# ORGANIC MARKET REPORT 2024

RETAIL TRADE

ØKOLOGISK LANDSFORENING

Photo: Unsplash

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**Published by**
Økologisk Landsforening (Organic Denmark)
Agro Food Park 26, 8200 Aarhus, Denmark
økologi.dk

ISSN 2794-7890

**Financial support**
Fonden for **økologisk landbrug**
**Promille**afgiftsfonden for landbrug
Funded by the European Union NextGenerationEU



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# NEW & BETTER TIMES

**CARSTEN AHRENFELDT**
MARKET DIRECTOR
ORGANIC DENMARK

The economy, including the organic economy, has been struggling with the after effects of COVID-19, war and escalating conflicts, energy market turbulence, rising interest rates, inflation etc. for a few years now. Many global challenges still remain, but it is good to see that the economy has moved out of the turbulence and is now steadily improving.

This is also being felt in the organic market. For the first time in a long time, we are finally seeing positive growth for organic products. Small growth, but still a positive sign. We are therefore pleased that the better new times we have been forecasting for a while are actually now taking shape.

We have always maintained that the growth in the organic segment would eventually return. This is because consumers have continually expressed that they want organic products, and because organic products remain the best way to meet a number of the challenges, wishes and needs of the planet, market and consumers.

But we must not rest on our laurels. There is still some way to go to return to the growth rates for the organic market that we saw for many years leading up to the outbreak of COVID-19.

We need to have more organic products and varieties on the shelves again. We must win back those consumers who were forced to curtail organic purchases due to challenges balancing their household budget. We also need to even more clearly articulate the ability of organic produce to effectively address the major societal challenges in relation to climate, biodiversity and health. We must also ensure that young consumers get on board as well, equipped with knowledge and motivation.

The connection between sustainability and organic produce has been formalised with the rules for companies' Environmental Social Governance (ESG) reporting. The rules apply to large listed companies in the first instance. But they affect the entire value chain, so ESG is already relevant even for smaller companies that supply the large companies.

**ORGANIC PRODUCE HELPS TOWARDS ESG**

ESG reporting provides an opportunity to document and highlight the close connection with and positive impact of organic produce on sustainability. Organic companies have a 'first mover' advantage in this area because they are already used to documenting the scope and impact of their organic enterprise. So even though more reporting is not usually something to be enthusiastic about, it may end up being beneficial for all organic companies. Read more about it in this report.

So all in all, there is plenty for us to work on, and we look forward to doing it together with you. In the meantime, we hope you enjoy reading this report. It contains a range of insights across channels, categories and areas of expertise. With these in mind, we will all be better equipped to make new organic advances.

# CAN ORGANIC PRODUCTS RECLAIM LOST RETAIL SHELF SPACE?

**BIRGITTE JØRGENSEN**
RETAIL MARKET DIRECTOR,
ORGANIC DENMARK

The retail market situation has been quite unique over the past three to four years. First came COVID-19, which led to large growth in grocery sales – including organic sales. This was followed by inflation, greater price focus and unprecedented restructuring in the retail sector. This has led to the first ever decrease in organic market share over the past two years. But the first analyses in 2024 and feedback from retail chains suggest that consumers are settling into a 'new normal' and are ready to buy even more organic products – again.

The retail chains and organic companies must therefore be ready to reclaim what was lost. It is important to note that the core organic consumers, such as families with children and older couples living alone, have never completely abandoned organic products. The latter group has largely maintained its organic consumption over the past two years. But many organic products have disappeared from shelves, and the trend has been towards a large proportion of lower price products and a greater focus on the chains' own organic private label products. This has led to a vicious cycle on the market, with consumers struggling to find a wide selection of organic foods in different quality and price ranges, and inspiration for organic meals.

An important focus area is that consumers do not base their grocery shopping around ingredients or semi or full-convenience. They shop for meals and eating situations throughout the day, and it needs to be easy – time is precious to most people. This means that the organic food ranges offered by retailers must reflect and be able to meet this demand in order to attract organic consumers.

New growth places demands on the entire value chain, as there are many issues on the green agenda that organic farming has to compete with for attention. The red 'Ø' symbol is an easily recognisable marker for consumers on products, on store shelves and in various media such as retail magazines, the web and social media – but the entire value chain needs to reflect on whether this is enough alone to reach new and old organic consumers alike.

**ORGANIC BENEFITS MUST BE SPELT OUT**

Our dialogue with market players shows that we need to together reinvent and highlight the essential organic values – on product packaging and in the purchasing situation. The benefits of organic produce must not seem elitist and obscure, but must again be made explicit and easy for consumers to understand. It needs to be transparent why the organic variant costs more in some categories, and the positive contribution of organic produce to the green agenda must also be clear. The organic messages have been developed for just this purpose, and can be found on the following pages and freely used by everyone for clear communication.

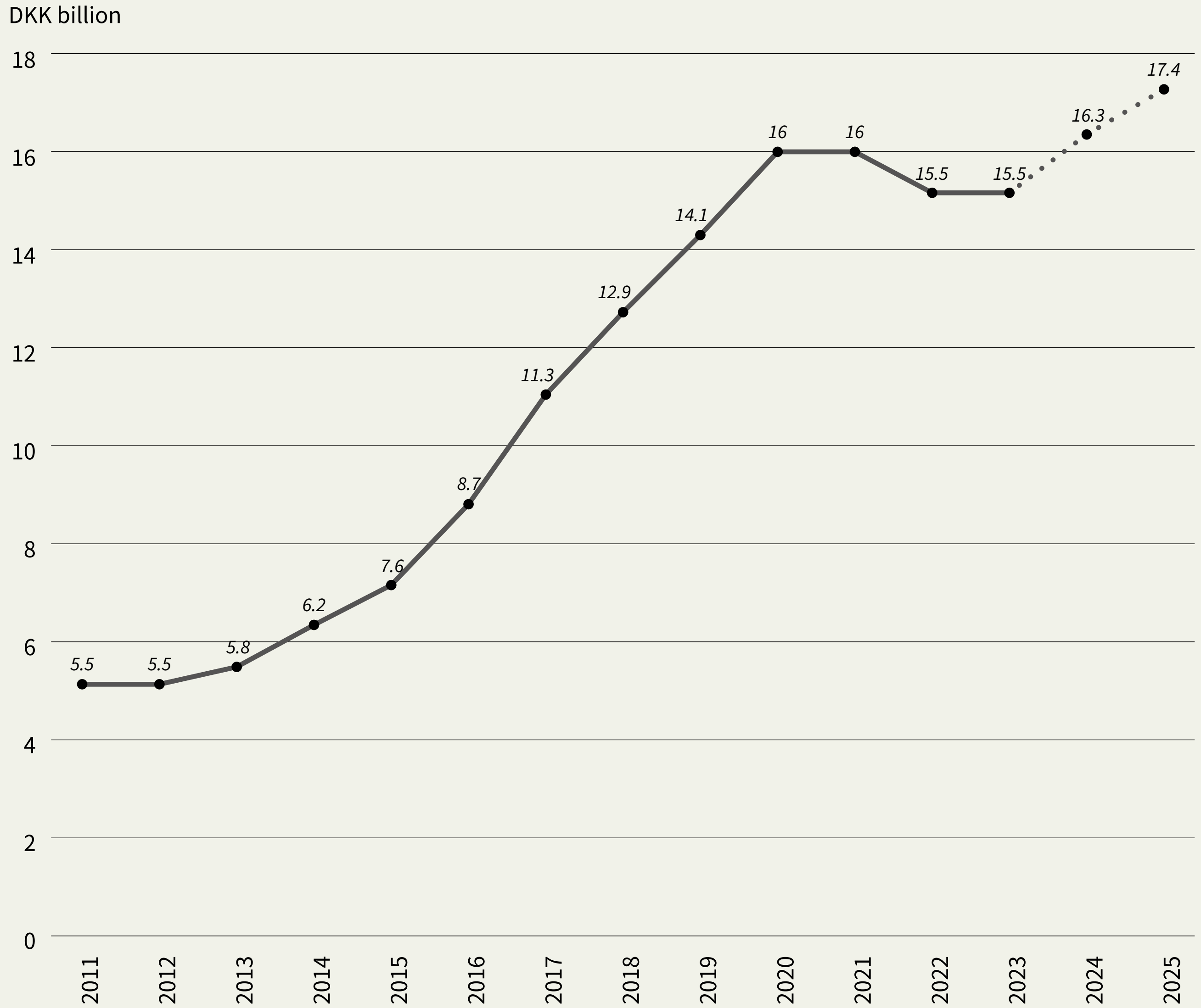
The time has come for organic products to reclaim their lost shelf space in retail trade in all categories, varieties and price ranges – and let us together ensure that the contribution organic produce makes to the green transition is clear to everyone.



- Retail trade incl. online shopping: DKK 15.5 billion
- Farm shops, specialty shops etc.: DKK 0.6 billion*
- Foodservice: DKK 3.3 billion*

# SALES OF ORGANIC PRODUCTS

**ORGANIC RETAIL SALES 2010-2025 (DKK BILLIONS)**




*Source: 2010-2023 Statistics Denmark. *2024-25 estimate by Organic Denmark*

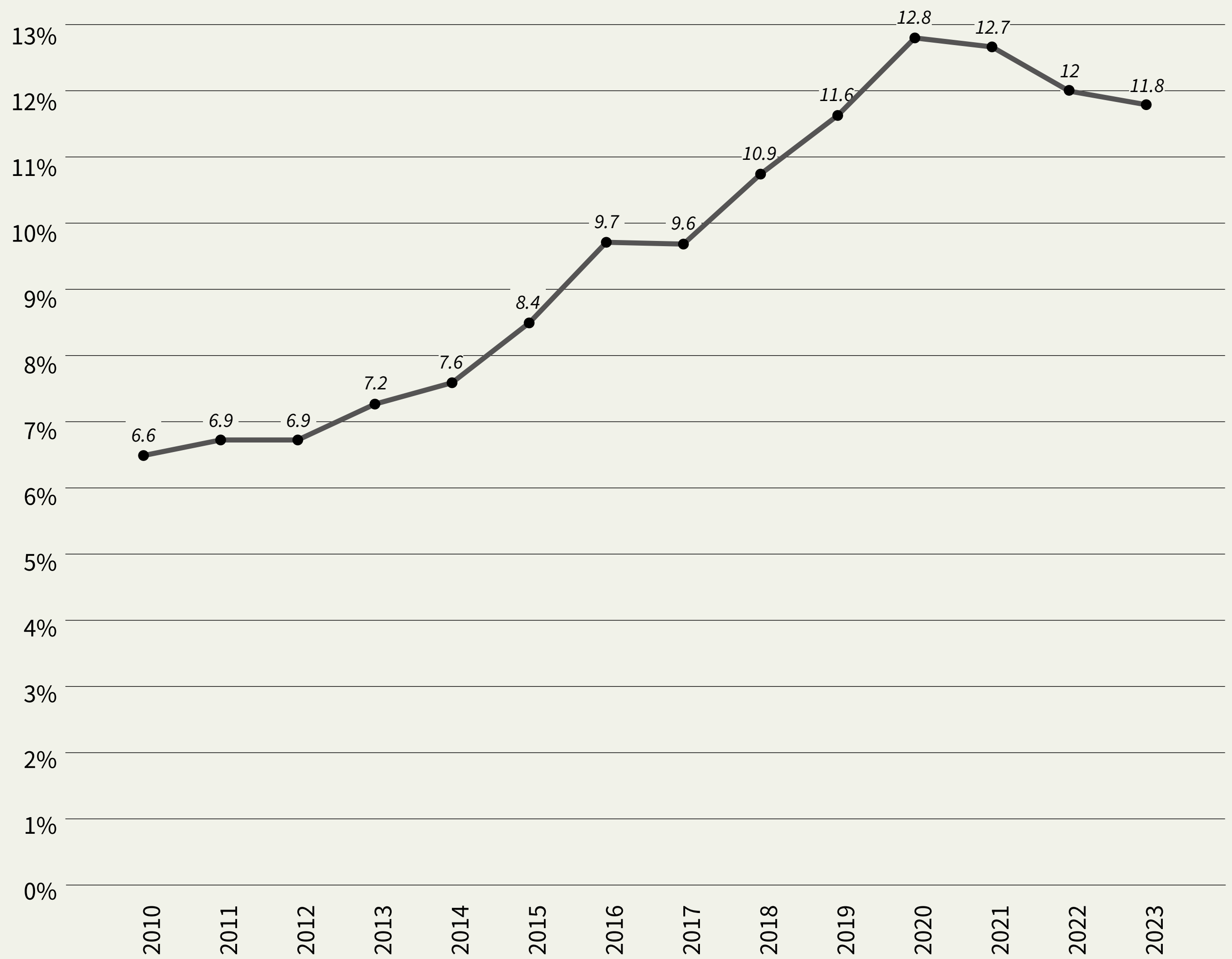



# ORGANIC **MARKET SHARE**

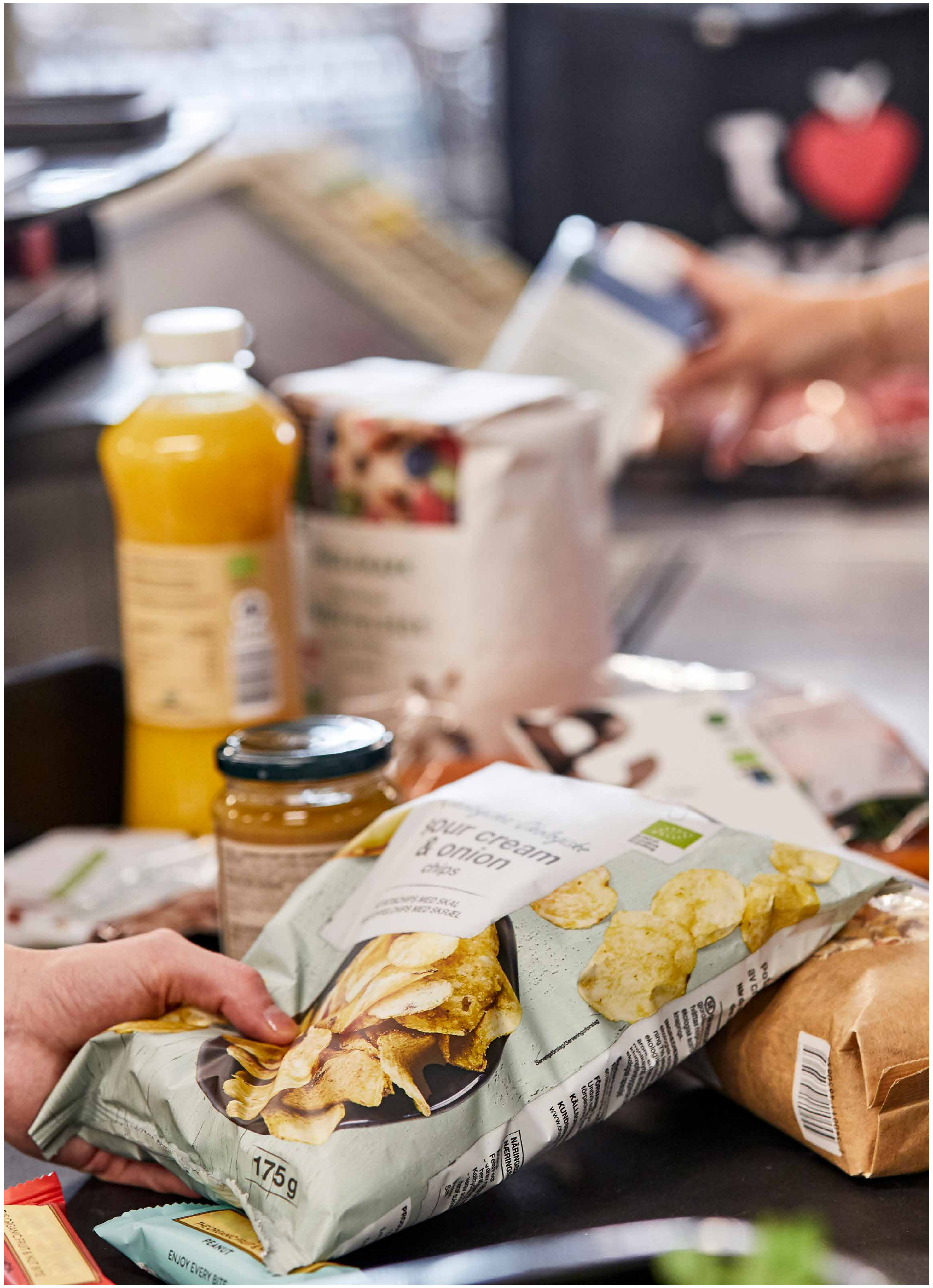
According to Statistics Denmark, the organic market share of retail trade in 2023 was 11.8% measured by value. Inflation and rising prices continued to impact consumers' purchases of organic products. Measured by volume, there was a decrease of 3% compared to 2022.

