

THE ITALIAN ORGANIC AGRI-FOOD

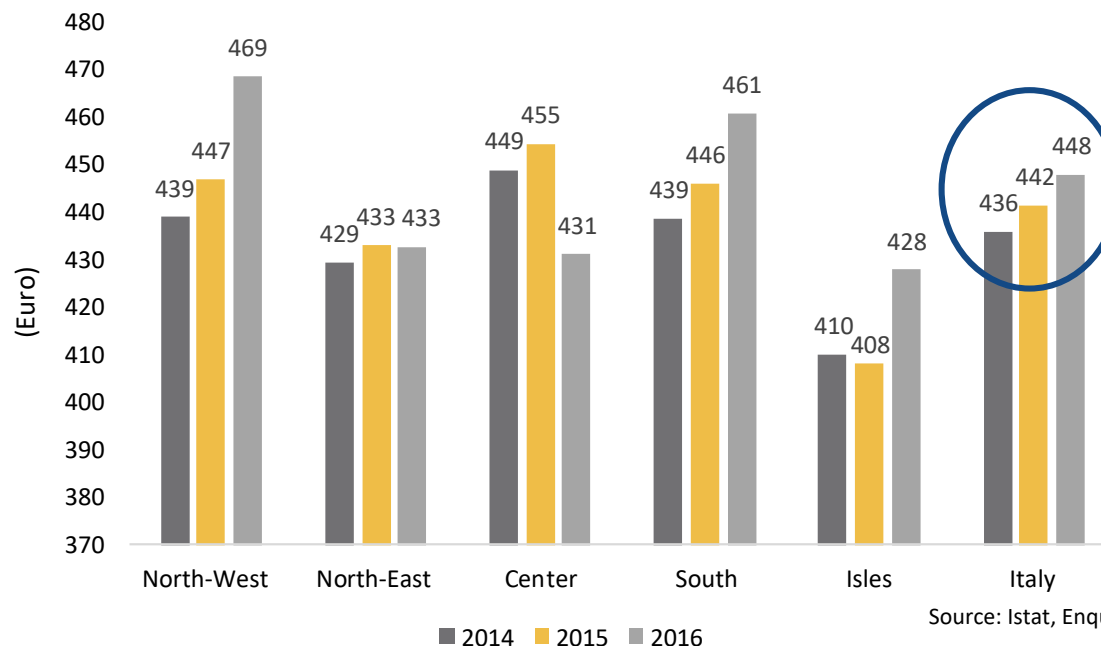
A FOCUS ON THE ORGANIC CONSUMPTION
IN THE NATIONAL MARKET

Confagricoltura, October 25th 2017

HOW MUCH DO WE PAY FOR FOOD?



MONTHLY AVERAGE COST FOR FOOD AND BEVERAGE BY GEOGRAPHICAL DISTRIBUTION
YEAR 2014-2016 (EURO)



- 2.525 € is the monthly average cost of the Italian families in 2016, revealing for the third straight year a slight increase;
- 448 € (+1,5% compared to 2015) is the monthly average cost for food and non-alcoholic beverages;
- increase in the North-West +4,8%, South + 3,3% and Islands +4,9%, decrease in the Center stability in the North-East.



