RETAIL TRADE

ORGANIC MARKET REPORT 2025

ORGANIC DENMARK

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ÄNGLAMARK SPIDSKÅL
DANMARK

PRICE IS AN ORGANIC PARTY KILLER – INFORMING CONSUMERS IS A KEY LIFEBELT

– making it easier and more compelling to choose organic

BY: RASMUS PREHN
– CEO OF ORGANIC DENMARK

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Consumers want to buy organic produce. They also seek an even broader range. Yet many still arrive at the checkout with conventional products in their shopping baskets. And this is not simply because they cannot find organic products on the shelves. Price is often the deciding factor.

While many have the intention to buy organic products, they find themselves thinking about all the other things they want to buy, their many bills and the tight-fisted bank advisor. It is also an ingrained instinct for many of us to choose the cheapest alternative. Danes are also among the consumers in Europe who spend the least amount of money on food, which is a shame considering the impact on quality, health and sustainability.
In other words, price is an organic party killer. Even though we are seeing good demand figures for organic products, they are not nearly as high as they would be if organic prices were more competitive compared to conventional products.

While price is king, visibility, awareness and marketing are very important. We know that more people buy organic products when they are visible and promoted in the store, and when there is general awareness of organic produce in society. It has to be easy for consumers to choose organic, and retailers must achieve the best possible sales for their efforts. Visibility, marketing and good arguments are a big help.

Given the amazing benefits offered by organic produce, I am confident that many more would buy organic if they knew more about all the advantages, and also the disadvantages of not choosing organic. For example, I was saddened to read in this report that only 1.9% of the strawberries sold in Denmark are organic. Especially when you consider that pesticide residues are found in 94% of non-organic strawberries from abroad, while there are zero pesticide residues in organic strawberries. If this knowledge was more widespread, and also clearly communicated at the supermarket shelves, I am convinced that many more people would choose organic strawberries. Who wants to consume pesticides, even if served with milk or cream or on top of a sponge cake?

The supermarkets' own goals would also be more ambitious if all the benefits of organic products were reflected not just in the supermarkets' CSR policy, but also in concrete action plans, goals and KPIs. For too long, many players have focused solely on carbon emissions, even though there are many other crucial indicators to measure if we want to live healthy and for humanity to survive on this planet. I would like to see much clearer organic marketing in Danish supermarkets, and crystal clear information on the climate, environment, biodiversity and animal welfare benefits of choosing organic. We know that informed, information-seeking consumers buy more organic products than those who are not. The key to increasing organic demand is therefore more information – ideally presented at eye level as people pick the product off the shelf and put it in their shopping basket. So even though we are celebrating 35 years since the launch of the red organic Ø label with great pride and excitement this year, we need to step up our game if the organic segment is to grow. The organic narrative needs to be retold, with renewed energy and conviction.

I hope you enjoy reading this market report. I hope it provides a good overview and new insights.

Enjoy your reading!

POSITION OF ORGANIC PRODUCTS ON SUPERMARKET SHELVES

The red Ø label is 35 years old! We hope you will join us in celebrating this milestone.

BY: BIRGITTE JØRGENSEN
MARKET DIRECTOR, RETAIL,
ORGANIC DENMARK

Does this mean organic produce has come of age? It certainly means that retailers are placing the exact same demands on organic food as they are on conventional food in terms of branding, food certifications, marketing subsidies, competitive pricing, etc. But it also means organic products are no longer the bold new feature on supermarket shelves getting all the attention. There is a battle going on for organic customers – and the share of sales is increasing for both the private label and discount segments.

However, as you can read on the following pages, organic sales in grocery stores are on the rise again, and volume also rose in the second half of 2024. This is partly due to consumers buying more frequently and – especially in supermarkets – putting more organic products in their shopping baskets.

In late 2024 and early 2025, the three major grocery groups in Denmark launched new strategies – Salling Group (Aspire '28), Coop (MOD2028) and Dagrofa (gro'27). It will be interesting to see how large and clear a role organic products play in these strategies.

However, one thing is certain – families with young children and older couples without children still remain the primary consumers of organic products. Each group expects – in their own way – a broad and deep range of organic products on grocery store shelves. During 2024, the 'Elderly without children' group became the consumer group that buys the most organic food overall, and this group is increasingly demanding food products with more added value and great taste.

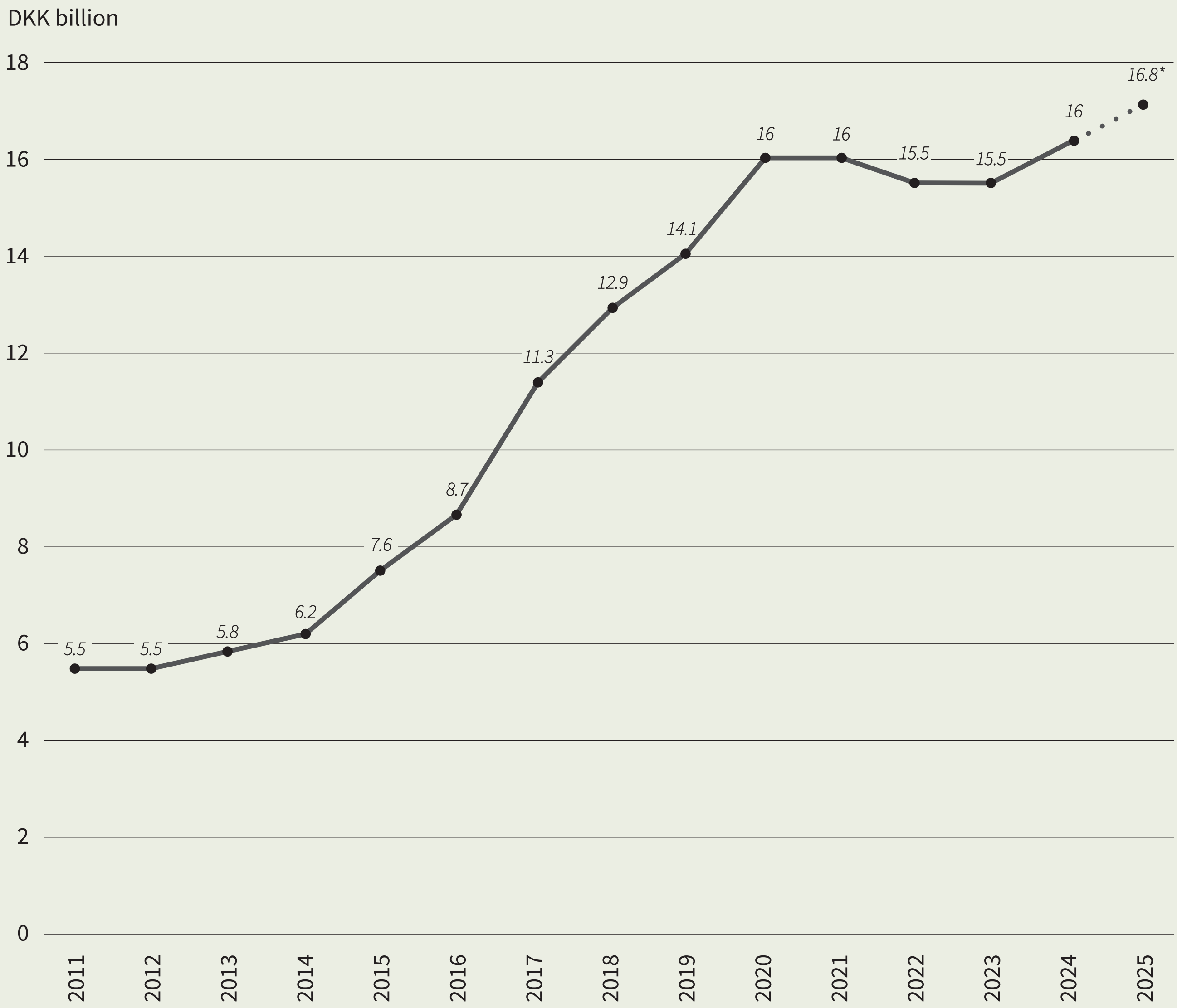
However, one group stands out – young people aged 18-39 – the new organic consumers in the food chain. They have a lower for demand organic products, and we need them on board if we are to achieve the EU goal of 25% of food consumption and agricultural land being organic by 2030. It is therefore important that the entire value chain works to clearly market how organic food contributes to the green transition.

Organic produce can and must play a major role in our future meals – but this requires that we remind each other to tell the story again and again – also to the new generations of consumers.

• Retail trade incl. online shopping:	DKK 16 billion
• Farm shops, specialty shops etc.:	DKK 0.6 billion
• Foodservice:	DKK 3.7 billion*

SALES OF ORGANIC PRODUCTS

ORGANIC RETAIL SALES 2011-2025 (DKK BILLIONS)



*Source: 2011-2024 Statistics Denmark. *2025 estimate by Organic Denmark*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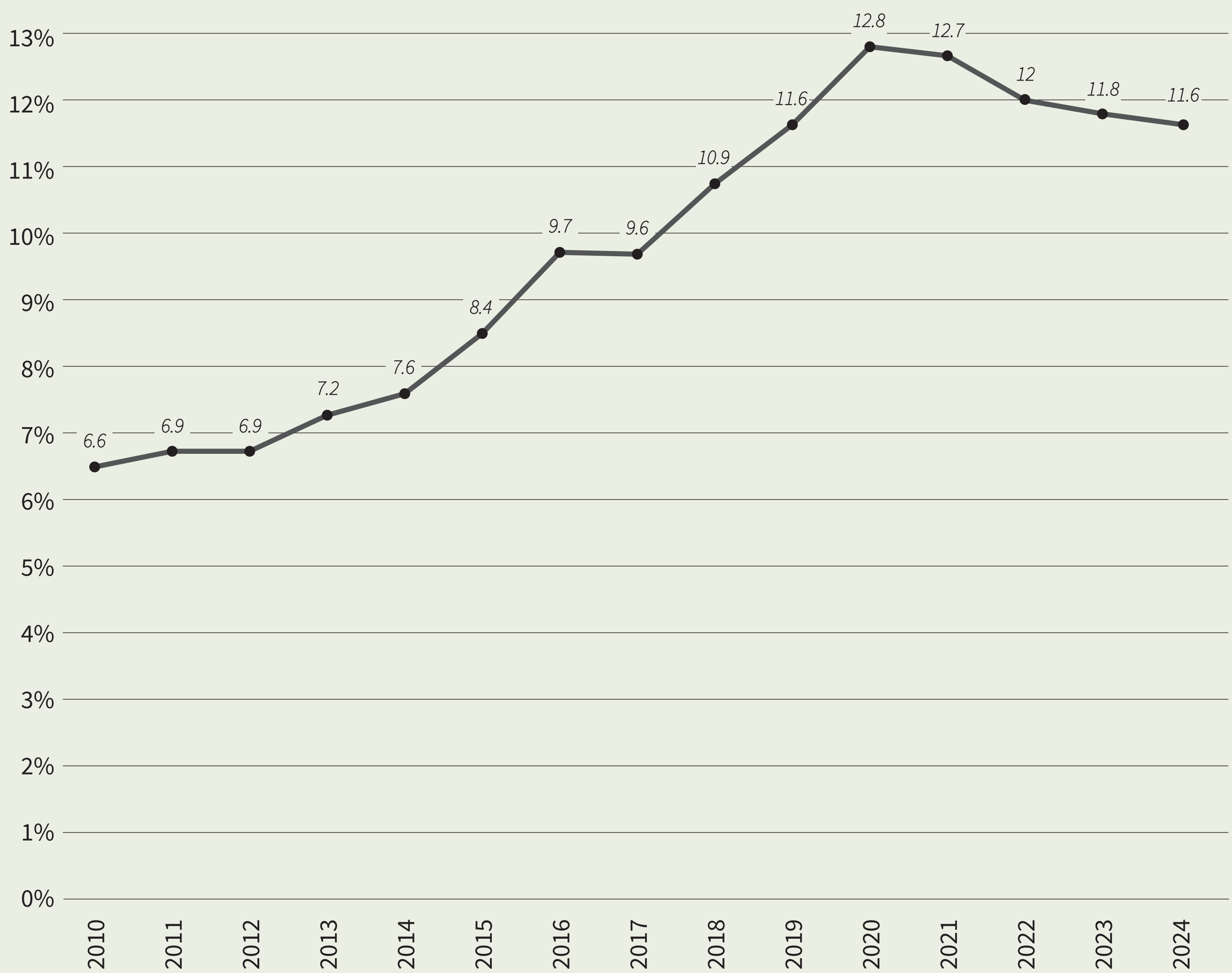
ORGANIC
MARKET SHARE

According to Statistics Denmark, the organic market share of retail trade in 2024 was 11.6% measured by value. Inflation and rising prices continued to impact consumers' purchases. In terms of volume, there was a small increase of 2% compared to 2023

The value of consumer grocery purchases increased overall in 2024 according to Kauza shopper data, and organic food sales really took off in the second half of the year.

This is because organic consumers shopped more often, but also put more items in their shopping basket per trip. According to Kauza shopper data, this trend has continued into the first quarter of 2025, with organic consumers still shopping more frequently and the number of items in their shopping baskets remaining stable.

ORGANIC RETAIL MARKET SHARE AS A PERCENTAGE OF VALUE



Source: Statistics Denmark

SALES OF ORGANIC PRODUCTS BY PRODUCT GROUPS

Fruit, vegetables and dairy are the dominant product groups in organic sales. Together, these three product groups made up 61% of organic retail sales in 2024.

