

# Addressing Organic Consumers in Europe

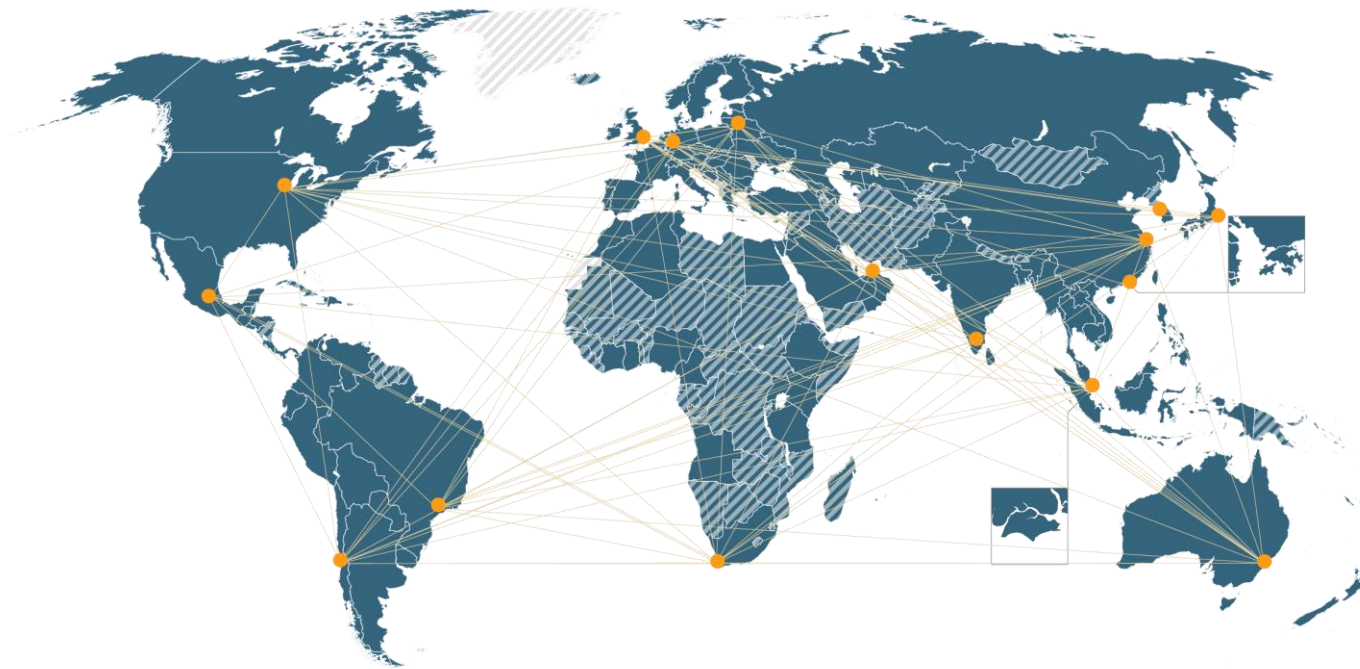
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October 2022

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# Euromonitor International network and coverage



## 16 OFFICES

London	Tokyo
Chicago	Sydney
Singapore	Bangalore
Shanghai	São Paulo
Vilnius	Hong Kong
Santiago	Seoul
Dubai	Düsseldorf
Cape Town	Mexico City

## 100 COUNTRIES
























in-depth analysis on  
consumer goods and  
service industries

## 210 COUNTRIES + AND TERRITORIES






demographic, macro- and  
socio-economic data on  
consumers and economies

# Research expertise



## Consumer Products

-  Alcoholic Drinks
-  Apparel
-  Automotive
-  Beauty and Personal Care
-  Cannabis
-  Consumer Appliances
-  Consumer Electronics
-  Consumer Health
-  Eyewear
-  Fresh Food
-  Health and Wellness
-  Home and Garden
-  Home Care
-  Hot Drinks
-  Luxury Goods
-  Nutrition
-  Packaged Food
-  Personal Accessories
-  Pet Care
-  Product Claims and Positioning
-  Soft Drinks
-  Tissue and Hygiene
-  Tobacco
-  Toys and Games



