

PROGRAM

18.15

DEBATE ON THE DEMAND FOR MORE “VALUE-ADDED” BEYOND ORGANICS: LIKE CONVENIENCE, FAIR TRADE, BIODYNAMICS, LOCAL, CARBON NEUTRAL, ZERO RESIDUE, VEGANS, FLEXITARIANS, GLUTEN-FREE, NON-GMO, HALAL ...



Eosta sales manager, **Jeroen Plesman**



Kernel Export Chairman & Proexport board member, **Jose Antonio Cánovas**



Naturland CEO, **Steffen Reese**

18.45

CLOSURE & COCKTAIL



With EUROFRESH DISTRIBUTION celebration of its 20 years anniversary



WELCOME TO NATURLAND

Naturland –
Association for Organic Agriculture

1. About Naturland
2. Our responsibility for the change
3. Go organic
4. Added value
5. Statistics

Steffen Reese
Naturland



About NATURLAND



Non-profit Association
for the Promotion of Organic Agriculture
worldwide

- Headquartered in Gräfelfing, Munich, Germany
- Founded in 1982 by a group of 10 people from different backgrounds (farmers, scientists and critical consumers)
- Naturland farmers and processors have been ground-breaking global pioneers for more than 35 years
- Started with one organic producer standard → today a range of different standards covering the whole product line
- Today: One of the largest international organic associations with 54.000 farmers and 800 processors in 52 countries



About NATURLAND



members /growers

provincial and states
boards (= growers)

assembly of delegates
(= growers)

board of directors
(= growers)

employees
(grow paper on their desks)

international advisory
board (=growers)

arbeiten rund
her nach den Natur-
halb Deutschlands sind
die meisten davon in rund **120 Kleinbauern-
Kooperativen** oder Erzeugergemeinschaften
zusammengeschlossen. Weltweit steht eine
Fläche von knapp **400.000 Hektar** unter
ökologischer Bewirtschaftung nach Naturland
Richtlinien.

4 000 growers
in Germany

50 000 growers
worldwide in 52 countries

Ägypten	49	Frankreich	49	Nicaragua	97	Slowenien	2
Argentinien	1	Griechenland	147	Niederlande	12	Spanien	90
Äthiopien	6.939	Honduras	518	Österreich	374	Sri Lanka	4.850
Bangladesch	2.350	Indien	7.850	Palästina	69	Südafrika	127
Bolivien	1.161	Indonesien	25	Papua-Neuguinea	2.613	Taiwan	1
Brasilien	411	Irland	7	Paraguay	1.180	Tansania	825
China	61	Italien	100	Peru	3.597	Thailand	1.651
Costa Rica	1	Kanada	4	Philippinen	3.980	Türkel	62
Dänemark	3	Kasachstan	1	Polen	47	Uganda	2.739
Deutschland	3.448	Kroatien	1	Portugal	1	Ukraine	3
Dom. Republik	1.667	Madagaskar	1.982	Rumänien	28	Ungarn	1
Equador	306	Mexiko	3.546	Senegal	83	Vietnam	1.394
Elfenbeinküste	72	Moldavien	258	Serbien	189	Zypern	30

Our responsibility for the change



17 Goals to Transform Our World

The [Sustainable Development Goals](#) are a call for action by all countries – poor, rich and middle-income – to promote prosperity while protecting the planet. They recognize that ending poverty must go hand-in-hand with strategies that build economic growth and addresses a range of social needs including education, health, social protection, and job opportunities, while tackling climate change and environmental protection.

Sustainable Development Goals



Our responsibility for the change



Figure 1: Nature, Vol, 461, 24 September 2009

Our responsibility for the change



Auswirkungen des Booms

26. November 2016 19:13 Uhr

Das Märchen vom guten Bio-Essen

Über Biolebensmittel gibt es viele Illusionen: Gesünder, besser für die Umwelt, von Höfen aus der Heimat, mit glücklichen Tieren. Die Wahrheit sieht anders aus.

