Presentation at BioFach Kongress 2009, Nürnberg Messe Convention Centre, Nuremberg, Germany, February 19-22, 2009.

Specialised Organic Retail Report Europe 2008

Compendium of the Organic Market in 27 European Countries

Tom Vaclavik, ORA, February 20, 2009
BioFach 09

ECOZEPT

bioVista
Impulsgeber für den Bio-Markt

ORA
Organic Retailers Association

Specialised Organic Retail Report Europe 2008

Supported by

World Organic Trade Fair

Natur für die Sinne.

27 Portrayed Countries

Belgium

Denmark

Germany

Finland

France

Greece

Bulgaria

Croatia

Malta

Norway

Great Brittain

Italy

Luxembourg

The Netherlands

Portugal

Sweden

Poland

Austria

Slovenia

Romania

Switzerland

Spain

Turkey

Cyprus

Slovakia

Czech Republic

Hungary

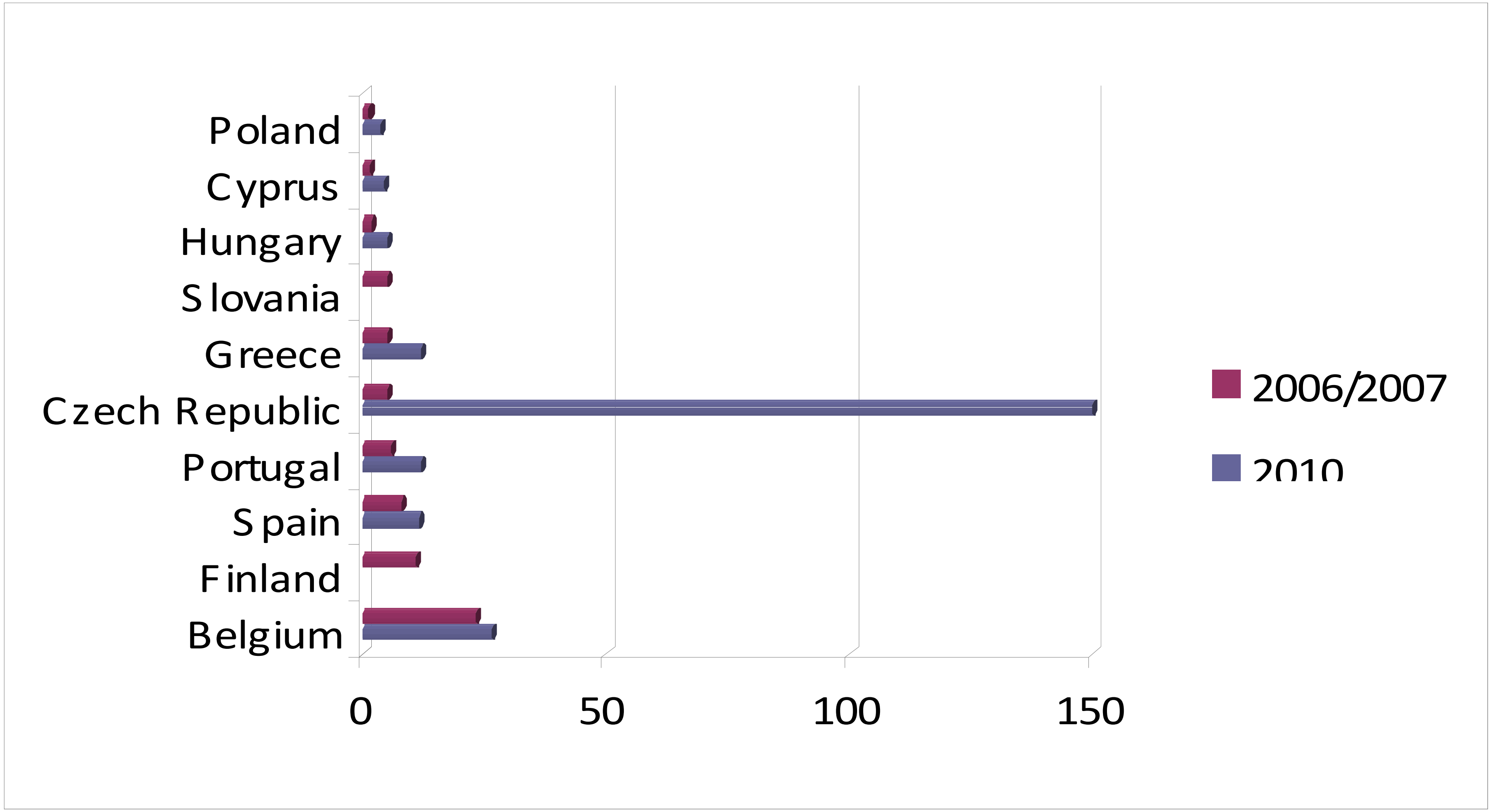
ECOZEPT

bioVista

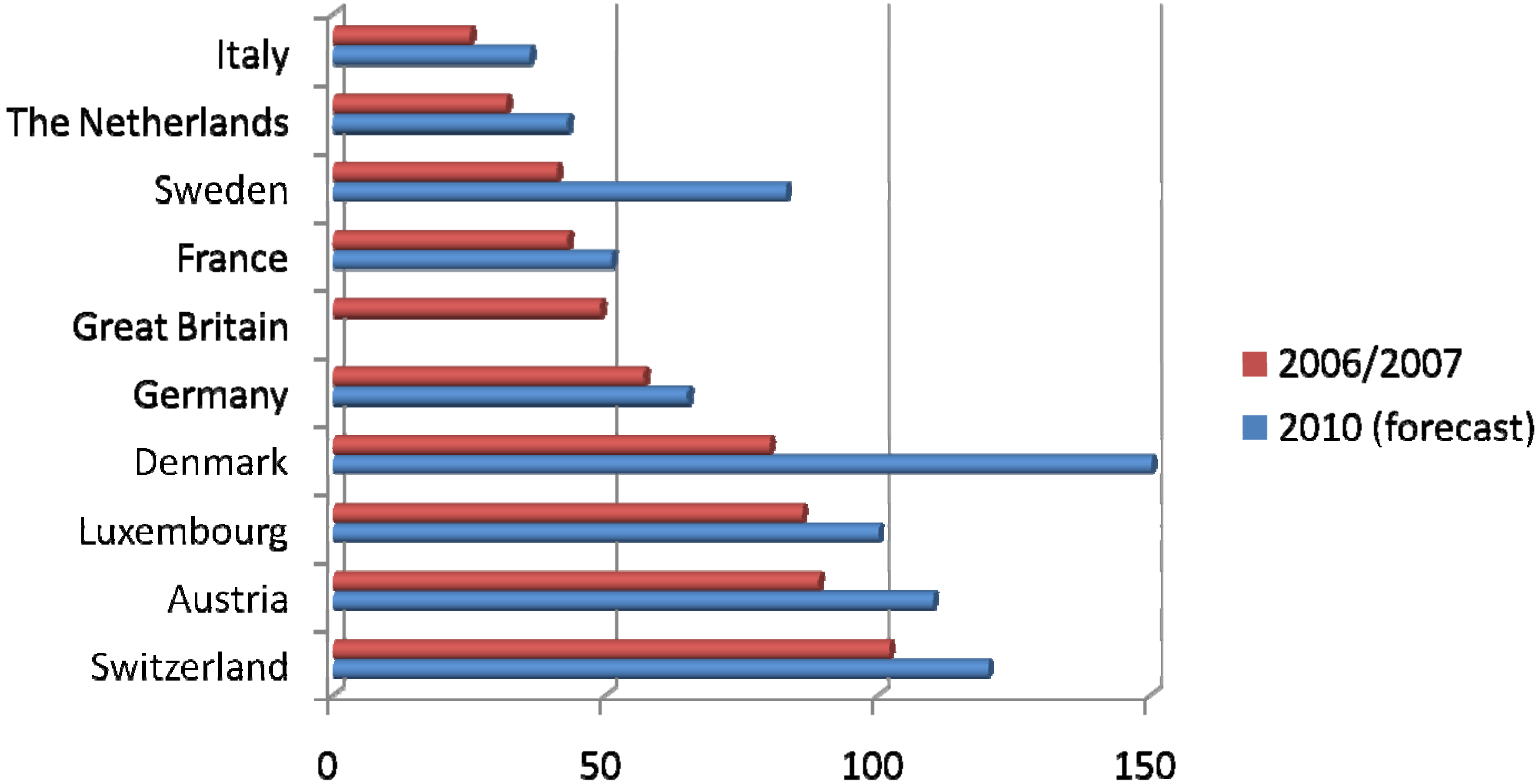
Impulsgeber für den Bio-Markt

ORA

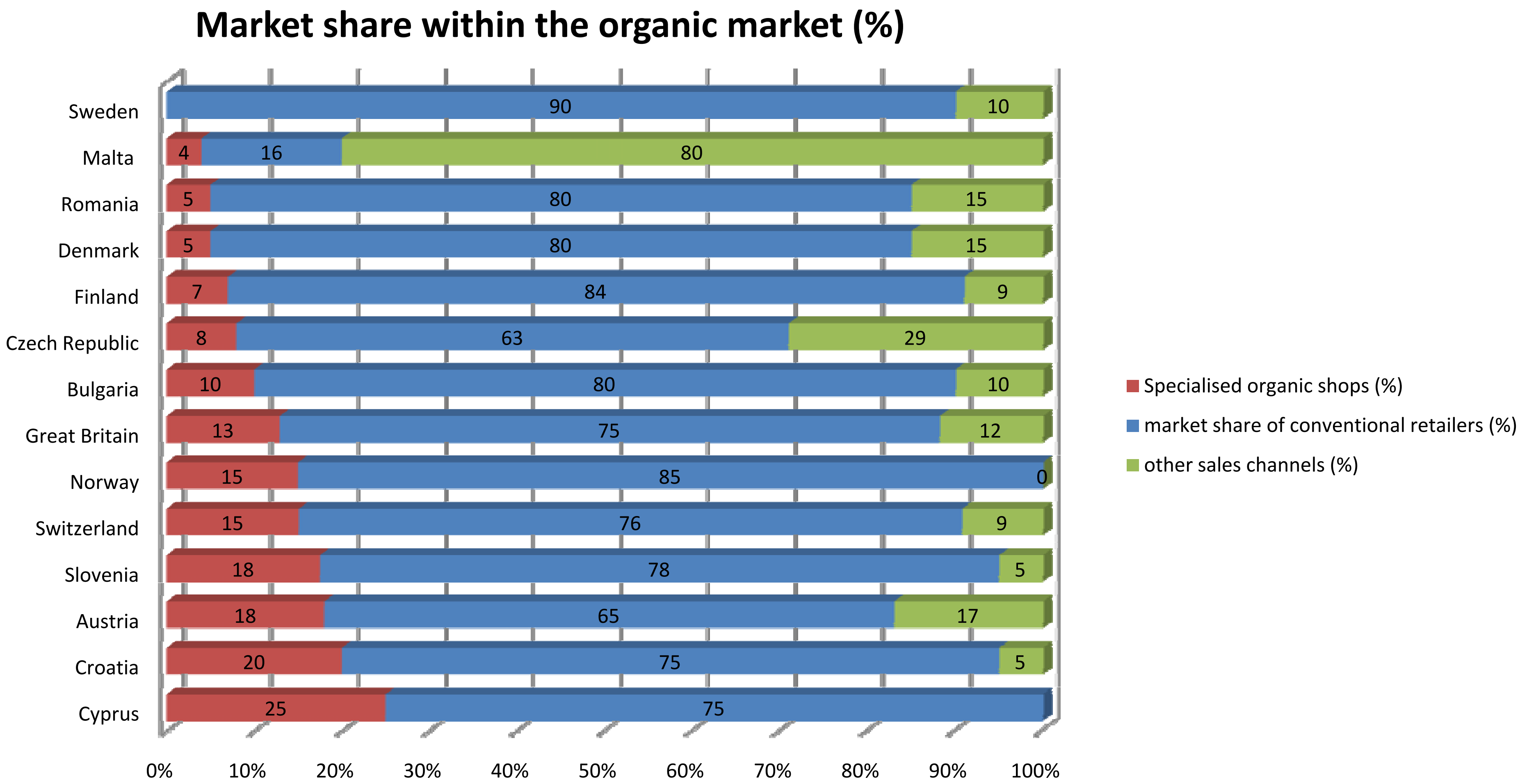
Annual amount spent on organic food per person (<€ 25)