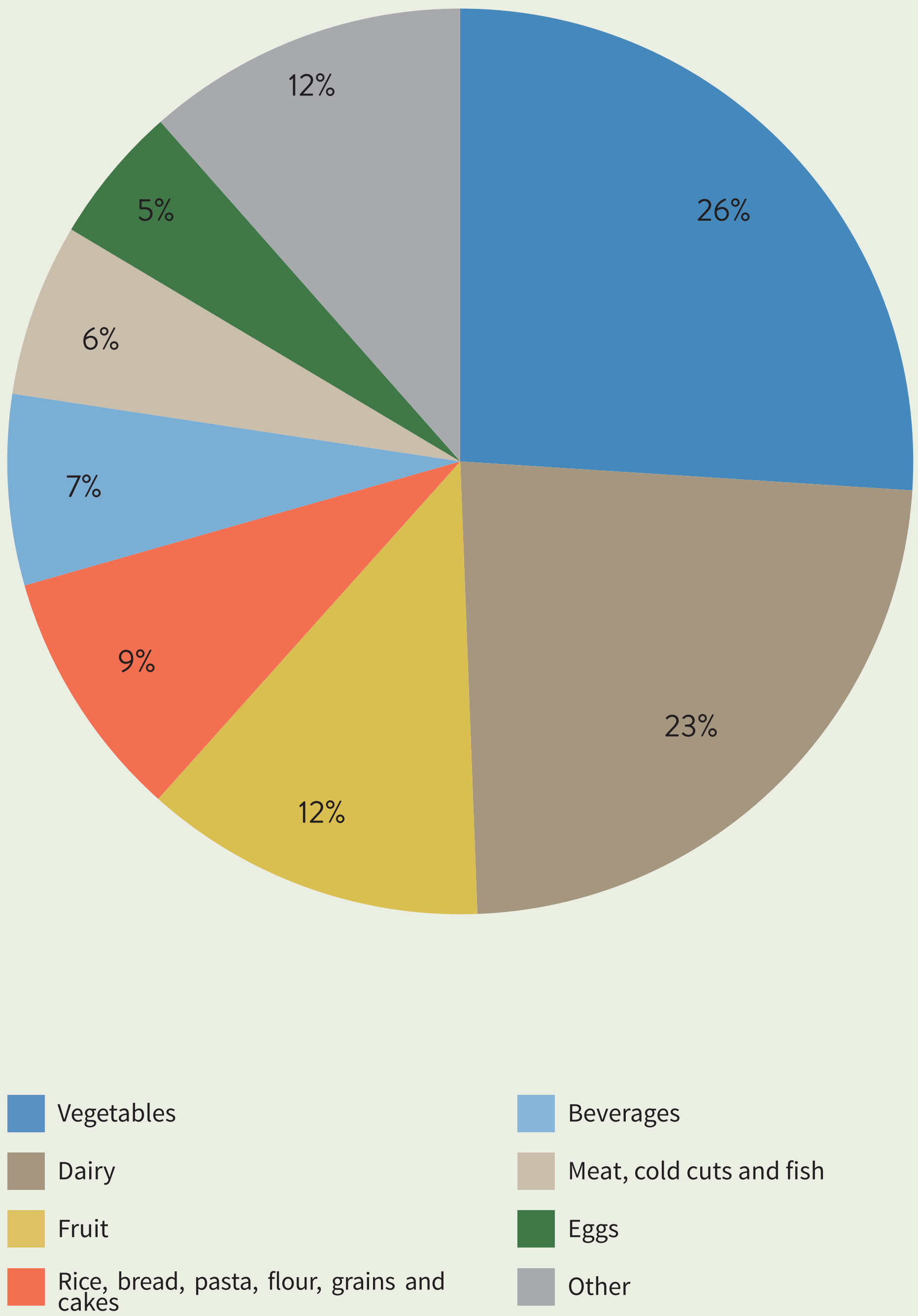
Sales of organic vegetables rose by 7% in 2024 in terms of value, but only 4% in terms of volume. Organic vegetables accounted for sales of DKK 4.2 billion. The rise for organic fruit was 6% in terms of value, but also only 4% in terms of volume. For the past ten years, fruit and vegetables have been the leading organic categories.

This is because the price gap between organic and conventional fruit and vegetables is not very large, and the absence of pesticide residues is the strongest consumer driver for buying organic products.

In other categories, organic egg production accounted for 30% of all eggs in 2024. Sales of meat, cold cuts and fish are stable and again accounted for 6% of total sales in 2024. Note, however, that organic chicken sales have increased by 9% and organic pork sales by 5% – both in value terms.

2024 was another year that saw many price increases, but organic food prices only increased by 1% on average.

SHARE OF TOTAL ORGANIC SALES BY PRODUCT GROUP IN 2024



Source: Statistics Denmark

ORGANIC MARKET SHARE
FOR VARIOUS PRODUCT GROUPS

ORGANIC MARKET SHARE FOR VARIOUS PRODUCT GROUPS BY VALUE IN 2024

HIGH >30%

Lemons
83.3%

Plant-based drinks
72.2%

Bananas
62.8%

Carrots
58.9%

Oatmeal
50.4%

Eggs
41.2%

Frozen vegetables
38.9%

Milk
38.0%

Cucumbers
33.8%

MEDIUM 10-30%

Flour
29.8%

Coffee
15.6%

Minced beef
10.6%

Source: Kauza shopper data

Data from Coop Analyse forms the basis for the 'organic ladder', which shows how consumers move up the ladder from basic goods like oatmeal and milk (need to have), to more luxurious products (nice to have) such as soft drinks, wine and beer. This is clearly reflected in the organic market share for each product.

The more expensive the produce or the more processing involved, the smaller the market share. This is usually because the price gap also increases as the consumer moves higher up the organic ladder. However, it is positive to see that most consumers are increasing their organic consumption – in terms of total value, but also by adding more product groups.

Compared to 2023, only small shifts have occurred according to Kauza shopper data. The market share for organic plant-based drinks fell by more than 20 percentage points, from 93.6% to 72.2%, but there have also been major changes in the product range within this group, with some variants being removed from store shelves.

The organic market share for minced beef rose from 8.2% in 2023 to 10.6% in 2024. This is exciting, given that beef prices have risen greatly, as well as the ongoing discussion of the role of cattle in the ecological cycle. It is worth monitoring this in the years ahead. Is the trend due to consumers eating less meat, and choosing organic? Product range has a major impact on organic market share. This is evident for products like rye bread and strawberries.

Seasonality, freshness and location are very important to consumers in relation to fresh fruit and vegetables – especially strawberries. The organic market share for strawberries is very small – 1.9% according to Kauza shopper data.

In several of their analyses, Madkulturen has found that Danes' preferred evening meal consists of rye bread and cold cuts, yet this is not reflected on supermarket shelves, where the range of organic rye bread and cold cuts is very small compared to conventional variants.

Jam
20.3%

Sugar
15.1

Cheese blocks
10.6%

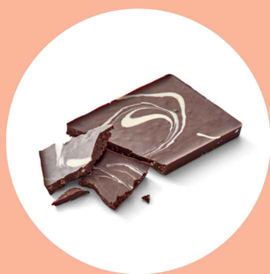
LOW <10%

Salami
8.5%

Wine
7.7%

Grapes
5.7%

Rye bread
4.9%



Chocolate
4.2%

Pork cuts
3.9%

Chicken cuts
2.7%

Strawberries
1.9%

Carbonated drinks
1.0%

ORGANIC MARKET SHARE
IN RETAIL CHAINS

The jostling to be organic market leader was intense in 2024. Rema 1000, SuperBrugsen and Netto make up a clear top three group, with Rema 1000 taking first place for the first time with a marginal lead over the other two. Together, the three chains account for 51.7% of organic grocery sales.

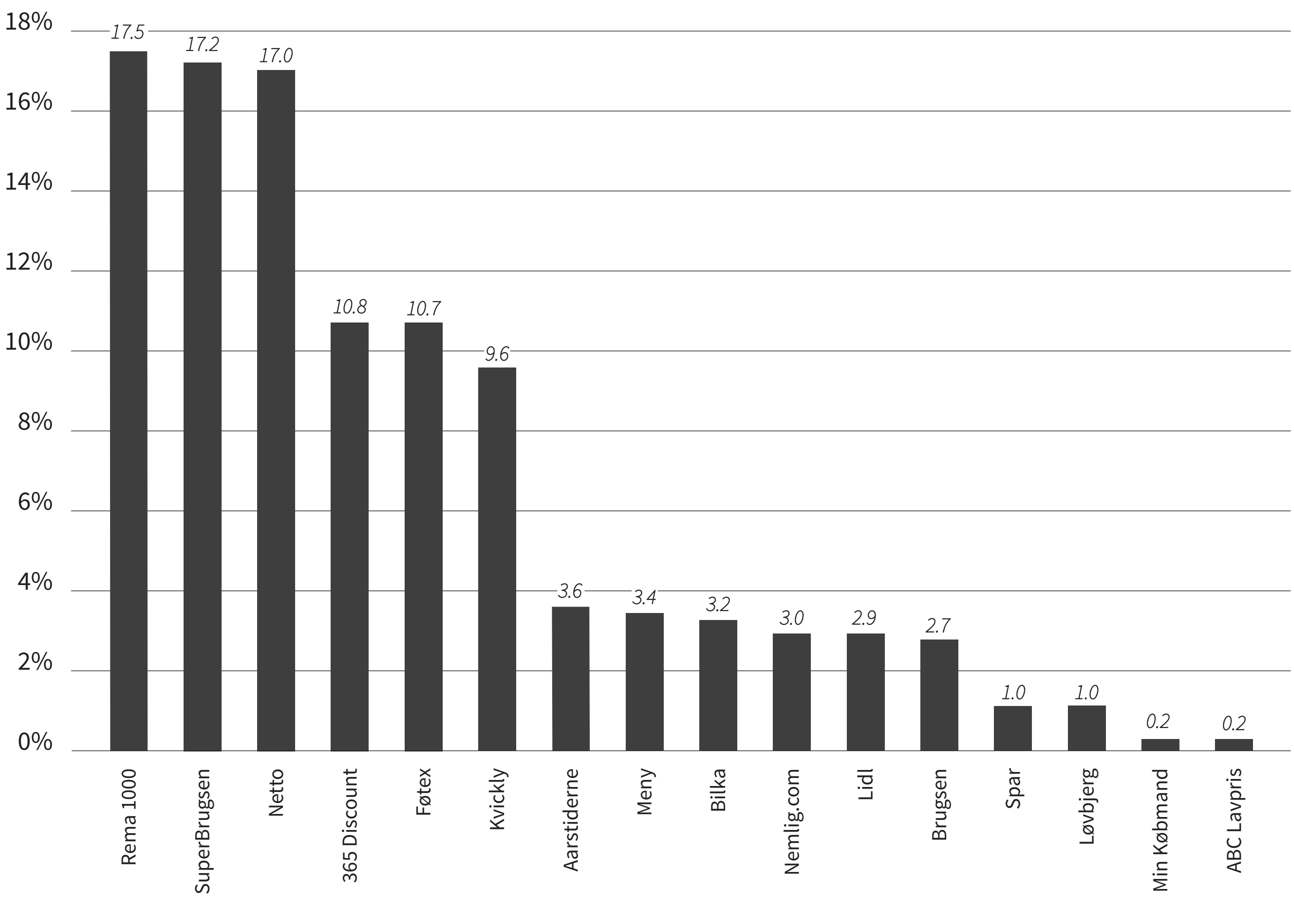
2024 was another year with a strong price focus, positioning efforts, store closures and acquisitions. The share of sales from discount chains increased in 2024 – in the grocery retail sector in general, and in the organic segment. According to Kauza shopper data, this is primarily because customers increased frequency – how often they shopped.

Price focus can also be seen in how often organic products are bought at discounted prices. In 2024, the promo share for organic food was 16%, compared to 25% for conventional food.

Yet despite the promo share being lower for organic food according to Kauza shopper data, this share had risen to an index value of 121 in 2024, compared to 2020.

The number of scanned EAN numbers should be seen as an indicator rather than as an exact number, as some products are sold using multiple EAN numbers, and the same product EAN can be sold via multiple grocery chains.

EACH CHAIN'S SHARE OF TOTAL ORGANIC SALES IN 2024



Source: Kauza shopper data. Aarstidernes' share has been estimated based on sales figures.

ORGANIC PERCENTAGE IN RETAIL CHAINS – HOW ORGANIC ARE THEY?

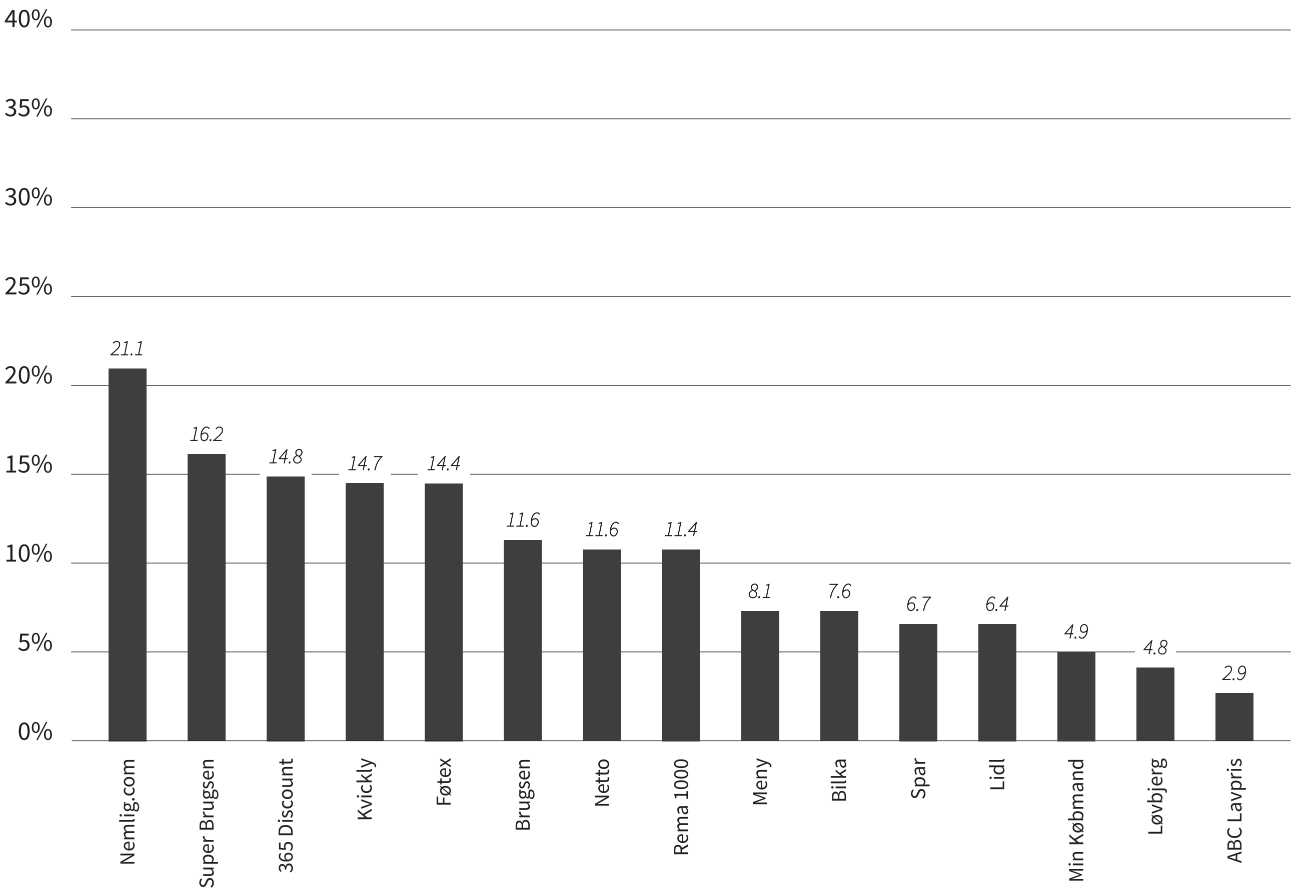
The supermarkets dominate the top five positions when measuring the organic percentage of each grocery chain's sales. This is because their organic product range is generally broader and deeper than the discount chains'. However, 365discount maintained its strong fourth place again in 2024.

All major grocery chains have their own organic private label range, spanning all categories from fruit and vegetables to carbonated drinks and wine. They are also regularly launching new products in new categories. In several chains, organic private label products are also occupying 'good' and 'better' value positions. High-profile partnerships between grocery chains and organic companies are also gaining ground. Examples include Coop and Thise dairy, Gram Slot and Rema1000, Løgismose and Netto, and the expected product launches in Føtex from Tjele Gods.

The strong focus on private labels can pose a challenge for brand suppliers, as private labels promote a higher loyalty from customers towards the given grocery chain. Private labels also add to price competition, and shift product development potential away from producers' brands to the grocery chains' private labels. Grocery chains often offer private label products as an affordable alternative, helping to make organic food accessible to more consumers. On the producer side, private labels can serve as their 'bread and butter', allowing them to innovate exciting new products. This stronger focus on private labels in grocery chains is being seen across Europe – among both organic and conventional food products.