Von Kristina Läscher



Drucken



Bio-Lebensmittel boomen - aber wie werden sie hergestellt.
©Jonas Wresch

Almería, Spanien. Für einen Überblick hat Marcos Diéguez diese Anhöhe empfohlen. Eine Straße schlängelt sich vom Küstendorf San José hinauf auf einen Berg im Naturpark Cabo de Gata. Oben fegt ein warmer Ostwind, der Levante, über das Land. In der Hitze ducken sich Grasbüschel und Agaven, in den Stacheln wehen Plastikfetzen. Von hier gleitet der Blick über die Ebene: Gewächshäuser, fast überall, mehr als 40.000 sollen es sein. Die Spanier nennen diesen Landschaftshorror Mar de plástico – Plastikmeer.

ABO SHOP AKADEMIE JOBS MEHR ▾

E-PAPER AUDIO APPS ARCHIV ANMI

ZEIT ONLINE

Suche

Politik Gesellschaft **Wirtschaft** Kultur ▾ Wissen Digital Campus ▾ Arbeit Entdecken Sport ZEITmagazin mehr ▾

Bioskandal

Melonen ernten bei 45 Grad

Der wahre Preis von Biogemüse: Die Realität auf einer spanischen Ökofarm widerspricht dem PR-Bild von Mensch und Natur.

Von **Raphael Thelen**

24. Juli 2014, 8:00 Uhr / Editiert am 7. August 2014, 4:49 Uhr / DIE ZEIT
Nr. 31/2014

AUS DER
ZEIT NR. 31/2014



INHALT

Seite 1 — Melonen ernten bei 45 Grad

Seite 2 — "Alles, was ich will, ist arbeiten und ein bisschen Respekt"

Auf einer Seite lesen ▾

Oussama Assaf, Arbeiter bei Cuevas Bio, steht auf einem Feld und schneidet Biogemüse, das unter anderem in der deutschen Biosupermarktkette denn's verkauft wird. Deren Kunden dürften allerdings wenig Ahnung davon haben, unter welchen Bedingungen Oussama Assaf seine Arbeit tut.

Go organic



Private standards of producer associations are imposing requirements evidently higher.
Private logos add value in terms of quality and confidence.

Added value



7.2 The use of water in areas with scarce water resources

Farms in areas with scarce water resources¹⁶ must comply with additional requirements.

7.2.1 General

Water abstraction must comply with national and regional laws and regulations.

Every opportunity to collect, store and use (rain-)water must be exploited, depending on local conditions and the farm's situation.

Only efficient, water-saving irrigation systems may be used (e.g. drip, centre pivot or mini sprinkler irrigation systems).¹⁷ Water losses must be avoided by means of regular maintenance. Maintenance plans and records of maintenance must be presented.

Water consumption (m³/ha/a) is to be recorded (using a water metre). Relevant categories of users are to be identified at the regional level; co-operation should be sought with them in order to make progress in the sustainable use of water resources at both farm and regional levels (e.g. in water catchment areas).

7.2.2 Water management plan

Farms draw up a water management plan¹⁸, which comprises records and analysis of consumption, analysis of possible risks in conjunction with water use and a plan of action for the reduction or prevention of these risks.

The water management plan is to be presented before first certification and to be kept continually up to date and analysed by the farm and by Naturland. The categories of water users are to be identified in the water management plan, with details of their willingness to co-operate as well as optimisation measures planned or implemented.

Part B; II. Livestock production

II. Livestock production

As far as the present Naturland standards do not lay down any further requirements the guidelines of regulations (EC) No 834/2007 and 889/2008 are valid as a minimum standard.

