

Market update on organic production

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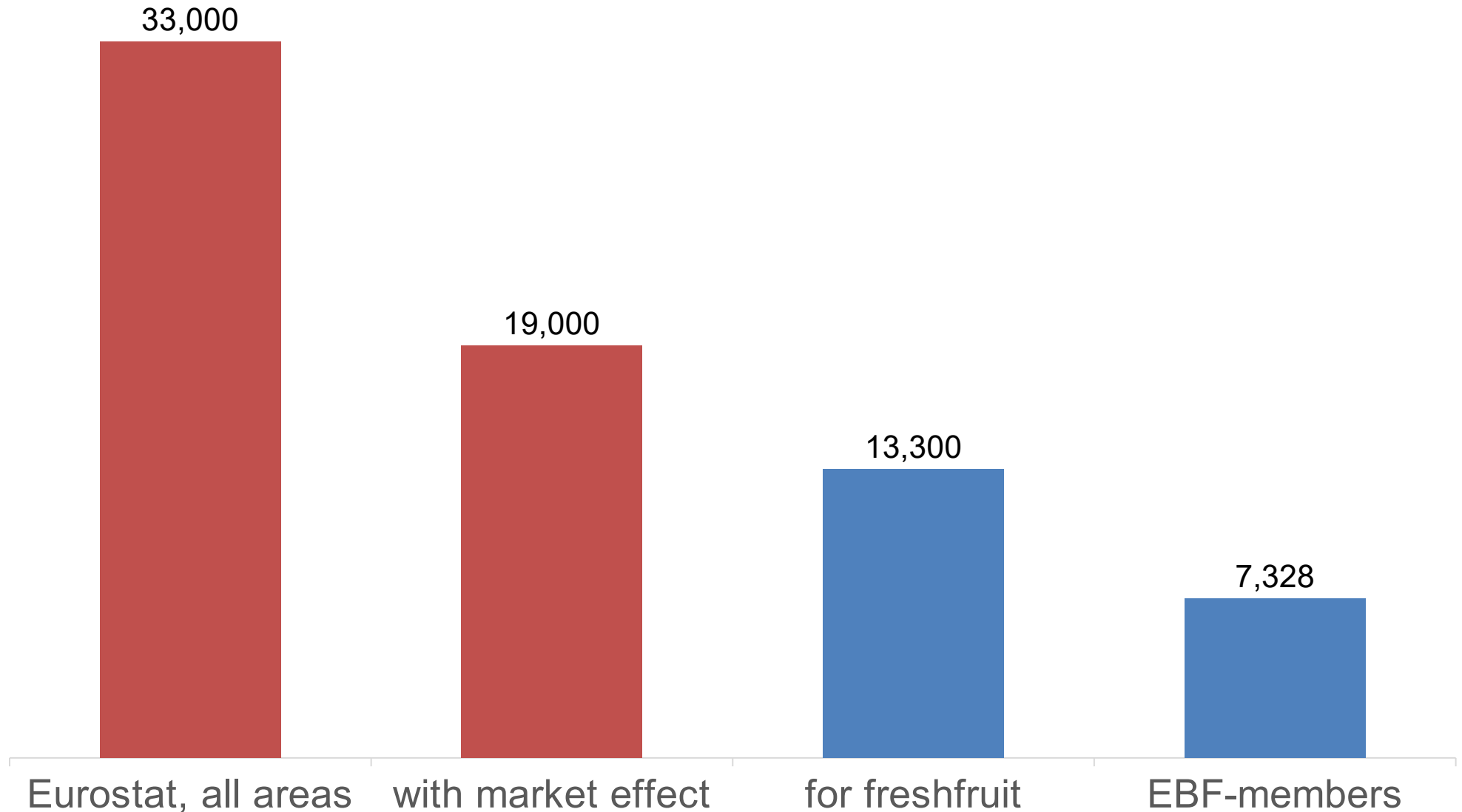


