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DELLE MARCHE

Dipartimento di Scienze Agrarie,
Alimentari ed Ambientali

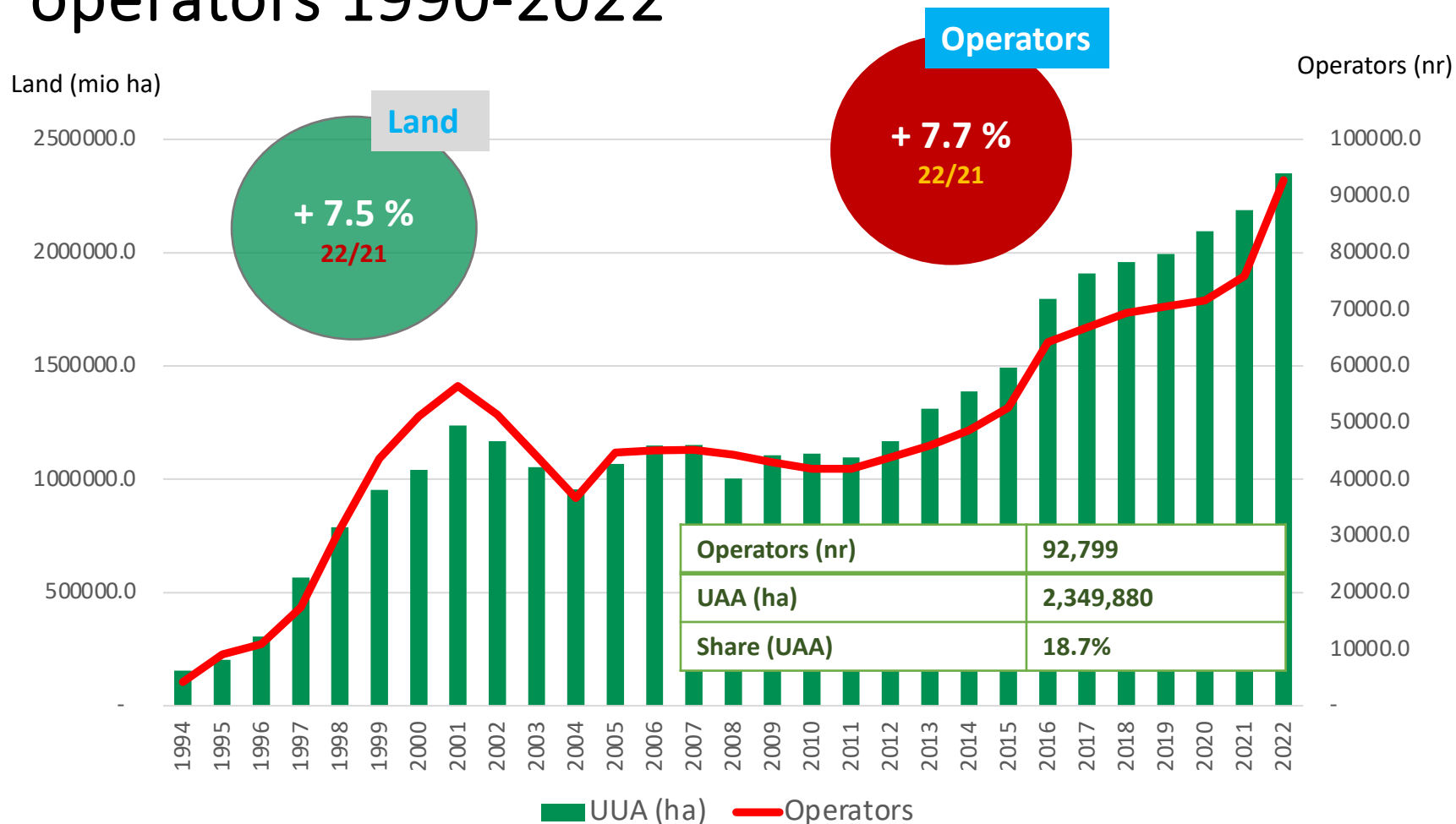
The Italian Market for Organic Food

Nuremberg, Germany 13.02.2024

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Prof. Dr. Francesco Solfanelli