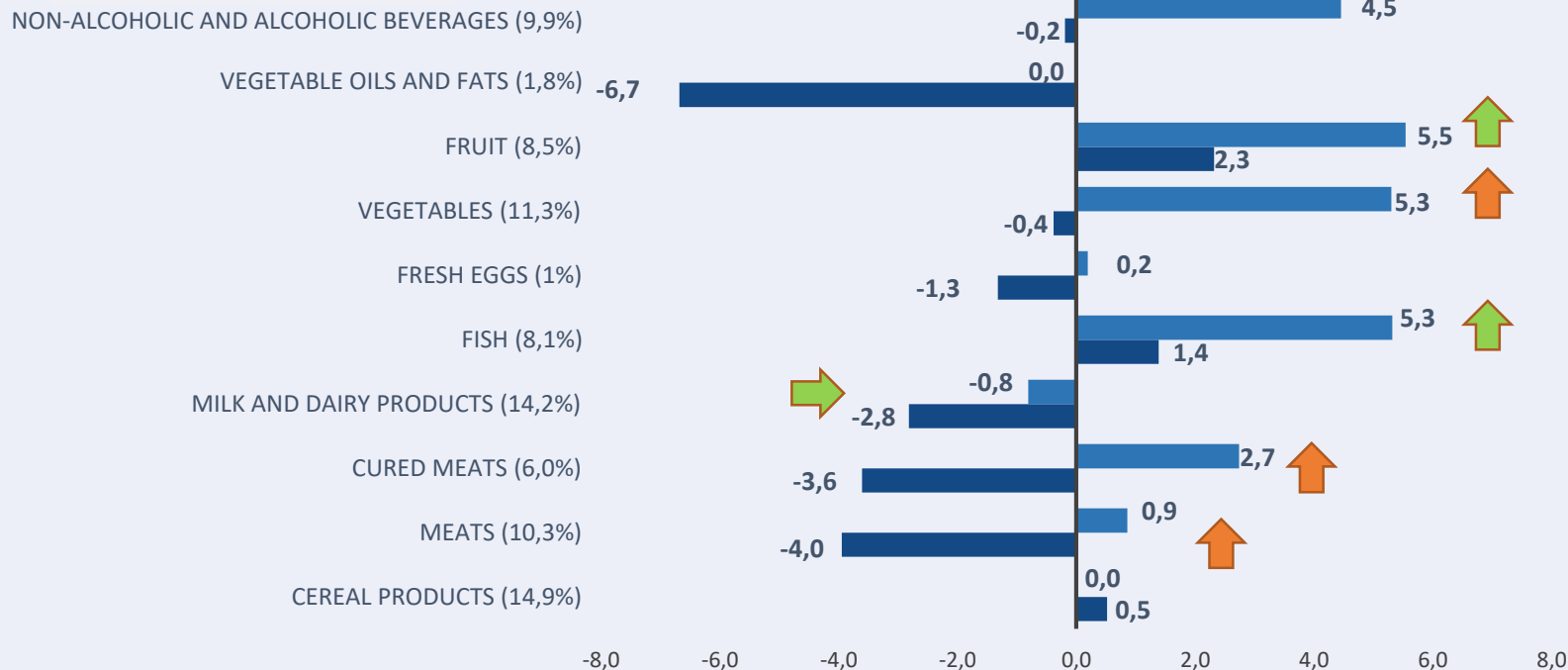
AGRI-FOOD CONSUMPTIONS IN THE 1ST SEMESTER 2017



Purchasing dynamic for agri-food

■ 1ST SEMESTER 2017 vs 2016

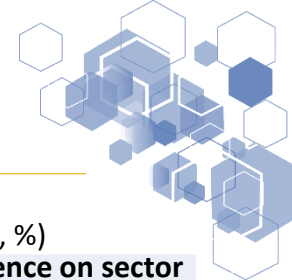
■ 2016 vs 2015



In the 1ST semester of 2017

- the appeal of fruits and vegetables keeps increasing
- positive reversal in the meats and cured meats' consumption trend
- the consumption of milk and dairy products keeps decreasing

HOW MUCH IS THE ORGANIC SECTOR WORTH?



INCIDENCE OF THE ORGANIC CONSUMPTION EXPENDITURE ON THE AGRI-FOOD PER SECTOR (JAN-JUN 2017, %)

| Organic and Sectors | Value (Mgl di €) | Incidence on sector (Tot. agro-food) |
|---------------------------|------------------|---|
| U | 1.026.987 | 2,8 |
| CEREAL PRODUCTS | 169.485 | 3,2 |
| MEATS | 6.965 | 0,2 |
| CURED MEATS | 3.116 | 0,1 |
| MILK AND DAIRY PRODUCTS | 68.761 | 1,4 |
| FISH | 5.805 | 0,2 |
| EGGS | 45.120 | 12,9 |
| VEGETABLES | 223.392 | 5,6 |
| FRUIT | 257.131 | 7,8 |
| VEGETABLE OILS AND FATS | 19.787 | 3,0 |
| HONEY | 8.931 | 12,9 |
| WINE AND SPARKLING WINES | 7.798 | 0,7 |
| BEER | 921 | 0,1 |
| OTHER ALCOHOLIC BEVERAGES | 27 | 0,0... |
| NON ALCOHOLIC BEVERAGES | 34.854 | 4,2 |
| OTHER FOOD | 104.274 | 2,2 |

