OSSERVATORIO SANA

DEVELOPED BY

IN COLLABORATION WITH CON

POWERED BY

THE ITALIAN ORGANIC MARKET

OSSERVATORIO SANA

Bologna Fiere

POWERED BY

Nomisma

THE ORGANIC MARKET

(SALES 2022, YTD JANUARY 2023)

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

BEING ORGANIC in EU

ORGANIC SALES MARKET ITALY

5,056 mln €

+132%
Var. % L4L
2022-2012

VAR. %
2022-2021
Like4Like

-0.2%

3,982

AT HOME*

1,074

VAR. %
2022-2021
Like4Like

+53%

AWAY FROM HOME

EXPORT MADE IN ITALY ORGANICS

3,372 mln €

+181%
Var. %
2022-2012

+16%

3,372

EXPORT Organic Food
Made in Italy

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

www.ita.bio

ITA.BIO

PERIMETER:

* Including
- Super fresh
- E-commerce

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

osservatori@nomisma.it

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

Nomisma

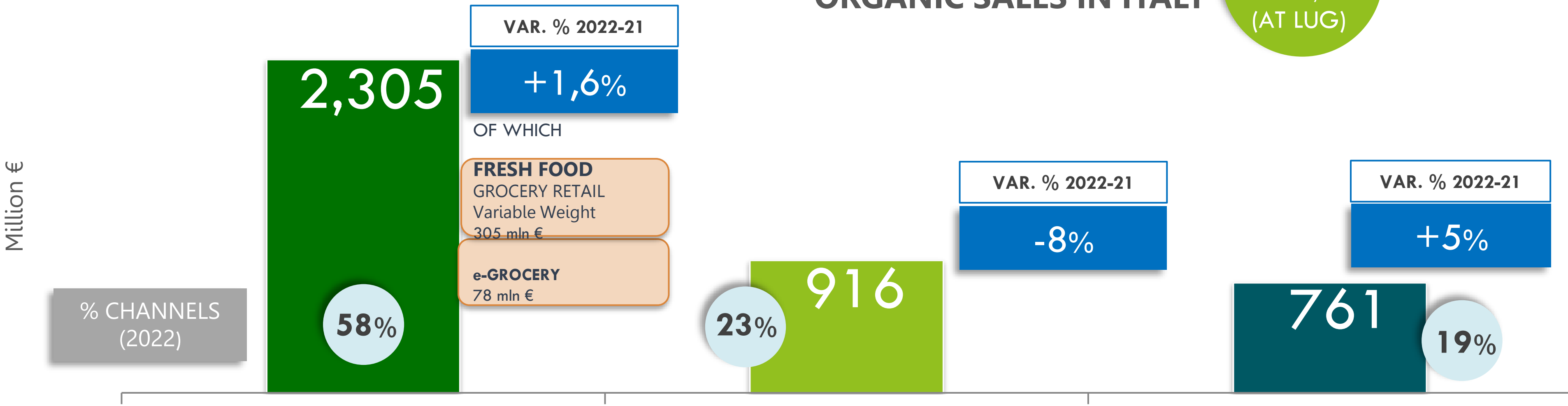
ITALY. "AT HOME" CONSUMPTION & CHANNELS

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

3,982 mln €

-1.1%
L4L 22/21
(AT LUG)

ORGANIC SALES IN ITALY



Grocery Retail

I+S+Superettes+Discount
+Drug Spec. + egrocery

Specialized Organic Shops

Other channels

PERIMETER:
neighborhood shops, pharmacy, markets, purchasing groups …

osservatori@nomisma.it

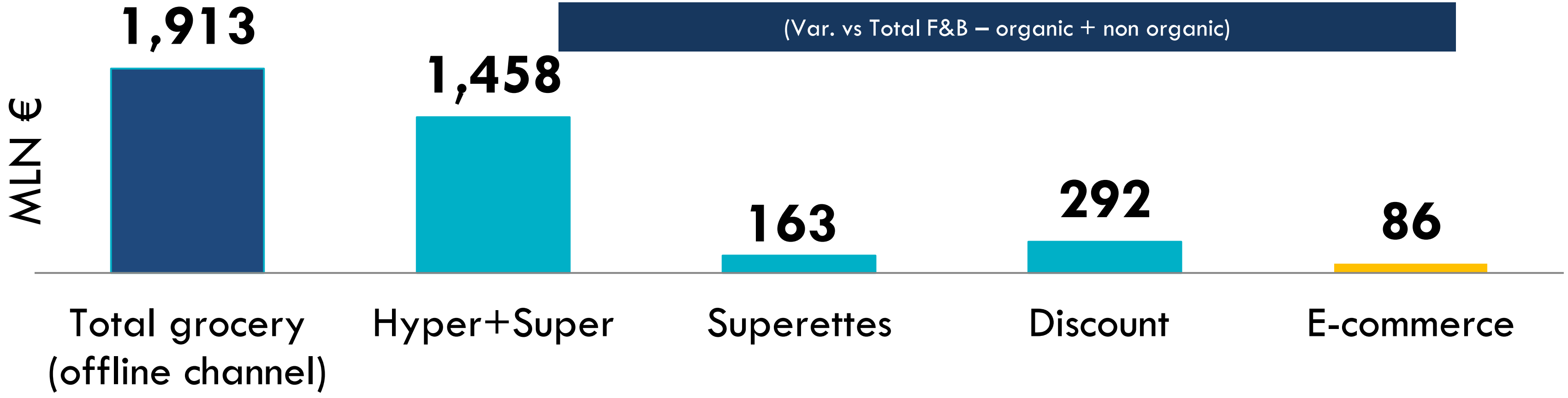
Fonte: SANA observatory 2022-Nomisma - elaborazioni on Nielsen data, AssoBio, Ismea

