



# **THE ORGANIC PRODUCT MARKET: CONSUMPTION AND SALES CHANNELS**

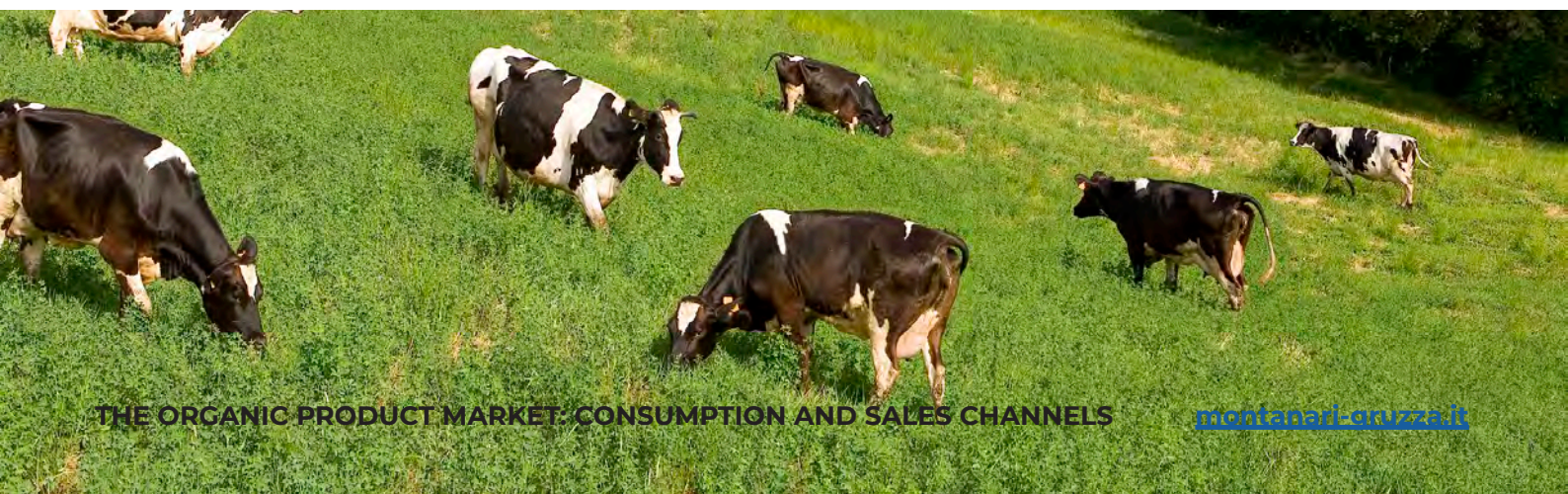
# THE MARKET IN NUMBERS

According to Nomisma data, in 2023, Italian organic farming continues to grow, with increases in agricultural land, operators, exports, and internal market performance. This growth is driven by a significant rise in out-of-home consumption (restaurant and collective catering up 18% compared to 2022) and a 7% increase in domestic consumption as of July 2023.

Italy, with over 2.3 million hectares and 19% of its agricultural land dedicated to organic farming (compared to the European average of 12%), is close to meeting the EU's Farm to Fork Strategy goal of 25% by 2030.

In 2022, organic food sales in Italy surpassed 5 billion euros. Out-of-home consumption reached nearly 1.3 billion euros, driven more by price increases than by consumption frequency. Domestic consumption also rebounded by 7%, largely due to inflation, despite a decline in volume in major distribution channels.

Modern distribution remains the primary channel for organic purchases, accounting for 58% of domestic sales, with sales exceeding 2 billion euros in 2023. Hypermarkets and supermarkets lead, with over 1.5 billion euros in sales, followed by discount stores and self-service outlets.







# A GLIMPSE INTO THE PAST

Over the past two decades, the organic food product market saw very substantial growth.

Sales of organic food worldwide went from near zero, figures recorded in the early 1990s, to exceeding the threshold of \$100 billion in 2018.

