Allgato 5

FACTS AND FIGURES ON ORGANIC FARMING IN ITALY 2020

THEMATIC VOLUME 6

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Graphic design
Studio Ruggieri Poggi

Print
Chieco Sistemi

CONTENT

PROJECT STEERING COMMITTEE
Roberta Cafiero
Fabio Del Bravo
Oreste Gerini
Maurizio Raeli

TECHNICAL COORDINATION
Antonella Giuliano
Patrizia Pugliese

WORKING GROUP

ISMEA
Delizia Del Bello
Antonella Giuliano
Riccardo Meo
Patrizia Nocella
Marilena Perrone

CIHEAM Bari
Marie Reine Bteich
Fabiana Crescenzi
Luigi Guarrera
Patrizia Pugliese

Francesco Solfanelli
(Università Politecnica
delle Marche)

FOREWORD

"Facts and Figures on Organic Farming in Italy 2019" is the sixth thematic volume of a series of publications within the Project for the development and implementation of activities aimed at defining the economic dimension of organic farming across the supply chain: DIMECOBIO III, funded by the Ministry of Agriculture, Food and Forestry Policies, with which ISMEA and CHIEAM Bari collaborate to gather data and information available to analyze the sector as a whole and some specific segments that have a comparable economic importance or can have a significant development potential.

Each thematic volume is intended as a working or informative tool with different targets, to basically provide a background for reflections and exchange among practitioners (operators, professionals, experts) and a reference for further investigation or analyses to support institutional decisions and strategies.

The series comprises a total of six publications.

Three thematic volumes are focused on specific sectors. The scenarios outlined for each segment of the organic industry will include economic and market data, a review of the research projects that have been carried out and some good practices useful for the dissemination of ideas, innovations and practical solutions to specific problems. The editorial choices and the content organization seek to provide practical insights also to evaluate business decisions and strategies, identify information needs and expectations not only from a technical and agricultural point of view.

In addition, the aim is also to interpret the current state of innovation within the industry, and assess whether the "landscape" is suitable for the adoption or improvement of modern agronomic approaches related, for instance, to precision economy, circular economy, sustainability of all the components, digitization or even to identify the actual growth prospects, analyze how far research has gone and understand to what extent the results achieved have been disseminated or, finally, to reconcile new demands and research.

Three volumes present, one every year, in English for wider circulation and visibility, the statistics of the Italian organic sector focusing on structural aspects, including operators, areas and crops, and market aspects, with further details on prices and consumption and on the import of organic products from third countries.

ACRONYMS

A.P.
Autonomous Province

CIHEAM Bari
Mediterranean Agronomic Institute of Bari

CN
Combined Nomenclature

EC
European Commission

EU
European Union

FMCG
Fast-Moving Consumer Goods

FSS
Farm structure survey

GDP
Gross Domestic Product

HORECA
Hotellerie-Restaurant-Café

ISMEA
Institute of Services for the Agricultural and Food Market

ISTAT
Italian National Institute of Statistics

MiPAAF
Ministry of Agriculture, Food and Forestry Policies

PGI
Protected Geographical Indication

SIB
Organic Information System

SINAB
National Information System on Organic Agriculture

TARIC
Integrated Community Rate

TRACES
TRAde Control and Expert System

UAA
Utilised Agricultural Area

UNIVPM
Polytechnic University of Marche

AREAS, CROPS, OPERATORS AND LIVESTOCK

FIGURES ON ORGANIC FARMING

Data
MiPAAF
Ministry of Agriculture, Food and Forestry Policies

Sources
Control Bodies
Regional Authorities
SIB
Organic Information System

Compiled by
SINAB
National Information System on Organic Farming
Delizia Del Bello
Fabiana Crescenzi

As of 31 December 2019, **organic farming in Italy** accounted for almost 2 million hectares of cultivated land and over 80,000 operators. Since 2010 the increase recorded has totalled more than 879 thousand hectares and 29 thousand farms **(Chart 1)**.

The **area under organic farming** reached **1,993,236 hectares**, which means 35 thousand hectares more compared to 2018, with only a **2%** increase. In line with national agricultural trends, production continues to be based on 3 main crop types making up more than 60% of the total: permanent grassland (**551,074 ha**), plants harvested green (**396,748 ha**) and cereals (**330,284 ha**). Following, by extent, are organic olive groves (**242,708 ha**) and vineyards (**109,423 ha**). With respect to 2018, the percentage change of the area covered by these crop types remains stable (with an approximately 1% increase) for plants harvested green and cereals, while permanent grassland and olive trees grow by 2% and the vineyards by 3% **(Table 1)**.

Among arable crops and vegetable crops, which rise by slightly more than 12 thousand hectares, organic cultivation of durum wheat (6%); barley (3%) and rice (12%); sunflower (26%) and soya (15%); alfalfa (8%); tomatoes (21%) and legumes (13%) is still expanding. As regards permanent crops, they reached an overall amount of 480,459 hectares in 2019. Compared to 2018, the olive and vine upward trend, outlined before, and the overall stability of soft fruit and nuts are worth noting. While fruit of subtropical climate zones continues to make its way (in particular figs and kiwis, which grow by 102 and 652 hectares respectively), areas under citrus fruit are on the rise again, with an additional 3%, after 2018 fall. Finally, despite the drop (-3%) in fruit of temperate climate zones, apple and pear production grows significantly, and comes to cover now 8,235 and 2,788 hectares **(Table 2)**.

The geographical distribution indicates that, in 2019 again, there were still 4 regions which totalled 51% of the national organic farmland: Sicily (370,622 ha), Apulia (266,274 ha), Calabria (208,292 ha) and Emilia Romagna (166,525 ha). When comparing to 2018, a downward trend is observed in Sicily (-4%), while Apulia, Calabria and Emilia Romagna record an increase of 1%, 4% and 7%, respectively **(Table 3)**. Further significant improvements are reported from the Autonomous Province of Trento (31%), Veneto (25%) and Umbria (8%) **(Tables 3 and 4, Chart 2)**.

In 2019, there are more than 80,000 **organic operators** in Italy: approximately 1,600 new operators are included in the organic farming certification system, bringing the total number of registered businesses to **80,643** (+2% compared to 2018). Of these, **58,697** are exclusive producers (agricultural holdings) who record a slight decrease (-0.4%) compared to the previous year; **9,576** exclusive processors[1] bring an extra 3% to the segment; while producers/processors amount to **11,843**, namely a 14% increase; and finally, total importers come up to **527**, marking a 12% increase **(Table 5)**.

The Regions with the highest number of operators are Sicily (10,596), Calabria (10,576) and Apulia (9,380). Notwithstanding their leading position, the two regions with the highest number of operators see a percentage decrease in 2019 against 2018, while in some regions organic farming is growing significantly: this is true for Marche (+32%), Veneto (+13%), Latium (+8%) and Umbria (+6%) **(Table 6 and Chart 3)**. While Umbria confirms in 2019 its growth already started in 2018 (+8%), other regions e.g. Emilia Romagna (+2%), Lombardy (+3%) and

[1] Processors include exclusive or non-exclusive operators for marketing, packaging, labelling, refrigeration, storage, processing activities,

the Autonomous Province of Bolzano (+4%) maintain an upward trend already recorded in 2018.

The category of **importers** of organic products includes operators who are either exclusive importers or producers and/or processors at the same time. Import of organic products from third countries is regulated by Regulation (EC) No 834/07, Regulation (EC) No 889/08 and Regulation (EC) No 1235/08 and their subsequent amendments and additions. Details on this topic will be given later in the relevant section of this report.

As regards the importers' regional distribution **(Table 7 and Chart 4),** it is worth noting that import activities mainly concern Central-Northern Italy, with 68% of the operators located in 5 Regions in this area.

The share of organic farming on the national data (ISTAT SPA 2016) indicates that, in Italy, organic farming accounts for **15.8% of the national UAA**.

Surface data by geographical areas highlights that, in Italy, every 100 hectares of UAA are organic: 5.7 hectares in the North-West; 10.1 hectares in the North-East; 21.0 hectares in the Centre; 20.4 hectares in the South and 18.7 hectares in the Islands.

Organic farms in Italy represent **6.2% of total farms**. The North-East, the South and the Islands are not in line with this value, showing a maximum variation of +-0.5%, while the share reaches 4.8% in the North-West and 8.2% in the Centre of the country **(Table 8)**.

Data on the average farm size in 2019 indicate that the **average size of an organic farm** in Italy is **28.3 hectares**, as opposed to the national average of 11.0 hectares. Also in 2019, this figure is still high, due to the difference between the national share of organic areas (15.8%) and of organic farms (6.2%). Concerning the geographical areas, the greatest difference is expectedly found in the Centre and in the Islands, while there is more limited variability, even below the national average of 28.3, in the South, North-West and North-East of the country, where organic farms cover on average 24.6, 23.2 and 22.2 hectares respectively **(Chart 5)**.

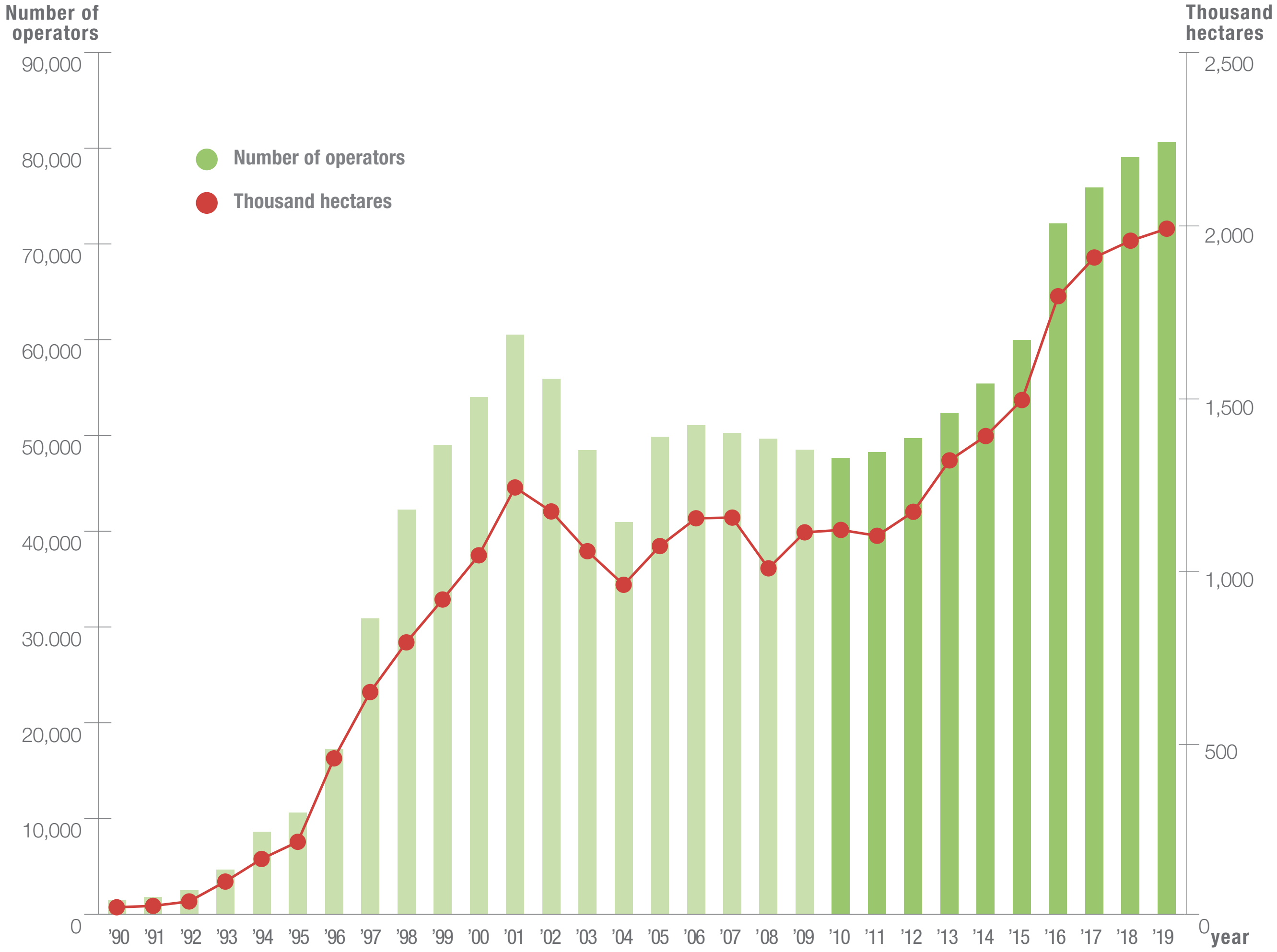
Organic aquaculture continued to develop in 2019: in fact, the number of operators in this sector has increased up to **59**, bringing an additional 11% to the industry compared to the previous year.

Concerning the geographical distribution, the Central-Northern Regions account for about 75% of the national operators, mainly in mussel and shellfish farming. The Central-Southern Regions, on the other hand, mostly rely on sea bass and sea bream farming **(Table 9)**.

As of 31 December 2019, in Italy **organic livestock** recorded a limited number increase, compared to 2018, only for cattle (+4%); instead, a drop of more than 10% is reported for pigs, sheep, goats and horses, leading to a total decrease of 7,858, 84,187, 10,637 and 2,716 heads, respectively. By contrast, in the same period, an upward trend is observed for poultry farming with a 14%, growth, which means almost 4 million heads. Finally, organic honey production is likely to expand thanks to a 10% increase in the number of hives, reaching 182,125 units **(Table 10)**.

The data reported above were compiled by SINAB - a MiPAAF project managed by ISMEA and CIHEAM BARI - based on communications as of 31 December 2019 by the Control Bodies, Regional Authorities, and the Organic Information System.

