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POLITECNICA
DELLE MARCHE

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Dipartimento di Scienze Agrarie,
Alimentari ed Ambientali

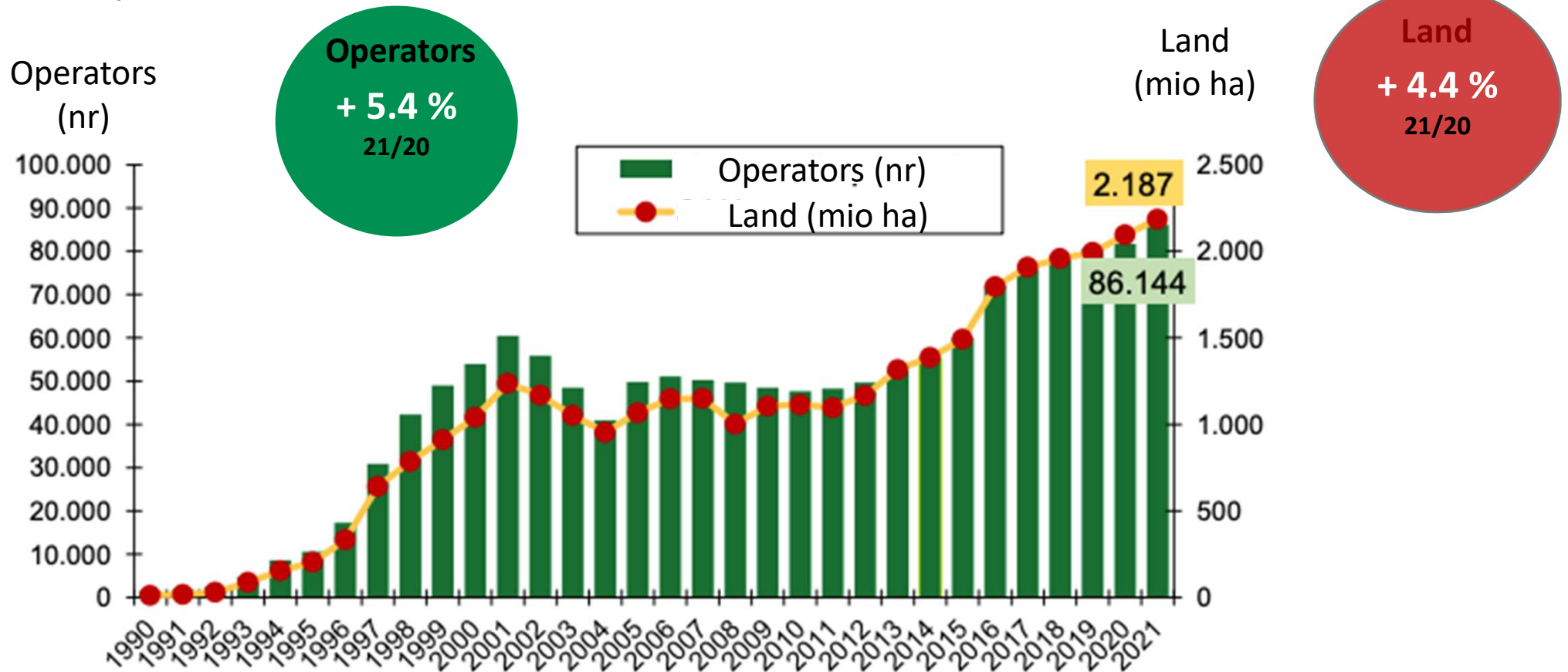
The Italian Market for Organic Food

Nuremberg, Germany 26.07.2022; 12.00 – 13.00
Saal Seoul (NCC Ost)