(Ecovia Intelligence, 2019)

The global organic food market is currently worth over US\$ 134 billion

(Statista, 2022)





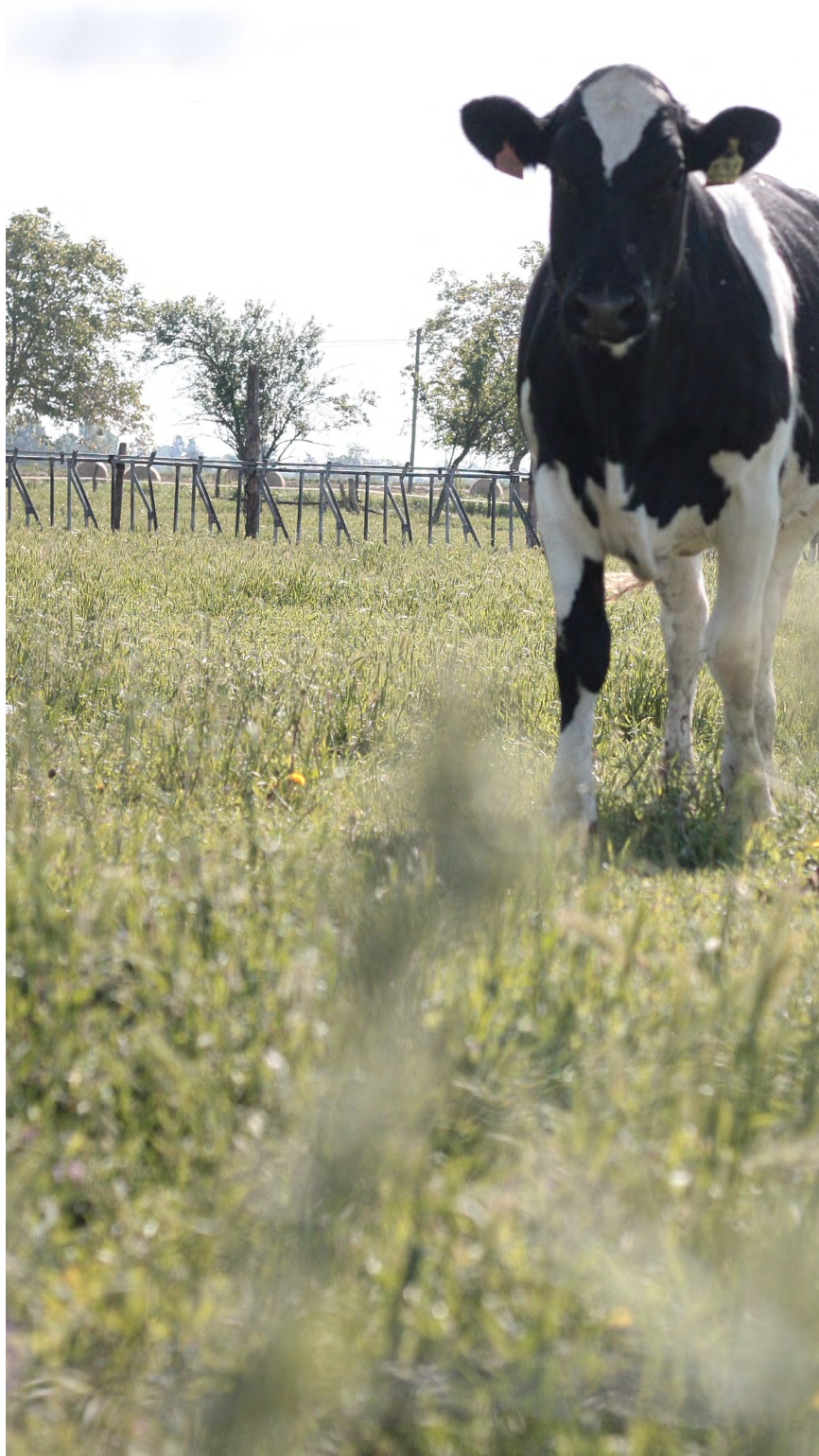
# THE ORGANIC MARKET AROUND THE WORLD

The global organic market is dominated by the United States, which accounts for almost half of the total value on its own (€56.6 billion – 45.5% of the total).

It is followed by Germany (€15.3 billion) and China (€12.4 billion) which surpassed France in 2022 (IFOAM 2024).

Europe is the geographical region where consumers show the greatest willingness to pay for organic products. In particular, high expenditure is recorded in Switzerland (+8.3% compared with 2017), in Denmark (+12.2%) and Sweden (-2.5%).

