Kingdom of the Netherlands

Market Analysis of the Organic Food Market in Germany and Consumer Strategies to Strengthen the Organic Market in Germany and Switzerland

2023

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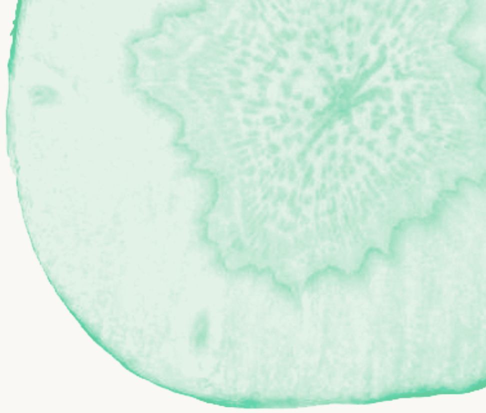

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1. Introduction to the German Organic Food Sector

1.1. Market Characteristics:

1.1.1. Current Market Situation

GERMANY'S GLOBAL STANDING: A KEY PLAYER

In the year 2021, the European Union ranked as the second-largest domestic market for organic products globally, following the United States with a turnover of € 48.6 billion. Among European countries, Germany emerged as the leading market for organic products, with a revenue of € 15.9 billion, and thus emerged as one of the most important markets for organic products worldwide.[1] In 2020, the European organic market witnessed robust growth, expanding by 15%. Notably, Germany experienced the highest growth rate of 22.3% within the European market. Furthermore, Germany accounted for the largest number of import companies, with over 1.900 enterprises involved in the organic trade.[2] As a result, Germany offers lucrative opportunities for businesses seeking to tap into the thriving organic food market and cater to the growing interest in organic products.

GERMANY'S GROWING DOMESTIC MARKET: A RESILIENT TREND

Over the years, Germany's organic market has experienced a journey of growth. The year 2020, marked by the challenges of the COVID-19 pandemic, witnessed a noteworthy surge in the organic market. Totaling € 15 billion, Germans invested 22% more in organic food and beverages compared to 2019. With people spending more time at home during the pandemic, cooking and prioritizing healthy, environmentally-friendly, and animal-friendly food choices became a prevalent trend.[3]

In the year 2021, the German food retail sector achieved a significant milestone with organic food sales generating a revenue of € 15.9 billion. This figure represents an impressive growth of 487.8% within a span of 20 years, reflecting the substantial expansion and increasing popularity of organic food in Germany.[4]

Examining the year 2022, despite the reopening of restaurants and canteens where organic options are often limited,[5] the organic market in Germany maintained its strength. The organic sales figure of € 15.3 billion surpassed the pre-pandemic year of 2019 by 25%, indicating the continued growth and resilience of the organic sector. Although there was a slight decline of 3.5% compared to 2021, the organic market managed to hold onto its sales momentum.[6] The market share of organic food in total food sales amounted to around 7% in 2022, after years of consistent, positive growth.[7]

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1 AMI, FiBL, IFOAM (2022): Umsatz mit Bio-Lebensmitteln in ausgewählten Ländern weltweit im Jahr 2021 (in Millionen Euro), cited from Statista: Bio-Markt Deutschland, p. 5.

2 Oekolandbau.de: Bio-Markt in Europa mit starkem Wachstum 2020, February 2022.

3 Bund Ökologische Lebensmittelwirtschaft: Branchenreport 2023, p. 24-27.

4 bioVista; BNN; BÖLW; GfK; Nielsen (2023): Umsatz mit Bio-Lebensmitteln in ausgewählten Ländern weltweit im Jahr 2021 (in Millionen Euro), cited from Statista: Bio-Markt Deutschland, p. 7.

5 Bundesministerium für Ernährung und Landwirtschaft: Mehr Bio in Restaurants, Kantinen und Mensen – so unterstützt das BMEL gute Außer-Haus-Verpflegung, August 2023.

6 Bund Ökologische Lebensmittelwirtschaft: Branchenreport 2023, p. 24-27. Please note that the revenue figures encompass the financial turnover derived from various retail channels, including food retail, natural food retail, and other miscellaneous outlets such as drugstores, health food stores, farm shops, and artisanal establishments like bakeries. Notably, this analysis does not encompass revenues from out-of-home consumption, see also Heike Kuhnert's dossier on current trends in the German organic sector, Thünen Institut 13.03.2023.

7 BÖLW (2023): Anteil von Bio-Lebensmitteln am Lebensmittelumsatz in Deutschland in den Jahren 2011 bis 2022, cited from Statista: Bio-Markt Deutschland, p. 10.

GERMANY'S ORGANIC FARMING SECTOR

Over recent decades, Germany has witnessed substantial growth in the organic farming sector. The number of organic farms surged by 144% between 2001 and 2021, totaling around 35.716 farms in 2021, compared to 14.702 in 2001. Moreover, the organic cultivation area experienced a remarkable increase of 184% over 20 years, with approximately 1.9 million hectares dedicated to organic farming in 2022, constituting about 11.3% of total agricultural land. These figures highlight the progression of organic farming in Germany, with organic agriculture now encompassing around 12% of the total agricultural land.[8] However, though the development of organically farmed areas in Germany has been positive overall over the past 20 years, Germany is still miles away from the political target of 30% that it has set itself.[9]

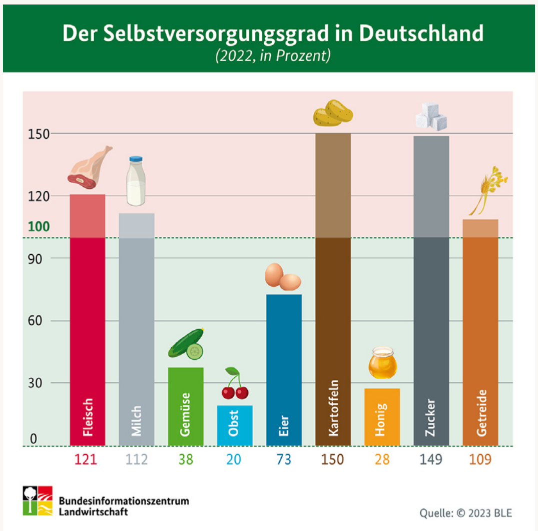
REGIONAL VARIATIONS IN ORGANIC FARMING AND CONSUMPTION

The heart of organic farming in Germany lies predominantly in the southern regions of the country. States like Bavaria and Baden-Wuerttemberg stand out as major hubs for organic cultivation. Additionally, organic farming has gained significant ground in the states of Brandenburg and Mecklenburg-Western Pomerania. These regions have witnessed a substantial concentration of organic agricultural activities, contributing significantly to the overall organic farming landscape in Germany.[10]

Regarding regional consumption differences, the following observations can be highlighted: The highest organic consumption, in terms of quantity, occurs in the states of North Rhine-Westphalia, Bavaria, Baden-Wuerttemberg, Lower Saxony, and Berlin. Importantly, all of these states are distinguished by their position among the top GDP contributors in Germany. The states of Thuringia, Saarland, and Bremen exhibit the least demand for organic products.[11]

GERMANY'S TRENDS IN ORGANIC FOOD IMPORTS

Despite the expanding availability of domestically produced organic goods - between 2010 and 2022, organic vegetable production in Germany witnessed a remarkable growth of 163%, with a total harvest of 41 million tonnes in 2022 -, Germany continues to rely on imports to meet market demand.[12]



Germany's average degree of self-sufficiency of selected products, regarding conventional and organic food: Meat, milk, vegetables, fruit, eggs, potatoes, honey, sugar, cereals. © Bundesministerium für Ernährung und Landwirtschaft.

[8] AMI; BMEL (2022): Anteil der ökologischen Landwirtschaft an den Verkaufserlösen der Landwirtschaft in Deutschland in den Jahren 2011 bis 202, cited from Statista: Bio-Markt Deutschland, p. 13, BMEL; BÖLW: (2022): Anzahl der Betriebe im ökologischen Landbau in Deutschland in den Jahren 1995 bis 2021, cited from Statista: Bio-Markt Deutschland, p. 14, BÖLW; Statistisches Bundesamt (2023): Anbaufläche im ökologischen Landbau in Deutschland in den Jahren 1995 bis 2022 (in Hektar), cited from Statista: Bio-Markt Deutschland, p. 15, Oekolandbau.de: Zahlen zum Öko-Landbau in Deutschland, July 2023.

[9] Bundesministerium für Ernährung und Landwirtschaft: Ökologischer Landbau.

[10] Kuhnert, Heike: Ökolandbau in Zahlen, July 2023.

[11] IfD Allensbach: Käufer in Bio-Läden nach Bundesland im Vergleich mit der Bevölkerung im Jahr 2022, cited from Statista: Statista: Bio-Käufer in Deutschland, p. 13.

[12] Umweltbundesamt: Ökologischer Landbau, August 2023.

Import rates vary annually. For instance, the import share for various plant-based organic products exhibited fluctuations over the years. Soybeans, for example, saw an import share of 84% in 2020/21, which decreased to 81% in 2021/22. Similarly, carrot imports decreased from 40% in 2020/21 to 35% in 2021/22. Peas experienced a notable decline, dropping from 38% in 20/21 to 24% in 2021/22, and corn imports declined from 18% to 14% during the same period. Organic grain imports also saw a reduction due to improved domestic supply and rising logistics costs, going from 12% in 2020/21 to 10% in 2021/22.

Conversely, organic apple imports increased from 27% in 2020/21 to 34% in the 2021/22 season. These fluctuations are influenced by factors such as weather conditions and domestic production fluctuations. Experts anticipate a decreased role for imports, with a focus on bridging supply gaps when domestic goods are unavailable. The import percentages for pig meat saw an increase from 32% in 2020/21 to 33% in 2021/22. Similarly, beef imports rose from 11% in 2020/21 to 16% in 2021/22. Potato imports also displayed growth, climbing from 21% in 2020/21 to 26% in 2021/22.

