

ORGANIC FOODS AND BEVERAGES: GLOBAL MARKETS



FOD067A
June 2014

Natraj Pandal
Project Analyst

ISBN: 1-56965-851-X

bcc | Research
Market Forecasting

BCC Research
49 Walnut Park, Building 2
Wellesley, MA 02481 USA
866-285-7215 (toll-free within the USA),
or (+1) 781-489-7301
www.bccresearch.com
information@bccresearch.com

TABLE OF CONTENTS

TOPIC	PAGE NO.
CHAPTER 1 INTRODUCTION	2
STUDY GOALS AND OBJECTIVES	2
REASONS FOR DOING THE STUDY	2
SCOPE OF REPORT	3
INTENDED AUDIENCE	3
METHODOLOGY	3
INFORMATION SOURCES	3
ANALYST'S CREDENTIALS	4
RELATED BCC RESEARCH REPORTS	4
BCC RESEARCH ONLINE SERVICES	4
DISCLAIMER	4
CHAPTER 2 SUMMARY	6
<i>SUMMARY TABLE GLOBAL ORGANIC FOOD AND BEVERAGE MARKET BY REGION, THROUGH 2018 (\$ BILLIONS)</i>	6
<i>SUMMARY FIGURE GLOBAL ORGANIC FOOD AND BEVERAGE MARKET BY REGION, 2012-2018 (\$ BILLIONS)</i>	6
CHAPTER 3 OVERVIEW	10
CONVENTIONAL AND ORGANIC FOOD COMPARISON	10
<i>FIGURE 1 CONVENTIONAL AND ORGANIC FOOD COMPARISON (BUSHEL PER ACRE)</i>	11
<i>TABLE 1 DIFFERENCES BETWEEN CONVENTIONAL AND ORGANIC FARMING</i>	12
ORGANIC FOOD AND BEVERAGE SUPPLY CHAIN	12
<i>FIGURE 2 ORGANIC FOOD AND BEVERAGE SUPPLY CHAIN</i>	12
ORGANIC FOOD AND BEVERAGE MARKET STRUCTURE	13
<i>FIGURE 3 ORGANIC FOOD AND BEVERAGE MARKET STRUCTURE</i>	14
FOOD AND BEVERAGE RETAIL SALES	14
<i>TABLE 2 GLOBAL FOOD AND BEVERAGE MARKET BY REGION, THROUGH 2018 (\$ BILLIONS)</i>	15
ORGANIC PRODUCTS SEGMENTATION	15
<i>FIGURE 4 FRESH AND PROCESSED ORGANIC FOODS AND BEVERAGES, BY PRODUCT TYPE, 2012 (%)</i>	15
FRESH ORGANIC FOODS AND BEVERAGES	16
PROCESSED ORGANIC FOODS AND BEVERAGES	16
CONSUMER PERCEPTION OF ORGANIC PRODUCTS	16
GLOBAL ORGANIC CROPLAND DISTRIBUTION	17
<i>TABLE 3 GLOBAL ORGANIC CROPLAND DISTRIBUTION, 2011 (MILLION HECTARES)</i>	17
CHAPTER 4 ORGANIC FOOD AND BEVERAGE MARKET BY TYPE	20
<i>TABLE 4 GLOBAL ORGANIC FOOD AND BEVERAGE MARKET BY TYPE, THROUGH 2018 (\$ BILLIONS)</i>	20
ORGANIC FOOD	21
<i>TABLE 5 GLOBAL ORGANIC FOOD MARKET BY REGION, THROUGH 2018 (\$ BILLIONS)</i>	21
TYPES OF ORGANIC FOODS	22
<i>TABLE 6 GLOBAL ORGANIC FOOD MARKET BY PRODUCTS, THROUGH 2018 (\$ BILLIONS)</i>	22

TOPIC	PAGE NO.
Fruit and Vegetables	22
Dairy Products	23
Frozen and Processed Foods	23
Cereals	23
<i>TABLE 7 U.S. PRICES FOR ORGANIC GRAIN AND FEEDSTUFFS, 2013 AND 2014 (\$/BUSHEL)</i>	23
Maize or Corn	24
Wheat	24
Rice	25
Meat, Fish and Poultry Products	25
Organic Eggs	26
<i>FIGURE 5 U.S. PRICE TRENDS FOR ORGANIC AND CONVENTIONAL EGGS, 2005-2012 (\$/DOZEN)</i>	26
Beef	27
Pork	27
Poultry	28
Packaged Groceries	28
ORGANIC BEVERAGES	29
<i>TABLE 8 GLOBAL ORGANIC BEVERAGE MARKET BY REGION, THROUGH 2018 (\$ BILLIONS)</i>	29
<i>TABLE 9 GLOBAL ORGANIC BEVERAGE MARKET BY PRODUCTS, THROUGH 2018 (\$ BILLIONS)</i>	30
NON-DAIRY BEVERAGES	30
COFFEE AND TEA	30
OTHER BEVERAGES	30
ORGANIC SUPPLEMENTS	31
<i>TABLE 10 GLOBAL ORGANIC SUPPLEMENT MARKET BY REGION, THROUGH 2018 (\$ BILLIONS)</i>	31
CHAPTER 5 ORGANIC FOOD AND BEVERAGE MARKET BY REGION	34
GLOBAL ORGANIC FOOD AND BEVERAGE MARKET	34
<i>FIGURE 6 GLOBAL ORGANIC FOOD AND BEVERAGE MARKET BY REGION, 2012 (%)</i>	34
NORTH AMERICAN ORGANIC FOOD AND BEVERAGE MARKET	35
<i>TABLE 11 NORTH AMERICAN ORGANIC FOOD AND BEVERAGE MARKET BY TYPE, THROUGH 2018 (\$ BILLIONS)</i>	36
NORTH AMERICAN ORGANIC CROPLAND DISTRIBUTION	36
<i>TABLE 12 NORTH AMERICAN CROPLAND DISTRIBUTION, 2011 (MILLION HECTARES)</i>	37
NORTH AMERICAN ORGANIC FOOD AND BEVERAGE MARKET BY COUNTRY	37
<i>TABLE 13 NORTH AMERICAN ORGANIC FOOD AND BEVERAGE MARKET BY COUNTRY, THROUGH 2018 (\$ BILLIONS)</i>	37
NORTH AMERICAN ORGANIC FOOD AND BEVERAGE IMPORTS	37
<i>TABLE 14 NORTH AMERICAN ORGANIC FOOD AND BEVERAGE IMPORTS BY TYPE, THROUGH 2018 (\$ BILLIONS)</i>	38
<i>TABLE 15 NORTH AMERICAN ORGANIC FOOD AND BEVERAGE IMPORTS, BY COUNTRY, THROUGH 2018 (\$ BILLIONS)</i>	38
PENETRATION OF ORGANIC FOODS AND BEVERAGES IN NORTH AMERICA	39
<i>TABLE 16 PENETRATION OF ORGANIC FOODS AND BEVERAGES IN NORTH AMERICA, 2012-2018 (\$ BILLIONS/%)</i>	39
NORTH AMERICAN ORGANIC FOOD MARKET BY COUNTRY	39