1. Animal husbandry

1.1 General requirements

The husbandry conditions must enable the animal to behave in a way natural to the species: movement, resting, feeding, social and reproduction habits as well as all other behavioural traits of the particular species. Open cow-sheds and pens meet these requirements to a greater extent than closed ones. There has to be sufficient bedding for all the animals, where straw or comparable material (e.g. wood shavings, cut hay, spelt glumes) have to be used. As far as it is available, loose litter materials (e.g. straw, wood shavings) or from areas of a low cultivation intensity must be used; the farm's own organically produced manure must be used, where available, before bedding material from other sources can be permitted.

8. Transport to the slaughterhouse

Wherever possible, slaughtering pregnant animals must be avoided. Animals must not be slaughtered which has reached half its term of pregnancy or beyond. The decision is made upon application and on the advice of a veterinary surgeon.

All appointed agents responsible for the transport⁴¹ are required to be able to produce a valid certificate of competence⁴².

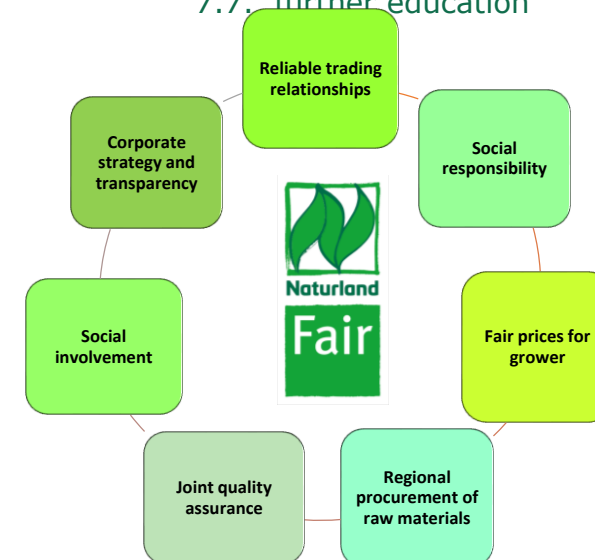
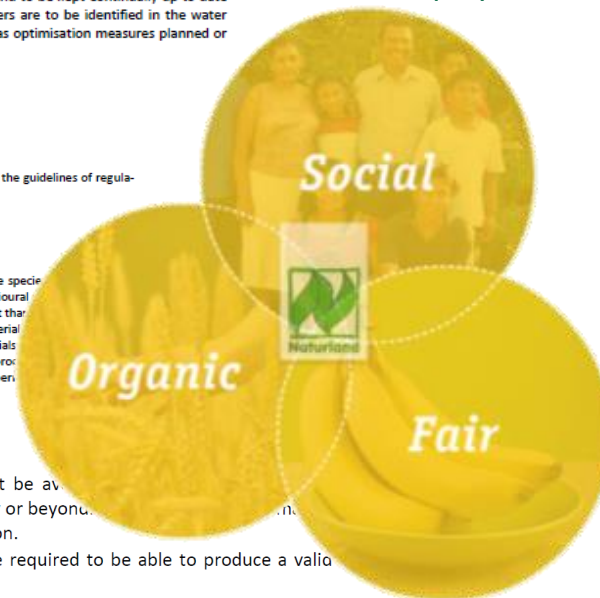
The customer of the transport is responsible for ensuring

- that the carrier⁴³ is able to produce a declaration of commitment to compliance with the Naturland standards on the transport of animals destined for slaughter. The declaration can be downloaded from the Naturland website (www.naturland.de).

Social Responsibility already part of organic certification

1. Human rights
2. Freedom to accept or reject employment
3. Freedom of association, access to trade unions
4. Equal treatment and opportunities
5. Children's rights
6. Health and safety
7. Employment conditions

- 7.1. contracts
- 7.2. equal treatment
- 7.3. wages
- 7.4. payments for board and lodge
- 7.5. working hours
- 7.6. social benefits
- 7.7. further education



Added value



WEIL BIO NICHT GLEICH BIO IST.

Für mehr Tierwohl und Klimaschutz übertreffen REWE Bio und Naturland die Vorgaben der EU-Öko-Verordnung.

