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SANA



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IN COLLABORATION WITH CON



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THE ITALIAN ORGANIC MARKET

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 **Bologna
Fiere**

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Nomisma

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THE ORGANIC MARKET

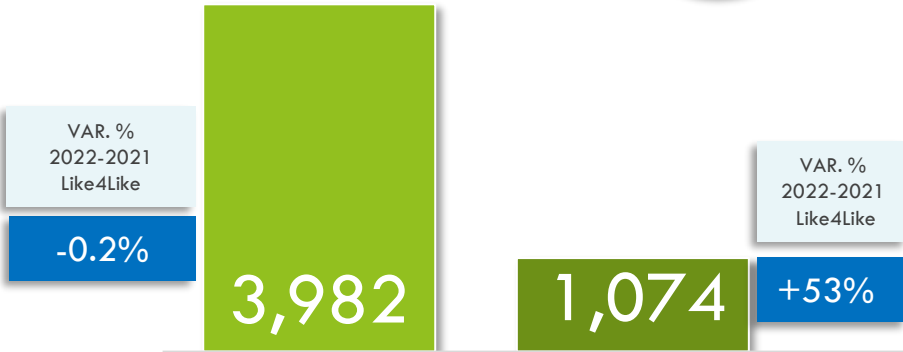
(SALES 2022, YTD JANUARY 2023)



ORGANIC SALES MARKET ITALY

5,056 mln €

+132%
Var. % L4L
2022-2012



AT HOME*



AWAY FROM HOME

- * Including
- Super fresh
 - E-commerce

Restaurant + catering (restaurants, organic restaurants and "general" cafes + agritourism)

PERIMETER:

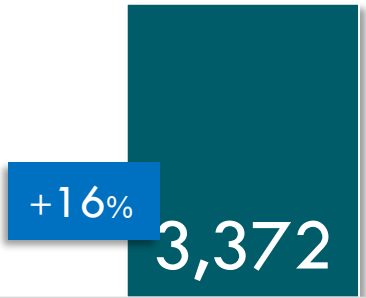
DALLA RIVOLUZIONE VERDE ALLA RIVOLUZIONE BIO
IL BIOLOGICO TRA PRESENTE E FUTURO



EXPORT MADE IN ITALY ORGANICS

3,372 mln €

+181%
Var. %
2022-2012



EXPORT Organic Food
Made in Italy



www.ita.bio



Fonte: Osservatorio SANA-Nomisma – on NIELSEN data, AssoBio, Ismea, Survey Businesses NOMISMA for ICE- ITA.BIO www.ita.bio

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ITALY. "AT HOME" CONSUMPTION & CHANNELS

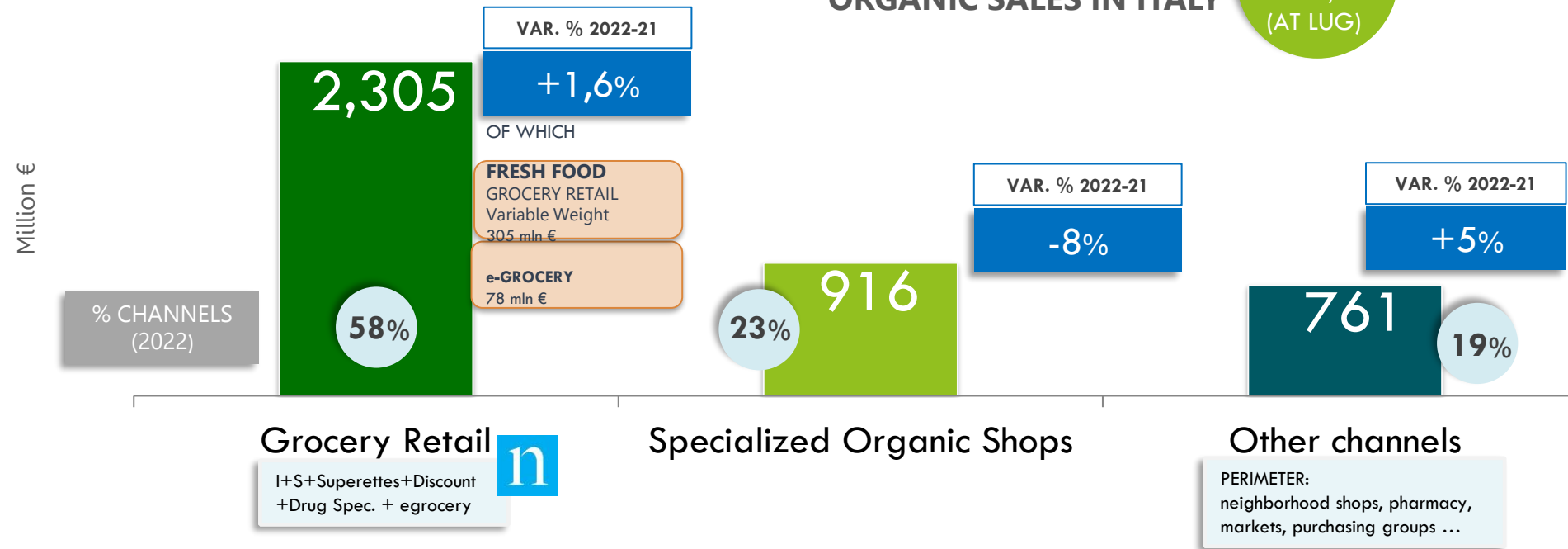
(Values, MD YTD January 2023, OTHER CHANNELS AT July 2022)



3,982 mln €

ORGANIC SALES IN ITALY

-1.1%
L4L 22/21
(AT LUG)



