



Organic Products Market in German

1. Overview

In Germany the organic consumption has started since 1990. At first production, plant and trade have been done in specific and near areas. Later transportation is more convenient and especially healthy and sanitation's problems occurred with animals fed as food such as mad cow disease (BSE), contaminants, increasing residue chemical food, including bird flu. These factors make the organic products market's interest and the quantity of organic consumption increasingly. Besides German government and European Union have also promoted and supported organic farming for sustainable production and to preserving environment and to add quality in the same time. Therefore in Germany organic products became the products needed constantly and increasingly by always the markets.

2. Production

According to the year of 2008 in Germany, there are 19,824 agriculturists who produced the organic products on the land 911,385 hectares. Having compared with the early year the quantity of business and organic agricultural land increased approximately 6.0 and 5.3 respectively. The total distribution is about EU 5.800 million (about ฿ 266,800 million) or average 3.5 % of the total of all food products market. Although the value increased about 10 % but having compared with the year before the rate of extension was slow down, due to the report in 2006 to 2007 the extension about 18 and 15 % respectively. The cause of 2008 extension was slow down because the middle year vegetable and fruit products were not enough to supply the markets because of production 's problem, it was not the cause of less consumption. Therefore it made the value of extension of the markets through the year was slow down. It can be classified following types of food products and arranged the market part of organic products as follows:

Products (Percent)	dividing/general food
1. Egg	11.5
2. Tomato	8.5
3. Grain Bread	7.1
4. Vegetable	6.9
5. Fruit	6.0
6. Fresh Milk	5.6
7. Beef	2.5
8. Pork	1.0
Total	3.2





3. Import-Export

In the present quantity and value of organic products import & export do not categorize as statistic because the number of export & import products is very less. The important source of import and export market of Germany is from European countries zone especially Italy, England, French, and Spain. And from the third countries such as Brazil (coffee), New Zealand (Kiwi), Costa Rica (banana), India etc. For Thailand, Germany imported the products such as Ready to Eat and rice mainly.

From domestic products and import products, German has organic products in the market through year especially tropical fruits following as:

- There are 70 types of fresh vegetables and fruits sold in their seasonal variations.
- Milk and products from 60 producers.
- Bread, Cake, Cookie sold in the locality.
- Meat and products become more interesting after problem of mad cow disease (BSE).
- Sea food and frozen products such as vegetables, fruits, ice-creams etc.
- Other convenient food.
- Beverages, fruit juices, wine, and champagne.
- Tea and coffee.
- Agaricus Bisporus.

4. Market Channels

According to the survey of Ministry of Agriculture nutrition and Consumer Protection of Germany found that the market segment of organic products was stable. The consumers' amount of the products was not more different from the year of 2007; 17 % of customers buys usually the products, 17% of customers buys seldom the products and 29 % never buys the products.

In the present the market place for organic distribution, consumers can find in general stores because the products 'price are not different from general products except the meat product that is still higher price than about 10 to 15 %. For the market share of organic products in each store is summarized as follows:

1. General supermarket	40%
2. Discount store	32%
3. Healthy products store (Reform House)	23%
4. Organic supermarket	5%





It can be said that the rate of market share of general supermarket and discount store are increasing continuously because both of the store can sell the products cheaper than the others. Besides it is because the slowdown economic situations made most of consumers considered critically more the products' price.

5. Regulations of Production

The regulations of organic plant and animal husbandry based on the Bioland's regulation, the biggest association of Germany; there are 4,967 organic agriculturist's members on the cultivated area 243,966 hectares, and the association also followed the EU regulations as follows:

- Regulation 2092/91 (June24,1991) Organic production
- Directive 2001/18/EC Genetic modified organisms
- Regulation 837/2007 Organic production and labeling....
- Regulation 967/2008 Organic production ...
- Regulation 889/2008 Organic production ...
- Regulation 1254/2008 Organic production ...

Bioland Association consists of the following regulations:

- Planting of seedling
- Domestic animals business
- Agriproduct processing for distribution

The essences may be concluded as follows:

5.1 Seedling Planting

Vegetation genetic modification, chemicals and chemical fertilizer are prohibited. The plantings should be appropriate to the cultivated area. The preservation and taking care of the cultivated areas perfectly by using natural fertilizer, getting rid of insects and weeds not support the production are necessary. Including making the high quality of production, serious consideration to environment, how to use underground resource & water resource appropriately, safely and not affect to environment are important as well.





