2025 EUROPEAN ORGANIC CONGRESS

STRENGTHENING ORGANIC ROOTS FOR A COMPETITIVE AND SUSTAINABLE 2050

25-27 JUNE **WARSAW, POLAND**

#EUorganic2030 #EOC2025

European Organic Markets Developments

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Market performances

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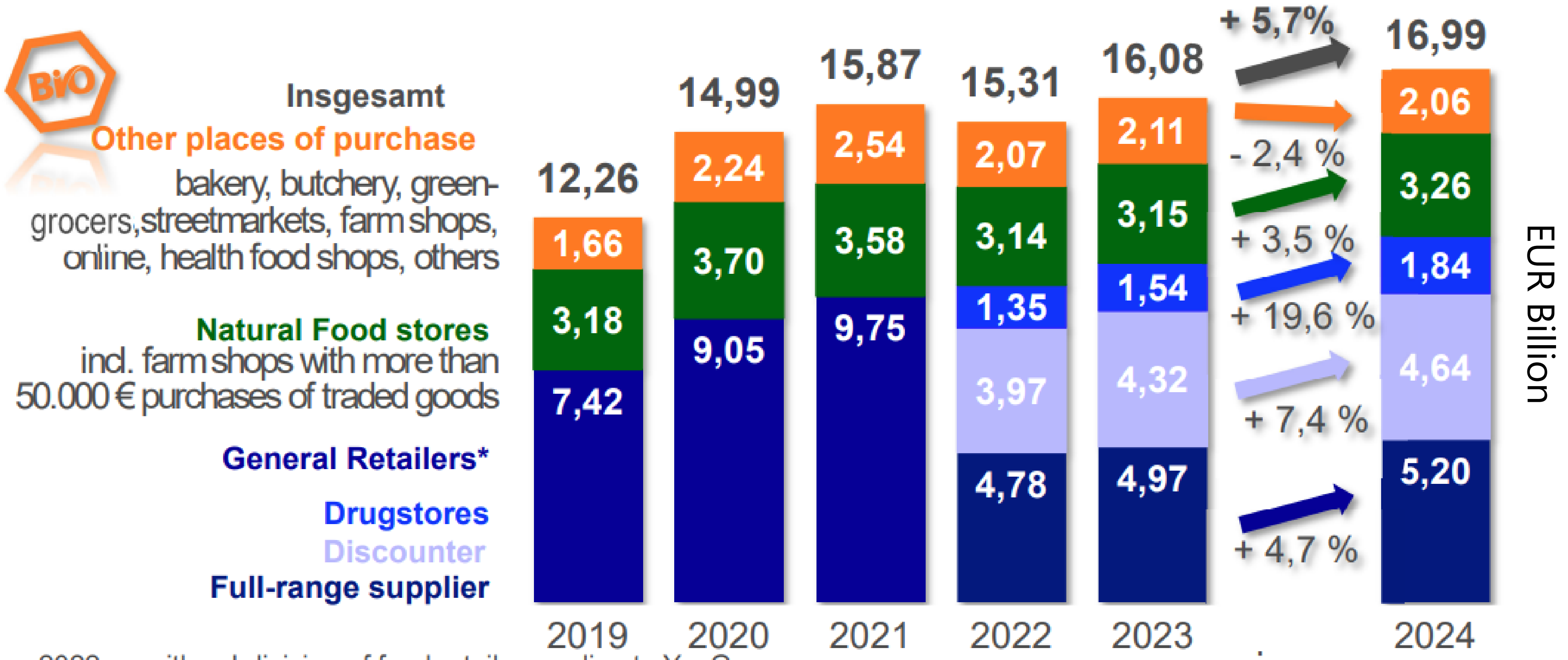
Germany Value increased 5.7% and share by 0.2%

Volumes increasing in most categories

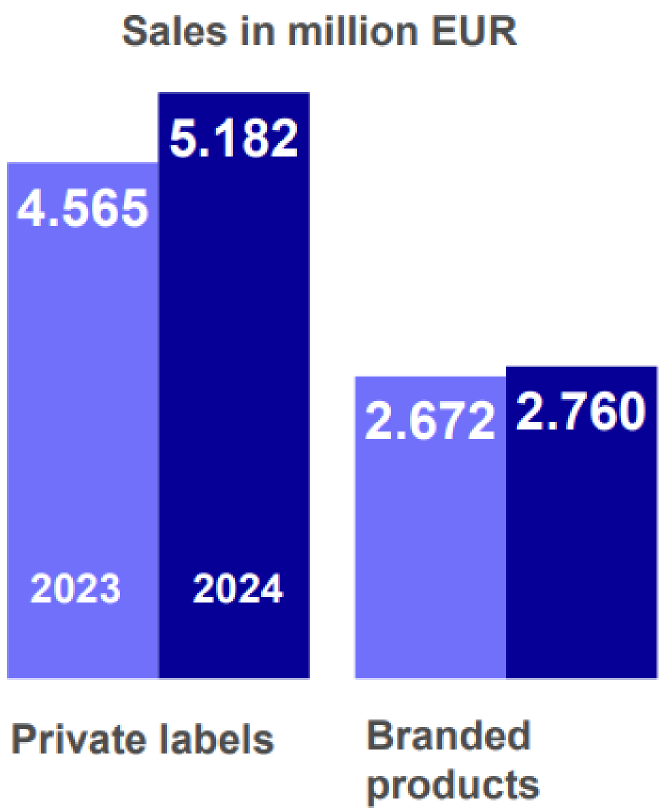
Little inflation in organic (+0.9%) or non-org food (-0.5%)



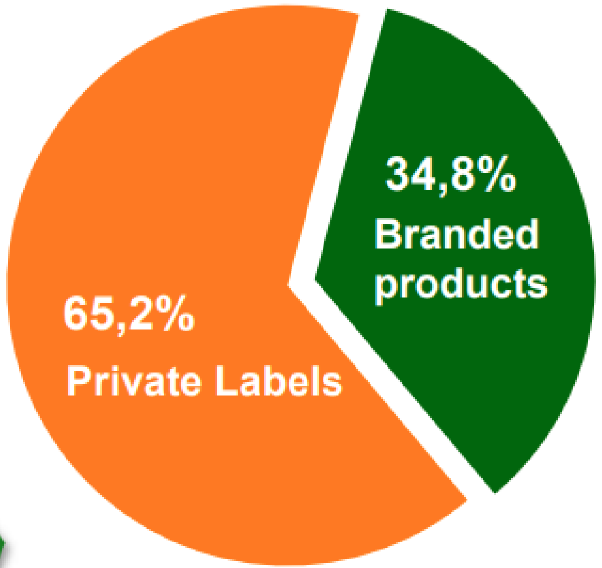
*from 2022 on with subdivision of food retail according to YouGov

Source: Arbeitskreis Biomarkt, Statistisches Bundesamt, AMI

Private Label continues to take more share



- ✓ Organic food private labels increase sales by a strong 13.5%, while growth in branded products is significantly lower at +3.3%.
- ✓ As a result, the share of branded products continues to fall to currently 34.8%



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France Returning to growth after inflationary impacts

Home consumption of organic (value) has increased +**0.8%** in 2024

Dedicated organic, independents/artisan stores and direct sales, saw **+7%,**

Large distribution showed a continue to see declines **(-5%)** as availability becomes more limited

	Bio à domicile	Bio en restauration hors domicile	
	Grande distribution Magasins bio spécialisés Vente directe Artisanat / Commerçants	Restauration collective	Restauration commerciale
Valeur au stade de gros HT	**8,117 Mds €** 8,054 Mds € (Valeur 2023)	**0,501 Mds €** 0,484 Mds € (valeur 2023)	**0,325 Mds €** 0,302 Mds € (valeur 2023)
		0,826 Mds €	
Évolution 2024 vs 2023	+0,8%	+3,3%	+7,7%
Évolution 2023 vs 2022	0%	+9%	+12%

