



A glimpse on organic markets in Eastern Europe

Biofach 2012

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Organic markets in Eastern Europe

CEE

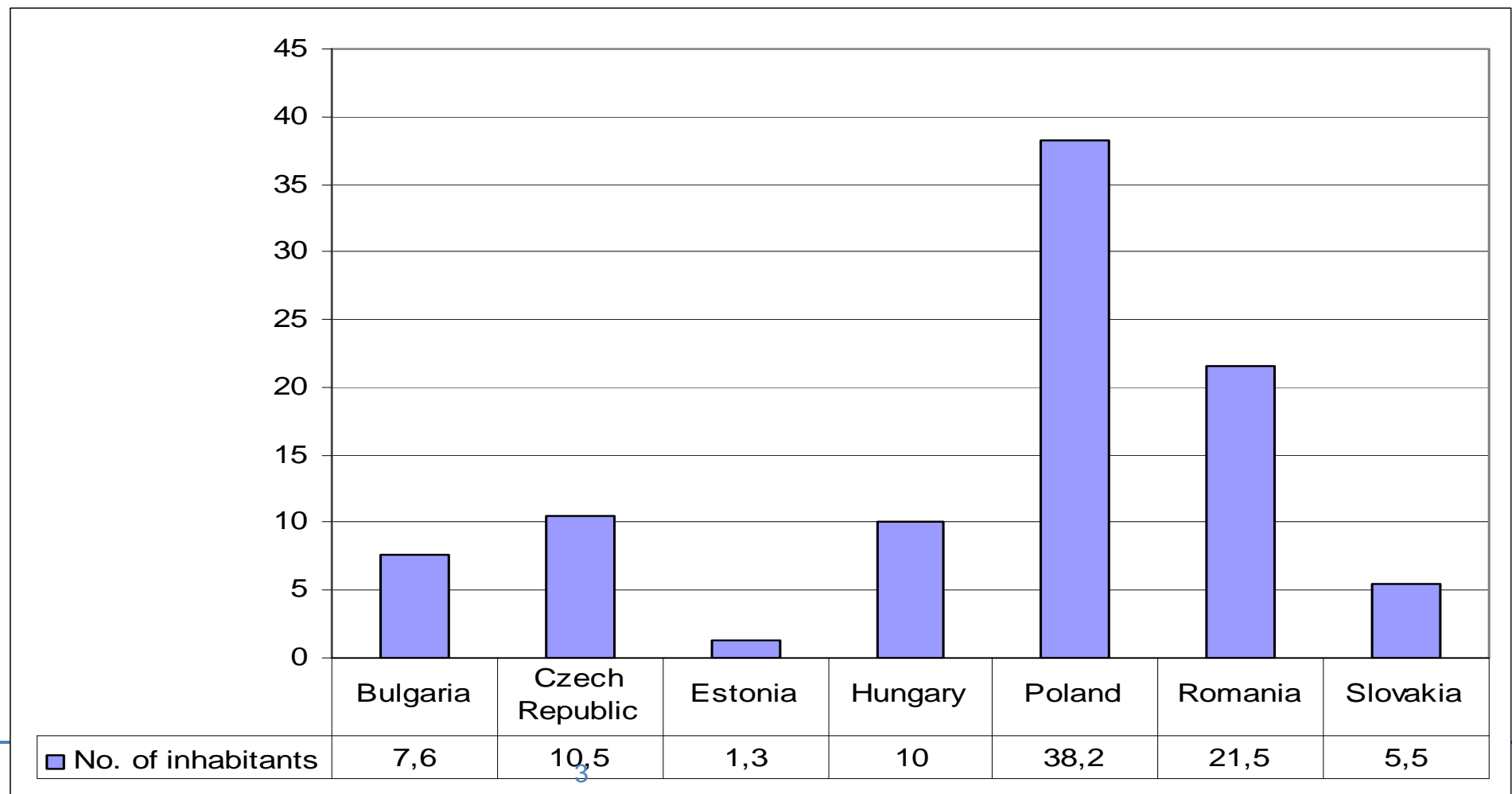
**Bulgaria
Czech Republic
Estonia
Hungary
Poland
Romania
Slovakia**



