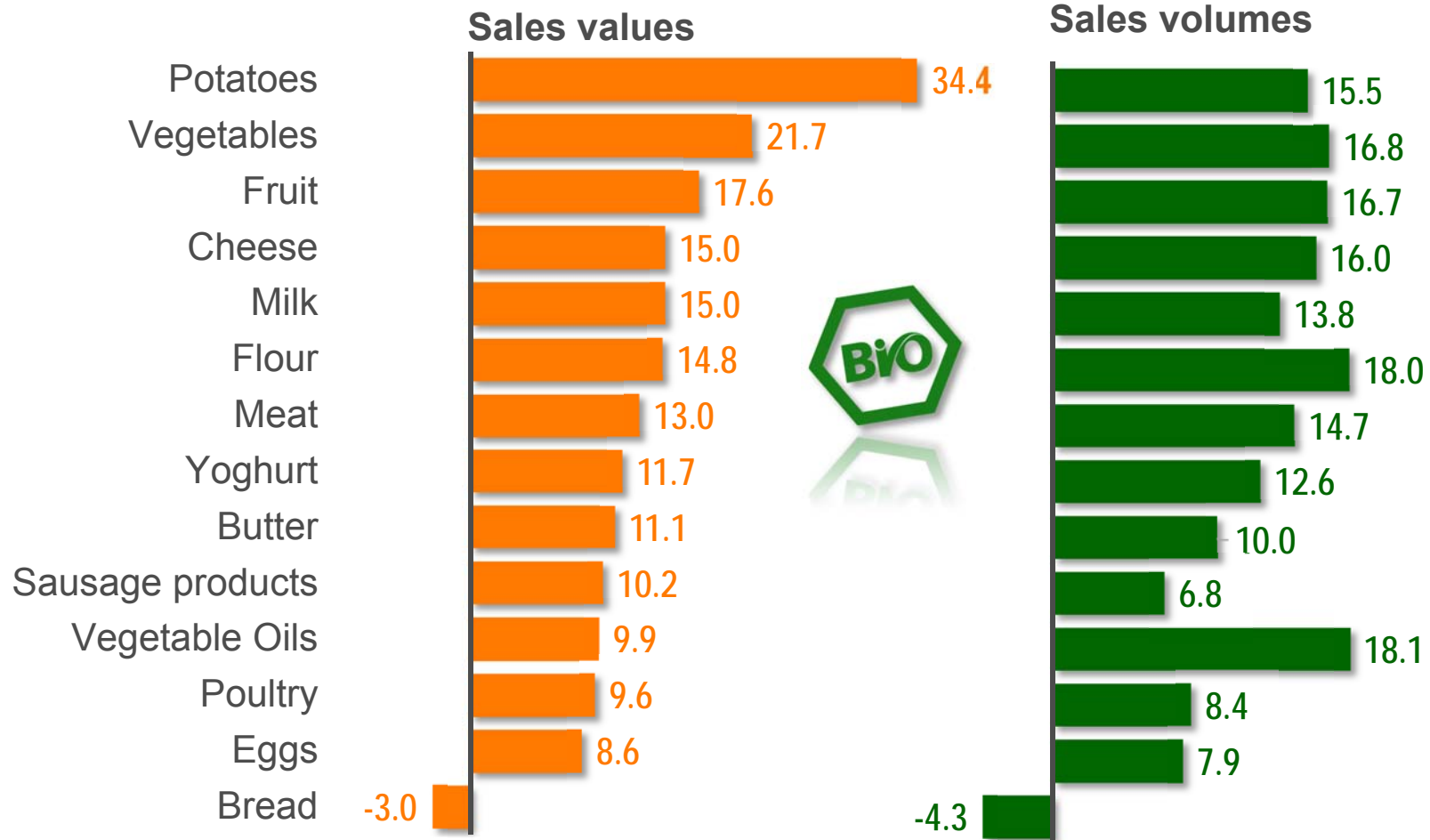


2019: preliminary

Increasing purchases for most products