Denmark also continues to have the highest share of the organic market at 12% of the total food market (IFOAM 2024).





# THE ORGANIC FOOD MARKET IN ITALY IN 2023

Italian families' purchases of organic products exceeded €5.47 million in 2023, with a 9% growth compared to the previous year.

Organic is the **consumer's first choice** when buying (in order of importance):

- fresh fruit and vegetables;
- eggs;
- extra-vergin olive oil;
- jams;
- meat;
- milk;
- cheeses (5%).

Consumers **reasons to buy organic food** are (in order of importance):

- "they are safer for my hearth" (27%)
- "they are more environmental friendly" (23%)
- "they are more respectful of animal welfare" (10%)
- "they are guarantee of quality" (10%)

Source: Nomisma per Osservatorio SANA 2023

# ORGANIC ITALIAN EXPORT

Organic Italian export is also playing an important role for the industry.

In 2023, the export of Italian organic products reached €3,641 millions, marking a significant +203% variation on the period 2012-2023, and a growth of 8% Year on Year, compared to 2022.



Source: Osservatorio SANA-Nomisma

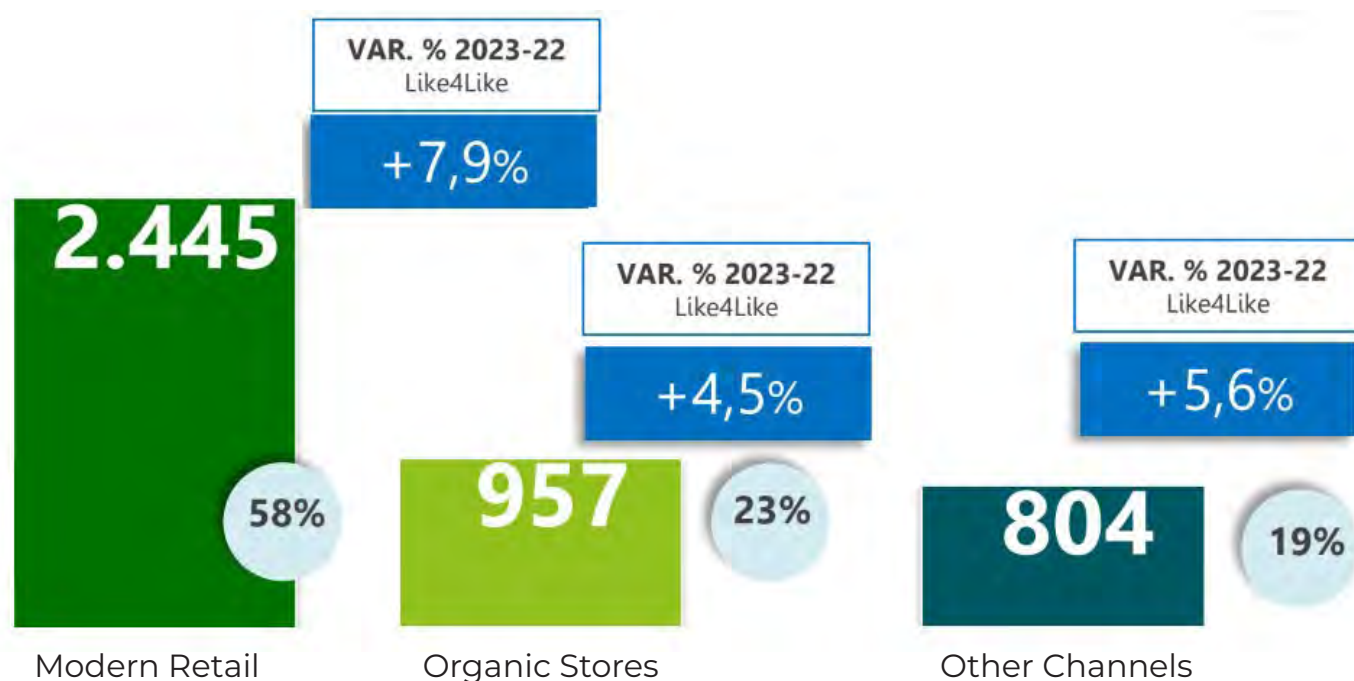


# ITALIAN ORGANIC CONSUMPTION

77% of Italian organic products are consumed at home, marking a +7% growth compared to 2022, reaching €4.207 millions of total sales.

