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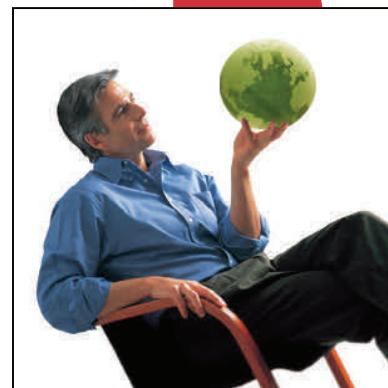
Agriculture et
Agroalimentaire Canada



**International
Markets
Bureau**

MARKET INDICATOR REPORT | APRIL 2012

Organic Packaged Food in Italy





► **EXECUTIVE SUMMARY**

The organic packaged food market in Italy is relatively nascent, with many sectors recording double digit growth and introducing new innovative products, despite the economic downturn. Key factors behind the growth of the organic sector have been product diversification and rising demand for higher priced products following changing consumer attitudes towards food. Italians are paying more attention to eating healthy foods, as well as those that are certified organic, and producers are taking note. New brands have been introduced in line with growing demand, and manufacturers who had previously produced regular products are branching into organic food.

An improvement in the overall economic environment should further encourage the growth of other organic products in Italy. Better economic conditions will help lower consumer price sensitivity, and increase their willingness to pay a premium for organic products. Alternatively, a prolonged economic downturn may negatively affect growth projections.

“Greener” and more convenient food is gradually becoming a first choice among the average Italian consumer. Interestingly, industry sources have noticed a matching increase in the consumption of both organic and convenience food and expect the two to merge together to supply time-poor consumers keen to opt for greener choices, but who are only prepared to pay a small premium for organic varieties.

Overall, organic packaged food is still an emerging segment and there are still many categories where organic food has yet to become available. Therefore, the opportunities for development are extensive.

One of the major obstacles to the increase in demand of organic products in Italy is the consumers' lack of information. Many believe that organic products are only produced in Italy, and are not aware that imported products could be labelled as "organic."

Education is the key to gaining new customers and persuading them to buy organic food, despite it being much more expensive than standard food. Therefore, promoting organics through the press, the Internet, television or other mass media is necessary to raise awareness among adults.

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► MARKET TRENDS

Organic foods continue to have niche positioning in Italy. Consumers who purchase organic products perceive them to be higher in quality, more appetizing, and healthier than standard alternatives. However, as 2009 sales results indicate, Italian consumers are increasingly price sensitive and less willing to pay a premium for organic.

Euromonitor reports that 46.5% of Italians aged 15 or over are overweight or obese. With excess weight a growing concern, Italian consumers have become increasingly selective about their food choices, not only when buying their produce, but also when dining out. Healthy food has become specifically associated with a dynamic and positive lifestyle, as well as a productive workforce. Over the past five years, organic food has consolidated its value share in overall food.

As the popularity of organic products grows in many product categories, another segment of the organic sector has begun to develop during the economic downturn. The increasing popularity of private label brands has continued to diversify in the organic sectors. The effect of this, however, was the decrease in unit prices for many product categories, leading to a decrease in overall value growth.

The largest concentration of consumers buying organic products is in the northern regions of Italy, where the industrial and economic structure is stronger. However, most organic products are produced in the south, where it is warm and more agriculturally oriented. The average consumer of organic products is between 30 and 60 years old, lives in a city or large town in the north of the country, has an average or higher-than-average education, and is in the upper-middle or upper income bracket.

Consumers are somewhat willing to pay a premium price for organics, justifying the additional cost with the perceived health-related benefits of organic products. A 2001 survey by Demoskopea showed that 73% of Italians could define organics and know some key organic characteristics (no chemicals, more natural); 22% gave correct but vague definitions (healthy, genuine, safer). Moreover, a 2004 Ispo survey found that 77% of Italian adults think organic food is healthier, 64% believe that organic food is different from conventional, 63% think organics taste better, 75% think that organic production is safer for the environment, and 80% think organic products are expensive. The same survey found that 68% of Italians are surely (26%) or maybe (42%) willing to pay a higher price to eat high quality, better tasting and ecologically sound food. Today, premium prices for organic products still apply, especially at the retail level for processed imported goods. Imports are quite important for processed goods, except for pasta and noodles (of which Italy is a net exporter), and fruits and vegetables.

**Italian Market Sizes – Organic and Regular Packaged Food
– Historic/**Forecast** Retail Sales Value in US\$ millions**

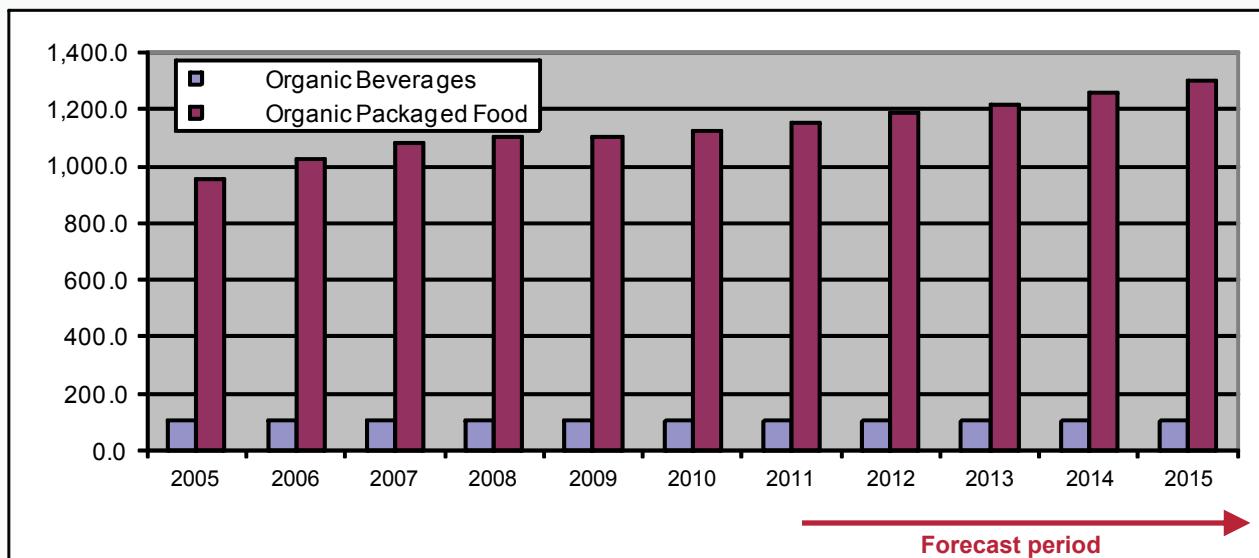
	2007	2008	2009	2010	2011	2012	2013	2014	2015
Packaged Food	79,404	82,858	83,878	85,066	87,162	89,072	91,047	93,085	95,229
Organic Packaged Food	1,027	1,079	1,088	1,127	1,174	1,227	1,286	1,352	1,423
Organic as a % of Packaged Food	1.2	1.3	1.3	1.3	1.3	1.4	1.4	1.4	1.4

Source: Euromonitor, 2012.

