The Italian market for organic food
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Development of organic agricultural land and operators 1990-2015

- Operators (nr)
  - + 8.2% in 2015

- Land (.000 hectares)
  - + 7.5% in 2015

12% of the total IT agricultural land (2015)

Source: Sinab, 2017
Domestic consumption trend (million euros)

Demand for organic food is growing more than domestic supply

Export +16% in 2015

Domestic +15% in 2015

TOTAL 4,300 mio €

Source: ASSOBIO, 2017
Sales of organic foods in super-iper markets

2.5 % of total food sales in iper-super market in 2015

Source: ASSOBIO, 2017
Sales values changes 2016 in %
super-iper markets (top 12 products)

- Jams and marmalades: +8%
- Bakery products: +15%
- Eggs: +10%
- Milk substitutes: +14%
- Pasta: +7%
- Ready to eat: +4%
- Biscuits: +17%
- Extra virgin olive oil: +4%
- Dried pulses: +10%
- Dried fruits: +33%
- Yogurt: +27%
- Milk: +11%

Account for 50% of total food sales in super market

Source: ASSOBIO, 2017
Export

1,650 mio euros in 2015

In 2015 + 16%

Source: ASSOBIO/NOMISMA, 2017
Imports of organic products to Italy are constantly rising due to increased demand unmet by domestic supply. The growth was 51% from 2014 to 2015. Main increases: (durum) wheat, and olive oil.

Source: Sinab, 2017
Wheat import 2015

18% of IT domestic production.

Imported from third countries

UNIVPM estimations based on Ismea data on yields, 2013)

Source: Sinab, 2017

Source: Sinab, 2016

exporting countries (2015)

- Turkey 99%
- Canada 1%

wheat – IT land area (ha)

Volume (t) | 2013 | 2014 | 2015 |
---|---|---|---|
2,298.73 | 26,987.59 | 49,552.00 | + 82%
Olive oil/Import 2015

25% of the IT domestic production

UNIVPM estimations based on Ismea data on yields, 2013)

+217%, from Tunisia

<table>
<thead>
<tr>
<th>Year</th>
<th>(t)</th>
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<tbody>
<tr>
<td>2013</td>
<td>3,762</td>
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<tr>
<td>2014</td>
<td>4,166</td>
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<tr>
<td>2015</td>
<td>14,450</td>
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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
Thank you!

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