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Alimentari ed Ambientali

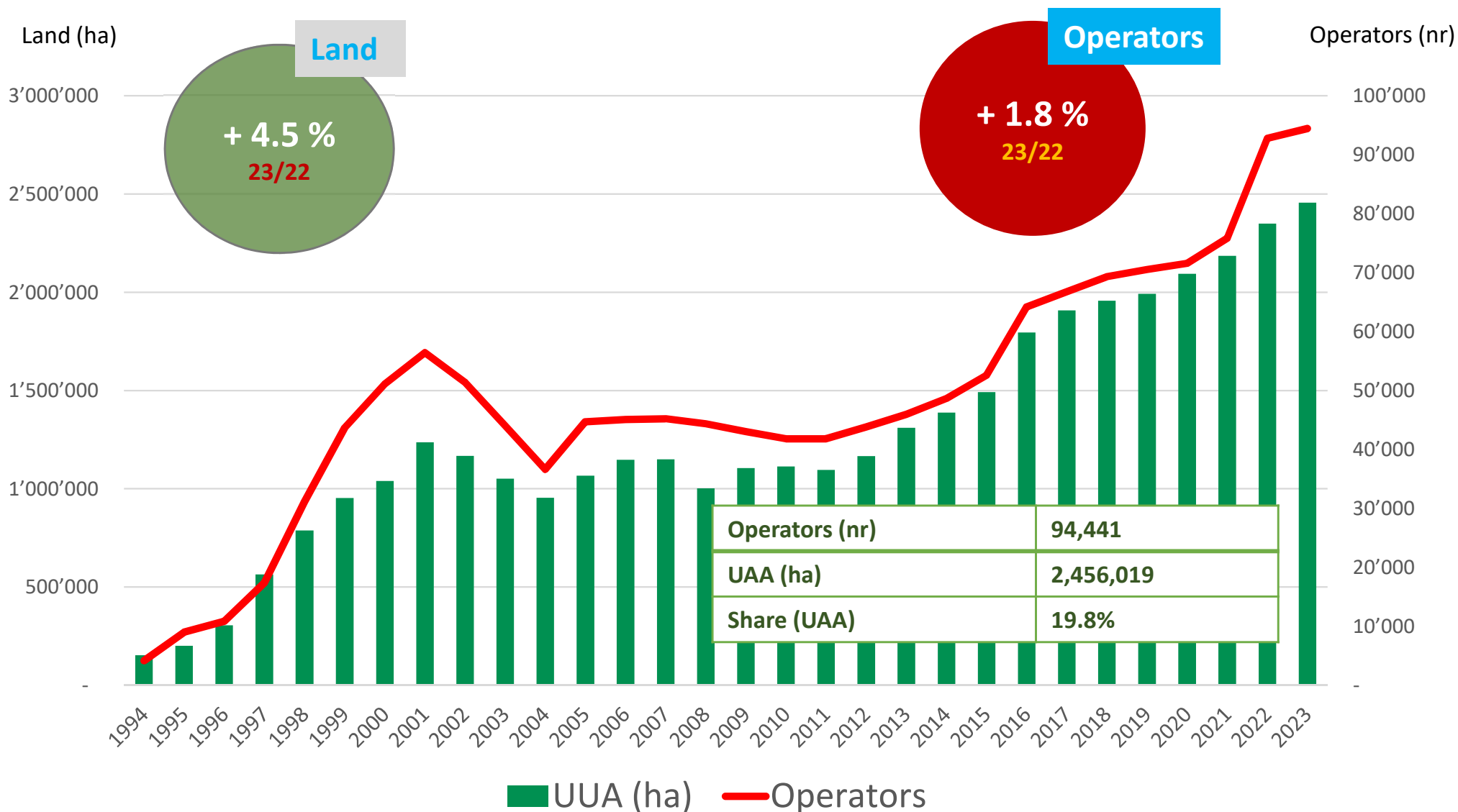
The Italian Market for Organic Food

