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Alimentari ed Ambientali

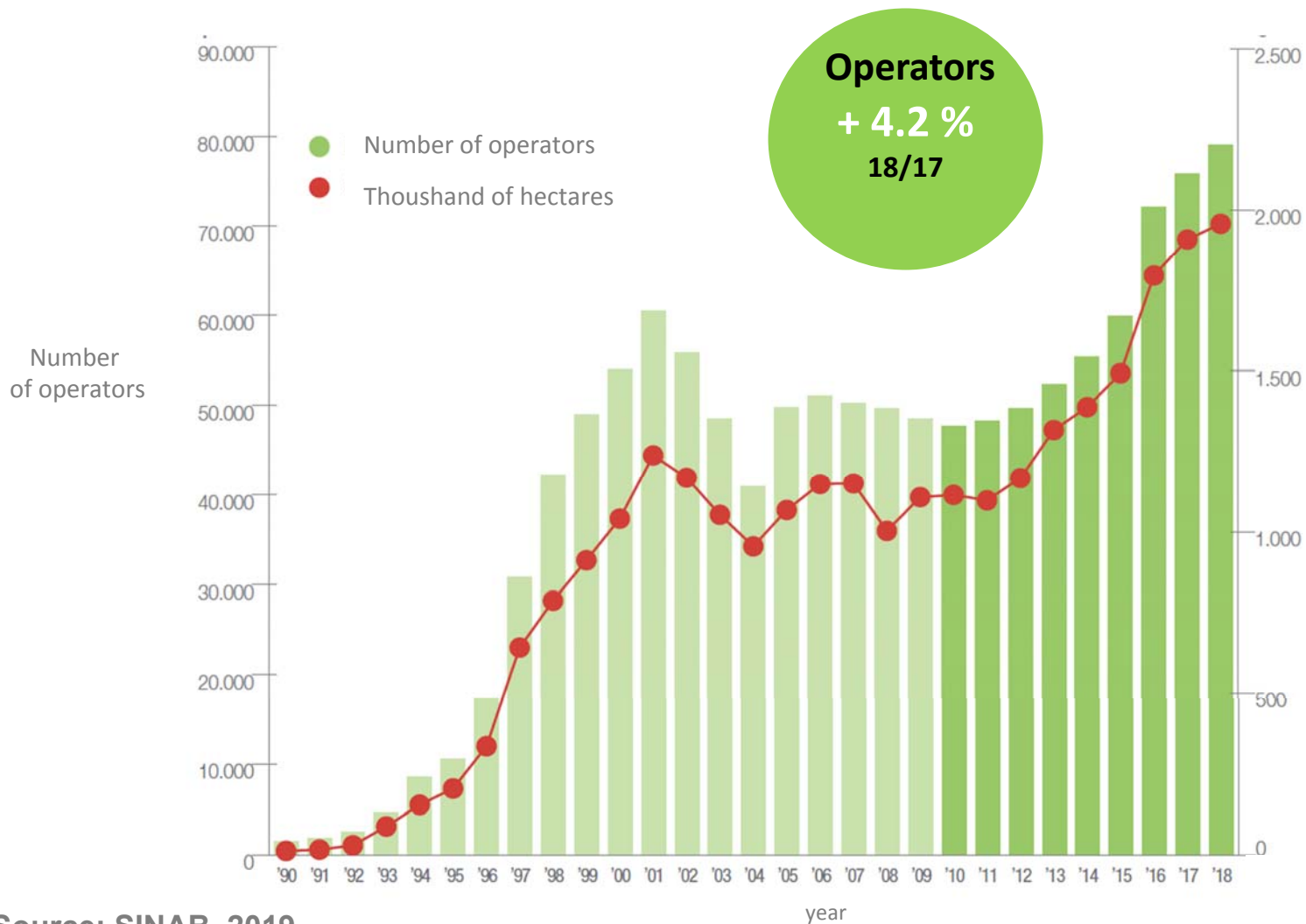
The Italian Market for Organic Food

**Nuremberg, Germany 12.02.2020