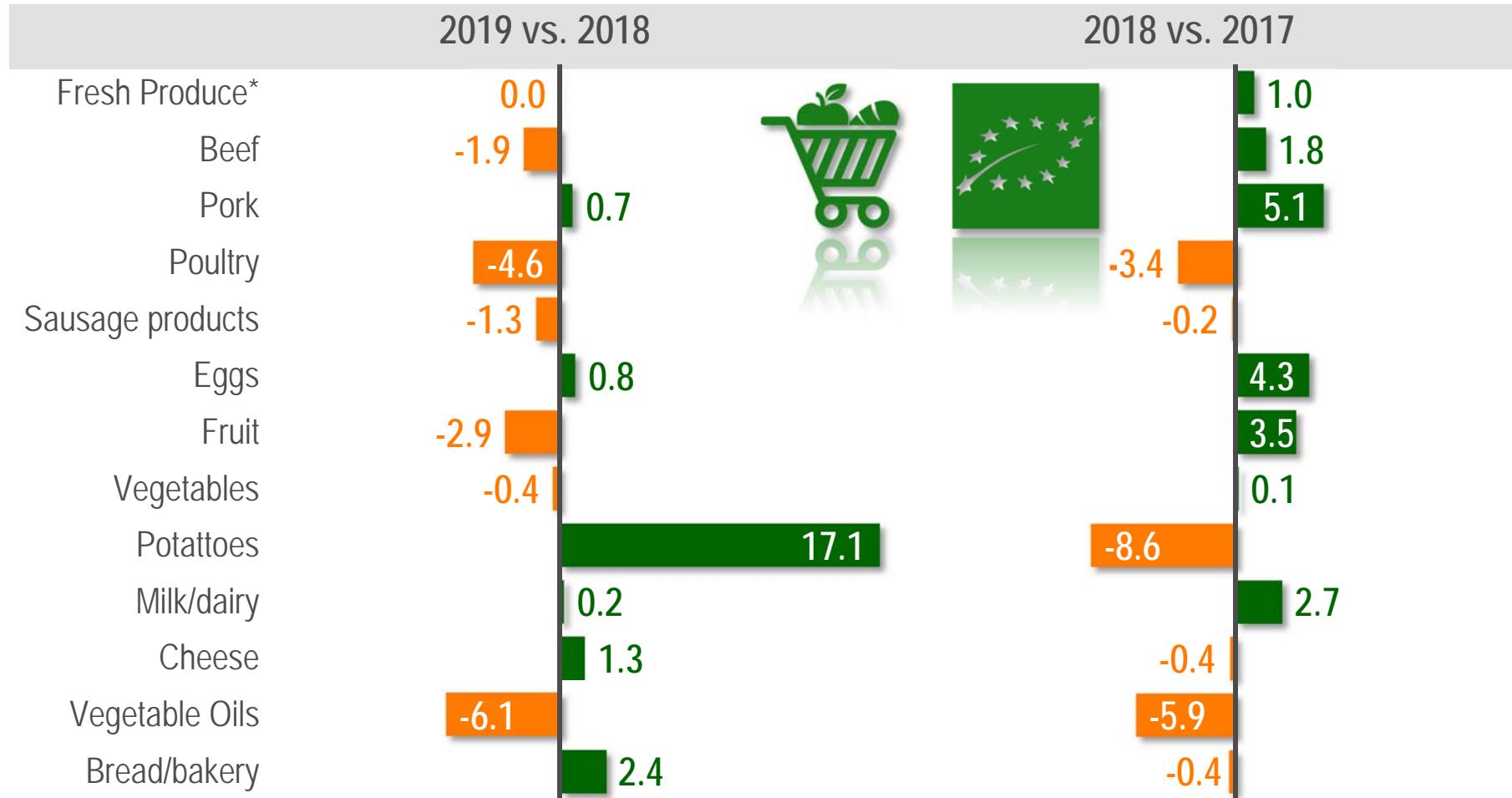
Growth rates of sales volumes and sales values of household purchases in Germany, 2019 vs. 2018 in %



