



FEDERAZIONE ITALIANA AGRICOLTURA BIOLOGICA E BIODINAMICA

Il mercato biologico globale:
situazione e tendenze



Roberto Pinton

www.federbio.it • info@federbio.it







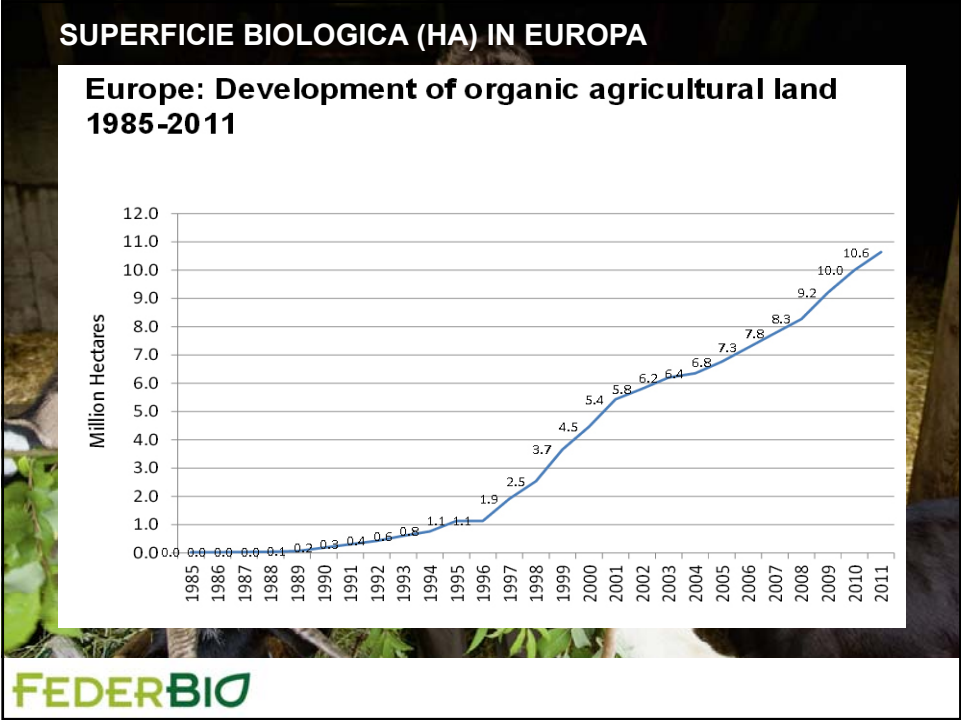
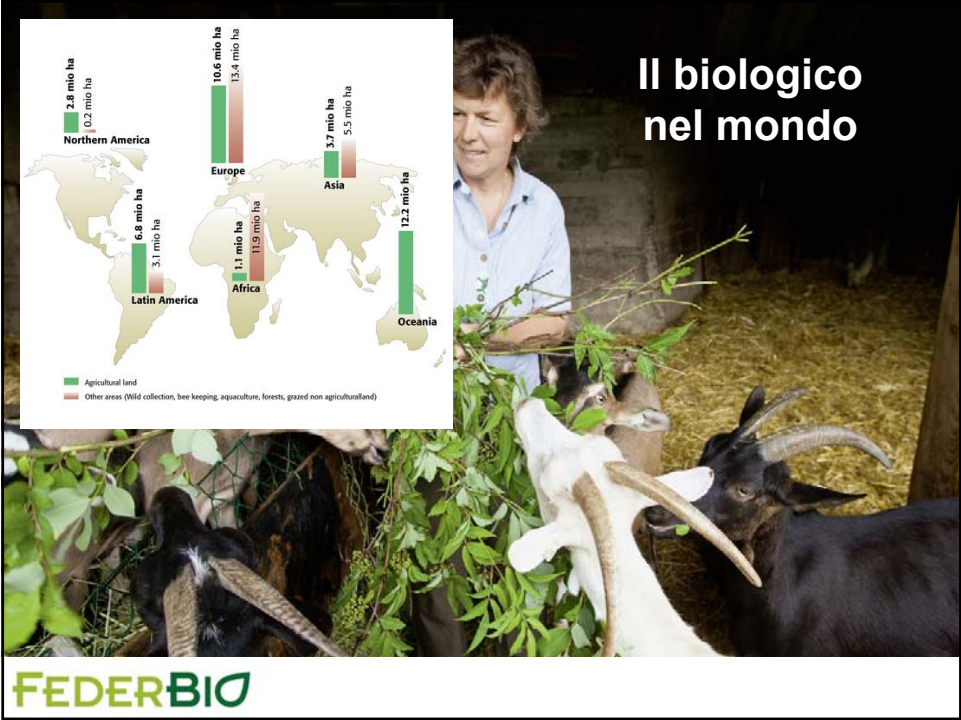
Federazione unitaria interprofessionale

Fondata nel 1992

- 35 associazioni nazionali o regionali di agricoltori biologici**
- 2 associazioni nazionali di tecnici**
- 2 enti fieristici**
- 1 associazione nazionale di produttori di mezzi tecnici**
- 8 organismi nazionali di controllo**
- 1 associazione nazionale dei consumatori**
- 2 associazioni culturali e ambientaliste**
- 3 associazioni nazionali di imprese di trasformazione e distribuzione**
- 1 associazione nazionale di retailer**

56 soci che rappresentano il 95% del settore biologico italiano

FEDERBIO



AGRICOLTURA ITALIANA IN CIFRE

	1990	2001	2010
Number of farms	3 023 344	2 617 790	1 630 420
Var +/-		-13,4%	-32,2% (-46,08% on 1990)

AGRICOLTURA BIOLOGICA ITALIANA IN CIFRE

	1990	2000	2010
Number of farms	4 189	31 118	41 807
Var +/-		+642%	+34,35% (+898% on 1900)

FEDERBIO

**8% della superficie agricola
italiana è biologica**

FEDERBIO

A photograph showing two farmers working in a field. One farmer is bent over, using a hoe to dig the soil, while the other stands nearby, also holding a hoe. The background shows a hilly landscape with trees and a clear sky.

**65% degli agricoltori italiani
ha meno di 50 anni**

(solo il 14% nell'agricoltura in genere)

In Italia
43.815 aziende agricole biologiche

FEDERBIO

A photograph showing two men inspecting a field of tomatoes. One man, wearing glasses and a blue checkered shirt, is holding a clipboard and a yellow marker, looking at the tomatoes. The other man, wearing a red shirt, is also looking at the tomatoes. The field is filled with green tomato plants and some ripe red tomatoes.