TOPIC	PAGE NO.
<i>TABLE 17 NORTH AMERICAN ORGANIC FOOD MARKET BY COUNTRY, THROUGH 2018 (\$ BILLIONS)</i>	40
NORTH AMERICAN ORGANIC FOOD MARKET BY PRODUCTS	40
<i>TABLE 18 NORTH AMERICAN ORGANIC FOOD MARKET BY PRODUCTS, THROUGH 2018 (\$ BILLIONS)</i>	40
NORTH AMERICAN ORGANIC BEVERAGE MARKET BY COUNTRY	40
<i>TABLE 19 NORTH AMERICAN ORGANIC BEVERAGE MARKET BY COUNTRY, THROUGH 2018 (\$ BILLIONS)</i>	41
NORTH AMERICAN ORGANIC BEVERAGE MARKET BY PRODUCTS	41
<i>TABLE 20 NORTH AMERICAN ORGANIC BEVERAGE MARKET BY PRODUCTS, THROUGH 2018 (\$ BILLIONS)</i>	41
NORTH AMERICAN ORGANIC SUPPLEMENT MARKET BY COUNTRY	42
<i>TABLE 21 NORTH AMERICAN ORGANIC SUPPLEMENT MARKET BY COUNTRY, THROUGH 2018 (\$ MILLIONS)</i>	42
U.S.	42
U.S. Organic Crops	42
<i>TABLE 22 U.S. ORGANIC CROPS BY TYPE, THROUGH 2011 (THOUSAND ACRES)</i>	43
U.S. Organic Food and Beverage Sales	43
<i>TABLE 23 U.S. PER CAPITA ORGANIC CONSUMPTION, 2011-2018</i>	43
U.S. Organic Food and Beverage Retailers	44
<i>FIGURE 7 U.S. ORGANIC RETAIL SALES CHANNELS, 2012 (%)</i>	44
<i>TABLE 24 U.S. TOP BRANDS FOR ORGANIC PACKAGED FOODS, THROUGH 2012 (%)</i>	45
U.S. Organic Food and Beverage Products	46
<i>FIGURE 8 U.S. ORGANIC MARKET BY PRODUCT, 2012 (%)</i>	46
U.S. Organic Food and Beverage Imports	47
<i>FIGURE 9 U.S. ORGANIC FOOD AND BEVERAGE IMPORTS, 2013 (%)</i>	47
U.S. Organic Food and Beverage Exports	48
<i>FIGURE 10 U.S. ORGANIC FRESH FRUIT AND VEGETABLE EXPORTS, 2013 (%)</i>	48
Penetration of Organic Packaged Foods in U.S.	49
<i>TABLE 25 PENETRATION OF ORGANIC PACKAGED FOOD IN OVERALL PACKAGED FOOD U.S. MARKET, 2012-2018 (% OF TOTAL MARKET)</i>	49
U.S. Organic Food Prices	49
<i>TABLE 26 PROJECTED U.S. AVERAGE PRICES FOR ORGANIC PACKAGED FOOD, 2009-2018 (\$/KILOGRAM)</i>	50
U.S. Organic Beverage Market	50
U.S. Organic Hot Drink Market	50
<i>TABLE 27 U.S. ORGANIC HOT DRINK MARKET BY PRODUCTS, THROUGH 2018 (\$ MILLIONS)</i>	50
<i>TABLE 28 PENETRATION OF ORGANIC HOT DRINKS IN OVERALL U.S. HOT DRINK MARKET, 2012-2018 (% OF TOTAL MARKET)</i>	51
<i>TABLE 29 U.S. AVERAGE PRICES FOR ORGANIC HOT DRINKS, 2009-2014 (\$/KILOGRAM)</i>	52
U.S. Organic Juice Market	52
<i>TABLE 30 U.S. ORGANIC JUICE MARKET BY TYPE, THROUGH 2018 (\$ MILLIONS)</i>	53
<i>TABLE 31 PENETRATION OF ORGANIC JUICE IN OVERALL U.S. JUICE MARKET, 2012-2018 (% OF TOTAL MARKET)</i>	53
<i>TABLE 32 U.S. AVERAGE PRICES FOR ORGANIC JUICE, 2009-2014 (\$/LITER)</i>	53
MEXICO	54
Mexico Organic Food and Beverage Sales	54
<i>TABLE 33 MEXICO PER CAPITA ORGANIC CONSUMPTION, 2011 AND 2018</i>	55