Consumer prices remain stable



Consumer prices for organic fresh products, growth rates, in %

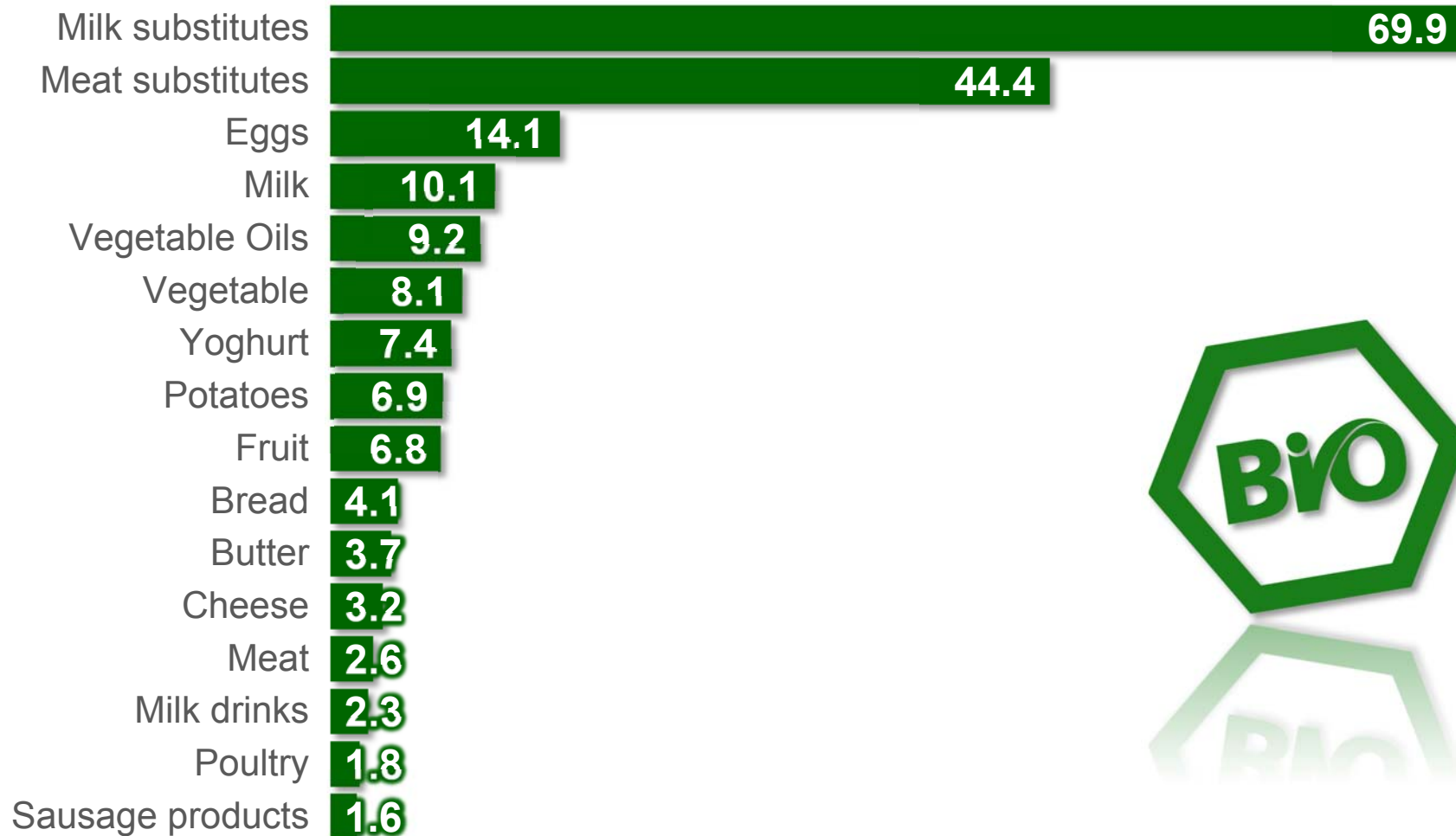


* Sum of all mentioned organic products

Organic shares of different products



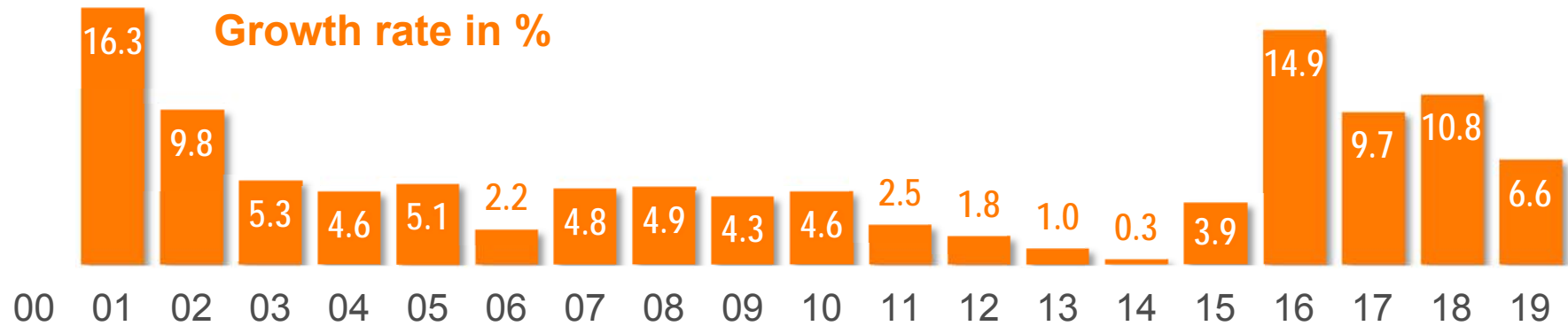
Organic shares of household purchases of fresh products in Germany
2019, volume shares in %