Development of organic agricultural land and operators 1990-2022





Organic food sales in Italy, 2023

Total Domestic Sales

€ 5.5 *

BILLION in 2023

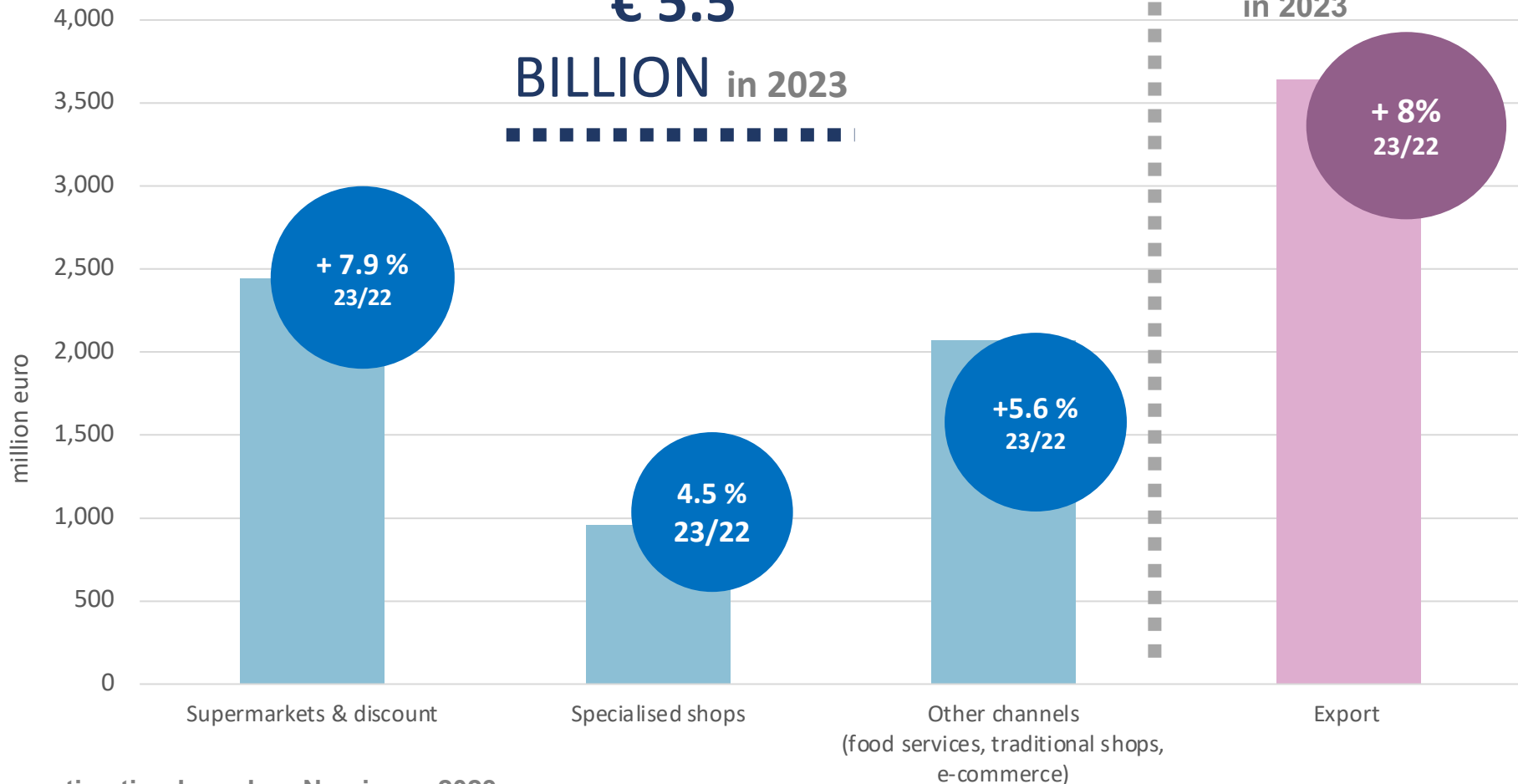


EXPORT *

€ 3.6

BILLION

in 2023



