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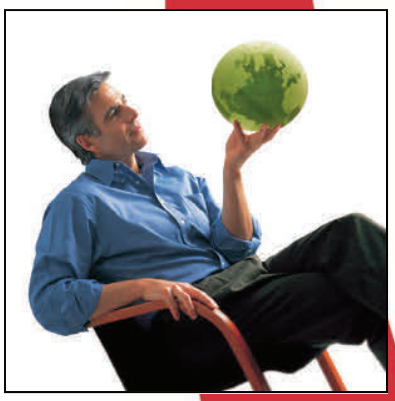
**International Markets Bureau**

**MARKET INDICATOR REPORT | APRIL 2012**

# Organic Packaged Food
## in Switzerland



***Source:*** *Mintel, 2012*

Growing Forward

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## EXECUTIVE SUMMARY

Switzerland is considered a global leader in organic farming and organic products, which have an established history dating back to the mid-1990's. As a result, organic foods have achieved a prominent role in the diets of the Swiss population, who have a reputation for being some of the most health-conscious consumers in the European market.

The growth of health and wellness products is aided by the Swiss government which has implemented promotional campaigns encouraging exercise and healthy eating. As Swiss consumers purchase more and more food products for their perceived health benefits, the value they place on such products continues to grow.

In 2010, Switzerland had a population of 7.8 million. Despite the relatively small size of this market, prospects for exporters remain. In 2010, the country's per capita gross domestic product (GDP) was US$67,751 (one of the highest in the world), while consumer spending per capita was US$39,539.

Moreover, Switzerland is internationally recognized for its economic stability, low unemployment rate and high standard of living. These characteristics are generally necessary for the successful entry of imported organic products, which are normally associated with higher prices.

Switzerland is unofficially divided into French, German and Italian cultural regions. This offers further opportunities for exporters whose organic products may appeal to consumers in one of the distinct cultural and linguistic areas.

## INSIDE THIS ISSUE



## MARKET TRENDS

Organic products have traditionally played an important role in the overall Swiss food sector. The significance of the organic food industry is supported by the Swiss consumers who conventionally follow a healthy lifestyle.

The organic packaged food sector grew by 7% in 2009, and then by 5% in 2010. The future of organic foods is expected to be strong, with the market forecast to reach US$493 million in 2015. Swiss consumers normally spend a considerable amount of their budget on food, which can be attributed to high expectations of food quality. In 2010, food retail sales in Switzerland reached a total value of US$44,014 million. Food sales alone constitute almost half of Switzerland's overall retail sales.

Domestically, there is a tendency for producers to market products labelled as "Swiss," which is received positively by consumers. Consumers in Switzerland are interested in supporting local producers, and believe that Swiss products, including organic foods, are likely to meet their expectations of quality.

While overall consumer demand for organic packaged food is widespread, it is unevenly distributed amongst women and men. A recent industry survey indicated that 78% of Swiss women are likely to purchase organic packaged food regularly, in comparison to 60% of men (Euromonitor, 2012). However, most Swiss consumers are also likely to purchase both organic and conventional packaged food products, rather than strictly adhere to one category over the other.

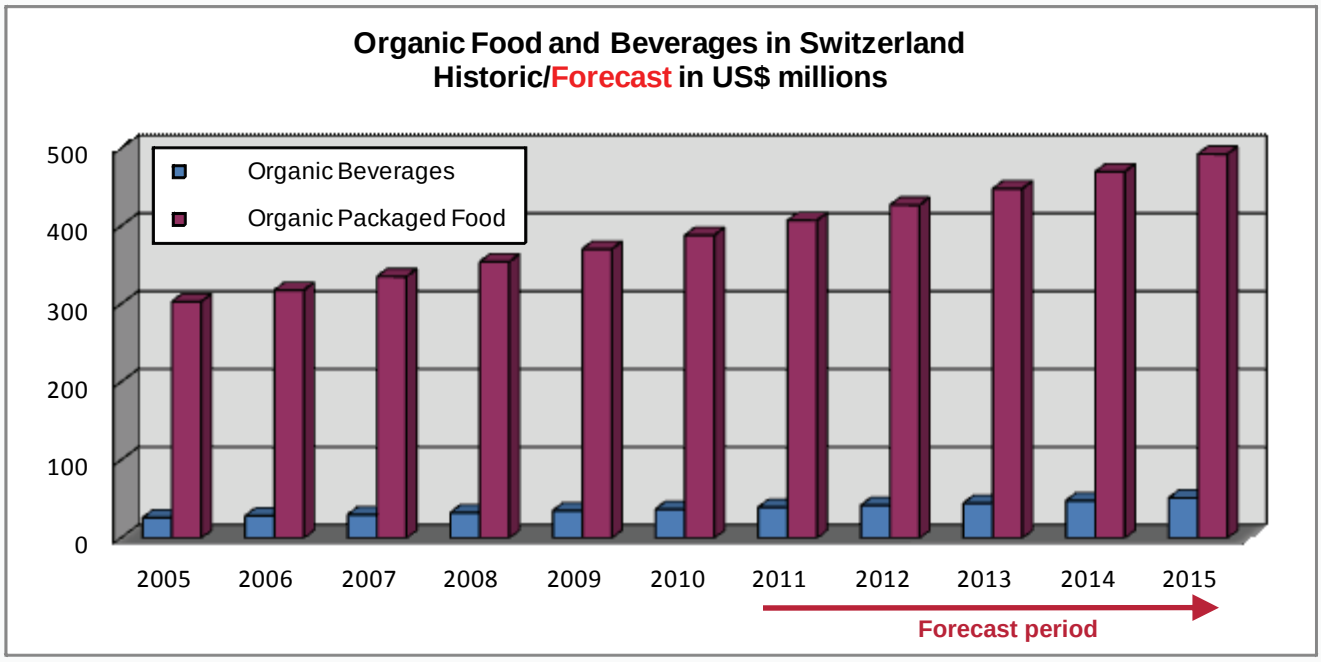
Although Swiss consumers are strong supporters of locally produced products and domestic retailers, the issue remains as to whether domestic producers will be able to keep up with the country's growing demand. In response, the Swiss government along with the Bio Suisse Federation, are increasing the allocation of land for organic farming and attempting to recruit more farmers willing to farm organically. Despite the country's domestic production capacity, the Swiss market for organic packaged food remains an opportunity for foreign producers due to the ever-increasing consumer demand in this well-established industry.

