

# REPORT GERMANY

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AssoBío

  
*Nomisma*

**Biols**EU  
BIO ORGANIC LIFESTYLE

# THE SURVEY-BASED SYSTEM: methodology

	CONSUMER SURVEY	TRADE SURVEY	IN-DEPTH INTERVIEWS
TARGET & ELIGIBILITY CRITERIA	Person in charge of the family food purchasing decision (18-65 yo)	Restaurants and retailers (independent/chain, Organic specialized retailer/Other specialized retailer/Generic grocery)	Professionals and stakeholders (associations, journalists, buyers..)
SETTINGS	Stratified sampling by age groups, gender and geographical areas per Country	Random Sample	Random Sample
SAMPLE SIZE	1.000 per Country	Italy: over 3.500 contacts Germany: over 6.000 contacts France: almost 2.000 contacts	About 50 contacts per country
LOI	34 questions	16 questions	13 questions
MODE	mixed CATI-CAWI mode (Computer Assisted Telephone Interviewing + Computer Assisted Web Interviewing)		
QUESTIONNAIRE	Structured with partially-closed-ended questions	Structured with partially-closed-ended questions	In-depth interviews with open ended questions



# TOPICS

1

MARKET OVERVIEW

2

CONSUMER SURVEY

3

TRADE SURVEY

4

IN-DEPTH INTERVIEWS










# MARKET OVERVIEW



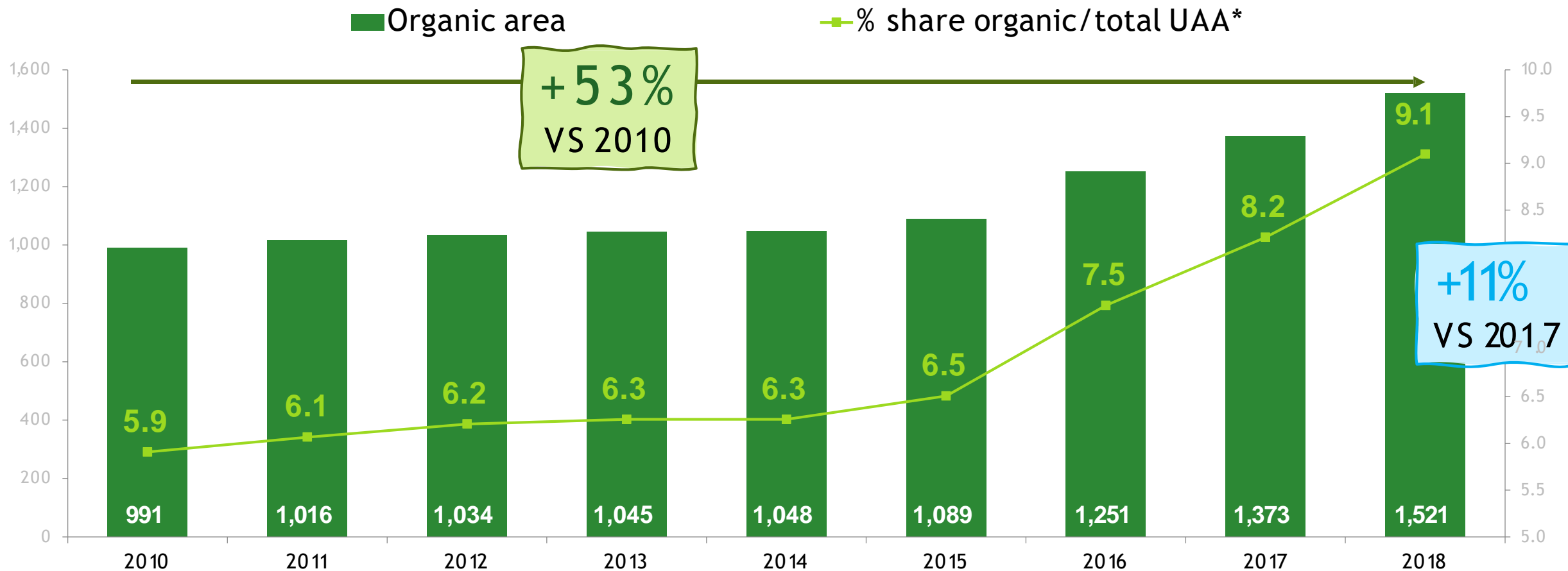
## HIGHLIGHTS/1



-  9.1% of the total German utilized agricultural area is organic (1.5 mln ha in 2018), with organic operators reaching 50,085 units.
-  Germany is the 2nd market in terms of organic retail sales, representing 11% of the world organic retail sales (+9% vs 2017 and +81 vs 2010).
-  The German annual expenditure for organic food is 132 € per capita vs a European average value of 51 €/person.
-  The total value of the German organic market accounts for 10.9 bil € in 2018.
-  The large-scale retail trade is the first channel in terms of sales: it represents 59% of total sales' value (+9% vs 2017), followed by organic specialized shop (27% of sales' value and +1% vs 2017) and other channels such as bakeries, butchers, fruit & vegetable shops, farmer's markets, etc. (with a share of 14% and +2% vs 2017)
-  Eggs, milk and vegetables oils are the main products in terms of organic share: 12.6% of the eggs purchased by German families is organic, vs 8.7% of the milk and 7.8% of vegetables oils.
-  The organic products with the highest grow rate in terms of values are flour (+12.5% vs 2017), eggs (+6.7% vs 2017) and milk (+5.8% vs 2017) while bread, fruit and potatoes show the worst performance. Even with regard to volumes purchased flour is the first product by grow rate (+10.3% vs 2017), followed by poultry (+8.1% vs 2017) and cheese (+6.8% vs 2017), while butter records a volume decrement pairs to -11.2%.

# ORGANIC AREA

Trend 2010-2018 (.000 ha)



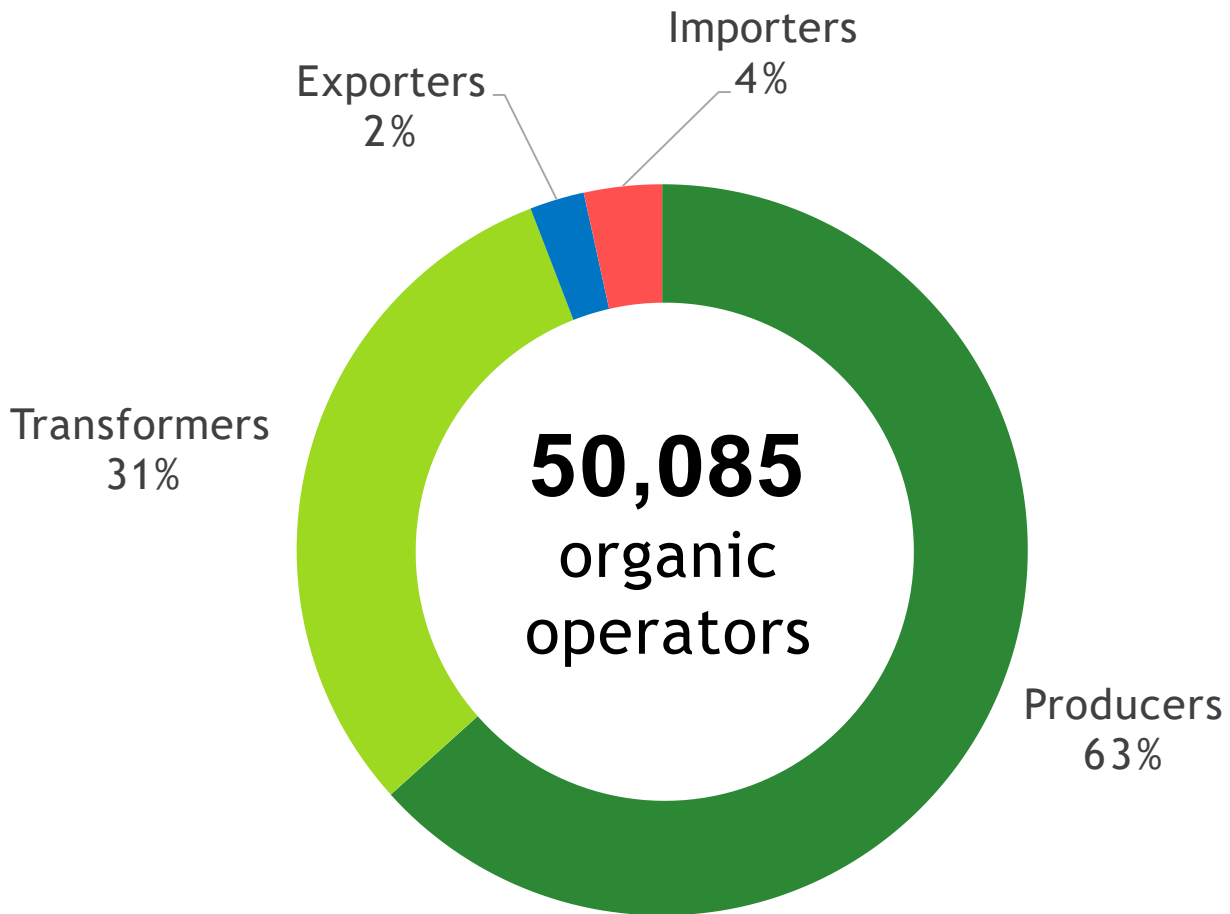
**+53%**  
VS 2010

**+11%**  
VS 2017

\*Utilized Agricultural Area

# ORGANIC OPERATORS

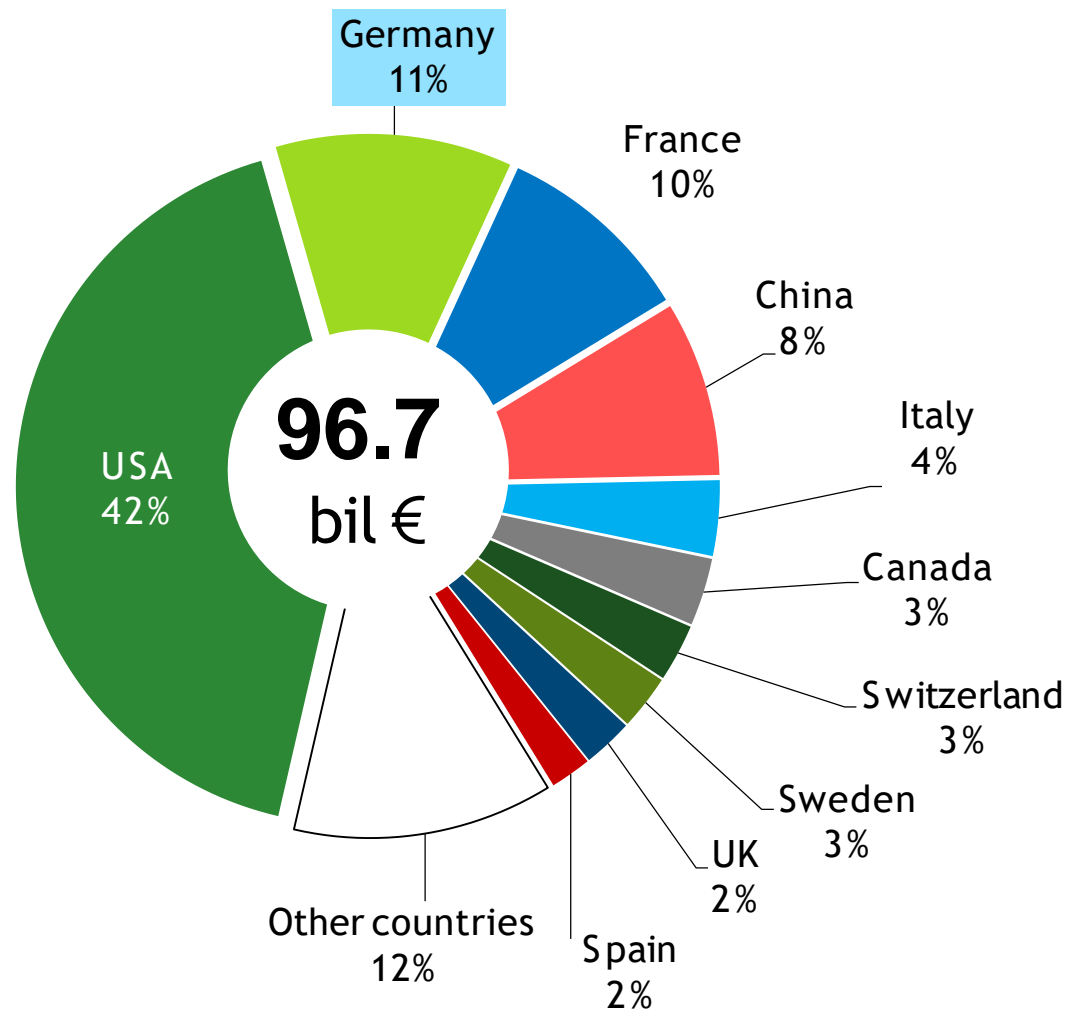
2018, % of organic operators by type



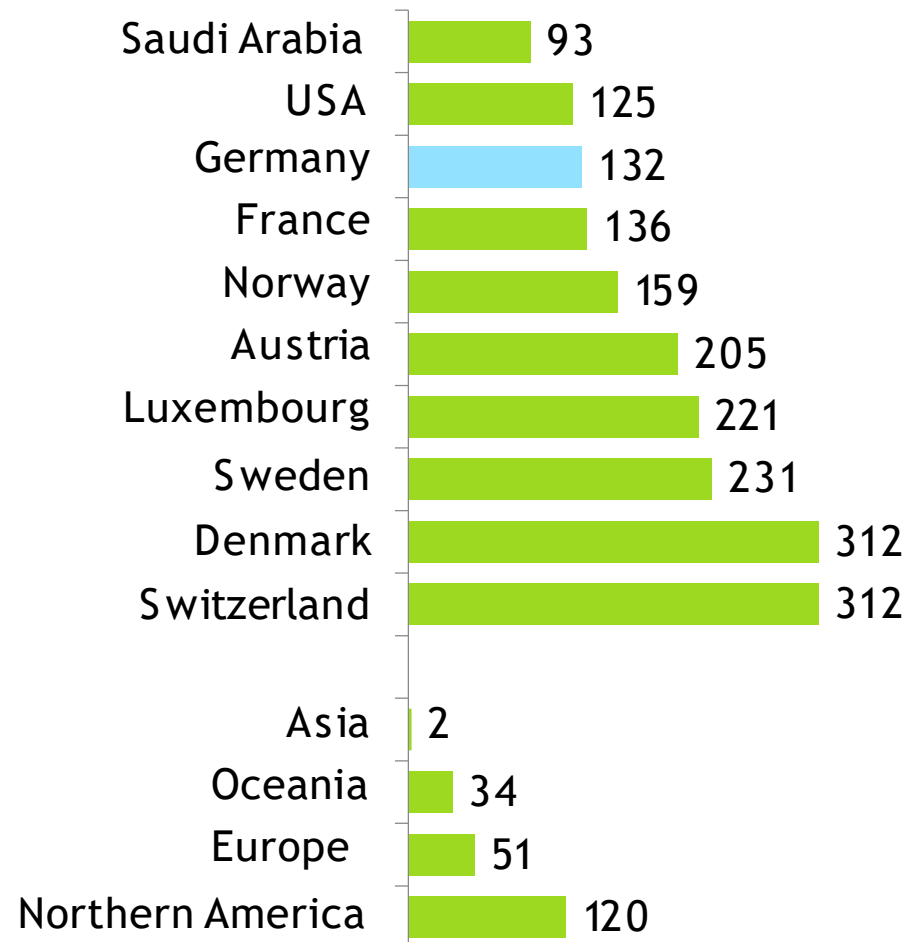
# ORGANIC MARKET: SHARE & PER-CAPITA CONSUMPTION



TOP10 ORGANIC MARKET (2018, value share in %)



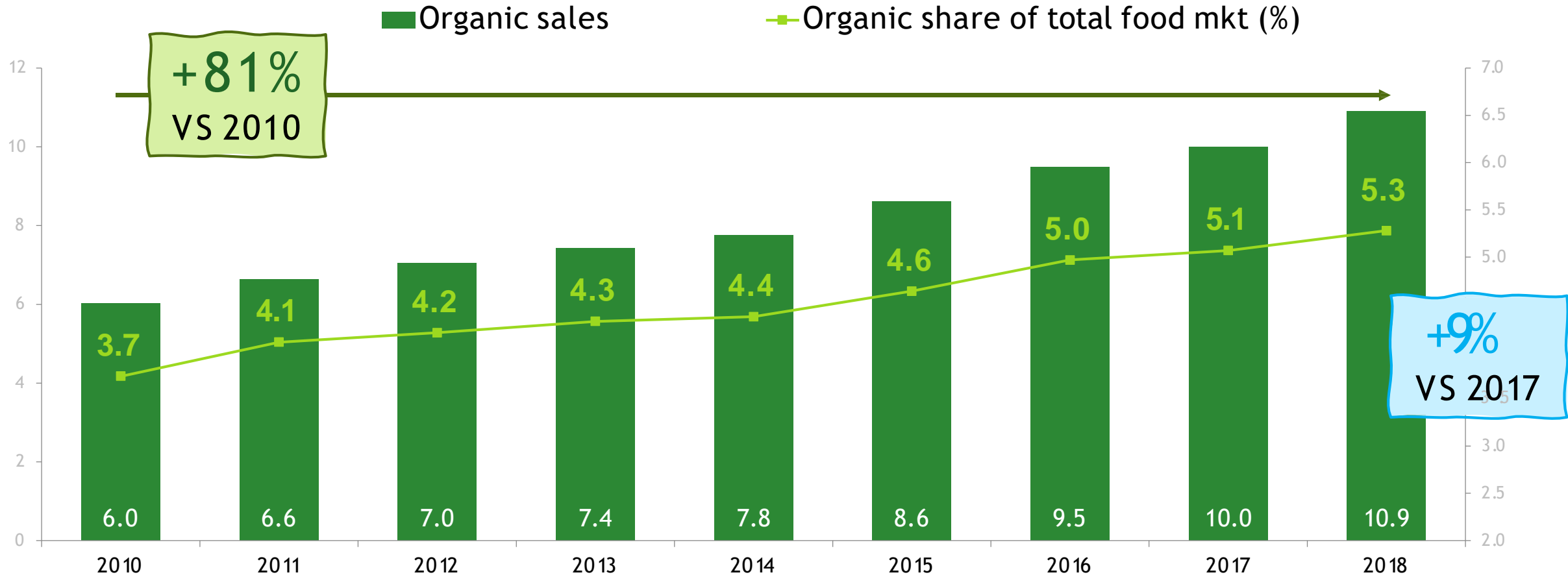
ANNUAL EXPENDITURE (2018, € per capita)





