

The Italian market for organic food
BIOFACH 2017
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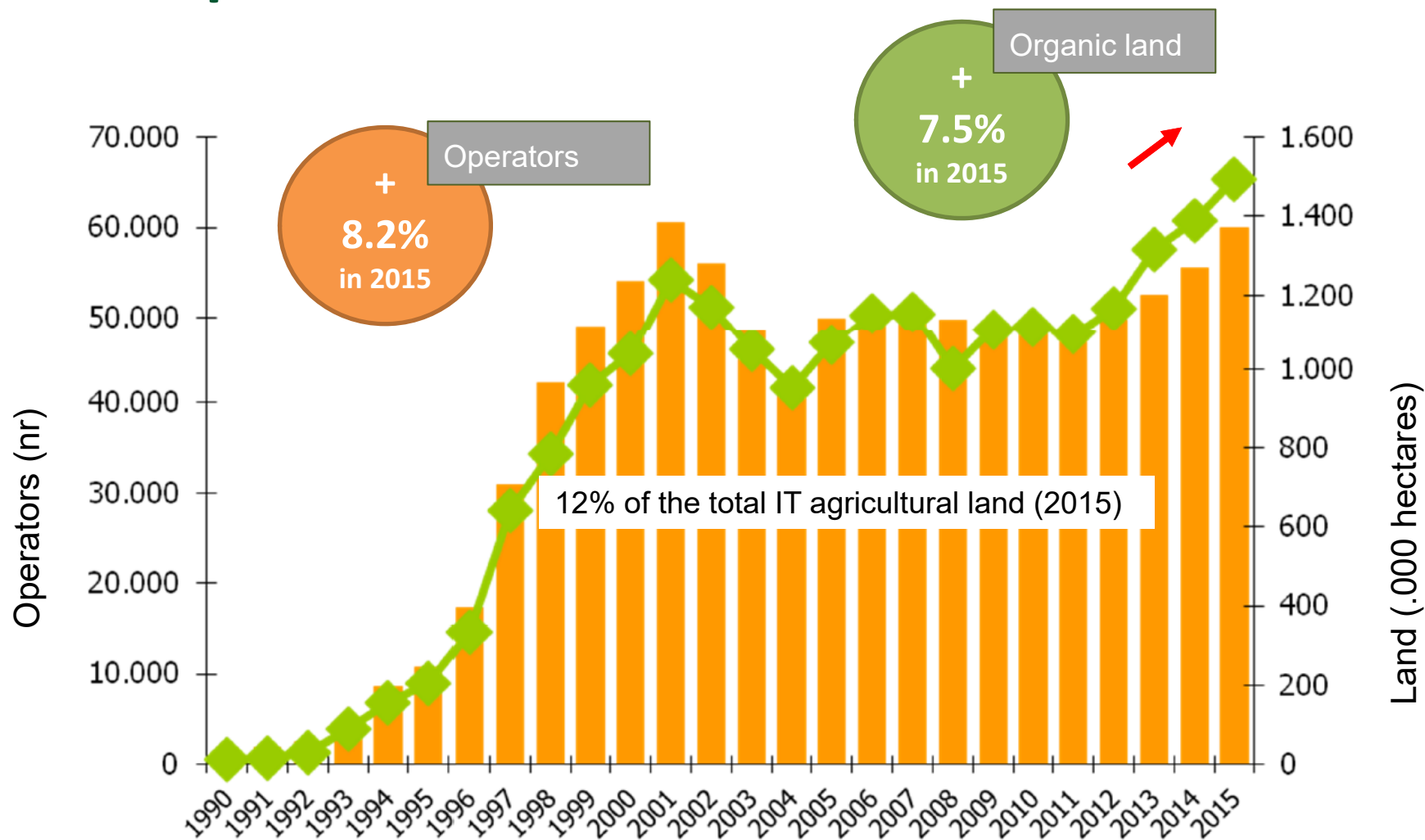


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Development of organic agricultural land and operators 1990-2015



