The Italian market for organic food
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sinab

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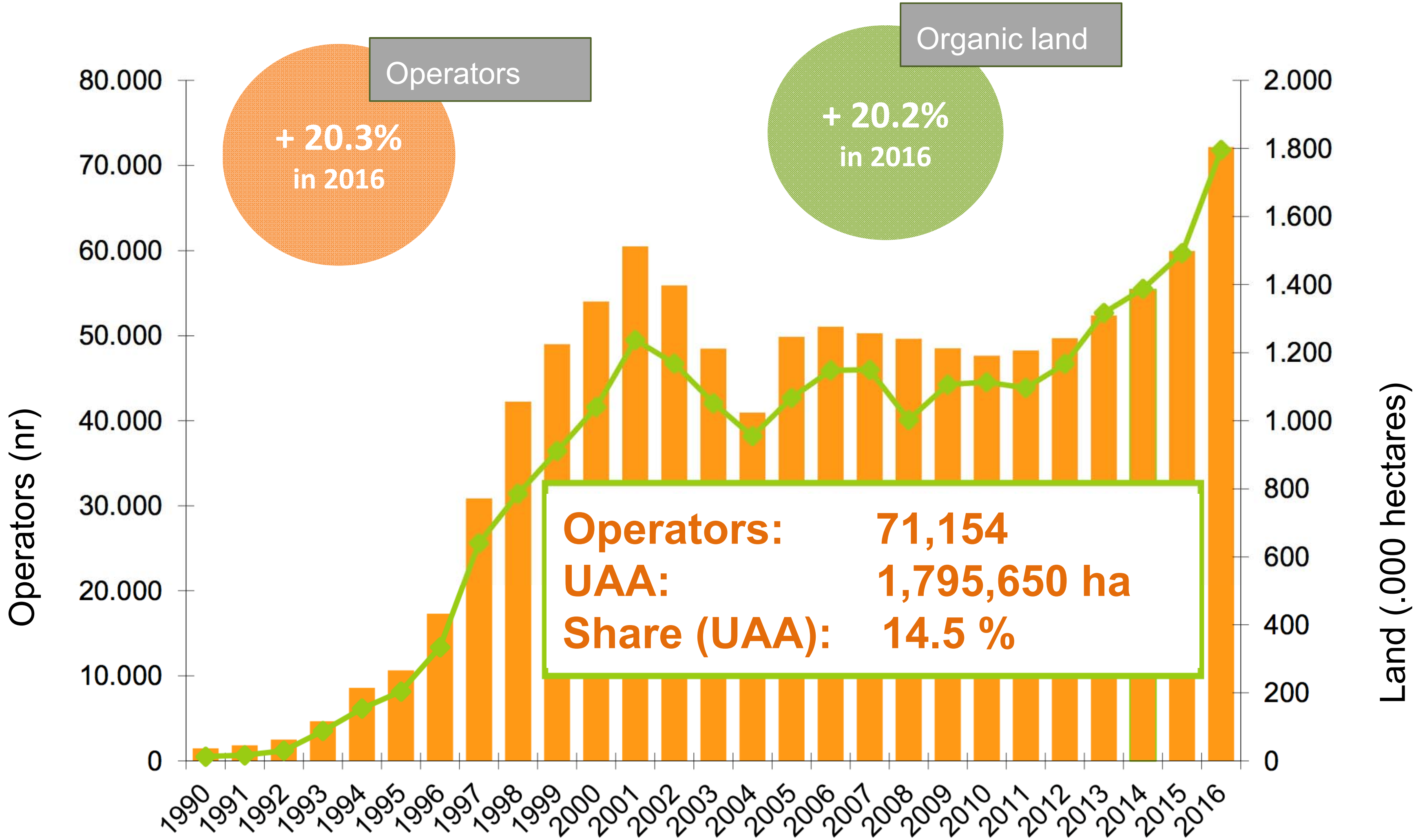
Ministero delle politiche agricole alimentari e forestali