**L'agricoltura
biologica
è tecnicamente
sostanziosa**

FEDERBIO





Nel 2013 vendite dirette a +12%



FEDERBIO

**3 906 (9,3%)
svolge attività
di trasformazione**



FEDERBIO



I NUMERI 2007/2011

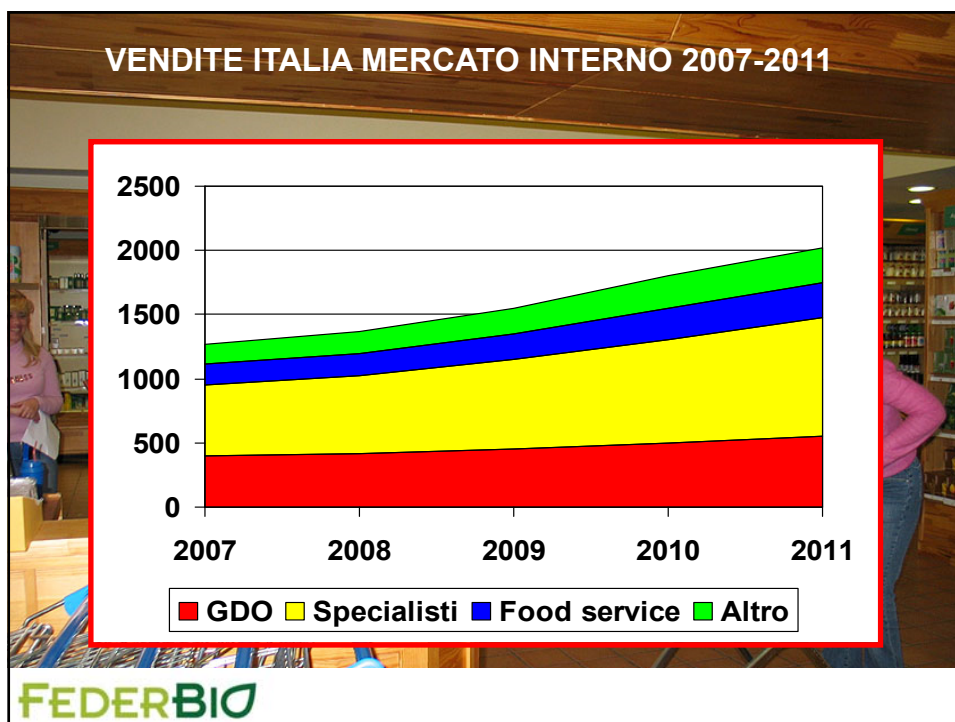
	2007	2008	2009	2010	2011
Superficie biologica (ha)	903.254	812.139	735.327	821.921	837.107
Superficie conversione (ha)	246.999	190.275	371.357	291.821	259.782
Superficie totale	1.150.253	1.002.414	1.106.684	1.113.742	1.096.889
Agricoltori	45.389	44.556	43.230	41.807	41.811
Media ettari per azienda	25,3	22,5	25,6	26,6	26,2
Trasformatori	4.841	5.047	5.223	5.592	6.165
Importatori	46	51	53	44	63
Totale operatori	50.276	49.654	48.509	47.663	48.269
Vendite GDO	400 milioni	420 milioni	450 milioni	500 milioni	545 milioni
Vendite specializzato	550 milioni	600 milioni	700 milioni	800 milioni	895 milioni
Ristorazione	160 milioni	180 milioni	200 milioni	250 milioni	280 milioni
Altre vendite	160 milioni	170 milioni	200 milioni	250 milioni	280 milioni
Totale vendite domestiche	1.270 milioni	1.370 milioni	1.550 milioni	1.800 milioni	2.000 milioni
Export	865 milioni	925 milioni	1.000 milioni	1.050 milioni	1.135 milioni
Vendite totali (mio EUR)	2.135 milioni	2.295 milioni	2.550 milioni	2.850 milioni	3.135 milioni

FEDERBIO

GLI OCCUPATI

Addetti nelle aziende di sola produzione primaria	111.425
<i>Di cui Conduttore</i>	37501
<i>Di cui Familiari</i>	43211
<i>Di cui Altra manodopera</i>	30713
Addetti nelle aziende che fanno anche trasformazione	13.084
<i>Di cui conduttore</i>	3906
<i>Di cui familiari</i>	5380
<i>Di cui Altra manodopera</i>	3798
Preparatori	49.320
Dettaglio specializzato	4.545
Dettaglio semi specializzato (erboristerie ecc.)	2.300
Personale GDO	1.775
Tecnici, consulenti	500
Ispettori	1.200
Addetti ristorazione	7.000
Mezzi tecnici	200
Altro indotto (logistica, servizi)	10.000
Totale	201.349

FEDERBIO

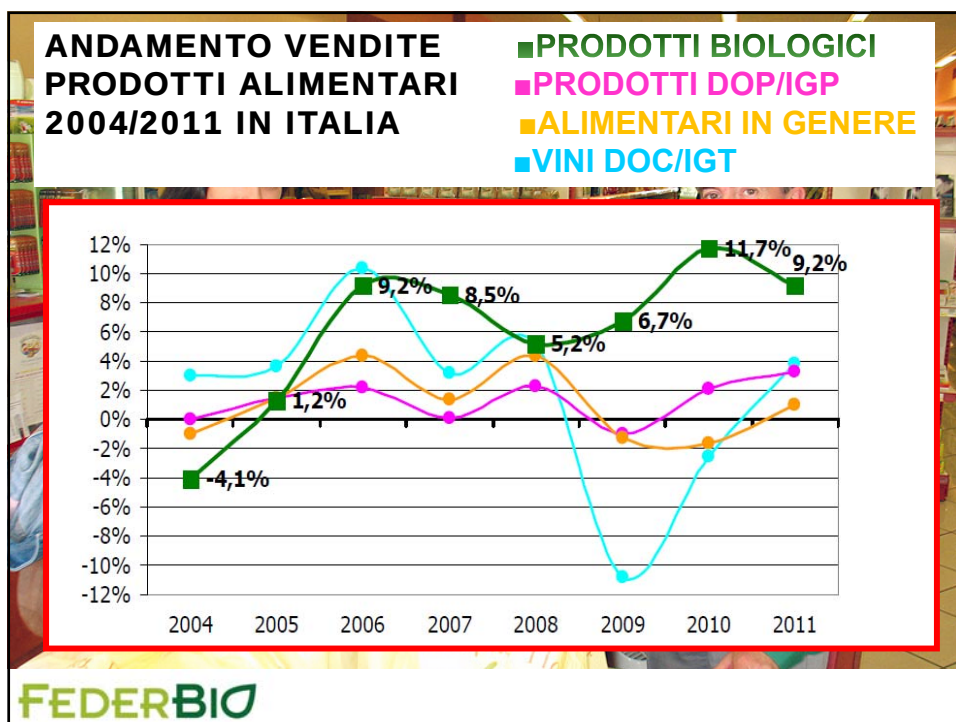
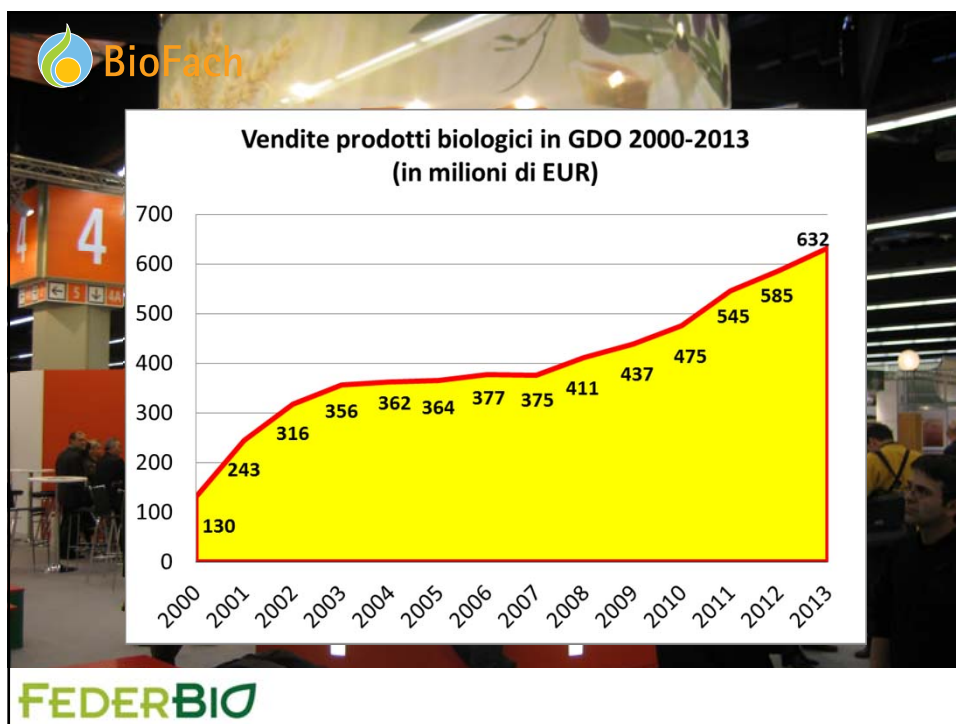


