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ECOLOGICAL RECYCLED PAPER

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INDEPENDENT FREE NEWSPAPER ABOUT THE ORGANIC SECTOR

TRADE
EDITION
2020

"It angers me when sustainability gets used as a buzz word. For 90 percent of the world, sustainability is a matter of survival" CAMERON SINCLAIR

2020: the decade that will transform organic into a mass phenomenon



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2020

ORGANIC KEY
DECISION-MAKERS
MEET AT

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into organic
VIVANESS
into natural beauty

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The Future of Health
at Europe's favourite
natural business event

**organic
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Madrid, Spain
3-4 June 2020

24-25 June
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The Netherlands
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Functional Ingredients

sana

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Products

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organic
foodFAIR**
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12-15 February
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BIOFACH and BIOFACH World: 360° perspective on the organic sector – around the globe and all year round

From 12 – 15 February, the international organic food and natural cosmetics sectors gather in Nuremberg for BIOFACH and VIVANESS 2020. New products, trends and innovations from all over the world will be presented by the industry in two extra halls. The next round of BIOFACH is set to welcome 3,500 exhibitors, while the number of companies participating in VIVANESS has increased to around 300, ensuring an even wider range of products on display for the well over 50,000 trade visitors expected to the combined exhibition. Dr Jane Goodall, primate researcher and environmental activist will hold the keynote address at the opening of the combined trade fairs. The international organic sector can already mark the dates for the 2021 event: 17 – 20 February.

BIOFACH, Nuremberg: four days and one “place to be” for the international organic sector

BIOFACH, which celebrated its 30th anniversary in 2019, provides an all-encompassing overview of the organic sector partly thanks to its congress, the largest and most comprehensive of its kind in the world. In 2020, the congress theme “Organic delivers!” puts the spotlight on the positive effects of doing business in an environmentally friendly way. Every year the BIOFACH Congress

welcomes more than 8,000 participants to about 150 separate presentations in its forums.

In the thematic focus area Innovations & Trends includes the Novelty Stand with the Best New Product Awards and the “Innovation made in Germany” pavilion for innovative young companies. Experience & Discover invites visitors to explore the worlds of OLIVE OIL, WINE and VEGAN and enjoys the presentations of the MUNDUS VINI BIOFACH and Olive Oil Award.

Alongside the congress and existing networking hubs Generation Future and Initiatives & NGOs, the Knowledge & Learning thematic focus area in 2020 also includes the new special show “Water: is the basis of all life endangering?”

Year after year, BIOFACH as a whole is synonymous with an unrivalled range of organic products, impressive innovations, a wealth of inspiration and trends in food and other products, numerous opportunities for networking, and high-level professional debates.

BIOFACH World: all year round – around the globe

NürnbergMesse has proven expertise in the field of organic foodstuffs. Every year in February, the inter-



©NürnbergMesse / Erich Malter. BIOFACH Novelty Stand

national organic sector gathers in Nuremberg at BIOFACH, the world's leading trade fair for organic food. The comprehensive range of certified organic products on display shows their diversity – from fresh products like dairy and cheese, fruit, vegetables, to dry products like grains and pulses, nuts and confectionery and beverages. The international patron of BIOFACH is IFOAM – Organics

International, while the national supporting organization is the German Federation of Organic Food Producers (BÖLW). An integral part of this world-leading fair is the BIOFACH Congress, a knowledge-sharing platform that is unique worldwide. With another six BIOFACH events in China, India, Japan, South America, Thailand and the USA, BIOFACH World has a global presence.■

The next BIOFACH-events

- BIOFACH, Nuremberg:	12 - 15 February 2020
- BIOFACH JAPAN, Chiba (Tokyo):	10 - 13 March 2020
- BIOFACH CHINA, Shanghai:	13 - 15 May 2020
- BIOFACH AMERICA LATINA, São Paulo:	17 - 20 June 2020
- BIOFACH SOUTH EAST ASIA, Bangkok:	09 - 12 July 2020
- BIOFACH AMERICA, Philadelphia, PA:	24 - 26 September 2020
- BIOFACH INDIA, Delhi-NCR:	Fall 2020
- BIOFACH, Nuremberg:	17 - 20 February 2021



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Oriol Urrutia,
Director. comunicacion@bioecoactual.com

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ORGANIC MARKET

The decade that will transform Organic into a mass phenomenon

According to data from FiBL studies, published in its The World of Organic Agriculture yearbook, there were almost 70 million hectares of organic agricultural land in the world just 3 years ago. Of them 14.6 million hectares were in Europe. In 2017, according to the same study, the global market reached €92 billion, with North America at the top followed by Europe. The market and the data have already changed since then - updated data, provided by the new FiBL study, will be presented at BIOFACH in February 2020 - but organic will surely continue its unstoppable growth trend. It is inevitable. The market, consumers and the planet are asking for it.

The specialized organic market in Europe is experiencing a time of rapid changes. The conventional sector and large-scale distributors have made a strong entry into the market, monopolizing market share and forcing the specialized sector to professionalize and continue improving crosswise, from logistics to communication, in order to remain on the game board.

In Spain we are now experiencing these changes first-hand, perhaps later and with less prior preparation than other European countries. As Pedro López comments: "The history

of the organic sector in Spain is that of an unbalanced growth. High foreign but low domestic demand led to a strong development of primary production and a slow evolution of the industry and of the distribution and sales channel, which until recently maintained a comfortable status quo, with minimal industrial, logistics and sales structure". But I think this can be good, at least in a way: we need organic to be a mass phenomenon: it's compulsory for the Planet, for the health of our soils and farmers and for ourselves as consumers. We have to boost the organic sector as much as we can because this is the best for the society: it's common goods. Individuals and institutions need to know that a strong organic sector is needed to face our challenges (and take action!).