However, experts predict a reduced reliance on imports, prioritizing their role in addressing supply shortages when local products are insufficient.[13]

1.1.2. Main Sales Channels, Retailers and Players

SHAPING THE FUTURE OF ORGANIC FOOD RETAIL IN GERMANY: ONLINE BOOM AND PANDEMIC IMPACT

In recent years, the organic food market in Germany has seen a notable shift in dynamics, with the food retail sector emerging as the driving force behind its growth, surpassing the natural food specialty stores. The sector achieved a 3.2% revenue increase in 2022, reaching € 10.2 billion, capturing two-thirds of the organic market. This growth is expected to continue, propelled by collaborations between major retailers like LIDL and Bioland, as well as Demeter and Kaufland.[14]

However, the supposed competition between discounters and organic specialty food shops is also seen as an opportunity, as Naturland's managing director Steffen Reese notes in an interview with the German news service "Tagesschau": "We have different target groups in the discount and natural food trade, and I believe that if we succeed in tapping more organic customers via the discount, they will also go to the organic shops in search of more products."[15]

Simultaneously, the online sector has experienced a significant boom, including the online trade of organic food. Even prior to the pandemic, online platforms for organic products, subscription boxes, and on-demand delivery services had gained traction. COVID-19 accelerated this trend, impacting the online retail sector positively.[16] Tegut and Rewe have a certain relevance in this area. Both trading companies offer a wide range of food products that can be ordered online. In addition, both players are strongly represented in the organic sector. However, this online growth has been especially fueled by quick-commerce providers like Gorillas, Flink, and Knuspr, expanding their delivery areas during the pandemic.[17] These providers prioritize sustainability, catering to consumers seeking organic options. Gorillas' data indicates that 56% of their orders include organic products. Alnatura's new collaboration with Gorillas strengthens this trend, listing hundreds of products in the Gorillas app. This partnership aims to enhance the Quick-Commerce experience with a focus on sustainability. Johannes Mühling from Alnatura highlights the importance of reaching especially young consumers through collaborations like this, advancing organic farming.[18] Regarding the broader online food market, it currently represents 3.2% of the total food market, with over 90% attributed to delivery and less than 10% to Click and Collect. Standalone online retailers like Picnic, Gorillas, Flink, and Knuspr share the market roughly equally with

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[13] Oekolandbau.de: Importe schließen Lücke bei der Versorgung mit Bio-Produkten, July 2023.
[14] Gider, Denise et al.: Produktions- und Marktpotenzialerhebung und -analyse für die Erzeugung, Verarbeitung und Vermarktung ökologischer Agrarerzeugnisse und Lebensmittel aus Baden-Württemberg. Ministerium für Ländlichen Raum und Verbraucherschutz Baden-Württemberg, 2023, p. 22, Bund Ökologische Lebensmittelwirtschaft: Branchenreport 2023, p. 24-25.
[15] Tagesschau: Discounter erobern Geschäft mit Bio-Lebensmitteln, June 2023.
[16] Oekolandbau.de: Bio wächst stark im Onlinehandel, May 2021.
[17] Oekolandbau.de: Deutscher Bio-Markt schrumpft erstmals, March 2023.
[18] Gorillas: Gorillas listet Alnatura-Produkte deutschlandweit, June 2022.

omnichannel retailers like Rewe.[19] However, experts predict a rise to 10-15% by 2030.[20] The growth of online retail benefits the organic sector, although specific data on the organic share remains unavailable. Nonetheless, this expansion opens doors for organic businesses.

FOOD SERVICE AND OUT-OF-HOME UNDER THE NUTRITION STRATEGY

The German Nutrition Strategy aims to transform the food system into a more plant-based and sustainable approach to achieve climate, biodiversity, and sustainability goals. One key area of focus is communal catering, where efforts are made to increase the usage of organic and plant-based, seasonal, and locally produced foods to set an example for sustainable eating habits.

The Federal Ministry of Food and Agriculture is taking various measures to promote the use of organic products in the out-of-home catering sector and to increase the organic share of 30% and more in public out-of-home catering. Among these initiatives are a model region competition and support projects for mass catering. Additionally, a new voluntary labeling system with bronze, silver, and gold levels has been introduced to encourage businesses in restaurants, canteens, and cafeterias to showcase their use of organic ingredients to customers easily. This creates a clear legal framework, enabling companies to label organic products in their kitchens with little effort, positively impacting the daily meals of 17 million people who dine in communal catering facilities.

The newly established Bio-Außer-Haus-Verpflegung-Verordnung ("organic in out-of-home catering ordinance") simplifies and enhances previous practices, making it more business-friendly, while also providing reliable information to consumers about the use of organic products in communal catering facilities. Moreover, out-of-home entrepreneurs can now indicate the monetary percentage of organic content in three categories, further streamlining the adoption and communication of organic choices. The information campaigns for out-of-home catering "Bio kann jeder" and "Biobitte" are targeted at decision-makers by the Federal Organic Farming Programme.[21]

Dr. Jürn Sanders, Co-Chair of the Executive Board and Head of the Department of Agricultural and Food Systems at FiBL, remains uncertain about the precise leverage effect of the AHV strategy. However, in the interview, he highlights the increased visibility and positive discussions surrounding the numerous benefits of organic farming as the real opportunity for organic. The public discourse not only offers positive momentum but also demonstrates that organic has become a well-established topic among relevant stakeholders in recent years.

LEADING PLAYERS AND MARKET COMPETITION IN GERMANY'S ORGANIC RETAIL INDUSTRY

For years, it has been a neck-and-neck race as to who is ahead among German retailers in terms of the organic food segment and turnover as well as the number of branches of specialized retail chains.

According to the number of branches among organic supermarkets, denn's Bio (Dennree) is ahead with 227 branches in Germany in 2020, followed by 136 branches of Super Natur Markt (Alnatura) and 60 shops of Bio Company.[22] Based on their net sales figures, Super Natur Markt (Alnatura) achieved net sales of around € 634 million in 2021. This made it the leading organic supermarket in Germany. denn's Biomarkt (Dennree) followed with € 476 million, and BIO Company achieved € 240 million.[23]

In the food retailing industry segment, the supermarket chain Edeka Südwest and the discount market leader Aldi Süd in particular are engaged in productive races for market leadership in their sales territories. In terms of turnover,

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[19] Loderhose, Birgitt: 12 Prozent Marktanteil bei E-Food bis 2030 erwartet, cited from Lebensmittelzeitung.net, June 2022.

[20] Handelsimmobilien-heute.de: E-Food auch nach Corona ein anhaltender Trend, January 2023.

[21] Bundesministerium für Ernährung und Landwirtschaft: Neues Bio-Label für Kantinen und Co. auf den Weg gebracht, April 2023, Bundesministerium für Ernährung und Landwirtschaft: Eckpunktepapier: Weg zur Ernährungsstrategie der Bundesregierung, December 2022.

[22] Company Details (2020): Anzahl der Filialen der führenden Bio-Supermarktketten in Deutschland im Jahr 2020, cited from Statista: Bio-Supermärkte in Deutschland, p. 12.

[23] EHI Retail Institute (2022): Nettoumsatz der führenden Bio-Supermärkte in Deutschland im Jahr 2021, cited from Statista: Bio-Supermärkte in Deutschland, p. 16.

Edeka has pushed discount market leader Aldi off of the top of the list in 2021. According to the Lebensmittelzeitung, organic pioneer Edeka Südwest already achieved 10% of wholesale sales with organic goods in the same year, i.e. more than € 500 million - figures rising.[24] However, Aldi Süd is following suit with its own organic brand “Nur nur Natur”, a cooperation with the organic farmers’ association Naturland, which was introduced this year. The goal is to convert a quarter of the organic product range by the end of 2024[25]. The supermarket chain Lidl of the Schwarz Group is likewise following suit with big announcements; by 2025, every tenth item in the Lidl range is to be organic.[26]

In terms of sales, the most significant drugstore chains are dm, Rossmann, and Müller. According to the Lebensmittel Zeitung, it appears that dm generated more than € 400 million in revenue solely from its own organic private label brand in 2022.[27]

Regarding private labels and manufacturer brands, organic private labels saw a robust sales increase of around 12%, whereas sales for organic manufacturer brands dropped by 6% compared to 2021, as reported by GfK. In 2022, the top-performing organic in-house brand was GUT ORGANIC (ALDI), followed by FAIRGLOBE (LIDL) and EDEKA Organic (EDEKA).[28]

1.1.3. Current Developments Regarding Price, Quality and Product Categories

PRICE AND QUALITY LEVELS: ORGANIC FOOD MARKET GROWTH THROUGH DISCOUNTERS VS. SPECIALTY STORES

The organic food market in Germany is experiencing significant growth through discounters like Aldi and Lidl, making them a critical player in widening organic food accessibility and accounting for a significant portion of organic food sales. However, consumer trust in the social and environmental aspects of discounted organic products remains a concern. Despite consumer reservations about meeting strict organic criteria, discounters offer cheaper organic products. The lower prices of organic products in discounters can be attributed to several factors, such as limited product assortment, reduced services, and streamlined logistics.[29]

Feinkostläden, including Naturkostläden (specialty organic food stores), have been associated with a “Hochpreisimage” or a perception of being high-priced. Especially the emergence of discounted organic food options from major supermarket chains has intensified the competition and contributed to this perception. Interestingly, price comparisons have revealed that some items in large Bio-Supermärkte (organic supermarkets) are only marginally more expensive than the discounters’ organic products, but the message of equal affordability does not always resonate with customers.[30]

Discounters benefit, just like in the case of conventional foods, from lower costs due to a limited product range, lack of personalized service, and streamlined logistics. Specialty organic stores or organic supermarkets with a wide array of products and knowledgeable staff cannot compete in terms of cost. To cover their expenses, they have to mark up their products significantly and also bear the costs from their supplying wholesalers. If the products are additionally sold as association-quality goods, prices may rise further due to stricter production and processing requirements compared to the more flexible EU organic regulation.[31]

DISCOUNTERS’ STRATEGY FOR ORGANIC TRUST: FROM COLLABORATION TO CONFIDENCE

To counteract consumer reservations about the quality of their organic food items and capitalize on the growing trend of organic food items, discounters in Germany have taken proactive steps to regain consumer trust: They have entered into collaborations with organic growers’ associations. Through these partnerships, discounters gain access to additional

[24] Stockburger, Manfred and Annette C. Müller: Ökoware wird für Edeka zum Wachstumsmotor, cited from Lebensmittelzeitung.net, August 2021.
[25] Becker, Jessica: So wirbt Aldi Süd für „Nur Nur Natur“, cited from Lebensmittelzeitung.net, June 2023.
[26] Stockburger, Manfred and Jan Mende: Edeka Südwest bringt Biomarkt in Bewegung, cited from Lebensmittelzeitung.net, October 2020.
[27] Müller, Annette C., Jan Mende and Manfred Stockburger: Preisgefechte um Bio-Marktanteile, cited from Lebensmittelzeitung.net, June 2023.
[28] Oekolandbau.de: Eigenmarken stärken – Wie kann das gelingen?, February 2023.
[29] Öko-Test: Wieso Bio-Produkte bei Aldi, Lidl & Co. so billig sind, July 2020, Universität Kassel: Öko-Vertrauen, p. 48-49.
[30] Öko-Test: Wieso Bio-Produkte bei Aldi, Lidl & Co. so billig sind, July 2020.
[31] Öko-Test: Wieso Bio-Produkte bei Aldi, Lidl & Co. so billig sind, July 2020, Universität Kassel: Öko-Vertrauen, p. 48-49.

labeling and certification that provides consumers with assurance of the authenticity and organic nature of the products, addressing their concerns and bolstering the credibility of organic offerings at discounters.

Nevertheless, consumer confusion persists as a result of the multitude of organic labels and their varying eligibility conditions. This complexity, as highlighted in recent research on consumer trust in organic food, has a direct impact on product confidence. Notably, the organic farmers associations Demeter, Naturland and Bioland have emerged as brands that elicit greater trust compared to the German Bio-Siegel or the EU organic logo, as state-sponsored seals are perceived to evoke lesser trust than those associated with farmers associations.