Kauza's shopper data shows that there has been a marked increase in the number of unique scanned EAN numbers since 2021, and a relatively large shift towards private labels, especially within the organic segment. The index figures show that if 2021 is taken as the base year, the number of scanned brand EAN numbers has an index value of 78, and private labels have an index value of 102.

ORGANIC SHARE OF RETAIL CHAINS' FOOD PRODUCT SALES IN 2024



Source: Kauza shopper data

ORGANIC POTENTIAL OF THE GROCERY CHAINS

In 2024, Rema 1000 continued to have the greatest potential because so many customers shopped at their chain during the year. This is illustrated in the figure by Rema 1000 having the largest bubble. However, they are closely followed by Netto, Føtex, SuperBrugsen, Kvickly, 365discount and Meny.

Rema 1000 was slightly better at meeting their customers' needs for organic food than for groceries in general. While Meny, Spar, Lidl, Løvbjerg, Brugsen and the rest of the market were better at meeting their customers' needs for groceries in general. Nemlig, 365discount, SuperBrugsen, Kvickly and Føtex have customers who are more oriented towards organic products than the other chains. This is shown by their position to the right of the vertical axis.

WHO HAS THE GREATEST UNTAPPED POTENTIAL?
In 2024, Lidl, Meny, Spar, Løvbjerg, Bilka, MinKøbmand and ABC Lavpris were better at meeting their customers' needs for general groceries than for organic products. However, their customers are also less inclined to buy organic than Danes in general. The physical location of the stores naturally impacts how oriented the chains' customers are towards organic products.

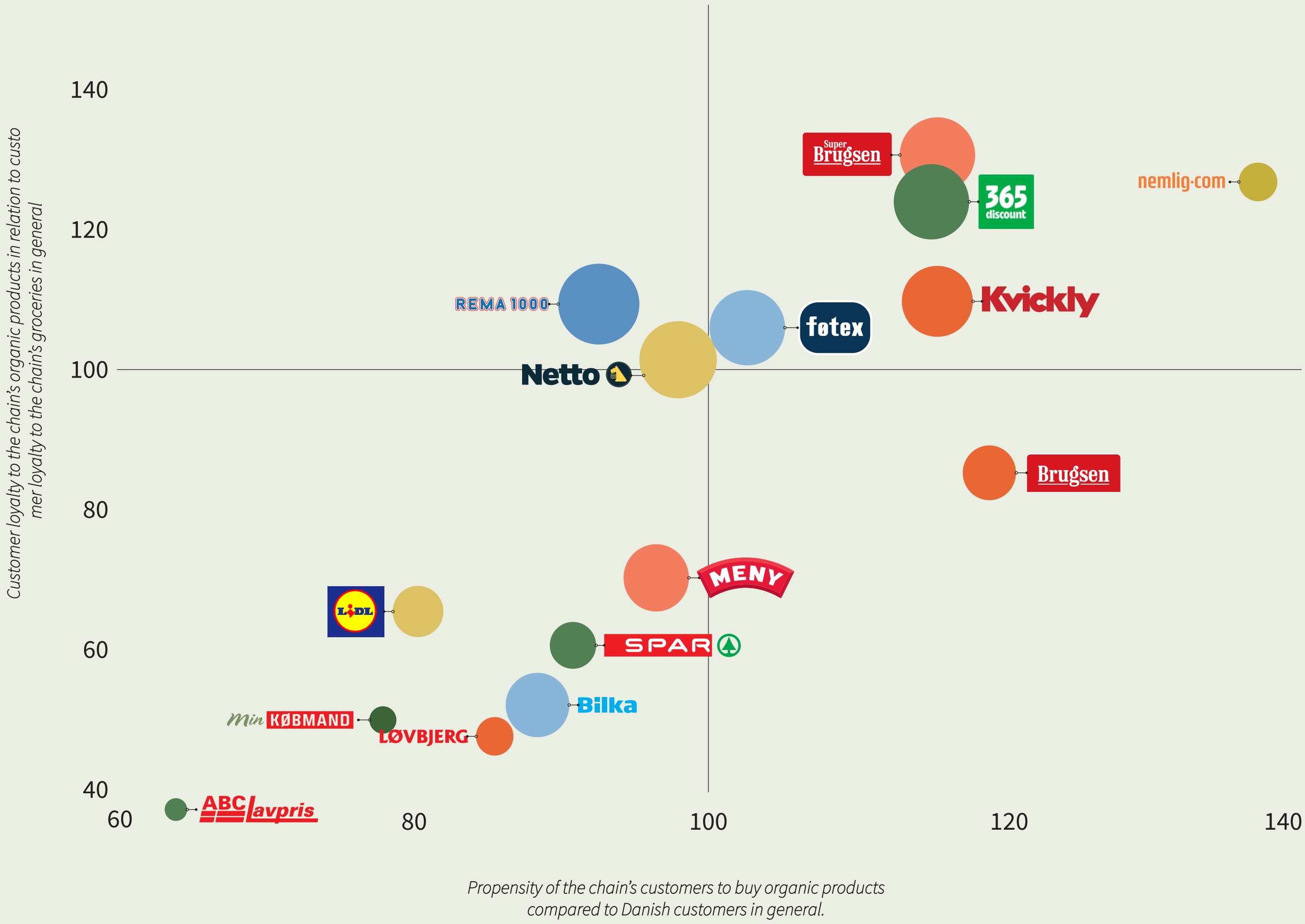
However, these chains have untapped potential that they could better utilise, for example by:

- Improving and expanding their organic range for their current and potential customers
- Improving their marketing in specials magazines, on the web and social media, and via other channels
- Making organic products more visible in their stores
- Explicitly telling their customers about the difference organic products make in relation to the green transition
- Inspiring customers to buy organic products tied to specific meals and eating situations

HOW TO READ THE FIGURE

The size of the bubble indicates the chain's potential, defined as the total purchases of organic products by the chain's customers, inside and outside the chain. The vertical axis indicates customer loyalty to the chain's organic products in relation to customer loyalty to the chain's groceries in general.

The horizontal axis shows how inclined the chain's customers are to buy organic products compared to Danish customers in general.



Source: Kauza shopper data

ORGANIC PRODUCTS IN SUPERMARKETS

RICHO BOSS
CHAIN DIRECTOR & CEO
AT MENY

HOW DOES MENY PLAN TO MAINTAIN AND INCREASE GROWTH IN ORGANIC PRODUCTS?
The organic segment remains an important priority for MENY and one of our key positions in relation to responsibility. We will further develop the organic segment through a broad and deep product range, as well as marketing, great offers and strong collaboration with suppliers.

WHAT NEW INITIATIVES DO YOU HAVE TO EXPAND YOUR ORGANIC RANGE?
We already have a wide range of organic products at several levels of the product ladder, which we are continuously expanding. Our new and biggest initiative is the acquisition of Aarstiderne – a brand that matches MENY on key values such as taste, culinary pleasure, freshness and inspiration. The aim of this is to consolidate MENY's position in the organic segment. In 2025, a 'shop in shop' concept featuring a selection of Aarstidernes products will be implemented in all 116 MENY stores – in fruit and vegetables and chilled and dry goods. Organic products are also strongly represented in our Danske Madskatte (Danish produce) concept, which will be adding another 250 products to the range.

HOW DOES MENY PLAN TO EXECUTE ITS STRATEGIC GOALS FOR THE CHAIN'S ORGANIC SHARE?
We continually tune our product range so we can offer customers a broad and deep range across categories. We also have the principle that there must always be organic products in our specials magazines. We will be doing a major newspaper insert with only organic products in August, as well as an insert with only Grøn Balance. Organic products are made visible to consumers in stores with 'organic' shelf labels, so they can easily find them.

Our 'Danish produce' concept features a number of organic products whose stories we communicate widely to the Danish population, both on the streets and via digital channels. As a new initiative, we are participating in the European Organic Summit being held in Copenhagen in August.

In addition to promoting our product range, we will participate in the various meetings on how the EU can achieve an organic share of 25% by 2030.

WHAT WILL THIS MEAN FOR YOUR SUPPLIER REQUIREMENTS?
During the hyperinflation years, we saw organic sales in the market generally stagnate and decline. To ensure growth, it is therefore essential to have competitive prices throughout the value chain, and suppliers are meeting this requirement. MENY also has a vision of developing Danish food culture. We therefore work closely with smaller suppliers, including organic suppliers, to develop products and offerings for consumers.

ANNE RAHBEK
CONCEPT MANAGER
AT ALMA

HOW DOES ALMA PLAN TO MAINTAIN AND INCREASE GROWTH IN ORGANIC PRODUCTS?
Whether the organic segment goes up or down, our goal is to develop and grow our organic sales. Organic produce is important to us and part of our strategy. This is clearly seen when we purchase goods. If we can get an organic product, we buy it rather than a conventional one. Organic products account for over 80% of sales. This is something we give priority to, and have signs about it throughout stores.

DOES ALMA HAVE INITIATIVES TO BROADEN AND DEEPEN ITS ORGANIC PRODUCT RANGE?
We have started by playing the hand we're dealt. Because we have to be realistic, and cannot simply revolutionise the market given our size. But we will gradually start to push for more organic choices and develop our own products.

HOW DOES ALMA PLAN TO EXECUTE ITS STRATEGIC GOALS FOR THE CHAIN'S ORGANIC SHARE?
The first step is to get as many organic products on the shelves as possible. Some products are hard to source, but we are making an effort. The major product groups naturally have the biggest impact, and organic versions of these are also easier to obtain. We have also increased our focus on sourcing local organic goods.

WHAT WILL THIS MEAN FOR YOUR SUPPLIER REQUIREMENTS?
We have to recognise that we are a supermarket that caters to modern society. A greater focus on convenience and ready-to-use products would be natural, but we also know this comes at a price. Even though we are at the fortunate end of the spectrum in terms of customers, there is still a limit to how expensive our products can be. The organic mindset is the most important thing to us, and that entails a responsible product range.

Customers are first greeted by fresh, seasonal produce and a recipe universe. We have laid out the store such that it supports the things we all need to do more of.

JEFF SALTER
COMMERCIAL DIRECTOR
AT COOP DENMARK

HOW DOES COOP PLAN TO MAINTAIN AND INCREASE GROWTH IN ORGANIC PRODUCTS?
Our priority is to ensure that organic products are accessible (on the shelves and affordable) when customers do their shopping. This means a continued focus on putting the right product range in all chains. We also need to boost organic sales in our own brands.
This includes Änglamark, for which we expect sales to increase as we introduce more Änglamark products in 365 discount. Finally, we need to leverage the momentum that the organic segment seems to be regaining to increase the depth of our organic range again, after a few years of declining sales and therefore declining supply.

DOES COOP HAVE NEW INITIATIVES TO BROADEN AND DEEPEN ITS ORGANIC PRODUCT RANGE?
As explained, we are currently looking at which categories need a broader organic product range than today in order to capitalise on growth.

HOW DOES COOP PLAN TO EXECUTE ITS STRATEGIC GOALS FOR THE CHAINS' ORGANIC SHARE?
We are currently reviewing our strategy, so it is difficult for me to answer at present. But it is important that the chains exploit their potential to sell organic products. This means, for example, that stores with a strong interest in organic products will get an even broader organic product range.

WHAT WILL THIS MEAN FOR YOUR SUPPLIER REQUIREMENTS?
A continued focus on innovation and on helping us identify products with untapped potential on the shelves. We will continue to focus on strong, long-term collaboration with a large handful of organic suppliers who have been supplying us for many years. These relationships have great value to us. So Coop will not be buying its own farmland to make organic produce for our stores. Our focus is on stronger collaboration with the many capable Danish organic producers.

ORGANIC PRODUCTS IN DISCOUNT SEGMENT

ANDERS RENÉ JENSEN
PURCHASING AND MARKETING DIRECTOR
REMA 1000

HOW DOES REMA 1000 PLAN TO INCREASE GROWTH IN ORGANIC PRODUCTS?
We will continue with our organic segments in our specials magazines, marketing on SoMe and work on the development of Gram Slot and its products. This includes continuing to invite consumers to Gram Slot to see how they work with organic produce.

DOES REMA 1000 HAVE NEW INITIATIVES TO EXPAND YOUR ORGANIC RANGE?
We continue to look at expanding the range where it makes sense. We really want to have organic products, but it is important that consumers want to buy them and that the products are relevant to customers.

HOW DOES REMA 1000 PLAN TO EXECUTE ITS STRATEGIC GOALS FOR THE CHAIN'S ORGANIC SHARE?
By maintaining our current focus – both in terms of product development and range expansion, and marketing.

WHAT WILL THIS MEAN FOR YOUR ORGANIC SUPPLIER REQUIREMENTS?
We set the same requirements as before – they have not changed.

KHALIL JEHYA TALEB
PURCHASING DIRECTOR
LIDL

HOW DOES LIDL PLAN TO INCREASE GROWTH IN ORGANIC PRODUCTS?
We will continue to work with our product range in all categories, focus on continual promotions based on organic products, and also more extensively involve our online platforms such as our app Lidl Plus.

DOES LIDL HAVE NEW INITIATIVES TO EXPAND YOUR ORGANIC RANGE?
We constantly work in depth with market data and interaction with sector organisations, and listen to our customers. We thereby do analysis to determine where our customers have preferences that we need to meet. We have worked with a number of sector organisations in recent years, whereby we have increased our focus and intensified product development through joint projects. This includes diversifying protein sources, with a focus on legumes and the plant-based segment. We also see a connection between these product areas and the organic segment.

HOW DOES LIDL PLAN TO EXECUTE ITS STRATEGIC GOALS FOR THE CHAIN'S ORGANIC SHARE?
Through product range expansion and promotional activities. Also by using national partners and colleagues abroad as a sounding board, with whom we can share knowledge and experiences related to organic products.

WHAT WILL THIS MEAN FOR YOUR ORGANIC SUPPLIER REQUIREMENTS?
That our organic suppliers can continue to count on Lidl as a serious and supportive partner, to promote organic products and increase market share.

We will expect them to focus on innovation and trends in the market, so we tap into the organic segment in those areas. We also want to help nudge consumers to buy more organic products.

Photo: Mai Tschjerning Simonsen

WANT TO JOIN THE CELEBRATION?
Visit our materials universe, where you can find materials and lots of inspiration here:

WWW.OKOLOGI.DK/Ø35

Ø LABEL CELEBRATES 35 YEARS

This year marks the 35th anniversary of the Ø label, and we can celebrate being the first nation in the world to establish a state-controlled organic label. A label that has since gained great support and a unique level of consumer awareness. But toasts and flag-waving are not enough at a time when we are still feeling the repercussions of the inflation crisis.

Organic Denmark intends to exploit the anniversary celebration to promote new awareness of the label and the values and qualities of organic produce, and thereby ensure that the organic segment gets back on the path to growth.

A visible celebration in grocery stores creates momentum. We know this from both the 25th and 30th anniversary celebrations. We know that a festive celebration combined with valuable messaging increases consumer preference and purchase intent in favour of organic products.