The experience of northern European countries, for example Denmark, is encouraging as operators and distribution channels from the conventional sector are becoming good allies of the organic sector: they are endorsing products without reducing their quality, and they are promoting the consumption of organic products among new and broader targets that were so far unreachable. Therefore we can say that they are using their greater resources for a good cause. It is not clear what role the conventional sector and the spe-



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cialized channel will end up playing in Southern Europe -Spain, Portugal or Italy-, as the process is still ongoing in these countries.

Despite this, how the balance of power and market share between the different channels will evolve is still a mystery throughout Europe. From the traditional German strong market model to the "new" French model -France is currently the European country with the fastest organic growth-, or from the well-established strong consumption shown by Austria or Denmark, to emerging Eastern countries led by Poland, 2020-2030 will undoubtedly be a decade of changes but, above all, it will be the decade in which 'ORGANIC' will conquer more and more supermarket shelves. The sector will grow: how and where is still uncertain, but the most important aspect for citizens, the planet and the sector as a whole is that growth is sustainable and at the same time fast enough to help us to solve the environmental and food problems and challenges we must face urgently.■

BIOECO ACTUAL

PUBLISHER: Centipede Films, S.L.

POWERED BY:

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D.L.: B.1619-2017

PRINT 20.000 COPIES

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 Carol Dunning,
Event Director | www.naturalproducts.co.uk

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NATURAL & ORGANIC PRODUCTS EUROPE

Europe's favourite natural business event is back at ExCeL London on 19-20 April 2020

Natural & Organic Products Europe 2020 will provide a vibrant choice of natural, organic, fairtrade, free-from, vegan, and vegetarian innovations.

For over twenty years Natural & Organic Products Europe has been bringing the world's natural, organic and sustainable businesses together to promote and facilitate trade. No other European natural and organic event attracts annually so many leading innovators, influencers, trailblazers and decision makers from across the industry together in one place (ExCeL London) at one time (19-20 April).

Visitors include independent stores, pharmacies, restaurants, cafés, contract caterers, hotels, salons and spas, plus senior buyers and decision makers from some of the UK and Europe's biggest retailers, wholesalers and distributors like Amazon, Boots, Holland & Barrett, Aldi, Lidl, M&S, Waitrose, Ocado, Tesco, Sainsbury's, Morrisons, Debenhams, House of Fraser, Superdrug, TK Maxx, Whole Foods Market, Infinity Foods, Planet Organic, and more.

When doors open on 19-20 April, around 700 exhibitors will be there to meet them – showcasing the best choice of natural, certified

organic, vegan, Fairtrade and free-from food, drink, VMS, cosmetics, skincare, and eco living products to hit the market.

What's new for 2020?

New for 2020, visiting buyers will discover the 'Spritz' area, a place to source an ample selection of the finest natural, organic, biodynamic and vegan wines, beers and no-and-low alcohol drinks – notably a rapidly growing sector in health and wellness. The show's Healthstore Networking Lounge (sponsored by the National Association of Healthstores and the Health Food Institute) will host Retailer Roundtable sessions. Another new feature includes the Organic Food Ingredients area where manufacturers and foodservice professionals can source quality certified organic ingredients, as they are.

The show will have its own dedicated 'Matchmaking App' where visitors will be able to arrange meetings with various brands throughout the two days, providing an efficient way to facilitate face to face meetings and build connections.

Lastly, visitors will be able to source the latest products, and vote for the best in the New Product



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Showcase area. From new start-ups with compelling origin stories to established brand pioneers championing new formulations and flavours – over the years the showcase has helped to introduce thousands of new brands and products into the market.

Trends, research and insights in three theatres

The much-anticipated seminar programme – renowned for its wealth of knowledge-based content aimed at the natural and organic food, health and beauty sector – will feature over 70 speakers across three theatres: The Natural Products Talks Theatre, The Natural Food Talks Theatre, and The Natural Beauty Talks Theatre.

Fronted by expert contributors, the seminars will feature a mix of fast-paced TED-style talks with lively panel discussions, covering a range of cutting-edge topics relevant in the natural and organic sector.

For the first time, Ocado's buying team will take to the stage in their first 'meet the buyers' session. Like the popular Holland & Barrett and Sainsbury 'Dragons Den' style pitches, this year exhibitors will also be in with the chance of gaining a listing with Ocado – all three of the pitching sessions are not to be missed.

For further information about visiting, exhibiting or getting involved in the next event, please visit: www.naturalproducts.co.uk. ■



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ORGANIC IN THE UK



UK organics stay strong despite continuing Brexit uncertainty

The UK organic industry continues to deliver growth despite continuing uncertainty about the impact of Brexit.

Data released towards the end of 2019 by Britain's lead organic body, the Soil Association, showed that UK organic food sales are now growing at double the rate of conventional. It was trend that was set to continue, the organisation said at its annual trade conference.

Speaking at the event, Mike Watkins, head of retail and business insight at consumer behaviour analysts Nielsen, said that the level of growth was "impressive" considering the rate of inflation in 2019 had been low. He also pointed out that consumer choices were becoming increasingly "planet-centric", as public awareness of climate change rose quickly. This, he said, played well for organic. He explained: "There's growing interest in organic as it's perceived as good for both individual and planet health. The mood of the nation is changing and there is a willingness to make sustainable changes that was not there a few years ago - I think we're at a tipping point. I expect to see a continued increase in demand for more products that are fresh, less processed and

better for the planet and I do believe organic food and drink can lead the way."

The Soil Association's business development director Clare McDermott, said consumers' changing priorities offered "a major opportunity for organic businesses who can clearly communicate the proven sustainable benefits of organic".

McDermott said: "The latest sales figures and our research both prove that shoppers are increasingly concerned about where their food comes from and how it is produced. If everyone involved in the organic movement, from retailers to producers, consistently and clearly reinforces the sustainable benefits of organic farming to both people and planet, then we can convert a desire for change into actions that support organic. We know that when shoppers hear of all the benefits that organic offers to the planet and wildlife, it becomes a no-brainer."