GROCERY RETAIL: SALES PER CHANNEL

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

	Total grocery (offline channel)	Hyper+Super	Superettes	Discount	E-commerce
VAR. VAL % 2022-21	+1.6%	+0.5% (+6.9%)	+1.8% (+4.3%)	+16% (+12.1%)	+0.1% (+4.5%)
VAR. VOL % 2022-21	+1,5% (+0,4%)	+4.2% (+0,4%)	+4.0% (+2.5%)	+9.9% (+1.5%)	+6.1% (+3.6%)

(Var. vs Total F&B – organic + non organic)



Fonte: Nomisma on Nielsen data

Nomisma

osservatori@nomisma.it

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)

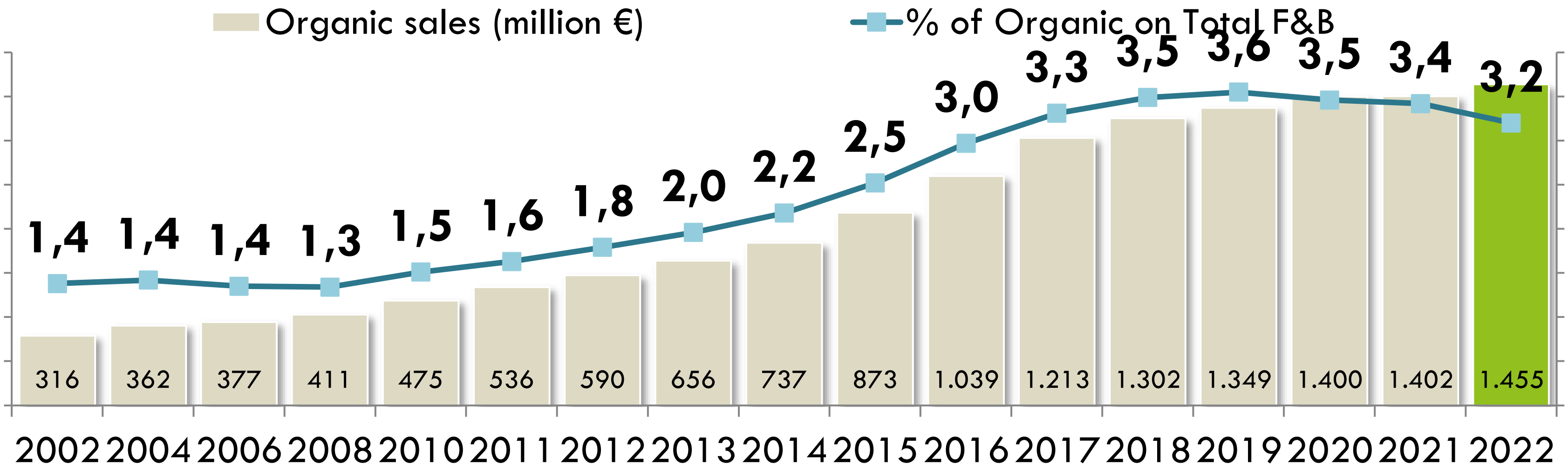
+4.3%

HEALTHY BASKET (volumes)

Fonte: Nomisma on Nielsen data

ORGANIC FOOD VS TOTAL FOOD

Hyper + Super



Total	Hyper+Super	Superettes	Discount	E-commerce
2.8%	3.2%	2.2%	1.7%	6.7%

% organic on F&B

Fonte: Nomisma on Nielsen data

SALES AND TRENDS OF THE MAIN ORGANIC CATEGORIES

Hyper + Super – YTD 1 January 2023

Rank	Product (main catagories)	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	VEGETBLES 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%