Source: Sinab, 2017

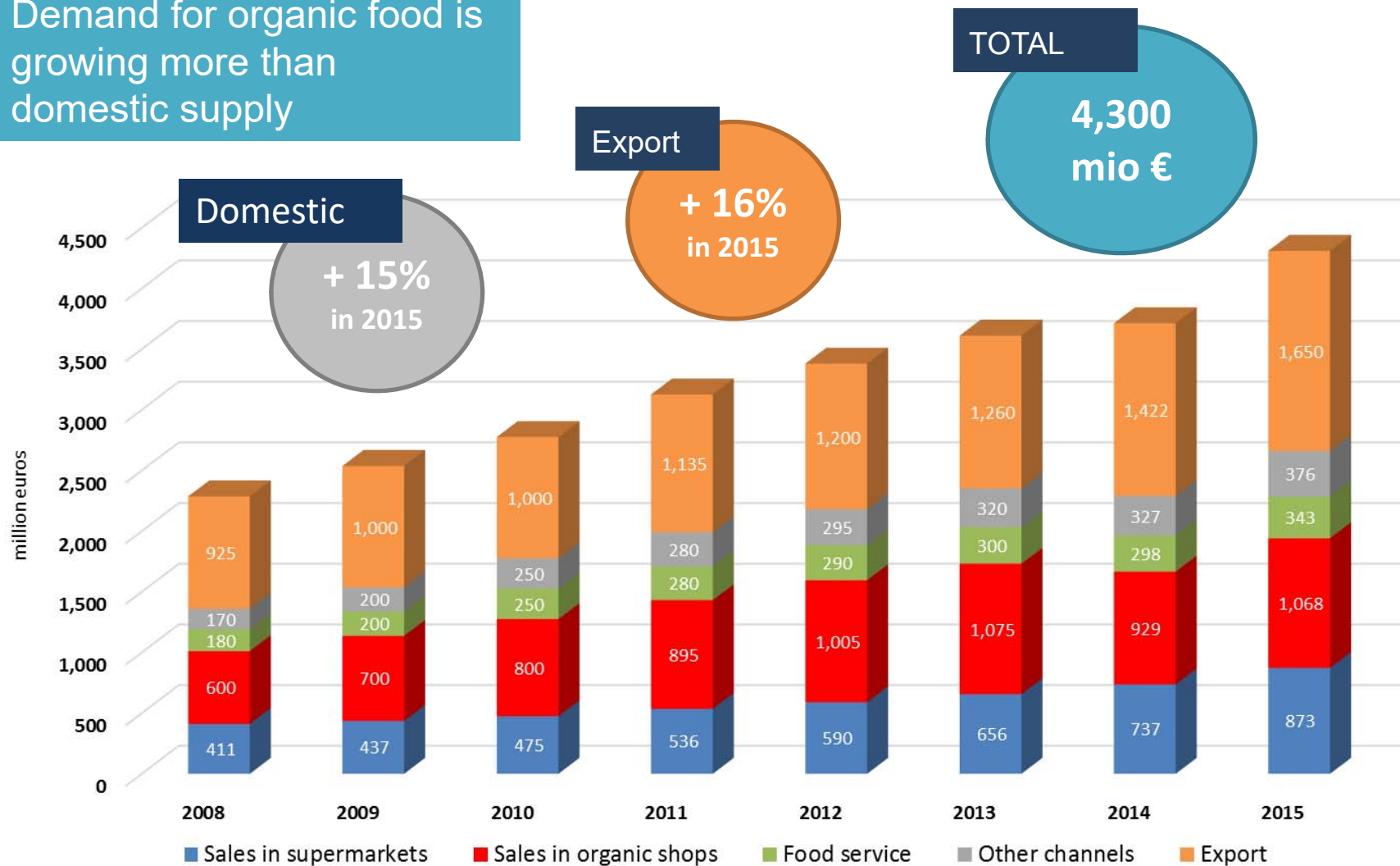


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Domestic consumption trend (million euros)