While the UK organic sector remains optimistic about the long-term future, concern at the continuing uncertainty around Brexit remains real. In particular, there is the damaging prospect of UK being effectively locked out of the



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EU market in the event of a no-deal departure from Europe (without a deal, Britain would need to apply for 'third country' status, which could take many months to gain approval).

Despite these concerns, the UK organic industry is also working hard to pave the way for a bright future for organic in a post-Brexit Britain.

The current UK Government has previously indicated that it wants a "Green Brexit", and a reform of food and farming policy that would prioritise 'public goods'.

With this in mind, a newly formed alliance of trade and research bodies – called the English Organic Forum (EOF) – has been putting pressure on the UK Government to acknowledge that organic food and farming is actually very

The UK organic industry is working hard to pave the way for a bright future for organic in a post-Brexit Britain

closely aligned with its aspirations for food and farming, and would be a very effective enabler of a Green Brexit. But to make a real difference with environmental targets, organic farming would need to represent at least 10% of UK food and farming, says EOF. That scale of ambition, if it were to attract Government buy-in, would set UK organics on course for unprecedented levels of expansion. The opportunity is undoubtedly real – the question is, will politicians take it? ■

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Vicky Holman, Event and Marketing Manager
www.organicfoodiberia.com

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ORGANIC FOOD IBERIA

Organic Food Iberia returns to IFEMA - Feria de Madrid on 3-4 June 2020

Iberia's essential international trade show of organic and natural products returns to IFEMA – Feria de Madrid, on 3-4 June 2020.

Organic Food Iberia is the most important organic trade show in the Mediterranean region. Its launch in 2019 was hailed as an overwhelming success by its joint organisers Diversified Communications and IFEMA – Feria de Madrid, which also benefited from strong government support, including the backing of the Ministries of Agriculture of Spain and Portugal. The show was launched as a direct result of the requests for a high-profile international trade fair for the Iberian Peninsula, and properly reflects the importance of the largest organic producing region in Europe on the international stage.

Organic Food Iberia is an event based on sound organic principles, promoted in close consultation with the organic industry to establish itself as the definitive networking, educational and business event of the year.

The inaugural event, which took place in June 2019 at IFEMA - Feria de Madrid welcomed 5240 quality attendees. From doors opening, the aisles were packed with big-name organic food retailers, multiple health stores owners, supermarket buyers, distributors and wholesalers – and plenty of Spanish press, TV and radio – all looking to spot trend-setting

organic and sustainable innovations from over 500 participating exhibitors.

Looking ahead to 2020, Organic Food Iberia and Eco Living Iberia will return to IFEMA-Feria de Madrid on the 3-4 of June with a new hall, new regions and an expanded floor space. It will showcase around 600 exhibitors presenting the best choice of organic foods and drinks, as well as eco living and beauty products, from across the Iberian Peninsula, the Mediterranean region and around the world.

Visitors will be able to see and sample delicacies and new innovations from national and international pavilions, including Austria, France, Italy, Greece, Korea, Castilla La Mancha, Navarra and many more. New and exciting brands like Santiveri, Dr. Goerg, Bambaw and Cafés Novell will be joining a selection of returning exhibitors, including Natimel, Capsa Food, Bodegas Cornelio, Sotto Le Stelle, Anecoop, and Hispania Organics.

Show features

Organic Wine Iberia, located within Organic Food Iberia, is a popular showcase of the very best organic wines, cavas, spirits, and drinks from



©2019 Organic Food Iberia. Carsten Holm and Susana de Andrés.

all over the international stage. Here, buyers can meet with producers and distributors from all over the world and taste the finest products in the Organic Wine Tasting Gallery.

Visitors will also find the very latest products in the market within two Innovation Zones. Here buyers and retailers can vote for their favourite innovative products, and these will determine the winners of the Eco & Organic Awards Iberia 2020.

A world-class education programme

Be inspired and educated at The Kitchen Theatre showcasing live cooking demonstrations by the very

best chefs from around the world who will use organic products from the very show floor. Meanwhile, the Organic Wine Theatre will offer visitors the chance to hear to key speakers in the organic wine industry. And in the Organic Talks Theatre, Eco Living Theatre, and Beauty Theatre, the latest trends and research from across the natural and organic health, beauty and food market will be shared in a comprehensive free-seminar programme.

For further information about visiting, exhibiting or getting involved in the next event, please visit:

www.organicfoodiberia.com
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Joan Picazos,
CEO, BIOCOOP Productos Biológicos, S.A. | biocop@biocop.es

The Spanish organic market: big changes!

The consumption of organic products usually has two main motivations: health and the environment. In Spain the most “personal” motivations prevail: the value given to nutrition and concerns for health, although the growing weight of millennial consumers, with a stronger environmental awareness, may alter the equation in the coming years. In fact, we are already seeing the expanding role of ecological demands (local products, packaging reduction...).

There is also a factor against organic consumption: foods that were generally offered by eco brands are becoming popular in their conventional version. It has been the case with seeds and other healthy food and it is happening now with plant-based meat substitutes.

In 2017 the organic market in Spain had a value of € 1.962M, that is 1.91% of food consumption. It has been a double-digit growth, sustained for years, and currently has a differential feature: it actually occurs in conventional sales channel, especially with private brands at low prices. In this context, special-

In the specialist channel there is an oversupply of products and brands



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ist companies in the sector, usually small, have serious difficulties in staying competitive and growing. This is the main reason why we are seeing a rapid concentration of the industry, with constant mergers and acquisitions. And this is also happening to distributors and wholesalers.

At the retail level, the most important event in the last three years has been the development of private brands in major discount stores. At the same time, the major retailers are reacting by listing more organic brands in their shelves and even promoting autonomous stores, separated from their supermarkets and mega stores. What we might call a “hybrid” channel, with outlets that are not organic specialists, but not exactly “conventional”, also gains importance. For example, fruit shops with a very evolved offer, attractive shopping experience and

growing presence of organic and local product.