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Dr. Francesco Solfanelli



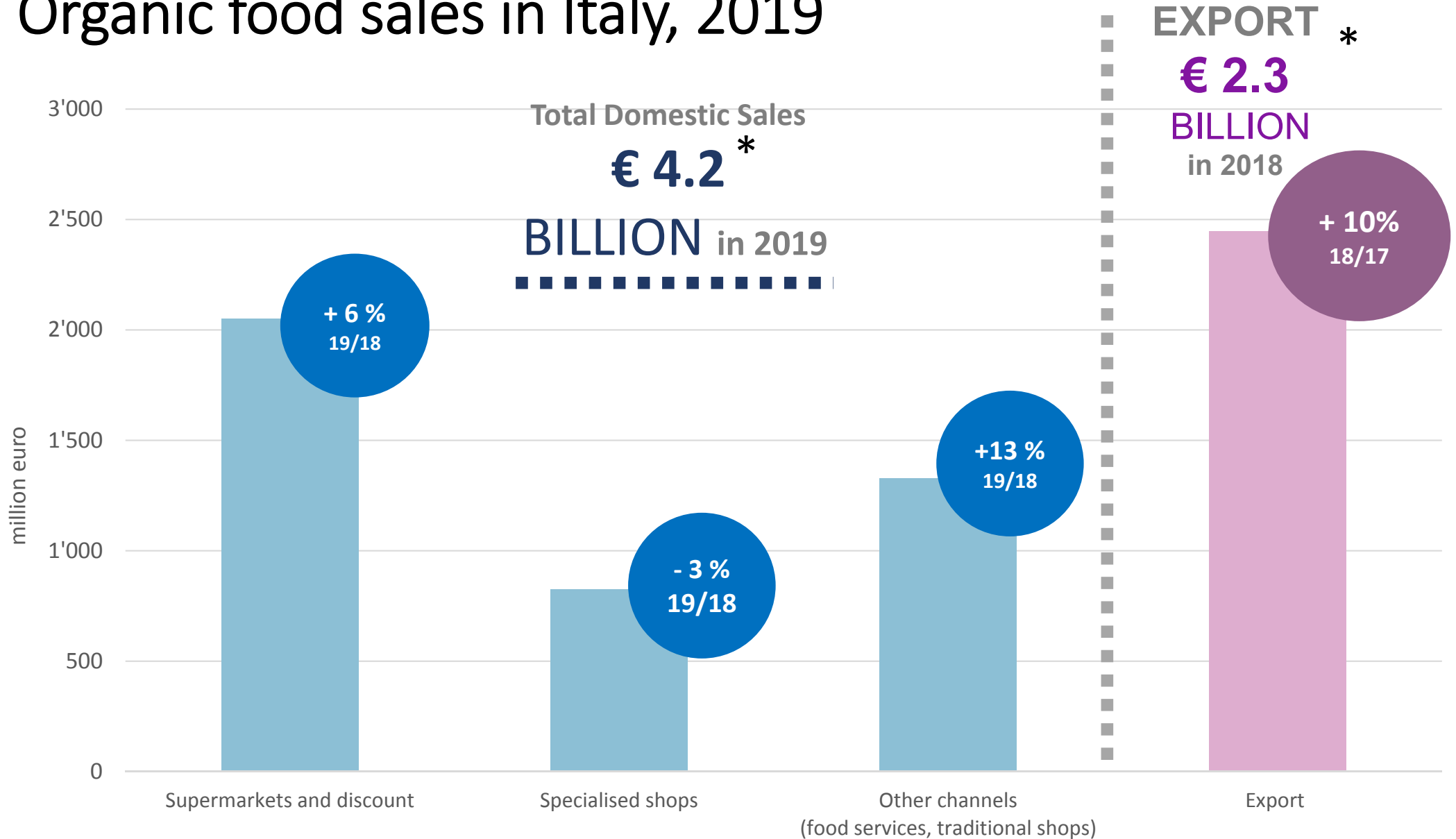
Development of organic agricultural land and operators 1990-2018