+ 100% Bio-Höfe
Laut EU-Öko-VO: Teilumstellung mit konventioneller Tierhaltung erlaubt

+ Tierwohl-Kontrolle
Laut EU-Öko-VO: Bio-Produktionsbedingungen, aber keine spezielle Tierwohl-Kontrolle

Max. 10 Tiere pro Hektar Nutzfläche
Laut EU-Öko-VO: Bis zu 14 Tiere pro Hektar Nutzfläche

REWE Bio
SCHINKENWURST
70g
SCHWEIN
1,29 €
70g-Packung (100 g ± 1,85 €)

REWE DE/BIO
Unser Unternehmen ist Bio-zertifiziert durch DE-ÖKO-005.

REWE DEIN MARKT

mind. Fett **3,8%**

traditionell hergestellt

Berchtesgadener Land

Frische BIO ALPENMILCH

Bio-Alpenmilch - Herkunft, die man schmeckt

- ✓ ausschließlich von ökologisch wirtschaftenden Naturland Höfen der Alpenregion
- ✓ artgerechte Tierhaltung und natürliche Fütterung der Kühe sind dabei die Grundlage für beste Milch
- ✓ so schützen wir die Umwelt und erhalten sie als Lebensgrundlage für Mensch und Tier

Naturland Fair garantiert Ihnen eine geprüfte faire Zusammenarbeit der Molkerei Berchtesgadener Land mit Erzeugern, Mitarbeitern und Lieferanten!

Wertvolle Bio-Alpenmilch - umweltfreundlich verpackt -

Nachhaltig verpackt
Diese Verpackung besteht zu rund 90% aus nachwachsenden Rohstoffen.
FSC®-zertifiziertes Holz und eine pflanzenbasierte Beschichtung aus Zuckerrohr bilden die Bestandteile. So werden endliche Ressourcen geschont und die CO₂-Belastung wird gesenkt.

Mitmachen und umweltbewusst wählen!
Mehr zur nachhaltigen Verpackung unter:
www.bio-alpenmilch.de/NachhaltigeVerpackung

MIX Karton
FSC® C014047

SCHÜTZT Tetra Pak®

mind. Fett **3,8%**

Naturland Fair

4 101530 008156

regional . sozial . global

Unser SpeiseGut Apfel-Mango-Saft wird aus Naturland-Äpfeln und Naturland Fair zertifiziertem Mangomark gewonnen.

In Handarbeit werden die Äpfel gelesen und in der Mosterei Ketzür gepresst. Die Säfte werden schonend bei max. 75°C pasteurisiert und schonend abgefüllt.

Das Mangomark wird von einer kleinbäuerlichen Kooperative aus Indien bezogen. Mit dem Kauf jeder Flasche faires Apfel-Mango-Saftes unterstützen Sie uns in unserem regional . sozial . global Projekt.

Mit jeder Verkauften Flasche gehen 1,50€ nach Indien um die sozialen Lebensbedingungen der indischen Bauernfamilien zu stärken und zu fördern.

Naturland Fair

Mindestens haltbar bis:

Chargen-Nr.:

Statistics: development of organic turnover in € in Germany

total turnover on organic food consumption in Germany 2017			
total turnover in Euro 2017		10,04 bn €	additional turnover 5,9 %
natural food stores	29,90%	2,91 bn €	additional turnover 2,2 %
retailers	59,10%	5,93 bn €	additional turnover 8,8 %
other	11,90%	1,20 bn €	
Quelle: BÖLW, Branchenbilanz (14.02.2018)			



Statistics: development of organic – turnover in € in Germany



organic food according to retailers in Germany turnover in % of conventional

Edeka EH	1,17 bn €	4,00%
REWE	984 mio €	4,20%
Tegut	285 mio €	23,10%
Kaufland	429 mio €	2,50%
Real	148 mio €	1,90%
Aldi Nord	581 mio €	4,20%
Aldi Süd	818 mio €	5,00%
Lidl	380 mio €	1,90%
Netto	361 mio €	2,20%
Penny	207 mio €	2,30%