Demand for organic food is growing more than domestic supply



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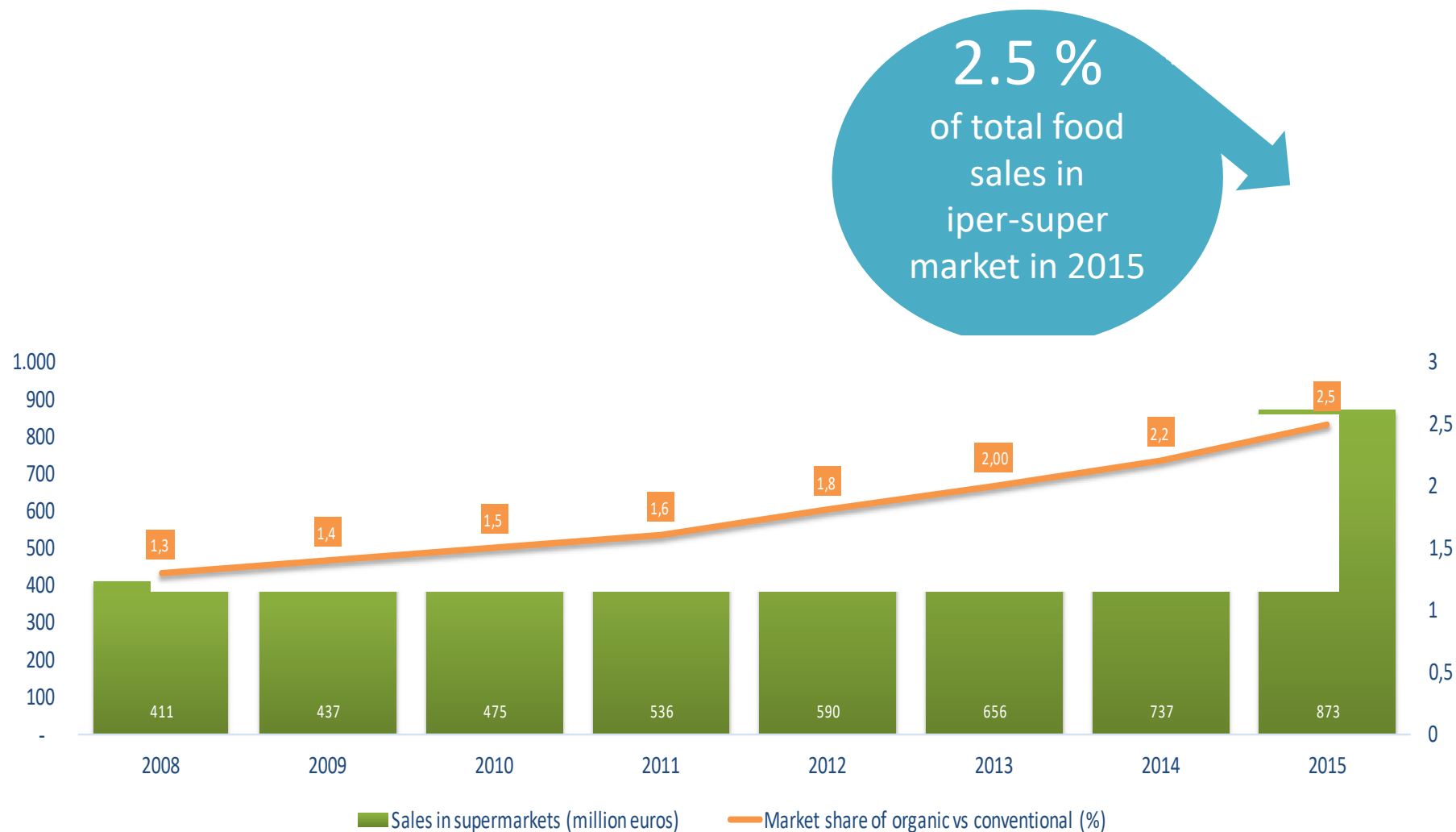


Source: ASSO BIO, 2017



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Sales of organic foods in super-iper markets



