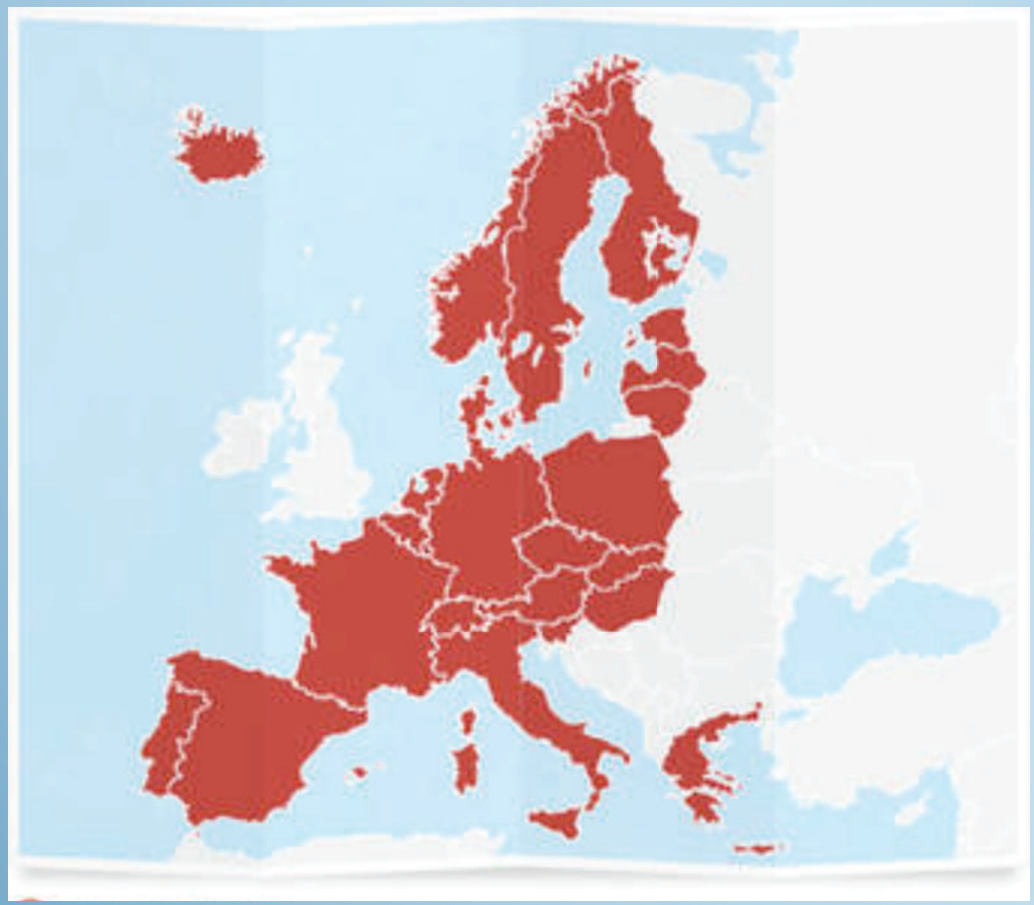
Thanks for inviting me!!

- Med 18 års erfarenhet av ekobranschen

Marknadsseminarium & Ekogalan 2016

@EkowebSverige #ekogalan



- 9,6 bil. inhabitants
- 3 biggest area in EU
- 73 000 farmers
- Appr 15-20 % have some kind of organic produktion

This is Ekoweb

- 18 years in organic business
- We provide information about the organic market
- Unpolitical, commersial, privat owned
- www.ekoweb.nu
- Magazine (print, 73 000 ex) 10 nr 2016, Newsletter (2000 sub.) market seminars, consulting, international partner
- Organic Bransch day in Stockholm & Organic galaevening 26 januari 2017 (no 9)

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Ekowebs sayings and conclutions:

”If no one asks – no one will know!”

”Better to estimate and give a fast answer, then serch the perfect one and never come whith an answer”

”A fast, functioning reporting of marketstatistics are the base in all market developement!

