

**The Italian market for organic food**  
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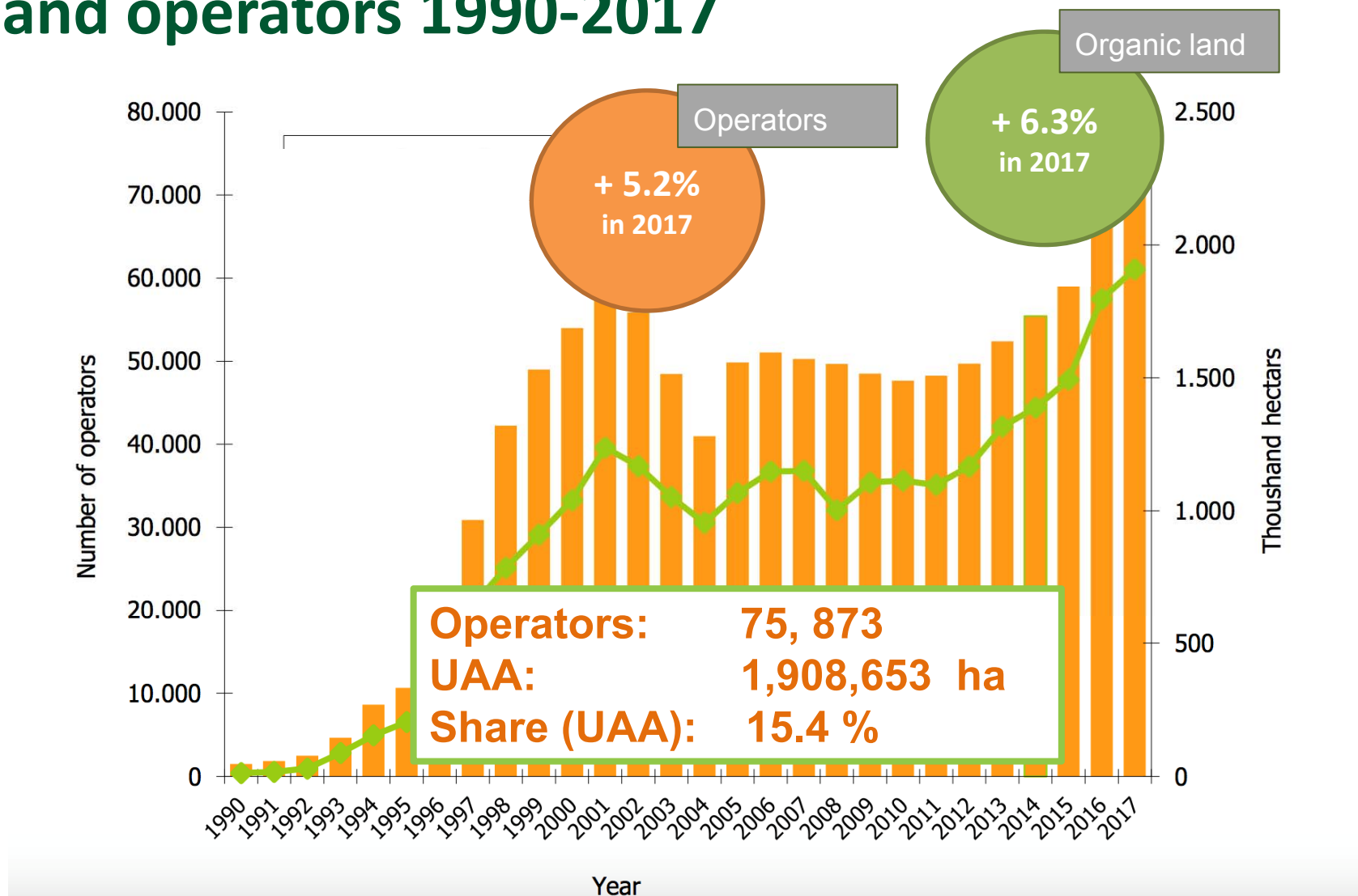


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# Development of organic agricultural land and operators 1990-2017