Raffaele Zanoli
Francesco Solfanelli



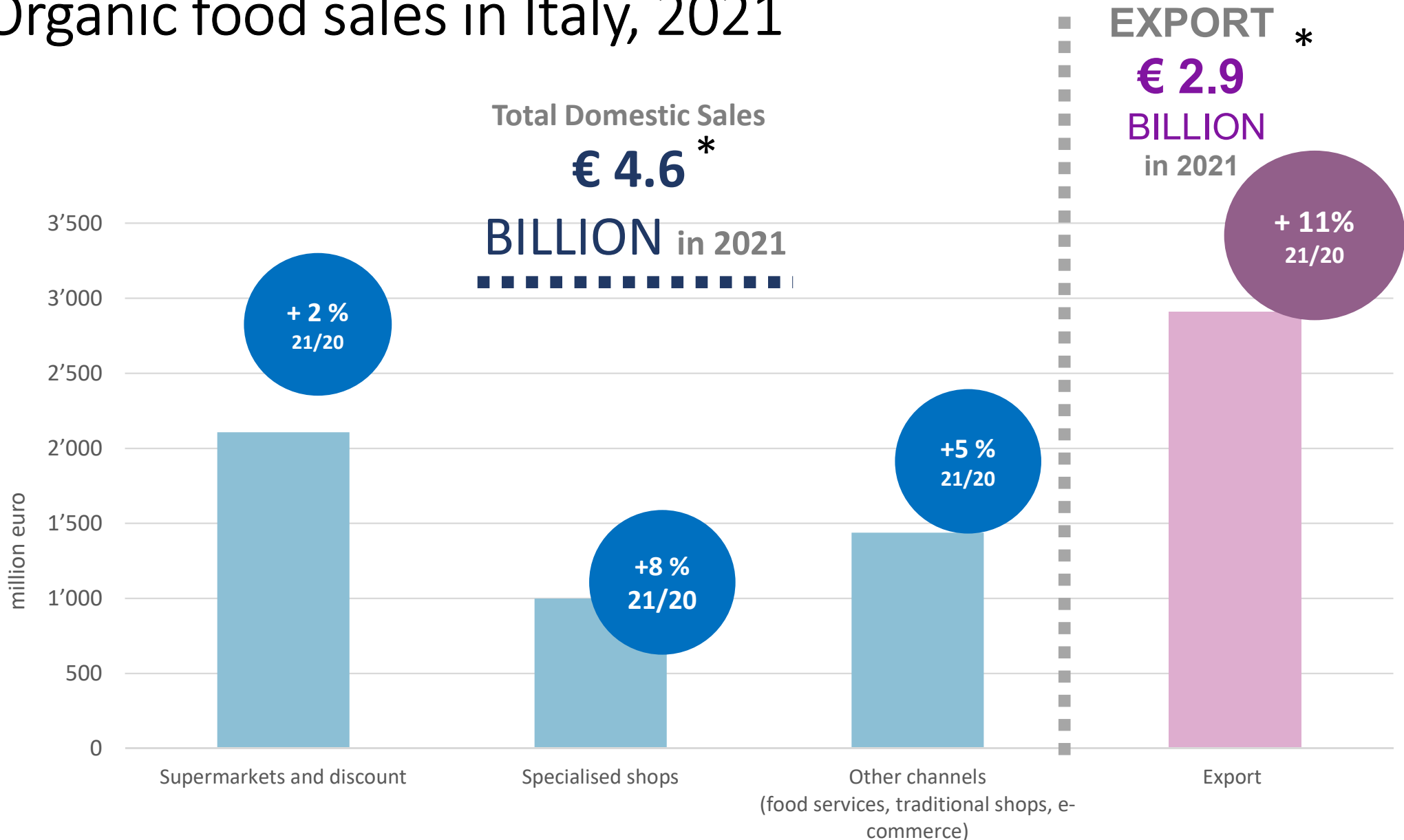
Development of organic agricultural land and operators 1990-2021