Dagens rubrik:

Developement in the swedish organic sektor

&

swedish organic farming

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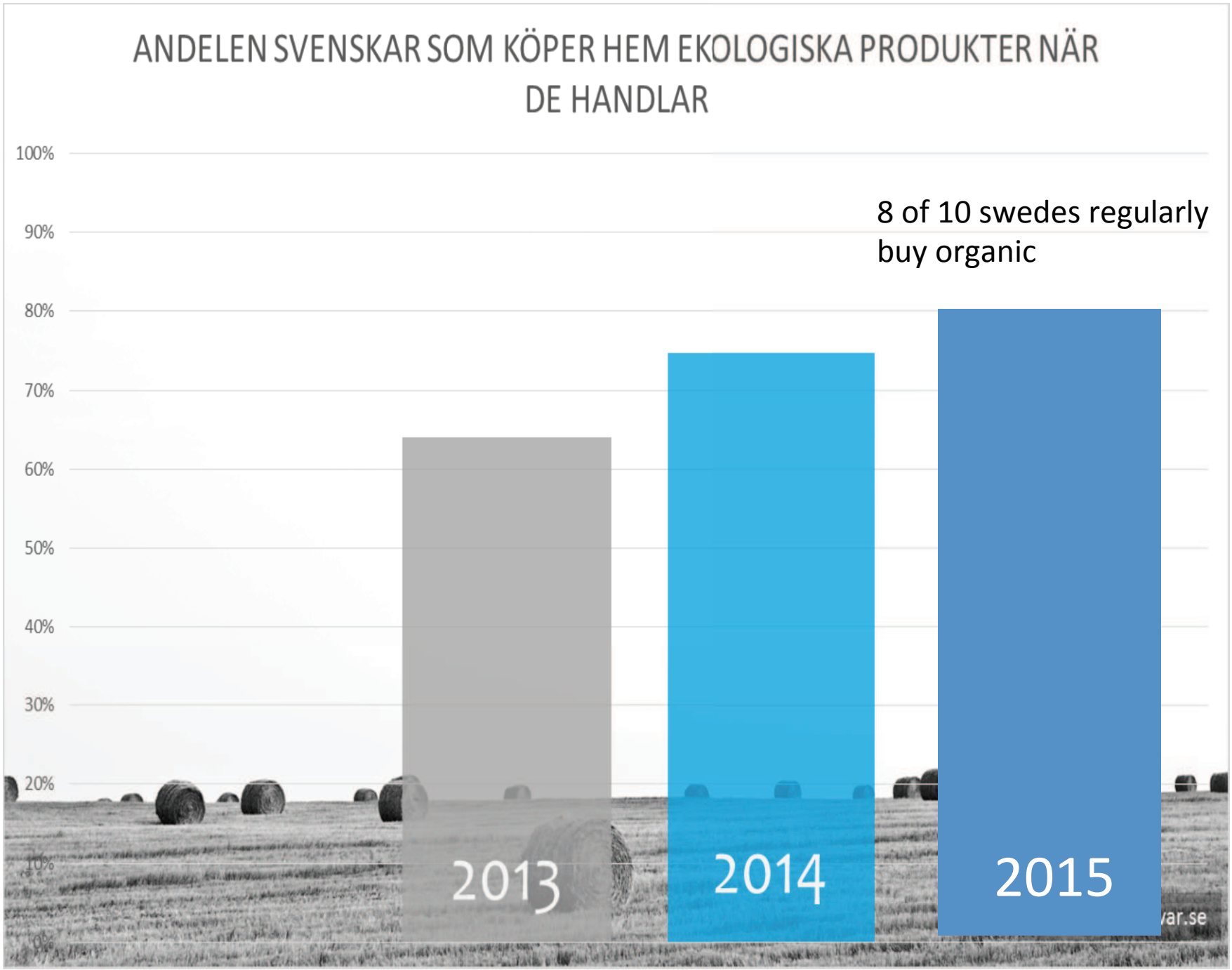