In the specialist channel, there is an oversupply of products and brands, without defined leadership. This makes sales and promotions very important, and less work is done on building a distinctive sector with real added value. Organic outlets are the part of the supply suffering the most at this time of change. Small shops, which are majority in Spain, have to make great efforts to stay in the market. They often survive (especially in small towns) with a mixed offer of organic and dietary products, having not enough volume to keep fresh product sections attractive.

The map of organic supermarkets is changing rapidly. Small chains that were not efficient enough or had a poor value proposal have

The most important event in the last three years has been the development of private brands in major discount stores

disappeared. And the best ones are merging or being taken over, while trying to add more value to their offer (e.g. by expanding the number of SKUs or listing more exclusive products) and to differentiate themselves (e.g. with a more “healthy” approach). In this race to lead the evolution of the sector, models from other European countries who tried to settle in Spain have had very discreet results so far.

As for online sales through specialist sites, only heavily funded projects, usually from sources outside the sector are succeeding. Small scale projects only seem to thrive when based on specific products directly from the producer.

Finally, we must highlight the great opportunities still to be developed in the catering industry. The organic share of it is still very small. Presumably, when there is truly serious institutional support, the channel will develop as it is happening in many European countries. ■



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Free From Amsterdam North Edition addresses the future of 'free from'

Free From Functional & Health Ingredients (FFFHI) 2020 showcases the vast potential of the Free From, Vegan and Organic market, connecting retailers, traders, manufacturers and technologists alike.

The next upcoming north edition of FFFHI will bring around 400 market-leading exhibitors to Amsterdam on June 24-25. Looking at 2019/2020 and way beyond, the sector's most important platform will focus on free from, vegan, organic, functional and health foods and the ingredients that can be utilised in their creation. Up to 7,500 visitors from the food trade and industry are attending and will be able to explore the latest developments in these booming market categories, expand their international networks and enjoy a top-tier conference programme.

North Edition Amsterdam 2020 – South Edition Barcelona 2021

The North Edition of the two-day event will take place in the RAI Amsterdam, Exhibition and Conference Centre, and will celebrate its 8th annual edition in this vibrant city (Free From Barcelona South Edition will be back in Spain in 2021!).

This dedicated, specialised and proven trade event allow buyers from European multiple mainstream retail,

buyers from bio organic retail, food services, hotel & catering, category managers and marketers to source, learn, network and do better business in one convenient location. Attendees will be able to see first-hand the latest developments in free from, gluten and dairy free, vegan, organic ingredients, alongside natural and organic products that satisfy the ongoing trend towards healthy, diet & specialised foods from sustainable and natural sources.

High quality exhibitors & visitors

The list of exhibitors from 35 countries includes leading food producers such as Airos (Spain), Smaakt (Netherlands), Proceli (Spain), ALB-GOLD (Germany), Granarolo (Italy) and ingredient manufacturers such as Beneo (Germany), Glanbia (Belgium), Kentaur (Switzerland), Cambridge Commodities (UK) and Edlong (Ireland) as well as numerous companies from Italy like Newlat Food, Farmo, Molino Nicoli, Molino Favero, Molino di Ferro, that have raw materials and/or end products in their portfolios.

Visitors also include traders, trend scouts from organic food chains and health food stores, importers, private label executives and product managers from retail and from all other free from distribution channels like online retail.



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Evolving Free From Market

FFFHI reflects the evolving Free From market with Vegan and Organic, driven by a growing numbers of health-conscious consumers where consumers with clinically confirmed intolerances and allergies are no longer the only target audience. According to the European Shopper Survey (IRI 2017), vegan products now represent a welcome change for vegetarians and flexitarians.

More than a show: Networking and Education

The FFFHI conference programme also provides ground breaking insights: experts from retail, industry and

market research will present more than 60 free to attend lectures, seminars and workshops. Seats can be reserved in advance online.

An efficient matchmaking tool is available online to ensure that trade visitors and exhibitors are able to make the most effective use of the limited event time.

Pre-register for free access

Visitors who register online in advance will receive free admission to all exhibition areas, as well as the conference programme. Further information can be found at www.freefromfoodexpo.com or by e-mail at info@freefromfoodexpo.com.



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FREE FROM MARKET

Free From: a booming market. Interview with Ronald Holman

The Free From market is booming. This is not new, but year after year the trend becomes more and more a huge reality and an unstoppable inertia. Euromonitor pointed out in a recent study that "Free From Foods, valued at USD33 billion at a global level in 2016, still represents a small part of the health and wellness market, but has consolidated as the category with the most dynamic growth". According to Mordor Intelligence, the Global Free-From-Food market is expected to value at 337.85 billion, recording an estimated CAGR of 9.5% during 2019-2024. Kantar Worldpanel and Mintel have also highlighted the growth capacity and perspectives of the Free From market in the EU, the UK and worldwide. To understand better the momentum of the sector, we have talked with Ronald Holman, quite an expert on this subject and organizer of Free From Amsterdam 2020 & Free From Barcelona 2021.

The growth of plant based alternatives for meat lovers continues to be significant

What has been the biggest change in the Free From sector since you started working on it?

The market has evolved rapidly in a short period of time. The category is now well established and increasingly sophisticated. Initially, when we started there was a strong focus on gluten free, but the event now encompasses many more sectors including vegan, organic, and a wide range of products that omit specific allergens.

What will be the hottest trend in Free From in 2020?

The growth of plant based alternatives for meat lovers continues to be significant. This is set to continue as meat reduction remains one of the prevailing trends in food and drink. Similarly, there is a focus on other 'replacements' that deliver healthier alternatives, as well as Low Carb, Slow Carb and other Diet Food Solutions. Food for healthy aging and the growth of the 'low and no' alcohol sector are also some of the recurring topics that will be covered at this year's conference.