Organic Area and growth rate



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



Agricultural area in 1.000 ha



2019 preliminary

Since 2015 More Arable Land



Organic Production and Growth Rate in Germany 2015 - 2019, in %

Organic Arable

in 1.000 ha



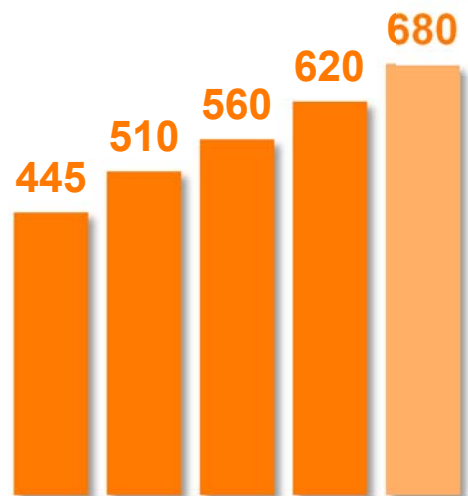
Organic Pork

in 1.000 t carcasse weight



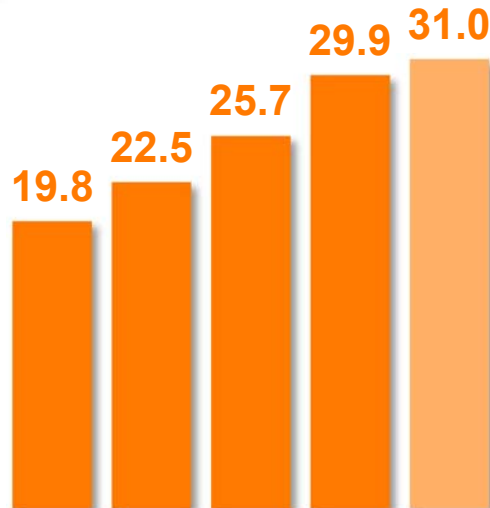
Organic Eggs

in billion pieces

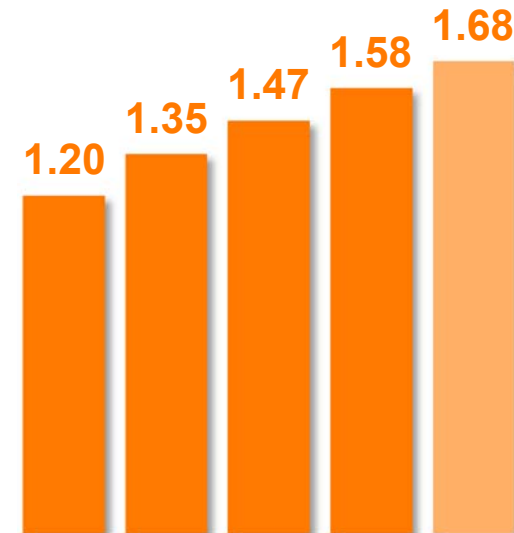


2015 2017 2019*

* 2019 AMI-Estimation



2015 2017 2019*



2015 2017 2019*

Organic Milk production grows most



Organic Production and Growth Rate in Germany 2015 - 2019, in %

Organic Grassland