Operators (nr)	86,144
UAA (ha)	2,187,000
Share (UAA)	17.4%



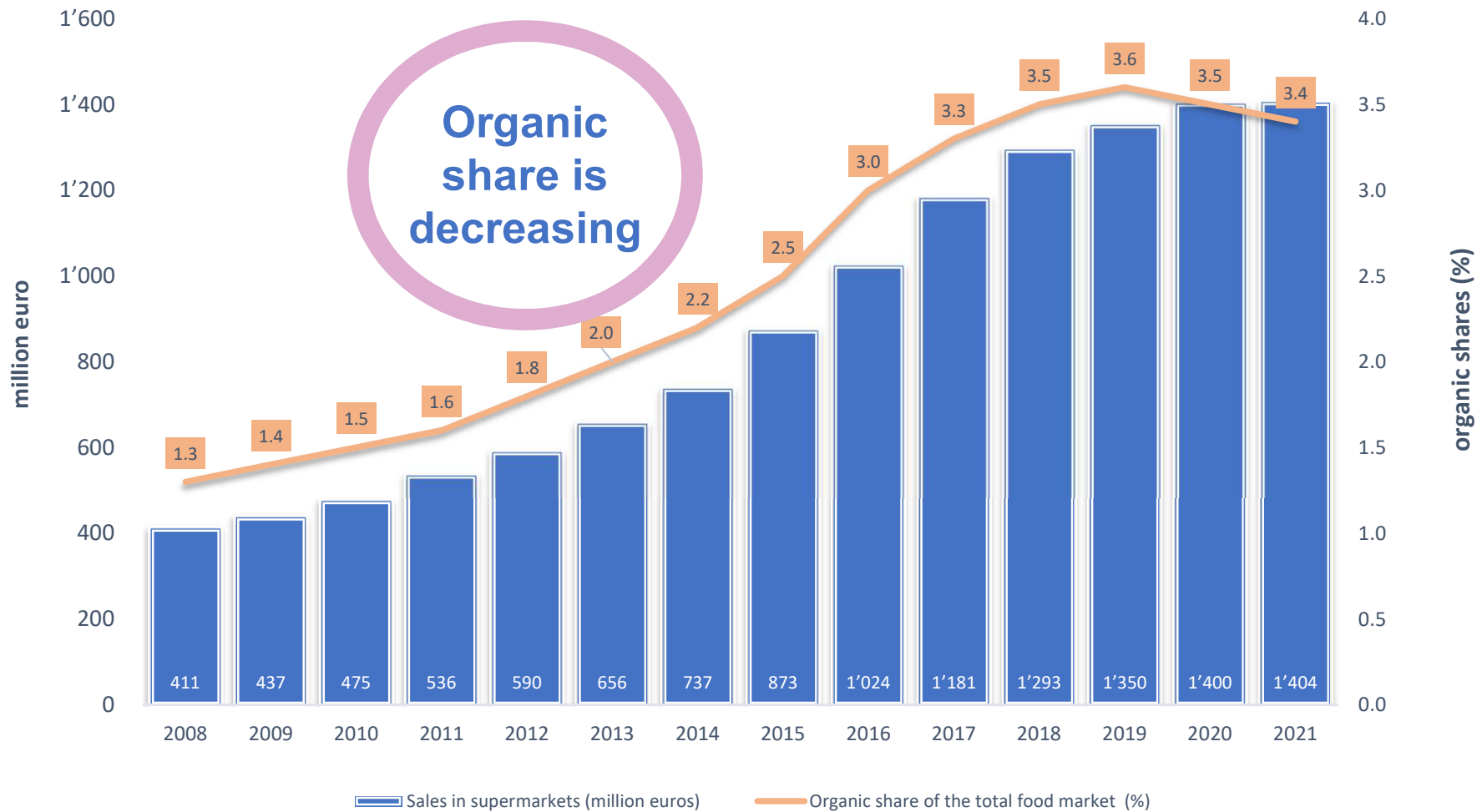
Organic food sales in Italy, 2021



* Own estimation based on Osservatorio SANA -Nomisma, 2021



Sales values of organic foods in supermarkets



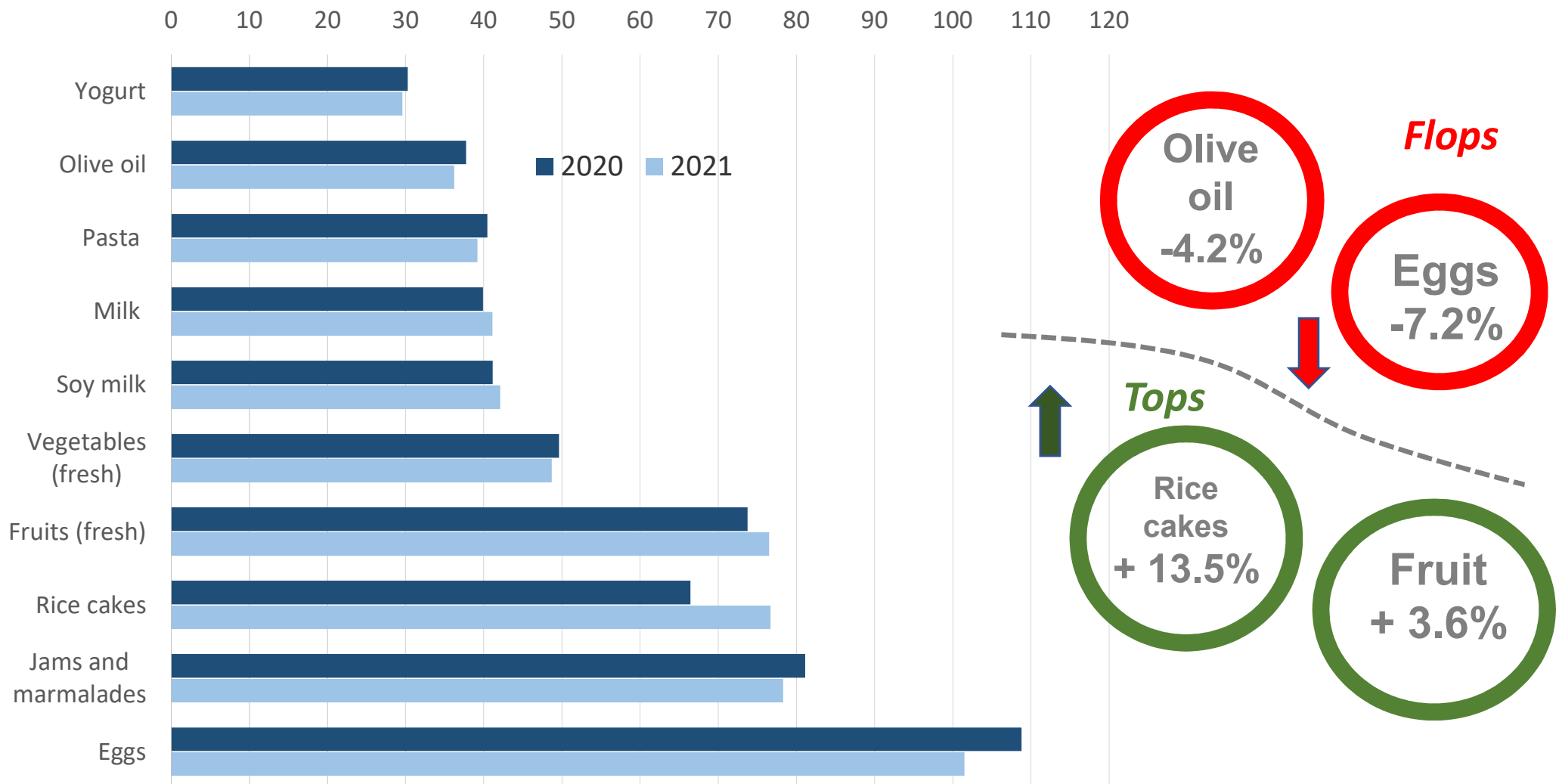
Sign of a slowdown!