VENDITE IN GDO (Ismea/GFK-Eurisko)

2012 : + 7,3% in valore **2011: + 8,8% in valore**

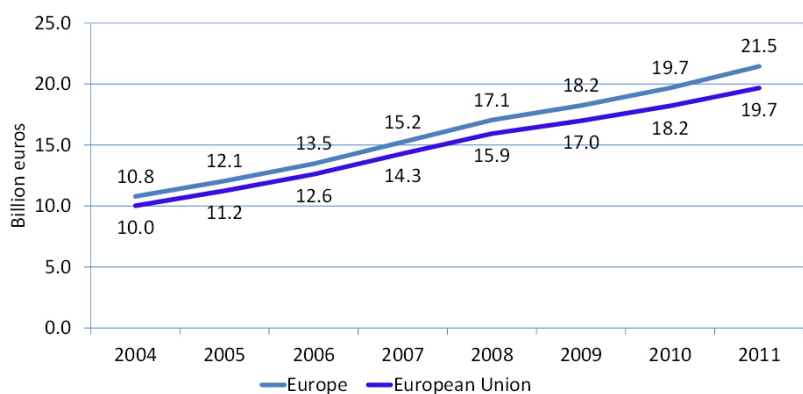
Acquisti domestici in valore di prodotti biologici	Var. % 2011/10	Var. % 2012/11	Peso % sul tot. 2012
Totale bio confezionato	8,8	+ 7,3	100,0
di cui:			
Ortofrutta fresca e trasformata	3,5	+ 7,8	30,5
Lattiero-caseari	16,1	+ 4,5	22,6
Biscotti, dolci e snack	14,4	+ 22,9	9,4
Pasta, riso e sost. del pane	-3,2	+ 8,9	8,3
Bevande analcoliche	10,5	+ 16,5	6,5
Zucchero, caffè, tè	-9,9	+ 0,4	3,2
Carni fresche e trasformate	-14,5	+ 4,8	2,0

FEDERBIO



VENDITE BIO IN EUROPA 2004/2011

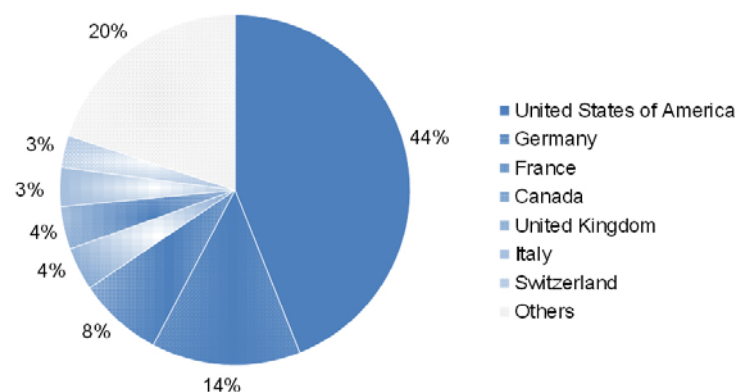
Europe: Growth of the Organic Market 2004-2011



FEDERBIO

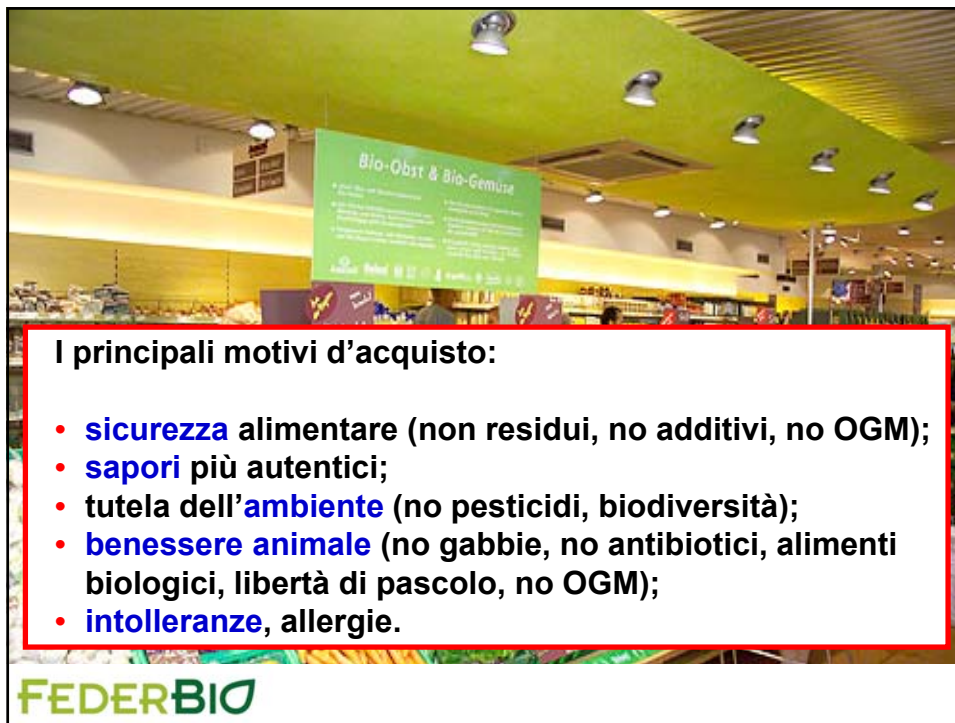
QUOTE SULLE VENDITE BIO, 2011

Distribution of organic sales by country 2011



FEDERBIO





I principali motivi d'acquisto:

- **sicurezza** alimentare (non residui, no additivi, no OGM);
- **sapori** più autentici;
- tutela dell'**ambiente** (no pesticidi, biodiversità);
- **benessere animale** (no gabbie, no antibiotici, alimenti biologici, libertà di pascolo, no OGM);
- **intolleranze**, allergie.

FEDERBIO



1,200
negozi biologici

FEDERBIO







**Il 20 marzo 2013
Carrefour ha aperto
il suo primo negozio
tutto biologico nel
cuore di Parigi, in
boulevard Diderot,
nel 12°
arrondissement ,
170 mq.**

FEDERBIO



**Il mercato biologico svizzero nel 2012 è
cresciuto del 5,3 % a 1,83 miliardi di franchi
(1,47 miliardi EUR).**



FEDERBIO



I prodotti biologici rappresentano il 6,3 % del mercato alimentare svizzero







MIGROS
BIO

Migros nel 2012 si è alleato con Alnatura e ha lanciato un format tutto bio a Zurigo

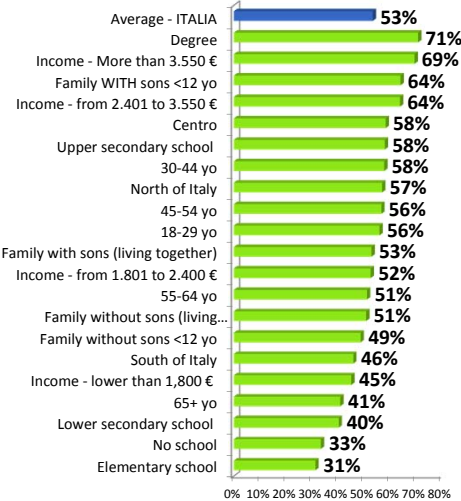
Nature
Joghurt | Yogourt | Yogurt

FEDERBIO

AssoBio



**Penetrazione
dei prodotti
biologici
per target**



FEDERBIO



**OGNI PRODOTTO
ALIMENTARE ITALIANO
È DISPONIBILE
IN VERSIONE BIOLOGICA**

FEDERBIO

5.597 imprese di trasformazione e distribuzione
297 importatori



Ortofrutta (sfusa e confezionata secondo le diverse specifiche del cliente)

FEDERBIO

Vini da tutte le zone vitivinicole d'Italia



All'International Wine Challenge di Londra 2013, il Franciacorta Rosè Docg 2008 Barone Pizzini ha vinto l'Iwc Organic Trophy come **miglior vino biologico al mondo**, ma anche l'Italian Sparkling Trophy, come **miglior spumante italiano in assoluto**

FEDERBIO









Dal 2006 il leader di mercato per confetture e marmellate è un'azienda biologica, con una quota oltre il 20 %

FEDERBIO

Olio extravergine d'oliva e prodotti a base di olive...