Source: ASSOBIO, 2017



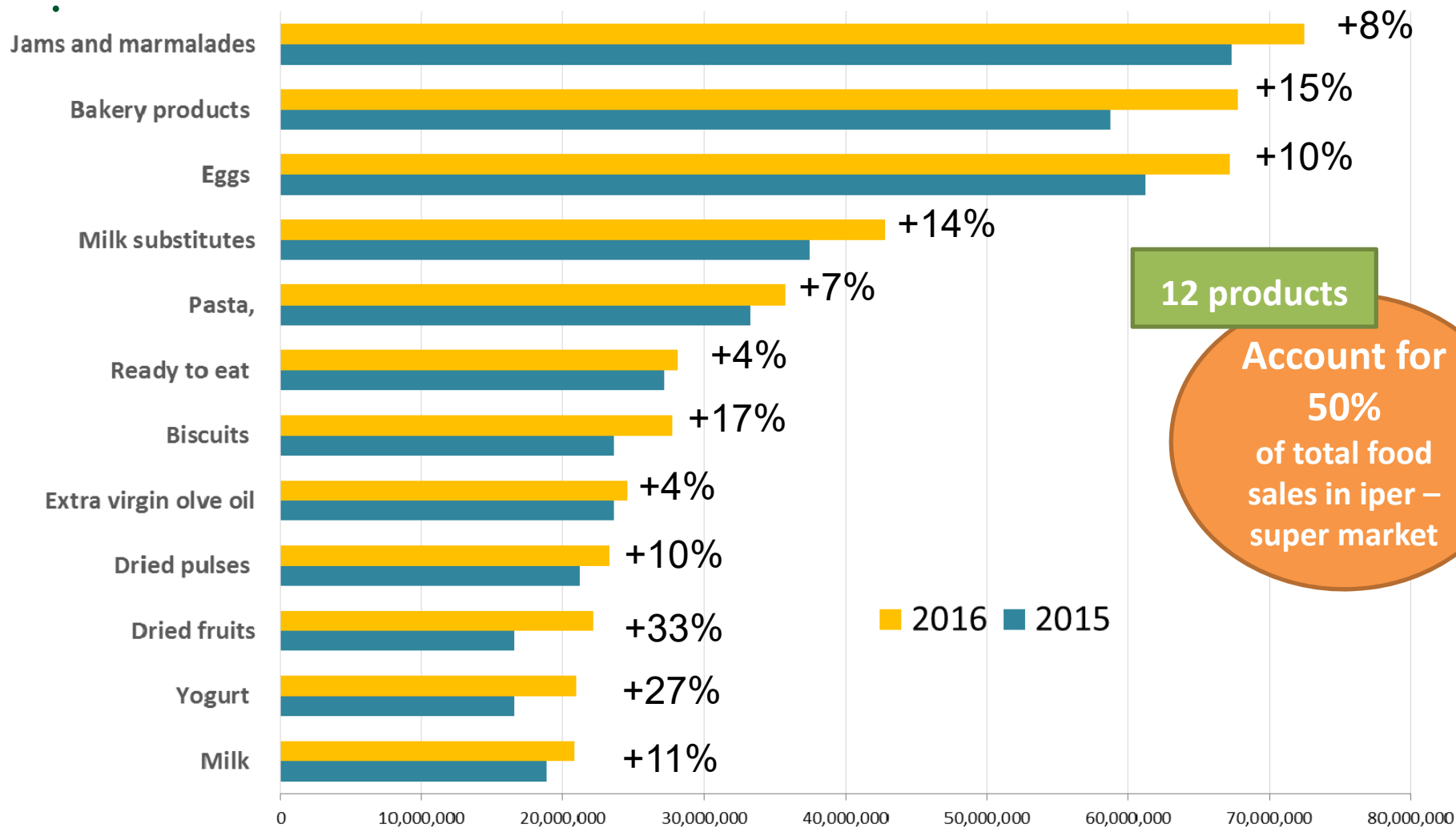
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Sales values changes 2016 in % super-iper markets (top 12 products)