What would you recommend to a brand that wants to differentiate itself from its competitors in the Free From market?



(c) Centipede Films, S.L. Ronald Holman

New products should stand out for having genuinely beneficial health properties, and combine this with a strong sustainable / ethical offer. Consumers are increasingly looking for brands that satisfy the complete package.

In your opinion, which is the most inspiring country to look into its market and why?

Historically, the UK pioneered developments in the Free From category; however Spain, Italy, Germany and the Benelux countries are growing fast. All in all, the current situation shows a much more global

market. We have international exhibitors from 57 different countries attending the show this year.

Why is Free From Amsterdam a must-event for European professionals?

2020 will be our most comprehensive offering to date. We have five dedicated conference schedules delivering world class insight. The show is renowned for its high calibre exhibitors and trade only visitors who benefit from the numerous networking opportunities that we facilitate through roundtable and Matchmaking appointments.■

FOOD



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SANA

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A new fair in response to the new market trends

The latest market trends are stimulating new business opportunities that demand in-depth analysis and discussions among professional operators in the sectors involved.

Among the emerging trends: the growing attention towards organic and free-from products for people with food intolerances, the issue of traceability and Blockchain, which enables the traceability of the entire production process from the shopping trolley all the way back to the producers of the raw materials; the growing variety of health-related products on offer, mass catering, which through company choice or respect for directives, is increasingly turning towards products from the organic production chain and, finally, the greater presence on the shelves of the distribution channels of healthy snacks and ready meals, a phenomenon that correlates with the progressive reconfiguration of the concept of dinner and meals in general.

Highly contemporary issues that BolognaFiere will highlight at a new fair, which will support the now consolidated exhibition MarcabyBolognaFiere, and that will offer opportunities for in-depth analyses as well as a showcase for the wide array of innovative solutions that the market offers.

A Fair that is the result of the

long-standing collaboration with ADM (the Italian Association for the Grocery Retail sector) and the specific know-how of BolognaFiere in the organic sector, which has generated a new synergy between two international reference fairs hosted at the Bologna Exhibition Centre: SANA, the International Exhibition of Organic and Natural Products, which began more than 30 years ago, and MarcabyBolognaFiere, the Private Label Conference and Exhibition, now approaching its 16th edition.

The new initiative will be an innovative "Satellite Fair" in which the latest market trends will be explored in Focus sessions for professional operators through a brand new formula in which the exhibition and cultural content will be expressed in a highly flexible way.

Organic, free-from, traceability and mass catering are some of the key topics that the Fair will explore, on 15 and 16 January 2020, at the same time as MarcabyBolognaFiere, amplifying the business opportunities and potential for creating synergies. The initiative will take place in pavilion 28, which has recently been completed as part of the development and restyling plan at the Bologna Exhibition Centre that, thanks to a total investment of over €130 million, will increase the exhibition space by 30% on completion of



©Centipede Films, S.L.



©Centipede Films, S.L. SANA Novelty Stand

the project in 2024, further reinforcing BolognaFiere's leadership position.

SANA UP will be the space in which to provide visibility to the most innovative products in the organic sector. The most recent edition of SANA, which concluded successfully in September, highlighted the success of organic products, the dynamism of the sector and the constant search for new distribution channels, as well as the interest

of the large grocery retail groups in this production chain that, in just five years, have seen its revenues double. SANA UP therefore promises to serve as a showcase to preview the latest innovations from the world of organic products and to facilitate contact between producers in this sector (food and non-food) and representatives of the large grocery retail groups and other sales channels, which participate each year at MarcabyBolognaFiere. ■

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More than half of Italians claim that they consume organic food products at least once a week

In 2018 sales of organic food products of all types and in all channels -grocery retail, specialised organic retail points, neighbourhood stores, commercial restaurants, markets and G.A.S (Gruppi di Acquisto Solidale - Ethical purchasing Groups) - in Italy totalled €4,089 million, an increase of 5.3% on 2017 (based on the same perimeter of sales channels analysed) and with growth in the last decade equal to 171%.

Organic products in Italians' shopping trolleys

Organic products are increasingly present in the homes of Italians: 86% of Italians purchased an organic product at least once in 2018 (in 2012 organic purchasing households represented 53% of the total, indicating an increase of 8.4 million purchasing households in just 7 years!) and 51% claimed that they consumed organic food products at least once a week.

The growing consumer base demonstrates that organic products are an increasingly widespread and appreciated option. The reasons for this are mainly related to health and the envi-

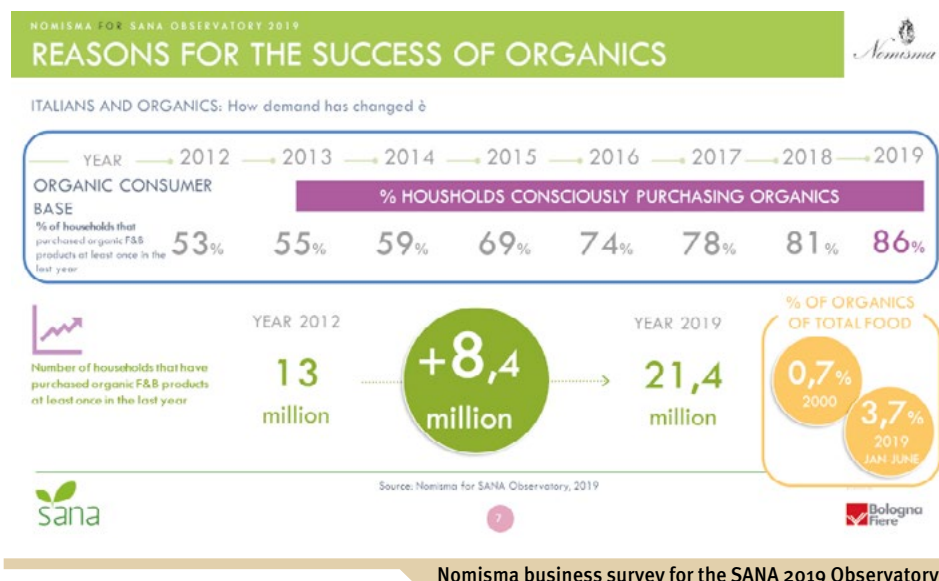
ronment but also to the growing awareness of issues such as sustainability, guarantees of safety and quality as well as safeguarding ecosystems.

