

Organic Monitor

Global Organic Food & Drink: Market Update & Outlook

by

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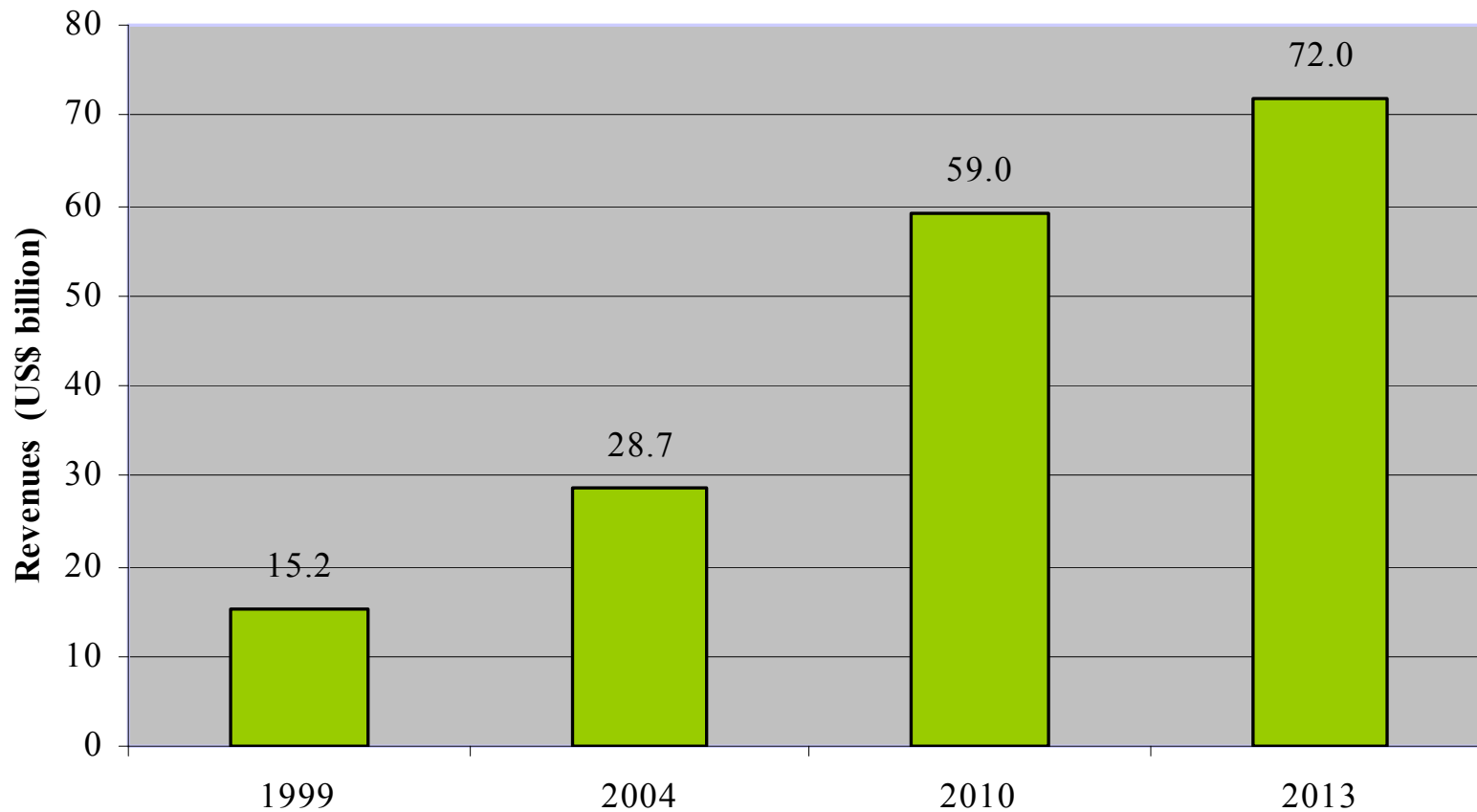
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Global market growth