Million €

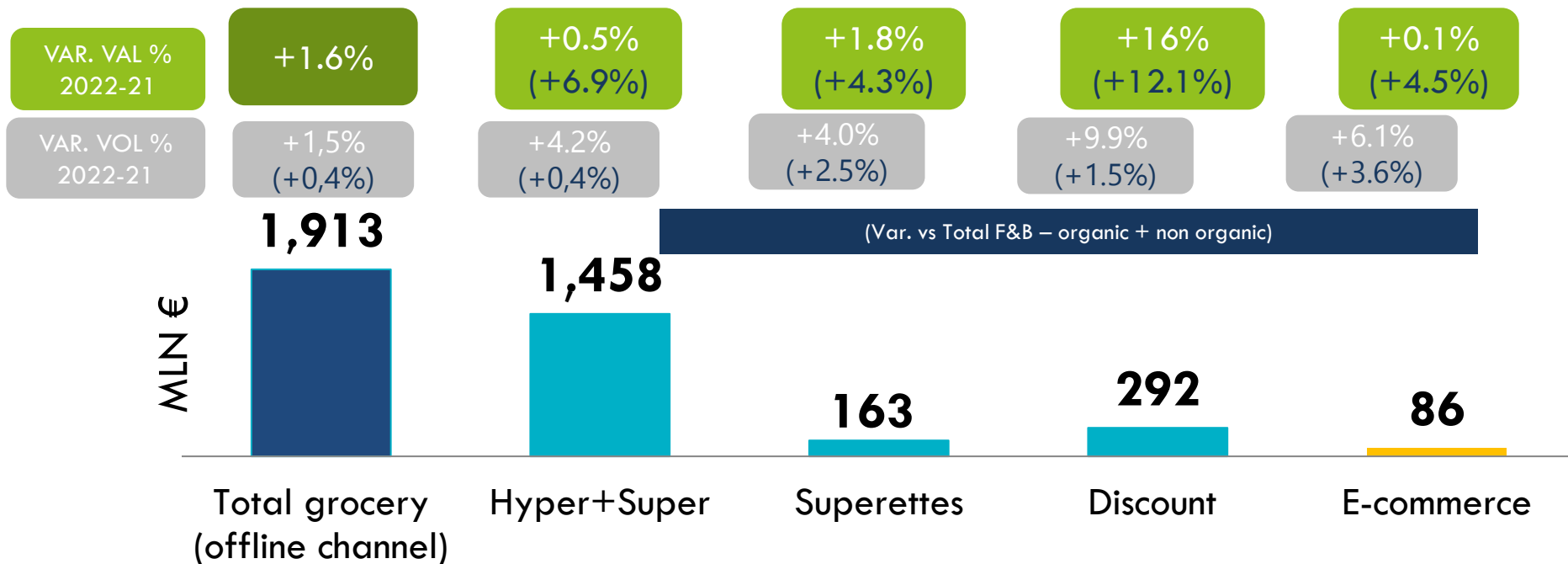


Fonte: SANA observatory 2022-Nomisma - elaborazioni on Nielsen data, AssoBio, Ismea

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GROCERY RETAIL: SALES PER CHANNEL

(values and changes in values and volumes, AT Jan '23, only fixed weight)



Fonte: Nomisma on Nielsen data



KEY FIGURES OF THE ORGANIC IN GROCERY RETAIL

50.2%

% **MDD** omnichannel Total Italy 2022
(+4.1 p.t vs 2021).

-4.5%

Average number of **organic items** sold in **Hyper+Super** -1.5%
Total Italy

+4%

Organic **Private Label**

16%

% **Organic Sales** in promotion **hyper+Super** (-2.1 p.t vs
corresponding period)

+1.7%

ORGANIC basket (volumes)

+2%

WELLNESS BASKET (volumes)

+4.3%

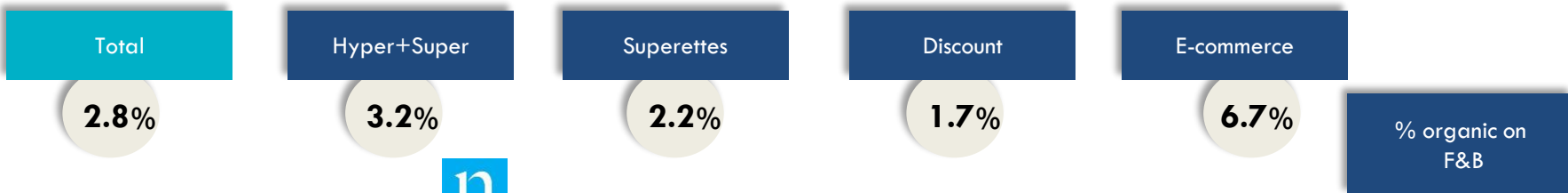
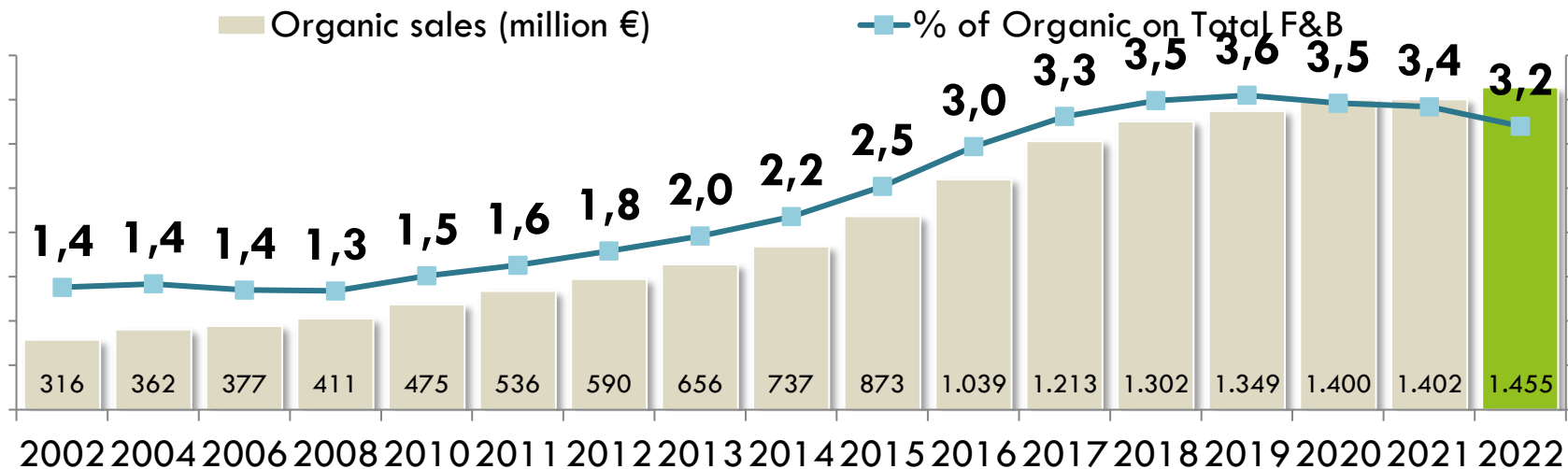
HEALTHY BASKET (volumes)