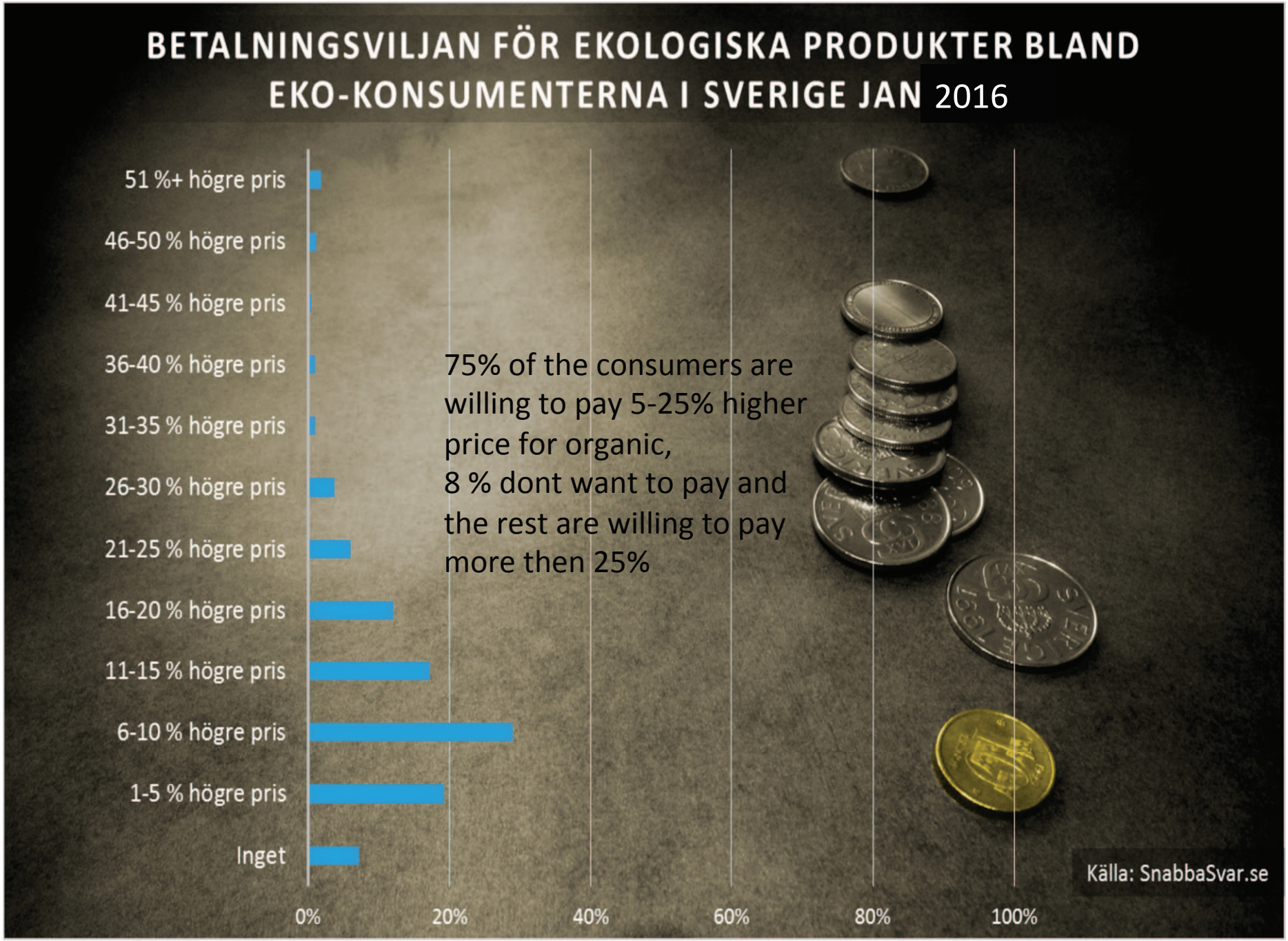
”We notice a big change of view among the swedish consumers. They ask ”**Why not** organic” instead of ”**Why** organic” It’s a huge differense”