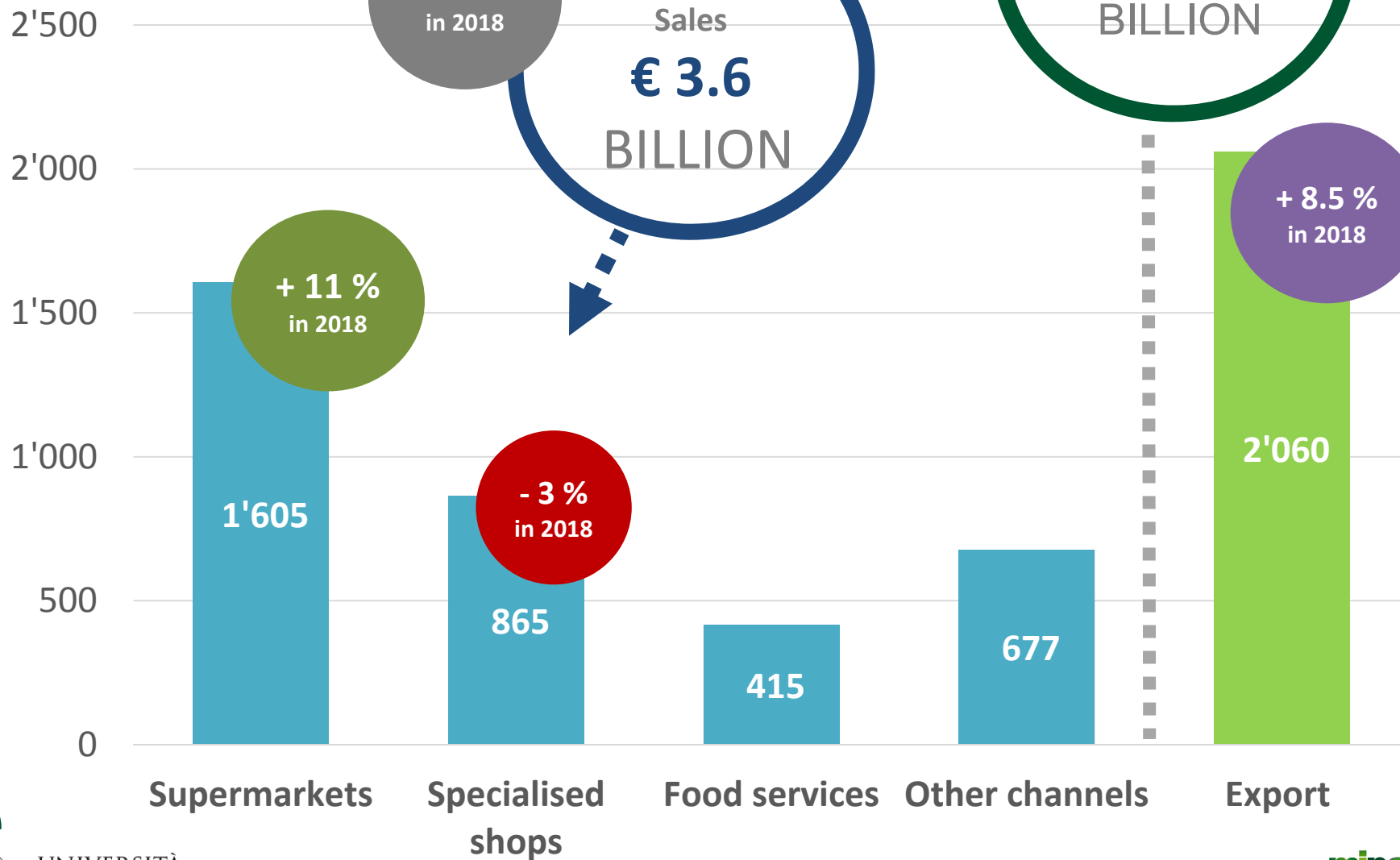
**Operators: 75, 873**  
**UAA: 1,908,653 ha**  
**Share (UAA): 15.4 %**