The 58% (+7,9 YoY) of these products in reaching Italian houses through modern retail (hyper and supermarkets, free service, discount shops, drug specialists).

Organic specific stores weight a 23% (+4,5 YoY) and other channels such as neighborhood shops, etc at 19% (+5,6% YoY).



Source: Osservatorio SANA-Nomisma

# MODERN RETAIL IN ITALY

Modern retail, with supermarkets and hypermarkets, remains the preferred retail channel by organic consumers with an increase of +5% compared to 2022.

Inspecting the variation of volume minus the number of packages, the growth might not be consistent as it may seems.



Source: Osservatorio SANA-Nomisma





# FAD OR AN INFORMED DECISION?

Organic food is definitely not a passing fad: in fact, 54% of Italian families eat organic food and drink at least once a week and for 50% of those responsible for buying food, organic products are the first choice in the basket, especially when it comes to fresh fruit and vegetables (26%), eggs (17%) and breakfast products (13%).

Their purchasing reasons include the guarantee of quality and health benefits (64%), curiosity (57%) and respect for the environment (42%).

Various factors affect interest in organic products and help us identify the profile of organic frequent users (54% out of the total population): firstly, there are income and level of education (the percentage of regular consumers of organic products is higher when buyers have a medium-high monthly income and level of education), followed by the make-up of the household.

In fact, when they have children – particularly under 12 years old –, the percentage of regular users increases up to 62%. Last but not least, there are eating habits: in families with vegetarians or vegans, the rate of organic frequent users rises to 76%.

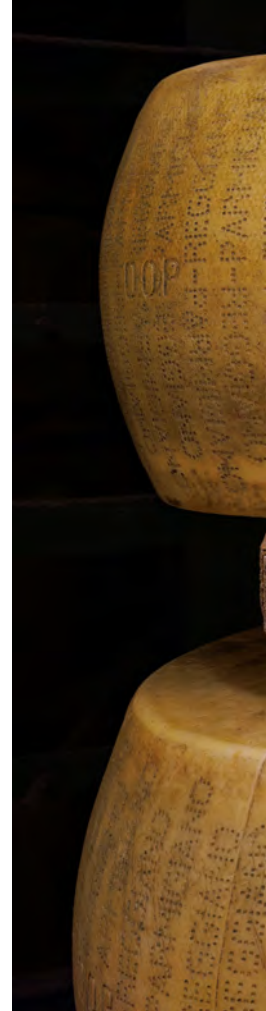




# THERE IS ORGANIC AND ORGANIC. HOW DO MODERN CONSUMERS CHOOSE THEIR ORGANIC PRODUCTS?

Source stands out among purchasing criteria: 57% of people say they buy an organic product if the ingredients are Italian, while 37% will if it is locally sourced or zero-mile.

For 69% of consumers, the packaging of organic products perfectly incorporates and conveys the values of organic food. More specifically, the pack must be sustainable: 100% recyclable for 28% of consumers and fully compostable for another 10%. It is also important that the packaging is made with recycled materials (11%), recycled cardboard (4%) or recycled plastic (3%).







# A GLIMPSE INTO THE FUTURE

There is still plenty of room for growth in demand on the Italian market: annual per capita consumption is €60, while in France and Germany, this figure was respectively €174 and €144 in 2019 (Source: FiBL).

According to consumers, the most important values for organic food products are product traceability (for 25%), health benefits (24%) and the safety guarantees offered by the certification (23%). These will be the plus points to communicate more forcefully in the near future.



# IN MILK WE TRUST SINCE 1950



Montanari&Gruzza is a family company founded in 1950 in Reggio Emilia: a region where major traditional Italian culinary products were created with patience, passion and hard work.



# OUR PRODUCTS



**Butter:** premium line, traditional, organic and specialities with particular characteristics.

**Cheeses:** Standard and organic PDO Parmigiano Reggiano and PDO Grana Padano, special products from native breeds and with long ageing.





# WHY CHOOSE US



- Wide, diversified range of products
- Recognised quality on the market by 1,000 international organisations
- Tradition and experience: we have been on the market since 1950
- Service and Logistics: we listen and respond to our customers' requests
- Region: we have an unbreakable bond with the region where we work



# THE SUPPLY CHAIN

01

## Region

We believe in the region's value, its natural biodiversity and its history.