Adding to the intricate landscape is the potential confusion between bio-seals and trade brands, which exacerbates complexity and further undermines consumer confidence. Consequently, the partnership between discounters and organic growers' associations represents a concerted effort to combat this multifaceted challenge of consumer mistrust in organic products, particularly within the discount market segment.[32]

ORGANIC FOOD TRENDS

Over the course of the past 5 years, the popularity of various organic products has increased. The highest market share in the overall organic products market is achieved by eggs, milk and dairy products, flour, oil, as well as fruits and vegetables. Since 2021, the top ten most popular organic products have been dominated by plant-based milk, which reached a total share of 61.3% in 2022, followed by plant-based meat products at 25.6%.[33]

ORGANIC SHARE OF TOTAL SALES VOLUME

Organic Products	2018	2019	2020	2021	2022
Eggs	13%	14.3%	15%	16.7%	15.9%
Flour	1%	12.2%	14.2%	15.4%	14.5%
Consumers' Milk	8.5%	10%	11%	13%	12.5%
Cooking Oil	8%	9.2%	10%	10.3%	11.1%
Fresh Vegetables	7%	8.2%	8.6%	9.7%	9.9%
Fresh Fruit	6.5%	6.8%	7.4%	7.8%	7.2%
Yoghurt	6.2%	7.4%	8%	8.8%	8.6%
Fresh Potatoes	6%	6.9%	6.5%	6.8%	6.3%
Dairy Cream Products	4.5%	3.3%	3.8%	-	-
Butter	4%	3.7%	3.7%	-	-

Source: Own representation according to BÖLW Branchenreport 2019-2023.

Recent data on organic meat consumption has highlighted a notable surge in demand over recent years. In Germany, the market share of organic meat doubled between 2018 and 2021, and over the past decade, it tripled. Despite this growth, the trend is still at a relatively modest level, with organic sources accounting for just 3.9% of purchased meat in 2022. This represents a slight decline compared to 2021, a pattern observed across almost all organic foods due to the significant rise in food prices.[34]

1.1.4. Current Communication Trends Based on Plant-Based Products

Germany not only claims the position of the largest European market but also distinguishes itself as the fastest-growing market within the plant-based food sector when compared to other European markets: Over the span of just three years,

[32] Öko-Test: Wieso Bio-Produkte bei Aldi, Lidl & Co. so billig sind, July 2020, Universität Kassel: Öko-Vertrauen, p. 48-50.
[33] Bund Ökologische Lebensmittelwirtschaft: Branchenreport 2019-2023.
[34] Bundesanstalt für Landwirtschaft und Ernährung: Wie hat sich der Marktanteil von Biofleisch entwickelt?, August 2023.

production volumes of vegetarian and vegan products have increased by 62%, reaching 97,910 tons in 2021 compared to 60,400 tons in 2019.[35]

This remarkable surge can partly be attributed to changing consumer preferences. As consumers increasingly seek sustainable and healthier alternatives, companies that closely monitor and adapt to this growing trend can tap into the thriving plant-based market and meet the evolving needs of their target audience.

However, creative and appealing marketing, along with trust in product quality, taste as well as the promise of fulfilling contemporary lifestyle aspects hold greater significance than a brand's dedication to achieving a more environmentally friendly product. This can be observed in AMI's data on the purchasing quantities of private households in Germany in 2021: Despite the growing preference of German consumers for organic products over most product categories, plant-based substitutes present a different trend. Conventional options are outpacing organic choices, with a 3.5% increase in purchases of conventional plant-based drinks compared to their organic counterparts. Moreover, the relative amount of conventional meat substitute product purchases has surged by 22.4% compared to organic alternatives.[36]

The most well-known brands for meat substitutes (Rügenwalder Mühle, Iglo, Garden Gourmet) and dairy alternatives (Alpro, Oatly) can score primarily with good taste or targeted marketing and quality trust through customer relationships developed over the years.[37]

1.2. Consumer Characteristics

1.2.1. Economic Snapshot of the German Organic Customer

ECONOMIC SIGNIFICANCE AND HOUSEHOLD EXPENDITURE INSIGHTS

Germany, with a population of 83.2 million, stands as a significant consumer market in Europe. This population size represents around 19% of the EU-27 total, emphasizing its economic importance. Germany also holds the highest GDP in Europe, totaling € 3.570 billion, contributing to about a quarter of the EU-27 GDP. Additionally, the nation's total purchasing power reaches € 2.062 billion.[38]

In the year 2021, the average monthly private consumer expenditure per German household was € 2.623, with approximately 15.3% of this budget allocated to expenses related to food, drinks and tobacco. This translates to a monthly spending of around € 401 on these categories. Over the course of a year, the average German household would spend approximately € 4.813 on food, drinks, and tobacco.[39]

Within this expenditure, a noteworthy portion goes towards organic choices: In 2021, the average German spent approximately € 191 per year on organic food, marking a substantial increase from around € 75 in 2010 and € 180 in 2020.[40] Overall, in the year 2022, Germans purchased organic food and beverages amounting to € 15.3 billion.[41]

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[35] BRC (2022): Umsatz im Markt für vegane Lebensmittel weltweit in den Jahren 2020 und 2021 mit einer Prognose für das Jahr 2025 (in Milliarden US-Dollar), cited from Statista: Vegetarismus und Veganismus, p. 4, Germany Trade and Invest (GTAI): The Food and Beverage Industry in Germany, Issue 2022/2023, p. 8.

[36] Schaack, Diana: „30 Prozent Bio?!", Presentation at the Öko-Marketingtage, Schloss Kirchberg, October 12th of 2022.

[37] Hartman Group (2021): Statista: Barriers to purchasing sustainable food and beverages in Germany in 2021, cited from Statiste.de: https://www.statista.com/statistics/1275743/barriers-to-purchasing-sustainable-food-and-beverages-in-germany/, Mintel: The Ethical Food Consumer – Germany 2022, Hofstede Insights: Country Comparison, Germany and The Netherlands, B4P: Food Report 2022, p 11, Statista Consumer Insights (2022): Ranking der wichtigsten Marken für vegane und vegetarische Fleischersatzprodukte in Deutschland nach Markenbekanntheit im Jahr 2022, https://de.statista.com/statistik/daten/studie/1309959/umfrage/bekannteste-marken-fuer-fleischersatzprodukte-in-deutschland/, Brandwatch: Beliebteste Marken für pflanzliche Milch nach Anzahl von Online-Erwähnungen in Deutschland im Jahr 2021, cited from Statista.de, https://de.statista.com/statistik/daten/studie/642831/umfrage/beliebteste-marken-fuer-pflanzliche-milch-in-deutschland/.

[38] Germany Trade and Invest: Consumer Markets and Retail Landscape in Germany.

[39] Statistisches Bundesamt: Income, Consumption and Living Conditions.

[40] Gider, Denise et al.: Produktions- und Marktpotenzialerhebung und -analyse für die Erzeugung, Verarbeitung und Vermarktung ökologischer Agrarerzeugnisse und Lebensmittel aus Baden-Württemberg. Ministerium für Ländlichen Raum und Verbraucherschutz Baden-Württemberg, 2023, p. 22.

[41] Bund Ökologische Lebensmittelwirtschaft: Branchenreport 2023, p. 8.

CURRENT PURCHASING BEHAVIOUR INSIGHTS

A substantial segment of the German populace, around two-thirds, engages in organic product purchases.[42] In terms of consumer preferences, a recent survey found that 33% respondents frequently and 3% exclusively purchase organic food. Notably, among surveyed women, this percentage is higher at 40% compared to 32% among men. Additionally, 49% of respondents reported occasionally buying organic products. Encouragingly, the overwhelming majority (89%) expressed an intention to turn to organic foods in the future. Out of this group, 42% plan to frequently (38%) or exclusively (4%) opt for organic items, while 47% anticipate doing so occasionally. It's interesting to note that in terms of future purchasing behavior, women are slightly more inclined than men to indicate frequent or exclusive acquisition of organic products. While 15% of all respondents currently state that they never purchase organic foods, about three-quarters of this subgroup mention that they don't intend to buy organic foods in the future.[43]

In the domain of age demographics, organic food products attract consumers from various age brackets in Germany. Among Generation X (41-55), Generation Y (26-40), and Generation Z (14-25), over 41% of respondents state that they actively consider organic labels when purchasing food.[44] Nevertheless, it's worth highlighting that individuals aged 30-39 years stand out, with 6% exclusively and 36% frequently choosing organic purchases. This contrasts with older generations, where only 1-3% of individuals aged 40 and above exclusively purchase organic products, and 25-36% of them do so frequently.[45] Inquiring about the perceived importance of sustainability for everyday products, 63% of respondents emphasize its significance in their purchasing decisions. This sentiment is particularly pronounced among middle-aged and older generations, which is advantageous for retailers, given their higher income and purchasing power. Surprisingly, younger consumers, specifically those aged 18-35, are more willing to accept a premium price for eco-friendly products, with 40% expressing their willingness.[46]

Consumers primarily purchase organic products in supermarkets (91%), followed by discount stores (77%) and local farmers' markets with regional offerings (55%). About 40% of consumers consider conventional supermarkets as their main shopping destination for organic items, while 22% prefer shopping at health food stores. A smaller percentage, 15%, opt for online sources for their organic groceries, and 6% use subscription box services for their organic food supply.[47]

1.2.2. Motivators and Barriers for Organic Consumers

MOTIVATORS FOR BUYING ORGANIC

The motivations underlying organic product purchases are driven by a blend of **altruistic and egoistic factors.** Consumers are influenced by both concerns for broader societal impact and personal benefits when opting for organic products.

Environmental concerns significantly influence consumers' food choices, with 84% considering climate and the environment as important factors.[48] The proportion of consumers making deliberate purchases of natural and organic products has risen from 17.2% in 2020 to 36.2% in 2022.[49] This change in consumer behavior underscores a growing awareness of the impact of long transportation routes on greenhouse gas emissions, especially considering the vulnerabilities exposed by the global supply chain disruptions during the pandemic.[50] Ethical concerns, particularly regarding **animal welfare**, play a key role in influencing consumers to favor organic choices. This sentiment is reflected in a survey by the Federal Ministry of Food and Agriculture, with nearly

42 B4P Food Report 2022, p. 16.
43 Bundesministerium für Ernährung und Landwirtschaft: Öko-Barometer 2022, p. 6.
44 VuMA (2022): Generationen in Deutschland nach Zustimmung zu Aussagen über Ernährung und Lebensmittel im Jahr 2021, cited from Statista: Generation Z, p. 40.
45 Bundesministerium für Ernährung und Landwirtschaft (2023): Was schätzen Sie, wie häufig kaufen Sie derzeit Biolebensmittel ein?, cited from Statista: Bio-Markt Deutschland, p. 36.
46 Deloitte: Sustainability Trend Under Pressure 2022, p. 9-24.
47 Bundesministerium für Ernährung und Landwirtschaft (2023): Wo kaufen Sie Bio-Produkte?, cited from Statista: Bio-Markt Deutschland, p. 39.
48 Bundesministerium für Ernährung und Landwirtschaft: Ernährungsreport 2022, p. 22.
49 B4P Food Report 2022, p. 15.
50 Bundesanstalt für Landwirtschaft und Ernährung: Trendreport Ernährung 2023, p. 8-18.