Source: Sinab, 2018

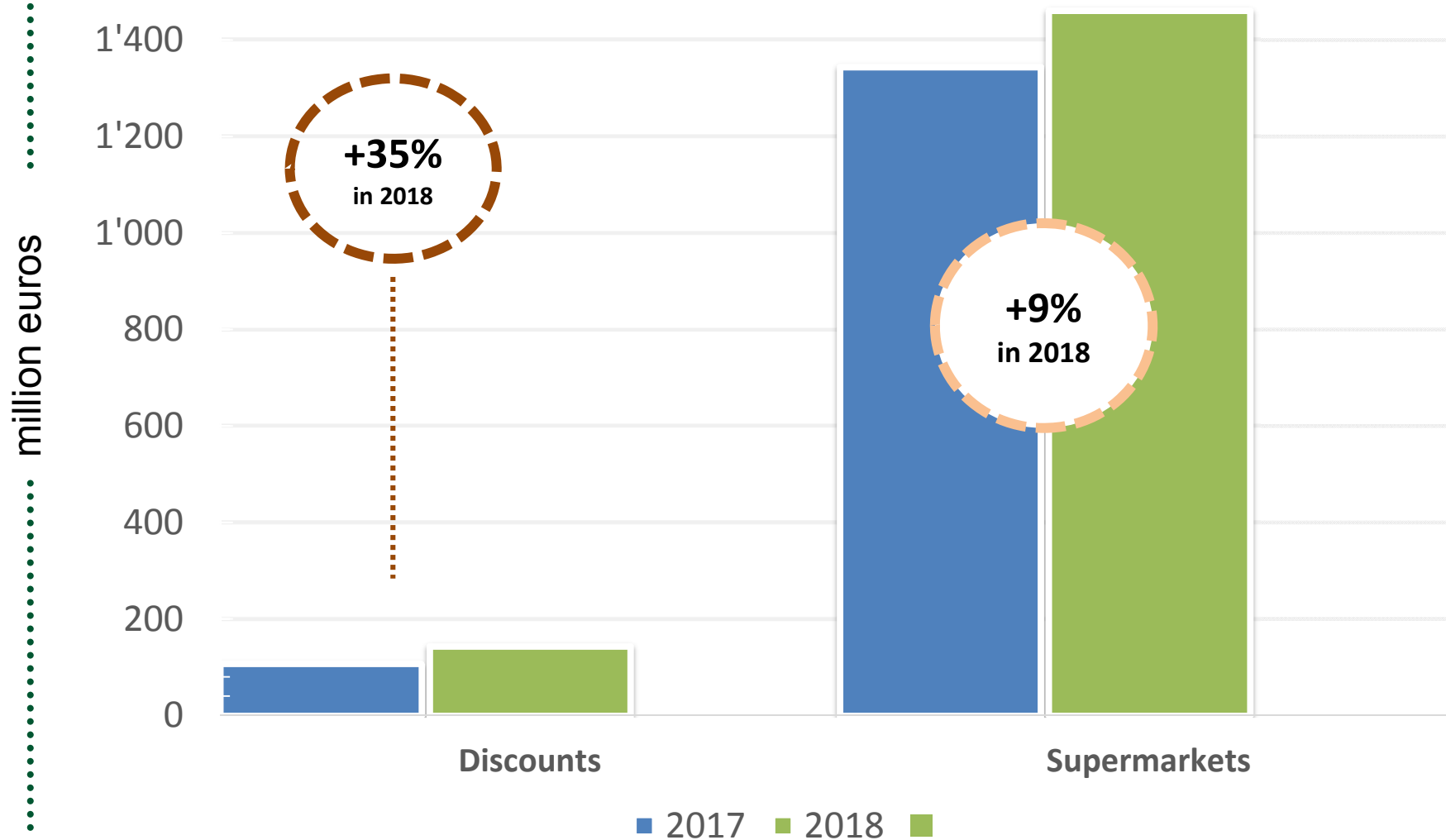


# Organic market - 2018

million euros



# Sales of organic food in Supermarkets and Discounts



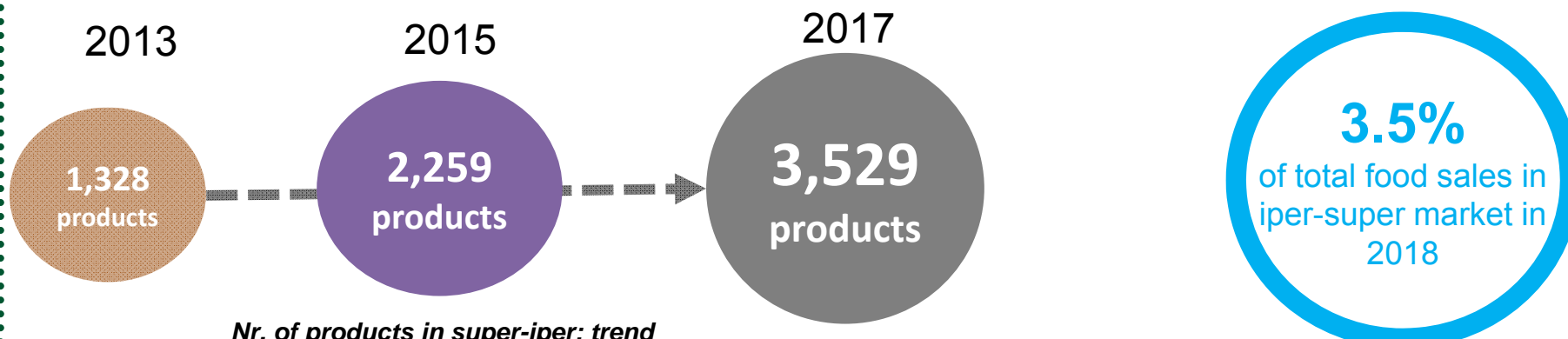
Own elaboration based on AssoBio and Nomisma, 2018



