Organic Farming in Italy 2007

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For updates check Organic-World.net

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Current Developments

In 2005, after a period of stagnation the number of farms and the land under organic management went up again. Currently more than one million hectares of Italy’s agricultural land is organic (see European organic farming statistics at Organic-World.net).

In 2003 and 2004, the number of organic farms in Italy had decreased. Especially in Southern Italy and on the Islands (Sicily, Sardinia) in the past years many farms converted to organic farming / not because of market or ecological reasons, but mainly because of the state subsidies. In some regions aids are not available any more, and many farms have left the organic control system. It has to be said though, that for the most part they continue farming organically, even though they are selling their products with no label in the non-organic market.

It is of interest that no market oriented farm went back to the conventional system.

History and Statistical Development of Organic Farming

In Italy the earliest pioneering experiences in organic agriculture date back to the nineteen-sixties, but only took off in the nineteen-seventies, involving more and more farmers and consumers seeking an improved quality of life and consumption.

During the mid eighties, the first local coordination agencies established the “Commissione Nazionale Cos’è Biologico” (National Commission for Organic Agriculture). Made up of representatives of organisations and consumers’ associations from each Italian region,
the Commission established the first nation-wide self-regulatory standards for organic farming.

Once EU-Regulation 2092/91 was implemented, the numerous small associations of organic farmers and the producers and consumers committees operating in every region reorganised themselves, joining forces through mergers and a federative network. Today, there are around 20 officially recognised certification agencies operating in Italy (see list of European inspection bodies).

In the 1990s the organic sector in Italy showed one of the largest average annual growth rates in Europe. Between 2002 and 2004 the number of farms decreased, because in some regions aids were not available any more.

Since 2005 the number of organic operators as well as the organic/in-conversion land area is on the rise again.

For the statistics, including regional information, a detailed document is available at the >>SINAB homepage.

Organic Agriculture Organisations

- Italy’s Certifying and Inspection Bodies
- Federazione Italiana per l’Agricoltura Organica FIAO
- Sistema d’Informazione nazionale sull’agricoltura biologica SINAB
- Biobank
- AgriBioMediterraneo
- Consorzio ModenaBio 2008

Italy’s Certifying and Inspection Bodies

In 1990 there were only four certifying-bodies/ producers’ associations in Italy. These were AIAB, Suolo e Salute, CCPB and the Biodynamic Association, which later gave rise to a certifying body named CODEX.

AIAB was the largest association, grouping together many local-regional grassroots associations. AIAB certification is now handled by ICEA (see below).

Suolo e Salute (established in 1969) and the Biodynamic Association (established in 1947) were the historical cultural/producers’ group.

CCPB is a cooperative (established in 1988) that supports cooperatives, processors and large co-op retailers.

The Biodynamic Association later gave rise to a certifying body named CODEX.

At the end of 1993, a year after the...
EU regulation on organic agriculture had come into force, the Italian Minister of Agriculture recognised three new organisations (AMAB, AgrEcoBio and BioAgriCoop / Bioagricert), bringing the total number of certifying bodies up to seven.

AMAB certification is now handled by the Istituto Mediterraneo di Certificazione.

In December 1996, the Ministry of Agriculture (the competent authority) confirmed the registration of all certifying bodies (some of which had changed their names) except AgrEcoBio. This association did not conform to EN 45011 standards, and its place was taken over by two new bodies (QC&I and Ecocert) both of whom were recognised and registered.

In early 1999 another control body, BIOS, was recognised.

In 2000 AIAB together with DEMETER Italy, ANAB (the Italian BioBuilding Association), ACU (Consumers association) and Banca ETICA (Ethic Bank) founded ICEA, which acts as an certification body.

Today, there are around 20 officially recognised inspection agencies operating in Italy (and in German speaking South Tyrol four German bodies are authorized; see list below; for updates list see list of European inspection bodies).

**FederBio - Federazione Italiana per l’Agricoltura Organica FIAO**

Federazione Italiana per l’Agricoltura Organica (FIAO), today FederBio, founded in 1992, is the federation of the principal organic and biodynamic producer and certifying organisations. FederBio represents the sector at a political level and informs the public about organic farming.