In general, consumer groceries purchases increased in 2023 according to Kauza, while organic purchases stagnated, resulting in a lower organic market share measured by value. In Q1 2024, the value of organic food retail sales increased at the same rate as total food sales for the first time in many months, according to Kauza. This is partly because consumers are now increasing the number of organic products in their shopping baskets, but they are also buying organic products more often.

**ORGANIC RETAIL MARKET SHARE AS A PERCENTAGE OF VALUE**




*Source: Statistics Denmark*





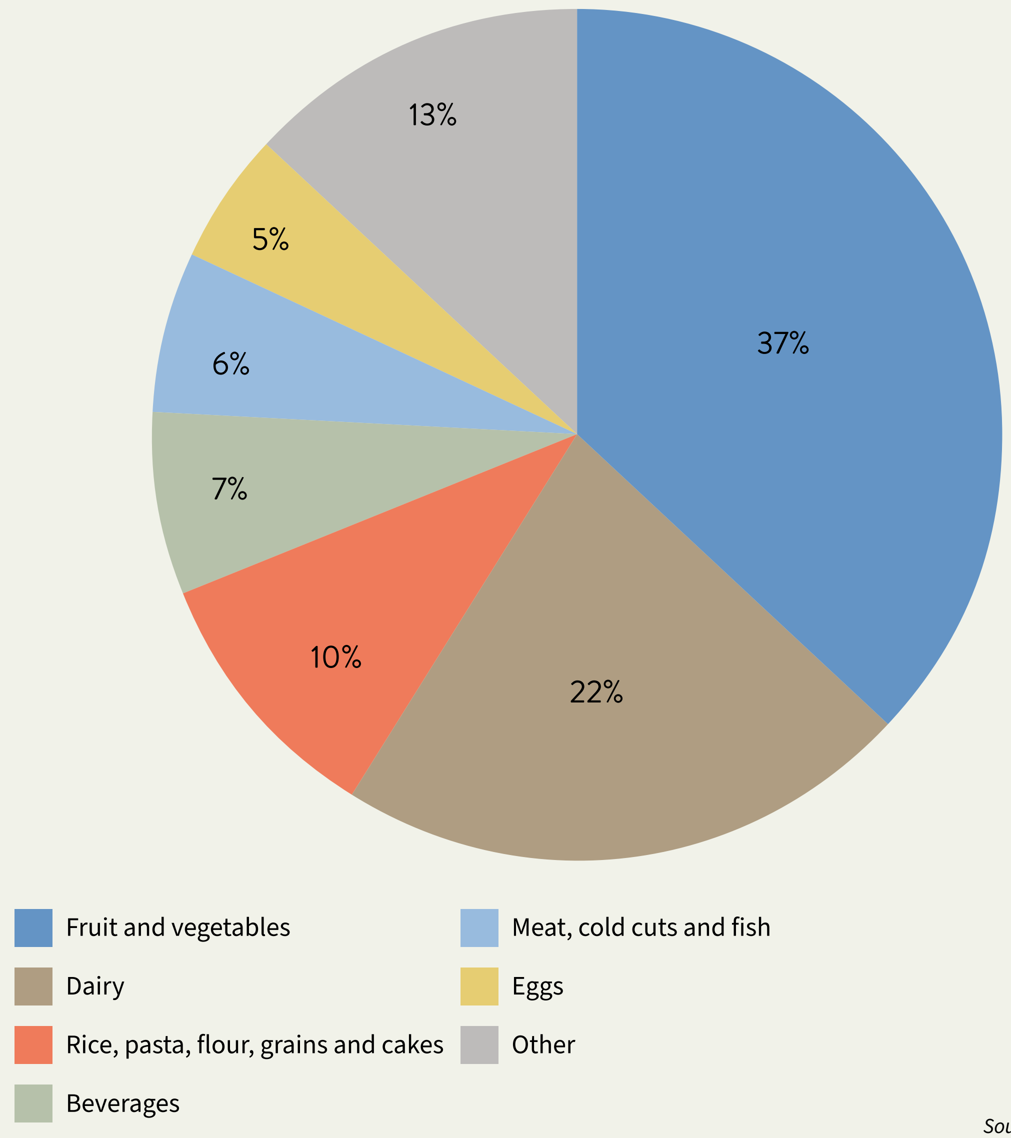

# SALES OF ORGANIC PRODUCTS BY PRODUCT GROUPS

Two categories dominate organic sales – fruit and vegetables and dairy. Together, these two categories made up 59% of organic retail sales in 2023.

Fruit and vegetables have been the organic produce powerhouse since 2015. This is due to the large selection and widespread availability of the products in this category. The price difference between organic and conventional variants of many core products has also been reduced or completely equalised. The powerhouse role is further reinforced by the fact that one of the strongest motives consumers have for choosing organic is the desire to avoid pesticides, and this is closely tied to fruit and vegetables. Sales of organic fruit and vegetables have therefore also remained stable throughout the period, despite inflation, amounting to DKK 5.7 billion in 2023.

Dairy, including plant-based drinks, was the second largest category with sales of DKK 3.5 billion in 2023. Dairy has gone from being the organic powerhouse to more being the first-mover category for organic products. Changes in consumer buying patterns become quickly evident in this category. According to Kauza, the first small positive trends in the organic market were visible in Q4 2023.

**SHARE OF TOTAL ORGANIC SALES BY PRODUCT GROUP IN 2023**




*Source: Statistics Denmark*

# ORGANIC MARKET SHARE
## FOR SELECTED PRODUCT GROUPS

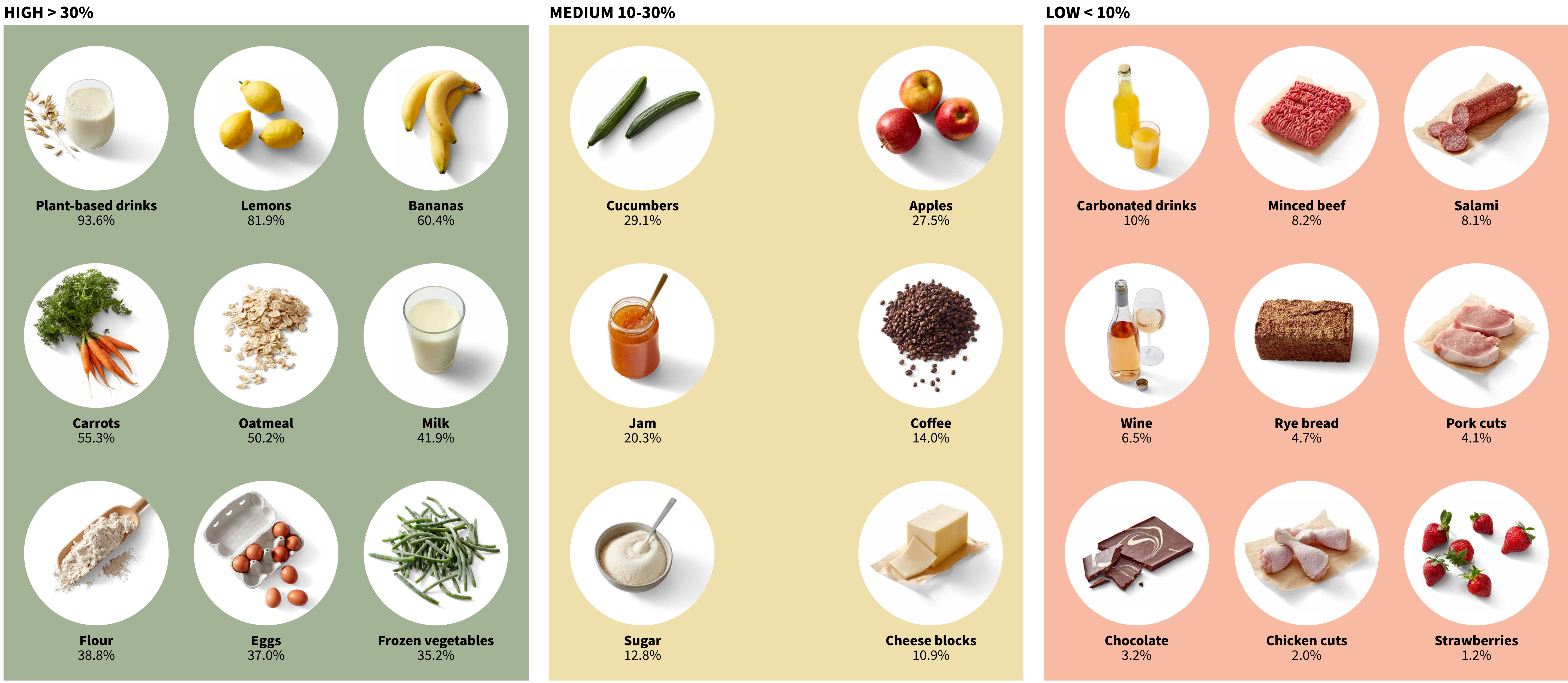
There are great variations in market share within the various product groups. Individual products with by far the largest market share are found among core products such as carrots, oatmeal, eggs and milk. These products are readily available in grocery stores in a wide range of alternatives.

Plant-based drinks topped the list again in 2023. This simply underlines the strong overlap between consumers who buy organic and consumers who buy plant-based alternatives. The market share for bananas dropped from 79.6% in 2022 to 60.4% in 2023. This is partly because only the Coop chains maintained their decision to carry only organic bananas in their stores.

Data from Coop Analyse forms the basis for the 'organic ladder', which shows how consumers move up the ladder from basic goods to more luxurious goods, such as soft drinks, wine and chocolate. The market shares for the various product groups clearly show this ladder, with a few exceptions. The more expensive products are (such as meat), or the more processed, the greater the typical drop in market share, due to a bigger price difference between the organic and conventional variants. Another factor is that a higher degree of processing for products such as jam, convenience products or meal boxes means that consumers do not as easily link their buying preferences directly to the product, according to analyses from Madkulturen.

Organic rye bread and strawberries have very small market shares, even though both product groups are seen as basic products. However, the former product group is characterised by a limited selection and the latter by a very short season and a strong focus from consumers on production location for fresh fruit and vegetables.

**ORGANIC MARKET SHARE FOR VARIOUS PRODUCT GROUPS BY VALUE IN 2023**




*Source: Kauza shopper data*

# ORGANIC **MARKET SHARE IN RETAIL CHAINS**

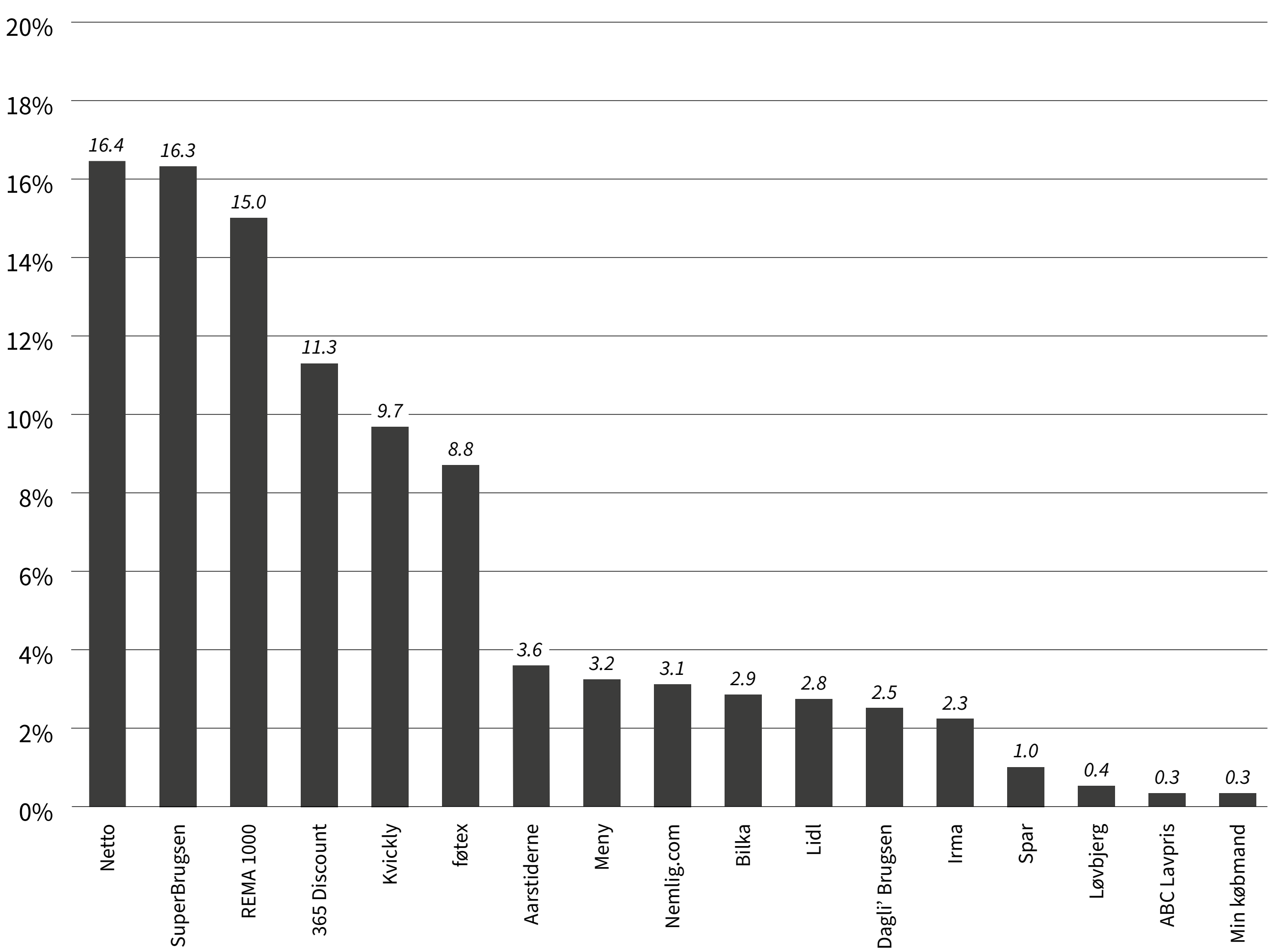
In 2023, Netto was still the market leader with a market share of 17% of organic retail sales, but SuperBrugsen and REMA1000 were close behind. The top three accounted for 49.5% of organic retail sales in Denmark. The four large discount chains – Netto, REMA1000, 365discount and Lidl – dominated the market in 2023 with an organic market share of 47.2%. A year with a strong focus on positioning and price among the chains and consumers.

Online grocery shopping dropped back to a normal level after COVID-19, with the result that Nemlig.com decided to close its Jutland warehouse again.

There were major changes in the grocery chains during 2023, including the closure of Aldi and most Irma stores. The closed stores have been taken over by competing chains, and there have been greater shifts in the market than normally seen. This trend will continue into 2024, where more stores will open, and Coop has decided that SuperBrugsen and Kvickly will carry on as store formats. In mid-2024, Netto has approx. 550 stores and REMA1000 approx. 400, so the battle to be market leader in the discount sector will be close.

According to Kauza, analyses from Q1 2024 show that føtex, Meny and Nemlig.com are gaining the biggest share of former Irma customers.

**EACH CHAIN'S SHARE OF TOTAL ORGANIC SALES IN 2023**




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

# **ORGANIC PERCENTAGE IN** RETAIL CHAINS – HOW ORGANIC ARE THEY?

In 2023, Irma was still the most organic chain, but with the closure of the chain's last seven stores in early May 2024, this organic stronghold has disappeared. Nemlig.com has taken second place for several years, and is expected to have the highest organic percentage in 2024 when this is calculated.