* Own estimation based on Osservatorio SANA -Nomisma, 2021



Supermarkets sales (top 10 products in 2021)

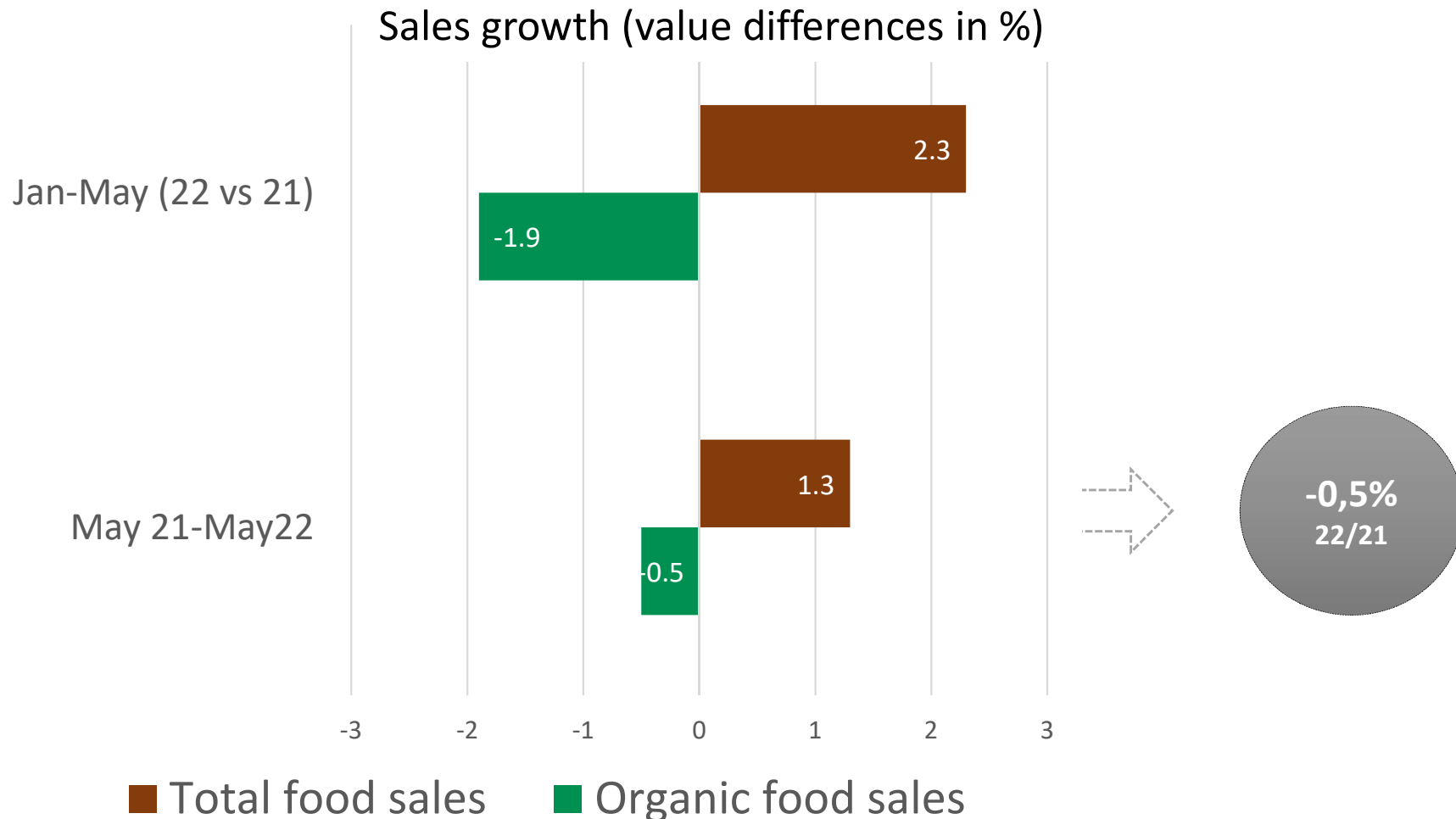
Organic food sales in supermarket (million euro)