+ 8%
23/22

+ 7.9 %
23/22

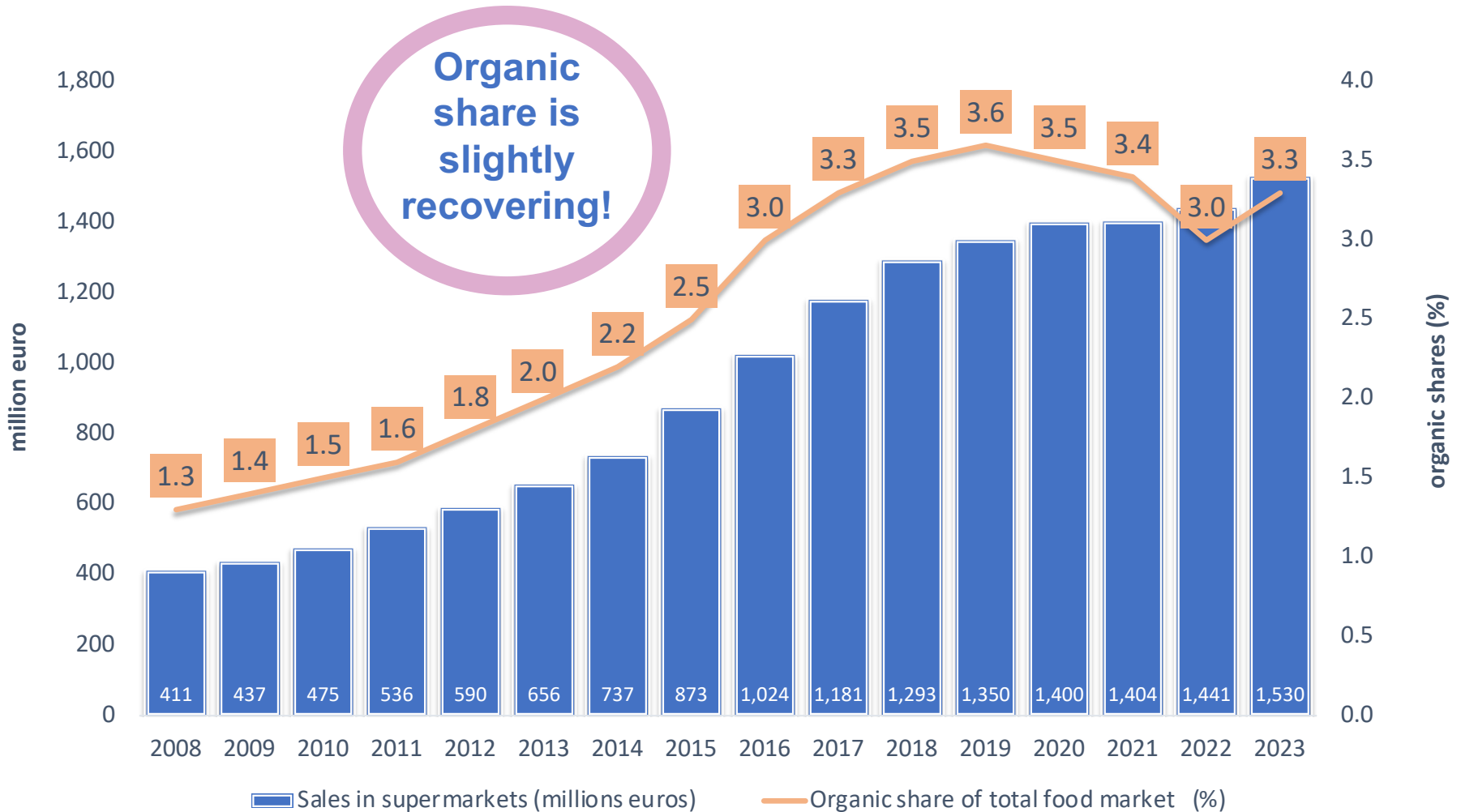
4.5 %
23/22

+ 5.6 %
23/22

* Own estimation based on Nomisma, 2023



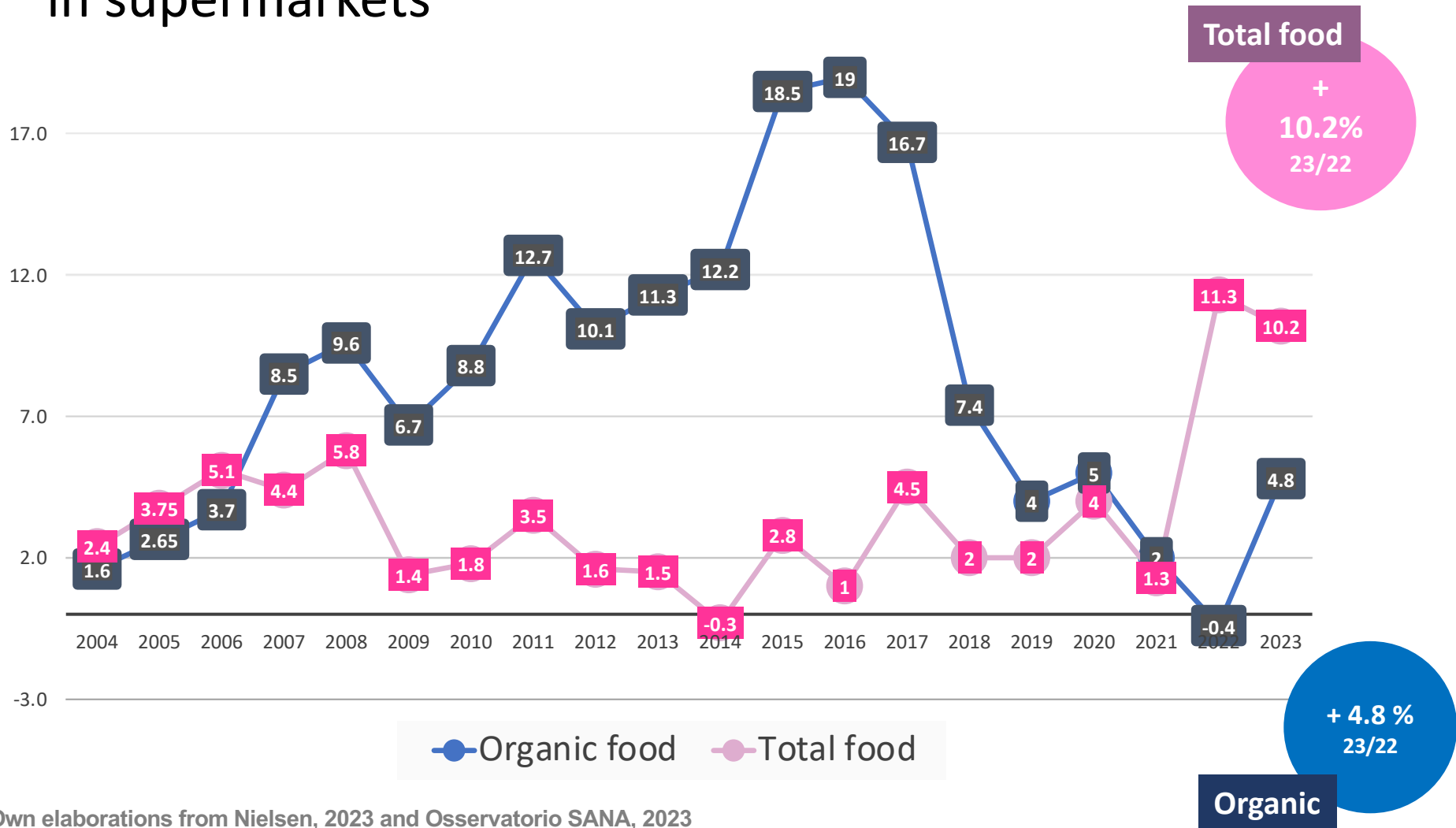
Sales values of organic foods in supermarkets in 2023



