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COORDINATOR

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PARTNERS

DENMARK (KU)
FRANCE (ACTIA, INRA, ITAB)
GERMANY (AÖL, FH MU, TI)
HUNGARY (ÖMKI)
ITALY (ASSOBIO, CREA, UNIVPM)
POLAND (WULS)
SWITZERLAND (FIBL)
THE NETHERLANDS (WUR)

CORE organic

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WP 5
Update project progress

Toralf Richter, Carola Strassner, Lisa Borghoff
Project Meeting Online, June 2020

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It seems, that in the public awareness rather the number and kind of ingredients matter but not proccessing technologies

Example: German TV reports about a too big number of ingredients and additives to produce veggie burgers, but tells nothing about the processing technologies to produce veggie patties

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Objective – what do we want to achieve?

Gather data and information

- about general organic food market trends
- about different processing technologies

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Status WP 5.1 / Literature Review

- Literature review in process
- Product screening in different countries

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Market trends // Europe

Europe is not a common organic market

Huge differences in organic market volumes and growth rates between European countries

Country	per capita consumption (EUR/Year)
Switzerland	312
France	136
Germany	132
Norway	79
Netherlands	75
Italy	58
Poland	7
Hungary	3

Country	Growth 2015-2018
France	65%
Italy	50%
Poland	50%
Finland	40%
Germany	26%
Switzerland	22%
Norway	20%
Netherlands	12%
Hungary	?

Source: https://statistics.fibl.org

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Market trends // Scandinavia

Organic food market is expected to grow trifold by 2030

Especially in Denmark (13% market share) and Sweden (9%) are the driver for organic market development now and next 10 years.

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Market trends // Switzerland

Processed organic food is gaining importance (data from 2019)

Total Schweiz	CHF Mio.	Organic market share	Annual growth
Total CH	**2392,8**	**10,3 %**	**+3,4 %**
Total Fresh Products	1526,6	13,3 %	+2,1 %
Total Packed Products	866,1	7,4 %	+5,8 %
Eier	95,0	28,7 %	+6,7 %
Bread	224,1	26,1 %	+1,4 %
Gemüse/Salate/Kartoffeln	335,7	23,1 %	+4,3 %
Früchte	257,5	17,5 %	+4,4 %
Breakfast cereals	269,2	14,7 %	+7,6 %
Convenience, perishable	193,4	11,4 %	+0,9 %
Dairy Products	354,4	11,0 %	–0,3 %
Convenience, non-perishable	119,9	9,2 %	+10,4 %
Fleisch, Fisch (ohne TK)	259,8	6,2 %	–0,3 %
Bakery products	56,2	5,4 %	+2,9 %
Tiefkühl-Kategorien	39,8	4,8 %	+0,5 %
Beverages	122,4	4,0 %	+6,5 %
Snacks	65,3	3,5 %	+10,2 %

Source: Bio Suisse

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Market trends // Germany

Organic food market continues to grow

Especially producer brands with label from Naturland, Bioland and other associations gaining importance (+17% in 2019) whereas organic trademark products from retailers only grew by 6%.

>> Do also differences in product quality / processing standards play a role in this development?

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Status WP 5.2 / Market survey

- Delayed status on different reasons
- Final questionnaire edited in online survey tool
- in process of translation in different European languages (English, German, French, Italian, Spanish, Russian, Dutch, Hungarian)
- Ready to be sent out on June 15
- Data collection by July 30
- Data analysis by August 30
- Draft report about survey results by September 30

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Status WP 5.2 / Market survey

- Ask for support in dissemination
- Please share a cover letter and the link to the questionnaire to your professional networks
- In parallel also IFOAM EU group will distribute the link

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Online market survey >> Contributions to CoP

1) The response rate as an indicator for the importance of the topic among organic stakeholders

2) Better insights what stakeholders understand about term "gentle processing"

3) View about the general acceptance of the (potential) use of technologies for organic processing

4) Opinions regarding our BIG 3 quality dimensions related to processing technologies

- Sensory quality, nutritional quality, environmental impact

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But how is our own opinion?

- Do we have as a consortium a similar opinion about the quality influence of processing technologies we would accept under organic conditions?

Go to www.menti.com and use the code 78 18 92

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THANK YOU FOR YOUR ATTENTION

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Questions to be further reflected

- What is the relevance of processing technologies in organic value chains out of expert panels or stakeholder opinions?
- Does processing technology only matter when consumers are better and proactive informed about the impact of technologies?
- Does processing technology only matter when differences would be discussed stronger in public/media?
- Does processing technology only matter when it would be stronger regulated?