Operators (nr)	79,046
UAA (ha)	1,958,045
Share (UAA)	15.5%



Organic food sales in Italy, 2019

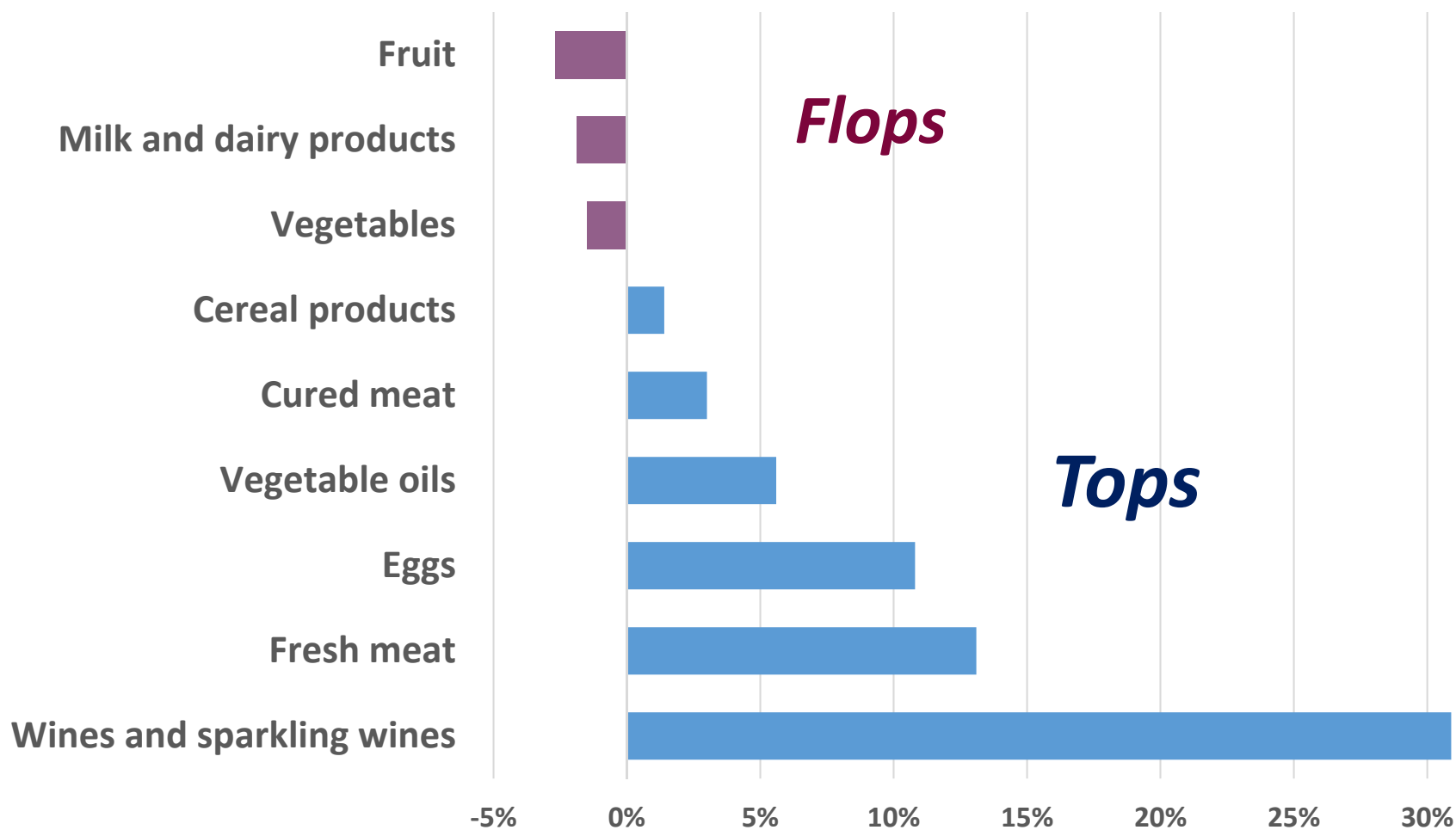


* Own estimation based on AssoBio, 2019