ANDELEN SVENSKAR SOM KÖPER HEM EKOLOGISKA PRODUKTER NÄR DE HANDLAR
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
8 of 10 swedes regularly buy organic
2013
2014
2015


BETALNINGSVILJAN FÖR EKOLOGISKA PRODUKTER BLAND EKO-KONSUMENTERNA I SVERIGE JAN 2016
51 %+ högre pris
46-50 % högre pris
41-45 % högre pris
36-40 % högre pris
31-35 % högre pris
26-30 % högre pris
21-25 % högre pris
16-20 % högre pris
11-15 % högre pris
6-10 % högre pris
1-5 % högre pris
Inget
0%
20%
40%
60%
80%
100%
75% of the consumers are willing to pay 5-25% higher price for organic,
8 % dont want to pay and the rest are willing to pay more then 25%
Källa: SnabbaSvar.se

Summary of the research

- **25 %** will buy more organic 2016(25 procent 2015)
- **70 %** will buy as mutch organic as befor
- **1,5 %** will buy less (2% 2015)
- **5 %** of those not buying organic today, think they will buy organic 2016

Lokal+Organic: Svekologiskt

- The organic consumers want to buy local, they want to have the story!

- Organic and local gives the retail something else to communicate than price

Global research,

bla Nielsen

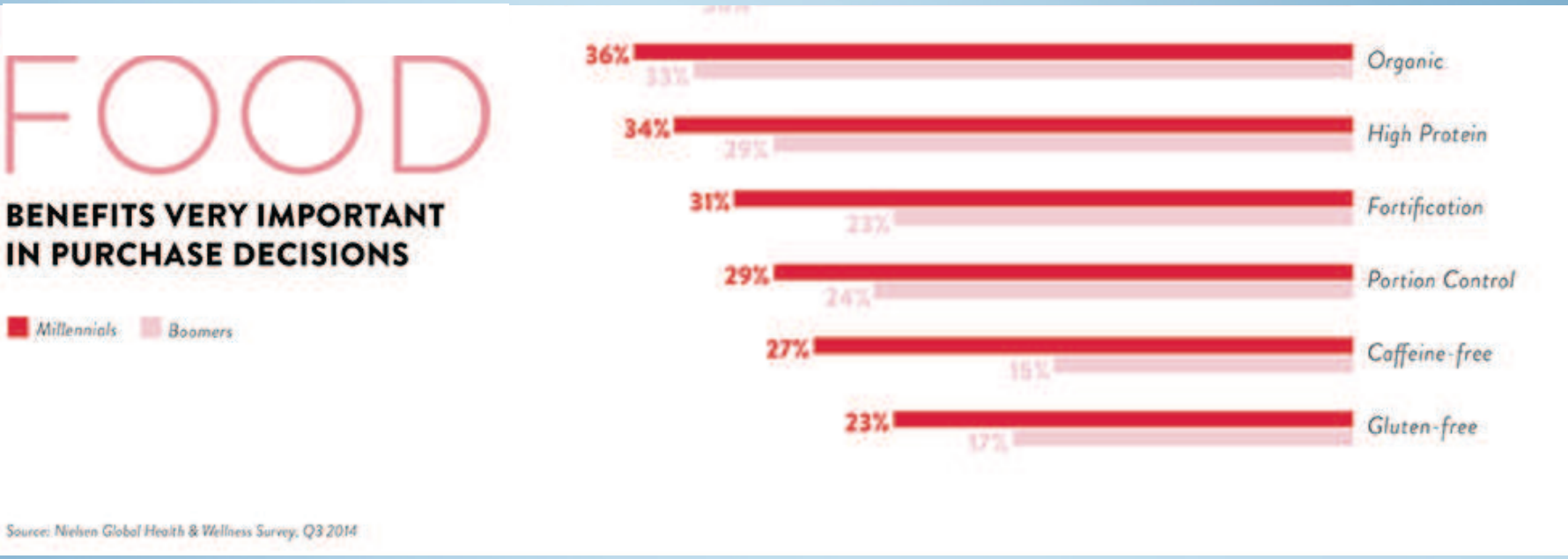
- **50%** of the population on Planet Earth think they are overweight
- Global healthtrend
- 80 % of Generation Z and ”Millenials” are willing to pay extra for healty food (”Silent Generation” 54%)

What is healthy food?

- For older generations: less salt, sugar and fat
- For younger generations Glutenfree, high protein, vegan, Clean Eating, High dence food and organic

FOOD

BENEFITS VERY IMPORTANT IN PURCHASE DECISIONS



Source: Nielsen Global Health & Wellness Survey, Q3 2014

What organic consumers have in common

- Healt: EkoEgo OrganicEgo
- Misstrust aginst big food companies
- Worries about pecticides in food
- Animal care
- Care about the producer

They buy:

Dairy, fruit/vegetables,eggs convinient food, snacks, juice,

They often start whith milk!

The typical swedish organic consumer… can be anyone!

All over the country

In all kind of housholds

In every incomelevel

At all ages

The swedish organic market:

- Consumerdriven
- Attractive consumers (+15 euro)
- Competition in retail
- Easy to buy

Let the numbers speak!