Development of organic agricultural land and operators 1990-2016



Source: Sinab, 2017

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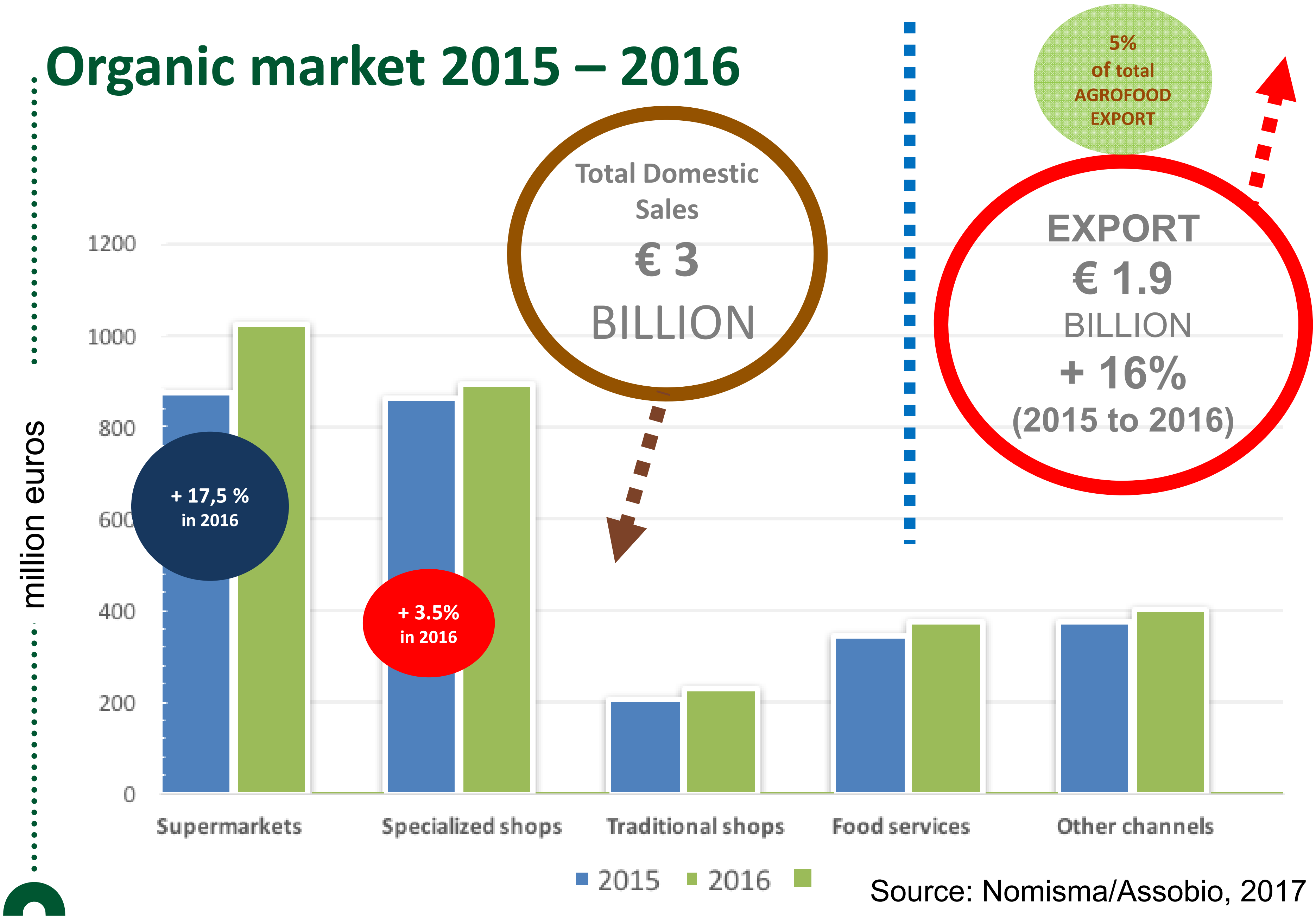
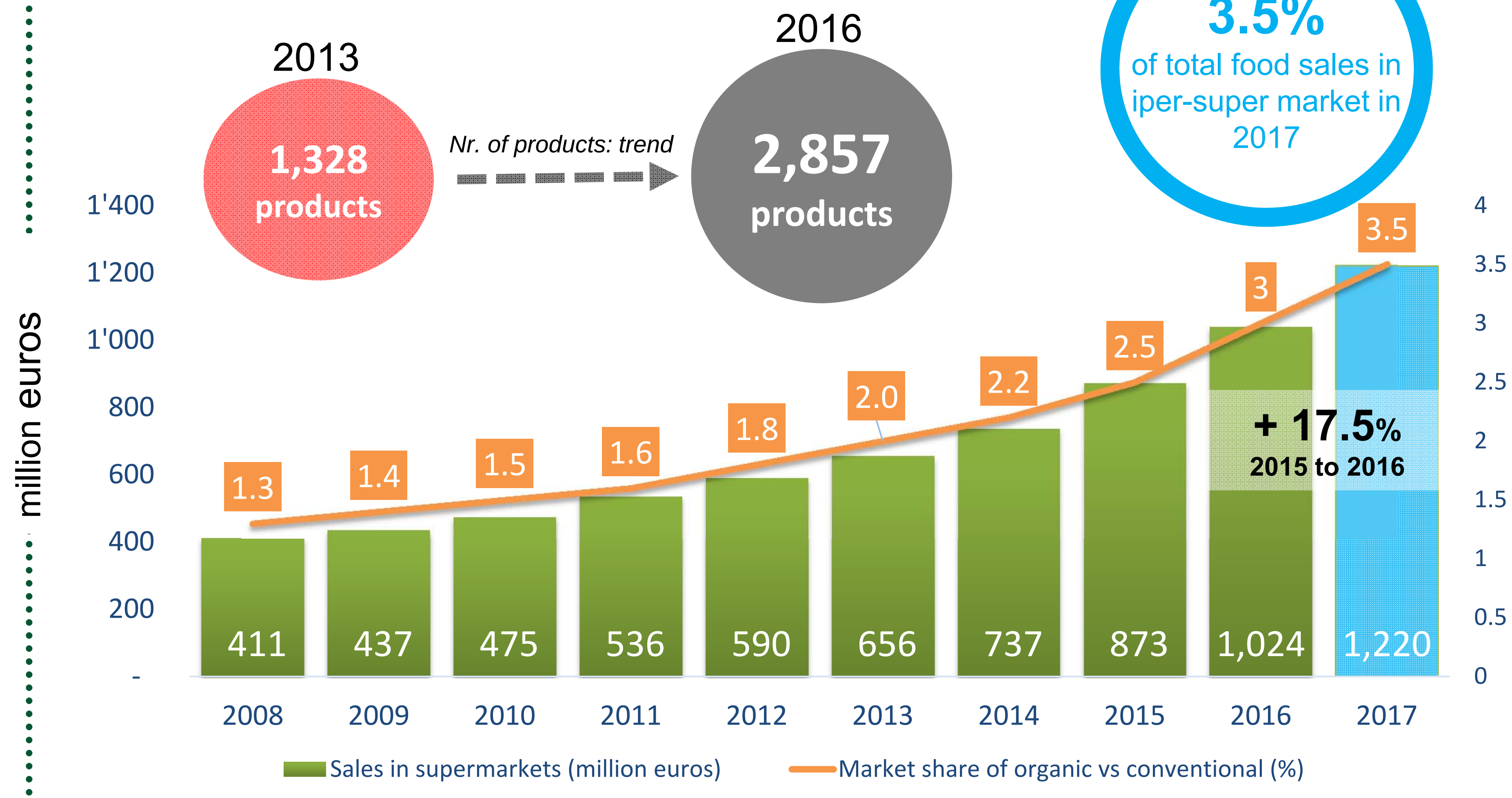
Organic market 2015 – 2016