Nuremberg, Germany 12.02.2025

Prof. Dr. Raffaele Zanolì & Prof. Dr. Francesco Solfanelli

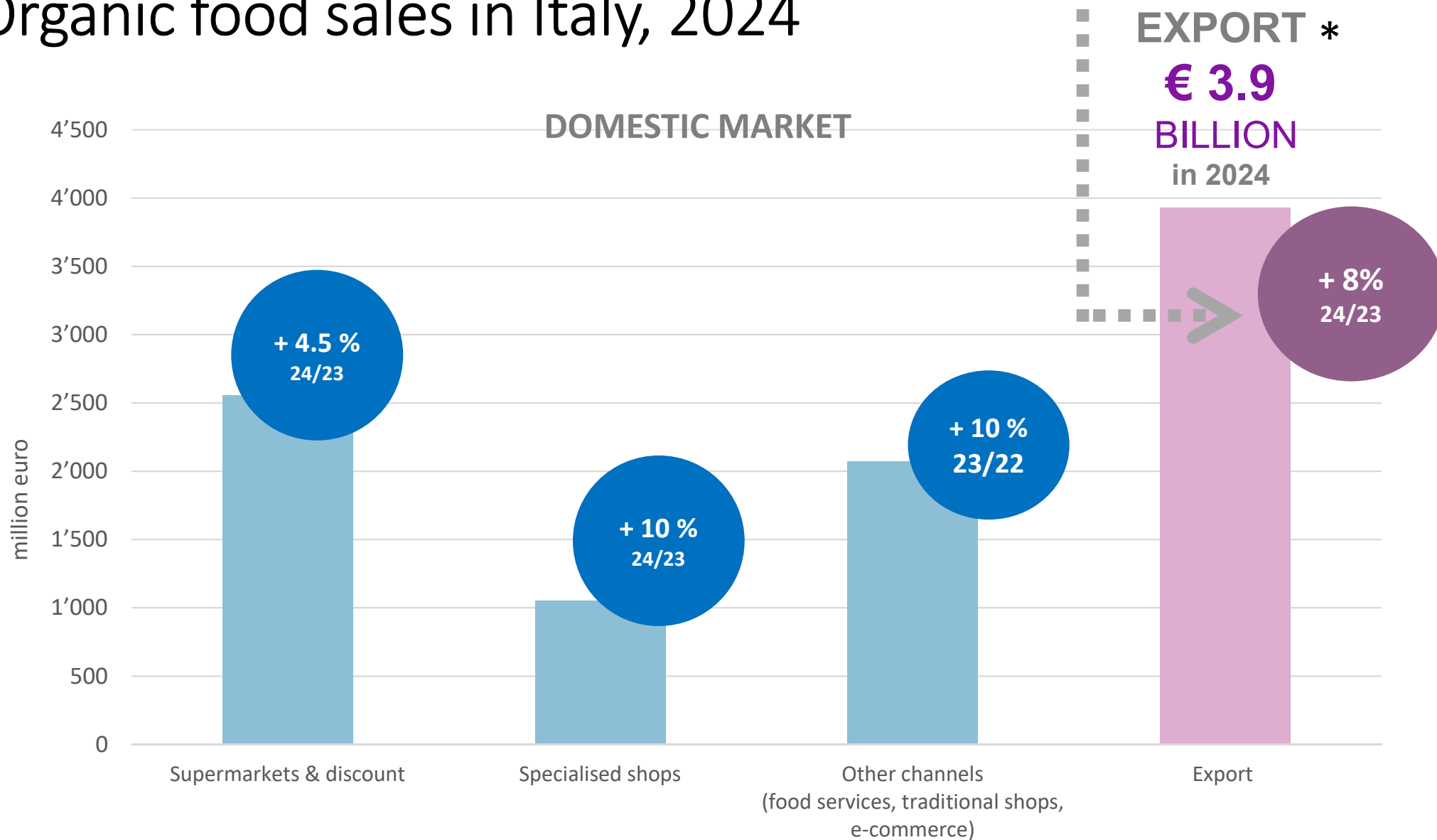