**Swiss Market Sizes of Organic and Regular Packaged Food – Historic/Forecast – Retail Sales Value in US$ millions**

| | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|---|---|---|
| Packaged food | 15, 695 | 16,487 | 16,501 | 16,649 | 16,813 | 17,057 | 17,333 | 17,621 | 17,908 |
| Organic packaged food | 336 | 354 | 371 | 389 | 408 | 427 | 448 | 470 | 493 |
| Organics as a % of total packaged food | 2.4 | 2.4 | 2.5 | 2.7 | 2.7 | 2.8 | 2.9 | 3.0 | 3.0 |

***Source**: Euromonitor, 2012*

## ORGANIC PACKAGED FOOD SALES




**Switzerland – Organic Packaged Food and Beverages Market Sizes – Historic/Forecast – Retail Sales Value in US$ millions**

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Organic Beverages | 26 | 29 | 30 | 33 | 35 | 37 | 40 | 42 | 45 | 48 | 52 |
| Organic Packaged Food | 303 | 318 | 336 | 354 | 371 | 389 | 408 | 427 | 448 | 470 | 493 |

**Switzerland – Sales of Organic Packaged Food by Subsector – Historic/Forecast – Value Growth in % Rate and US$ millions**

| Subsector | 2005-2010 CAGR* % | 2005-2010 Absolute (US$ millions) | 2011-2015 CAGR* % | 2011-2015 Absolute (US$ millions) |
|---|---|---|---|---|
| Organic Baby Food | 8.6 | 6.0 | 5.8 | 4.7 |
| Organic Bakery Products | 3.9 | 25.5 | 3.2 | 20.1 |
| Organic Confectionery | 3.3 | 2.9 | 4.9 | 4.2 |
| Organic Dairy Products | 2.2 | 10.4 | 3.5 | 15.2 |
| Organic Ice Cream | 9.9 | 2.7 | 5.3 | 1.8 |
| Organic Oils and Fats | 3.3 | 3.4 | 3.7 | 3.7 |
| Organic Ready Meals | 13.1 | 2.4 | 7.1 | 1.8 |
| Organic Rice | 6.4 | 0.1 | 6.9 | 0.1 |
| Organic Sauces, Dressings and Condiments | 17.0 | 3.1 | 12.8 | 4.0 |
| Organic Snack Bars | - | - | - | - |
| Organic Soup | 9.5 | 0.0 | 3.4 | 0.0 |
| Organic Spreads | 6.3 | 0.7 | 6.9 | 0.9 |
| Organic Sweet and Savoury Snacks | 6.4 | 0.8 | 7.2 | 1.0 |
| Other Organic Food | 13.3 | 27.3 | 9.2 | 27.8 |

**CAGR = compound annual growth rate*
***Source for all:*** *Euromonitor, 2012*

## ORGANIC PACKAGED FOOD SALES (continued)

**Switzerland Organic Packaged Food Market Sizes – Historic/ Forecast – Retail Sales in US$ millions**

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Total Organic Packaged Food** | **303.4** | **318.1** | **335.6** | **354.3** | **370.8** | **388.6** | **407.5** | **427.3** | **448.1** | **470.0** | **492.7** |
| **Organic Baby Food** | **11.6** | **13.1** | **14.6** | **16.0** | **16.8** | **17.5** | **18.4** | **19.3** | **20.4** | **21.7** | **23.1** |
| Organic Milk Formula | 7.2 | 8.3 | 9.3 | 10.3 | 11.2 | 11.8 | 12.5 | 13.3 | 14.2 | 15.2 | 16.4 |
| Organic Dried Baby Food | 1.4 | 1.5 | 1.5 | 1.6 | 1.6 | 1.6 | 1.7 | 1.7 | 1.8 | 1.9 | 2.0 |
| Other Organic Baby Food | 0.3 | 0.3 | 0.4 | 0.4 | 0.4 | 0.4 | 0.4 | 0.4 | 0.5 | 0.5 | 0.5 |
| Organic Prepared Baby Food | 2.6 | 3.0 | 3.4 | 3.8 | 3.7 | 3.8 | 3.8 | 3.9 | 4.0 | 4.1 | 4.2 |
| **Organic Bakery Products** | **121.5** | **125.8** | **131.4** | **137.3** | **141.9** | **146.9** | **152.0** | **157.0** | **162.1** | **167.1** | **172.1** |
| Organic Biscuits | 16.1 | 16.8 | 17.4 | 18.0 | 18.5 | 19.1 | 19.6 | 20.2 | 20.7 | 21.1 | 21.5 |
| Organic Bread | 98.6 | 101.7 | 106.1 | 110.7 | 114.3 | 118.1 | 121.9 | 125.6 | 129.3 | 132.9 | 136.4 |
| Organic Breakfast Cereals | 6.8 | 7.3 | 7.9 | 8.5 | 9.1 | 9.7 | 10.4 | 11.2 | 12.1 | 13.1 | 14.1 |
| **Organic Confectionery** | **16.2** | **16.6** | **17.3** | **18.0** | **18.6** | **19.2** | **19.9** | **20.7** | **21.7** | **22.8** | **24.1** |
| Organic Chocolate Confectionary | 13.2 | 13.5 | 14.0 | 14.7 | 15.2 | 15.7 | 16.3 | 17.1 | 17.9 | 18.9 | 20.1 |
| Organic Sugar Confectionery | 3.1 | 3.2 | 3.2 | 3.3 | 3.4 | 3.4 | 3.5 | 3.6 | 3.8 | 3.9 | 4.0 |
| **Organic Dairy Products** | **88.6** | **90.2** | **92.2** | **94.5** | **96.5** | **99.0** | **101.8** | **105.0** | **108.6** | **112.6** | **117.0** |
| Organic Cheese | 34.7 | 35.4 | 36.3 | 37.1 | 37.8 | 38.6 | 39.5 | 40.5 | 41.7 | 43.1 | 44.6 |
| Organic Cream | 3.4 | 3.5 | 3.5 | 3.6 | 3.6 | 3.6 | 3.6 | 3.5 | 3.5 | 3.5 | 3.4 |
| Organic Fromage Frais and Quark | 6.7 | 6.9 | 7.0 | 7.3 | 7.2 | 7.3 | 7.4 | 7.5 | 7.6 | 7.7 | 7.9 |
| **Organic Milk** | **43.9** | **44.4** | **45.4** | **46.6** | **47.9** | **49.6** | **51.4** | **53.4** | **55.7** | **58.3** | **61.1** |
| Organic Reduced Fat Milk | 8.5 | 8.6 | 8.7 | 8.9 | 9.1 | 9.4 | 9.7 | 10.0 | 10.4 | 10.9 | 11.4 |
| Organic Standard Milk | 35.3 | 35.8 | 36.7 | 37.7 | 38.8 | 40.2 | 41.7 | 43.4 | 45.3 | 47.4 | 49.7 |
| **Organic Ice Cream** | **4.5** | **5.0** | **5.6** | **6.2** | **6.7** | **7.2** | **7.7** | **8.2** | **8.7** | **9.1** | **9.5** |
| **Organic Oils and Fats** | **19.5** | **20.3** | **21.1** | **21.7** | **22.3** | **22.9** | **23.6** | **24.4** | **25.3** | **26.2** | **27.3** |
| Organic Butter | 12.1 | 12.3 | 12.5 | 12.6 | 12.6 | 12.7 | 12.9 | 13.0 | 13.1 | 13.3 | 13.5 |
| Organic Olive Oil | 6.0 | 6.6 | 7.2 | 7.7 | 8.1 | 8.7 | 9.3 | 9.9 | 10.6 | 11.4 | 12.2 |
| Organic Vegetable and Seed Oil | 1.4 | 1.4 | 1.4 | 1.5 | 1.5 | 1.5 | 1.5 | 1.5 | 1.5 | 1.5 | 1.6 |
| **Organic Ready Meals** | **2.8** | **3.3** | **3.8** | **4.3** | **4.7** | **5.2** | **5.7** | **6.1** | **6.6** | **7.1** | **7.4** |
| **Organic Rice** | **0.3** | **0.3** | **0.3** | **0.4** | **0.4** | **0.4** | **0.4** | **0.4** | **0.4** | **0.5** | **0.5** |
| **Organic Sauces, Dressings and Condiments** | **2.6** | **3.1** | **3.6** | **4.2** | **4.9** | **5.7** | **6.5** | **7.4** | **8.4** | **9.4** | **10.6** |
| **Organic Soup** | **0.0** | **0.0** | **0.0** | **0.0** | **0.0** | **0.1** | **0.1** | **0.1** | **0.1** | **0.1** | **0.1** |
| **Organic Spreads** | **1.9** | **2.1** | **2.2** | **2.4** | **2.5** | **2.6** | **2.8** | **3.0** | **3.2** | **3.4** | **3.7** |
| Organic Honey | 1.9 | 2.1 | 2.2 | 2.4 | 2.5 | 2.6 | 2.8 | 3.0 | 3.2 | 3.4 | 3.7 |
| **Organic Sweet and Savoury Snacks** | **2.1** | **2.2** | **2.4** | **2.5** | **2.7** | **2.9** | **3.1** | **3.3** | **3.5** | **3.8** | **4.0** |
| Organic Nuts | 2.1 | 2.2 | 2.4 | 2.5 | 2.7 | 2.9 | 3.1 | 3.3 | 3.5 | 3.8 | 4.0 |
| **Other Organic Food** | **31.7** | **36.0** | **41.1** | **46.8** | **52.8** | **59.0** | **65.6** | **72.3** | **79.2** | **86.3** | **93.4** |

