



31° Salone internazionale del biologico e del naturale
31st International exhibition of organic and natural products

The SANA Observatory 2019: the competitive positioning of 'Made in Italy' organic products on foreign markets

The current state of the market for organic products will be at the centre of the SANA 2019 Observatory scheduled to take place on Friday 6 September (at 3.30 pm in the Sala Notturmo); promoted by BolognaFiere and curated by Nomisma with the involvement of FederBio and AssoBio and the support of ITA, the Italian Trade Agency, the SANA Observatory is the tool that monitors the key numbers relating to the organic sector, from production to market dimensions

Through a dedicated in-depth study of the dimensions of Italian exports of organic food products, the SANA 2019 Observatory will also focus on the competitive positioning of 'Made in Italy' organic products on foreign markets, with a detailed look at Russian and Japanese markets, which will be illustrated during talks by Giuseppe Russo, Head of Food at the ICE office in Moscow, and Toshiko Omichi, Senior Trade Analyst at the ICE office in Tokyo, who will both be taking part in the debate.

Alongside the analysis of forecasts for 'Made in Italy' organic products on international markets, the SANA Observatory 2019 will also present the key numbers relating to the organic sector in Italy and the results of the survey of Italian consumers that each year provides a map of the new consumption trends in the domestic market.

The Observatory will propose, in particular, analysis of:

- key statistics for the sector, the area of land involved in production, production chain data (number of agricultural producers and transformers), and consumption
- the organic consumer: purchasing behaviour, requirements and motivations

In parallel, the 2019 in-depth analysis will concern the "Dimensions and trends of exports of 'Made in Italy' Organic products"

The two goals of the 2019 edition of the SANA Observatory focus on:

- gathering the key statistics to monitor the dimensions of Italian exports of organic food products, the main destination markets and the role of the various categories of products exported
- identifying the requirements of the companies that export organic food products and the most appropriate tools to support the progress of companies on international markets

ORGANIC FOOD: THE TRENDS

In 2018 sales of organic food products of all types and in all channels (grocery retail, specialised organic retail points, neighbourhood stores, commercial restaurants, markets and G.A.S (*Gruppi di Acquisto Solidale* - Ethical purchasing Groups) totalled 4,089 million euros, an increase of 5.3% on 2017 (based on the same perimeter of sales channels analysed) and with growth in the last decade equal to 171%.

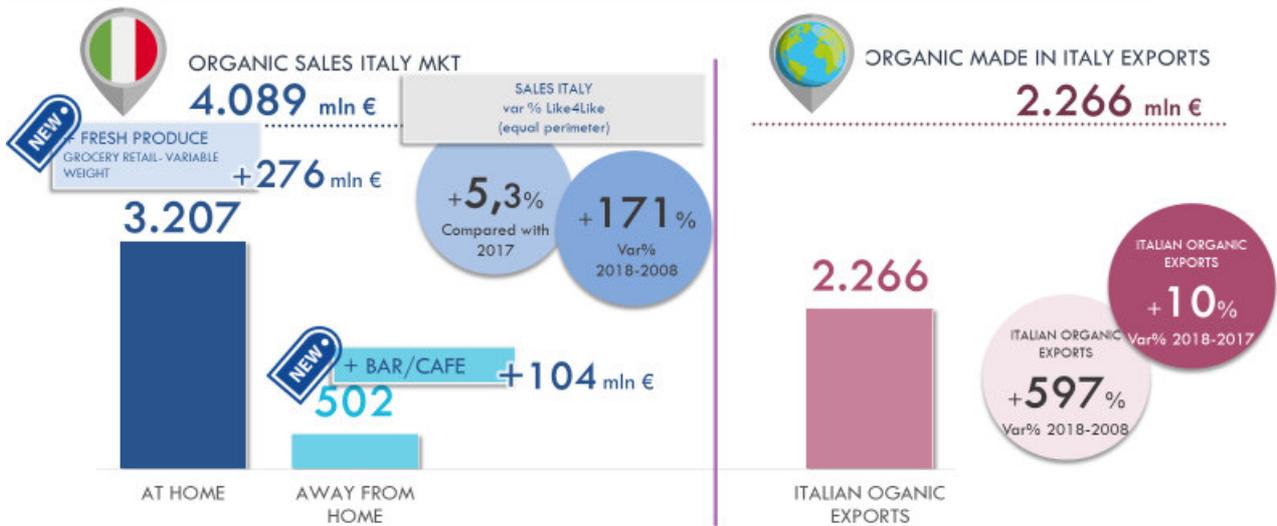


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NOMISMA PER OSSERVATORIO SANA 2019

MARKET DIMENSIONS 2018

SOURCE: Nomisma with data from NIELSEN, AssoBio, Survey Imprese NOMISMA for SANA Observatory 2019