Development of organic agricultural land and operators 1990-2023



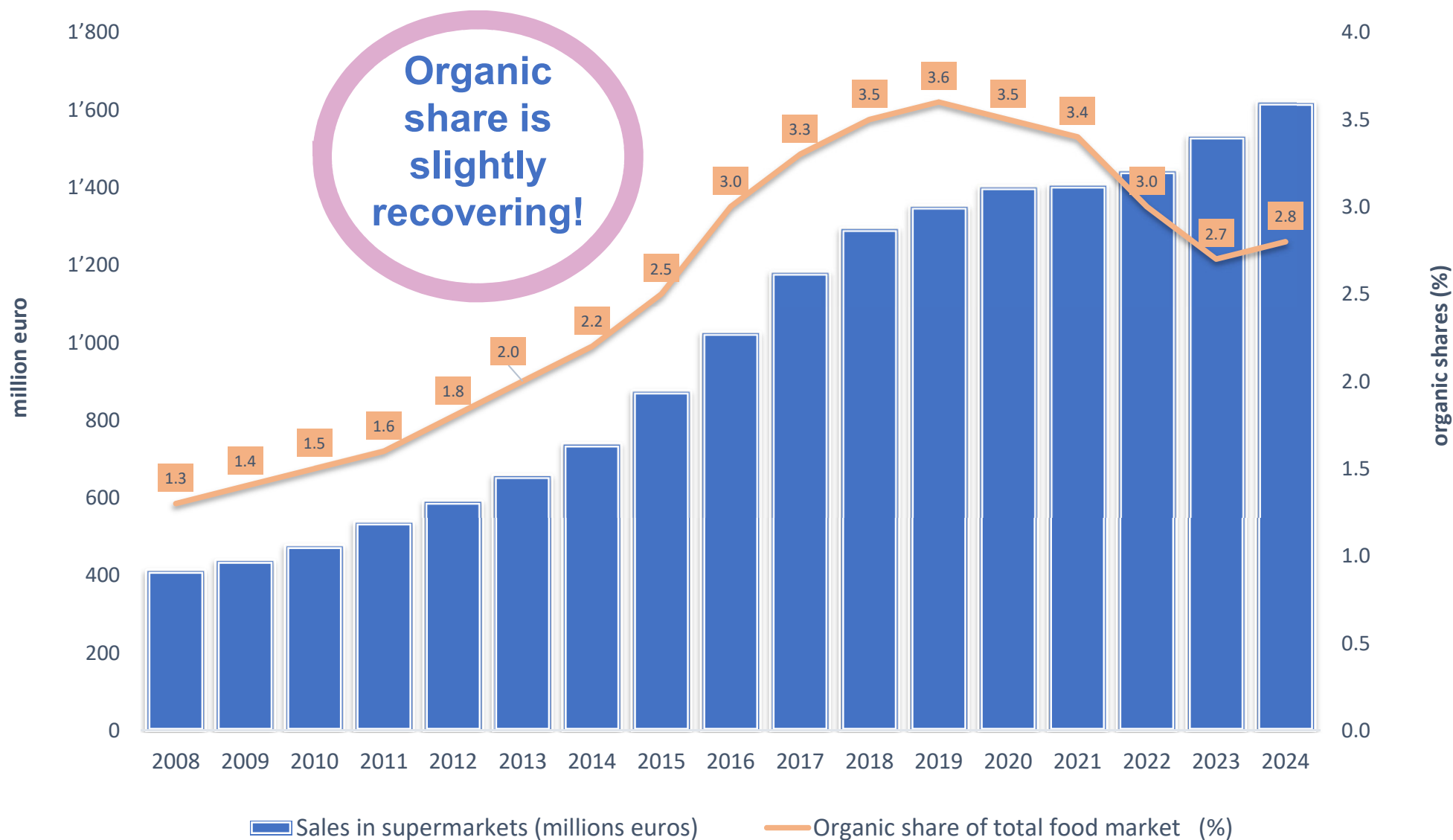