***Source:*** *Euromonitor, 2012*

## KEY MARKET SEGMENTS

**Switzerland Organic Packaged Food Market Sizes – Historic/ Forecast – Retail Volume in '000 Tonnes (unless otherwise indicated)**

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Total Organic Packaged Food** | ***Not Calculable*** | | | | | | | | | | |
| **Organic Baby Food** | **0.9** | **1.0** | **1.0** | **1.0** | **1.0** | **1.0** | **1.0** | **1.1** | **1.1** | **1.1** | **1.2** |
| Organic Milk Formula | 0.2 | 0.2 | 0.2 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.4 |
| Organic Dried Baby Food | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 |
| Other Organic Baby Food | 0.6 | 0.6 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 |
| Organic Prepared Baby Food | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| **Organic Bakery Products** | **23.7** | **24.9** | **25.9** | **26.9** | **27.8** | **28.6** | **29.5** | **30.4** | **31.2** | **32.1** | **33.0** |
| Organic Biscuits | 0.7 | 0.7 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 | 0.9 | 0.9 | 0.9 | 0.9 |
| Organic Bread | 22.5 | 23.6 | 24.5 | 25.4 | 26.2 | 27.0 | 27.8 | 28.6 | 29.4 | 30.1 | 30.9 |
| Organic Breakfast Cereals | 0.6 | 0.6 | 0.7 | 0.7 | 0.8 | 0.8 | 0.9 | 0.9 | 1.0 | 1.1 | 1.2 |
| **Organic Confectionery** | **0.7** | **0.7** | **0.7** | **0.7** | **0.7** | **0.8** | **0.8** | **0.8** | **0.9** | **0.9** | **0.9** |
| Organic Chocolate Confectionary | 0.5 | 0.6 | 0.6 | 0.6 | 0.6 | 0.6 | 0.7 | 0.7 | 0.7 | 0.8 | 0.8 |
| Organic Sugar Confectionery | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 |
| **Organic Dairy Products** | ***Not Calculable*** | | | | | | | | | | |
| Organic Cheese | 2.3 | 2.3 | 2.4 | 2.4 | 2.5 | 2.5 | 2.6 | 2.7 | 2.8 | 2.9 | 3.0 |
| Organic Cream | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 |
| Organic Fromage Frais and Quark | 1.6 | 1.6 | 1.6 | 1.6 | 1.6 | 1.7 | 1.7 | 1.7 | 1.8 | 1.9 | 1.9 |
| **Organic Milk** | **24.1** | **24.7** | **25.5** | **26.4** | **27.4** | **28.6** | **30.0** | **31.5** | **33.2** | **35.1** | **37.1** |
| Organic Reduced Fat Milk | 4.6 | 4.6 | 4.7 | 4.8 | 4.9 | 5.1 | 5.3 | 5.5 | 5.7 | 6.0 | 6.3 |
| Organic Standard Milk | 19.5 | 20.1 | 20.8 | 21.6 | 22.5 | 23.6 | 24.7 | 26.0 | 27.5 | 29.1 | 30.8 |
| **Organic Ice Cream ('000 litres)** | **318.8** | **352.7** | **391.2** | **434.3** | **471.4** | **504.8** | **537.7** | **569.8** | **600.3** | **628.8** | **654.7** |
| **Organic Oils and Fats** | **1.3** | **1.3** | **1.3** | **1.4** | **1.4** | **1.4** | **1.5** | **1.5** | **1.5** | **1.6** | **1.6** |
| Organic Butter | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.7 | 0.8 | 0.8 | 0.8 | 0.8 | 0.8 |
| Organic Olive Oil | 0.3 | 0.3 | 0.4 | 0.4 | 0.4 | 0.4 | 0.4 | 0.5 | 0.5 | 0.5 | 0.5 |
| Organic Vegetable and Seed Oil | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 |
| **Organic Ready Meals** | **0.1** | **0.1** | **0.2** | **0.2** | **0.2** | **0.2** | **0.2** | **0.2** | **0.3** | **0.3** | **0.3** |
| **Organic Rice** | **0.0** | **0.0** | **0.0** | **0.0** | **0.1** | **0.1** | **0.1** | **0.1** | **0.1** | **0.1** | **0.1** |
| **Organic Sauces, Dressings and Condiments** | **0.3** | **0.4** | **0.4** | **0.5** | **0.6** | **0.7** | **0.8** | **0.9** | **1.0** | **1.1** | **1.2** |
| **Organic Soup** | **0.0** | **0.0** | **0.0** | **0.0** | **0.0** | **0.0** | **0.0** | **0.0** | **0.0** | **0.0** | **0.0** |
| **Organic Spreads** | **0.2** | **0.2** | **0.2** | **0.2** | **0.2** | **0.2** | **0.2** | **0.3** | **0.3** | **0.3** | **0.3** |
| Organic Honey | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.3 | 0.3 | 0.3 | 0.3 |
| **Organic Sweet and Savoury Snacks** | **0.2** | **0.2** | **0.2** | **0.2** | **0.2** | **0.2** | **0.2** | **0.3** | **0.3** | **0.3** | **0.3** |
| Organic Nuts | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.2 | 0.3 | 0.3 | 0.3 | 0.3 |
| **Other Organic Food** | **4.6** | **5.1** | **5.8** | **6.6** | **7.3** | **8.1** | **8.9** | **9.7** | **10.5** | **11.3** | **12.1** |

