The Italian market for organic food
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Development of organic agricultural land and operators 1990-2016

Operators: 71,154
UAA: 1,795,650 ha
Share (UAA): 14.5%

Source: Sinab, 2017
Organic market 2015 – 2016

Total Domestic Sales
€ 3 BILLION

Export
€ 1.9 BILLION
+ 16%
(2015 to 2016)

Source: Nomisma/Assobio, 2017
Sales of organic foods in super-iper markets

- **2013**: 1,328 products
- **2016**: 2,857 products

**Sales in supermarkets (million euros)**

- 2008: 411
- 2009: 437
- 2010: 475
- 2011: 536
- 2012: 590
- 2013: 656
- 2014: 737
- 2015: 873
- 2016: 1,024
- 2017: 1,220

**Market share of organic vs conventional (%)**

- **2015 to 2016**: + 17.5%

**Source**: Nomisma/Assobio, 2017
Private market label share is expected to increase

Biobank, 2017

PRIVATE LABEL
IN 2016

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?”

1st answer

14% Specialized shops

65% Supermarkets

19% Directly (farm, processor)

Nomisma Consumer Survey, 2017
850 consumers, responsible for their household food purchases.
Sales values in super-iper markets (top 10 products)

Source: Nomisma/Assobio, 2017

<table>
<thead>
<tr>
<th>Product</th>
<th>Share organic/prod. Category</th>
<th>Sales value (euro)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yogurt</td>
<td></td>
<td></td>
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<tr>
<td>Biscuits</td>
<td></td>
<td></td>
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<tr>
<td>Dried fruits</td>
<td>+ 26</td>
<td></td>
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<tr>
<td>Milk</td>
<td></td>
<td></td>
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<tr>
<td>Extra virgin olive oil</td>
<td>+ 38</td>
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<tr>
<td>Pasta,</td>
<td></td>
<td></td>
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<tr>
<td>Milk substitutes</td>
<td></td>
<td></td>
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<tr>
<td>Rice/other cer. Cakes</td>
<td></td>
<td></td>
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<tr>
<td>Eggs</td>
<td>+ 15</td>
<td></td>
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<tr>
<td>Jams and marmalades</td>
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- Source: Nomisma/Assobio, 2017
- Jams: 37%
- Eggs: 18%
- Flour: 11%
Organic Import by product (2014 - 2016)

Source: Sinab, 2017
Wheat /import 2016

Imported from third countries

Source: Sinab, 2017
## Olive oil/Import 2016

**About 30% of the IT domestic production**

UNIVPM estimations based on Ismea data on yields, 2013

<table>
<thead>
<tr>
<th></th>
<th>2013 (t)</th>
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<th>2015 (t)</th>
<th>2016 (t)</th>
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<tr>
<td></td>
<td>3.762</td>
<td>4.166</td>
<td>14.450</td>
<td>17.756</td>
</tr>
</tbody>
</table>

+19%,
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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