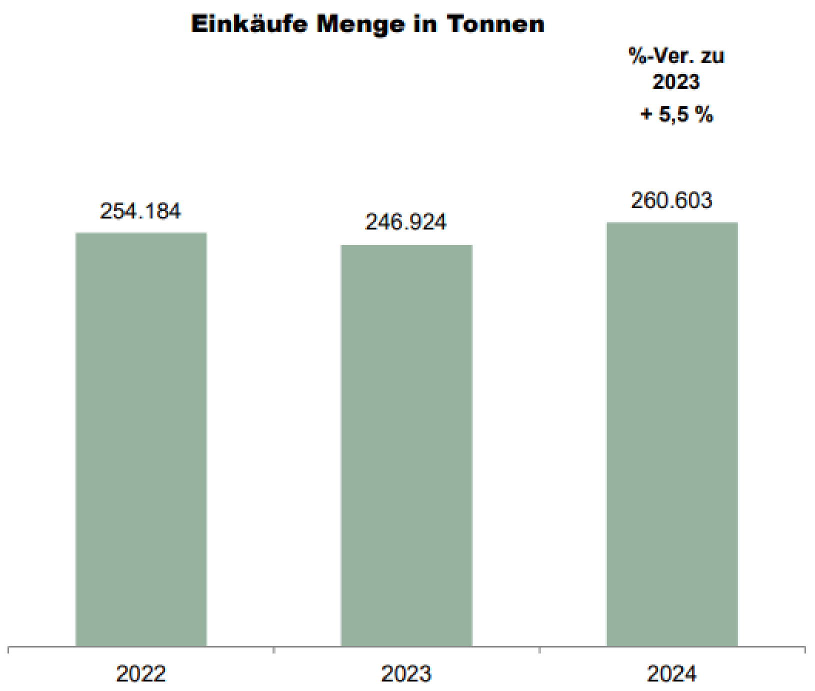
Source : Agence BIO / AND-i

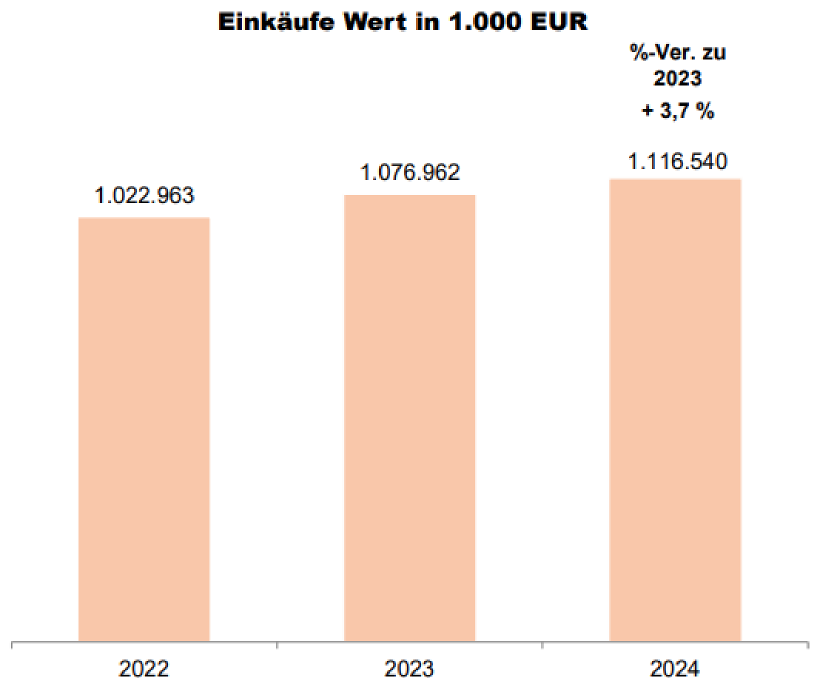
Austria Modest growth in volume and value in 2024

Volume share is up 0.5% to 2022 levels ,

Value share is unchanged from 2023

Entire market closer to 3 billion EUR





AGRARMARKT AUSTRIA MARKETING

* Alle RollAMA-Warengruppen: Weiße und Bunte Palette, Käse, Gelbe Fette, Fleisch & Geflügel, Wurst & Schinken, Frisch-/TK-/Sterilobst & -gemüse, Eier, Fertiggerichte, Backwaren und Mehl, pflanzliche Alternativen

Quelle: © RollAMA/AMA-Marketing, Feldarbeit: YouGov Shopper Panel / Auswertung: KeyQuest Marktforschung

RollAMA ROLLIERENDE AGRARMARKT-ANALYSE

Both frequency and intensity of bio shop is increasing by approx. 3%

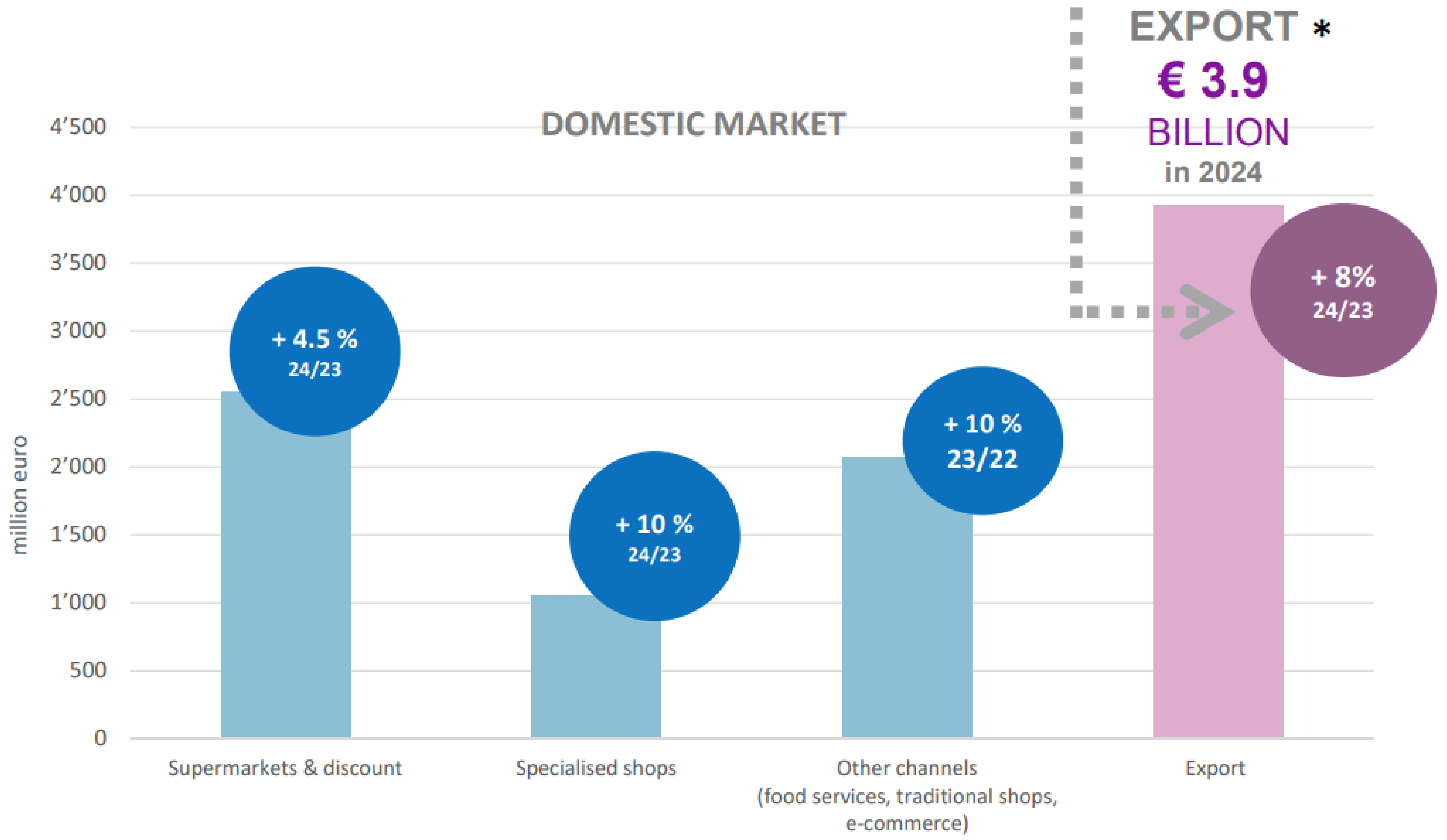
Netherlands Approaches double-digit growth