***Source:*** *Euromonitor, 2012*

**Switzerland – Per Capita Expenditure on Organic Packaged Food – Historic/Forecast – US$**

| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Organic Packaged Food | 40.9 | 42.6 | 44.8 | 47.0 | 49.1 | 51.2 | 53.5 | 55.9 | 58.4 | 61.0 | 63.7 |
| Organic Baby Food | 1.6 | 1.8 | 1.9 | 2.1 | 2.2 | 2.3 | 2.4 | 2.5 | 2.7 | 2.8 | 3.0 |
| Organic Bakery Products | 16.4 | 16.9 | 17.5 | 18.2 | 18.8 | 19.4 | 20.0 | 20.5 | 21.1 | 21.7 | 22.3 |
| Organic Confectionery | 2.2 | 2.2 | 2.3 | 2.4 | 2.5 | 2.5 | 2.6 | 2.7 | 2.8 | 3.0 | 3.1 |
| Organic Dairy Products | 12.0 | 12.1 | 12.3 | 12.5 | 12.8 | 13.0 | 13.4 | 13.7 | 14.1 | 14.6 | 15.1 |
| Organic Ice Cream | 0.6 | 0.7 | 0.7 | 0.8 | 0.9 | 1.0 | 1.0 | 1.1 | 1.1 | 1.2 | 1.2 |
| Organic Oils and Fats | 2.6 | 2.7 | 2.8 | 2.9 | 2.9 | 3.0 | 3.1 | 3.2 | 3.3 | 3.4 | 3.5 |
| Organic Ready Meals | 0.4 | 0.4 | 0.5 | 0.6 | 0.6 | 0.7 | 0.7 | 0.8 | 0.9 | 0.9 | 1.0 |
| Organic Rice | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 |
| Organic Sauces, Dressings and Condiments | 0.4 | 0.4 | 0.5 | 0.6 | 0.7 | 0.8 | 0.9 | 1.0 | 1.1 | 1.2 | 1.4 |
| Organic Soup | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Organic Spreads | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.3 | 0.4 | 0.4 | 0.4 | 0.4 | 0.5 |
| Organic Sweet and Savoury Snacks | 0.3 | 0.3 | 0.3 | 0.3 | 0.4 | 0.4 | 0.4 | 0.4 | 0.5 | 0.5 | 0.5 |
| Other Organic Food | 4.3 | 4.8 | 5.5 | 6.2 | 7.0 | 7.8 | 8.6 | 9.5 | 10.3 | 11.2 | 12.1 |

***Source:*** *Euromonitor, 2012*

**Switzerland – Year-on-Year Growth (%) of Organic Packaged Food, by Sub-Category**

| | 2009-10 | 2010-11 | 2011-12 | 2012-13 | 2013-14 | 2014-15 |
|---|---|---|---|---|---|---|
| Organic Baby Food | 4.1 | 4.9 | 5.2 | 5.6 | 6.1 | 6.5 |
| Organic Bakery Products | 3.5 | 3.5 | 3.3 | 3.2 | 3.1 | 3.0 |
| Organic Confectionery | 3.2 | 3.7 | 4.2 | 4.8 | 5.2 | 5.5 |
| Organic Dairy Products | 2.6 | 2.9 | 3.1 | 3.4 | 3.7 | 3.9 |
| Organic Ice Cream | 7.3 | 6.8 | 6.3 | 5.6 | 5.1 | 4.4 |
| Organic Oils and Fats | 2.9 | 3.1 | 3.4 | 3.6 | 3.8 | 4.0 |
| Organic Ready Meals | 9.8 | 9.1 | 8.3 | 7.6 | 7.0 | 5.5 |
| Organic Rice | 4.0 | 5.1 | 6.2 | 6.8 | 7.4 | 7.3 |
| Organic Sauces, Dressings and Condiments | 15.2 | 14.7 | 13.8 | 13.1 | 12.4 | 11.7 |
| Organic Soup | 5.8 | 5.2 | 4.2 | 3.7 | 3.2 | 2.6 |
| Organic Spreads | 6.0 | 6.4 | 6.7 | 6.6 | 7.2 | 7.3 |
| Organic Sweet and Savoury Snacks | 6.5 | 6.7 | 6.9 | 7.2 | 7.4 | 7.5 |
| Other Organic Food | 11.8 | 11.1 | 10.3 | 9.5 | 8.9 | 8.2 |

***Source:*** *Euromonitor, 2012*

## PRICING AND MARKET SHARES

**Switzerland – Retail Sales Price of Organic Packaged Food – Historic/Forecast – US$ per kg**

| | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|---|
| Organic Baby Food | 16.9 | 17.2 | 17.6 | 18.1 | 18.5 | 19.0 | 19.5 |
| Organic Bakery Products | 5.1 | 5.1 | 5.1 | 5.2 | 5.2 | 5.2 | 5.2 |
| Organic Confectionery | 25.2 | 25.3 | 25.3 | 25.4 | 25.4 | 25.5 | 25.5 |
| Organic Dairy Products | *Not calculable | | | | | | |
| Organic Ice Cream | 14.3 | 14.3 | 14.4 | 14.4 | 14.5 | 14.5 | 14.5 |
| Organic Oils and Fats | 16.0 | 16.1 | 16.2 | 16.2 | 16.3 | 16.5 | 16.6 |
| Organic Ready Meals | 25.1 | 25.2 | 25.3 | 25.4 | 25.5 | 25.6 | 25.7 |
| Organic Rice | 7.2 | 7.2 | 7.2 | 7.2 | 7.2 | 7.2 | 7.2 |
| Organic Sauces, Dressings and Condiments | 8.6 | 8.6 | 8.6 | 8.7 | 8.7 | 8.7 | 8.7 |
| Organic Soup | 6.3 | 6.3 | 6.3 | 6.2 | 6.2 | 6.2 | 6.2 |
| Organic Spreads | 11.6 | 11.6 | 11.6 | 11.6 | 11.6 | 11.6 | 11.7 |
| Organic Sweet and Savoury Snacks | 12.6 | 12.6 | 12.7 | 12.7 | 12.8 | 12.8 | 12.9 |
| Other Organic Food | 7.2 | 7.3 | 7.4 | 7.4 | 7.5 | 7.6 | 7.7 |

***Source**: Euromonitor, 2012*
***Note:** Unit prices for organic dairy products are not calculable, as they are not all measured in kilograms.*

The Swiss organic food market is well-established and continues to thrive. It continued to grow despite the 2008/2009 global recession, confirming the entrenched importance of this industry for Swiss consumers, who perceive organic foods as superior to products with artificial additives and preservatives.

Increased competition from German discounters Aldi and Lidl are causing the prices of organic foods to drop. Moreover, price declines in this market are likely to continue as trade increases between Switzerland and the European Union member states. However, prices are still unlikely to fall as low as some other European countries, such as Germany, due to the high import tariffs in Switzerland. More and more consumers are partaking in cross-border shopping, due to the high prices in Switzerland.

**Switzerland – Top 10 Brand Shares (by Global Brand Name) in the Organic Packaged Food Market – % Breakdown**

| Brand | Company name (GBO) | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|
| Naturaplan | Coop Genossenschaft | 34.5 | 34.1 | 32.2 | 32.0 |
| Bio Zwirbelbrot | Hiestand AG | 7.0 | 7.4 | 7.2 | 7.2 |
| Bischofszell Migros | Migros Genossenschaftsbund eG | 5.7 | 5.5 | 5.2 | 5.1 |
| M-Bio | Migros Genossenschaftsbund eG | 2.6 | 2.7 | 2.7 | 2.7 |
| Bio Kaese | Emmi AG | 2.4 | 2.3 | 2.2 | 2.1 |
| Morga | Morga AG | 1.9 | 1.8 | 1.8 | 1.9 |
| Migros Bio Engagement | Migros Genossenschaftsbund eG | 1.7 | 1.7 | 1.7 | 1.7 |
| Max Havelaar | Migros Genossenschaftsbund eG | 1.0 | 1.1 | 1.1 | 1.0 |
| Bio Kaese | Napfmilch AG | 1.1 | 1.1 | 1.0 | 1.0 |
| Bio | Bio-Familia AG | 1.0 | 1.0 | 1.0 | 0.9 |

***Source**: Euromonitor, 2012*

## ORGANIC BEVERAGES

As seen in the organic packaged food market as a whole, organic beverages remain a popular choice for Swiss consumers. During the recession, volume sales of organic beverages continued to increase despite rising consumer price-consciousness and a growing number of discount retailers. In 2010, the current value growth of the organic beverage category was 5%. Moreover, any losses or sluggish sales growth within the organic beverage sub-categories can be attributed to an increase of less expensive options, rather than consumers opting out of the market.