## Services

-  Consumer Finance
-  Consumer Foodservice
-  Retailing
-  Sports
-  Travel

## Supply

-  Ingredients
-  Packaging





## Analytics

-  Competitor Analytics
-  Industry Forecast Models

## Economies

-  Business Dynamics
-  Cities
-  Economy, Finance and Trade
-  Industrial
-  Natural Resources

## Consumers

-  Digital Consumer
-  Households
-  Income and Expenditure
-  Lifestyles
-  Population

# Contents

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- The State of Organic Packaged Food Market in Europe
- Consumer Motivations to Choose Organic
- Risks and Competition
- How to Move Forward



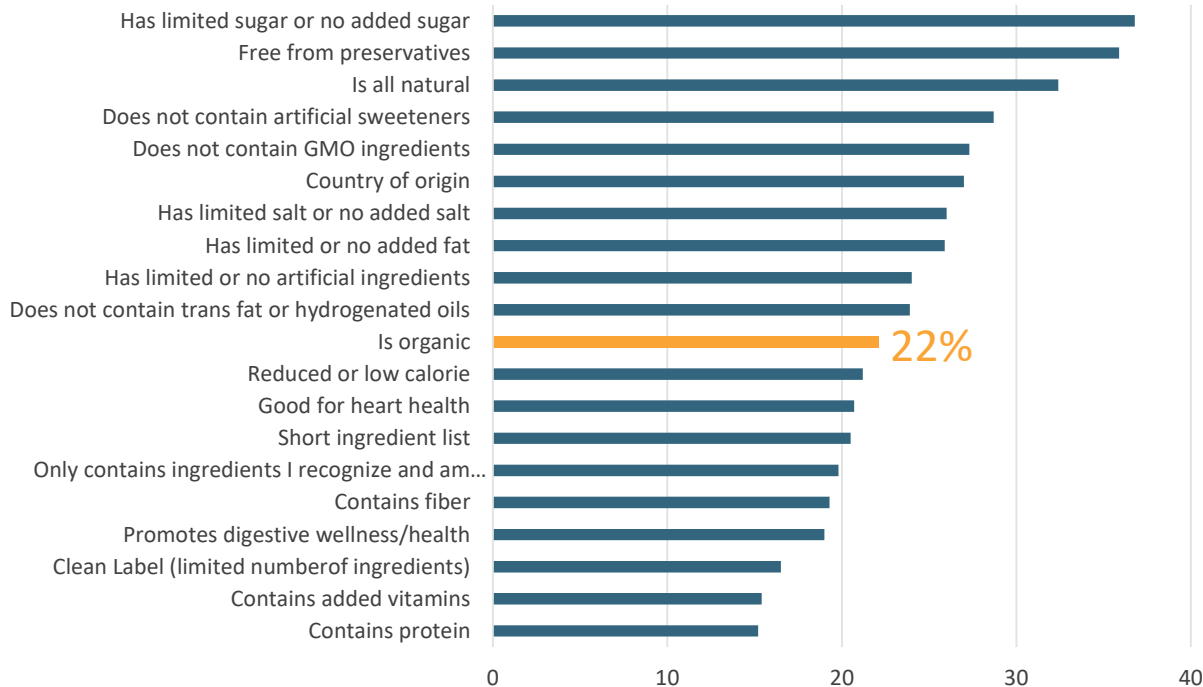
A woman with long dark hair, wearing a striped shirt and a dark backpack, is standing in a grocery store aisle. She is looking down at a product on a shelf. The shelves are stocked with various organic products, including jars and boxes. The entire image has an orange tint.