- In 2024, the turnover of organic products in the total retail sector* grew by **9.6%** to €1.77 billion.
- This is an increase of **€154** million
- Market share for organic stands at **3.70%**

**excludes Aldi-Lidl, includes organic specialty stores*

Italy Organic value growing strongly

Organic value growth in supermarkets **2.8%** better in organic than non-organic food



* Own elaborations based on Nomisma, 2024; Nielsen 2024

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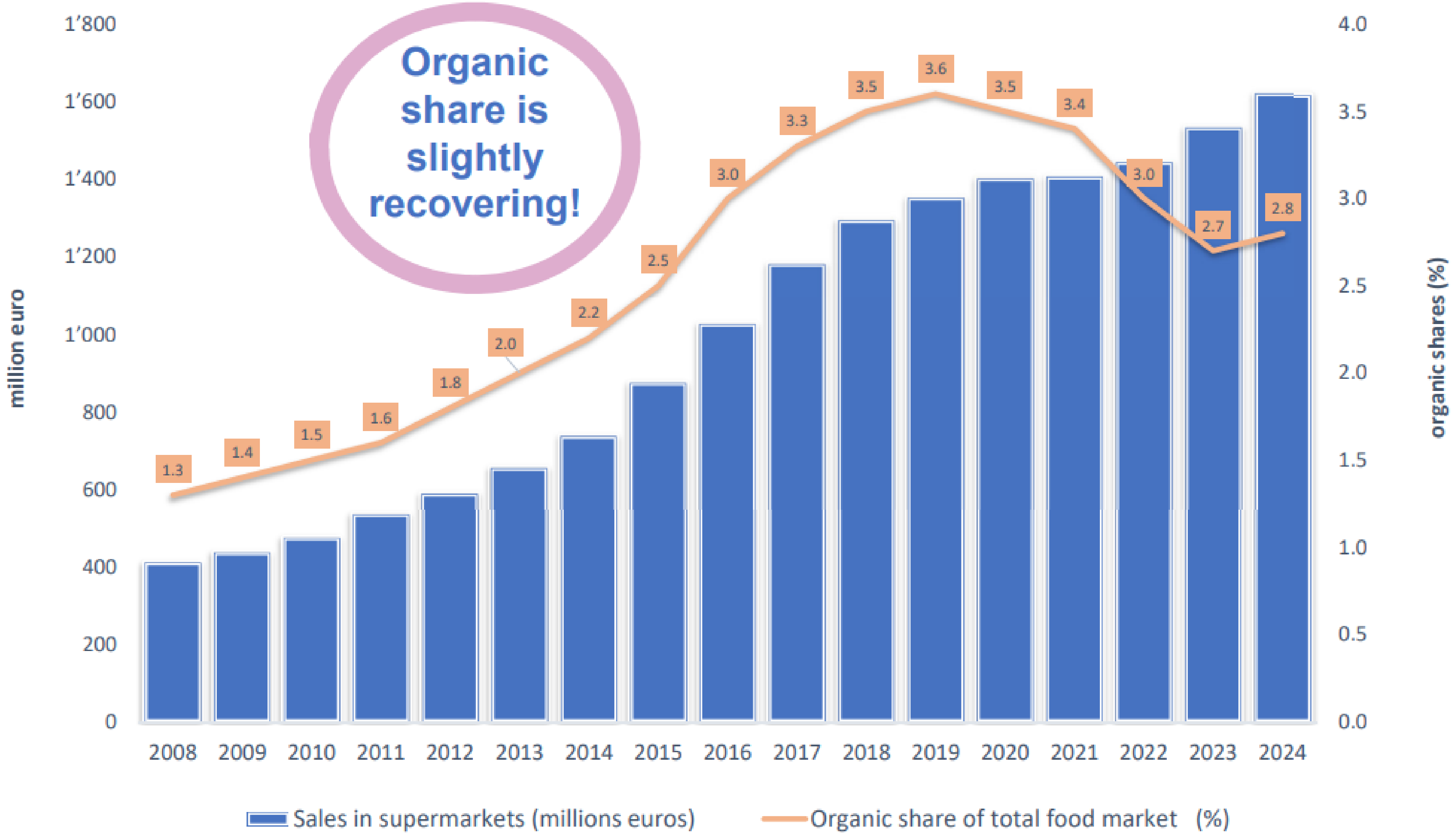
Organic share almost static **(+0.1%)**



* Own elaborations from Nielsen Q Discover, 2024

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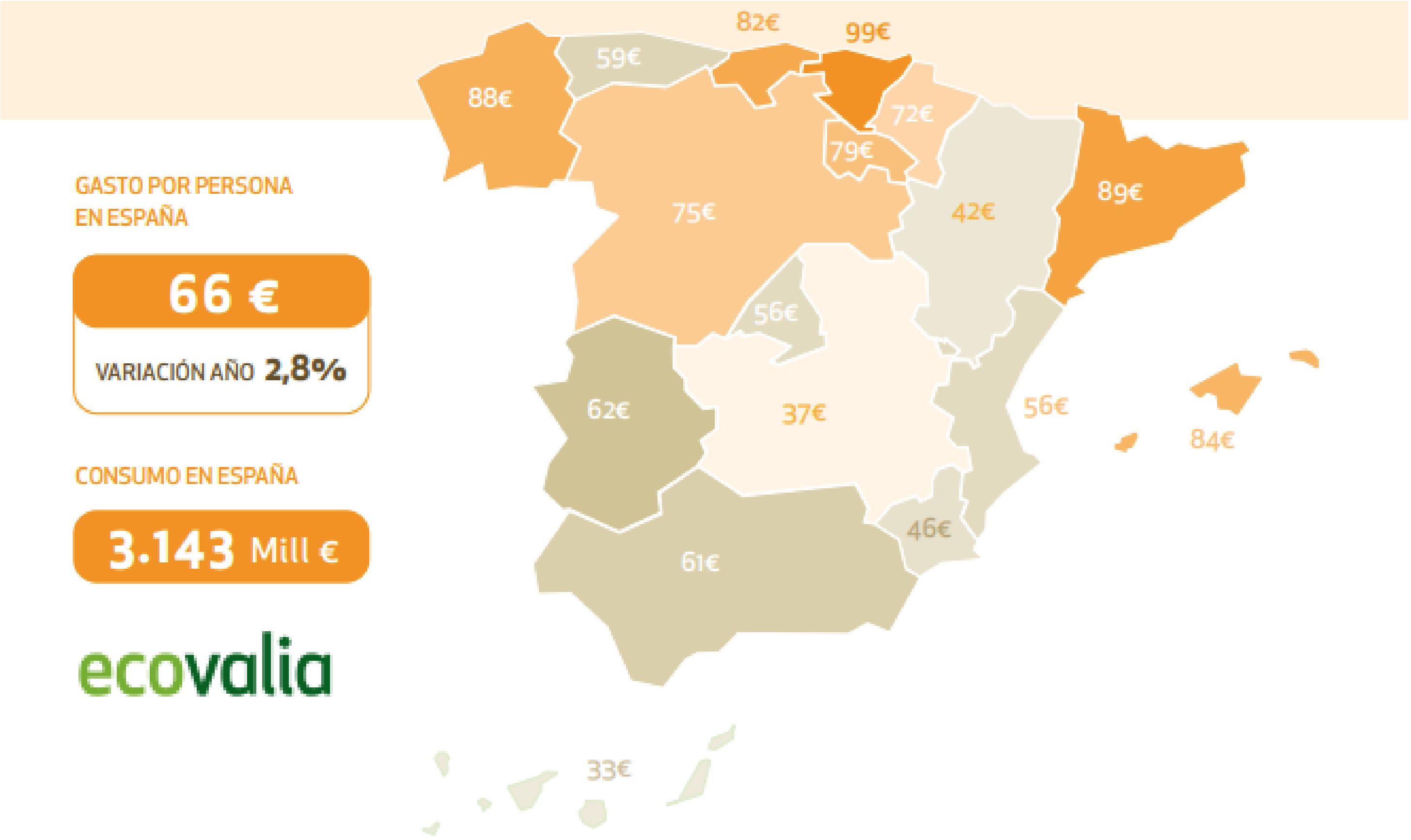
Spain Spend per person increased in 2024