**Switzerland – Organic Hot Drinks Market Sizes – Historic/Forecast – Retail Value in US$ Millions and % Growth**

| | Retail Sales Value in US$ millions | | | | | Growth (%) | | |
|---|---|---|---|---|---|---|---|---|
| | 2008 | 2009 | 2010 | 2011 | 2015 | 2009-10 | 2010-11 | 2011-15 |
| **Organic Hot Drinks** | **21.3** | **23.3** | **24.7** | **26.2** | **34.4** | **5.7** | **6.3** | **31.2** |
| Organic Coffee | 18.3 | 20.2 | 21.3 | **22.7** | **30.1** | **5.8** | **6.5** | **32.3** |
| Organic Fresh Coffee | 16.2 | 18.1 | 19.2 | 20.5 | 27.5 | 6.2 | 6.9 | 34.1 |
| Organic Instant Coffee | 2.0 | 2.1 | 2.2 | 2.2 | 2.6 | 2.8 | 3.1 | 16.1 |
| Organic Tea | 3.0 | 3.2 | 3.3 | 3.5 | 4.3 | 4.5 | 4.8 | 23.5 |
| Organic Black Tea | 0.3 | 0.3 | 0.3 | 0.3 | 0.5 | 10.0 | 10.3 | 50.6 |
| Organic Fruit/Herbal Tea | 2.1 | 2.1 | 2.2 | 2.3 | 2.8 | 4.1 | 4.3 | 21.0 |
| Organic Green Tea | 0.7 | 0.7 | 0.8 | 0.8 | 1.0 | 3.7 | 4.0 | 19.4 |

**Switzerland – Unit Prices of Organic Hot Drinks by Sub-Category – Historic/Forecast – US$ per Kilogram – Based on Retail Sales**

| | 2009 | 2010 | 2011 | 2015 |
|---|---|---|---|---|
| Organic Coffee | 21.0 | 21.0 | 21.1 | 21.4 |
| Organic Fresh Coffee | 19.5 | 19.5 | 19.6 | 20.2 |
| Organic Instant Coffee | 62.0 | 62.2 | 62.2 | 62.4 |
| Organic Tea | 44.7 | 44.7 | 44.7 | 44.3 |
| Organic Black Tea | 29.5 | 29.6 | 29.7 | 30.0 |
| Organic Fruit/Herbal Tea | 39.8 | 39.9 | 40.0 | 40.1 |
| Organic Green Tea | 99.5 | 99.8 | 99.9 | 100.3 |
| Other Organic Hot Drinks | - | - | - | - |

**Switzerland – Retail Sales of Organic Hot Drinks by Sub-Category – Historic/Forecast – US$ Per Capita**

| | 2009 | 2010 | 2011 | 2015 |
|---|---|---|---|---|
| Organic Coffee | 2.7 | 2.8 | 3.0 | 3.9 |
| Organic Fresh Coffee | 2.4 | 2.5 | 2.7 | 3.6 |
| Organic Instant Coffee | 0.3 | 0.3 | 0.3 | 0.3 |
| Organic Tea | 0.4 | 0.4 | 0.5 | 0.6 |
| Organic Black Tea | 0.0 | 0.0 | 0.0 | 0.1 |
| Organic Fruit/Herbal Tea | 0.3 | 0.3 | 0.3 | 0.4 |
| Organic Green Tea | 0.1 | 0.1 | 0.1 | 0.1 |
| Other Organic Hot Drinks | - | - | - | - |

***Source for all:*** *Euromonitor, 2012*

In 2010, organic black tea experienced the highest current value growth in the organic hot drinks sector at 10%. This growth is attributed to media campaigns promoting the health benefits of black tea and is likely to continue into the future. Organic coffee also remains in high demand as the Swiss population generally prefers to drink coffee over tea. In 2010, organic coffee recorded value growth of 6%.

The major challenge that exists in this sub-sector is the growing popularity of Nespresso capsules and other machines providing consumers with high quality coffee and convenience. However, organic beverages will continue to post growth, due to their role in the health and wellness market.

**Switzerland – Organic Soft Drinks Market Sizes – Historic/Forecast – Retail Value in US$ Millions and % Growth**

| | Retail Sales Value in US$ millions | | | | | Growth (%) | | |
|---|---|---|---|---|---|---|---|---|
| | 2008 | 2009 | 2010 | 2011 | 2015 | 2009-10 | 2010-11 | 2011-15 |
| **Organic Soft Drinks** | **11.4** | **12.1** | **12.7** | **13.4** | **17.2** | **5.0** | **5.6** | **28.5** |
| Organic Concentrates | 1.1 | 1.1 | 1.2 | 1.3 | 1.6 | 5.8 | 5.3 | 29.6 |
| Organic Fruit/Vegetable Juice | 10.3 | 10.9 | 11.5 | 12.1 | 15.6 | 4.9 | 5.7 | 28.4 |
| Organic 100% Juice | 7.4 | 7.9 | 8.2 | 8.7 | 11.4 | 4.8 | 5.7 | 31.1 |
| Organic Nectars (25-99% Juice) | 2.9 | 3.1 | 3.2 | 3.4 | 4.1 | 5.2 | 5.6 | 21.5 |
| Organic Juice Drinks (up to 24% Juice) | - | - | - | - | - | - | - | - |

**Switzerland – Unit Prices of Organic Hot Drinks by Sub-Category – Historic/Forecast – US$ per Litre – Based on Retail Sales Price**

| | 2009 | 2010 | 2011 | 2015 |
|---|---|---|---|---|
| Organic Concentrates | 4.5 | 4.3 | 4.2 | 3.9 |
| Organic Fruit/Vegetable Juice | 3.8 | 3.8 | 3.8 | 4.0 |
| Organic 100% Juice | 5.1 | 5.2 | 5.2 | 5.3 |
| Organic Nectars (25-99% Juice) | 2.3 | 2.3 | 2.3 | 2.3 |
| Organic Juice Drinks (up to 24% Juice) | - | - | - | - |

**Switzerland – Retail Sales of Organic Soft Drinks by Sub-Category – Historic/Forecast – US$ Per Capita**

| | 2009 | 2010 | 2011 | 2015 |
|---|---|---|---|---|
| Organic Concentrates | 0.2 | 0.2 | 0.2 | 0.2 |
| Organic Fruit/Vegetable Juice | 1.4 | 1.5 | 1.6 | 2.0 |
| Organic 100% Juice | 1.0 | 1.1 | 1.1 | 1.5 |
| Organic Nectars (25-99% Juice) | 0.4 | 0.4 | 0.4 | 0.5 |
| Organic Juice Drinks (up to 24% Juice) | - | - | - | - |

***Source for all:*** *Euromonitor, 2012*

In 2010, organic soft drinks experienced a current value sales growth of 5%. In the same year, organic concentrates was the strongest-performing sub-category, with value growth of almost 6%. This growth can be attributed to consumers' willingness to pay a higher price for organic concentrates, considering the already low price of concentrates overall.

