



# Organic Trade Association: First Step Market Tracker Service

A custom report compiled by Euromonitor International for OTA

Organic Trade Association  
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## WESTERN EUROPE\*

\* Andorra, Austria, Belgium, Cyprus, Denmark, Finland, France, Germany, Gibraltar, Greece, Iceland, Ireland, Italy, Liechtenstein, Luxembourg, Malta, Monaco, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, Turkey and the UK.

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# 1. QUALITATIVE ANALYSIS

## 1.1 QUICK FACTS

- The Organic Packaged Food and Beverages category in Western Europe registered value growth of 4.4% in 2023 at current prices, to record a market size of US\$22.0 billion.
- Over the 2019-2023 review period, the Organic Packaged Food category registered a CAGR of 7.9% at current prices. However, over the forecast period (2023-2028), growth is predicted to slow significantly, with a projected CAGR of just 0.4% at constant prices.
- Organic Beverages grew at 5.8% current terms CAGR between 2019 and 2023, while growth over the forecast period is predicted to decelerate to a 0.7% constant terms CAGR.
- Growth in Organic Packaged Food over the review period was driven primarily by Organic Staple Food, which recorded a 9.4% current terms CAGR during the review period. However, it is expected to decline by an annual average of 1.5% in constant terms over the forecast period.
- Within Organic Beverages, Organic Hot Drinks led historic growth, with a CAGR of 7.4% in current terms. It is projected to continue to see the fastest growth between 2023-2028, with a CAGR of 1.1% in constant terms.

## 1.2 MARKET TRENDS

- Growing consumer concern over the potential health risks of pesticides and chemical additives commonly used in packaged food production has driven strong demand for organic products across Europe. In response, brands have ramped up new product launches and marketing efforts, and have expanded distribution networks.
- Sustainability and animal welfare are also key factors boosting organic consumption across the continent. France and Germany lead this trend, with particularly strong demand in Dairy Products and Alternatives, Staple Foods, and Cooking Ingredients and Meals. Consumers increasingly choose organic options to support sustainable agriculture and reduce their environmental footprint.
- Regulatory initiatives have further contributed to growth for organic products. The EU has set a target for 25% of agricultural land to be under organic farming by 2030, up from 8.5% in 2019. This aligns with the EU's broader objective of building a sustainable food system that delivers high-quality nutrition with minimal environmental impact.

## 1.3 COMPETITIVE LANDSCAPE

- Hipp GmbH & Co Vertrieb KG led Organic Packaged Food, holding 3.4% of the market in 2023. The company offers organic baby food, from formula to weaning food. The company boasts a large majority of the Organic Dairy Products and Alternatives in Austria, where it holds alone 77.2% of the market in 2023, nonetheless their most important market by sales are Turkey and Germany.
- Private label lines hold an important part of the Organic Packaged Food category holding 4.0% of the market in 2023, being particularly important in categories like Organic Snacks and Staple Foods. For instance, in Turkey, private label sales accounted for 36.5% of the market in Organic Staple Foods.
- Ecotone leads the Organic Beverages category in 2023 with a 6.4% market share, 1.4 p.p. higher than the previous year. The French multinational company has consolidated its position in the Organic Hot Drinks market, particularly in the Netherlands, France and the UK. In Netherlands, it has consolidated its position by growing its herbal tea brand Piramide and Zonnatura within Organic Hot Drinks landscape reaching 56.7% of the market in 2023.

## 1.4 PROSPECTS AND GROWTH OPPORTUNITY

- Categories expected to see strong growth across Western Europe include Organic Plant-Based Milk and Organic Meat and Seafood Substitutes, with projected absolute increases of US\$158.0 million and US\$32.3 million, respectively, between 2023 and 2028. The corresponding constant terms CAGRs are 6.4% and 6.9%, respectively. Growth in these categories highlights the strong connection between demand for sustainable products and the rising adoption of vegetarian and flexitarian diets.
- Germany and France constitute the largest organic markets in Western Europe, with Dairy Products and Alternatives in Germany and Snacks in France predicted to see the highest absolute growth of US\$118.8 million and US\$45.7 million, respectively, over 2023-2028. One notable emerging market is Cooking Ingredients in Switzerland, where organic olive oil has seen strong growth, due to its perceived health benefits, such as a reduced risk of cardiovascular disease. This category is predicted to grow at a constant terms CAGR of 4.1% between 2023 and 2028.