Organic per capita spend is at **+2.8%**

36% of the population consumes organic products more than once a week

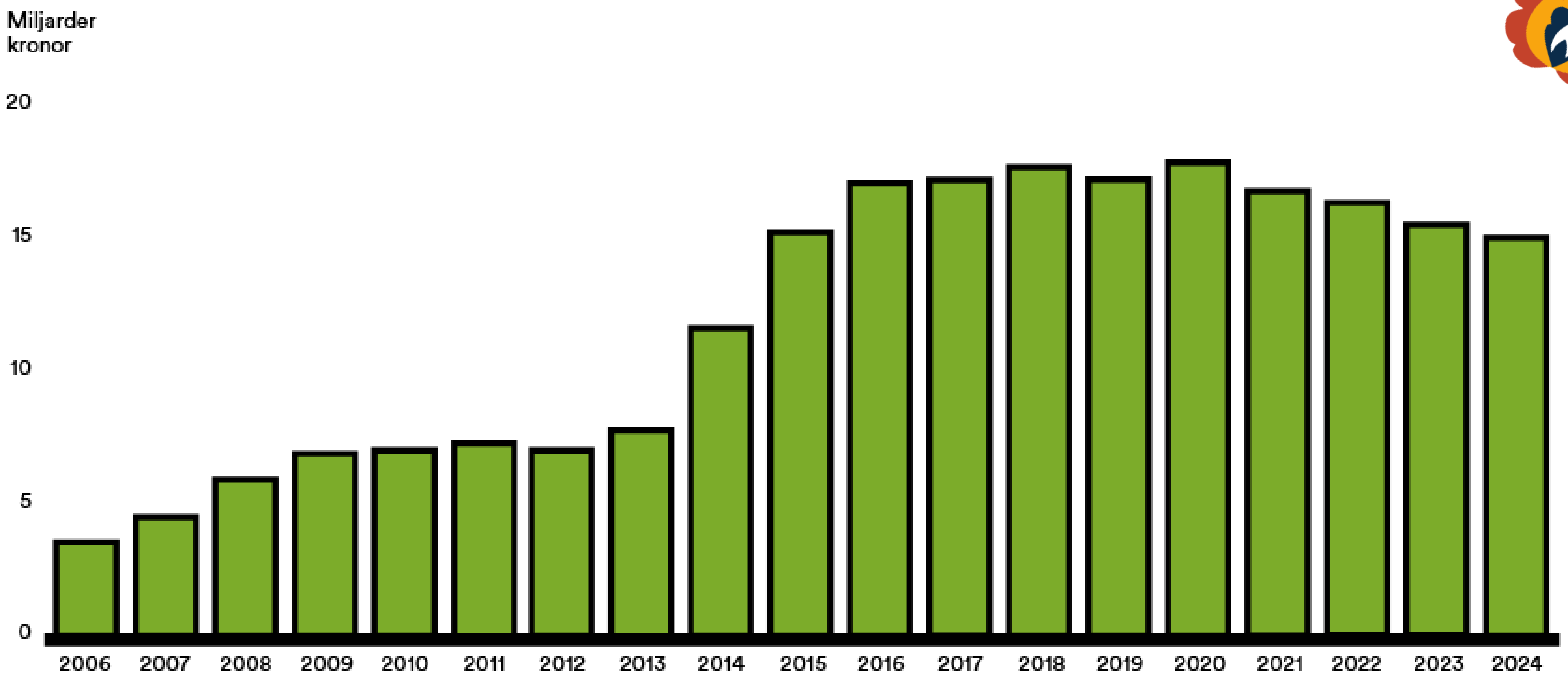
On average **3.2%** of the total basket spend is organic



Sweden Still struggling with production-linked inflation 2024

Slight value and volume **decreases** again in 2024 after inflation and 5 years of reduced campaign activity

Nudging activity has seen 65% increase in oats and 164% in one juice!



Organic Sweden

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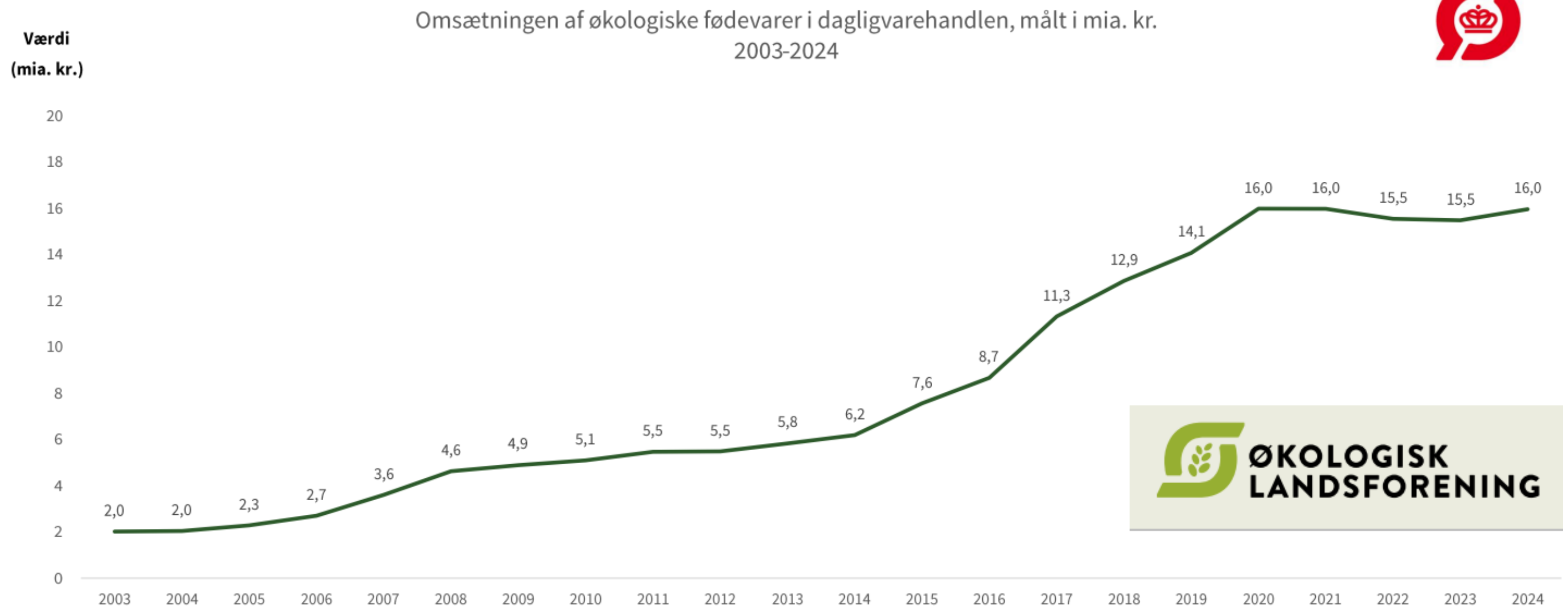
Denmark Green shoots of recovery in 2024

Recovery has begun (**+3.1%** value and **+1.9%** volume in 2023-24), with growth driven by price increase and frequency

Discounters showing **2%** higher frequency and nearly **12%** more penetration compared with other supermarkets (Q1 2025)



Remains one of the higher shares in Europe (**12.7%** in 2025) and foodservice consumption is significant