Key figures CEE

Total population: 95 million

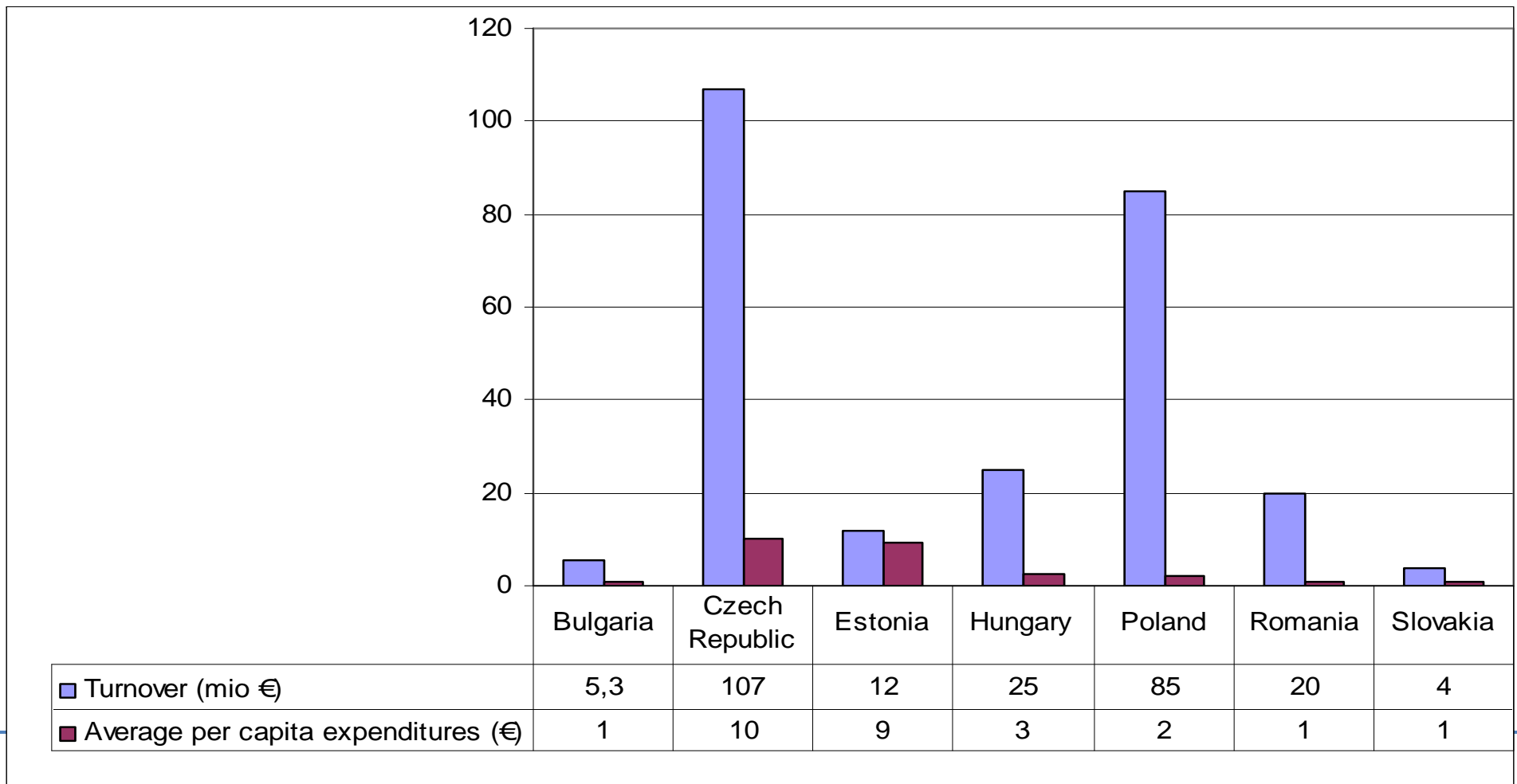
Estimated organic market size: 260 million €



