

THE SANA OBSERVATORY 2018: ORGANICS, THE SPECIALIZED CHANNEL AND ITS CUSTOMERS

On 7 September, on the opening day of SANA, the International Exhibition of Natural and Organic Products, the latest data collected by Nomisma about Italian organic food sector will be presented.

The Focus of the 2018 report is on consumer purchasing habits and the specialized retail points' responses to the evolving requirements of their clientele.

“All of the numbers of Italian organics: the consumer drivers and the innovations from the specialized channel”: this is the title of the **2018 SANA OBSERVATORY**, the annual in-depth examination of the most influential themes concerning the Italian organics market. Promoted by **BolognaFiere** with the support of **FederBio** and **AssoBio**, the Observatory is compiled by Nomisma and this year will focus on consumers of organic products, their purchasing habits, the motivations behind their choices and the strategies and proposals of the specialized retail channels.

The survey, carried out on a sample of 200 retail points specialized in organic products, has enabled the evaluation of diverse factors such as the characteristics of the retail points, their product ranges and the services offered to their clientele, the progress of sales and the perception of the market's latest challenges.

The retail points, the statistics and the commercial offer

With a total of 1437 specialized shops in 2017, the number of such outlets is 13% higher than in 2013 and 11% higher compared with 1993 (source: BIOBANK). Of these, 60% 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 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 offer from that of the grocery retail 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 that customers found most interesting were considered to have properties beneficial to health (indicated by 34% of retail points) and “vegan” attributes (36%).

The customer: motivations for purchase and the relationship with retail points

The Nomisma survey also identified the typical clients at specialized retail points: women were the prevalent gender according to 79% of respondents, the an 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.

This and much more data – including the most recent statistics compiled by **SINAB, the National Information System for Organic Agriculture for MIPAAFT, the Ministry of Agricultural Policy, Forestry and Tourism Policy and ISMEA, the Institute of Services for the Food Agriculture Market** – will be presented on Friday 7 September at 2.30pm in the Sala Notturmo of the Bologna Exhibition Centre on the occasion of the 30th edition of SANA. A key appointment for all those with an interest in the sector, and one that contributes to underlining the key role of the event for the natural and organic market in Italy and around the world.

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www.sana.it

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