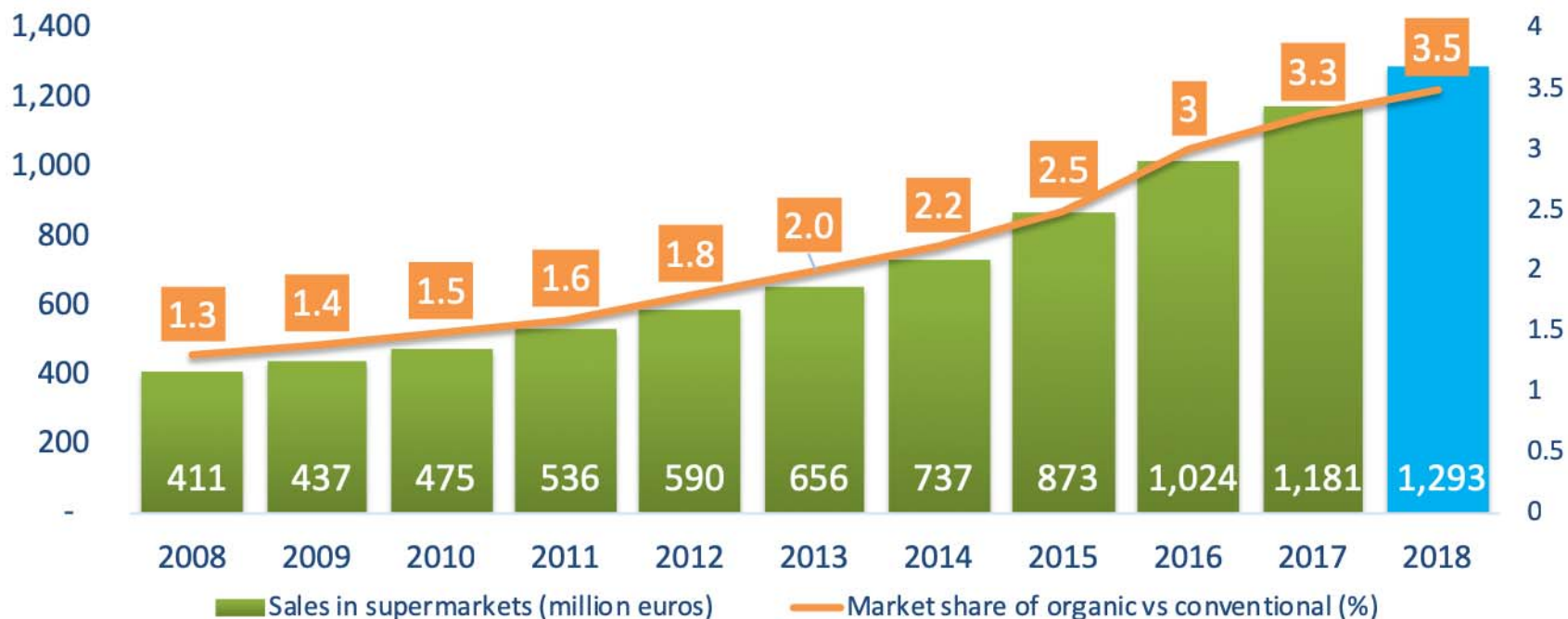
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# Sales of organic foods in supermarkets



Nr. of products in super-iper: trend



Source: Nomisma/Assobio, 2018



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# Private market labels represent 45% of total sales of organic products in supermarkets




# Sales of organic foods in specialised shops

60% (910 out of 1.437)  
in retail chains



8 retail chains have their own  
“private market label”

 <b>BIO C' BON</b> - 16	 <b>BIOBOTTEGA</b> BIOBOTTEGA - 28	 <b>BIOSAPORI</b> - 10
 <b>CUOREBIO</b> - 228	 <b>KI AMA BIO</b> - 300	 <b>MELAVERDEBIO</b> - 12
 <b>NATURASÌ</b> - 245	 <b>NATURPLUS</b> - 20	 <b>PIACERE TERRA</b> - 15