► ORGANIC PACKAGED FOOD SALES



Organic Food and Beverages Sector in Italy
– Historic/**Forecast** in US\$ millions



Italian Organic Food and Beverages Market Sizes
– Historic/**Forecast** Retail Sales Value in US\$ millions

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Organic Beverages	97	98	99	100	101	103	105	107	110	114	117
Organic Packaged Food	871	952	1,027	1,079	1,088	1,127	1,174	1,227	1,286	1,352	1,423

Switzerland – Sales of Organic Packaged Food by Subsector
– Historic/**Forecast** Value Growth in % Rate and US\$ millions

Subsector	2005-2010 CAGR* %	2005-2010 Absolute (US\$ millions)	2011-2015 CAGR* %	2011-2015 Absolute (US\$ millions)
Organic Baby Food	0.4	1.3	2.6	7.5
Organic Bakery Products	2.3	8.6	3.7	13.1
Organic Confectionery	0.2	0.2	2.5	3.0
Organic Dairy Products	2.6	29.3	4.8	51.5
Organic Ice Cream	-	-	-	-
Organic Oils and Fats	4.9	33.6	3.6	25.0
Organic Ready Meals	11.5	127.2	7.0	99.7
Organic Rice	1.6	0.5	8.5	2.9
Organic Sauces, Dressings and Condiments	4.9	6.7	6.1	8.8
Organic Snack Bars	-	-	-	-
Organic Soup	5.9	1.4	5.3	1.4
Organic Spreads	7.1	20.9	5.3	17.7
Organic Sweet and Savoury Snacks	4.7	5.4	5.5	6.5
Other Organic Food	4.4	20.2	2.9	12.7

*CAGR = compound annual growth rate

Source for all: Euromonitor, 2012

► ORGANIC PACKAGED FOOD SALES (continued)



**Italian Organic Packaged Food Market Sizes
– Historic/ Forecast Retail Sales in US\$ millions**

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Organic Packaged Food	871.3	952.2	1027.3	1079.3	1087.6	1126.7	1173.8	1227.2	1286.2	1352.2	1423.4
Organic Baby Food	66.1	66.1	66.7	67.5	63.7	67.4	68.6	70.0	71.8	73.9	76.1
Organic Milk Formula	37.3	36.4	36.8	37.1	37.2	37.7	38.5	39.6	40.9	42.3	43.8
Organic Dried Baby Food	1.6	1.6	1.5	1.3	1.2	1.3	1.5	1.7	1.9	2.1	2.3
Other Organic Baby Food	12.8	13.2	13.1	13.1	13.1	13.1	13.2	13.5	13.7	14.1	14.5
Organic Prepared Baby Food	14.4	14.9	15.4	15.9	12.3	15.	15.3	15.3	15.3	15.4	15.5
Organic Bakery Products	72.3	75.0	77.8	79.6	79.0	80.9	83.4	86.2	89.3	92.8	96.5
Organic Biscuits	36.2	38.6	40.1	41.7	41.3	42.8	44.4	46.2	48.1	50.3	52.5
Organic Bread	15.2	15.6	17.2	17.3	17.2	17.6	18.0	18.5	19.0	19.5	20.2
Organic Breakfast Cereals	3.2	3.2	3.3	3.3	3.5	3.7	4.0	4.3	4.6	4.9	5.2
Organic Cakes	17.8	17.7	17.2	17.3	16.9	16.9	17.0	17.3	17.6	18.1	18.6
Organic Confectionery	28.3	28.6	28.9	28.7	28.3	28.6	29.0	29.7	30.4	31.2	32.1
Organic Chocolate Confectionery	24.1	24.4	24.6	24.5	24.2	24.6	25.1	25.6	26.3	27.1	27.9
Organic Sugar Confectionery	4.2	4.2	4.2	4.2	4.1	4.0	4.0	4.0	4.1	4.1	4.2
Organic Dairy Products	211.3	219.5	228.3	234.2	235.0	240.6	249.6	260.5	272.8	286.6	301.1
Organic Cheese	25.0	25.7	26.3	27.0	27.3	28.4	29.5	30.8	32.3	33.9	35.7
Organic Cream	2.5	2.7	2.9	2.9	3.0	3.0	3.1	3.2	3.3	3.4	3.6
Organic Milk	137.5	142.5	148.2	152.4	154.6	158.9	164.8	171.5	179.1	187.8	196.7
Organic Soy Milk	-	-	1.9	2.0	2.1	2.1	2.2	2.2	2.3	2.4	2.5
Organic Yogurt	46.3	48.6	49.0	49.8	48.0	48.2	50.0	52.7	55.7	59.1	62.7
Organic Oils and Fats	125.6	138.5	148.1	156.3	154.6	159.1	164.6	170.8	177.1	183.3	189.7
Organic Butter	31.7	32.6	32.4	32.2	32.0	32.2	32.8	33.4	34.1	35.0	35.9
Organic Olive Oil	85.1	95.7	105.3	113.5	112.0	115.9	120.4	125.4	130.4	135.2	140.1
Organic Vegetable and Seed Oil	8.8	10.1	10.4	10.6	10.6	11.0	11.4	11.9	12.5	13.1	13.8
Organic Ready Meals	176.6	210.4	254.1	279.8	289.5	303.8	321.9	343.1	366.6	392.8	421.7
Organic Rice	6.3	7.1	6.4	6.6	6.1	6.9	7.5	8.2	8.9	9.6	10.4
Organic Sauces, Dressings and Condiments	24.7	28.3	29.0	30.3	30.4	31.4	32.9	34.8	36.8	39.1	41.7
Organic Soup	4.3	5.3	5.7	5.6	5.5	5.8	6.0	6.3	6.6	7.0	7.4
Organic Spreads	50.8	55.8	59.0	63.2	67.4	71.7	76.3	80.0	83.8	88.7	93.9
Organic Honey	14.7	18.2	19.5	20.6	23.1	25.4	27.8	29.2	30.5	32.6	34.8
Organic Non-Honey Spreads	36.1	37.6	39.6	42.6	44.3	46.3	48.4	50.8	53.3	56.1	59.1
Organic Sweet and Savoury Snacks	36.1	37.6	39.6	42.6	44.3	46.3	27.2	28.6	30.1	31.8	33.7
Organic Fruit Snacks	9.4	10.5	10.3	10.4	11.0	11.6	12.4	13.3	14.3	15.5	16.7
Organic Nuts	11.2	12.6	13.7	13.9	14.1	14.5	14.9	15.3	15.8	16.4	17.0
Other Organic Food	84.2	94.6	99.4	103.2	103.1	104.4	106.6	109.0	112.0	115.4	119.3