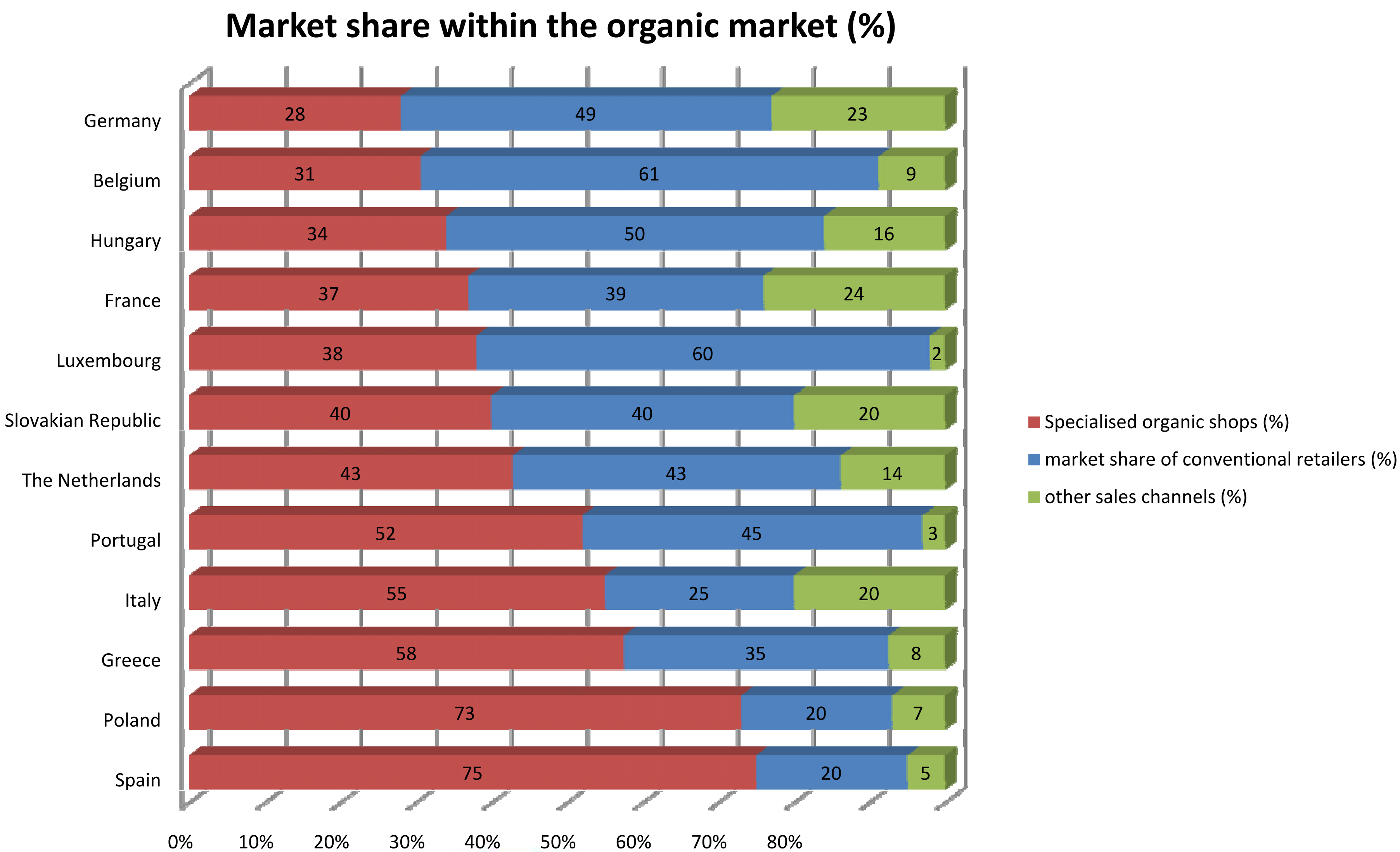
Annual amount spent on organic food per person (≥ € 25)



