

## THE SANA OBSERVATORY 2018: ALL OF THE DATA CONCERNING THE PURCHASING HABITS FOR ORGANIC PRODUCTS AND THE STRATEGIES OF THE SPECIALIZED CHANNELS

Today saw the presentation of the results of the survey of Italian food agriculture, promoted by BolognaFiere with the support of FederBio and Assobio and curated by Nomisma.

**8 out of 10 consumers have purchased organic products in the last year and 42% are “frequent users”. Among the standout categories are fruit and vegetables.**

**Also agricultural production is growing: according to data from SINAB, the area of land cultivated in Italy has exceeded 1.9 million hectares, an increase of 6.3% compared with 2016.**

“All of the numbers of Italian Organics: the consumer motivations and the new specialized channel” was the title of the **2018 SANA OBSERVATORY**, the in-depth study of the leading topics concerning the sector, presented at Bologna on the opening day of **SANA – the 30<sup>th</sup> edition of the International Exhibition of Natural and Organic Products**.

The survey was compiled by **Nomisma** – and promoted by BolognaFiere with the support of **FederBio** and **AssoBio** –based on a sample group of 200 retail points for the section dedicated to the retail channel and 800 families for the analysis of purchasing habits and motivations.

### **The consumer: the identikit of an organic user**

Organic products are increasingly common in Italian households. **8 out of 10 consumers**, in fact, have purchased an organic product in the last year. **42% of them are “frequent users”**, who purchase organic products each week. It is an informed and conscious choice; according to the research, almost half of those questioned prefer organic products because they believe that they are “exactly what I want”. For 52% of respondents the choice is determined by health reasons but there are others whose choices are motivated by the quality guarantees safety for these types of goods (47%) and those who choose organics because they prioritize respect for the environment.

Among the categories that are purchased the most are fruit and vegetables (chosen by 61% of consumers), followed by milk and dairy derivatives (57%) and eggs (53%). While 44% of organic users purchase products in regular supermarkets, 19% continue to prefer the specialized channel, especially led by the offers available (24%) and a greater trust in the products sold there (19%).

The consumer survey outlines the growing demand for organic products, a trend confirmed by the aggregate sales data that has increased to 5,612 million euros (+8% compared with 2016), 3,552 million of which is traceable to the domestic market (+8% vs 2016).

### **The specialized sales points: the numbers and the goods on offer**

With 1,437 units achieved in 2017, the number of specialized shops has increased by 13% compared with 2013 and by 111% compared with 1993 (source: BIOBANK). Of these 60% of are concentrated in northern Italy and 45% have opened in the last decade.

Concerning the selection of goods for sale the survey highlights how the majority of retail points also offer non food products: in particular, 81% offer natural and certified organic products for personal hygiene, 76% cosmetics and 63% herbal products. Products for household cleaning are also popular and available in 73% of shops.

Overall, a specialized retail point offers around **2000 items**, 79% of which are packaged food products, with the macro-categories being pasta, rice, flour, bakery products indicated in 77% of shops as being the category in which the number of items have increased the most in the last 2-3 years.

34 % of shops stated that the main criteria in their selection of products was the intention to **differentiate their own goods** from those of the supermarket sector and 24% underlined the importance of **including on their shelves** new products capable of attracting the consumers' attention. **Ecological packaging** was considered fundamental to the success of products by 40% of respondents.

Among the products best received by customers were those considered to have properties beneficial to health (indicated by 34% of retail points) or vegan products (36%).

### **The relationship between retail points and their clients**

The Nomisma survey also identified the **typical clients of the specialized retail points**: women were the prevalent gender according to 79% of respondents, belonging to the age group between 35 and 45 years old (50%), with children younger than 12 years old (43%), with medium to high income (78%) and "heavy users" of organics (whose shopping is composed of between 80 to 100% organic food products), who choose products based on a particular lifestyle (free from/vegetarian/light) and who develop a relationship of trust with their supplier, visiting the retail point at least once a week.

The relationship of trust is cultivated and strengthened by initiatives by the managers and owners, who, in addition to paying great attention to the atmosphere inside the shop, dedicate a wide range of added services, such as loyalty cards, special events and the presence of expert staff trained to provide information about the products, to name just three of the most widespread services considered most important by the participants in the survey.

### **The SINAB data**

Also presented today was the data from **SINAB – The National Information System for Organic Agriculture**, a project of the Ministry of Agricultural Policy, Forestry and Tourism managed by ISMEA and CIHEAM.

In 2017 the total land cultivated in Italy exceeded **1.9 million hectares**, an increase of **6.3%** compared with 2016. In absolute terms, in the last year, an **extra 110 thousand hectares** were cultivated.

Excellent data arrived from Sicily (427,294 hectares), from Puglia (252,341 hectares) and Calabria (202,119 hectares), which together represent 46% of the total land cultivated with organic agriculture.

The Emilia Romagna region is among the top five regions with 134,509 hectares in total, while Lombardy is the region that is experiencing the most growth with an increase of 21.4%. The data indicated that organic vegetable production is involving an increasing area of the national territory.

At the end of 2017 organic agriculture was taking place on **15.4% of Italian agricultural land**, a 1% increase compared with 2016. Almost **7,600** companies subscribe to the organic agriculture certification system, an increase of **5.2%**.

#### **Website**

[www.sana.it](http://www.sana.it)

#### **Social Media**

Facebook.com/sanabologna – Twitter.com/sanafiera  
Youtube.com/BolognaFiere – Instagram.com/Sana\_fiera

#### **Press Office SANA**

Absolut eventi&comunicazione  
Mariagrazia Lioce - Sara Telaro  
[ufficiostampa@absolutgroup.it](mailto:ufficiostampa@absolutgroup.it)  
tel. +39 051 272523 / +39 340 9214636

#### **Product Communication and Event Manager**

Isabella Bonvicini  
[Isabella.bonvicini@bolognafiere.it](mailto:Isabella.bonvicini@bolognafiere.it)  
tel. +39 051 282920 / +39 335 7995370

#### **Press Office BolognaFiere**

Gregory Picco  
[gregory.picco@bolognafiere.it](mailto:gregory.picco@bolognafiere.it)  
tel. +39 051 282862 / +39 334 6012743



**BolognaFiere spa**  
Viale della Fiera, 20 - 40127 Bologna, Italia  
Tel. +39 051 282111 - Fax +39 051 6374004  
[segreteria.generale@pec.bolognafiere.it](mailto:segreteria.generale@pec.bolognafiere.it)  
Capitale sociale € 106.780.000,00 i.v.  
C.F. - P.IVA e Reg. Imp. BO 00312600372 - REA BO367296

**Show Office**  
Piazza Costituzione, 6 - 40128 Bologna, Italia  
Tel. +39 051 282111  
Fax +39 051 6374031  
[sana@bolognafiere.it](mailto:sana@bolognafiere.it)  
[www.sana.it](http://www.sana.it)