Source: Nomisma/Assobio, 2017

Sales of organic foods in super-iper markets



Source: Nomisma/Assobio, 2017

Private market label share is expected to increase

Biobank, 2017

IN'S MERCATO

IPER

ITALY DISCOUNT

AGORÀ NETWORK

AUCHAN

BENNET

LIDL

MD

PAM PANORAMA

CARREFOUR

CONAD

COOP

SELEX

SIGMA

CRAI

DESPAR

ESSELUNGA

SIMPLY

TUODÌ

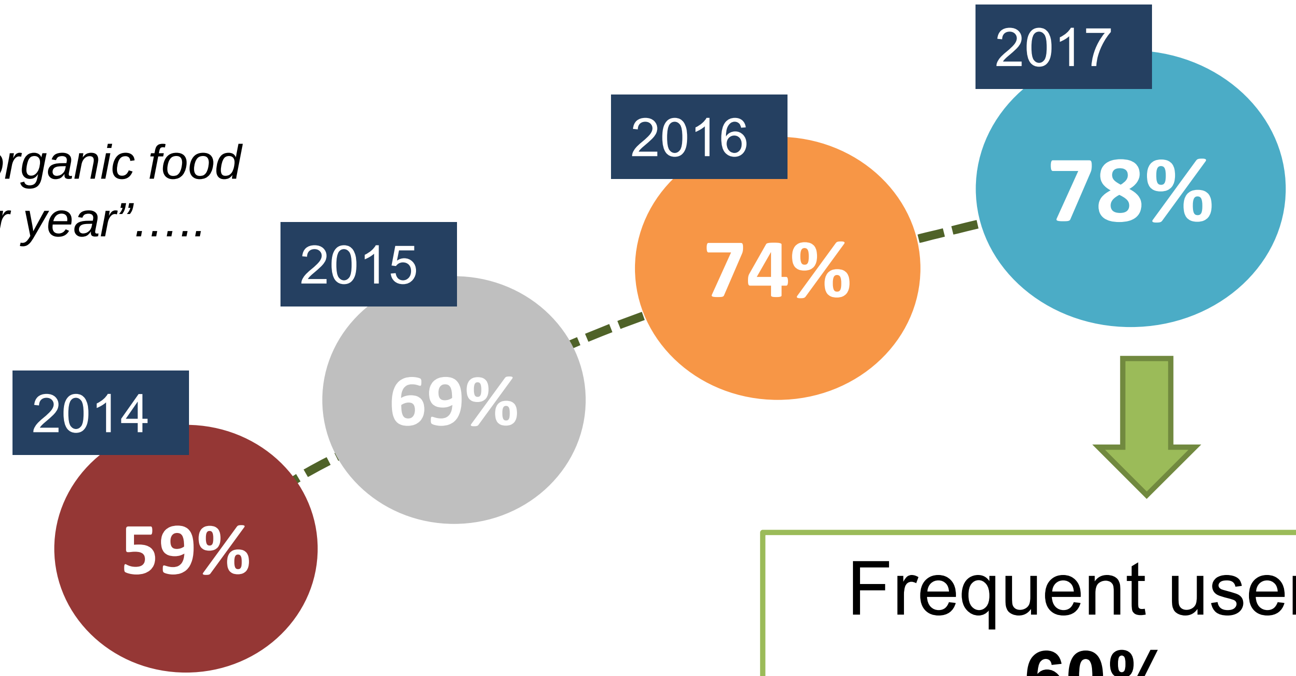
UNES

21
PRIVATE LABEL
IN 2016

Consumption habits

The number of consumers buying organic foodstuffs is growing

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



Frequent users
60%
: once per week

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

Consumption habits

"where do you buy organic food?"

