

Specialised Organic Retail Report Europe 2008

Practical Compendium of the Organic Market in 27
European Countries



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Edited by:



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European Countries

See our sponsors Naturland, Biofach and Sonnentor on page 7!

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1 Foreword

Organic farming and organic specialised retail exist since almost a century. The passionate and visionary commitment of farmers, processors, marketers and customers pushed the idea of organic forward. During decades, it was foremost the specialised retail on which the organic market relied upon and that bore the entrepreneurial risk.

Today, organic has spread worldwide. Once confined to direct selling and to the organic specialised retail, organic food items can now, in many countries, be found in any market channel. "Organic goes mainstream" – and the rapid growth brings about paradigmatic change: Organic raw materials are traded globally; huge conventional enterprises have entered the organic market; once tiny organic family businesses develop into international holdings.

In this period of change, market actors need both sound foundations and clear perspectives for their future development.

The present report enables clearer, easier decision-making on all the levels of the organic market, by presenting new and pioneer data and information. It shows the interdependencies between market actors, be they specialised retailers, international supermarket chains, wholesalers or suppliers. The report delivers, as well, information on underlying tendencies and shows how "organic" may develop in the future: organic might turn more regional, more fair-trade, more climate-friendly... it is in the very nature of the organic concept that it will always try to improve itself.

When looking at all the different markets in Europe we see how vivid the organic idea is. We see conventional retailers stepping into organic domains and simultaneously, we detect the unbroken strength of the specialised organic retail. It's still the specialised organic retail which is the breeding ground for the organic market development; it is the specialised retail which brings organics closer to consumers.

The organic way to produce and market food evidentiary embodies the idealistic and realistic vision of a food and agriculture system, which is working economically in harmony with nature and which provides top quality and healthy food. That's why customers love organic. And that's why our century will be more and more organic.

Organic food is simply the best food we can imagine – if you are into organics, we envision our study to contribute to your success.

Susan van Osch (Sustainable Marketing)

Dr. Burkhard Schaer (ECOZEPT GbR)

2 Acknowledgements

We want to thank our sponsors Naturland, Biofach and Sonnentor (see page 7 f) for their financial support which enabled this report.

17 Co-authors and many local experts helped us by writing, giving interviews and delivering data – we thank them for their cooperation.

3 Limits of this study

The present study is a cooperative pioneer work of a network of authors. We believe that, thanks to the efforts of all the co-authors, we present herewith the most reliable and most up-to-date information on the different organic markets. Nonetheless, data on this rapidly developing sector are generally hard to find and often based on estimations. We are grateful for any of your critical remarks, which will help us to improve our future work.


4 Editors

Susan van Osch – Sustainable Marketing

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ORA is an IFOAM Internal Body and a global umbrella organisation of the organic retailers and their associations. ORA supports the organic trade worldwide, establishes international networks, ties up the know-how and develops standards for organic trade education. Report Coordinator Susan van Osch is affiliated to ORA with her company „Sustainable Marketing“.

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As a private market research agency ECOZEPT is specialised on food marketing. We work in close co-operation with universities, public administrations, NGOs and private enterprises of the food-branch.

ECOZEPT provides intelligence services, market research and marketing concepts for sustainable food products.

5 Sponsors



Naturland Association for Organic Agriculture

Naturland is active worldwide

Naturland is committed to the highest standards of quality and positions itself as a quality-conscious brand which acknowledges its social responsibilities and demonstrates organic proficiency.

For twentyfive years now, Naturland has been a leader in organic agriculture not only in Germany but also in many other regions of the world. The first-ever conversion of tea gardens in Sri Lanka and India to organic agriculture was just the start of further successful activities on a global level.

Our quality standards are making their mark

Today, over 49 000 farmers are growing food in compliance with Naturland's internationally recognised standards. Besides this, we were the first organic association to have introduced social standards applicable to all member farms. Indeed, Naturland regards organic expertise and social responsibility as two sides of the same coin.

Our quality standards are much more stringent than those of the European Union, which is why we enjoy the consumers' complete confidence.

Our motto is organic + fair

A good 90% of Naturland's international members are organized in grower groups. Access to the organic market, combined with fair prices, helps smallholders to improve their living conditions. In co-operation with fair-trade partners, we combine organic + fair into one inseparable unit. This is the way into the future.

Certification by Naturland is recognised worldwide and accredited to the requirements of IFOAM, the International Federation of Organic Agriculture Movements, and according to the European norm EN 45011/ISO 65. Accreditation confirms the high level of quality and creates confidence.

Would you like to learn more about Naturland?

On our website you can find interesting facts about our standards and our quality approach. Producers and Processors will get to know the steps to Naturland certification and relevant information and news. The website is available in English, Spanish and German.

More interesting facts about our work:

www.naturland.de www.bio-mit-gesicht.de



Sonnentor Kräuterhandels GmbH

In 1988, SONNENTOR Kräuterhandels GmbH was founded by Johannes Gutmann in a rural area in Austria called Waldviertel. SONNENTOR's business based on the idea to collect local organic farmers' specialities such as tea and seasoning herbs and sugar free fruit spreads and to market them nationally and internationally under the logo with the laughing sun.

A substantial characteristic of the company's business is the processing of raw materials right on the farms where they are grown, in order to enable smaller farms to survive, to utilize the expertise and conscientiousness of the farmers in order to accomplish the highest quality and traceability. Acting upon sustainable principles and respectfully towards rhythms of nature is the core of the company's philosophy.

Today SONNENTOR specialties are available in 43 countries worldwide. The company's export activities run from Europe to Canada, Asia, Australia and New Zealand.

Further information is available at www.sonnentor.com.



BioFach, the World Organic Trade Fair, is distinguished by its vigour, internationality and innovative power. In liaison with Vivanness, World Trade Fair for Natural Cosmetics and Wellness, it brings together more than 2,700 exhibitors - two thirds from abroad - and approximately 46.000 trade visitors from over 120 countries of the world to Nuremberg every year in February. BioFach under the patronage of IFOAM (International Federation of Organic Agriculture Movements) applies strict admission criteria to guarantee the constantly high quality of the products on display. BioFach is present on four continents with its own events in Japan, the United States, South Africa and China.

Further information is available at www.biofach.de.