Fonte: Nomisma on Nielsen data



ORGANIC FOOD VS TOTAL FOOD

Hyper + Super



Fonte: Nomisma on Nielsen data



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SALES AND TRENDS OF THE MAIN ORGANIC CATEGORIES

Hyper + Super – YTD 1 January 2023

Rank	Product (main categories)	Sales (Values) (Mln €)	Trend %
1	EGGS	153.3	6.9%
2	FRUIT JAMS	106.0	4.5%
3	MILK REPLACERS	80.6	7.3%
4	CRACKERS	65.4	-4.1%
5	FRESH MILK	59.4	7.6%
6	EXTRA VIRGIN OLIVE OIL	49.3	0.2%
7	BREAKFAST CEREALS	47.9	7.0%
8	VEGETABLES IV GAMMA	40.7	-1.8%
9	WHOLE WHEAT PASTA/SPELT/KAMUT/BASED OF LEGUMES	38.9	-5.4%
10	SAVORY SNACKS	38.1	-2.1%
11	WHOLE YOGURT	37.3	2.3%
12	DRIED FRUIT WITHOUT SHELL	32.6	-2.7%
13	BABY FOOD	32.3	13.2%
14	SPREADABLE CREAMS	32.2	29.0%
15	LEMONS	28.2	-1.5%

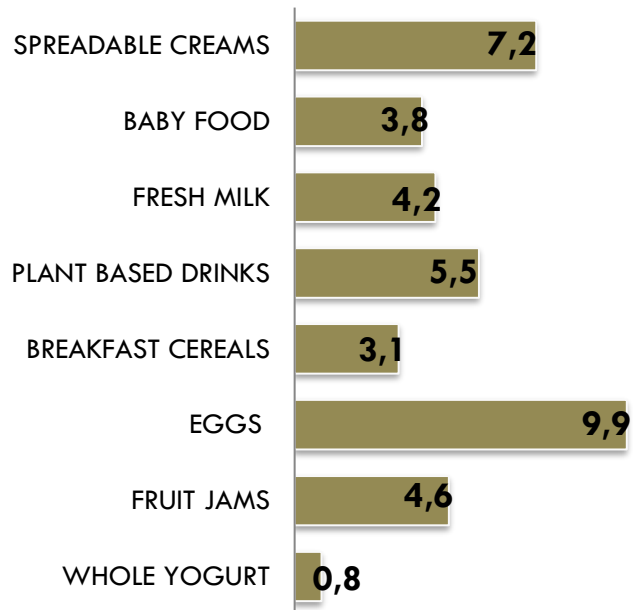
Fonte: Nomisma on Nielsen data

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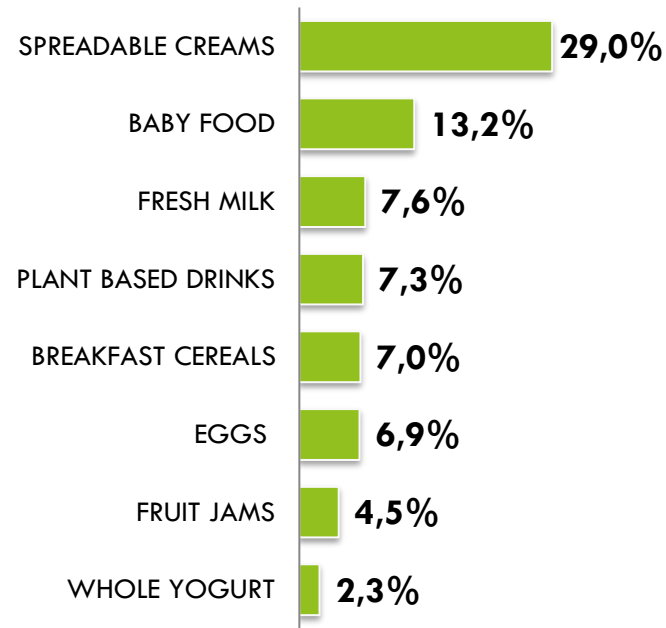
TOP 8 CATEGORIES IN TURNOVER GROWTH 2022-2021

Hyper + Super – YTD 1° January 2023

GROWTH SALES IN VALUES (Mln €)



Var% SALES



Fonte: Nomisma on Nielsen data

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THE ENVIRONMENT AND THE «MADE IN ITALY» CLAIM IN THE SHOPPING CART

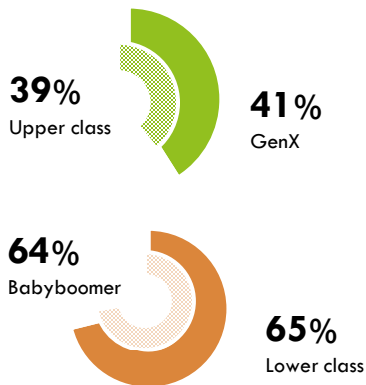
In the next 6-12 months – compared with the last year – which products will you buy in more or less amount? (% of products users)