TOPIC	PAGE NO.
CANADA	55
Organic Food and Beverage Sales in Canada	55
<i>TABLE 34 CANADA PER CAPITA ORGANIC CONSUMPTION, 2011 AND 2018</i>	56
Organic Food and Beverage Products in Canada	56
<i>FIGURE 11 ORGANIC MARKET BY PRODUCTS IN CANADA, 2012 (%)</i>	56
Canada Organic Packaged Groceries	57
<i>TABLE 35 TOP TEN ORGANIC PACKAGED GROCERIES IN CANADA BY PRODUCT, THROUGH 2018 (\$ MILLIONS)</i>	57
Organic Food and Beverage Products Produced in Canada	58
<i>FIGURE 12 TOP TEN CATEGORIES OF ORGANIC PRODUCTS PRODUCED IN CANADA (%)</i>	58
EUROPE ORGANIC FOOD AND BEVERAGE MARKET	59
EUROPEAN ORGANIC CROPLAND DISTRIBUTION	59
<i>TABLE 36 EUROPEAN ORGANIC CROPLAND DISTRIBUTION, 2011 (MILLION HECTARES)</i>	59
EUROPEAN ORGANIC FOOD AND BEVERAGE MARKET BY COUNTRY	60
<i>TABLE 37 EUROPEAN ORGANIC FOOD AND BEVERAGE BY COUNTRY, THROUGH 2018 (\$ BILLIONS)</i>	60
Penetration of Organic Foods and Beverages in Europe	60
<i>TABLE 38 PENETRATION OF ORGANIC FOODS AND BEVERAGES IN EUROPE, 2012-2018 (\$ BILLIONS)</i>	61
EUROPEAN ORGANIC FOOD AND BEVERAGE IMPORTS BY TYPE	61
<i>TABLE 39 EUROPEAN ORGANIC FOOD AND BEVERAGE IMPORTS BY TYPE, THROUGH 2018 (\$ BILLIONS)</i>	62
EUROPEAN ORGANIC FOOD AND BEVERAGE IMPORTS BY COUNTRY	62
<i>TABLE 40 EUROPEAN ORGANIC FOOD AND BEVERAGE IMPORTS BY COUNTRY, THROUGH 2018 (\$ BILLIONS)</i>	62
EUROPEAN ORGANIC FOOD AND BEVERAGE MARKET BY TYPE	63
<i>TABLE 41 EUROPEAN ORGANIC FOOD AND BEVERAGE MARKET BY TYPE, THROUGH 2018 (\$ BILLIONS)</i>	63
EUROPEAN ORGANIC FOOD MARKET BY COUNTRY	63
<i>TABLE 42 EUROPEAN ORGANIC FOOD MARKET BY COUNTRY, THROUGH 2018 (\$ BILLIONS)</i>	63
EUROPEAN ORGANIC FOOD MARKET BY TYPE	64
<i>TABLE 43 EUROPEAN ORGANIC FOOD MARKET BY PRODUCTS, THROUGH 2018 (\$ BILLIONS)</i>	64
EUROPEAN ORGANIC BEVERAGE MARKET BY COUNTRY	64
<i>TABLE 44 EUROPEAN ORGANIC BEVERAGE MARKET BY COUNTRY, THROUGH 2018 (\$ BILLIONS)</i>	65
EUROPEAN ORGANIC BEVERAGE MARKET BY TYPE	65
<i>TABLE 45 EUROPE ORGANIC BEVERAGE MARKET BY PRODUCTS, THROUGH 2018 (\$ BILLIONS)</i>	65
EUROPEAN ORGANIC SUPPLEMENT MARKET BY COUNTRY	65
<i>TABLE 46 EUROPEAN ORGANIC SUPPLEMENT MARKET BY COUNTRY, THROUGH 2018 (\$ MILLIONS)</i>	66
U.K.	66
U.K. Organic Food and Beverage Sales	66
<i>TABLE 47 U.K. PER CAPITA ORGANIC CONSUMPTION, 2011 AND 2018</i>	67
U.K. Organic Food and Beverage Products	67
<i>FIGURE 13 U.K. ORGANIC FOOD AND BEVERAGE MARKET BY PRODUCTS, 2012 (%)</i>	67