Italians choose organic products because they support their values: 52% purchase organic products for health reasons, 47% because they offer greater guarantee of quality and safety, 26% because they respect the environment and pollute less.

Nowadays organic products are widespread across all distribution channels, underlining the fact that for consumers, having organic products on the shelves is a prerequisite.

Evidence of this can be found in the assortments in grocery retail: in 2018 the retail groups involved in grocery retail offered a total of 4,323 organic references, +28% compared with the previous year, with an average number of references per retail point of 161 units (Source: Bio Bank).

Sales are also experiencing parallel growth: set weight products sold through grocery retail (hypermarkets, supermarkets,



free service, small and discount supermarkets) generated sales of €1,658 billion (year ending June 2019, source: Nielsen), with an increase of 5.9% compared with the same period the previous year. Also increasing is the share of organic products in the average food shopping basket: today equal to 3.7% (in 2000 this was 0.7%), source: Nielsen). Eggs (€98 million, year ending June 2019, source: Nielsen), fruit-based spreads (€89 million) and rice cakes (€51 million) were the leading product categories that have driven sales of organic products in the grocery retail sector.

Italian Organic Exports

This positive performance is not confined solely to the domestic market. The export of Italian organic food products reached €2.3 billion in 2018, registering further growth (+10% compared to 2017) and achieving a significant role among the range of 'Made in Italy' products (5.5% of total Italian food exports). Growth that is clearly even more impressive than that for Italian food exports as a whole, which exceeded a figure of €41 billion in 2018, an increase of +1.3% over the previous year. ■

FOOD

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 Valérie Lemant,
 Event Manager | www.natexpo.com

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NATEXPO

Natexpo 2020: a major trade show in the organic sector

France's leading organic B2B trade-show and major industry event for over thirty years, Natexpo, is back in 2020. This year's now annual show will be held at the heart of a leading organic region, on the doorstep of the most prolific organic production grounds in France, at Eurexpo Lyon on 21 and 22 September.

At the last Lyon edition in 2018, 680 exhibitors came together to discuss and debate the issues facing the sector. In 2020, over **850 exhibitors** and **10,000 visitors** are expected.

Natexpo is the meeting hub for the market players of a highly dynamic sector, all driven by a shared desire to contribute to help society engage in healthy and responsible consumption. All sectors are represented, and all players are present: a true showcase of the organic market in France and abroad, Natexpo is growing with and for a market that innovates and proposes a meaningful vision. Companies present their new solutions addressing the notions of the circular economy, anti-waste, eco-design or innovative services for ethical retail.

Natexpo 2020 will be structured around six exhibition areas:

- Food
- Cosmetics
- Health Food & Dietary Supplements

- Equipment & Services for Retail
- Ingredients & Raw Materials
- Household and Personal Products and Services

Three villages have also been allocated to organic small businesses:

- The Organic Incubator
- The Cosmetics Innovations Village, for new beauty brands
- The Lab, for start-ups working in the circular economy

There will be of course unmissable events on the 2020 programme: **the New Product Gallery**, where 200 star products will be exhibited throughout the show; **the Natexpo Awards**, which recognizes the year's most innovative products; and **the Natexbio Challenge**, a programme to support project drivers.

Over the years, Natexpo has gone increasingly global; 25% of the exhibitors are now international and visitors come from 80 different countries.

The numerous events organised at the show enable buyers and decision-makers to get up-to-date on the latest trends of the time to seize new opportunities and build new partnerships.

The sector's leading experts will



©Nicolas Rodet

be there to offer their contributions on topical subjects: economic and statistical data on the organic market, consumer trends, innovations, regulations, regional initiatives, latest news in organic ingredients, etc. Professionals will receive tailored advice in the area of import/export or in the launch of organic stores. They will also have the opportunity to watch a series of cookery demonstrations.

Since 2019 the **Natexpo International Tour** has been part of that global expansion. It aims to bring market experts and distribution buyers together with processors eager to move into the targeted countries (Spain, Belgium, the Netherlands, Poland, Japan). During Natexpo Lyon you will also be able to

visit the Import/Export area, a space for conferences featuring experts from countries with fast-growing organic sectors.

The "Import/Export Office" located at the show will offer the visitors the opportunity to source tips and advice from experts on the levers to activate, develop and exchange with international markets: regulations, packaging, certification, expectations of targeted markets, etc.

Head to Eurexpo Lyon on 21 and 22 September 2020 and to Paris 24 to 26 October 2021.

For more information, please visit www.natexpo.com. ■



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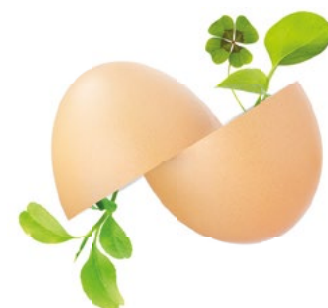
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6 AREAS

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- 🥤 Health Food and Dietary Supplements
- 🧴 Cosmetics and Hygiene
- 🌿 Ingredients and Raw Materials
- 🏠 Household and Personal Products and services
- 🛠 Services and Equipment for Retail

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Where it all begins



DISCOVER THE LATEST ORGANIC TRENDS

- **Natexpo Awards**
the best innovations of the year
- **New Product Gallery**
the vitality of the market illustrated by exhibitors' new products
- **Organic Incubator**
a springboard for small and medium-sized organic firms
- **The Lab**
an exhibition and project pitch space dedicated to circular economy start-ups

MORE INFO and **FREE BADGE** on www.natexpo.com

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Trends in France's organic sector

The organic sector is booming. French consumers are caring more about where the products they buy come from and the production techniques used. They want to buy healthy products and are even going back to homemade products. The shift has largely been triggered by environmental awareness. Organic products are becoming the answer to the demands for responsible consumption that benefits animals and our planet.