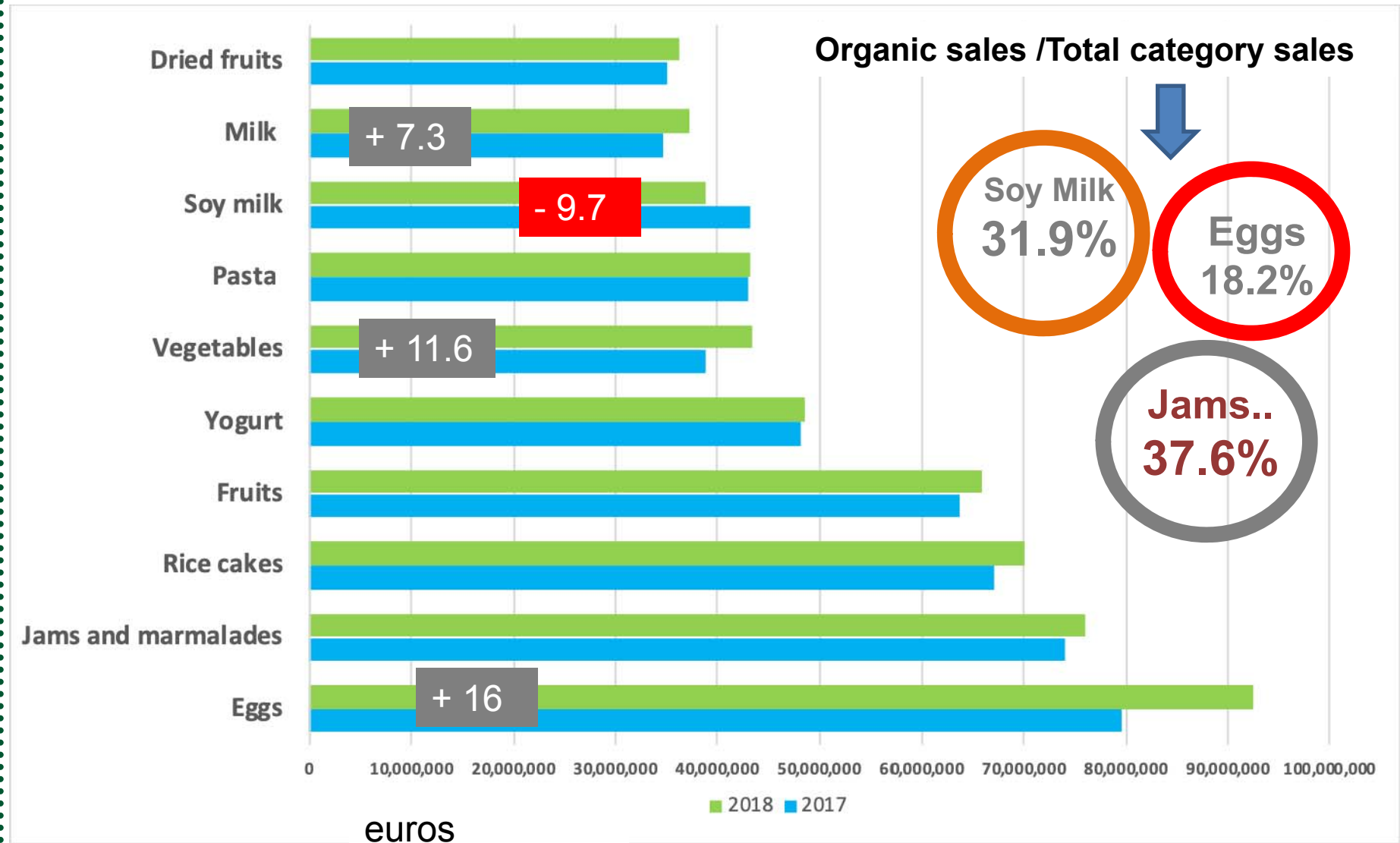


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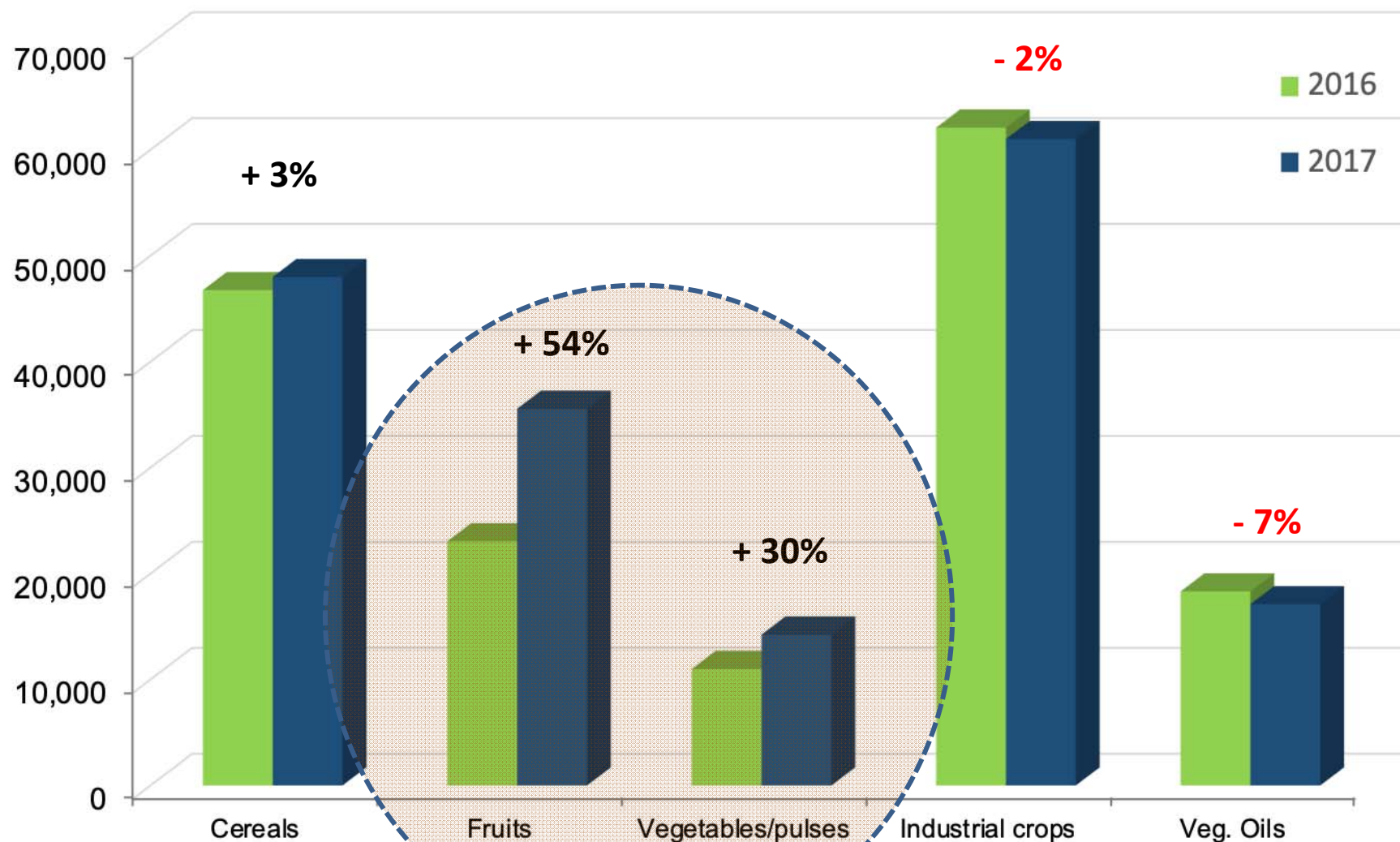
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# Supermarkets sales (top 10 products)