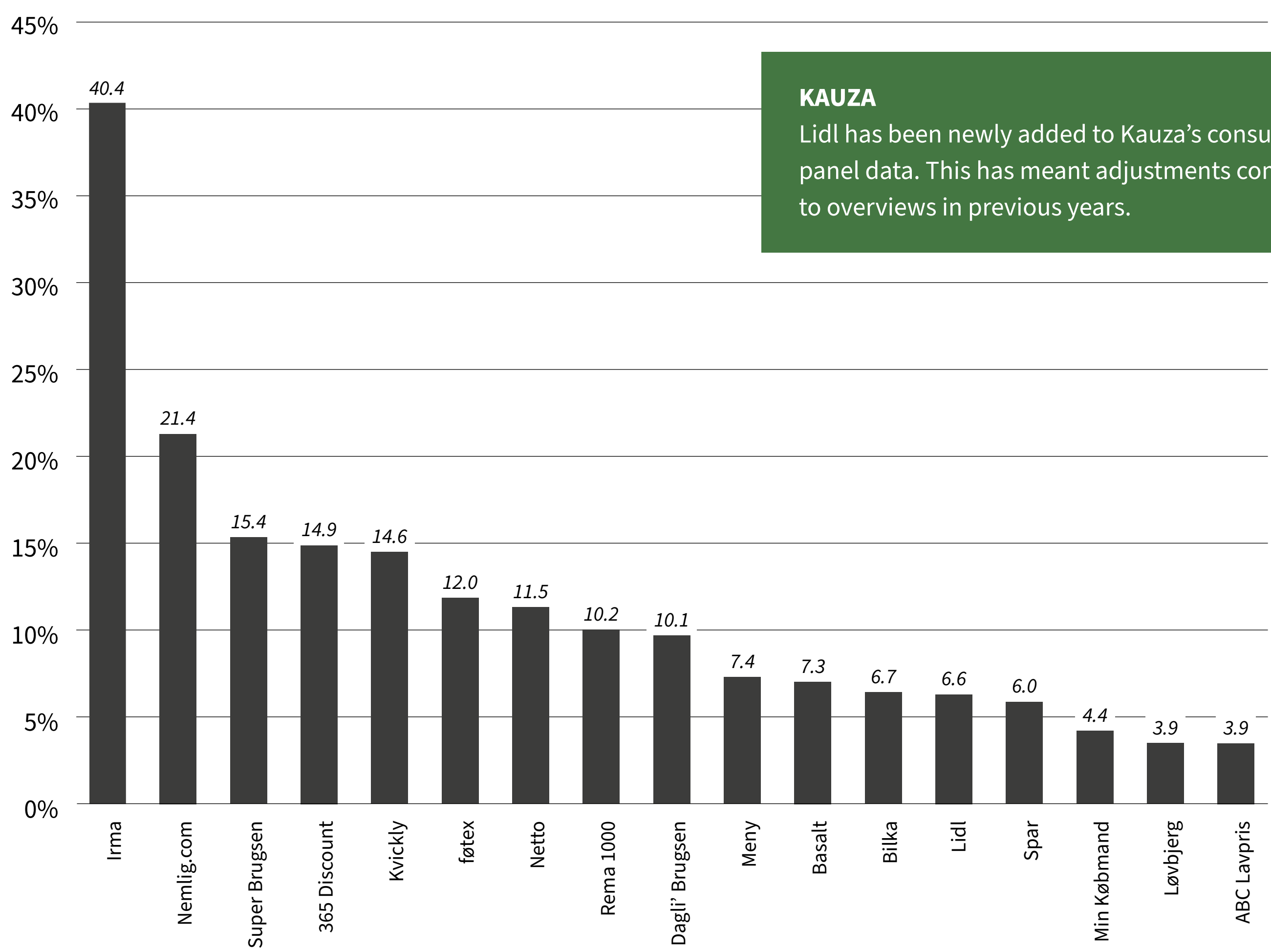
Supermarkets dominated the top five positions, as expected, as their organic range is wider and deeper in terms of the number of products and varieties. However, 365discount secured fourth place.

All the major grocery chains continued to invest heavily in their organic private produce labels in 2023, and sales of the organic private label variants were still rising as the year drew to a close – especially in the discount stores.

There are private labels in all organic categories, from fruit and vegetables to wine, and they can help create greater loyalty from customers to the given retail chain. However, together with the major price focus in the organic market in 2023, the greater focus on private labels among the chains has contributed to there being fewer organic product variants in retail trade during 2023.

**ORGANIC SHARE OF RETAIL CHAINS' FOOD PRODUCT SALES IN 2023**

**KAUZA**
Lidl has been newly added to Kauza's consumer panel data. This has meant adjustments compared to overviews in previous years.




*Source: Kauza shopper data*

# ORGANIC POTENTIAL OF THE GROCERY CHAINS

In 2023, Netto and REMA1000 continued to have the greatest potential because so many customers shopped at their stores during the year. In the figure, this is illustrated by the two chains having the largest bubbles. However, Netto and REMA1000 are closely followed by 365discount, SuperBrugsen, Kvickly, føtex and Meny.
In 2023, Nemlig.com, 365discount, SuperBrugsen, Kvickly, REMA1000 and Netto were better at meeting their customers' needs for organic products than groceries in general. While føtex, Meny, Lidl, Bilka, Dagli'Brugsen and the rest of the market were better at meeting their customers' needs for groceries in general.
Irma, Nemlig.com, 365discount, SuperBrugsen and Kvickly 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.

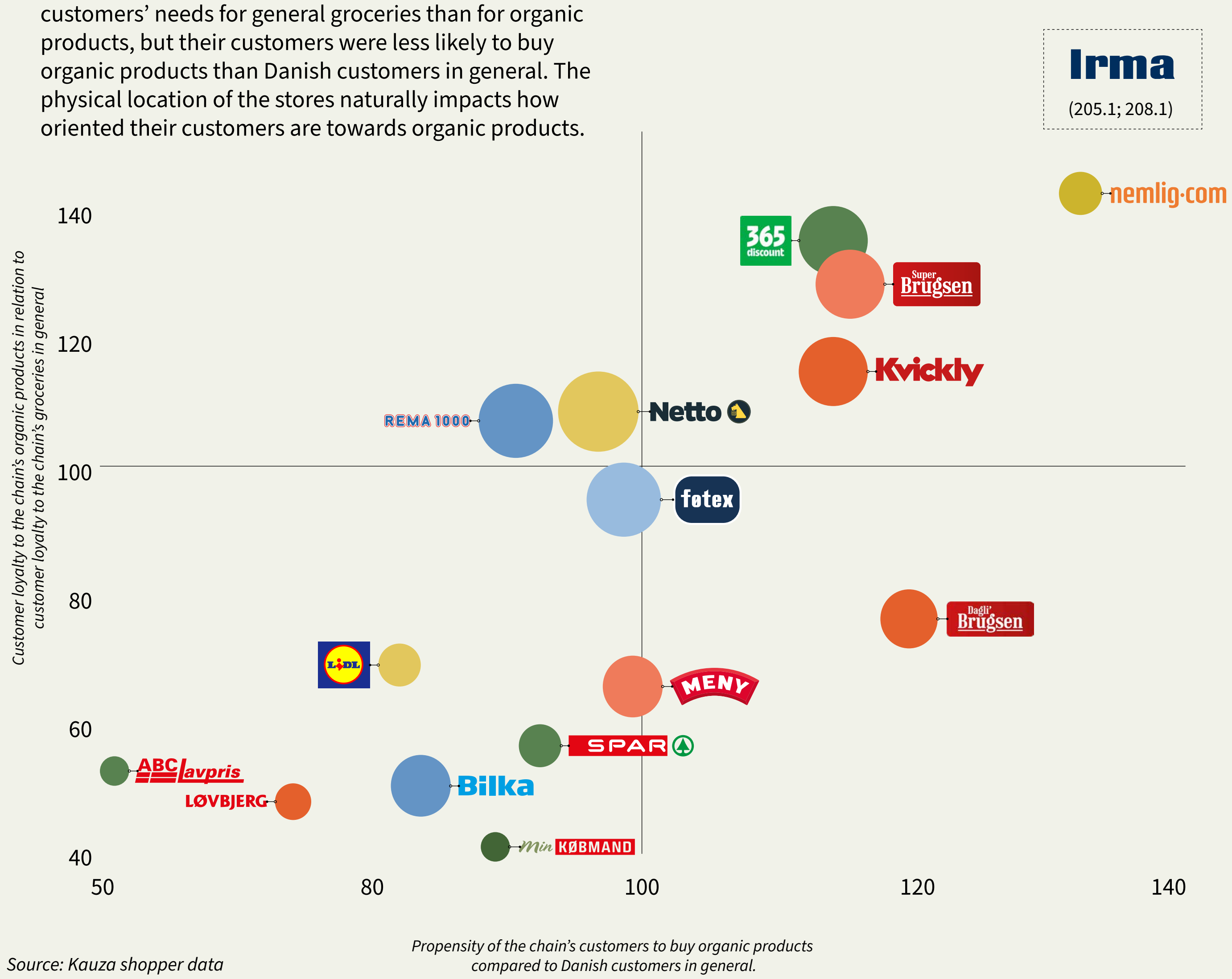
**WHO HAS THE GREATEST UNTAPPED POTENTIAL?**
In 2023, føtex, Meny, Bilka, Lidl, Spar, MinKøbmand, Løvbjerg and ABC Lavpris were all better at meeting their customers' needs for general groceries than for organic products, but their customers were less likely to buy organic products than Danish customers in general. The physical location of the stores naturally impacts how oriented their customers are towards organic products.

However, these chains have an untapped potential which they could exploit by 1) improving and expanding their organic range, 2) improving their marketing in specials magazines, on the web and in social media, 3) increasing the visibility of organic products in store and 4) telling their customers about the difference organic products make.

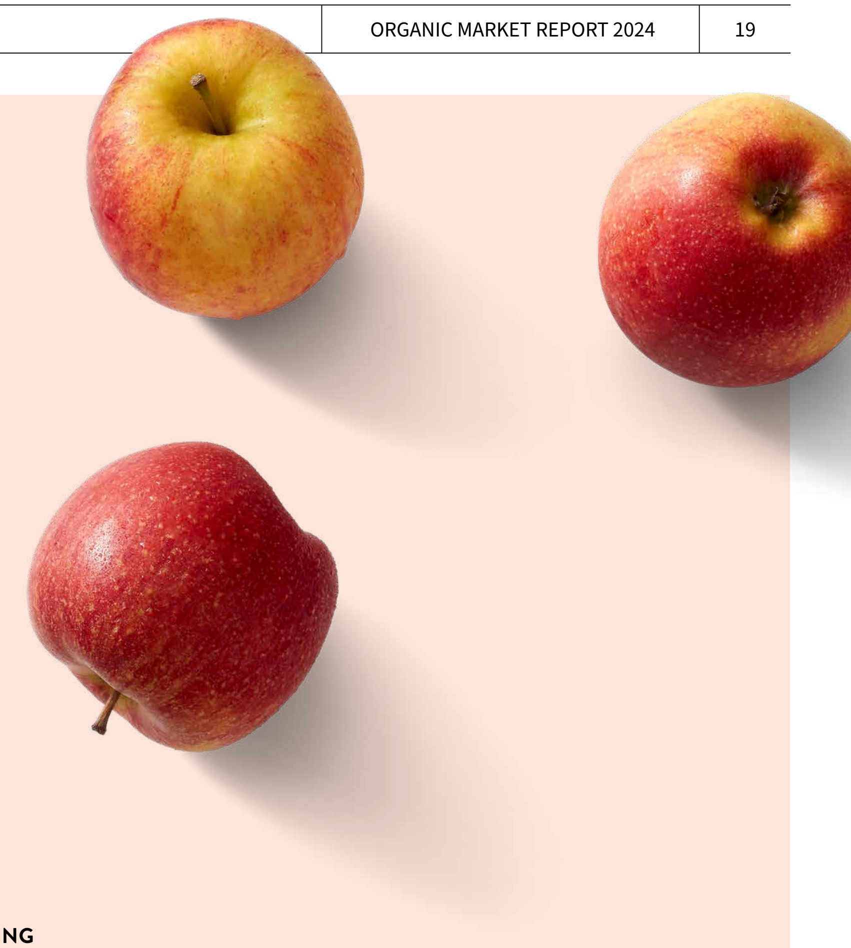
**HOW TO READ THE FIGURE**
The size of the bubble indicates the chain's potential, defined as the total purchases of organic products by the chain's customers, inside and outside the chain.

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

**JEFF SALTER**
DIRECTOR OF COMMERCIAL,
CATEGORY AND PRODUCT RESPONSIBILITY
AT COOP DENMARK

***HOW DO YOU VIEW THE ORGANIC SEGMENT IN 2024 OVERALL?***

It is not likely to be the year in which the organic segment takes off. Consumers are still a little hesitant after a few years of inflation and uncertainty. Organic products are still an important focus for us and for our customers, but the pace will be slow. We believe there will most likely be a positive change in sales over the coming years.

***WHAT ARE YOUR PLANS FOR ARTICULATING ORGANIC PRODUCE IN THE BUYING SITUATION IN STORE, IN RETAIL MAGAZINES AND IN SOCIAL MEDIA?***
***GIVEN THAT WE HAVE A YOUNG GENERATION THAT KNOWS WHAT THE ORGANIC LABEL IS, BUT NOT WHAT IT MEANS.***

It is important that we find new ways to communicate organic produce to the new generations. They grew up with the Organic Label, but need more knowledge about what lies behind it. We do not have a set plan for how to achieve this at present. But there is clearly a great need to do so, especially given the issues that are important to young people. The whole sector faces a major communication task – and it has been many years since we last saw a nationwide campaign across market players. We need that again.

***WHAT ROLE DO YOU PLAY AS A CHAIN IN INCREASING ORGANIC SALES AND THE AVAILABLE RANGE?***

We have a major role, and we need to work to get the right organic products on the shelves, following a period where everyone – including us – has streamlined their selection. We also play an important role in getting organic products out across Denmark.

***WHAT OPPORTUNITIES EXIST TO ADD IN MORE PRODUCTS – AND CREATE MORE VALUE POSITIONS IN THE ORGANIC SEGMENT?***

Everyone has made cuts to their range, and this often impacts marginal products, including organic products. Work needs to be done to rebuild the organic range and get the right products on the shelves. This applies to frozen, non-perishable and convenience foods, but also to fruit and vegetables and the key animal categories in dairy and meat.

**JESPER GOTTSCHALCK BJERRING**
COMMERCIAL DIRECTOR
AT MENY

***HOW DO YOU VIEW THE ORGANIC SEGMENT IN 2024 OVERALL?***

We are seeing consumers starting to buy more organic products again in 2024. This indicates tentative growth, after a few years in which consumers have had a greater focus on price due to the crisis. But it is still too early to say how 2024 will turn out for the organic segment.

***WHAT ARE YOUR PLANS FOR ARTICULATING ORGANIC PRODUCE IN THE BUYING SITUATION IN STORE, IN RETAIL MAGAZINES AND IN SOCIAL MEDIA?***
***GIVEN THAT WE HAVE A YOUNG GENERATION THAT KNOWS WHAT THE ORGANIC LABEL IS, BUT NOT WHAT IT MEANS.***

Our focus is on a broad target group in relation to organic products. Our own Grøn Balance brand has a major presence in retail magazines and on social media. For example, we ran a competition on social media where participants could win a gift basket containing products. We also have three inserts in our retail magazines with a focus on Grøn Balance in weeks 16, 26 and 45. There is more focus on organic products than we normally have. In Spisetid, issued six times a year, we put the spotlight on local Danish produce and organic produce by highlighting products from Øllingegaard etc. We have also done co-branding between Grøn Balance and Øllingegaard, which has really boosted both brands.

***WHAT ROLE DO YOU PLAY AS A CHAIN IN INCREASING ORGANIC SALES AND THE AVAILABLE RANGE?***

It is important that we as a grocery player take responsibility for helping develop local Danish products and organic produce. We will engage in more dialogue with producers to work out how we can help support these two segments. In the past, we have tended to focus on our own position in the value chain in isolation, but there will be more focus in the future on our role as the link between producers and consumers.

***WHAT OPPORTUNITIES EXIST TO ADD IN MORE PRODUCTS – AND CREATE MORE VALUE POSITIONS IN THE ORGANIC SEGMENT?***

We see good opportunities to expand the range in collaboration with producers and the entire value chain. There is both a commercial and a societal interest in advancing the organic segment.

# ORGANIC PRODUCTS IN DISCOUNT SEGMENT

**ANDERS RENE JENSEN**
PURCHASING AND MARKETING DIRECTOR
AT REMA 1000

***HOW DO YOU VIEW THE ORGANIC SEGMENT IN 2024 OVERALL?***
We have seen a positive trend for organic products in early 2024, in terms of both value and quantity. This shows us that consumers want the pure products, and are returning after a period of turbulence. Customers are still price-focused because these are still uncertain times.

***WHAT ARE YOUR PLANS FOR ARTICULATING ORGANIC PRODUCE IN THE BUYING SITUATION IN STORE, IN RETAIL MAGAZINES AND IN SOCIAL MEDIA?***
***GIVEN THAT WE HAVE A YOUNG GENERATION THAT KNOWS WHAT THE ORGANIC LABEL IS, BUT NOT WHAT IT MEANS.***
We normally have a page of organic products in our retail magazines each week, and we have various campaigns throughout the year on social media and other platforms, which focus more on product and price than on the narrative. We take up the latter at the farm-to-table events we participate in.

