

# Organic Monitor

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## The Global Market for Organic Food & Drink

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by

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# Company History



- 2001 Company formation
- 2001 Launch market research reports
- 2002 Broaden focus to related industries
- 2003 Geographical coverage widens
- 2006 Expand business services portfolio
- 2007 Launch industry summits

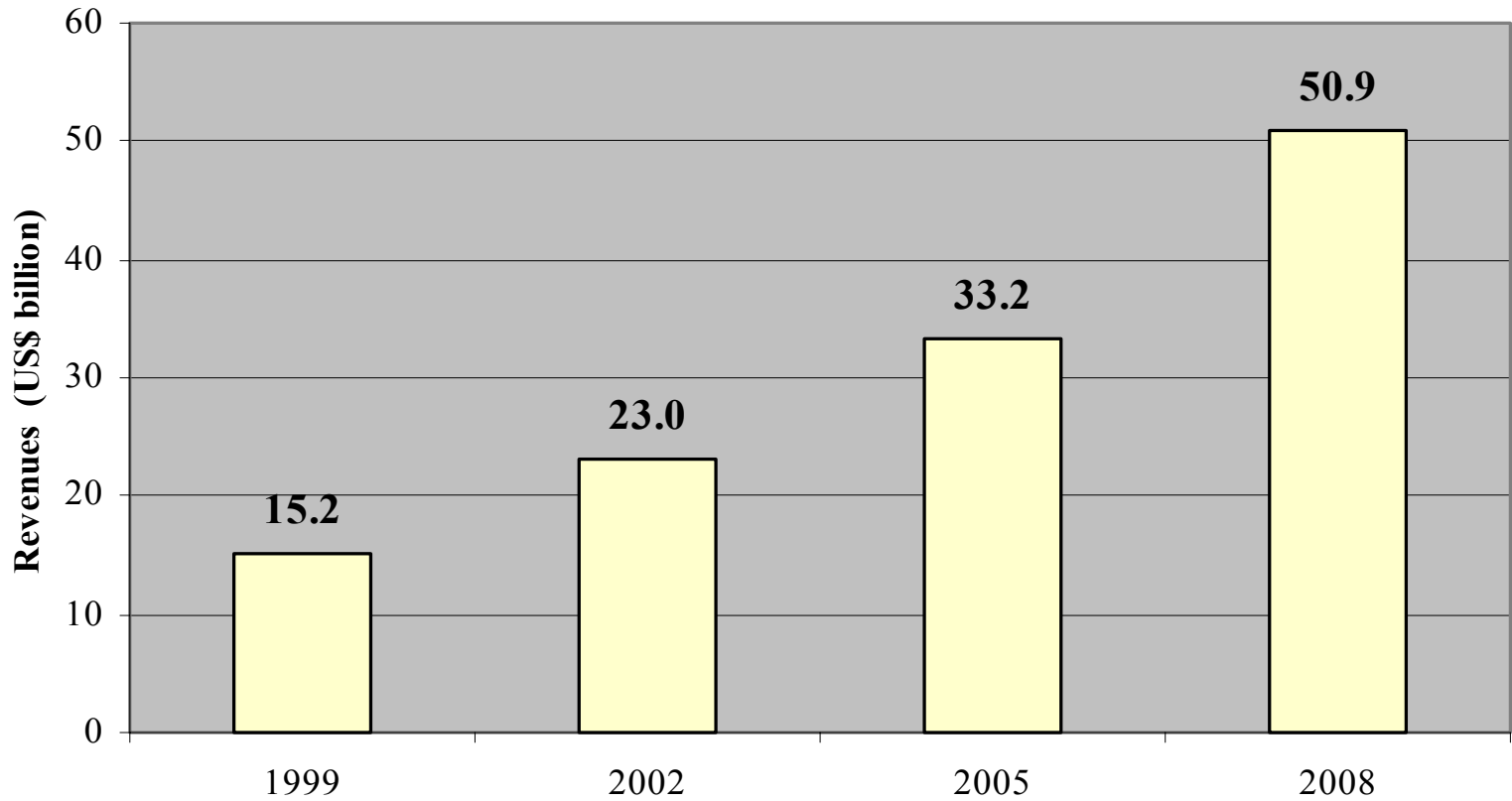
[www.organicmonitor.com](http://www.organicmonitor.com)

# Global Market



- Market Size (2008) US \$50.9 billion
- Market Growth 235% (1999)
- Leading Regions Europe  
North America
- Leading Markets USA, Germany  
UK, France