14%
Specialized shops

65%
Supermarkets

1st answer

19%
Directly
(farm, processor)

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

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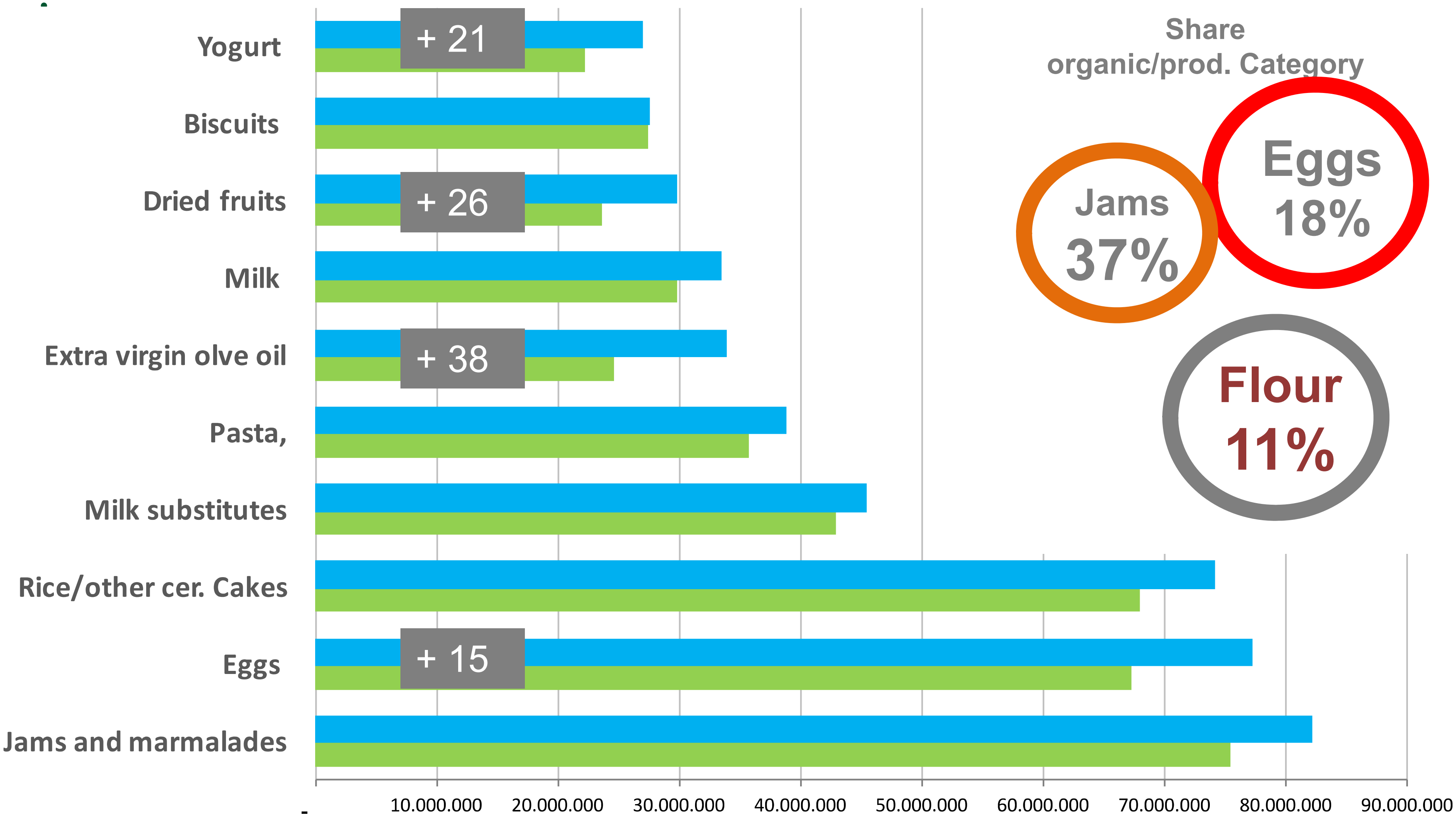
Sales values in super-iper markets (top 10 products)