**Biobank**

The publisher Distilleria informs consumers and producers about organic farming. Among others it publishes “Tutto Bio”, which is a complete guide to organic and ecologically safe products.

Its Internet site offers a wide range of information.

Bio Europe 2004 is a directory of all organic operators in the European market. Biobank plans an annual update of the book. The directory includes general texts about organic farming in Europe as well as 5000 addresses. For more info see the Biobank Homepage.
Sistema d'Informazione nazionale sull'agricoltura biologica
SINAB

A national web site on organic farming was implemented early 2001. The national information system on organic farming (SINAB) - Sistema Unico Nazionale sull'Agricoltura Biologica - is available at http://www.sinab.it.

AgriBioMediterraneo

In 1991 in the Italian town of Vignola, representatives from the organic movements of Italy and the other Mediterranean countries gathered together at "AgriBioMediterraneo". Many common problems were discussed, including issues on standards and certification (too often too central and north European centred) and markets (where the producers were often competing against each other because of the northern traders). The "missing" research on the specific problems of Mediterranean crops was also discussed with representatives from California (sharing similar problems with crops and climate).

After the first Vignola Conference started a series of international AgriBioMediterraneo conferences (every year from 1991 to 1995) in different countries: Barcelona (Spain), Athens (Greece), Montpellier (France), Izmir (Turkey), Marseilles (France), Sicily (Italy). At the assembly in Bari in 1997 the IFOAM regional group AgriBioMediterraneo was established.

Regional Distribution of Organic Farms

Most of the Italian organic farms are in the South and the Islands (32%), even though with the recent decrease of the numbers of farms the share of the farms in the South went down.

In Sicily organic farming developed at a very fast rate, with the number of farms increasing 2.5 times and land area almost doubling between 1993 and 1995. In comparison, the average rate of growth for the whole country was 123% and 126%, respectively, for the same period. The development in Sardinia is more recent, and mainly due to the application of EU Regulation 2078/92. When pastures were admitted to qualify for aid, many sheep-grazing pastures were converted into organic ones (for the most part, Sardinian farmers are sheep breeders and producers of the well known "pecorino" cheese). However, on both islands the number of organic farms recently dropped.

Tuscany and Emilia-Romagna have experienced pioneering organic movements dating back to the early 1980s. Indeed, of the certifying bodies five (ICEA, BioAgriCert, Codex, CCPB, QC&I) are based in Emilia-Romagna or Tuscany. Olive trees are grown by a large part of Tuscany’s organic farmers, while cereals and fruit & vegetables prevail in Emilia-Romagna. Both regional governments have approved special laws after EU Regulations 2092/91 and 2078/92 to regulate and promote organic farming.

Apulia in the South of Italy has also had a very recent growth, mainly due to policy support. Its main crops are durum wheat, olive oil and vegetables.
For the statistics 2006, including regional information, a detailed document is available at the >>SINAB homepage.

National and Regional Legislation on Organic Farming in Italy/EU-Regulation 2092/91

In Italy EU-Regulation 2092/91 has been fully operational since 1992. 16 certifying bodies are registered as certifying bodies under this regulation (see “Organisations” chapter). The Ministry of Agriculture is presently the competent authority.

With the implementation of EU-Regulation 2092/91 criteria for the licensing of inspection bodies as well as specific criteria regarding the management and the procedures of the certification system, conforming to the EN 45011 standards were established. Still lacking, however, is a uniform national framework for inspections and certification, with a task force of full-time national inspectors to supervise the regional governments and certifying bodies. Also needed is a national logo. In the last two years the use of the EU logo is increasing.

In May 2000, Directorate F (Food and Veterinary Office) of Health and Consumer Protection Directorate General of the European Commission carried out a mission to verify the application of Council Regulation no. 2092/91 in Italy (download report).

All information about organic legislation and a comprehensive Italian and international press review (in Italian) is provided by Bollettino bio (www.greenplanet.net), a free weekly newsletter with about 18,000 subscribers).