Organic Denmark launched an anniversary campaign in April 2025 that was visible in urban spaces and on digital platforms. We have also developed physical store materials for use wherever the store presents its organic products or has set aside an area to promote organic products.

The campaign is planned to run throughout 2025, and will be implemented together with actors from the entire organic value chain, who can freely choose the periods during which a celebration fits in with other campaigns.

RECOVERY WILL NOT HAPPEN BY ITSELF

Most professionals in the organic segment experienced a decline or stagnation during 2022 and 2023. There was actually a historic decline in the consumption of organic products among both 'super' and 'light' organic consumers.

Behavioural and trend research experts point out that consumers do not automatically return to previous consumption patterns following a crisis. A 'new normal' needs to be established, where consumers reflect carefully – especially in relation to food purchases.

Our focus on the Ø label anniversary makes the organic produce messages top-of-mind, relevant and valuable to consumers.

MESSAGING REINFORCES CONSUMER PURCHASES

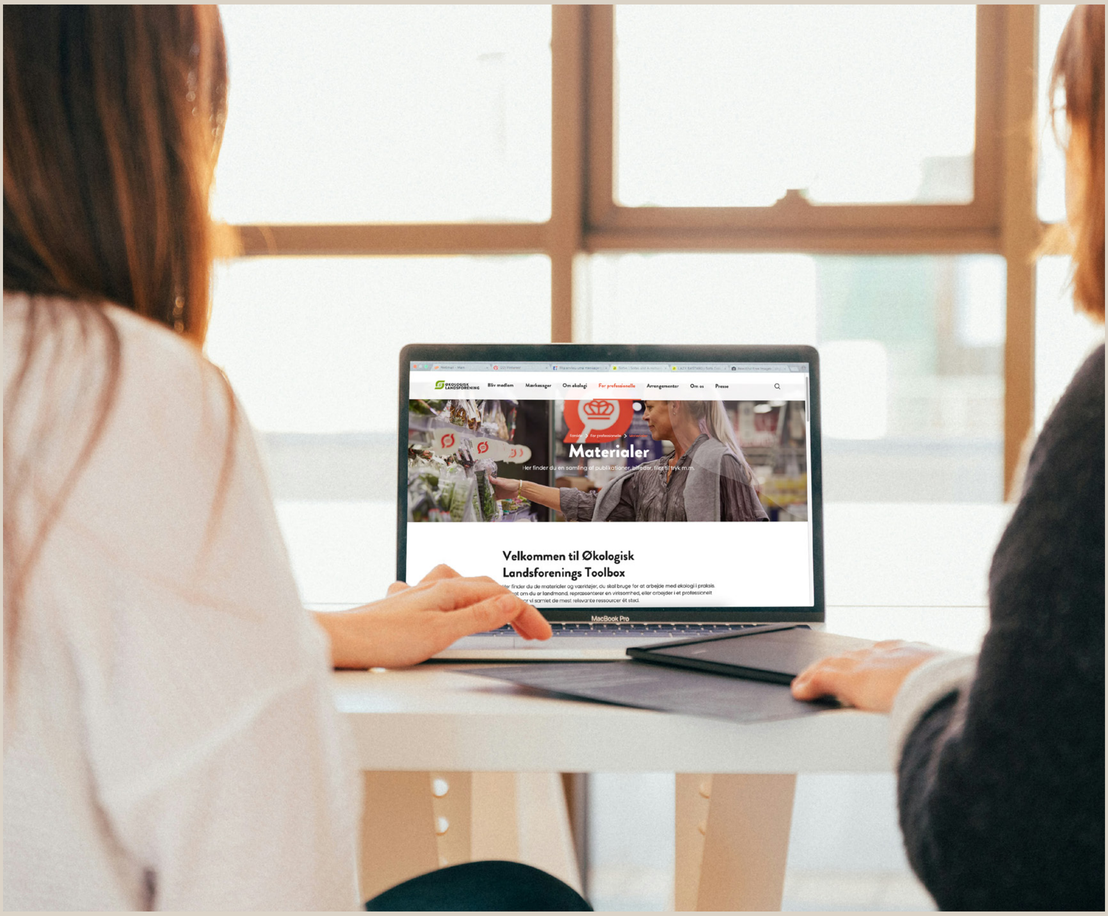
The campaign uses recognition and social proof to reinforce and renew the target group's positive attitudes towards organic products, by communicating the impact purchases of organic food by Danes over 35 years have had on people, livestock and the environment, and that this has resulted in Danes now being world leaders in organic produce.

The messaging focuses on the benefits of organic produce that Danes find most important, based on a survey conducted by Organic Denmark:

- You protect yourself and your family from pesticides
- You ensure pure and rich biodiversity
- You promote good animal welfare
- You protect our groundwater from pesticides

These four statements are used consistently throughout the promotion, from outdoor advertising and GoCards to TikTok videos and various physical merchandise and in-store materials.

BOOST ORGANIC SALES – FIND LOTS OF INSPIRATION IN OUR **FREE TOOLBOX**



Promotions, eco-messages and on-shelf visibility. There are many ways to boost sales of organic products, and many great stories to tell your customers.

If you want to ensure you tell the right story without too much embellishment, or just need new shelf labels, you can find what you are looking for in Organic Denmark's toolbox, which is overflowing with ready-to-print marketing materials.

You will also find inspiration for how to use the various elements in your store, on packaging or in your specials magazine.

The contents of the toolbox are free and may be used by anyone who sells or produces organic food.

Find the toolbox here, and inspiration to increase sales.

ORGANIC PRODUCE **CONSUMERS**

Danish consumers buy a lot of organic produce compared to the rest of the world, and in 2024, Denmark was the EU country with the largest organic market share. Statistics Denmark estimated organic food's share of total food sales in 2024 at 11.6%, but with large demographic variations.

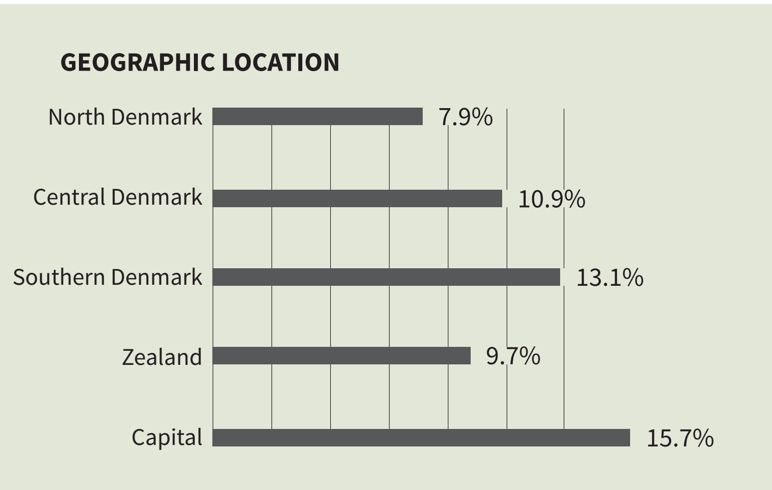
The figures below show how the demographic segments that spend the largest proportion of their grocery budget on organic products look in terms of age, geography, household size, and whether there are children in the household.

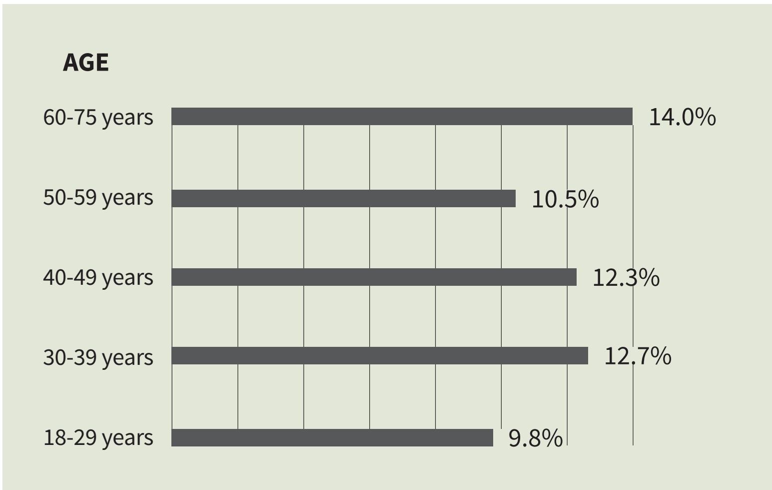
The perception that organic food is only sold in Copenhagen and Aarhus continues to be propagated. However, organic food consumption was far more widespread in 2024 than ever before. For example, Southern Denmark is the region with the second highest consumption after Copenhagen.

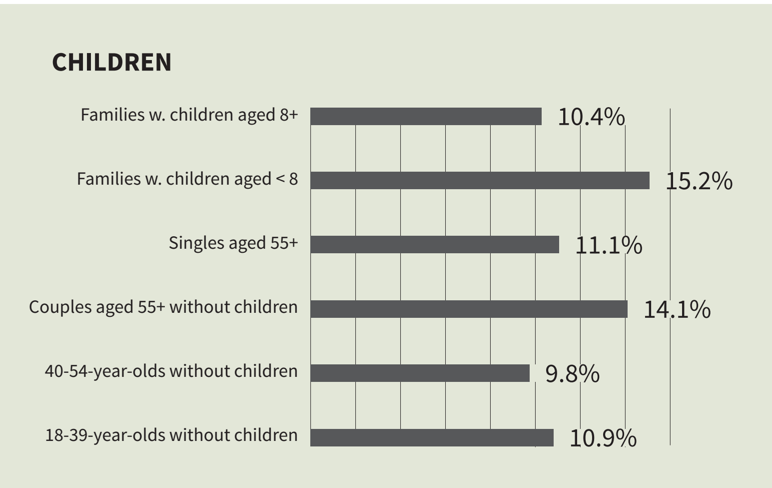
Broken down by family type, families with children under eight and couples aged 55+ have the highest consumption of organic food. In 2024, 69.6% of Danes bought organic food every week.

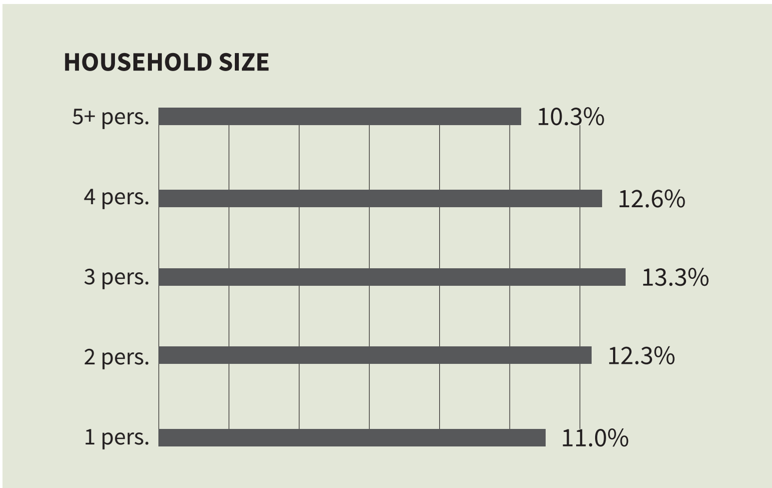
Families have been hard pressed during the inflation years, but they returned to organic products during the second half of 2024. Throughout the period of high inflation and price focus, couples aged 55+ maintained – and in some periods increased – their consumption of organic food (in value terms).

ORGANIC SHARE OF FOOD PRODUCT SALES (VALUE) IN 2024









Source: Kauza shopper data

SUPER AND HEAVY ORGANIC CONSUMERS ARE ATTRACTIVE CUSTOMERS

There is great variation among Danish consumers in how much of their food budget they spend on organic food.

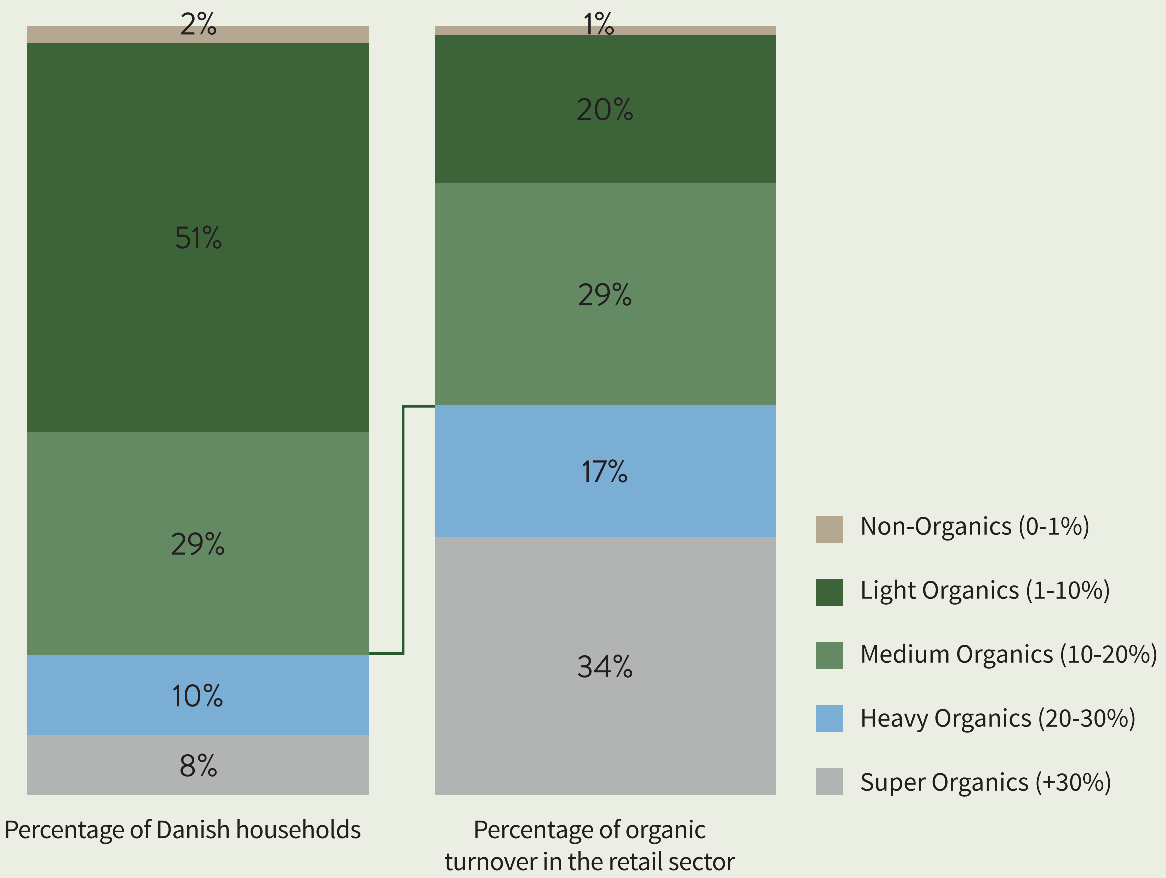
Consumers who spend more than 30% of their food budget on organic food are called Super Organics. In 2024, Super Organics accounted for 8% of organic consumers and 34% of organic sales.

Together, Super and Heavy Organic consumers accounted for 18% of organic consumers in 2024, but 41% of organic sales.