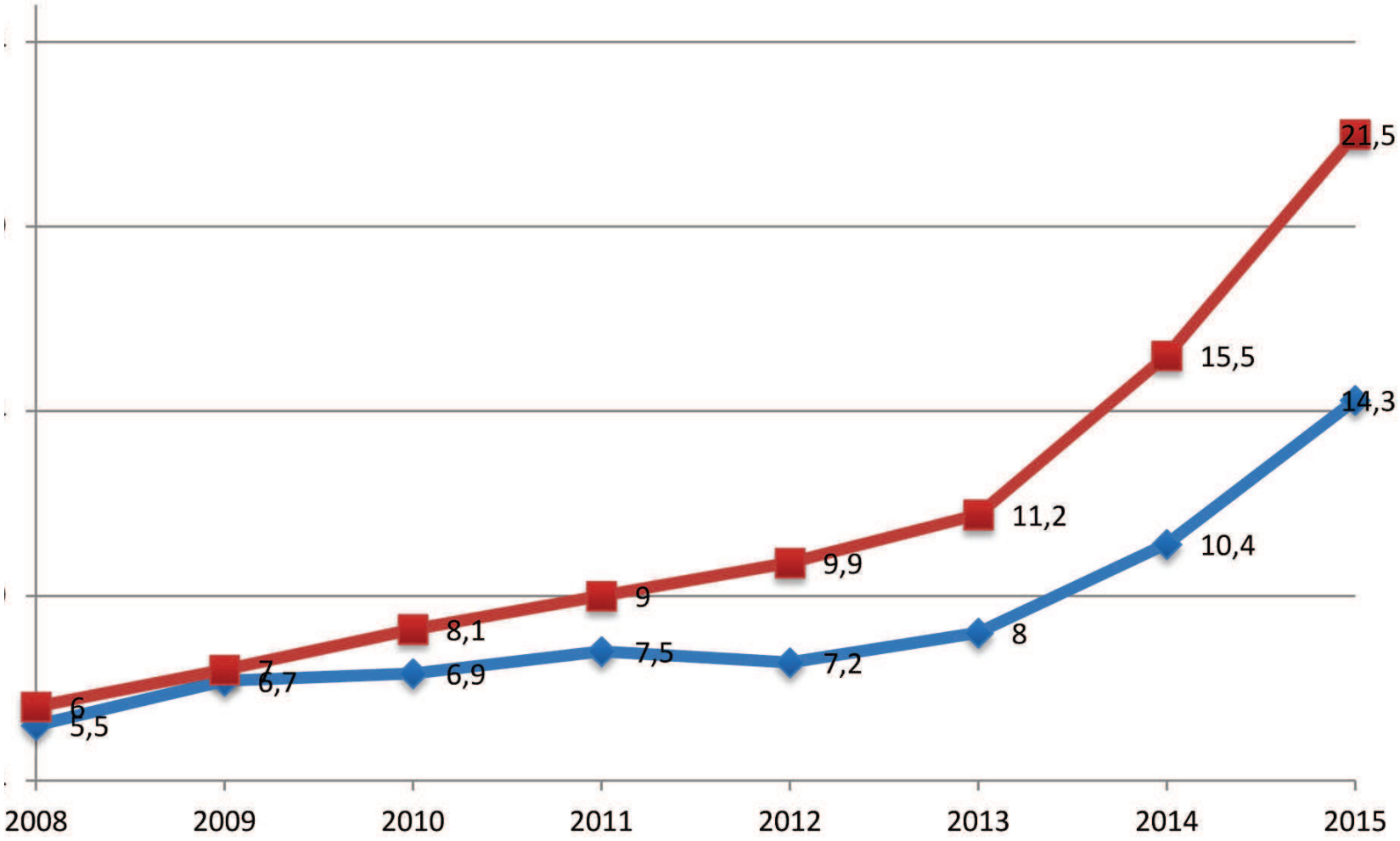
2015 Organic foodmarket gained:

39%

That means….

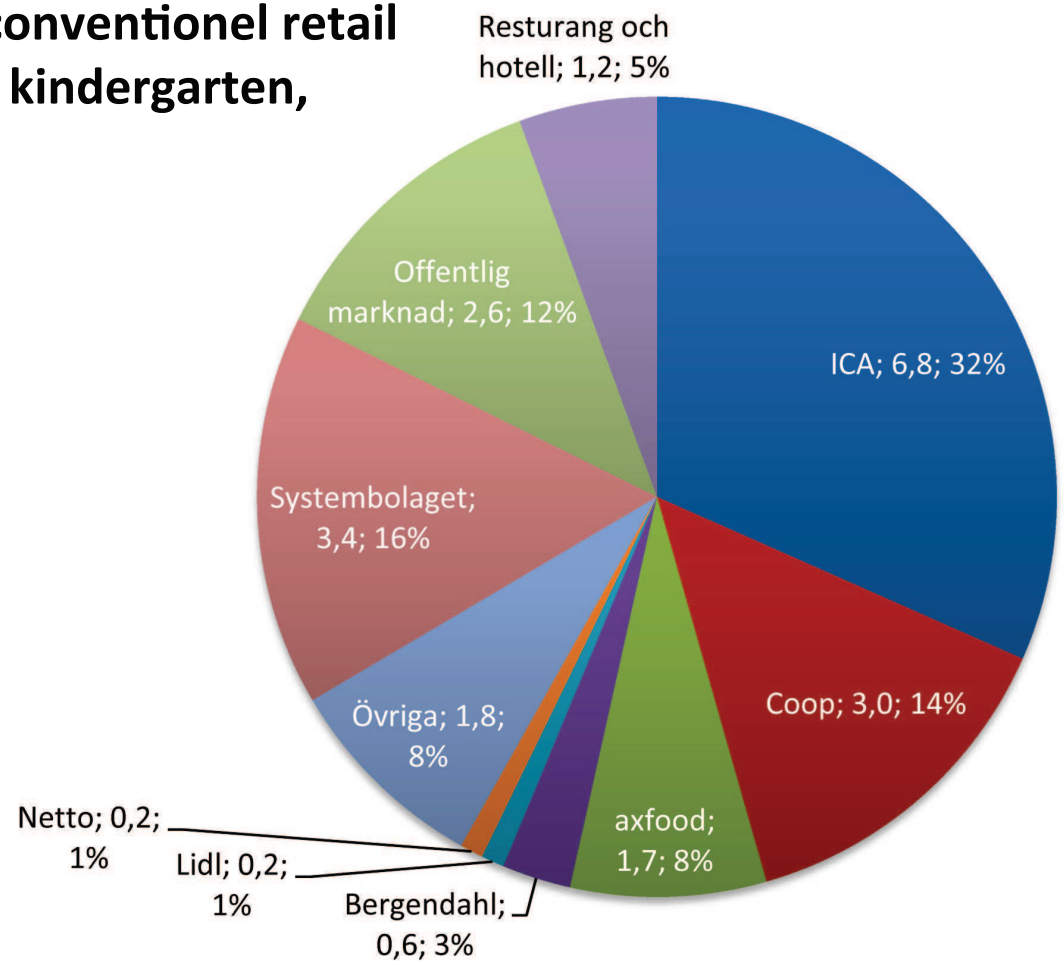
- The swedish organic marketshare 2015 is **7,8**
- Worth **2,5 bilj** Euro, + 0,8 bilj

