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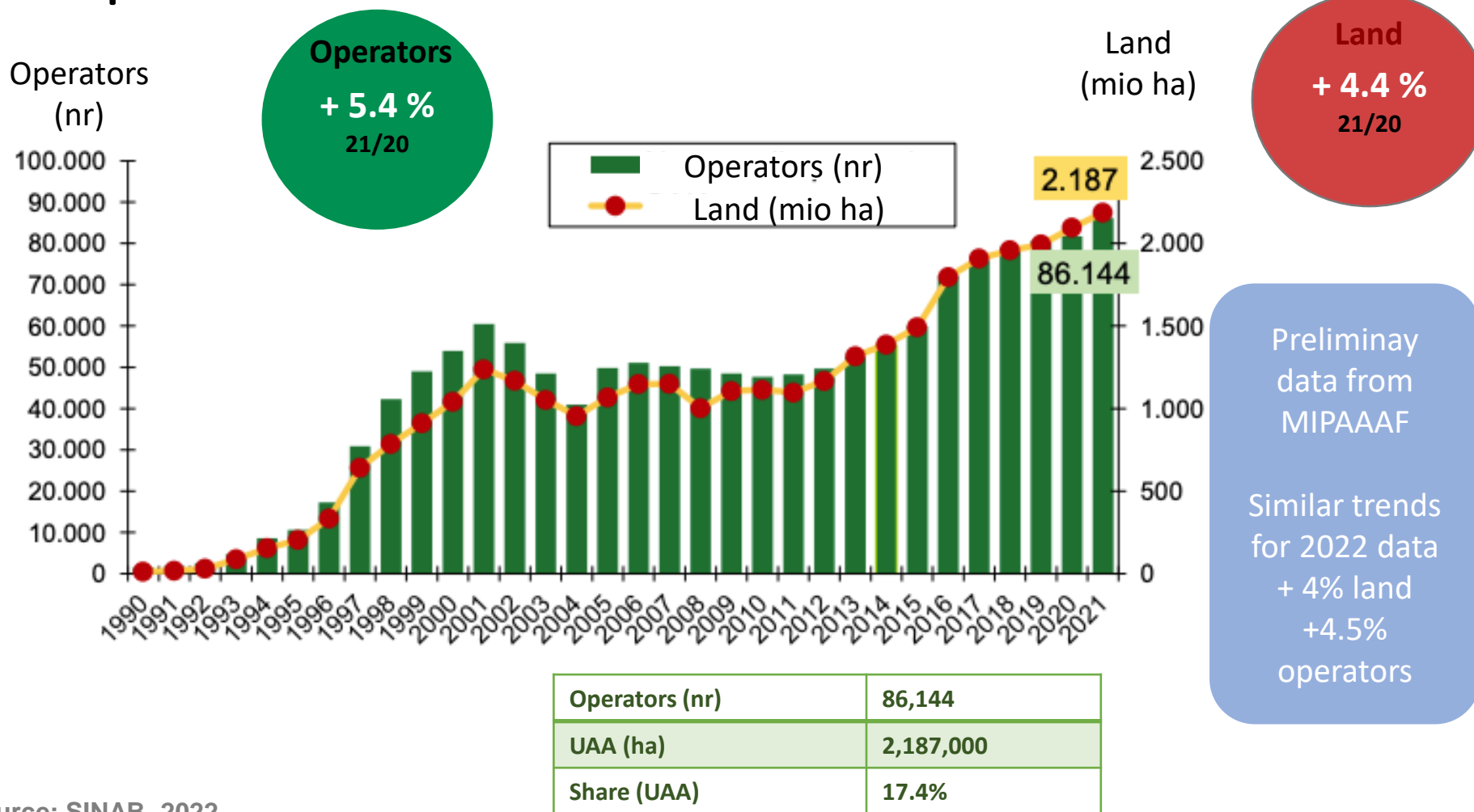
Dipartimento di Scienze Agrarie,  
Alimentari ed Ambientali