90% of participants expressing their preference for organic products due to the better treatment of animals.[51] **Regionality** emerges as a central driver in organic product purchasing decisions, with 88% of participants in the same survey highlighting the significance of supporting regional production and businesses when choosing organic.[52] According to the Consumer Assistance Office Germany, the term „region“ lacks a legal definition and is employed variably. A regional product should ideally encapsulate the concept of being „from the region, for the region.“ In this sense, production, processing, and marketing occur within a distinct geographical zone. Individuals often perceive their region as the broader vicinity around their dwelling, encompassing areas like their district, federal state, or specific natural landscapes such as the Eifel, the Vogtland, or the Taunus.[53] This emphasis on regionality influences various factors, such as reduced transportation distances and a stronger connection to the food's origin. Notably, fresh items like eggs, vegetables, fruits, bread, meat, and dairy are particularly favored to be sourced locally, especially by women. This regional focus is more pronounced among older individuals compared to younger ones, and there is also a noticeable trend in the eastern part of the country, where an increased importance is placed on locally preserved vegetables, fruit, and fish.[54]

Driven by concerns over **personal well-being**, organic products have gained traction, especially in the wake of various health crises, including the COVID-19 pandemic. At the core of these motivations lies the strong belief in the healthier attributes of organic choices. According to a survey by the Federal Ministry of Food and Agriculture, "healthy eating" emerged as the fourth most prevalent reason for choosing organic products, accounting for 87%. 84% of consumers perceive organic food as a safer alternative, particularly in terms of genetically modified-free and minimally chemically treated options. Additionally, 74% of respondents associate organic products with food safety and the desire to consume items with minimal chemical exposure.[55] Another motive driving organic purchases is the **pursuit of prestige and status.** Prestige-seeking individuals are motivated to purchase organic food products primarily to project a positive image among their peers. This group seeks conspicuous consumption, aiming to be seen as responsible and forward-thinking consumers.[56]

BARRIERS TO BUYING ORGANIC

Conventional products are often perceived as more cost-effective (63%) due to their comparatively lower price point, partly driven by the **high-price image associated with organic** items. This perception is fueled by the visible price difference between conventional and organic options. Consumers believe that opting for conventional products can lead to immediate savings on their grocery bills, making them a practical choice, particularly when budget is limited.

This belief is reinforced by the perception of a **smaller selection** (36%). Many shoppers associate conventional products with a broader range of options available in supermarkets and grocery stores. They believe that conventional products encompass a larger variety of brands, flavors, and packaging sizes, providing them with more choices to fit their preferences and needs.

Challenges related to purchasing barriers arise from supply chain transparency issues and a lack of trust in environmental impact communication, as well. Growing **concerns about greenwashing** has led consumers to become more skeptical of sustainability claims, prompting them to conduct independent research to verify the authenticity of producers and their value propositions. This trend reflects a heightened emphasis on authenticity and transparency in the decision-making process.[57]

Additionally, the **availability** of conventional products in their local shopping areas (25%) contributes to the perceived cost savings. Consumers might find it more convenient to access conventional products in their immediate vicinity, making them

[51] Bundesministerium für Ernährung und Landwirtschaft: Ernährungsreport 2022, p. 14.
[52] Bundesministerium für Ernährung und Landwirtschaft: Öko-Barometer 2022, p. 14.
[53] Verbraucherzentrale.net: Regionale Lebensmittel - nicht immer aus der Region.
[54] Bundesministerium für Ernährung und Landwirtschaft: Ernährungsreport 2022, p. 12-13.
[55] Bundesministerium für Ernährung und Landwirtschaft: Öko-Barometer 2022, p. 14., Seegbarth, Barbara et al: Customer Value Perception of Organic Food: Cultural Differences and Cross-National Segments, cited from Emerald Insights, February 2016, p. 406.
[56] Seegbarth, Barbara et al: Customer Value Perception of Organic Food: Cultural Differences and Cross-National Segments, cited from Emerald Insights, February 2016, p. 406, Expert Interview with Boris Voelkel.
[57] Deloitte: Sustainability Trend Under Pressure 2022, p. 26, Bundesanstalt für Landwirtschaft und Ernährung: Trendreport Ernährung 2023, p. 10.

an attractive option, especially when organic products are not readily available in the same locations.[58]

1.2.3. Consumer Personas in Germany's Organic Market

Recognizing distinct consumer profiles is key to tailoring strategies that resonate with their unique needs, values, and preferences. The "Transition to Health-Consciousness with the First Child," "The Responsible Consumer Middle Ground," and "The 'Bio-Natives'" are three crucial segments to consider for effective engagement and communication.

Around 90% of specialty store purchases are made by women, often young or expectant mothers with higher education, prioritizing their family's health and being called the **"Transition to Health-Consciousness"**. Child-friendly spaces and sections for children's products, alongside catering to modern women's preferences like natural cosmetics, are pivotal for organic stores.

The **"Responsible Consumer Middle Ground"**, primarily aged 30 and above, resides mainly in urban cores and is amenable to point-of-sale and outdoor advertising. Their opinions are formed through media and rational discourse, with values centered on healthy living and ethical indulgence. They demand high product standards and are willing to financially honor these standards due to their commitment to social responsibility and quality.

"Bio-Natives", mainly aged mid-20s to mid-30s, exhibit a strong inclination towards organic food due to their awareness of varying food quality. Influenced by food scandals and health concerns, they demand more from purchases. They invest extra effort and cost, reflecting their values. They may opt for conventionally produced food due to circumstances but meticulously source information and evaluations through the internet and social media, especially concerning their children.[59]

1.3. Distinctive Drivers of the German Organic Food Sector

When looking at the driving forces for the development of organic agriculture in Germany over the past 20 years, they can be categorised as follows: Political drivers, market drivers and social drivers.

1.3.1. Political Drivers

POLICY-DRIVEN GROWTH OF ORGANIC AGRICULTURE IN GERMANY

German agriculture ministers at state and federal level stress the importance of organic as a sustainable alternative, at the latest under the first Green Federal Minister of Agriculture, Renate Künast (in this position from 2001 to 2005), that organic agriculture is a sustainable alternative to conventional agriculture and supports important ecological and social goals. Based on important decisions taken under Künast, organic agriculture in Germany has undergone a remarkable development over the last 20 years. A large number of political measures and initiatives have been instrumental in driving this development. Particularly worthy of mention here are the Federal Organic Farming Programme ("Bundesprogramm Ökologischer Landbau") launched in 2001, the Strategy for the Future of Organic Farming ("Zukunftsstrategie ökologischer Landbau") published in 2017, and action plans to promote organic farming at the level of the federal states. In addition, organic model regions ("Bio-Musterregionen" or "Öko-Modellregionen") were established in individual federal states to enable, network and promote regional networks.

GOVERNMENT INITIATIVES AND STRATEGIES FOR ORGANIC AGRICULTURE

At the political level, various instruments have been used to promote organic agriculture. These include, for example, the

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[58] PwC Konsumentenbefragung: Bio oder konventionell?, p. 5, Statista (2017): Wenn Sie kein Bio-Produkt kaufen, sondern zu einem konventionellen Produkt greifen, was sind die Gründe dafür?, https://de.statista.com/statistik/daten/studie/173556/umfrage/gruende-fuer-den-verzicht-auf-bioprodukte/, Mintel: The Ethical Food Consumer – Germany 2022.

[59] Oekolandbau.de: Zielgruppen im Bio-Handel, October 2020, marke41.de: KarmaKonsum goes Mainstream Teil 2: Zielgruppe „Bio-Natives".

introduction and continuation of state support programmes that offer financial incentives for farmers to switch to organic farming or to maintain this form of farming. The development and implementation of national and European guidelines and regulations, such as the EU Organic Regulation, have also advanced organic farming.

Furthermore, political decisions to promote organic farming at regional and municipal levels have played an important role. The creation of organic model regions and the support of regional marketing structures have contributed to the particularly strong growth of organic agriculture in certain regions of Germany[60].

POLITICAL MEASURES SHAPING THE ORGANIC LANDSCAPE

At the Biofach trade fair in February 2023, Federal Minister of Agriculture Cem Özdemir again emphasized that sustainable agriculture is the central guiding principle for the German Federal Government - and must be promoted and strengthened in the interest of society. He emphasized that organic farming is particularly effective in protecting the climate and biodiversity, soil, water and air. In this context, he reiterated the goal of 30% organic farming by 2030 - both in terms of cultivated land and on the shelves of retailers.

The central measure here is the Zukunftsstrategie ökologischer Landbau (Strategy for the Future of Organic Agriculture). The strategy is designed by the Federal Government to be interdepartmental and is intended to give new impetus for growth to the organic agriculture and food sector. The strategy for the future is currently being further developed with the involvement of the sector.

FEDERAL GOVERNMENT'S COMMITMENT TO ORGANIC AGRICULTURE

Another important lever that the Federal Ministry of Agriculture wants to use is the expansion of the share of organic products in out-of-home catering. The Federal Government would like to set a good example here by increasing the proportion of organic products of organic products in federal canteens to at least 30%. In spring 2023, the Organic Farming Act was amended with the aim of making it easier for canteens and other companies in the out-of-home catering sector to obtain organic certification. For this purpose, a simple and transparent logo was developed, which makes the share of organic products in canteens visible.

At the production level, higher organic premiums were introduced as part of the national implementation of the Common Agricultural Policy (CAP). In addition, the funding amount of the Bundesprogramm ökologischer Landbau (Federal Organic Farming Programme) was increased to almost € 36 million. An important component of the federal programme is the targeted strengthening of organic value chains. In addition, € 4 million in funding was added to the existing protein crop strategy. The new and binding animal husbandry labeling will include a separate organic level.

In addition, 30% of the agricultural research budget will be allocated to future organic research.

CHALLENGES AND CRITIQUES OF ORGANIC AGRICULTURAL POLICIES

In order to make the environmental and climate benefits of organic farming more visible to the public, Özdemir has announced an information campaign for organic farming. This is to be published in autumn 2023. The aim of the campaign is to enable consumers to make well-informed decisions.

Despite these many measures and actions, there is a certain dissatisfaction within the German organic sector with the policies of the Green Minister of Agriculture. Overall, his policy is perceived as being too cautious to actually achieve the 30% organic farming target by 2030 that the federal government itself has set.

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60 Oekolandbau.de: Was bringen uns Öko-Modellregionen?, May 2023.

1.3.2. Market Drivers

Another important driver for the development of organic agriculture in Germany is the changes in the market. Over the last 20 years, the demand for organic products has increased continuously. Consumers are increasingly willing to pay more for organically produced food and value transparency and sustainability in food production.

This increased demand has led to more and more farmers converting to organic farming in order to benefit from the growing market opportunities. Retailers have also responded by expanding their range of organic products. The introduction of organic labels and certifications has also helped consumers to recognise and choose organic products more easily.

At the market level, it was in particular the entry and the expansion of supply by food retailers and discount stores, as well as new types of cooperation, for example between discount stores and organic producers' associations (see for further details in the subsequent chapter on organic farmers' associations).

1.3.3. Social Drivers

In addition to political and market drivers, social developments also play an important role in the development of organic agriculture. Increasing public awareness of environmental and health issues has led to more and more people perceiving organic farming as a sustainable and healthy alternative to conventional farming. This has been an important driver for the growth of the organic sector over the past 20 years.

Civil society, environmental organizations and consumer associations have campaigned and educated for organic farming. They have informed consumers about the benefits of organic farming and helped raise awareness of organic farming.

Also, health crises like Chernobyl, BSE, Fukushima, and the COVID-19 pandemic have been crucial social drivers for the growth of the organic market in Germany, spurring shifts in consumer behavior and dietary preferences, and resulting in leaps of development larger than in other European countries. These crises have highlighted the German population's tendency to modify eating habits in response to significant health concerns.[61]

In addition, social trends such as the desire for regional and seasonal products have contributed to organic growth in recent years.