These might be at Gram Slot, where consumers are invited inside, or at Naturmødet, where we take part in debates on biodiversity, organic produce and plant-based foods. In our experience, consumers are far removed from primary production,- but want to know something about the products they buy. Meeting face-to-face is therefore of much more value when it comes to complex messages.

***WHAT ROLE DO YOU PLAY AS A CHAIN IN INCREASING ORGANIC SALES AND THE AVAILABLE RANGE?***
We play a key role in advancing sales and getting more products on the shelves. It is also our role to set demands for producers and activate new products.

***WHAT OPPORTUNITIES EXIST TO ADD IN MORE PRODUCTS – AND CREATE MORE VALUE POSITIONS IN THE ORGANIC SEGMENT?***
We are taking in new products from Vallø Slot and Gram Slot. These are products with a story – and this is popular with consumers. Consumers are still hesitant, and hence less willing to buy goods they are not familiar with. We add items to our range if customers want to buy them. But I think the entire sector should do more to inform consumers about organic produce, for example through nationwide campaigns, where everyone communicates the same messages on the key issues. I think it is important that we put aside our differences and work together on the big issues, and then we can compete on product and price in our daily businesses.

Photo: Rema1000

**KHALIL TALEB**
DEPUTY PURCHASING DIRECTOR
AT LIDL DENMARK

***HOW DO YOU VIEW THE ORGANIC SEGMENT IN 2024 OVERALL?***
Overall, we believe the organic market will see growth again in 2024, after somewhat challenging conditions in 2023 due to high inflation. We are already seeing a more positive trend in the early months of 2024, and expect to see a better year for organic produce. We also believe that organic products will continue to play a significant role at Lidl in 2024, and we will continue to focus on the segment throughout the year. For example, we started the year by reducing prices on all organic fruit and vegetables by 25% each Saturday in January to promote organic produce. This initiative was followed up by VAT-free prices on all fruit and vegetables in February and March, where organic products were also part of the campaign.

***WHAT ARE YOUR PLANS FOR ARTICULATING ORGANIC PRODUCE IN THE BUYING SITUATION IN STORE, IN RETAIL MAGAZINES AND IN SOCIAL MEDIA?***
***GIVEN THAT WE HAVE A YOUNG GENERATION THAT KNOWS WHAT THE ORGANIC LABEL IS, BUT NOT WHAT IT MEANS.***
We hold campaigns throughout the year that focus on organic produce. We hold campaigns for organic products from the range and other campaign products. We supplement our communication through various marketing channels such as retail magazines, TV, radio, the Lidl Plus app, SoMe, influencers etc.

***WHAT ROLE DO YOU PLAY AS A CHAIN IN INCREASING ORGANIC SALES AND THE AVAILABLE RANGE?***
Lidl plays a very active role, as promoting sales of organic products is an essential part of our strategy. We have worked hard to increase our organic product range over the past many years. We have done this in part through close collaboration with many good suppliers and Organic Denmark. We have also set up an annual campaign plan that regularly markets our organic products across all our marketing platforms. We have used POS material and the like over the years to promote awareness of our range in stores, and have given organic products double exposure in stores by displaying products in their category and as a group.

***WHAT OPPORTUNITIES EXIST TO ADD IN MORE PRODUCTS – AND CREATE MORE VALUE POSITIONS IN THE ORGANIC SEGMENT?***
We are continuously working to optimise our organic product range and looking at how we can expand the current range, replace existing products (to avoid food waste/losses) and keep innovating to expose our customers to lots of great new products.

Photo: Lidl

# ORGANIC SEGMENT IS STRONG FOR **PLANT**-BASED PRODUCTS

For several plant-based product types, organic products account for more than 50%. Organic produce is thus a natural choice for both food companies and consumers when it comes applying the green transition to meals. But there is room for more.

**VIVIENNE KALLMEYER**
COMMUNICATIONS CONSULTANT
ORGANIC DENMARK

Organic plant-based drinks account for 88% of total sales in this category, while the organic share of meat alternatives is 66% and organic legumes account for 58%. These figures derive from an analysis conducted by Organic Denmark based on figures from Kauza.

"Organic produce and plant-based products are tightly linked. Consumers who favour organic produce are also more open to buying plant-based products," says Birgitte Jørgensen, Market Manager for retail at Organic Denmark.

"There is also a built-in green mindset in ecology, which means that it is natural to choose organic ingredients when developing new plant-based products."

**MORE INSPIRATION – MORE KNOWLEDGE**
The great results serve as a foundation for further accelerating the trend. Legumes are still only used in one in 14 evening meals, and most people fall back on the usual dishes, even though seven out of ten people in Denmark would like to eat more climate-friendly cuisine and cut down on meat.

"The dietary guidelines recommend it, and we know that a lot of people in Denmark want a diet with more fruit and vegetables, but not much is changing," says Birgitte Jørgensen.

"There is simply a lack of inspiration and knowledge, as well as organic and plant-based convenience, which directly encourages greener meals. More types of pre-cooked beans or soaked peas in different varieties, ready-made packages with spices and legume products. It has to be easy. Small steps, with recipes that replace a portion of the meat with plant protein, are what will help consumers on their way."

**ROLE OF ORGANIC PRODUCE IN CONVENIENCE**
Convenience is about saving the consumer work processes. This is necessary in a society where 58% of consumers first plan their meal just before making it, and three out of four state that they use one or more convenience products on a typical evening.

"Organic produce plays a key role where convenience contributes to home-cooked meals, and a lesser role in ready meals. Consumers associate organic products with getting closer to the produce," says Flemming Birch, analyst and consumer expert at Birch & Birch.

**POTENTIAL IN MEAT SUBSTITUTES**
Plant-based alternatives to meat is one of the categories with a high organic share, yet which only accounts for 0.2%* of the total value generated from meat in retail trade. Consumers appear to be hesitant to buy products presented as a substitute for something that continues to play a key role in our meals. 74% of Danish consumers' evening meals contain meat.

"Plant-based alternatives must be presented differently to consumers. In terms of labelling, it's crazy to sell a product based on something that it's not," says Flemming Birch.

The market for processed plant-based products has increased significantly since 2013. New launches peaked in 2019 with 275 new products, but there has been a slight decline from 2020 on. Plant-based meat substitutes account for the largest share of new launches at 26%.

> ❞
> Organic produce and plant-based products are tightly linked. Consumers who are organically oriented are also more open to buying plant-based products.
>
> **BIRGITTE JØRGENSEN**
> RETAIL MARKET DIRECTOR, ORGANIC DENMARK

"This is related to the fact that there is a great potential in the market. Meat substitutes account for only 0.2% of total meat sales, so there is room to make further inroads. At the same time, products that replace meat have direct appeal in an area that many consumers find difficult – namely cutting down on meat," says Birgitte Jørgensen.

"But that does not mean that plant-based meat substitutes are where we want them to be. We haven't yet fully worked out how to make the products organic and real alternatives to meat."

**GOLDEN OPPORTUNITY**
There is thus a historically high organic share among plant-based products, but we saw a slight decrease in the organic share among processed plant-based products in 2022**. This may be because some producers want to reach a broader consumer segment that does not have the same organic focus as consumers who are vegetarians, for example. Several studies have shown that the more plant-based one's diet is, the higher the preference for organic produce.

"There's a golden opportunity in the market right now. We need to talk about organic produce, green food and easy meals in the same sentence, and be aware that consumers – also in a broader sense – want to eat a more plant-rich diet, without it having to be a science or a niche," says Birgitte Jørgensen.

"We actually need to see the entire plant-based area as being on par with the movement that made organic produce mainstream. There's a lot to be learned."

**The figure is based on Kauza's report for Q1 2024.*
***From the report: 'Markedsdata for den plantebaserede fødevaresektor i Danmark i 2022 – med særligt fokus på økologiens betydning' (Market data for the plant-based food sector in Denmark in 2022 – with a special focus on the importance of organic produce).*

READ MORE

# ORGANIC PRODUCE IS AN IMPORTANT CLIMATE TOOL

Climate is at the top of the sustainability agenda for customers and consumers, but how does organic produce fit in? Is it better for the climate? And can producers, food companies and retail chains help consumers choose and use organic products as part of the green transition?

**VIVIENNE KALLMEYER**
COMMUNICATIONS CONSULTANT
ORGANIC DENMARK

First of all, organic produce has been identified by politicians as a key tool for a green transition of agriculture. The Danish government has the stated goal of doubling the area being farmed organically by 2030. This would mean that about 21% of agricultural land is used for organic farming in just over five years.

We will only achieve this goal if everyone works together to clearly communicate the benefits of organic produce, so that consumers demand and buy organic products. Organic farmers, companies and retail chains are working to make organic food easy to choose as part of the solution in the food system of a new era. Given that 99% of consumers are familiar with the red Organic Label, it is also easy to spot the products on the shelves. But that is not enough.

Many consumers lack knowledge about organic produce – and especially how it impacts the climate. Knowledge that motivates and helps them understand why organic farming is a little more expensive, but is also an important tool for the green transition of our agriculture and food system.

Let us put to rest the myth that organic farming has a bigger impact on the climate than conventional farming. If you look at $CO_2e$ in isolation, organic and conventional production have the same impact. At least if you measure impact per kilogram of product. If the results are calculated per hectare (land unit), organic production performs better than conventional production.

It is also built in to organic farming that livestock production has to be reduced. This is in part because organically farmed livestock must have access to outdoor areas, and it would be impossible to meet these requirements if we maintain the large livestock population that we have in Denmark today. And it will be impossible given that we want to create space for more untouched nature and biodiversity.

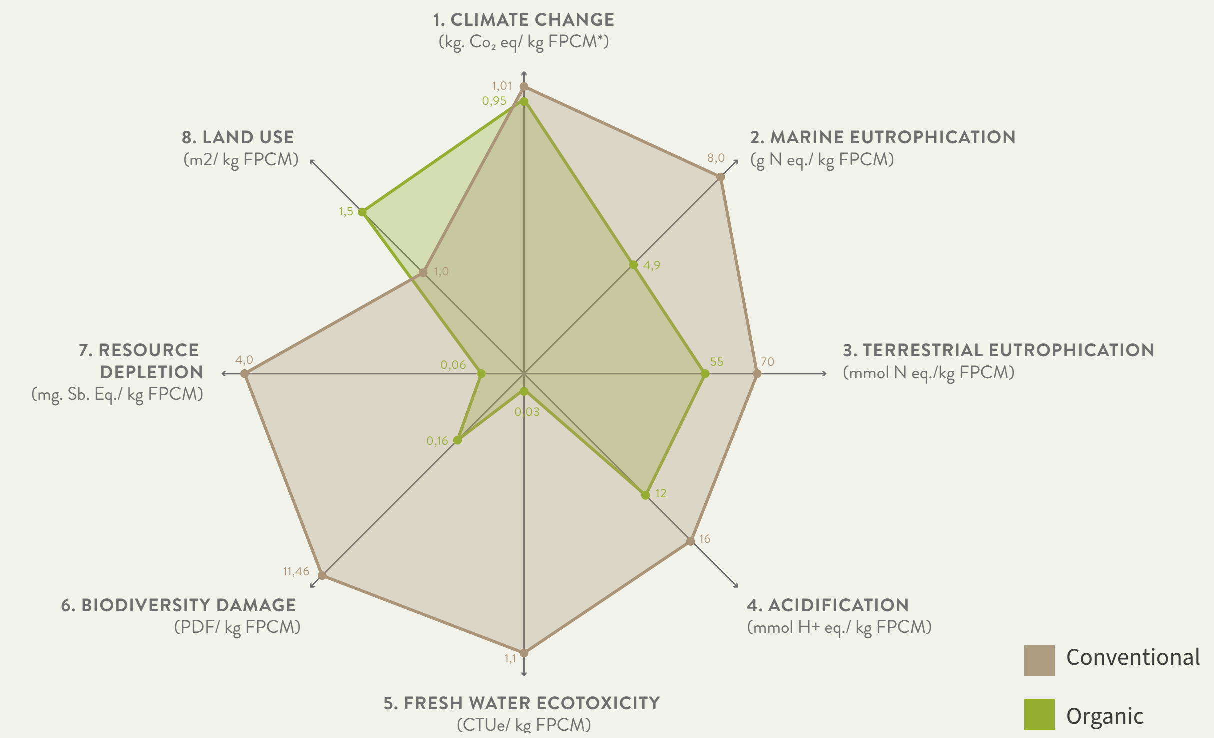
Organic produce therefore also means greener meals, where vegetables, cereals and legumes play the main role, and meat is a supplement, enricher or a luxury that we indulge in.

If you look at the total environmental impact, organic farming has clear advantages in terms of resource consumption, biodiversity, drinking water, the marine environment, animal welfare etc.



## ORGANIC PRODUCTS PERFORM ON MANY PARAMETERS

The figure below illustrates the total picture, by showing a number of the environmental impacts of organic and non-organic milk production in Denmark.




**1. ORGANIC FARMING HAS LESS CLIMATE IMPACT**
Emissions of $CO_2e$ per kilogram of milk are slightly lower in organic milk production than in conventional production. The researchers have included carbon storage in their calculations. This gives organic farming an advantage, because there is a high proportion of grass in the crop rotation on organic farms.

**2. ORGANIC FARMING DISCHARGES FEWER NUTRIENTS INTO THE SEA**
Less nitrogen is released into the aquatic environment from organic farming. This is an advantage because nitrogen increases algae growth and causes oxygen depletion in the oceans. This is because fewer livestock are used in organic farming, and less manure is spread on fields than in conventional farming.

**3. ORGANIC PRODUCTION RELEASES FEWER NUTRIENTS INTO NATURE ON LAND SURROUNDING FIELDS**
Organic farming uses less fertiliser, and organic livestock spend time outdoors. This means less ammonia evaporation and thus less impact on nature around cultivated fields.

**4. ORGANIC FARMING IS LESS HARMFUL TO SOIL ORGANISMS**
There is less acidification from organic production because it uses less fertiliser, and absolutely no artificial fertiliser. Acidification can harm plants and soil organisms and creates a greater need to add lime.

**5. ORGANIC PRODUCTION IS BETTER FOR WATERCOURSES AND LAKES**
Organic farming does not use pesticides and therefore does not pose the same risk to water quality and living organisms in various aquatic environments.

**6. ORGANIC FARMING IS BETTER FOR BIODIVERSITY**
Organic production has a less harmful impact on biodiversity on arable land.

**7. ORGANIC FARMING USES FEWER OF THE EARTH'S RESOURCES**
The study notes that organic production imports less animal feed and that no fossil energy is used for the production and transport of artificial fertilisers.

**8. ORGANIC FARMING HAS LOWER YIELDS**
It takes more land to produce organic milk because the cows have to graze, and the yield from fields is lower in organic farming because less fertiliser is used. But this also helps reduce the climate impact, as there are fewer livestock in organic production and less leaching of nitrogen into the aquatic environment.

*Sources: Knudsen, M. T., Dorca-Preda, T., Djomo, S. N., Peña, N., Padel, S., Smith, L. G., & Hermansen, J. E. (2019). The importance of including soil carbon changes, ecotoxicity and biodiversity impacts in environmental lifecycle assessments of organic and conventional milk in Western Europe. Journal of Cleaner Production, 215, 433-443. https://www.sciencedirect.com/science/article/abs/pii/S0959652618339805*

*Borchiera Martina, De Laurentiis Valeria, Caldeira Carla, Sala Serenella (2023) Comparison of organic and conventional cropping systems: A systematic review of life cycle assessment studies. https://www.sciencedirect.com/science/article/pii/S0195925523001531?via%3Dihub*

# ORGANIC PRODUCTS NEED TO BE USED DAILY IN THE CLIMATE BATTLE

The organic segment has to do better in convenience and be clearer in its climate message. Consumers are focusing more and more on foods that make a contribution to the climate. The products also have to cater to busy daily life.

**BY: VIVIENNE KALLMEYER**
COMMUNICATIONS CONSULTANT
ORGANIC DENMARK

*Photo: unsplash.dk*

Just when we thought that combatting climate change through our shopping habits had been replaced by a pure price focus, attention is returning to the climate issue. Despite the cost-of-living crisis, consumers have not forgotten that they can make a difference through their food purchases, and are demanding that producers and retail chains help them along.

"Climate is still a central issue. We have become accustomed to the debate, and climate is still the top item on the sustainability agenda," says Flemming Birch, analyst and consumer expert at Birch & Birch.

"It is therefore more important than ever that the organic sector carves out a clear role for itself in relation to the climate issue, once and for all, and speaks more clearly to consumers."