These two consumer groups are very attractive customers for grocery retailers, and Kauza's shopper data provides deeper insight into these organic consumers, who spend more money on groceries than Danes do on average. Between April 2024 and March 2025, the group of 'couples aged 55+' accounted for 33% of organic sales, and 'families with children aged <8' for 20% of organic sales. Many grocery chains would therefore be well-advised to take a closer look at the 'silver segment'.

The latest figures from Q1 2025 show that Super Organics are typically 'families with children aged <8' living in the Greater Copenhagen area.There are also big differences in which behavioural segments shop in which chains, but it is important that grocery chains and organic producers are conscious of which consumer segments they are targeting in their communication, product range and product development in order to increase organic sales.

BEHAVIOURAL SEGMENTS' SHARE OF DANISH HOUSEHOLDS AND ORGANIC SALES IN 2024

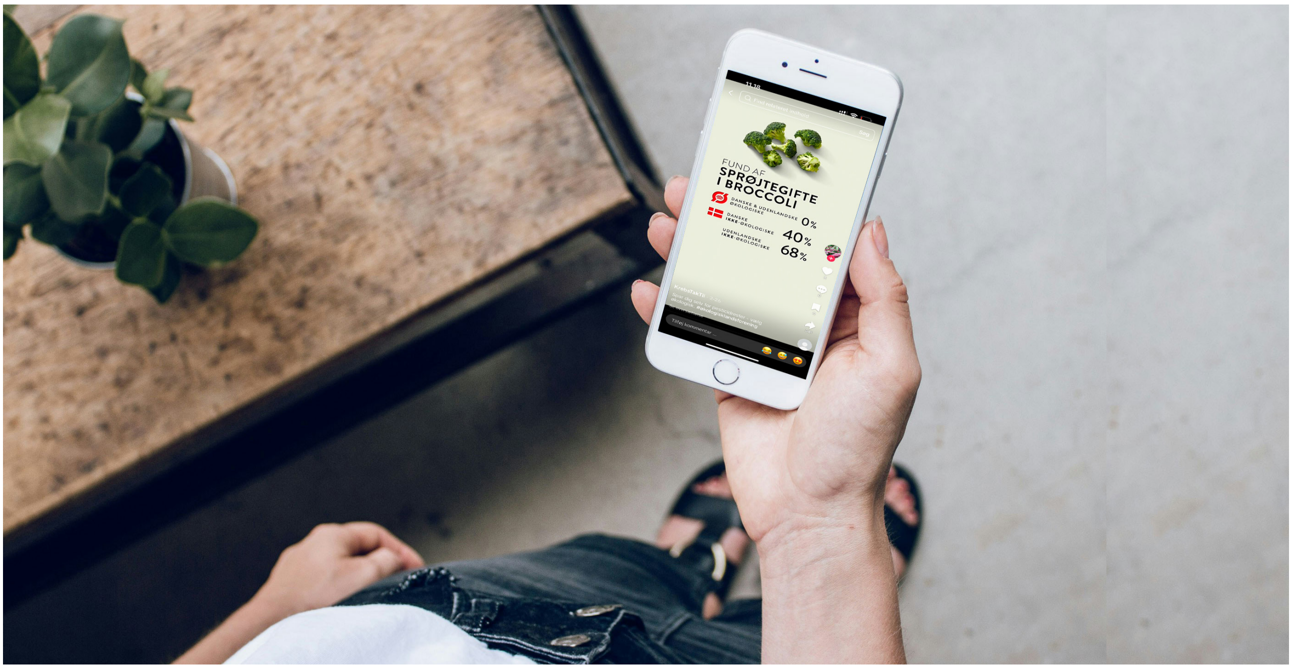


Source: Kauza shopper data

FUTURE GROCERS WILL BE FOUND ON **SOCIAL MEDIA**

They learn on TikTok and find inspiration on Instagram, and the purchase journey has to be easy and short. This is what young people want – and also the not so young. Customers in the not-too-distant future will expect you, your product or your store to be relevant and present on social media.

VIVIENNE KALLMEYER
COMMUNICATIONS CONSULTANT AND
PROJECT MANAGER AT ORGANIC DENMARK



Very quickly over the coming years (and already happening now), the way we shop for food or get inspiration for dinner will change markedly. Young new customers and consumers have a very different approach to advertising and promotions than the rest of the population.

"First of all, their attention span is very low on social media and they are used to short-form content, where they can instantly decode whether the content creates value for them. They skip and move on quickly if they cannot decode whether the content is for them. So if you want to ensure your product gets their attention, you simply have to cater to their interests," says Frederik Nonnemann, Branded Content Director at Dentsu.
"Half of young people also use social media as a search engine, so SEO optimisation is just as important on social media as it is on Google."

According to a number of analyses compiled by Dentsu, Generation Z youth are exposed to up to 189 items of content about food on social media each week. The analyses also show that 84% of young people in Generation Z have tried out a food experiment they have seen on TikTok or the like, and 93% have looked for food inspiration on social media in the past month.

"Businesses and retailers need to be ready to optimise their sales strategies so that their content and advertising fits and adds value to the media they deliver on. By 2027, 80% of media revenue will be on algorithm-driven media, and the focus will be more on affinity and trust and less on classic aggressive advertising," he notes.

This requires companies to be able to manage their data and monitor the performance of the content they distribute via social media. TikTok has an integrated Creator Search Insight Tool, which guides the user in how to build content on the medium. It is a kind of handbook, that also provides the data the company needs and assistance in creating content that is relevant to the platform.

"There's really no excuse not to get started. The tools in TikTok, for example, make it easy to see the effect, and you basically only need some good ideas, a mobile phone and a cooktop to get started," Frederik Nonnemann says with a wink.

"Meals and food are also a great category to work with. Everyone needs food and is interested in it at some level."

The tools are available. The equipment is something most people already have. But how can your business create content that connects with your customers and gives them something of value?

"We're all drawn to people who have charisma and are skilled at something. You simply have to take the plunge and actively use data to see what works for the target group," he says.

Some companies pay influencers to present their products in a meaningful or completely new context. Others hire lesser-known content creators to create content on the companies' own platforms. No matter how you approach the task, it is important to keep in mind that, unlike in the past, it is the social media users that create trends – not necessarily the various brands.

So when a cottage cheese recipe goes viral or Dubai chocolate becomes a hit, it is because one or more people have presented the product in a trustworthy, useful and delicious way. And if your brand is smart and agile, you can capitalise on these trends.

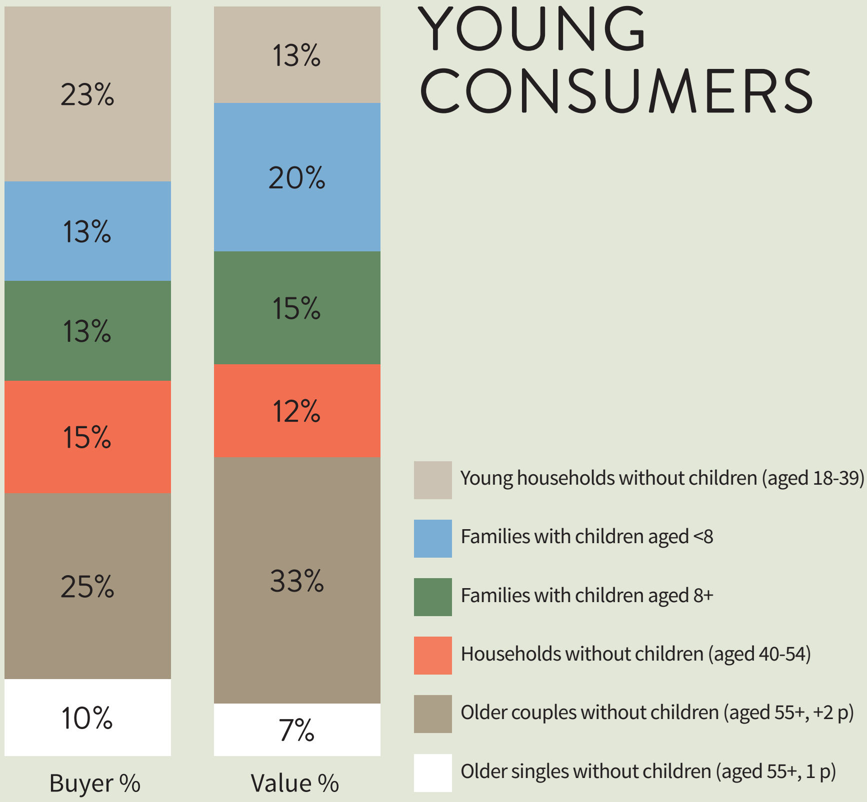
"Ultimately, you have to understand the consumers and their communities and be able to apply the instrumental properties of the platforms," says Frederik Nonnemann.

YOUNG CONSUMERS

Young households without children account for a relatively small share of grocery sales value. They shop less often than the average and buy fewer items and at a lower price point.

When they shop, they are overrepresented in sales of frozen foods and beverages, and are more likely to buy ready meals and various grain and lentil products than the average consumer. Despite their relatively low consumption, they are more concerned than the average consumer about the store's image, sustainability focus and food waste management. They also give priority to quality.

Young households without children are staple customers, but also price-conscious. If you want to appeal to them, sustainability is an important focus, as is quality at the right price.



Source: Kauza, MAT March 2025

BUILD **CUSTOMER LOYALTY** BASED ON A MEAL MINDSET

Danes love shopping for groceries in physical stores, but are not particularly loyal to a specific chain or store. This trend has intensified following the cost of living crisis. But it is possible to do things differently and build loyalty – and take advantage of the fact that grocery retailers are not yet as threatened by digital shopping as others in the retail sector.

VIVIENNE KALLMEYER
COMMUNICATIONS CONSULTANT AND
PROJECT MANAGER AT ORGANIC DENMARK

“Organic produce can be one of the tools used to retain and attract customers, because a large part of the organic segment has other buying motives and is conscious of factors beyond price and specials. But it requires a break with the category mindset,” says Birgitte Jørgensen, Market Director, Retail at Organic Denmark.

“Such a paradigm shift means that grocery retailers have to see themselves as the bridge between the suppliers selling ingredients, and the customers who go to the store to buy meals.”

It is important for grocery retailers to focus on this, if they

want to form closer ties with organic consumers. It has to be possible for organic customers to shop for all eating situations, in order to build stronger loyalty. This applies both to customers who are more focused on affordable organic products, and those who are more connoisseurs. Grocery retailers must therefore work to rebuild both a broad and deep organic range with multiple value positions. Each chain must also look across their range, and ensure that customers can actually shop for a full meal without having to go to several different grocery stores.

The range of organic products has been in sharp decline over the past few years. This is clearly reflected in the product selection, and is underscored by the figures from Kauza's shopper data, showing a 13% decrease in organic EANs during Q1 2025.

"Consumers can clearly see this when they shop. Empty shelves, or in the worst case, being unable to get hold of organic variants of all the ingredients for your planned meal, can make even the most loyal organic consumers shop around or buy the conventional variant," she says.

"We encourage grocery retailers to raise their sights when selecting their full organic range, and define the requirements to be set for purchasers. Can customers find organic ingredients for some of the most common dinner dishes?" notes Birgitte Jørgensen. She adds that Madkulturen's survey of the most common Danish evening meals can be used as inspiration.

It is also important that the organic product range and composition meet organic consumers' demands for greener and more climate-friendly ingredients. There is also a growing demand for convenience products among organic consumers.

"Organic consumers also seek inspiration, and they want their motivation to make conscious food choices and make a difference through their consumption, to be supported."

Consumers are keenly aware of price and on the lookout for bargains. It has become a national pastime to try to save money on groceries by buying cheaper items, chasing specials and shopping more at the discount chains, all of which can expect significant growth.

Danish consumption is segmented between low-cost goods and quality products that provide a sense of everyday luxury. High-profile supermarkets must remember to set the stage for this, while keeping prices competitive for the price-conscious consumer. Danes are also busy again. They need guidance and clear navigation in the store, and do not want to waste time queueing. And while consumers are extremely price-focused on most shopping trips, they are still ready for (healthy) convenience products that can simplify and speed up meal preparation.

Extra effort must be made in order to avoid regressing, and in addition to a well-documented review of the key trends in the Danish grocery retail sector, this report contains several ideas and suggestions for what you can do to succeed in these challenging times.

"Remember that 86% of Danes prefer to shop for groceries in physical stores, and that most of your customers can be influenced to buy once they are in the store. But a new approach is needed, as customers have become less loyal and are constantly looking for better prices and experiences," says Birgitte Jørgensen.

NEW ANALYSIS:

SILVER SEGMENT IS FOOD INDUSTRY'S BIGGEST GROWTH OPPORTUNITY – AND BLIND SPOT

BY: JOHANNE LA COUR
STRATEGY & INSIGHT MANAGER,
DENTSU

A new analysis from dentsu media and marketing company takes a closer look at consumers aged 50-99+ years – what drives their food choices and what does it take to bring organic produce to the table. The first step is to retire prejudice.

The global population is ageing – and Denmark is no exception. The silver segment – consumers aged 50 to 99+ – thus represents a growing percentage of the population. They have the largest disposable income, and are increasingly driving organic sales. Yet they are often overlooked in favour of more traditional target groups such as families when food brands plan promotions and marketing strategies.

NUMBERS SPEAK FOR THEMSELVES

- Only 15% of brands have a strategy that addresses the silver segment
- Less than 10% of marketing budgets target the silver segment
- Less than 1% of new food products are developed for people over 50

Prejudice gives us FOMO – Fear Of Marketing Older. Many assume that the silver segment does not spend any money, is not digital, is not influenced by marketing – and scares off younger target groups. There is also the persistent belief that their lifetime customer value is too low to invest in. But the real problem is that we know far too little.

The silver segment is the least studied segment in consumer research – despite its size and importance. A brand new consumer study from dentsu media and marketing company delves into who the silver segment is today and who they will be in the future. As consumers and as media users. The study also offers new perspectives on how to unlock the huge potential of the silver segment. This article gives you a sneak peak at some of the study's many interesting insights.

FOOD IS THE MEANS TO THE GOOD LIFE

For the silver segment, the good life is about freedom – the freedom to make your own decisions about your time, your body and your fridge. Health plays a key role here.

According to the DaneAge Association (Ældre Sagen), 79% of the segment feel that they are in good health. But illness is a major concern – 7 out of 10 worry about getting sick, and almost half fear becoming dependent on others for help.

It is therefore not only the desire but also the intent to live longer and live well – physically and mentally – that makes health a key driver in the silver segment's food choices. Interest in nutrition and quality ingredients increases with age, and health is one of the main reasons many in the silver segment choose organic products. This represents an unexploited potential for food brands: How can we help people eat their way to good health – throughout life?

DINNER TABLE CHOICES ARE NOT DRIVEN BY AGE

We are used to dividing life into phases when we segment into: children, tweens, teens and young adults. But people over 50 are often reduced to one homogenous group: 'the aged'. This is not just imprecise, it hinders innovation, relevance and effective marketing.

Unlocking the potential of the silver segment requires innovation and communication based on their needs, not just their year of birth. Age can give us insight into the general nature of the target groups in the silver segment, but does not necessarily tell us what is happening in their lives right now – or what drives their dinner table choices.