Source: Euromonitor, 2012.

► KEY MARKET SEGMENTS



Italian Organic Packaged Food Market Sizes
– Historic/**Forecast** Retail Volume in '000 Tonnes

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Organic Packaged Food	177.7	188.3	200.8	202.5	203.4	207.3	212.3	218.0	224.3	231.4	238.7
Organic Baby Food	4.0	4.1	4.0	4.0	3.9	4.0	4.1	4.1	4.2	4.3	4.3
Organic Milk Formula	1.6	1.7	1.7	1.7	1.7	1.7	1.7	1.8	1.8	1.9	1.9
Organic Dried Baby Food	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Organic Baby Food	1.5	1.6	1.5	1.5	1.5	1.5	1.5	1.6	1.6	1.6	1.6
Organic Prepared Baby Food	0.8	0.8	0.8	0.8	0.6	0.7	0.7	0.7	0.7	0.7	0.7
Organic Bakery Products	12.4	12.7	13.9	14.2	14.1	14.3	14.6	14.9	15.2	15.6	15.9
Organic Biscuits	4.7	5.0	6.0	6.3	6.2	6.4	6.5	6.7	6.9	7.1	7.4
Organic Bread	5.8	5.8	5.9	5.9	5.9	5.9	6.0	6.1	6.2	6.2	6.3
Organic Breakfast Cereals	0.5	0.5	0.5	0.5	0.5	0.6	0.6	0.6	0.6	0.7	0.7
Organic Cakes	1.4	1.4	1.5	1.5	1.4	1.4	1.5	1.5	1.5	1.5	1.5
Organic Confectionery	1.3	1.3	1.3	1.3	1.2	1.2	1.2	1.3	1.3	1.3	1.3
Organic Chocolate Confectionery	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.1	1.1
Organic Sugar Confectionery	0.3	0.3	0.3	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Organic Dairy Products	91.3	93.1	97.2	97.9	98.5	100.2	102.6	105.4	108.6	112.2	115.8
Organic Cheese	1.6	1.6	1.7	1.8	1.8	1.9	1.9	1.9	2.0	2.0	2.1
Organic Cream	0.4	0.4	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
Organic Milk	82.3	83.8	86.7	86.9	87.6	89.0	91.1	93.5	96.2	99.3	102.4
Organic Soy Milk			0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6
Organic Yogurt	7.0	7.2	7.7	8.1	8.1	8.3	8.5	8.9	9.3	9.7	10.1
Organic Oils and Fats	16.2	18.0	19.7	20.1	19.9	20.4	20.8	21.3	21.9	22.5	23.1
Organic Butter	2.7	2.8	3.1	3.1	3.1	3.1	3.1	3.2	3.2	3.3	3.4
Organic Olive Oil	10.6	11.8	12.9	13.2	13.1	13.4	13.8	14.1	14.5	15.0	15.4
Organic Vegetable and Seed Oil	2.9	3.4	3.7	3.8	3.8	3.8	3.9	4.0	4.1	4.2	4.3
Organic Ready Meals	11.9	14.1	18.5	18.8	19.4	19.9	20.7	21.5	22.5	23.5	24.7
Organic Rice	1.6	1.8	1.6	1.6	1.4	1.6	1.7	1.8	1.9	2.0	2.1
Organic Sauces, Dressings and Condiments	4.7	5.2	5.6	5.5	5.4	5.5	5.6	5.7	5.8	6.0	6.1
Organic Soup	0.4	0.5	0.6	0.7							
Organic Spreads	10.4	11.1	11.6	12.0	12.4	12.8	13.2	13.6	14.1	14.5	15.0
Organic Honey	1.0	1.4	1.5	1.6	1.8	1.9	2.1	2.3	2.4	2.6	2.7
Organic Non-Honey Spreads	9.4	9.7	10.1	10.4	10.6	10.8	11.1	11.4	11.7	12.0	12.3
Organic Sweet and Savoury Snacks	1.8	1.9	1.9	1.9	2.0	2.0	2.1	2.2	2.2	2.3	2.4
Organic Fruit Snacks	0.7	0.8	0.7	0.7	0.7	0.8	0.8	0.9	0.9	0.9	1.0
Organic Nuts	1.1	1.2	1.2	1.2	1.2	1.3	1.3	1.3	1.3	1.4	1.4
Other Organic Food	21.7	24.4	24.9	24.6	24.7	24.8	25.2	25.5	26.0	26.6	27.2

Source: Euromonitor, 2012.

► KEY MARKET SEGMENTS (continued)



**Italian Per Capita Expenditure on Organic Packaged Food
– Historic/Forecast in US\$**

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Organic Packaged Food	14.9	16.2	17.4	18.1	18.1	18.7	19.3	20.2	21.1	22.1	23.2
Organic Baby Food	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.2	1.2	1.2
Organic Bakery Products	1.2	1.3	1.3	1.3	1.3	1.3	1.4	1.4	1.5	1.5	1.6
Organic Confectionery	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
Organic Dairy Products	3.6	3.7	3.9	3.9	3.9	4.0	4.1	4.3	4.5	4.7	4.9
Organic Ice Cream	-	-	-	-	-	-	-	-	-	-	-
Organic Oils and Fats	2.1	2.4	2.5	2.6	2.6	2.6	2.7	2.8	2.9	3.0	3.1
Organic Ready Meals	3.0	3.6	4.3	4.7	4.8	5.0	5.3	5.6	6.0	6.4	6.9
Organic Rice	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.2
Organic Sauces, Dressings and Condiments	0.4	0.5	0.5	0.5	0.5	0.5	0.5	0.6	0.6	0.6	0.7
Organic Soup	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Organic Spreads	0.9	1.0	1.0	1.1	1.1	1.2	1.3	1.3	1.4	1.4	1.5
Organic Sweet and Savoury Snacks	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.5	0.5	0.5	0.5
Other Organic Food	1.4	1.6	1.7	1.7	1.7	1.7	1.8	1.8	1.8	1.9	1.9

Source: Euromonitor, 2012.