The Market

- The Italian Organic Market
- Product Range
- The Consumers
- Marketing Channels
  - Specialised Shops
  - Organic Products in Supermarkets
  - Organic Catering
  - Organic food in school canteens
- The main Actors of the Organic Market
- Training in the Marketing of Organic Products

A report on various aspects of the Italian market in 2002/2003 by Roberto Pinton can be downloaded here.

The Italian Organic Market

The economic value of the Italian organic market was about 1.85 billion Euros in 2007, and the average Italian spent 32 Euros on organic food in 2008 (provisional Source: Pinton Organic Consulting). The growth trend is very strong.

Many fairs and markets are now devoted to organic agriculture. The largest fair is held in Bologna in September (SANA).

http://www.organic-europe.net/country_reports/italy/default.asp 27.06.2011
Many national and local level markets are held throughout the country, mainly open air, from June to October. In some towns a market is held monthly or weekly, and is often associated with the traditional town market.

Product Range

According to Pinton Organic Consulting, in 2006 exports from Italy were valued at 0.75 billion Euros. Over a third of all Italian organic production is exported, mainly to other European countries, but also to the USA and Japan.

Overview: Range of Italian organic export products

- Fruit and vegetables (top-quality, owing to the favourable climatic conditions and the professional skill of the producers)
- Extra virgin olive oil (olive trees have been grown in Italy since ancient times, and Italian olives offer a great variety of scents and flavours, ranging from the most delicate aroma to an intense, fruity bouquet)
- Wine (with excellent award-winning products highly praised in the most important international wine events).
- Cheeses (ranging from the celebrated Parmigiano Reggiano to the rarest traditional specialities).
- Sauces, condiments and delicatessen from Italy's rich culinary heritage.
- Pasta (whole-wheat, white, either plain or with herbs or spices)
- Ice-cream (the Italian tradition in ice-cream making has a well-deserved fame)
- Dried fruits
- Industrial products
- Grains and pulses

Today consortia and trading companies increasingly plan production and crops together with single farms. To steer the growth of the organic segment safely, efficiently and with appropriate instruments considerable investments are necessary.

This will ensure an increasingly larger choice of products on offer, a better service, guaranteed product quality, and the continuous monitoring of the evolution of consumer demands. This, in turn, will mean an improved planning of product availability for trading operators and for the consumers as well as lower prices and higher quality standards.

The Consumers

The largest concentration of consumers buying organic products is in the northern regions of Italy, where the industrial and economic structure is stronger. Most of the organic products are however produced in the southern, more agriculturally oriented, and warmer part of the country.

A survey run in May 2001 by Demoskopea, a leading market research institute, has shown that 73% of Italians give a right definition of organics and know some key characteristics (no chemicals, more naturalness), 22 % give not wrong but vague definitions ("healthy, genuine, safer").

According research by Ispo (a leading research institute, September 2004) 77% of the Italian adults think organic food is healthier, 64% 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). To eat high quality, better-tasting and ecologically sound food, 68% of Italians are surely (26%) or maybe (42%) willing to pay a higher price. Regular consumers in 2004 are 14% (11% two years ago).

According to IRI Infoscan, in 2002 8,093,000 Italian families have bought organics (7,910,000 in 2001), mostly in North western Italy (34.4%), North eastern (26.4%) and the Central regions (22.6%).

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.

Marketing Channels

Specialised Shops

There are about 1000 shops in Italy that specialise 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 Naturasì, with about 30 franchisee superettes (some are butchers, called "Carnesì").

Organic Products in Supermarkets

A market poll carried out in 1999 revealed that organic foodstuffs such as dairy products and packed foods were carried by 95% of Italian supermarkets. Organic vegetables, though, were available in only 19% of Italian supermarkets, mainly in the northern regions and in Tuscany.