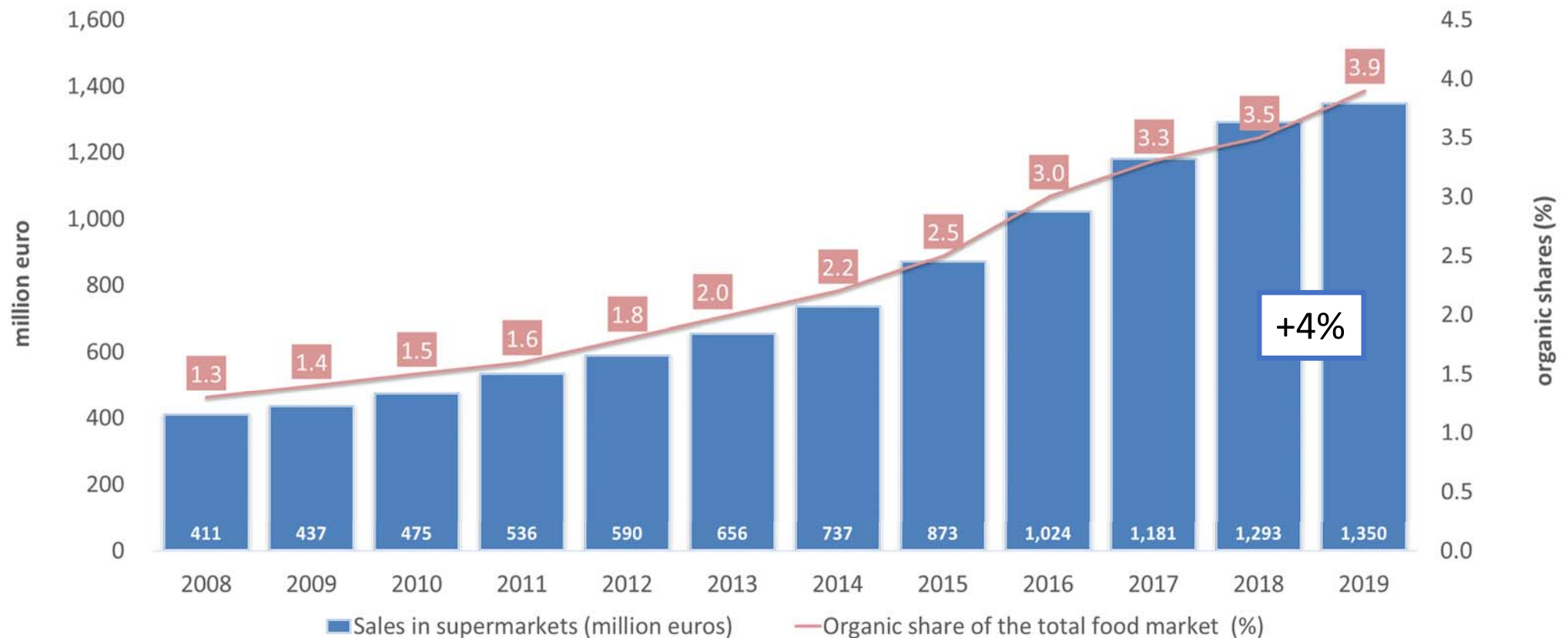
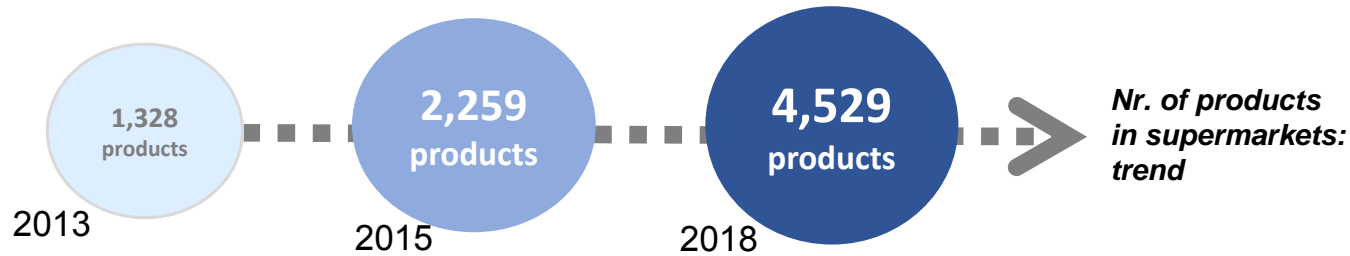
Growth rates of sales values

household purchases in Italy, 2019 vs 2018 (%)