# **The Italian Market for Organic Food**

**Nuremberg, Germany 14.02.2023**

Prof. Dr. Raffaele Zanolì

# Development of organic agricultural land and operators 1990-2021





# Organic food sales in Italy, 2022

Total Domestic Sales

€ 4.6 \*

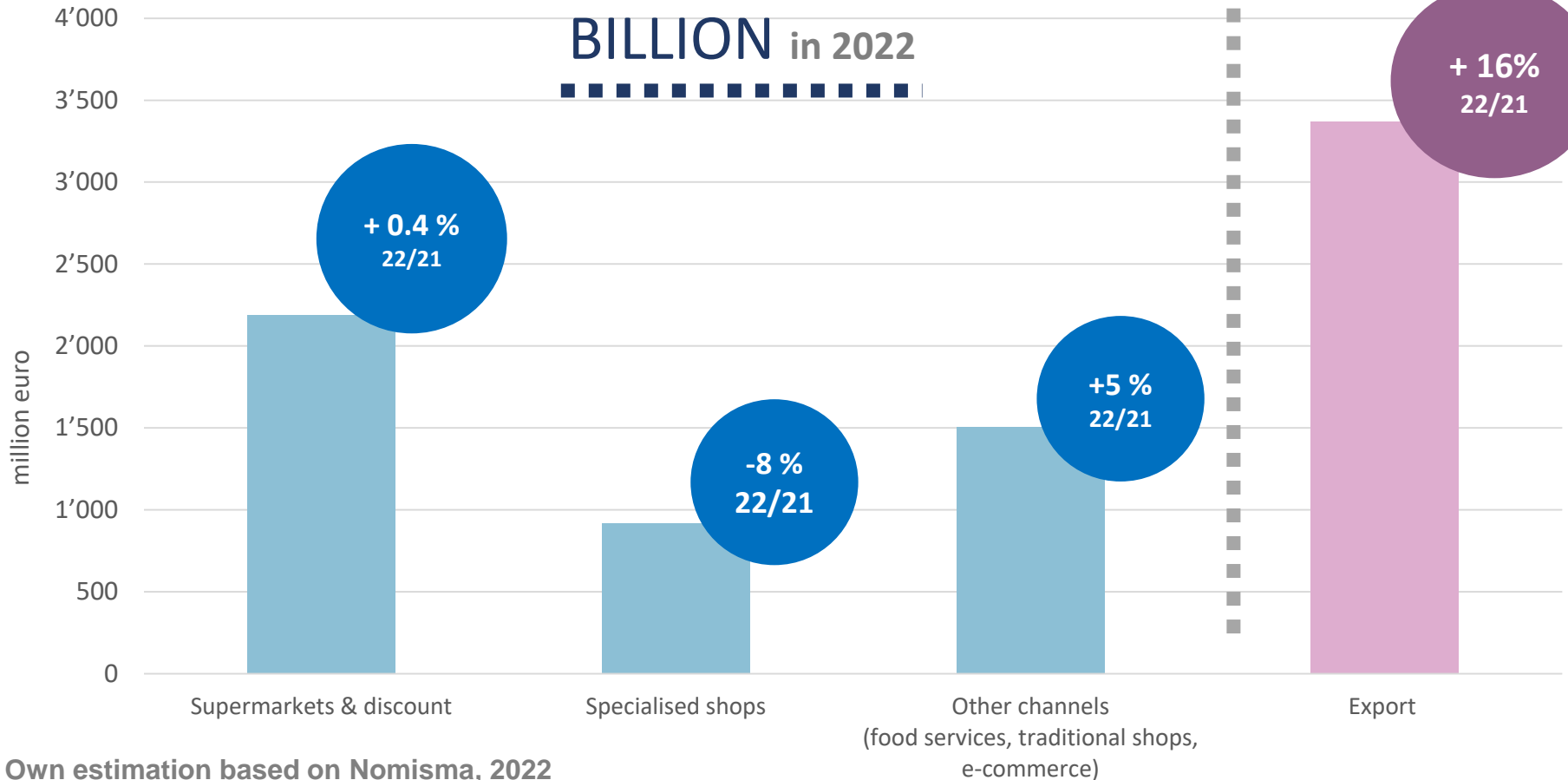
BILLION in 2022

EXPORT \*