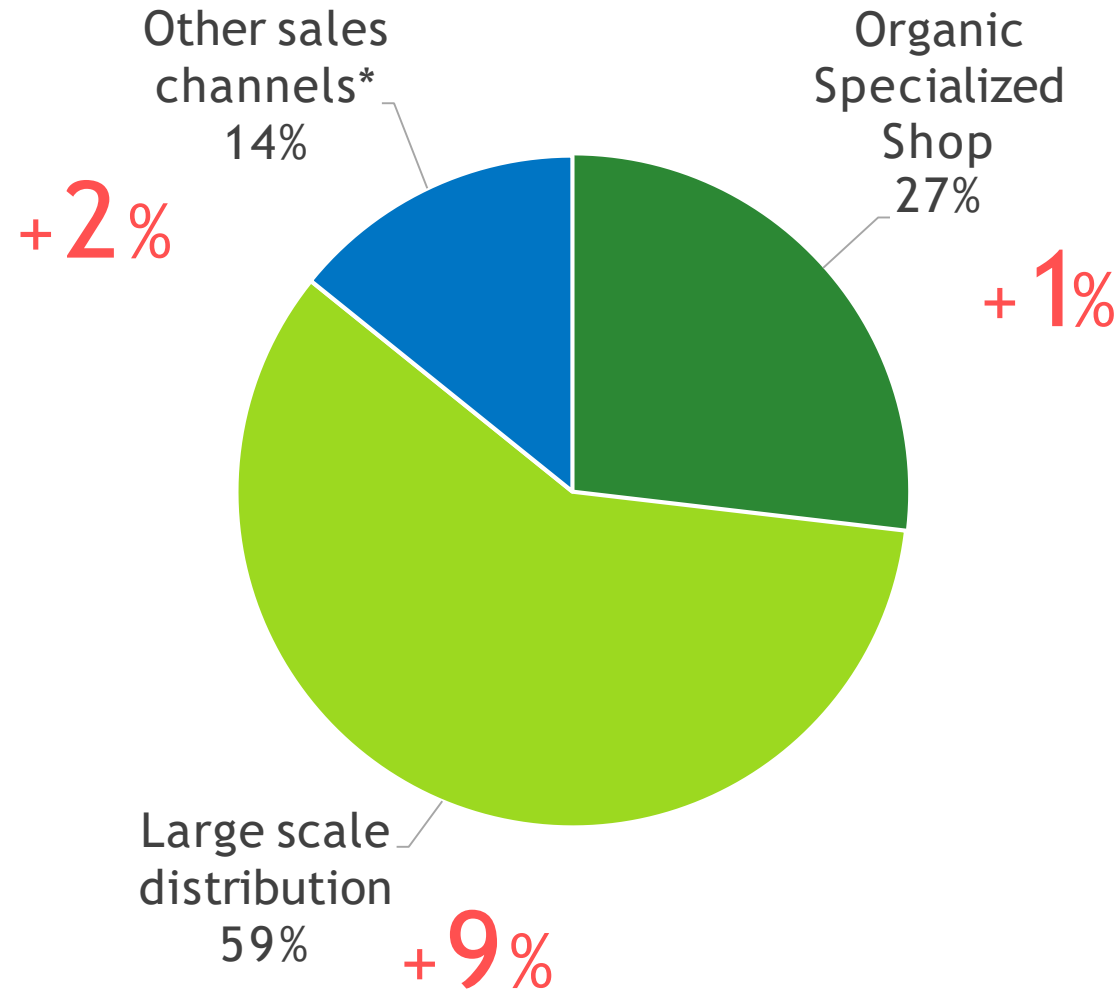
# ORGANIC FOOD SALES

TOTAL RETAIL Trend 2010-2018 (values, billion €)



# ORGANIC TOTAL RETAIL FOOD SALES BY CHANNEL

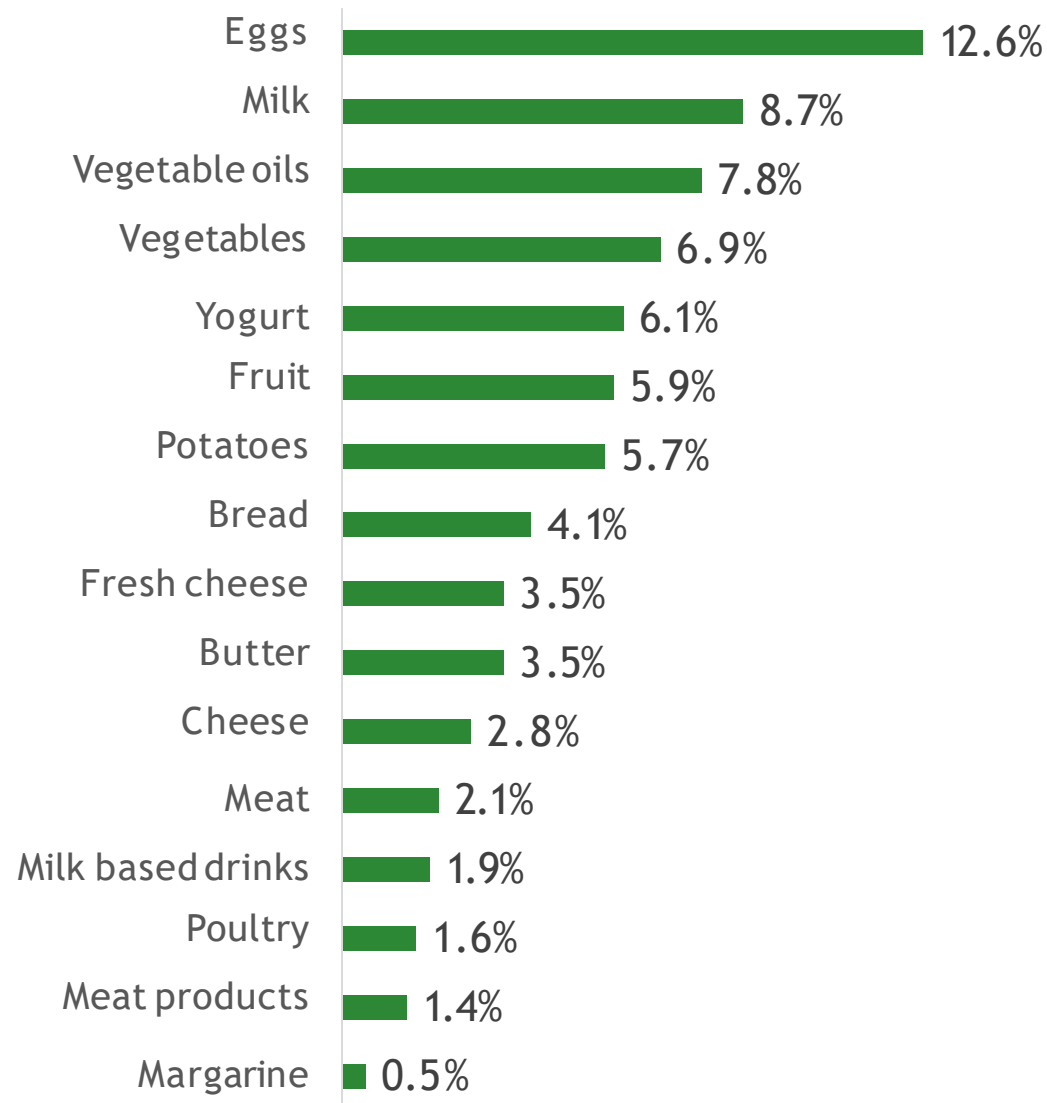
2018 (value share in %), trend 2018/2017



\*Bakeries, butchers, fruit & vegetable shops, farmer's markets, small farm shops, Online...

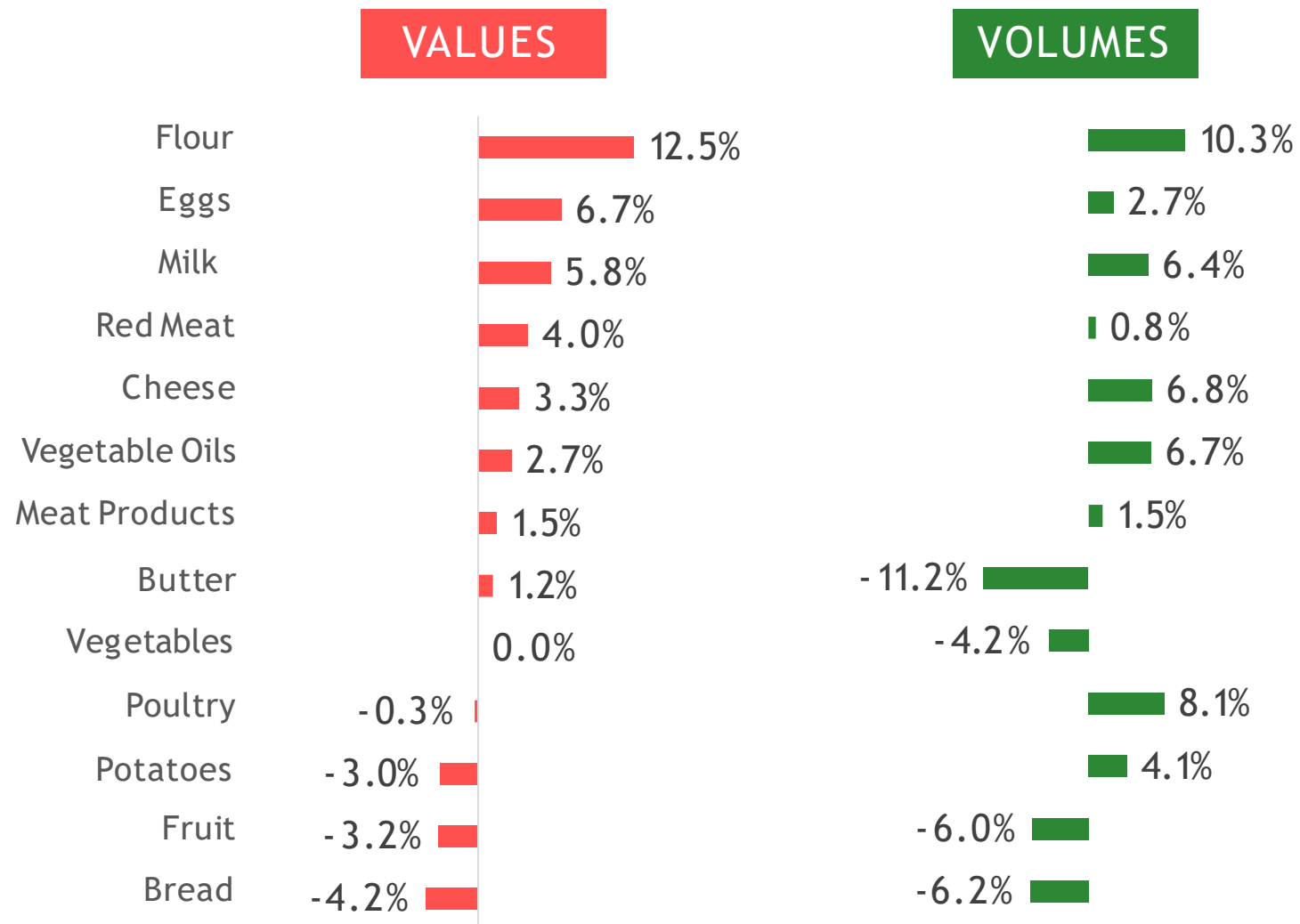
# ORGANIC FOOD SHARE OF DIFFERENT PRODUCTS

Organic shares of household purchases of fresh products in Germany  
(2016, volume shares in %)



# ORGANIC SALES TREND

Growth rates of organic sales of household purchases in Germany (2018/2017)













# CONSUMER SURVEY













## HIGHLIGHTS / 1

-  In Germany, 54% of consumers likes to test the latest products on the shelves. Moreover, 38% of consumers claims “Made in Germany” products and always check the origin of the ingredients.
-  For 41% of consumers “value for money” is the first key buying factor when selecting food products for at home consumption, followed by “green” aspects, with healthiness of the ingredients (18%) and sustainability (9%) being important factors for consumers in selecting food.
-  39% of consumers say that the presence of organic ingredients in the menu is very important.
-  30% of the consumers check the ingredients on the label, and 10% of consumers verify the presence of the organic logo.
-  For consumers, the distinguishing features of an organic product are that it is more natural than conventional ones (for 32% of consumers), but also more expensive (29%).
-  Organic food is consumed by 79% of the population in Germany, with around 40% of population being only occasional consumers of organic food.
-  44% of organic users declares that organic products are responsible for 25% of their household total food expenditure, whilst for 38% of organic users almost 26% to 50% of the food products purchased are organic.
-  Besides “Made in Germany” products, organic users buy organic products from Netherlands (17%), Spain (15%), Italy (12%), France (8%).







## HIGHLIGHTS / 2

-  Higher quality (15%), health and wellness (14%) and respect for animal welfare (14%) are the main reasons why consumers choose organic food products.
-  When purchasing organic products, consumers mostly pay attention to the taste (18%), raw materials/ingredients (15%) and the presence of discounts (11%).
-  91% of consumers indicates that Germany is the country with the best organic products (vs 34% of Italy).
-  EVO Oil (31%) and Fruits&Vegetables (17%) are the Italian most distinctive organic products.
-  The presence of the European or National organic logo allows 53% of consumers to recognize that a food is organic.
-  Bio-Siegel is the most popular logo in Germany (76% of population knows the National organic certification). 58% of people knows the European organic logo; a further 18% of respondents is slightly aware of it.
-  42% of consumers think that the European organic logo provides the same guarantees as the national one (Bio-Siegel), whilst according to 30% of respondents, the best guarantee is always provided by the European organic certification.
-  Among the “technical” aspects concerning the certification of European organic products, only 17% of respondents declared to be familiar with the European regulation, the National guidelines and the specific controls the European organic food undergo.



## HIGHLIGHTS / 3

-  The knowledge of organic food products has risen slightly over the last 3 years for 43% of consumers.
-  Those who currently don't purchase organic products (non-users) are mainly hampered by the price (34%), or because they don't trust the guarantees made by organic certification (17%).
-  The presence of promotions/special offers would encourage 24% of current non-users to buy organic products, while for 11% of them the encouraging factor would be the curiosity after a food tasting in stores.
-  The users of organic food claim to have discovered new organic products by simply finding them on the shelf (37%) or because of a promotion/discount in stores (14%).





# CONSUMER SURVEY

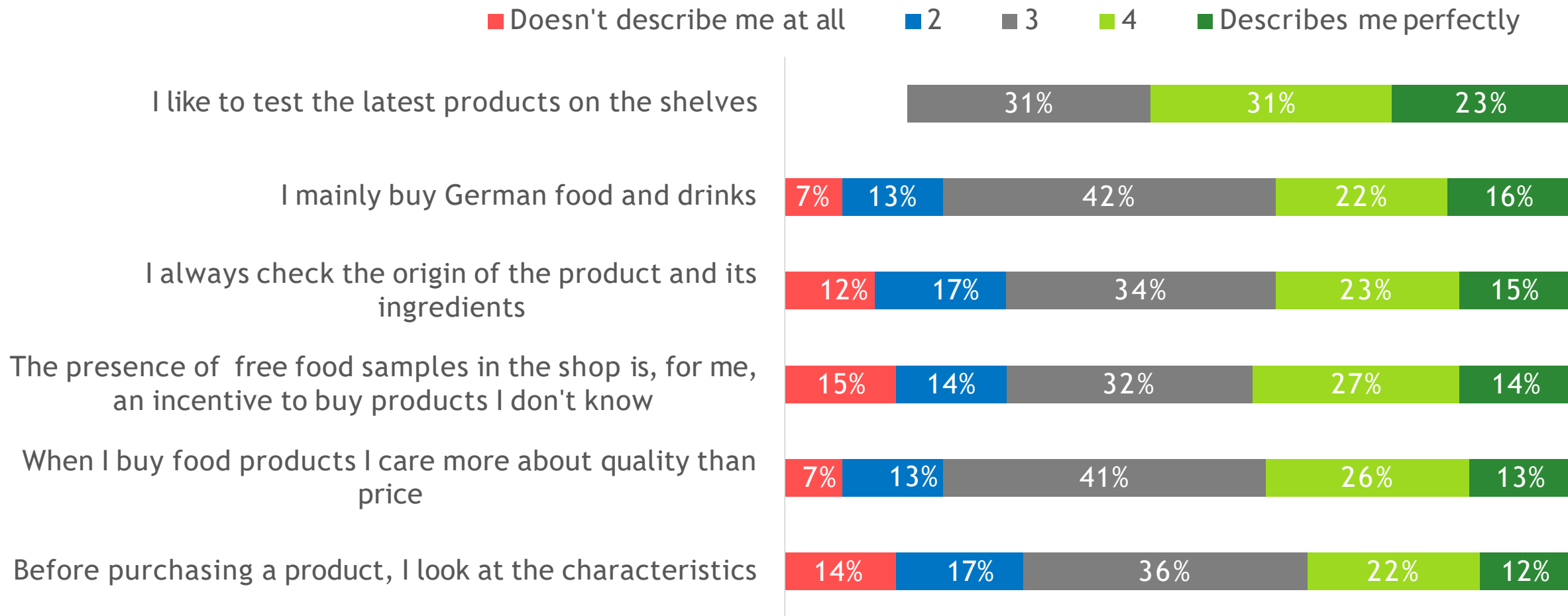


Consumption habits:  
the role of «Organic»



# SOME TRENDS IN CONSUMPTION BEHAVIOR

Which of these best describes your buying of food and drink products?

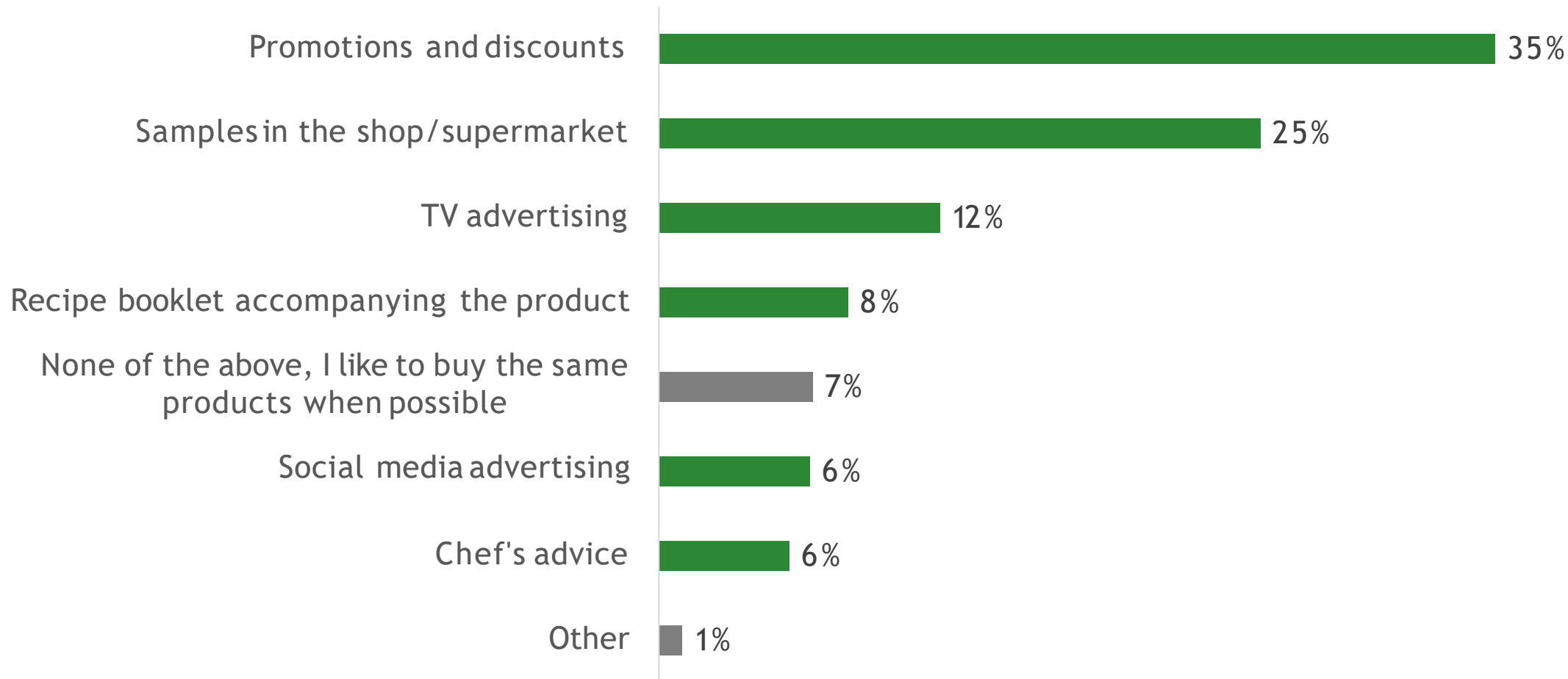




# INCENTIVES TO TRY A NEW FOOD PRODUCT

Which of these would make you try a new food product?