* Own estimation based on Osservatorio SANA -Nielsen, 2021



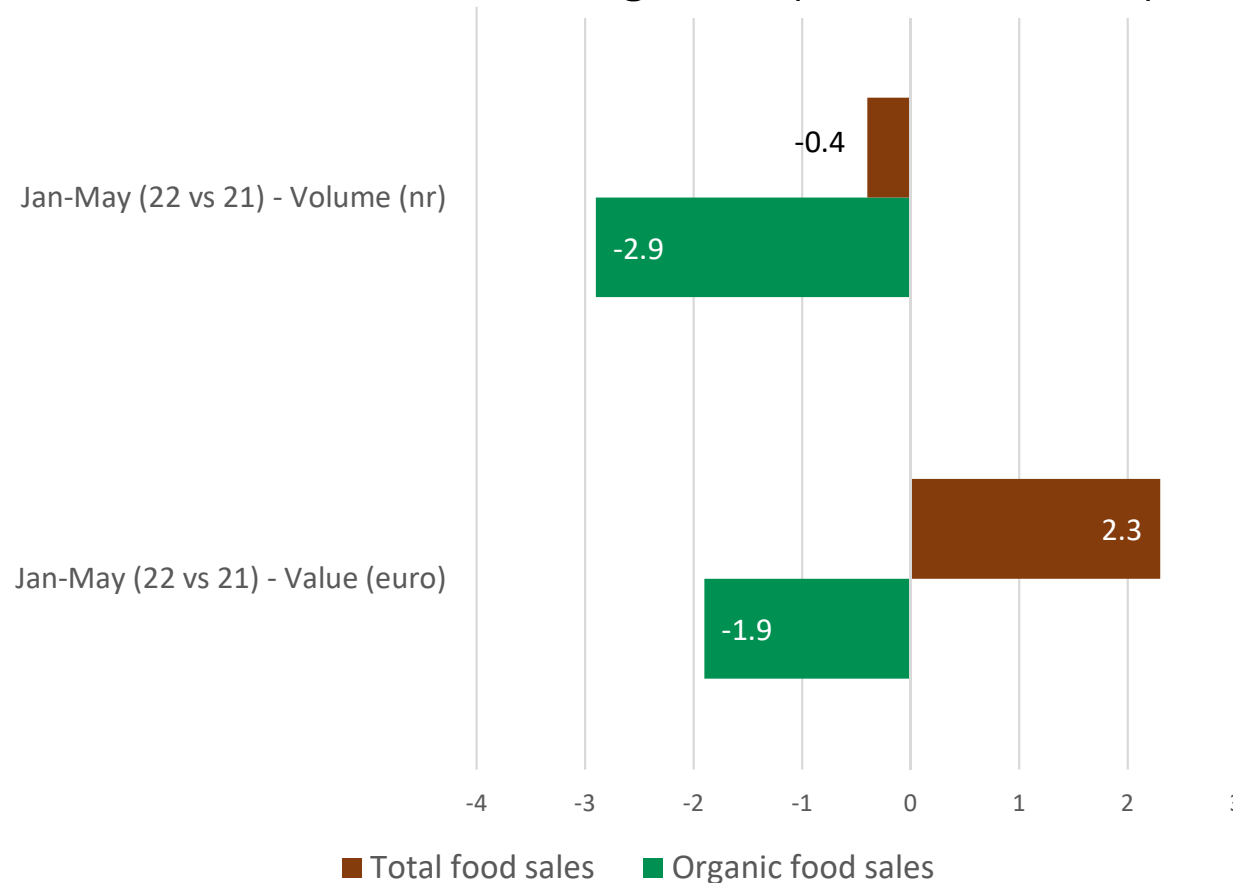
Warning signs of a slowdown in 2022 (*Supermarket & Discount*)





Defferences in price growth!