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# The State of Organic Market

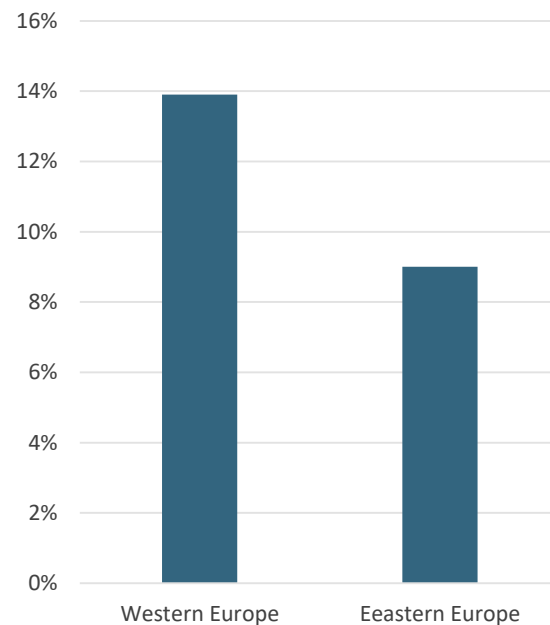
# What consumers currently look for

## European Consumer Ingredient Preferences, 2022



Source: Euromonitor Voice of the Consumer: Health and Nutrition Survey, fielded 2022 n:20236

## Organic Digital Shelf Share in 2021



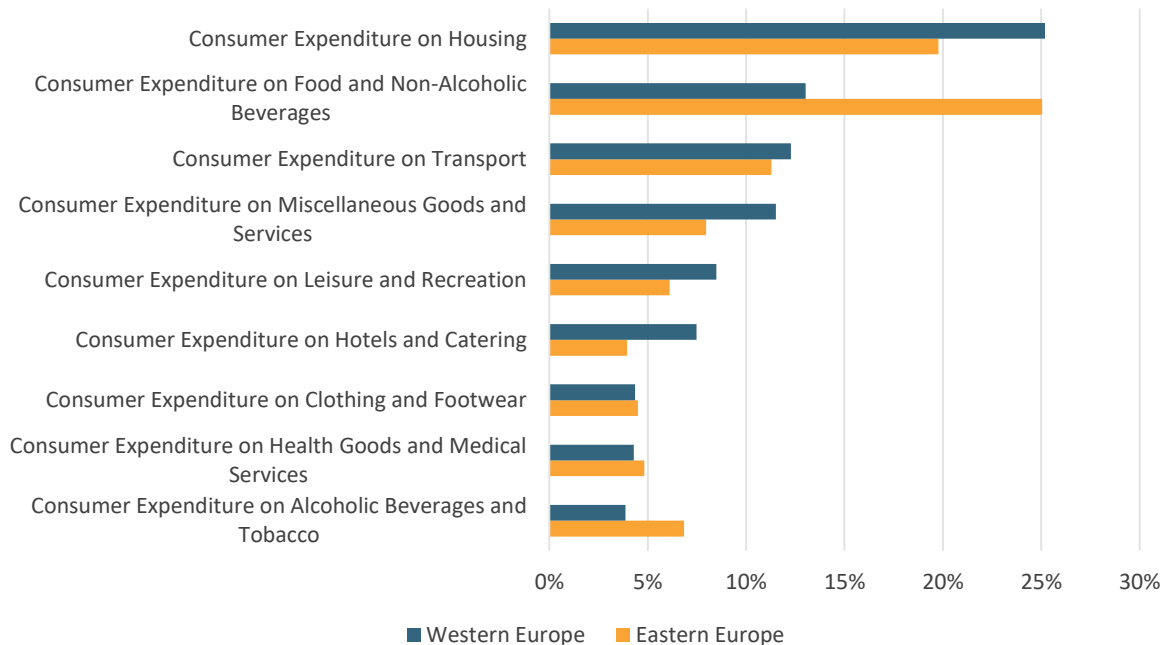
Source: Euromonitor Product Claims and Positioning