TOPIC	PAGE NO.
GERMANY	68
German Organic Food and Beverage Sales	68
<i>TABLE 48 GERMAN PER CAPITA ORGANIC CONSUMPTION, 2011-2018</i>	68
German Organic Food and Beverage Products	69
<i>FIGURE 14 GERMAN ORGANIC FOOD AND BEVERAGE MARKET BY PRODUCTS, 2012 (%)</i>	69
FRANCE	70
France Organic Food and Beverage Sales	70
<i>TABLE 49 FRANCE PER CAPITA ORGANIC CONSUMPTION, 2011 AND 2018</i>	70
French Organic Food and Beverage Products	70
<i>FIGURE 15 FRENCH ORGANIC FOOD AND BEVERAGE MARKET BY PRODUCTS, 2012 (%)</i>	70
French Organic Food and Beverage Retailers	72
<i>FIGURE 16 FRENCH ORGANIC MARKET BY RETAIL DISTRIBUTION, 2012 (%)</i>	72
ITALY	72
Italy Organic Food and Beverage Sales	73
<i>TABLE 50 ITALY PER CAPITA ORGANIC CONSUMPTION, 2011 TO 2018</i>	73
OTHER EUROPEAN COUNTRIES	73
ASIA ORGANIC FOOD AND BEVERAGE MARKET	74
ASIAN ORGANIC CROPLAND DISTRIBUTION	74
<i>TABLE 51 ASIAN ORGANIC CROPLAND DISTRIBUTION, 2011 (MILLION HECTARES)</i>	74
ASIAN ORGANIC FOOD AND BEVERAGE MARKET BY COUNTRY	75
<i>TABLE 52 ASIAN ORGANIC FOOD AND BEVERAGE MARKET BY COUNTRY, THROUGH 2018 (\$ BILLIONS)</i>	75
PENETRATION OF ORGANIC FOOD AND BEVERAGE IN ASIA	76
<i>TABLE 53 PENETRATION OF ORGANIC FOOD AND BEVERAGE IN ASIA, 2012-2018 (\$ BILLIONS/%)</i>	76
ASIAN ORGANIC FOOD AND BEVERAGE MARKET BY TYPE	77
<i>TABLE 54 ASIAN ORGANIC FOOD AND BEVERAGE MARKET BY TYPE, THROUGH 2018 (\$ BILLIONS)</i>	77
ASIAN ORGANIC FOOD MARKET BY COUNTRY	77
<i>TABLE 55 ASIAN ORGANIC FOOD MARKET BY COUNTRY, THROUGH 2018 (\$ BILLIONS)</i>	77
ASIAN ORGANIC FOOD MARKET BY TYPE	78
<i>TABLE 56 ASIAN ORGANIC FOOD MARKET BY PRODUCTS, THROUGH 2018 (\$ BILLIONS)</i>	78
ASIAN ORGANIC BEVERAGE MARKET BY COUNTRY	78
<i>TABLE 57 ASIAN ORGANIC BEVERAGE MARKET BY COUNTRY, THROUGH 2018 (\$ MILLIONS)</i>	79
ASIAN ORGANIC BEVERAGE MARKET BY TYPE	79
<i>TABLE 58 ASIAN ORGANIC BEVERAGE MARKET BY PRODUCTS, THROUGH 2018 (\$ BILLIONS)</i>	79
ASIAN ORGANIC SUPPLEMENT MARKET BY COUNTRY	79
<i>TABLE 59 ASIA ORGANIC SUPPLEMENT MARKET BY COUNTRY, THROUGH 2018 (\$ MILLIONS)</i>	80
CHINA	80
Chinese Organic Food and Beverage Sales	81
<i>TABLE 60 CHINESE PER CAPITA ORGANIC CONSUMPTION, 2011 AND 2018</i>	81
INDIA	81

TOPIC	PAGE NO.
Indian Organic Food and Beverage Sales	82
<i>TABLE 61 INDIAN PER CAPITA ORGANIC CONSUMPTION, 2011 AND 2018</i>	82
Indian Organic Farming Products	82
<i>TABLE 62 MAJOR ORGANIC FARMING PRODUCTS PRODUCED IN INDIA</i>	82
Indian Organic Food and Beverage Exports	83
<i>FIGURE 17 MAJOR ORGANIC PRODUCTS EXPORTED FROM INDIA (%)</i>	83
JAPAN	83
Japanese Organic Food and Beverage Imports	84
<i>TABLE 63 MAJOR PRODUCTS IMPORTED FROM THE U.S. TO JAPAN</i>	84
Japanese Organic Food and Beverage Sales	85
<i>TABLE 64 JAPANESE PER CAPITA ORGANIC CONSUMPTION, 2011 AND 2018</i>	85
OTHER ASIAN COUNTRIES	85
REST OF WORLD	86
ROW ORGANIC CROPLAND DISTRIBUTION	86
<i>TABLE 65 ROW ORGANIC CROPLAND DISTRIBUTION, 2011 (MILLION HECTARES)</i>	86
ROW ORGANIC FOOD AND BEVERAGE MARKET BY COUNTRY	87
<i>TABLE 66 ROW ORGANIC FOOD AND BEVERAGE MARKET BY COUNTRY, THROUGH 2018 (\$ MILLIONS)</i>	87
ROW ORGANIC FOOD AND BEVERAGE MARKET BY TYPE	88
<i>TABLE 67 ROW ORGANIC FOOD AND BEVERAGE MARKET BY TYPE, THROUGH 2018 (\$ MILLIONS)</i>	88
CHAPTER 6 GOVERNMENT REGULATIONS	90
<i>TABLE 68 MAJOR REGULATORY BODIES FOR ORGANIC FOODS AND BEVERAGES</i>	90
NORTH AMERICA	90
EUROPE	91
ASIA	91
REST OF WORLD	92
CHAPTER 7 INDUSTRY STRUCTURE	95
FACTORS INFLUENCING DEMAND	95
<i>TABLE 69 DRIVERS OF ORGANIC FOOD AND BEVERAGE MARKET, 2010-2018</i>	95
INCREASING CONSUMER AWARENESS	95
<i>FIGURE 18 CONSUMER PREFERENCE FOR ORGANIC FOODS AND BEVERAGES</i>	96
GROWING AMOUNTS OF ORGANIC FARMLAND	97
ACCESSIBILITY OF ORGANIC PRODUCTS	97
<i>FIGURE 19 SHIFT IN SALES CHANNELS FOR ORGANIC FOODS AND BEVERAGES, 2010 AND 2015 (%)</i>	97
ACCEPTANCE OF NEW ORGANIC STANDARDS	99
<i>TABLE 70 UNIFORMITY AND STRICTNESS OF ORGANIC STANDARDS, BY COUNTRY, 2012 AND 2018</i>	99
RISING PER CAPITA INCOME IN DEVELOPING COUNTRIES	100
<i>TABLE 71 PER CAPITA INCOME IN MAJOR DEVELOPING COUNTRIES, 2008 AND 2012 (\$)</i>	100
CHALLENGES IN THE ORGANIC FOOD AND BEVERAGE MARKET	100
HIGH ORGANIC FOOD PRICES	100
<i>FIGURE 20 FACTORS FOR HIGH PRICES OF ORGANIC FOODS</i>	101
EXPENSIVE CONVERSION PROCESS FOR ORGANIC FARMING	102