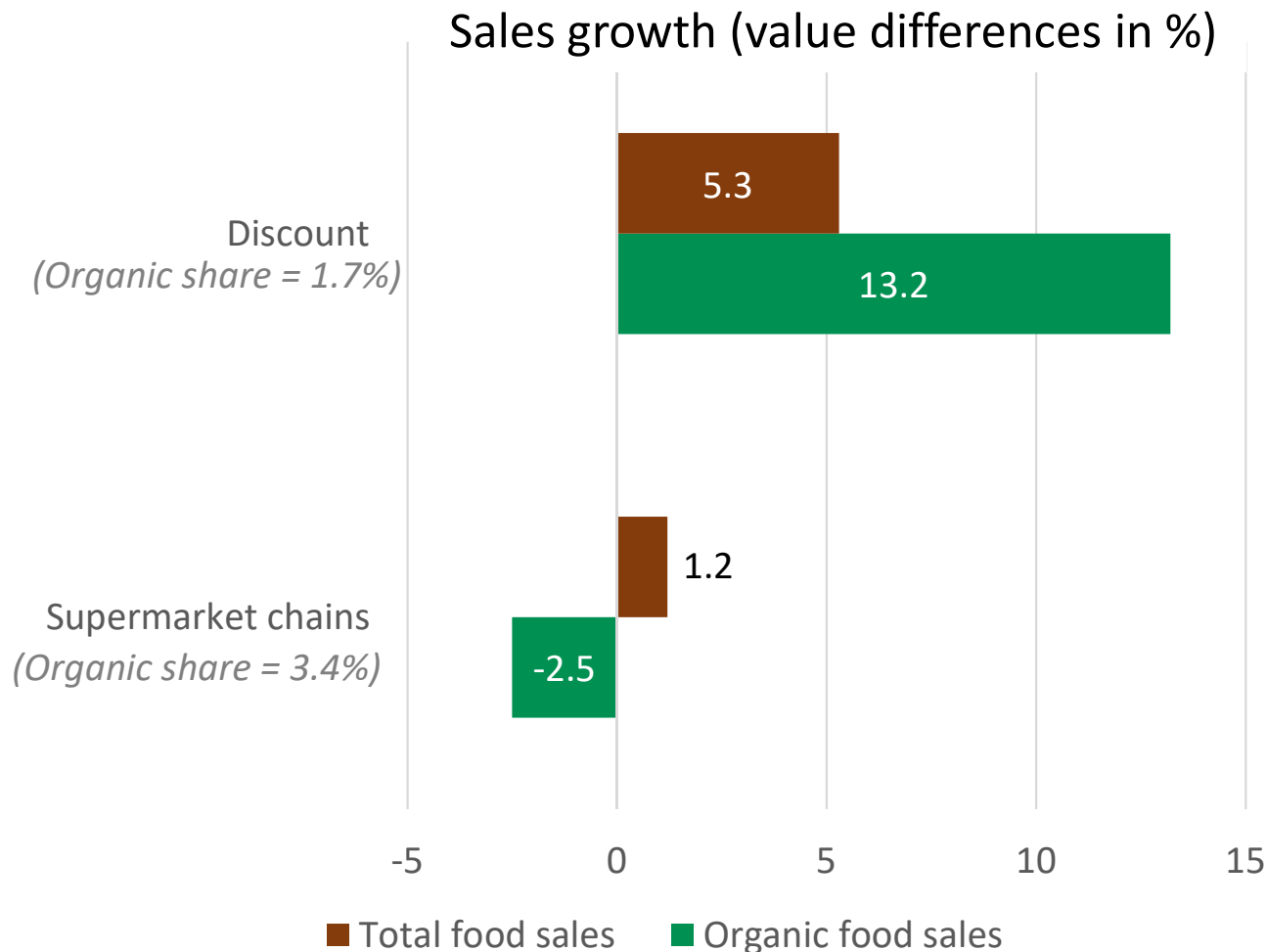
Sales growth (differences in %)



The higher price growth of organic food may partially explain the phenomenon!