Stereotypes are of no use. The silver segment is not what it used to be. Many are active people with busy lives – assisting with grandchildren, providing care, staying in the workforce longer, living new dreams, adjusting to the loss of their life partner, or finding new communities. These are complex lives – with complex needs.

This is where convenience products become vital. Not as fast food, but as intelligent self-help: Solutions that make it easy to eat healthy, stay independent and take care of your health – even on days when you do not have the energy or motivation.

Would you like to win over the silver segment? Then listen to everyday life. See the person. And bridge the gap between needs and organic produce on the table.

The term 'silver segment' derives from 'silver economy', a term used to describe the growing market for 50+ consumers. The silver segment covers consumers aged 50 to 99+ years, This is a huge age span that encompasses a wide variety of life situations. Dentsu's consumer analysis therefore divides the segment into three target groups:

- **Mature adults (aged 50-69):** Still working, digitally savvy and financially strong.
- **Seniors (aged 70-84):** Early retirees or still working, with active family life and leisure time.
- **Elderly (aged 85-99+):** Still independent or in increasing need of support and care – with widely varying needs and life conditions.

ORGANIC BUYING PATTERNS

There are wide variations in the buying patterns of organic consumers – overall, and within each product group and type.

If you arrange the organic consumers in a long line, as in the graph below, you can clearly see how long the organic consumer 'tail' is. These figures from Kauza's shopper data (MAT Sep 2024) show that only 9% of consumers have an organic share greater than 30%, while only 2% have an organic share below 1%.

To raise the total organic market, it is necessary to increase the consumption of both the medium and light organics groups, as they make up the majority of consumers. These consumers must therefore be encouraged to buy organic in more categories and more often. This can be done by influencing them at the moment of purchase, by clearly stating the benefits of organic food, such as the absence of synthetic pesticide residues, good animal welfare and clean drinking water.

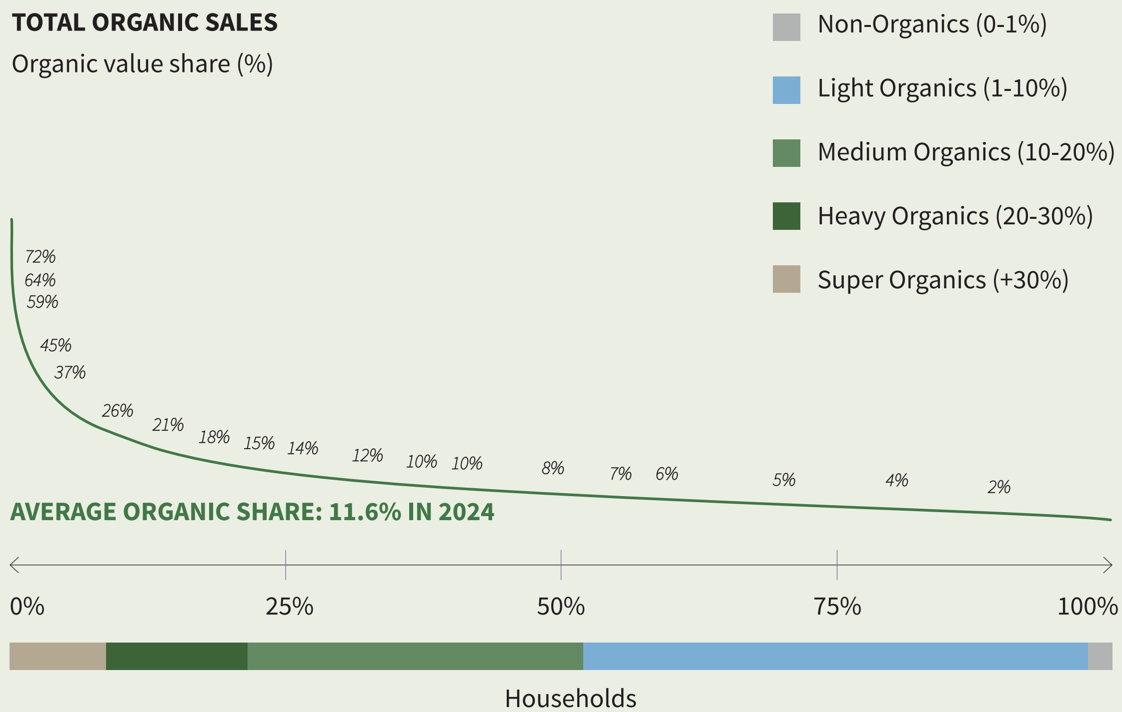
The buying patterns for organic lemons and organic milk show that there are wide variations in how loyal organic consumers are.

In relation to lemons, 56% of lemon shoppers always buy organic lemons, while 19% never buy organic lemons. Consumers are generally in favour of organic lemons, so grocery retailers should consider whether it is necessary to have both regular and unsprayed conventional lemons in their range.

The buying pattern for organic milk is very different. This may seem surprising, as milk accounts for a large share of organic sales. Only 5% of milk shoppers always buy organic milk, while 85% shop around and buy organic milk occasionally. This may be because there is a large price gap between the cheapest conventional milk variants and organic milk. But it could also be because the organic messaging about good animal welfare is not presented clearly enough at the point of purchase.

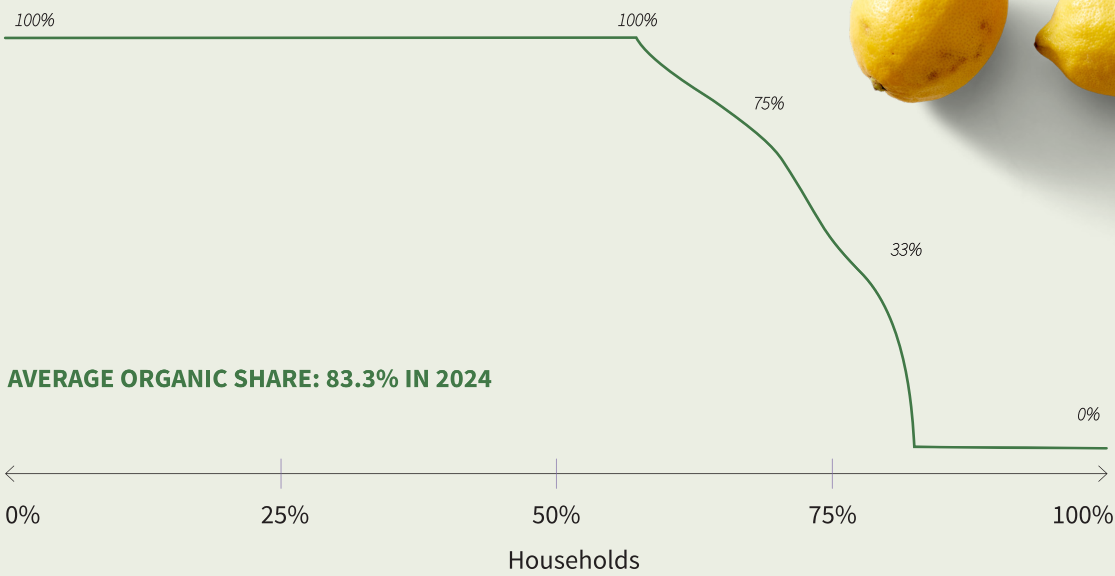
TOTAL ORGANIC SALES

Organic value share (%)



Source: Kauza shopper data

ORGANIC LEMONS
Organic value share (%)



Source: Kauza shopper data

ORGANIC MILK
Organic value share (%)

Source: Kauza shopper data

ORGANIC PRODUCE HAS A BIGGER IMPACT THAN YOU REALISE

BY: TINE JASPER
CEO
MADBUREAUET

Denmark has the highest proportion of organic food in the grocery sector in the EU, and 9 out of 10 Danes trust the Ø label. The red label not only represents the absence of pesticides and fertilisers – it stands for trust, transparency and a holistic approach in which animal welfare, the environment and food safety go hand in hand.

When you choose organic, you choose food without pesticide residues, better lives for livestock and more space for nature and life in the landscape. You are supporting a form of agriculture that works with – not against – nature. In other words, choosing organic is a simple way to make a real difference in daily life.

But the perception of the organic mindset as progressive and forward-thinking may have stagnated a little – and lost momentum in relation to the many strong agendas shaping the world. For organic produce to continue to make a difference and be seen as relevant, it must therefore continue to evolve – and find its voice in current issues where it makes sense. This could be, for example, in relation to climate footprint, local production, regenerative agriculture, social responsibility or stronger ties between rural and urban areas. For many people, sustainability today is not just about how we produce, but what that production contributes – to the climate, biodiversity, society and our sense of community.

Organic produce has a lot to offer here. Organic farmers are already experimenting with solutions such as carbon sequestration, climate-positive farming and rewilding. Many work closely with local players, selling direct from the farm and inviting consumers inside. This builds bridges between rural and urban areas – and relationships across geography and lifestyles.

That is why the narrative needs to be developed, to make it clearer how organic produce leads to better animal welfare, freedom from pesticides and care for nature. The organic mindset is part of a larger movement – and a promise that agriculture can and must play a positive role in a changing world.

FIVE ANSWERS TO QUESTIONS FROM COLLEAGUES, CUSTOMERS, NEIGHBOURS, FAMILY MEMBERS AND OTHERS AS TO:

WHY SHOULD I CHOOSE ORGANIC?

” Organic produce is your guarantee of food without pesticides – and a better life for livestock. It is the easiest choice if you want to make a difference in daily life.

” When you choose organic you support farmers who work with nature – not against it. It is about balance, consideration and respect for life around us.

” The Ø label stands for more than just pure food – it stands for trust, naturalness and addressing some of our common challenges.

” Organic farming builds bridges between urban and rural areas – local produce, openness and direct contact between those who produce and those who eat forges closer ties.

” Organic farming is part of the solution. For example, organic farming is already leading the way in terms of more space for nature and biodiversity – and there are areas where organic farming is better for the climate.

ORGANIC SEGMENT GAINING GROUND IN **FOODSERVICE**

Organic foods are being increasingly used in foodservice, with sales increasing by 13% from DKK 3.0 billion in 2022 to DKK 3.4 billion in 2023. Organic market share has thus increased to 14%, according to the latest figures from Statistics Denmark.

"Organic produce has been doing very well in foodservice for a long time, and the latest increase shows it is setting and maintaining a direction. This is because organic produce is more than just ingredients. You get so much more. You get clean drinking water free of pesticides, more biodiversity and better animal welfare. You get more fruit and vegetables, less meat and thus a smaller climate impact," says Torben Blok, Market Director, Foodservice at Organic Denmark.

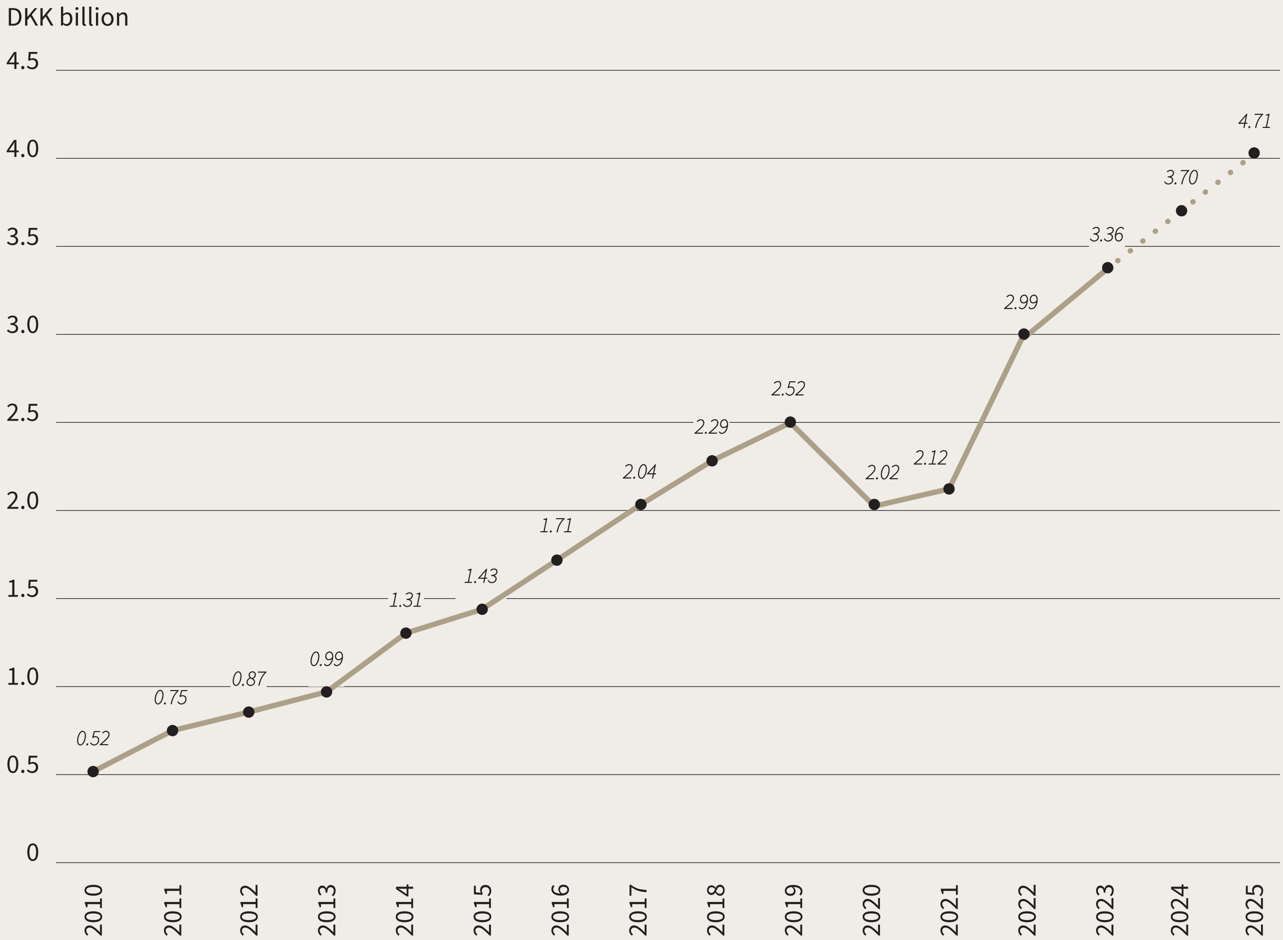
Organic products account for 33% of total dairy and egg sales, while organic fruit and vegetables account for 24%. Conversely, organic meat and fish account for just 3% of sales in this product group, and frozen food accounts for 6%.

"There is potential to work with organic produce in all categories. Dairy, eggs, fruit and vegetables are some of the product groups where the organic segment has a strong position, while there is development potential in the categories with a small market share," says Torben Blok.

Public sector kitchens, in particular, are contributing to the growth. Organic products accounted for 32% of the total in this segment. Canteens in public sector workplaces had a share of 23%, while the figure was 19% for canteens in private sector workplaces. The lowest organic share was seen in hotels, restaurants etc. at 9% of total sales. The share has increased from 2022 to 2023 in all groups.

"This increase signals that public and private sector canteens are increasingly recognising that more Danes want healthy meals made from pure ingredients. That there are more kitchens that understand the value creation that happens from farmer to kitchen to table."