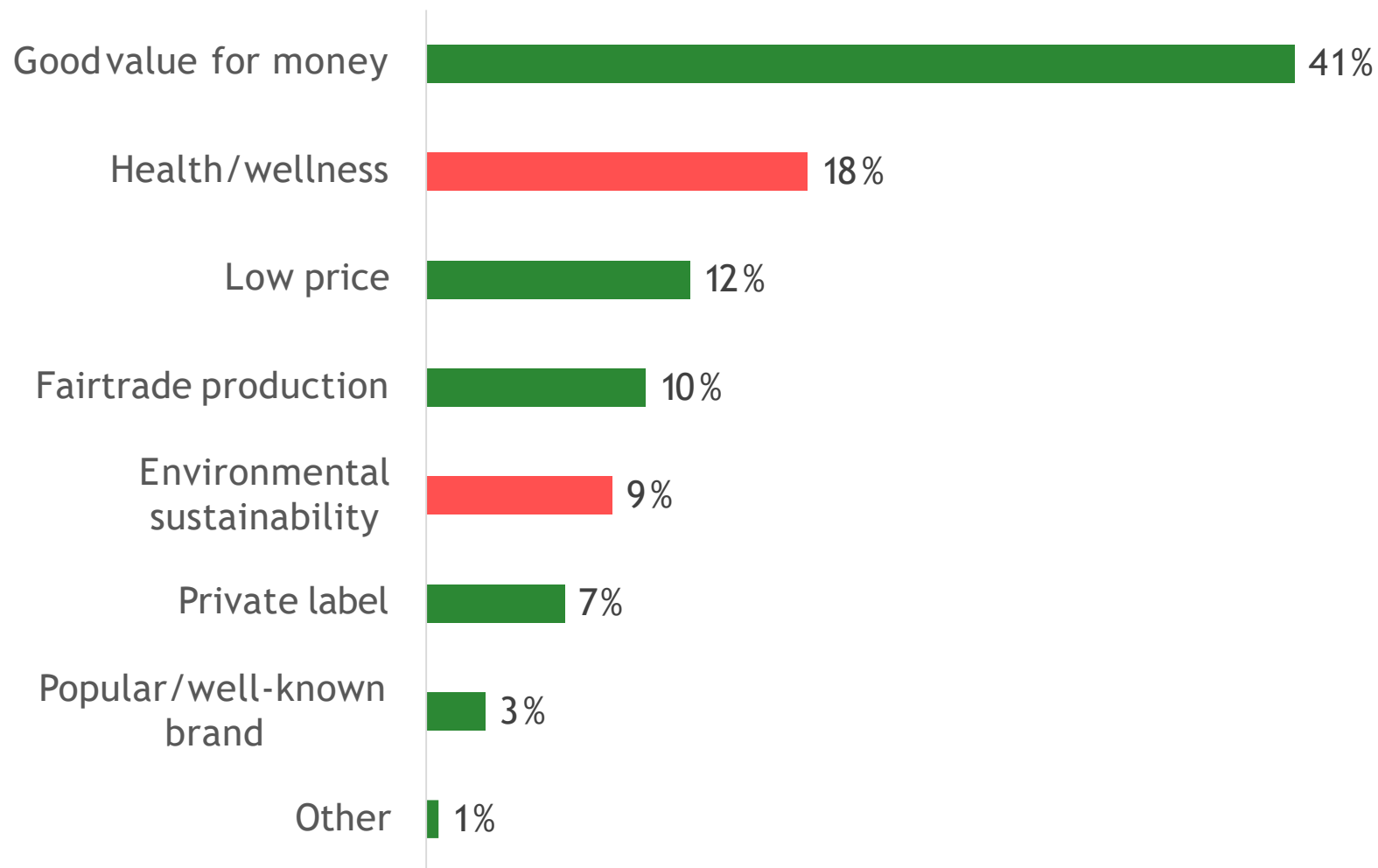
(First answer in order of importance)





# «GREEN» FACTORS AND PURCHASE DECISIONS

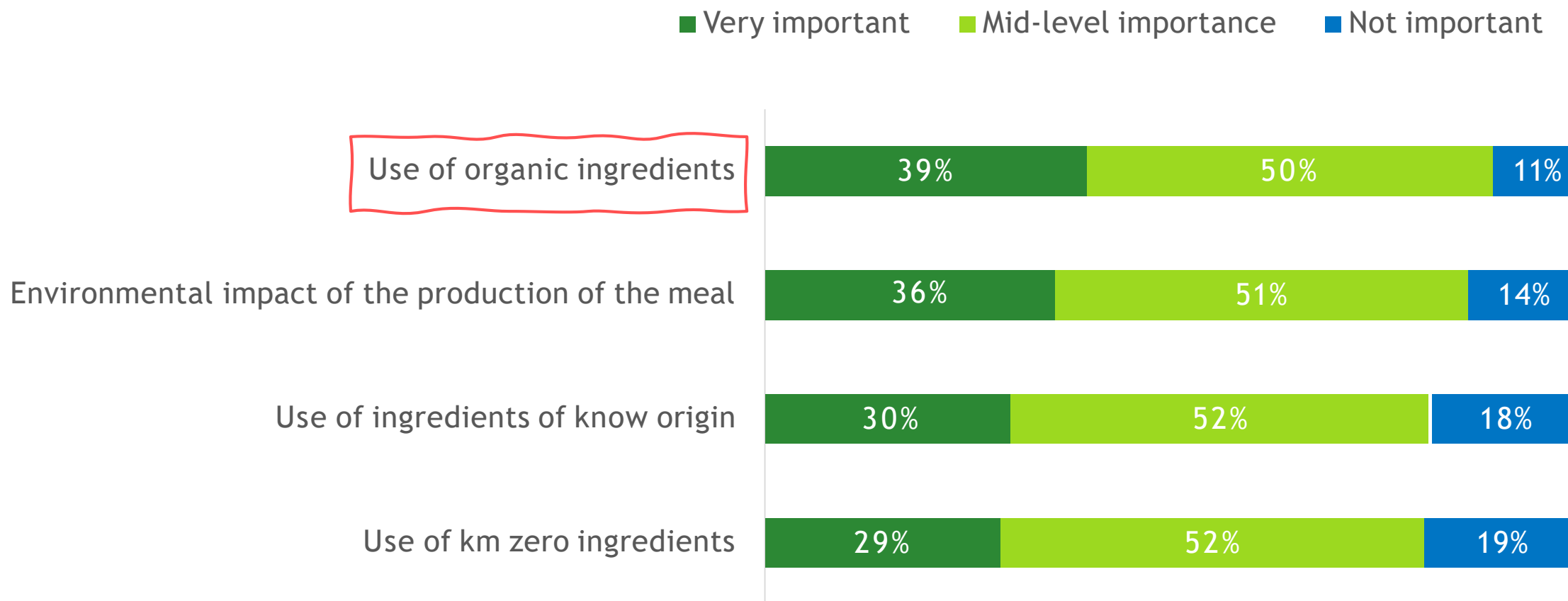
Please rate the importance of the following items when you shop for food for yourself or your family  
(First answer in order of importance)





# «GREEN» FACTORS AND THE AWAY FROM HOME

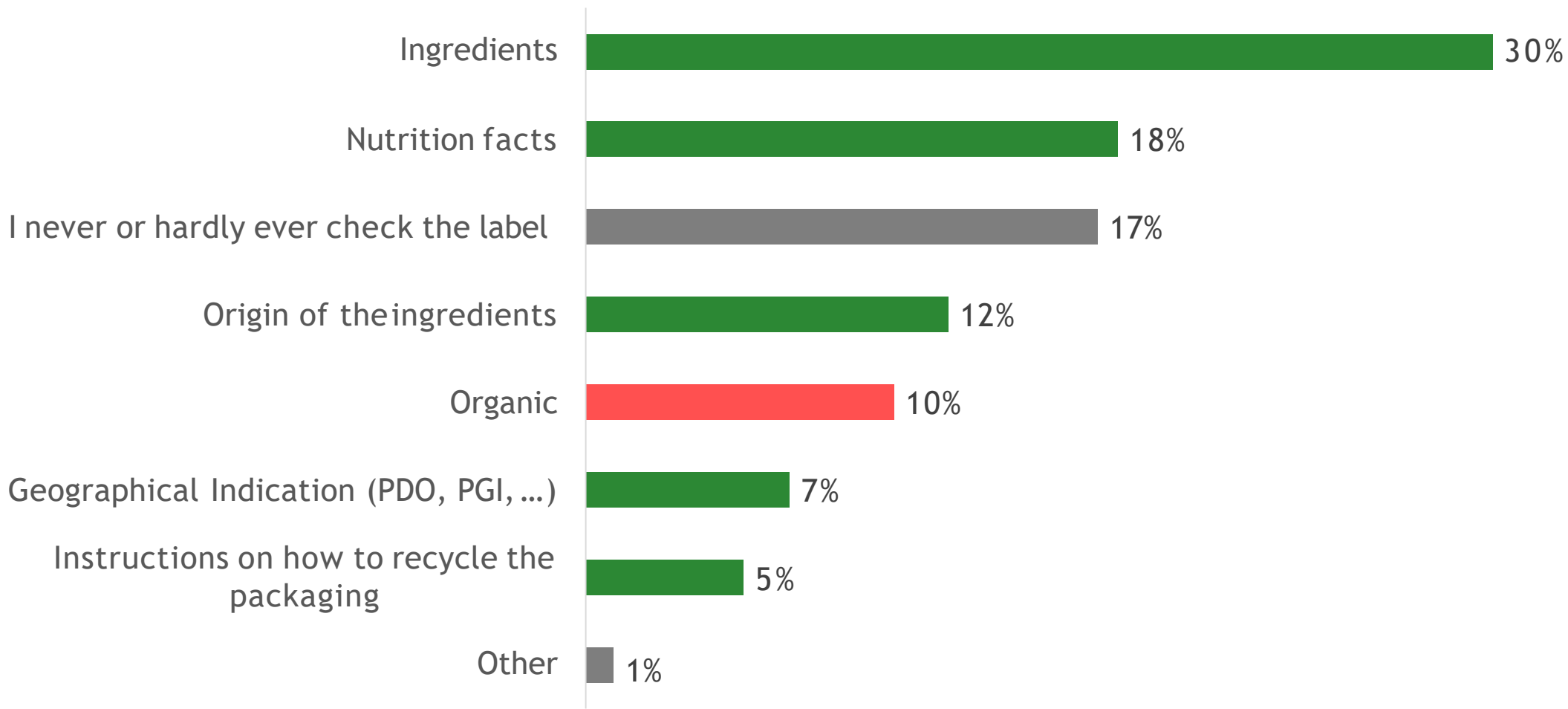
In particular, when you chose what to eat at a restaurant/bar, which of the following is most important to you?





# ROLE OF THE BIO LABEL ON THE PACKAGING

When you buy food products for yourself or your family, what information do you check on the label/packaging?  
 (First answer in order of importance)

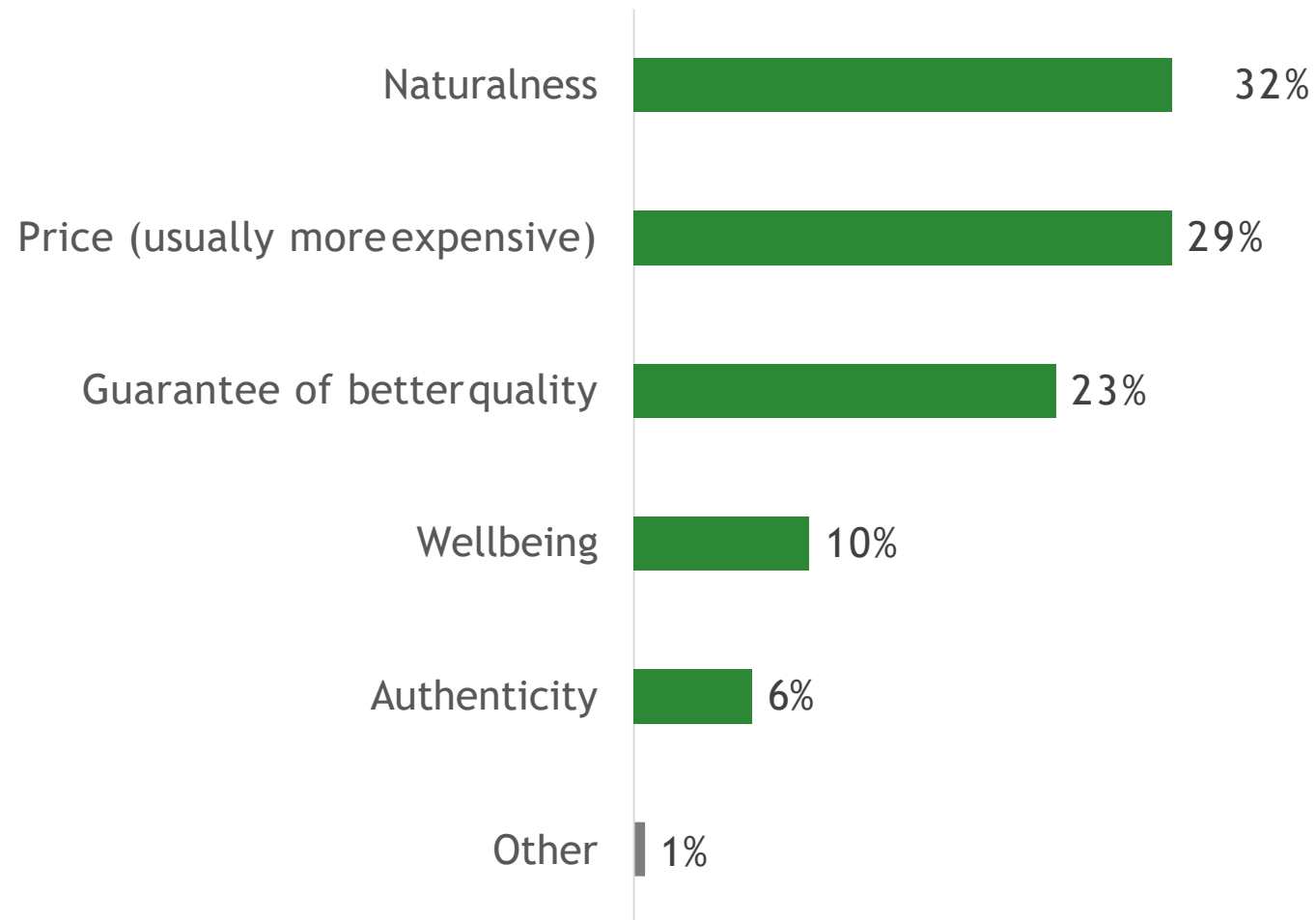


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# PERCEPTION OF ORGANIC FOOD

Regardless of what you actually buy, in your opinion what distinguishes organic from conventional food?  
(First answer in order of importance)



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# CONSUMER SURVEY



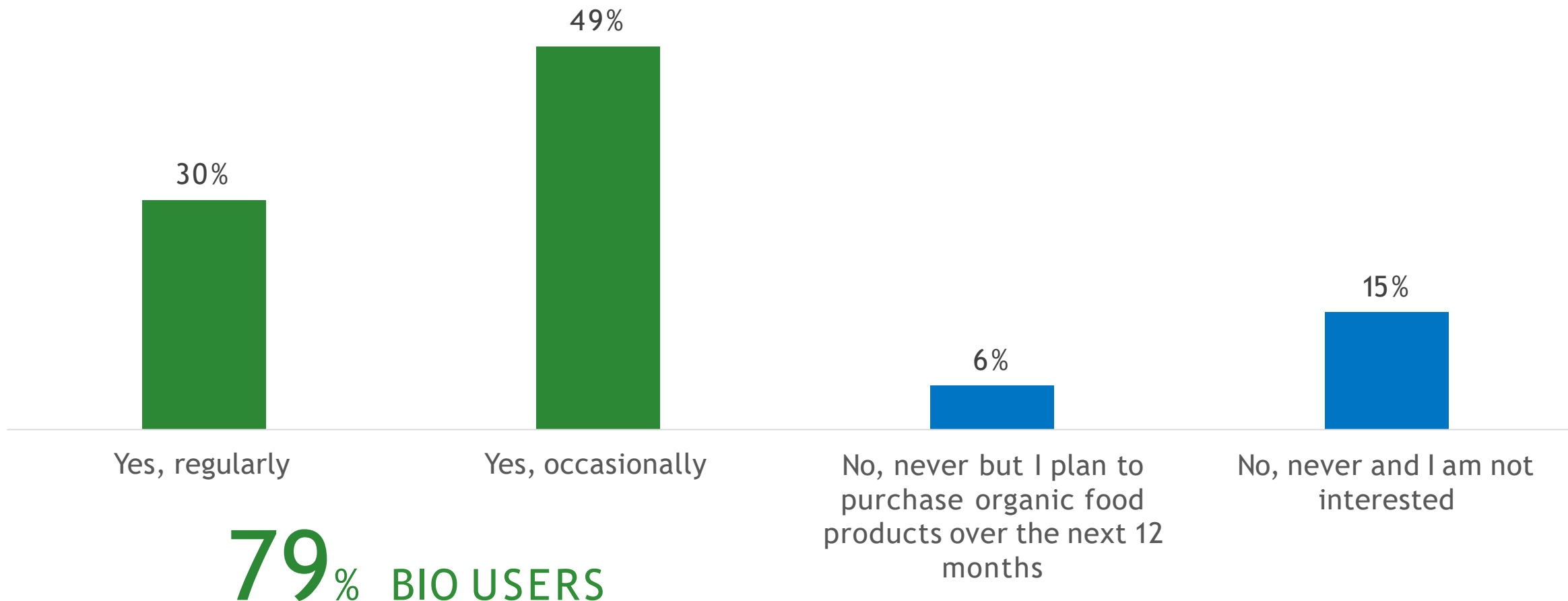
Consumption of organic  
food & beverages





# ORGANIC F&B: CONSUMER BASE

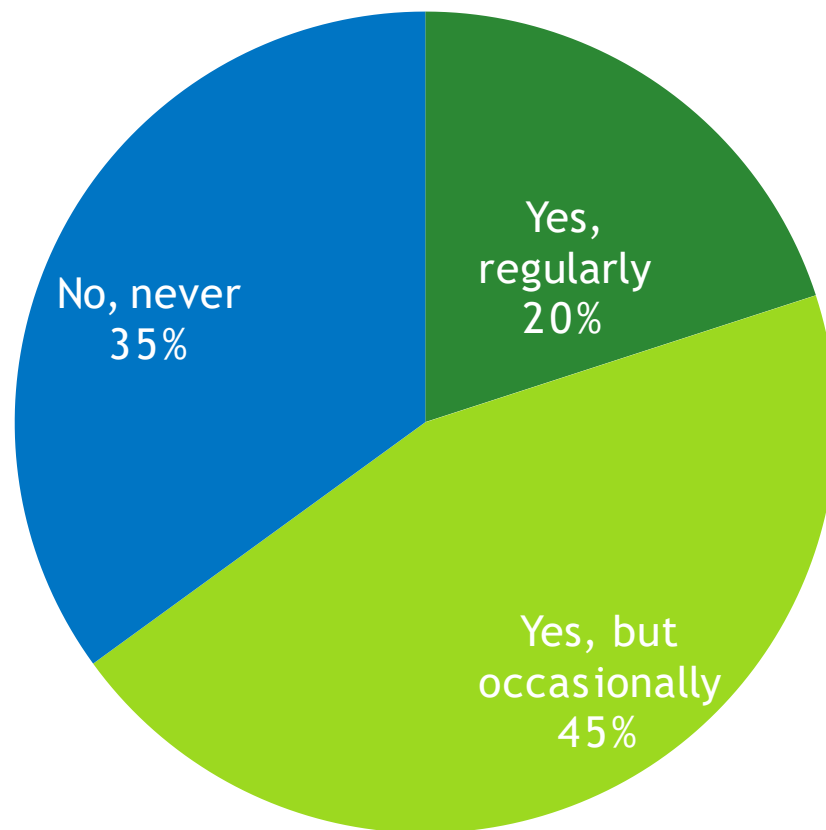
Over the last 12 months have you purchased at least one ORGANIC FOOD PRODUCT, for yourself or your family?  
(First answer in order of importance)





# BIO AWAY FROM HOME: CONSUMER BASE

Now think about your eating habits away from home. Over the last 12 months, have you had breakfast/lunch/dinner with organic food/drinks or ingredients at a restaurant, café, bar or other venue?