Key figures CEE

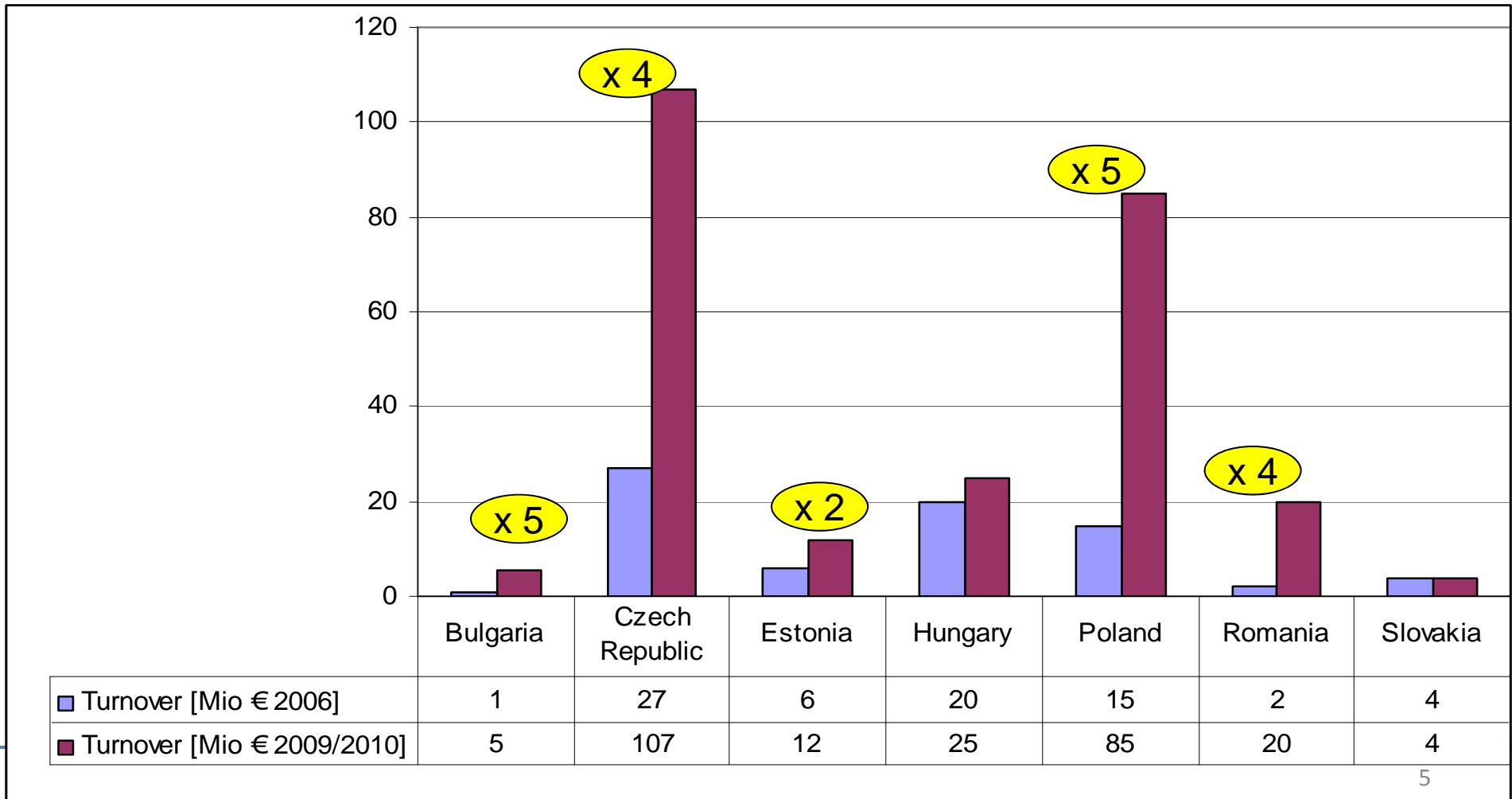
Important variations of market size and per capita consumption

Market share is beneath the 1% - mark



Key figures CEE

Market development in 3 (or 4 years) – different speed



Market characteristics CEE

Markets and best performer changed during the last years:

- Czech Republic most advanced market
- Baltics and Poland show strong growth including own processing
- Bulgaria, Ukraine, Romania, Turkey, Russia are awaking giants who begun to develop local markets and show strong growth on low levels
- Hungary lost its dynamic and grows slower

In all countries intensive work on developing local markets

“Only export oriented” is history!