1.3.4. Summary

Based on increased consumer awareness of sustainably and ecologically produced products, both industry and the public sector have made investments and efforts to expand the German organic market year after year. In most cases, pull and push strategies went hand in hand: the public sector created good conditions for conversion to organic farming through support programmes, subsidised advisory services and support for farmers. In addition, public communication stimulated more demand for organic products. Within this optimised framework, the industry invested in the conversion of further processing capacities and in the increased presence of organic products produced in Germany in the trade.

1.4. Organic Farmers' Associations

1.4.1. Emergence of Organic Farmers' Associations in Germany

Organic agriculture has experienced a remarkable upswing in Germany in recent decades. Organic farming associations play an important role in the development and promotion of this sector. These associations have been formed over the last decades to represent the interests of organic farmers as well as manufacturers and to promote organic farming in Germany.

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[61] Expert interviews with Dr. Jürn Sanders and Boris Voelkel.

The establishment of today's most relevant organic farming associations dates back to the beginnings of the environmental movement in the 1970s. At that time, a few pioneers began to develop and try out alternative farming practices. These pioneers recognised the need to organise themselves and to pool their interests in order to pursue their goals more effectively. Thus, the first organic growers' associations emerged to promote organic farming and develop guidelines for organic production.

As of today, roughly half of all organic farms in Germany are members of a growers' association and benefit from their expertise in advisory services, marketing and political representation. Furthermore, organic farms manage around 64% of the total organic farmland and adhere to association guidelines that go beyond the requirements of the EU Organic Regulation and the German organic seal.[62]

The farmers' associations best known and most trusted among consumers include Bioland, Naturland and Demeter.[63] In addition, the associations Ecoland, Biokreis, Biopark, Gäa, the Verbund Ökohöfe as well as Ecovin, the largest association of organically working wineries, shape the agricultural policy landscape in Germany.

Certain farming associations, such as Biokreis and Ecoland, place a high value on regional management. Bioland is active in Germany and South Tyrol. Occasionally, Bioland also accepts farms and partners from neighboring regions in order to facilitate the shortest possible transport routes from the producer to the processor.[64] Other associations, namely Demeter and Naturland, are internationally active associations whose sphere of influence extends beyond Germany. Demeter claims to be represented on all continents as an international organic brand.[65] Naturland reports that around 140,000 farmers in almost 60 countries are members of its globally active.

1.4.2. Importance of Organic Farmers' Associations Within the Market

Organic growers' associations play a central role in the market for organic products in Germany today. They ensure that products bearing the organic label meet complementary and consistently higher standards. The associations have developed their own guidelines for the cultivation and processing of organic products, which members must adhere to. This gives consumers additional assurance that they are buying products that are actually organic and, in many cases, produced in the region.

In addition, organic growers' associations offer farmers a wide range of support services. They offer training and advisory services to help farmers convert to organic farming. The associations also organise the exchange of knowledge and experience between members, thus promoting the further development of organic farming.

Today, the organic farming associations have a central role in the marketing of organic products - to some extent this corresponds to a bottleneck function. Here it is particularly important to take into account the framework agreements of the large organic growers' associations with food retail companies and discounters that have emerged since the end of the 2000s. Organic growers' associations support their members in bundling and marketing their products and help them to find access to sales markets. Through their presence at trade fairs and events, the associations help to raise awareness of organic products in society and promote sales of organic products.

[62] Bund Ökologische Lebensmittelwirtschaft: Branchenreport 2023, p. 8-9.
[63] Statista: Welches dieser Prüf- und Gütesiegel aus dem Bereich Lebensmittel kennen Sie bzw. vertrauen Sie?, https://de.statista.com/statistik/daten/studie/166363/umfrage/bekanntheit-der-pruef--und-guetesiegel-von-lebensmitteln-2010/.
[64] Bioland.de: Der Bioland-Verband.
[65] Demeter.de: Über uns.

OVERVIEW OF FRAMEWORK AGREEMENTS BETWEEN ORGANIC GROWERS‘ ASSOCIATIONS AND FOOD TRADING COMPANIES AND DISCOUNTERS

Trading Company	Farmers‘ Association	Start of Partnership
REWE	Naturland	2009
EDEKA Südwest	Bioland	2012
LIDL	Bioland	2018
Kaufland	Demeter	2019
Norma	Naturland	2019
REWE	Demeter	2020
EDEKA Zentrale	Demeter	2020
EDEKA Zentrale	Bioland	2022
EDEKA Zentrale	Naturland	2022
Kaufland	Bioland	2023
ALDI (Süd and Nord)	Naturland	2023
Netto	Naturland	2023

1.4.3. Importance of Organic Farmers’ Associations for Policy Making

Organic growers’ associations are also of great importance for policy-making in the field of organic agriculture. They represent the interests of organic farmers vis-à-vis policy-makers - bundled through the industry umbrella organisation BÖLW, but also individually - at both state and federal level - and campaign for sustainable agricultural policy. The associations take part in political discussions, contribute their expertise and make proposals for political measures to promote organic agriculture. The organic farming associations are directly involved in the shaping of laws and regulations, in particular through their representations at the level of the federal states.

1.4.4. Certification Options for Foreign Producers

Traditionally, there are many organic farming associations in Germany. However, of the nine associations currently in existence, only Bioland, Naturland and Demeter have any significance in the organic food trade and conventional food retailing. As a special feature, Bioland only exists in Germany and traditionally in South Tyrol - therefore it is not possible for Dutch producers and processors to obtain Bioland certification. This leaves Demeter and Naturland as possible association partners for Dutch production and processing businesses to enter the German market with association quality.

Demeter International already has a contact point in the Netherlands in the form of Stichting Demeter (full member of Demeter-International since 1997). With reference to the conventional German food retail trade, it should be mentioned that Demeter has contractual agreements with the food retailers Edeka Zentrale, Rewe and Kaufland.

CERTIFICATION OPTIONS WITH NATURLAND

The Naturland Association for Organic Agriculture was founded in 1982 with headquarters in Gräfelfing near Munich with the aim of promoting organic agriculture worldwide. Internationally, around 140,000 farmers in 60 countries cultivated a total area of 440,000 hectares in 2022. According to its own statement, Naturland already has 14 member operations in the Netherlands. In Germany, Naturland currently has more than 4,500 member companies. This makes Naturland the largest international association for organic agriculture from Germany.[66]

In addition to Naturland-certified farmers, all processing companies also produce according to Naturland's standards. Naturland's standards are stricter than the EU's organic regulation - for example, since 2005 Naturland has had additional social standards in place to check the social conditions in the production and processing of its products as part of the certification process. Since 2010, Naturland has also offered fair trade certification - as a voluntary add-on that builds on Naturland's organic certification. In addition to Naturland's basic standards, requirements in the field of social standards, reliable trade relations, fair producer prices, regional sourcing of raw materials, community quality assurance, social commitment and corporate strategy and transparency have to be proven. As a further special feature, Naturland has standards on organic forest management and organic aquaculture.

All producers and processors are organised in the Naturland Association. This is where work on standards, political lobbying and advice to association members takes place. Founded in 1992 and independent of the association, Naturland Bauern AG is today one of the largest German organic producer associations with a focus on meat and grain marketing. More than 1,050 farmers are shareholders in the market company.

Naturland Zeichen GmbH is responsible for licensing and awarding the Naturland trademark, the Naturland Fair Trade trademark and the Naturland Wild Fish trademark. Naturland Zeichen GmbH has a worldwide network also in the direction of processors and wholesalers as well as the specialist organic food trade and food retailers. In order to obtain a recognised Naturland certification, the GmbH is the point of contact.

The Naturland association has been a partner of the Rewe Group for many years. For some time there has also been a contractual partnership with Norma and Edeka Zentrale and since 2023 also with Aldi Süd and Aldi Nord. A contractual preliminary agreement between Naturland and Netto around the organic own brand BioBio is about to be signed.

A BRIEF GUIDE TO NATURLAND CERTIFICATION

1. Get in touch with Naturland by contacting an expert responsible for your region. You can get their contact information on the Naturland website.

2. Sharing Information: Naturland will provide you with information tailored to your needs while requesting insights into your business.

3. Formalizing Collaboration: The partnership between your business and Naturland is established through a contractual agreement.

4. Inspection Process: An independent inspection body, endorsed by Naturland, assesses your practices to align them with Naturland standards.

5. Certification Decision: The Naturland certification committee reviews the inspection results to determine if your farm qualifies for Naturland certification.

6. Naturland Branding Opportunities: Upon certification, you gain the privilege to showcase the prestigious Naturland trademark. This privilege is regulated through a separate contract, specifically a sublicense agreement with Naturland Zeichen GmbH.

66 Naturland.de: Länderliste für Beitrag „International".

1.5. Trade Requirements

1.5.1. Relevant Local Laws

IMPORT REGULATIONS

In Germany, the enforcement of food legislation, including import requirements, is the responsibility of the federal states (Bundesländer). To determine whether a specific product meets import criteria, an evaluation is conducted considering the product's composition, intended purpose, and presentation.[67] For guidance in interpreting and applying legal provisions in specific cases, you have several options:

- Reach out to the appropriate stakeholder association if you are a member.
- Consider hiring a food expert to assess a product's compliance with relevant regulations. You can find expert addresses through the local Chamber of Industry and Commerce (IHK).
- Contact the relevant local food inspection authority, typically based at the food business or importer's location in Germany. Ministries of the Länder can provide information about these authorities.

MANDATORY PACKAGING REQUIREMENTS

All packaging needs to align with the regulations set forth by the German Packaging Act implemented on January 1st, 2019. Ingredients listings, details about allergens, and fundamental labeling practices adhere to the guidelines of the EU's food labeling regulations. These rules are readily available for review on the official websites of Your Europe or the BMEL's.

1.5.2. Relevant Organic Control Bodies and Certifiers

In Germany's federal structure, 16 supervisory authorities across the states are responsible for overseeing 17 approved inspection bodies active in the market. Private inspection bodies conduct spot checks to ensure companies adhere to EU organic farming regulations. Inspection agreements are made between operators and inspection bodies, ensuring compliance with organic farming laws. The bodies annually inspect agricultural holdings, processors, and importers, with more checks if needed. Inspected entities cover inspection costs. Inspections involve procedural checks, occasional product inspections, and risk-oriented sampling. Suspicious cases lead to product or soil samples and residue analysis.[68]

REQUIREMENTS FOR INSPECTION

Regulation (EC) No 889/2008, Articles 63 to 92, outlines inspection requirements for agricultural holdings, processors, stock keepers, distributors, and importers. Producers and processors must detail areas used in organic production. Holdings record inputs and products in all processing stages. Sales must be documented, including what, how much, and to whom, ensuring traceability of organic products to producers.[69] More information on where the inspection bodies are located and which products they check can be found on the website of Ökolandbau.

[67] Bundesministerium für Ernährung und Landwirtschaft: German regulations on the import of food, July 2020.
[68] Bundesministerium für Ernährung und Landwirtschaft: Controls in organic farming, March 2021.
[69] Bundesministerium für Ernährung und Landwirtschaft: Controls in organic farming, March 2021.

