The Italian Market for Organic Food
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Development of organic agricultural land and operators 1990-2018

- Number of operators: + 4.2% 18/17
- Land: + 2.6% 18/17

Operators (nr): 79,046
UAA (ha): 1,958,045
Share (UAA): 15.5%

Source: SINAB, 2019
Organic food sales in Italy, 2019

**Total Domestic Sales**

- **Supermarkets and discount**
  - €2.0 BILLION in 2019
  - +6% 19/18

- **Specialised shops**
  - €700 million in 2019
  - -3% 19/18

- **Other channels**
  - (food services, traditional shops)
  - €900 million in 2019
  - +13% 19/18

**Export**

- €2.3 BILLION in 2018
- +10% 18/17

*Own estimation based on AssoBio, 2019*
Growth rates of sales values

*household purchases in Italy, 2019 vs 2018 (%)*

- **Tops**
  - Wines and sparkling wines
  - Fresh meat
  - Eggs
  - Vegetable oils
  - Cereal products
  - Cured meat
  - Vegetables

- **Flops**
  - Milk and dairy products
  - Fruit

Source: own elaboration based on SINAB, 2019
The Italian Market for Organic Food

Sales values of organic foods in supermarkets

<table>
<thead>
<tr>
<th>Year</th>
<th>Nr. of products in supermarkets: 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>2018</td>
<td>4,529 products</td>
</tr>
</tbody>
</table>

Sales values of organic foods in supermarkets:

<table>
<thead>
<tr>
<th>Year</th>
<th>Sales values of organic foods in supermarkets (million euros)</th>
<th>Organic share of the total food market (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>411</td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>437</td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td>475</td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>536</td>
<td></td>
</tr>
<tr>
<td>2012</td>
<td>590</td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td>656</td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td>737</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>873</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td>1,024</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>1,181</td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>1,293</td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td>1,350</td>
<td></td>
</tr>
</tbody>
</table>

Organic shares are rising

Own elaboration based on AssoBio and Nielsen, 2018
Supermarkets sales (top 10 products)

Organic food sales in supermarket (million euro)

<table>
<thead>
<tr>
<th>Product</th>
<th>2018</th>
<th>2019</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Soy milk</td>
<td>35</td>
<td>32</td>
<td>-3.6%</td>
</tr>
<tr>
<td>Milk</td>
<td>40</td>
<td>37</td>
<td>-3.6%</td>
</tr>
<tr>
<td>Dried fruits</td>
<td>30</td>
<td>25</td>
<td>-16.7%</td>
</tr>
<tr>
<td>Yogurt</td>
<td>50</td>
<td>55</td>
<td>+10.0%</td>
</tr>
<tr>
<td>Pasta</td>
<td>45</td>
<td>48</td>
<td>+6.7%</td>
</tr>
<tr>
<td>Fruits</td>
<td>60</td>
<td>65</td>
<td>+8.3%</td>
</tr>
<tr>
<td>Rice cakes</td>
<td>55</td>
<td>60</td>
<td>+9.1%</td>
</tr>
<tr>
<td>Vegetables</td>
<td>70</td>
<td>75</td>
<td>+7.1%</td>
</tr>
<tr>
<td>Jams and marmalades</td>
<td>90</td>
<td>95</td>
<td>+5.6%</td>
</tr>
<tr>
<td>Eggs</td>
<td>100</td>
<td>100</td>
<td>0%</td>
</tr>
</tbody>
</table>

Tops: Jams +9.2%, Eggs +9.2%
Flops: Soy milk -3.6%, Pasta -3.6%
Organic and total food growth (%) rate for the sales values in supermarkets
Export destination for IT organic food
% of sales by country

- France: 22%
- Germany: 17%
- Scandinavia: 7%
- USA: 6%
- Spain: 6%
- Est-Europe: 6%
- Benelux: 6%
- Japan: 6%
- Austria: 5%
- UK: 5%
- Switzerland: 3%
- China: 3%
- Canada: 1%
- Russia: 1%
- Other: 5%

77% EUROPE
23% OTHER

EXPORT € 2.3 BILLION in 2018

Source: Osservatorio SANA, 2019
The Italian Market for Organic Food

Organic Import by product (2017 - 2018)
Annual growth rate of import (value), UAA (ha) and sales (value) of fruit and vegetables (in %) from the third countries
• In 2019, organic food sales in Italy grew at lower rate than in the past years. On average, sales of organic product in supermarkets rose by 6%, while specialised shops sales decreased of about 3%.

• The Italian organic market structure continues to change, with discounts increasing their marklet share (+15%).

• Italian’s eating habits are also changing: food away from home (e.g. food services, restaurant, bar) is increasing

• Organic land grew at a lower rate than in the past two years and for some categories (e.g. fruit, veg, pulses and olive oil) the domestic market still relies for a quite big percentage on imports.
Thank you!

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