GfK bio Study 2017 (January 2018)



organic supermarkets 2017 turnover # shops

Denn's bio (Dennree)	333 Mio. €	250
Alnatura	423 Mio. €	132
BioCompany	157 Mio. €	54
Basic	135 Mio. €	32

handelsdaten.de (02.07.2018)







Eosta moves to sustainable new main office

31 August 2018



Sustainability Flower

The sustainability flower was developed in 2009 by an international group of prominent pioneers and innovators of the organic movement, operating under the umbrella of the "Belbis Desert Club". Among them are the founders and leaders of Eosta, Sekem, Alnatura, Lebensbaum, Rapunzel, Fibl, IFOAM, Soil & More, the Soil Association and others. They were looking to unite ecological and social values in a single elegant model. For each aspect of the flower, performance indicators were defined on the basis of the GRI Guidelines.

The Sustainability Flower serves as the main evaluation and communication tool in the Nature & More system.

See also: www.natureandmore.com

SHARE     

> Nature & More

> Sustainability Flower



AN INITIATIVE OF
eosta

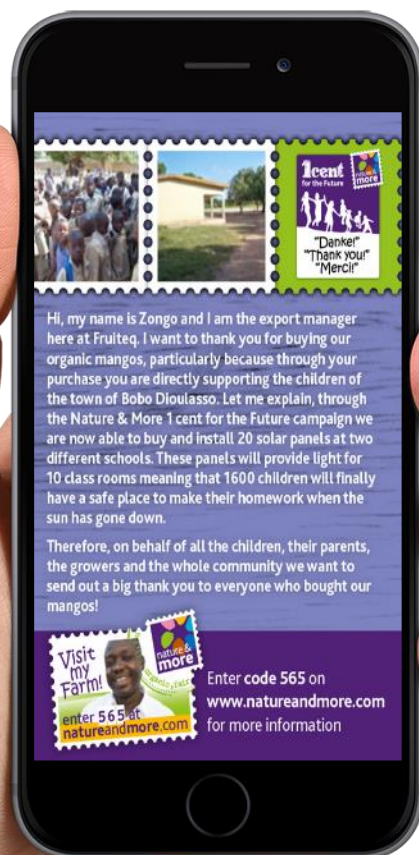


A Quick Assessment protocol was developed by the Soil & More Foundation, as a fast, quantitative and practical tool to evaluate sustainable achievements along nine separate ecological and social dimensions. Companies that want to make use of the model are [invited](#)

FAIR: “1 cent for the future”