TOPIC	PAGE NO.
U.S. AND EUROPEAN SUPPLY AND DEMAND DEFICIT	102
FUND SHORTAGES AND LOW SUBSIDIES FOR ORGANIC PRODUCERS	102
OPPORTUNITIES FOR ORGANIC FOOD AND BEVERAGE COMPANIES	103
HUGE EXPORT POTENTIAL IN EMERGING COUNTRIES	103
ENTERPRISE DEVELOPMENT	103
PORTER'S FIVE FORCES ANALYSIS	103
<i>FIGURE 21 PORTER'S FIVE FORCE ANALYSIS</i>	104
BARGAINING POWER OF SUPPLIERS	104
BARGAINING POWER OF BUYERS	104
THREAT FROM NEW ENTRANTS	105
THREAT FROM SUBSTITUTES	105
COMPETITIVE RIVALRY	105
CHAPTER 8 MARKET STRATEGIES	107
GROWTH STRATEGIES	107
<i>FIGURE 22 GLOBAL ORGANIC FOOD AND BEVERAGE MARKET GROWTH STRATEGIES, 2008-2013 (%)</i>	107
GROWTH STRATEGIES BY REGION	108
<i>FIGURE 23 GLOBAL ORGANIC FOOD AND BEVERAGE GROWTH STRATEGIES, BY REGION, 2008-2013 (%)</i>	108
GROWTH STRATEGIES BY COMPANY	109
<i>FIGURE 24 GLOBAL ORGANIC FOOD AND BEVERAGE GROWTH STRATEGIES, ACTIVITY BY COMPANY, 2008-2013 (%)</i>	109
NEW PRODUCT DEVELOPMENT	111
<i>TABLE 72 NEW ORGANIC PRODUCT LAUNCHES, 2008-2013</i>	111
MERGERS AND ACQUISITIONS	116
<i>TABLE 73 MERGERS AND ACQUISITIONS, 2008-2013</i>	116
PARTNERSHIPS, COLLABORATIONS, JOINT VENTURES AND AGREEMENTS	119
<i>TABLE 74 PARTNERSHIPS, COLLABORATIONS, JOINT VENTURES AND AGREEMENTS, 2008-2012</i>	119
EXPANSIONS	122
<i>TABLE 75 EXPANSIONS, 2008-2013</i>	122
CHAPTER 9 PATENT EVALUATION	126
PATENTS BY REGION	126
<i>FIGURE 25 ORGANIC FOOD AND BEVERAGE PATENT ANALYSIS, BY REGION, 2004-2013 (%)</i>	126
<i>TABLE 76 ORGANIC FOOD AND BEVERAGE PATENT ANALYSIS, 2004-2013 (NUMBER OF PATENTS)</i>	127
ORGANIC FOOD AND BEVERAGE PATENTS BY MANUFACTURER/ RESEARCH INSTITUTE	127
<i>TABLE 77 ORGANIC FOOD AND BEVERAGE PATENT ANALYSIS, BY COMPANY, 2004-2013 (NUMBER/%)</i>	127
<i>TABLE 78 U.S. ORGANIC FOOD AND BEVERAGE PATENTS, 2008-2013</i>	128
<i>TABLE 79 EUROPEAN ORGANIC FOOD AND BEVERAGE PATENTS, 2009-2012</i>	132
<i>TABLE 80 JAPANESE ORGANIC FOOD AND BEVERAGE PATENTS, 2009-2012</i>	134
CHAPTER 10 MARKET SHARES AND COMPANY PROFILES	138
COMPANY MARKET SHARES	138

TOPIC	PAGE NO.
<i>TABLE 81 MARKET SHARE OF ORGANIC FOOD AND BEVERAGE COMPANIES, 2012 (\$ BILLIONS/%)</i>	138
COMPANY PROFILES	139
AEON CO. LTD.	139
Overview	139
Financials	139
Products and Services	139
Strategy	140
AMY'S KITCHEN INC.	140
Overview	140
Financials	140
Products and Services	140
Strategy	141
ALBERT'S ORGANICS INC.	141
Overview	141
Financials	141
Products and Services	141
Strategy	142
APPLEGATE FARMS LLC	142
Overview	142
Financials	142
Products and Services	142
Strategy	142
CARREFOUR SA	143
Overview	143
Financials	143
Products and Services	143
Strategy	143
CLIF BAR AND COMPANY	144
Overview	144
Financials	144
Products and Services	144
Strategy	144
COLEMAN NATURAL FOODS LLC	144
Overview	145
Financials	145
Products and Services	145
Strategy	145
CONAGRA FOODS INC.	145
Overview	146
Financials	146
Products and Services	146
Strategy	146
DAKOTA BEEF LLC	146
Overview	146
Financials	147
Products and Services	147
Strategy	147

TOPIC	PAGE NO.
DEAN FOODS COMPANY	147
Overview	147
Financials	148
Products and Services	148
Strategy	148
EARTHBOUND FARM INC.	148
Overview	148
Financials	148
Products and Services	149
Strategy	149
FLORIDA CRYSTALS CORP.	149
Overview	149
Financials	149
Products and Services	149
Strategy	150
GENERAL MILLS INC.	150
Overview	150
Financials	150
Products and Services	150
Strategy	151
HAIN CELESTIAL GROUP INC.	151
Overview	151
Financials	151
Products and Services	151
Strategy	152
HIPP GMBH & CO. VERTRIEB KG	152
Overview	152
Financials	152
Products and Services	152
Strategy	153
KRAFT FOODS INC.	153
Overview	153
Financials	153
Products and Services	153
Strategy	153
THE KROGER CO.	154
Overview	154
Financials	154
Products and Services	154
Strategy	155
METRO AG	155
Overview	155
Financials	155
Products and Services	155
Strategy	155
WM MORRISONS	156
Overview	156