# Organic Import by product (2016 - 2017)



Source: Sinab, 2018



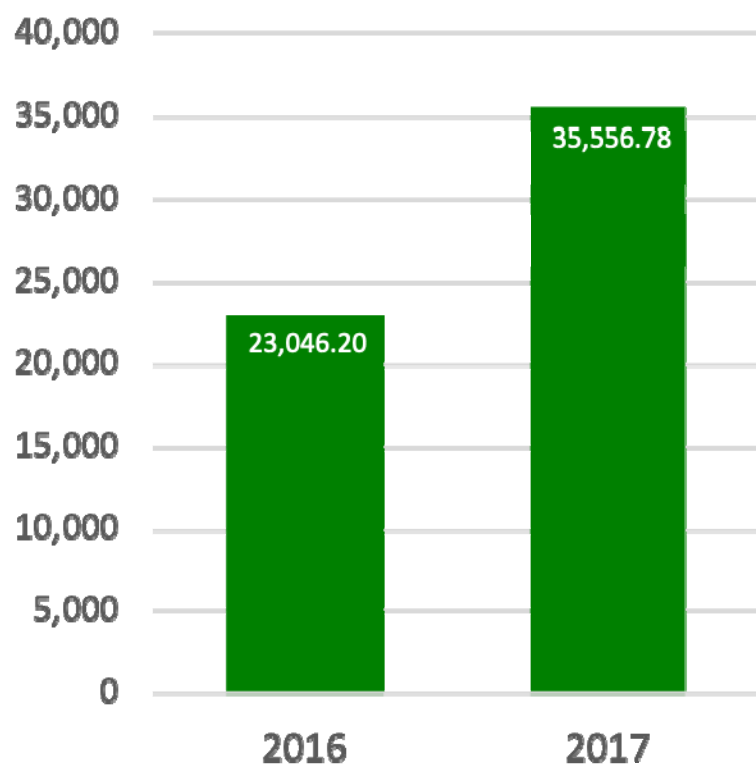
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# Fruit