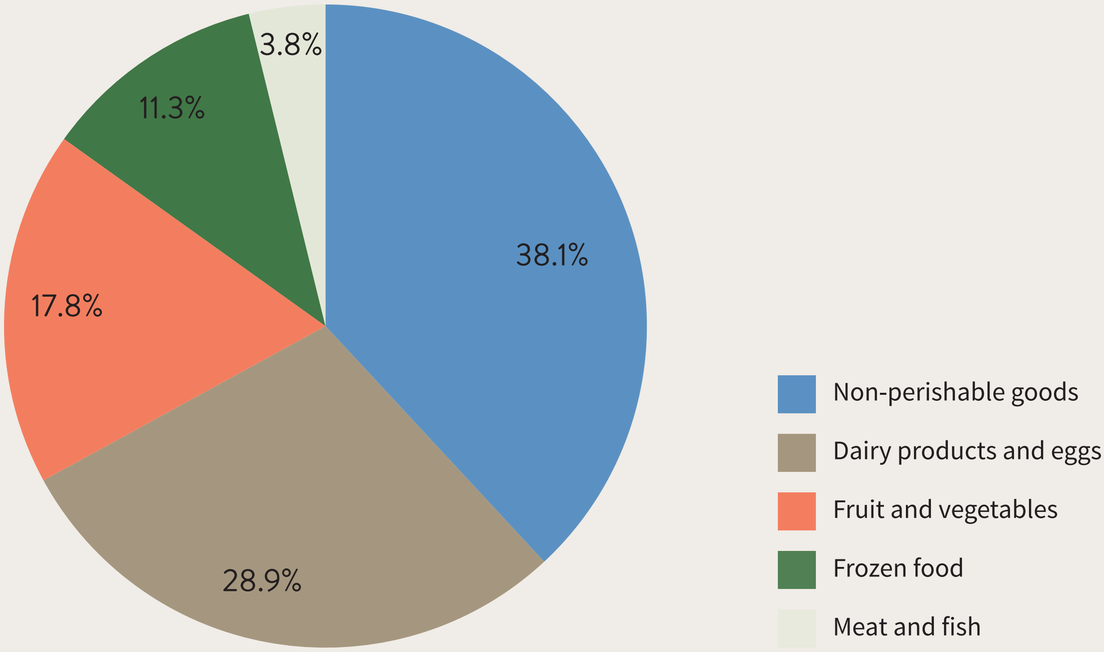
ORGANIC SALES IN FOODSERVICE 2010-2025



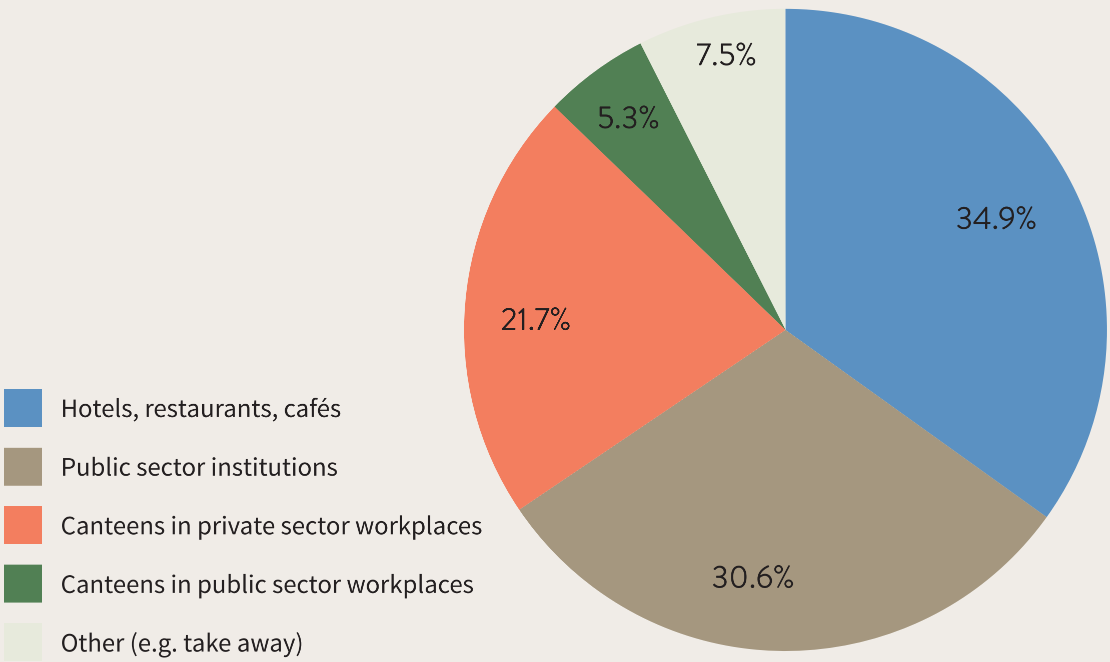
Source: 2010-2023 Statistics Denmark. 2024-2025 estimates by Organic Denmark

TRENDS IN FOODSERVICE

ORGANIC SALES BY PRODUCT GROUP – 2023



ORGANIC PRODUCT SALES BY CHANNEL – 2023



Source: Statistics Denmark

ORGANIC **EXPORT MARKET**

Organic food exports rose by 4% from DKK 3.4 billion in 2022 to DKK 3.5 billion in 2023. Imports of organic products fell by 4% in 2023. This was the first drop in imports seen in 20 years, according to the latest figures from Statistics Denmark.

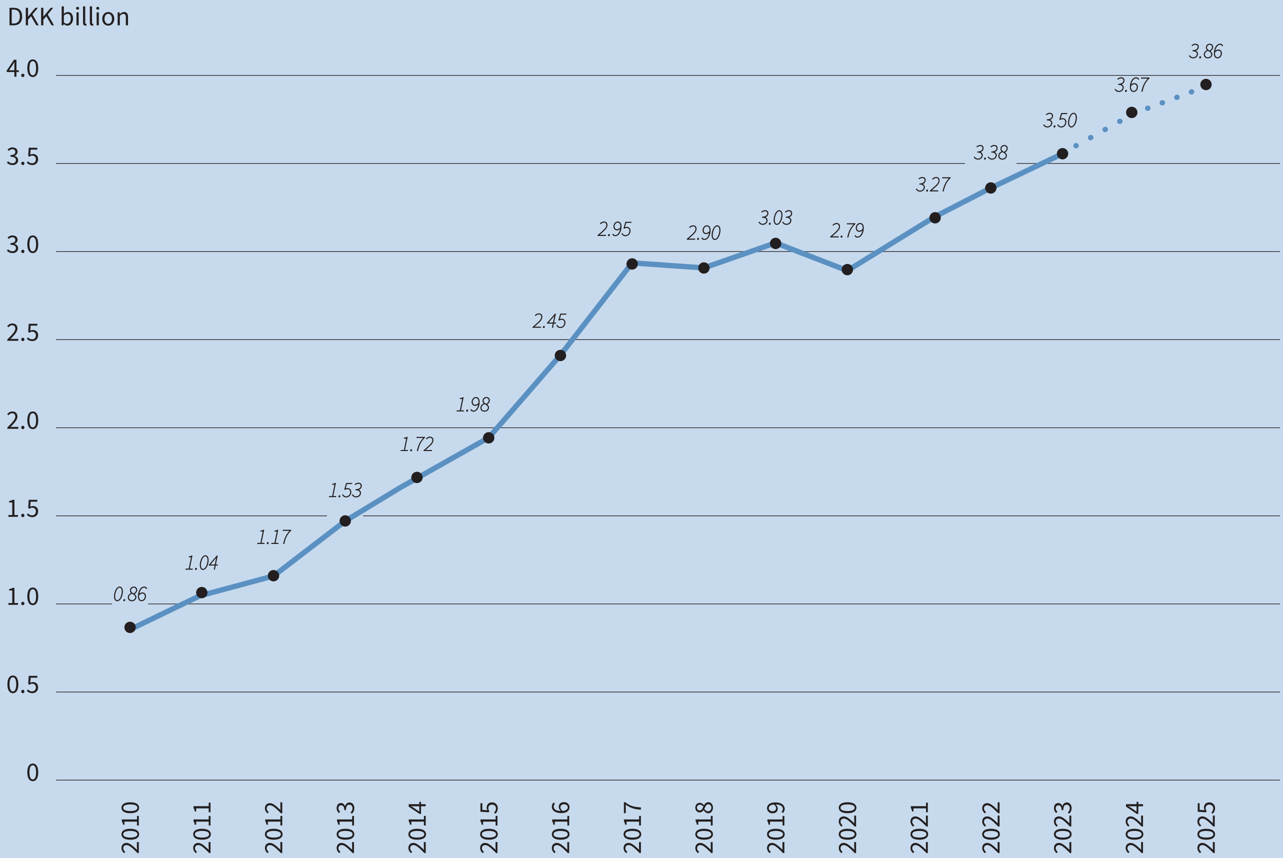
“The rise in total organic exports shows that customers abroad have great confidence in Danish products, and that our companies produce high-quality products,” says Dennis Hvam, International Market Director at Organic Denmark.

Dairy products still remain Denmark’s largest export category, but other beverages are slowly catching up with milk, cheese and yogurt. The beverage category includes plant-based beverages, precisely the type of product that is responsible for the impressive 39% increase from 2022 to 2023. Organic food imports, conversely, fell by 4%, and this is the first time this has happened in 20 years. It is especially beverages, animal feed and sugar that Danes are sourcing less from abroad.

“Organic exports face interesting opportunities, especially in Central Europe.”

Germany, Austria and Switzerland are seeing increasing demand for organic products. Germany is seeing a greater organic focus among retailers and discount chains, making organic produce more accessible to consumers and the product range broader. Yet even though the retail and discount segments are taking organic market share, organic chains are maintaining their sales, such that the total market is growing.

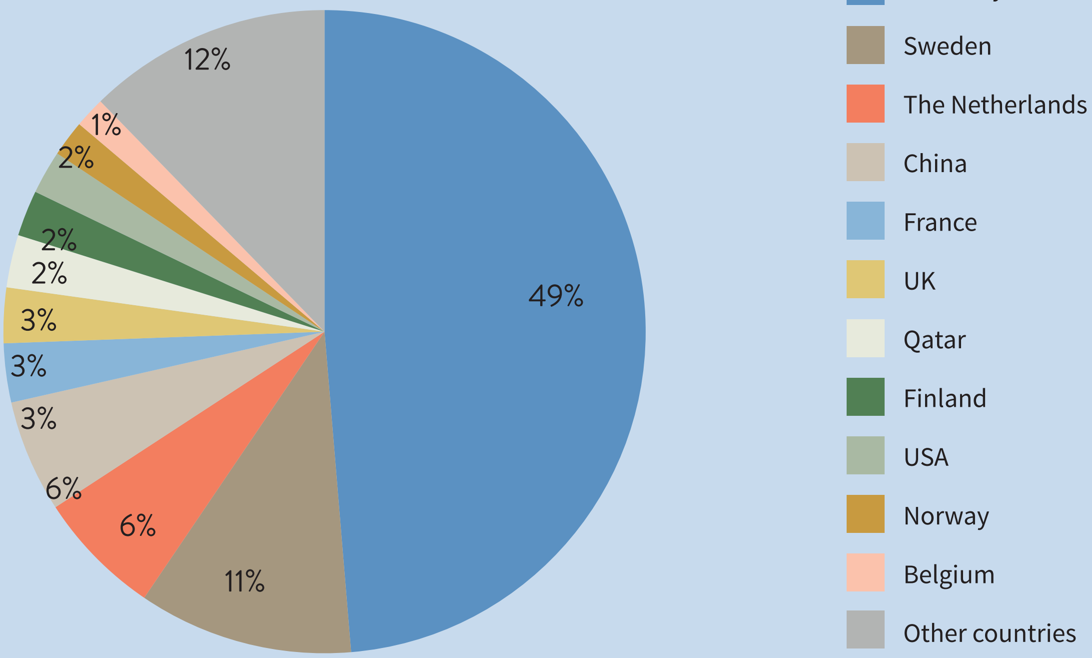
ORGANIC EXPORTS 2010-2025



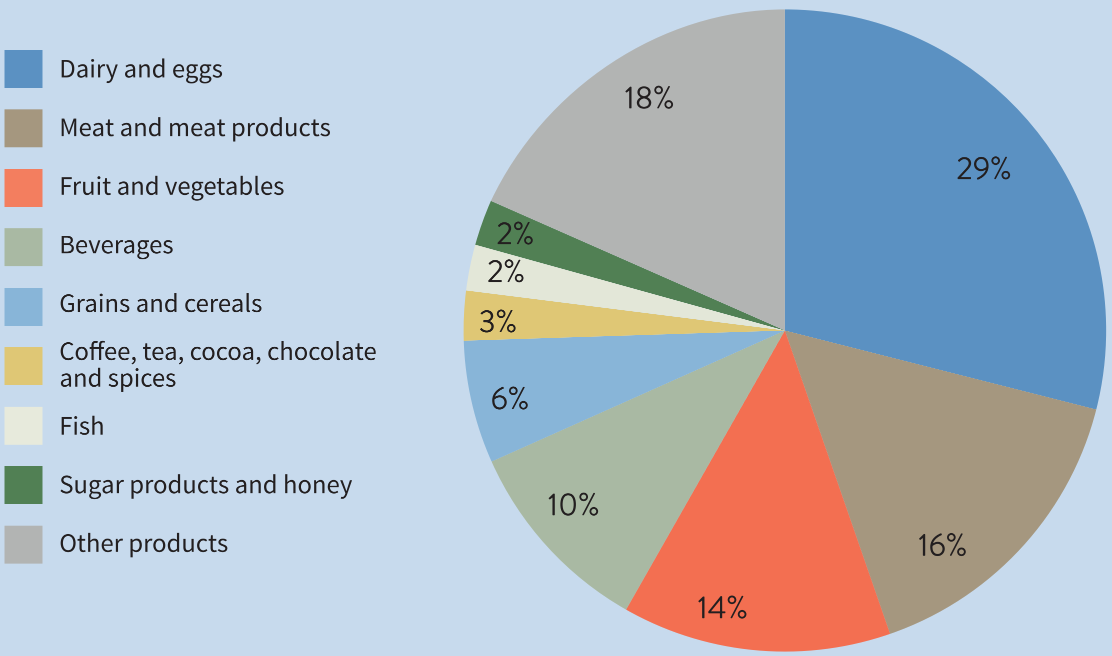
Source: 2010-2023 Statistics Denmark. 2024-2025 estimates by Organic Denmark