€ 3.4

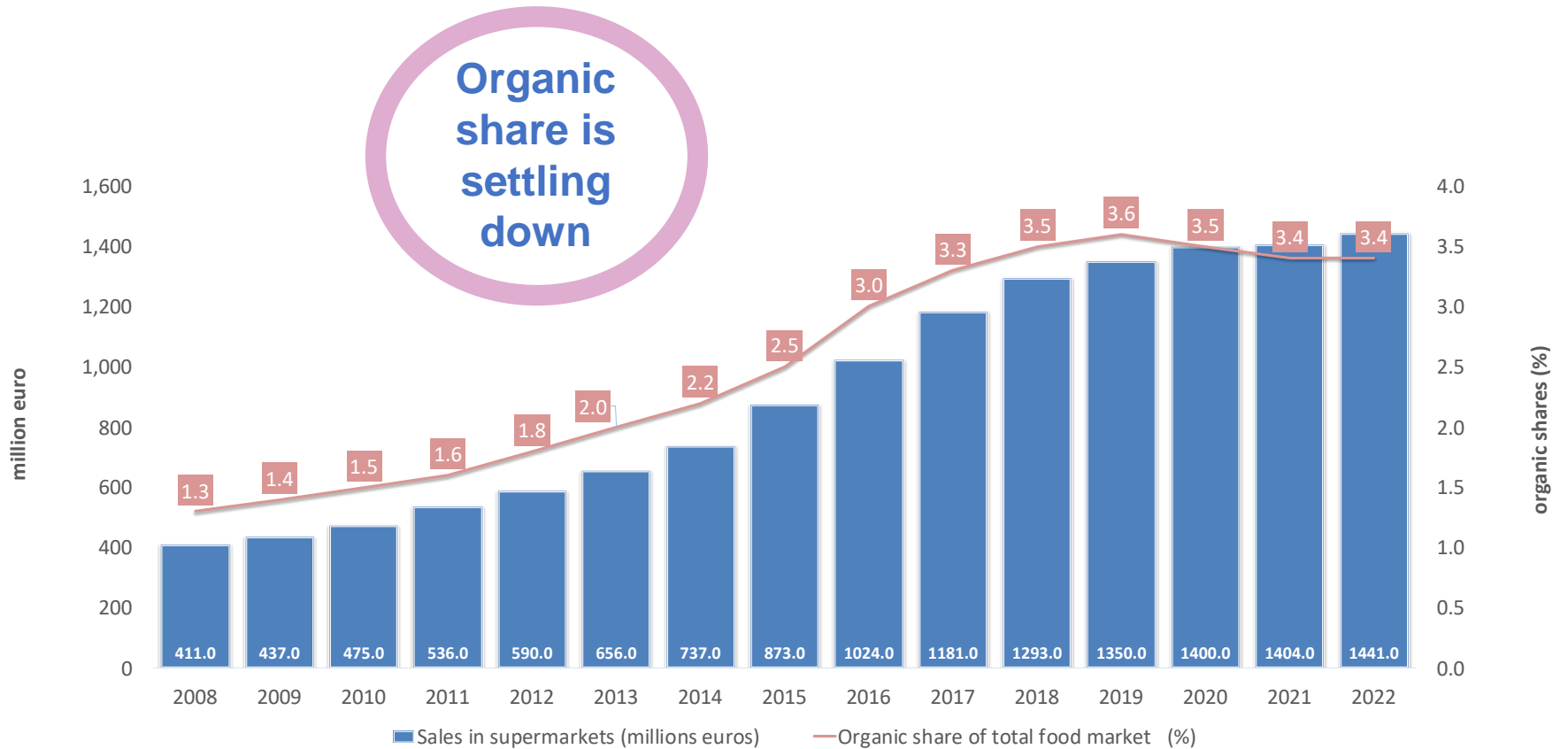
BILLION

in 2022



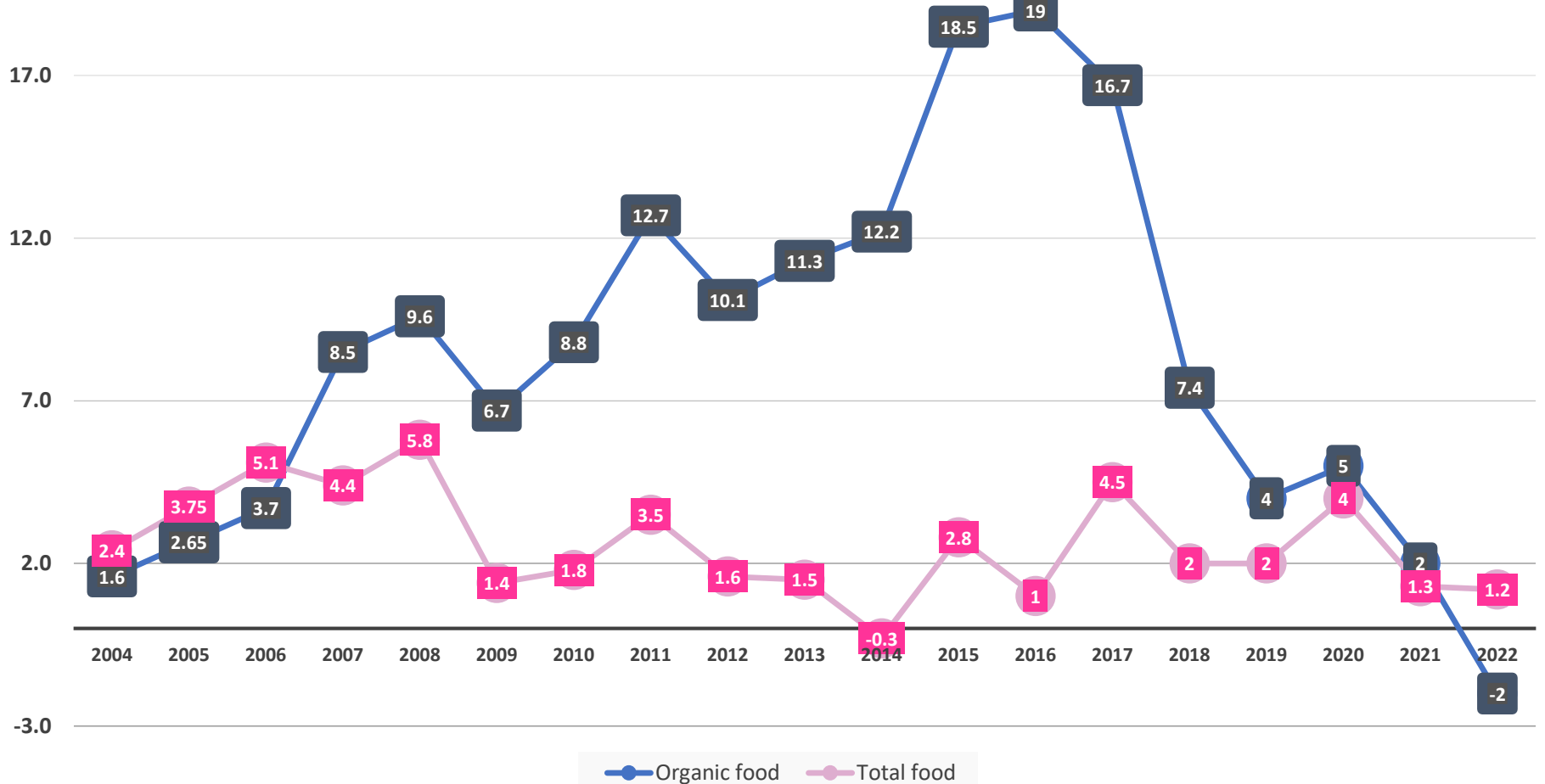
\* Own estimation based on Nomisma, 2022