## Import from third countries (tonnes)

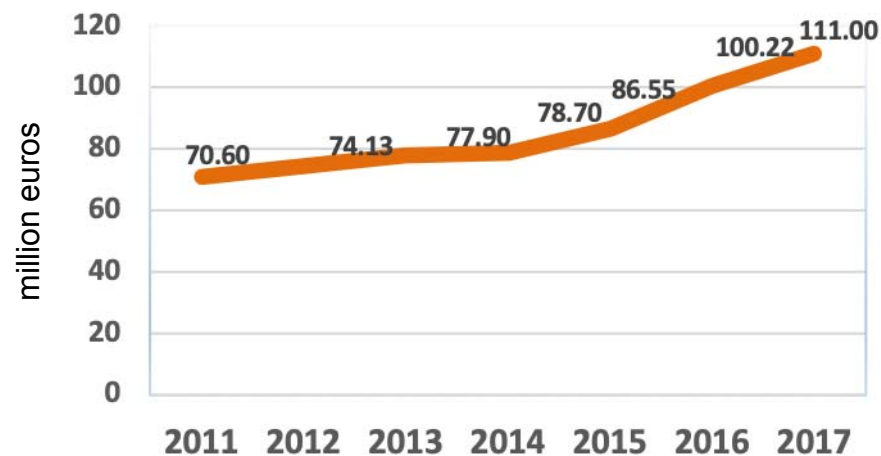


Source: Sinab, 2018

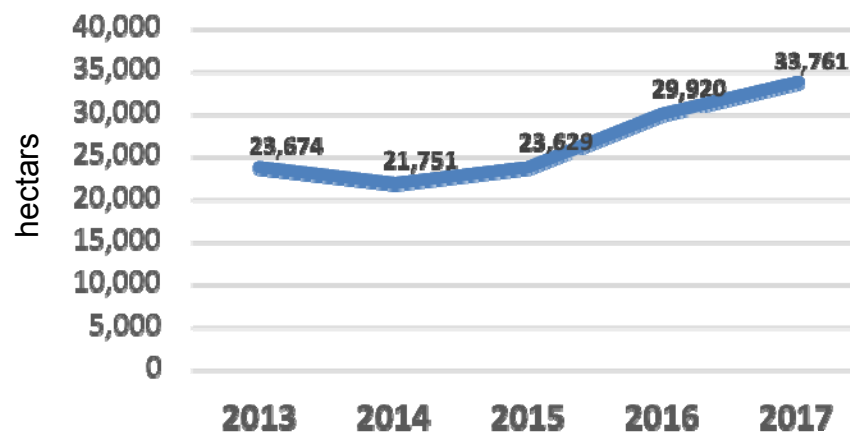


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## Sales of organic fruit in supermarkets



## Trend of organic fruit production



Source: Sinab, 2016



# Conclusion

- In 2017, sales of organic product in supermarkets **rose by 8%**, while specialised shops sales **decreased of about 3%**.
- The Italian organic market structure is gradually changing, with **supermarkets and discounts increasing their market sharee**. The few established organic brands are loosing equity with respect to private labels.
- **Organic land grew at a lower rate than in the past** two years and for some categories (fruit, veg and cereals) the domestic market heavily relies on imports. At the same time, sales of fresh organic fruit and vegetables sales grew by 11.5%.



# Thank you!

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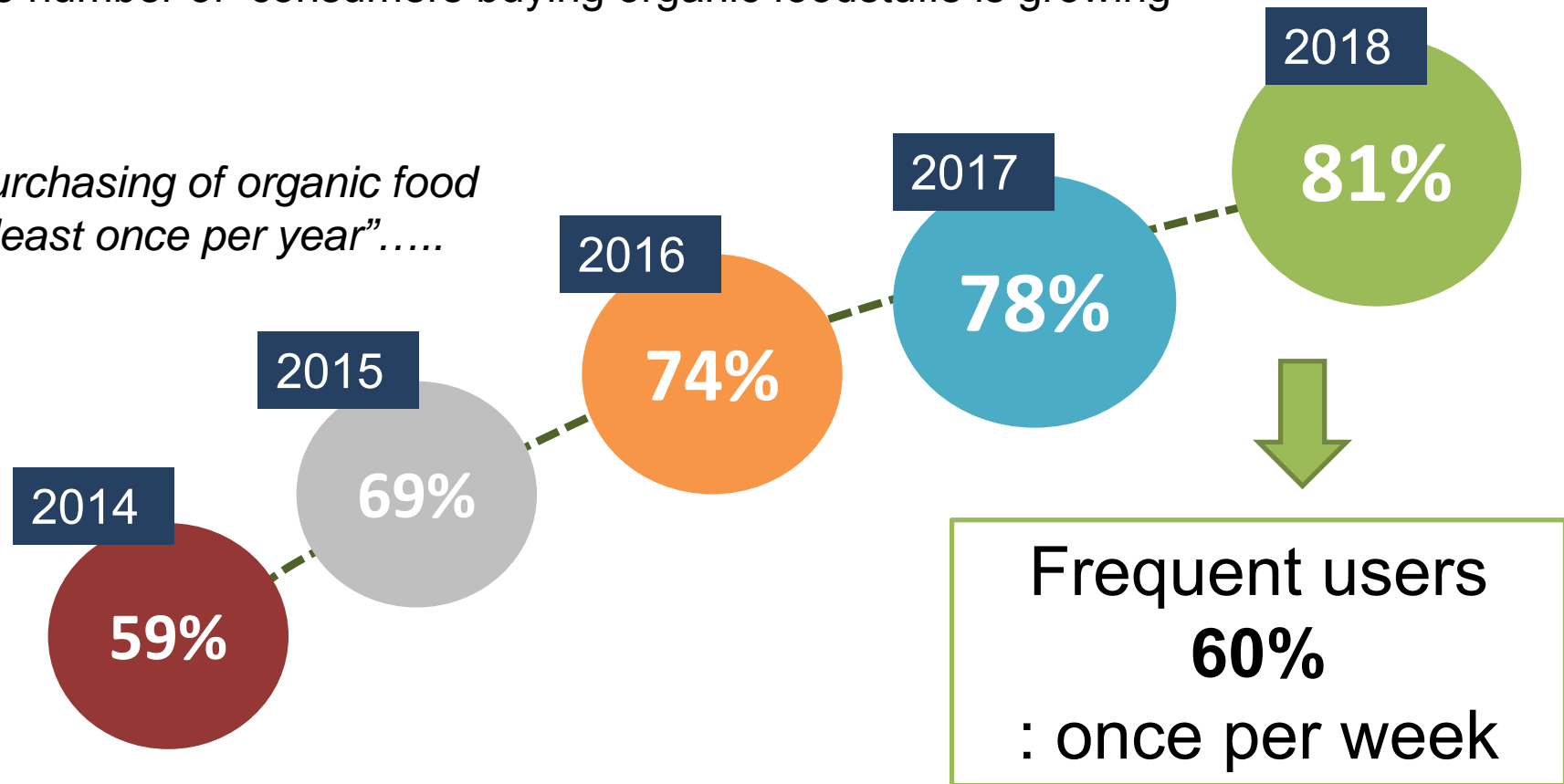
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# Consumption habits