# Market Growth Rates



# Europe

**Market Size**

**US \$26 billion**

**Largest Market**

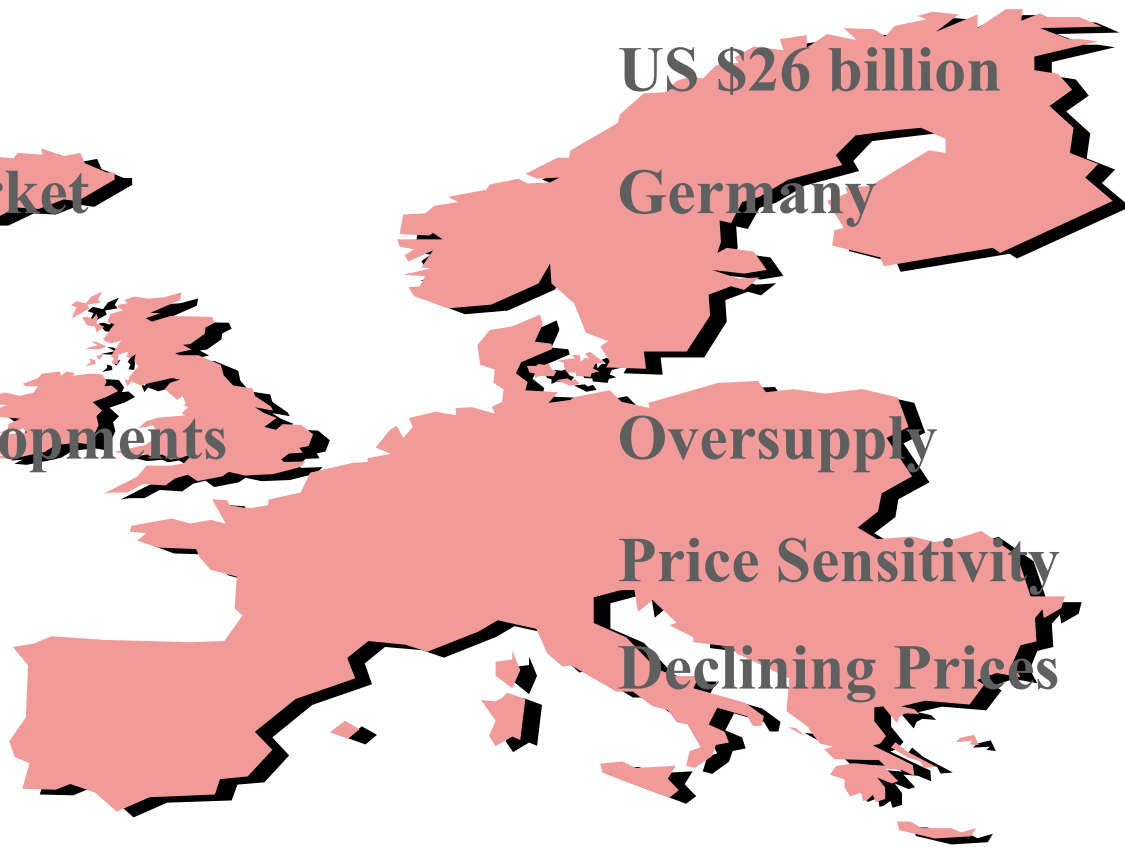
**Germany**

**Latest Developments**

**Oversupply**

**Price Sensitivity**

**Declining Prices**



# North America

**Market Size**

**US \$23 billion**

**Largest Market**

**United States**

**Trends**

**Private Labels**

**Consolidation**

**Declining Prices**

# Asia

**Market Size**

**US \$0.95 billion**

**Largest Market**

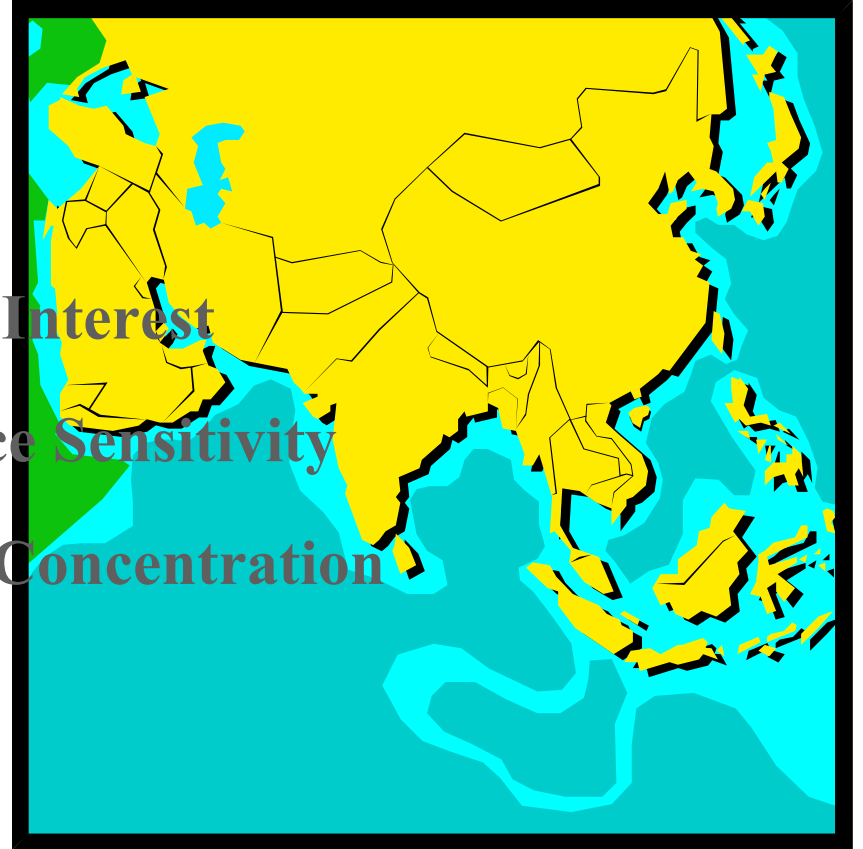
**Japan**

**Trends**

**Growing Interest**

**High Price Sensitivity**

**Demand Concentration**



# Growth Outlook

Global economy projected to expand by 3.9% in 2010 (IMF)

1. Market growth rates recover
2. Overproduction
3. Product prices stabilise
4. Industry consolidation