Organic food sales in Italy, 2024



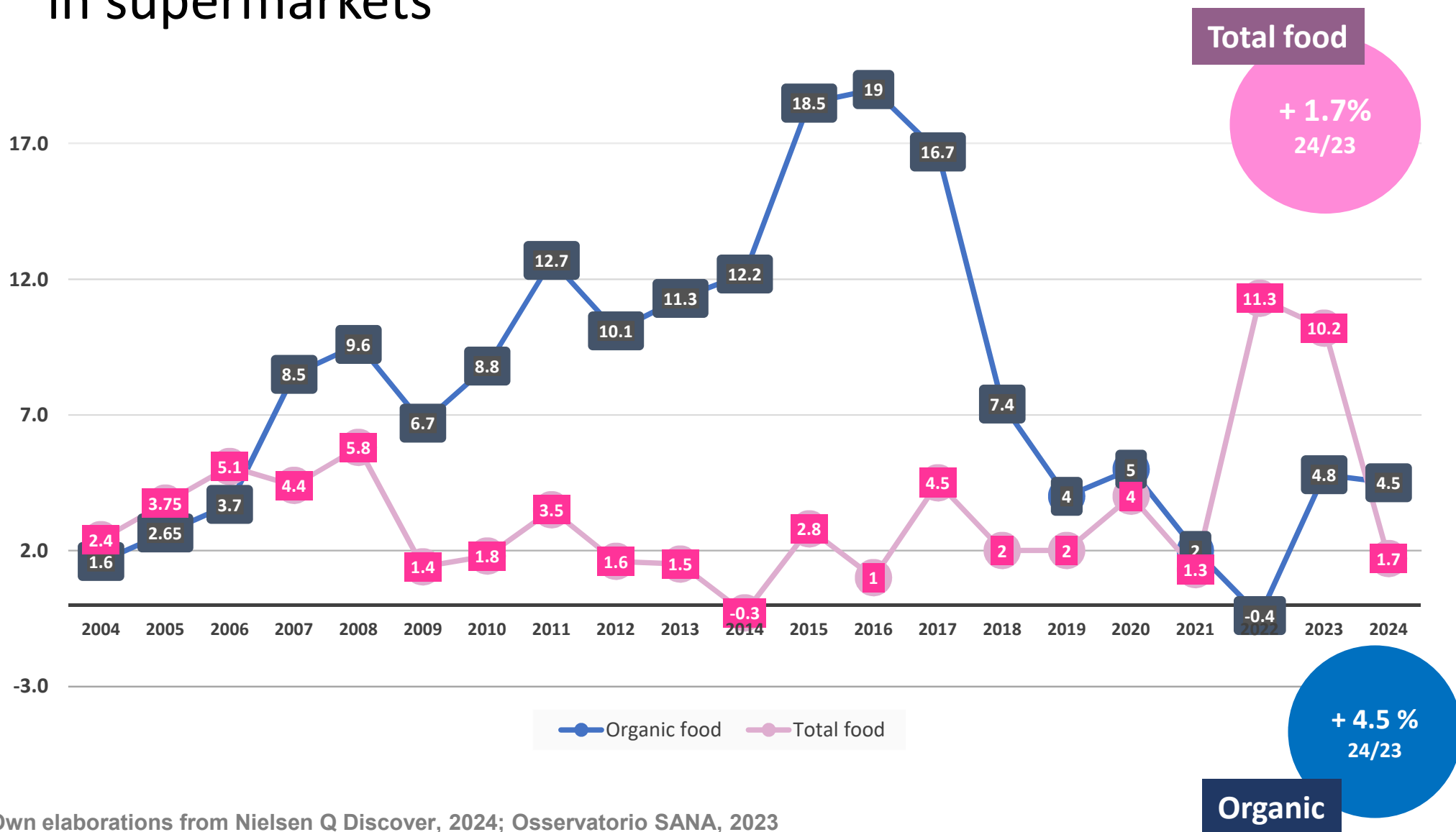


Sales values of organic foods in supermarkets in 2024