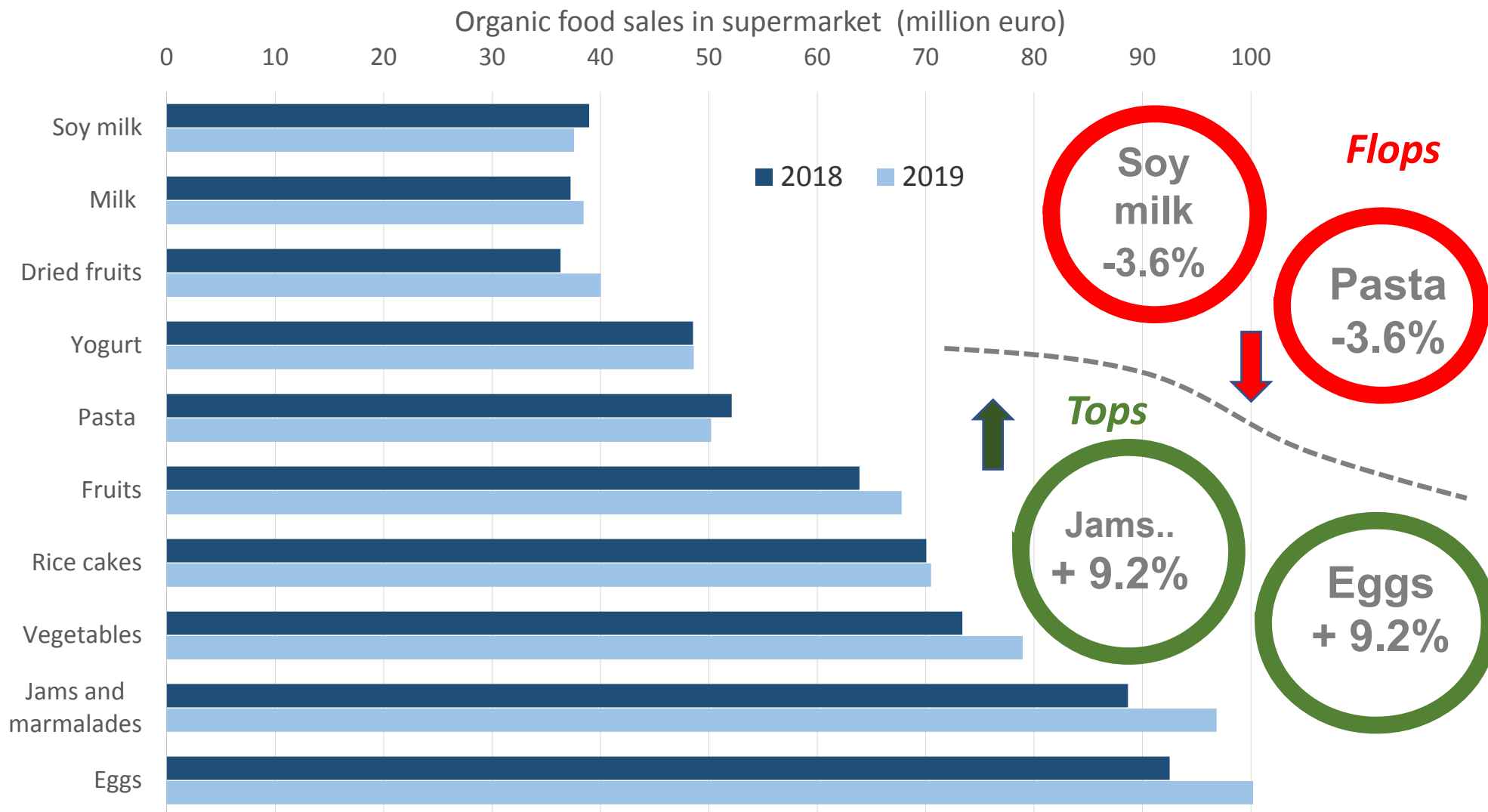


Sales values of organic foods in supermarkets



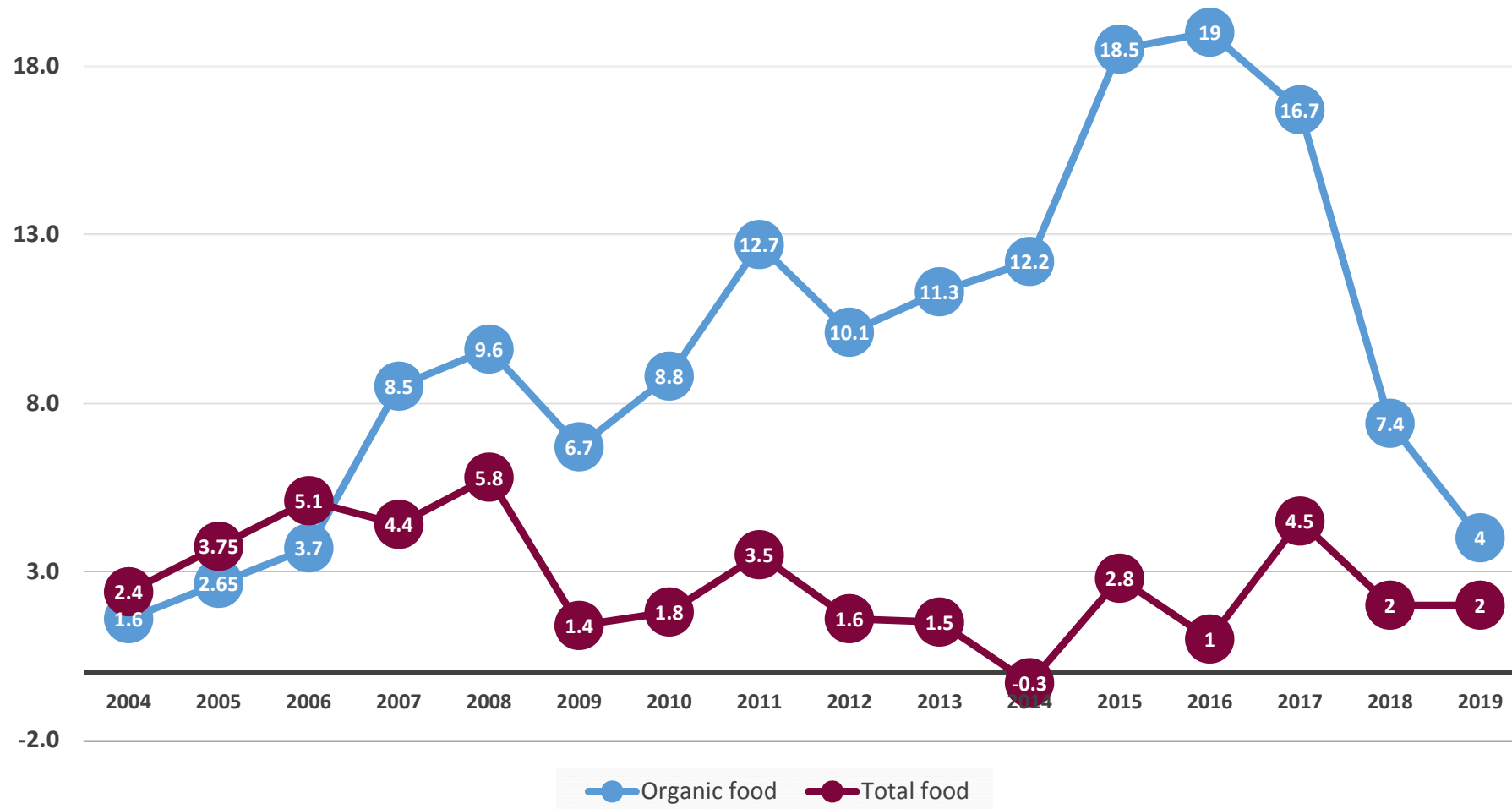