* Own elaborations from Nielsen, 2023



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

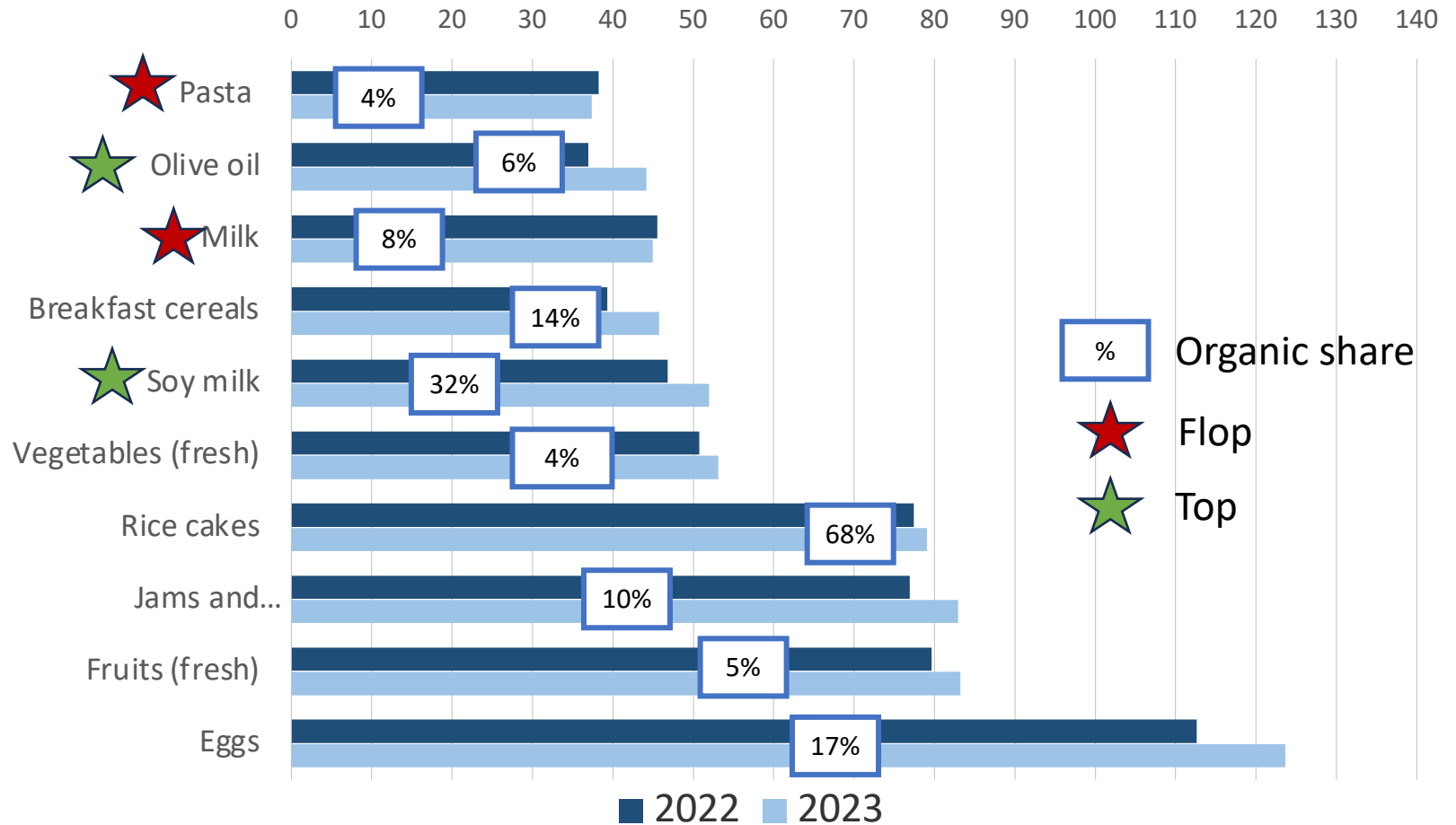