FEDERBIO

Ogni tipo di conserva vegetale...



FEDERBIO

Succhi, nettari e bevande vegetali
sostitutive del latte.



FEDERBIO



















FEDERBIO



FEDERBIO



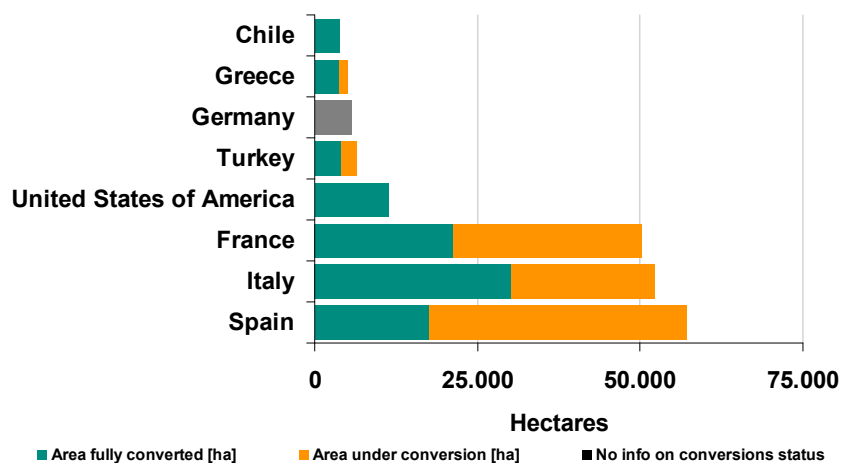






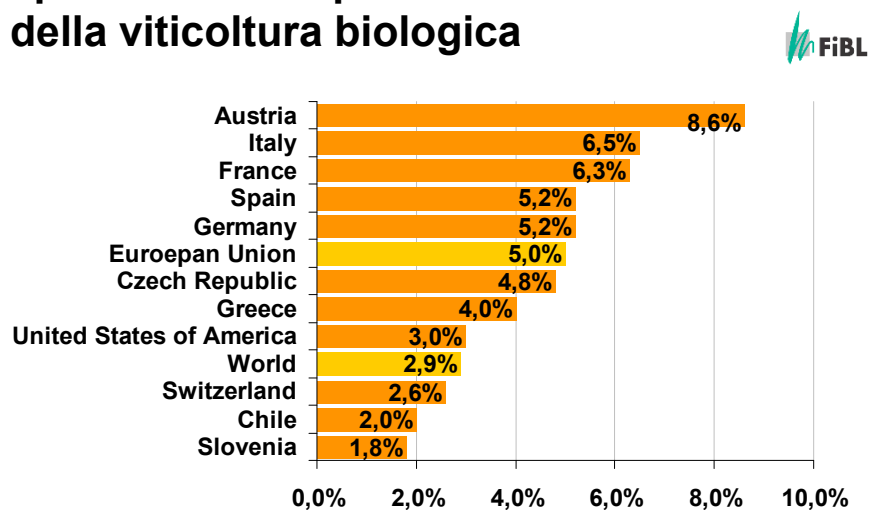


Primi 10 Paesi per area vitata biologica e in conversione 2010



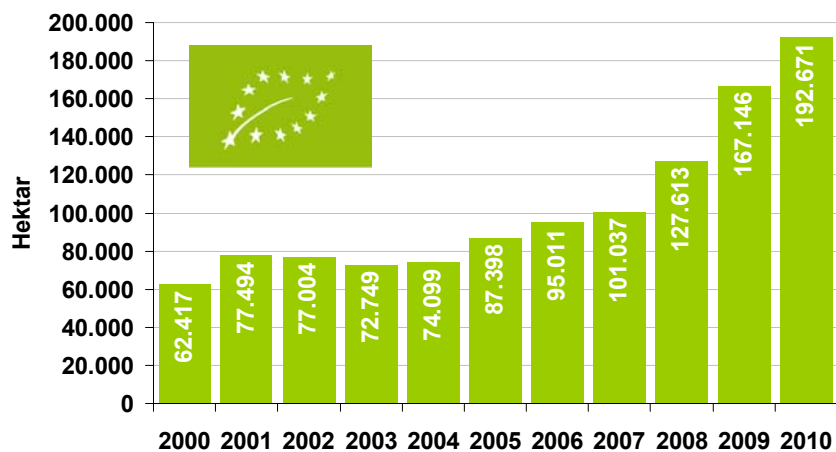
FEDERBIO

I primi 10 Paesi per incidenza della viticoltura biologica



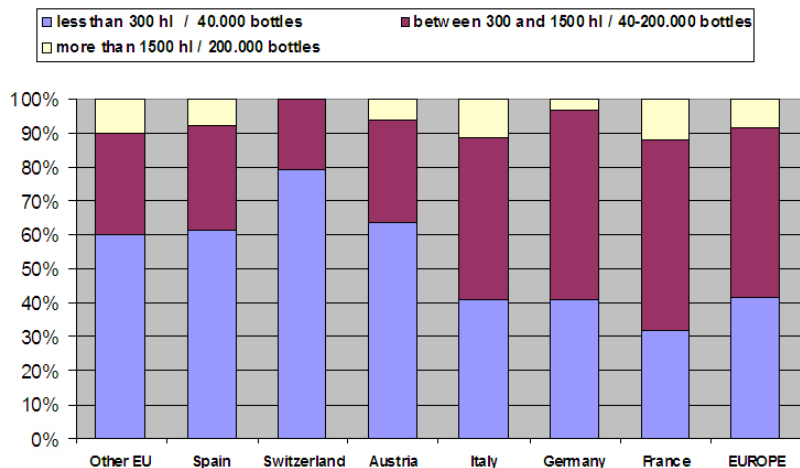
FEDERBIO

Sviluppo della viticoltura bio in Europa 2000-2010

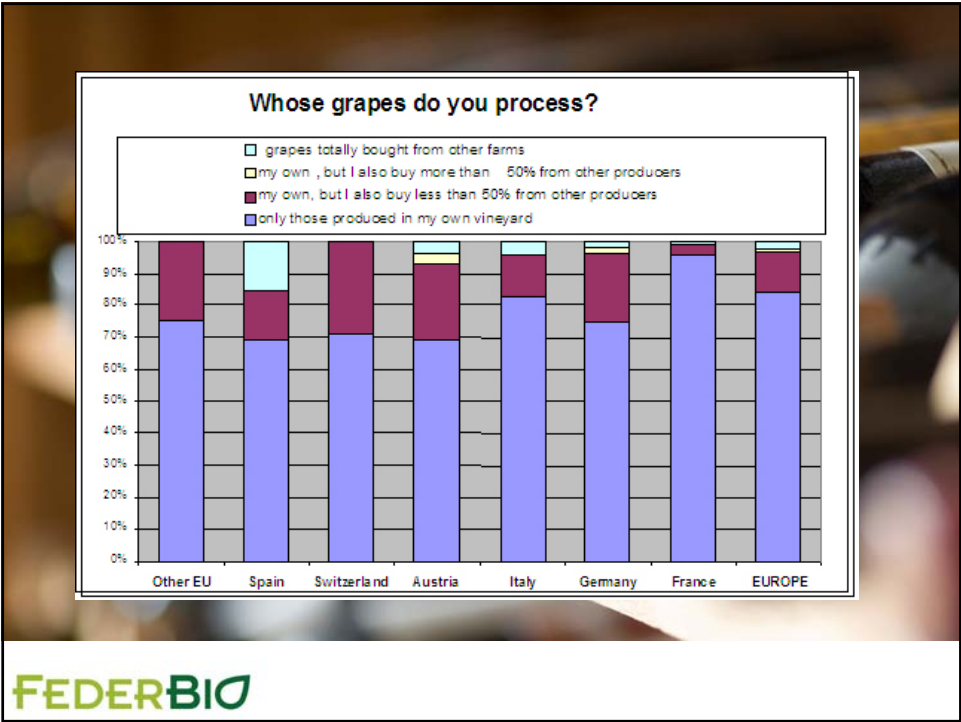
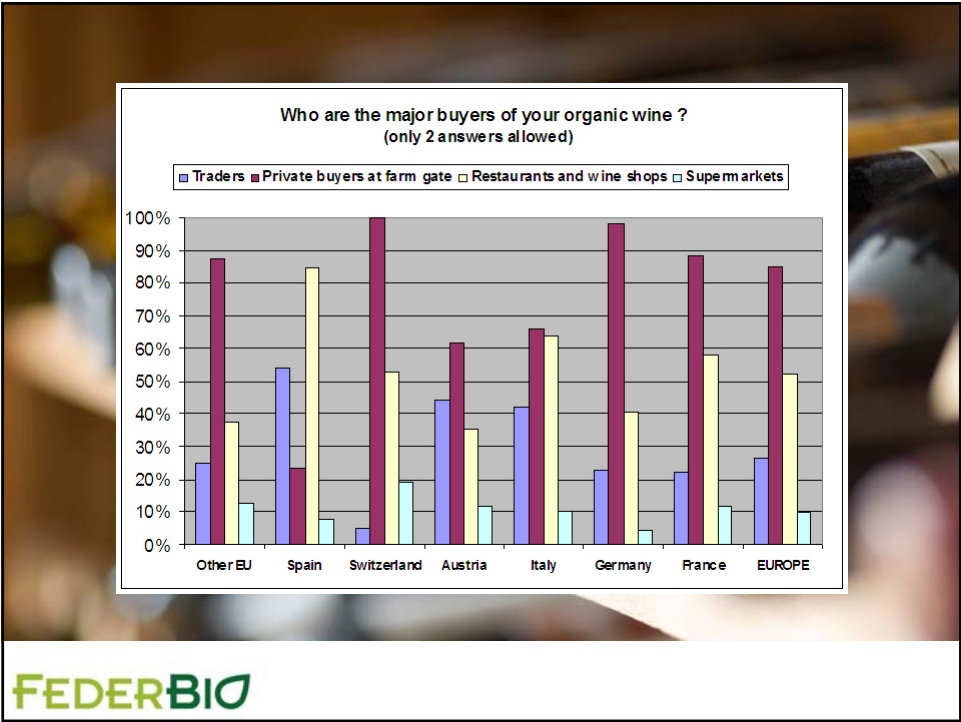