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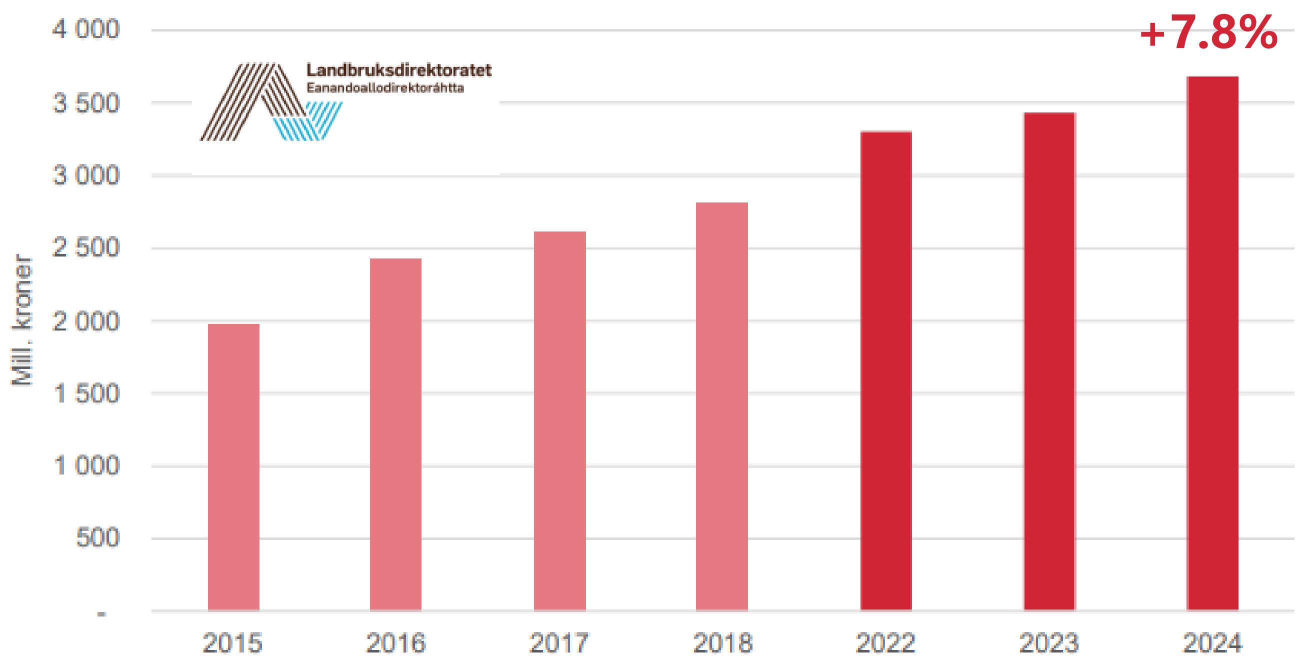
Norway & Finland and Norway perform differently



Foodservice continue to grow in Finland (largest share)
Fresh produce sales fell in Norway but livestock growing

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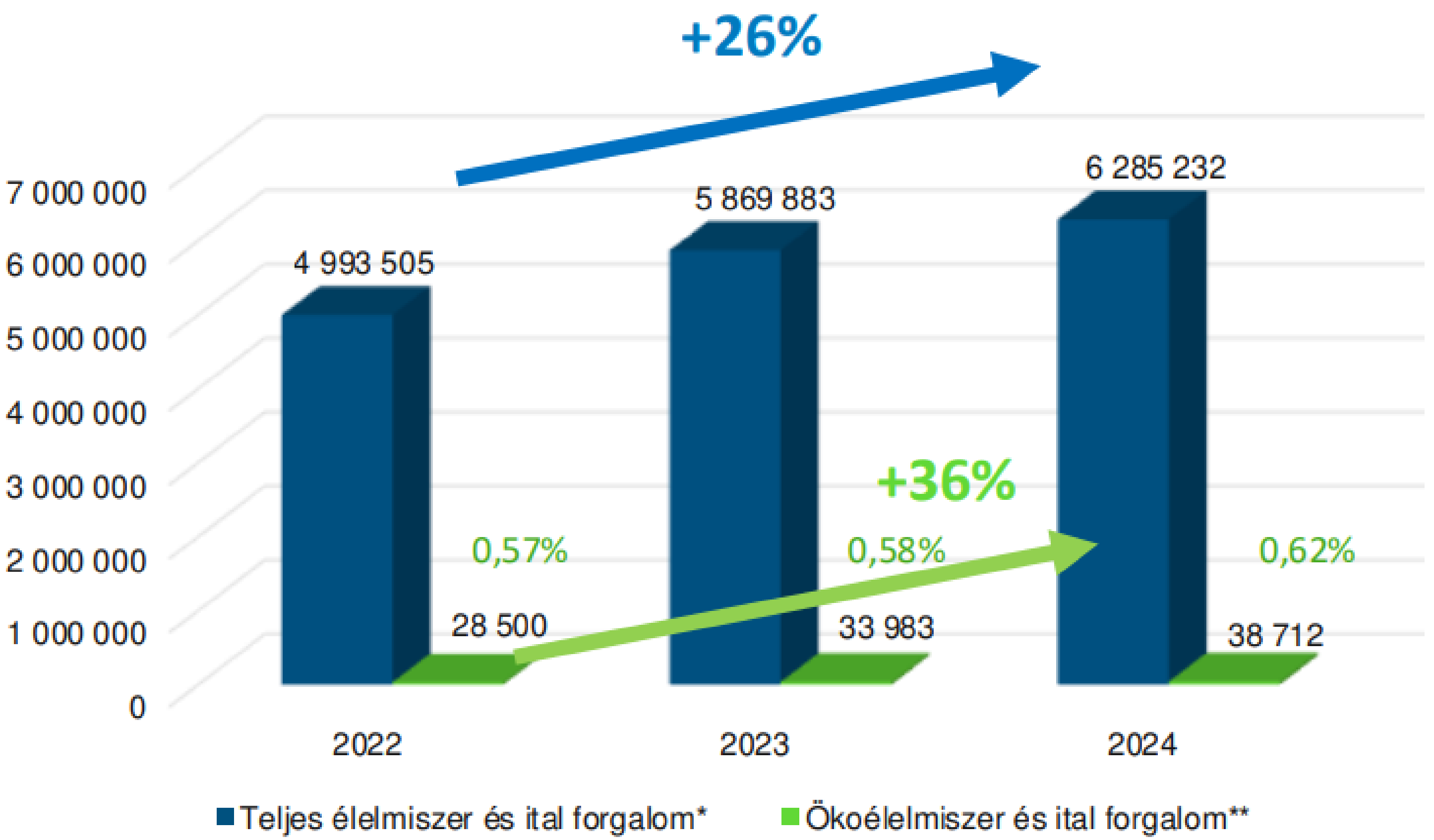
Hungary Supermarkets taking more share

NIQ measured retail sales value (million HUF of organic products showing **+36%** with discounters seeing the most growth

Total food and beverage sales growing at only **+26%**



ÖMKi
Ökológiai Mezőgazdasági Kutatóintézet
BIOKUTATAS.HU

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Poland No upward trend due to low availability

biokurier.pl

Organic market has a value over 2 billion PLN (2023) = c.a. 470M Euro, with **1%** Share

50% of the market is in retail chains and c.a. 50% in specialist stores.