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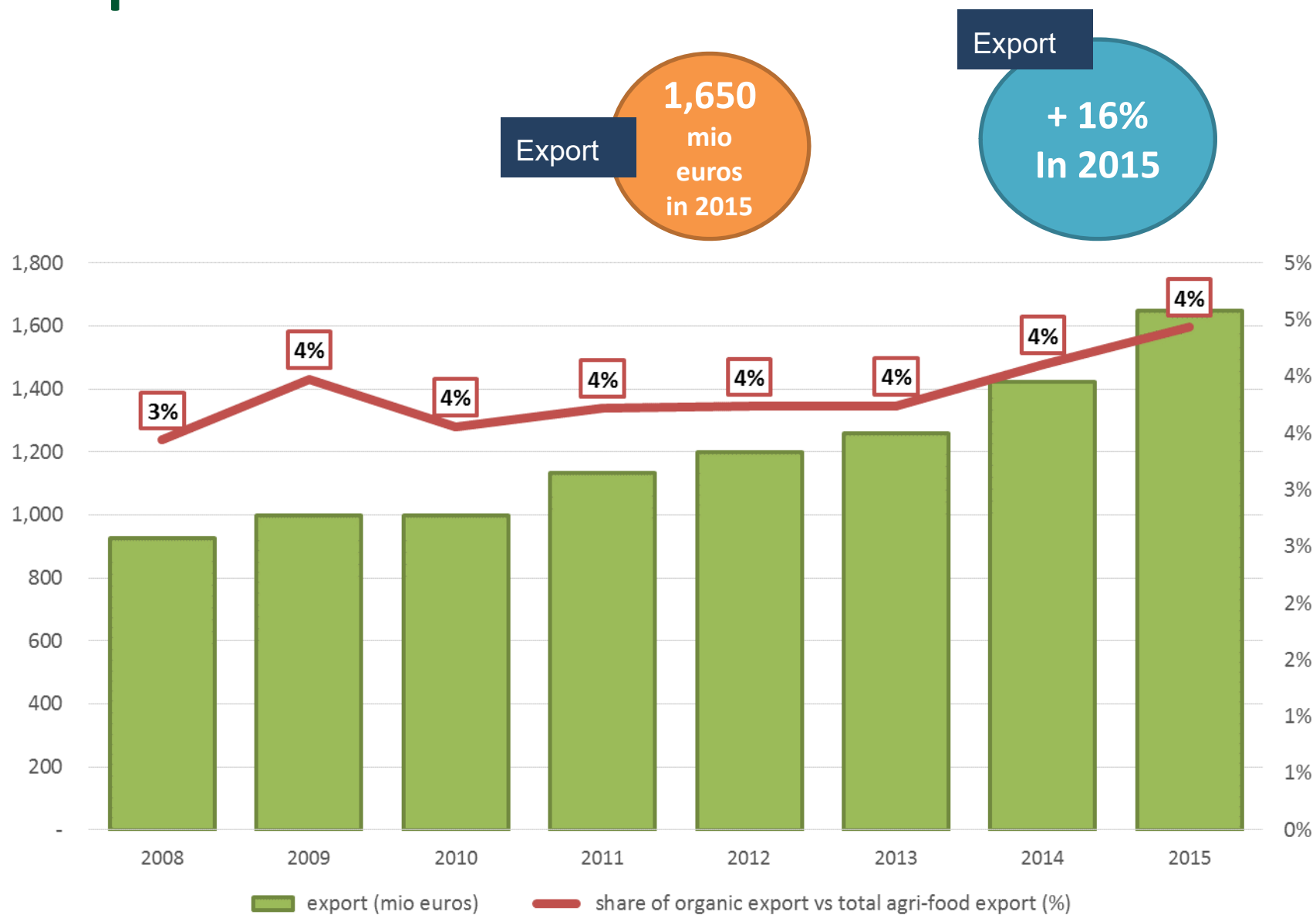