According to the same survey, if the average price of conventional products is 100, the organic equivalent tips the scales at 136. Recently, however, all the greatest supermarket chains have launched their own private label organic line (Coop, Esselunga, Conad, Giesse, Pam, etc). Esselunga Bio line includes about four hundred items. In 1999 the number of supermarkets with an organic corner exceeded the number of specialised organic shops, and in 2000 they win for market share.

Organic Catering

A very interesting and rapidly growing phenomenon is that of organic school catererias. Originating from a 1990s pilot project in the Cesena area, they now serve more than 600,000 children from nursery to middle schools in metropolitan areas (Rome, Bologna, Turin, Padua) as well as in smaller towns. Since 1999 there have been laws compelling municipalities and hospitals to use daily some organic, typical and traditional food in their catering services. The region Friuli Venezia Giulia supports municipalities, which adopt organic catering with a considerable grant (30% of the total cost). Also Tuscany and the Marche give contributions to Municipalities so that prices can be lowered. According to a recent GAIN report 26% of organic wholesale
purchases were made by domestic communal caterers and schools ("Legge 23 Dicembre 1999, n. 488 – Organics in schools and hospitals").

The regional law no. 29/2002 of Emilia Romagna imposes a 100% organic diet for nursery and primary schools (from 3 months to 10 years), and at least 35% in advanced schools, universities and hospitals. Other products have to be traditional, typical or coming from certified IPM. As current contracts will expire, school meals will be put out to the new contract, and gradually, before 2005, in every school of the region all 350,000 children (and 35,000 teachers and attendants) will eat organic. The organic movement cooperated closely with the regional government. Prober, the regional association of organic growers, processing companies and traders carried out a study about regional production and supplying capacity. It compiled a table with the main caterers and now is commissioned by the Regional Government to run www.sportellomensebio.it, an information bureau about organics in school meals. The internet site is targeted at municipalities, parents, food service and catering companies.

The main Actors of the Organic Market

Besides organic pioneers, some of which are now joint-stock companies with interesting turnover (even 50 million Euro of gross sales) like Brio, Ecor, Kì, Âlmaverde , Alese Nero, several not specialised companies have started organic lines.

For example the dairies like Scaldasole (a division of Plada, Heinz group), Granarolo (the most important Italian dairy co-op), some municipal ones (Brescia, Florence, Trento etc); Monini (olive oil), Carapelli (olive oil), Galbusera (bakery), Polli (pickles) and many others.

These entries in the organic market led to a great visibility (tv commercials, ads in magazines and newspapers, useful not only for the advertisers, but for the whole organic industry).

Training in the Marketing of Organic Products

Bocconi University (founded in Milan in 1902 as one of the first Italian institutions of higher education and research in economics, offers degrees in economics and related subjects and for over 30 years has been active in post-graduate managerial and executive education) in its School of Management organised in 2000, 2001 and 2002 intensive courses about organic marketing, to which manager of large and medium food companies and regional governments in tens took part (some professors were from the University teaching team, some others from the organic movement).

Research, Teaching and Training

If organic farming is to have the opportunity to continue developing it will require research, development and advice. In Italy this is still often completely absent. Even though the situation has improved considerably in the past years, organic research suffers from a lack of funding. Issues particular to Mediterranean organic farming systems urgently need to be confronted. Otherwise insufficient research, education and extension may severely limit the future development of the organic sector in Italy.

The researchers involved in organic agriculture established a network within which their activities are coordinated, the Gruppo di Ricerca in
Agricoltura Biologica.

Recently the Italian Foundation for Organic Farming Research (Fondazione Italiana per la Ricerca in Agricoltura Biologica e Biodinamica) was founded, in order to promote research.

In some regions funds are provided for training of farmers and for demonstration activities (e.g. Emilia-Romagna). This allowed a useful interchange between organic farmers within a region and with organic farmers from other regions in Europe.

Some academic Masters’ level and specialisation courses are now being offered (e.g. Florence). At the Agronomic Institute at Bari (Istituto Agronomico Mediterraneo di Bari, IAMB) a Master Course on Mediterranean Organic Farming is offered.

A detailed report on the current status of organic farming research (2006) in Italy is available at the Core Organic web portal.

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