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

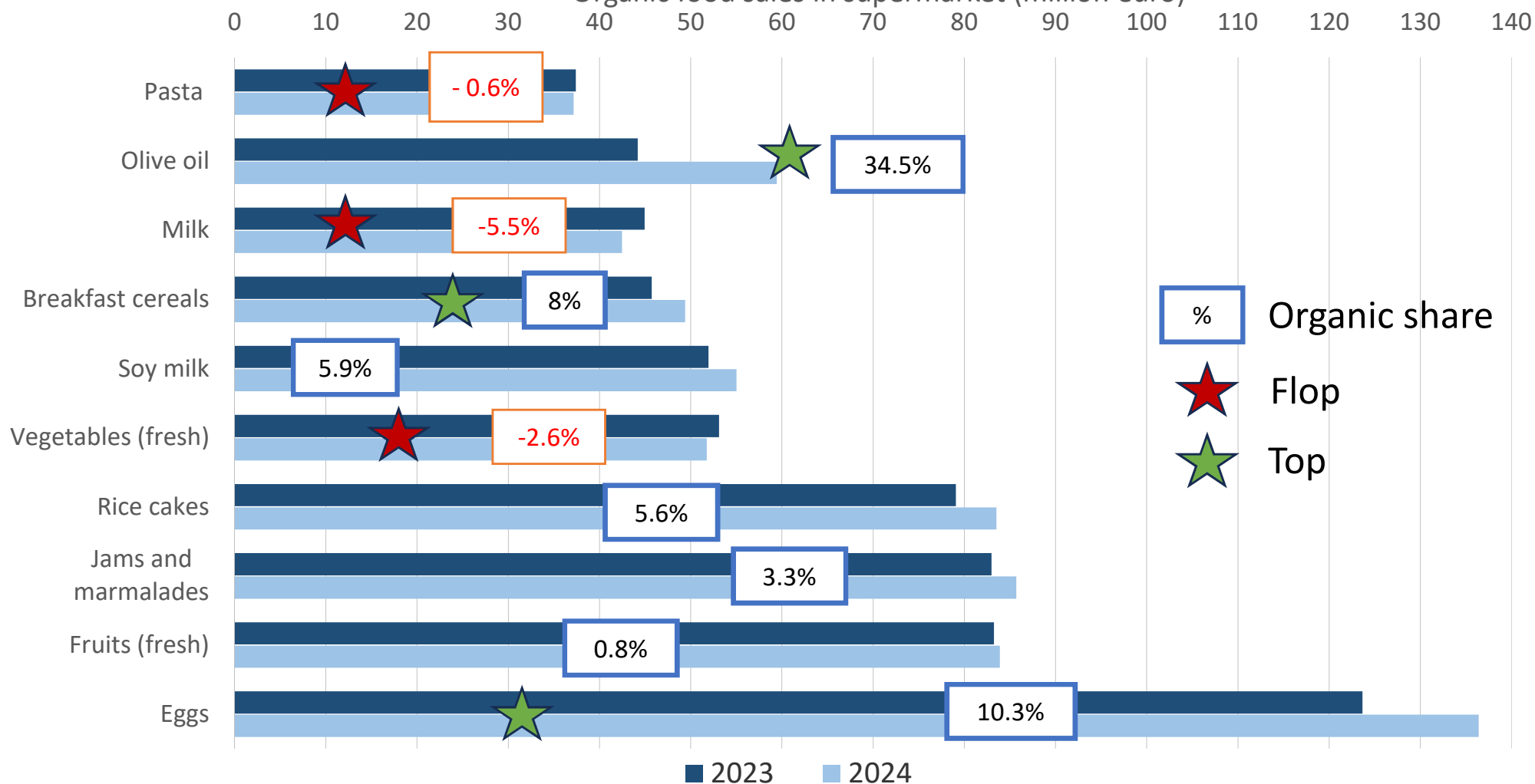




supply remains
concentrated in a limited
number of categories