Source: Nomisma/Assobio, 2017

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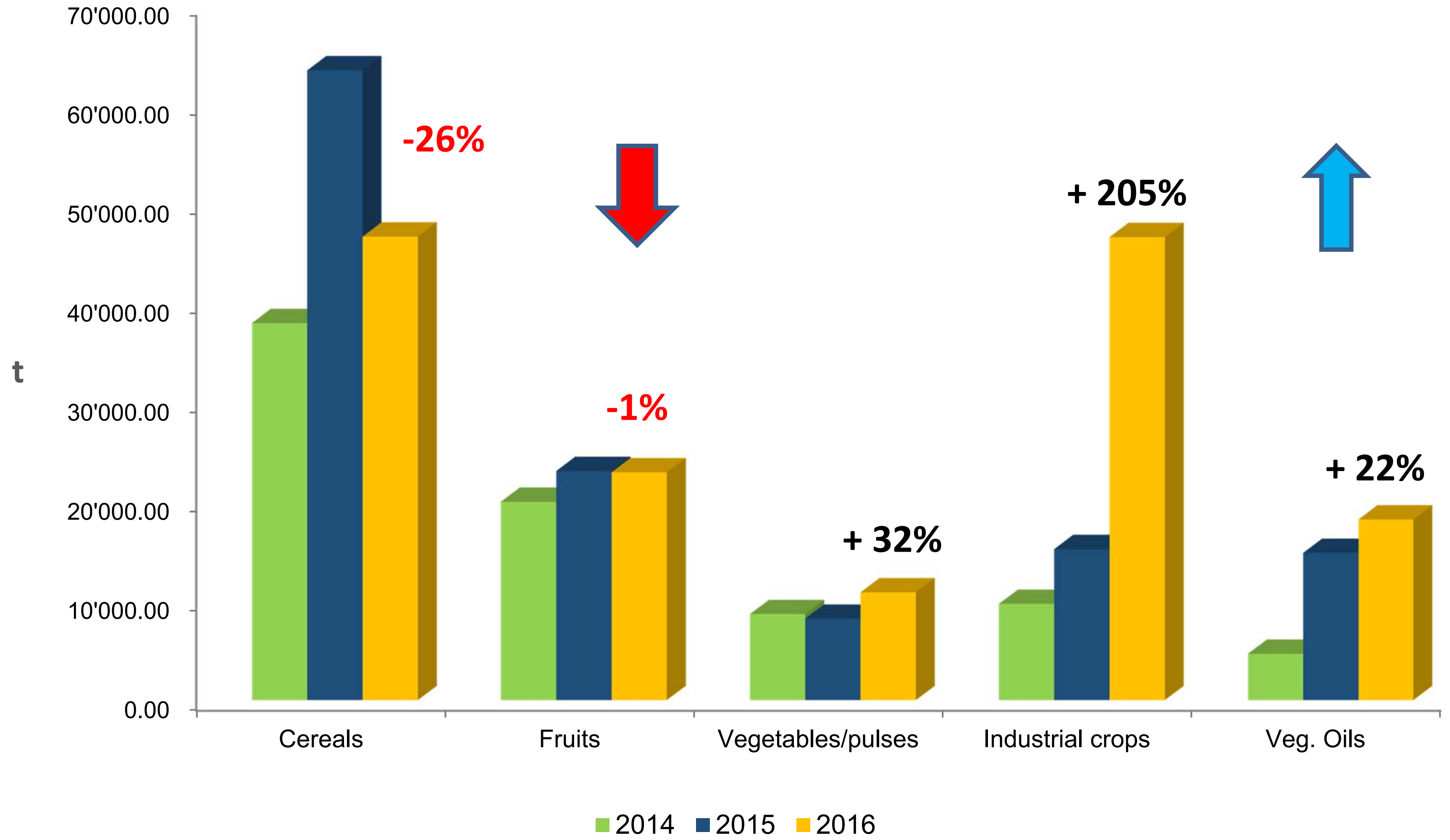
Organic Import by product (2014 - 2016)