# Consumer expenditure by category in 2021

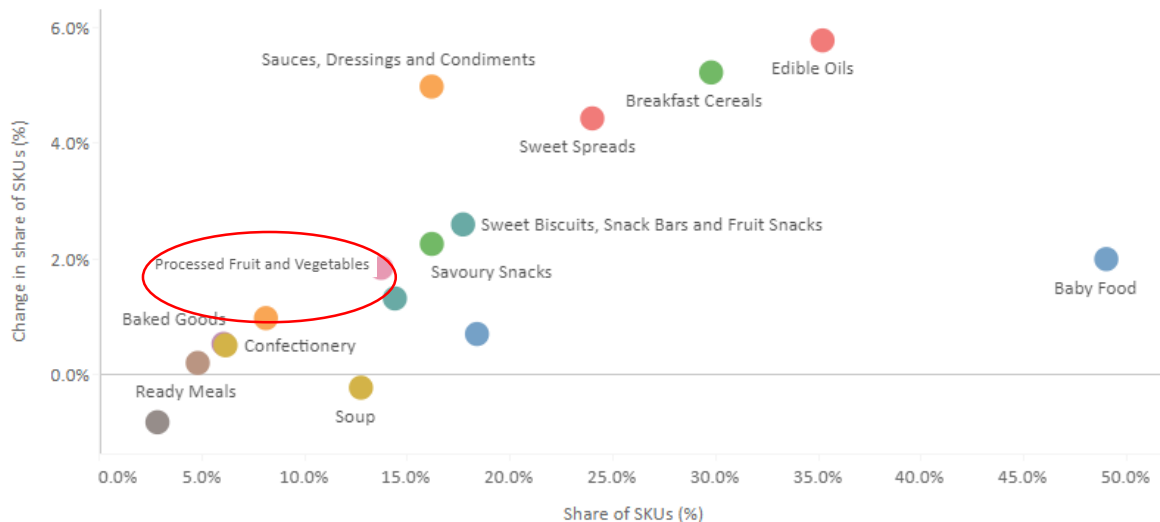


Image source: Unsplash.com  
Source: Euromonitor Passport

## Consumer Expenditure by Category in 2021



## Organic SKUs Development by Category in 2020-2022



## Baby food

Share of organic products 49%

Growth in share 2%

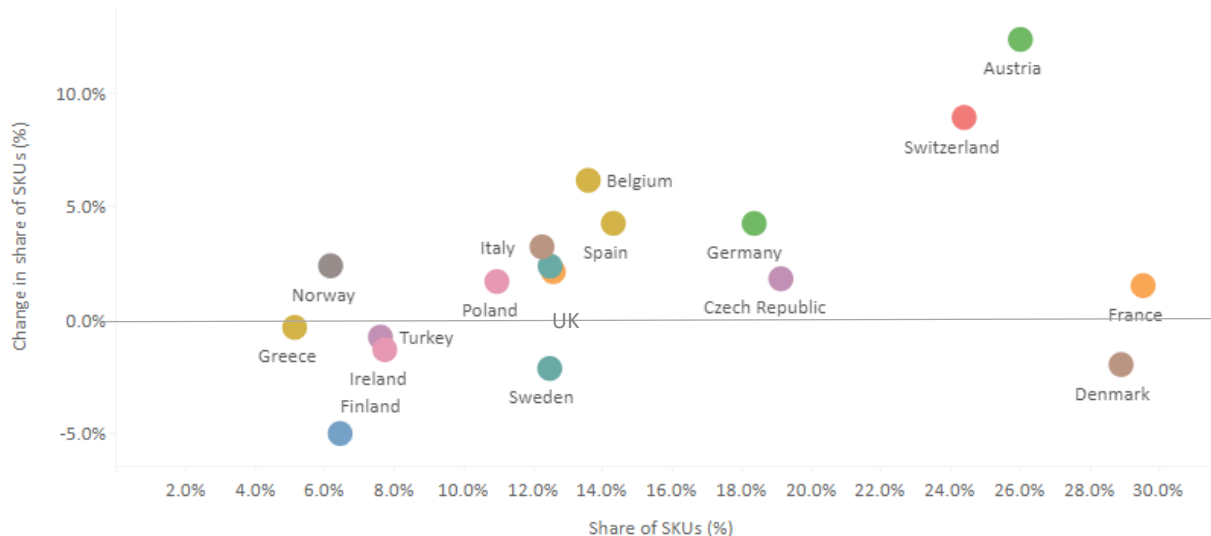
## Edible oils

Share of organic products 35%

Growth in share 6%



## Organic SKUs Development by Country in 2020-2022



# France

Change in organic share of SKU  
was 1.5%