## 1.5 GENERAL HEALTH AND WELLNESS TRENDS

- While sustainability continues to influence consumer choices, shoppers increasingly seek additional benefits, with health advantages being a top priority. Brands that successfully combine sustainability and health claims are better positioned to drive purchase decisions. Credibility and transparency have also become crucial, as unsubstantiated claims deter purchases amid rising regulatory pressure, like the recently adopted Green Claims Directive of the EU, which requires a product life-cycle approach to environmental claims, and concrete supporting evidence.
- The aging of populations continues to drive demand for products that support healthy aging and longevity. Consumers increasingly take a holistic view of aging, valuing both physical and mental health. In food, this translates into strong interest in products with benefits such as bone support and cognitive function. As a result, manufacturers must ensure that age-specific segmentation is clearly reflected in their market strategies.

## 1.6 GENERAL ECONOMIC AND DEMOGRAPHIC LANDSCAPE

### **Economy:**

- Western Europe's GDP is projected to grow by 1.2% in real terms in 2025. Despite uncertainty stemming from US imposed tariffs and retaliatory measures, economic growth is predicted to recover over 2025, supported by looser monetary policy, increased public spending and rising consumer demand. Between 2026 and 2028, annual real GDP growth is forecast to average 1.6%.
- Inflation in Western Europe averaged 7.1% over 2024, with significant variations across countries. Turkey was a notable outlier, with inflation standing at 58.5%. Inflation is predicted to continue moderating, driven by easing services inflation and slowing wage growth. In Western Europe, inflation is projected to reach 5.1% in 2025 and average 3.6% annually between 2026 and 2028.

### **Population demographics:**

- Western Europe's population reached 517.2 million in 2024, and is projected to grow by 0.3% to 518.6 million in 2025. With fertility rates remaining below replacement level, population growth is predicted to remain low, and driven primarily by positive net migration. Turkey is set to remain the most populous country in the region, with its population projected to reach 88.1 million by 2040.
- The median age in Western Europe was 42.4 years in 2024 – an increase of 0.8 years since 2020. Over the period to 2040, birth rates are expected to continue decreasing, while life expectancy rises to 85 years. These movements will drive the ongoing aging trend, with Western Europe

continuing to have one of the oldest median ages globally. By 2040, mid-lifers aged 45-64 years will account for a quarter of the region's population, making them a key demographic group influencing consumer trends.

**Income and expenditure:**

- The savings ratio in Western Europe stood at 10.9% of disposable income in 2024, one of the highest savings ratios in the last decade, excluding the pandemic period. As interest rates decrease, saving rates are expected to decrease steadily over the forecast period.
- Consumer expenditure per capita grew by 5.4% in 2024, in current US dollar terms. In constant US dollar terms, it is projected to grow at an average annual rate of 1.3% over the period to 2028.
- Disposable income per capita in Western Europe reached US\$26,410 in 2024, though disparities remain significant, ranging from US\$57,951 in Switzerland to just US\$10,050 in Turkey. Looking ahead, disposable income in the region is forecast to grow at an average annual rate of 1.3% over the period to 2028, making it the slowest growing region worldwide in terms of income. This is partly attributable to weaker productivity gains in high-income economies.

All figures in this report reflect fixed exchange rates across both historic and forecast data. Market data are based on 2023 exchange rates, while economic data use 2024 exchange rates.