Significant competition between Lidl and Biedronka led to a reduction in the organic offer in supermarkets

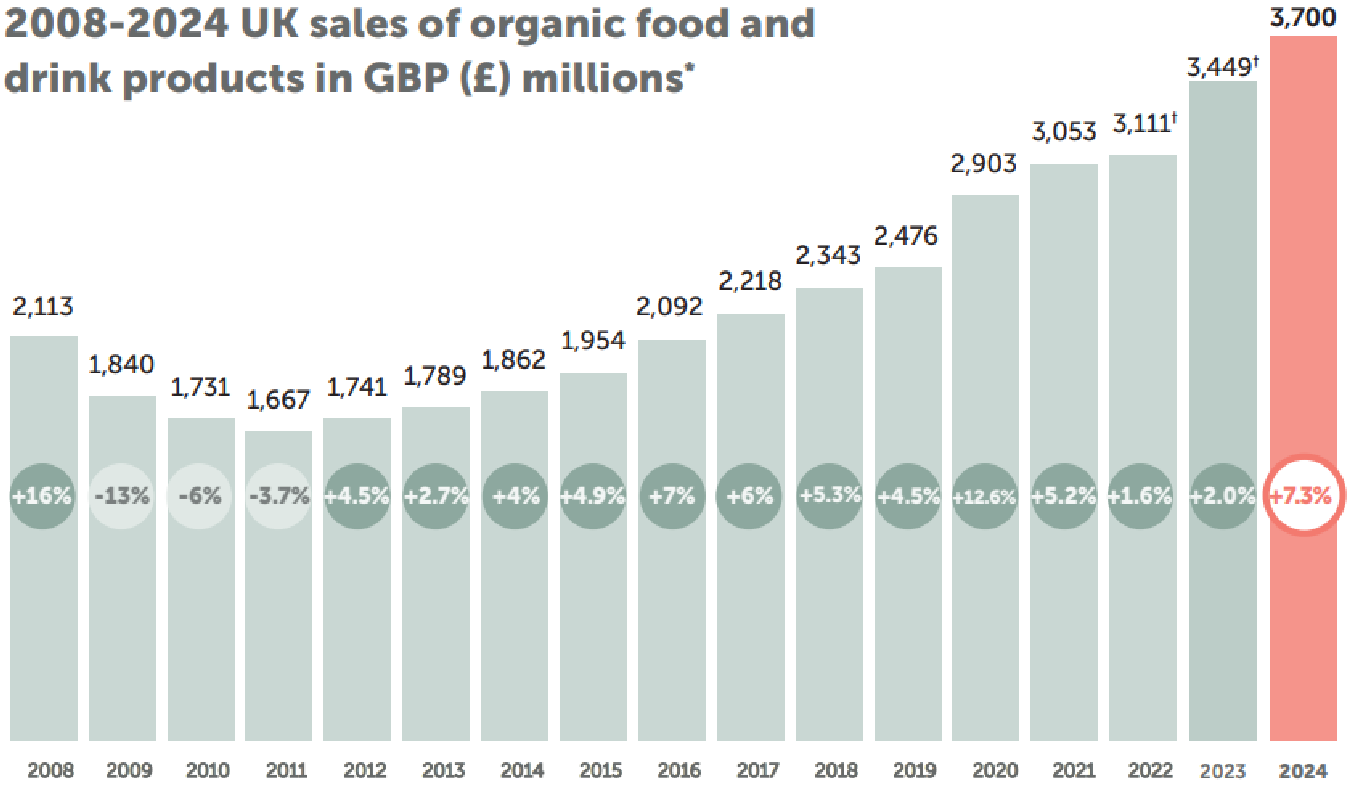
The price difference between organic and conventional products in Poland is decreasing, but it is still higher than in Western European countries

UK now its 13th consecutive year of growth

£3.7 bn

Total organic
food and drink market

2008-2024 UK sales of organic food and drink products in GBP (£) millions*

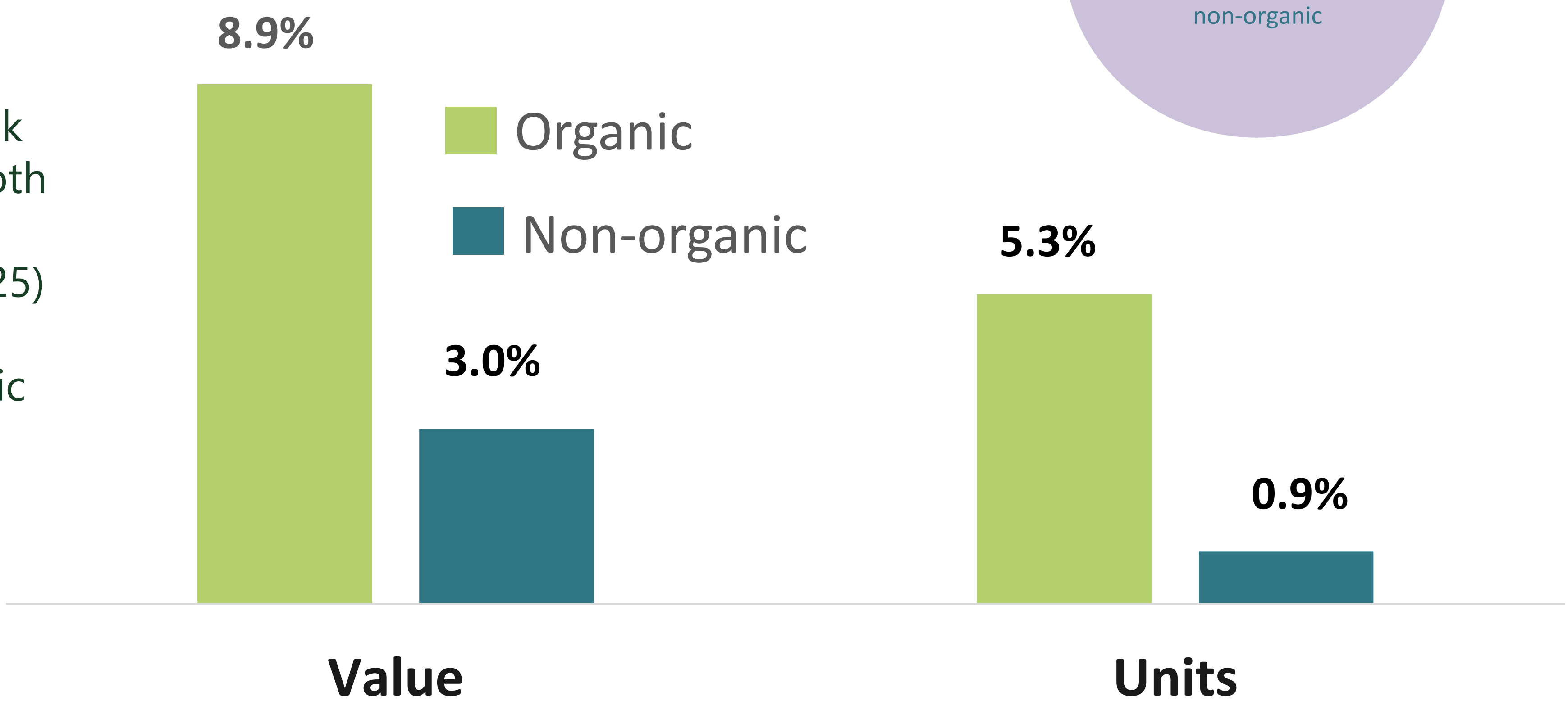


* Based on Soil Association Certification Organic Market Reports

† This figure has been adjusted to reflect changes to the dynamic input provided by data sources

Organic continues to outperformed non-organic food and drink with strong rises in both value and unit sales (March 24 to March 25)

Exceeding non-organic in value and volume



4x

Unit growth of non-organic

Takeouts

European organic market Summary

- Value growth **recovering well** in many states despite economic turbulence – but some exceptions e.g. Nordics
- **Value growth** in supermarkets stronger **than in non-organic** (UK, Italy)
- **Inflation** remains a challenge (Sweden & Holland) organic shops are recovering but are resisting passing on price increases to customers. Less inflation in organic in some markets (Austria, UK)
- **Private label** continues to take more share (Germany,) but **discounter** role less pronounced.
- **Replacement strategy** -exclusively offering organic for core lines – is helping drive growth
- **Public procurement** continues to support slower and more emergent markets (Bulgaria, Finland)
- Non-regulated labels - e.g. '**Regenerative**' - increasingly competing for share (Spain, France, UK)