* Own elaborations from Nielsen, 2023 and Osservatorio SANA, 2023



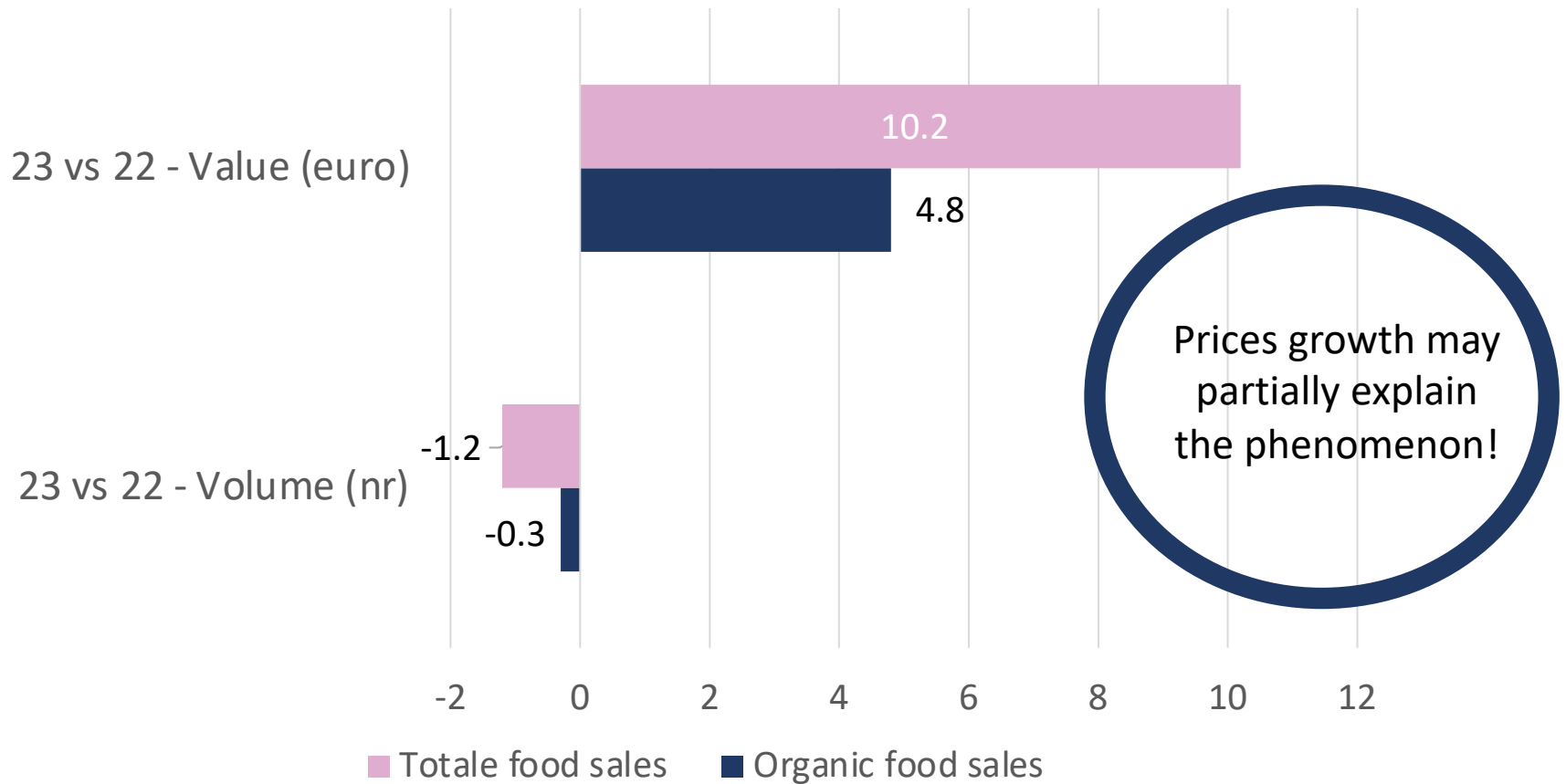
Supermarkets sales (top 10 products)