## 1.7 ORGANIC PACKAGED FOOD AND BEVERAGE DATA

Data type	Unit	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	CAGR (19-23 )	CAGR (23-28 )
Health and wellness products consumption <sup>1</sup>	USD million	154,301.5	168,815.2	176,300.3	192,724.3	206,690.5	210,689.6	215,427.1	220,449.2	225,407.6	230,394.8	7.6%	2.2%
Organic packaged food and beverages consumption	USD million	16,456.6	18,673.7	19,612.2	21,053.1	21,987.1	21,879.5	21,986.9	22,155.6	22,311.6	22,506.4	7.5%	0.5%
Organic packaged food consumption	USD million	13,668.8	15,538.2	16,332.6	17,586.9	18,499.9	18,406.7	18,489.0	18,627.8	18,747.4	18,891.7	7.9%	0.4%
Organic beverages consumption	USD million	2,787.8	3,135.5	3,279.6	3,466.2	3,487.2	3,472.8	3,497.9	3,527.8	3,564.2	3,614.7	5.8%	0.7%
Organic packaged food and beverages consumption as a % of total health and wellness products consumption	%	10.7	11.1	11.1	10.9	10.6	10.4	10.2	10.1	9.9	9.8	-	-

## 1.8 ECONOMIC AND DEMOGRAPHIC DATA<sup>2</sup>

Data type	Unit	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Total population	million	504.9	507.3	508.2	510.5	514.8	517.2	518.6	519.0	519.8	520.5
% of population in social class A, B or C (income above national average)	%	37.7	37.6	37.5	37.4	37.3	37.3	37.3	37.2	37.2	37.1
% Population aged 65+	%	18.4	18.7	18.9	19.1	19.3	19.6	19.9	20.3	20.7	21.1
% Population aged 0-14	%	16.8	16.6	16.5	16.4	16.2	15.9	15.7	15.4	15.2	14.9
% Population with higher education degrees	%	24.4	24.7	24.9	25.1	25.3	25.4	25.6	25.7	25.8	25.8
Average number of children per household	children	0.5	0.5	0.5	0.5	0.5	0.5	0.4	0.4	0.4	0.4
GDP per capita <sup>3</sup>	USD per capita	35,232.2	33,611.6	36,623.0	40,310.9	42,847.4	45,254.2	45,674.4	46,355.7	47,044.9	47,735.8
Consumer expenditure per capita (USD)	USD per capita	18,792.2	17,188.9	18,510.3	20,986.7	22,574.9	23,799.3	24,032.1	24,379.9	24,695.9	25,047.5

<sup>1</sup> Health and Wellness Definition: Health and wellness is the aggregation of organic packaged food and beverages, fortified/functional packaged food and beverages, naturally healthy packaged food and beverages, better for you packaged food and beverages and food intolerance products.

The above definition and more can be referenced from the [definitions](#) table at the end of the report.

<sup>2</sup> Economic and Demographic Data have been updated to reflect final 2024 estimates, and therefore use 2024 as the base year for exchange rates and prices.

<sup>3</sup> Historic current prices and forecast constant 2024 prices.

Consumer expenditure per capita on food and non-alcoholic beverages (USD) <sup>3</sup>	USD per capita	2,126.5	2,240.2	2,289.2	2,486.1	2,745.8	2,957.3	2,975.7	3,003.3	3,029.7	3,062.6
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## 1.9 RETAILER AND CITY DATA

### 1.9.1 TOP 5 CITIES BY POPULATION

Data category	Rank	City/retailer	Population (million)
Top cities by population (2024)	1	Istanbul, Turkey	15.9
Top cities by population (2024)	2	London, UK	12.9
Top cities by population (2024)	3	Paris, France	12.0
Top cities by population (2024)	4	Madrid, Spain	7.2
Top cities by population (2024)	5	Ankara, Turkey	5.8

### 1.9.2 TOP 5 GROCERY RETAILERS BY SALES

Data category	Rank	City/retailer
Top grocery retailers by sales (2024)	1	Schwarz Beteiligungs GmbH
Top grocery retailers by sales (2024)	2	Aldi Group
Top grocery retailers by sales (2024)	3	Edeka Zentrale AG & Co KG
Top grocery retailers by sales (2024)	4	Rewe Group
Top grocery retailers by sales (2024)	5	Tesco Plc



## 1.10 UNITED STATES DEPARTMENT OF AGRICULTURE GLOBAL AGRICULTURAL TRADE SYSTEM DATA

### 1.10.1 TOP 5 EXPORT COMMODITIES TO WESTERN EUROPE

Year	Country	Rank of Product/Commodity	Product/Commodity	Export Value (USD)
2024	Western Europe	1	Organic Vinegar and Substitutes	3,952,799
2024	Western Europe	2	Organic Dates Fr/Dr	3,434,294
2024	Western Europe	3	Organic Coffee Roast Not Decaf	1,376,825
2024	Western Europe	4	Organic Apples Fresh	1,215,849
2024	Western Europe	5	Organic Asparagus Fr/Ch	837,890
<b>2024</b>	<b>Western Europe</b>	<b>Total</b>	<b>Total Organics*</b>	<b>296,109,663</b>
2023	Western Europe	1	Organic Dates Fr/Dr	2,877,011
2023	Western Europe	2	Organic Vinegar and Substitutes	2,834,162
2023	Western Europe	3	Organic Cherries Fresh	2,592,161
2023	Western Europe	4	Organic Coffee Roast Not Decaf	1,458,102
2023	Western Europe	5	Organic Asparagus Fr/Ch	909,065
<b>2023</b>	<b>Western Europe</b>	<b>Total</b>	<b>Total Organics*</b>	<b>233,960,557</b>
2022	Western Europe	1	Organic Vinegar and Substitutes	2,728,127
2022	Western Europe	2	Organic Coffee Roast Not Decaf	1,871,858
2022	Western Europe	3	Organic Asparagus Fr/Ch	775,831
2022	Western Europe	4	Organic Apples Fresh	694,987
2022	Western Europe	5	Organic Lettuce Not Head Fr/Ch	453,877
<b>2022</b>	<b>Western Europe</b>	<b>Total</b>	<b>Total Organics*</b>	<b>199,459,350</b>
2021	Western Europe	1	Organic Vinegar and Substitutes	3,218,587
2021	Western Europe	2	Organic Coffee Roast Not Decaf	1,148,282
2021	Western Europe	3	Organic Apples Fresh	1,119,791
2021	Western Europe	4	Organic Peas Fr/Ch	839,621
2021	Western Europe	5	Organic Asparagus Fr/Ch	693,763

2021	Western Europe	Total	Total Organics*	200,430,567
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*Note: Total organics is the sum of all exports in a particular year*

## 2. STATIC IMAGES

### 2.1 ORGANICS DASHBOARD FROM PASSPORT

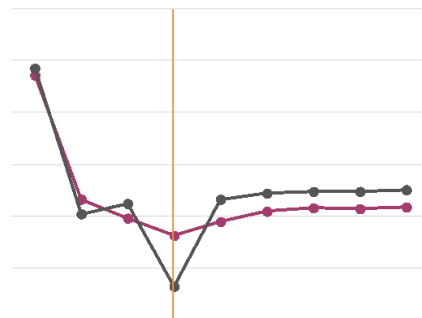
#### 2.1.1 COUNTRY GENERAL OVERVIEW

##### Organic Western Europe

###### Quick Stats

Geography's actual rank vs other geographies

Western Europe	World
<b>Market Size</b>	
<b>21,987.1</b>	<b>62,139.4</b>
2023, USD million	2023, USD million
<b>Per Capita</b>	
<b>42.6</b>	<b>7.7</b>
2023, USD	2023, USD
<b>Forecast Growth</b>	
<b>0.5%</b>	<b>2.2%</b>
CAGR 2023-2028 Constant, Fixed 2023 USD	CAGR 2023-2028 Constant, Fixed 2023 USD



###### Top 3 Companies

Retail Value RSP, % breakdown

Ecotone	3.4
Hipp GmbH & Co Vertrieb KG	2.9
Alnatura Produktions- & Handels GmbH	2.1
Others	91.6

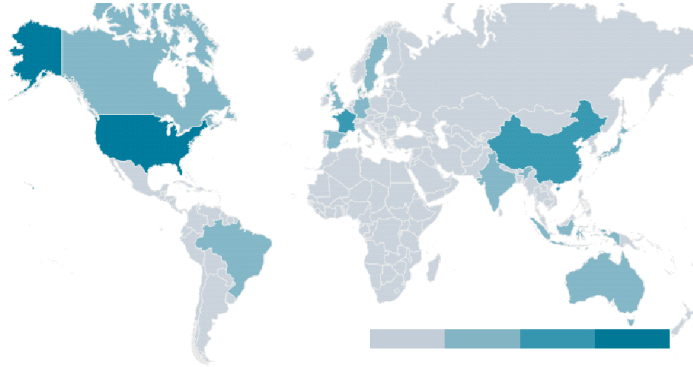
- Ecotone leads the organic segment in Western Europe with a value share of 3.4% in 2023, followed by Hipp GmbH & Co Vertrieb KG with a value share of 2.9% and Alnatura Produkitons with a share of 2.1%.
- Western Europe is the largest regional market for Organic worldwide, exceeding its closest competitor in market size by 25.4%. It also possesses one of the highest penetration rates of organic food, with 10.6% of all Health and Wellness products being organic.

## 2.1.2 MAP OVERVIEW

### World Organic

#### Market Size

Retail Value RSP, 2023, USD million, 2023 Ex. Rate



#### Global Figure

**62,139.4**

2023, USD million

#### Regional Comparison

2023, USD million



- Organic products in Western Europe represent roughly 35.4% of global demand, despite having only 6.4% of the global population, making it a highly valuable market. The region is home to four of the world's 10 largest organic markets, with France leading, at US\$6,577.7 million in 2023. It also has the highest ranked country in terms of per capita consumption, Denmark, where the average consumer spent US\$283.4 on organic products in that year.
- The Western European market for organic products is projected to increase in value at a CAGR of 0.5% over the forecast period 2023-2028, at 2023 constant prices and fixed US dollar exchange rates, reaching a value of US\$22,506.4 million by 2028.

### 3. DEFINITIONS

Term	Definition
Health and wellness	Health and wellness is the aggregation of organic packaged food and beverages, fortified/functional packaged food and beverages, naturally healthy packaged food and beverages, better for you packaged food and beverages, and food intolerance products.
Organic packaged foods and beverages	<p>This category includes packaged food and beverages that are certified organic by an approved certification body. Organic production is based on:</p> <ul style="list-style-type: none"> <li>• A system of farming that maintains and replenishes soil fertility without the use of toxic and persistent pesticides and fertilizers.</li> <li>• Organic food and beverages are minimally processed, without artificial ingredients, preservatives or irradiation.</li> <li>• The use of GMOs (Genetically Modified Organisms) is prohibited. "Certified Organic" means the item has been grown according to strict uniform standards that are verified by independent state or private organizations.</li> <li>• Depending on the country, such products are called "organic", "biological" or "ecological". For organic products to be included under Euromonitor definitions, the organic aspect needs to form part of the positioning/marketing of the product. Organic packaged foods and beverages is the aggregation of organic baby food, bakery, confectionery, dairy, ice cream, oils and fats, ready meals, rice, sauces, dressings and condiments, snack bars, soups, spreads, sweet and savory snacks and other organic food.</li> </ul> <p>Note that fresh food products or individual ingredients are not included in this <a href="#">definition</a>.</p>
Compound annual growth rate (CAGR)	The compound annual growth rate (CAGR) is the average annual growth rate over a specified period of time. For example, the CAGR of consumption from 2019 to 2023 represents the average annual growth rate over those four years.
USDA GATS data clarification	The data presented in table 1.10.1 represents the dollar values of the top five organic commodities, as well as of the total organic exports of the trade partner for the period 2021-2024 as per the United States Department of Agriculture's Global Agricultural Trade System, a database consisting of international agricultural, fish, forest and textile products trade statistics dating from the inception of the Harmonized coding system in 1989 to the present.