Diversifying organic sales

In 2018, 57% of French consumers reported having changed their dietary and culinary habits, with 43% buying more organic products, including eggs and dairy products, as well as fruits and vegetables, according to the most recent survey on the issue published by Anses, the national agency for food safety, environment, and work.

Food is the largest part of the organic sector. Industry players are trying to meet growing demand for more natural, better-quality products as well as the need for transparency.

Food ethics are emerging: for 97% of French consumers, buying organic means supporting the local economy and checking products' origins; 86% associate it with being more environmentally friendly;

and 89% say that organic products reflect their values better.

But the organic boom doesn't stop there: 2018 saw sharp rises in the non-food sectors. Over 60% of surveyed French consumers bought organic household products in that year and 57% turned to organic cosmetics and toiletries. We could also note a smaller but equally important movement in the textile sector, involving 30% of those surveyed.

Banking on future generations

Although more and more people are going organic, this new form of consumption seems to be most popular with generation Z. For ethical and social or animal welfare reasons, 18-24 year olds have decided to turn to more natural products. They give the information provided on organic products a 6.4/10 trust score and have a positive image of the products sold in supermarkets. However, probably due to lack of commercial and strategic vision, this population group are still infrequent organic shoppers. Therefore, it is important and necessary to promote and establish an organic culture amongst this generation.

Expectations of food service providers and retailers

In 2019, French expectations



123rf Limited@sylv1rob1. Organic food in a supermarket

of organic food service providers remain very high, with almost identical figures to 2018.

Around seven in ten French consumers are interested in organic food services outside the home. The location considered most important by 85% of surveyed parents is the school canteen. 78% of respondents also expressed an interest in restaurants, 76% in hospitals and 74% in care homes.

Moreover, seven in ten organic consumers would like a wider range in supermarkets. And nearly half of consumers would like more products to be available from artisans and markets.

tion grew by 24% last year, according to the study published by the French research institute Xerfi. The sector grows thanks to flexitarian consumers, 23 million people, shows the study. The forecast for the period 2019-2021 is an annual rate of 17% for vegetarian and vegan market in France reaching a volume of € 600 million by the end of 2021.

In 2018, the French organic sector accounted for € 9.7 billion and 5% of the food market. With all the potential changes underway, France, which is one of the industry leaders in Europe, can further expand organic consumption at home and abroad.

Sources: Agence Bio, Natexbio, Kantar TNS Food, IPSOS, Vegconomist. ■

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Event Manager | www.nordicorganicfoodfair.comTRADE
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The Nordic region's biggest trade shows for sustainable products return to MalmöMässan on 11-12 November 2020

Eco Life Scandinavia and the Nordic Organic Food Fair will be back at MalmöMässan on 11-12 November 2020. With hundreds of the latest new products on display, a packed education programme, busy show floor features and an inspirational co-located conference, Eco Life Scandinavia and the Nordic Organic Food Fair 2019 welcomed 4836 attendees (from 63 countries) through its doors in Malmö. The leading trade events for natural, organic, and sustainable food, drink, health, beauty and eco-living products enjoyed an 8% increase of attendees (from 2018) – confirming a continued trust in Scandinavia's sustainable industries.

The buyers, who came in their thousands, included leading representatives from Holland & Barrett, Life, Helsekost, 7-eleven Denmark, Lidl, IKEA Food, Biomarket, Planet Organic, Midsona, Malmö Stad, Coop Denmark, Coop Sverige, Magasin du Nord, Aldi, Retail House, Naturkost, and many more.

The 2020 compelling line-up will feature over 500 exhibitors, new international pavilions, fresh content (in three theatres), and the return of the Sustainability in Retail Forum – making the show an unmissable meeting place for the industry in Scandinavia.

Unmissable show features

With the news of ICA Sverige launching over 50 new vegan products in 2019 alone, the vegan trend shows no signs of slowing down. Reflecting this growth, the show's Vegan Zone will include innovations from a range of pioneering vegan companies. In 2019 this included big names brands like Follow Your Heart, Upton's Naturals, and Benevo Vegan Pet Food – to suit all areas of this rapidly growing lifestyle choice.

As well as vegan products, the number of free-from products in Sweden has increased by 20% (in 2017), therefore the show will also feature the best choice of free-from products to help buyers keep up to date with this expanding market.

Visitors of Natural Health & Beauty Scandinavia will be able to see and sample a wide selection of green, ethical, sustainable, cruelty-free, natural and organic beauty cosmetics, skincare and haircare, plus clean-label natural health VMS, sports nutrition, herbal medicines and more.

Co-located with Eco Life Scandinavia, the Nordic Organic Food Fair will display an unprecedented number of



Courtesy of Nordic Organic Food Fair

organic suppliers, showcasing the best certified organic ingredients, fresh produce, and pre-packed products from around the world. Buyers could also get a taste of what the world has to offer by visiting the show's range of regional and international pavilions – which last year included Try Swedish, Food from Finland, Organic Denmark, Estonia, and Italy. And in the new Naked Drinks Scandinavia area, visitors will be able to sample a sumptuous range of organic, natural, biodynamic, ethical, and vegan wines, beers, spirits and non-alcoholic alternatives from many countries around the world. Proving to be a popular and expanding category to invest in, the area will be even bigger and better in 2020.

Sustainability in Retail Forum

2020 will also see the return of the Sustainability in Retail Forum. Taking place on the first day of the show, this conference is designed to help senior executives within leading retailers from across the Nordic region to meet the ever-evolving challenges around sustainability.

