The Italian market for organic food
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Francesco Solfanelli, Raffaele Zanoli

Università Politecnica delle Marche
Development of organic agricultural land and operators 1990-2017

Source: Sinab, 2018

- Operators: 75,873
- UAA: 1,908,653 ha
- Share (UAA): 15.4%
- Operators: + 5.2% in 2017
- Organic land: + 6.3% in 2017
Organic market - 2018

Total Domestic Sales
€ 3.6 BILLION

+ 5% in 2018

Supermarkets
1,605 million euros

Specialised shops
865 million euros

Food services
415 million euros

Other channels
677 million euros

Export
2,060 million euros

+ 8.5% in 2018

Source: Nomisma/Assobio, 2018
Sales of organic food in Supermarkets and Discounts

Own elaboration based on AssoBio and Nomisma, 2018

+35% in 2018

+9% in 2018

Sales of organic food in Supermarkets and Discounts

Own elaboration based on AssoBio and Nomisma, 2018
Sales of organic foods in supermarkets

Source: Nomisma/Assobio, 2018

3.5% of total food sales in iper-super market in 2018

<table>
<thead>
<tr>
<th>Year</th>
<th>Nr. of products in super-iper: trend</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>1,328 products</td>
</tr>
<tr>
<td>2015</td>
<td>2,259 products</td>
</tr>
<tr>
<td>2017</td>
<td>3,529 products</td>
</tr>
</tbody>
</table>

Source: Nomisma/Assobio, 2018
Private market labels represent 45% of total sales of organic products in supermarkets.

Image showing various private label brands:
- EsseLunga
- Eurospin
- In's Mercato
- Iper
- Agorà Network
- Auchan
- Bennet
- Carrefour
- Conad
- Coop
- CRAI
- D.I.T
- Despar

24 Private labels in 2018

Biobank, 2018
Sales of organic foods in specialised shops

60% (910 out of 1,437) in retail chains

1,437 stores

2017

8 retail chains have their own “private market label”

1,295 stores

2013

1,437 stores

682 store

1993

1.437 stores

60% (910 out of 1.437) in retail chains

8 retail chains have their own “private market label”

- Bio C' Bon - 16
- Biobottega - 28
- Biosapori - 10
- Cuorebio - 228
- Ki Ama Bio - 300
- Mela Verde Bio - 12
- Naturasi - 245
- NaturPlus - 20
- Piacere Terra - 15
Supermarkets sales (top 10 products)

<table>
<thead>
<tr>
<th>Product</th>
<th>Organic sales /Total category sales</th>
<th>2018</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eggs</td>
<td>18.2%</td>
<td>104</td>
<td>-8.7</td>
</tr>
<tr>
<td>Soy Milk</td>
<td>31.9%</td>
<td>32</td>
<td>9.7</td>
</tr>
<tr>
<td>Jams..</td>
<td>37.6%</td>
<td>30</td>
<td>16</td>
</tr>
<tr>
<td>Dried fruits</td>
<td></td>
<td>28</td>
<td>20</td>
</tr>
<tr>
<td>Milk</td>
<td></td>
<td>31</td>
<td>24</td>
</tr>
<tr>
<td>Soy milk</td>
<td></td>
<td>38</td>
<td>31</td>
</tr>
<tr>
<td>Pasta</td>
<td></td>
<td>27</td>
<td>20</td>
</tr>
<tr>
<td>Vegetables</td>
<td></td>
<td>41</td>
<td>29</td>
</tr>
<tr>
<td>Yogurt</td>
<td></td>
<td>47</td>
<td>33</td>
</tr>
<tr>
<td>Fruits</td>
<td></td>
<td>55</td>
<td>41</td>
</tr>
<tr>
<td>Rice cakes</td>
<td></td>
<td>60</td>
<td>44</td>
</tr>
<tr>
<td>Jams and marmalades</td>
<td></td>
<td>70</td>
<td>54</td>
</tr>
<tr>
<td>Eggs</td>
<td>+16%</td>
<td>80</td>
<td>64</td>
</tr>
</tbody>
</table>

Note: Figures are in euros.
Organic Import by product (2016 - 2017)

Source: Sinab, 2018
**Fruit**

**Sales of organic fruit in supermarkets**

- 70.60 million euros in 2011
- 74.13 million euros in 2012
- 77.90 million euros in 2013
- 78.70 million euros in 2014
- 86.55 million euros in 2015
- 100.22 million euros in 2016
- 111.00 million euros in 2017

**Trend of organic fruit production**

- 23,674 hectares in 2013
- 21,751 hectares in 2014
- 23,629 hectares in 2015
- 29,920 hectares in 2016
- 33,761 hectares in 2017

Source: Sinab, 2016

**Import from third countries (tonnes)**

- 23,046.20 tonnes in 2016
- 35,556.78 tonnes in 2017

Source: Sinab, 2018
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 share**. 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!

Contacts and additional info:
Prof. Dr. Raffaele Zanoli
Dr. Francesco Solfanelli
Università Politecnica delle Marche
Via Brecce Bianche
60131 Ancona - Italy
Tel. +39 071 2204828
solfanelli@agrecon.univpm.it
www.univpm.it
Nomisma Consumer Survey, 2017
850 consumers, responsible for their household food purchases.

Consumption habits
The number of consumers buying organic foodstuffs is growing

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

- 59% in 2014
- 69% in 2015
- 74% in 2016
- 78% in 2017
- 81% in 2018

Frequent users: 60% - once per week

Ministero delle politiche agricole alimentari e forestali
Consumption habits

"where do you buy organic food?"

1st answer

65% Supermarkets

19% Directly (farm, processor)

14% Specialized shops

850 consumers, responsible for their household food purchases.

Nomisma Consumer Survey, 2017