Growth for organic 100% juice is forecast to be strong at 6% from 2010-2015. Similar to organic concentrates, this increase is attributed to an expected decline in the prices of organic 100% juices, as retailers increase their selection. Lower prices and innovative products will further encourage consumers to make the switch from regular juice to organic options.

## DISTRIBUTION CHANNELS

The organic food market in Switzerland is dominated by two major grocery store chains, Coop and Migros, with value shares of 32% and 11% respectively. The dominance of Coop and Migros along with other discount chains, has made it difficult for small scale retailers to prosper in this market. Combined, Coop and Migros control approximately 80% of Switzerland's retail market and 65% of grocery banner sales. However, competition from German discounters Aldi and Lidl is increasing, causing the prices of organic foods to decline.

**Switzerland – Distribution of Organic Packaged Food**
**Retail Value RSP – % Breakdown**

| | 2008 | 2009 | 2010 |
|---|---|---|---|
| **Store-Based Retailing** | 86.3 | 86.4 | 86.5 |
| Supermarkets/Hypermarkets | 75.2 | 75.3 | 75.4 |
| Discounters | 4.0 | 4.0 | 4.1 |
| Small Grocery Retailers | 7.1 | 7.1 | 6.8 |
| Convenience Stores | 2.0 | 2.0 | 2.0 |
| Independent Small Grocers | 5.1 | 5.1 | 4.8 |
| Forecourt Retailers | - | - | - |
| Other store-based retailing | - | - | 0.2 |
| Other Grocery Retailers | - | - | 0.2 |
| Non-Grocery Retailers | - | - | - |
| **Non-Store Retailing** | 13.7 | 13.6 | 13.5 |
| Vending | 3.0 | 3.0 | 2.8 |
| Home Shopping | - | - | - |
| Internet Retailing | 10.0 | 10.0 | 10.1 |
| Direct Selling | 0.7 | 0.6 | 0.6 |
| **Total** | 100.0 | 100.0 | 100.0 |

***Source**: Euromonitor, 2012*

## CERTIFICATION

The Bio Suisse federation is a private organization in Switzerland that includes 32 organic farmers' associations, and the Research Institute of Organic Agriculture FiBL. The label assigned to organic foods is referred to as the "Bud," and products with this label represent approximately 60% of organic sales. More information can be found at the following link: http://www.bio-suisse.ch/en/home.php

Although Switzerland has regulations in place designed to certify different products as organic, exporters and distributors believe that obtaining the "Bud" classification is necessary for successful market sales, which could also apply to imported goods. It is also important for exporters to recognize that even the ingredients used in the final production of "Bud" labelled products, must also meet strict Bio Suisse requirements.

## PRICING SAMPLES

The following pricing samples were derived from Euromonitor International (2011).

| Brands | Company name | Outlets | Pack Size | Local Price (CHF) |
|---|---|---|---|---|
| **Organic Fresh Coffee** | | | | |
| Kaffee Engagement Max Havelaar | Migros Genossenschaftsbund eG | Supermarket/hypermarket | 500 g | 6.7 |
| Max Havelaar | Migros Genossenschaftsbund eG | Supermarket/hypermarket | 500 g | 6.7 |
| Max Havelaar Café Bio | Migros Genossenschaftsbund eG | Supermarket/hypermarket | 500 g | 6.7 |
| Max Havelaar Café Espresso Bio | Migros Genossenschaftsbund eG | Supermarket/hypermarket | 500 g | 6.7 |
| Naturaplan Café | Coop Genossenschaft | Supermarket/hypermarket | 500 g | 6.9 |
| **Organic Black Tea** | | | | |
| Coop Max Havelaar Ceylon Tea | Coop Schweiz | Supermarket/hypermarket | 50 bags | 2.6 |
| Coop Max Havelaar Finest Darjeeling Tea | Coop Schweiz | Supermarket/hypermarket | 100 g | 4.2 |
| M Bio Tee | Migros Genossenschaftsbund eG | Supermarket/hypermarket | 30 g | 2.4 |
| **Organic Fruit/Herbal Tea** | | | | |
| M Bio Tee | Migros Genossenschaftsbund eG | Internet retailing | 26 g | 2.6 |
| Twinings | Wander AG | Supermarket/hypermarket | 35 units | 3.4 |
| **Organic Green Tea** | | | | |
| M Bio Tee | Migros Genossenschaftsbund eG | Supermarket/hypermarket | 26 g | 2.6 |
| **Organic Concentrates** | | | | |
| Naturaplan Sirup Bio Holunderblüten | Laumann Co AG | Supermarket/hypermarket | 0.5 litres | 4.9 |
| Naturaplan Sirup Bio Orangenminze | Laumann Co AG | Supermarket/hypermarket | 0.5 litres | 4.9 |
| Naturaplan Sirup Bio Sanddorn | Laumann Co AG | Supermarket/hypermarket | 0.5 litres | 10.0 |
| Naturaplan Sirup Bio Zitronenmelisse | Laumann Co AG | Supermarket/hypermarket | 0.5 litres | 4.9 |
| Weight Watchers Sirup Himbeer | Laumann Co AG | Supermarket/hypermarket | 1 litres | 4.8 |
| **Organic 100% Juice** | | | | |
| Andros Blutorangensaft | Andros AG | Supermarket/hypermarket | 1 litres | 5.3 |
| Anna's Best Bio Blutorangensaft | Migros Genossenschaftsbund eG | Supermarket/hypermarket | 0.75 litres | 3.8 |
| Anna's Best Bio Orangensaft | Migros Genossenschaftsbund eG | Supermarket/hypermarket | 0.75 litres | 3.8 |
| Biotta Saft | Thurella AG | Internet retailing | 6 x 50 cl | 17.1 |
| Naturaplan Bio Birnensoft | Co op Schwiez | Supermarket/hypermarket | 6 x 1 litres | 14.4 |
| **Organic Soy Drinks** | | | | |
| Coop Naturaplan Bio Jogurt Cranberry Erd beere | Coop Schweiz AG | Supermarket/hypermarket | 2 x 150 g | 1.9 |
| Coop Naturaplan Bio Vollmilchjogurt Erd beer | Coop Schweiz AG | Supermarket/hypermarket | 2 x 180 g | 1.8 |
| Coop Naturaplan Jogurt Mango-Passionsfrucht | Coop Schweiz AG | Supermarket/hypermarket | 2 x 150 g | 1.9 |
| Coop Pro Montagna Bergjogurt Apfel-Birne | Coop Schweiz AG | Supermarket/hypermarket | 500 g | 2.7 |
| Coop Pro Montagna Bergjogurt Waldbeeren | Coop Schweiz AG | Supermarket/hypermarket | 500 g | 2.7 |
| **Organic Milk Formula** | | | | |
| Coop Naturaplan Bio Galactina Humana 3 | Coop Schweiz AG | Supermarket/hypermarket | 700 g | 23.5 |
| Coop Naturaplan Galactina Humana 2 | Coop Schweiz AG | Supermarket/hypermarket | 700 g | 23.5 |
| Coop Naturaplan Galctina Humana 1 | Coop Schweiz AG | Supermarket/hypermarket | 700 g | 23.5 |
| Hipp 1 | Hipp GmbH & Co Vertrieb KG | Internet retailing | 800 g | 21.3 |
| Hipp 2 | Hipp GmbH & Co Vertrieb KG | Supermarket/hypermarket | 800 g | 21.3 |
| **Organic Dried Baby Food** | | | | |
| Coop Naturaplan Bio Semoulette | Coop Schweiz SA | Supermarket/hypermarket | 400 g | 3.0 |
| Coop Naturaplan Galactina Bio Gemüse-Brei | Wander AG | Supermarket/hypermarket | 700 g | 11.2 |
| **Organic Prepared Baby Food** | | | | |
| Coop Naturaplan Galactina Bio Kalbfleisch-Kartoffeln | Wander AG | Supermarket/hypermarket | 130 g | 3.8 |
| Coop Naturaplan Galactina Bio Karotten-Kartoffeln Fe | Wander AG | Supermarket/hypermarket | 130 g | 2.0 |
| Coop Naturaplan Galactina Bio Schweizer Rindfleisch | Wander AG | Supermarket/hypermarket | 130 g | 3.8 |
| Coop Naturaplan Galactina Bio Zwieback mit Früchten | Wander AG | Supermarket/hypermarket | 130 g | 2.0 |