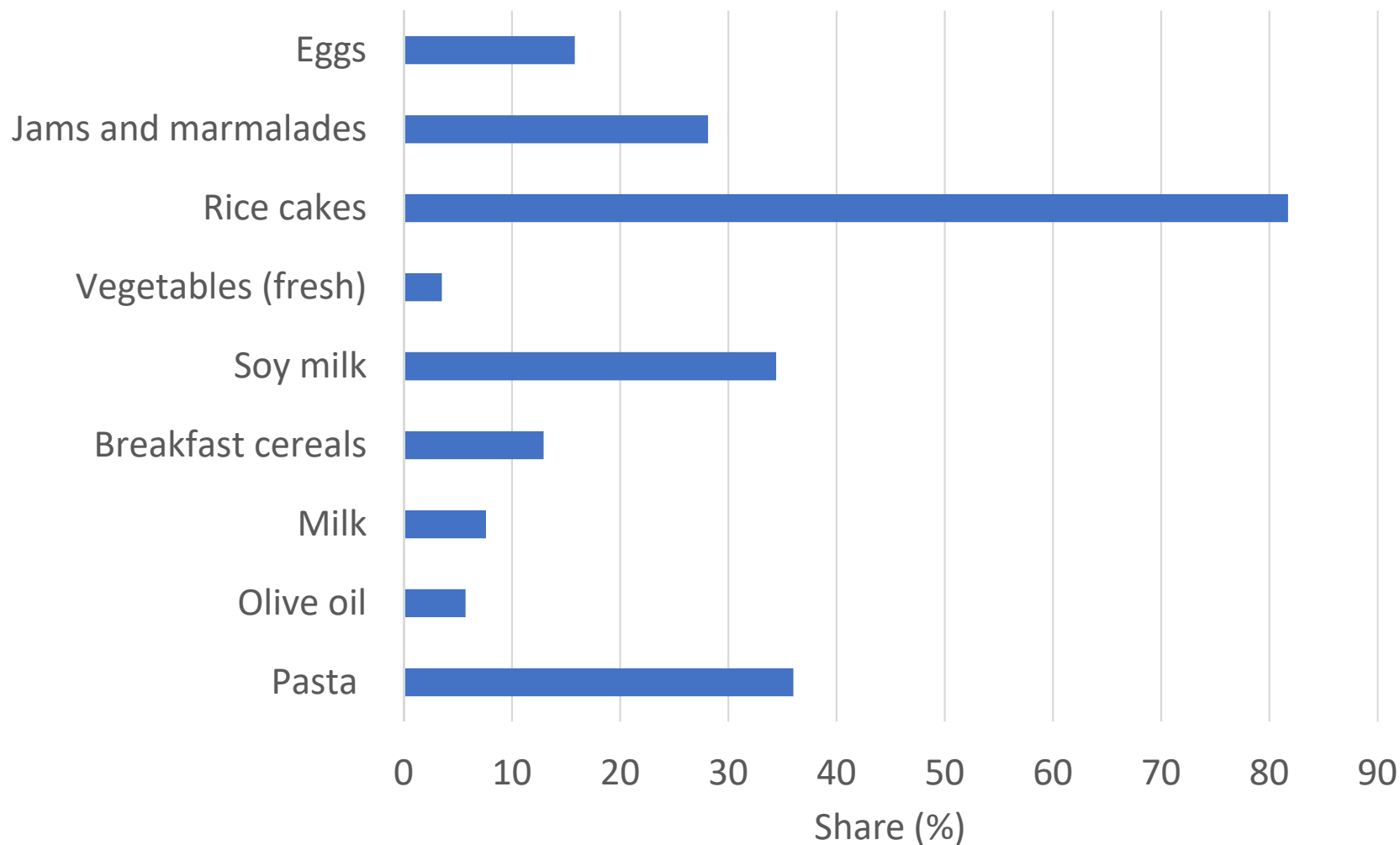
Supermarkets sales (top 10 products)

Organic food sales in supermarket (million euro)