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North America

Market size US \$35 billion

Leading country USA

Main channels Supermarkets

Latest developments Healthy growth

Undersupply



Europe

Market size

US \$31 billion

Leading countries

Germany, France, Italy

Main channels

Specialists, supermarkets

Latest developments

Steady growth

Economic sentiment



Asia

Market size

US \$4.4 billion

Leading countries

China, Japan, South Korea

Latest Developments

Local markets

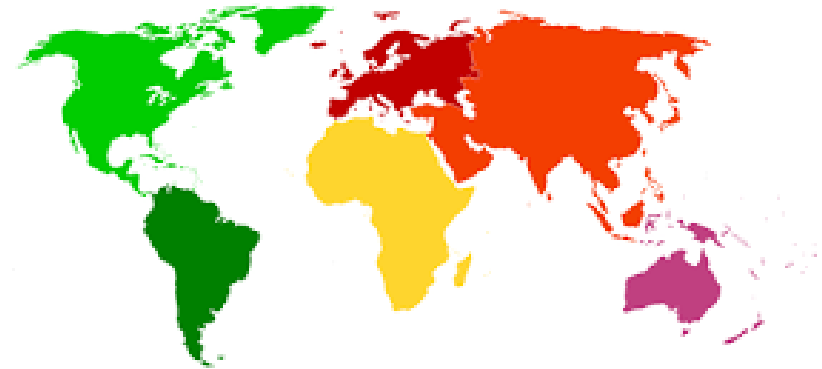
Government role

Labeling



Food traceability & authenticity

- Organic means premium price
- Growing risks of food fraud



Q: How can you maintain organic integrity
as supply chains become global?



Competing products

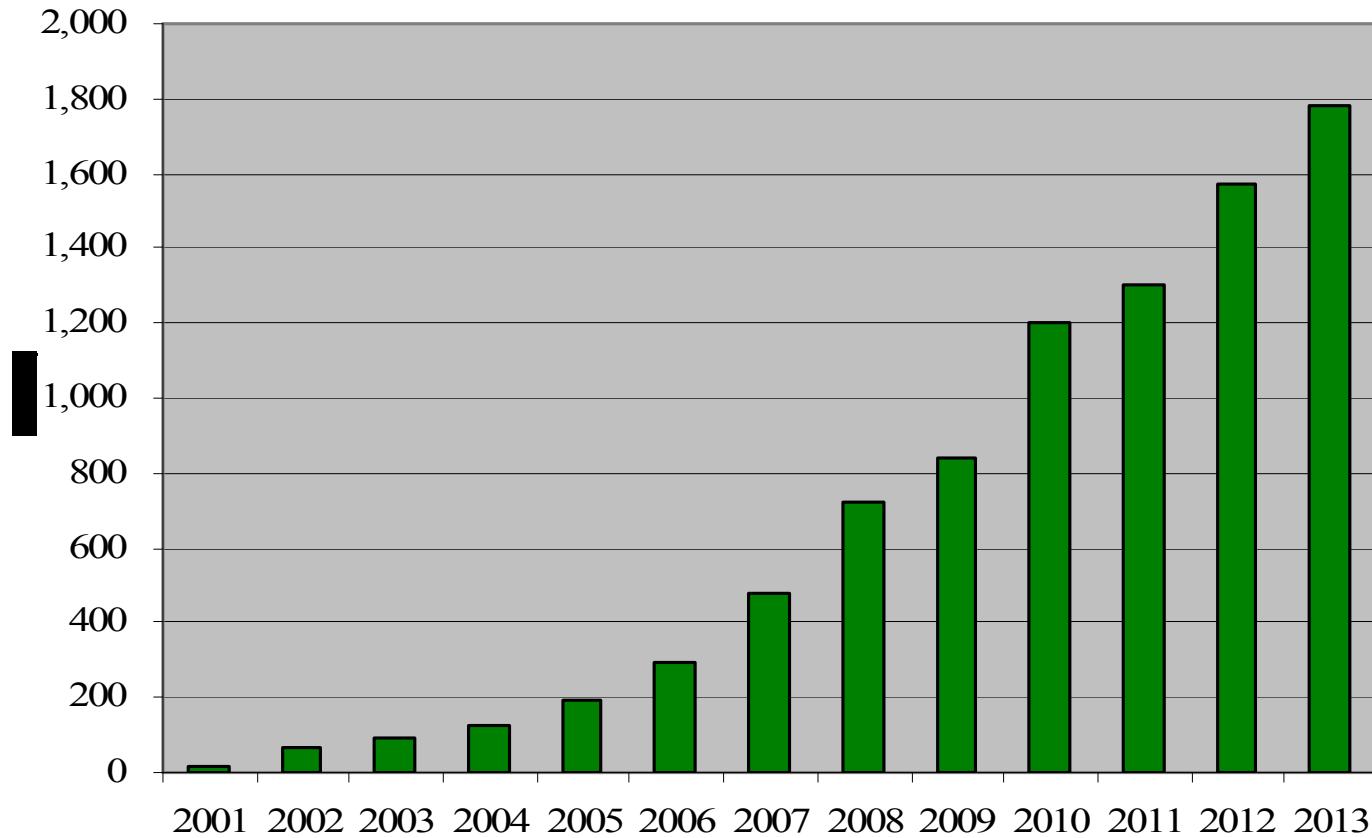
Organic is dominant eco-label, but facing competition...

Fair trade products market

- Global market size, USD 7.0 billion
- Leading markets: UK, Germany,
France



UK market growth



Source: Fairtrade International

Future of organic?

- Food industry looking at becoming more sustainable
- Consumers demanding green / ethical products

Q: Where is organic in growing sea of eco-labels?



Proliferation in eco-labels



Certified



Gluten-Free



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Thank You

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