TOP GROWTH

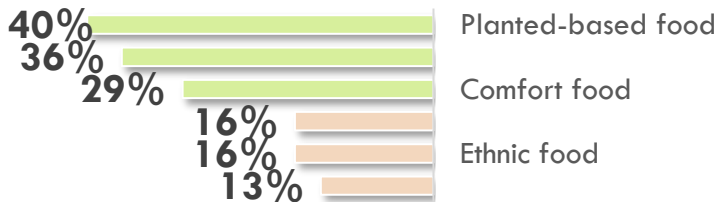
Local / km0	37%
100% italian	35%
Sustainable packaging	33%
Sustainable and environmentally friendly	32%

TOP DECREASE

58%	High quality /premium/Gourmet
38%	Ready to use
36%	Ethnic

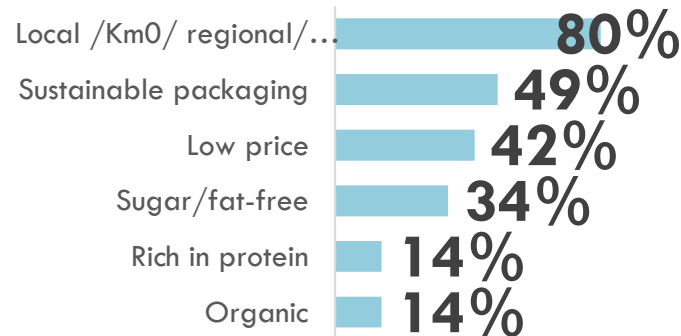


NEW FOOD THAT WILL SET TRENDS IN 2023...

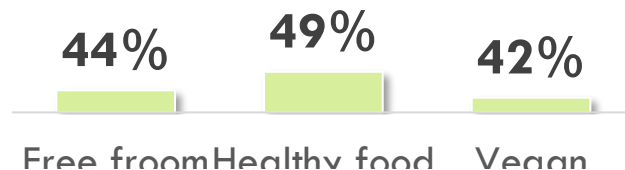


FORECASTS REWARD LOCAL, MADE IN ITALY AND SUSTAINABILITY...

In particular, in order to cope with the crisis and the inflation and in an effort to save money, how will you change your spending habits of the food products with the following characteristics? (% Total population)



HEALTHY FIRST, THE 2023 MANTRA ...



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Fonte: Nomisma for Rapporto Coop 2022

ITALIAN ORGANIC EXPORT AND FOCUS ON NORDICS COUNTRIES



ITALIAN TRADE AGENCY
ICE - Agenzia per la promozione all'estero e
l'internazionalizzazione delle imprese italiane

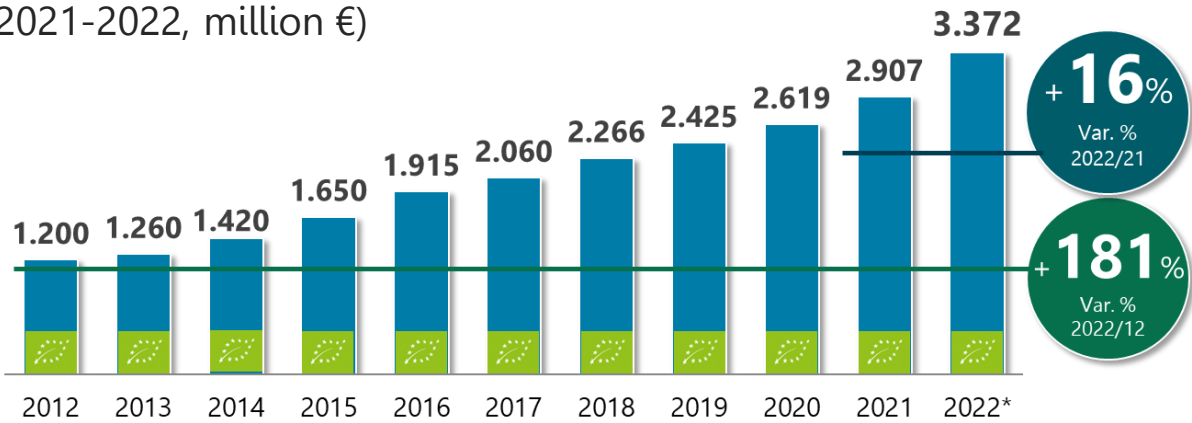


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ITALIAN ORGANIC MARKET: THE EXPORT

(2021-2022, million €)