Year-on-Year Growth (%) of Italian Organic Packaged Food, by Sub-Category

	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
Organic Baby Food	5.9	1.7	2.1	2.5	2.9	3.0
Organic Bakery Products	2.5	3.1	3.4	3.6	3.9	3.9
Organic Confectionery	1.1	1.6	2.1	2.4	2.7	2.9
Organic Dairy Products	2.4	3.7	4.4	4.7	5.1	5.1
Organic Ice Cream	-	-	-	-	-	-
Organic Oils and Fats	3.0	3.4	3.7	3.7	3.5	3.5
Organic Ready Meals	4.9	6.0	6.6	6.8	7.2	7.3
Organic Rice	12.6	9.4	9.0	8.7	8.4	7.7
Organic Sauces, Dressings and Condiments	3.2	4.9	5.6	5.9	6.3	6.5
Organic Soup	4.0	4.6	4.8	5.2	5.5	5.7
Organic Spreads	6.3	6.4	4.9	4.8	5.9	5.9
Organic Sweet and Savoury Snacks	3.9	4.5	5.0	5.3	5.6	5.9
Other Organic Food	1.3	2.1	2.3	2.7	3.0	3.4

Source: Euromonitor, 2012.

► PRICING AND MARKET SHARES



**Italian Retail Sales Price of Organic Packaged Food
– Historic/**Forecast** in US\$ per kg**

	2009	2010	2011	2012	2013	2014	2015
Organic Baby Food	16.4	16.7	16.8	17.0	17.1	17.3	17.5
Organic Bakery Products	5.6	5.7	5.7	5.8	5.9	6.0	6.1
Organic Confectionery	23.0	23.2	23.4	23.6	23.8	24.1	24.4
Organic Dairy Products						*Not calculable	
Organic Ice Cream	-	-	-	-	-	-	-
Organic Oils and Fats	7.8	7.8	7.9	8.0	8.1	8.2	8.2
Organic Ready Meals	15.0	15.2	15.6	15.9	16.3	16.7	17.1
Organic Rice	4.3	4.4	4.5	4.6	4.7	4.8	4.9
Organic Sauces, Dressings and Condiments	5.6	5.7	5.9	6.1	6.3	6.6	6.8
Organic Soup	9.8	10.0	10.2	10.4	10.6	10.9	11.1
Organic Spreads	5.5	5.6	5.8	5.9	6.0	6.1	6.3
Organic Sweet and Savoury Snacks	12.7	12.9	13.0	13.3	13.5	13.7	14.0
Other Organic Food	4.2	4.2	4.2	4.3	4.3	4.3	4.4

Source: Euromonitor, 2012.

***Note:** Unit prices for organic dairy products are not calculable, as they are not all measured in kilograms.

Organic packaged food is currently dominated by domestic players. This is reflective of the perishable nature of organic dairy and the very popular prepared salad ready-meal products, which support local producers. Dairy and ready-meal products dominate Italian organic packaged food sales.

Among new product launches in 2010, La Finestra sul Cielo SpA – an Italian manufacturer specializing in healthy food – presented its Pansoffici di Akrux Bio (Organic Akrux Soft Bread) in 250 g; Pagnotta di Akrux Bio (Organic Akrux Bread Roll) in 350 g; and Pagnotta di Akrux con Semi Bio (Organic Seeds Akrux Rolls) in 350 g under the La Finestra sul Cielo Biomed brand. All three varieties were available in a plastic wrapper. Akrux is a type of organic durum wheat.

Top 10 Brand Shares (by Global Brand Name) in the Italian Organic Packaged Food Market – % Breakdown

Brand	Company name (GBO)	2007	2008	2009	2010
Prima Natura Bio	Granlatte Societá Cooperativa Agricola arl	7.6	7.2	7.3	7.3
Carapelli	SOS Corp Alimentaria SA	4.3	4.1	4.2	4.3
Agnesi	Colussi Group SpA	4.3	4.2	4.2	4.1
Del Verde	Pastificio DelVerde SpA	3.6	3.6	3.6	3.4
Fattoria Scaldasole	Heinz Co, HJ	3.2	3.1	3.3	3.3
Baule Volante	Ecor NaturaSi SpA	-	2.5	2.6	2.7
Ecor	Ecor NaturaSi SpA	-	-	2.4	2.4
Almaverde Bio	Almaverde Bio Scarl	1.6	1.5	1.6	1.8
Ki group	Ki group SpA	1.7	1.6	1.6	1.7
La Finestra sul cielo	La Finestra sul cielo SpA	1.2	1.2	1.3	1.3

Source: Euromonitor, 2012.

► ORGANIC BEVERAGES



Italian Organic Hot Drinks Market Sizes
– Historic/**Forecast** Retail Value in US\$ Millions and % Growth

	Retail Sales Value in US\$ millions					Growth (%)		
	2008	2009	2010	2011	2015	2009-10	2010-11	2011-15
Organic Hot Drinks	50.0	50.3	51.4	52.8	60.7	2.1	2.7	15.0
Organic Coffee	18.8	19.0	19.4	19.9	22.3	1.9	2.4	12.4
Organic Fresh Coffee	17.1	17.3	17.6	18.1	20.3	1.9	2.4	12.5
Organic Instant Coffee	1.7	1.7	1.8	1.8	2.0	2.3	2.7	11.5
Organic Tea	31.2	31.3	32.0	32.9	38.4	2.2	2.9	16.5
Organic Black Tea	22.1	22.0	22.4	23.1	27.0	2.0	2.8	16.8
Organic Fruit/Herbal Tea	8.1	8.2	8.4	8.7	9.9	2.6	2.9	13.6
Organic Green Tea	1.0	1.1	1.1	1.2	1.5	4.0	5.1	31.6