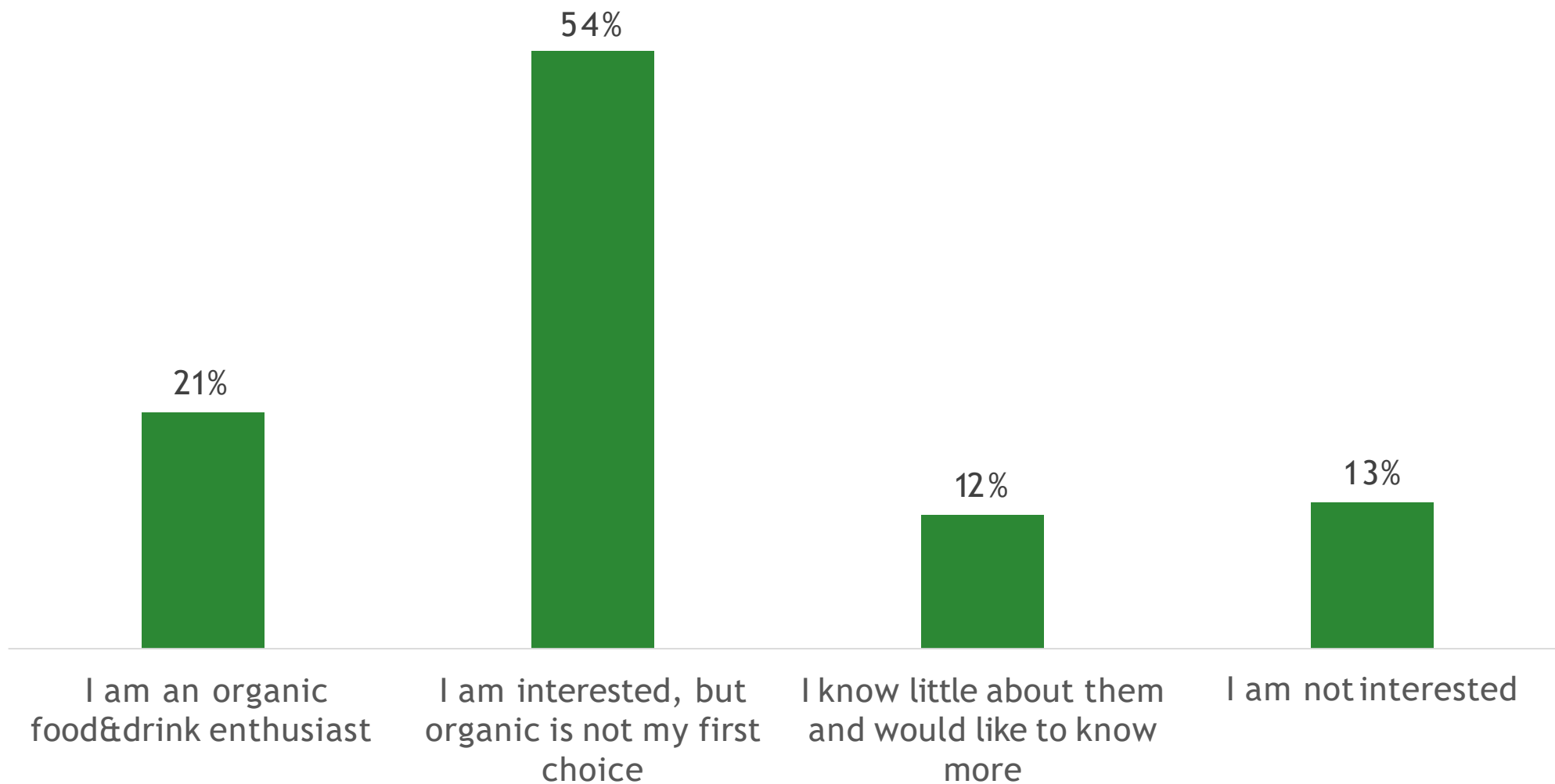


**65% BIO USERS**  
Away From Home



# BIO: «LOYALTY RATE»

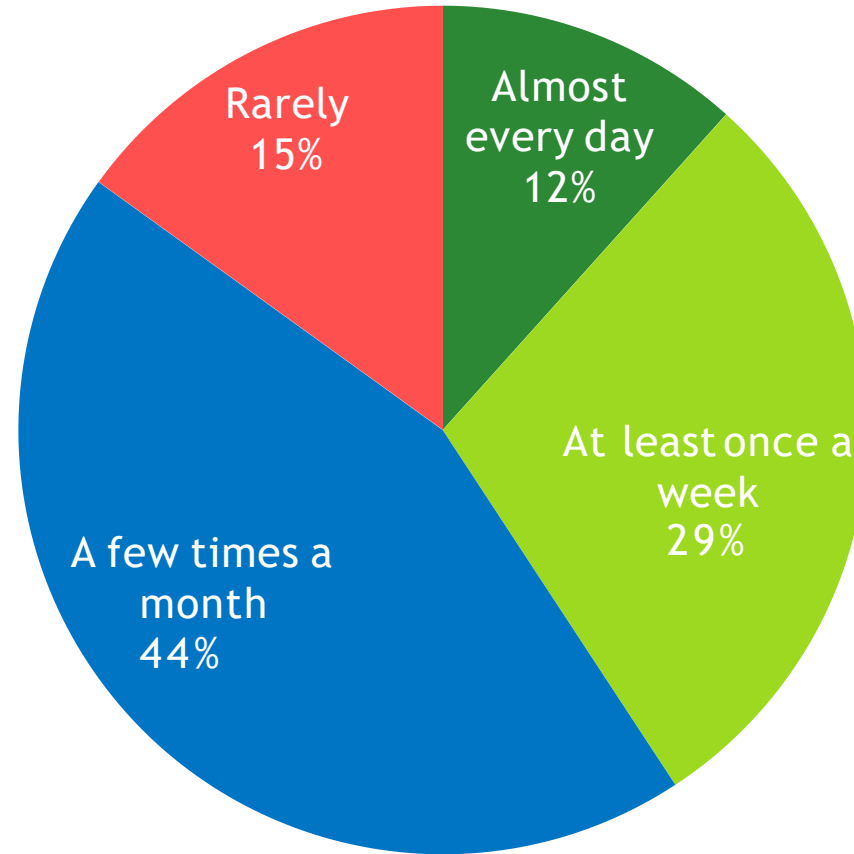
Which of the following statements best describes your position on organic products?





# CONSUMPTION'S FREQUENCY OF ORGANIC FOOD

How often does your family consume, on average, organic food and beverage?

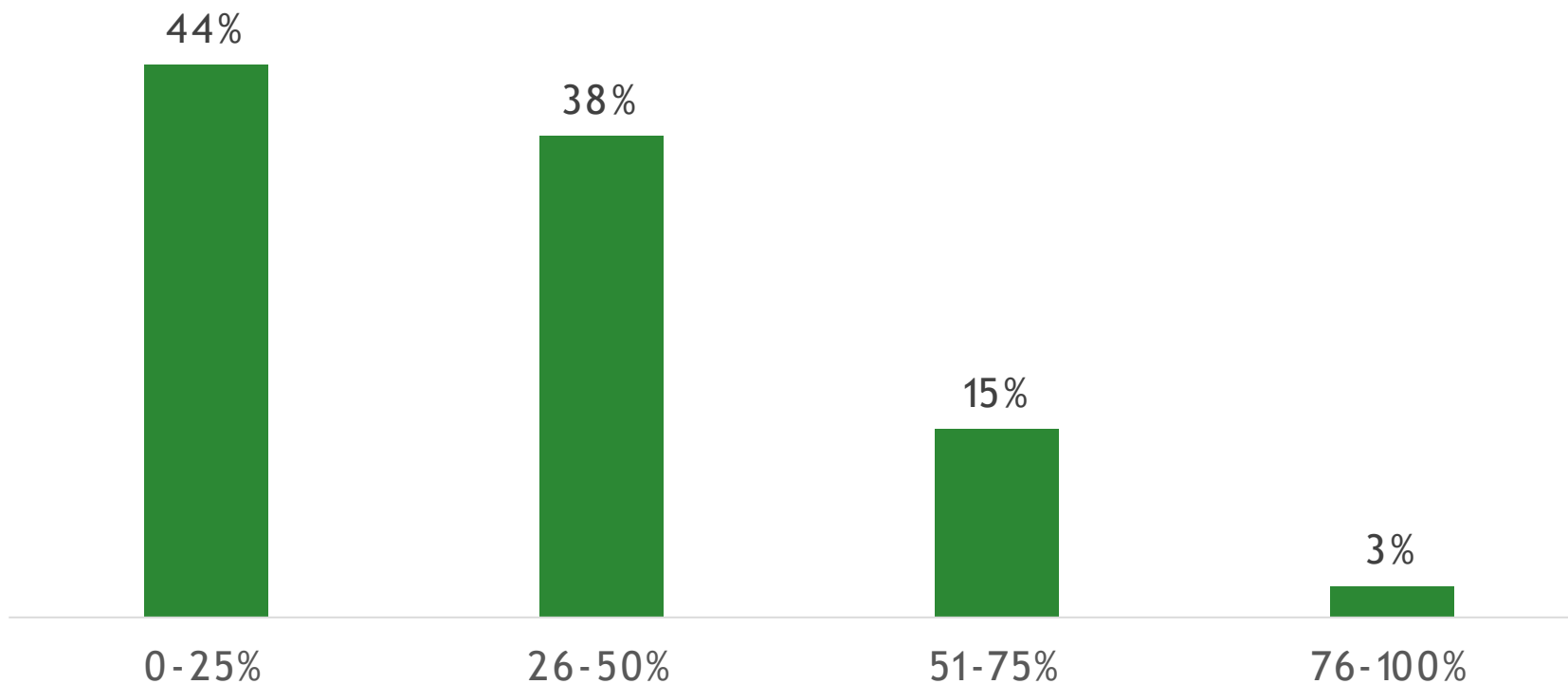


41% frequent user



# ORGANIC RATE ON TOTAL FOOD

Over the last year, what was the share of certified organic products in your total household food purchases?

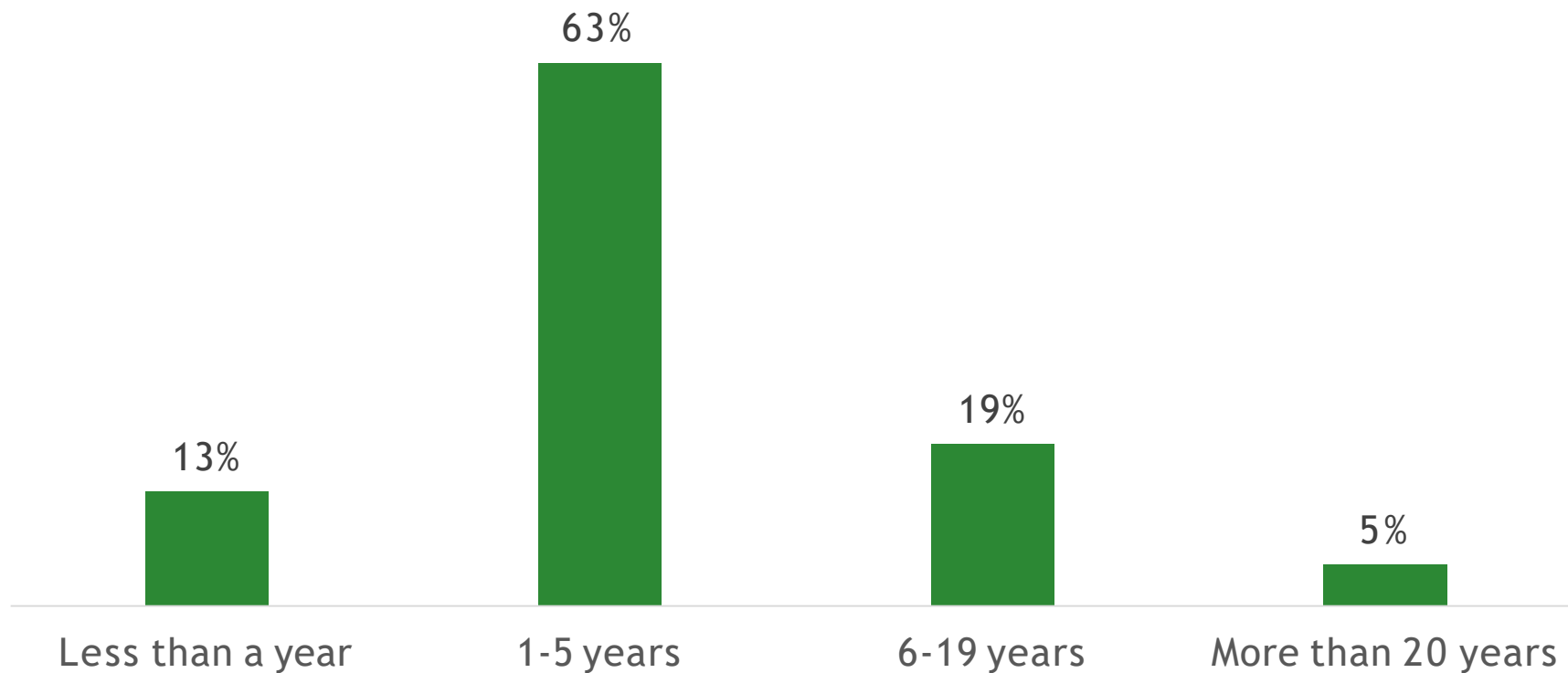


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# DURATION OF ORGANIC FOOD CONSUMPTION

How long have your family been purchasing organic food products?

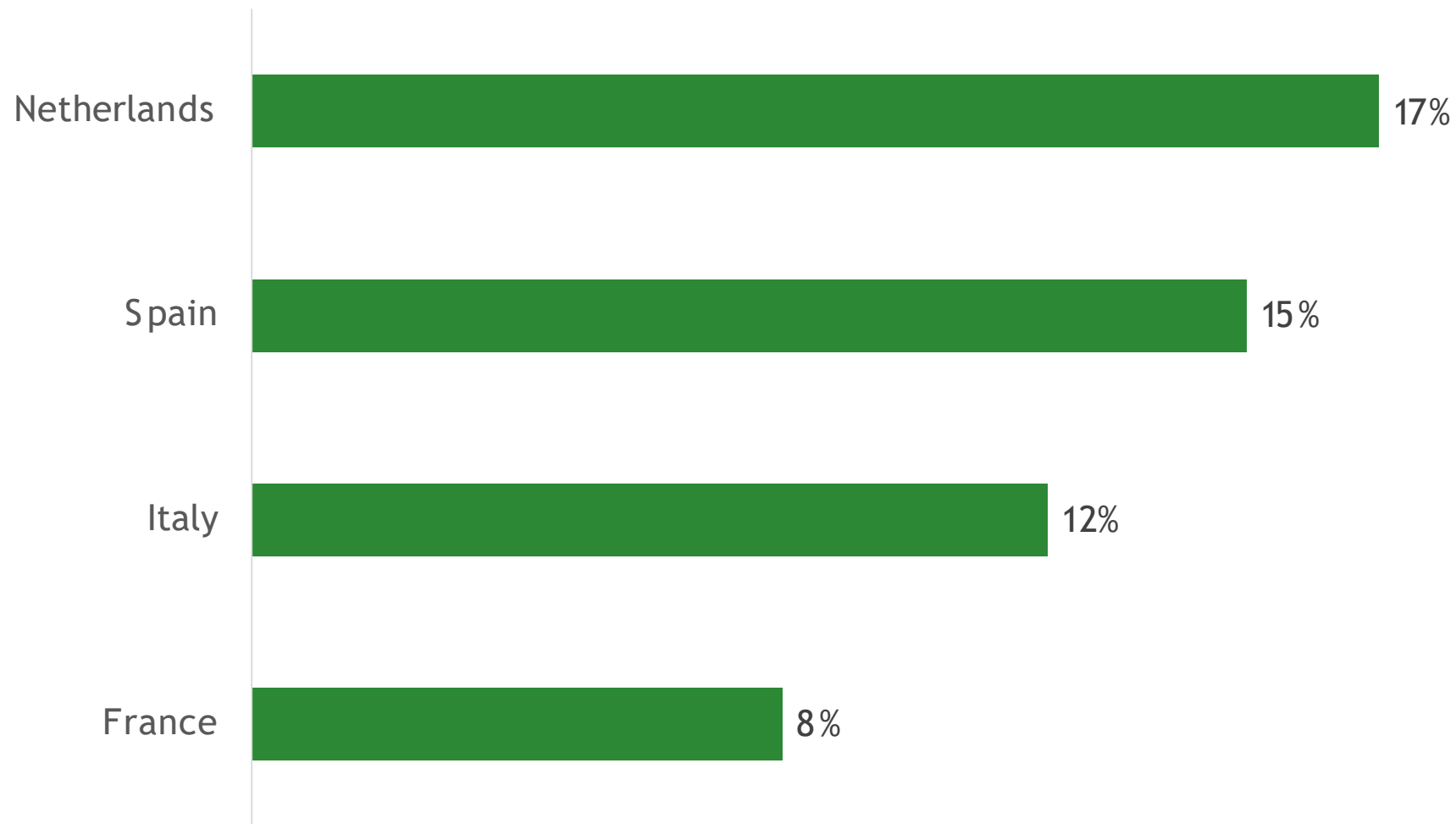




# BIO: CONSUMER BASE BY COUNTRY

Where do the certified organic food products you buy come from?  
(Multiple answers)

France  
100%

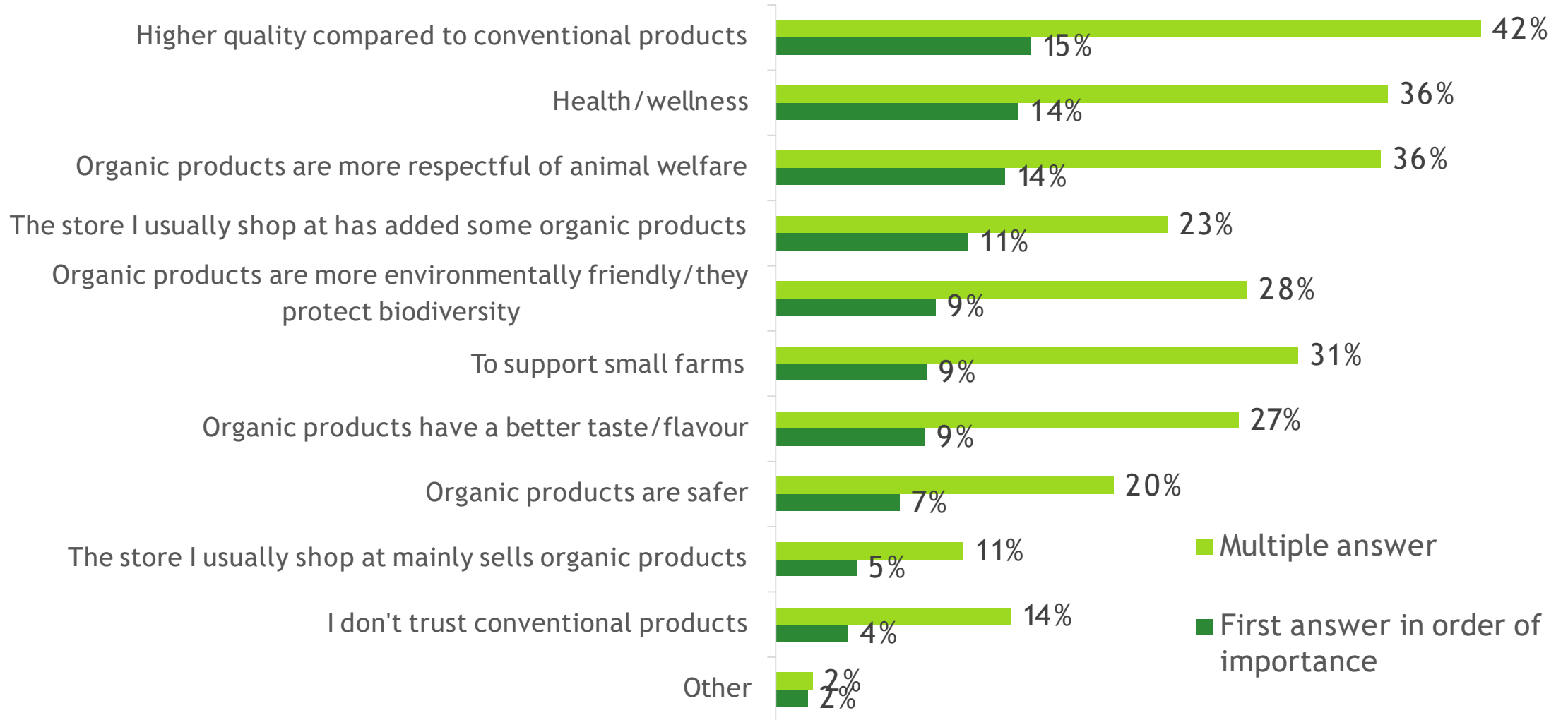


The answer «Germany» was excluded from the graph  
% run on BIO USERS



# ORGANIC PRODUCTS: REASONS TO BUY

What are the reasons that made you buy organic products for yourself or your family?