Specialised organic retailers >25%



Specialised organic retailers ≤ 25%



ECOZEPT bioVista Impulsgeber für den Bio-Markt ORA Organic Retailers Association

Specialised organic sector > 40% of market

- Poland: 73%
- Italy: 55%
- Spain: 75%
- Portugal: 52%
- Slovakia: 40%
- Greece: 58%
- The Netherlands: 43%

ECOZEPT   bioVista Impulsgeber für den Bio-Markt   ORA

Focus CEE

Bulgaria

Romania

Croatia

Poland

Slovenia

Czech Republic

Slovakia

Hungary

ECOZEPT

bioVista
Impulsgeber für den Bio-Markt

ORA
Organic Retailers Association

Retail channels for organic products in CEE (2006/2007)

	Conventional supermarket	Spec. organic shops	Health food shops	other	Other - description
BU	80 %		10 %	10 %	Small shops w. few org. products
CR	75 %	20 %		10 %	Farmers' market (2%), box (2%)
CZ	63 %	8 %	14,5%	12 %	Drugstores, pharmacies, other
HU	50 %	34 %		16 %	Catering & restaurants (8 %), online sales (5 %), box (3 %)
PL	20 %	73 %		7 %	Online sales, crafts (bakery…)
RO	80 %	5 %	15 %	10 %	
SK	40 %	40 %	20 %		
SI	80 %	15 %		5 %	Direct sales, crafts, online

Retail channels for organic products:
health food shops, specialised organic shops ()

	Market share	No. of outlets	Range width	Range focus
BU	10 %	2	300	Processed packaged p./ Dairy /Fresh
CR	20 %	20	200 - 500	Processed packaged p. / Vegetables
CZ	22,5 %	500 (10)	300 (1.000)	Processed packaged p. / Nuts, dried fruits, cereals, legumes / Drinks
HU	34 %	80 (10)	wide	Bakery / Fresh / Cereals, seeds
PL	73 %	(250)	(500- 2.000)	Cereals/ Vegetables and fruits / Meat
RO	5 %	100 (2)		Soy products / Herbs / Honey (Dairy / Bread)
SK	40 %	56	30	Cereals/Confectionary /Milling p., tea
SI	15 %	20	2.500	Fresh vegetables and fruits / Basic foods / Processed plant products

Main reasons for buying in specialised organic shops

- Wider product range, regular supply
- Competence of shop staff
- Availability of special non-food items



Customer typology in specialised organic retail

2006:

- young – middle age, urban, health-conscious, well informed; health problems; environmentally aware

2010:

- share of customers with health problems decrease - environmentally aware increase; more families with small children; **trendy**

Future development
of the specialised organic market sector

Market share and turnover:

- will decrease in favour of supermarkets,
- nevertheless the overall turnover of specialised organic retail will increase.