1.5.3. Product Requirements and Recommendations

ORGANIC CERTIFICATION

In accordance with practices seen throughout Europe, the cornerstone of labeling organic products is the European Union's organic logo.

In Germany, the option of the Bio-Siegel (organic seal), established in 2001, is also available. This supplementary Bio-Siegel can be employed voluntarily alongside the obligatory EU organic logo. Every product adorned with the Bio-Siegel must be registered with the Bio-Siegel Information Office prior to its marketing. This registration should adhere to the graphical specifications laid out in the Bio-Siegel Ordinance, with no associated fees. The privilege of using the Bio-Siegel necessitates producers to hold certification in alignment with EU organic farming regulations. Additional information, as well as tailored checklists for traders, producers, and import firms, can be accessed at Ökolandbau.de, Germany's leading resource for organic farming information.

Distinct from these, the Verbandssiegel (association seal) represents German production associations like Bioland, Demeter, or Naturland. These seals signify products that adhere to the more stringent regulations set by these associations, surpassing the basic requirements of the EU's organic production regulation. To explore certification processes, please check Chapter 1.4.

VOLUNTARY LABELLING

Starting from November 2020, food packaging has had the option to include the voluntary Nutri-Score label, also known as the 5-Colour Nutrition label. This label provides consumers with quick and easy-to-understand nutritional information about the product. Additionally, as part of the European Commission's initiative to establish a standardized framework for sustainability labeling of food, products can feature the Planet-Score, offering insights into the environmental impact of the food.

Other relevant and voluntary labels include the VLOG label, certifying GMO-free food, and the Regionalfenster label, which is a voluntary labeling scheme helping consumers identify the origin of a product's main ingredients and where they have been processed.

In a similar vein, the new Tierhaltungskennzeichnung (Animal Husbandry Label) has become mandatory for animal products originating from Germany, starting with pig meat and providing transparency to consumers whether they're at the meat counter, supermarket, or shopping online. This empowers consumers to make informed purchasing choices and consciously opt for various forms of animal husbandry. Simultaneously, this mandatory labeling highlights the efforts of farmers to enhance animal welfare. Enterprises from other countries, especially EU member states, can voluntarily participate in this labeling initiative. While the German government sought a comprehensive labeling requirement for all products, including imports, EU and WTO regulations limit the scope. Nonetheless, producers from other EU countries and third-party nations can voluntarily use the Tierhaltungskennzeichen label, further advancing consumer awareness. To register, the foreign production facility has to contact the Federal Agency for Agriculture and Food (in writing or electronically, in German or English). More information about the registration process can be found on the Federal Agency's website.

1.6. Market Entry

1.6.1. Opportunities for Dutch Companies of the Organic Food Sector

UTILIZING IMPORT STATISTICS FOR GERMAN MARKET INSIGHT

In order to prepare well for the market entry of Dutch producers into the German market, we advise to obtain the latest statistics on organic imports towards the German market from the AMI. These statistics provide information on how high the degree of self-sufficiency is in Germany in the respective product line and in which products there are any chances at all to supply the German organic market.

BUILDING CONNECTIONS AND MARKET UNDERSTANDING AT PROMINENT TRADE FAIRS

In order to better understand the German organic market and get to know important players, participation at the relevant food trade fairs such as Anuga in Cologne, Biofach in Nuremberg, Eurotier in Hanover and Fruit Logistica in Berlin is certainly a good basis. Within the framework of these important trade fairs, there is the opportunity to talk to the traders as well as relevant raw material bundlers and suppliers. The in-house fairs of the food retail trade are also of great importance: Edeka and Rewe in particular, but also Alnatura, invite existing suppliers to these important (internal) fairs. In addition, it is important to use all contacts to chambers of commerce etc. to generate and consolidate access to the German trade. However, in order to market larger quantities in the direction of the conventional food retail trade, other preparatory work and approaches are needed. It is fundamentally important to bundle quantities and assortments at best and to present a powerful offer to the German trade. An important lever would be, for example, the establishment of a broker for marketing in the German market, by establishing a central contact person, as well as to use the Dutch embassy in Berlin to gather further specific information and contact details of German businesses and ask their assistance as a liaison, as we believe it would be much easier to gain access to the relevant contact persons at the level of the four large trading companies Rewe, Edeka, Aldi and Lidl. Some time ago, the Edeka head office bundled its organic activities in a new company called Naturkind Lebensmittelvertriebs-GmbH. The special feature is that under the Naturkind brand, both a range of partly association-quality products is being built up and an initiative to establish independent, purely organic stores.

OVERCOMING CHALLENGES TO ENTER GERMAN'S BIG FOUR MARKET PLAYERS

It is particularly difficult to gain access to the big four (Edeka, Rewe, Aldi and Lidl) of the German food retail trade. We therefore recommend exploring the possibility of the Dutch embassy in Berlin acting as an advisor or door opener. The advisor could help with initiating contact with relevant trade representatives for Dutch market players. The Schwarz Group (Kaufland and Lidl) and Aldi Süd now have representative offices in Berlin with contacts especially for the agricultural and food sectors. Among other things, the representatives in Berlin have the task of representing the interests of the trading companies vis-à-vis political stakeholders at the federal level (especially in the policy fields of agriculture and nutrition), of establishing or expanding a relevant network of external stakeholders and of providing information for and advice to internal specialist departments. Contact can be made, for example, via the German capital city representatives of the Schwarz Group in Berlin or via public affairs consultants at ALDI SÜD. It is important to approach retailers with a product range proposal that is as concrete as possible.

UNDERSTANDING THE IMPACT OF ASSOCIATION LABELS ON RETAIL

The requirement of using a trade mark of an organic farmers association, which is increasingly desired by retailers, can be a hurdle to entry. Today, it is impossible to imagine retail without the association labels. Due to the framework agreements that Bioland, Naturland and Demeter in particular have concluded with the big players in the German food trade, one can today almost speak of market access requirements for potential organic importers. In other words, it is recommended that the Dutch organic sector carefully investigate which organic farming associations that are relevant in Germany are also active in the Netherlands and can be used for export. Since Bioland has traditionally limited its production area to

Germany and South Tyrol, we make the clear recommendation to enter into more in-depth discussions with Naturland and Demeter in particular and to consider cooperation projects for specific product groups and ranges. In order to take a step forward here, we urgently recommend contacting Naturland and Demeter to sound out market opportunities and possibilities.

PRIORITIZING RETAIL AND DISCOUNT SECTORS OVER E-COMMERCE AND OUT-OF-HOME

The online retail sector in Germany is traditionally not as strongly characterized as in neighboring countries. This also applies to the organic market. Increasing importance is attributed to the area of out-of-home catering. This is seen as an important lever for the further expansion of organic agriculture. Both the federal government and some of the federal states are currently investing heavily in support programmes to expand organic products in the out-of-home catering sector. Nevertheless, the share of organic products in out-of-home catering is currently only 1.3%, whereas the share of organic food in total food sales in Germany in 2022 was around 7%. In view of the fact that both e-commerce and the out-of-home market do not currently play a major role within the German organic market, we recommend focusing more on other segments or taking a look at the market accesses explained elsewhere, particularly in the area of conventional food retailing and discounting.[70]

COMMUNICATING BENEFITS AND SHOWCASING DUTCH STRENGTHS IN ORGANIC MARKETING

In the case of the Netherlands, Boris Voelkel envisions alternative marketing ideas such as leveraging their unique stereotypes, agricultural advantages, and strengths (for example, unlike export countries in Southern Europe, the Netherlands doesn't face the same critical water shortages), filling gaps in the market, and strategically communicating advantages as add-ons. This can resonate well with consumers who are increasingly concerned about the environmental impact of their choices.[71] More information on supply gaps in the German organic market can be found in chapter 1.1.1 under the subheadlines Regional Variations in Organic Farming and Consumption and Germany's Trends in Organic Food Imports.

ESSENTIAL CONTACTS IN THE GERMAN ORGANIC FOOD MARKET

To facilitate informed decision-making, addresses of the wholesalers were added, as recognizing the geographical distribution of business partners becomes a pragmatic factor with a substantial impact on operational efficiency. Producers can strategically choose partners based on their proximity, minimizing transportation costs and delivery times. This holds particular significance for perishable goods that require swift delivery to maintain freshness. Close geographical proximity also fosters regular in-person interactions, enhancing relationships and potential collaborations with wholesalers. Moreover, this awareness offers insights into local market dynamics and preferences, aiding informed decisions on product offerings and pricing strategies. Furthermore, aligning with the preferences of consumers who prioritize regional products adds an extra layer of relevance to this practice.

[70] Bundesverband Naturkost Naturwaren (BNN) e.V.: Bio außer Haus: Die Ampel steht auf grün.
[71] Expert Interview with Boris Voelkel.

OVERVIEW OF GERMAN ORGANIC WHOLESALE BUSINESSES

Name	Location and Delivery Area	Contact Info
NATURAL FOOD WHOLESALERS		
Bodan Großhandel für Naturkost GmbH	88662 Überlingen	Phone: +49 7551 / 9479-0 Mail: info@bodan.de Web: www.bodan.de
Chiemgauer Naturkosthandel GmbH	83567 Unterreit	Phone: +49 8638 / 9877-0 Mail: buero@chiemgauer.com Web: www.chiemgauer.bio
Naturkost Elkershausen GmbH	37079 Göttingen	Phone: +49 551/ 50661-0 Mail: info@naturkost-elkershausen.de Web: www.naturkost-elkershausen.de
Naturkost Erfurt GmbH	99091 Erfurt	Phone: +49 361 / 56 55 06 800 Mail: info@naturkost-erfurt.de Web: www.naturkost-erfurt.de
C.F. Grell Nachf. Naturkost GmbH & Co. KG	24568 Kaltenkirchen	Phone: +49 4191 / 9503-0 Mail: info@grell.de Web: www.grell.de
Kornkraft Naturkost GmbH	26197 Großenkneten	Phone: +49 4487/ 921-0 Mail: info@kornkraft.com Web: www.kornkraft.com
Ökoring Handels GmbH	82291 Mammendorf	Phone: +49 8145/9308-30 Mail: zentrale@oekoring.com Web: www.oekoring.com
pax an Naturwaren-handelsgesellschaft mbH	72829 Engstingen	Phone: +49 7129/ 141-0 Mail: info@paxan.de Web: www.hakopaxan.de
Rinklin Naturkost GmbH	79356 Eichstetten	Phone: +49 7663/ 9394-100 Mail: info@rinklin-naturkost.de Web: www.rinklin-naturkost.de
Terra Naturkost Handels KG	12347 Berlin	Phone: +49 30 - 63 99 93-0 Mail: info@terra-natur.de Web: www.terra-natur.de
Naturkost West GmbH	47167 Duisburg	Phone: +49 203/ 5707-70 Mail: info@naturkost-west.de Web: www.naturkost-west.de
Bode Naturkost GmbH	21031 Hamburg	Phone: +49 (0) 40 739 332 0 Mail: info@bode.bio Web: https://www.bodenaturkost.de/