# Sales values of organic foods in supermarkets



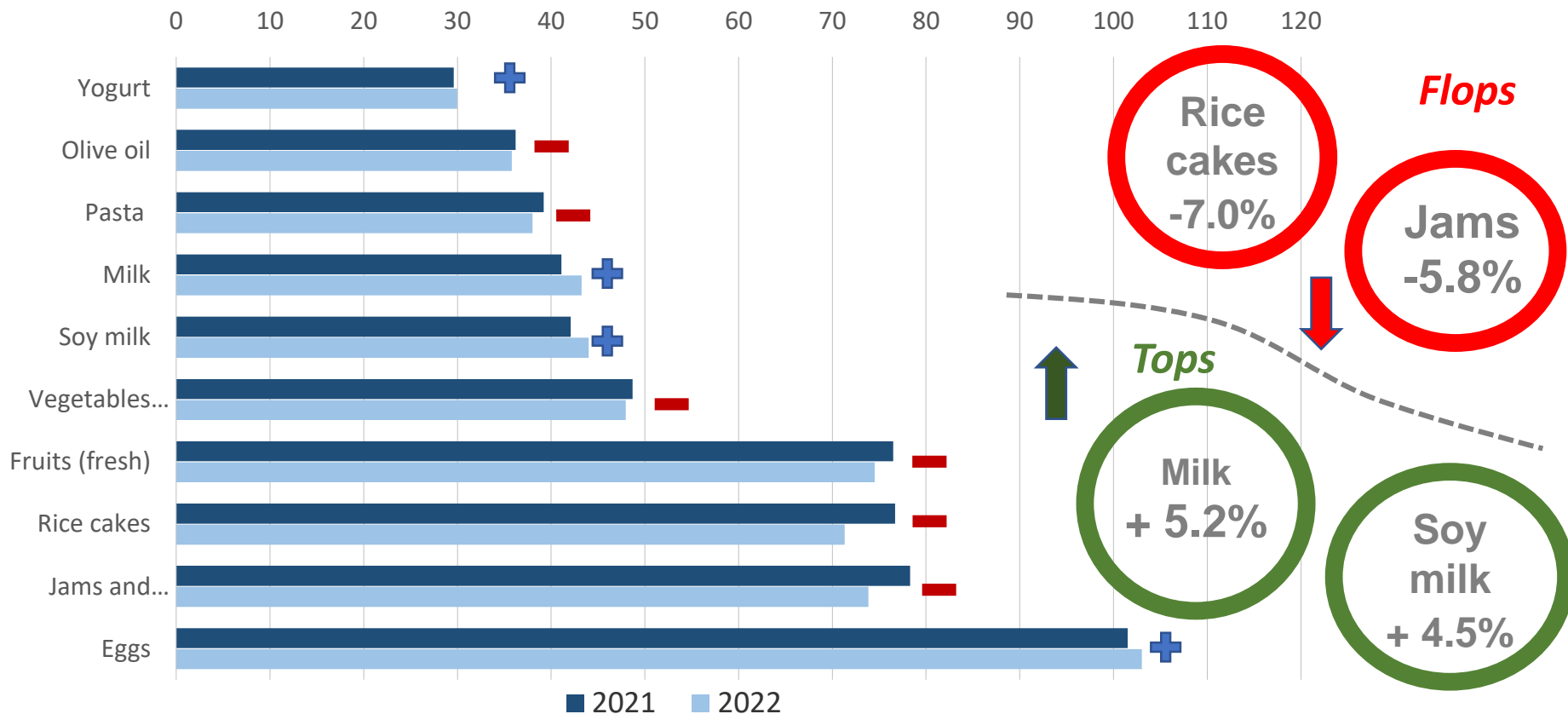
**Sign of a slowdown!**

# Organic and total food growth (%) rate for the sales values in supermarkets



# Supermarkets sales (top 10 products in 2022)

Organic food sales in supermarket (million euro)