Product range:

- growth - widening;
- more fresh products and regional products;
- increasing import AND domestic production

ECOZEPT

bioVista
Impulsgeber für den Bio-Markt

ORA
Organic Retailers Association

Challenges/Opportunities for specialised retailers in CEE markets

Challenges:

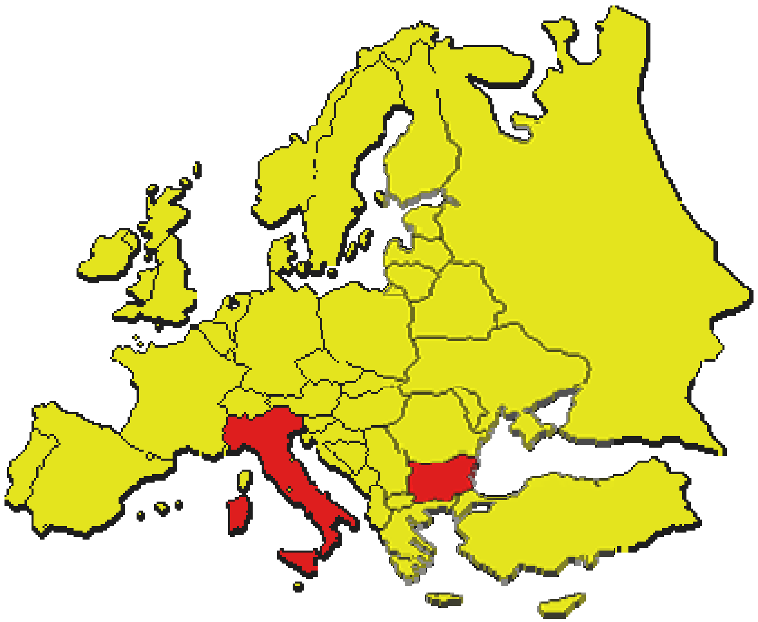
- Cooperation: vertical & horizontal
- Missing efficient supply chain structures
- Lax organic retail standards
- Big pressure from conventional retail trade

Opportunities:

- Shops networking in order to build single brands and share supply structures
- Keywords: freshness, food with a story, convenience, service
- Attune store concept to wider target groups (LOHAS)
- Educate staff in product knowledge, management & communication
- Profit from growth of organics in conventional retail channels

ECOZEPT bioVista Impulsgeber für den Bio-Markt ORA Organic Retailers Association

Country inhabitants per organic food sales outlet



Italy

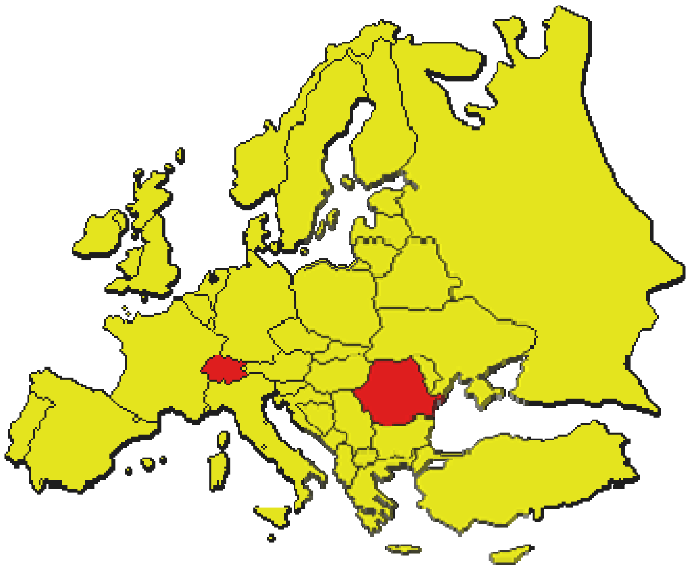
900

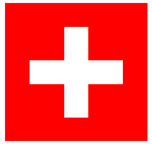
Poland

90‘000

ECOZEPT
bioVista
Impulsgeber für den Bio-Markt
ORA

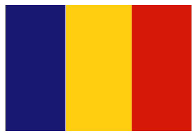
Country inhabitants per specialised organic store





Switzerland

13‘000



Romania

11‘000‘000

Specialised Organic Retail Report Europe 2008

- 27 Countries
- 380 pages
- Price: € 350 / piece
- **Order here** or on

www.ecozept.de