



Associazione Nazionale
delle **Imprese di Trasformazione e Distribuzione**
dei **Prodotti Biologici**

The SANA Observatory 2021

Organic products: further growth for domestic consumption (+5%) and exports (+11%). The “away from home” segment is growing once more

Total sales of €4.6 billion in the 12 months to July.

Exports of €2.9 billion. Among the Sales channels doing well are specialist shops (+8%), discount supermarkets (10.5%) and ecommerce (+67.3%). Data revealed by Nomisma, with AssoBio and FederBio during the Organic Revolution in Bologna.

- ✓ *“Invest in communication, research and education for a genuine change of step in the domestic market for organic products,” is the appeal from Roberto Zanoni, president of Assobio.*
- ✓ *Now is the best time to enact a cultural revolution involving everyone: institutions, stakeholders and consumers.*
- ✓ *The possibility to recoup certification expenses through tax credits, reducing VAT on organic fruit and vegetables and providing incentives for families that consume organic products are tools that can have a positive impact on consumption and on a market that promotes sustainability, health and food safety.*

Bologna, 7 September 2021 – Also for the 2021 edition, AssoBio is one of the main partners of SANA, the international exhibition of natural and organic products, while also sitting on the Advisory Board of Sanatech, confirming the association’s commitment to representing businesses in the organic sector.

Sana has always been important for the association that today represents 107 companies in the sector (more than 60% of revenues from Italian organic production) and this year the organic sector has a particular role at the forefront of the post-pandemic recovery strategies.

*“In terms of economic, environmental and social sustainability, the role of organic farming has strengthened over the last year thanks to a market that is extremely receptive to organic products and those of Italian origin,” observes **Roberto Zanoni, President of AssoBio**. “This provides special significance to the 2021 edition of Sana, just a few months after the approval in the Senate of the legislation on organic farming, which is now awaiting passage through the Chamber of Deputies. These developments also confirm the credentials of a solid sector with ample opportunities for growth, in addition to the increasingly frequent preference of consumers to choose organic products and share the values they convey”.*

The initiatives put in place by AssoBio in collaboration with Federbio and Nomisma will underline the importance and centrality of the event for the entire supply chain, which has emerged stronger from a year that has severely tested the global economy.

The value of wellbeing at the dining table and the promotion of **‘Made in Italy’ agri-food products**

should be supported with **appropriate training and communication campaigns**, responding to the signal coming from the public and the policies of the European Union. Italian organic products continue to be popular, both in the Italian domestic market and abroad.

These are the findings of the **SANA Observatory** on the key statistics, prospects and role for the sector, now in its third edition on the occasion of **The Organic Revolution**, the General Assembly of the Organic sector, during the 33rd international exhibition of organic and natural products at the Bologna Exhibition Centre.

Overall organic sales are up 5% in Italy and stand at €4.6 billion, considering the 12 months to July 2021. **'Made in Italy' organic exports** also continue to grow: **+11% compared with last year**, totalling €2.9 billion on international markets and confirming Italy's position as Europe's largest exporter of organic exports. The SANA Observatory, conducted by Nomisma in collaboration with AssoBio and FederBio, divides domestic consumption into "domestic" household consumption, amounting to €3.9 billion (+4%) and "away from home", amounting to €701 million (+10%). Collective and commercial catering began to grow again following the understandable -27% drop (€487 million) recorded in the 2020 edition of the Observatory.

Grocery retail, with 56%, is responsible for the lion's share of the domestic market sales channels: €2.2 billion (+2%) consisting of hypermarkets, supermarkets, minimarts, drug stores, discount stores and e-commerce.

The latter two continue to record the largest increases: +10.7% for low-cost retail outlets (€205 million euros) and +67.3% for online purchases (€75 million). The trend confirms what was observed by AssoBio-Nielsen in the first quarter of 2021 for the two areas (+10.5% and +79%). Also worth noting is the growth of specialised 'organic' shops (+8%), which account for a quarter (26%) of domestic household consumption with almost €1 billion in sales. The remaining 19% (€723 million, +5%), regards neighbourhood shops, minimarkets, pharmacies, and ethical purchasing groups.

But which products can be found in Italians' organic shopping baskets? Considering only pre-packaged goods by weight, the three best-selling items in grocery retail are eggs (€137 million), fruit jams and spreads (€106.5 million) and plant-based drinks (€69 million euros). Grocery products (pasta, bakery products, preserves, sauces, etc.) account for 57% of the total in terms of value, followed by fresh produce with 21% (cheese, cured meats, yoghurt, eggs), fruit and vegetables with 12%, beverages with 6%, and meat with 2%. 54% of the population aged between 18 and 65 are considered "frequent consumers", i.e. they put organic products on the table every day or at least once a week.

*The SANA Observatory has demonstrated once more that organic farming is growing in Italy, as is the case all over the world," Zanoni continued. "But while we are first in Europe for the number of organic farmers (over 70 thousand) and processing companies (over 10 thousand), **per capita expenditure is growing more slowly**: just €70 compared to €188 in France and €180 euros in Germany (Fibl & Ifoam data, 2021). **Communication, training and university research, educational initiatives in schools** are the fronts on which the Italian government should invest to facilitate a virtuous process in the development of an organic agricultural economy in Italy too. A necessary cultural change, to support producers and distributors committed to providing sustainable goods every day at all levels of the supply chain, from the product to the packaging, as demonstrated by the **'AssoBio Survey on sustainable packaging'**, which we will present at Sanatech"*

Solutions for packaging consistent with organic food will be the main theme of the conference "**Food: Packaging & Organics**", an event that will illustrate the results of an in-depth research project, advocated and supported by the Association in collaboration with Nomisma within the framework of the "Organic Revolution" initiatives, and involving some of the main companies producing organic products, **particularly attentive to sustainable packaging.**

The appointment is for Friday 10 September at 2.30 pm, at the Open Theater in the Service Centre.