Chart 1
ORGANIC FARMING IN ITALY: AREAS (ha) AND OPERATORS (NUMBER)
1990 - 2019
HECTARES AND NUMBER



Source: compiled by SINAB based on data provided by MIPAAF

Table 1
AREAS AND CROPS UNDER ORGANIC FARMING IN ITALY
2018 AND 2019
HECTARES

	2018 Area in Italy	2019 Area in Italy			2019/2018
	Total organic	Under conversion	Converted	Total	% change
TOTAL	**1,958,045**	**383,130**	**1.610.106**	**1.993.236**	**1.8**
Cereals	326,083	62,109	268,175	330,284	1.3
Dried pulses and protein crops for grain production	50,477	7,869	39,653	47,523	-5.9
Root crops	2,696	885	2,819	3,704	37.4
Industrial crops	33,169	6,638	29,770	36,408	9.8
Plants harvested green	392,218	74,546	322,203	396,748	1.2
Other arable land crops	21,330	7,299	16,161	23,460	10.0
Vegetables*	61,155	11,768	53,315	65,082	6.4
Fruit**	36,917	9,722	27,352	37,074	0.4
Nuts	50,244	10,820	39,793	50,612	0.7
Citrus fruit	35,660	4,995	31,813	36,808	3.2
Vineyards	106,447	25,599	83,825	109,423	2.8
Olives	239,096	39,434	203,273	242,708	1.5
Other permanent crops	2,979	1,403	2,430	3,833	28.7
Permanent grassland (excl, rough grazing)	398,450	73,803	331,780	405,582	1.8
Rough grazing	141,562	31,181	114,311	145,491	2.8
Fallow land	59,562	15,060	43,433	58,493	-1.8
Other categories not included in the total***	295,730	81,588	214,070	295,659	0.0

**"Strawberries" and "cultivated mushrooms" are included in vegetables*
***Fruit includes "fruit of temperate climate zones", "fruit of sub-tropical climate zones", "berries" (soft fruit)*
****Not grazed forest and/or wild collection areas (mushrooms, truffles, wild berries) notified by the operator; other*

Source: compiled by SINAB based on data provided by Control Bodies

Table 2
ORGANIC AREAS BY MAIN CROP TYPES IN ITALY
2018 AND 2019
HECTARES

	2018 Area in Italy			2019 Area in Italy	2019/2018
	Total organic	Under conversion	Converted	Total organic	% change
CEREALS FOR GRAIN PRODUCTION (inc. seeds)	**326,083**	**62,109**	**268,175**	**330,284**	**1.3**
Durum wheat	132,519	25,177	115,952	141,129	6.5
Common wheat and spelt	62,535	9,275	48,558	57,833	-7.5
Rye	352	26	375	400	13.7
Barley	44,062	9,070	36,343	45,413	3.1
Oats	22,880	4,920	18,833	23,753	3.8
Grain maize	18,278	5,158	13,752	18,909	3.5
Triticale	3,991	825	3,421	4,247	6.4
Other cereals	23,634	4,114	14,499	18,613	-21.2
Rice	17,832	3,545	16,443	19,988	12.1
ROOT CROPS	**2,696**	**885**	**2,819**	**3,704**	**37.4**
Potatoes (incl, early and seed potatoes)	1,463	479	1,252	1,730	18.3
Sugar beet (excl, seeds)	432	95	925	1,020	135.9
Other root crops	801	311	643	954	19.1
INDUSTRIAL CROPS	**33,169**	**6,638**	**29,770**	**36,408**	**9.8**
Total Oil seeds	**25,581**	**5,137**	**23,599**	**28,736**	**12.3**
Sunflower	9,190	1,993	9,601	11,594	26.2
Soya	11,547	2,803	10,474	13,277	15.0
Rape and turnip rape	2,656	257	2,219	2,477	-6.8
Linseed	1,973	66	1,131	1,197	-39.4
Other oil seeds	215	18	174	192	-10.7
Tobacco	**130**	**61**	**100**	**160**	**23.5**
Hops	**13**	**7**	**9**	**17**	**26.1**
Total Textile crops	**391**	**116**	**508**	**624**	**59.7**
Cotton	0	0	0	0	-
Other textile crops	391	116	508	624	59.7
Aromatic plants, medicinal and culinary plants	**5,222**	**1,076**	**4,357**	**5,432**	**4.0**
Other industrial crops	**1,832**	**241**	**1,197**	**1,438**	**-21.5**

Table 2
ORGANIC AREAS BY MAIN CROP TYPES IN ITALY
2018 AND 2019
HECTARES

	2018 Area in Italy	2019 Area in Italy			2019/2018
	Total organic	Under conversion	Converted	Total organic	% change
PLANTS HARVESTED GREEN	**392,218**	**74,546**	**322,203**	**396,748**	**1.2**
Total annual plants harvested green	**83,184**	**15,202**	**58,600**	**73,802**	**-11.3**
Green maize	2,610	397	1,960	2,357	-9.7
Other annual plants harvested green	80,574	14,806	56,639	71,445	-11.3
Temporary grasses and grazings	**116,974**	**26,691**	**98,352**	**125,043**	**6.9**
Other plants harvested green	**192,060**	**32,652**	**165,251**	**197,903**	**3.0**
Lucerne (Alfalfa)	125,884	22,717	113,594	136,312	8.3
Other	66,176	9,935	51,656	61,591	-6.9
FRESH VEGETABLES, MELONS, STRAWBERRIES, CULTIVATED MUSHROOMS	**61,155**	**11,768**	**53,315**	**65,082**	**6.4**
All brassicas (excl. roots)	**6,566**	**1,134**	**5,607**	**6,741**	**2.7**
Cauliflower and broccoli	3,161	504	2,039	2,543	-19.6
Cabbage (white)	1,391	193	1,111	1,304	-6.3
Other brassicas	2,014	436	2,458	2,894	43.7
Leafy or stalk vegetables (excl, brassicas)	**11,084**	**2,394**	**8,157**	**10,551**	**-4.8**
Celery	90	10	82	93	2.3
Leeks	102	12	91	103	1.2
Lettuces	710	58	349	407	-42.7
Endives	411	145	178	323	-21.4
Spinach	1,134	271	859	1,130	-0.4
Asparagus	1,979	529	1,352	1,881	-4.9
Chicory	1,265	200	1,475	1,675	32.4
Artichokes	1,313	327	958	1,285	-2.1
Other leafy or stalk vegetables	4,079	842	2,812	3,654	-10.4
Vegetables cultivated for fruit	**11,278**	**2,609**	**10,224**	**12,833**	**13.8**
Tomatoes	6,998	1,784	6,651	8,434	20.5
Cucumbers	39	6	35	41	5.2
Gherkins	0	0	0	0	-
Melons	818	150	992	1,142	39.6
Watermelons	345	104	313	417	21.0
Other vegetables cultivated for fruit	3,079	566	2,233	2,799	-9.1

Table 2
ORGANIC AREAS BY MAIN CROP TYPES IN ITALY
2018 AND 2019
HECTARES

	2018 Area in Italy			2019 Area in Italy	2019/2018
	Total organic	Under conversion	Converted	Total organic	% change
Other vegetables cultivated for fruit	**2,729**	**467**	**2,373**	**2,840**	**4.1**
Carrots	1,021	75	867	943	-7.6
Garlic	339	31	332	363	7.1
Onions	807	260	834	1,094	35.6
Shallots	16	0	20	20	26.5
Other root tuber and bulb vegetables	546	101	319	420	-23.2
Legumes	**23,551**	**3,755**	**22,839**	**26,594**	**12.9**
Peas	5,972	1,358	5,735	7,093	18.8
Beans	1,767	312	1,461	1,773	0.3
Other legumes	15,812	2,085	15,643	17,728	12.1
Other vegetables	**5,523**	**1,310**	**3,893**	**5,203**	**-5.8**
Strawberries	**316**	**95**	**214**	**309**	**-2.2**
Cultivated mushrooms	**107**	**4**	**7**	**11**	**-89.7**
FRUIT*	**36,917**	**9,722**	**27,352**	**37,074**	**0.4**
Fruit of temperate climate zones	**27,326**	**7,195**	**19,303**	**26,498**	**-3.0**
Apples	7,400	2,879	5,356	8,235	11.3
Pears	2,471	648	2,140	2,788	12.8
Peaches	2,466	732	1,842	2,574	4.4
Apricots	3,335	732	2,626	3,358	0.7
Nectarines	333	54	257	311	-6.7
Cherries	4,395	1,031	3,155	4,186	-4.8
Plums	1,309	241	1,088	1,329	1.5
Other fruit of temperate climate zones	5,616	879	2,839	3,718	-33.8
Berries (soft fruit)	**570**	**168**	**425**	**592**	**3.8**
Blackcurrant	57	16	34	50	-10.8
Raspberries	137	24	101	125	-8.4
Other berries	377	128	289	417	10.5

**Fruit includes “fruit of temperate climate zones”, “fruit of sub-tropical climate zones”, “berries” (soft fruit)*

Table 2
ORGANIC AREAS BY MAIN CROP TYPES IN ITALY
2018 AND 2019
HECTARES

	2018 Area in Italy			2019 Area in Italy	2019/2018
	Total organic	Under conversion	Converted	Total organic	% change
Fruit of sub-tropical climate zones	**9,020**	**2,359**	**7,625**	**9,984**	**10.7**
Figs	653	247	509	756	15.7
Kiwis	5,958	1,513	5,097	6,610	10.9
Avocado	69	25	67	92	33.2
Bananas	0	2	0	2	-
Other Fruit of sub-tropical climate zones	2,340	572	1,952	2,524	7.9
NUTS	**50,244**	**10,820**	**39,793**	**50,612**	**0.7**
Walnuts	1,580	418	1,228	1,646	4.2
Hazel nuts	13,484	3,383	10,335	13,717	1.7
Almonds	17,345	3,384	14,245	17,629	1.6
Chestnuts	16,990	3,476	13,301	16,777	-1.3
Other nuts	845	159	684	842	-0.3
CITRUS FRUIT	**35,660**	**4,995**	**31,813**	**36,808**	**3.2**
Pomelos and grapefruit	154	10	169	178	16.0
Lemons and acid limes	6,841	1,149	5,881	7,030	2.8
Oranges	18,626	2,301	16,871	19,172	2.9
Other citrus fruit (small citrus fruit)	10,039	1,536	8,892	10,428	3.9
VINEYARDS	**106,447**	**25,599**	**83,825**	**109,423**	**2.8**
Wine grape vineyards	104,221	25,119	82,023	107,143	2.8
Table grape vineyards	2,226	479	1,801	2,281	2.4
Vineyards for raisin production	0	0	0	0	-
OLIVES	**239,096**	**39,434**	**203,273**	**242,708**	**1.5**
Table olives	967	118	1,149	1,266	30.9
Oil olives	238,129	39,317	202,125	241,441	1.4

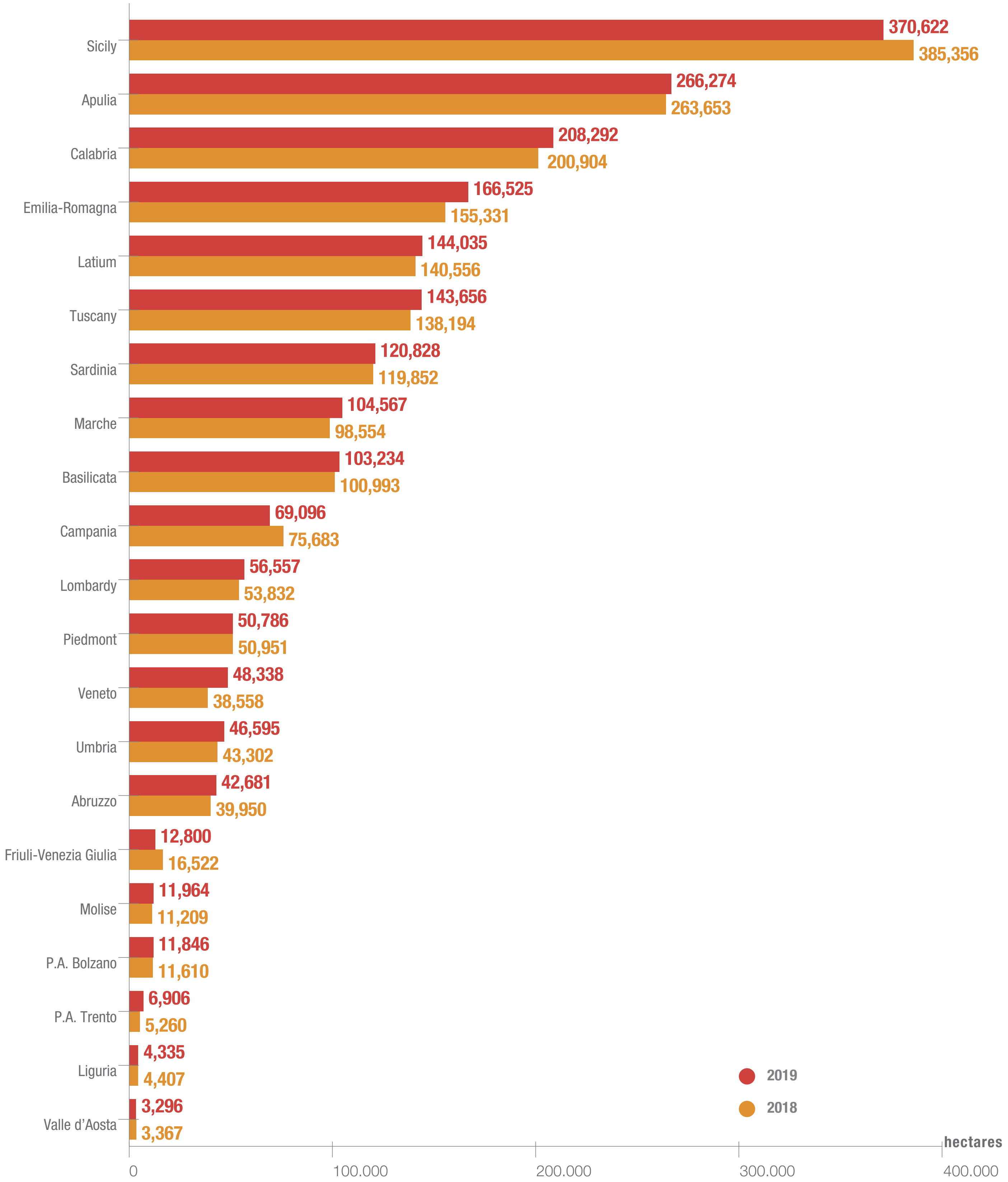
Source: compiled by SINAB based on data provided by Control Bodies