Supermarkets sales (top 10 products)





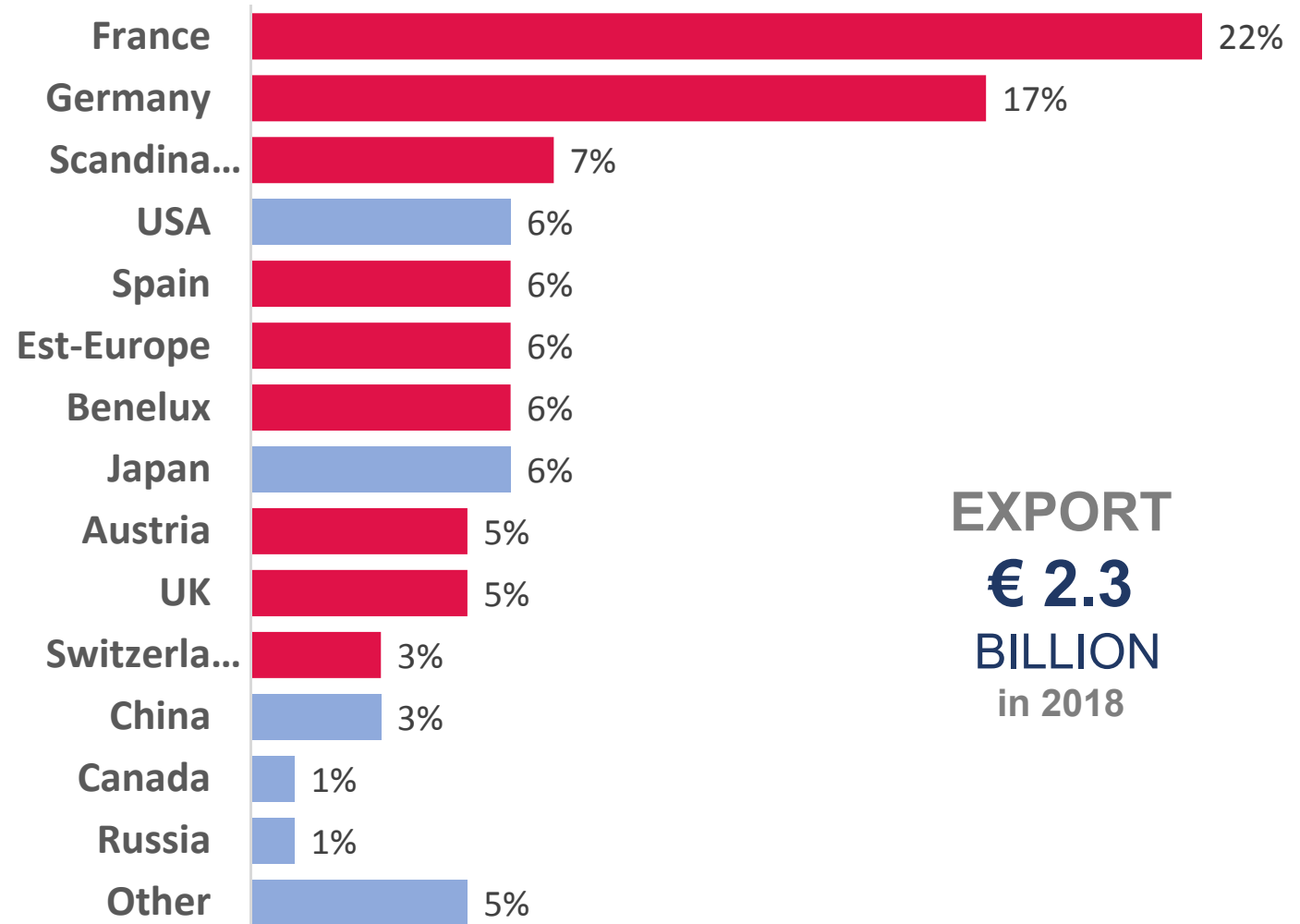
Organic and total food growth (%) rate for the sales values in supermarkets