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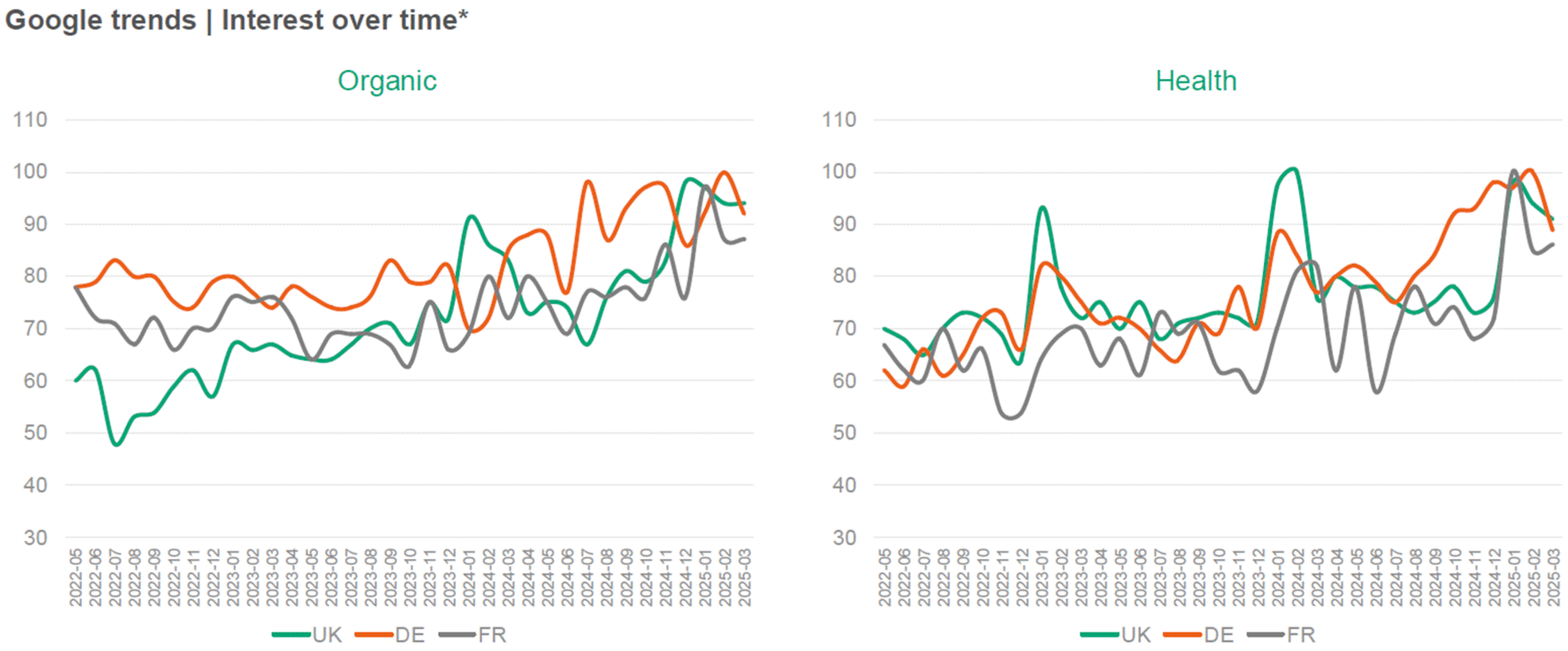
Consumers & health Organic & health rebound together

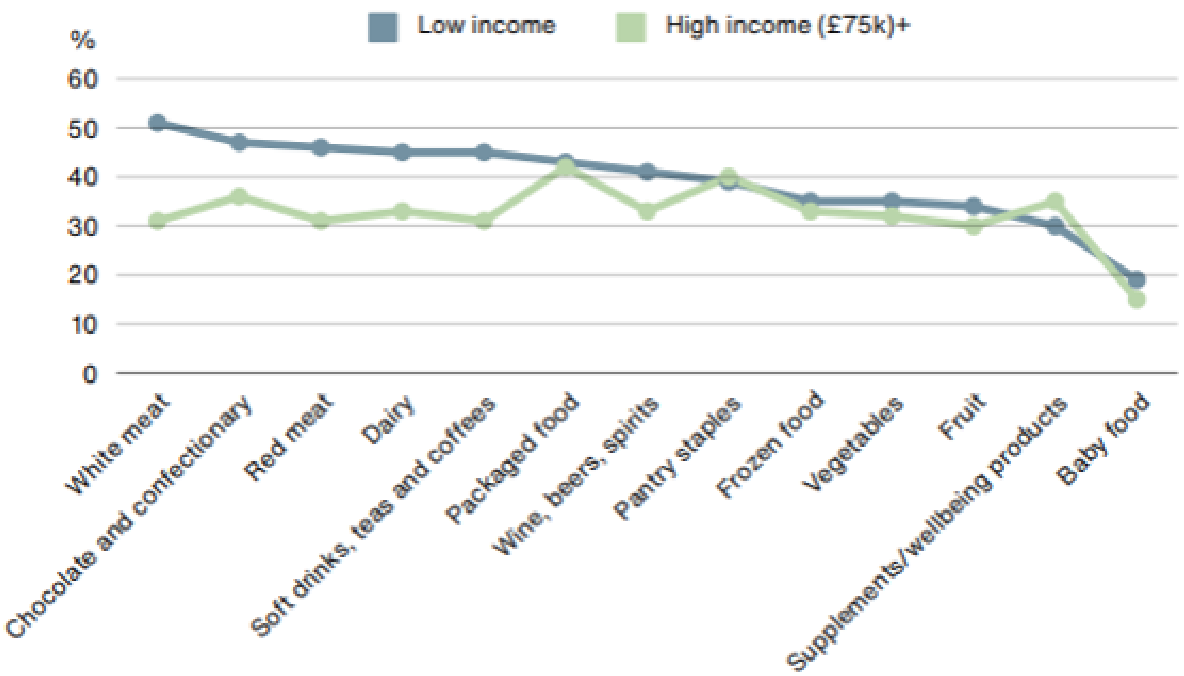


*Numbers represent search interest relative to the highest point on the chart for the given region and time. A value of 100 is the peak popularity for the term. A value of 50 means that the term is half as popular. A score of 0 means there was not enough data for this term.
Source: Google trends, March 2025