OUT-OF-HOME CATERING

apetito AG	48432 Rheine Delivery area: nationwide	Phone: +49 5971 799-0 Mail: info@apetito.de Web: www.apetito.de/
CHEFS CULINAR Nord GmbH & Co. KG	24145 Kiel Delivery area: nationwide	Mail: info-ki@chefsculinar.de Web: www.chefsculinar.de/index.htm
EPOS BIO PARTNER SÜD GMBH	85652 Pliening / Landsham Delivery area: nationwide	Phone: +49 89 90 90 19-0 Mail: info@bio-partner.de Web: www.bio-partner.de/
Transgourmet Deutschland GmbH & Co. OHG	64560 Riedstadt Delivery area: nationwide	Phone: +49 6158 180-1000 Mail: kontakt@transgourmet.de Web: www.transgourmet.de/

ORGANIC MEAT

Thönes-Natur Schlachterei Thönes e.K.	47669 Wachtendonk Delivery area: core region of North Rhine-Westphalia (Cologne-Münster), nationwide via freight carrier	Phone: +49 28 36 – 91 400 Mail: info@naturverbund.de Web: www.naturverbund.de/
Altdorfer Biofleisch	84032 Altdorf Delivery area: nationwide	Phone: +49 871/93231-0 · Mail: info@kottmayr.com Web: www.altdorfer-biofleisch.de/
Bakenhus Biofleisch GmbH	26197 Großenkneten Delivery area: nationwide	Phone: +49 4435-971608 Mail: r.breuer@bakenhus-biofleisch.de Web: www.bakenhus-biofleisch.de/
Bio Rind und Fleisch EZG GmbH	54317 Gusterath Delivery area: Saarland, Rhineland-Palatinate, Hesse, southern NRW	Phone: +49 6588-983 93-05 Mail: traxl@biorind.de Web: www.biorind.de/
Biofino GmbH	49685 Emstek Delivery area: nationwide	Phone: +49 4473 9413-0 Mail: info@biofino.de Web: www.biofino.de/

VEGAN PRODUCTS

Life Food GmbH - Taifun-Tofuprodukte	79108 Freiburg Delivery area: Germany and Europe	Phone: +49 761 - 152 10 0 Mail: info@taifun-tofu.de Web: www.taifun-tofu.de/de
Topas K. Gaiser GmbH	72116 Öschingen Delivery area: nationwide	Phone: +49 7121/820 17 40 Mail: topas@ibh-datenschutz.de Web: www.wheaty.de/

OTHER

Grain processing: Bohlsener Mühle	29581 Bohlsen Delivery area: nationwide (dry goods), Hamburg, Bremen, Hanover, Wolfsburg, Braunschweig (bread, baked goods)	Phone: +49 5808 987 0 Mail: info@bohlsener-muehle.de Web: www.bohlsener-muehle.de/
Grain processing/ Dry Goods: Naturata AG	71672 Marbach am Neckar Delivery area: nationwide	Phone: +49 71 44 - 89 61 - 0 Mail: kontakt@naturata.de Web: www.naturata.de/
Dry Goods: Rapunzel AG	87764 Legau Delivery area: nationwide, Austria	Phone: +49 8330 / 529 - 0 Mail: info@rapunzel.de Web: www.rapunzel.de/
Bakery products: Siegfried Schedel	96250 Ebensfeld-Unterneuses Delivery area: nationwide	Phone: +49 95 73 / 22 22-0 Mail: info@schedel-biobrot.de Web: www.schedel-biobrot.de
Vegetable distribution: Demeter Felderzeugnisse GmbH	64660 Alsbach Delivery area: nationwide	Phone: +49 6257-9340-0 Mail: demeter@felderzeugnisse.de Web: www.felderzeugnisse.de/en/organic-raw-materials/
Vegetable distribution: Marschland Naturkost GmbH	21762 Otterndorf Delivery area: nationwide	Phone: +49 47 51 / 9 157 0 Mail: info@alfredpaulsen.de Web: www.alfredpaulsen.de
Poultry distribution: Freiland Puten Fahrenzhausen GmbH	85777 Fahrenzhausen Delivery area: nationwide	Phone: +49 8133-99620 Mail: info@freilaender.de Web: www.freilaender.de/
Spices and Tea: Herbaria Kräuterparadies GmbH	83730 Fischbachau Delivery area: nationwide and Europe	Phone: +49 8028 9057-0 Mail: info@herbaria.de Web: www.herbaria.com/?lang=en
Oils: Teutoburger Ölmühle GmbH & Co. KG	49477 Ibbenbüren Delivery area: nationwide	Phone: +49 5451 9959-0 Mail: info@teutoburger-oelmuehle.de Web: teutoburger-oelmuehle.race-camp.com/startseite/
Jams and Preserves: Maintal Obstindustrie	97437 Haßfurt Delivery area: nationwide	Phone: +49 9521/9495-0 Mail: info@maintal-konfitueren.de Web: maintal-konfitueren.de/en/start.html

1.6.2. Challenges for Dutch Companies of the Organic Food Sector

REGIONAL EMPHASIS IN GERMAN ORGANIC MARKET

The biggest challenge for Dutch organic producers is the fact that in Germany the topic of regional origin of food has become enormously important also in the organic sector. A definition of this concept can be found in chapter 1.2.2. In concrete terms, this means that wherever this is possible in terms of price, the retail trade will first use regional organic goods. Among other things, the Regionalfenster is also increasingly used on organic products - and often makes it difficult for Dutch producers to enter the market.

NAVIGATING CHALLENGES WITH MAJOR RETAILERS

Another challenge is the fact that it is very difficult to contact the big four of the conventional food retail trade Edeka, Rewe, Aldi and Lidl. See our recommendation on how to proceed in chapter 1.6.1.

NAVIGATING INCREASED LISTING OF ASSOCIATION QUALITY PRODUCTS

Last but not least, there is the challenge of increased listing of products produced under the trademark of organic farmers associations. As described in chapter 1.4., the German trade is listing more and more domestic organic farmers association products, so it makes sense for Dutch producers to explore the possibilities of producing in association quality themselves.

2. Recommended Promotion and Strengthening Strategies for the Dutch Organic Food Sector

2.1. Based on Germany's Promotion and Strengthening Strategies

The recommendations given in this chapter are mainly based on a total of four expert interviews, our collaboration with Prof. Dr. Jan Niessen and the authors' own expert assessments.

HARNESSING POSITIVE NARRATIVES: MEDIA'S ROLE IN ORGANIC PROMOTION

In general, the media attention for organic should not be underestimated. Media play a significant role in both driving the normalization of organic products and acting as a constraint, as highlighted by the expert Mr. Sanders. According to his perspective, they have "fulfilled their role" by reporting critically on organic products, which has resulted in fostering mistrust among the public. However, given that the media is a crucial influence, there is a need to recalibrate their role and stance to continue contributing to the positive image of organic products. However, this applies not only to journalism. but to the entire organic sector: As the experts note, it is critically important for the organic sector to tell positive stories about the way its products are produced - including challenges such as climate change and sustainability in general. Such stories can be used to communicate the pioneering role of organic farming in an overall sustainable food and farming system.

HARMONIZING ORGANIC VOICES: CHALLENGES AND OPPORTUNITIES

Organic farmers associations are associations of organic farmers, processors and other agricultural producers for the purpose of promoting the joint marketing and control of the association's products. In addition, organic growers' associations provide adequate and profound advice for converting and practicing organic producers and lobby for the political interests of the sector at the level of the federal states and the federal government.

In Germany there are a total of nine farmers associations, of which Bioland, Naturland and Demeter in particular have nationwide significance and importance in the trade sector.

A disadvantage is the large number of organic growers' associations, some of which are only represented regionally. This often makes it difficult for political representatives to know whom they can turn to and who has the political legitimacy to speak for the entire organic sector. In addition, the different labels and the highlighting of sometimes very small differences are rather confusing for consumers. In addition, the many duplicate structures and frequent "competition" for individual production farms and marketing channels, which is not conducive to sector development, should be viewed critically. The examples of Denmark and Austria show that it is possible to work successfully as a unit and to achieve a lot. The clear recommendation to the Netherlands is to establish and push a single seal or trademark and to make it known among the population.

Looking back on the past 25 years, the role of the German organic farmers' associations in shaping the political framework conditions as well as the market realities is enormous. They have been instrumental in changing the image of organic farming in society, and organic farming has now reached the "centre of society". Of particular importance here was the fact that farmers association goods no longer became available only in organic food shops, but also in conventional food trading companies as well as in discounters. The farmers' associations have systematically contributed their expertise to policy-making, acted as a corrective, and struggled and fought for the "right" support measures. It is not least thanks to their political work that the promotion policy has been so constant and reliable over all these years.

The three large associations Bioland, Naturland and Demeter in particular have taken the area of marketing into their own hands since around 2008-2015 - and have firmly established their respective association seals as genuine brands with enormous awareness and trust in the market. The decisive success factor in recent years has been the willingness of the organic growers' associations to enter into contractual cooperation with conventional food retailers. After this change in behavior of the German organic associations towards supermarkets (and later also towards discounters - see the corresponding contractual agreements with Lidl, Aldi, Netto and Norma that exist in the meantime) there was a boost for organic development.

FROM NICHE TO MAINSTREAM: THE EVOLUTION OF ORGANIC ACCESSIBILITY IN THE GERMAN MARKET

An important factor was the relatively constant growth rates in the natural food trade as well as in the conventional food retail trade that led to the fact that the share of organic products on the market also increased successively and without major fluctuations. An important driver was certainly the increased listing of organic association goods in conventional food markets and discounters. This has fanned a veritable competition for the "best organic" from the region.

In the market itself, the introduction of separate shelves for organic products in retail shops as well as the complementary integration of organic articles into the general shelves is seen as an important development. Likewise, the German organic label introduced under Renate Künast (based on the European Basic Regulation) has contributed to the growth of the market. Since the early 2000s, all conventional food retailers have included organic on their shelves. As a result, the accessibility of organic was massively increased - more and more people outside the organic bubble, as a result, came into contact with organic. The way out of the niche and the "delicatessen image" and into the discounter were the beginning of a success story. Similarly, the campaigns of the conventional food retailers also specifically addressed new target groups. Older generations, for example, were addressed via health issues and allergies, whereas students were addressed in terms of a favourable price.

DRIVING GROWTH: INSIGHTS INTO PROMOTIONS AND AND STRATEGIES

In February 2002, the then Federal Government launched the information campaign "Bio-Produkte haben's drauf". With this broad-based information campaign, the Federal Minister for Consumer Affairs, Renate Künast, wanted to make the then newly created state organic seal known - which she also succeeded in doing in view of the current awareness of the seal: A recent study stated that 92% of its participants are familiar with the German organic label by name or recognize its logo, making it the best-known organic seal in Germany, ahead of the organic farming associations and the EU organic seal.[72] With a clear and catchy message, consumers were given a simple orientation aid with the basic idea: "Where organic is on it, organic is in it" ("Wo Bio draufsteht, ist auch Bio drin"). As a result, the German organic label was quickly placed on very many organic products by farmers, processors and retailers. The information campaign had a budget of € 7.5 million and was flanked by a nationwide poster campaign and TV spots. In addition, advertisements were placed in consumer and trade magazines. The primary aim of the Federal Ministry's campaign from 2002 was to convey a sense of security

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[72] Statista (2023): Welches dieser Prüf- und Gütesiegel aus dem Bereich Lebensmittel kennen Sie bzw. vertrauen Sie?, https://de.statista.com/statistik/daten/studie/166363/umfrage/bekanntheit-der-pruef--und-guetesiegel-von-lebensmitteln-2010/

around organic products and to show that organic products can be trusted. It is important to bear in mind that the campaign was conceived in the aftermath of the BSE crisis - a time when German consumers' feeling of safety in food was massively shaken.