DIMENSION AND TRENDS

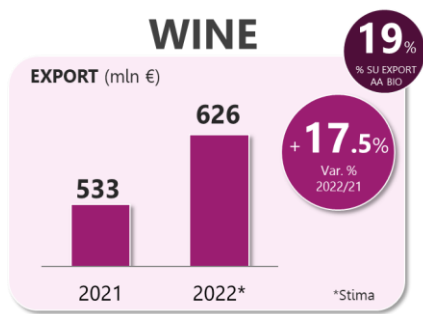


Source: Nomisma on FIBL data and Nomisma's estimates for ICE-ITA.BIO Platform

ROLE BY PRODUCTS



6% peso BIO su tot export FOOD

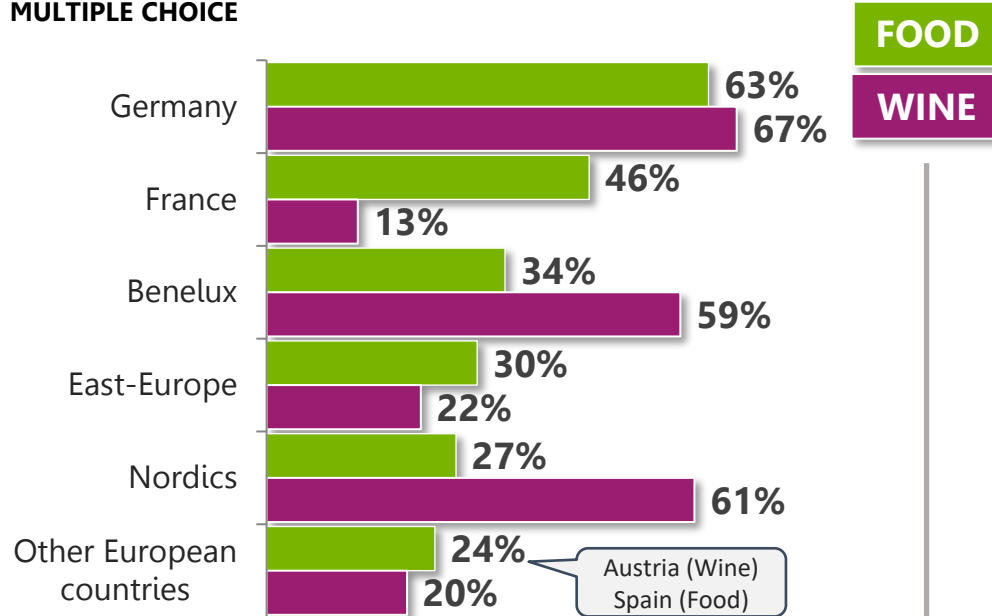


8% peso BIO su tot export WINE

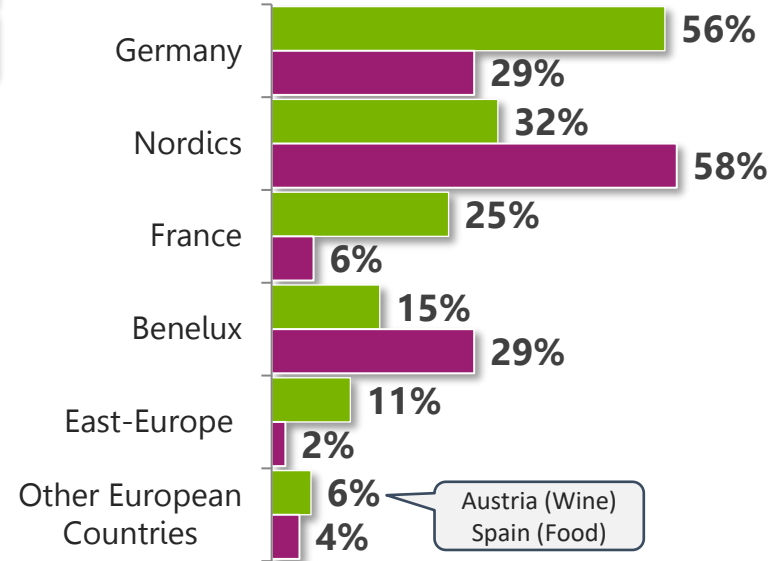
EUROPEAN MARKETS OF THE ORGANIC MADE IN ITALY: TODAY AND TOMORROW

IN 2021, WHAT WERE THE MAIN EUROPEAN TARGET MARKETS OF THE COMPANY'S ORGANIC PRODUCTS?

MULTIPLE CHOICE



WHAT ARE THE EUROPEAN MARKETS WITH THE BEST GROWTH **PROSPECTS** FOR THE ORGANIC MADE IN ITALY?



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FEDERBIO
FEDERAZIONE ITALIANA AGRICOLTORI ECOLOGICI E BIODINAMICI

Calculation basis: Italian Businesses (Organic Exporters)

*Including Norway

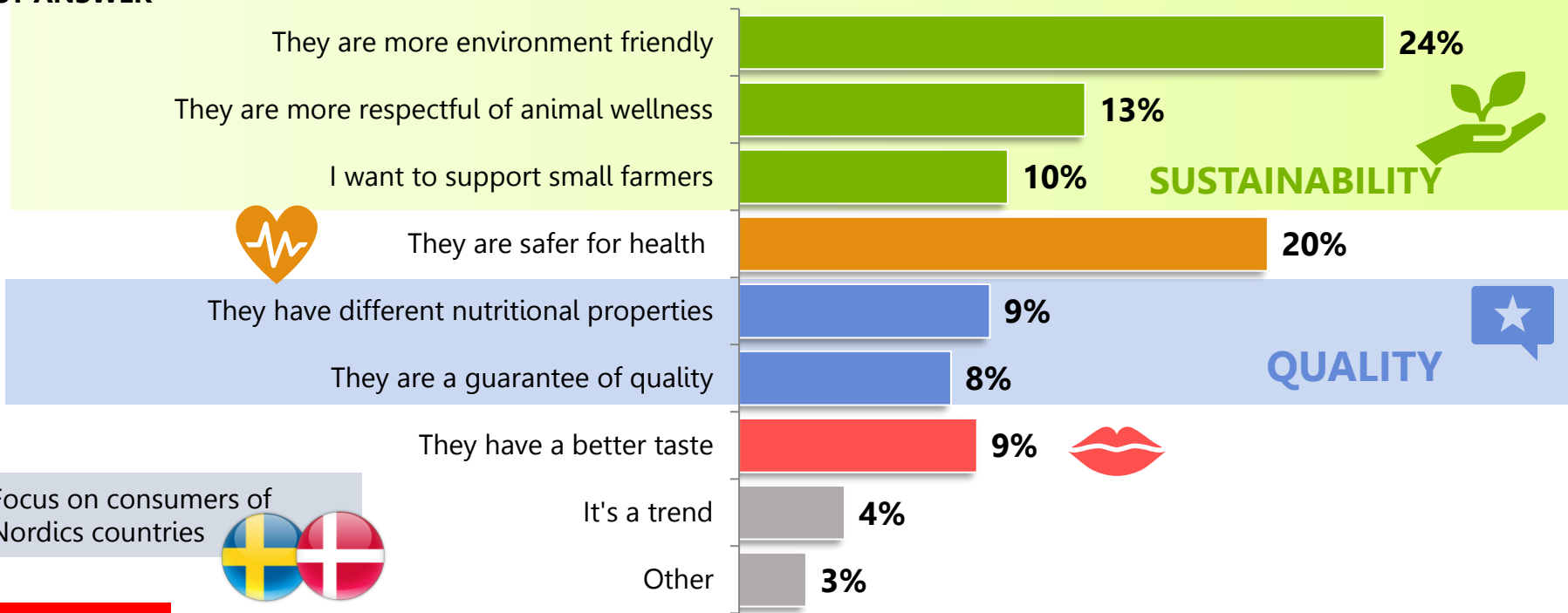
Source: ITA.BIO Nomisma Project for ICE-Agenzia – Survey on businesses NOMISMA