Italian Unit Prices of Organic Hot Drinks
by Sub-Category, Based on Retail Sales Price
– Historic/**Forecast** in US\$ per Kilogram

	2009	2010	2011	2015
Organic Coffee	15.4	15.5	15.7	16.5
Organic Fresh Coffee	14.4	14.5	14.6	15.3
Organic Instant Coffee	57.5	58.8	60.3	66.6
Organic Tea	85.4	86.3	87.5	94.2
Organic Black Tea	74.1	74.8	76.0	83.4
Organic Fruit/Herbal Tea	200.1	202.8	205.8	217.8
Organic Green Tea	37.6	37.8	38.0	39.4
Other Organic Hot Drinks	-	-	-	-

Italian Retail Sales of Organic Hot Drinks
by Sub-Category
– Historic/**Forecast** in US\$ Per Capita

	2009	2010	2011	2015
Organic Coffee	0.3	0.3	0.3	0.4
Organic Fresh Coffee	0.3	0.3	0.3	0.3
Organic Instant Coffee	0.0	0.0	0.0	0.0
Organic Tea	0.5	0.5	0.5	0.6
Organic Black Tea	0.4	0.4	0.4	0.4
Organic Fruit/Herbal Tea	0.1	0.1	0.1	0.2
Organic Green Tea	0.0	0.0	0.0	0.0
Other Organic Hot Drinks	-	-	-	-

Source for all: Euromonitor, 2012

Organic beverages matter to local consumers as they are perceived as being of higher quality. Italian organic beverages tend to be premium in terms of positioning and retail price. However, private label is increasing its value share and is successfully broadening the price spectrum of the organic beverages available in Italy. Private label is predominantly positioned at lower price points to branded alternatives. The growth of private label is gradually helping to increase the appeal of organic beverages.

Organic beverages continued to account for a minor value share of overall organic sales (with 8% value share). This is due to the fact that organic beverages are perceived as expensive in comparison to standard alternatives; it is also because there are still relatively few products available. 2010's growth rate of 2% was marginally higher than the 1% current value compound annual growth rate (CAGR) registered during the past five years. Organic beverages benefitted from a more widespread availability in supermarkets and discounters in 2010. Significantly expanded product ranges, especially regarding private label product ranges, attracted consumers and counteracted the impact of the economic downturn by offering value-for-money organic alternatives.

Organic green tea sales recorded the fastest retail value growth in 2010 at 4%, albeit from a low base. Organic green tea outperformed total organic beverages growth throughout the review period highlighting a product segment still in its infancy.



► ORGANIC BEVERAGES (continued)

**Italian Organic Soft Drinks Market Sizes
– Historic/**Forecast** Retail Value in US\$ Millions and % Growth**

	Retail Sales Value in US\$ millions					Growth (%)		
	2008	2009	2010	2011	2015	2009-10	2010-11	2011-15
Organic Soft Drinks	49.8	50.5	51.2	52.0	56.4	1.4	1.6	8.5
Organic Concentrates	-	-	-	-	-	-	-	-
Organic Fruit/Vegetable Juice	49.8	50.5	51.2	52.0	56.4	1.4	1.6	8.5
Organic 100% Juice	15.2	15.4	15.6	15.8	17.3	1.4	1.6	9.3
Organic Nectars (25-99% Juice)	34.6	35.1	35.6	36.1	39.1	1.4	1.6	8.1
Organic Juice Drinks (up to 24% Juice)	-	-	-	-	-	-	-	-

**Italian Unit Prices of Organic Hot Drinks by Sub-Category Based
on Retail Sales Price – Historic/**Forecast** in US\$ per Litre**

	2009	2010	2011	2015
Organic Concentrates	-	-	-	-
Organic Fruit/Vegetable Juice	3.1	3.1	3.1	3.3
Organic 100% Juice	3.2	3.2	3.3	3.4
Organic Nectars (25-99% Juice)	3.1	3.1	3.1	3.2
Organic Juice Drinks (up to 24% Juice)	-	-	-	-

**Italian Retail Sales of Organic Soft Drinks by Sub-Category
– Historic/**Forecast** in US\$ Per Capita**

	2009	2010	2011	2015
Organic Concentrates	-	-	-	-
Organic Fruit/Vegetable Juice	0.8	0.8	0.9	0.9
Organic 100% Juice	0.3	0.3	0.3	0.3
Organic Nectars (25-99% Juice)	0.6	0.6	0.6	0.6
Organic Juice Drinks (up to 24% Juice)	-	-	-	-

Source for all: Euromonitor, 2012

With manufacturing costs and retail prices on the rise, organic beverages, already at higher price points than their non-organic counterparts, may be limited to those with less restrictive budgets. As the economy rebounds, it is expected that consumers will once again be more willing to try organic beverages, as they will have more discretionary income. Organic beverages are increasingly positioned as a mass-market category and consumer acceptance of organic products will continue to increase over the next five years.



► DISTRIBUTION CHANNELS

Organic beverages are usually purchased in specialized outlets such as Ecor-NaturaSì, KI Groupor Cuorebio, or in hypermarkets, such as Coop, that have their own organic brands. Moreover, supermarkets/hypermarkets usually have the most famous organic brands, namely Almaverde Bio and Valfrutta.

Conserve Italia - Consorzio Cooperative Conserve Italia scarl is the leading company with a 2010 value share of 11%. The domestic player's presence in organic beverages is confined to the Valfrutta brand, which is present in fruit juice.

Private label is also very important in organic beverages, due to the presence of retailers' brands especially in juice. Growth was driven by private label's ability to offer consumers organic beverages at lower price points than branded alternatives. This has become particularly important, given the ongoing impact of the economic recession. There are about 1,000 shops in Italy that specialize in organic food, two thirds of which are located in the north of the country. They are mostly independent shops, smaller than 100 square metres. There are also, of course, larger outlets (between 200 and 500 square metres) and about fifty franchise shops of regional or nation-wide chains. The most important franchisor is Naturasi, with about 30 franchisee superettes (some are butchers, called Carnesi).

