

The European Market for Organic Meat Products

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Abstracts

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Product Description:

Competition is stepping up in the European organic meat industry as a number of country markets suffer from overcapacity this year.

Organic meat supplies were falling short of demand for a number of years and this encouraged many meat producers in Europe to convert to organic production methods. This is causing large organic meat volumes to come into a market that is showing slowing growth rates. European sales of organic meat products market were increasing at over 20% per annum since 1998 however market growth is projected to slow to 9.5% this year.

Organic meat suppliers in countries like Denmark and Austria are alleviating excess capacity to export markets however opportunities are drying up as more countries become self-sufficient in terms of organic meat supplies. The German and British markets were the traditional targets of organic meat exporters and both countries have started to experience oversupplies.

In spite of revenues falling by almost a quarter in 2002, the German market remains the largest in Europe. Organic meat sales fell sharply in the middle of last year due to a food scandal involving organic grains. Consumer confidence in organic meat products is returning and positive growth is being observed again this year.

The Italian and British markets reported the highest growth in recent years. There has been a large rise in organic meat production in the UK and this is causing retailers to substitute imports with domestic products. The Italian market remains undersupplied

and organic meat imports continue from a number of countries

This report gives recommendations to companies in the organic meat industry. Attractive product segments are highlighted along with strategies to realise business opportunities. Although the large companies are expected to continue to dominate, there are opportunities for small-medium size suppliers and new entrants.

The organic meat products market is analysed in Germany, France, the UK, Italy, the Netherlands, Sweden and Denmark. Each country chapter has the following information for the organic beef, organic pork, organic poultry, and organic lamb segments:

- Market size (Revenues and Tonnage)
- Market Growth Rates, 2003-2008
- Market Drivers & Market Restraints
- Average Prices and Pricing Trends
- Import and Export Statistics
- Distribution Structure
- Competitive Analysis
- Market Shares of Leading Suppliers/Slaughterhouses
- Market Shares by Sales Channels
- Profiles of Leading Suppliers and Retailers

Country Coverage

Germany

France

Sweden

UK

Italy

Denmark

The Netherlands

Contents

INDUSTRY OVERVIEW

- Amount of organic farmland & organic farms in each country
- Regional distribution of organic farms & types of farms
- Major organic certifications, inspection bodies & associations
- Historical development of organic farming in country

INDUSTRY CHALLENGES

- The major challenges that affect the organic meat industry in each country e.g. government support, retailer role, consumer awareness, etc.
- The major challenges that affect companies in the organic meat products market

MARKET DRIVERS

- The major factors that are driving market growth in each country
- Factors behind consumer purchases of organic meat products

MARKET RESTRAINTS

- The major factors that are limiting market growth in each country
- Factors responsible for consumers not purchasing organic meat products

MARKET FORECASTS

- Revenue and volume forecasts, 2003-2009 for each product segment
- Projected market growth rates for each product segment

IMPORT ANALYSIS

- Level of imports by each product segment
- List of main import sources and importers

EXPORT ANALYSIS

- Level of exports by each product segment
- List of main export destinations and exporters

PRICING ANALYSIS

- Retail prices of organic meat products
- Price premium evaluation
- Factors affecting prices of organic meat products

DISTRIBUTION ANALYSIS

- Supply chain from farmers to consumers
- Listing of major companies in supply chain
- Analysis of major issues in distribution and supply-chain management

SUPPLIER ANALYSIS

- Market shares of companies by each product segment
- Details of major suppliers in each country
- Profiles of major suppliers / slaughterhouses

SALES ANALYSIS

- Sales breakdown by marketing channels
- Details of major companies in each channel category
- Trends and forecasts in marketing channels

RETAILER ANALYSIS

- Retail structure in country
- Profile of major retailers – supermarkets and specialist outlets

CONSUMER ANALYSIS

- Consumption rates of organic meat products per capita
- Market size of organic meat products market in relation to total market size
- Consumer profiles

LIST OF INDUSTRY PARTICIPANTS

- Major slaughterhouses, exporters, and importers

- Major retailers (supermarkets and specialist retailers)
- Major wholesalers & distributors
- Major industry associations & certification bodies

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