For further information about visiting, exhibiting or getting involved in the next event, please visit:

www.ecolifeshow.com

www.nordicorganicexpo.com. ■



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ORGANIC IN SCANDINAVIA

Nordic region's organic industry powers on

The Nordic region continues to be an organic powerhouse, outperforming almost everywhere else in recent years in terms of growth rates and market penetration levels. Most indicators suggest that this trend is set to continue.

Denmark, which proudly claims to be 'the world's most organic nation' – where organic represents around 13% of the country's total food market – turned in another strong performance, with retail sales up by around 14%. And there was further good news for the organic sector during the year when the country's new centre-left government pledged to double organic food production and consumption by 2030 – a development that Organic Denmark described as a "historic breakthrough for organic".

Speaking earlier in the year at the inaugural Organic Food Iberia event in Madrid, Organic Denmark's international market director Pernille Bungård explained that a vital part of Denmark's success with organic had been down to the way key stakeholders work together. Winning over the country's major retailers had been a major priority for Organic Denmark. The organisation, said Bungård, had literally worked its way through all the major supermarkets, persuading them about the "organic opportunity". Even the country's



123rf Limited©Francis Dean. Fakta food supermarket

discount retailers were now on board with organic – in fact one of them, Netto, accounts for 12.2% of all organics sales.

Sweden's organic sector got a major boost in 2019 when new data showed the organic farmland had reached a 20% share (of total productive farmland in the country) for the first time. Figures released by the Swedish Board of Agriculture showed that organic farmland has increased by a remarkable 58% in Sweden in the previous ten years. The Swedish government's goal is for 30% of agricultural land to be organic by 2030.

But there was some less welcome news when data on Sweden's or-

ganic market compiled by Ekoweb showed that market growth had slowed sharply in 2018 – down to 4% (growth during the years 2015-17 peaked at an astonishing 35%). Ekoweb said that part of the reason for the slowdown was the result of the retail industry shifting its focus away from organic to other value propositions – plant-based, local and Swedish, for example.

New research from Finnish organic body Pro Luomu showed that the number of regular users of organic in Finland had risen by 150,000 in just two years, with one in three Finns now buying organic on a weekly basis.

Pro Luomu also launched the

One in three Finns buys now organic on a weekly basis

first European Organic Food Innovation Award. The award, open to organic businesses across Europe took the form of a 'pitching' competition held in front of a team of judges, including leading figures from the retail world.

In commercial activity, the Swedish organic and health food company Midsona continues to make headlines with a series of big ticket acquisitions. In August 2019, the Malmö-based company announced it had signed a deal worth €57 million to buy Alimentation Santé SAS – an organic and plant-based food business with operations in Spain and France. In September, Midsona announced it was adding the German organic spreads brand Eisblümerl to its growing portfolio.

Towards the end of the year, at the Nordic region's biggest organic food trade event Nordic Organic Food Fair, Coop Danmark and leading Scandinavian health food chain Lie Europe each picked up Best Retailer of the Year awards at a special ceremony in Malmö. ■

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Louise Lutikholt, Executive Director,
IFOAM - Organics International | www.ifoam.bio

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2020

ORGANIC MOVEMENT

Worldwide Organic Outlook. Improving Data, Engaging Citizens, and Implementing Smart Policies

Good data is one of the foundations for the development of organic agriculture. That is why the yearly 'The World of Organic Agriculture' statistics book is so important. Acreages, sales numbers, and turnover are essential, yet only tell part of the story.

Equally important is the context in which we look at the data. And the context and narrative are changing.

Growing Societal Awareness

The 'We Are Fed Up' demonstration held at the International Green week in Germany, the 'Fridays for Future' demonstrations, and the protests against the fires in the Amazon show that citizens do not want to be reduced to consumers sitting on the sidelines. They care about the environment and want to safeguard it for future generations.

Given the state of our Earth, we can no longer afford to discuss questions like "can organic feed the world?" when we should be asking, if anything, why the industrial model of agriculture is not feeding the world. Instead we should be highlighting what works, namely food systems that provide sufficient and nutritious food for all, minimize environmental impacts, and enable producers to earn a decent living. Food systems



123rf Limited © Cathy Yeulet

should benefit the public good, i.e. contribute to the Sustainable Development Goals, and help us live within our planetary boundaries. Here, organic agriculture has proven to be a valuable tool in policy-making as it balances and optimizes several 'goods' without adding to the 'public bads'.

Smart Policies: Crucial and Viable

Given the influence agriculture and food-related policies can have on farming and business practices, costs,

prices, and consumer choice, they can either perpetuate the status quo or pave the way to more sustainability. The publication 'Sustainability in Global Agriculture Driven by Organic Farming' shows how smart policies can trigger the required transition to true sustainability in agriculture.

Fortunately, the shift from competing narratives to a collaborative strategy has already begun. UN institutions are increasingly recognizing the role of agroecology as a science, a practice and a social movement that contributes to making agriculture

and food systems more sustainable. At the Committee of World Food Security's FAO meeting last October, represented countries expressed overwhelming support for the 'Scaling up Agroecology' Initiative. With the exception of a few countries, world leaders understand the multi-dimensional benefits that organic delivers.

This shift is pushed by honest conversations from citizens in their roles as voters. They understand how current chemical-based agriculture is causing more environmental harm than good. And many are puzzled by the fact that it is financially more advantageous to harm the environment, exploit people, and negatively affect health than it is to protect and enhance natural resources and strive for the well-being of our society.

Reaching New Audiences

We are honoured to support these conversations through our global campaigns, like 'Honest Food'. This campaign highlights that Honest Food is food with nothing to hide and is our way to reach those individuals who may not yet speak our language. By communicating clearly on the positive contributions of organic agriculture we can build new partnerships and together create greater awareness of how organic agriculture is part of the solution. ■



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