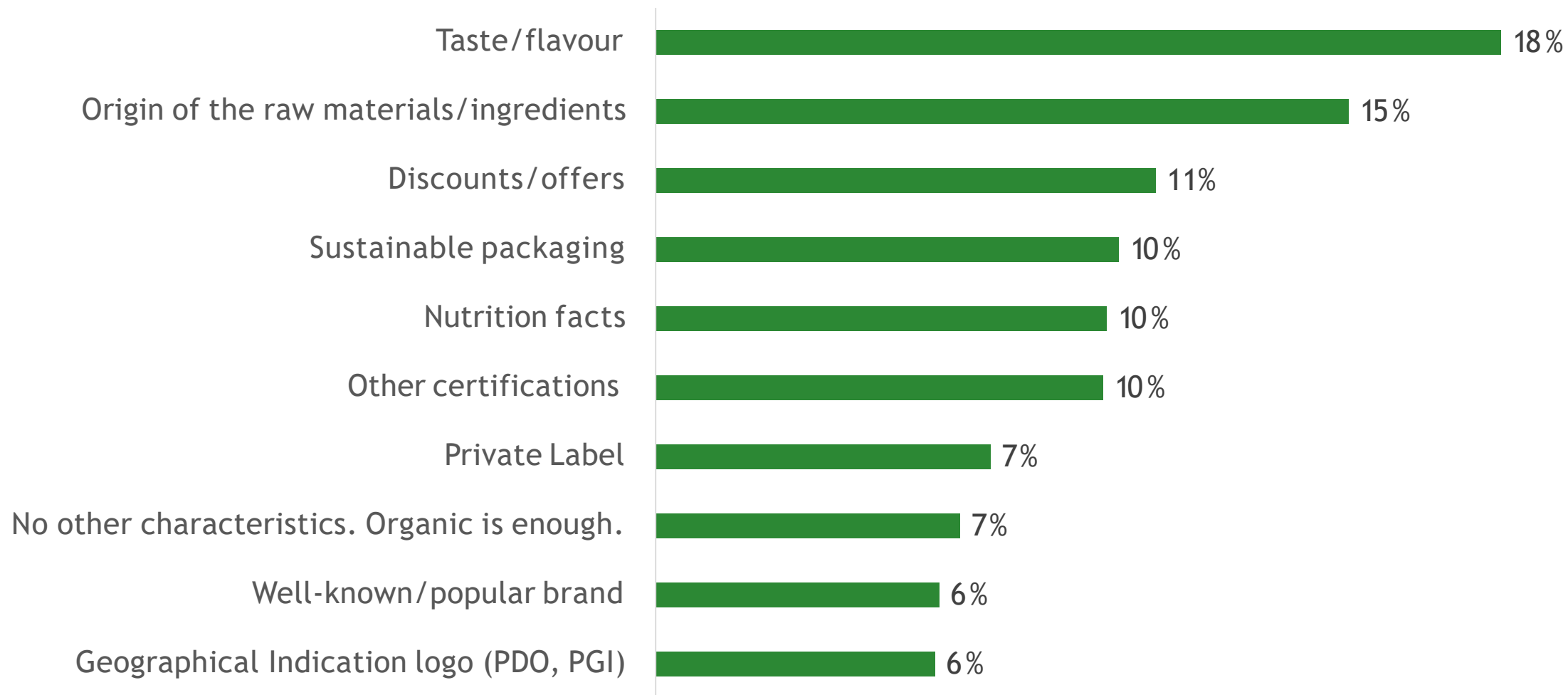




# ORGANIC PRODUCTS: SELECTION CRITERIA

When you buy organic food products, what characteristics catch your attention?

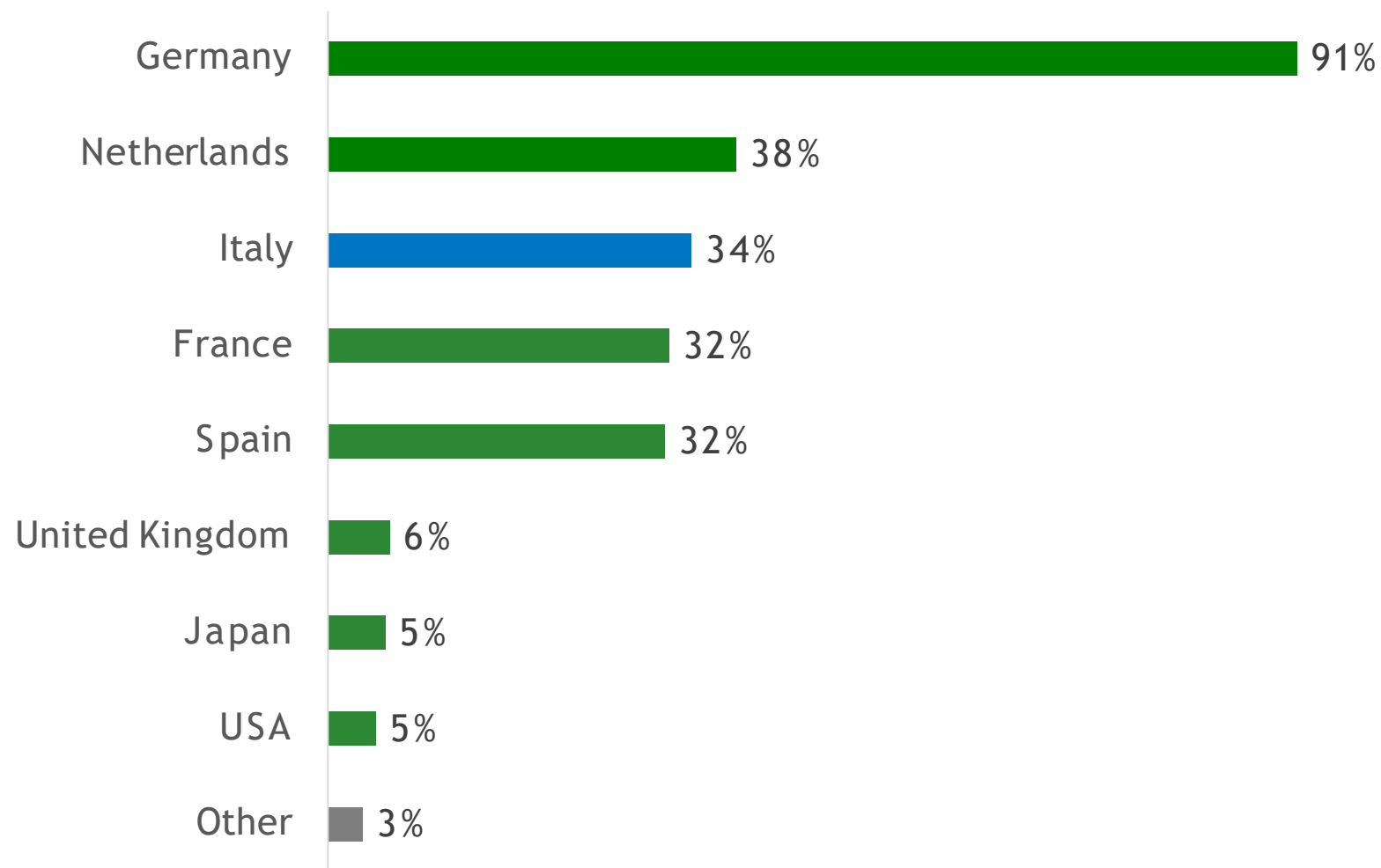
(First answer in order of importance)



# BIO ORIGIN: POSITIONING OF ITALY



Regardless of what you actually buy, when you think about organic food products, which of the following countries come to your mind?  
(Multiple answers)



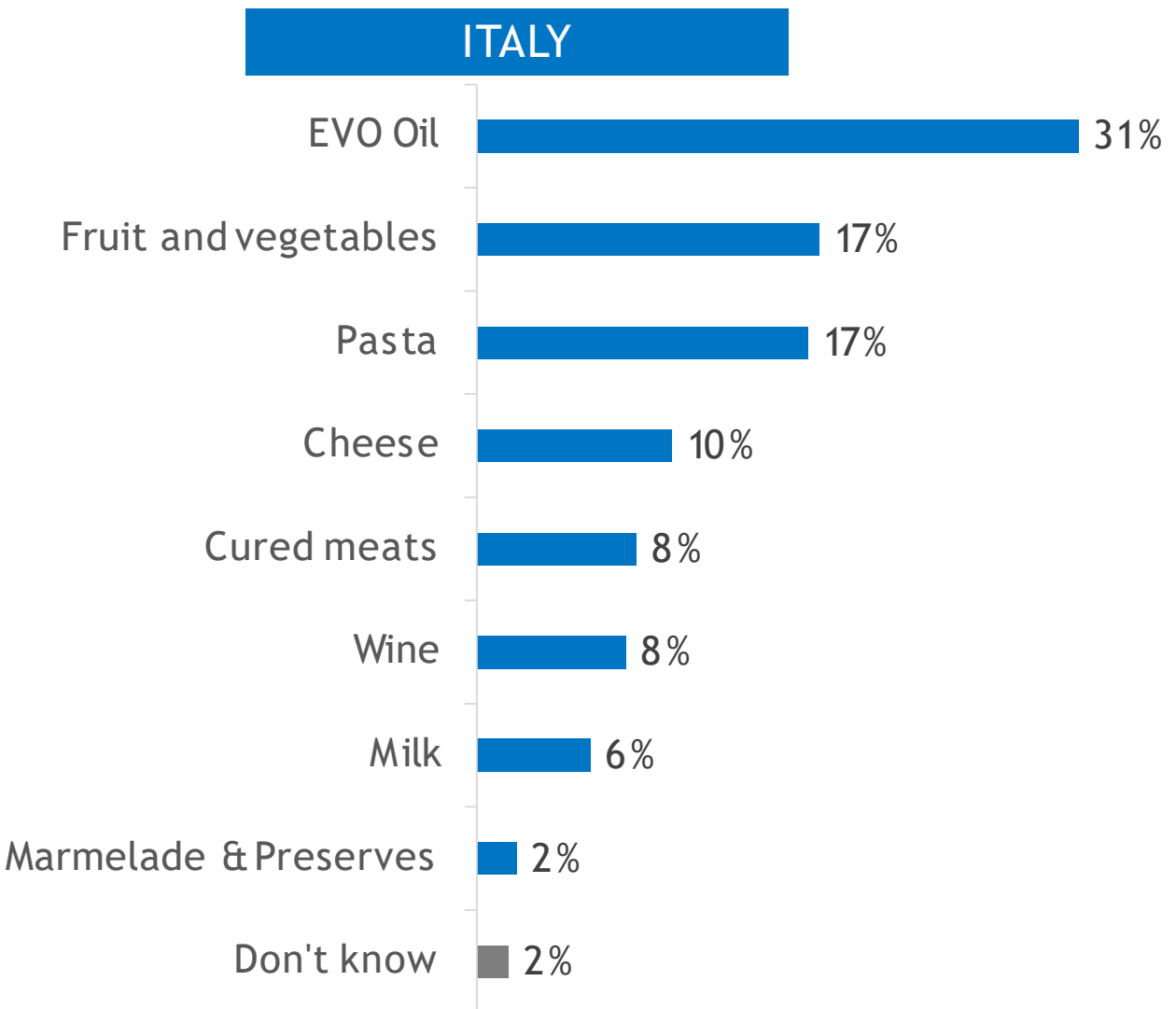
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# BIO MADE IN ITALY: TOP PRODUCTS

In particular, according to you, what are the most distinctive organic products produced in Italy?

(First answer in order of importance)



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# CONSUMER SURVEY



Awareness & Perception  
of the organic  
certification

# ROLE OF THE NATIONAL/EUROPEAN LOGO ON THE LABEL



How do you recognize an organic product?

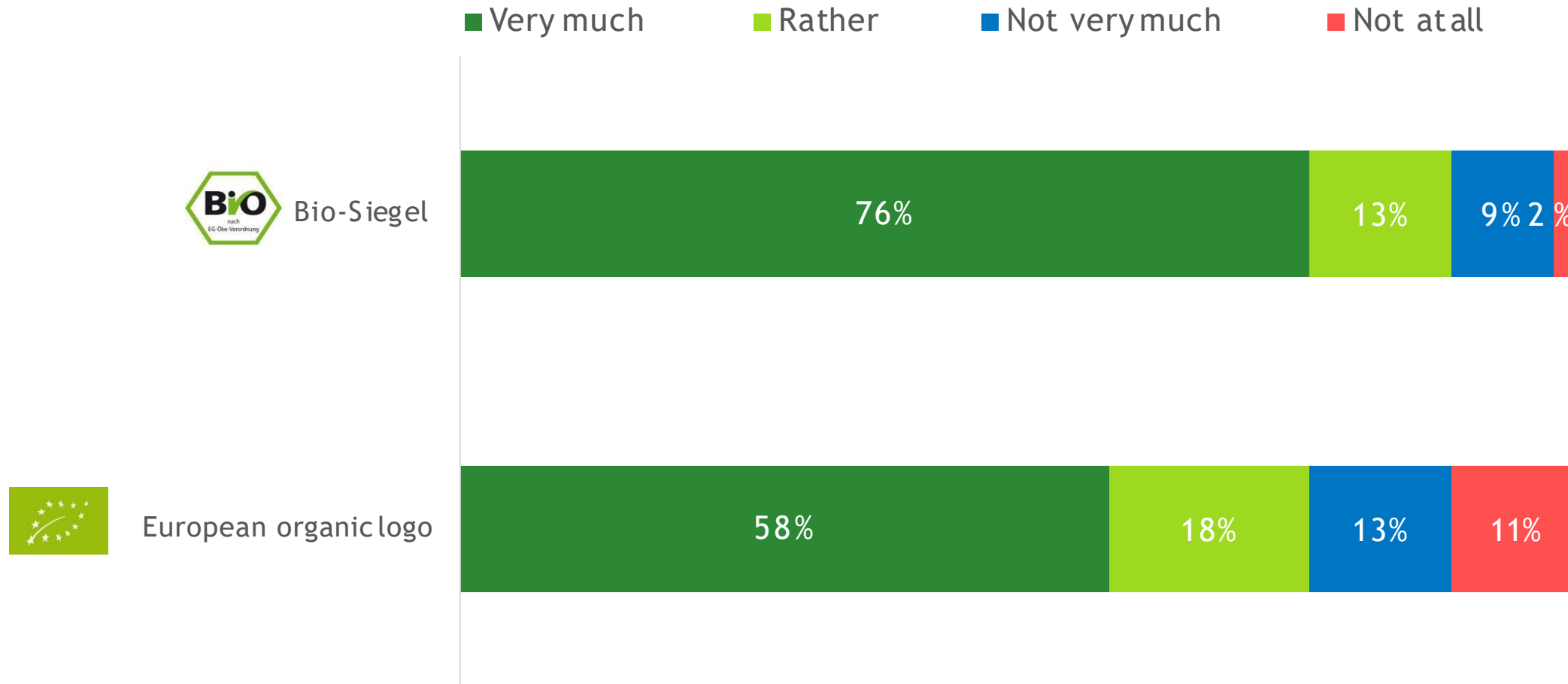
(First answer in order of importance)





# KNOWLEDGE OF ORGANIC LOGO

Which of the following ORGANIC LOGO do you know?



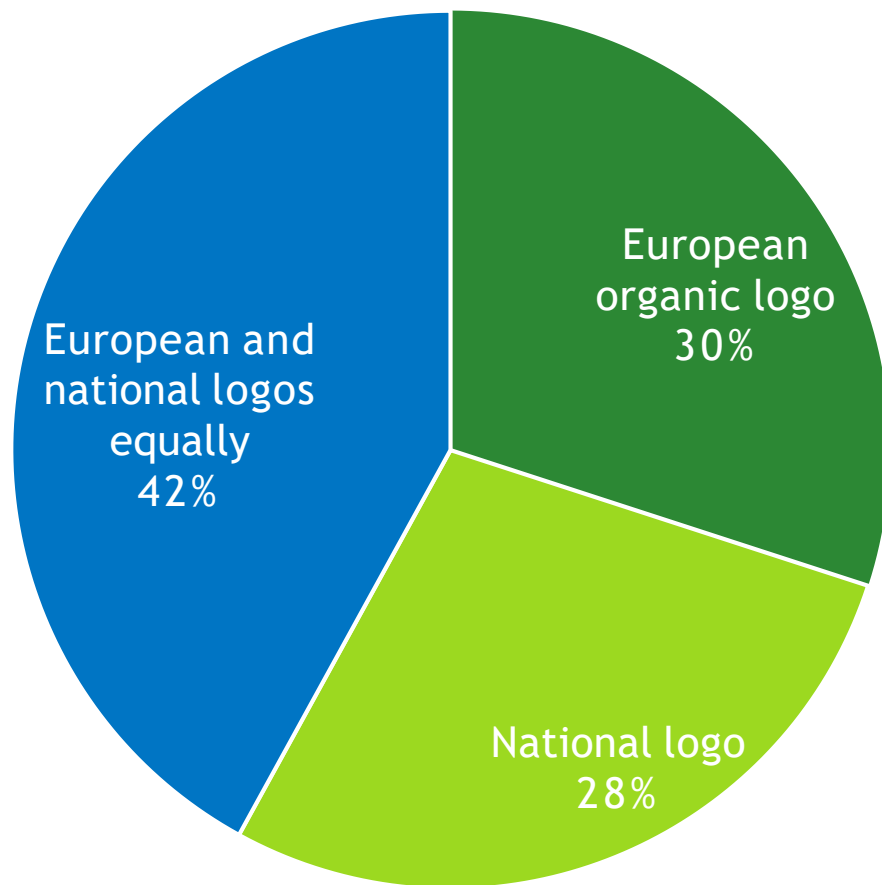
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# EUROPEAN VS NATIONAL ORGANIC LOGO

In your opinion, which organic LOGO offer the best guarantees to consumers?