Source: Nomisma using data from NIELSEN, AssoBio, NOMISMA business survey for the SANA 2019 OBSERVATORY

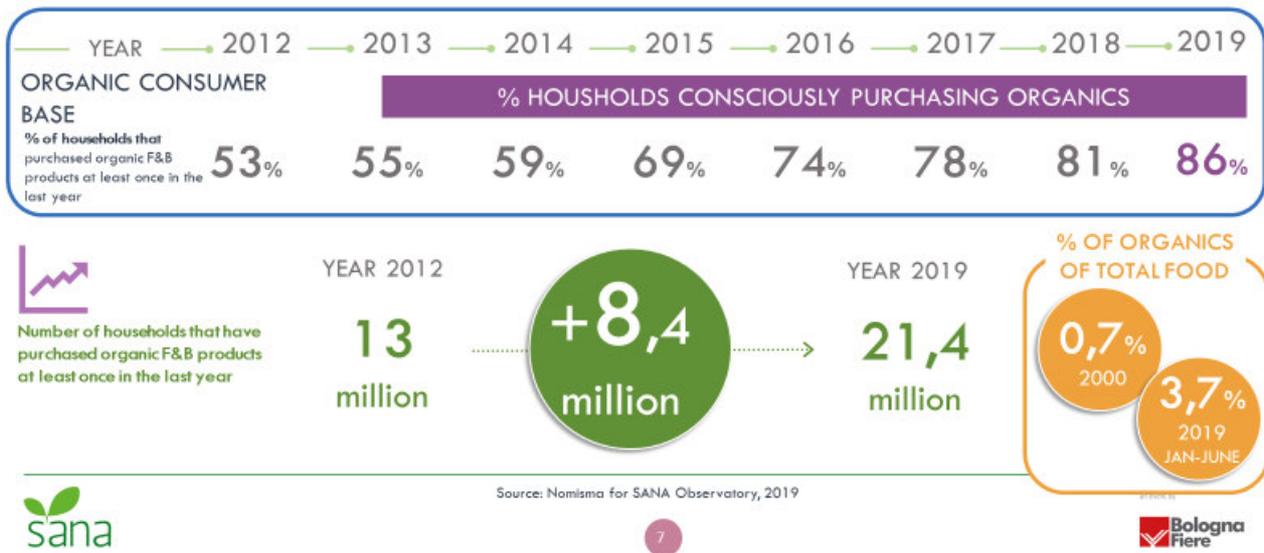
ORGANIC EXPORTS

This positive performance is not confined solely to the domestic market. The export of Italian organic food products reached 2.3 billion euros in 2018, registering further growth (+10% compared with 2017) and achieving a significant role among the range of 'Made in Italy' products (5.5% of total Italian food exports). Growth that is clearly even more impressive than that for Italian food exports as a whole, which exceeded a figure of 41 billion euros in 2018, an increase of +1.3% on the previous year.

ORGANIC PRODUCTS IN ITALIANS' SHOPPING TROLLEYS

Organic products are increasingly present in the homes of Italians: 86% of Italians purchased an organic product at least once in 2018 (in 2012 organic purchasing households represented 53% of the total, indicating an increase of 8.4 million purchasing households in just 7 years!) and 51% claimed that they consumed organic food products at least once a week.

ITALIANS AND ORGANICS: How demand has changed è



Source SANA-NOMISMA Observatory 2019

The growing consumer base demonstrates that organic products are an increasingly more widespread and appreciated option. The reasons for this are mainly related to health and the environment but also the growing awareness of issues such as sustainability, guarantees of safety and quality as well as safeguarding ecosystems.

Italians choose organic products because they respond to meaningful values: 52% purchase organic products for health reasons, 47% because they offer greater safety and quality guarantees, 26% because they respect the environment and pollute less.

Nowadays organic products are diffuse and widespread across all distribution channels, underlining the fact that for consumers, having organic products on the shelves is a prerequisite.

Evidence of this can be found in the assortments in grocery retail: in 2018 the retail groups involved in grocery retail offered a total of 4,323 organic references, +28% compared with the previous year, with an average number of references per retail point of 161 units (Source: Bio Bank).

Sales are also experiencing parallel growth: set weight products sold through grocery retail (hypermarkets, supermarkets, free service, small and discount supermarkets) generated sales of 1.658 billion euros (year ending June 2019, source: Nielsen), with an increase of 5.9% compared with the same period last year. Also increasing is the share of organic products in the average food shopping basket: today equal to 3.7% (in 2000 this was 0.7%), source: Nielsen). Eggs (98 million euros, year ending June 2019, source: Nielsen), fruit-



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based spreads (89 million euros) and rice cakes (51 million euros) were the leading product categories that have driven sales of organic products in the grocery retail sector.

For further information

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