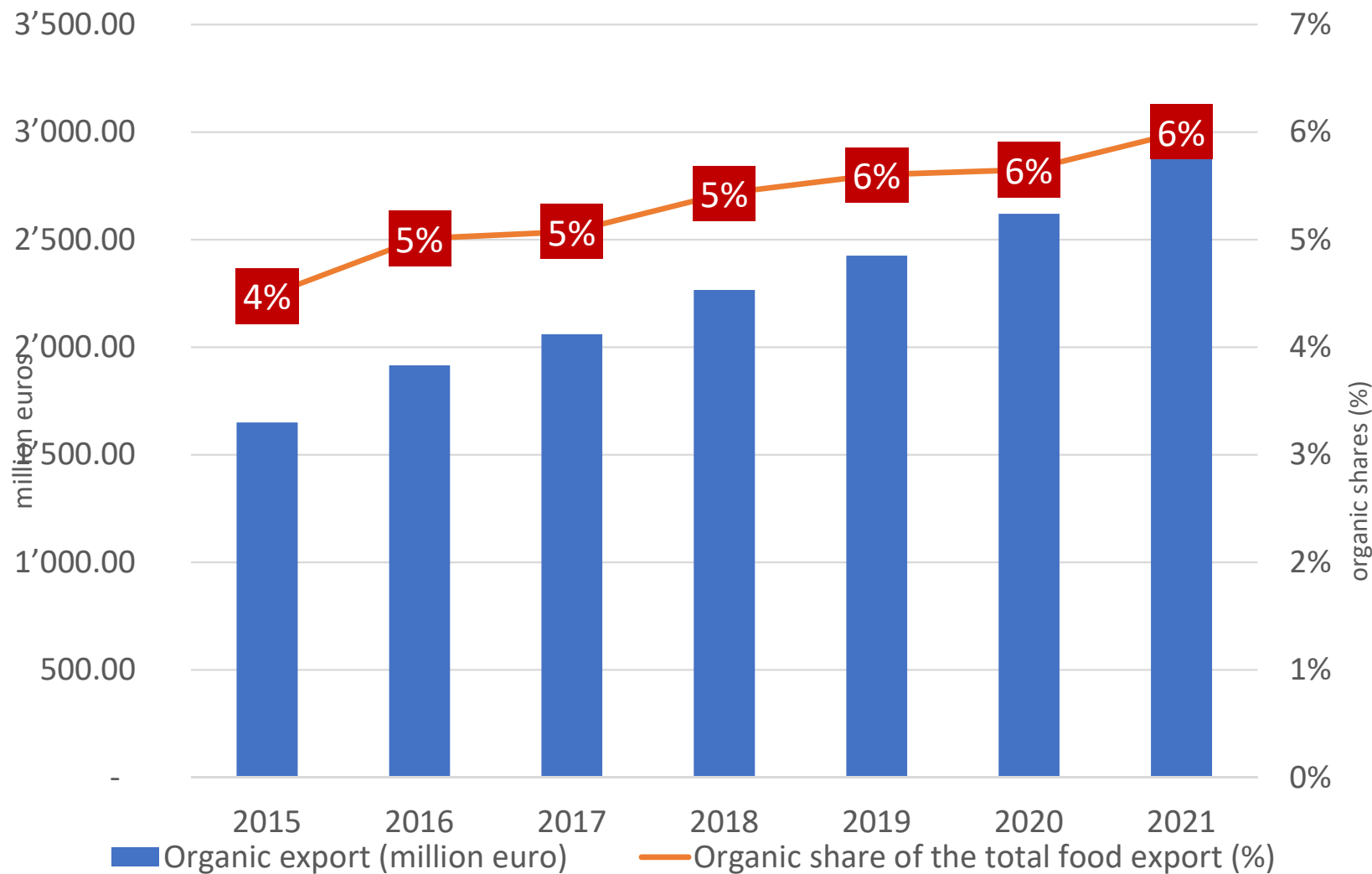
Hard discount is experiencing strong growth!



Hard discount is still a relatively small organic food market player in Italy (about 6% of total organic sales), but over the past years it has displayed strong growth!