Source: Sinab, 2017

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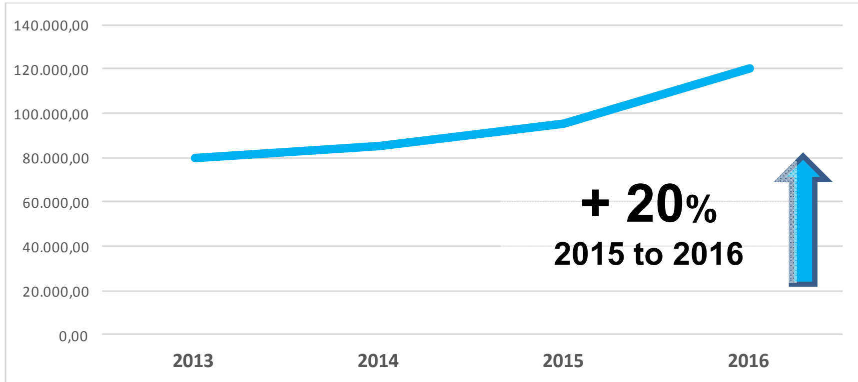
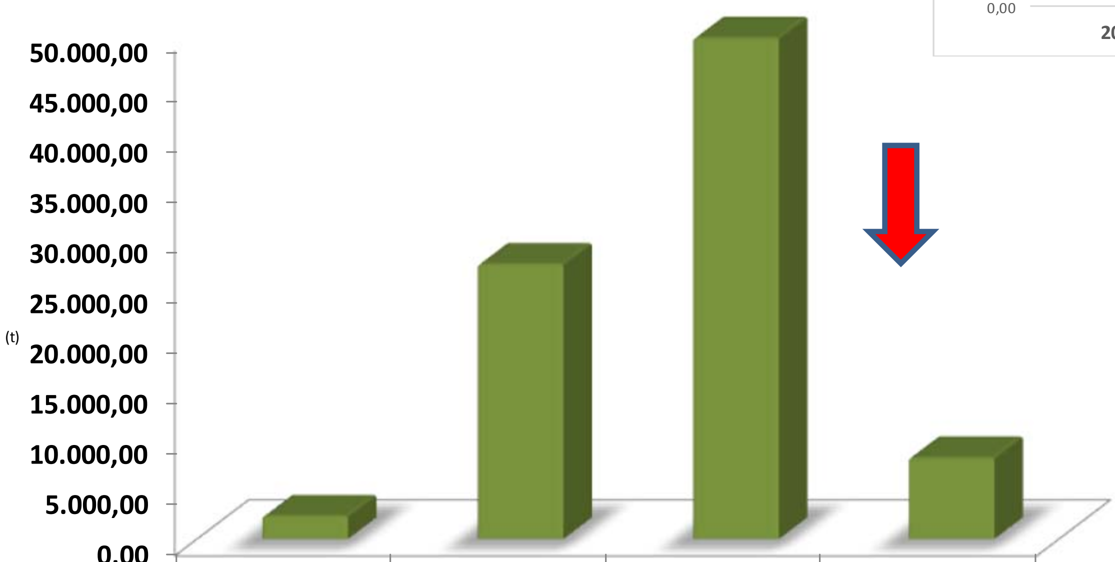
Wheat /import 2016

Wheat – IT land area (ha)