Table 3
REGIONAL DISTRIBUTION OF ORGANIC AREAS IN ITALY
2018 AND 2019
HECTARES

	Organic area		% change
	2018	2019	2019/2018
ITALY'S TOTAL	**1,958,045**	**1,993,236**	**1.8**
Abruzzo	39,950	42,681	6.8
Apulia	263,653	266,274	1.0
Basilicata	100,993	103,234	2.2
Calabria	200,904	208,292	3.7
Campania	75,683	69,096	-8.7
Emilia-Romagna	155,331	166,525	7.2
Friuli-Venezia Giulia	16,522	12,800	-22.5
Latium	140,556	144,035	2.5
Liguria	4,407	4,335	-1.6
Lombardy	53,832	56,557	5.1
Marche	98,554	104,567	6.1
Molise	11,209	11,964	6.7
P.A. Bolzano	11,610	11,846	2.0
P.A. Trento	5,260	6,906	31.3
Piedmont	50,951	50,786	-0.3
Sardinia	119,852	120,828	0.8
Sicily	385,356	370,622	-3.8
Tuscany	138,194	143,656	4.0
Umbria	43,302	46,595	7.6
Valle d'Aosta	3,367	3,296	-2.1
Veneto	38,558	48,338	25.4

Source: compiled by SINAB based on data provided by Control Bodies

Chart 2
REGIONAL DISTRIBUTION OF ORGANIC AREAS IN ITALY
2018 AND 2019
HECTARES



Source: compiled by SINAB based on data provided by Control Bodies

Infographic 1
REGIONAL DISTRIBUTION OF ORGANIC AREAS IN ITALY
2019
HECTARES

Source: compiled by SINAB based on data provided by Control Bodies

Table 4
REGIONAL DISTRIBUTION OF ORGANIC AREAS BY MAIN CROP TYPES IN ITALY
2019
HECTARES

	Cereals	Protein crops*	Root crops	Industrial crops	Plants harvested green	Other arable land crops	Vegetables **	Fruit ***	Nuts	Citrus fruit	Vineyards	Olives	Total crops
ITALY	**330,284**	**47,523**	**3,704**	**36,408**	**396,748**	**23,460**	**65,082**	**37,074**	**50,612**	**36,808**	**109,423**	**242,708**	**1,993,236**
Abruzzo	4,604	423	229	335	9,566	187	1,242	225	97	65	4,546	3,603	42,681
Apulia	59,639	10,523	113	2,837	28,799	4,322	15,045	6,571	7,861	1,944	16,952	73,200	266,274
Basilicata	37,127	9,058	8	1,395	17,239	202	3,838	1,625	433	998	930	5,468	103,234
Calabria	11,951	1,559	344	340	35,822	2,273	1,821	3,293	3,025	11,733	3,983	71,007	208,292
Campania	8,415	1,837	91	537	11,076	625	3,382	2,547	8,683	168	2,191	9,647	69,096
Emilia-Romagna	31,310	1,473	760	4,893	64,973	1,610	8,022	3,130	1,636	42	5,158	1,118	166,525
Friuli-Venezia Giulia	1,718	93	23	1,131	2,370	11	254	322	48	0	1,600	58	12,800
Latium	17,542	1,697	168	1,298	38,134	612	6,337	2,823	8,777	16	2,293	8,928	144,035
Liguria	85	0	6	108	110	4	71	25	64	1	54	400	4,335
Lombardy	25,077	368	90	3,375	12,623	82	2,783	691	86	3	4,055	292	56,557
Marche	18,861	3,732	387	4,392	30,837	1,873	2,887	549	507	3	5,885	2,956	104,567
Molise	3,203	585	23	697	2,726	53	1,158	256	193	2	511	1,068	11,964
P.A. Bolzano	160	6	37	29	114	3	61	2,725	22	0	416	5	11,846
P.A. Trento	50	0	38	31	60	31	111	1,106	55	0	1,259	92	6,906
Piedmont	10,614	719	227	2,562	6,221	167	1,776	2,856	3,221	10	3,945	60	50,786
Sardinia	6,253	195	105	243	16,418	5,539	771	297	165	90	1,608	3,615	120,828
Sicily	50,828	11,970	137	911	61,589	2,544	6,317	3,542	13,638	21,660	30,084	38,584	370,622
Tuscany	24,414	2,364	269	3,136	43,074	2,774	5,506	1,219	1,261	41	14,857	16,036	143,656
Umbria	6,340	386	67	1,337	8,561	222	1,842	139	668	29	1,085	6,151	46,595
Valle d'Aosta	6	0	3	1	554	0	4	6	2	0	21	0	3,296
Veneto	12,086	533	578	6,821	5,883	326	1,854	3,126	173	0	7,990	419	48,338

**Dried pulses and protein crops for grain production*
***Fresh vegetables, melons, strawberries, cultivated mushrooms*
****Fruit includes "fruit of temperate climate zones", "fruit of sub-tropical climate zones", "berries" (soft fruit)*

Source: compiled by SINAB based on data provided by Control Bodies

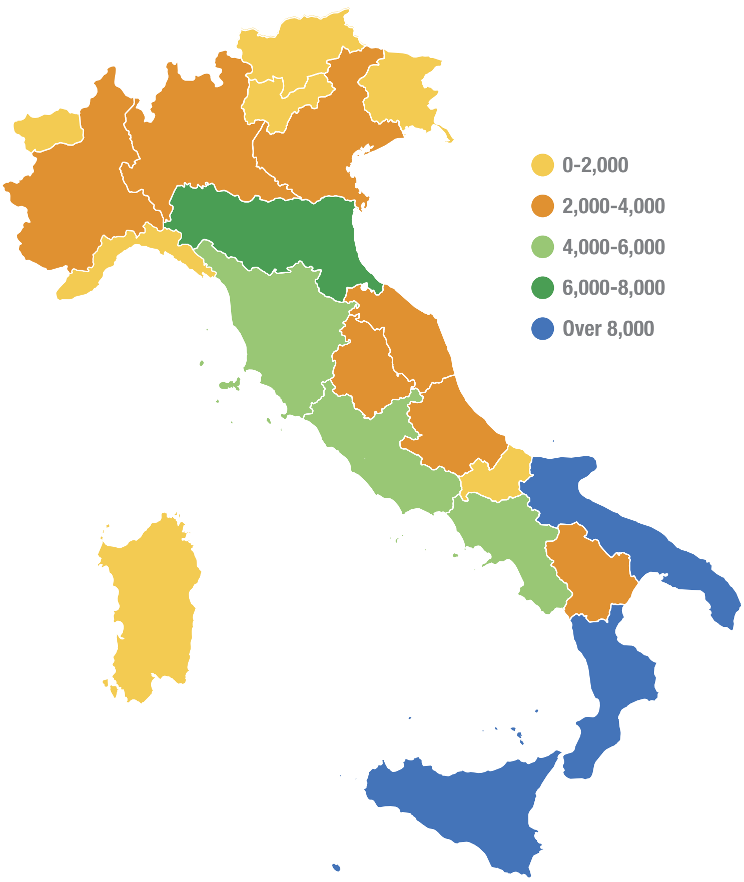
Table 5
ORGANIC OPERATORS BY CATEGORY
2018 AND 2019
NUMBER

	Organic operators		% change
	2018	2019	2019/2018
TOTAL	**79,046**	**80,643**	**2.0**
Exclusive producers	58,954	58,697	-0.4
Exclusive processors	9,257	9,576	3.4
Producers/Processors	10,363	11,843	14.3
Importers*	472	527	11.7

** "Importers" include exclusive importers and importers who also carry out production and processing activities*

Source: compiled by SINAB based on data provided by Control Bodies, Regional Authorities, and SIB

Infographic 2
TOTAL ORGANIC OPERATORS
2019
NUMBER



Source: compiled by SINAB based on data provided by Control Bodies, Regional Authorities and SIB

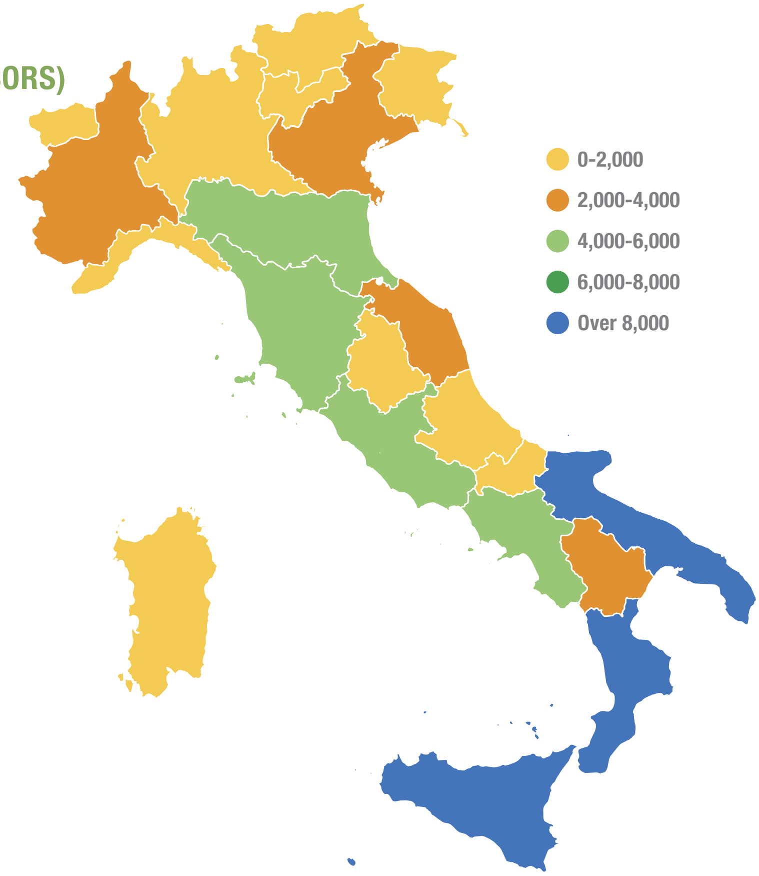
Table 6
REGIONAL DISTRIBUTION OF ORGANIC OPERATORS BY CATEGORY IN ITALY
2018 AND 2019
NUMBER

	No operators 2018	No operators 2019					2019/2018
	Total	Exclusive producers	Producers/ Processors	Exclusive processors	Importers*	Total	% change
ITALY	**79,046**	**58,697**	**11,843**	**9,576**	**527**	**80,643**	**2.0**
Abruzzo	1,990	1,386	341	279	3	2,009	1.0
Apulia**	9,275	7,227	1,304	834	15	9,380	1.1
Basilicata	2,271	2,136	116	107	0	2,359	3.9
Calabria	11,030	8,606	1,615	350	5	10,576	-4.1
Campania	6,042	4,931	377	579	31	5,918	-2.1
Emilia-Romagna**	5,920	4,190	678	1,073	86	6,027	1.8
Friuli-Venezia Giulia	1,002	576	147	190	7	920	-8.2
Latium	4,746	4,043	562	504	13	5,122	7.9
Liguria	496	253	82	164	20	519	4.6
Lombardy	3,144	1,500	498	1,133	107	3,238	3.0
Marche**	2,967	3,126	499	283	10	3,918	32.1
Molise	504	378	61	75	2	516	2.4
P.A. Bolzano	1,684	1,302	129	313	15	1,759	4.5
P.A. Trento	1,290	977	178	146	3	1,304	1.1
Piedmont**	3,135	1,939	599	577	65	3,180	1.4
Sardinia	1,991	1,598	161	125	3	1,887	-5.2
Sicily	10,736	7,951	1,668	950	27	10,596	-1.3
Tuscany	5,235	2,730	1,829	672	40	5,271	0.7
Umbria**	1,971	1,494	379	199	11	2,083	5.7
Valle d'Aosta	93	60	15	15	0	90	-3.2
Veneto**	3,524	2,294	605	1,008	64	3,971	12.7

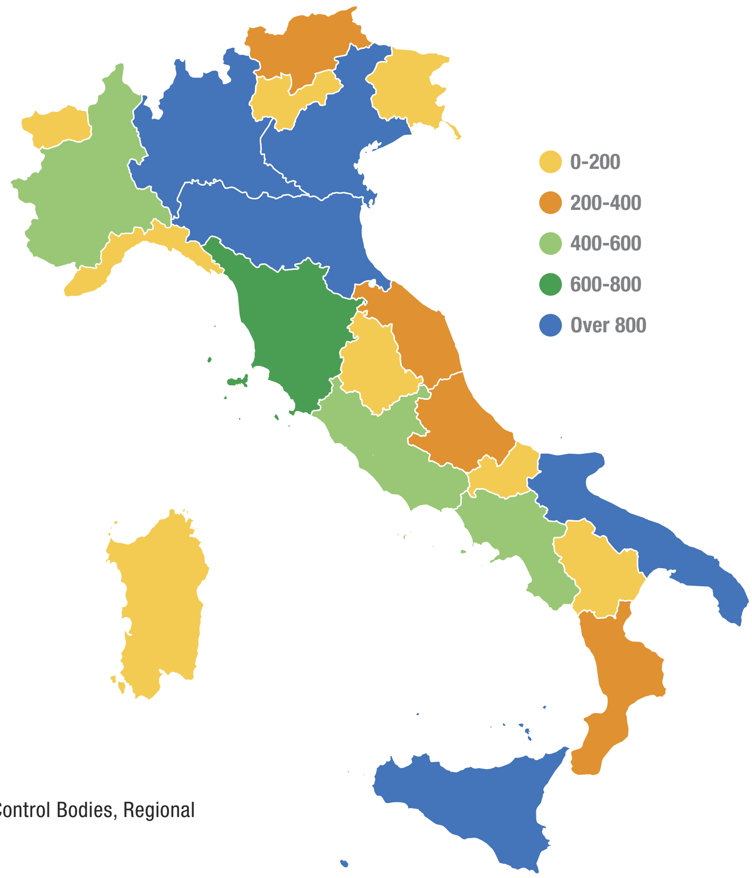
** "Importers" include exclusive importers and importers who also carry out production and processing activities*
***Data are provided by the Regional Authorities*

Source: compiled by SINAB based on data provided by Control Bodies, Regional Authorities and SIB