TREND IN EXPORTS OF ORGANIC PRODUCTS

ORGANIC EXPORTS BY COUNTRY – 2023



ORGANIC EXPORTS BY PRODUCT GROUP – 2023



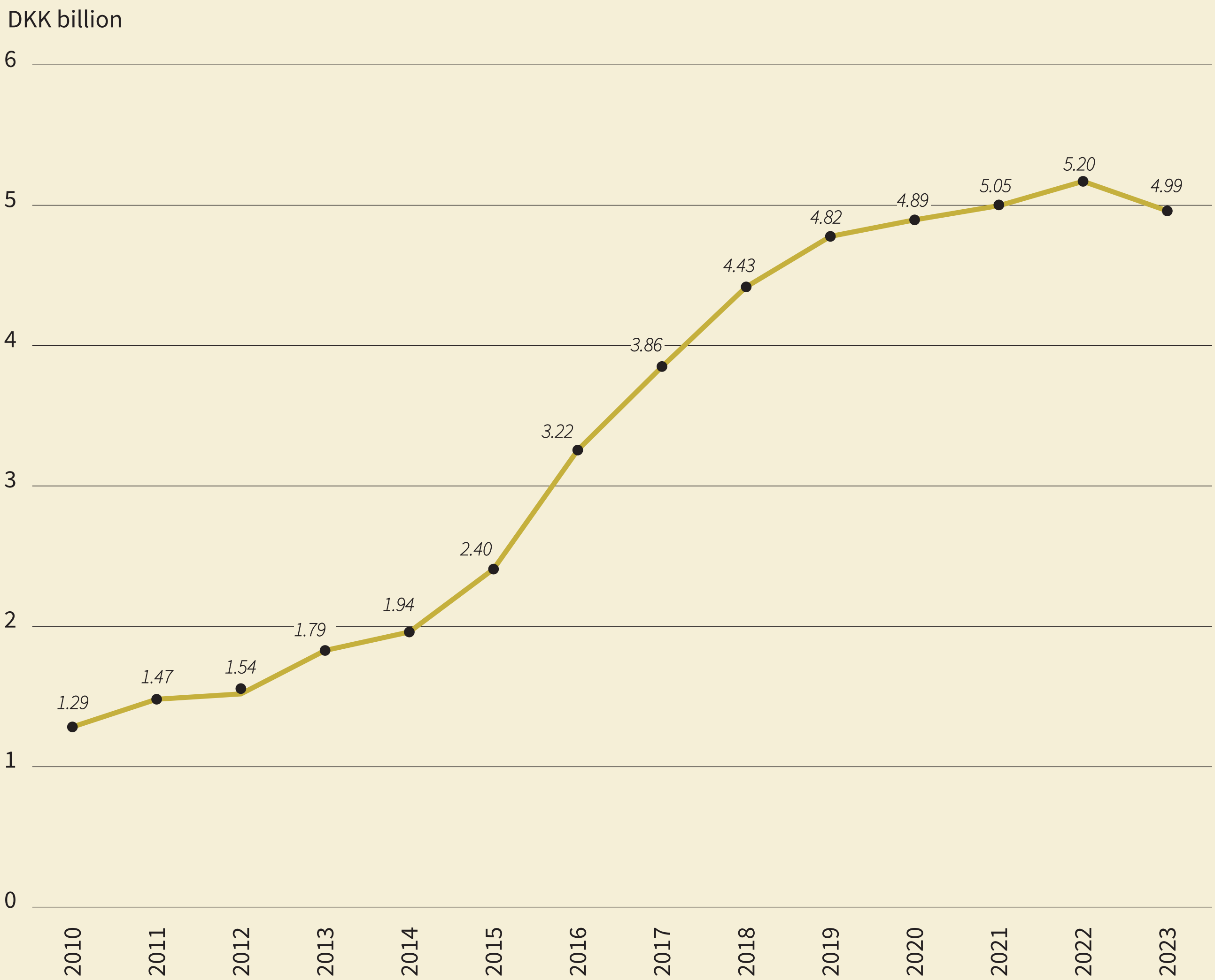
Source: Statistics Denmark

ORGANIC FOOD **IMPORTS**

Organic food imports fell slightly in 2023, returning to the 2021 level. In 2023, imports of fruit and vegetables and animal feed accounted for 50% in value terms. Imports from Spain, Germany, the Netherlands and Italy account for 58% in total, and these shares are very stable. By far the largest category in imports was fruit and vegetables. This is in part because there are a number of products that we cannot produce locally in Denmark, such as bananas and lemons. Kauza shopper data shows that Danish fruit and vegetables are more popular in season, and that the average weekly value share in grocery retail was 41% in 2023/2024.

It is striking that imports have dropped. Part of the explanation is that we need less feed given the drop in organic milk production. But the numbers also reflect the fact that we are sourcing less wine from Southern Europe and cutting back on sugar products.

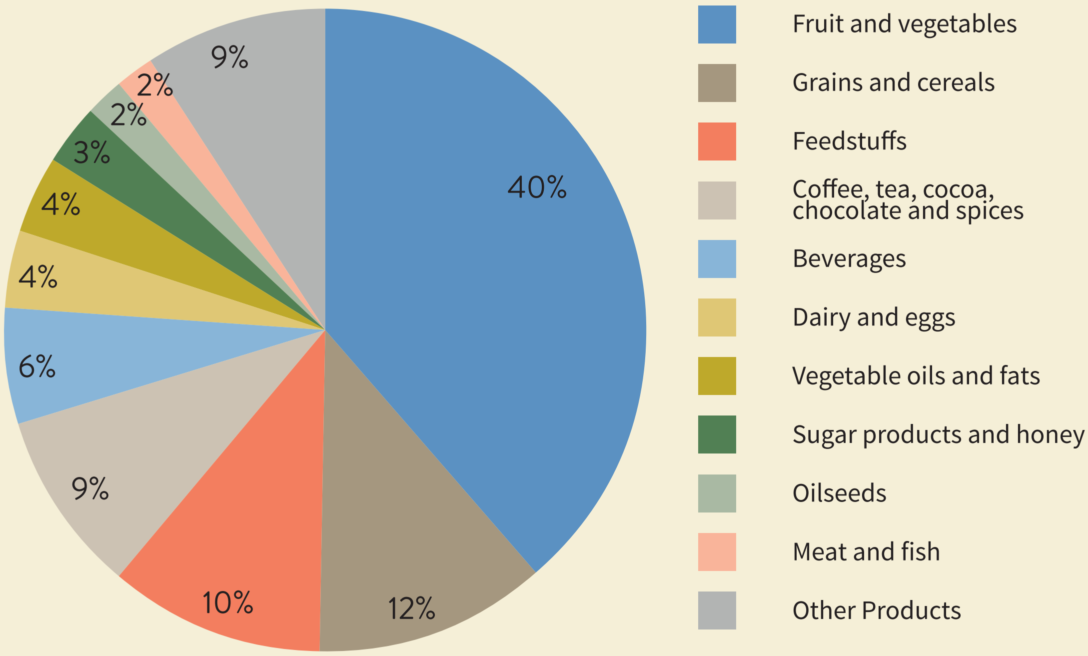
GROWTH IN ORGANIC FOOD IMPORTS – 2010-2023



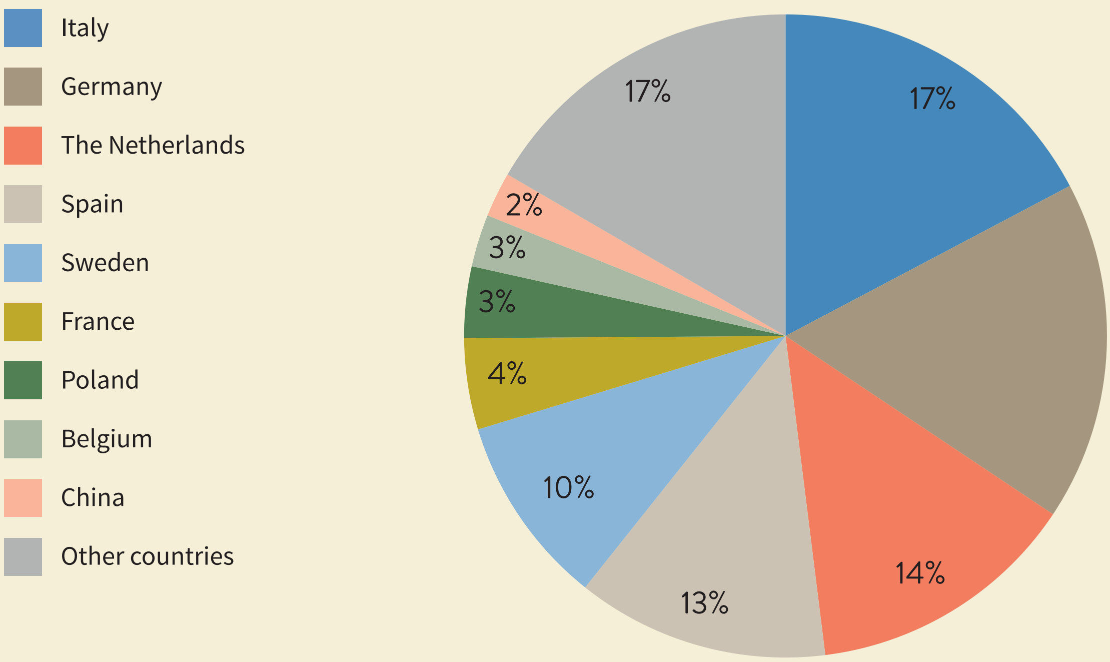
Source: Statistics Denmark

TREND IN ORGANIC IMPORTS

ORGANIC IMPORTS BY PRODUCT GROUP – 2023



ORGANIC IMPORTS BY COUNTRY – 2023



Source: Statistics Denmark

Photo: Uffe Bregendahl

ORGANIC **FARMLAND**

Organic farmland shrank in size again by approx. 3% from 2023 to 2024, to 301,030 hectares at the end of the year, according to the annual report from the Danish Agency for Green Transition and Aquatic Environment (formerly the Danish Agricultural Agency) and Statistics Denmark.

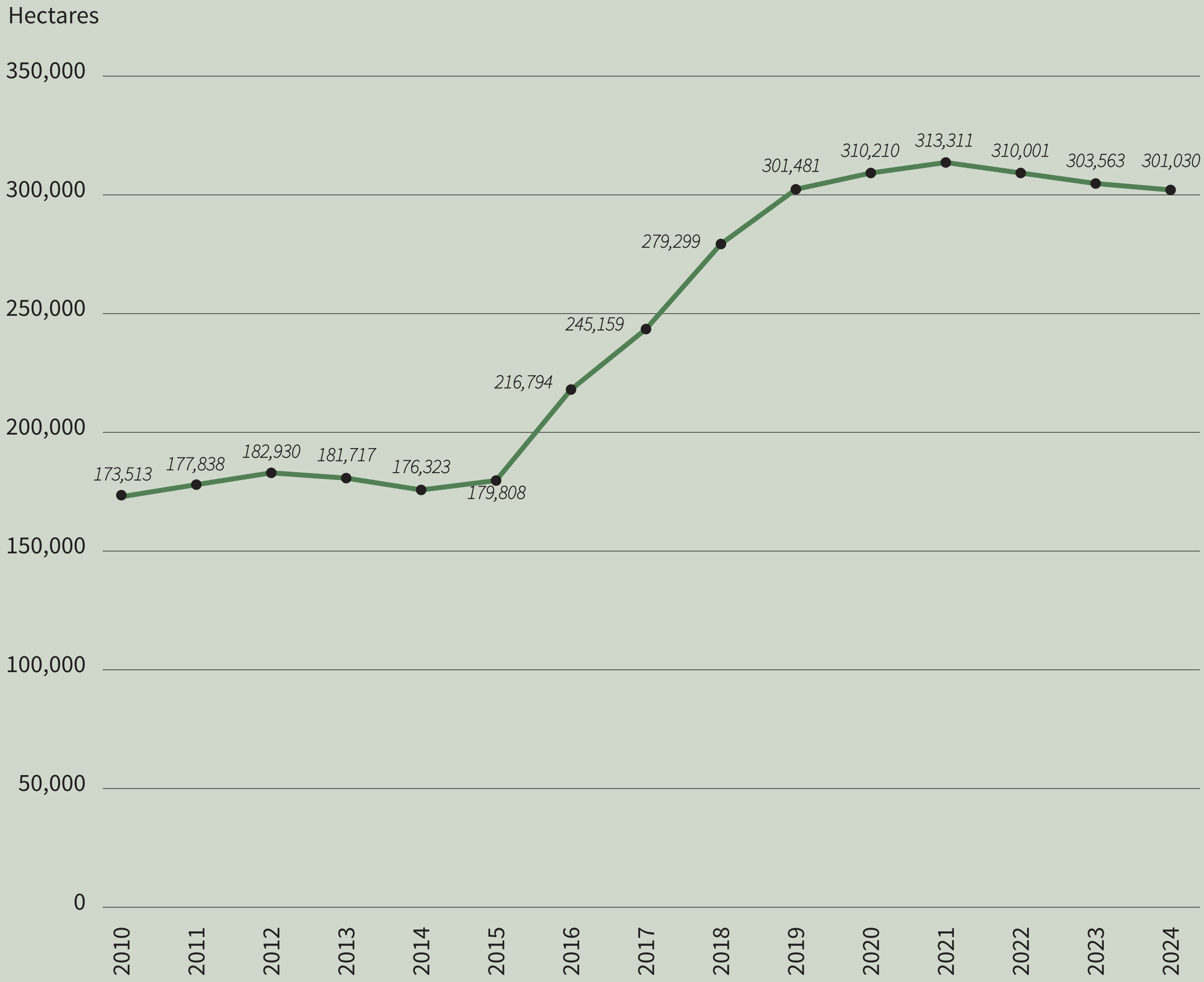
Organic acreage peaked in 2021, when there were 4,151 organic farms in Denmark. In 2024, only 3,930 remained. This corresponds to a drop of around 5%.

The reductions happened in various ways. Some farms totally ceased operation, others returned to conventional farming and yet others were sold and then converted to conventional farming. On the positive side, the acreage used for organic horticulture – primarily fruit and vegetables – rose by 6% in 2024 after falling in both 2022 and 2023.

The organic share of the total land used for horticultural crops rose from 30% in 2023 to 32% in 2024 according to Statistics Denmark.

This is still far from the government's goal of doubling organic farmland by 2023, to account for 21% of total Danish farmland.

TOTAL ORGANIC FARMLAND IN DENMARK – 2010-2024



Source: Statistics for organic strawberry farms

STRONG ORGANIC EXPERTISE AT YOUR DISPOSAL

Organic Denmark's retail team are specialist consultants with extensive knowledge and skills to support the entire value chain in the grocery sector. The team works with initiatives such as foundation-supported projects that focus on improving knowledge among companies and retail chain decision-makers on the market potential and benefits of organic farming. We are always ready for dialogue. So contact us if you need knowledge and inspiration or want to share your experiences.

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Organic Market Report 2024	okologi.dk/viden-om-oekologi/salg-og-forbrug
Organic Denmark's other reports	okologi.dk/viden-om-oekologi/salg-og-forbrug/salg

You can also explore the statistics bank at Statistics Denmark, where you can find figures on:

Retail trade	statistikbanken.dk/oeko3
Imports/Exports	
Product groups	statistikbanken.dk/oeko4
Geography	statistikbanken.dk/oeko55
Geography and product groups	statistikbanken.dk/oeko66
Foodservice	
Conv./organic, product groups	statistikbanken.dk/oeko77
Conv./organic, customer groups	statistikbanken.dk/oeko88
Organic farmland	
Organic farmland (status, crops 2012-23)	statistikbanken.dk/oeko11
Organic livestock	
Organic livestock	statistikbanken.dk/oeko2
Production	
Statistics for organic farms in 2023	lbst.dk

You are always welcome to contact Organic Denmark's Market Department if you have any questions about organic market trends or this market report.

Contact information Market Department	okologi.dk/om-os/kontakt

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MORE AND BETTER ORGANIC PRODUCE