# Denmark

Its organic offer online shrinks by  
-2%

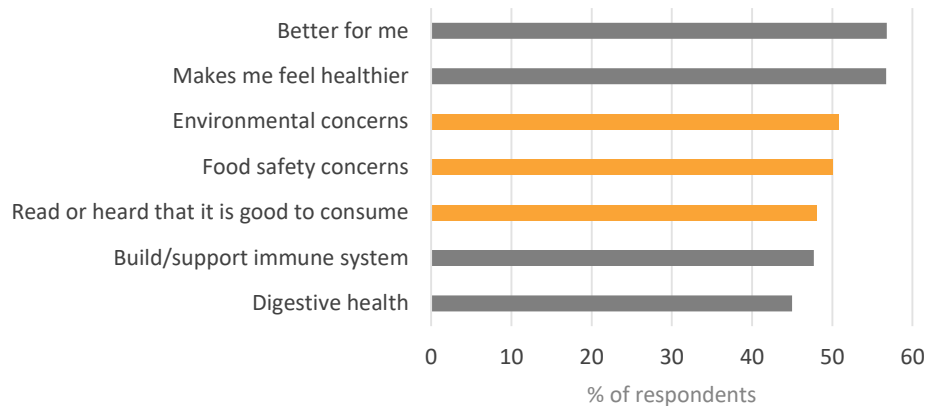
# Austria

Organic claims online grew by  
12,4%

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# Consumer Motivations to Choose Organic

## Consumer Reasons for Choosing Organic in 2022

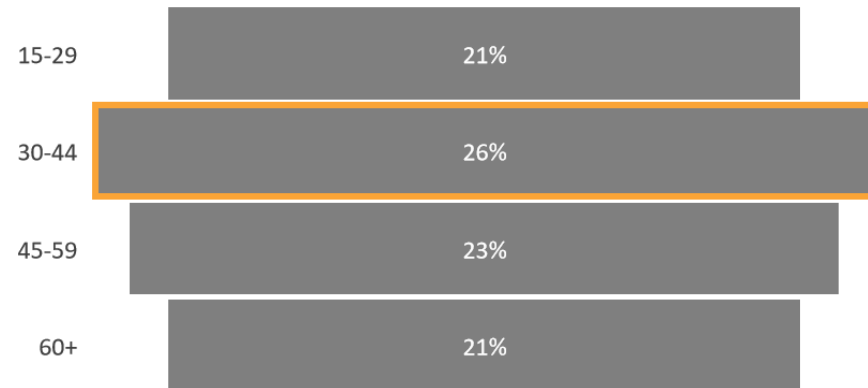


Source: Health and Nutrition Survey 2022 n:20236



Images source: Unsplash

## Organic Ingredient Preference by Age in 2022



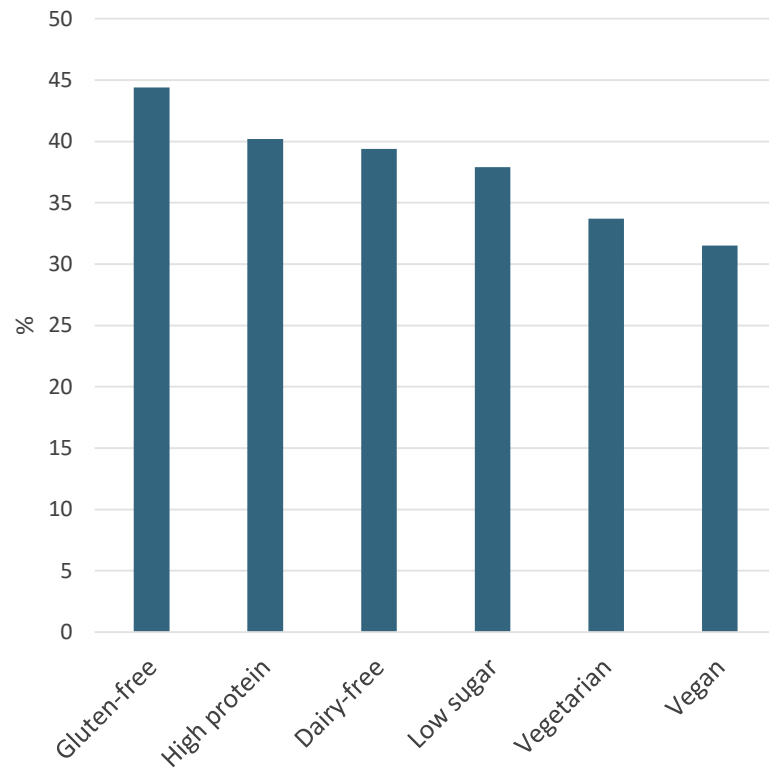
Source: Health and Nutrition Survey 2022 n:20236