Source: Ismea-Nielsen

In the first semester of 2017 the expenditure for organic food and beverage represents around 3% of the total agri-food expenditure, but the incidence of the organic sector is particularly remarkable



THE "BIO" PERFORMANCES

CONSUMPTIONS TREND FROM 2003 TO 2017 (1ST SEMESTER)

Annual % variation of the organic consumption in the large-scale distribution for packaged products
and comparison with the agri-food sector



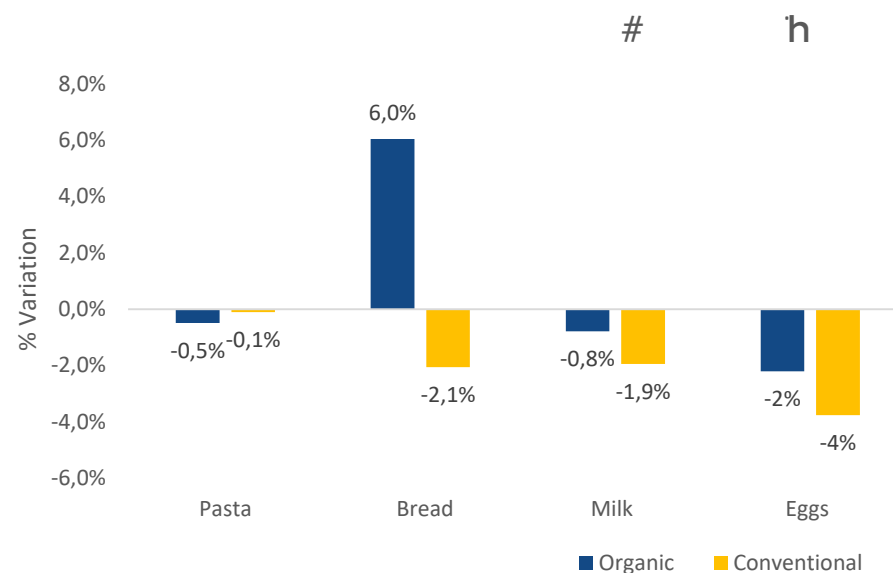
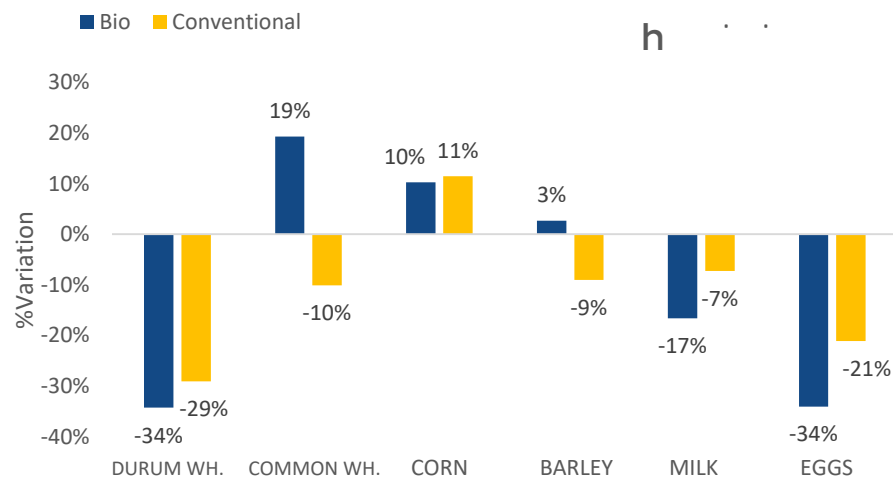
*Increased value of the consumption in the large-scale distribution compared to the 1st semester of 2016