> Climate is still a central issue. We have become accustomed to the debate, and climate is still the top item on the sustainability agenda
>
> **FLEMMING BIRCH**
> BIRCH & BIRCH

Too many provisos and complex muddy messages get lost in the debate. While animal welfare, biodiversity and clean groundwater are also very important topics, the climate is at the top of the list for most people in Denmark.

"If the organic farming message is not honed in relation to the climate, there's a risk that consumers will go elsewhere."

**DAILY LIFE NEEDS TO BE EASY**

The time is actually ripe for organic values. Even though inflation has stabilised and most people in Denmark are financially optimistic, the crisis has led to new habits. We are conscious of food waste, high meat prices have taught us to eat less, and the vegetables on our plate are finding new gastronomic forms.

"The world is still uncertain, many homeowners are having to restructure loans at higher interest rates and everyone knows the price of a kilowatt hour. So the new common sense and anti-consumerism have become commonplace," explains Flemming Birch.

"But at the same time as we want to be sustainable, we would prefer not to change our habits. The products we buy must therefore fit into our daily routine, and convenience therefore remains important."

He predicts that the growth potential for organic products in convenience lies in products that make homemade cooking easier. These could be pre-cut vegetables, pre-soaked legumes or cooked and tasty plant-based products that are better and easier to prepare than the meat that we are trying to cut down on.

**SPREAD THE GREEN AROUND**

Several studies in recent years have shown that Danish consumers want to eat greener and more sustainable meals, but that habits are hard to change. It also does not help that plant-based foods are often grouped in their own section in stores and marketed as 'veggie' or 'vegan'.

"They should instead be placed alongside the other products, so customers discover there is an alternative product that is not reserved for the most zealous, or people who profess a particular way of eating," says Flemming Birch.

It appears that the value attributed to meat is changing. The most conscious consumers have already cut down on meat, and this trend will expand in the coming years. It is primarily beef and pork that are less frequently used in dishes. Forget about large roasts, whole roasted suckling pigs and brontosaurus steaks.

**HEALTH IS TO BE TAKEN SERIOUSLY**

There is also a new health focus unfolding. Most people have already become acquainted with intermittent fasting, ice baths and other phenomena in the new self-optimisation trend.

"We are moving on from a time when health had to be within easy reach and the focus was on body positivity. A more masculine trend is creeping in, called Bro Wellness, which is about basing your health on documented knowledge," explains Flemming Birch.

"This focus on the body involves self-discipline in the form of dietary supplements, biohacking and the pursuit of purity, where organic produce can also play a key role."

Overall, the modern consumer is preoccupied with the climate, having an easy daily routine and good health, but is also weary of navigating messages and documentation. The key task for the organic segment is to continue to communicate the values and inherent benefits in a clear way.

# ORGANIC PRODUCTS ARE A KEY ESG PARAMETER

Grocery chains and food companies alike can use organic products as a positive contributor when documenting and setting goals for sustainability through ESG reporting.

**BY: VIVIENNE KALLMEYER**
COMMUNICATIONS CONSULTANT
ORGANIC DENMARK

The largest companies and grocery chains are already in the process of documenting sustainability and social responsibility under the ESG reporting requirement that applies to listed and large companies from this year. Even though it is initially only the large companies that have to start setting goals and listing actions for how they will reduce negative impacts on people and the environment, their suppliers also play a key role.

"ESG has come to all companies, because reporting must be done for the entire value chain, thus including suppliers. It is therefore vital for your business that you have transparent production, have the risks in your business model under control, and engage in dialogue with your customers and clarify their needs," says Mette Toftegård Rasmussen, Senior Manager at the BDO consulting and auditing company.

She emphasises that companies that have their documentation in order and take measures that support responsible behaviour may have a competitive advantage in the future.

"Companies that work with organic products are used to having well managed value chains and being in close dialogue. When working with ESG, it will also be necessary to initiate development projects to reduce any negative impacts on the environment. This will benefit both your customers' and your own ESG report," she says.

A new business opportunity
The organic sector and companies that produce and sell organic products thus have a slight head start – not least because the principles organic farming is based on play a strong role in the mindset behind ESG.

"The more organic products a store offers in its range, the better it can document in its ESG report that its activities have a low impact on a number of parameters, and that it takes responsibility for these," says Mette Toftegaard Rasmussen.

So rather than seeing ESG as yet another burdensome documentation requirement, one should view the requirements as a new business opportunity – and a chance to become more aware of how your company can contribute to reducing negative impacts on both the environment and people, and rectify harm that has already been done.

**MORE THAN A HYGIENE FACTOR**

The organic sector has the advantage that there is already an official labelling scheme, and thus a set of rules that must be observed and documented. But more is needed, and the Four Organic Principles are a good starting point.

"ESG is far more than a hygiene factor – just like the organic principles. The task will be to map these principles into ESG, and start with all the good things you are doing but not currently documenting," she says.

**FOCUS ON THE BIG PICTURE**

Companies must work with all three ESG indicators. This means, for example, documenting how you work with waste, setting goals and defining methods for the future, whether you buy and use raw materials that would otherwise have been thrown away, or have goals of working with a higher proportion of organic products. But it also involves a greater focus on social responsibility in relation to employees.

"Working systematically with ESG means focusing on both the positive and negative impacts of running a business. Working systematically and with documentation makes it clear where you are making good progress, and where you need to take action and initiate activities," explains Mette Toftegaard Rasmussen.

"We entering a new stage in our work with sustainability, and the organic sector must find a way to operationalise its social responsibility using the existing tools."



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Working systematically with ESG means focusing on both the positive and negative impacts of running a business.

**METTE TOFTEGAARD RASMUSSEN**
SENIOR MANAGER AT BDO

**ESG IS EXPECTED TO BE CENTRAL** TO COMPANIES' ABILITY TO ATTRACT FINANCING AND INVESTORS, GROW AND RECRUIT LABOUR IN THE FUTURE.

**ESG STANDS FOR:**

**Environmental**
– the company's environmental and climate impacts and initiatives. For example, energy and resource consumption and biodiversity efforts.

**Social**
– social impacts and initiatives, such as gender equality, absence due to illness, workplace injuries and stress.

**Governance**
– management and board issues, such as whistleblower schemes and supplier screening.

For listed companies with more than 500 employees, the new requirements apply from the 2024 financial year. For listed and non-listed companies with more than 250 employees (class C companies), the requirements apply from the 2025 financial year, while listed companies with less than 250 employees must comply with the requirements from the 2026 financial year (except for micro-enterprises).

The sustainability reporting must be covered by an auditor declaration, and follow the company's financial year.

**WHY ESG?**

ESG is part of the EU's Corporate Sustainability Reporting Directive (CSRD), and is one of the instruments to ensure that financial actors such as banks, investors and customers can learn about a company's impact and initiatives on a wide range of sustainability parameters in relation to investment and ownership. The goal of the EU's sustainable finance package is to ensure that capital and investments in Europe are brought into play where there is the most sustainability in economic activities, based on the goal of ensuring a $CO_2$-neutral EU by 2050.

# ORGANIC PRODUCE **CONSUMERS**

In 2023, Danish consumers were once again the world's most organic-oriented consumers and purchased the most organic products. According to Kauza, the average organic share among Danish consumers was 11.7% in 2023, but there were major demographic differences.

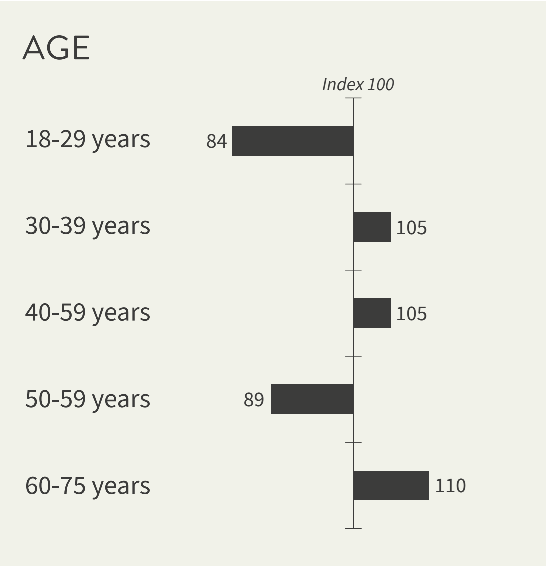
The figures below show how the demographic segments that spend the largest share of their grocery budget on organic products look in terms of age, geography, household size, and whether there are children in the household. Positive index figures show, for example, that the group of 60-75-year-olds in Denmark has a higher organic share (with an index of 110) than people in Denmark in general, but are strongly followed by the 30-39 and 40-49 age groups.

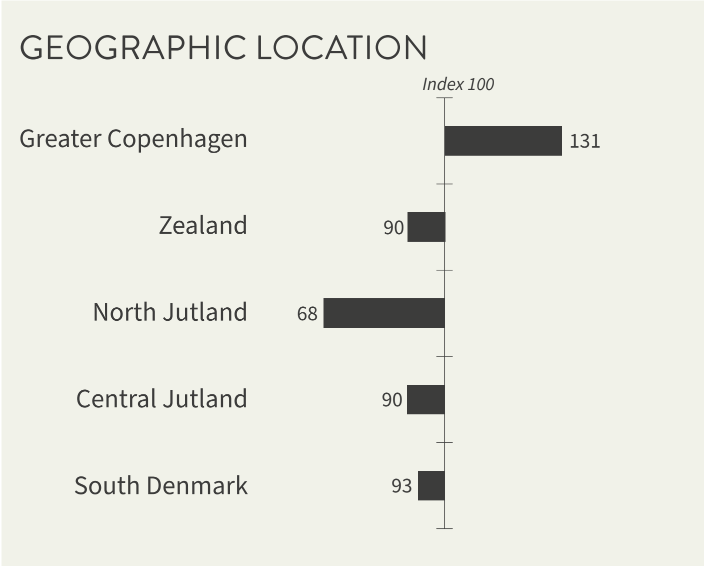
The traditional perception has been that organic produce is sold in Copenhagen and Aarhus, which is also correct, but not the whole story. The Greater Copenhagen Area stands out positively, but the other regions, with the exception of North Jutland, are very close with index values of 90-93.

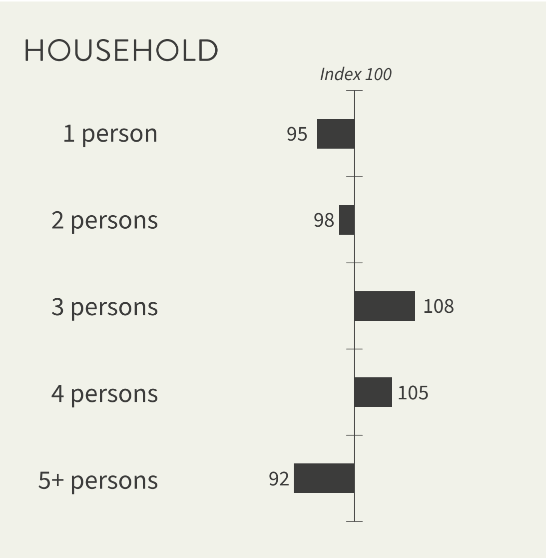
In terms of family types, families with children under eight years of age and older couples without children at home are the core groups for organic produce. Consumption of organic products fell during 2023 among the group of families with children under eight, affecting total organic sales. But there have been positive signs in Q1 2024, where families with children under eight and older couples without children at home began to increase their consumption of organic food.

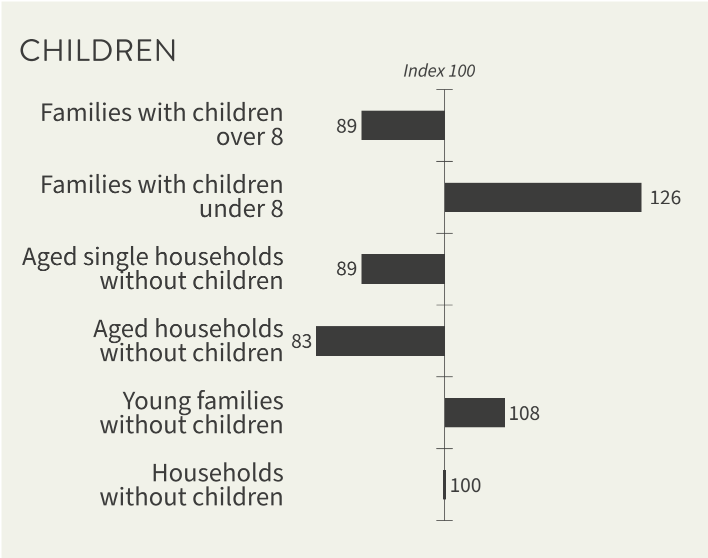
The overall conclusion is that organic food is being bought throughout Denmark, and by all types of consumers.

**SHARE OF ORGANIC PRODUCTS IN FOOD BUDGET BY DEMOGRAPHIC SEGMENT 2023**




*Source: Kauza shopper data*

# SUPER AND HEAVY ORGANIC CONSUMERS ARE ATTRACTIVE CUSTOMERS

On average, 65.5% of Danish consumers put organic food in their shopping basket every week in 2023. However, there were wide variations in the percentage of their food budget Danish consumers spent on organic food. Consumers who spent more than 30% of their food budget are called Super Organics. Although they are the smallest group, making up only 6% of consumers, they accounted for 26% of organic sales.

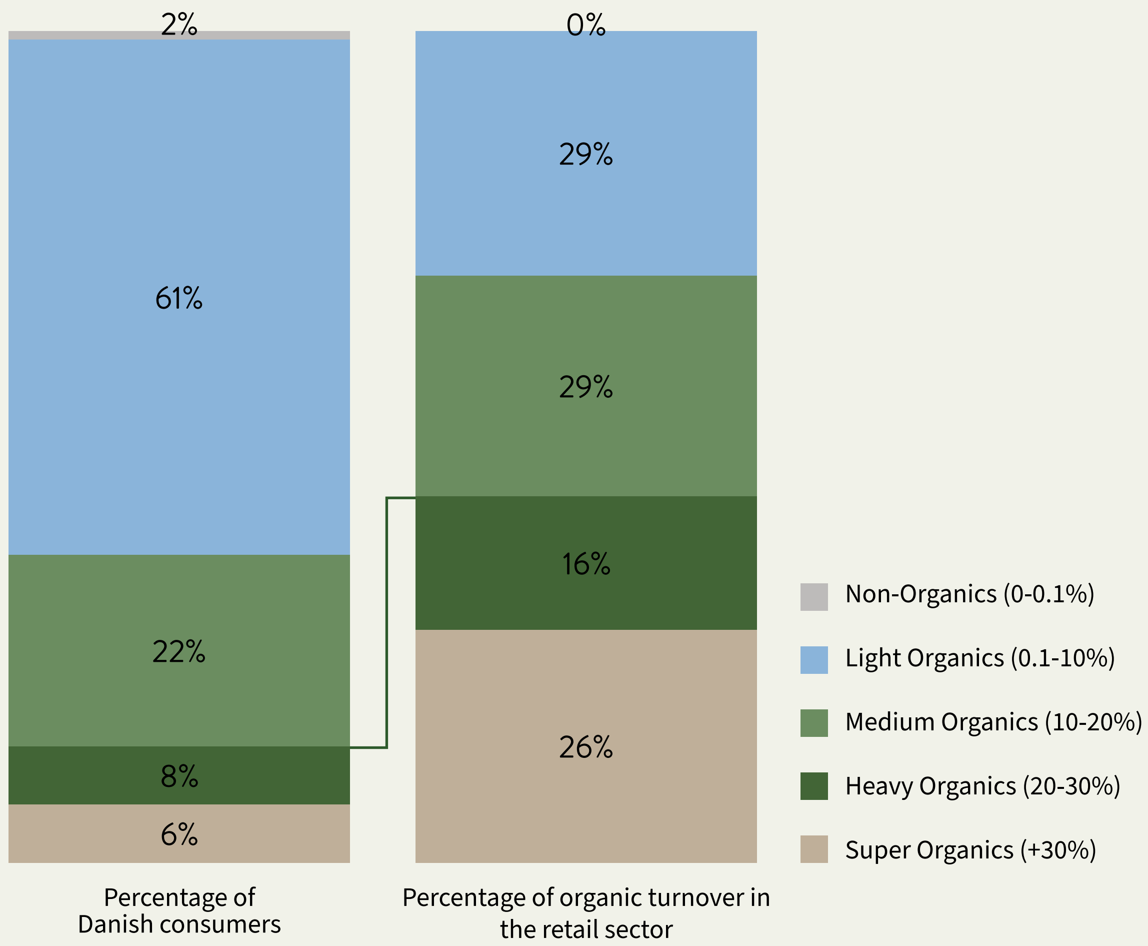
The two most attractive consumer groups in the organic market are Super Organics and Heavy Organics. Together, these made up 14% of Danish consumers, but accounted for 42% of organic sales in 2023.