## PRICING SAMPLES (continued)

| Brand | Company name | Outlets | Pack size | Local Price (CHF) |
|---|---|---|---|---|
| **Other Organic Baby Food** | | | | |
| Hipp Baby Zwieback | Hipp AG | Supermarket/hypermarket | 100 g | 2.6 |
| **Organic Biscuits** | | | | |
| Coop Naturaplan Bio Cookies | Coop Schweiz AG | Supermarket/hypermarket | 225 g | 4.0 |
| Coop Naturaplan Bio Cookies Choco | Coop Schweiz AG | Supermarket/hypermarket | 225 g | 4.0 |
| Coop Naturaplan Bio Petit Beurre | Coop Schweiz AG | Supermarket/hypermarket | 170 g | 3.0 |
| Migros Bio | Migros Genossenschaftsbund eG | Internet retailing | 280 g | 3.8 |
| Natur Aktiv Bio Cookies | Aldi Suisse AG | Discounter | 200 g | 3.0 |
| **Organic Bread** | | | | |
| Coop Naturaplan Bio Ballast Knäckebrot | Coop Schweiz AG | Supermarket/hypermarket | 200 g | 3.1 |
| Coop Naturaplan Bio Leinsamen Knäckebrot | Coop Schweiz AG | Supermarket/hypermarket | 200 g | 3.1 |
| Natur Aktiv Bio Knäckebrot | Aldi Suisse AG | Discounter | 200 g | 1.8 |
| Natur Aktiv Bio Toastbrötchen | Aldi Suisse AG | Discounter | 260 g | 1.4 |
| Natur Aktiv Bio Vollkorn Toast | Aldi Suisse AG | Discounter | 500 g | 2.5 |
| **Organic Breakfast Cereals** | | | | |
| Bio Farm Haferflöckli | BIO FARM Genossenschaft | Internet retailing | 500 g | 4.6 |
| Coop Bio Naturaplan Cornflakes | Coop Schweiz AG | Supermarket/hypermarket | 250 g | 1.7 |
| Coop Naturaplan Bio 5-Korn-Flocken | Coop Schweiz | Supermarket/hypermarket | 500 g | 3.3 |
| Coop Naturaplan Bio Dinkelflocken | Coop Schweiz AG | Supermarket/hypermarket | 500 g | 3.7 |
| Coop Naturaplan Bio Hafernüssli | Coop Schweiz AG | Supermarket/hypermarket | 200 g | 2.5 |
| **Organic Cheese** | | | | |
| Coop Naturaplan Bio Mascarpone | Coop Schweiz AG | Supermarket/hypermarket | 225 g | 3.7 |
| Coop Naturaplan Bio Rahmtilsiter mild | Coop Schweiz AG | Supermarket/hypermarket | 220 g | 5.1 |
| Coop Naturaplan Bio Reblochon | Coop Schweiz AG | Supermarket/hypermarket | 150 g | 4.0 |
| Coop Naturaplan Brie Bio | Coop Schweiz AG | Supermarket/hypermarket | 180 g | 4.8 |
| Coop Pro Montagna Gstaader Bergkäse im Kräutermantel | Coop Schweiz AG | Supermarket/hypermarket | 220 g | 5.6 |
| **Organic Cream** | | | | |
| Coop Naturaplan Bio Halbrahm | Coop Schweiz AG | Supermarket/hypermarket | 200 ml | 2.3 |
| Coop Naturaplan Bio Vollrahm | Coop Schweiz AG | Supermarket/hypermarket | 200 ml | 2.9 |
| **Organic Fromage Frais and Quark** | | | | |
| Coop Naturaplan Bio Cottage Cheese nature | Coop Schweiz AG | Supermarket/hypermarket | 200 g | 2.3 |
| Coop Naturaplan Bio Halbfett-Quark nature | Coop Schweiz AG | Supermarket/hypermarket | 250 g | 1.9 |
| Migros Engagement Bio Magerquark | Migros Genossenschaftsbund eG | Supermarket/hypermarket | 200 g | 1.2 |
| **Organic Reduced Fat Milk** | | | | |
| Coop Naturaplan Bio Drink Teilentrahmte Milch Past 27% | Coop Schweiz AG | Supermarket/hypermarket | 1 litres | 1.7 |
| Coop Naturaplan Bio Drink Teilentrahmte Milch UHT (27%) | Coop Schweiz AG | Supermarket/hypermarket | 1 litres | 1.8 |
| Coop Naturaplan Bio Magermilch UHT (01%) | Coop Schweiz AG | Supermarket/hypermarket | 1 litres | 1.6 |
| **Organic Standard Milk** | | | | |
| Coop Naturaplan Bio Vollmilch UHT (39%) | Coop Schweiz AG | Supermarket/hypermarket | 1 litres | 1.8 |
| Coop Nauraplan Bio Regio Züribiet Vollmilch | Coop Schweiz | Supermarket/hypermarket | 1 litres | 1.9 |
| Coop Nauraplan Bio Vollmilch | Coop Schweiz | Supermarket/hypermarket | 1 litres | 1.7 |
| Migros Engagement Bio Vollmilch UHT (39%) | Migros Genossenschaftsbund eG | Supermarket/hypermarket | 4 x 1 litres | 6.8 |
| Natur Aktiv Bio Vollmilch | Aldi Suisse AG | Discounter | 1 litres | 1.7 |
| **Organic Sour Milk Drinks** | | | | |
| Coop Naturaplan Bio Saure Buttermilch Nature | Coop Schweiz AG | Supermarket/hypermarket | 500 ml | 1.0 |
| **Organic Soy Milk** | | | | |
| Coop Naturaplan Bio Sojadrink Nature | Coop Schweiz AG | Supermarket/hypermarket | 1 litres | 2.2 |
| Migros Engagement Bio Soja Line Drink | Migros Genossenschaftsbund eG | Supermarket/hypermarket | 1 litres | 1.8 |