The number of consumers buying organic foodstuffs is growing

*“Purchasing of organic food at least once per year”.....*



Nomisma Consumer Survey, 2017  
850 consumers, responsible for their household food purchases.



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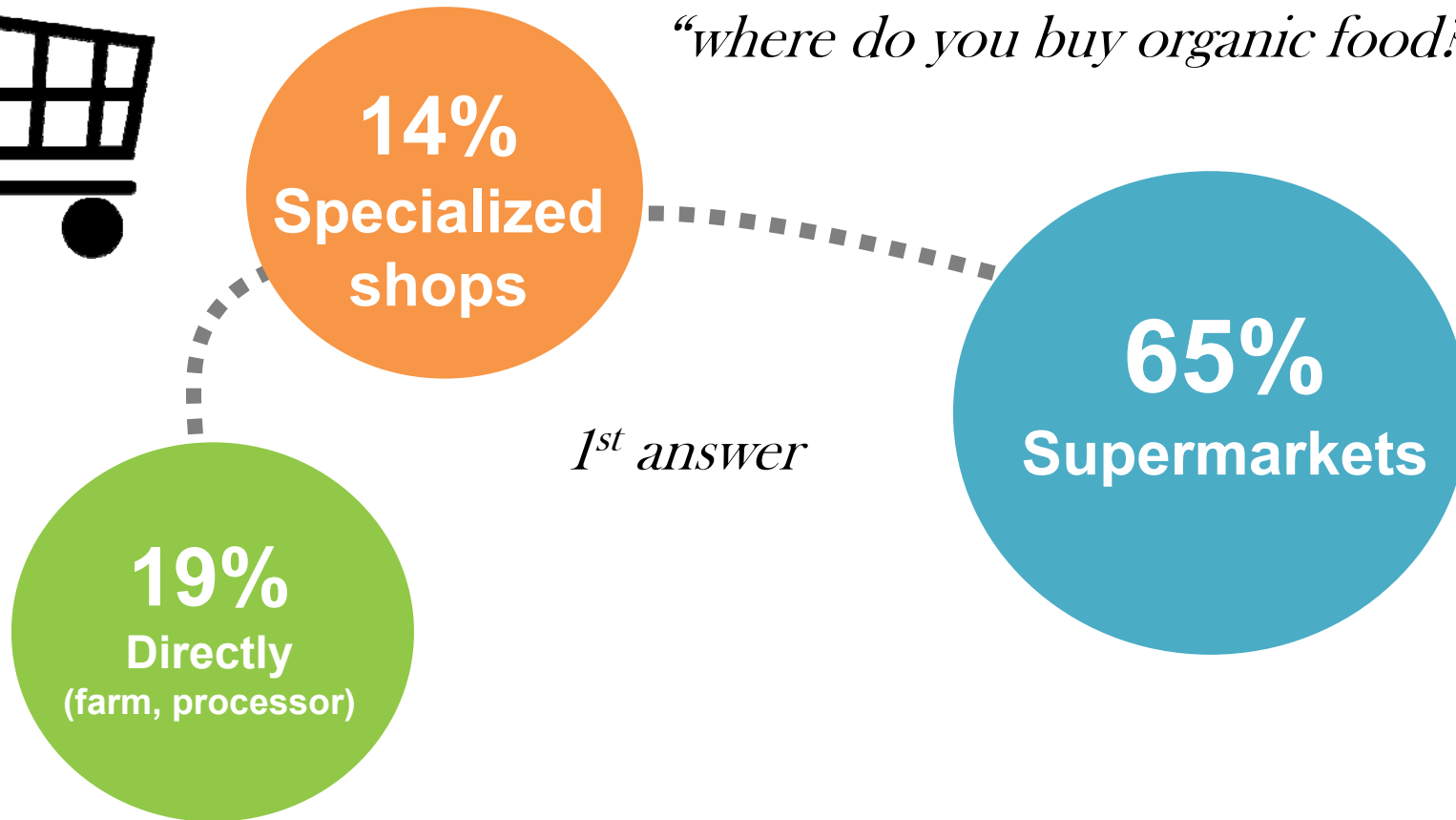


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# Consumption habits



*“where do you buy organic food?”*



Nomisma Consumer Survey, 2017  
850 consumers, responsible for their household food purchases.



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