A characteristic of these two groups is that they spend more money on groceries than Danish consumers on average.

There are big differences in which behavioural segments shop in which chains. Typical customers in the discount stores are Light and Medium Organics, which together accounted for 63% of the organic sales in discount segment.

Super and Heavy Organics accounted for 50% of organic sales in the supermarkets. Their organic product range must therefore support both basic purchases and more luxurious categories in order to appeal to the two most attractive groups of organic customers.

**BEHAVIOURAL SEGMENTS' SHARE OF DANISH CONSUMERS AND ORGANIC SALES IN 2023**




*Source: Kauza shopper data*

# ORGANIC EXPORT MARKET

**DENNIS HVAM**
INTERNATIONAL MARKET DIRECTOR
ORGANIC DENMARK

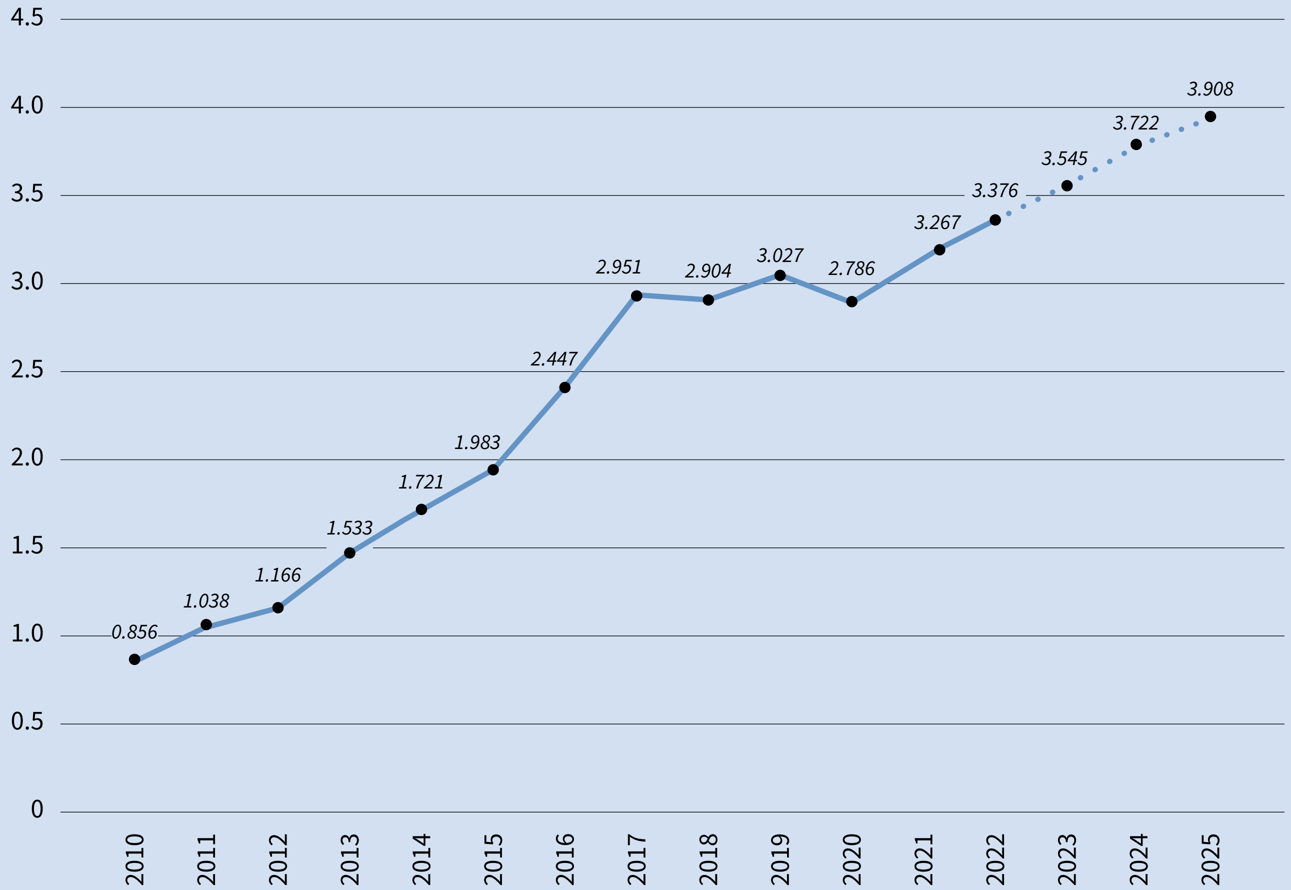
We are pleased that exports of Danish organic produce rose in 2022, a year marked by the war in Ukraine and rising inflation, which caused stagnation in the organic domestic market.

This confirms to us that Danish organic products have a strong position abroad. Given that we can achieve growth in exports in such challenging times, I'm extremely positive about the future of organics. When we talk to people abroad, they say that organic farming is the future, and the large growth rates in export figures will return, but it is important that we continue the focused work on export markets that Danish companies and Organic Denmark have been engaged in for many years.

It is important that we hold politicians to their EU goal that a quarter of agricultural land should be organic by 2030. There are many who have witnessed our success, and if we rest on our laurels, there is a risk others will fill the gaps in the market.

**GROWTH IN ORGANIC EXPORTS 2010-2025**

DKK billion




*Source: 2010-2022 Statistics Denmark. 2023-2025 estimates by Organic Denmark*

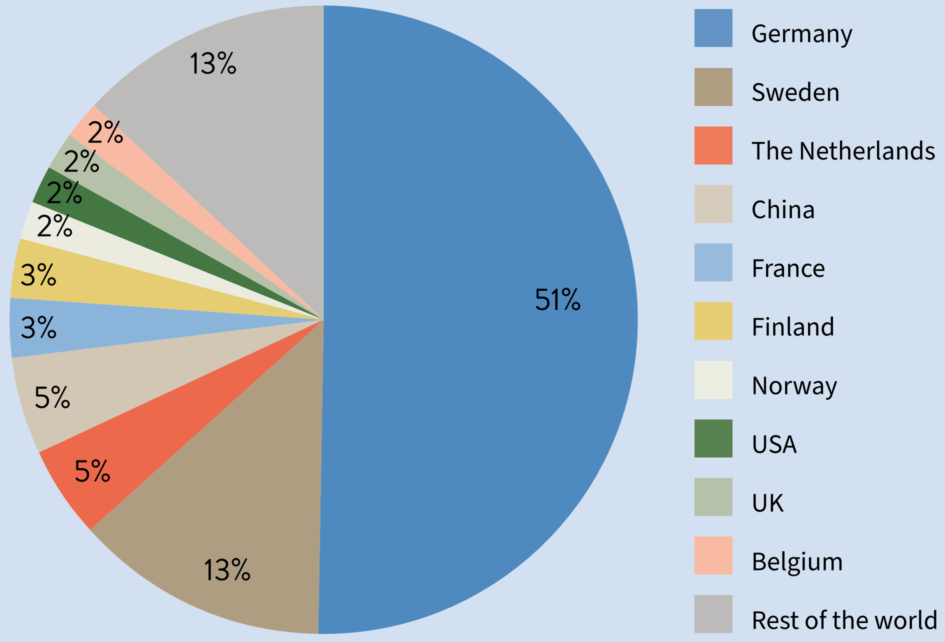
## TREND IN EXPORTS OF ORGANIC PRODUCTS

Statistics Denmark calculated organic food exports at DKK 3.4 billion in 2022, a slight increase compared to 2021.

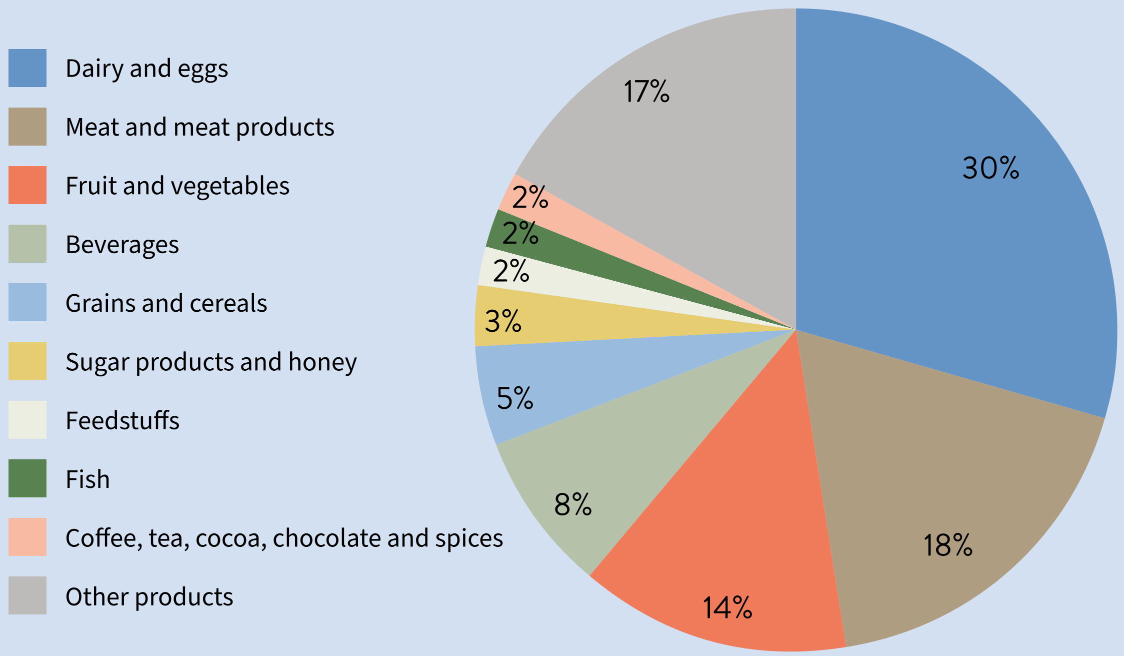
Half of organic food exports, measured by value, still go to Germany and Sweden, which together purchase 64%.

The two largest product groups are still dairy products and eggs and meat and meat products, which together accounted for 48% of the total value. This in part because these two product groups are largely sold in the B2B market for further processing.

**ORGANIC EXPORTS BY COUNTRY – 2022**




**ORGANIC EXPORTS BY PRODUCT GROUP – 2022**

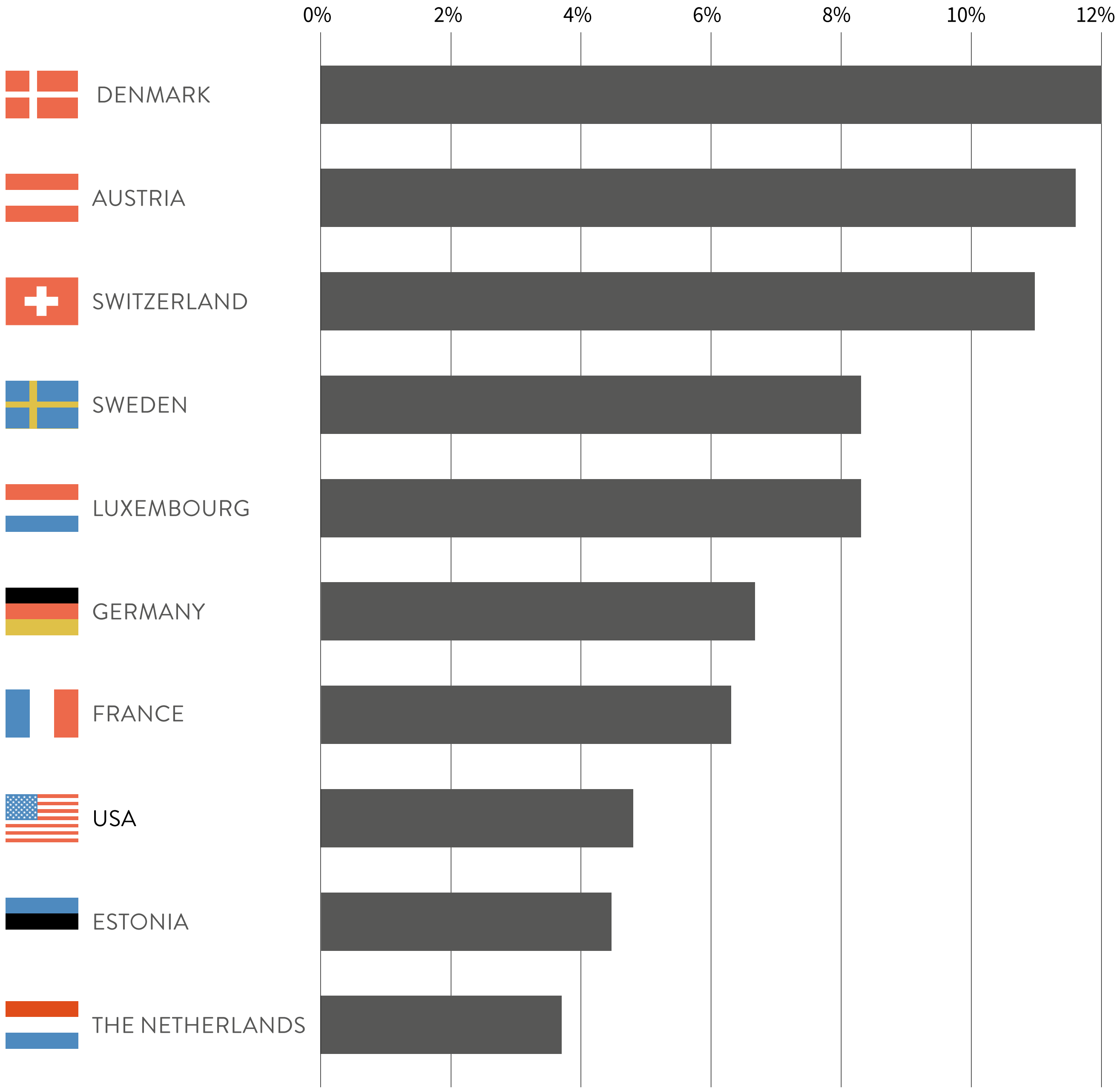



*Source: Statistics Denmark*

# ORGANIC
# WORLD CHAMPION

Denmark is in first place as the organic world champion according to the latest report from FiBL, based on data collected from 2022. Austria and Switzerland are also vying for the title, and are the only two countries below that increased their organic market share from 2021 to 2022. Germany is still the largest market for organic food exports – but here the organic market share fell by 0.7 percentage points in 2022.

**ORGANIC MARKET SHARE IN RETAIL TRADE 2022 (%)**



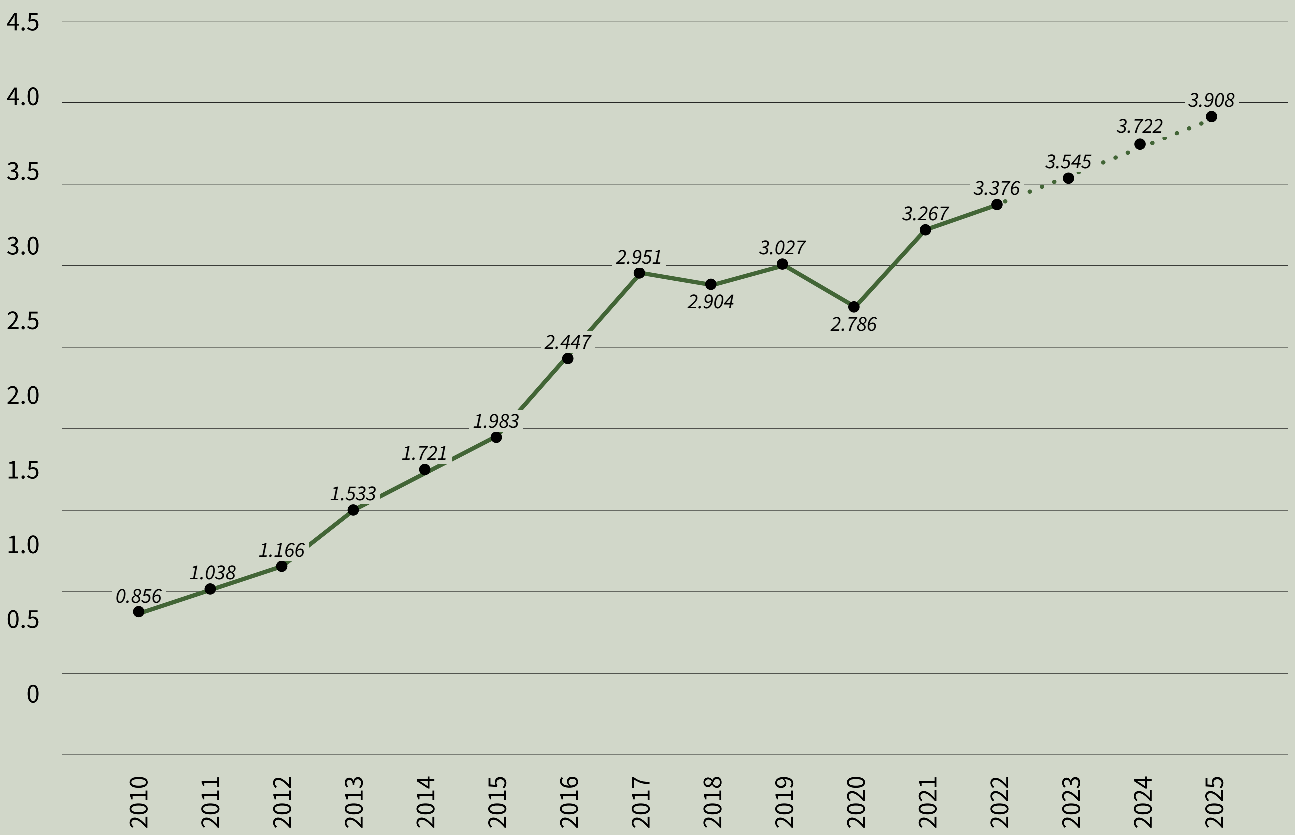

*Source: Statistics Denmark*

# SALES OF ORGANIC PRODUCTS IN **FOODSERVICE**

According to the latest figures from Statistics Denmark for sales of organic food in the foodservice sector, 2022 was a record year with growth of 41%. Organic sales were DKK 3 billion, and the organic market share was 13%. The organic market thus not only recovered in the foodservice sector, but also grew measured by value. Growth is expected to continue in both 2023 and 2024.