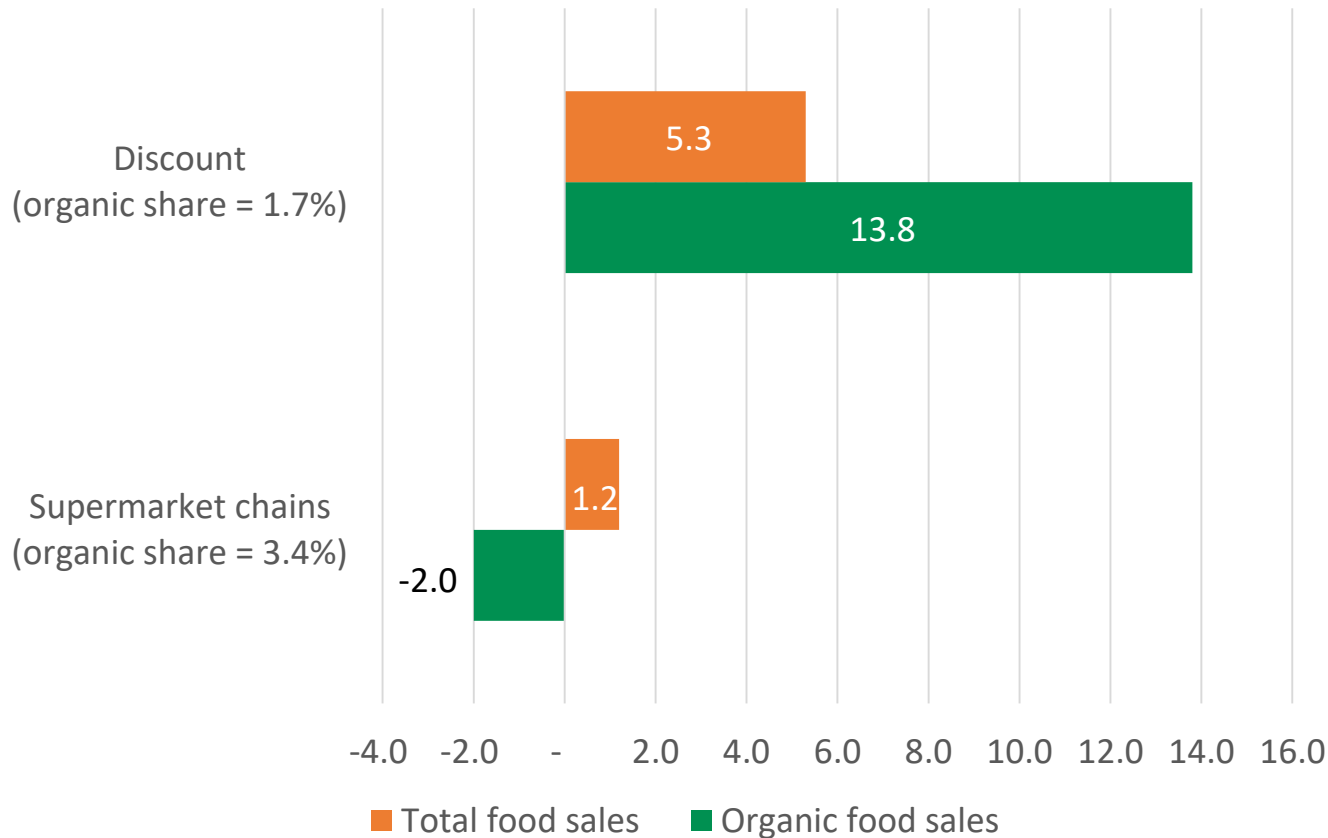


\* Own estimation based on Osservatorio SANA -Nielsen, 2022



# Hard discount is experiencing strong growth!

Sales growth (value differences in %)