**Italian Distribution of Organic Packaged Food
Retail Value RSP – % Breakdown**

	2008	2009	2010
Store-Based Retailing	98.5	98.3	98.2
Supermarkets/Hypermarkets	24.5	26.0	26.0
Discounters	7.0	8.0	9.0
Small Grocery Retailers	64.8	61.8	60.7
Convenience Stores	-	-	-
Independent Small Grocers	61.3	58.6	57.7
Forecourt Retailers	3.5	3.2	3.0
Other store-based retailing	2.2	2.5	2.5
Other Grocery Retailers	-	-	-
Non-Grocery Retailers	2.2	2.5	2.5
Non-Store Retailing	1.5	1.7	1.8
Vending	-	-	-
Home Shopping	-	-	-
Internet Retailing	1.5	1.7	1.8
Direct Selling	-	-	-
Total	100.0	100.0	100.0

Source: Euromonitor, 2012

► CERTIFICATION

Organic food and agriculture in Italy is regulated by European legislation and, in particular, by EU Regulation No. 2092 of 1991, which was integrated into national legislation through the ministerial decrees of August 4, 2000 and March 29, 2001, among others.

► PRICING SAMPLES



The pricing samples below were derived from Euromonitor International, 2011.

Brands	Company name	Outlets	Pack size	Price (EUR)
Organic Fresh Coffee				
Esselunga Bio caffè macinato 100% arabica per moka da agricoltura biologica	Esselunga SpA - Supermercati Italiani	Internet retailing	250 g	2.3
Pellini Bio				
Pellini Bio	Pellini Caffé SpA	Internet retailing	250 g	51.0
Organic Instant Coffee				
Crastan Bio	Crastan SpA	Supermarket/hypermarket	125 g	239.0
Organic Black Tea				
Esselunga Bio e Ctm Altromercato Tè Nero da agricoltura biologica 20 filtri	Esselunga SpA - Supermercati Italiani	Internet retailing	40 g	1.8
NaturaSi	EcorNaturasi SpA	Internet retailing	40 g	2.5
Sì Naturalmente Tè classico Bio	Billa AG	Supermarket/hypermarket	50 g	2.0
Organic Fruit/Herbal Tea				
Esselunga Bio camomilla da agricoltura biologica	Esselunga SpA - Supermercati Italiani	Internet retailing	24 g	1.7
Valverbe	EcorNaturasi SpA	Internet retailing	40 g	25.0
Organic Green Tea				
Coop Vivi Verde Tè verde biologico	Coop Italia SCARL	Supermarket/hypermarket	43.7 g	1.3
Ctm Altromercato	EcorNaturaSi SpA	Internet retailing	40 g	2.0
Sir Winston Tè Verde Altopiano Naigiri India	Pompadour Tè srl	Supermarket/hypermarket	35 g	2.2
Organic 100% Juice				
Almaverde Bio	Almaverde Bio Scarl	Supermarket/hypermarket	3 x 200 ml	2.5
Biotrend succo di mela bio 100%	Lidl Italia srl	Discounter	1 litres	1.4
Esselunga Bio succo di mela 100% da agricoltura biologica	Esselunga SpA - Supermercati Italiani	Internet retailing	750 ml	1.9
Spremuta arance rosse di Sicilia Oranfrizer	Oranfrizer srl	Supermarket/hypermarket	1 litres	2.8
Valfrutta Pura frutta frullata	Conserve Italia - Consorzio Cooperative Conserve Italia scarl	Supermarket/hypermarket	250 ml	1.5
Organic Nectars (25-99% Juice)				
Alce Nero Nettare di pesca bio	Alce Nero	Supermarket/hypermarket	3 x 200 ml	2.1
Coop Vivi Verde alla pesca	Coop Italia SCARL	Supermarket/hypermarket	3 x 200 ml	1.5
Germinal Succo di Mirtilli	Germinal Italia srl	Supermarket/hypermarket	330 ml	5.0
Valfrutta	Conserve Italia - Consorzio Cooperative Conserve Italia scarl	Supermarket/hypermarket	200 ml	2.1
Vivi G Bio	La Doria SpA	Supermarket/hypermarket	200 ml	2.5
Organic Milk Formula				
Hipp 2 proseguimento Bio	HiPP GmbH & Co Vertrieb KG	Health & Beauty Retailer	600 g	9.0
Nidina 2 Confort	Nestlé Italiana SpA	Health & Beauty Retailer	600 g	21.5
Organic Dried Baby Food				
Despar Biologico crema di riso	Despar Italia CARL	Supermarket/hypermarket	220 g	2.9
Hipp Crema di Mais e Tapioca	Hipp GmbH & Co Vertrieb KG	Health & Beauty Retailer	200 g	2.7
Milupa Crema di riso mais e tapioca Bio	Milupa SpA	Supermarket/hypermarket	200 g	2.9
Organic Prepared Baby Food				
Coop Crescendo omogeneizzati di frutta bio	Coop Italia SCARL	Supermarket/hypermarket	2 x 125 g	1.4
Hipp Biologico omogeneizzato di frutta	HIPP GmbH	Supermarket/hypermarket	2 x 80 g	1.4
Plasmon La Frutta dell'Oasi 4 frutti bio	Plasmon Dietetici Alimentari - Plada SpA	Discounter	3 x 120 g	2.2
Other Organic Baby Food				
Hipp Nettare di pera e mela	Hipp GmbH	Health & Beauty Retailer	2 x 200 g	2.3
Organic Biscuits				
Biscotti Novellini Coop Biological	Coop Italia	Supermarket/hypermarket	330 g	1.5
Esselunga Bio biscotti secchi assortiti da agricoltura biologica	Esselunga Spa	Internet retailing	300 g	2.2
Ki La forneria	Ki Group SpA	Supermarket/hypermarket	500 g	2.8
La finestra sul cielo Biscotti Kamut	La finestra sul cielo SpA	Independent small grocers	250 g	3.6
Sendo - Spighe & Spighe	Ki Group SpA	Supermarket/hypermarket	800 g	4.0

► PRICING SAMPLES (continued)