Source: ASSOBIO, 2017



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Export



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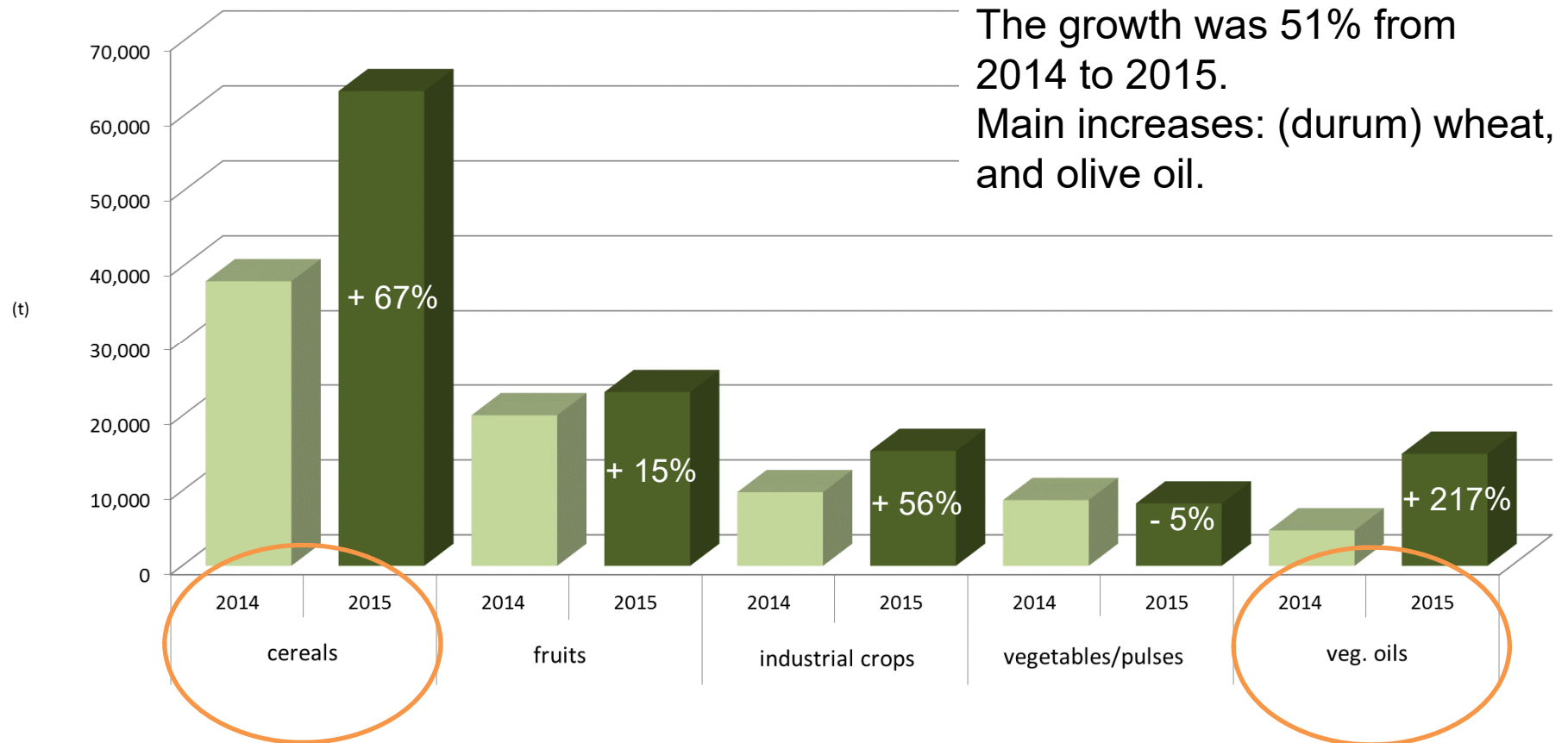
Source: ASSOBIO/NOMISMA, 2017



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Organic Import by product (2014 & 2015)

Imports of organic products to Italy are constantly rising due to increased demand unmet by domestic supply