5. Consumers becoming increasingly sophisticated...



# Growing Consumer Sophistication

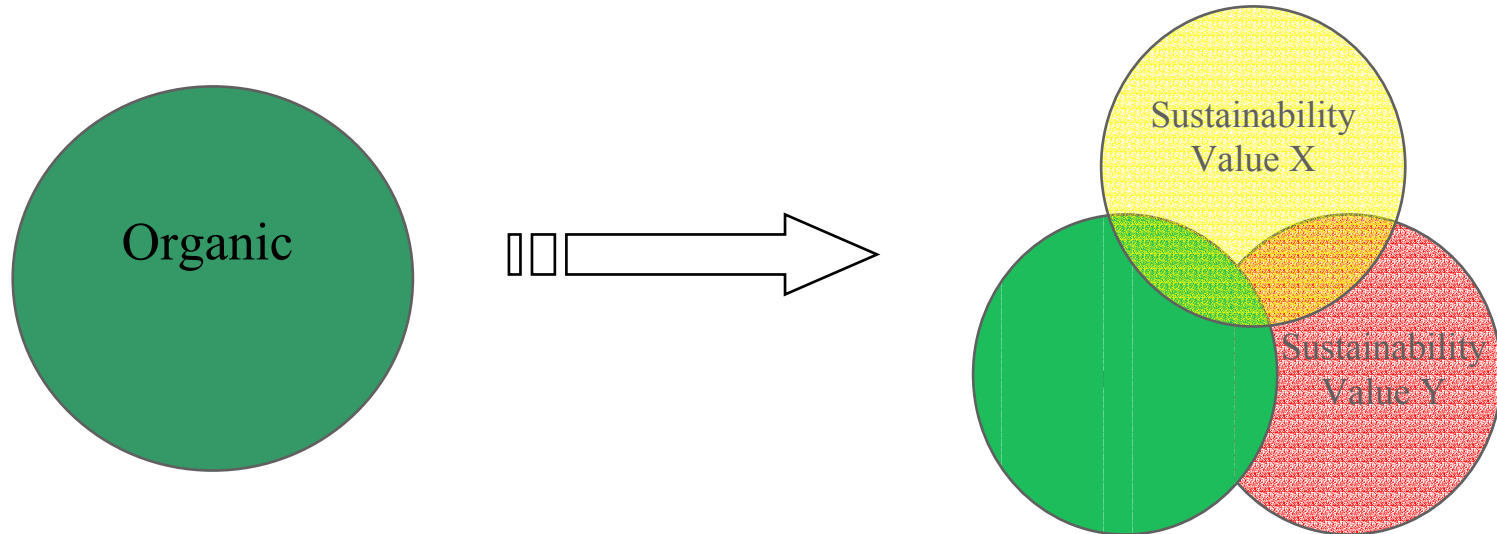
- Growing concern about the environment
- Rising demand for chemically-clean products
- Growing scrutiny of product origins
- Increasing regionalism / buy local
- Questions about carbon footprint of products

Impact: Companies need to respond to rising consumer expectations



# Future Outlook: Product Marketing

Companies need to go beyond 'organic' as consumers become more sophisticated and market matures.



What sustainable values?

# Organic Plus Strategies

Products marketed on sustainable values...



# Standards Evolution

Organic standards are responding to market changes by encompassing sustainable values...



## Thank You

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