TOPIC	PAGE NO.
Financials	156
Products and Services	156
Strategy	156
NATURE'S PATH FOODS INC.	157
Overview	157
Financials	157
Products and Services	157
Strategy	157
ODWALLA INC.	157
Overview	158
Financials	158
Products and Services	158
Strategy	158
ORGANIC FARM FOODS LTD.	158
Overview	158
Financials	159
Products and Services	159
Strategy	159
ORGANIC VALLEY FAMILY OF FARMS	159
Overview	159
Financials	160
Products and Services	160
Strategy	160
RAPUNZEL NATURKOST AG	160
Overview	160
Financials	160
Products and Services	161
Strategy	161
SAFEWAY INC.	161
Overview	161
Financials	162
Products and Services	162
Strategy	162
SAINSBURY'S SUPERMARKETS LTD.	162
Overview	162
Financials	162
Products and Services	163
Strategy	163
SUNOPTA INC.	163
Overview	163
Financials	163
Products and Services	164
Strategy	164
TESCO PLC.	164
Overview	164
Financials	165
Products and Services	165

TOPIC	PAGE NO.
Strategy	165
TRADER JOE'S	165
Overview	165
Financials	165
Products and Services	166
Strategy	166
WAITROSE LTD.	166
Overview	166
Financials	166
Products and Services	166
Strategy	167
WAL-MART STORES INC.	167
Overview	167
Financials	167
Products and Services	167
Strategy	168
WHOLE FOODS MARKET INC.	168
Overview	168
Financials	168
Products and Services	168
Strategy	168
CHAPTER 11 APPENDIX	170
TABLE 82 LIST OF ACRONYMS	170

LIST OF TABLES

TABLE HEADING	PAGE NO.
SUMMARY TABLE GLOBAL ORGANIC FOOD AND BEVERAGE MARKET BY REGION, THROUGH 2018 (\$ BILLIONS)	6
TABLE 1 DIFFERENCES BETWEEN CONVENTIONAL AND ORGANIC FARMING	12
TABLE 2 GLOBAL FOOD AND BEVERAGE MARKET BY REGION, THROUGH 2018 (\$ BILLIONS)	15
TABLE 3 GLOBAL ORGANIC CROPLAND DISTRIBUTION, 2011 (MILLION HECTARES)	17
TABLE 4 GLOBAL ORGANIC FOOD AND BEVERAGE MARKET BY TYPE, THROUGH 2018 (\$ BILLIONS)	20
TABLE 5 GLOBAL ORGANIC FOOD MARKET BY REGION, THROUGH 2018 (\$ BILLIONS)	21
TABLE 6 GLOBAL ORGANIC FOOD MARKET BY PRODUCTS, THROUGH 2018 (\$ BILLIONS)	22
TABLE 7 U.S. PRICES FOR ORGANIC GRAIN AND FEEDSTUFFS, 2013 AND 2014 (\$/BUSHEL)	23
TABLE 8 GLOBAL ORGANIC BEVERAGE MARKET BY REGION, THROUGH 2018 (\$ BILLIONS)	29
TABLE 9 GLOBAL ORGANIC BEVERAGE MARKET BY PRODUCTS, THROUGH 2018 (\$ BILLIONS)	30
TABLE 10 GLOBAL ORGANIC SUPPLEMENT MARKET BY REGION, THROUGH 2018 (\$ BILLIONS)	31
TABLE 11 NORTH AMERICAN ORGANIC FOOD AND BEVERAGE MARKET BY TYPE, THROUGH 2018 (\$ BILLIONS)	36
TABLE 12 NORTH AMERICAN CROPLAND DISTRIBUTION, 2011 (MILLION HECTARES)	37
TABLE 13 NORTH AMERICAN ORGANIC FOOD AND BEVERAGE MARKET BY COUNTRY, THROUGH 2018 (\$ BILLIONS)	37
TABLE 14 NORTH AMERICAN ORGANIC FOOD AND BEVERAGE IMPORTS BY TYPE, THROUGH 2018 (\$ BILLIONS)	38
TABLE 15 NORTH AMERICAN ORGANIC FOOD AND BEVERAGE IMPORTS, BY COUNTRY, THROUGH 2018 (\$ BILLIONS)	38
TABLE 16 PENETRATION OF ORGANIC FOODS AND BEVERAGES IN NORTH AMERICA, 2012-2018 (\$ BILLIONS/%)	39
TABLE 17 NORTH AMERICAN ORGANIC FOOD MARKET BY COUNTRY, THROUGH 2018 (\$ BILLIONS)	40
TABLE 18 NORTH AMERICAN ORGANIC FOOD MARKET BY PRODUCTS, THROUGH 2018 (\$ BILLIONS)	40
TABLE 19 NORTH AMERICAN ORGANIC BEVERAGE MARKET BY COUNTRY, THROUGH 2018 (\$ BILLIONS)	41
TABLE 20 NORTH AMERICAN ORGANIC BEVERAGE MARKET BY PRODUCTS, THROUGH 2018 (\$ BILLIONS)	41
TABLE 21 NORTH AMERICAN ORGANIC SUPPLEMENT MARKET BY COUNTRY, THROUGH 2018 (\$ MILLIONS)	42
TABLE 22 U.S. ORGANIC CROPS BY TYPE, THROUGH 2011 (THOUSAND ACRES)	43
TABLE 23 U.S. PER CAPITA ORGANIC CONSUMPTION, 2011-2018	43
TABLE 24 U.S. TOP BRANDS FOR ORGANIC PACKAGED FOODS, THROUGH 2012 (%)	45
TABLE 25 PENETRATION OF ORGANIC PACKAGED FOOD IN OVERALL PACKAGED FOOD U.S. MARKET, 2012-2018 (% OF TOTAL MARKET)	49
TABLE 26 PROJECTED U.S. AVERAGE PRICES FOR ORGANIC PACKAGED FOOD, 2009-2018 (\$/KILOGRAM)	50
TABLE 27 U.S. ORGANIC HOT DRINK MARKET BY PRODUCTS, THROUGH 2018 (\$ MILLIONS)	50
TABLE 28 PENETRATION OF ORGANIC HOT DRINKS IN OVERALL U.S. HOT DRINK MARKET, 2012-2018 (% OF TOTAL MARKET)	51