Source: Sinab, 2017



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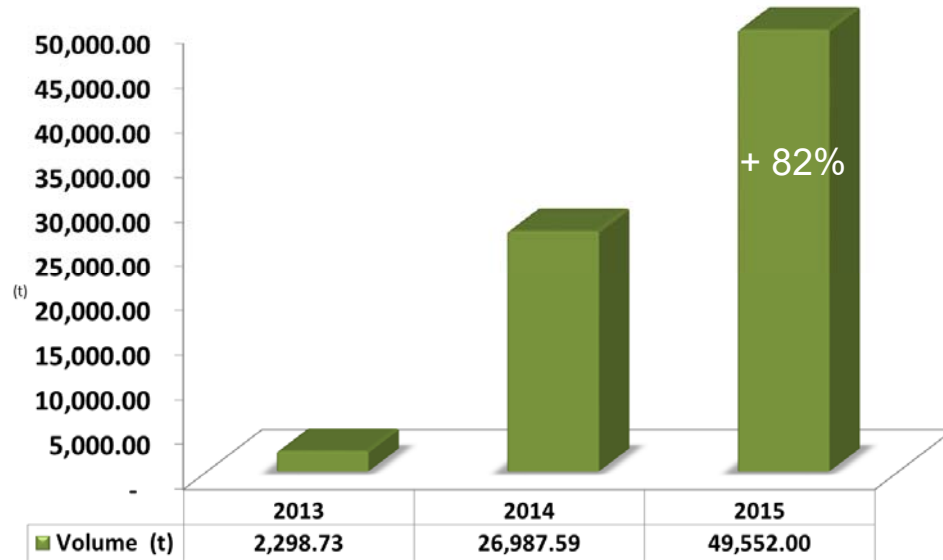


Wheat /import 2015

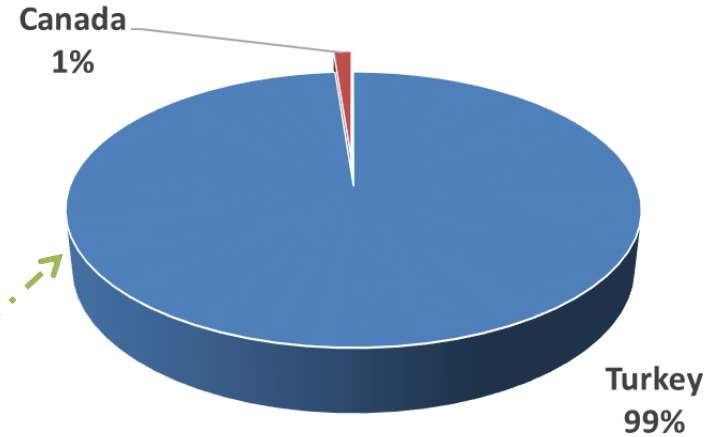
18% of IT domestic production.

UNIVPM estimations based on Ismea data on yields, 2013)

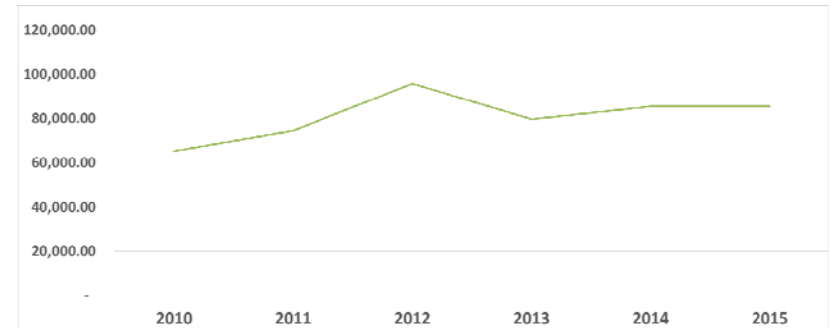
Imported from third countries



exporting countries (2015)



wheat – IT land area (ha)