(First answer in order of importance)

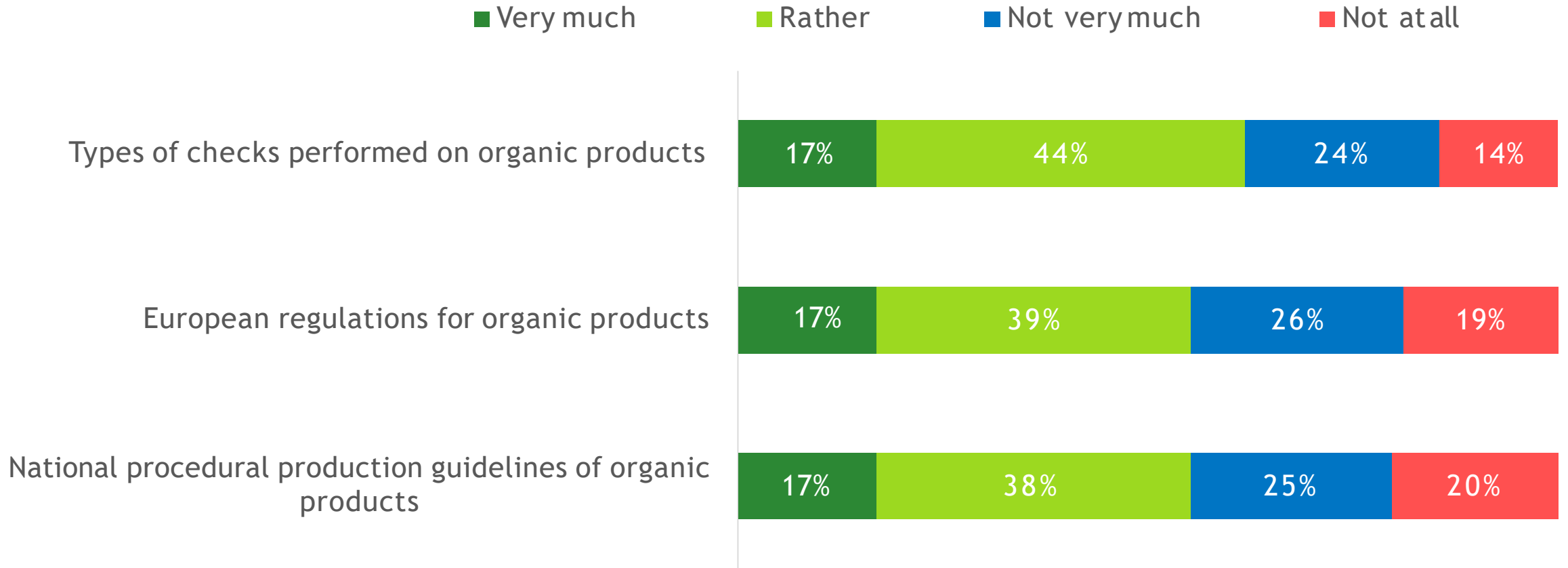


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# KNOWLEDGE OF SPECIFIC ASPECTS

Listed below are some aspects of certified organic products. For each one indicate to what extent you know it or have heard of it



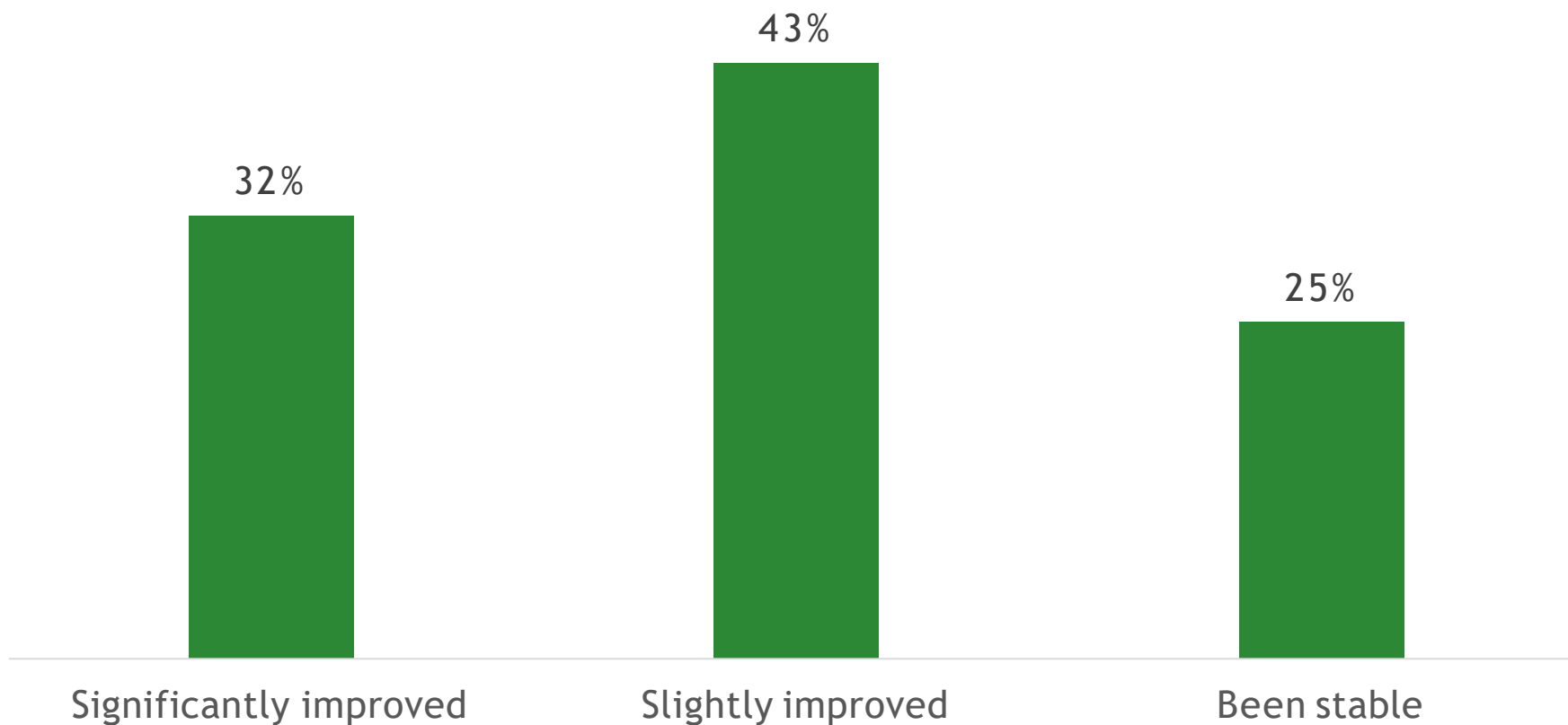
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# KNOWLEDGE LEVEL: TRENDS OVER THE LAST YEARS

Over the last 3 years, your KNOWLEDGE of organic products has...



*% run on total sample*



# CONSUMER SURVEY



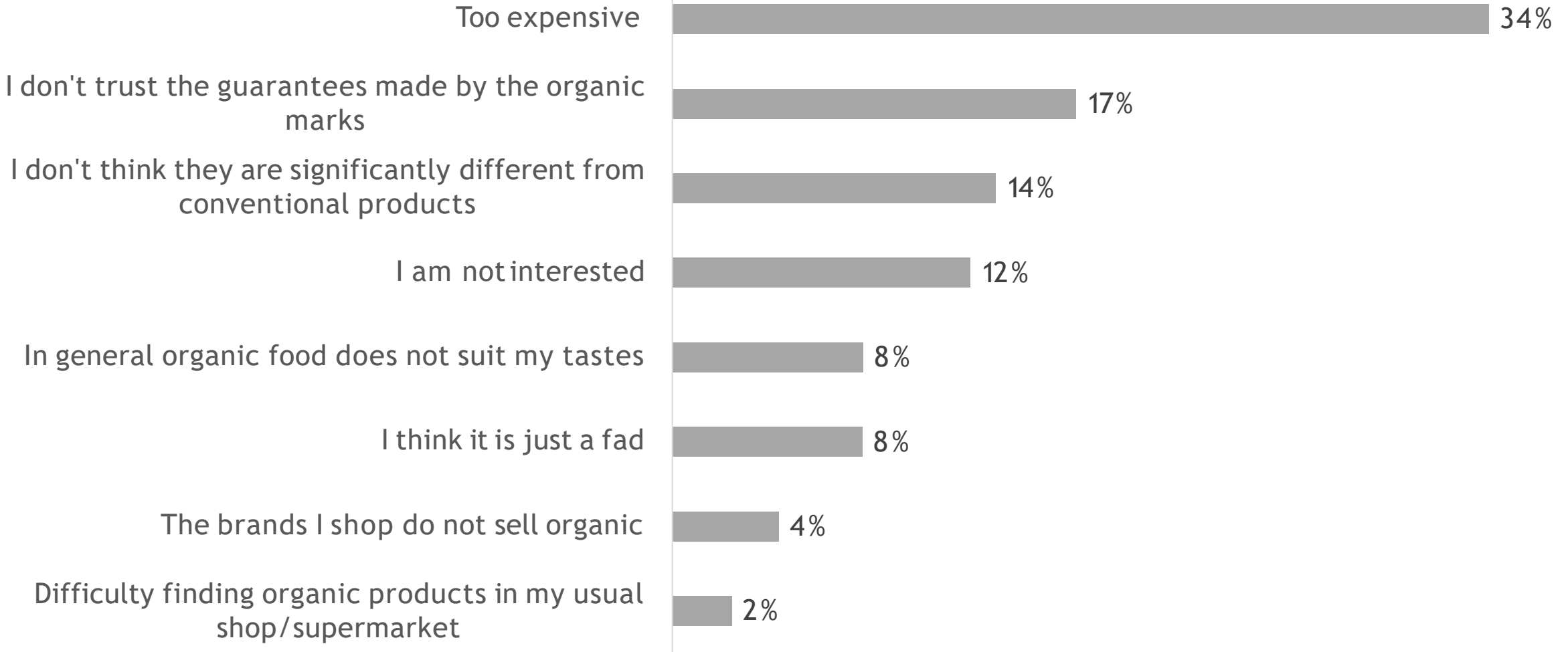
How to improve the  
perception and expand  
the consumer base



# NON USERS: REASONS

What is the reason you have never purchased certified organic food products?

(First answer in order of importance)

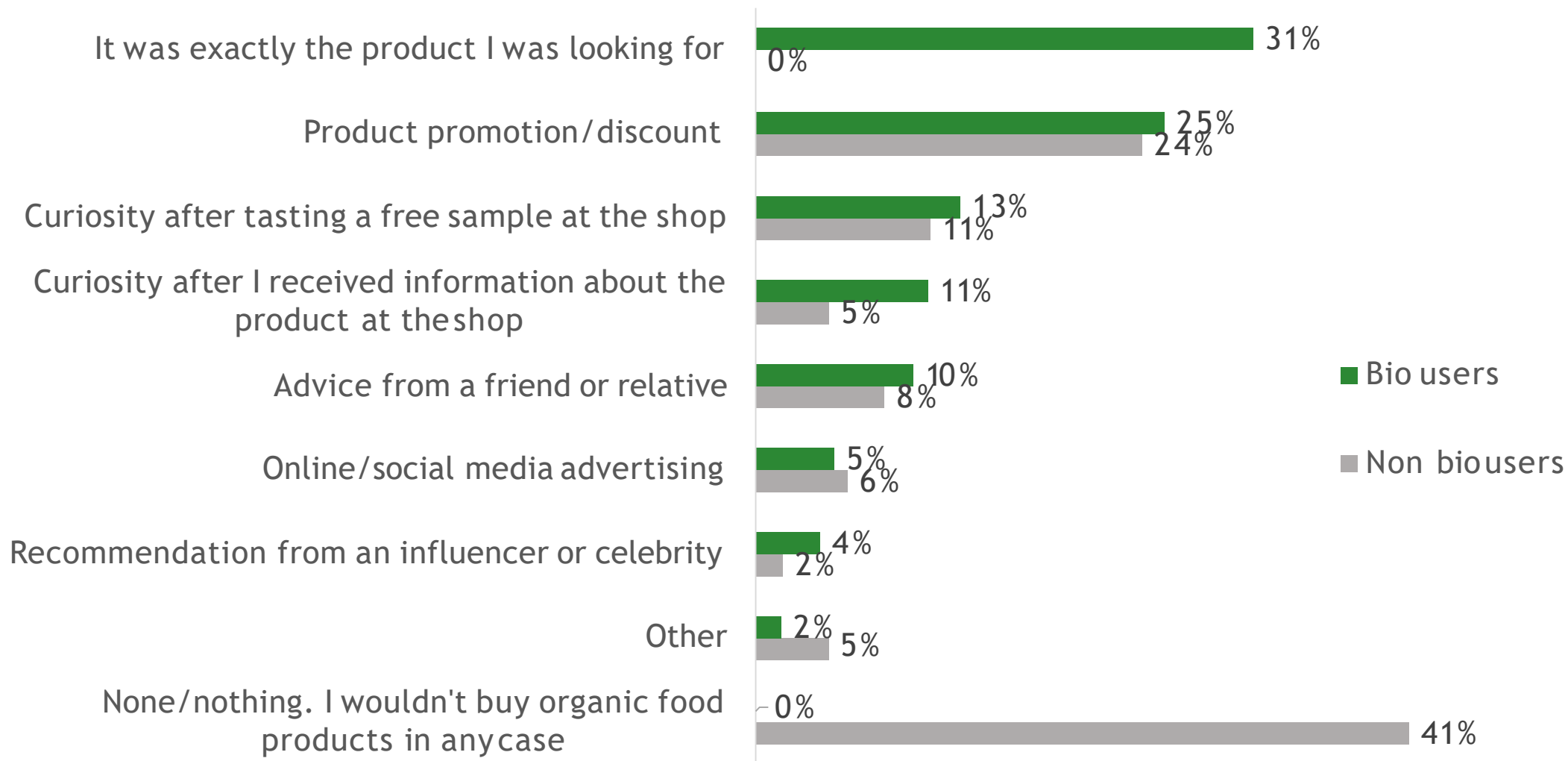


% run on NONBIO USERS



# NON USERS: INCENTIVES TO BUY

Imagine you are walking through the aisles of your local grocery store. For what reason would you decide to/What would convince you pick out a certified organic product?  
 (First answer in order of importance)

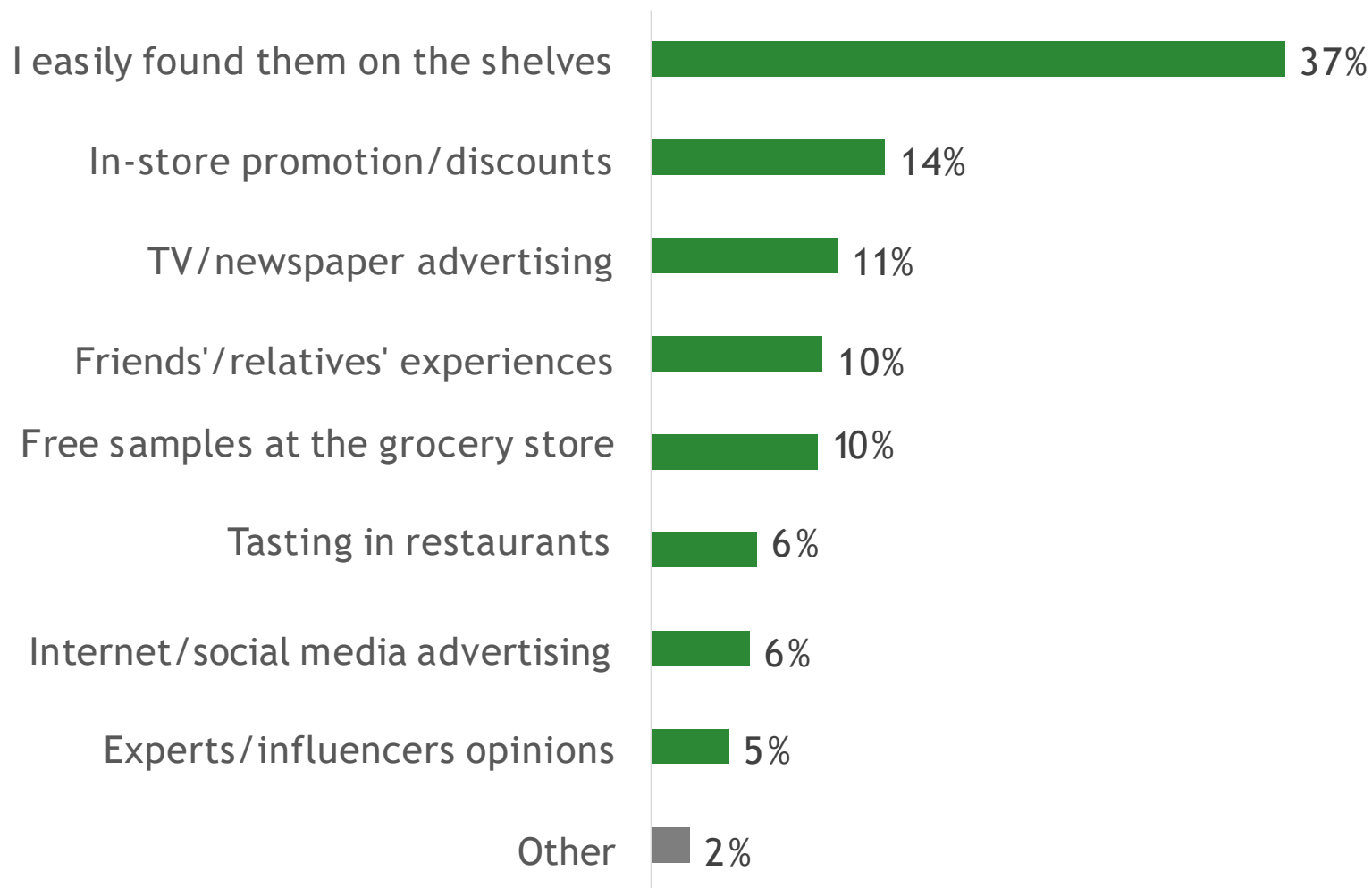




# USERS: INCENTIVES TO TRY A NEW ORGANIC PRODUCT

Now think about your recent experiences. How did you find out new certified organic products?

(First answer in order of importance)



% run on total sample













# TRADE SURVEY

# 3



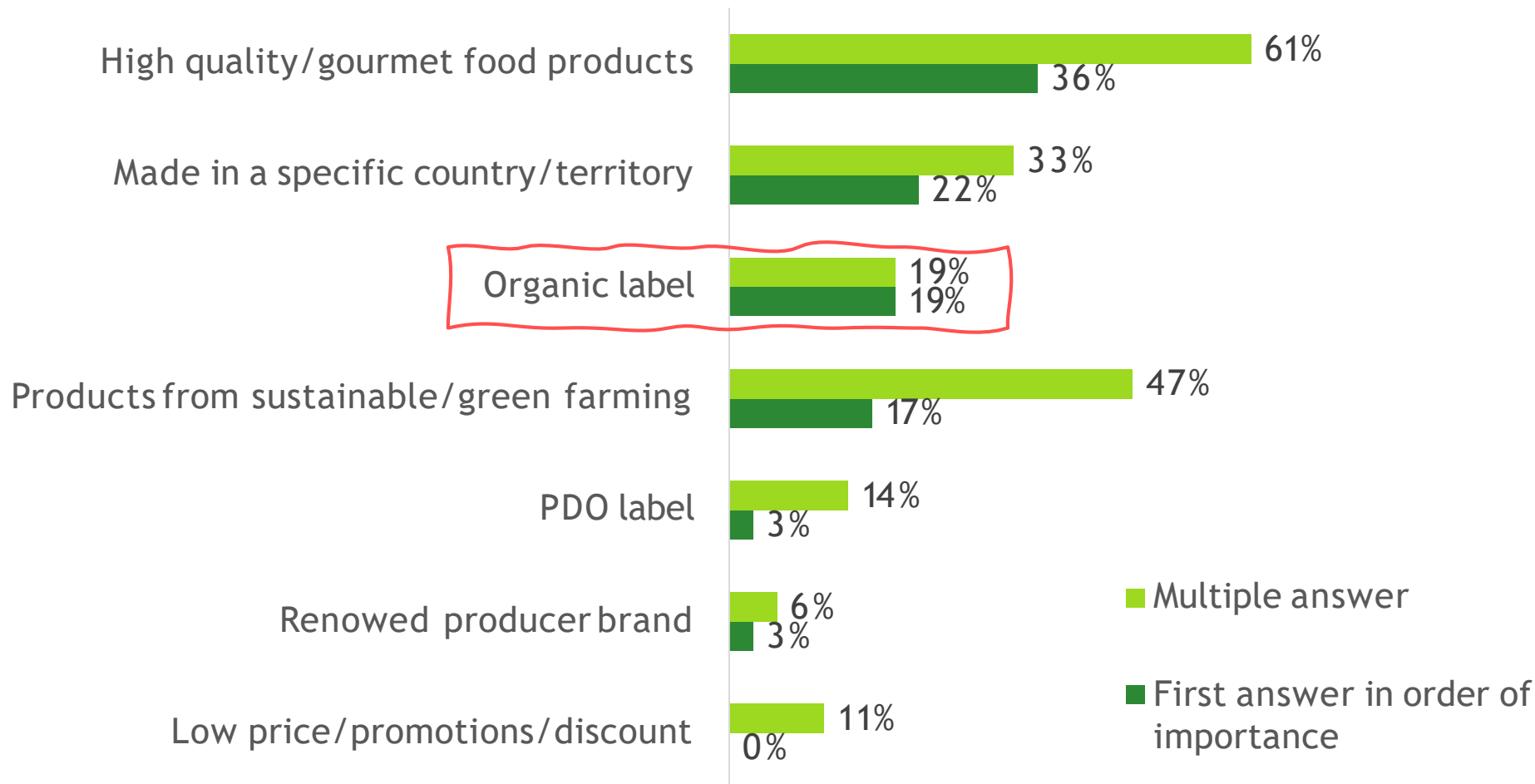
## HIGHLIGHTS

-  German restaurants and retailers include in their menu/assortment mainly high quality food/gourmet products (36%), and food produced in specific territories (22%). The organic logo represents the first-choice criteria for 19% of operators.
-  Around 69% of operators have European organic products in their assortment, whereas the Bio-Siegel certification is the secondo most common certification (67%).
-  Organic food products offered to customers are from Germany (100%), from Italy (33%), from France (26%) and from Spain (4%).
-  The largest part of the retailers (59%) consider that European organic certification and National organic certifications offer the same guarantees to consumers, whilst 15% of operators regards the European certification as the best.
-  42% of operators are aware of the production regulation of the European organic certification.
-  Traders indicate that Italy and Germany are the countries with the best organic products.
-  Restaurateurs and retailers declared that EVO oil, Fruit and Vegetables (29%) and wine (23%) are the most distinctive products from Italy.
-  27% of retailers and restaurants claim that their knowledge of European organic products has increased significantly over the last 3 years, whilst 50% says that it has increased slightly.
-  76% of traders have increased the sales of European organic products over the last 3 years.
-  Traders consider tastings/presentations held by suppliers/distributors (43%) or meetings with producers at specialized trade shows (13%) or social media/internet (13%) as the three most suitable ways to improve their knowledge of the European organic food.