**SALES IN FOODSERVICE 2010-2025**

DKK billion




*Source: 2010-2022 Statistics Denmark. 2023-2025 estimates by Organic Denmark*

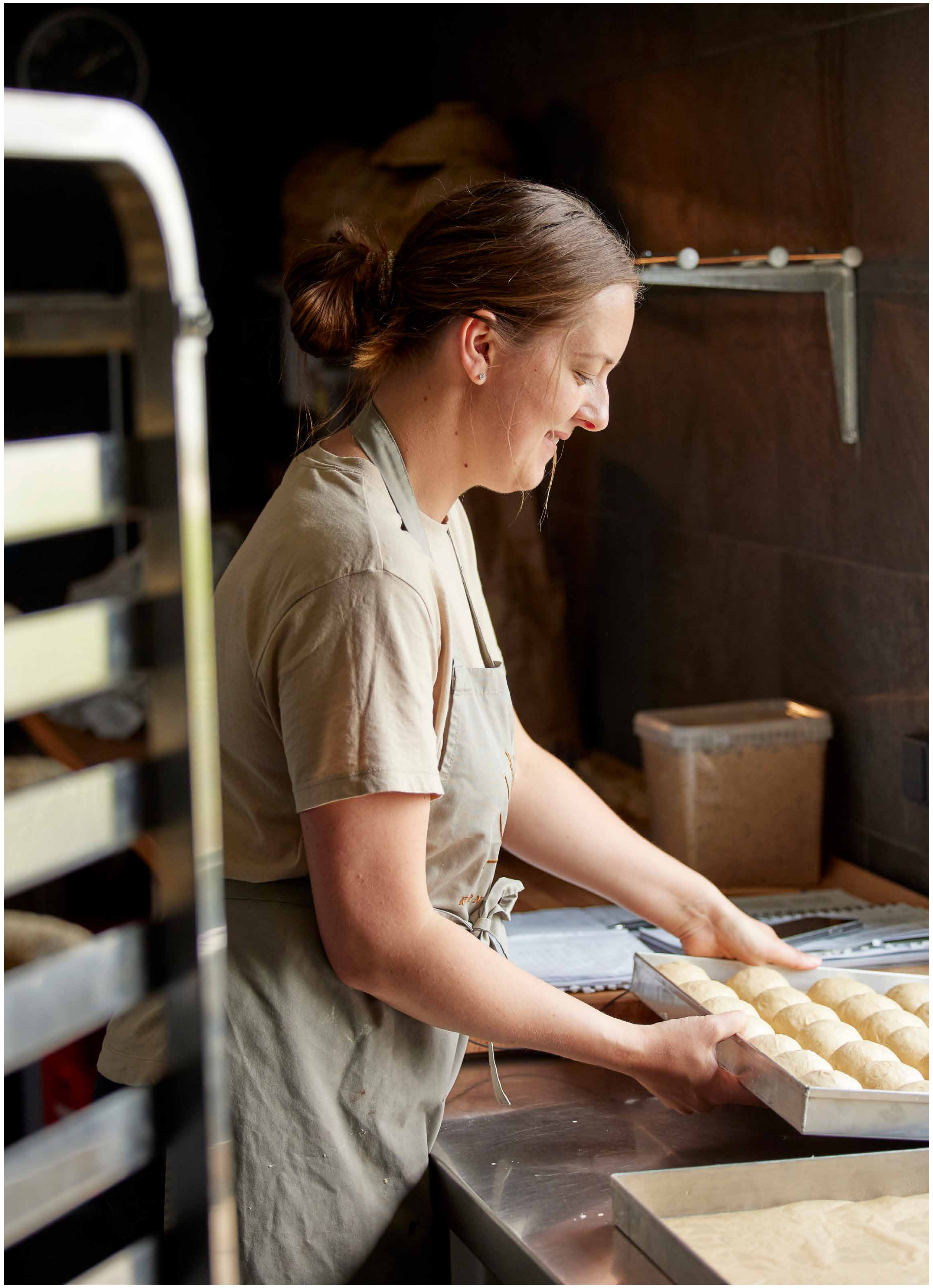
# ORGANIC SEGMENT THRIVING IN FOODSERVICE

**TORBEN BLOK**
MARKET DIRECTOR, FOODSERVICE
ORGANIC DENMARK

The organic segment is doing very well in the foodservice sector right now. At the same time, organic produce needs to profile itself in relation to the climate and sustainability agenda, and we must motivate players to fully leverage organic products – both in private and public professional kitchens. Organic produce has all the documentation needed to make perfect ESG accounts.

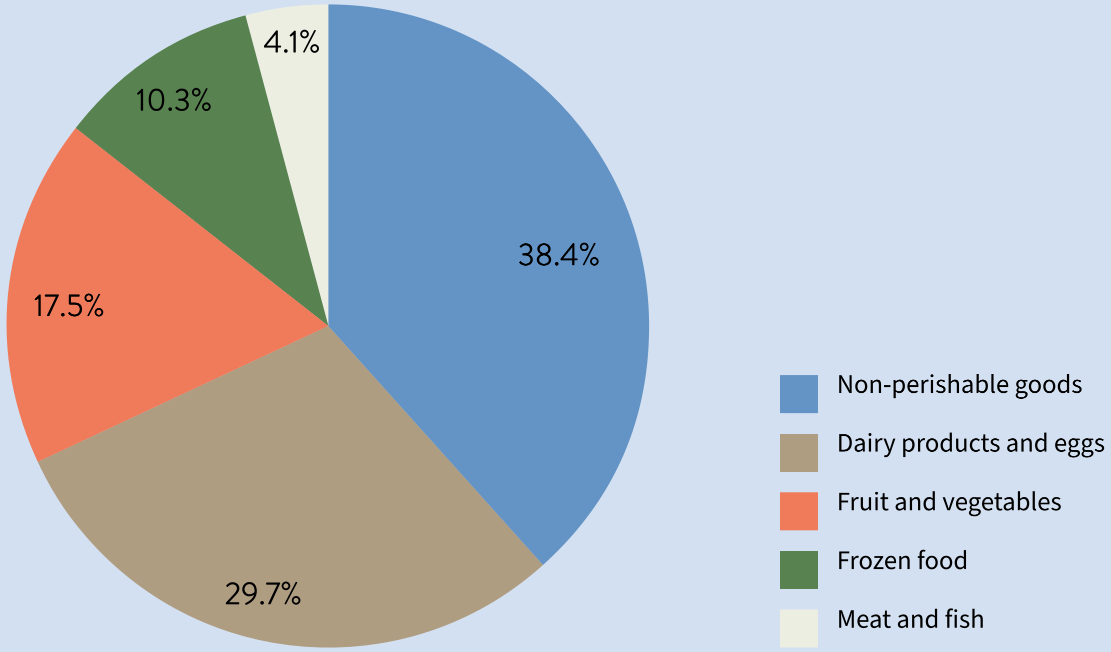
We expect the organic segment to continue growing in the coming years, because we are seeing players in both the private sector and the municipalities move from no organic produce to 60%, or even on to 100%. This is a sign of drive and determination in the sector right now.

For example, Organic Denmark is involved in helping four municipalities change their consumption. The municipalities of Halsnæs, Jammerbugt, Faxe and Nyborg are working towards a 30-60% organic food share by the end of the year, which would qualify them to apply for the bronze Organic Dining Label. We are also seeing private sector canteens follow suit, because offering organic meals is a strong competition parameter. The private hotel chains are also coming on board.



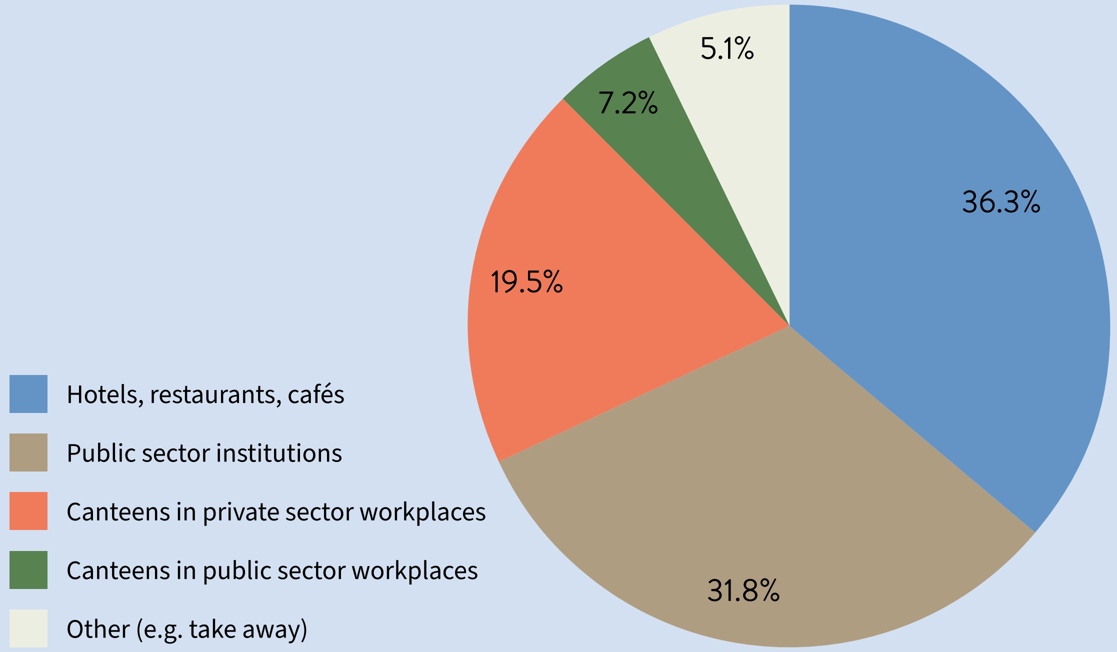
**ORGANIC SALES BY PRODUCT GROUP – 2022**

It is non-perishable products that are the organic powerhouse in the foodservice industry, followed by dairy and eggs. This is in contrast to organic sales in the retail market, where the fruit and vegetable category is the main driver, followed by dairy.




**ORGANIC PRODUCT SALES BY CHANNEL – 2022**

In 2022, hotels, restaurants, cafés, etc., moved into the lead position in terms of share of organic sales in the foodservice sector, closely followed by the public sector institutional kitchens (hospitals, childcare centres, institutions, etc.) Together, these two groups accounted for 68.1% of total organic sales in the sector, and are key drivers for organic produce.

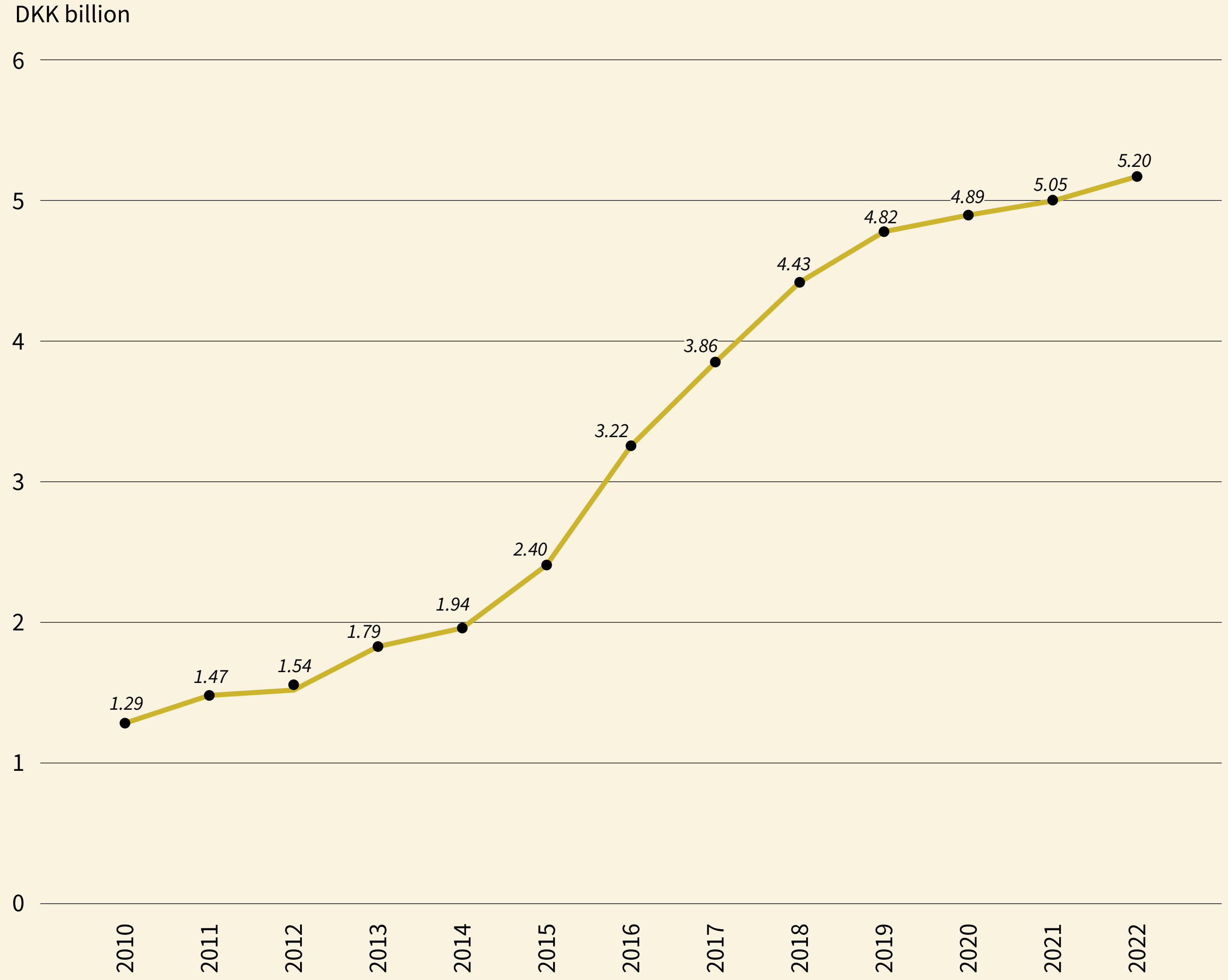



*Source: Statistics Denmark*

# ORGANIC FOOD **IMPORTS**

As a natural consequence of the slowdown in the domestic organic retail market, there was also a slowdown in imports of organic food, which ended at DKK 5.2 billion in 2022. The minor growth compared to 2021 is due to rising commodity prices for grain and feed, as well as more imports of cheaper organic food as a result of Danish consumers' greater price awareness in 2022.

