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MADRID OCT. 23rd, 2019

WHICH FUTURE FOR ORGANIC MARKETS & STRATEGIES OF OTHER VALUE CHAINS

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1 - Which strategies to satisfy the diverse “flexitarians” and the emerging demand globally

- Worldwide opportunities of growing organic demand

By **Pierre Escodo**, EUROFRESH DISTRIBUTION editor.

- New EU regulation & global approach on the regulatory frameworks, which new constraints & opportunities

By **Michel Reynaud**, ECOCERT Vice-President & EOCC chairman.

- Which strategies to satisfy the diverse European “flexitarians” and the emerging demand globally,

by **Tea Thaning**, EUROMONITOR INTERNATIONAL senior food analyst.

2 - Specialized retail chains and discounters competing on the organic wave

- The revolution of the specialized distributors for organic food,

By **David Siffert** (BIOCOOP head of F&V division)

- The new strategy of the discount chains to seduce consumers,

By **Daniel Cruz**, REWE GROUP sourcing manager at CAMPIÑA VERDE

PENNY.

campiñaverde
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3 - Which better added "value-chains" beyond organics

By **Miguel de Porras** FIBL EUROPE director, latest comparative research on quality standards

By **Eduardo Tilatti**, DEMETER INTERNATIONAL director

By **Anton Carra**, BRIO SPA (ALEGRA GROUP) sales director

By **Stefanie de Kool** PLANET PROOF program manager for F&V

By **Bruno Vila** COLLECTIF NOUVEAUX CHAMPS (0 residue) chairman

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Global passion for ORGANICS

- Organic food & drink now an **€92 billion** global market value (US €43)
- But can supply keep pace with **America & Europe**’s appetite for ever more organic produce?
- Demand poised to **surpass production**
- **Higher market shares** for organic veggies and expected increases with the supply of organic fruit

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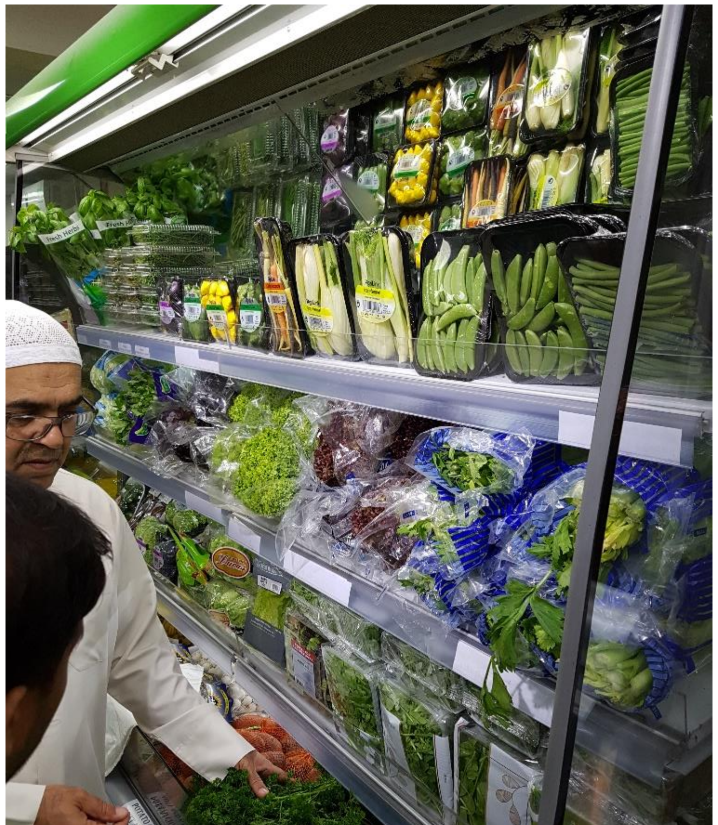
WORLD markets by 2023 SLOWING down

Source : Technavio.com

MIDDLE EAST retail Mutation with organics:

- Like FRESCO Azerbaijan, SPINNEYS Dubai.
- 1 to 10% **Organic sales** of fresh produce at UAE retail chains strategies.