TABLE HEADING	PAGE NO.
TABLE 29 U.S. AVERAGE PRICES FOR ORGANIC HOT DRINKS, 2009-2014 (\$/KILOGRAM)	52
TABLE 30 U.S. ORGANIC JUICE MARKET BY TYPE, THROUGH 2018 (\$ MILLIONS)	53
TABLE 31 PENETRATION OF ORGANIC JUICE IN OVERALL U.S. JUICE MARKET, 2012-2018 (% OF TOTAL MARKET)	53
TABLE 32 U.S. AVERAGE PRICES FOR ORGANIC JUICE, 2009-2014 (\$/LITER)	53
TABLE 33 MEXICO PER CAPITA ORGANIC CONSUMPTION, 2011 AND 2018	55
TABLE 34 CANADA PER CAPITA ORGANIC CONSUMPTION, 2011 AND 2018	56
TABLE 35 TOP TEN ORGANIC PACKAGED GROCERIES IN CANADA BY PRODUCT, THROUGH 2018 (\$ MILLIONS)	57
TABLE 36 EUROPEAN ORGANIC CROPLAND DISTRIBUTION, 2011 (MILLION HECTARES)	59
TABLE 37 EUROPEAN ORGANIC FOOD AND BEVERAGE BY COUNTRY, THROUGH 2018 (\$ BILLIONS)	60
TABLE 38 PENETRATION OF ORGANIC FOODS AND BEVERAGES IN EUROPE, 2012-2018 (\$ BILLIONS)	61
TABLE 39 EUROPEAN ORGANIC FOOD AND BEVERAGE IMPORTS BY TYPE, THROUGH 2018 (\$ BILLIONS)	62
TABLE 40 EUROPEAN ORGANIC FOOD AND BEVERAGE IMPORTS BY COUNTRY, THROUGH 2018 (\$ BILLIONS)	62
TABLE 41 EUROPEAN ORGANIC FOOD AND BEVERAGE MARKET BY TYPE, THROUGH 2018 (\$ BILLIONS)	63
TABLE 42 EUROPEAN ORGANIC FOOD MARKET BY COUNTRY, THROUGH 2018 (\$ BILLIONS)	63
TABLE 43 EUROPEAN ORGANIC FOOD MARKET BY PRODUCTS, THROUGH 2018 (\$ BILLIONS)	64
TABLE 44 EUROPEAN ORGANIC BEVERAGE MARKET BY COUNTRY, THROUGH 2018 (\$ BILLIONS)	65
TABLE 45 EUROPE ORGANIC BEVERAGE MARKET BY PRODUCTS, THROUGH 2018 (\$ BILLIONS)	65
TABLE 46 EUROPEAN ORGANIC SUPPLEMENT MARKET BY COUNTRY, THROUGH 2018 (\$ MILLIONS)	66
TABLE 47 U.K. PER CAPITA ORGANIC CONSUMPTION, 2011 AND 2018	67
TABLE 48 GERMAN PER CAPITA ORGANIC CONSUMPTION, 2011-2018	68
TABLE 49 FRANCE PER CAPITA ORGANIC CONSUMPTION, 2011 AND 2018	70
TABLE 50 ITALY PER CAPITA ORGANIC CONSUMPTION, 2011 TO 2018	73
TABLE 51 ASIAN ORGANIC CROPLAND DISTRIBUTION, 2011 (MILLION HECTARES)	74
TABLE 52 ASIAN ORGANIC FOOD AND BEVERAGE MARKET BY COUNTRY, THROUGH 2018 (\$ BILLIONS)	75
TABLE 53 PENETRATION OF ORGANIC FOOD AND BEVERAGE IN ASIA, 2012-2018 (\$ BILLIONS/%)	76
TABLE 54 ASIAN ORGANIC FOOD AND BEVERAGE MARKET BY TYPE, THROUGH 2018 (\$ BILLIONS)	77
TABLE 55 ASIAN ORGANIC FOOD MARKET BY COUNTRY, THROUGH 2018 (\$ BILLIONS)	77
TABLE 56 ASIAN ORGANIC FOOD MARKET BY PRODUCTS, THROUGH 2018 (\$ BILLIONS)	78
TABLE 57 ASIAN ORGANIC BEVERAGE MARKET BY COUNTRY, THROUGH 2018 (\$ MILLIONS)	79
TABLE 58 ASIAN ORGANIC BEVERAGE MARKET BY PRODUCTS, THROUGH 2018 (\$ BILLIONS)	79