Infographic 3
ORGANIC FARMS
(INCLUDING PRODUCERS/PROCESSORS)
2019
NUMBER

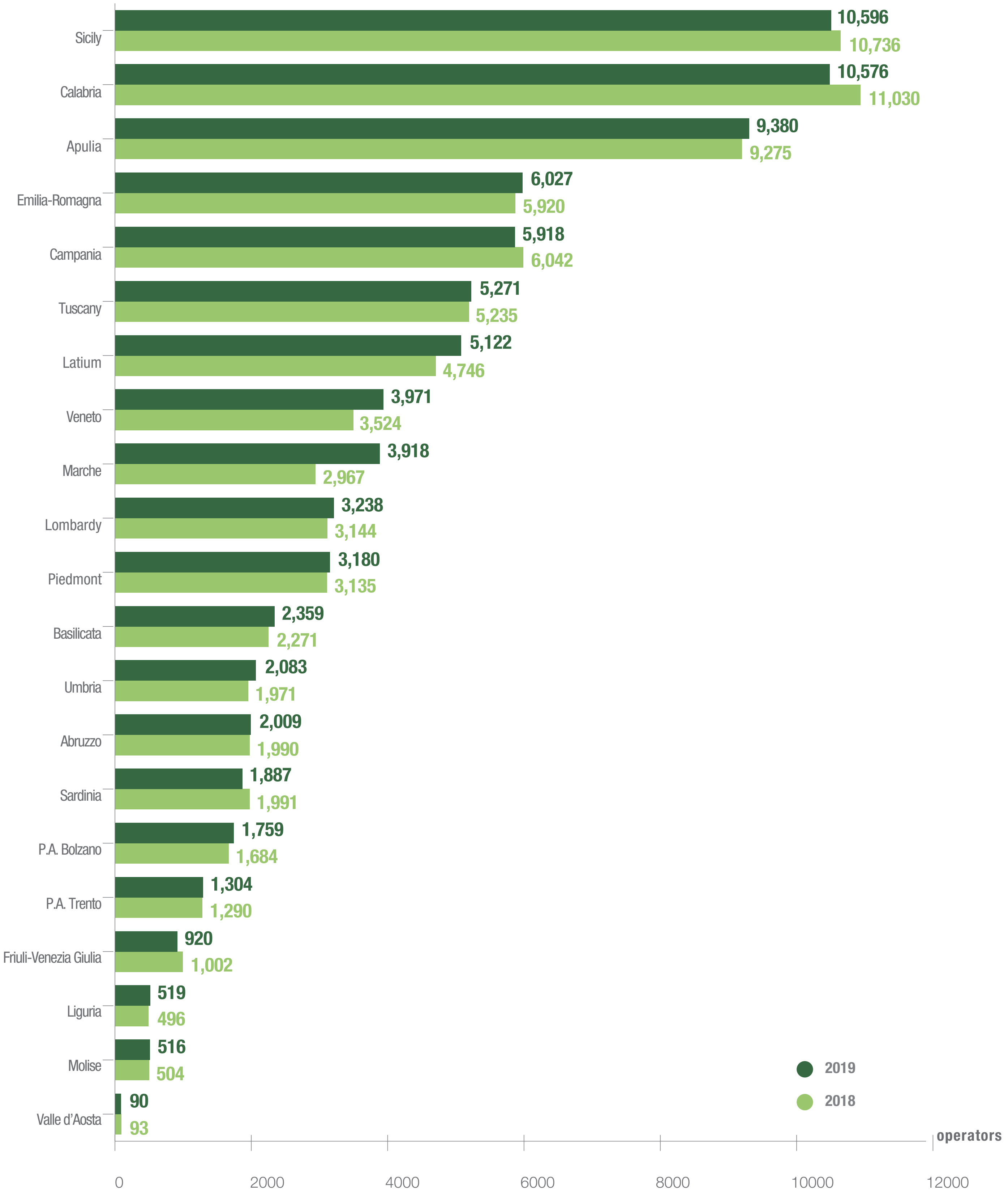


Infographic 4
ORGANIC EXCLUSIVE PROCESSORS
2019
NUMBER



Source: compiled by SINAB based on data provided by Control Bodies, Regional Authorities, and SIB

Chart 3
REGIONAL DISTRIBUTION OF ORGANIC OPERATORS IN ITALY
2018 AND 2019
NUMBER



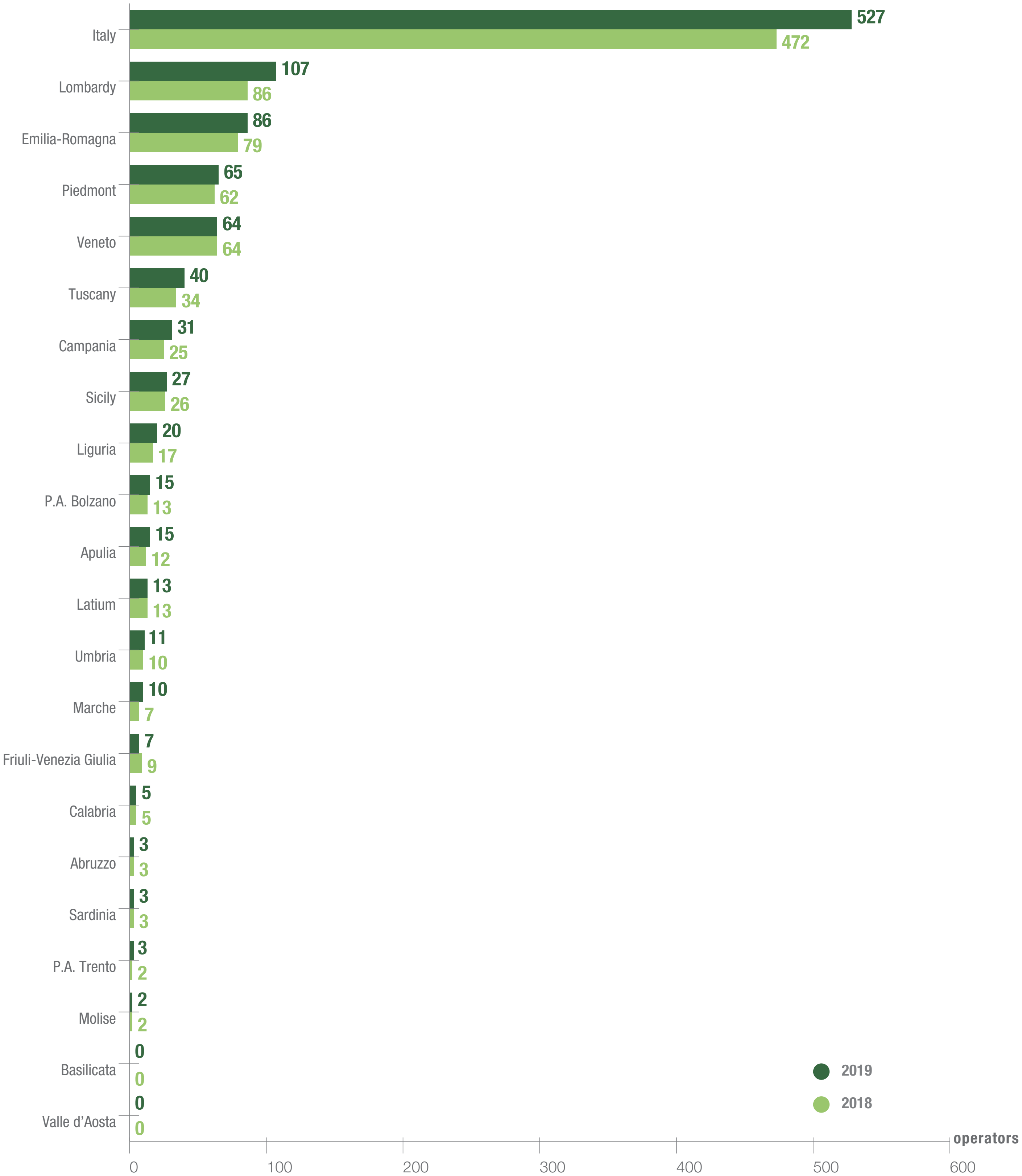
Source: compiled by SINAB based on data provided by Control Bodies, Regional Authorities, and SIB

Table 7
REGIONAL DISTRIBUTION OF ORGANIC IMPORTERS BY CATEGORY IN ITALY
2018 AND 2019
NUMBER

	No importers 2018				No importers 2019		2019/2018
	Total	Exclusive importers	Producers/ Importers	Producers/ Processors	Producers/ Processors/ Importers	Total	% change
ITALY	**472**	**4**	**2**	**502**	**19**	**527**	**11.7**
Abruzzo	3	0	0	3	0	3	-
Apulia	12	0	0	14	1	15	25.0
Basilicata	0	0	0	0	0	0	-
Calabria	5	0	0	4	1	5	-
Campania	25	0	0	29	2	31	24.0
Emilia-Romagna	79	2	0	80	4	86	8.9
Friuli-Venezia Giulia	9	1	0	6	0	7	-22.2
Latium	13	1	0	12	0	13	-
Liguria	17	0	1	19	0	20	17.6
Lombardy	86	0	0	105	2	107	24.4
Marche	7	0	0	9	1	10	42.9
Molise	2	0	0	2	0	2	-
P.A. Bolzano	13	0	0	15	0	15	15.4
P.A. Trento	2	0	0	3	0	3	50.0
Piedmont	62	0	0	62	3	65	4.8
Sardinia	3	0	0	3	0	3	-
Sicily	26	0	0	25	2	27	3.8
Tuscany	34	0	0	39	1	40	17.6
Umbria	10	0	0	11	0	11	10.0
Valle d'Aosta	0	0	0	0	0	0	-
Veneto	64	0	1	61	2	64	-

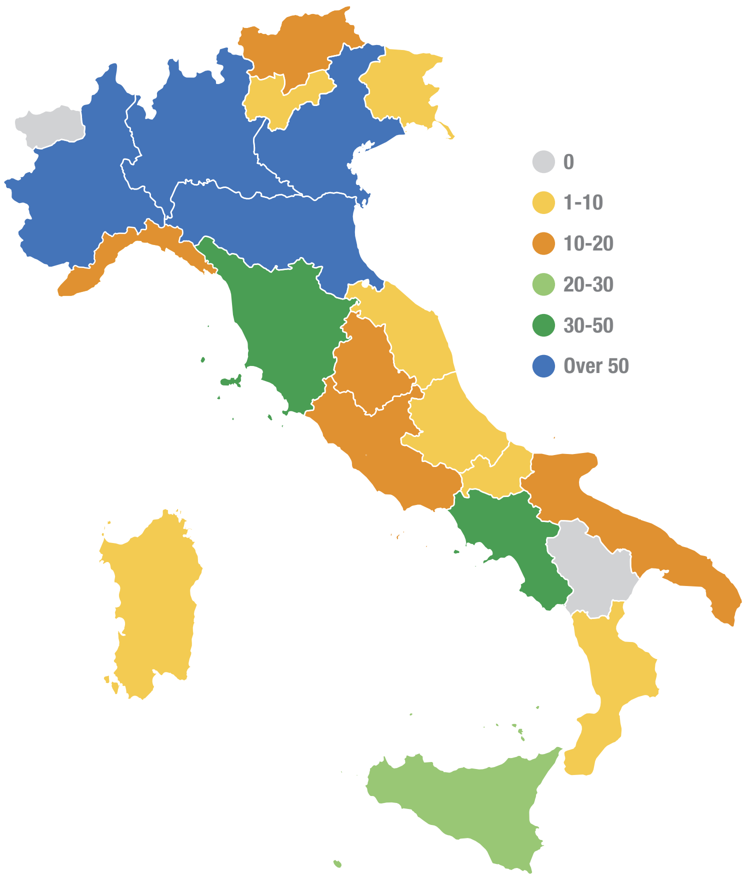
Source: compiled by SINAB based on data provided by SIB

Chart 4
REGIONAL DISTRIBUTION OF ORGANIC IMPORTERS IN ITALY
2018 AND 2019
NUMBER



Source: compiled by SINAB based on data provided by SIB

Infographic 5
ORGANIC IMPORTERS IN ITALY
2019
NUMBER



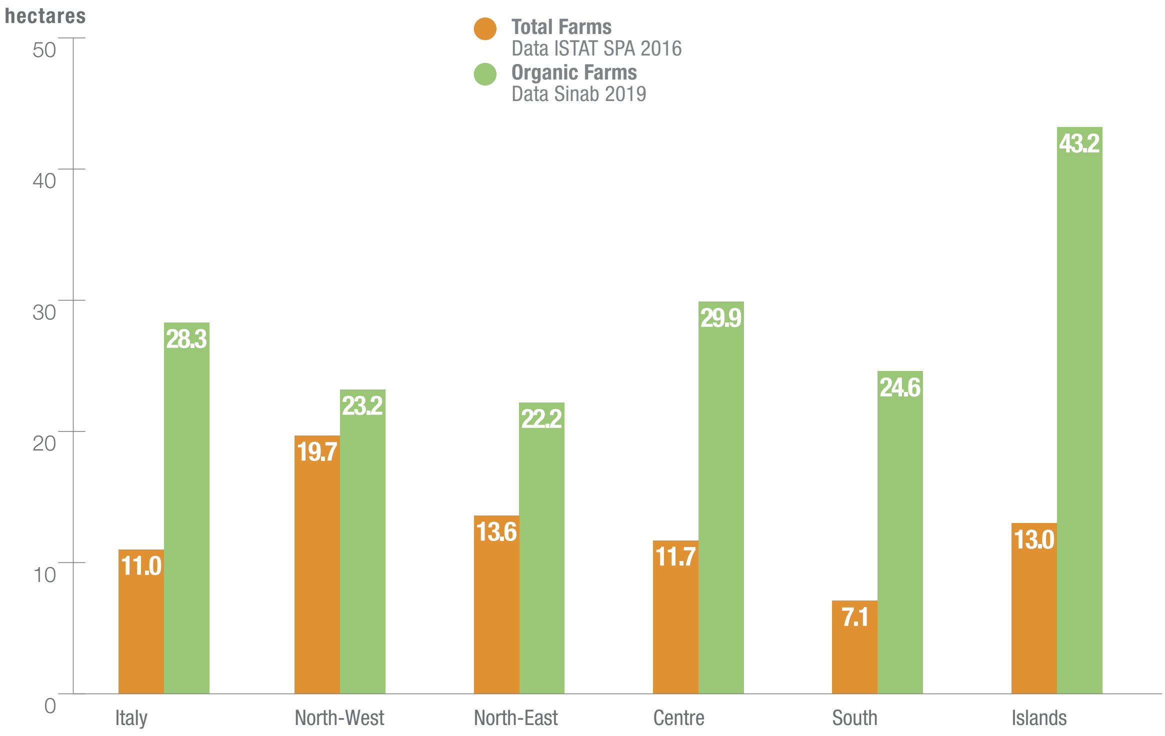
Source: compiled by SINAB based on data provided by SIB

Table 8
ORGANIC FARMING IN ITALY
SHARE OF AREAS AND OF FARMS BY GEOGRAPHICAL AREA ON NATIONAL TOTAL
(ISTAT SPA 2016)
2019
% SHARE