Organic food sales in supermarket (million euro)



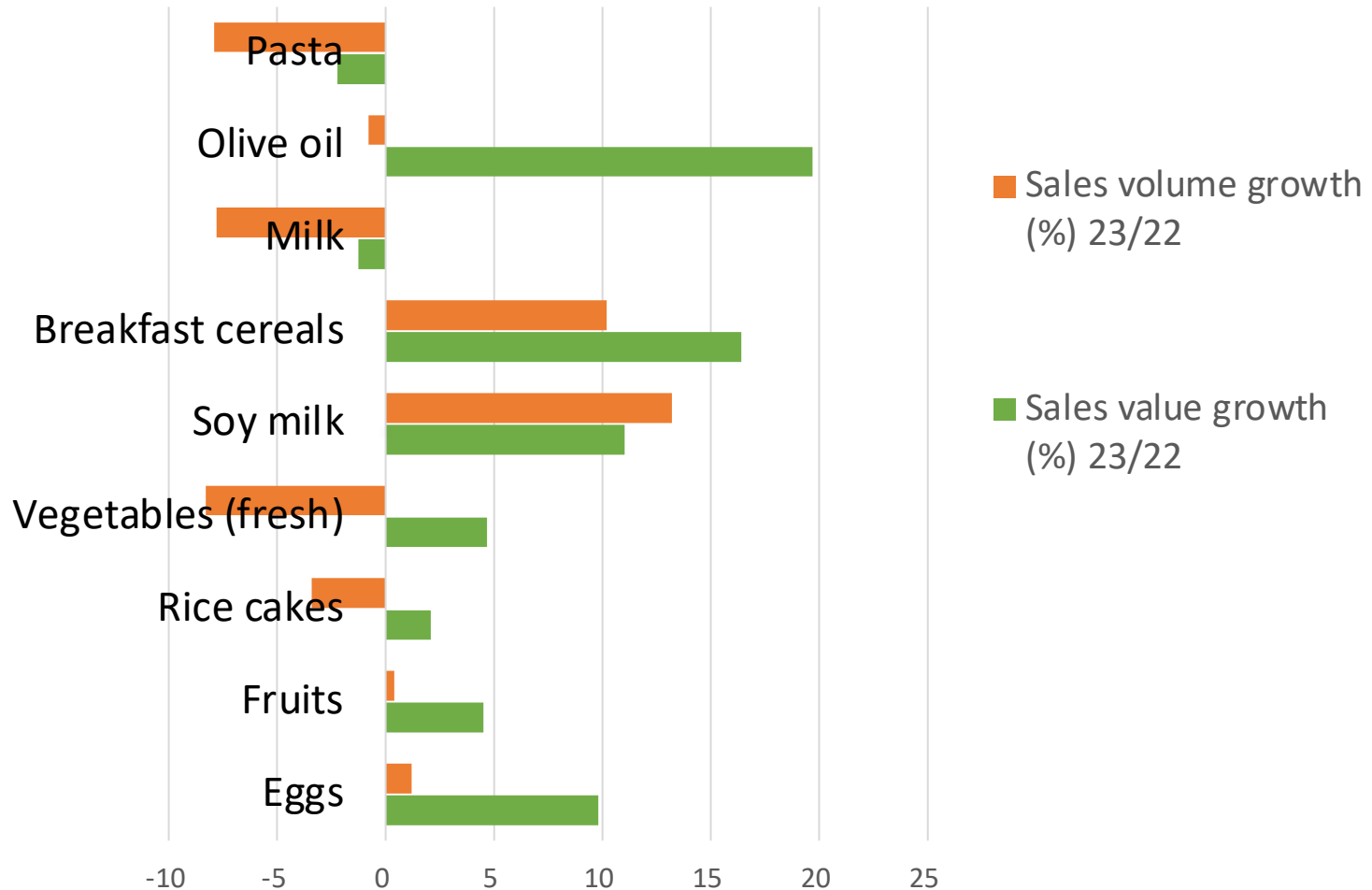


Volume and value sales growth (differences in %)