**GROWTH IN ORGANIC FOOD IMPORTS – 2010-2022**




*Source: Statistics Denmark*

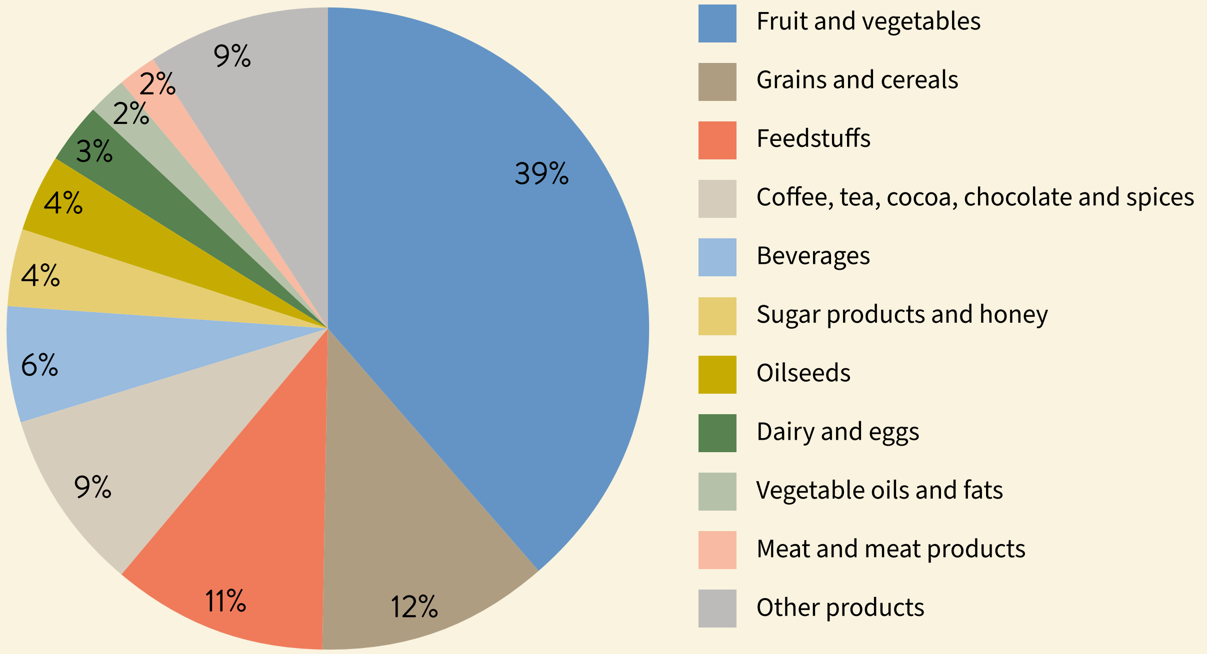
**ORGANIC IMPORTS BY PRODUCT GROUP – 2022**

Imports of organic food and feed came primarily from Germany, the Netherlands and Italy. The organic import share from these countries remained stable, while the export share from Spain dropped from 15% in 2021 to 11% in 2022.

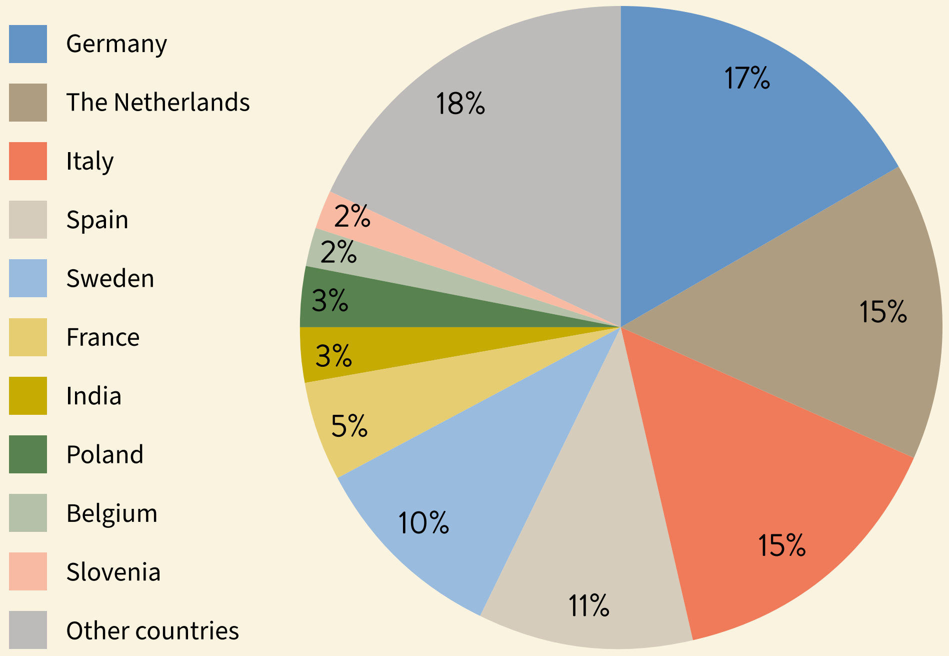
By far the largest category in imports was fruit and vegetables. This is in part because there are many products in this category that we cannot produce ourselves, such as bananas and citrus fruits. Season and Danish consumers' price awareness also play a vital role in this category.

Cereals, cereal products and feedstuffs together account for 23% of imports in terms of value, and competitive prices for oats for oatmeal, bread grains and protein-rich feed played a role here.

There were also periodic shortages of fruit and vegetables and cereals and cereal products.




**ORGANIC IMPORTS BY COUNTRY – 2022**




*Source: Statistics Denmark*

# ORGANIC FARMLAND

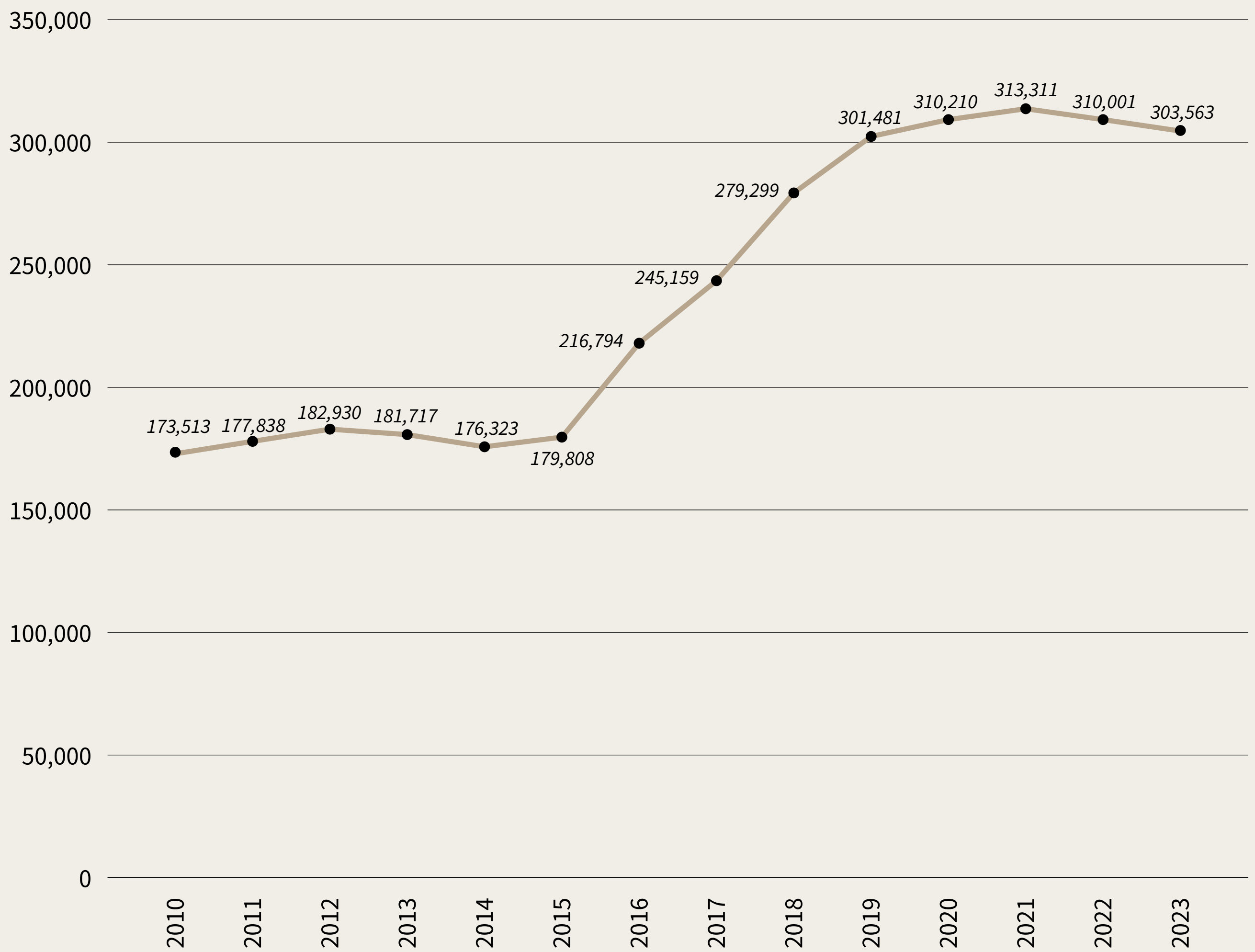
The total area of organic farmland dropped slightly again in 2023 to 303,563 hectares, compared to 310,001 in 2022. A decrease of approx. 2%. Overall, organic farmland accounted for 11.4% of total farmland in Denmark at the time of the Danish Agricultural Agency's statement of 31 May 2023.

The number of organic farms that have or had applied for organic authorisation decreased correspondingly from 4,095 in 2022 to 3,960 in 2023.

In particular, production of organic broiler chickens fell by 63% and production of organic piglets by 11%. The reductions happened in various ways. Some farms totally ceased operation, others returned to conventional farming and yet others were sold to neighbours who converted them to conventional farming.

It will therefore require hard work in the coming years to achieve the government's aim doubling the area of organic farmland by 2030. The goal is for organic farmland to make up 21% of total Danish farmland.

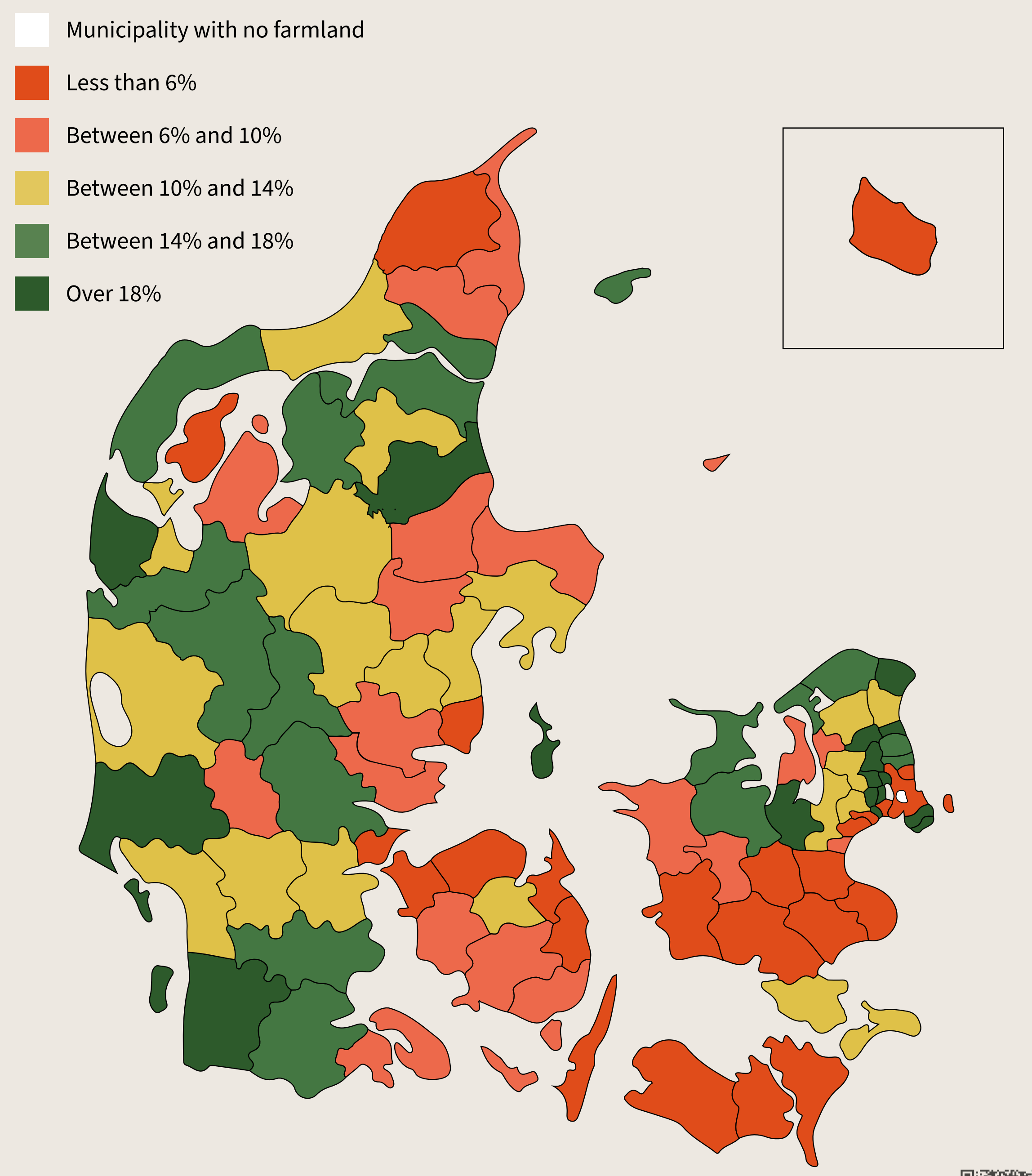
**TOTAL ORGANIC FARMLAND IN HECTARES – 2010-2023**




*Source: The Danish Agricultural Agency*

# MAP OF ORGANIC DENMARK

There are major variations in the proportion of farmland converted to organic production in the municipalities. The map shows the proportion of total farmland that is organic farmland.




*Source: The Danish Agricultural Agency*

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# ORGANIC FARMING IN A NUTSHELL WHAT IS IT ALL ABOUT?

- **The term ‘organic’ is often used synonymously with ‘ecology’, the branch of science dealing with the relationship of living things to their environments.** In practice, this means that the farmer works based on a holistic mindset, carefully considering the food’s journey from farm to fork and striving to create a natural and sustainable cycle.

- **Organic beef and dairy cattle must be on pasture** during the summer half of the year, from April to November. The animals must be able to move freely, graze and behave naturally. They must also have access to shade and shelter to protect them from the elements.

- **All organic livestock must have access to outdoor areas** and to shelter. Stables for shelter and winter use must allow the animals to move freely and naturally.

- **Organic livestock must not be given hormones** or other substances that can accelerate growth or alter their natural reproductive patterns. This ensures that the meat from organic animals is free of unnecessary chemicals and hormone residues.

- **Organic livestock must be fed organically grown feed.** Their feed must not contain artificial additives, pesticides or genetically modified organisms (GMOs).

- **Organic broilers live twice as long** as conventional broilers because they grow more slowly. The slow growth is better for the chicken’s welfare and results in better taste and meat texture.

- **Livestock play an important role in organic farming**. They are valuable producers of natural nutrients when they eat grass and fertilise the soil with their manure. The sustainable cycle promotes fertile soil and stimulates crop growth, while avoiding the use of artificial fertilisers and chemicals in food production.

- **Livestock are essential for maintaining biodiversity.** By allowing livestock to live in their natural setting, organic farming helps to preserve great diversity among insect, bird and animal species. Farm animals also help to control pests and weeds.

- **Organic crop production is characterised by broad crop rotations.** This means that organic farmers alternate between growing different crops on each field. This reduces the risk of problems with weeds, diseases and pests. The use of pesticides and artificial fertilisers in organic crop production is prohibited.

- **Legumes such as clover, peas and broad beans play a key role** in crop rotation because they can absorb vital nitrogen from the air through symbiosis with specialised bacteria that live on the roots. Since legumes are self-sufficient in nitrogen, livestock manure and other organic fertilisers can be reserved for cereals and other crops that cannot produce their own nitrogen.

- **Use of natural pesticides is permitted** in organic production, but only to control or prevent pest and fungal infestations. They are used on less than 1% of the organic farmland in Denmark – typically in fruit or vegetable production.

- **Organic farmers are continuously working to develop more climate-friendly production**, e.g. through agroforestry, where trees and shrubs are planted in fields with crops. The trees bind carbon in the soil and thus reduce greenhouse gas emissions.

- **Biodiversity on organic farmland is 30% higher** than on conventional farmland because no pesticides are used.

- **Some organic farmers use regenerative methods** to increase soil fertility and biodiversity. Regenerative agriculture avoids disturbing the soil, for example by not ploughing and using plant remains as nutrition to create richer micro-life.

# 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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# IF YOU WANT TO KNOW MORE

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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:

| | |
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| **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.

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

THANK YOU FOR WORKING WITH US TO PAVE THE WAY FOR MORE AND BETTER ORGANIC PRODUCE