With own central market place: the Organic Marketing Forum Warsaw



Market drivers:

market actors who see the ecological and economical advantages of organic without ideoligy problems

Market trends:

continuing of growth after lessons have been learned

Organic markets in Eastern Europe

SEE- Western Balkan Countries

Croatia

Serbia

Slovenia

Macedonia (FYRM)

Bosnia and Herzegovina (BiH)

Montenegro



FOCUS - BALKANS

RAOM by Ecozept

Rapid Assessment of Organic Markets

Internet survey among 80 experts

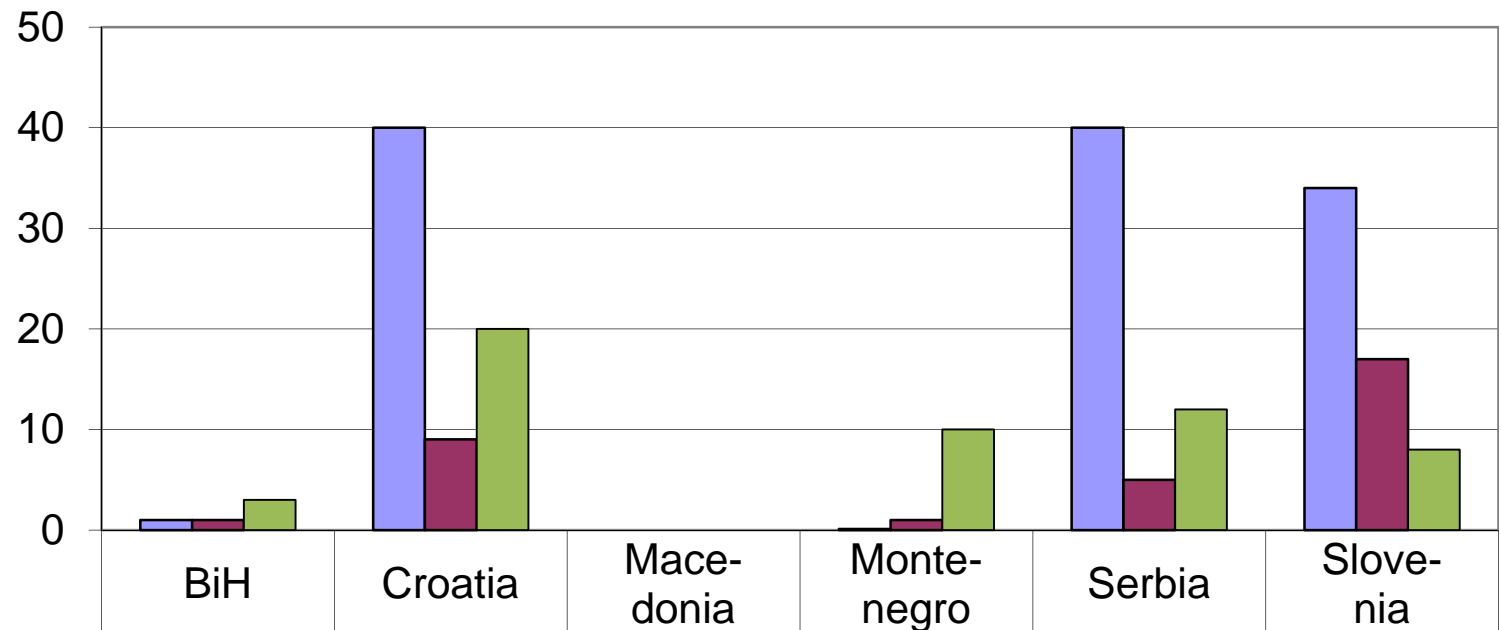
Developed & run in February 2012

Key figures SEE

Total population: 20 million

Average expenditures for organic food: from 1 to 17 € capita

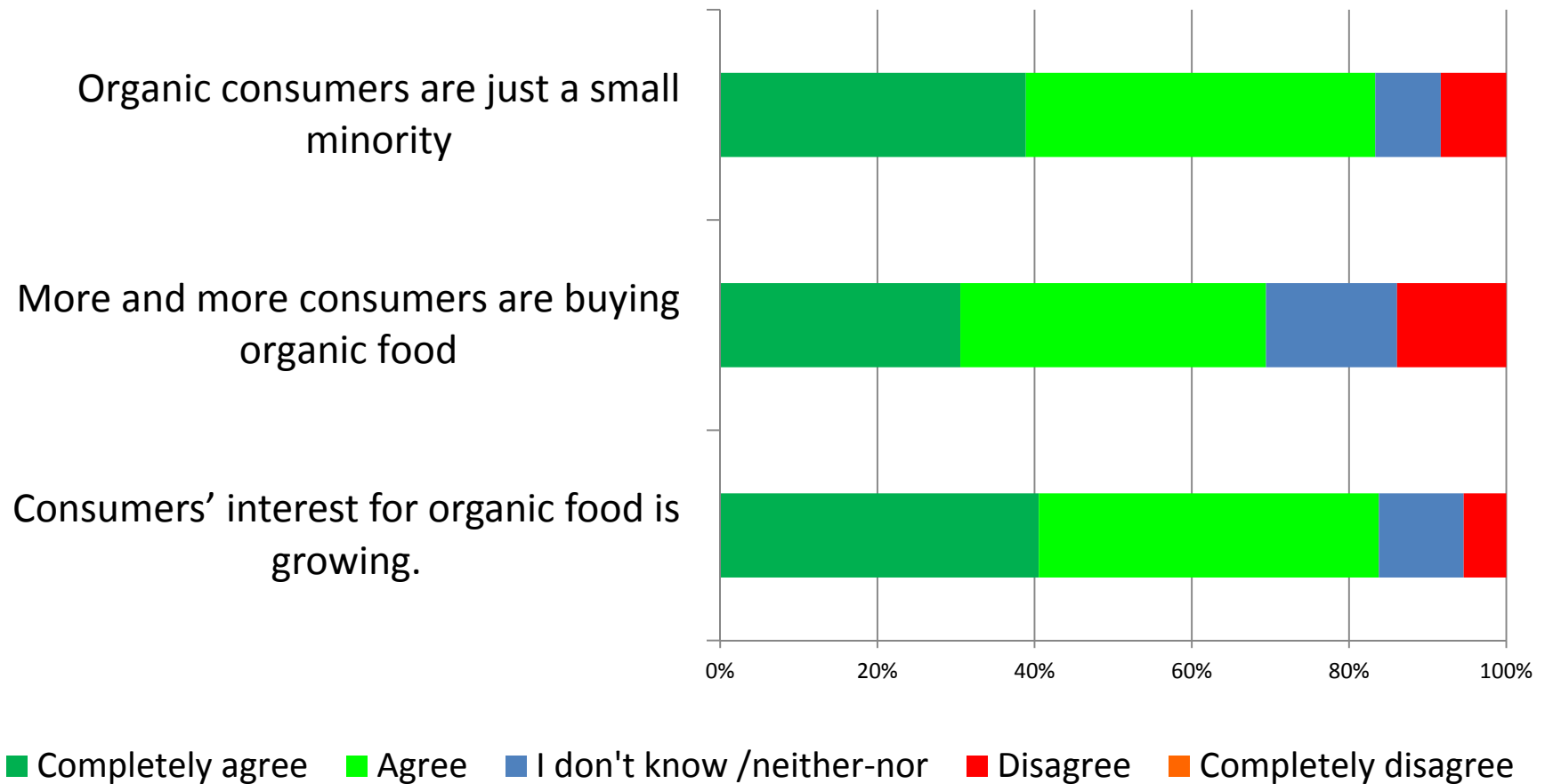
Estimated organic market size: 120 million €



■ Turnover 2010 (mio €)	1	40		0.1	40	34
■ Average per capita expenditures (€)	1	9		1	5	17
■ Market growth 2010/2009	3	20		10	12	8