FEDERBIO

How much organic wine do you produce?



FEDERBIO



anno	Conversione	Biologico	Totale	incremento %
2009	15.751	26.984	42.735	
2010	21.214	29.349	50.563	18,32%
2011	18.172	33.171	51.343	1,54%
2012	19.709	36.261	55.969	9,01%

Ettari biologici totali da Ministero politiche agricole

CANTINE BIOLOGICHE 2009-2012

2012	Cantine - Vinificazione	1120
2011	Cantine - Vinificazione	699
2010	Cantine - Vinificazione	617
2009	Cantine - Vinificazione	753

Cantine biologiche controllate da organismi di controllo soci Federbio

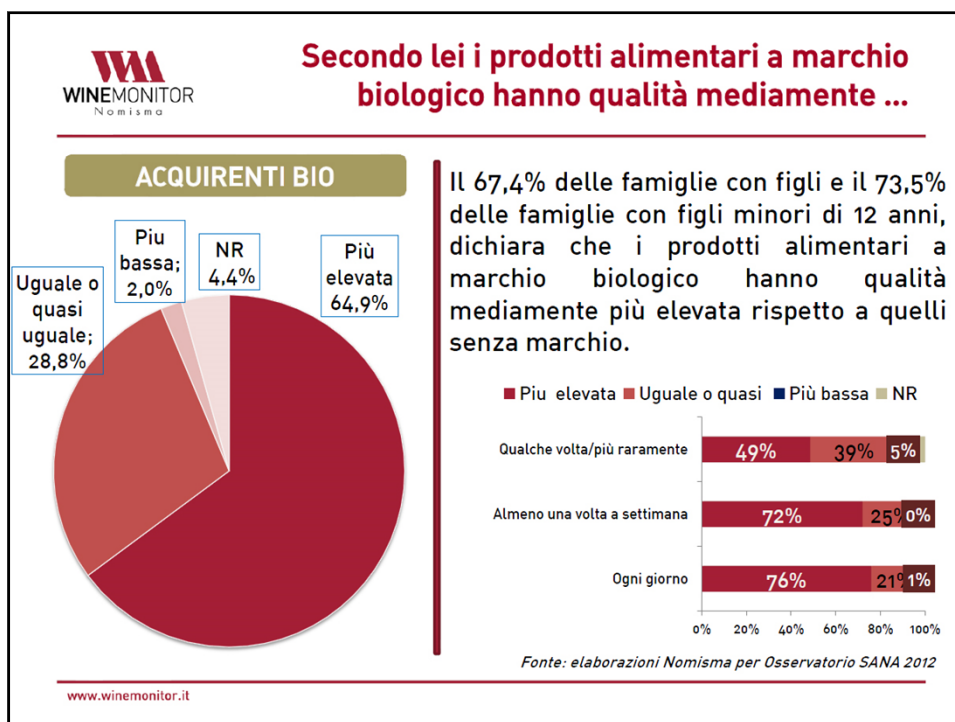
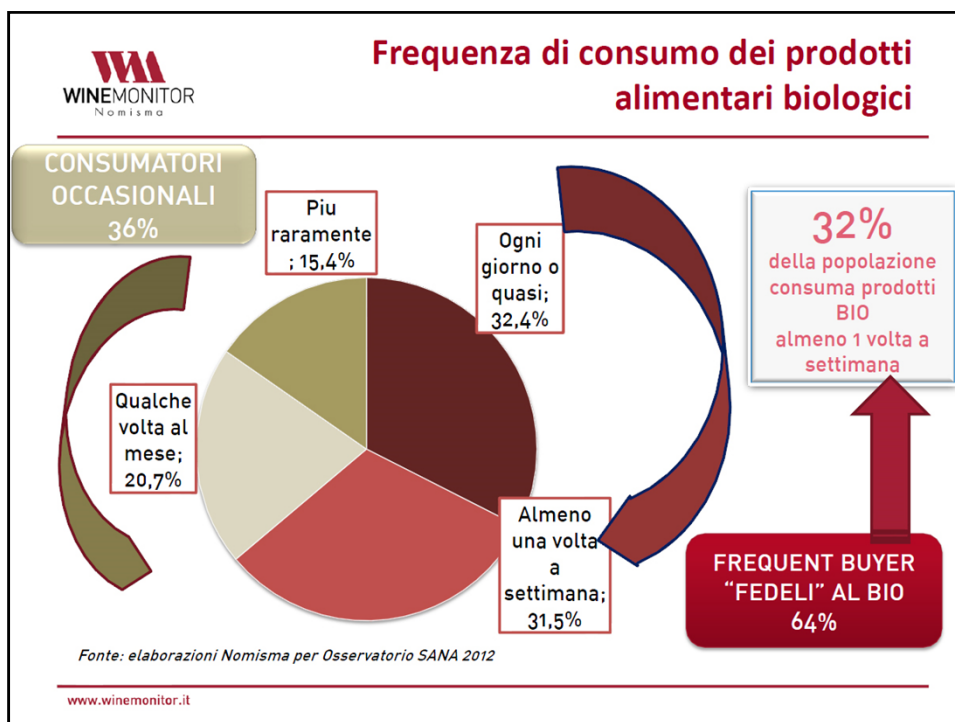
FEDERBIO