**Fritz PREM, IFOAM Organics Europe
President of European Biofruit Forum**

CDG 01.10.2021

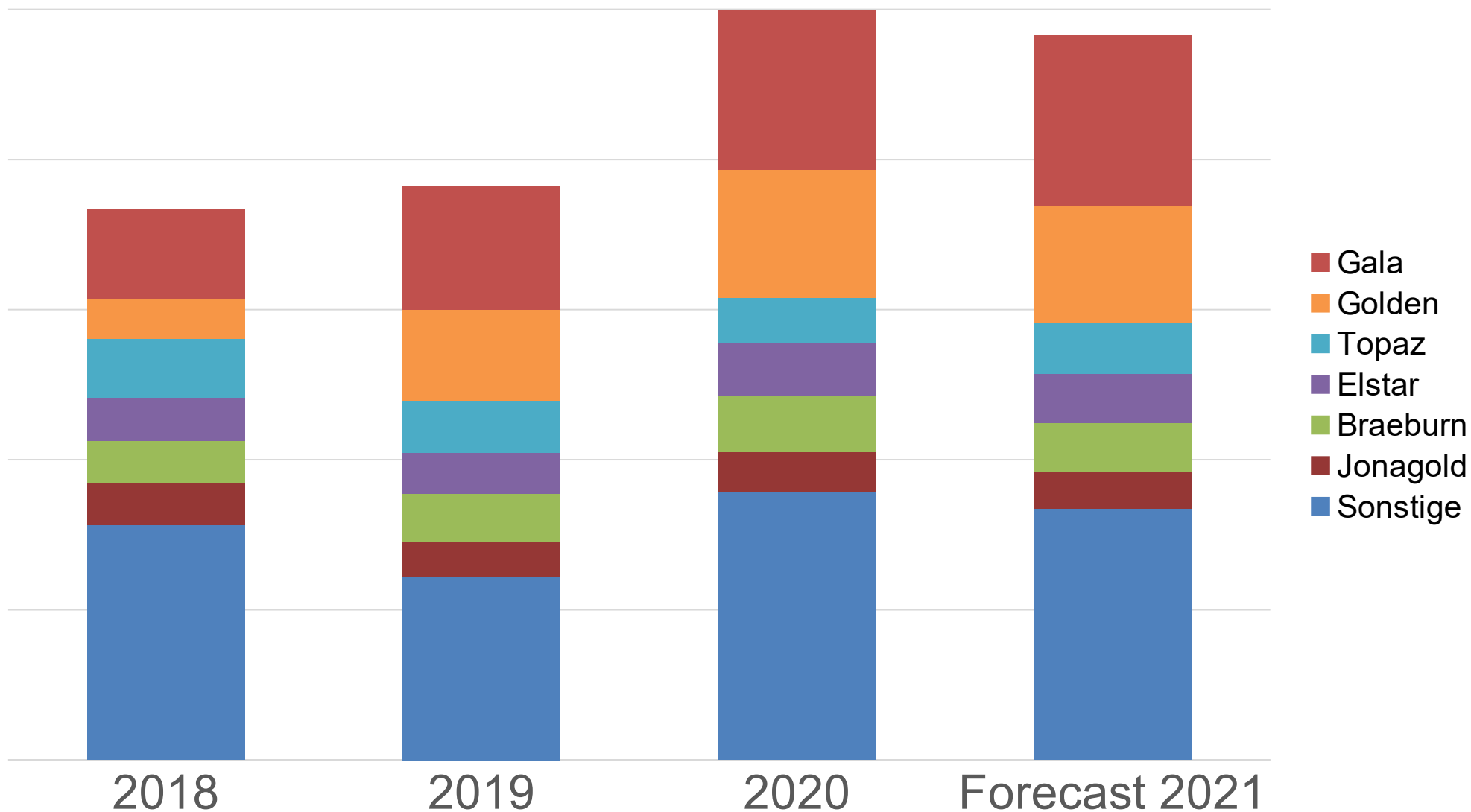
Organic apple Area in hectares in the EU 2019

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Apple varieties organic freshfruit production

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Organic apple market view 2021/2022



- Plus 10% compared to the previous year due to new converters in Italy, France and Germany
- Organic apple prices will become even more segmented (regional and premium programmes)
- Demand and production are growing all in all at a similar rate, but with regional differences
- Specialist organic markets grow more slowly, full-range retailers and discounters faster