in 1.000 ha



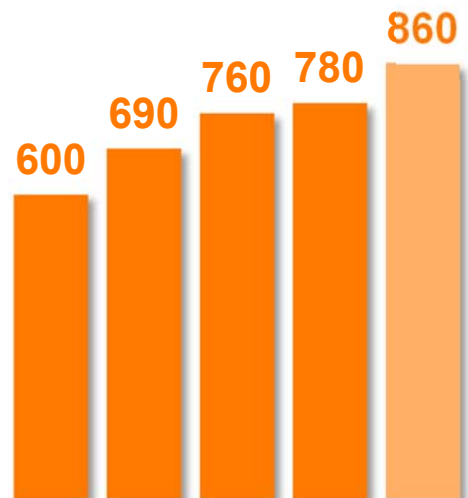
Organic Milk

in million kg



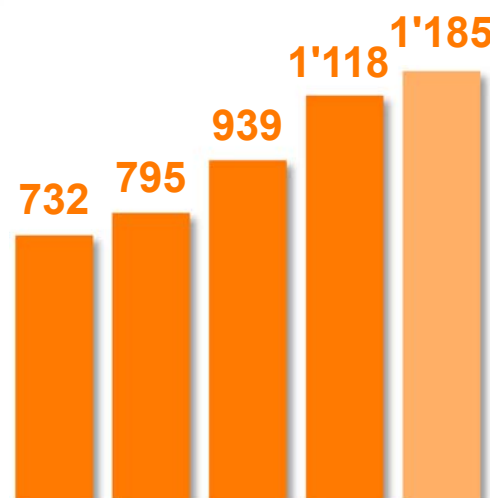
Organic beef

in 1.000 t carcasse weight

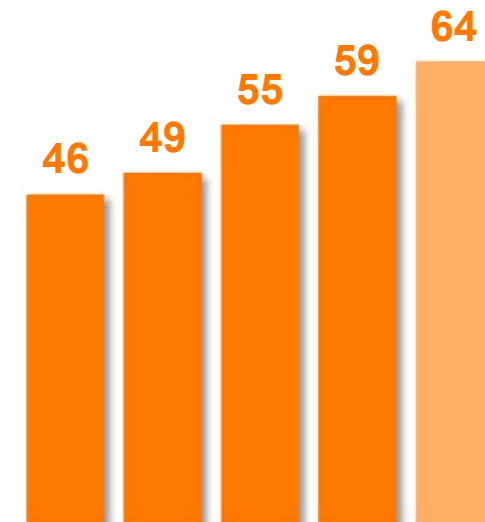


2015 2017 2019*

* 2019 AMI-Schätzung



2015 2017 2019*



2015 2017 2019*

Diana Schaack
Market Analyst

Tel. (0228) 33 80 5-270
Fax (0228) 33 80 5-2270

Diana.Schaack@AMI-informiert.de

AMI Agricultural Market Information Company
Dreizehnmorgenweg 10
53175 Bonn
www.AMI-informiert.de

Die Agrarmarkt Informations-Gesellschaft erstellt unabhängig und übergreifend
aktuelle Fakten und Analysen für das gesamte Agribusiness.



natürlich informiert.