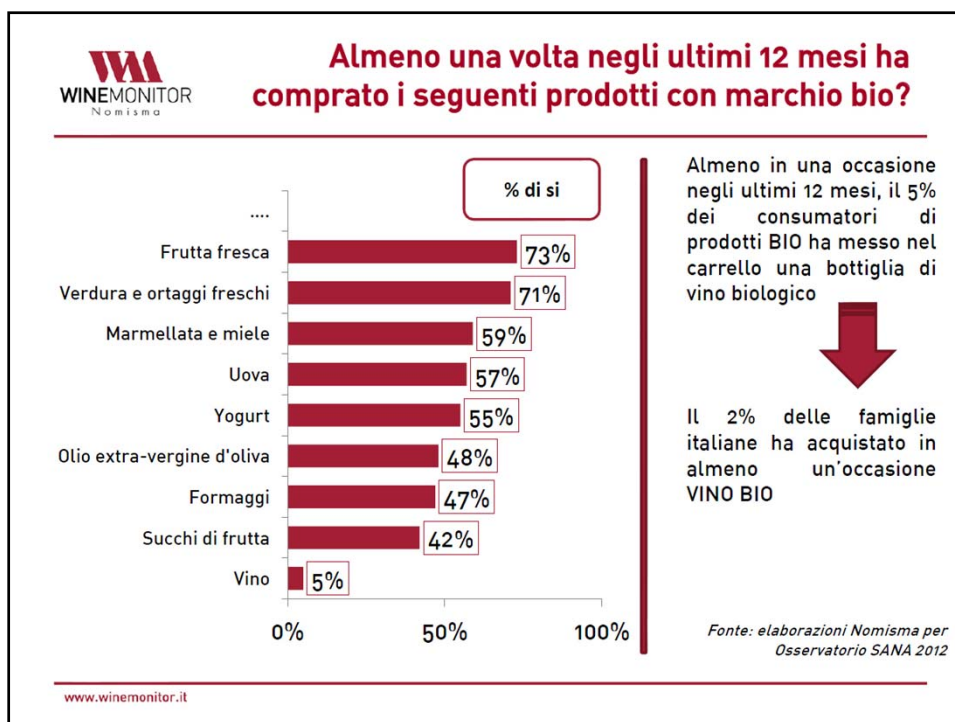
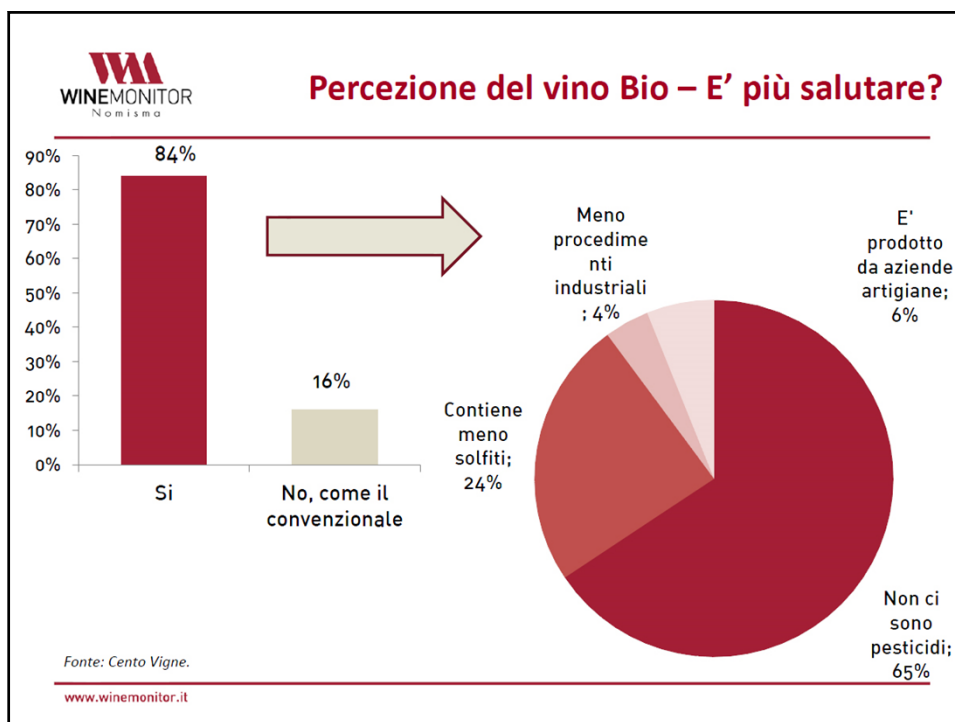
SUPERFICIE A VITE BIOLOGICA PER REGIONE 2009-2012

anno	ABRUZZO	BASILICATA	CALABRIA	CAMPANIA	EMILIA ROMAGNA	FRIULI VG	LAZIO	LIGURIA	LOMBARDIA	MARCHE	MOLISE	PIEMONTE	PP. AA. TN BZ	PUGLIA	SARDEGNA	SICILIA	TOSCANA	UMBRIA	VALDAOSTA	VENETO
2012	3.692	540	1.922	7678	2.282	494	1.737	37	919	3.272	262	1.032	379	8.665	624	15.176	8.589	599	15	2.353
2011	3.718	590	1.788	7178	2.116	386	1.766	35	1.087	3.292	288	925	246	6.787	585	14.653	7.156	494	13	2.061
2010	3.678	647	1.7138	6848	2.015	376	1.792	36	703	3.270	216	765	245	4.388	528	15.915	5.932	449	4	1.820
2009	3.225	1.107	1.4888	739	2.166	376	1.638	39	952	3.366	207	818	165	6.706	647	9.199	5.266	496	4	1.522

Ettari biologici organismi di controllo soci Federbio

FEDERBIO







Oggi in Italia il 53% delle famiglie acquista un prodotto alimentare biologico e il 5% di queste compra vino bio. Questo significa che **sul 2% delle tavole delle famiglie italiane è presente il vino biologico** in almeno una occasione.

24.611.766 famiglie in Italia, il 2% è 492.235

FEDERBIO

4th International Conference of the Academy of Wine

Eco-Premium or Eco-Ponality?

DO AUSTRALIAN WINE CONSUMERS V

Dr. Hervé Renaud
Ehrenberg-Bass Institute for Marketing Science,
GPO Box 2471 Adelaide, South /
Telephone: (61 8) 8302 /
Facsimile: (61 8) 8302 /
Email: hervre.renaud@unisa.edu.au

Dr. Simone Mueller
Research Fellow Wine-Ma
Ehrenberg-Bass Institute for Marketing Science,
GPO Box 2471 Adelaide, South /
Telephone: (61 8) 8302 /
Facsimile: (61 8) 8302 /
Email: simone.mueller@unisa.edu.au

Phoebe Chryl
Research Assistant
Ehrenberg-Bass Institute for Marketing Science,
GPO Box 2471 Adelaide, South /
Email: chryl22@unisa.edu.au

Prof Larry Lockshin
Ehrenberg-Bass Institute for Marketing Science,
GPO Box 2471 Adelaide, South /
Telephone: (61 8) 8302 /
Facsimile: (61 8) 8302 /
Email: larry.lockshin@unisa.edu.au

Eco-labels and quality in t

Magali I
UCLA Institute of the Envir
and Anderson Scho
LaKretz Hall
Los Angeles,
310-825 /
delmas@ucla.edu

AN

Neil Le
UCLA Institute of the Envir
and Econ
LaKretz Hall
Los Angeles,
nell@econ.ucla.edu

Editor
Victor
Ginsburgh

**AMERICAN ASSOCIATION
OF WINE ECONOMISTS**

**AAWE WORKING PAPER
No. 14**

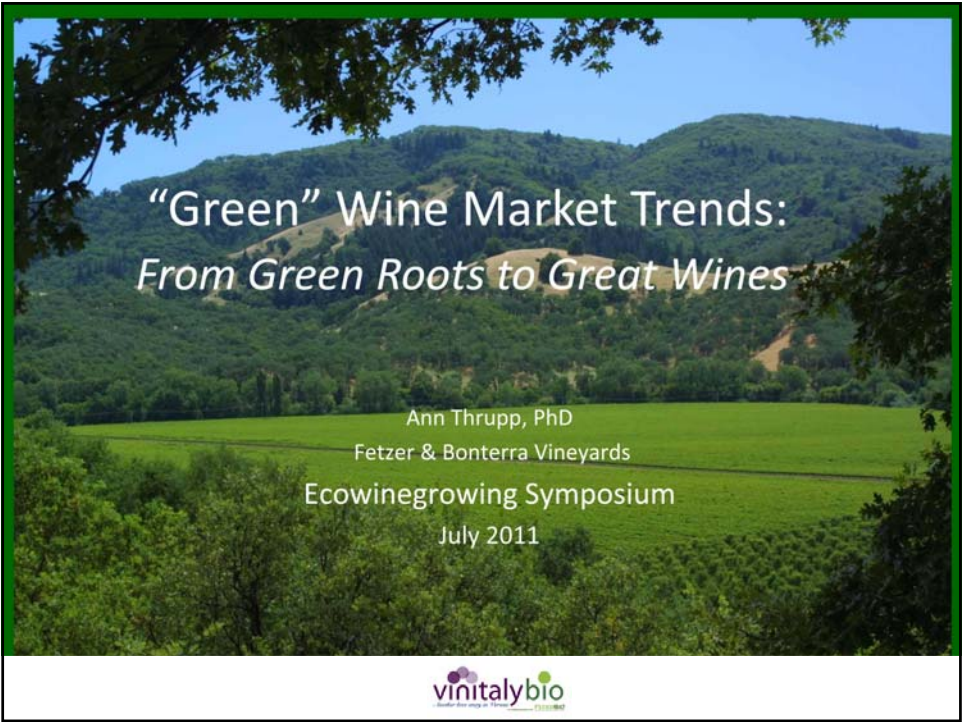
**CEAGO VINEGARDEN:
HOW GREEN IS YOUR WINE?
ENVIRONMENTAL DIFFERENTIATION
STRATEGY THROUGH ECO-LABELS**

**Magali A. Delmas
Vered Doctori-Blass
Kara Shuster**

March 2008

www.wine-economics.org

vinitalybio
...because there's more to wine than meets the eye



"Green" Wine Market Trends: From Green Roots to Great Wines

Ann Thrupp, PhD
Fetzer & Bonterra Vineyards
Ecovinegrowing Symposium
July 2011

 vitalitybio
...better than any in the world

MARKETS

THE ORGANIC GROWTH OF BIODYNAMIC WINES

The American wine market, a world of critter brands, organic certification and appellation wines, is already confusing enough to the average consumer. But the emerging biodynamic category may manage to achieve the sales that organic wines haven't, suggests Larry Walker.

Organic wine sales in the United States have never hit the pace that many expected. While organic food sales in general are growing at a 20% plus annual rate, organic wine sales have lagged. So it is a little surprising to find some optimism. No producers of biodynamic wines, a category that would seem even more difficult to establish. However, participants and speakers at a Biodynamic Wine Forum held in San Francisco last September were cautiously upbeat. Mike Berger, of Berger Family Vineyards, said 2007 was the "tipping point" for biodynamic wines.

"Biodynamic wines are perceived by the trade as very high quality wines on a global level. Retailers and consumers are getting behind the wines in a big way. However, they are a hard sell," he said. "We have found that retailers who are not on the fence selling the wines are a big help." That, though, can be said about all wines. More to the point, he continued that "those restaurants that feature fresh, local produce and really care about the food can be a huge help. They get what we are trying to do."

Berger added, "To be honest, consumers are still somewhat confused by the terminology, what is biodynamic, what is organic, but they are very sensitive now to environmental issues and biodynamic wines are seen as a holistic and friendly approach to the world."

There is also some confusion about the definition of an organic wine. In Europe, producers are allowed to add sulfites to wine to enhance stability. In

Berger first introduced a biodynamic (BD) wine in 2002. At the time, it was a small part of the winery's production. "We soon realized that the trade and the public responded that we go all the way. We started working with growers and put a program in place in 2003. For the first time in 2007, all of our grapes were certified biodynamic or organic or sustainable."

But how does a BD wine differ from an organic wine? The easy answer is that BD wines are a step beyond organic. Both kinds of producers reject the use of chemical fertilizers, pesticides, herbicides, fungicides or fungicides. No herbicides, antibiotics, growth regulators or genetically modified organisms can be used, the same as with organic growers.

All that or the fact that some go into biodynamics, it becomes difficult if not impossible to offer a brief definition. Privately, some growers agree that consumer confusion is only natural when biodynamics involves farming practices that seem downright weird and even less than organic. An international organization called Demeter is the major certifying agency for biodynamic agriculture.

Although there is plenty of paper work, certification is not just a matter of filling in a few forms. It involves a three year program following guidelines related to cover crops, crop rotation and the generation and creation of wild spaces on the farm, as well as the use of various biodynamic preparations. The concept of biodynamic agriculture dates back to 1924 and comes from the work of Austrian philosopher

Biodynamic wines are not a rich man's game, but a committed farmer's game.

Phil Dole, winemaker

In the United States, a wine with outline added cannot be labeled as fully organic. Indeed, the label may only bear the mention that the wine is made from organically grown grapes. Wines made without the addition of sulfites have often been of greater quality, especially in the 1980s and early 1990s, when many domestic winemakers were still learning to deal with the issue.

Berger agreed that the image of organic wines has been hurt by the quality of some wines. "With biodynamics, however, we've got a chance to do it right and let the wine speak for itself," he said. "If you have credibility in dealing with environmental issues, the organic wines of biodynamic wines, it's very difficult to recover it."

The current issue and full text archive of this journal is available at <http://www.emeraldinsight.com/0950-4203.htm>

BFJ 104/3/45

The production and marketing of organic wine in Sicily

B. Ficini and G. Guccione
University of Palermo, Palermo, Italy

of Marketing, Production planning and control

ABSTRACT

its study to investigate the role of consumers' perceptions of wine expertise, and eco-friendly attitudes on their purchase intentions of red variety with statements relating to perceptions of wine attributes, eco-friendly attitudes, purchase intentions, and socio-demographics consumers. Multiple regression analysis is used to investigate the users' perceptions of organic wine attributes, perceived wine expertise, and purchase intentions.