# ROLE OF THE ORGANIC LABEL FOR FOOD BUSINESS OPERATORS

In your business, when selecting the food items, which factors mainly affect your purchase decision?



% run on total sample

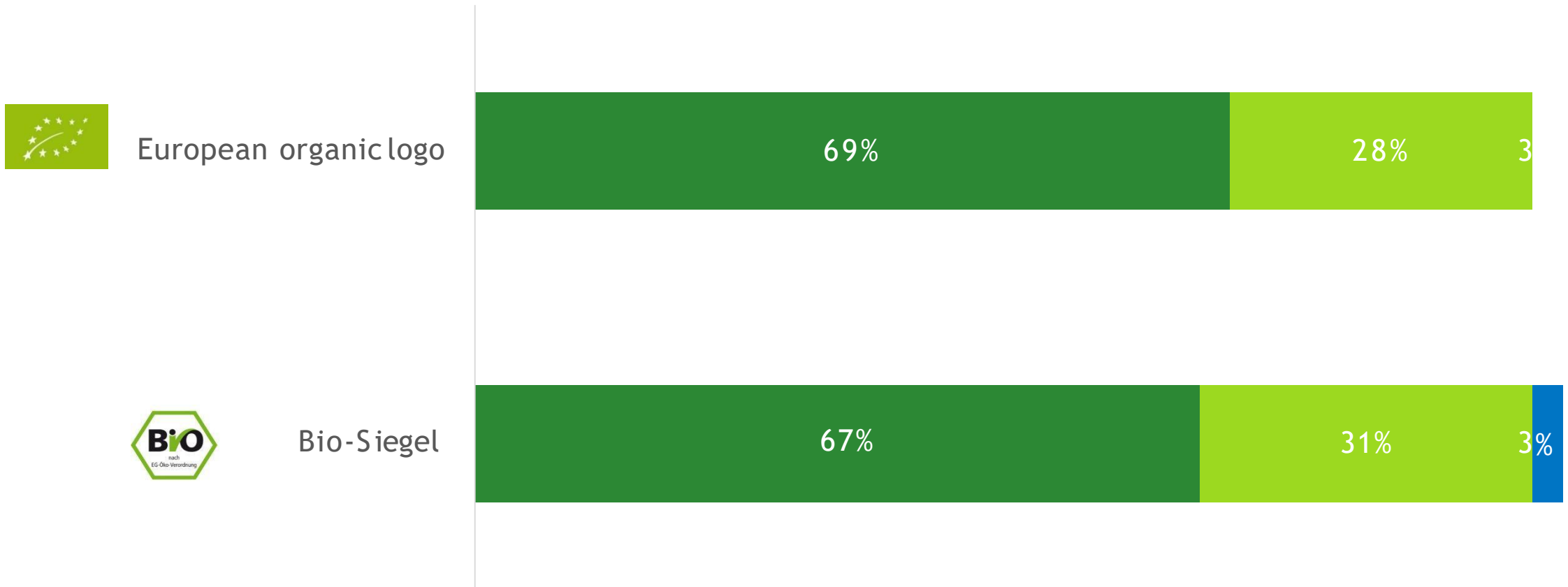




# AWARENESS/PENETRATION RATE OF ORGANIC LOGOS

Which of the following ORGANIC LOGO do you know/is part of your selection?

■ It's part of my selection    
 ■ I know this logo, but It's NOT part of my selection    
 ■ I don't know this logo



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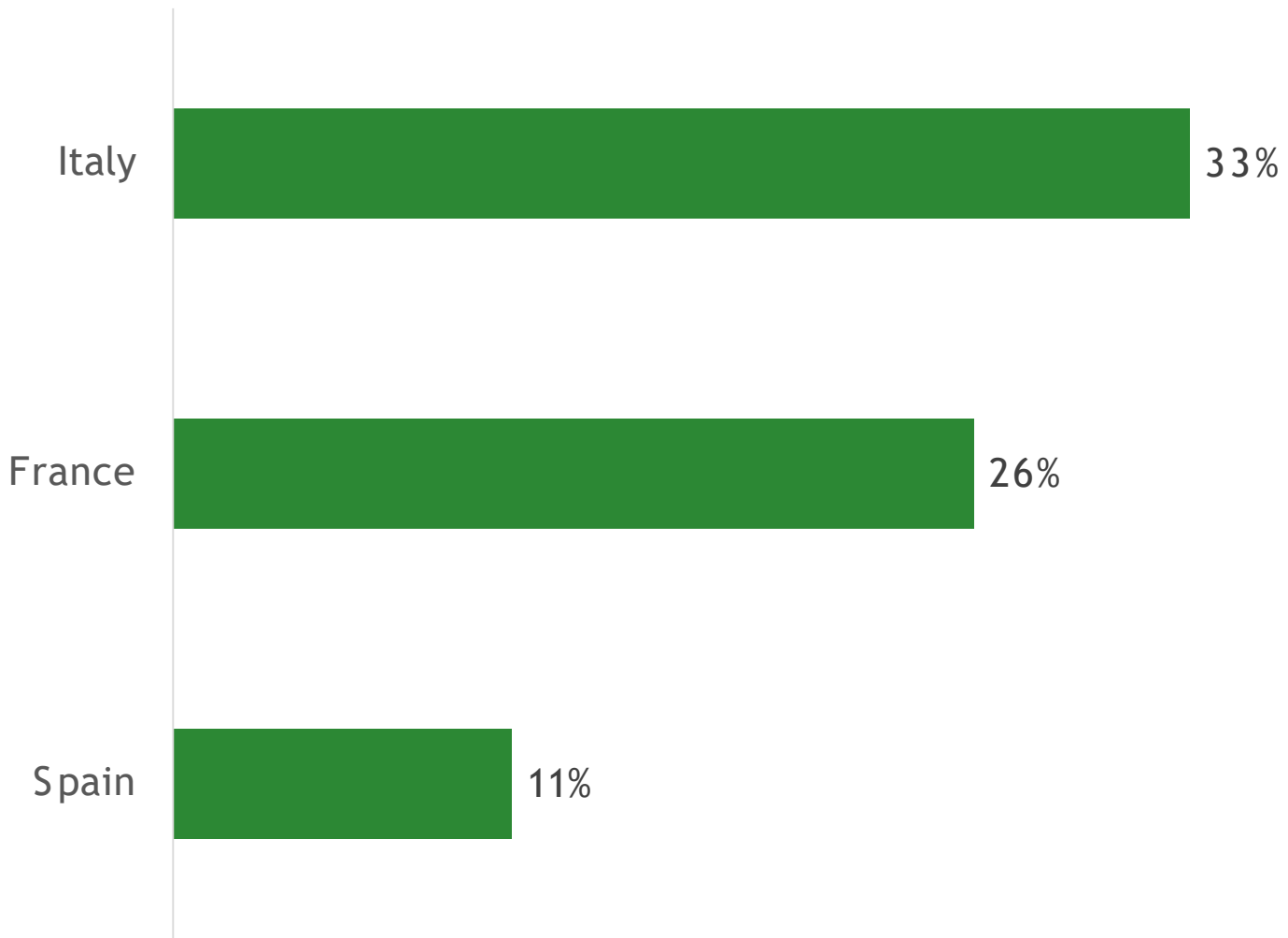


# ORGANIC: PENETRATION RATE BY COUNTRY

Where do the certified organic food products you sell come from?

(Multiple answers)

Germany  
100%



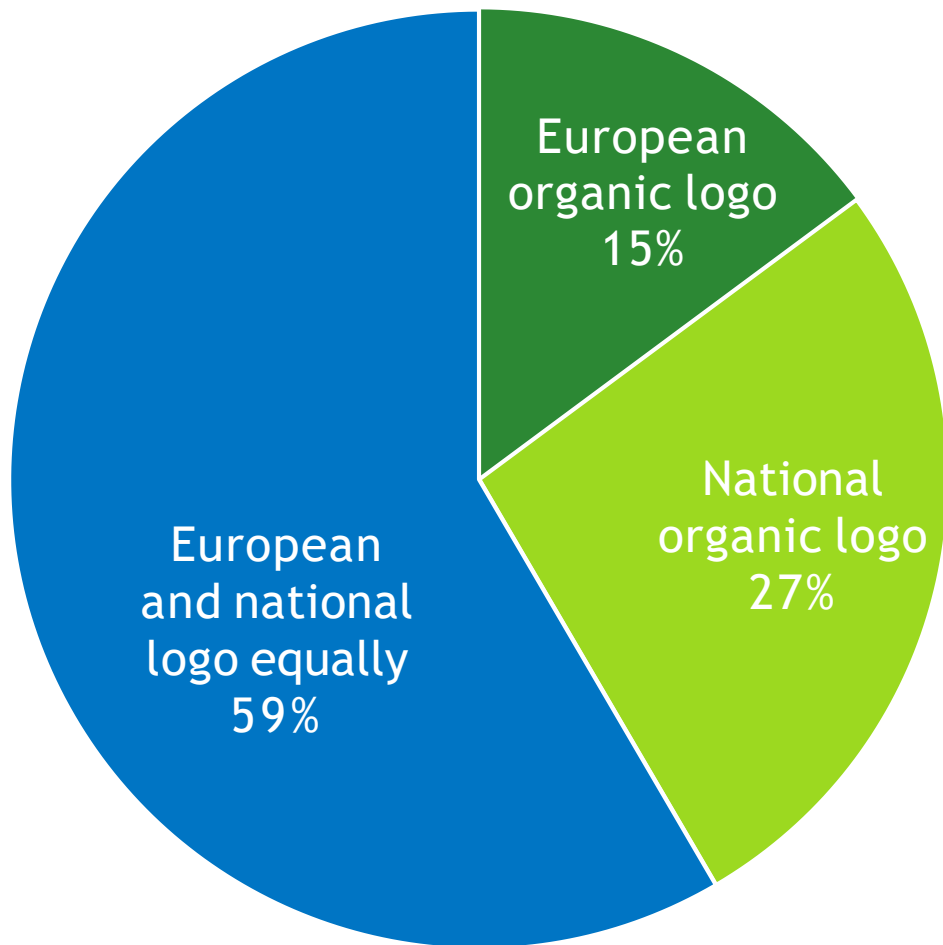
The answer «Germany» was excluded from the graph

% run on  
BIOUSERS



# EUROPEAN VS NATIONAL ORGANIC LOGO

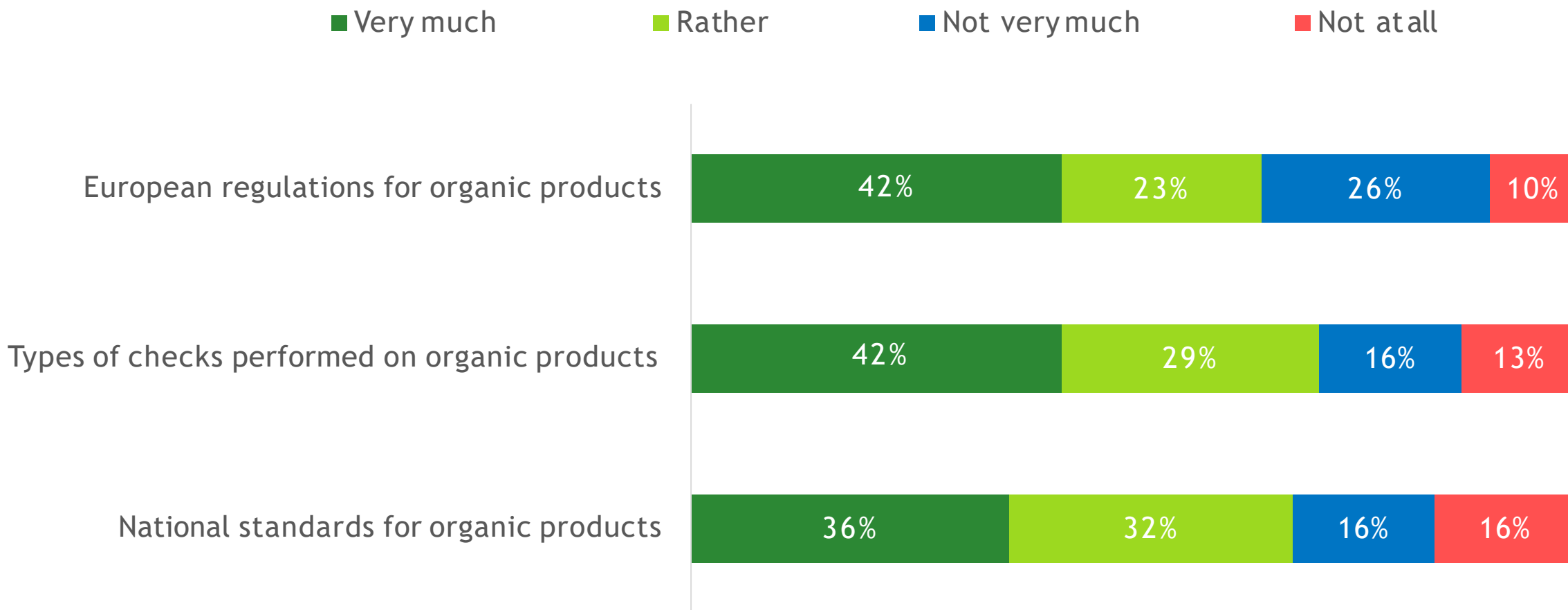
In your opinion, which of the following organic certifications offer the best guarantees to consumers?





# KNOWLEDGE OF SPECIFIC ASPECTS

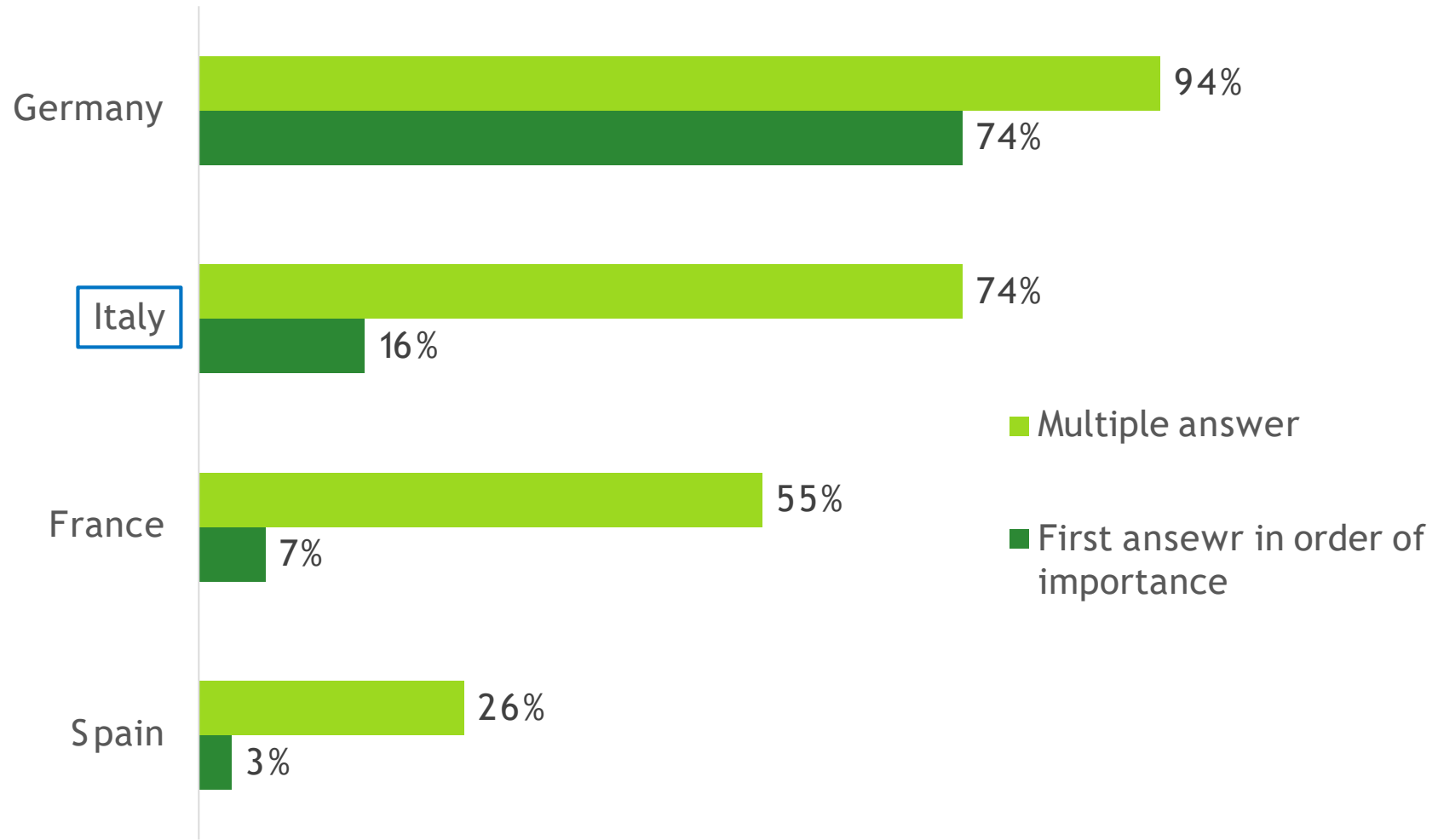
Listed below are some aspects related to certified organic products. For each one indicate to what extent you are aware of it