Export destination for IT organic food

% of sales by country



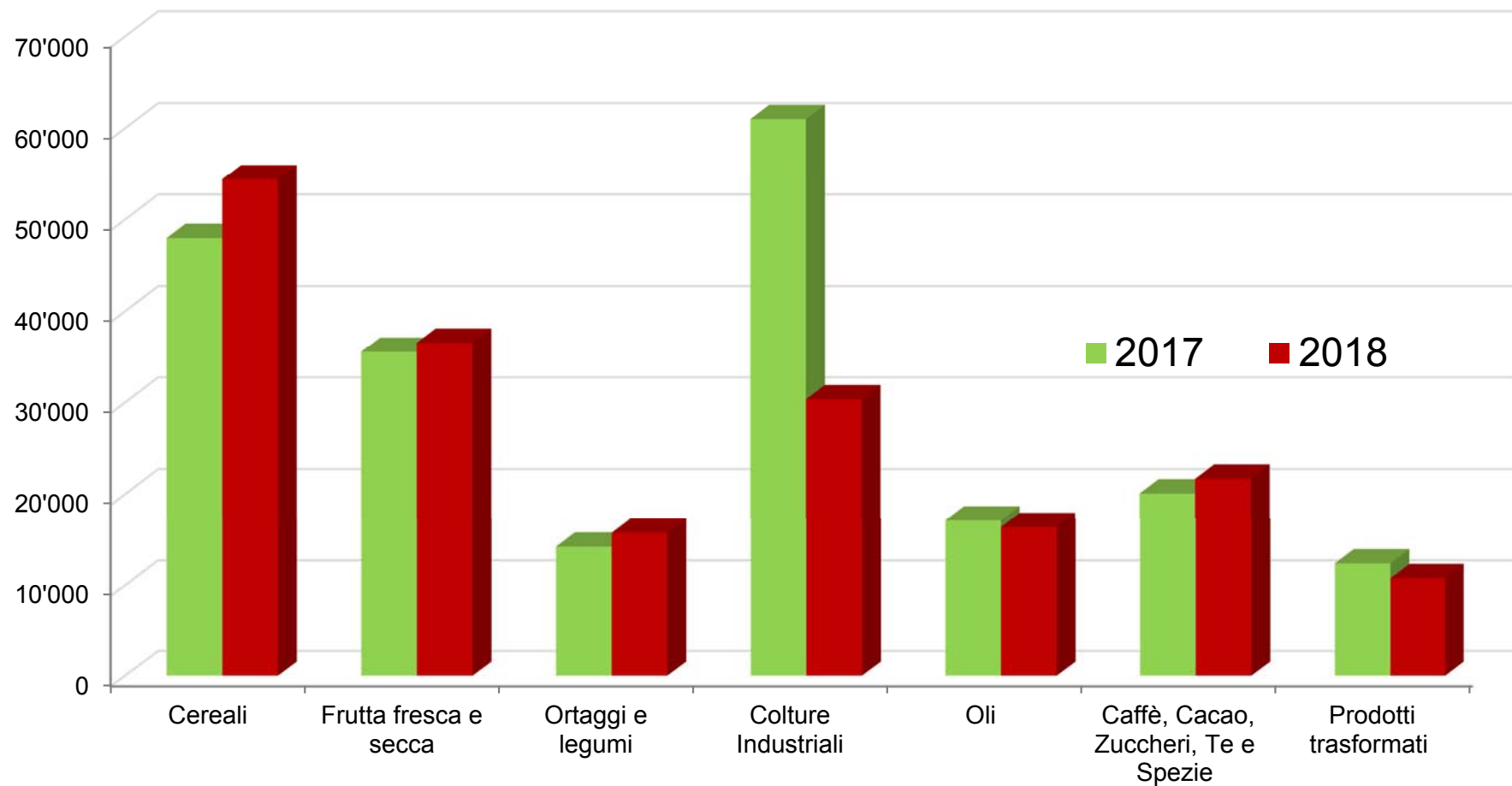
77%
EUROPE

23%
OTHER

EXPORT
€ 2.3
BILLION
in 2018

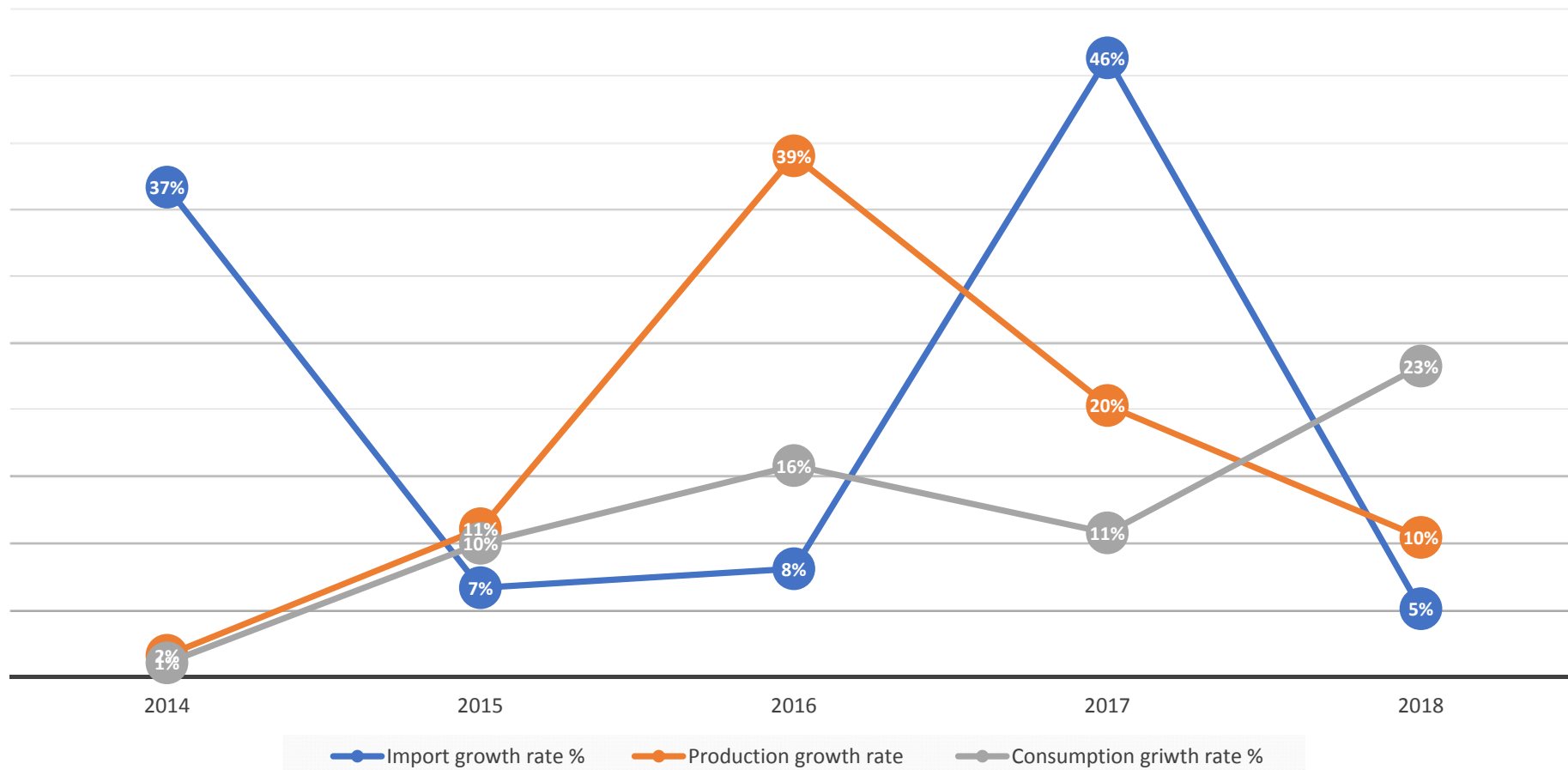


Organic Import by product (2017 - 2018)





Annual growth rate of import (value), UAA (ha) and sales (value) of fruit and vegetables (in %) from the third countries





- In 2019, organic food sales in Italy grew at lower rate than in the past years. On average, sales of organic product in supermarkets **rose by 6%**, while specialised shops sales **decreased of about 3%**.
- The Italian organic market structure continues to change, with **discounts increasing their market share (+15%)**.
- Italian's eating habits are also changing: food away from home (e.g. food services, restaurant, bar) is increasing
- **Organic land grew at a lower rate than in the past** two years and for some categories (e.g. fruit, veg, pulses and olive oil) the domestic market still relies for a quite big percentage on imports.



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mipaf
ministero delle politiche
agricole alimentari e forestali



Thank you !

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