Nomisma

ORGANIC FOOD: REASONS TO BUY

WHY DO YOU BUY ORGANIC FOOD PRODUCTS?

FIRST ANSWER



% of users who have bought organic products in the last year (Sweden + Denmark)

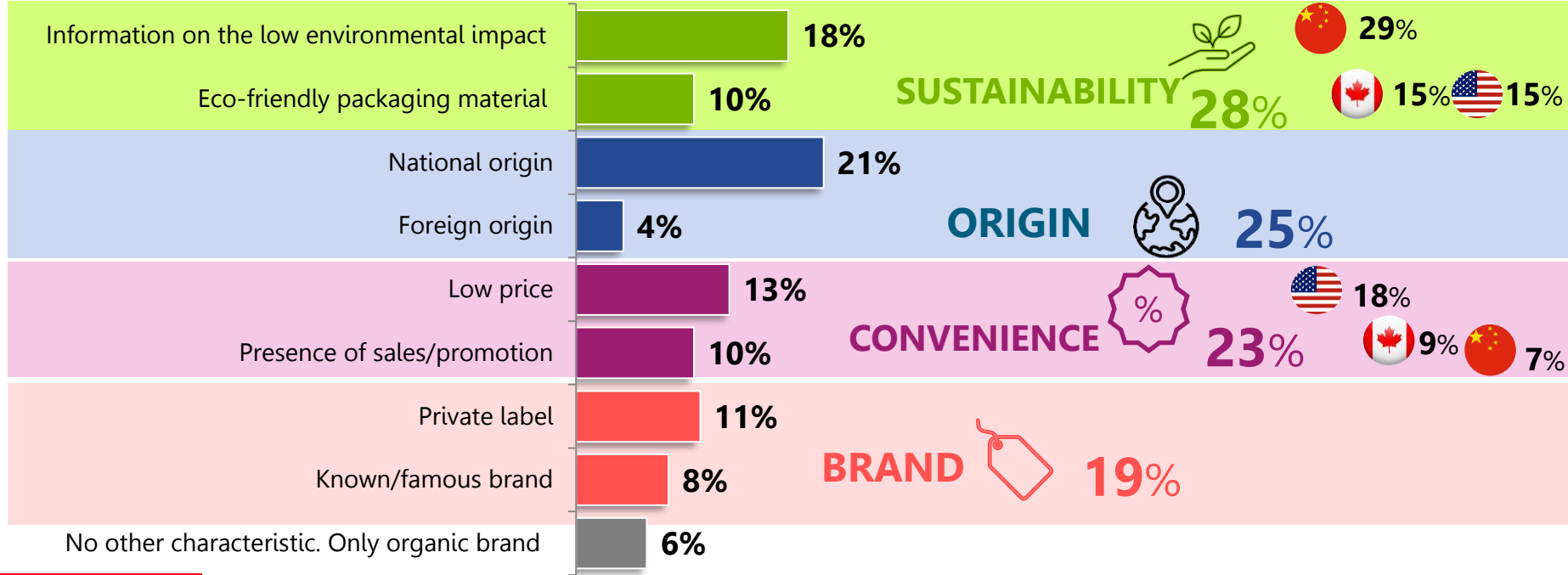
Source: Nomisma ITA.BIO project for ICE-Agenzia – Consumer Survey NOMISMA



WHEN DO YOU BUY ORGANIC FOOD PRODUCTS, YOU PAY ATTENTION TO ...

FIRST ANSWER

Focus on consumers of Nordics countries



% of users who have bought organic products in the last year (Sweden + Denmark)