5.2 Animals Business

A business of animal husbandry is suitable for organic farming following mostly the natural method. The animal stall, the area raising animals, proportion, and quantity of animals should be appropriate to the area such as:

- 6 layer chickens per a square meter in a stall and 4 layer chickens stall per a square meter in an open – air.
- For other poultries, 10 to 16 of them per a square meter in a stall.
- Limited 100 kilometers Beef Cattle, the area of 1.5 square meters per one.
- Limited 350 kilometers Beef Cattle, the area of 4 square meters per one.
- Dairy cattle, the area of 6 square meters per one.
- Swine, the area of 7.5 square meters per one
- Rabbit, the area of 0.3 to 0.8 square meter pre one.

5.3 Agri-product processing for Distribution

1) The main objectives are to make highest value of food and as the natural taste, raw materials used in the production will authorize according to the regulation of the association, to use compound and mixture will base on the EU 2092/91 regulation and material packaging should be the recycle type and the container not affect to environment too much.

2) Label sticking the products must be clear and the font size mentioned in Food law of Germany such as:

Content	Height
5-50 grams	2 millimeters
50-200 grams	3 millimeters
200-1,000 grams	4 millimeters
Over 1.000 grams	6 millimeters

5.4 Inspection

In Bio Association, officers will investigate and check the correct cultivated areas as well as other involvements. The branches of the association settled in different cities in Germany. Entrepreneurs have to follow strictly the regulations of the association. Any changes, entrepreneurs have to inform to the Association in order to investigate them for appropriation and correction. Besides entrepreneurs have to do the accounting, working record, problems and solutions of the production to get ready always for showing when having investigated by the association.





6.5 Logo

Bio products of each company have their own label and brand. In the same time, when they follow the correct production regulations of the association they can stick additionally the official trade mark along with their own symbols.



6. Consumers are more interested to their health and pay more attention the products safety, sources, the production process, and including being more careful the genetic modification products. According to logistics system, transportation of the products is convenient and faster than as ever so it helps the organic products imported from countries over the world to supply German market. In the present there are thousands of organic products sell in the shops over Germany including Thai organic products mostly selling Asian grocery's shops. Recently organic products market values EU 5,800 million or 5.3 % of food market value. Although it is a very less value but has a chance for more extending especially German market is regarded as one of World important organic markets.

7. List of important Associations' Addresses

7.1 Bioland Bundesverband

Kaiserstr. 18
55116 Mainz
Tel. +49 (0) 6131-239790
Fax. +49 (0) 6131 – 2397927
Website: www.bioland.de

7.2 Demeter

Brandschneise 2
64295 Darmstadt
Tel. +49 (0) 6155 – 8469 55
Fax. +49 (0) 6155 – 8469 11
Website: www.demeter.de

7.3 Naturlande.V.

Kleinhanderner Weg 1
Tel. +49 (0) 89– 8980 820
Fax. +49 (0) 89 – 8082-90
Website: www.naturland.de





7.4 Bundesverband Naturkost Naturwaren
Herstellung und Handel eV (BNN)
(Organic Processors and Traders Association)

Albrechtstr. 22

D-10117 Berlin

Tel. +49 (0) 30- 847 122 444

Fax. +49 (0) 30 - 847 122 440

E-Mail: kontakt@n-bnn.de

Website: www.n-bnn.de

7.5 Bund Oekologische Lebensmittelwirtschaft

Marienstrasse 19-20

10117 Berlin

E-Mail info@boelw.de

Website: www.boelw.de

7.6 Bundesfachverband der Reformhauser

Ernst-Litfass-Strabe 16

19246 Zarrentin

Teln: +49 (0) 38851 - 51 110

Fax: +49 (0) 38851 - 51 299

Website: www.refo.de

E-Mail: Kontakt@refo.de

7.7 GAA e.V.

ArndtstraBe 11

D-01099 Dresden

Tel: +49 (0) 351 - 401 2389

Fax: +49 (0) 351 - 401 5519

Website: www.gaen.de

7.8 Alnatura

Darmstadterstr. 3

27572 Bremerhaven

Tel. +49 (0) 471 -9736125

Fax. +49 (0) 471 - 74349

Website: www.frosta.de

7.9 Frosta AG

Am Lunedeich 116\27572 Bremerhaven

Tel: +49 (0) 471 - 9736125

Fax: +49 (0) 471 - 74349

Website: www.frosta.de





8. Links of Concerning Information

- http://ec.europa.eu/agriculture/organic/home_en (Organic Products of European Union)
- www.oekolandbau.de (for consumers, producers and product processing)
- www.ifoam.de (The main Association of Bio Products)
- www.soel.de (Information for Plating)
- www.fibl.de (Bio Research Institution)

9. Attached documents

9.1 List of Customers/Import

9.2 Five Copies of European Union Regulations about Organic Products

9.3 The Regulations about Organic Production.

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