## PRICING SAMPLES (continued)

| Brand | Company name | Outlets | Pack size | Local Price (CHF) |
|---|---|---|---|---|
| **Organic Soy-Based Yogurt** | | | | |
| Coop Naturaplan Bio Jogurt Bifidus | Coop Schweiz AG | Supermarket/hypermarket | 4 x 125 g | 3.2 |
| Coop Naturaplan Bio Schafmilchjogurt | Coop Schweiz AG | Supermarket/hypermarket | 120 g | 1.4 |
| Coop Pro Montagna Bündner Bergjogurt Nature | Coop Schweiz AG | Supermarket/hypermarket | 140 g | 0.9 |
| Coop Pro Montagna Graubünden Jogurt Nature | Coop Schweiz AG | Supermarket/hypermarket | 500 g | 2.4 |
| Coop Weight Watchers Drinkjogurt Mocca | Coop Schweiz AG | Supermarket/hypermarket | 500 ml | 1.7 |
| **Other Organic Yogurt** | | | | |
| Coop Naturaplan Bio Bifidus Jogurt Mokka | Coop Schweiz AG | Supermarket/hypermarket | 2 x 125 g | 1.8 |
| Coop Naturaplan Bio Bifidus Jogurt Nature | Coop Schweiz AG | Supermarket/hypermarket | 500 g | 1.8 |
| Edelweiss Biologic Cappuccino | EDELWEISS GMBH & CO KG | Internet retailing | 4 x 125 g | 4.5 |
| **Organic Ice Cream** | | | | |
| Coop Naturaplan Bio Glace Chocolat | Coop Schwiez AG | Supermarket/hypermarket | 460 ml | 4.9 |
| Coop Naturaplan Bio Glace Johgurt Heidelbeer | Coop Schweiz AG | Supermarket/hypermarket | 460 ml | 4.9 |
| Coop Naturaplan Bio Glace Johgurt mit Zwetschgen sauce | Coop Schweiz AG | Supermarket/hypermarket | 460 ml | 4.9 |
| Coop Naturaplan Bio Glace Vanille | Coop Schwiez AG | Supermarket/hypermarket | 460 ml | 4.9 |
| **Organic Butter** | | | | |
| Coop Naturaplan Bio Butter | Coop Schweiz AG | Supermarket/hypermarket | 200 g | 3.8 |
| Coop Naturaplan Bio Jogurt-Butter | Coop Schweiz AG | Supermarket/hypermarket | 200 g | 4.1 |
| Cremo Bio Butter | Crémo SA | Internet retailing | 200 g | 4.6 |
| Natur Aktiv Bio Butter | Aldi Suisse AG | Discounter | 100 g | 1.9 |
| **Organic Olive Oil** | | | | |
| Coop Naturaplan Bio Italienisches Olivenöl | Coop Schweiz AG | Supermarket/hypermarket | 0.5 litres | 10.2 |
| Coop Naturaplan Bio Olivenöl Aus Spanien | Coop Schweiz AG | Supermarket/hypermarket | 0.5 litres | 11.3 |
| Migros Engagement Italienisches Olivenöl | Migros Genossenschaftsbund eG | Supermarket/hypermarket | 0.5 litres | 10.2 |
| Migros Globus Olivenöl Extravergine | Migros Genossenschaftsbund eG | Internet retailing | 0.5 litres | 24.8 |
| Natur Aktiv Bio Olivenöl | Aldi Suisse AG | Discounter | 750 ml | 11.0 |
| **Organic Vegetable and Seed Oil** | | | | |
| Coop Naturaplan Bio Sonnenblumenöl | Coop Schweiz AG | Supermarket/hypermarket | 0.5 litres | 5.7 |
| **Organic Ready Meals** | | | | |
| Coop Naturaplan Betty Bossi Bio Pizza del Padrone | Coop Schweiz AG | Supermarket/hypermarket | 350 g | 8.0 |
| Coop Naturaplan Bio Gartensalat | Coop Schweiz AG | Supermarket/hypermarket | 200 g | 3.3 |
| Coop Naturaplan Bio Nüsslisalat | Coop Schweiz AG | Supermarket/hypermarket | 100 g | 5.0 |
| Coop Naturaplan Bio Ravioli alla Napoletana | Coop Schweiz AG | Supermarket/hypermarket | 880 g | 5.2 |
| **Organic Rice** | | | | |
| Coop Naturaplan Bio Vollreis | Coop Schweiz AG | Supermarket/hypermarket | 1 kg | 2.8 |
| Rapunzel Riz Bio | Rapunzel Naturkost AG | Internet retailing | 600 g | 6.0 |
| **Organic Sauses, Dressings and Condiments** | | | | |
| Coop Naturaplan - Bio Ketchup | Coop Schweiz AG | Supermarket/hypermarket | 540 g | 4.2 |
| Coop Naturaplan - Bio Senf | Coop Schweiz | Supermarket/hypermarket | 200 g | 1.7 |
| Coop Naturaplan Bio Apfelessig | Coop Schweiz | Supermarket/hypermarket | 500 ml | 2.5 |
| Coop Naturaplan Bio Bouillon Gemüse | Coop Schweiz AG | Supermarket/hypermarket | 250 g | 5.8 |
| Coop Naturaplan Bio Gewürzmischung Pizza | Coop Schweiz AG | Supermarket/hypermarket | 60 g | 2.9 |
| **Organic Honey** | | | | |
| Natur Aktiv Bio Honig | Aldi Suisse AG | Discounter | 500 g | 5.0 |
| **Other Organic Non-Honey Spreads** | | | | |
| Coop Naturaplan Bio Konfitüre extra Aprikose | Coop Schweiz AG | Supermarket/hypermarket | 235 g | 3.0 |
| Natur Aktiv Bio Konfitüre | Aldi Suisse AG | Discounter | 340 g | 2.0 |
| **Organic Fruit Snacks** | | | | |
| Coop Naturaplan Bio Rosinen | Coop Schweiz | Supermarket/hypermarket | 200 g | 1.7 |
| Coop Naturaplan Bio Sultaninen | Coop Schweiz AG | Supermarket/hypermarket | 200 g | 1.4 |
| **Organic Nuts** | | | | |
| Natur Aktiv Bio Nussmix | Aldi Suisse AG | Discounter | 250 g | 5.0 |
| **Other Organic Sweet and Savoury Snacks** | | | | |
| Coop Naturaplan Bio Chips Nature | Zweifel Chips & Snacks Holding | Supermarket/hypermarket | 140 g | 3.8 |
| Coop Naturaplan Bio Chips Paprika | Zweifel Chips & Snacks Holding | Supermarket/hypermarket | 125 g | 3.8 |

## FOR MORE INFORMATION

For more information on organic products and labelling standards, please consult the following publications from Agriculture and Agri-Food Canada, or any of the resources listed below:

- Market Trends: Organics
  *November 2010*

- Food Labels in Europe: Changes to E.U. Labelling Regulations and New Eco-Labels in France
  *September 2010*

- Market Briefing: Food Information and Labelling in the European Union
  *September 2011*

| Key Resources on Organic Standards, Regulations, and Labelling | |
|---|---|
| **Switzerland** | **Bio Suisse**<br>http://www.bio-suisse.ch/ |
| **European Union** | **The regulations surrounding food labelling in the E.U. are currently under review, and may be subject to further amendments. For more detailed information, or the latest updates, please consult the following resources:*<br><br>**The European Commission**<br>http://ec.europa.eu/food/food/labellingnutrition/nutritionlabel/index_en.htm<br><br>**The European Food Information Council**<br>http://www.eufic.org/article/en/health-and-lifestyle/food-choice/artid/Nutrition-labelling-how-where-and-why/ |
| **Canada** | **Canadian Food Inspection Agency, Organic Product Regulations**<br>http://www.inspection.gc.ca/english/fssa/orgbio/orgbioe.shtml |
| **International** | **International Taskforce on Harmonization and Equivalence in Organic Agriculture**<br>http://www.itf-organic.org/<br><br>**International Federation of Organic Agriculture Movements**<br>http://www.ifoam.org/about_ifoam/standards/index.html |

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