

ORGANIC FOOD SECTOR GROWING IN ITALY AND ABROAD

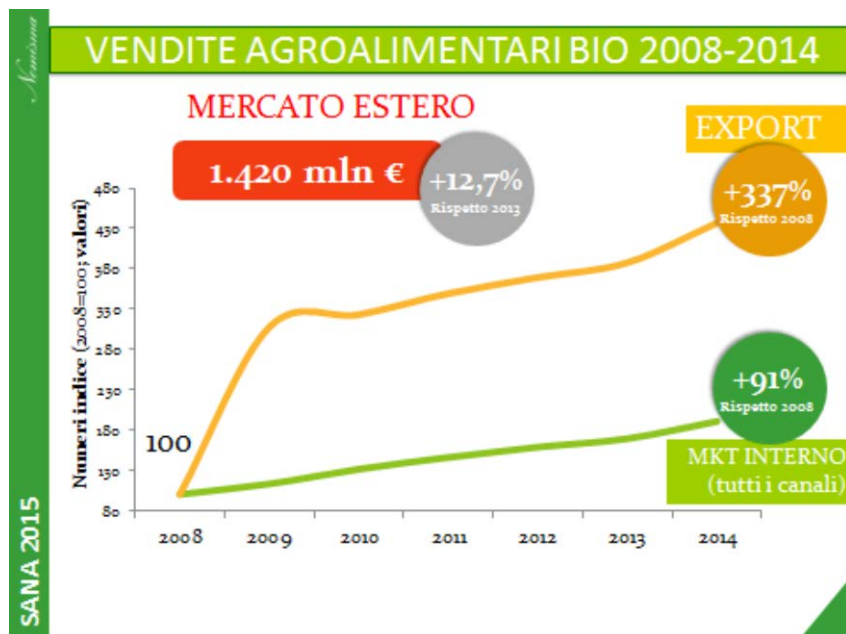
SANA OBSERVATORY, UNRIVALLED GROWTH: +337% SINCE 2008

1.4 BILLION IN REVENUES IN 2014, 24% OF THE TOTAL

The Italian organic production chain is in rude health. Land, producers, retail points, large-scale distribution and the restaurant sector: all these indicators have shown increases also for the year 2014. The most surprising trend, however, is in the final market showing demand recorded in key data from the production chain: the demand for organic branded products has risen constantly since 2005.

The organic food sector continues to show great potential that extends beyond national borders: the results of the SANA Observatory 2015, managed for the fourth consecutive year by *Nomisma*, shows that exports are growing strongly.

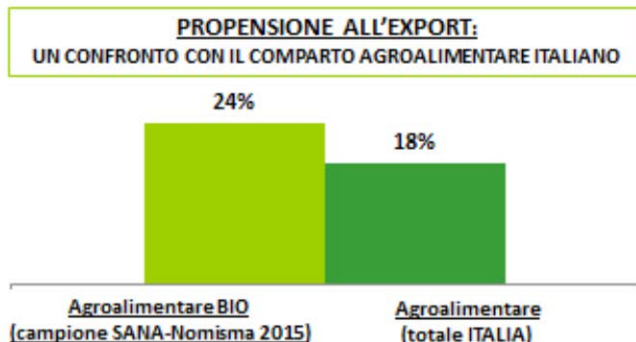
In 2014 sales of organic certified Italian food products abroad were worth 1.4 billion euro. The proportion of revenues generated from exports is also impressive for organic companies with 24% of the total from exports compared with 18% for the Italian food production market as a whole. What stands out for the organic companies is their capacity to reach international markets: 80% of companies have made sales outside Italy during 2014.



Source: Nomisma for SANA Observatory SANA 2015

BIO: I NUMERI CHIAVE DEL CAMPIONE SANA-NOMISMA

Imprese del campione (numero)	150
Fatturato agroalimentare BIO del campione (mIn €; 2014)	959,6
Vocazione al BIO delle imprese del campione (Quota fatturato BIO su totale fatturato agroalimentare%; 2014)	50%



Source: *Nomisma* for SANA Observatory SANA 2015

This is the conclusion of research carried out by the SANA Observatory and *Nomisma* that involved a sample of 150 companies with revenues from the organic certified food sector totalling 1 billion euros.

The results of the SANA Observatory and ICE will be presented to the operators and the media at a meeting that will take place on the 12th September of the 2015 edition of SANA, together with the data from SINAB on the total land cultivated according to organic methods and the data from ISMEA on consumption of products in large scale retail distribution.

SANA OBSERVATORY 2015

The monitoring of the Italian organic food sector abroad: the main objective of the SANA Observatory 2015, promoted by BolognaFiere's Exhibition of Natural and Organic Products and ICE (the Agency for the promotion abroad and the internationalization of Italian companies), in cooperation with *FederBio* (the Italian Federation of Organic and Biodynamic Agriculture) and *Assobio* (the National Association of companies involved in the transformation and distribution of natural and organic products) and carried out by *Nomisma*, the independent research organization specialized in the analysis of the food sector and with years of experience of analysing the organic production chain. The observatory serves as a necessary tool to identify the requirements of companies that export organic certified food products, the areas for improvement and the most appropriate tools to support business, through the collection of key data relating to Italian exports of organic certified food products, the definition of the main destination markets, their dimensions and



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their features in terms of consumption and the role of the different categories of product exported.

In the year of **EXPO**, the huge **international showcase** for the key players and companies in Italian organics at the **Organic and Natural Pavilion** at **Biodiversity Park**, the themed area at **EXPO**, designed and created by BolognaFiere and during a period of growth for Italian organics, a symbol of food security and quality, both in our country and in numerous other nations, the monitoring of Italian organic agriculture abroad represents a key strategy to support the operators and businesses that will be able to take advantage of the data and analysis of the opportunities for the internationalization of organic products abroad.

Currently the absence of a classification of customs codes for organic certified products limits the continuous study of import-export flows; the data collected and the results of the **SANA Observatory constitute a unique trove of information capable** of providing clear answers to the requests of Italian businesses interested in the business opportunities in the organic sector in foreign markets in the short term and to define specific approaches to support the export activities of Italian businesses.