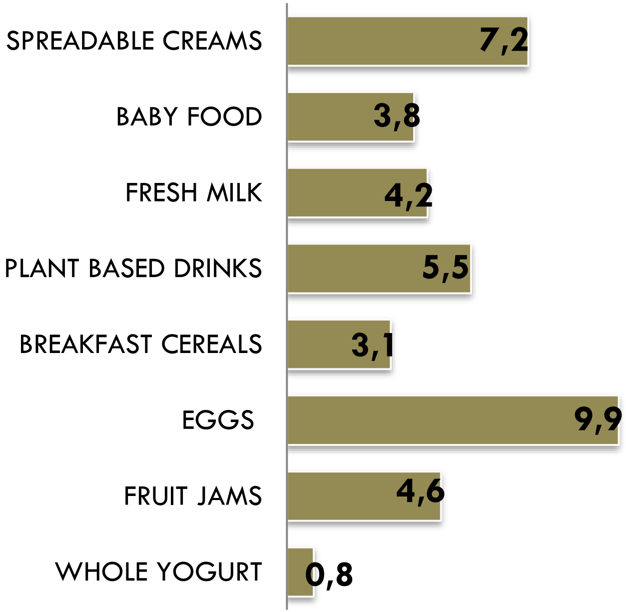
Fonte: Nomisma on Nielsen data

osservatori@nomisma.it

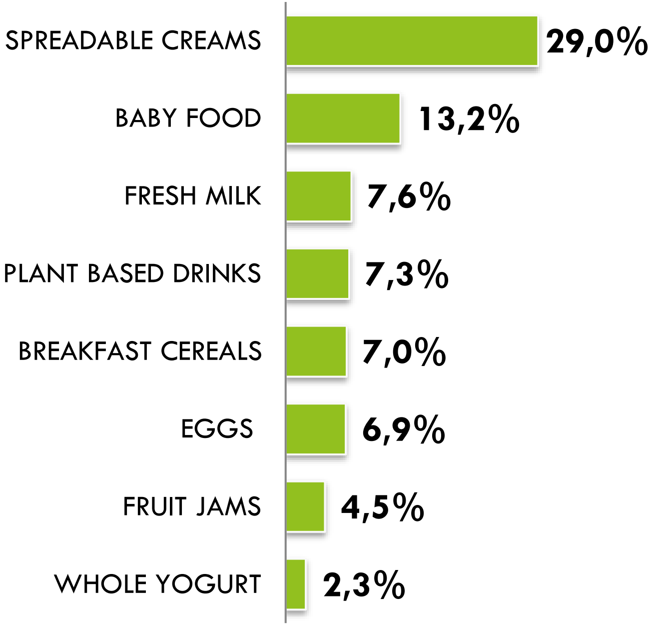
TOP 8 CATEGORIES IN TURNOVER GROWTH 2022-2021

Hyper + Super – YTD 1° January 2023

GROWTH SALES IN VALUES (Mln €)



Var% SALES



Fonte: Nomisma on Nielsen data

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

BEING ORGANIC in EU

THE ITALIANS

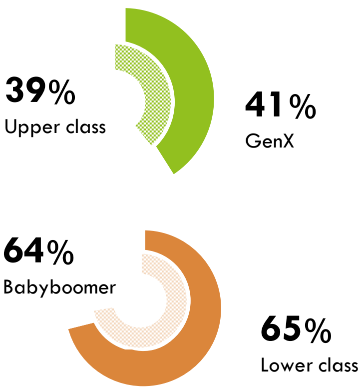
In the next 6-12 months – compared with the last year – which products will you buy in more or less amount? (% of products users)

TOP GROWTH

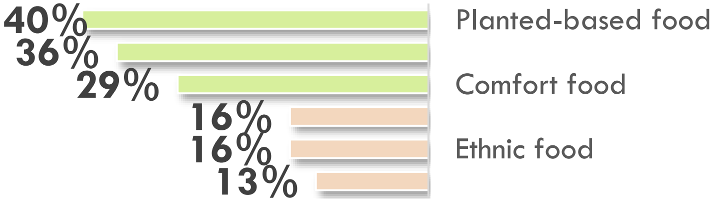
Local / km0	37%
100% italian	35%
Sustainable packaging	33%
Sustainable and environmentally friendly	32%

TOP DECREASE

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

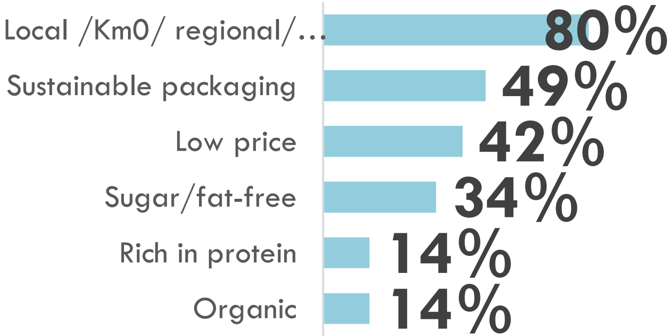


NEW FOOD THAT WILL SET TRENDS IN 2023…

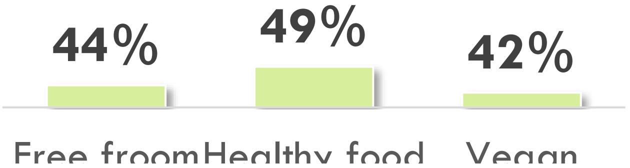


FORECASTS REWARD LOCAL, MADE IN ITALY AND SUSTAINABILITY…

In particular, in order to cope with the crisis and the inflation and in an affort 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 …



osservatori@nomisma.it

Fonte: Nomisma for Rapporto Coop 2022

Nomisma

Per informazioni
@ biologico@nomisma.it

Nomisma | Bologna, Italia
www.nomisma.it

www.ita.bio

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

FEDERAZIONE ITALIANA AGRICOLTURA BIOLOGICA E BIODINAMICA