Source: Nomisma ITA.BIO project for ICE-Agenzia – Consumer Survey NOMISMA

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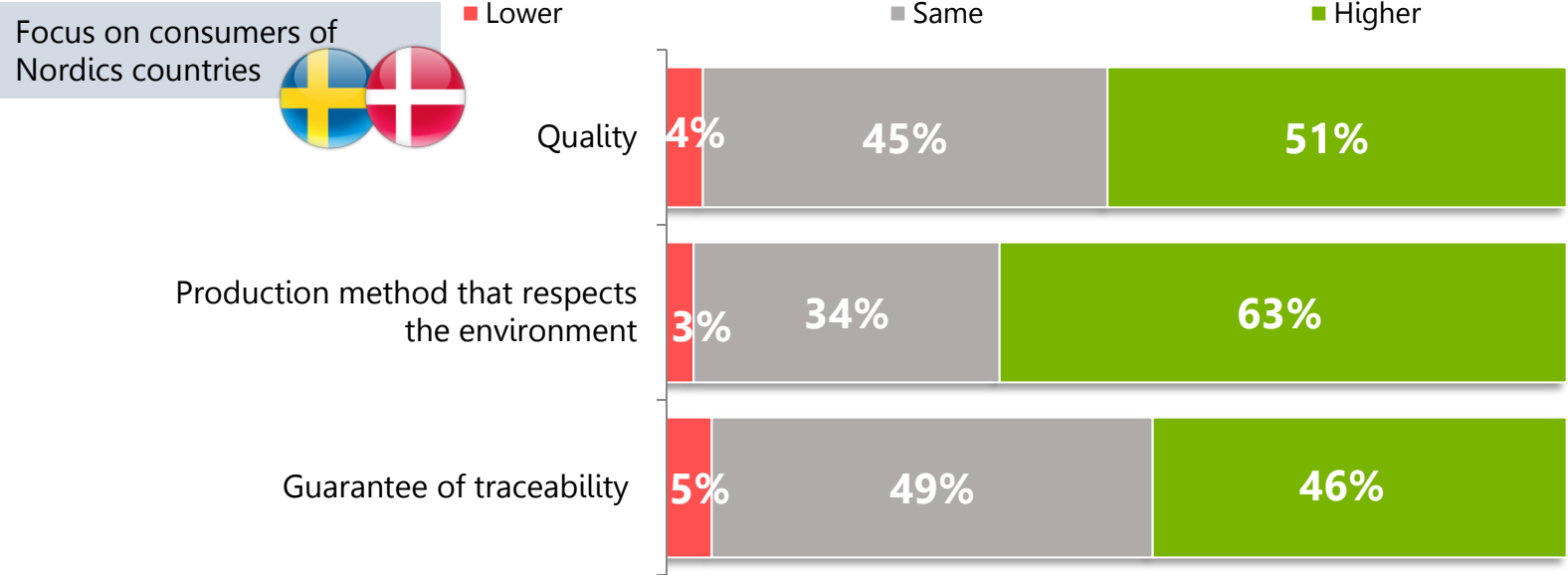
ICE - Agenzia per la promozione all'estero e l'internazionalizzazione delle imprese italiane

FEDERAZIONE ITALIANA AGRICOLTURA ECOLOGICA E BIODINAMICA



REPUTATION OF ORGANIC FOOD

REGARDLESS OF YOUR SPENDING HABITS, COMPARED TO NO ORGANIC FOOD PRODUCTS, THE ORGANIC FOOD PRODUCTS HAVE:



Calculation basis: Total population (Sweden + Denmark)

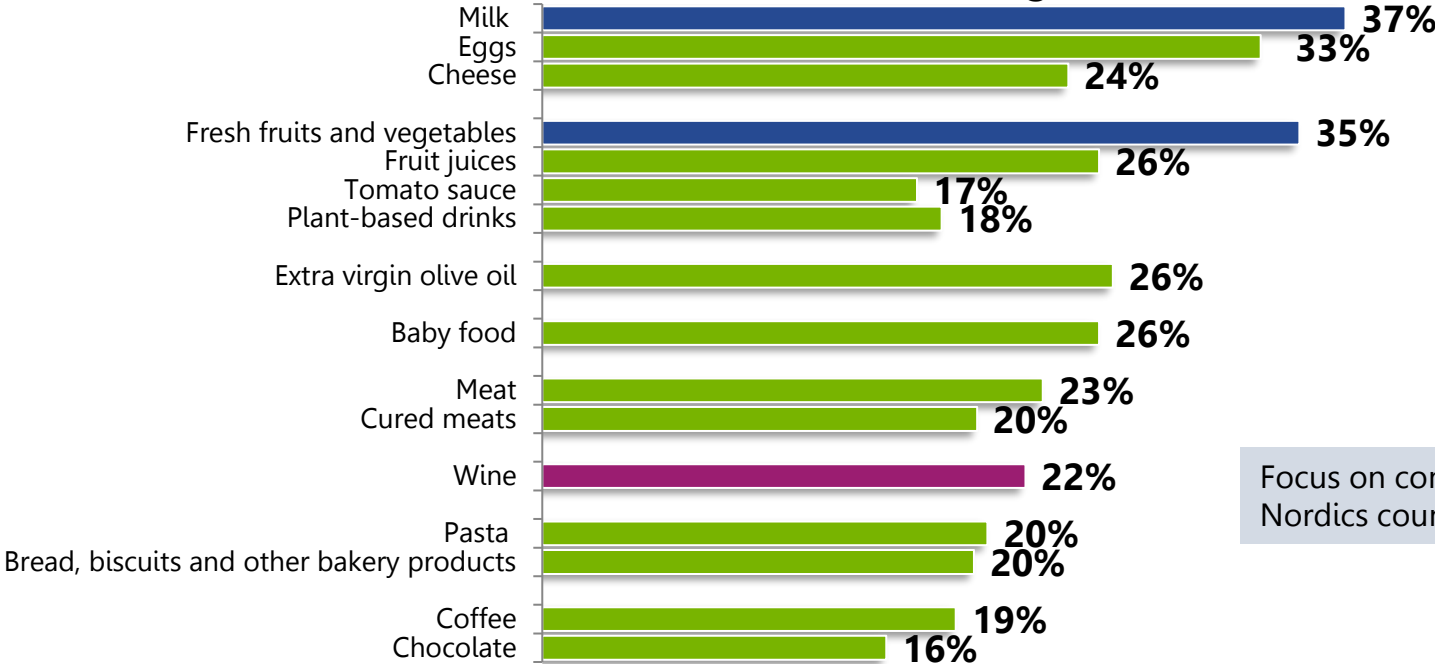
Source: Nomisma ITA.BIO project for ICE-Agenzia – Consumer Survey NOMISMA

ROLE OF THE ORGANIC IN THE CATEGORIES

For the following product categories, the organic is...