02

## Farming

We have invested in typical regional dairy cattle breeds, such as Reggiana Red Cows and Alpine Brown Cows, over Modenese White Cows.

03

## Cheese Factories

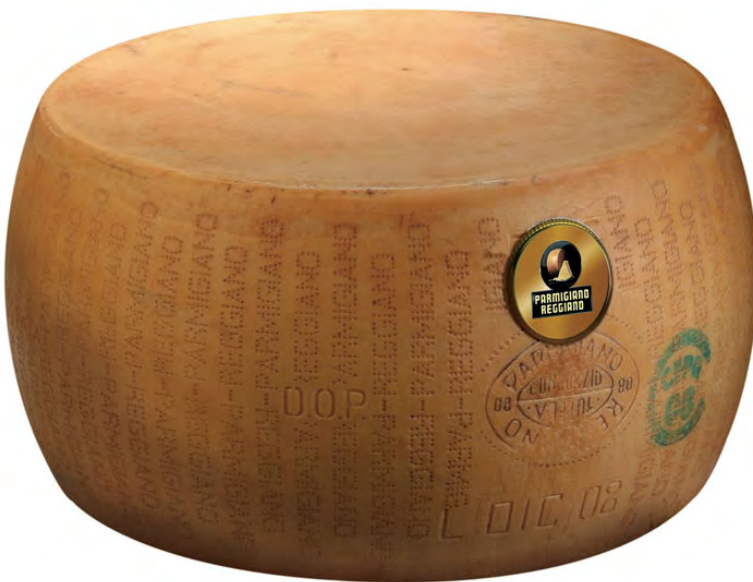
Parmigiano Reggiano's extremely complex production process showcases the expertise of our cheesemakers, who receive the milk to be processed each day.

04

## Distribution

Our customer service includes careful and precise management of the value chain, as well as the prompt and widespread distribution of our products.

# 24-MONTH ORGANIC PARMIGIANO REGGIANO WHOLE CHEESE



The smell of fresh milk and the aromas of fresh grass, protected in a WHOLE CHEESE with 24 months of aged goodness, which releases unbeatable aromas and flavours when cut.

All the tradition and expertise of master cheesemakers straight to you: the best form of natural goodness, completely intact.

Parmigiano Reggiano is an important source of energy and a complete food perfect for everyone because it is rich in calcium, phosphorous, trace elements and vitamins, while also being very easy to digest.

Its cholesterol content is among the absolute lowest of all cheeses and it is naturally lactose-free.