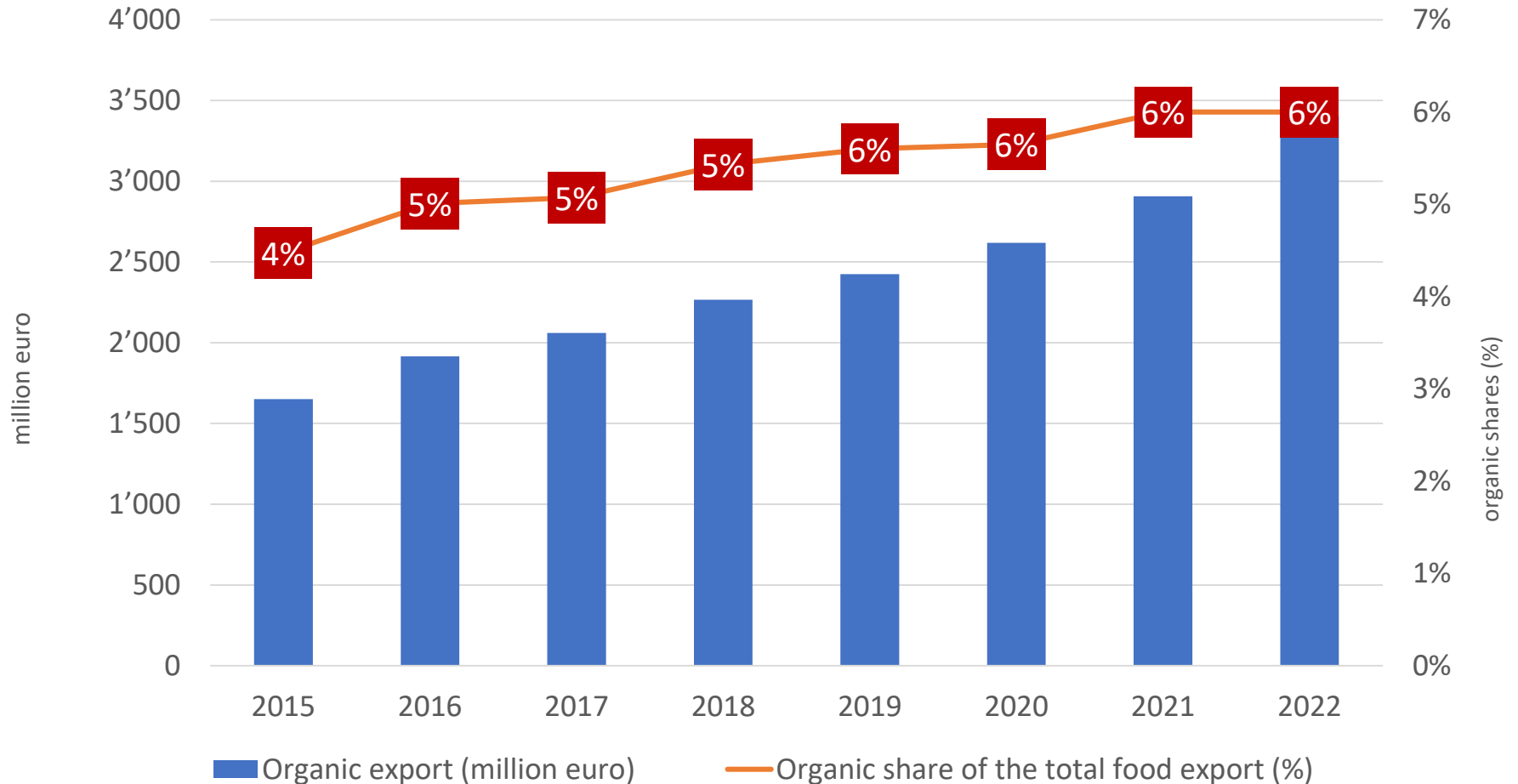
Private market labels represent  
50% of total sales of organic products in supermarkets (+ 2% in 2022)