FIRST ANSWER

Products for which the organic is the **FIRST CHOICE**



Focus on consumers of Nordics countries 

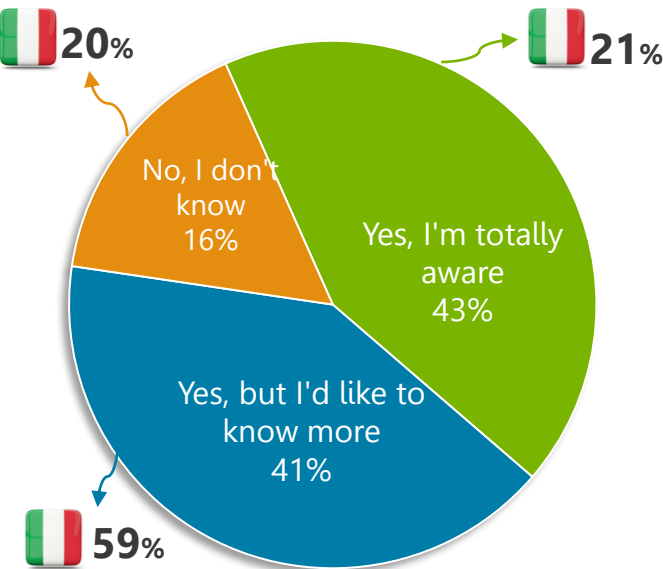
% of users who have bought organic products in the last year(Sweden + Denmark)

Source: Nomisma ITA.BIO project for ICE-Agenzia – Consumer Survey NOMISMA



SUSTAINABILITY: ROLE OF INFORMATION

DO YOU FEEL YOU HAVE ALL THE INFORMATION YOU NEED TO ASSESS THE SUSTAINABILITY OF THE FOOD PRODUCTS YOU BUY?

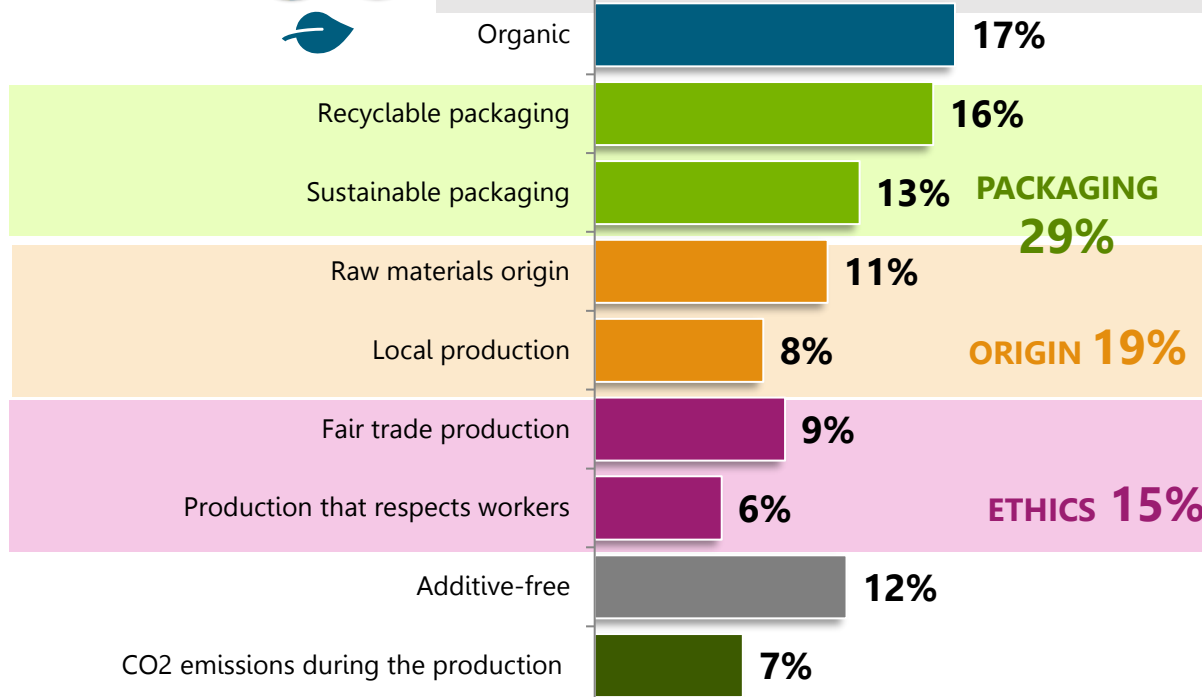


Calculation basis: Total population (Sweden + Denmark)

Focus on consumers of Nordics countries



WHAT INFORMATION DO YOU SEEK ON THE LABEL/PACKAGING OF THE FOOD PRODUCTS TO ASSES THEIR SUSTAINABILITY?



% of users who read the product label / logos (Sweden + Denmark)

Source: Nomisma ITA.BIO project for ICE-Agenzia – Consumer Survey NOMISMA



SUSTAINABILITY: INFORMATION CHANNELS

WHERE DO YOU USUALLY SEEK INFORMATION TO ASSESS THE SUSTAINABILITY OF THE FOOD PRODUCTS YOU BUY?

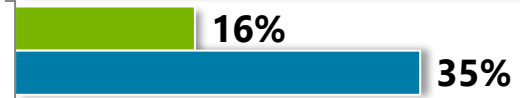
Focus on consumers of Nordics countries



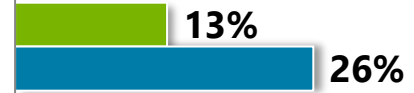
I read the product label



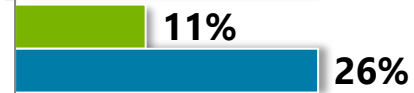
Presence of sustainability logos



I rely on my relatives/friends' advice



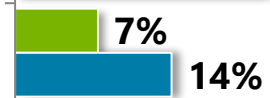
I seek information online - on the producer's web site/social pages



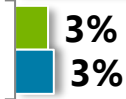
I seek information online - on the consumers' web site/social pages



I ask information to the retailer



Other



■ First answer in order of importance
■ Multiple choice

Calculation basis: Total population (Sweden + Denmark)

Source: Nomisma ITA.BIO project for ICE-Agenzia – Consumer Survey NOMISMA





Per informazioni
@ biologico@nomisma.it



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