Image source: Unsplash

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## Organic Ingredient Preference by Dietary Restrictions



Source: Health and Nutrition Survey 2022 n:20236

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# Risks and Competition

# Economic uncertainty accelerates as inflation reaches double digits

## Consumer Price Index Inflation Growth in 2022

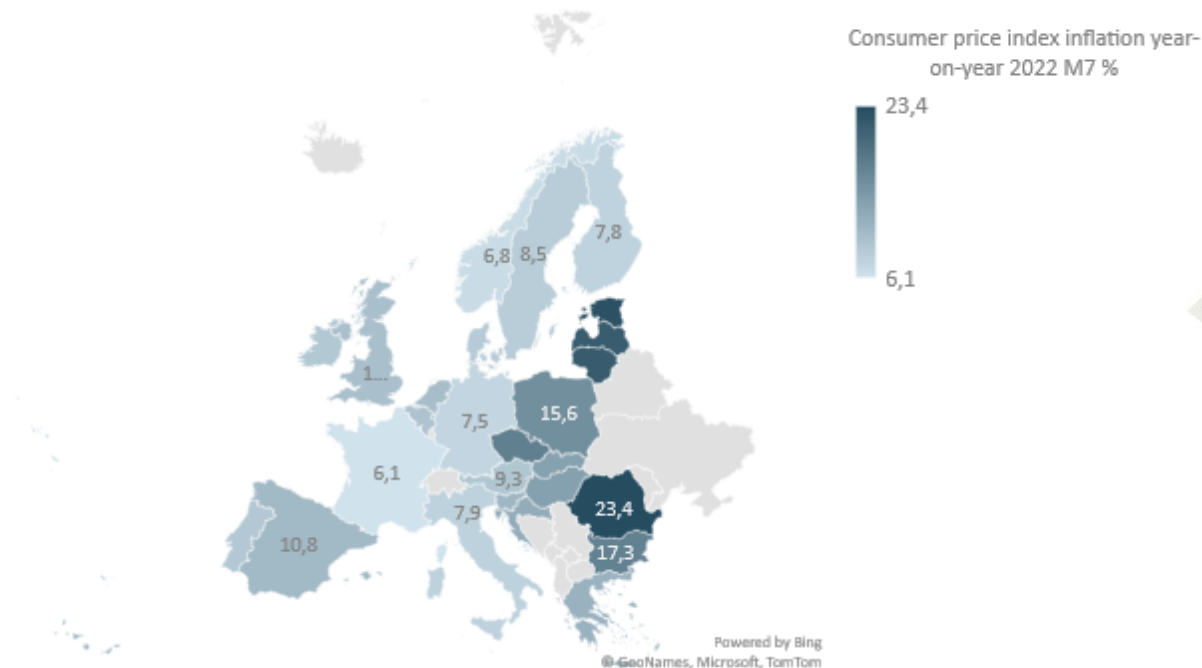
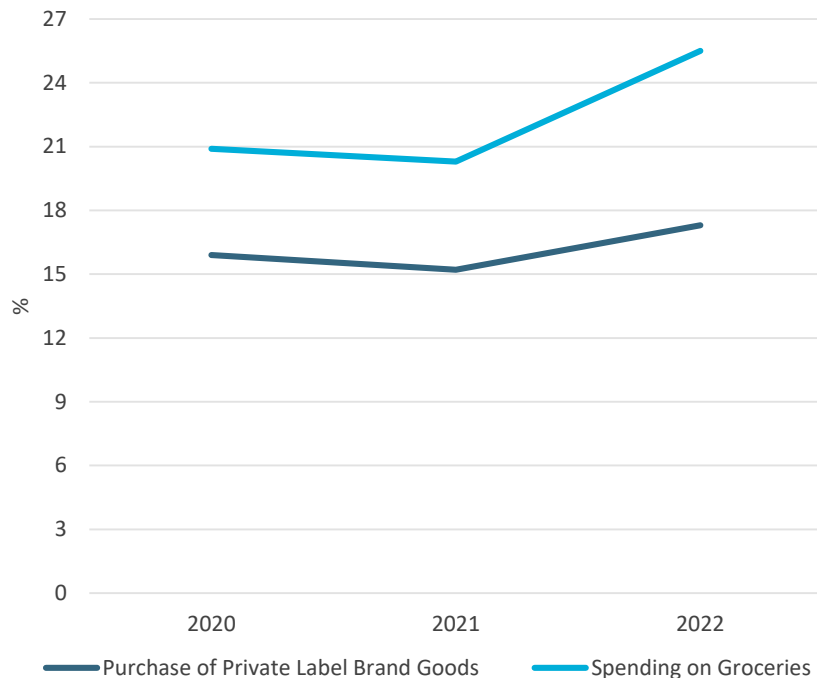