	Share of organic areas %	Share of organic farms %
ITALY	**15.8**	**6.2**
North	**8.1**	**5.7**
North-West	**5.7**	**4.8**
Piedmont	5.3	5.1
Valle d'Aosta	6.2	3.2
Liguria	11.2	3.8
Lombardy	5.9	4.9
North-East	**10.1**	**6.2**
P.A. Bolzano	5.7	8.9
P.A. Trento	5.4	13.1
Veneto	6.2	3.9
Friuli-Venezia Giulia	5.5	3.9
Emilia-Romagna	15.4	8.2
Centre	**21.0**	**8.2**
Tuscany	21.7	10.1
Umbria	13.9	6.5
Marche	22.2	9.9
Latium	23.2	6.7
South	**20.4**	**5.9**
Abruzzo	11.4	4.0
Apulia	20.7	4.4
Molise	6.2	2.1
Campania	13.1	6.1
Basilicata	21.0	5.8
Calabria	36.4	10.3
Islands	**18.7**	**5.6**
Sicily	25.8	6.3
Sardinia	10.2	3.6

Source: compiled by SINAB based on data provided by Control Bodies. Regional Authorities. and ISTAT SPA 2016

Chart 5
ORGANIC FARMING IN ITALY
AVERAGE FARM SIZE BY GEOGRAPHICAL AREA
2019
HECTARES



Source: compiled by SINAB based on data provided by Control Bodies, Regional Authorities, and ISTAT SPA 2016

Table 9
ORGANIC AQUACULTURE FARMS IN ITALY
2018 AND 2019
NUMBER

	2018	2019
ITALY	**53**	**59**
Abruzzo	0	1
Apulia	5	6
Basilicata	0	0
Calabria	1	1
Campania	0	0
Emilia-Romagna	22	23
Friuli-Venezia Giulia	1	1
Latium	0	0
Liguria	1	1
Lombardy	0	2
Marche	1	0
Molise	0	0
Piedmont	0	0
Trentino Alto Adige	1	1
Sardinia	1	1
Sicily	1	1
Umbria	0	0
Valle d'Aosta	0	0
Veneto	19	21

Source: compiled by SINAB based on data provided by SIB

Table 10
ORGANIC ANIMAL HUSBANDRY IN ITALY
2016-2019
NUMBER OF LIVE ANIMALS

	2016	2017	2018	2019	2019/2018 % change
Bovine animals	331,431	336,278	375,414	**389,665**	3.8
Porcine animals	56,567	61,242	59,623	**51,765**	-13.2
Ovine animals	776,454	736,502	680,369	**596,182**	-12.4
Caprine animals	113,983	115,590	110,055	**99,418**	-9.7
Poultry	4,636,012	3,027,604	3,482,435	**3,952,998**	13.5
Equine animals	15,691	15,293	12,982	**10,266**	-20.9
Bees*	170,343	171,094	164,824	**182,125**	10.5

**No of apiaries*

Source: compiled by SINAB based on data provided by Control Bodies

MARKET AND CONSUMPTION

FIGURES ON ORGANIC FARMING

Data
ISMEA
Istituto di Servizi per il Mercato Agricolo Alimentare

Source
ISMEA and Nielsen

Compiled by
ISMEA
Antonella Giuliano
Riccardo Meo
Marilena Perrone

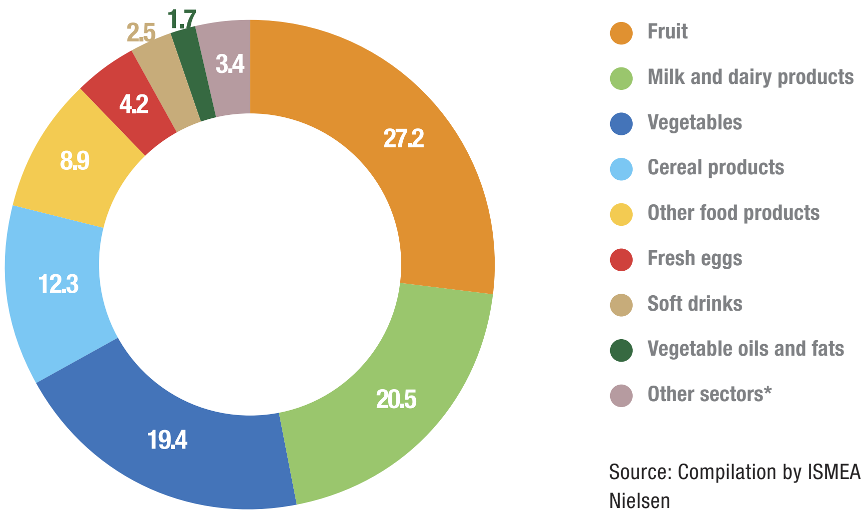
ORGANICS IN THE FOOD DEPARTMENT

Main categories of organic spending

In Italy, consumption of organic food products has grown by **4.4%** to over **3.3 billion euros** in the last year (figures for the first half of 2020). The value of the Italian organic market will eventually be defined after estimating the consumption of the Ho.Re.Ca sector, canteens and exports.
The overall impact of organic farming sales on Italian food spending equals 4% **(Chart 8)**.
In 2020, 90% of Italian consumers have bought an organic food product more than three times (+1.4% compared to 2019); this value rises up to 97% if we consider families that have done so at least once.
Ismea Nielsen data show an increase both for packaged FMCG products, which received more attention in the first weeks of the COVID-19 emergency, and for fresh bulk products.
Bulk organic fruit, vegetables, milk and dairy products are increasingly present in specific equipped sections of supermarkets and are reversing the negative trend that characterized them last year (+3.0%).
Overall, Italian agri-food consumption has been less impacted by the restrictions imposed by the lockdown than the other manufacturing sectors, despite the sensitive economic situation with an estimated -8.3%[2] drop in Italian GDP in 2020. Against this background, the organic sector continues to show interesting results, particularly in the Modern Retail Trade (**+5.7%**).

[2]Le prospettive per l'economia italiana nel 2020-2021, ISTAT
(Prospects for the Italian economy in 2020-2021, ISTAT)

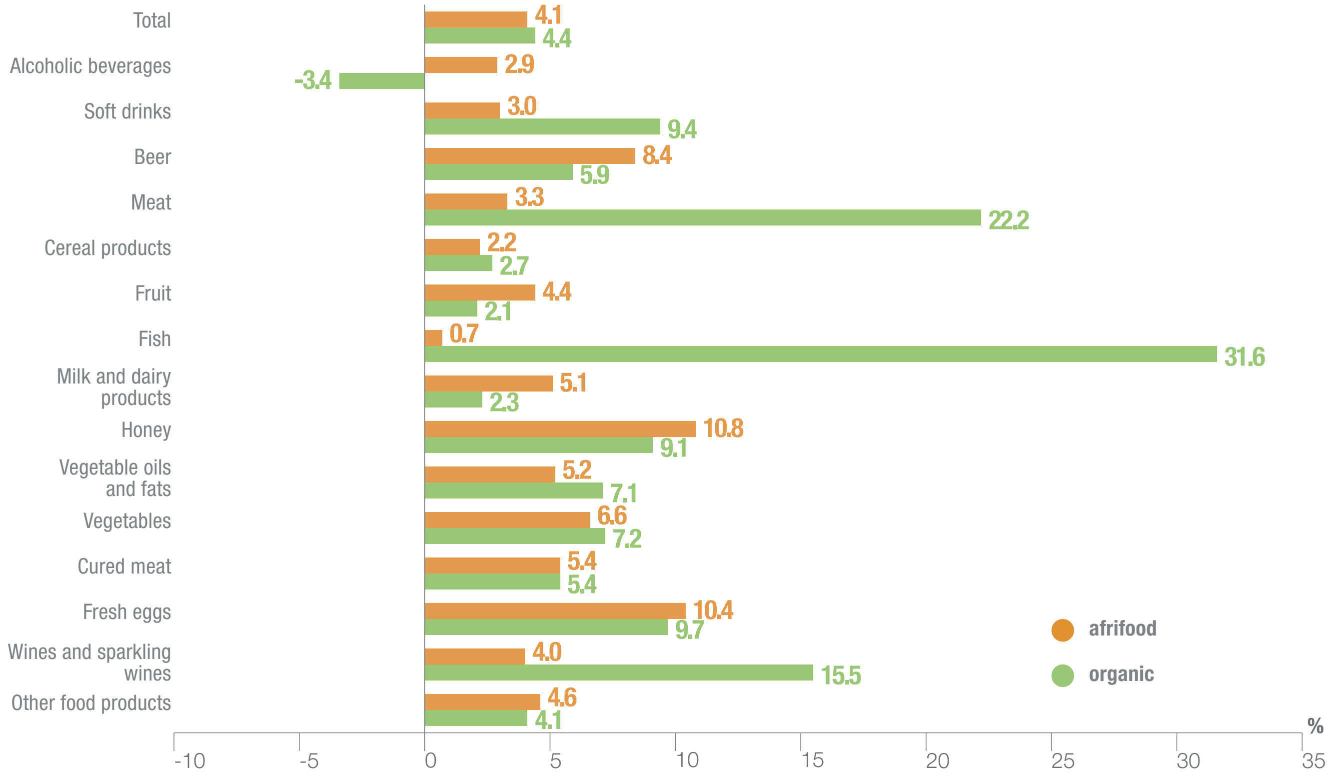
Chart 6
BREAKDOWN OF ORGANIC SPENDING BY SECTOR
2020
% INCIDENCE



**Other sectors include: meat, fish, honey, cured meat, beer, wines and sparkling wines, and other alcoholic beverages.*

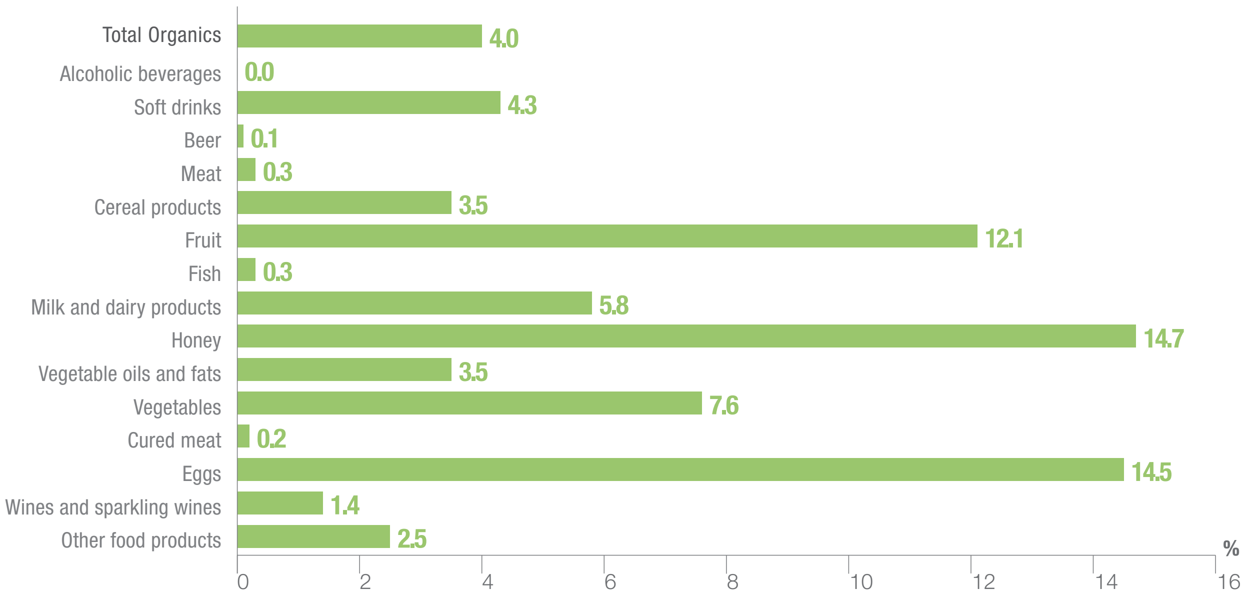
Source: Compilation by ISMEA based on data provided by Nielsen

Chart 7
ORGANIC SPENDING TREND AND COMPARISON WITH AGRIFOOD PRODUCTS
2020/2019
% CHANGE



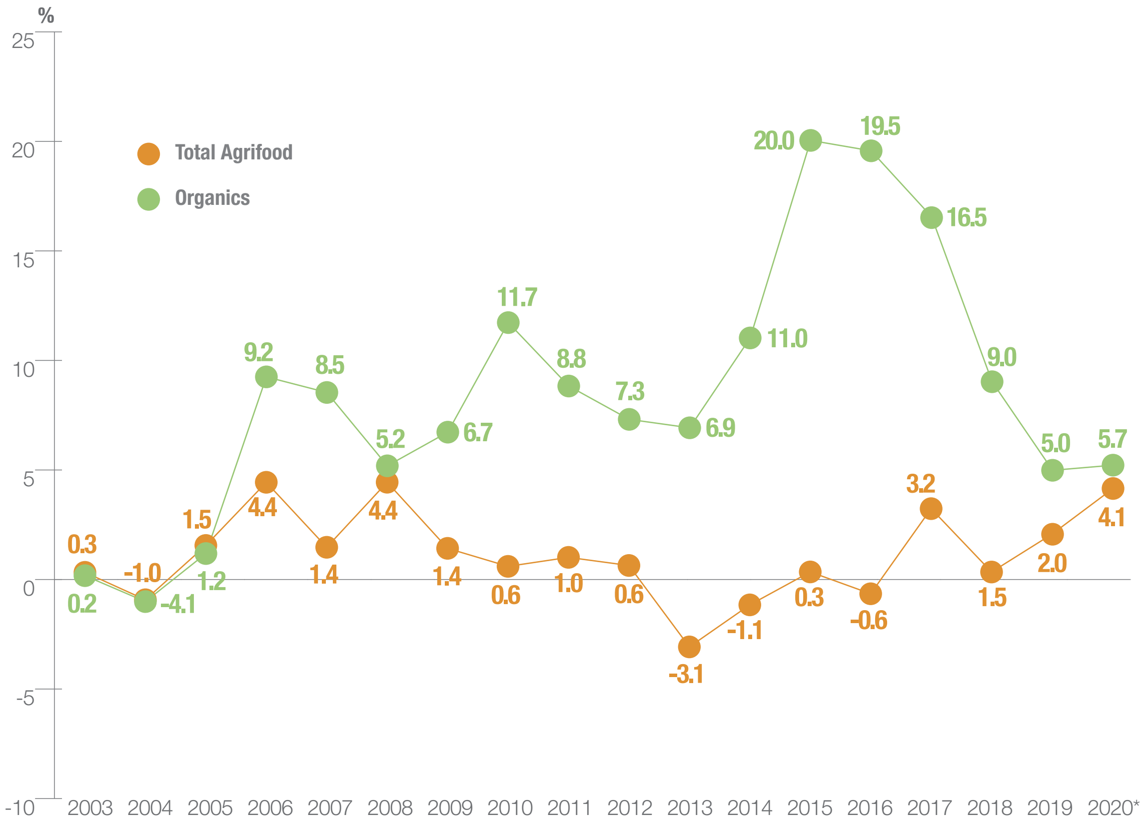
Source: Compilation by ISMEA based on data provided by Nielsen