INTRODUCTION

significant beverage around the world. In 2003, over 233 million cases United States and sales totaled \$21,800 million (Adam Wine Handbook, 2004). The Organic Trade Association, U.S. sales of wines made with 180 million in 2005, a 28 percent increase over the previous year. Such more than one percent of the total U.S. domestic wine market, but the organic wine sales to grow about 17 percent a year through 2008 (Singh,

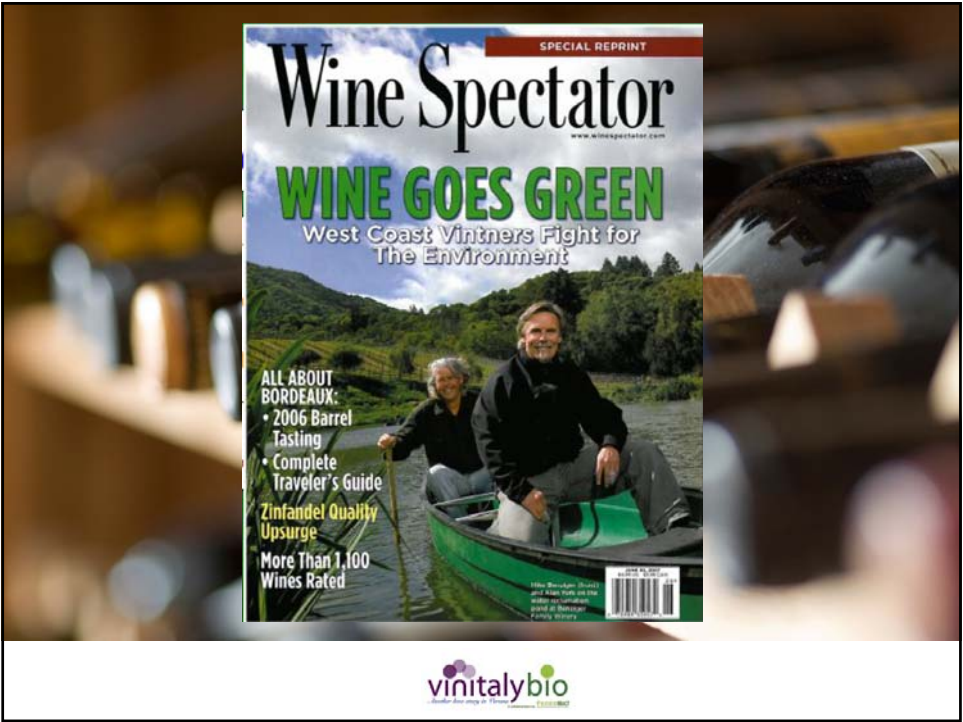
on of "organic wine production", in relation to wine producers in the West of Sicily. It should be noted that the Region of Sicily, 00 hectares, is one of the most important vined regions in Sicily and, of particular importance, 00 hectares of organically grown vineyards. This 37 per cent of the Italian scenario. action was carried out using both statistics with the wine producers themselves. The methods, distribution outlets, home markets

n to wine producers in the West of Sicily. region, organic farming is catching on in the al products. Even organic wine growing is now covered by organic cultivation and the also for the implementation of Reg. 2079/92, companies dedicated to producing organic are adding it to their product range, is

172nd EAAE European Seminar: Organic Food 7-10 June 2008, five study conducted by the authors, however, M. J. L. and J. G. F. is responsible for paragraph 5. The introduction and the conclusion were jointly

people have become increasingly environmentally conscious. According to the survey, environmentally conscious consumers are now purchasing products that affect the natural environment and have willingness to purchase organic products. Further, increasing number of health-conscious consumers is reaching not just for organic food, but for organic wine as well.

 vitalitybio
...better than any in the world











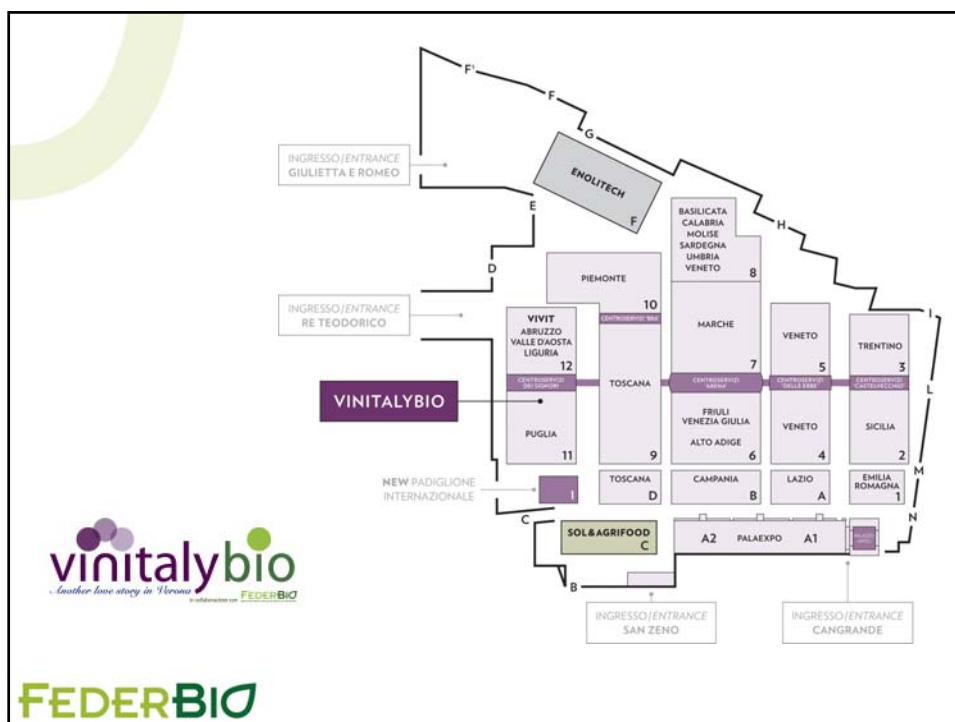


3 incontri con i produttori Franciacorta - Roma - Bari

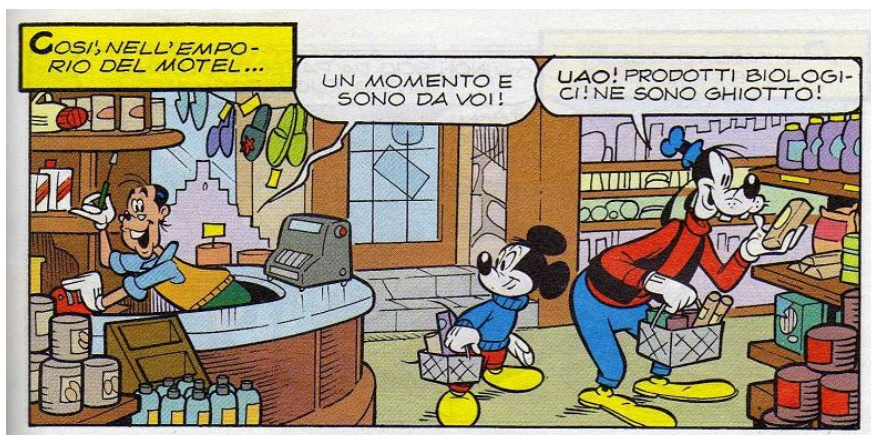


www.federbio.it



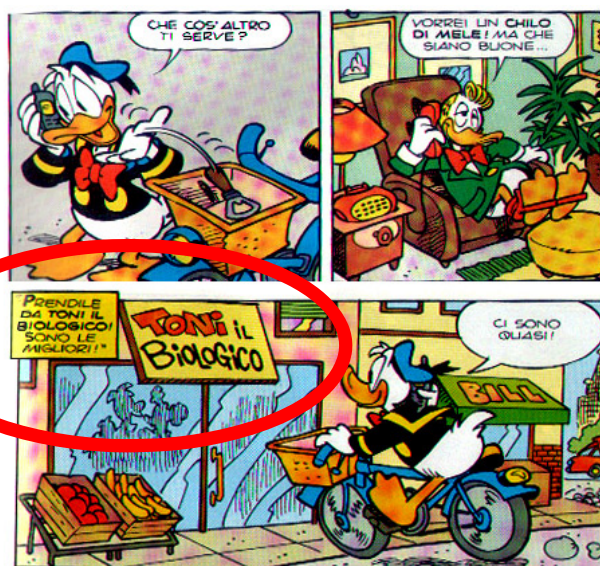


Il biologico in Italia ha testimoni autorevoli



Topolino, 2009

FEDERBIO



Topolino, 2004

FEDERBIO