Bio production

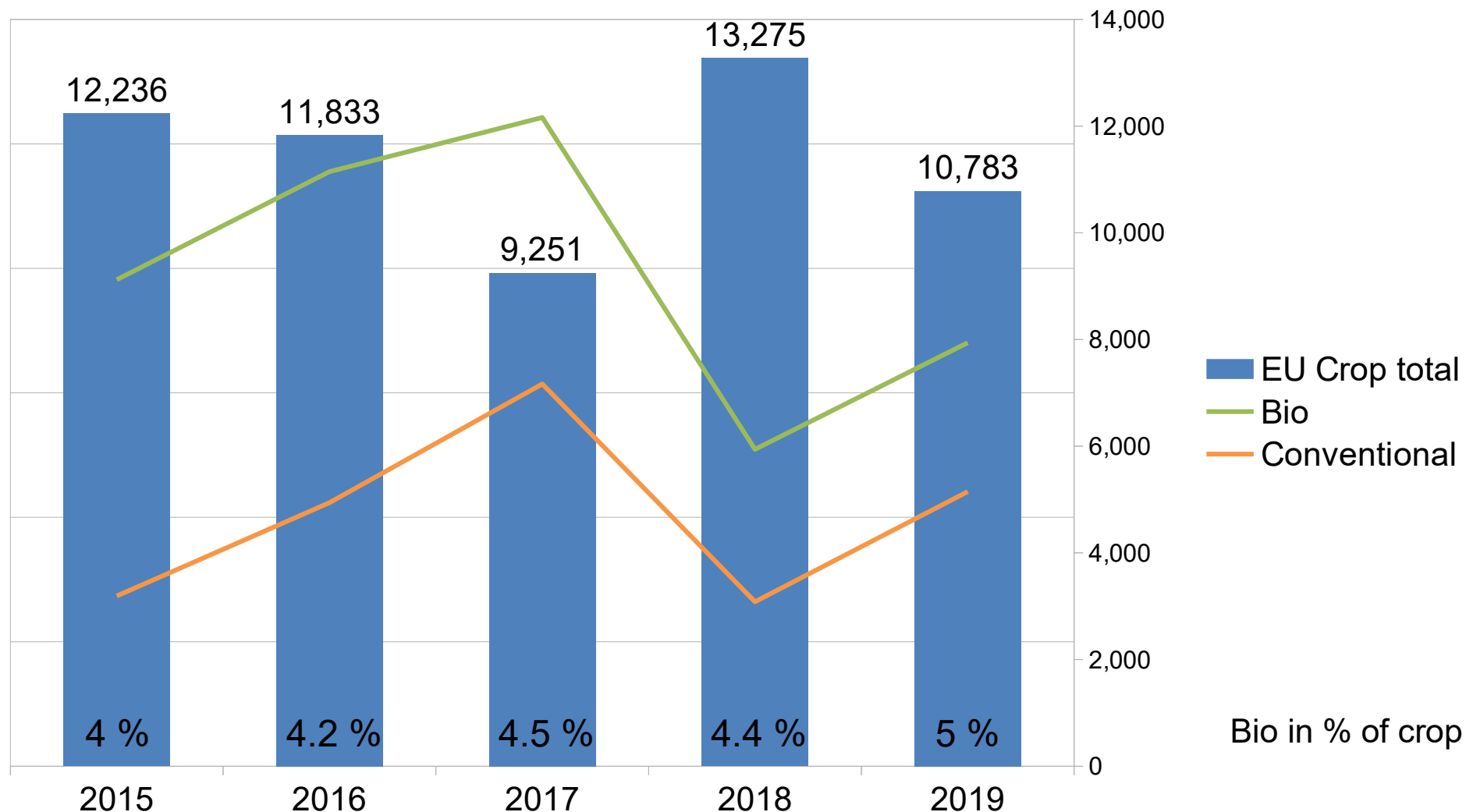


36 months conversion period for changeover at the soil, the microbiology in the orchard and the ideology of the farmer ;-)

- 25% lower yields
- 10% lower packout
- Higher production risk
- Higher production costs (more manual work)
- Higher price

Quantities and grower prices

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Profit: Bio / Conventional



- In difficult conventional years, organic production is more profitable than conventional production.
- In years with lower EU harvests and good selling seasons, conventional production is more profitable.
- The range between the most profitable organic farms and the deficit farms for the same products is much wider than for conventional production.

Outlook for the next years



- Some regions already have 25% organic apple production
- The share in the EU rises to 6 - 7% of the total EU harvest
- In the well-developed organic markets, the market for organic apples is currently growing by 7 - 15%
- The organic market is becoming more segmented: EU organic standard is the entry segment and high quality organic customer programmes are premium segments.

Thank you for your attention!



Fritz Prem
President of EBF

office@bioobst-forum.eu

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