Source: Panel Retail Ismea-Nielsen-GfK Eurisko

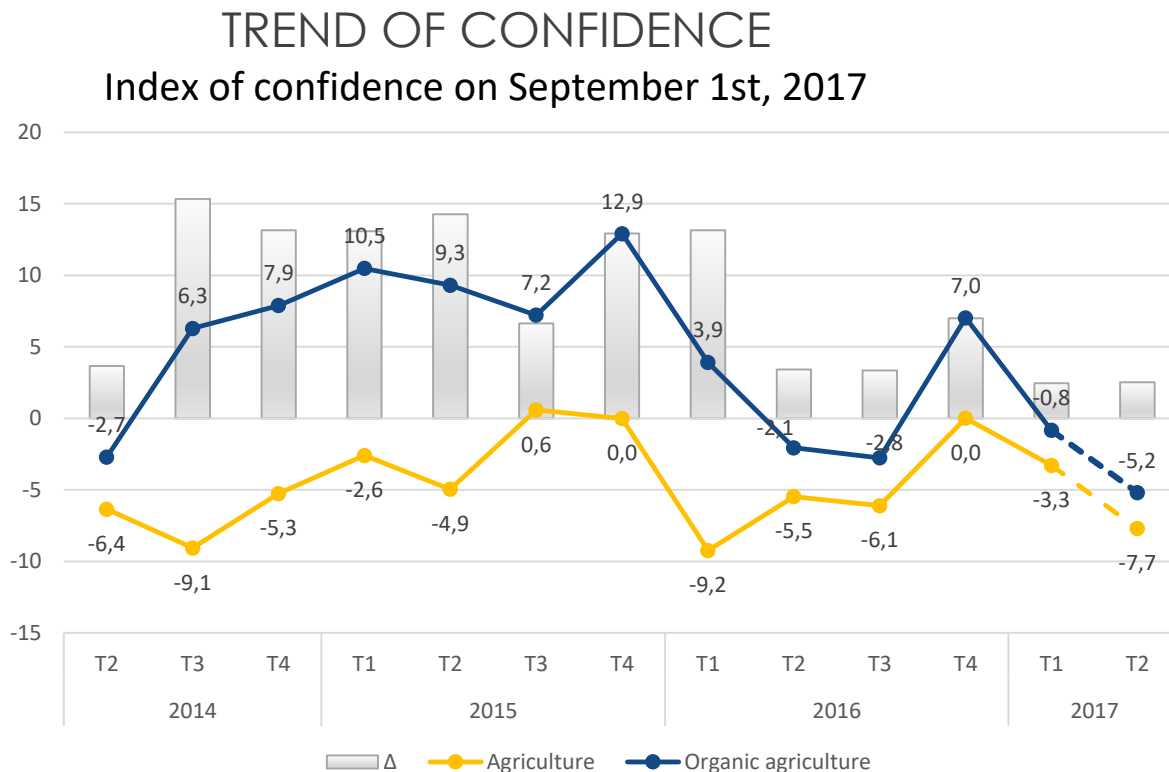
PRICES OF THE ORGANIC PRODUCTS



ADDED VALUE OF THE PRICE (VAR. %2016-2015)



CONFIDENCE OF THE AGRICULTURAL COMPANIES



Other compartments include: Meat, Fish, Honey, Cured meat, Beer, Wine and Sparkling wine, other alcoholic beverages

Source: Panel-smea Elaborations

- The negative value of the confidence index is to be addressed mostly to the volatility of the prices at the source that make the interviewed companies pessimistic concerning the stability of the incomes in the long term
- The index of the first semester of 2017 takes into account the unfavourable weather conditions that raged all over Italy





THANKS FOR YOUR ATTENTION

ISMEA

VIALE LIEGI, 26
00198 - ROMA
TEL. (+39) 06. 85568576

A.GIULIANO@ISMEA.IT