Volume and value sales growth (differences in %) Supermarkets sales (top 10 products)





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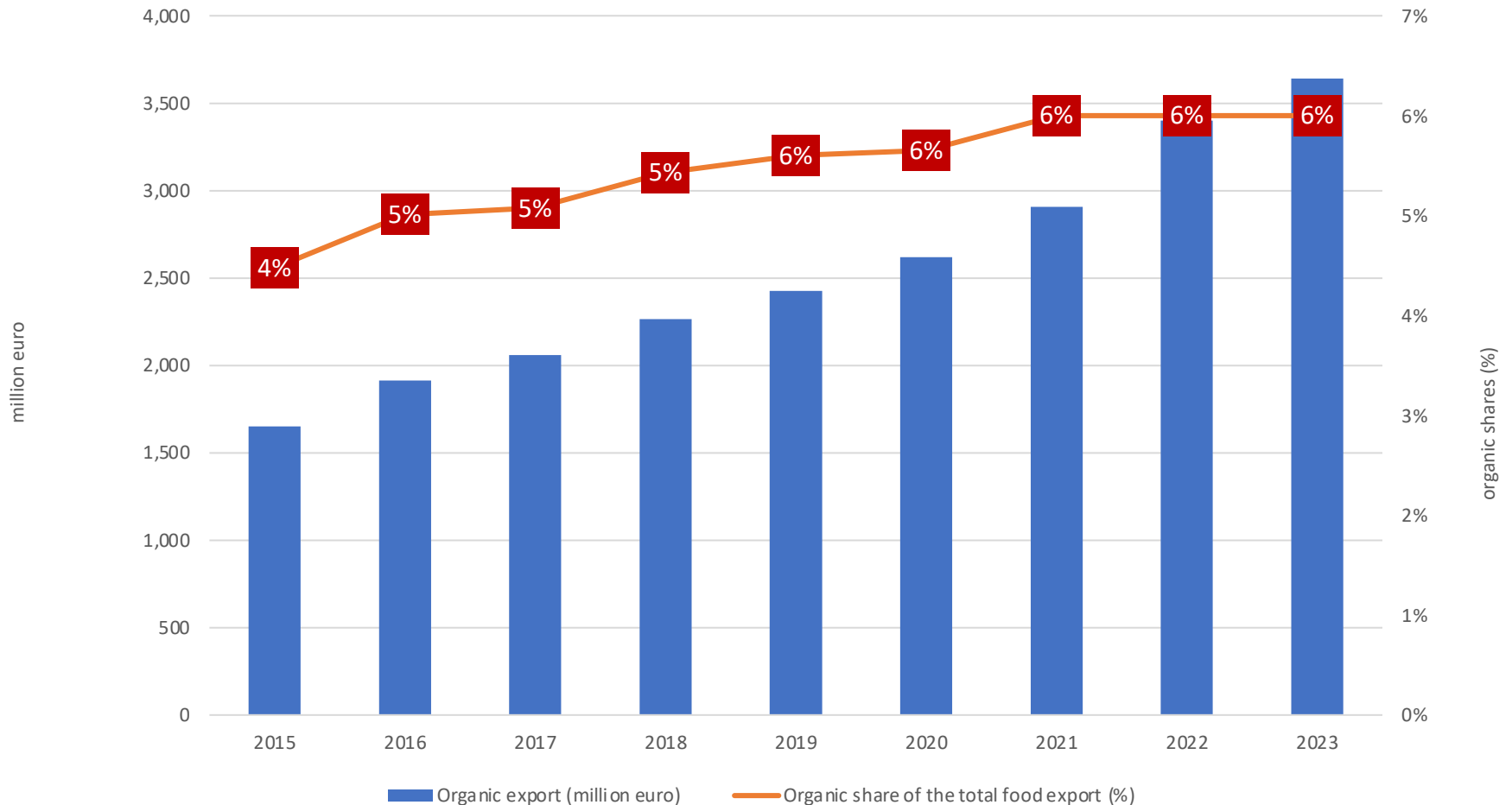
EXPORT