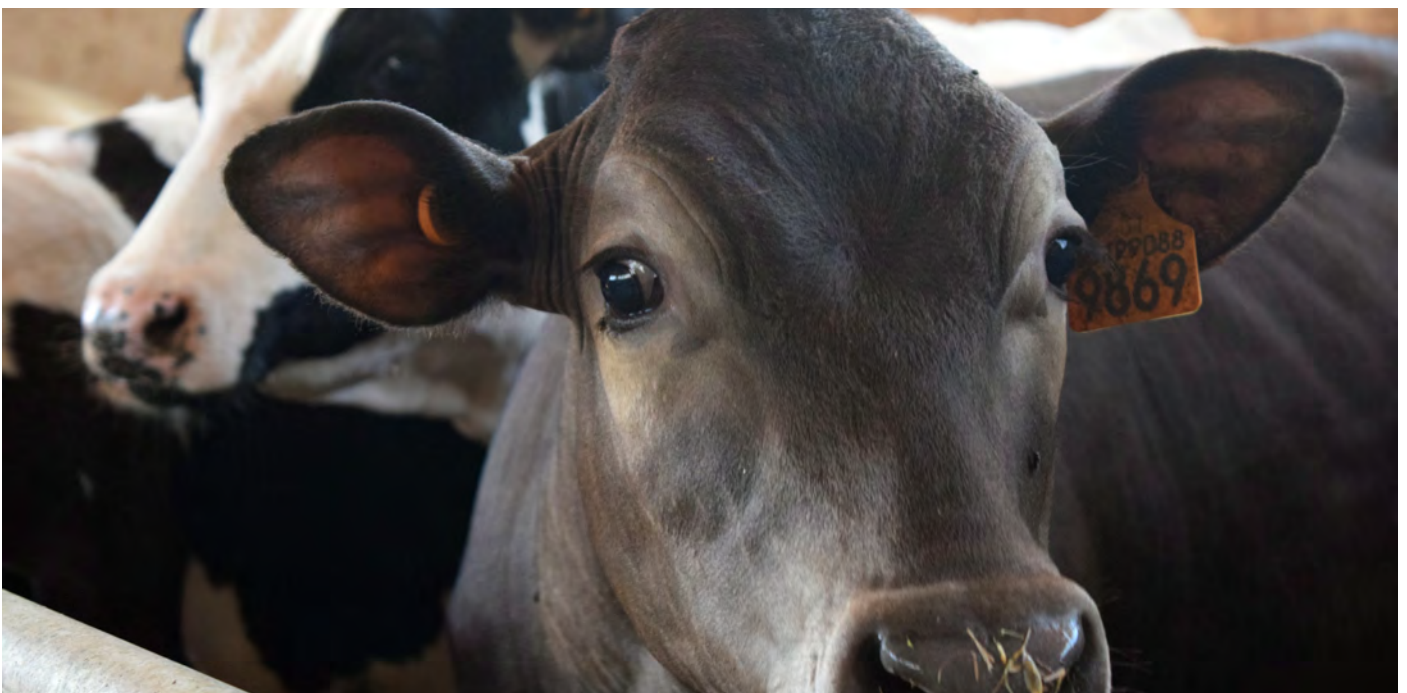
It is recommended as a food for children. It is also particularly suitable for people who play competitive or amateur sport and is great for the elderly. This cheese is even better because it is organic!



# 24-MONTH ORGANIC PARMIGIANO REGGIANO VACUUM-PACKED 2KG BLOCK

Goodness and convenience in a handy 2kg format designed for cutting at the service counter and for reducing any waste by cutting the fresh product in front of the customer.

The smell, texture, colour and unique aroma of our medium-aged Organic Parmigiano Reggiano (24 months) to satisfy all palates.





# 24-MONTH ORGANIC PARMIGIANO REGGIANO VACUUM-PACKED 200G WEDGE



From the cheese factory to your table, so much goodness and healthiness for any time of day. Our Organic Parmigiano Reggiano is aged for 24 months, because after this long, patient rest, it reaches the perfect level of maturity to express its most typical characteristics.

The 200g pack is perfect for anyone who wants to use the product either on its own or grated: a handy format, vacuum-packed to preserve all the nutritional properties and flavours at their best, even when refrigerated at home.

In October 2019, our 200g organic Parmigiano Reggiano received the "GUT" mention from the "Ökotest" magazine.





# 24-MONTH ORGANIC PARMIGIANO REGGIANO

## 50G FRESHLY GRATED

This organic Parmigiano Reggiano, aged for 24 months or more, is grated as soon as it is cut and packaged in a protective atmosphere to keep its intense, fragrant taste.

The texture is soft and incredibly light, just like when freshly grated.

The handy 50g pack is perfect for always having it ready and fresh with no waste.





# 24-MONTH ORGANIC PARMIGIANO REGGIANO

## 40G FLAKES



Small, fragrant flakes of Organic Parmigiano Reggiano, aged for 24 months or more, in a handy 40 g pack, packaged in a protective atmosphere to keep the same taste and aromas.

The flakes are small so they can be combined with any dish.

The 40 g pack is perfect for using with no waste.





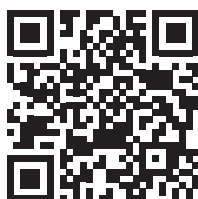
# 24-MONTH ORGANIC PARMIGIANO REGGIANO 200G WEDGE

Our Organic Grana Padano is an authentic product with a unique, unmistakable flavour, created from the ancient dairy tradition of our region. Our Organic Grana Padano is lysozyme-free.

It is made with organic milk from native breed cows, only fed with natural substances without any GMOs and which have not undergone any treatments with herbicides, fertilisers, insecticides or drugs, as required by European Regulation No. 848/2018 (formerly EC 834/2007).

It is a pale yellow cheese with a soft texture and delicate flavour.





*In milk we trust since 1950*

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