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RUSSIA turning « Green »:

- **Gyper Globus** hypermarkets: bio-vegan line, 750 certified items, 50% are Russian
- ***Globus Vita,*** farmers' products & 40 organic ref.
- **Vkusvill supermarket**: *green line* brand for healthy food
- **Azbuka Vkusa** premium supermarkets: to-go healthy snacks (packed berries ..)

Organic & more: what else to SEDUCE consumers?

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Which FONDAMENTAL values matter for consumer?

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China & Russia : THE TRUTH 98% need more transparency regarding food products (KANTAR Panel)

US : ECOLOGY 85% find important to protect environment and avoid waste

TASTE is important 59% for **European** countries

France more ECOLOGIC : 94% find important to reduce food waste.

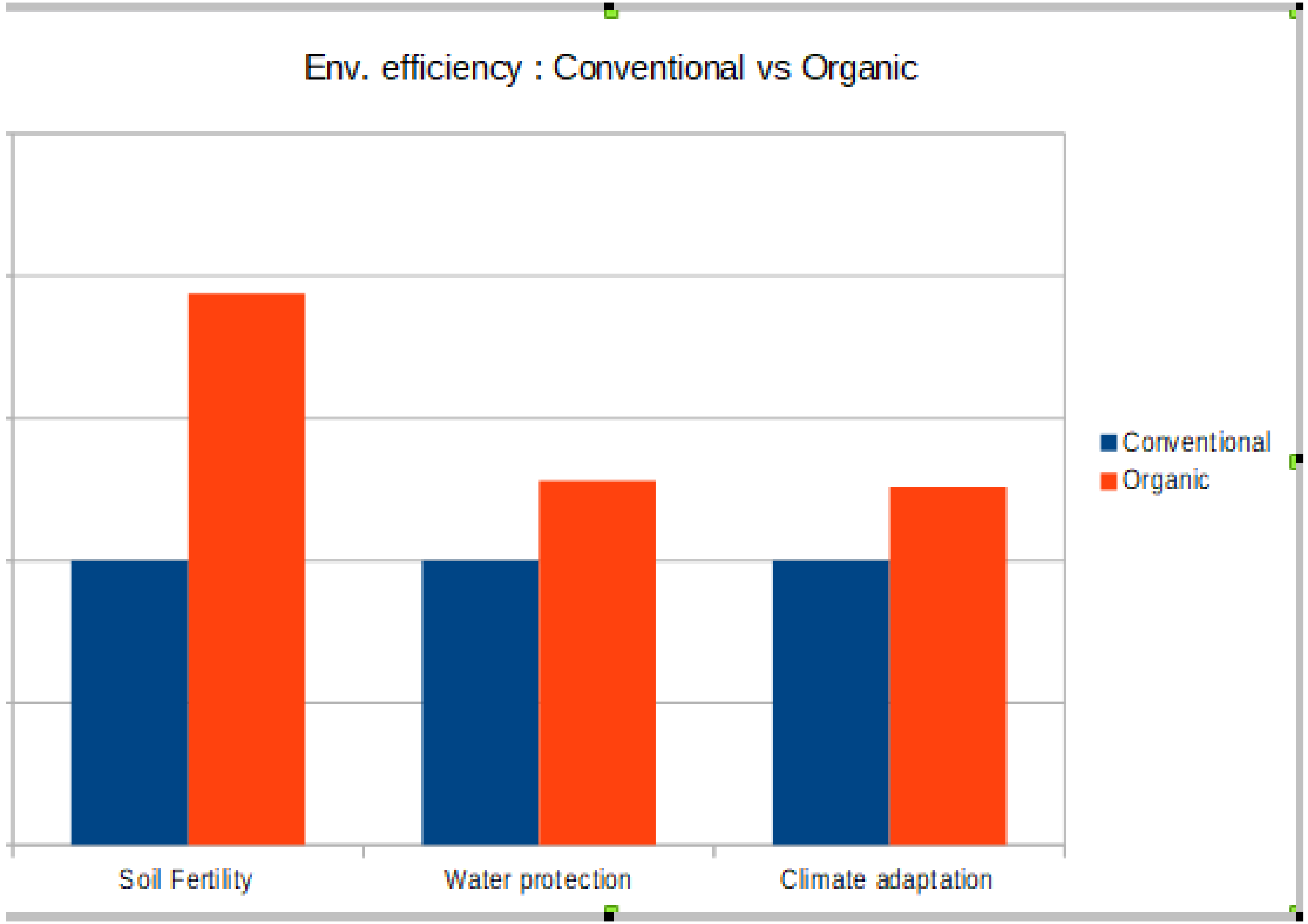
Germany : TRUTH AND ECOLOGY 91% need more transparency regarding food products