€ 3.6

BILLION

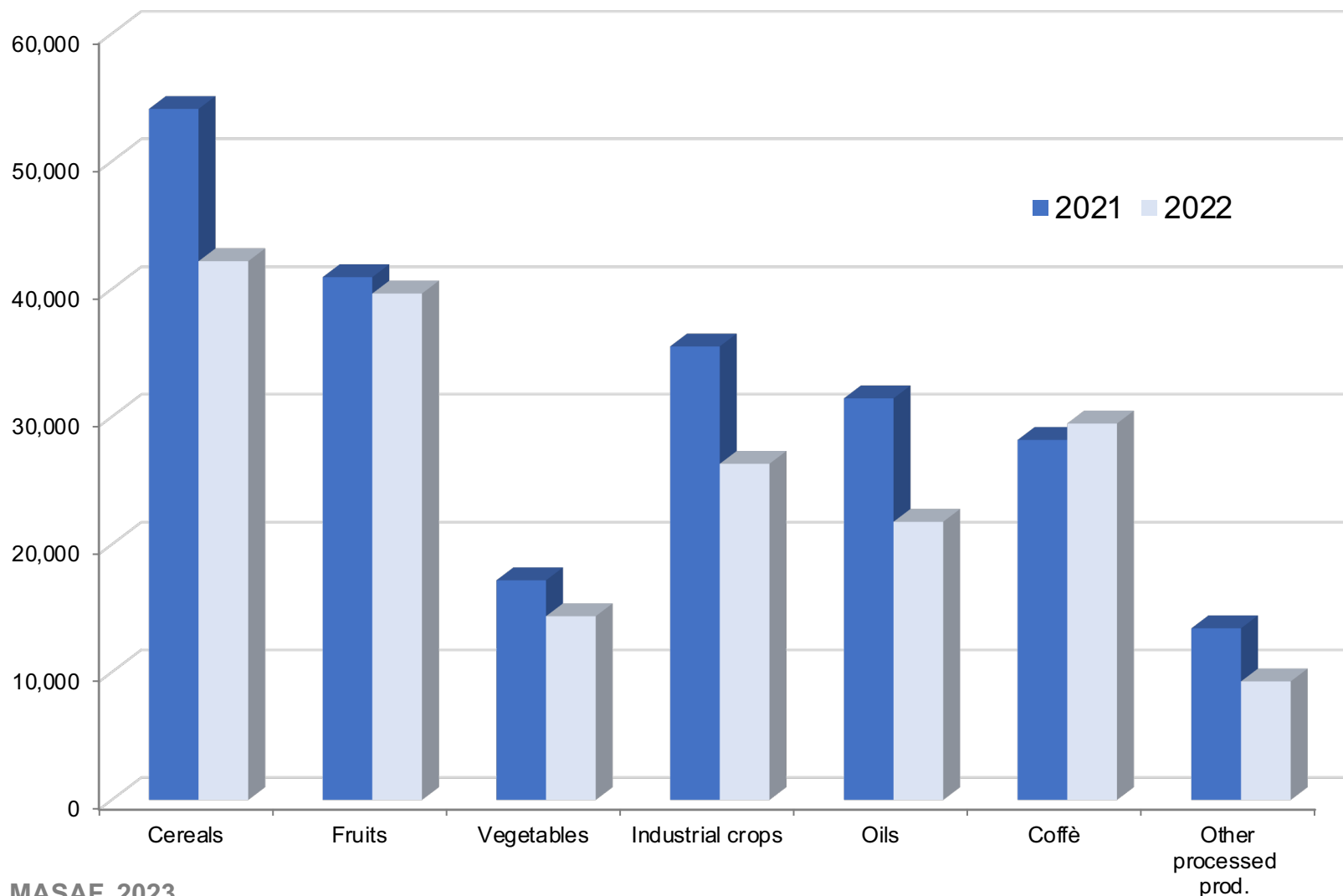
in 2023

IT organic food export





Organic Import by product (2022 vs 2021)





Conclusions

- Organic land and operators grew at about 7.5. However, to reach the F2F target there is a need for a **strong acceleration**;
- **Signals of market recovery** come from both supermarkets and specialised shops, but, most of the value growth in 2023 was due to price growth;
- The supermarkets represent about 45% of the IT organic food market, but its structure continues to change:
 - organic market growth is lower than total food market growth in term of value (-5.4%), but not in volume (+0.9%);
 - discounts increase their market share (about 6% of large retail sales);
 - For the first time the assortment of organic products in supermarket has decreased
- As the organic land is increasing, IT is becoming less dependent on imports, particularly for products such as cereals and industrial crops.



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Thank you !

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