„The national organic seal: A seal from apple to onion“ / © Oekolandbau.de

During his opening speech at Biofach, the world's leading organic trade fair, Federal Minister of Agriculture Cem Özdemir announced an information campaign in February 2023. Details are not yet known. This would be the first time in more than 20 years that the federal government is again generically promoting the topic of organic - a topic that has recently been promoted by food retailers and discounters in particular.

Instead, since the end of the campaign in autumn 2002, trading companies such as Plus (today Netto) began to publicize its new organic brand broadly and effectively - and in particular to convince broad sections of the population that organic is affordable. The motto at the time was "OrganicOrganic - the small prices" ("BioBio - die kleinen Preise"). Since the beginning, the articles have all been labeled with the national organic seal as well as a brand-owned BioBio logo - the uniform design contributes to the recognition effect of the organic products in the product groups. In addition, the discounter can offer the articles at a lower sales price than would be possible with brand products. This gives occasional shoppers the opportunity to pick up organic products as part of their normal weekly shopping routine. The goods have been placed in the assortment since the beginning, right next to the conventionally produced product, taking advantage of mixed shelving instead of placing organic own shelves in the shop. Recently, Netto celebrated the 20th anniversary of this brand with several commercials. The BioBio campaign by Plus (now Netto) gave consumers the feeling from the outset that everyone could afford organic food. This campaign was a milestone in taking organic out of the niche and establishing it in the minds of consumers as something normal and within everyone's reach.

"Wir feiern JuBioläum! I 20 Jahre BioBio I NETTO" / © Netto Marken-Discount

The next big organic campaigns were launched by Lidl on the occasion of its partnership with Bioland and Aldi on the occasion of its partnership with Naturland. Both campaigns attracted nationwide attention, especially for organic association goods - and contributed significantly to making organic even more popular and something normal.

With the 360-degree campaign "Good.Better.Bioland" ("Gut.Besser.Bioland.") Lidl picks up on the added value of Bioland products, which are permanently available in all shops, under the slogan "Fresh and valuable - from our homeland". In print and online media, TV and radio spots as well as social networks, the food retailer focused on farmers and their high-quality products. In the spots, customers learn what is special about production, such as species-appropriate animal husbandry or the promotion of soil fertility as well as what advantages result from the seven Bioland principles for humans, animals and the environment. In addition, a raffle was held to win a holiday on an organic farm. The campaign massively increased awareness of Bioland.

“Gut. Besser. Bioland I Lidl“ / © Lebensmittelzeitung and “Everyone loves Bioland I Lidl” © Biopress

With “Nur Nur Natur“, Aldi launched its own organic brand based on Naturland association quality. As the organic market leader, Aldi focuses on products that are as natural as possible, combined with high demands on recipes and gentle processing. For wholemeal bread, for example, emphasis is placed on a long dough process and the use of natural sourdough instead of baker‘s yeast. Nitrite curing salts are not used in the sausage products. The milk is not homogenized, a novelty for a discounter. In addition, the sale of Naturland-certified products supports Aldi’s support programme “For more biodiversity“. The support programme provides financial assistance to farmers who implement the cultivation of more hedges, clover-grass areas and strips of old grass.

“From mother nature for you I Aldi” / © Aldi Süd and “Spelt at its most delicious I Aldi“ / © Horizont

WHAT CAN THE NETHERLANDS LEARN FROM GERMANY?

For one thing, the success of the German organic label (“Deutsches Biosiegel”), which still finds its way onto a great many products, shows how important it is for the government itself to promote organic. This was done excellently in Germany - and created the basis for retailers to anchor complementary added values in the minds of consumers with their own campaigns. In doing so, the food retailers mostly relied on their private labels.

Private labels are product identifiers with which retail companies label their products, thus acting as the owner of the brand. Accordingly, private labels have a distribution level limited to the respective trading company. Historically, they were created to circumvent the price fixing of brand manufacturers. To this end, discounters had a product manufactured under their own name and thus invented the concept of private labels. Full-range retailers followed suit with private labels. With private labels, retailers can offer a differentiated and broad range of products, which can be located in the entry-level price segment as well as in the premium segment. The aim is to offer an attractive alternative to a manufacturer’s brand and thus differentiate from competitors. Own brands are generally lower priced, which is an important reason for purchase from the customer’s point of view. In contrast to private labels, manufacturer brands are the brands of an independent manufacturing company. Their focus is on specialisation in a certain product area, which allows a very clear brand image to be built up. The manufacturer is responsible for the entire brand process in all distribution channels up to the positioning in the retail trade.

Inflation in Germany has risen since the war on Ukraine in 2022. According to the Federal Statistical Office, the average inflation rate for 2022 was 8%. This led to significant price increases for food. As a result, private households exercised purchasing restraint and changed their buying behavior. Instead of buying manufacturer's brands, they bought more private labels. This effect is called "trading down". This crisis- and war-related development led in particular to private labels increasing their market share in the organic sector. Across all product ranges, private labels recently had a market share of 43% in Germany - a record level. According to the Gesellschaft für Konsumforschung GfK (GfK Consumer Research Association), organic private labels saw a sales increase of a good 12% in 2022, while organic manufacturer brands recorded a sales decline of 6% compared to 2021.

Organic as a unique selling proposition is no longer sufficient in the highly competitive German organic market today. If you look at the successful campaigns of recent times, they consistently address other added values. Organic association quality is a good and increasingly important argument, if not a prerequisite for entry. Furthermore - especially after the start of the market partnership between Lidl and Bioland - the emotional charging of the retail brands began through co-branding with organic association labels. This led to an additional emotional charge of the private label and the communication of further added values such as regionality, gentle production methods or storytelling through the portrayal of producers, for example in the context of elaborate campaign films. A memorable brand experience and successful storytelling create brand loyalty among customers. Here are examples of possible added values:

- The Bioland campaign launched by Lidl focused in particular on the added values of preserving biodiversity and the regional origin of food. This was achieved in particular through stories about the production of the products.
- Aldi's "NurNurNatur" campaign, which was launched at the beginning of the Naturland campaign 2023, focused on the added values of gentle processing and biodiversity conservation.

In the classical organic trade, the so called "Naturkosthandel", which consists of many small players and traders, there has never been an overarching and jointly supported strategy that has highlighted the added value of 100% organic shopping. The opportunity to prominently and powerfully highlight this big plus was missed up until now.

If we look at a recent Statista survey to see what reasons prompt people to buy organic products, we find the following arguments in the top ten places:[73]

- Animal welfare (90%)
- Food that is as natural as possible (90%)
- Regional origin / support of regional farms (88%)
- Healthy nutrition (87%)
- Less additives and processing aids (85%)
- Avoidance of pesticide residues (84%)
- Social standards / fair income for producers (79%)
- Contribution to the preservation / promotion of biodiversity (74%)
- Certainty of receiving GMO-free food (74%)
- Availability of food in the usual places of purchase (71%)

With regard to the possibilities for Dutch producers and processors to contribute to these added values desired from the consumer's point of view, they can be found in particular in the areas of animal welfare, naturalness of the food, as few additives and processing aids as possible, the consistent avoidance of pesticide residues, the emphasis on high social standards and fair incomes for producers, as well as the emphasis on a measurable and easily comprehensible contribution to the preservation or promotion of biodiversity through the type of land management. This should be the starting point for quality assurance measures and concrete programmes, on which an export strategy can be developed.

[73] Statista (2023): Was sind die Gründe, die Sie dazu veranlassen, Bio-Produkte zu kaufen?, https://de.statista.com/statistik/daten/studie/2419/umfrage/bioprodukte-gruende-fuer-den-kauf/

2.2. Based on Switzerland's Promotion and Strengthening Strategies

ORGANIC FARMING TRADITION AND DEVELOPMENT IN SWITZERLAND

Organic farming and the marketing of organic products have both a long tradition in Switzerland. Since the introduction of regional support programmes for organic production at farm level at the end of the 1980s, the conversion rate has risen constantly. Four aspects are of central importance for the steadily growing development of organic farming in Switzerland: Since 1993 organic farming has been reliably promoted throughout Switzerland with overall attractive subsidy amounts. Thus, in 2022, 17% of the total agricultural area in Switzerland was farmed organically. Furthermore there are two market players dominating organic sales and competing with each other to offer attractive organic products. With Bio Suisse and their „Bio Knospe“ there is a dominant organic association with a trademark with high recognition and popularity among consumers. Finally, Switzerland is a country with high purchasing power, which means that many people are able to afford organic products.

KEY PLAYERS AND STRATEGIES IN THE ORGANIC MARKET

In the area of marketing, the entry of the Coop retail chain into organic marketing in 1993 and of Migros in 1996 was essential for organic development. Since then, these two most important organic marketers have constantly expanded their organic product ranges. Of the total sales of organic products in Switzerland in 2022 (3.87 billion Swiss francs), the following would be accounted for by Coop 1.59 billion Swiss francs and Migros 1.26 billion Swiss francs. Thus, these two players together represent about three quarters of total organic sales. In terms of marketing strategy, the Coop retail chain consistently uses its organic umbrella brand as a communication flagship, whereas Migros tends to place its organic products in the wellness and fitness sector. A third important success factor is the fact that there is only one central organic farmers association in Switzerland: Bio-Suisse with its „Bio Knospe“ is a well-established and very well-known marketing tool, which has been found at Coop since 1993 and in Migros shops since 2022. The high association standards of Bio-Suisse and the „Bio Knospe“ as a visible emblem ensure high reliability, transparency and traceability for consumers.

DIVERSE SALES CHANNELS AND MARKET SHARES

If we look at the market shares of the various sales channels in organic food sales, it becomes clear that the majority of organic food (88.3% in 2022) is demanded via the classic retail trade (especially Coop, Migros, Manor, Spar and Volg). Most recently, the discounters Aldi Suisse, Denner and Lidl Switzerland gained market share by expanding their organic product ranges, reaching a share of 6.1% in 2022. This made the discount stores the second most important sales channel for organic food. Specialist retailers (bakeries, butchers, organic shops, etc.) and direct marketing (market stalls and farm shops) tended to lose further market share and are relatively insignificant, accounting for only 5.6% of sales in 2022.

SUCCESSFUL SYMBIOSIS: POLITICS AND MARKETING IN ORGANIC DEVELOPMENT

- In conclusion, it can be said that the development of organic agriculture in Switzerland is characterised by a relatively even, continuous growth, which is evident in few other European countries. This is due, on the one hand, to the four factors mentioned at the beginning:
- · Constant and economically attractive political support on the farm level;
- · two market players dominating organic sales, competing with each other to offer attractive organic products;
- · a dominant organic association with the “Bio Knospe” as a trademark with high recognition and popularity among consumers.
- · finally, Switzerland is a country with high purchasing power, which means that many people are able to afford organic products.

3. Sources and Recommended Readings

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Europe's first eco-certified agency for strategy and communication in the field of sustainability. Our company is certified by ABCERT AG under the control number DE-ÖKO-006.

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