…och så här ser det ut! Röd= totalförsäljning, blå=detaljhandel



Försäljning av ekologiska livsmedel 2015 i marknadsandelar

70% sells in conventionel retail
12% schools, kindergarten, seniorliving



Organic food baught from taxmoney

- +18% 2015
- 26 % share
- Major roleplayer as educator of the consumers of tomorrow
- 5 areas in Sweden have 100%-goa!

Organic rawmaterialmarket 2015-2016

dominated by undersupply!

- **Diary:** All diarys try to recruite new producers. Lack of organic milk all over Europé. In sweden historically high producerprices on organic milk.
- **Eggs:** The production gained 20 procent 2015, all sold. Demand is still gaining, from the whole market, but especiallay from restaurants and industry. Production will gain 5-10% 2016
- **Meat:** All slaughterhouses want more producers, production gained ca 30 % 2015
- **Pigs:** Huge undersupply, some new producers are on their way. Lowest price secured tom 202o: ca 4 Euros/kg undersupply ca 100 000 organic pigs
- **Chicken:** Produktion gain ca 130% 2016, still only 0,5% of the total chickenmarket
- **Grain:** Undersupply of rawmaterial to the mills and consumermarket, oversupply on grain whith lower quality,. Price is going up
- **Fruit and vegetables:** great demand and undersupply, especialy on swedishproduced,

The swedish organic import

half the volume is import

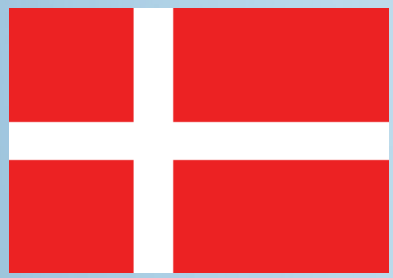
- but almost nothing of what can be produced in Sweden

Ca 30% of the growt 2015 come from swedish production

- **Chicken & Meat:** more than 95% swedish
- **Eggs:** All the volume swedish
- **Diary:** majority swedish
- **Grain:** Sweden import and export
- **Fruit & Vegetables:** big share import, swedish production gained 20 % 2015

Prediction 2016

- Market will gain 20%
- Marketshare 9,4%
- Still big potential!
- Supply of rawmaterial holds developpement back



The danes….

- Spend most on organic 2015

But……

Sweden will pass Denmark 2016 !