AN INITIATIVE OF
eosta



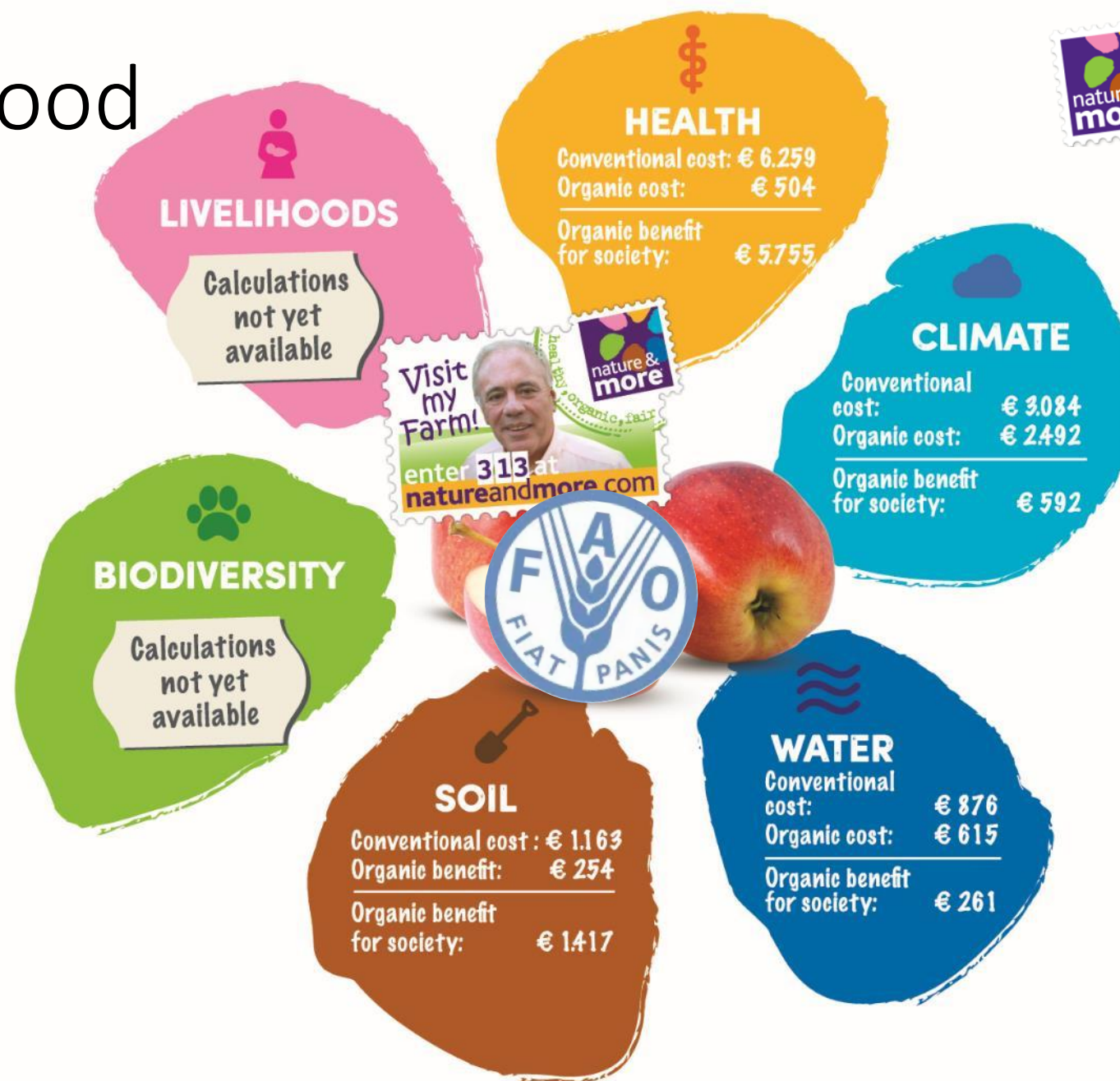
Through the “1 cent for the future – Thank You” campaigns, Nature & More growers are promoting and supporting long-term educational and welfare projects on and around the farms. At least one Eurocent for each kilogram of the “campaign fruit” sold goes to the selected projects.



True cost of food



AN INITIATIVE OF
eosta



Organic isn't too expensive..



AN INITIATIVE OF
eosta



AN INITIATIVE OF

eosta



AN INITIATIVE OF

eosta



DR. GOODFOOD'S

FIX YOURSELF WITH FOOD

The Dutch physician Anna Kruyswijk shows you how to improve your health with food. Let's cook!

Biodynamic (Demeter)

Biodynamic agriculture often surpasses organic agriculture when it comes to quality and sustainability. More information about biodynamic farming can be found [here](#).

Eosta has a wide range of biodynamic (Demeter) products that includes overseas and regional fruits, greenhouse crops and field vegetables. The range includes [mango's](#), [citrus fruits](#), [apples](#) and [pears](#), [parsnip](#), [Jerusalem artichoke](#) and [multicoloured carrots](#), and [bell peppers](#), [cucumber](#), [paksoi](#) and [tomatoes](#).