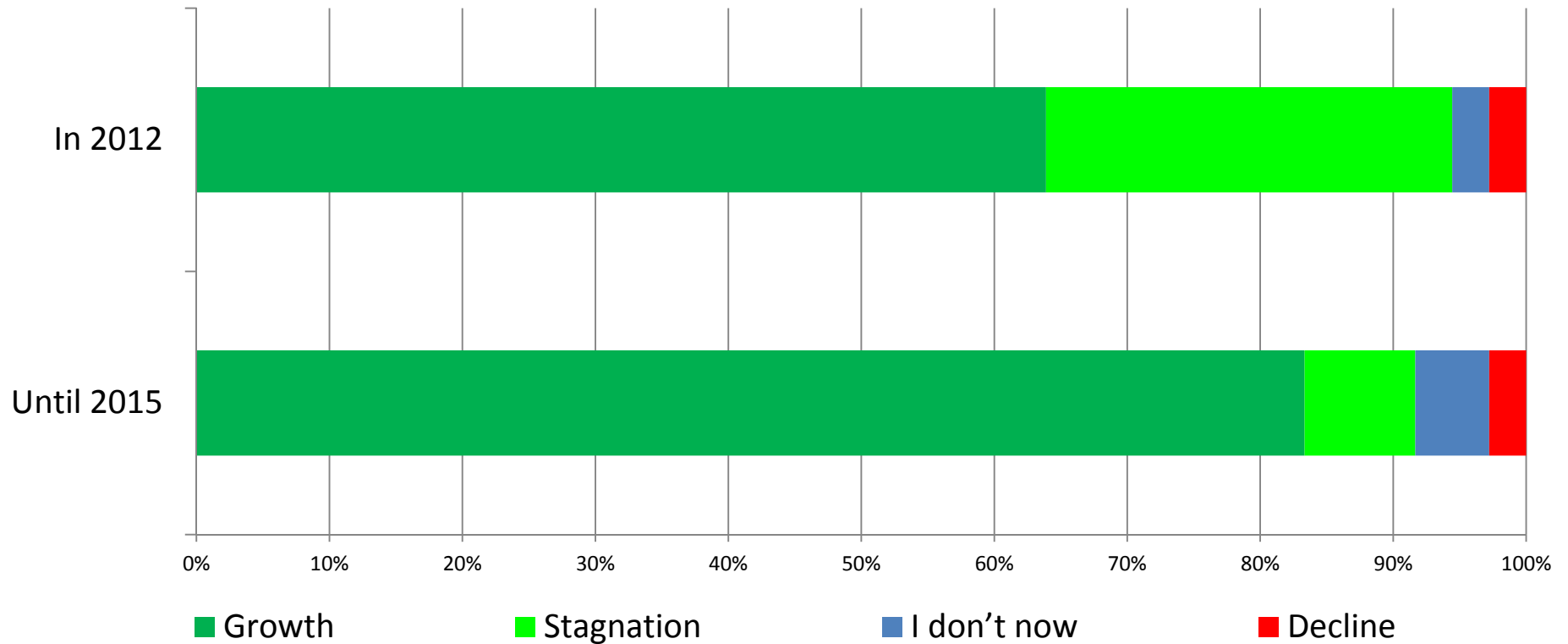
Perspectives SEE

About consumers:



Perspectives SEE

What do you expect for the development of the organic food market in your country?



Facts & challenges in SEE

Production is much higher than consumption

Nonetheless domestic processing is lacking raw material

Imports of processed items discourage local projects

Motivate & train farmers

Enhance supply chain structuring: efficiency

Mobilize synergies in processing & retailing: scale effects

Inform & motivate consumers

Consolidate public policies

Clarify labeling

THANK YOU!



Sources:

Focus Balkans: www.focus-balkans.org

Tom Vaclavik (Greenmarketing, CZ):
www.greenmarketing.cz

FiBL : www.fibl.org

**80 experts through RAOM –
Rapid Assessment of Organic Markets
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EkoConnect 14 CEE country study: www.ekoconnect.org and
presentations at www.Organic-Marketing-Forum.org, Warsaw