Organic products' share of total value sales Supermarkets sales





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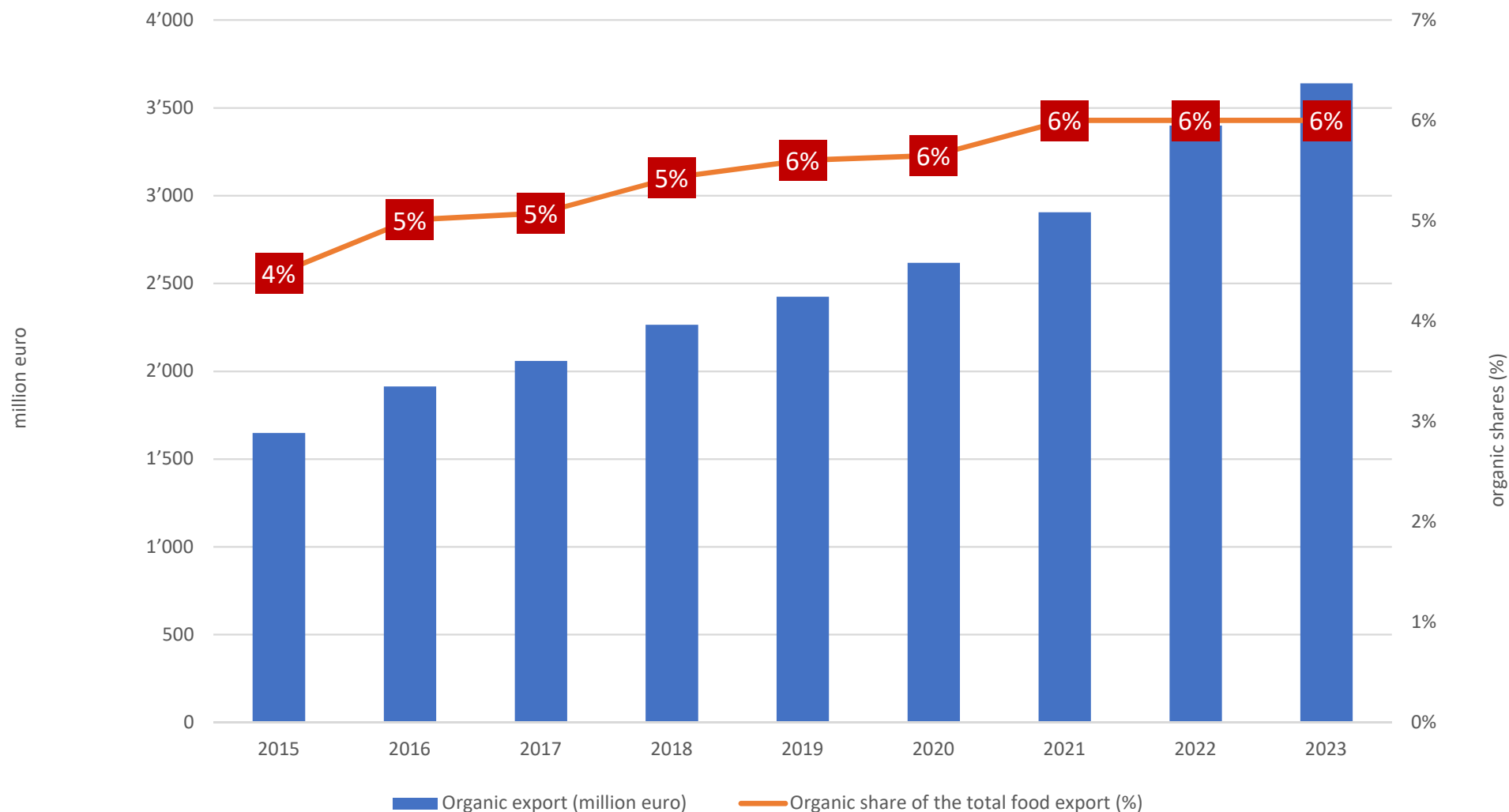
EXPORT