- > Wild Wonders
- > Taste Wonders
- > Tropical wonders
- > Biodynamic (Demeter)
- > Packaging
- > Logistics
- > Certification and QC

proexport

Hortalizas y Frutas de Murcia, España

Región de Murcia

Aquí
hay
Calidad

10 years fruit
attraction
INTERNATIONAL TRADE SHOW FOR THE FRUIT AND VEGETABLE INDUSTRY

Región
de Murcia

Stand 7D02

Hall 7

Region of Murcia

Flavour
is
Here



proexport

Vegetables and Fruits from Murcia, Spain



www.proexport.es



Production Force

- Three main areas: Export & Whole head production / Organic Production / Salads Factory
- More than 25,000 tones of Production
- Business Volume of more than 40 mill € in Sales and more than 25 mill. € in Production
- More than 37,000 m² of Warehouses



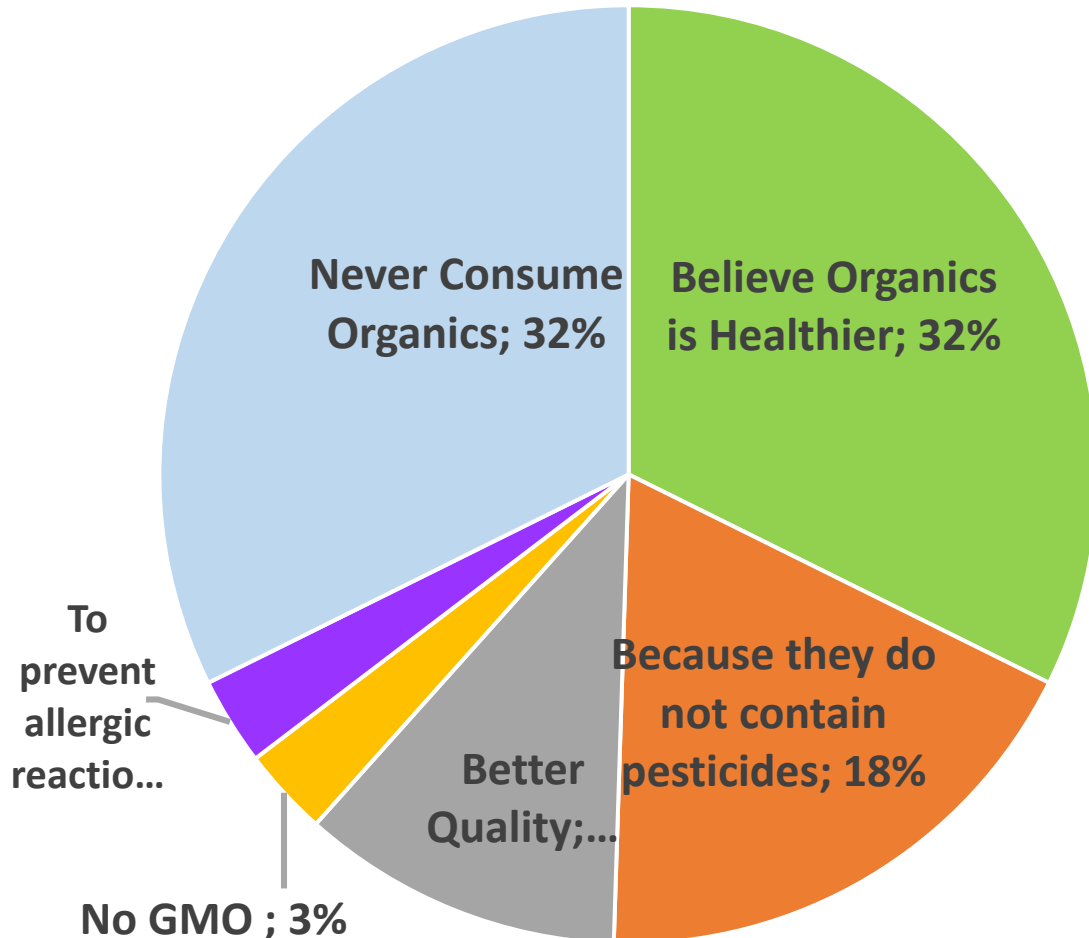
KERNEL EXPORT

Production & Export of Fruit & Vegetables

Producers Organization (P.O) with 11 partners who strive to produce high quality vegetables and melons. We grow **over 1500 Ha. of conventional crops & more than 450 Ha. of Organic Crops**. We focus on our customer needs, producing **more than 52 different products** and Employing 250-300 field operators & **over 200 packhouse operators from 19 different nationalities**.

Consumer Trends

Demand for Organics has grown over the last decade due to increased awareness and quality orientation. Annual growth in the European market is between 5-10% and more.



Mixed purchasing patterns

Consumers expect many benefits from organics but are often inconsistent in their behavior: they purchase high quality organic as well as low price conventional.



Quality Orientated & Price-Conscious

Consumers are nowadays both quality orientated and price conscious. The quality expectations is due to higher levels of education & never ending food scandals.



Spanish Consumer Trends

In Spain studies show that 30% of organic consumers are Millennials. They have more awareness towards buying habits & as new parents want to provide organic baby food.