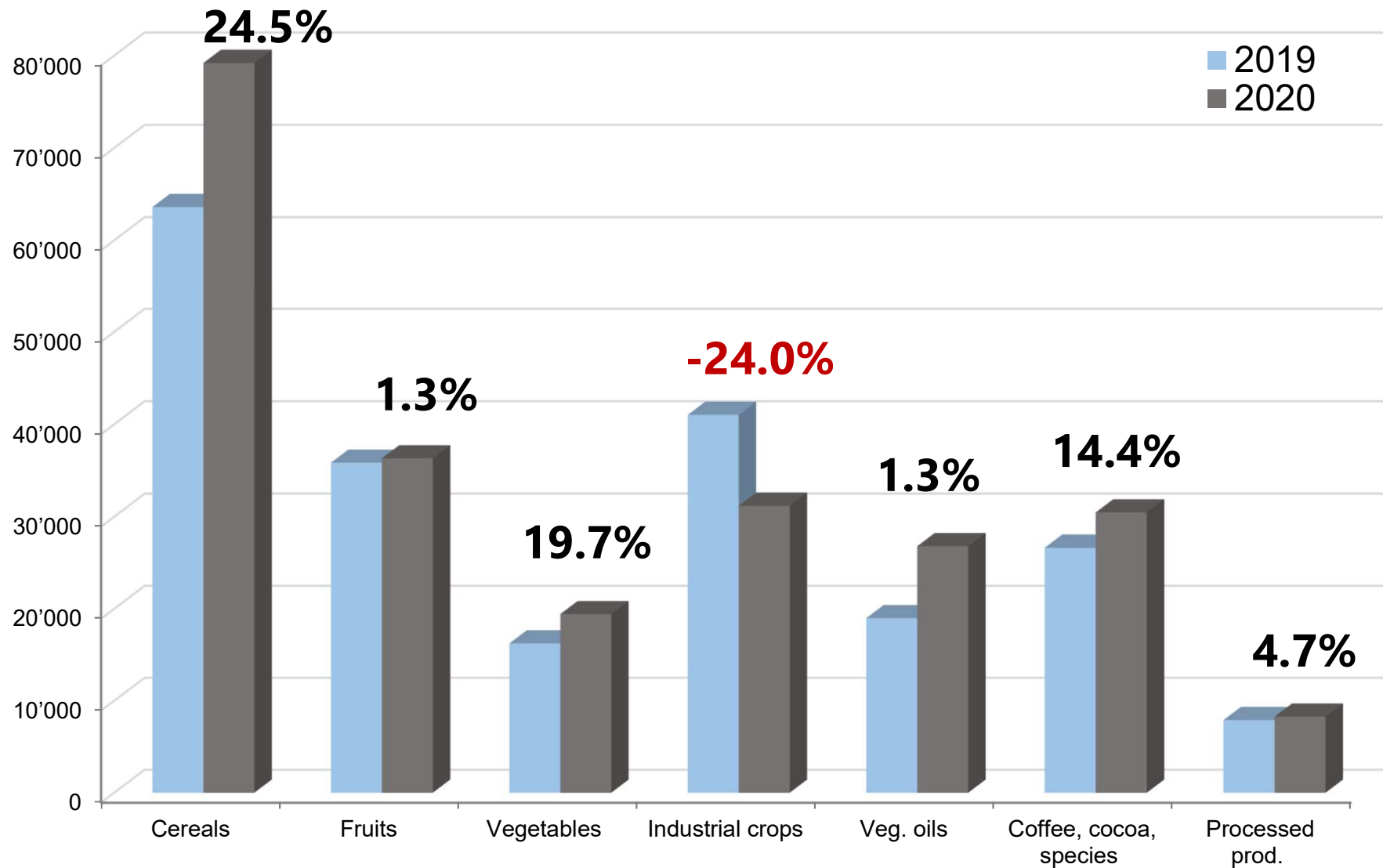
IT organic food export



EXPORT
€ 2.9
BILLION
in 2021



Organic Import by product (2020 vs 2019)





- **Organic land grew at a slower rate than in the past few years.** 2030 is just around the corner, and the 25% organic land target is still quite ambitious!;
- For some crop categories, the domestic **market still relies heavily on imports.** Vertical coordination between agriculture/imports and processing firms in the organic supply chains is needed to avoid supply shortages in the short run.
- Sales of organic food rose sharply in Italy during the Covid-19 lockdown, but **warning signals of market slowdown** come from the first 2022 market data (shift into negative growth);
- The supermarkets still represent about 55% of the IT organic food market, but its structure continues to change, with **discounts increasing their market share (6%; +16%).**



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mipAAF
ministero delle politiche
agricole alimentari e forestali



Thank you !

Contacts and additional info:

Prof. Dr. Raffaele Zanolì
Università Politecnica delle Marche
Via Breccie Bianche
60131 Ancona - Italy
Tel. +39 071 2204929

zanoli@agrecon.univpm.it
www.univpm.it