€ 3.6

BILLION

in 2023

IT organic food export



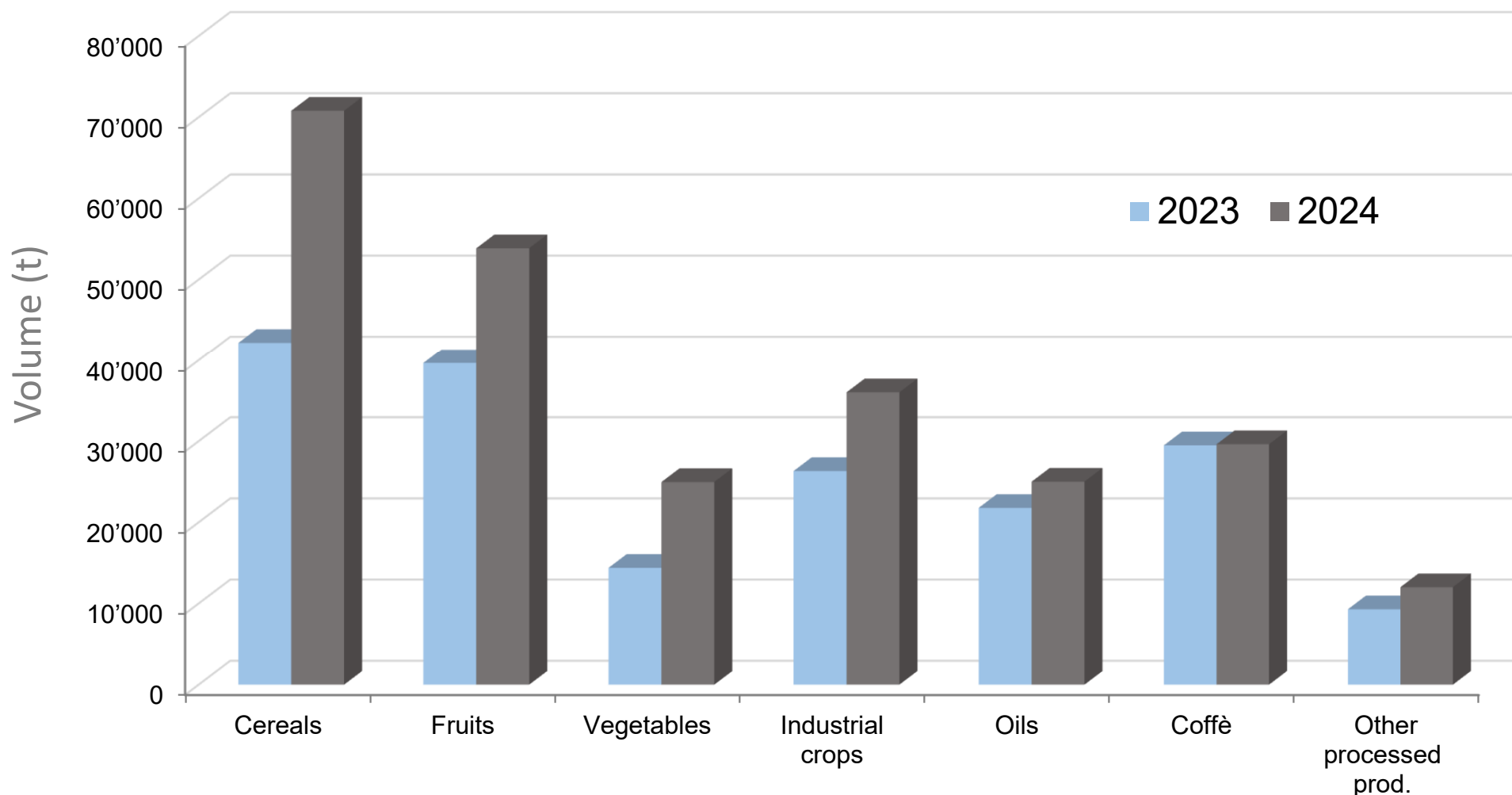


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Organic Import by product (2023 vs 2022)





Conclusions

- The growth of organic agricultural land has surpassed the increase in the number of producers.
- A substantial enhancement is necessary to meet the F2F objectives.
- Signs of market recovery are visible in both supermarkets, which recorded a growth of +4.5%, and specialized stores, which saw a +10% rise.
- The market share of organic products in supermarkets is experiencing a slight upturn but remains below 3%. This means that buyers tend to keep a very limited assortment on the shelves.
- Organic supply is still predominantly focused on a limited range of categories, with approximately 30 categories representing nearly 70% of the market.
- The sector continues to depend significantly on imports, particularly for products such as cereals and industrial crops.



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Thank you !

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