Link between Producer & Retailers

DRIVERS OF GROWTH



Successful marketing

Organic products will be successfully marketed when the price premium over conventionally produced products is perceived to be moderated.



Price Focus

Experts anticipate continuous pressure on price premiums in the next couple of years. Consumers tend to accept price premium between 10-30%.



Trust

Without a clear & honest liaison, it is impossible to develop a competitive fresh produce organic future for any of the parties. It can not be a “Jungle” every week.



Image & Communication

Organic producers and retailers must together project a credible and high quality image. We have to speak the same language. Capacity for talking and listening produces success in both ways.



The 3B's

1. **Bueno**- Good quality, High standards, taste.
2. **Bonito** – Good Appearance
3. **Barato**- Competitive / Price Orientated



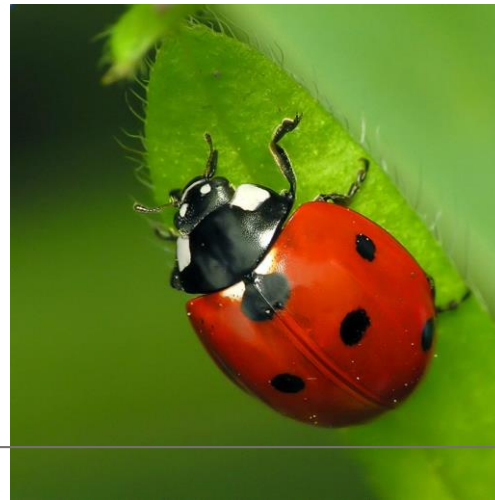
CONCLUSION

- **MARGINS** are decreasing & under minimums for producers. Prices fall but never go up anymore.
- **PRODUCTION COSTS** increase every year 5 - 10% in EU.
- **DEFLATION** in fresh produce prices since 2000 is more than 20%
- **LESS PRODUCERS**, bigger ones, more specialization, more dependent on final customers. This is the trend.



CONCLUSION

- **ONLY VERY PROFESSIONAL** growers with optimum conditions will survive. Independent of their size.
- **COOPERATION:** Splitting the cake between all parties (the good & the bad). Growers cannot be the end of the chain anymore, taking Residual values.
- **INVESTMENT** in the sector is declining in the last years. Actually focusing on sustaining fixed structures.
- **THE CHALLENGE-** consolidate & bring new organic consumers.



Asia market, Chilean organic blueberries





BIOFRUIT CONGRESS

MADRID 24 OCT. 2018

THANK YOU !

pierre@eurofresh-distribution.com

+33.761.541.522

@EUROFRESHD



Sponsors:

