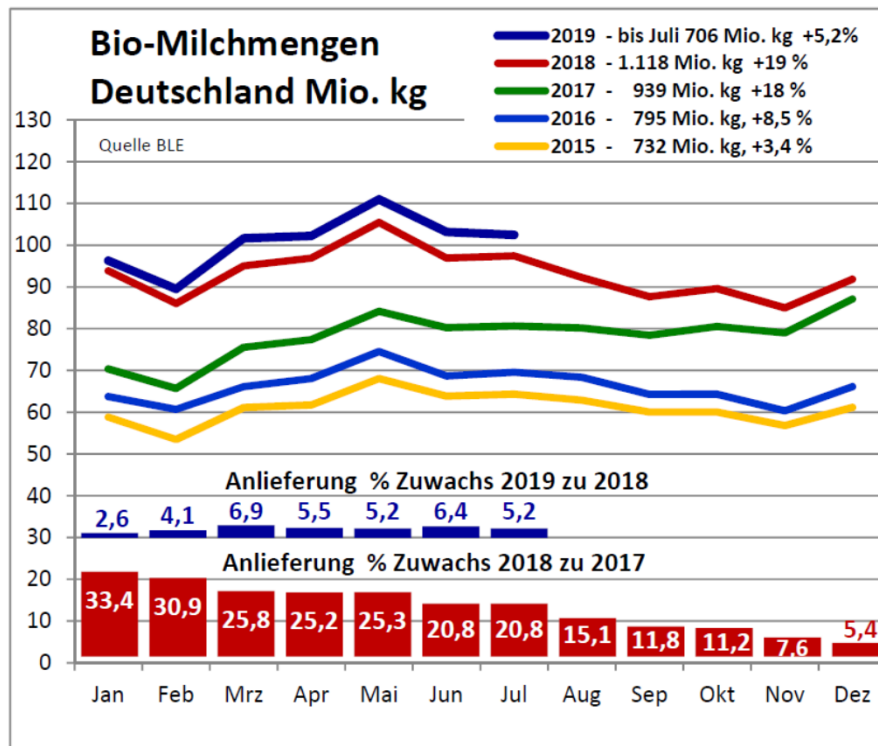


NEOMP Meeting
Leuven 09./08. Oct. 2019

Organic milk delivery

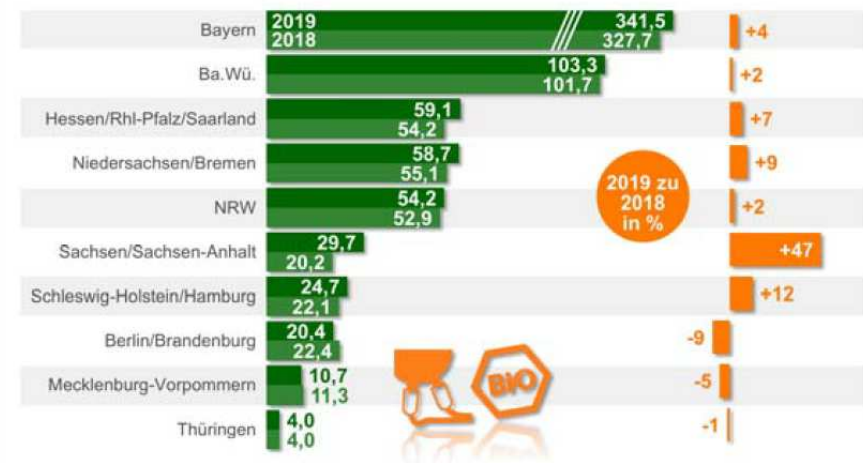
Bioland



Süden und NRW zeigen kleines Mengenplus

AMI

Anlieferung von Bio-Kuhmilch in Deutschland in Mio. kg nach Bundesländern und Veränderungsrate in %, Jan bis Juli 19 zu Jan bis Juli 18



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Quelle: BLE

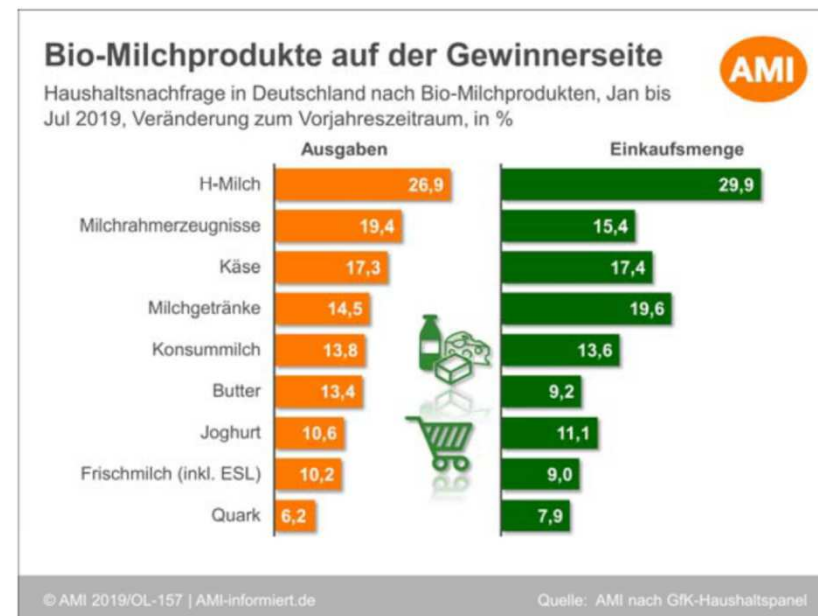
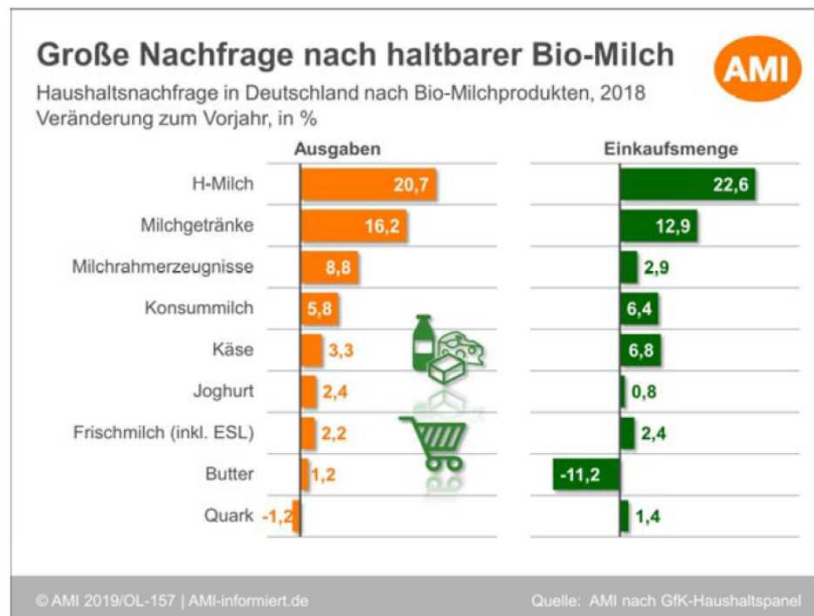


Demand organic milk products

Bioland

2018 versus 2017

2019 versus 2018



BUT: production growth in Germany is not as big, because of competition from neighbouring countries

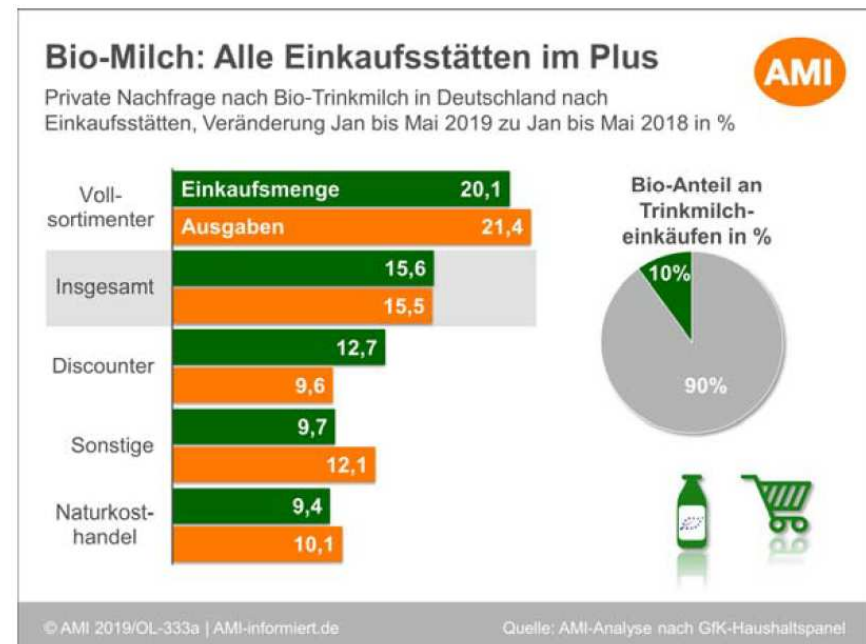
Organic drinking milk: growth in supermarkets, discounter and natural health stores



2018 versus 2017

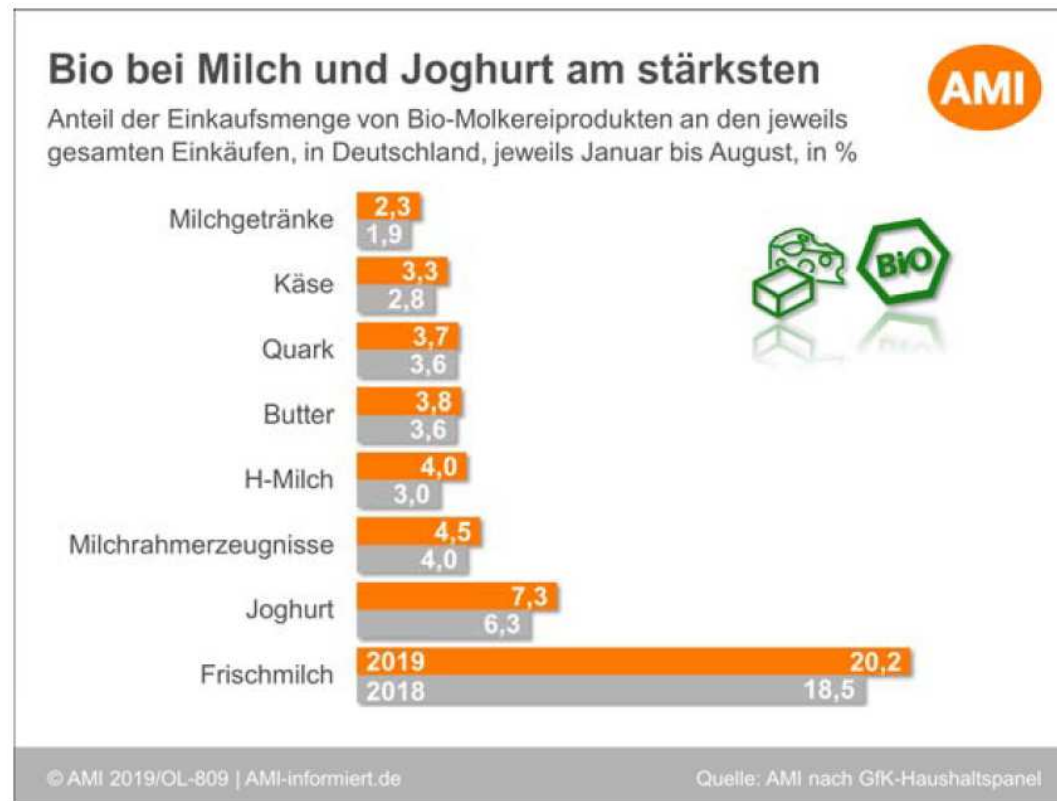


2019 versus 2018



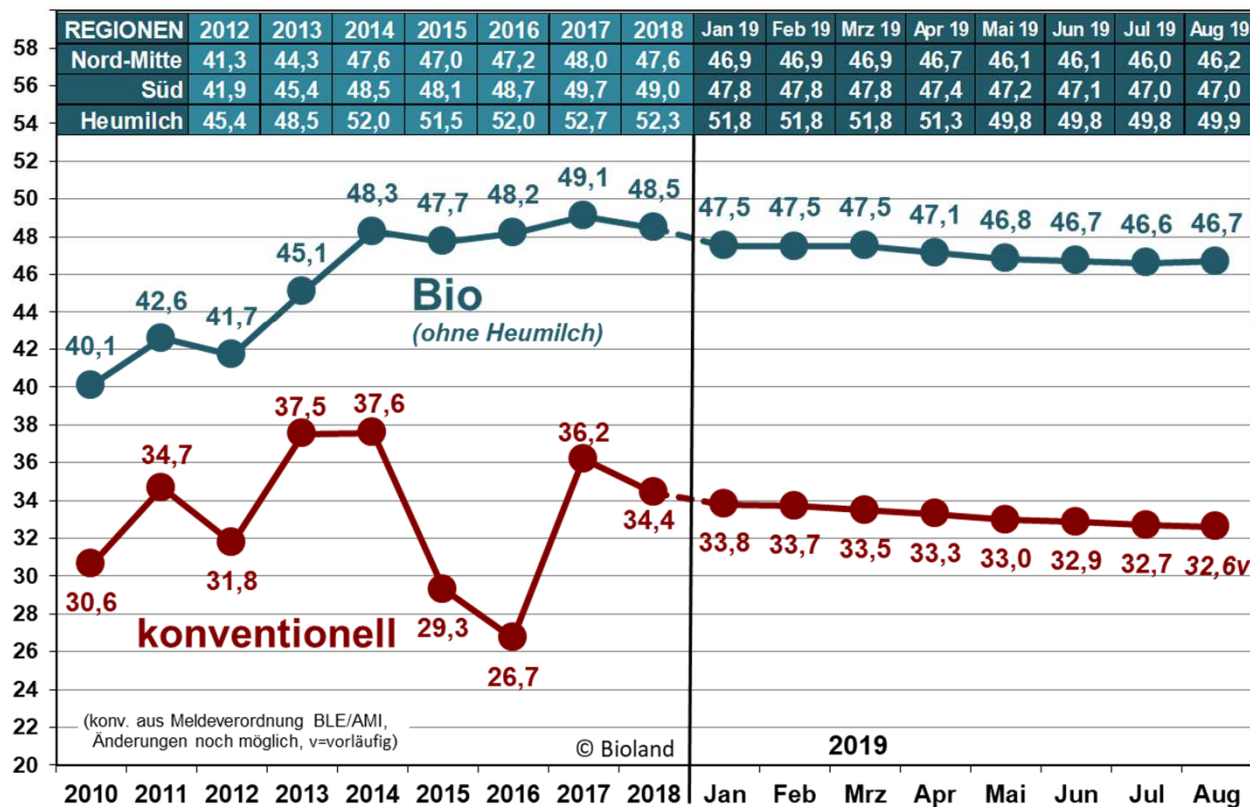
Share organic milk products

Bioland



Ø Milchpreise Deutschland

Cent/kg netto ab Hof bei 4,0% Fett und 3,4% Eiweiß, incl. Zu- und Abschläge,
Jahre mit / Monate ohne Nachzahlungen,
Durchschnittspreise mengengewichtet und nach Molkereistandort.



Summary 2019



- Lidl has started with a range of BIOLAND Products
- Followed by a bigger growth on organic products in every kind of shops as well in natural food stores
- Aldi answered with more advertisement für organic products as well, but only on EU-level and put some pressure on prices in spring
- Natural food scene talks about effects of „Greta“ and the climate discussion
- Drinking milk with a plus as: „pasture milk“ and „hay milk“, „animal welfare“
- Quality requirements in discussion:
 - *Pasture (some dairies pay extra plus)*
 - *Suckling of calves in herds*
 - *No more share of conv. biogas substratum, conv. straw bedding, ...*