TABLE HEADING	PAGE NO.
TABLE 59 ASIA ORGANIC SUPPLEMENT MARKET BY COUNTRY, THROUGH 2018 (\$ MILLIONS)	80
TABLE 60 CHINESE PER CAPITA ORGANIC CONSUMPTION, 2011 AND 2018	81
TABLE 61 INDIAN PER CAPITA ORGANIC CONSUMPTION, 2011 AND 2018	82
TABLE 62 MAJOR ORGANIC FARMING PRODUCTS PRODUCED IN INDIA	82
TABLE 63 MAJOR PRODUCTS IMPORTED FROM THE U.S. TO JAPAN	84
TABLE 64 JAPANESE PER CAPITA ORGANIC CONSUMPTION, 2011 AND 2018	85
TABLE 65 ROW ORGANIC CROPLAND DISTRIBUTION, 2011 (MILLION HECTARES)	86
TABLE 66 ROW ORGANIC FOOD AND BEVERAGE MARKET BY COUNTRY, THROUGH 2018 (\$ MILLIONS)	87
TABLE 67 ROW ORGANIC FOOD AND BEVERAGE MARKET BY TYPE, THROUGH 2018 (\$ MILLIONS)	88
TABLE 68 MAJOR REGULATORY BODIES FOR ORGANIC FOODS AND BEVERAGES	90
TABLE 69 DRIVERS OF ORGANIC FOOD AND BEVERAGE MARKET, 2010-2018	95
TABLE 70 UNIFORMITY AND STRICTNESS OF ORGANIC STANDARDS, BY COUNTRY, 2012 AND 2018	99
TABLE 71 PER CAPITA INCOME IN MAJOR DEVELOPING COUNTRIES, 2008 AND 2012 (\$)	100
TABLE 72 NEW ORGANIC PRODUCT LAUNCHES, 2008-2013	111
TABLE 73 MERGERS AND ACQUISITIONS, 2008-2013	116
TABLE 74 PARTNERSHIPS, COLLABORATIONS, JOINT VENTURES AND AGREEMENTS, 2008-2012	119
TABLE 75 EXPANSIONS, 2008-2013	122
TABLE 76 ORGANIC FOOD AND BEVERAGE PATENT ANALYSIS, 2004-2013 (NUMBER OF PATENTS)	127
TABLE 77 ORGANIC FOOD AND BEVERAGE PATENT ANALYSIS, BY COMPANY, 2004-2013 (NUMBER/%)	127
TABLE 78 U.S. ORGANIC FOOD AND BEVERAGE PATENTS, 2008-2013	128
TABLE 79 EUROPEAN ORGANIC FOOD AND BEVERAGE PATENTS, 2009-2012	132
TABLE 80 JAPANESE ORGANIC FOOD AND BEVERAGE PATENTS, 2009-2012	134
TABLE 81 MARKET SHARE OF ORGANIC FOOD AND BEVERAGE COMPANIES, 2012 (\$ BILLIONS/%)	138
TABLE 82 LIST OF ACRONYMS	170

LIST OF FIGURES

FIGURE TITLE	PAGE NO.
SUMMARY FIGURE GLOBAL ORGANIC FOOD AND BEVERAGE MARKET BY REGION, 2012-2018 (\$ BILLIONS)	6
FIGURE 1 CONVENTIONAL AND ORGANIC FOOD COMPARISON (BUSHEL PER ACRE)	11
FIGURE 2 ORGANIC FOOD AND BEVERAGE SUPPLY CHAIN	12
FIGURE 3 ORGANIC FOOD AND BEVERAGE MARKET STRUCTURE	14
FIGURE 4 FRESH AND PROCESSED ORGANIC FOODS AND BEVERAGES, BY PRODUCT TYPE, 2012 (%)	15
FIGURE 5 U.S. PRICE TRENDS FOR ORGANIC AND CONVENTIONAL EGGS, 2005-2012 (\$/DOZEN)	26
FIGURE 6 GLOBAL ORGANIC FOOD AND BEVERAGE MARKET BY REGION, 2012 (%)	34
FIGURE 7 U.S. ORGANIC RETAIL SALES CHANNELS, 2012 (%)	44
FIGURE 8 U.S. ORGANIC MARKET BY PRODUCT, 2012 (%)	46
FIGURE 9 U.S. ORGANIC FOOD AND BEVERAGE IMPORTS, 2013 (%)	47
FIGURE 10 U.S. ORGANIC FRESH FRUIT AND VEGETABLE EXPORTS, 2013 (%)	48
FIGURE 11 ORGANIC MARKET BY PRODUCTS IN CANADA, 2012 (%)	56
FIGURE 12 TOP TEN CATEGORIES OF ORGANIC PRODUCTS PRODUCED IN CANADA (%)	58
FIGURE 13 U.K. ORGANIC FOOD AND BEVERAGE MARKET BY PRODUCTS, 2012 (%)	67
FIGURE 14 GERMAN ORGANIC FOOD AND BEVERAGE MARKET BY PRODUCTS, 2012 (%)	69
FIGURE 15 FRENCH ORGANIC FOOD AND BEVERAGE MARKET BY PRODUCTS, 2012 (%)	70
FIGURE 16 FRENCH ORGANIC MARKET BY RETAIL DISTRIBUTION, 2012 (%)	72
FIGURE 17 MAJOR ORGANIC PRODUCTS EXPORTED FROM INDIA (%)	83
FIGURE 18 CONSUMER PREFERENCE FOR ORGANIC FOODS AND BEVERAGES	96
FIGURE 19 SHIFT IN SALES CHANNELS FOR ORGANIC FOODS AND BEVERAGES, 2010 AND 2015 (%)	97
FIGURE 20 FACTORS FOR HIGH PRICES OF ORGANIC FOODS	101
FIGURE 21 PORTER'S FIVE FORCE ANALYSIS	104
FIGURE 22 GLOBAL ORGANIC FOOD AND BEVERAGE MARKET GROWTH STRATEGIES, 2008-2013 (%)	107
FIGURE 23 GLOBAL ORGANIC FOOD AND BEVERAGE GROWTH STRATEGIES, BY REGION, 2008-2013 (%)	108
FIGURE 24 GLOBAL ORGANIC FOOD AND BEVERAGE GROWTH STRATEGIES, ACTIVITY BY COMPANY, 2008-2013 (%)	109
FIGURE 25 ORGANIC FOOD AND BEVERAGE PATENT ANALYSIS, BY REGION, 2004-2013 (%)	126