Brands	Company name	Outlets	Pack size	Price (EUR)
Organic Bread				
Baule Volante Pane di Segale	Baule Volante Srl	Internet retailing	500 g	3.0
Dal Cesto di Alice fette biscottate da agricoltura biologica	Grissin Bon SpA	Supermarket/hypermarket	315 g	1.5
Esselunga Bio crackers integrali da agricoltura biologica	esselunga spa	Internet retailing	400 g	2.2
La finestra sul cielo Pane al Kamut	La finestra sul cielo SpA	Independent small grocers	500 g	2.8
Matt&Biofunction craccottini bio al farro	A & D srl	Supermarket/hypermarket	200 g	2.2
Vitalnature pane azzimo bio	Vitalnature SpA	Supermarket/hypermarket	200 g	2.3
Organic Breakfast Cereals				
Baule Volante Mix 5 cereali precotti Bioritmi	Baule Volante Srl	Internet retailing	450 g	3.8
Cerealvit Bio corn flakes	Cerealvit srl	Supermarket/hypermarket	375 g	1.9
Coop Muesli croccante biologico	Coop Italia	Supermarket/hypermarket	375 g	2.2
Coop bastoncini di crusca bio	Coop	Supermarket/hypermarket	375 g	1.8
Esselunga Bio Fiocchi di frumento integrali	esselunga spa	Internet retailing	375 g	2.1
Organic Cakes				
Baule Volante Minicake	Baule Volante Srl	Internet retailing	45 g	0.7
Esselunga Bio 6 tortini da agricoltura biologica	Esselunga	Internet retailing	240 g	1.8
Germinal Cuor di Mirtillo fourres	Germinal Italia srl	Supermarket/hypermarket	6 x 35 g	3.1
La finestra sul cielo tortine	La finestra sul cielo SpA	Independent small grocers	48 g	1.5
Spighe & Spighe crostata ciliegia	KI Group SpA	Independent small grocers	350 g	4.9
Organic Chocolate Confectionery				
Baule Volante Barretta Gianduia	Baule Volante Srl	Internet retailing	40 g	1.0
Organic Sugar Confectionery				
Baule Volante Caramella Liquirizia	Baule Volante Srl	Internet retailing	70 g	1.9
Baule Volante Caramelle alla menta	Baule Volante Srl	Internet retailing	70 g	2.1
Organic Soy-Based Chilled and Shelf-Stable Desserts				
Naturattiva Budino	Valsoia SpA	Internet retailing	2 x 115 g	
Organic Cheese				
Coop mozzarella da agricoltura biologica	Coop Italia SCARL	Supermarket/hypermarket	125 g	1.2
Entremont Emmental	Entremont Fromager	Supermarket/hypermarket	150 g	3.8
Vivi Verde ricotta	Coop Italia SCARL	Supermarket/hypermarket	250 g	1.4
Organic Cream				
Esselunga Bio Panna da cucina a lunga conservazione da agricoltura biologica	Private Labels	Internet retailing	200 ml	0.9
Organic Reduced Fat Milk				
Fattoria Scaldasole	Fattoria Scaldasole Srl	Supermarket/hypermarket	1000 ml	1.9
Granarolo Prima Natura Bio	Granarolo SpA	Supermarket/hypermarket	1000 ml	1.8
Organic Standard Milk				
Coop Biologico	Coop Italia SCARL	Supermarket/hypermarket	1000 g	1.2
Coop Vivi Verde	Coop Italia SCARL	Supermarket/hypermarket	1000 ml	1.2
Despar latte intero Più Bio	Despar Italia CARL	Supermarket/hypermarket	1000 ml	1.3
Esselunga Bio Latte fresco intero pastorizzato omogeneizzato da agricoltura biologica	Esselunga SpA - Supermercati Italiani	Supermarket/hypermarket	1000 ml	1.4
Fattoria Scaldasole Latte biologico	Fattoria Scaldasole SrL	Supermarket/hypermarket	1000 ml	1.9
Organic Soy Milk				
Biotrend latte di soia	Lidl Italia srl	Discounter	1000 ml	1.0
Cereal soya drink	Nutrition & Santè	Supermarket/hypermarket	500 ml	1.1
Provamel	Vandemoortele International NV	Supermarket/hypermarket	500 ml	1.5
SoloSoia	Alce Nero Cooperativa Agrobiologica A RL	Independent small grocers	500 ml	1.3
Organic Soy-Based Yogurt				
Coop Vivi Verde yogurt bianco naturale	Coop Italia SCARL	Supermarket/hypermarket	2 x 125 g	0.9
Sì Naturalmente bianco Bio	Billa	Supermarket/hypermarket	150 g	0.5

► PRICING SAMPLES (continued)