Source: Sinab, 2017



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ORGANICDATA
NETWORK



Source: Sinab, 2016

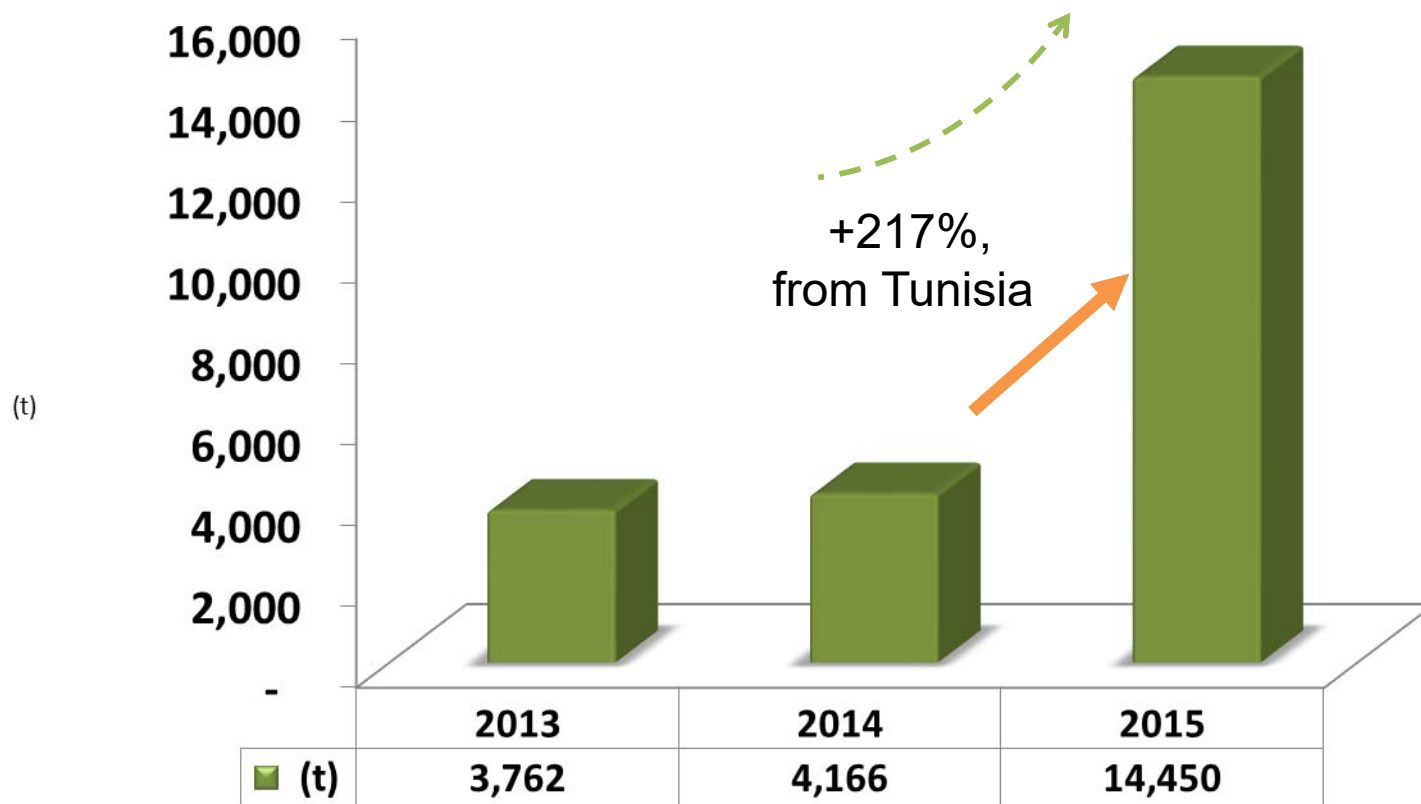


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Olive oil/Import 2015

25% of the IT domestic production

UNIVPM estimations based on Ismea data on yields, 2013)



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Conclusion

- As in 2014, the organic area has shown good growth.
- The market grew at a higher rate than the organic land, and at a higher rate than in the past.
- Imports of organic products into Italy are constantly rising due to surge in demand and the insufficient domestic production. Many of the big markets are dependent on imports.
- A policy mix of supportive measures (in addition to the area payment) are needed to improve conversion rate.
- Enhance the collaborative role of the supply chain members → common policy and marketing strategy



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Thank you!

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