Chart 8
INCIDENCE OF ORGANIC SPENDING ON TOTAL AGRI-FOOD PRODUCTS
2020
% INCIDENCE



Source: Compilation by ISMEA based on data provided by Nielsen

Chart 9
TIME SERIES OF ORGANIC CONSUMPTION IN LARGE-SCALE RETAIL TRADE COMPARED TO TOTAL AGRI-FOOD TREND
2020
% CHANGE



**Year ending June 14, 2020*

Source: Compilation by ISMEA based on data provided by Nielsen and ISMEA-GFK Eurisko Panel

Geographical distribution of spending in the large-scale retail trade

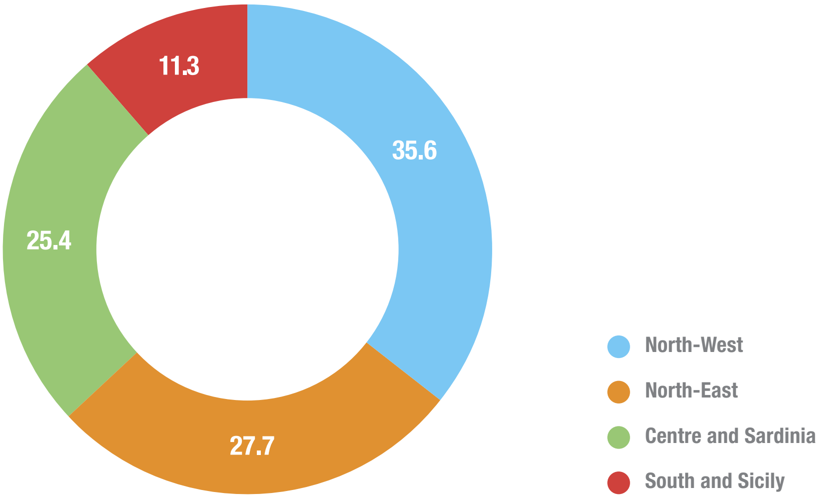
Estimates for organic consumption over the past year show growth across the entire peninsula although, once again, at different pace: while in the North-East, consumption of organic products has grown by +7.2% compared to the same period in the previous year, in the other regions of the country there have been lower increases, especially in the South (in Sicily, spending has grown by only +1.4%). However, it is worth bearing in mind that in Southern Italy, large-scale retail trade is not always the main purchase channel for organic food. In fact, as shown by the analysis of the Nielsen consumer panel, purchases in independent shops, small retailers and local markets are more widespread: 77.5% of the estimated organic spending in the South goes through the traditional channel, while in the North the incidence is below 30%.

Chart 10

DISTRIBUTION OF ORGANIC SALES IN LARGE-SCALE RETAIL TRADE BY GEOGRAPHICAL AREA

2020

% INCIDENCE



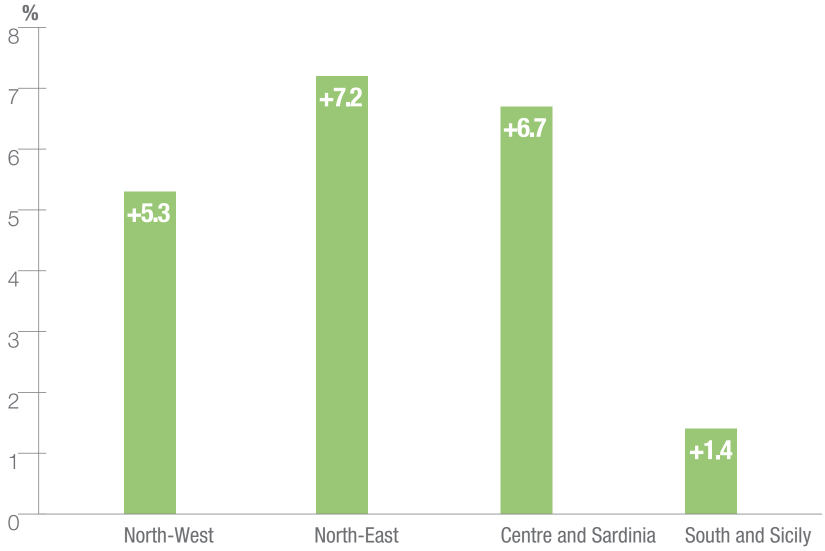
Source: Compilation of ISMEA based on Nielsen data

Chart 11

GEOGRAPHICAL DISTRIBUTION AND ORGANIC SPENDING TREND FOR FIXED-WEIGHT PRODUCTS IN LARGE-SCALE RETAIL TRADE

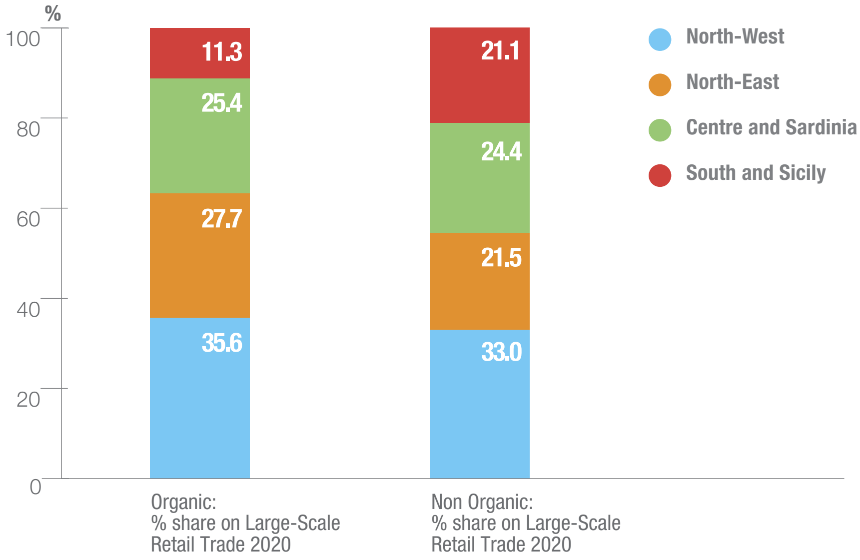
2020/2019

% CHANGE



Source: Compilation by ISMEA based on data provided by Nielsen

Chart 12
GEOGRAPHICAL DISTRIBUTION OF ORGANIC SALES IN LARGE-SCALE RETAIL TRADE AND COMPARISON WITH AGRI-FOOD PRODUCTS
2020
% INCIDENCE



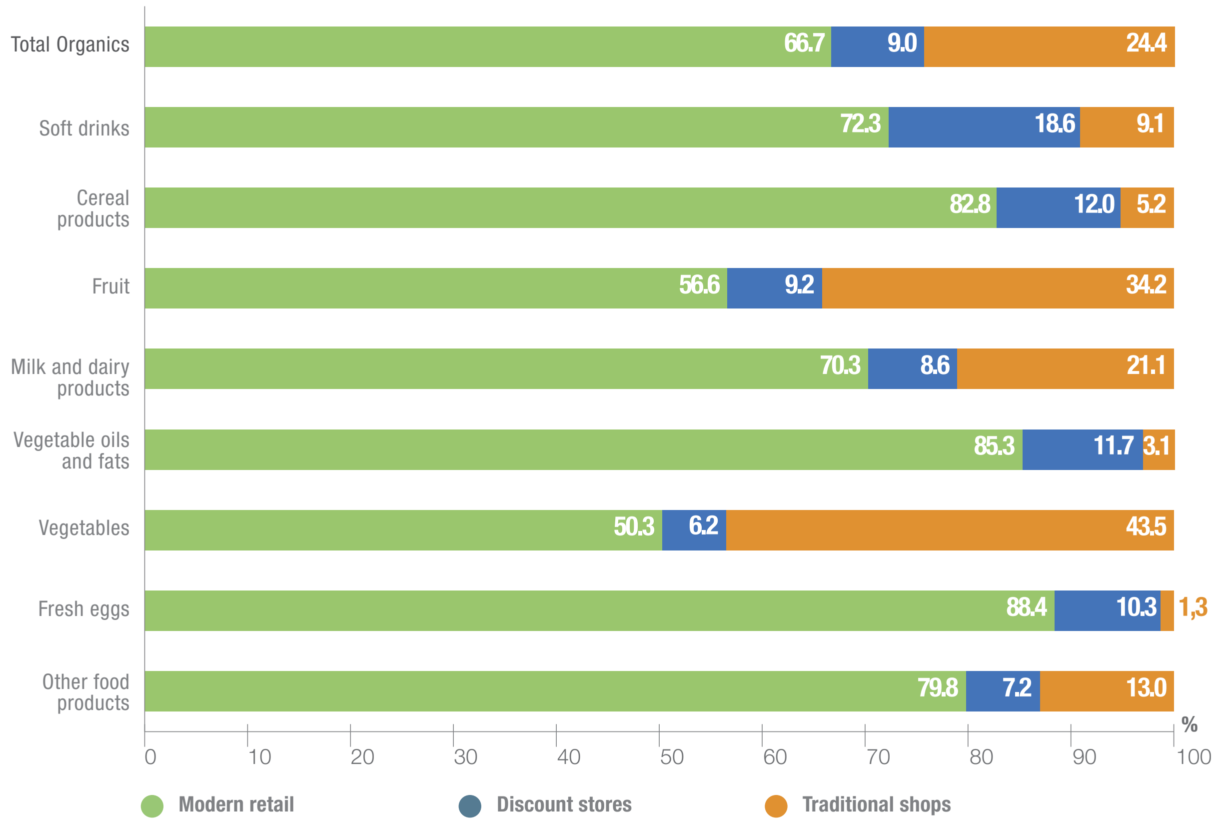
Source: Compilation by ISMEA based on data provided by Nielsen

Sales channels

Sales are driven by **large-scale retail** trade with a **5.7%** turnover increase compared to the same period in the previous year **(Chart 14)**. In this case, an increase in the quantity of product marketed in most sectors has been recorded **(Chart 13)**. Discount stores also grew by +10.7% in the first few months of 2020 even though turnovers are still marginal when compared to the other organic sales channels (9.0% of organic spending passes through **Discount stores**).

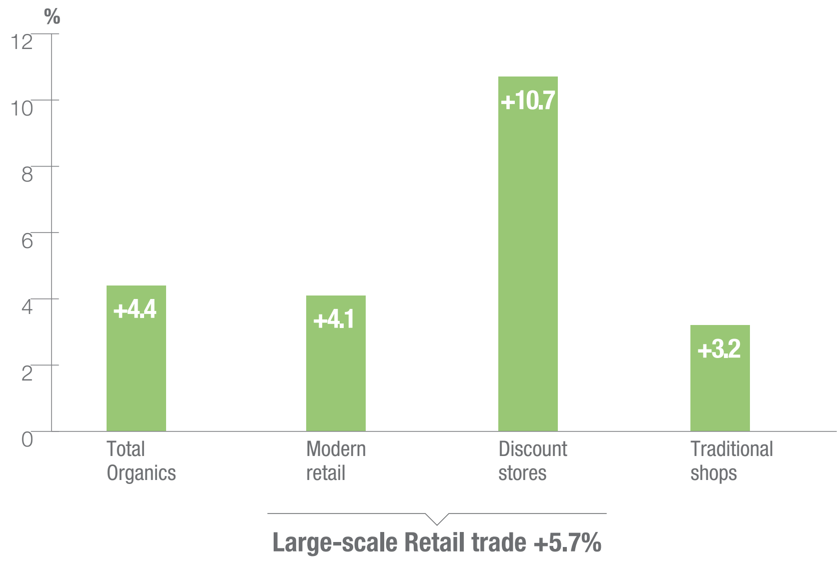
This year's data also show a reversal of the trend for **Traditional Shops** which show a turnover growth of **3.2%** after a few years of stagnation.
Finally, the beginning of the year rewards once again the large-scale retail trade in terms of turnover and volumes of organic products sold. Supermarkets and hyper-markets reap the benefits of investments and a change in commercial strategy that began a few years ago, providing, for instance, more and more room for fresh, unpackaged products that are highly appreciated by Italian families.