Middle East : TRUTH 92% need more transparency regarding food products

ORGANIC : environmental efficiency?

Last Thünen report shows that organic crop is a sustainable land use system with:

- water protection
- soil fertility
- biodiversity
- climate protection
- climate adaptation
- resource efficiency
- animal welfare.



Organic & more: away from PLASTIC

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LOCAL & OVERSEAS growing values with Organics

- Carrefour example **labelling** local suppliers **within 40 km** range.
- Fair Trade practices, payment **within 30 days**
- Benefits are a **wider choice**,
- **better-tasting** preference.

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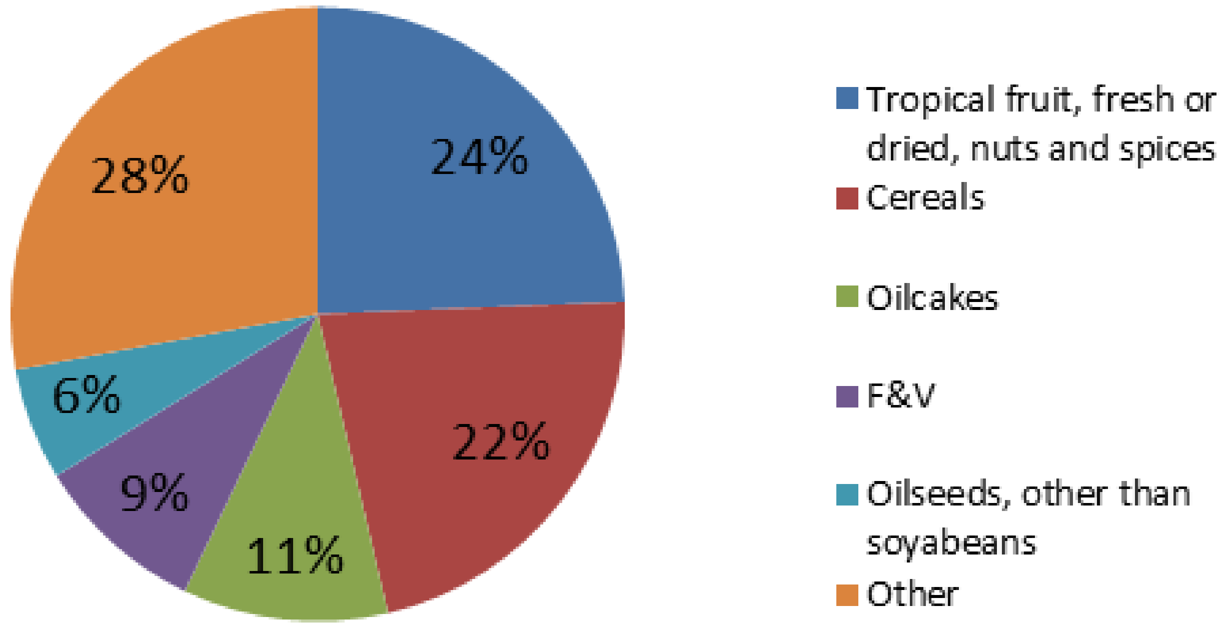
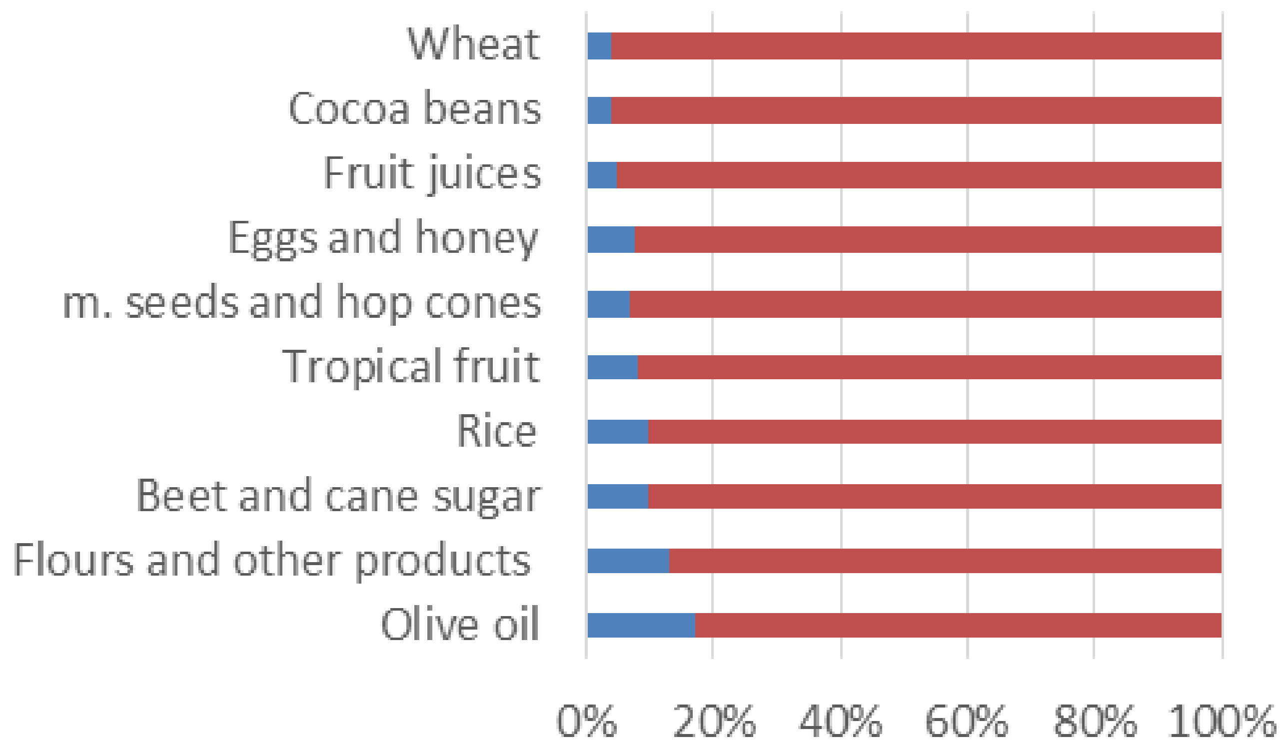
EU organic imports, 33% are F&V