# ORIGIN OF ORGANIC : ROLE OF ITALY/NETHERLANDS

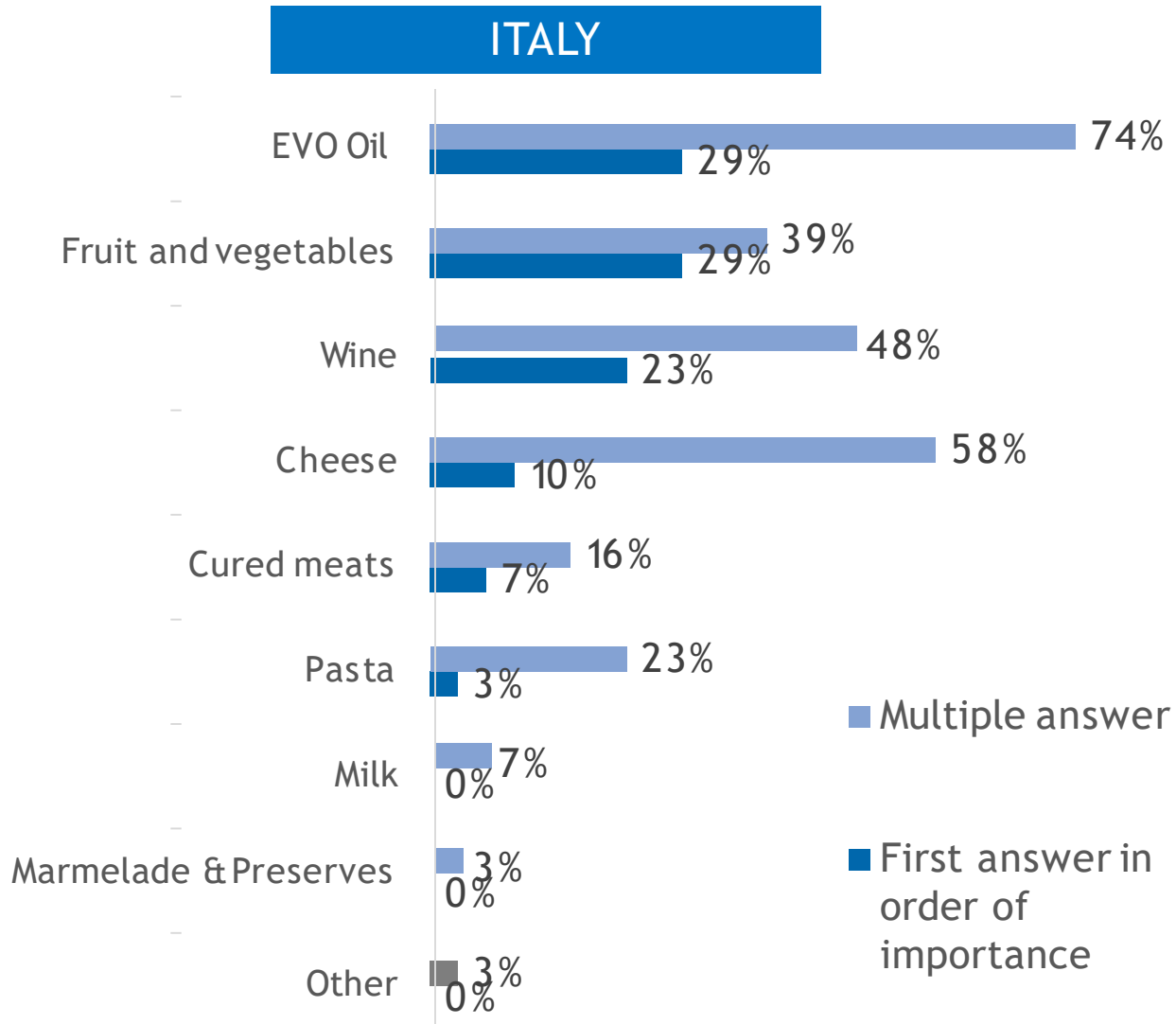
Regardless of what you actually sell, which of the following countries produce the highest quality organic products?





# ORGANIC MADE IN ITALY/NETHERLANDS: TOP PRODUCTS

In particular, according to you, what are the most distinctive organic products produced in ...?

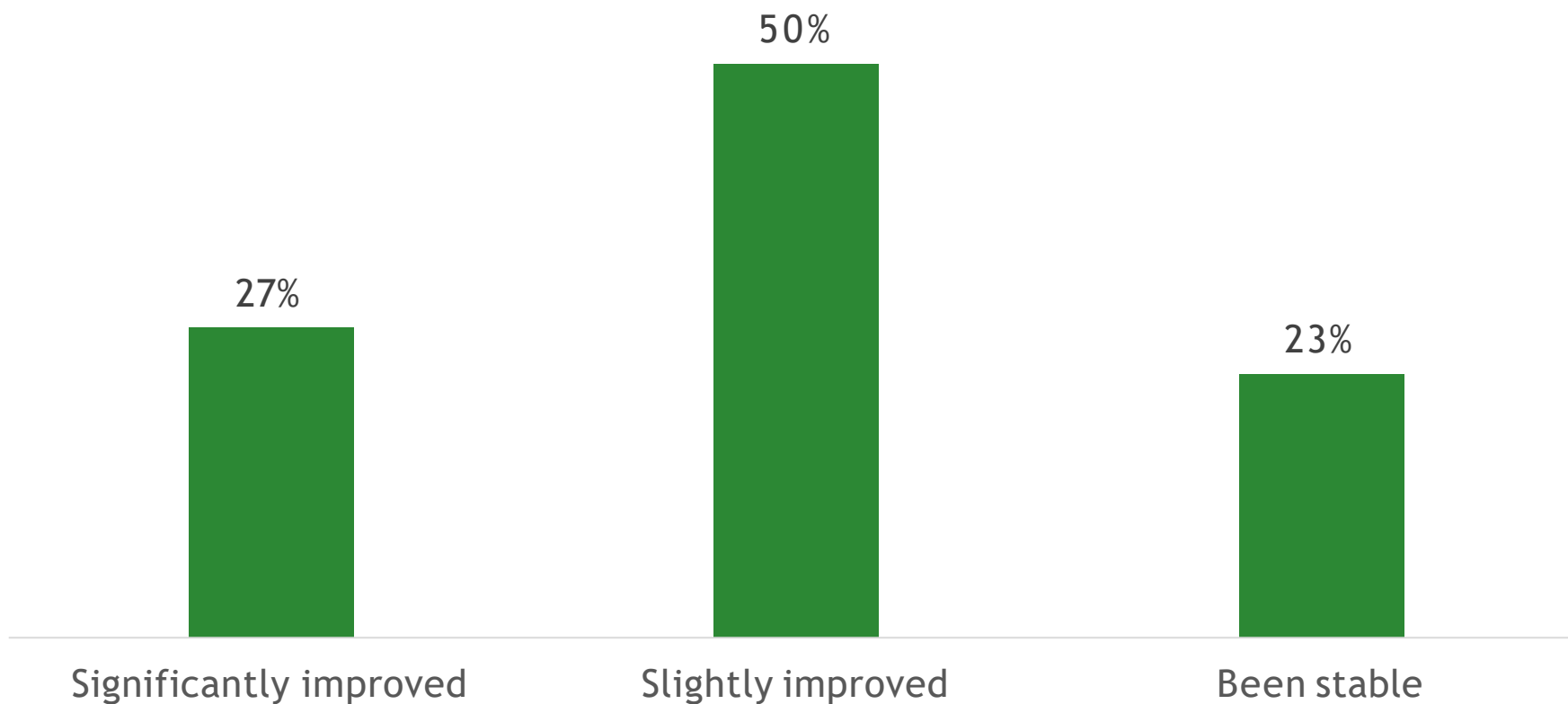


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# AWARENESS: TREND OVER THE LAST YEARS

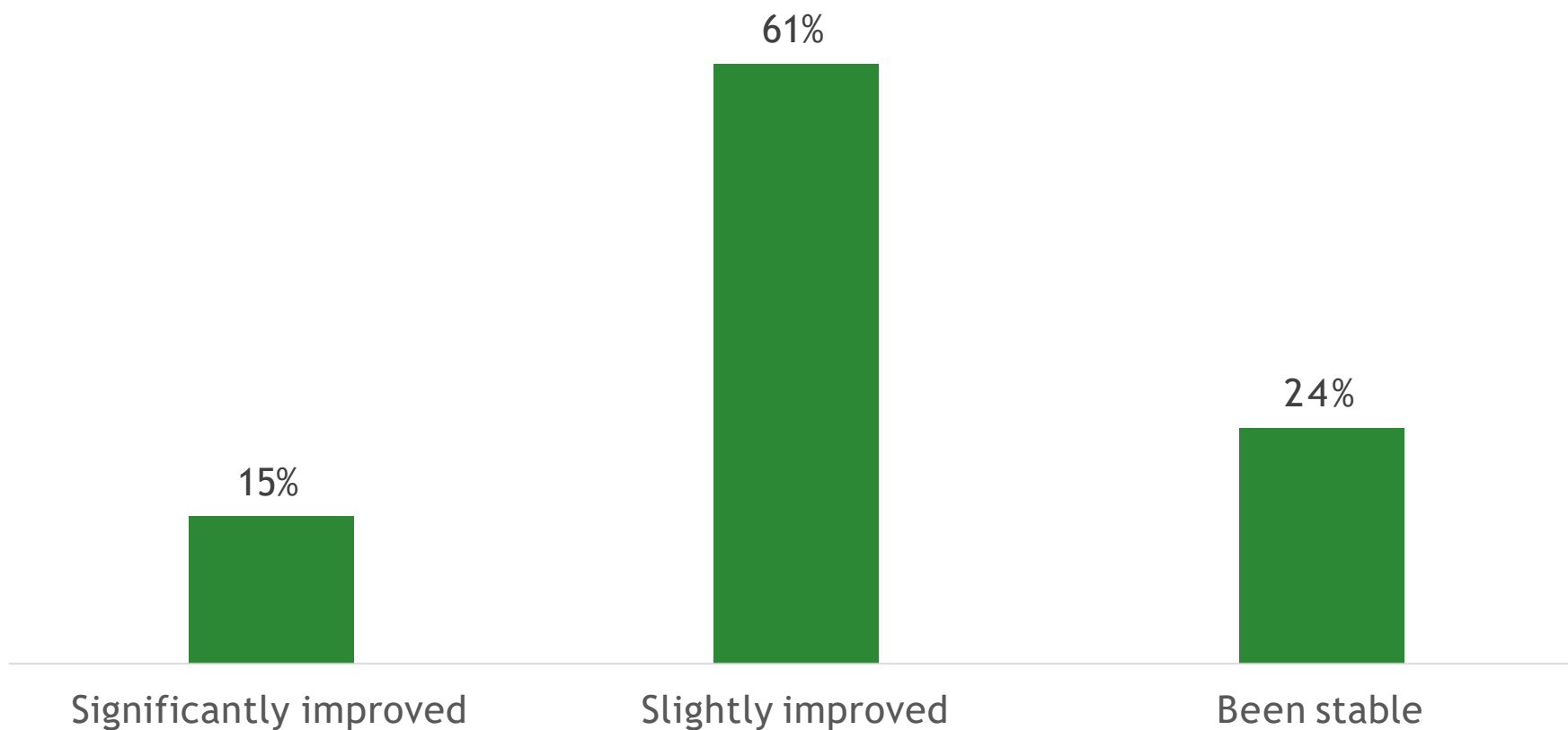
Over the last 3 years, your AWARENESS of European organic products has...





# SALES LEVEL: TREND OVER THE LAST YEARS

Over the last 3 years, the SALES of European organic products in your selection has...



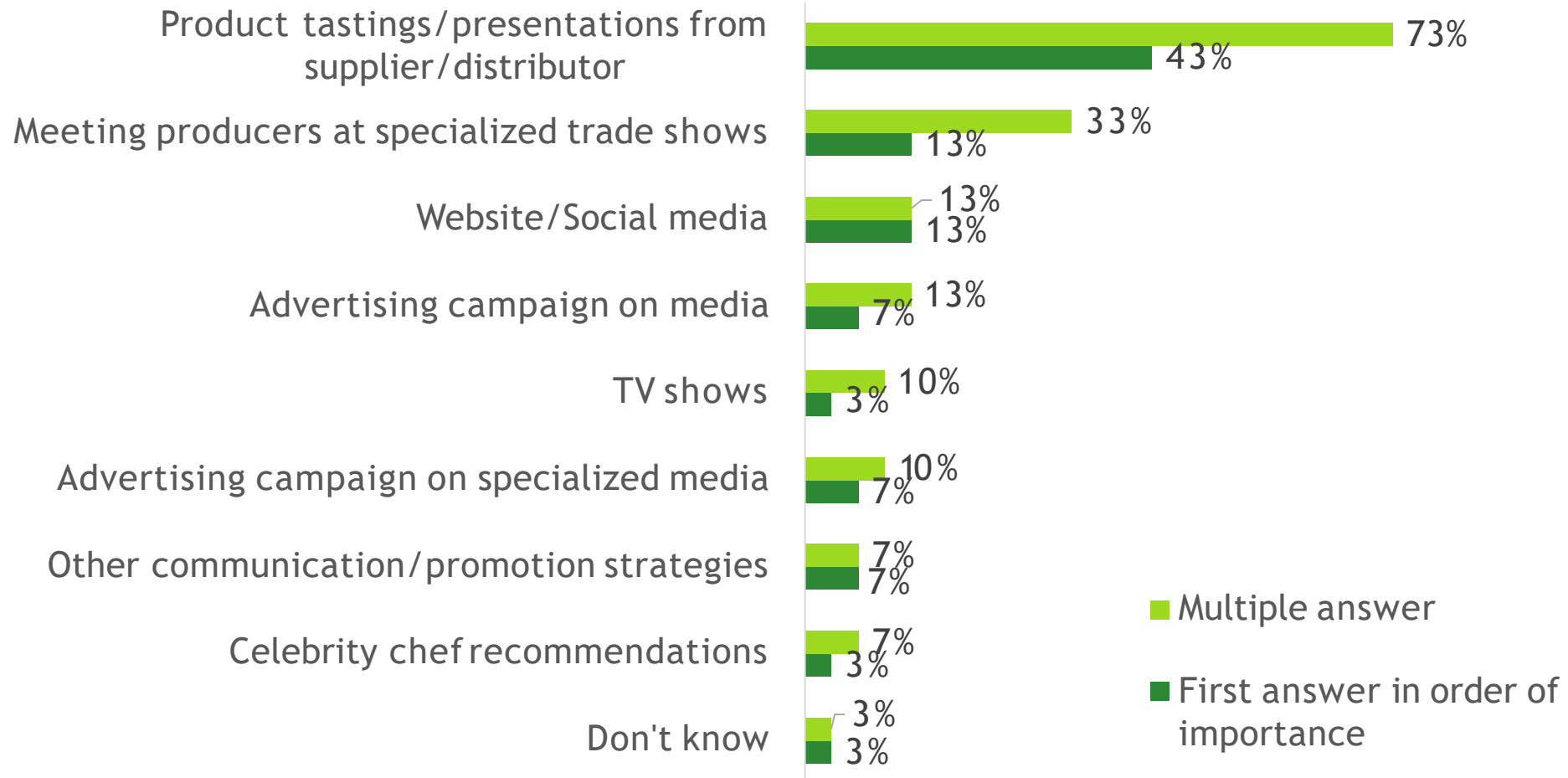
*% run on total sample*





# FAVOURITE CHANNELS TO INCREASE THE AWARENESS OF THE EUROPEAN ORGANIC PRODUCTS

How would you like to increase your knowledge about EUROPEAN ORGANIC PRODUCTS?



■ Multiple answer  
 ■ First answer in order of importance



# IN-DEPTH INTERVIEWS

# 4



## ROLE OF ORGANIC FOOD TODAY

What is the role of organic food today in your country?

### HEALTH

- Give the consumer healthier choices
- Less residues and chemical substances
- Better for environment and animal welfare

### OPPORTUNITIES

- People increasingly aware of environmental challenge
- New trend in food market
- Natural Food stores and direct sale by farmers is uneven developed

## ORGANIC LOGO: EUROPEAN vs NATIONAL

What is your opinion about the European and national organic logo?

It is **confusing** to have both, they **represent the same**. For the national logo there were huge communication campaigns in Germany, whereas for the **European logo no communication** is provided. So many consumers do not know it.

Both logos are **well known** and well-used, certification and control are **important** measures to ensure organic quality

In our Country Demeter/Bioland etc are **widespread**

Same



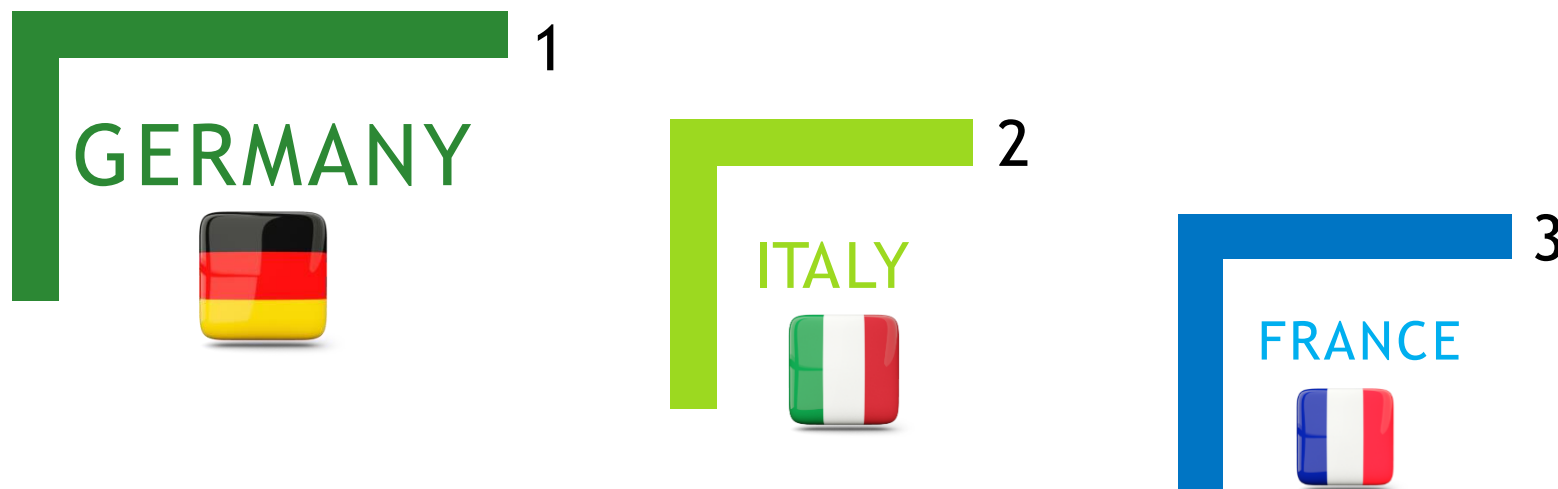
## TOP 3 STRENGTHS/ADDED VALUES TO THE «ORGANIC»

In your opinion, which of the following attributes, if any, represent strengths/added value to the organic certification for German consumers?



## TOP 3 PRODUCERS COUNTRY OF THE ORGANIC PRODUCTS

In your opinion, which countries are the most successful producers of organic products?





# ITALIAN PRODUCTS

What is your opinion about Italian organic products?

## ITALIAN PRODUCTS



### MOST SUCCESSFUL PRODUCTS

- Rice
- Wine
- Pasta
- Fruit and vegetables
- Legumes
- EVO oil
- Tomatoes



### EXPECTED TRENDS

- The Italian organic sector will increasingly grow
- Many retailers offer “Italian weeks” regularly, where they promote especially Italian products
- Interested in



## ORGANIC MARKET FORECASTS

*Now let's think about the perspectives for the European organic food in your country*

In your opinion, over the next 2-3 years what trend do you expect for European organic products consumption in your country?

Expected **trend** in  
organic sales over the next  
2-3 years



*(weighted average among the stakeholders forecasts)*

Specifically, today in your country the share of organic food on the total food sales is 5.3%. Could you please identify what this share will be in 2021?

Expected **share** of organic  
sales in total retail sales over  
the next 2-3 years



*(weighted average among the stakeholders forecasts)*



# TOP 3 CHANNELS FOR ORGANIC FOOD'S PROMOTION

In your opinion, which are the most effective actions for communicating and promoting the value of the European organic food products in your country?



# TOP 3 CHANNEL FOR ORGANIC FOOD'S SALES

In your opinion, over the next 2-3 years what will be the most successful sales channel for organic food & beverage products in your country?





# TOP 3 PRODUCT CATEGORY FOR ORGANIC FOOD

In your opinion, over the next 2-3 years what will be the most successful\* product category for organic food & beverage products?



## SPACE FOR ADDITIONAL COMMENTS

Time is running out, nature shows us the many negative effects of conventional economics

Organic farming urgently needs to be promoted

Need for increasing role of organic in meat production





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