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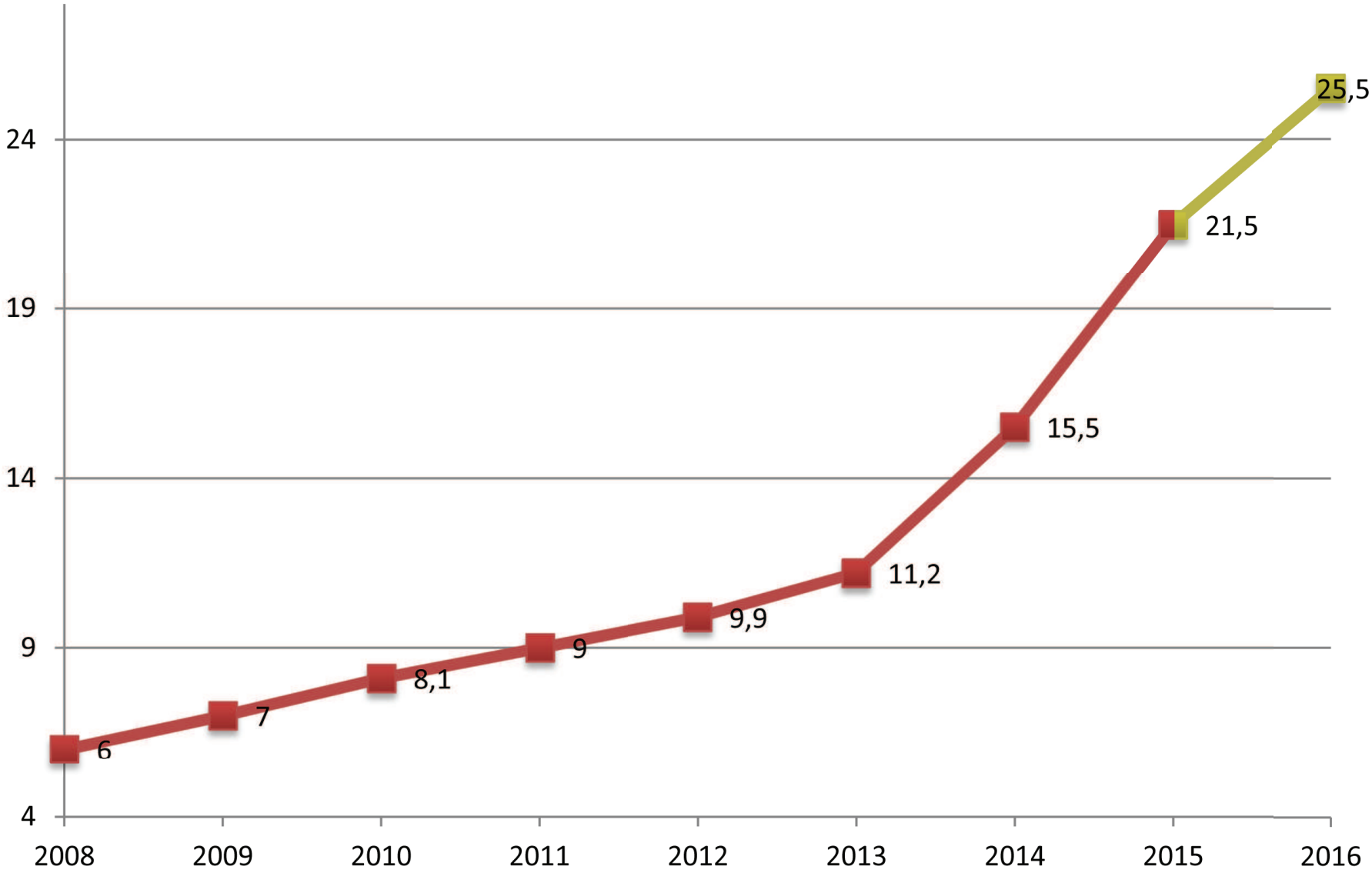
Försäljningsutveckling ekologiska livsmedel i miljarder kronor i Sverige