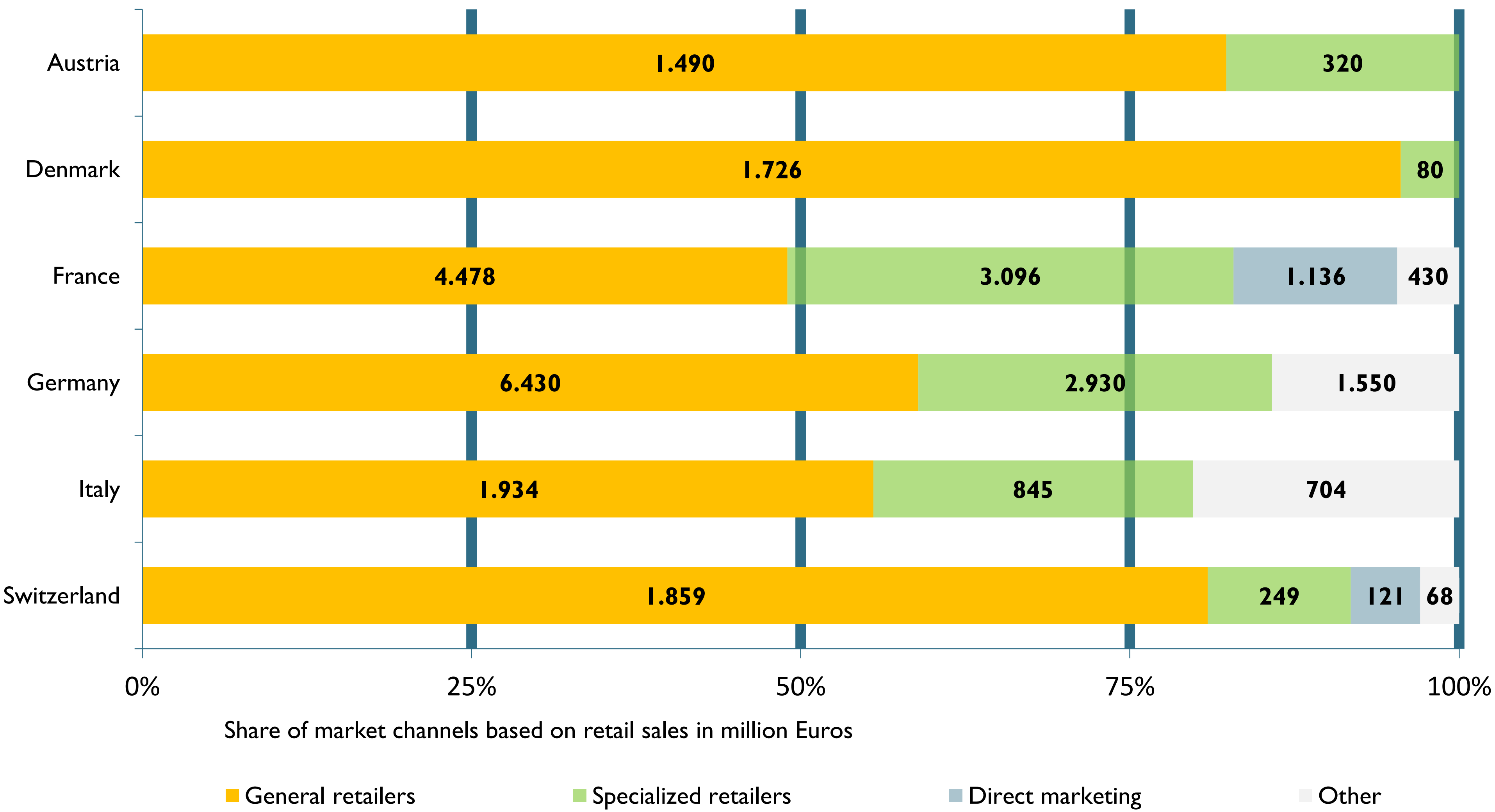


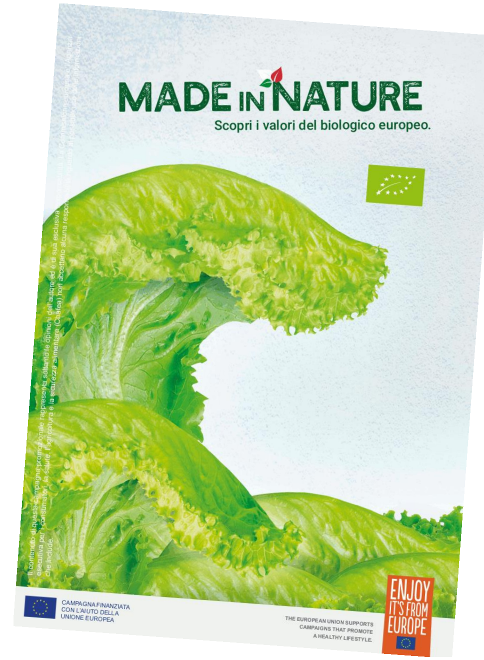
EU organic distribution channels

MADE IN NATURE

Organic retail sales by channel 2018

Compiled by FiBL und AMI based on national data sources





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THANK YOU !

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