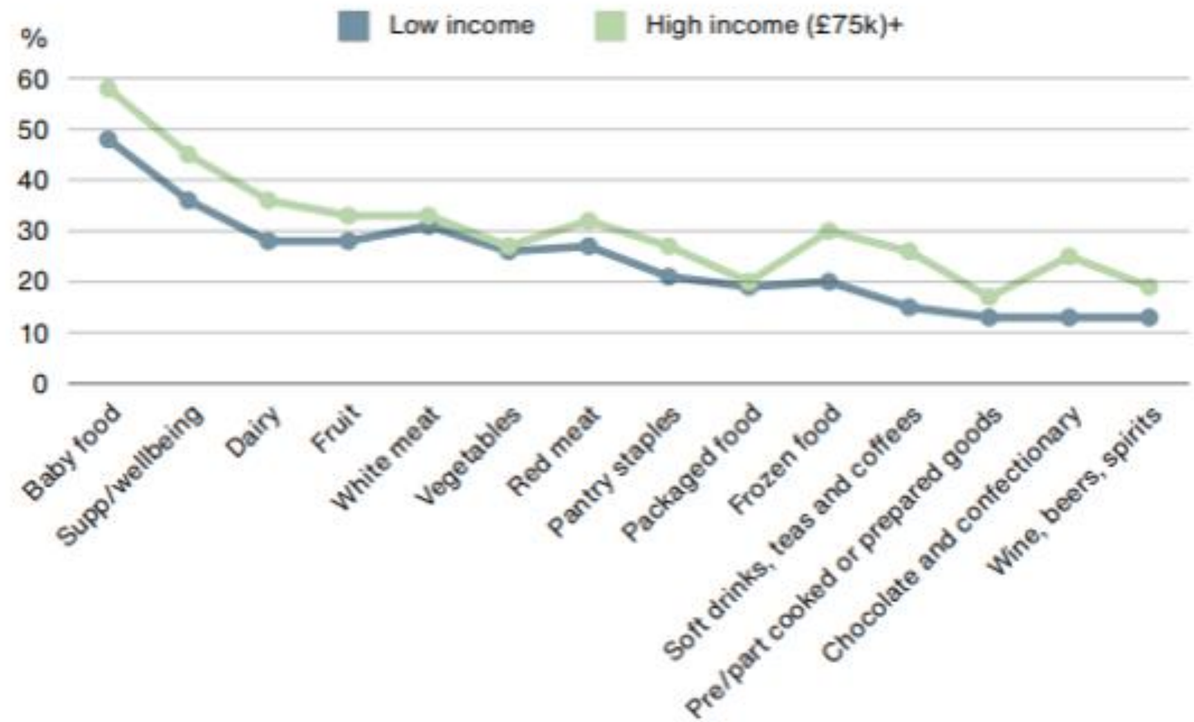
NIQ

Spend Household income is not always important

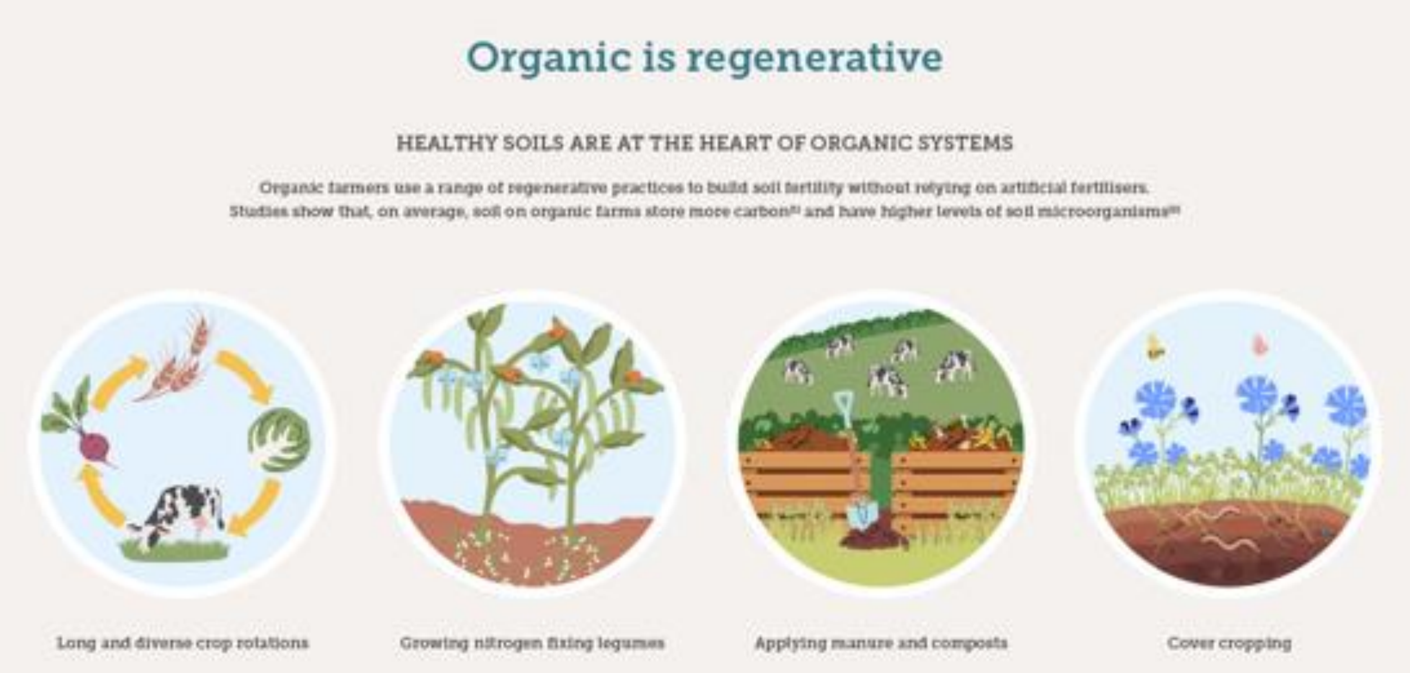
Example 2: "I buy it from time to time (e.g., for a special occasion)"



Example 1: "I always buy this product as organic"



Interest in Regenerative is growing. Are we clear on organic?



- Only 1 in 5 consumers thought organic beat regenerative in terms of being the most environmentally friendly farming method, but:
  - 26% of consumers associate the term regenerative with organic more highly
  - Most consumers couldn't name a regenerative brand

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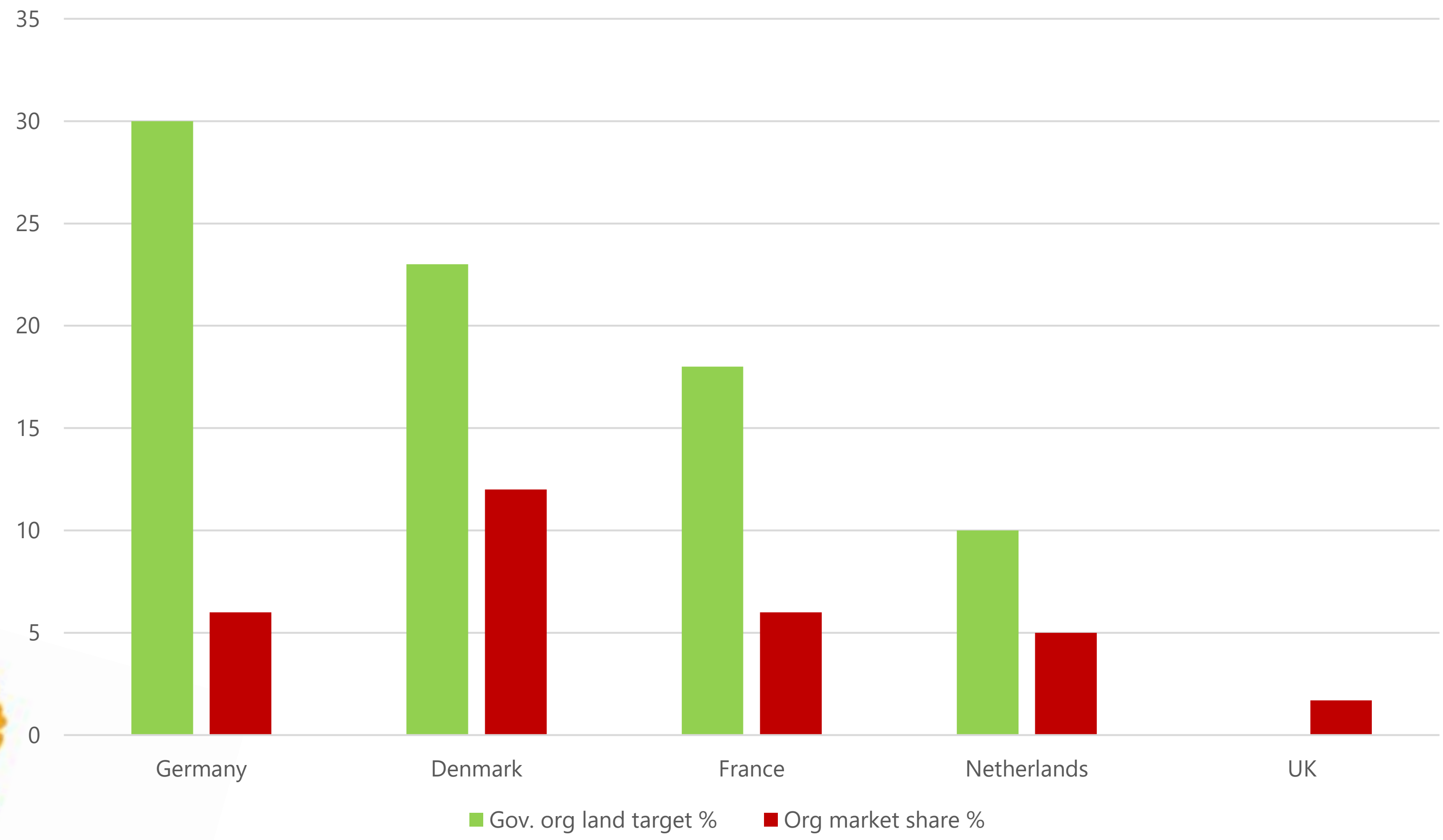
Targets matter market shares show a clear relationship



Established organic land targets in the EU (2027-2030) and organic market shares across key markets

Thank you

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