Chart 13
BREAKDOWN OF ORGANIC PRODUCTS BY SALES CHANNEL
2020
% INCIDENCE



Source: Compilation by ISMEA based on data provided by Nielsen

Chart 14
SALES CHANNELS: TURNOVER CHANGE
2020/2019
% CHANGE



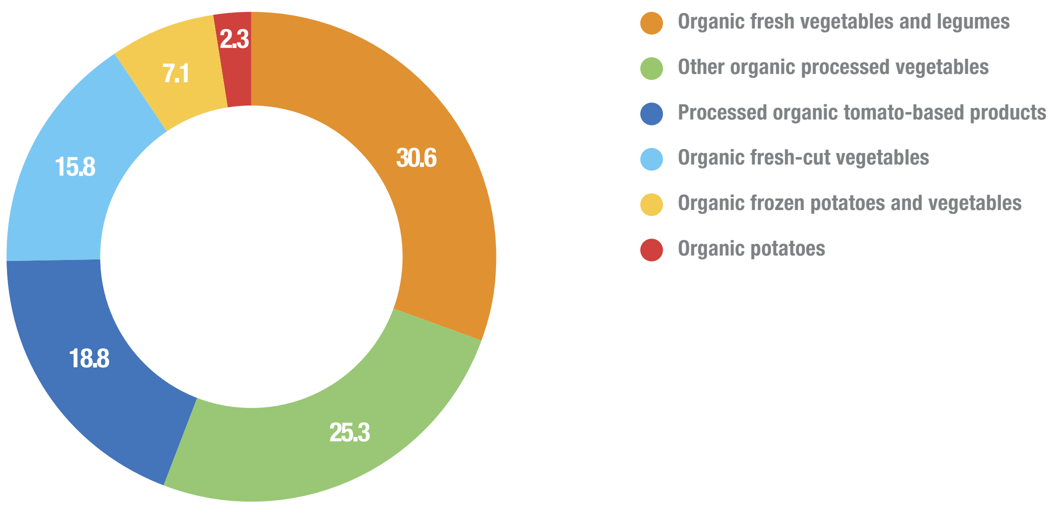
Source: Compilation by ISMEA based on data provided by Nielsen

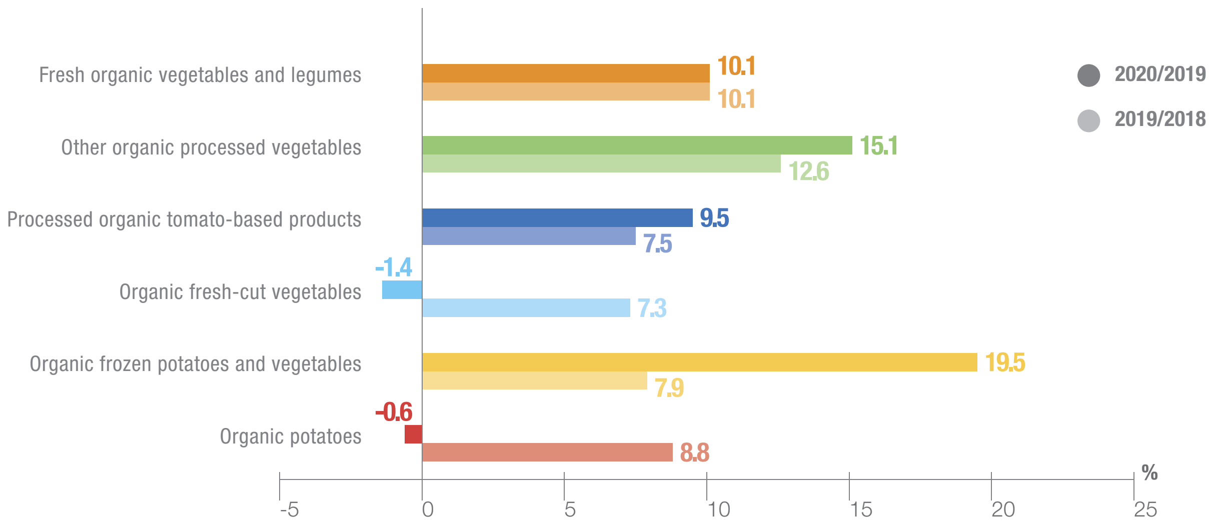
Focus on the main sectors of the large-scale retail trade

Vegetables

Vegetables in the large-scale retail sector are up +7.2% compared to 2019, driven by growing demand for processed vegetables (51% of the category), with sales in the large-scale retail sector increasing both in terms of value (+13.6%) and volume (+13.1%). The most growing products are mainly deep-frozen products (+19.5%). A slowdown in demand for fresh-cut vegetables is recorded in that they cannot be preserved; they are replaced by fresh salads and vegetables with longer shelf-life and lower price. A negative trend for potatoes is also reported due to prices increase (+4.9%) which has turned into a sales drop.

Chart 15
VEGETABLES
SPENDING IN VALUE FOR HOUSEHOLD PURCHASE OF FOOD PRODUCTS IN LARGE-SCALE RETAIL TRADE
SHARE 2020 AND % CHANGE





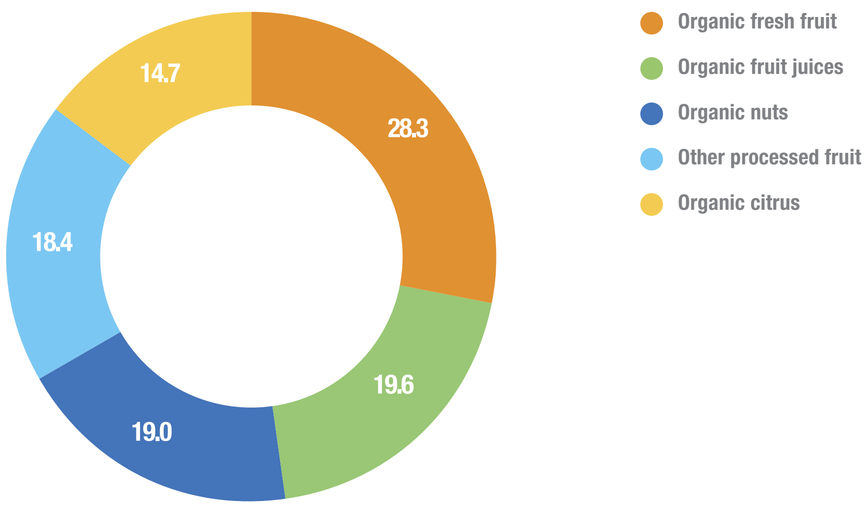
Source: Compilation by ISMEA based on data provided by Nielsen

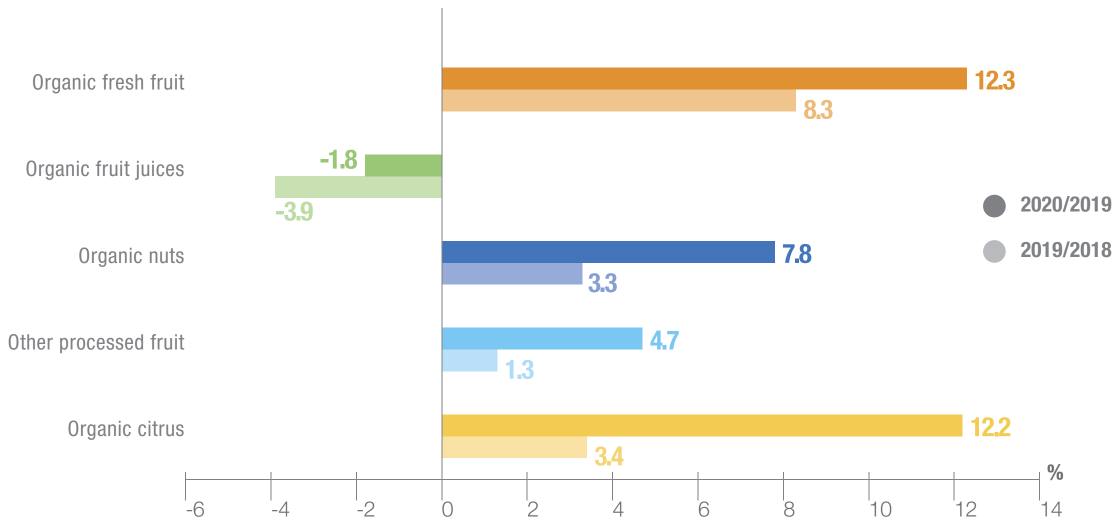
Fruit

The annual trend in **fruit** sales, updated to the first months of 2020, has increased by +2.1%. The trend is positive, especially in the large-scale retail sector, where packaged products have grown by **9%**; shops have shown a trend reversal (+1.5%) compared to last year (-5%).

Citrus fruit also performed well, **+12.2%** despite higher prices (**+5.7%**).
Fruit juices show a negative sign for the second consecutive year. In this case, the decline in prices (-1.3%) has not helped sales.

Chart 16
FRUIT
SPENDING IN VALUE FOR HOUSEHOLD PURCHASE OF FOOD PRODUCTS IN LARGE-SCALE RETAIL TRADE
SHARE 2020 AND % CHANGE



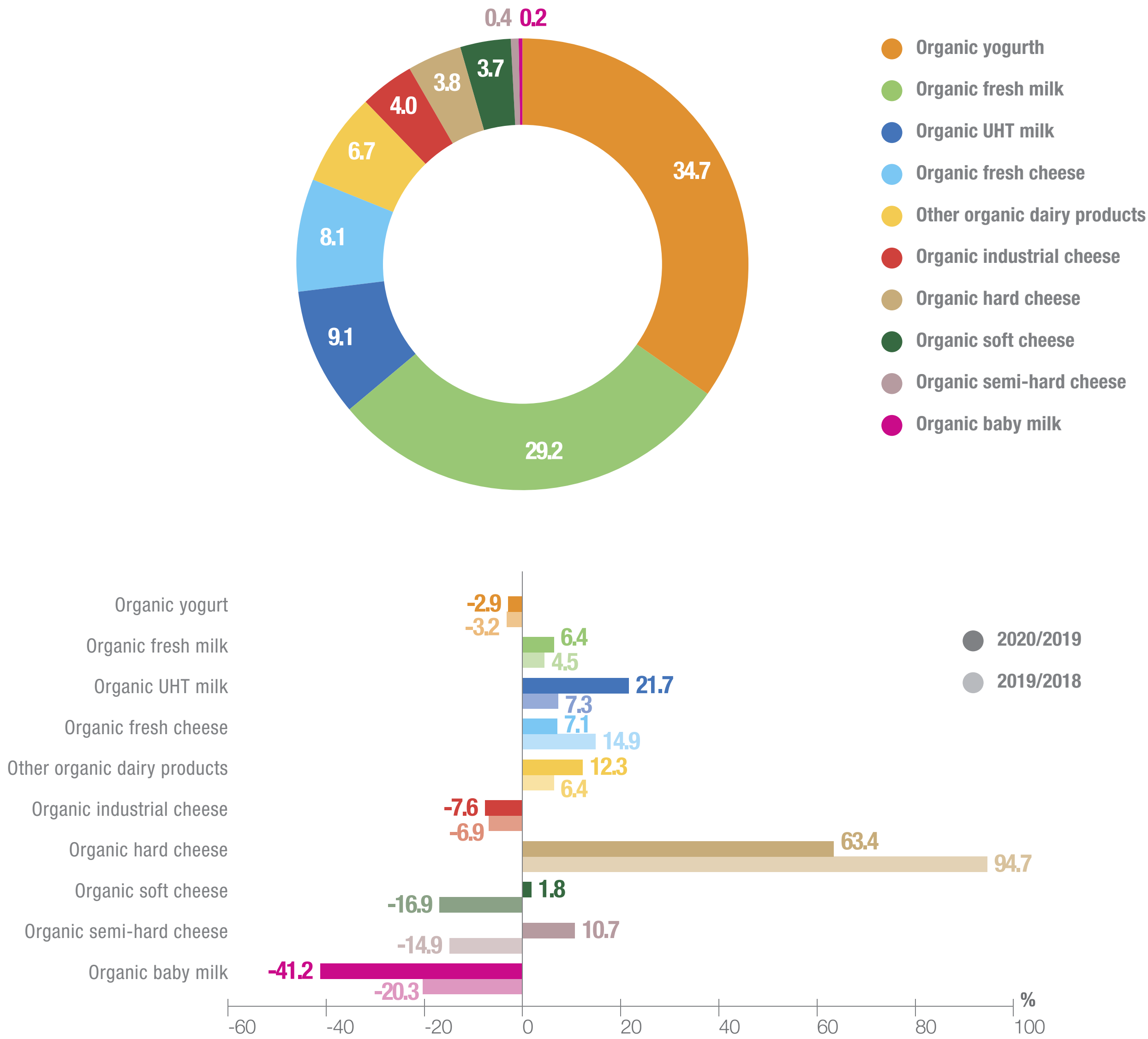


Source: Compilation by ISMEA based on data provided by Nielsen

Milk and dairy products

In the last year (June 2019-June 2020) there has been a recovery in sales of milk and dairy products (+2.3%). Within this segment, consumption of fresh milk (+6.4%) and UHT milk (+21.7%) has increased and, in particular, excellent results have been achieved by hard cheeses growing by 63.4%.

Chart 17
MILK AND DAIRY PRODUCTS
SPENDING IN VALUE FOR HOUSEHOLD PURCHASE OF FOOD PRODUCTS IN LARGE-SCALE RETAIL TRADE
SHARE 2020 AND % CHANGE



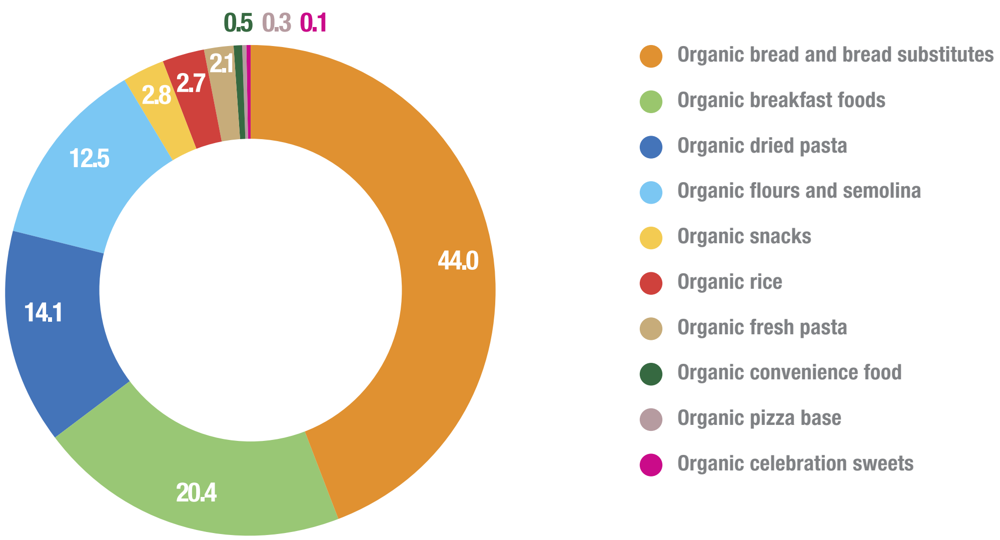
Source: Compilation by ISMEA based on Nielsen data

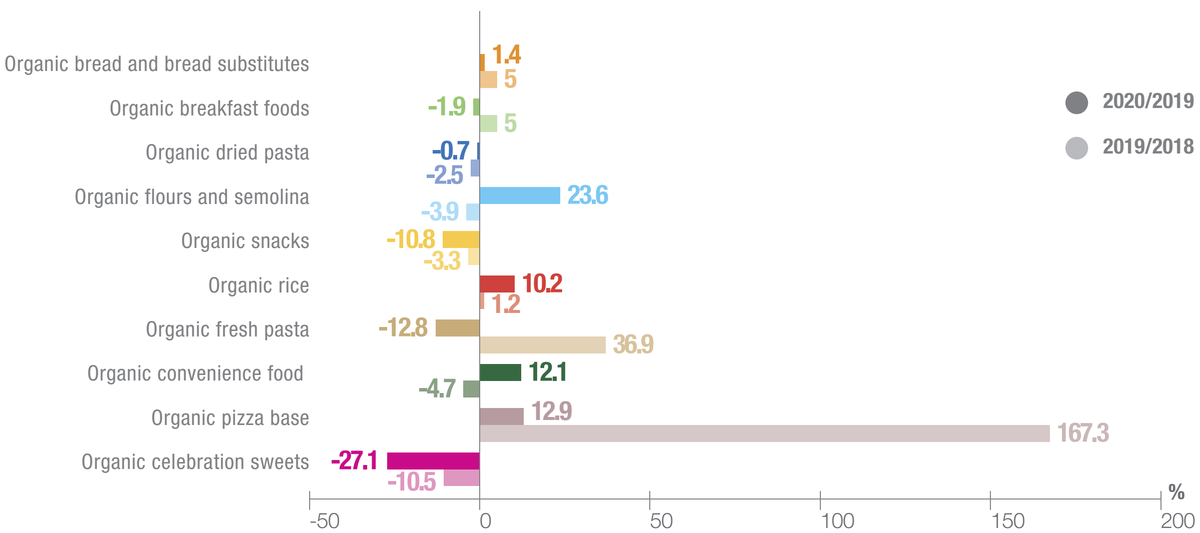
Cereals and cereal products

Expenditure on processed **cereal** products, analysed in all sales channels, increases by **2.7%**. In this particular year, consumption in the sector has been driven by flour and semolina, up by +23.6%.