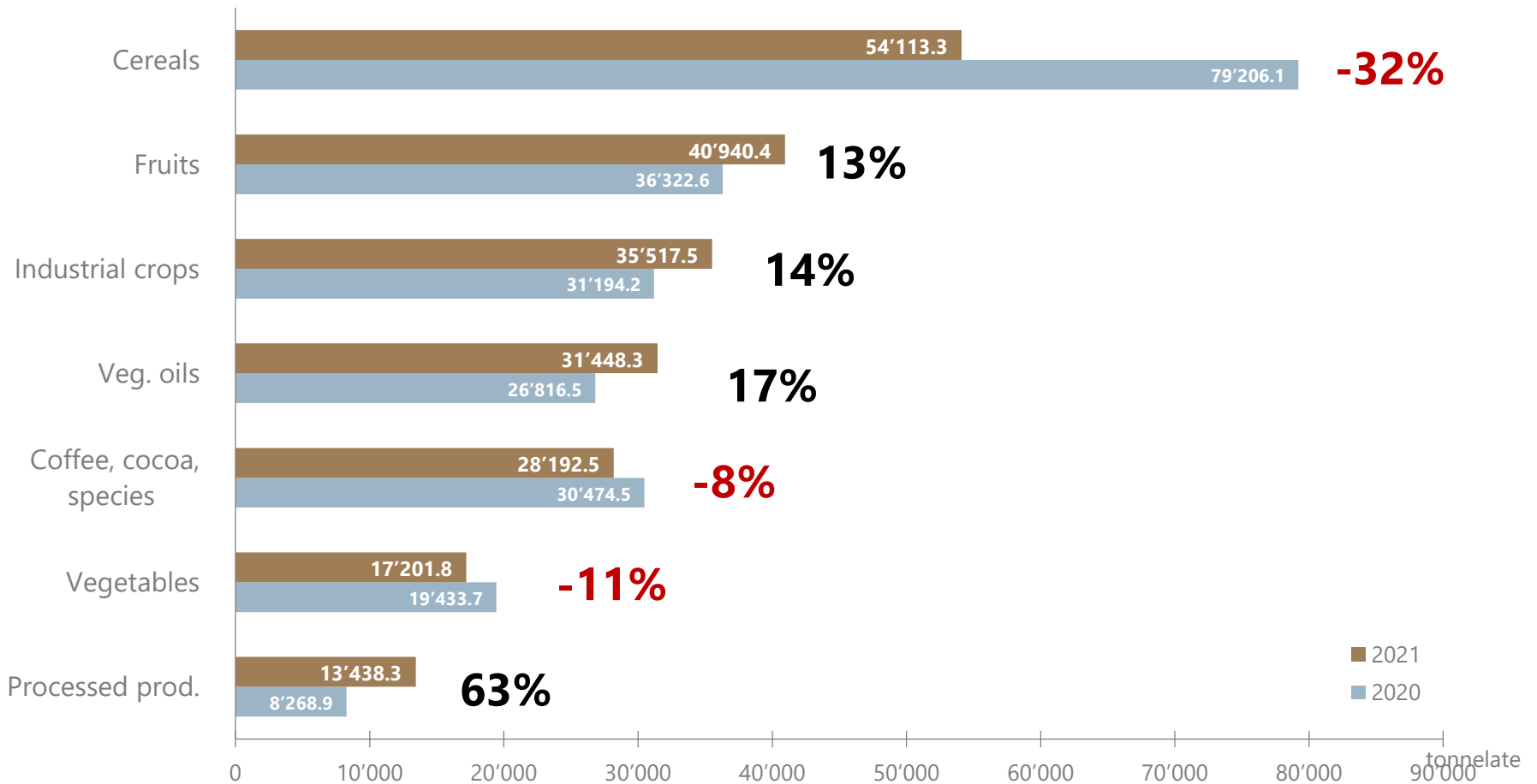


# IT organic food export





# Organic Import by product (2021 vs 2020)





- Organic land grew at about 5%, but to reach the F2F target (25% of organic land in 2030), the organic sector need a **boost!**;
- The domestic market, particularly for what concern cereals and industrial crops, still relies largely on imports
- **Warning signals of market slowdown** come from the market data:
  - (i) shift into negative growth for the specialised shops;
  - (ii) setting down for the supermarkets;
- The supermarkets still represent about 50% of the IT organic food market, but its structure continues to change, with **discounts increasing their market share (6%; +16% in 2022)**.



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The Italian Market for Organic Food



# Thank you !

## Contacts and additional info:

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