Prediction 2025

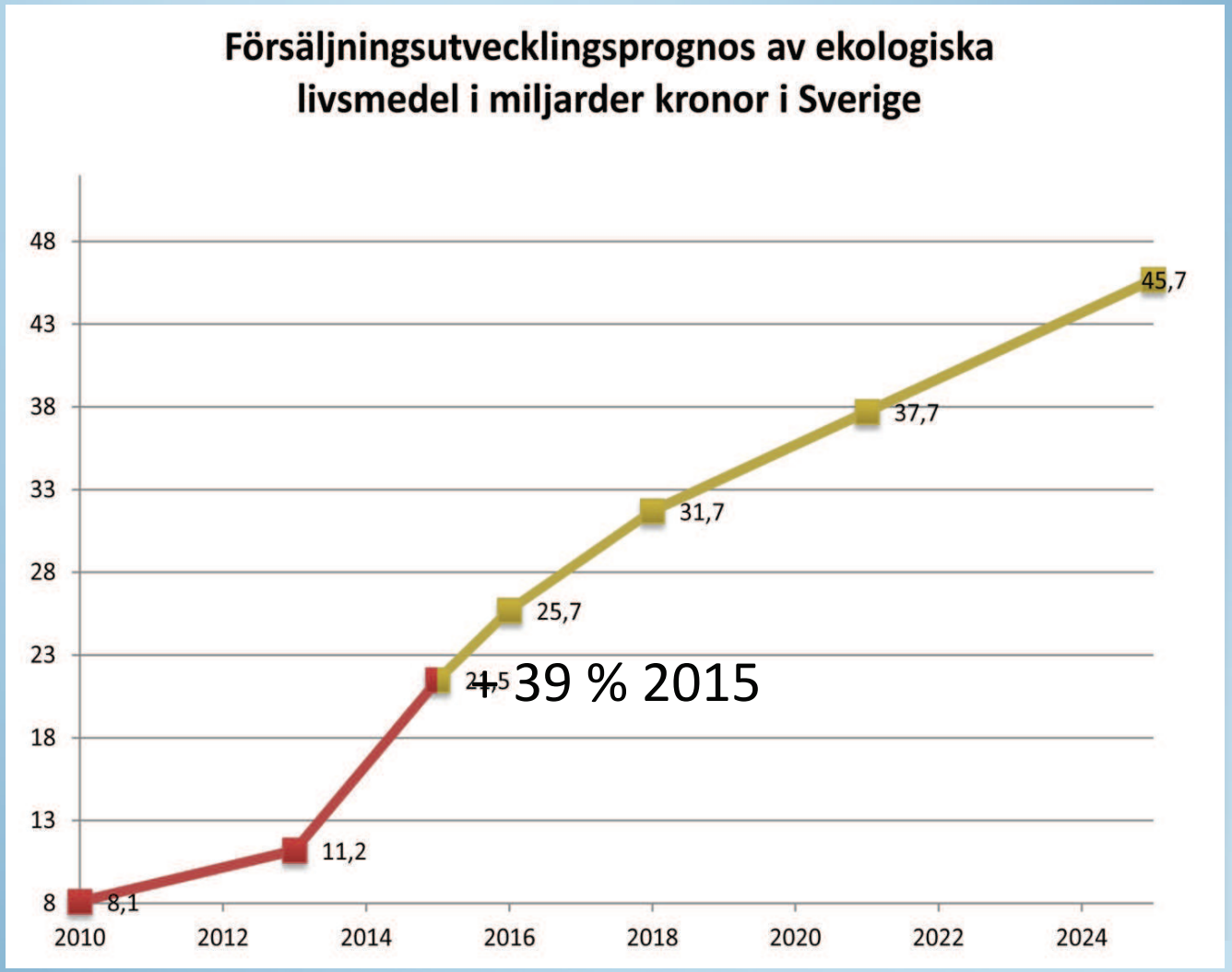
- **Market will doubble in 10 years**
- Organic marketshare: **15% (14%)**

The biggest threat:

Cheeting whith the regulation, ”Greening”

- We have to make sure the organic valu is guarded whitout any exception!
- Cheeters in organic must be hunted down and hard punished!

Försäljningsutvecklingsprognos av ekologiska livsmedel i miljarder kronor i Sverige



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Organic Farming i Sweden

Organic landshare 20% 2016?

The Organic grainfarms and dairyfarms ar bigger
They earn more money

Good value in organic farming

* KRAV-kontrakt på ägg, mjölk, kyckling, gris och grönsaker är värdefulla idag och i framtiden, såsom sockerbetskontrakt varit tidigare

* More than half of the profit in the swedish total farming comes from the organic farms – who only has 17 % of the land

CRAZY
FARMER

The organic farmer

- Younger
- More educated
- More woman
- Have more land
- Have more cows
- Invest more in the farm and the land

Sverker is the best farmer in Sweden!
- My goal is 90 % of the harvest I would get if I were conventional

Trends in organic farming

* From just grain to animals: Chickens, hens, cattle
* A lot of really big estates in sothern Sweden ar converting, they are trendsetters
* The organic farmers want more land. Pays between 100-500 euro more for rent of organic land

Organic producers earn
+ 150 – 200 euro more per hektar

Problems

* Very few good advaisors
* Hard attitud against organic farmers
* No political guidence

Special machinery developed in Sweden for organic farming

* System Cameleon
* Comb Cut

Welcome to Sweden

* 21 of june in Töreboda
* International Organic Field Day: Soil healt, Cover Crops mm
* For farmers and advisors

For more information: olle@agroide.se

Thanks!

www.ekoweb.nu

cecilia@agroide.se