Imported from third countries



	2013	2014	2015	2016
volume (t)	2.298,73	27.281,42	49.710,88	8.079,82

Source: Sinab, 2017

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Source: Sinab, 2016

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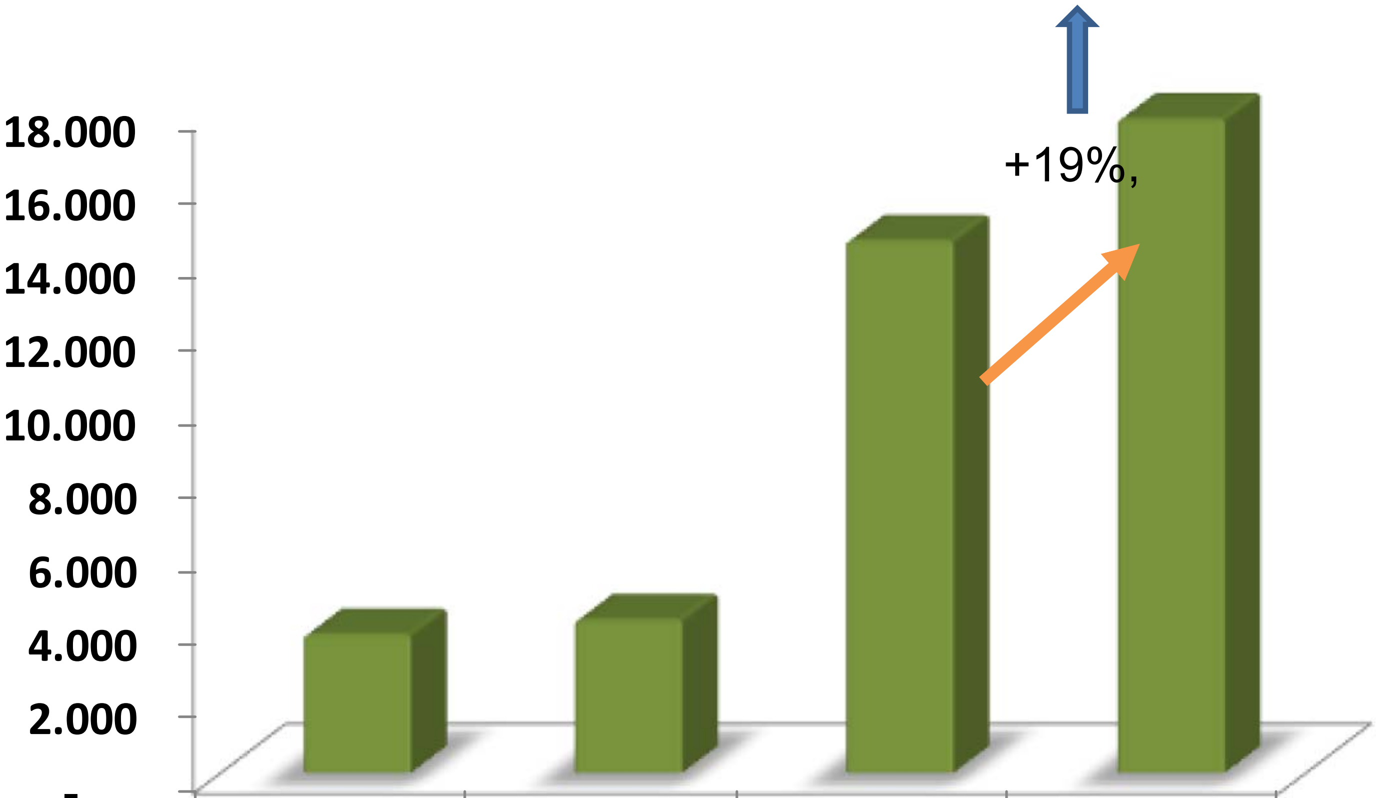
Olive oil/Import 2016

About 30% of the IT domestic poduction

UNIVPM estimations based on Ismea data on yields, 2013)

(t)



	2013	2014	2015	2016
(t)	3.762	4.166	14.450	17.756

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Conclusion

- As in 2016, the organic market (domestic and export) has shown good growth.

- The Italian organic market structure is gradually changing, with more business coming through iper-supermarket. This may give organic brands less potential.

- Organic land grew at a higher rate than in the past and some markets (fruit and cereals, but not vegetables and industrial crops) decrease their dependence from the imports.

- Some organic markets may have benefit from the strong collaborative role of some important supply chain in Italy in supporting the conversion to organic farming. While for some others a policy mix of supportive measures are needed to improve conversion rate and performance.

Thank you!

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