Brands	Company name	Outlets	Pack size	Price (EUR)
Other Organic Yogurt				
Fattoria Scaldasole	Fattoria Scaldasole SrL	Supermarket/hypermarket	500 g	2.5
Prima Natura Bio	Granarolo SpA	Supermarket/hypermarket	150 g	1.9
Prima Natura Bio	Granarolo SpA	Supermarket/hypermarket	2 x 150 g	1.9
Sì Naturalmente yogurt alla vaniglia bio	Billa	Supermarket/hypermarket	150 g	0.7
Organic Butter				
Sterzing - Vipiteno Bio Butter	Latteria Sociale Vipiteno Scarl	Supermarket/hypermarket	250 g	2.6
Organic Olive Oil				
Bios Monini	Monini SpA	Supermarket/hypermarket	750 ml	7.0
Farchioni Biologico	Farchioni Olii SpA	Supermarket/hypermarket	1000 ml	6.9
Hoc Carapelli	Carapelli Firenze SpA	Supermarket/hypermarket	1 litres	7.0
Venturi Bio	Flli Venturi srl	Supermarket/hypermarket	750 ml	4.5
Organic Vegetable and Seed Oil				
BiOlio di semi di girasole	Organic Oils SpA	Supermarket/hypermarket	1000 ml	3.1
Coop Vivi Verde olio di semi di girasole	Coop Italia SCARL	Supermarket/hypermarket	750 ml	3.0
Crudigno Olio di Girasole	Organic Oils SpA	Independent small grocers	750 ml	3.8
Organic Ready Meals				
Baule Volante Minestrone	Baule Volante SrL	Internet retailing	550 g	6.2
Bio Appeti Lasagne	EcorNaturaSì SpA	Internet retailing	200 ml	3.0
Ecor Burgher Vegetale	EcorNaturaSì SpA	Independent small grocers	200 ml	2.9
Sì Naturalmente carote julienne	Billa	Supermarket/hypermarket	180 g	1.2
Organic Rice				
Baule Volante riso tondo integrale	Baule Volante Srl	Independent small grocers	1000 g	2.8
Baule Volante riso tondo integrale	Baule Volante Srl	Internet retailing	1000 g	2.8
Esselunga Bio riso superfino Arborio da agricoltura biologica	Esselunga Spa	Internet retailing	1000 g	2.6
La finestra sul cielo riso basmati	La finestra sul cielo SpA	Internet retailing	500 g	4.8
RISO RIBE COOP BIOLOGICO	Coop Italia	Supermarket/hypermarket	500 g	1.5
Organic Sauces, Dressings and Condiments				
Aceto balsamico di Modena Monari Federzoni	Monari Federzoni SpA	Supermarket/hypermarket	250 ml	4.0
Aceto bianco Despar	Despar Italia	Supermarket/hypermarket	500 ml	0.8
Aceto bianco Ponti	Ponti SpA	Supermarket/hypermarket	1000 ml	0.9
Aceto di mele Ponti	Ponti SpA	Supermarket/hypermarket	500 ml	1.2
Alce Nero brodo vegetale	Alce Nero Cooperativa Agrobiologica A RL	Independent small grocers	88 g	1.7
Other Organic Snack Bars				
Il Sarchio snack ai semi di zucca bio	Il Sarchio SpA	Supermarket/hypermarket	3 x 20 g	3.0
Il Sarchio snack al sesamo bio	Il Sarchio SpA	Supermarket/hypermarket	6 x 20 g	3.3
Snack barretta con kamut e nocciole	Il Sarchio SpA	Supermarket/hypermarket	3 x 20 g	3.0
Organic Soup				
Sì Naturalmente Minestrone 13 verdure	Billa	Supermarket/hypermarket	450 g	1.5
Organic Honey				
Coop Biologici miele fiori di acacia	Coop Italia	Supermarket/hypermarket	400 g	4.6
Despar miele di trifoglio bianco bio	Despar Italia SCARL	Supermarket/hypermarket	400 g	5.0
Mielizia miele bio di acacia	CONAPI	Supermarket/hypermarket	1 kg	8.9
Mielizia miele bio di arancio di Sicilia e Calabria	CONAPI	Supermarket/hypermarket	400 g	4.4
Other Organic Non-Honey Spreads				
Coop confettura di fragole bio	Coop Italia	Supermarket/hypermarket	330 g	2.2
Nocciolata Rigoni crema di cacao e nocciole	Rigoni di Asiago SpA	Supermarket/hypermarket	350 g	3.4
Rigoni Fior di Frutta alle fragole	Rigoni di Asiago SpA	Independent small grocers	340 g	4.9
Rigoni Fiordifrutta alla pesca	Rigoni di Asiago SpA	Independent small grocers	340 g	4.9
Rigoni Fiordifrutta di Albicocca	Rigoni di Asiago SpA	Supermarket/hypermarket	340 g	3.1

► PRICING SAMPLES (continued)



Brands	Company name	Outlets	Pack size	Price (EUR)
Organic Fruit Snacks				
Noberasco Bio albicocche senza nocciolo	Noberasco SpA	Supermarket/hypermarket	250 g	4.6
Noberasco Sole Luna Fichi Secchi	Noberasco SpA	Supermarket/hypermarket	250 g	2.6
Si Naturalmente albicocche secche Bio	Billa	Supermarket/hypermarket	250 g	4.5
Si Naturalmente prugne secche California senza nocciolo	Billa	Supermarket/hypermarket	250 g	4.5
Organic Nuts				
Noberasco Bio noci sgusciate	Noberasco SpA	Supermarket/hypermarket	80 g	2.9
Noberasco Mandorle Bio sgusciate	Noberasco SpA	Supermarket/hypermarket	70 g	2.0
Si Naturalmente noci da agricoltura biologica	Billa	Supermarket/hypermarket	350 g	3.7
Other Organic Sweet and Savoury Snacks				
Cereal gallette di riso integrale	Nutrition & Santè	Supermarket/hypermarket	2 x 130 g	1.7
Fiorentini gallette di mais	Fiorentini Alimentare SpA	Supermarket/hypermarket	150 g	1.0
Fiorentini mini gallette di mais	Fiorentini Alimentare SpA	Supermarket/hypermarket	200 g	2.7
Other Organic Food				
Baronia Anima e Sapore	De Matteis Agroalimentare SpA	Supermarket/hypermarket	500 g	1.0
Baronia Anima e Sapore Spaghetti da agricoltura biologica	De Matteis Agroalimentare SpA	Supermarket/hypermarket	500 g	1.9
Bio Trend Farfalle	Lidl Stiftung GmbH & Co KG	Discounter	500 g	0.8
Coop Vivi Verde pomodori pelati Bio	Coop Italia SCARL	Supermarket/hypermarket	400 g	0.6
De Cecco pasta di grano kamut bio	De Cecco SpA	Supermarket/hypermarket	500 g	2.9

Source: Euromonitor, 2012.



► FOR MORE INFORMATION

For more information on organic products and labelling standards, please consult the following publications from Agriculture and Agri-Food Canada, or any of the resources listed below:

- ▶ Market Trends: Organics
November 2010
- ▶ Food Labels in Europe: Changes to E.U. Labelling Regulations and New Eco-Labels in France
September 2010
- ▶ *Special Edition* Market Briefing: Food Information and Labelling in the European Union
September 2011

Key Resources on Organic Standards, Regulations, and Labelling

Italy	Country Reports: Organic—Europe http://www.organic-europe.net/country_reports/italy/default.asp#certifying_bodies
European Union	*The regulations surrounding food labelling in the E.U. are currently under review, and may be subject to further amendments. For more detailed information, or the latest updates, please consult the following resources: The European Commission http://ec.europa.eu/food/food/labellingnutrition/nutritionlabel/index_en.htm The European Food Information Council http://www.eufic.org/article/en/health-and-lifestyle/food-choice/artid/Nutrition-labelling-how-where-and-why/
Canada	Canadian Food Inspection Agency, Organic Product Regulations http://www.inspection.gc.ca/english/fssa/orgbio/orgbioe.shtml
International	International Taskforce on Harmonization and Equivalence in Organic Agriculture http://www.itf-organic.org/ International Federation of Organic Agriculture Movements http://www.ifoam.org/about_ifoam/standards/index.html

The Government of Canada has prepared this report based on primary and secondary sources of information. Although every effort has been made to ensure that the information is accurate, Agriculture and Agri-Food Canada assumes no liability for any actions taken based on the information contained herein.

Organic Packaged Food in Italy

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