Image source: Unsplash.com



# Value for money products regain focus

## Consumer Spending Priorities

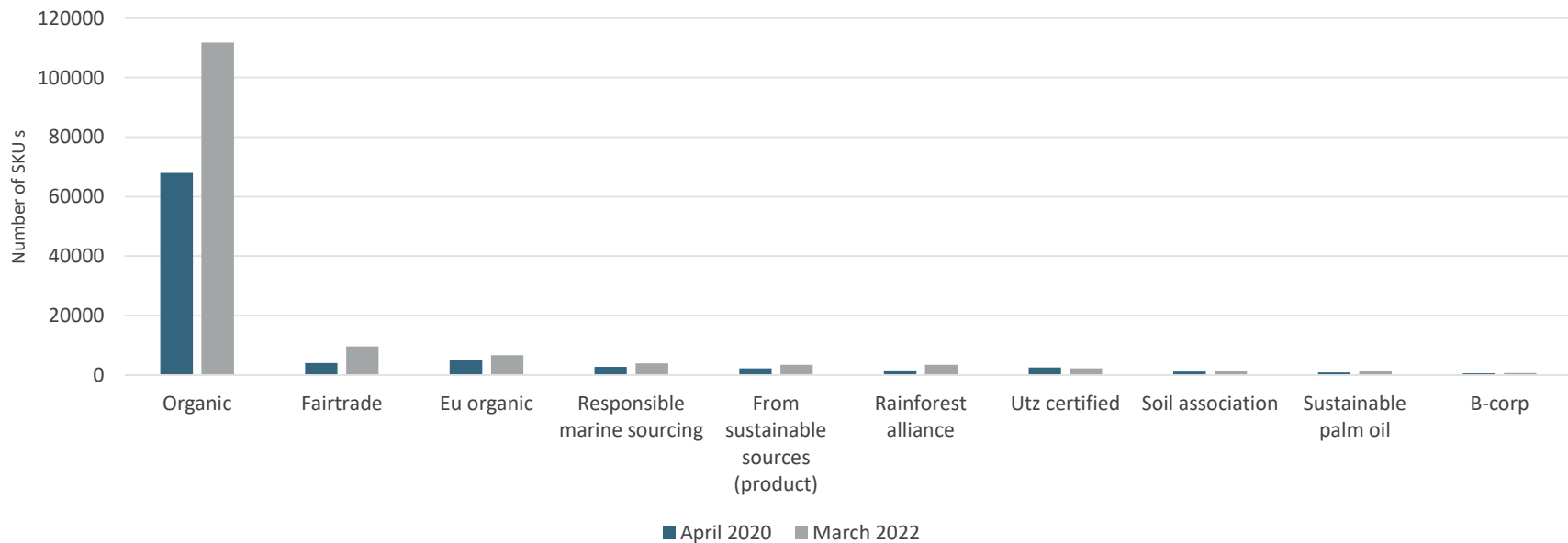


In 2021 Czech Internet retailer Rohlik has introduced its own PL brand that presents cheaper price tag as well as organic and other sustainable qualities. Miil brand is also strongly stating its commitment to reduce CO2 emissions and aims to inform its consumers about carbon footprint of their yogurt or milk drink.



# Organic dominates among sustainable sourcing claims

Packaged Food SKU Count by Product Attribute in Europe



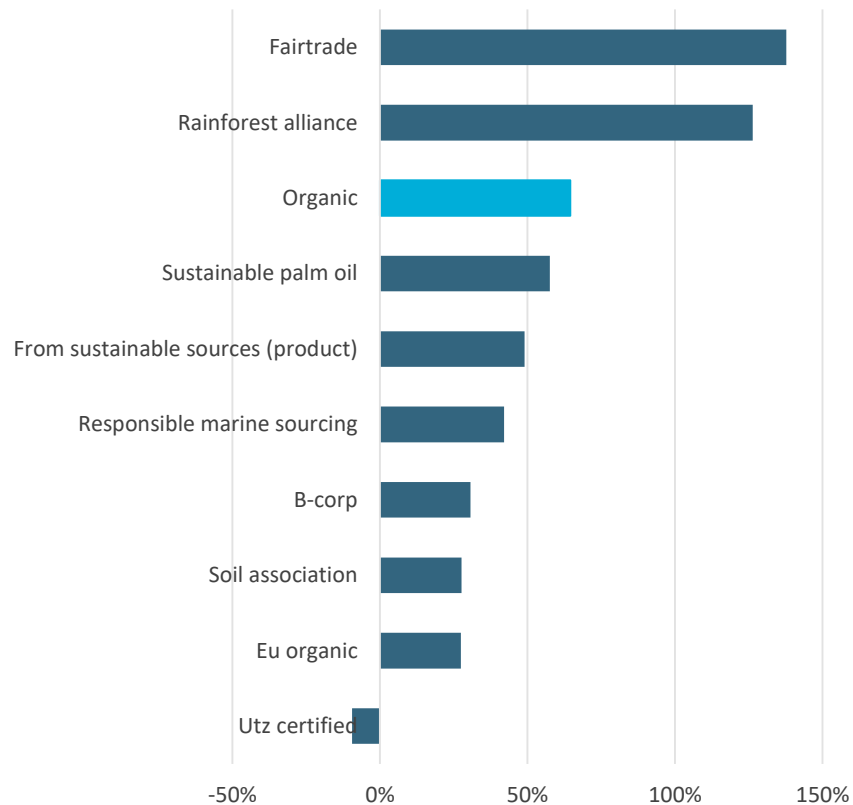


FAIRTRADE  
INTERNATIONAL

Image source: seeklogo.com

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## Growth of Online SKUs with a Claim in 2020-2022



Source: Euromonitor VIA

# Most popular claims in regions in 2021

## Western Europe

14%



10%



8%



## Eastern Europe



10%



9%



9%

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# The Way Forward

# Value added integration and communication

Miel Muria - organic quality ,100% compostable packaging claim, short and clear ingredients list



French organic dairy with Fair for Life claim adds Too Good To Go claim which fights food waste

Expands organic food horizons – Oceanfruit's innovative and sustainable prepared seaweed salad



ORGANIC



100% PLANT-BASED



GLUTEN-FREE



GOOD IMPACT



# Drivers for organic food growth

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Growing health and food safety concerns



Focus on sustainability



New consumer priorities

# Thank you!

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