As already recognised for the conventional channel, the lockdown in early 2020 encouraged the purchase, in supermarkets, of the basic ingredients of Italian cuisine essential for the preparation of "meals at home". In fact, for a few weeks flour was almost out of stock on the shelves, due to difficulties in supplying it for the unexpected growth in demand and stocks shortage.

Chart 18
CEREALS AND CEREAL PRODUCTS
SPENDING IN VALUE FOR HOUSEHOLD PURCHASE OF FOOD PRODUCTS IN LARGE-SCALE RETAIL TRADE
SHARE 2020 AND % CHANGE





Source: Compilation by ISMEA based on Nielsen data

For the aforementioned reasons, it is not surprising that the success of basic preparations and ingredients is countered by the purchase of 'ready-made bread and bread substitutes', with a growth stuck at +1.4%, although being the main category in terms of turnover, with a 44% incidence on the whole sector. The exceptional circumstance is also the most likely cause of an overall decrease in the sales of snacks, often associated with breakfast or breaks.

Eggs

As has been the case for years, **organic eggs** continue to rise, with an increasing overall incidence in the sector (14.5%). Their consumption in the first months of 2020 has further increased (**+9.7%**). The purchase price, together with the acknowledged guarantees of animal welfare in the management of laying hens, are the main factors that have ensured excellent sales.

Meat

Among the protein products of animal origin, the **meat** sector is the one that has recorded the highest increases on an annual basis. The segment that grew the most is beef, which recorded an increase in value of **+66%** on an annual basis while keeping consumer prices stable at last year's values. The trend of chicken meat, which accounts for 76% of the sector's value, was also very positive: in this case the growth recorded was +13% in value, with prices unchanged at those of 2019.

Vegetable oils and fats

For **vegetable oils and fats**, where extra virgin olive oil accounts for 89% of the entire sector, the trend is growing by **7.1%** on an annual basis.

It should be noted that in 2019 imports of organic extra virgin olive oil grew by 15.9%, placing even low-cost foreign products on the shelves, which end up on the domestic market, thereby leading to a reduction in farm-gate (-7%) and consumer prices (-0.5%).

Wine and other alcoholic beverages

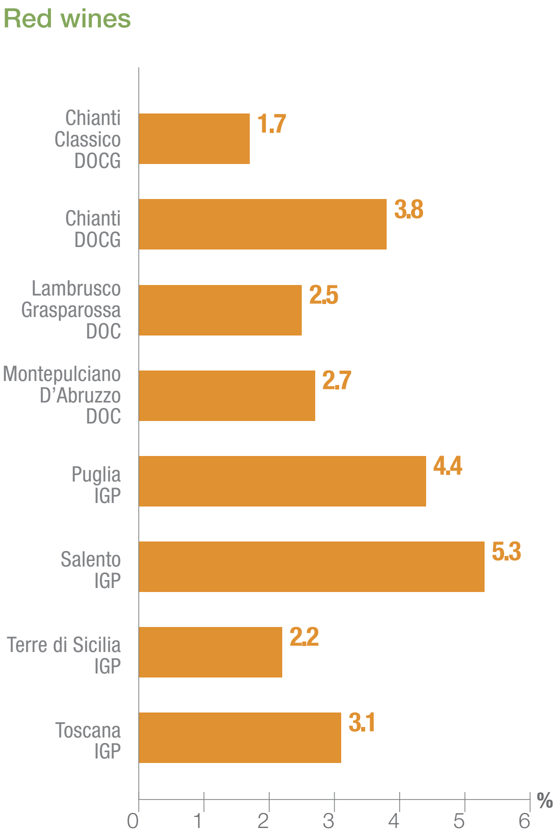
In general, the turnover of certified organic **alcoholic beverages** other than wine and beer lost **-3.4%** compared to 2019.

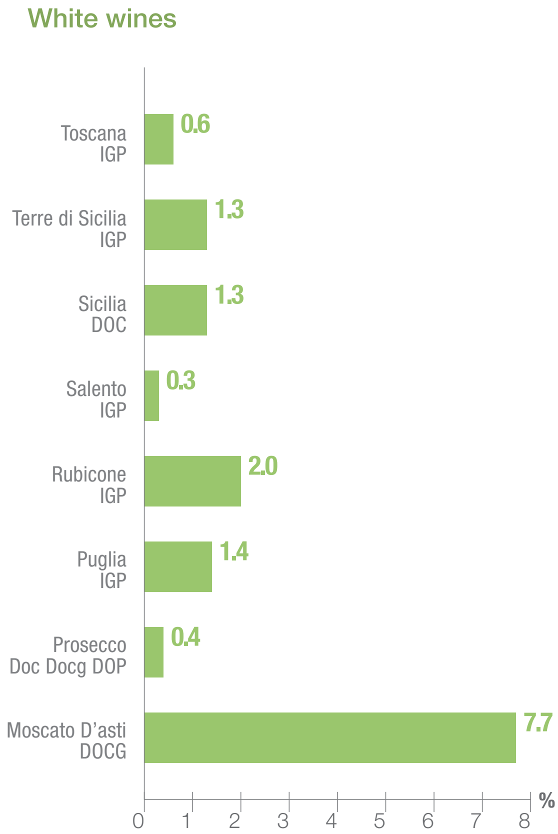
Beer, on the other hand, which had shrunk sharply last year (-20.1%), is growing by **5.9%**. Apparently, the prolonged closure of pubs and restaurants has encouraged more domestic consumption.

The consumption of **organic wine** has also shown excellent growth (**+15.5%**). The sector is driven by red wines, which account for 57% of sales in the large-scale retail sector, with a 12.8% increase on an annual basis.

The consumption of organic wines with designation of origin or geographical indications is a still small percentage: for instance, out of 100 Euros spent at the supermarket for Salento PGI red wines only 5.3 Euros can be traced back to an organic product; for white wines, organic Moscato D'Asti wines mark the greatest incidence with a cost of 7.7 Euros; hence, margins for growth and promotion of certified product are definitely huge.

Chart 19
WINES WITH DESIGNATION OF ORIGIN: INCIDENCE OF ORGANIC ON NON-ORGANIC SPENDING
2020
% INCIDENCE





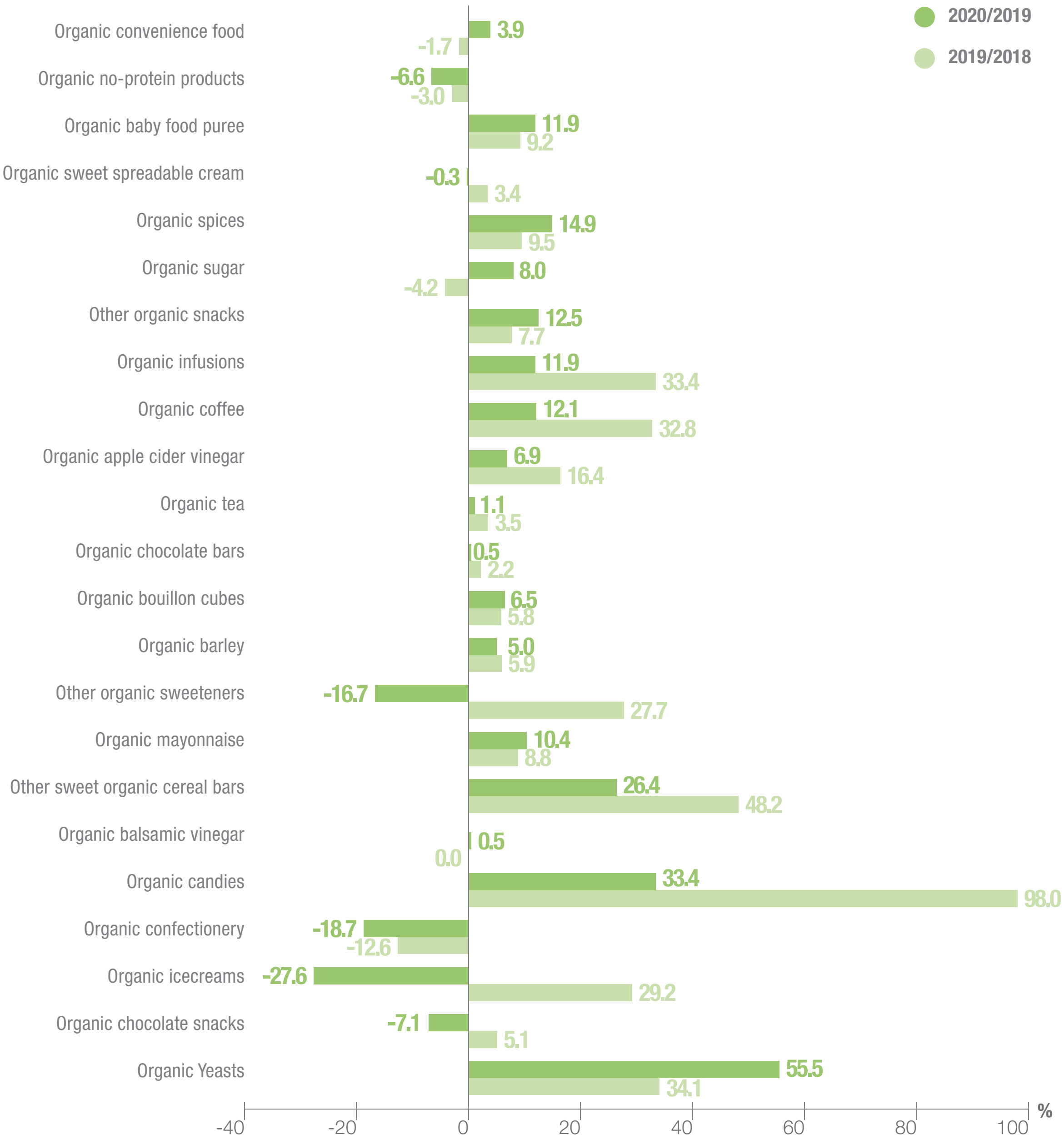
Source: Compilation by ISMEA based on Nielsen data

Other organic products

Nielsen's consumer category "Other Products" includes various items that cannot be assigned to specific product categories.

Overall, the indications arising from the analysis of the category show a cross-cutting growth for most products.

Chart 20
OTHER PRODUCTS
SPENDING IN VALUE FOR HOUSEHOLD PURCHASE OF FOOD PRODUCTS IN LARGE-SCALE RETAIL TRADE
The products are arranged in decreasing order of sales turnover
2020/2019 AND 2019/2018
% CHANGE



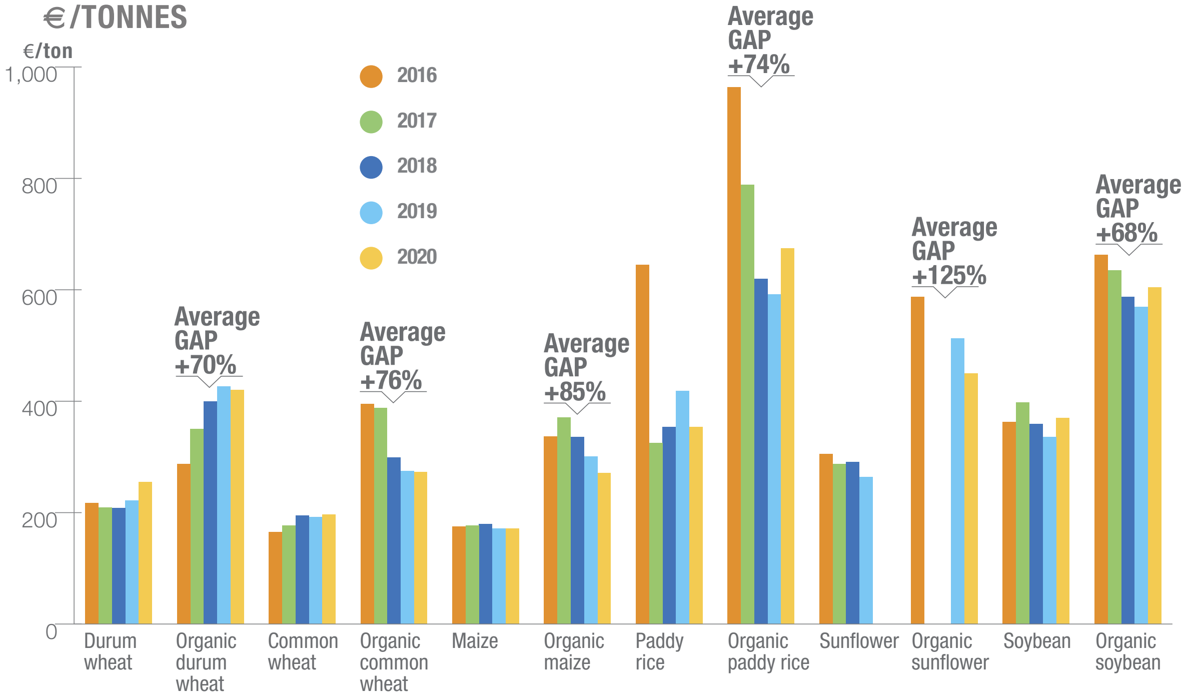
Source: Compilation by ISMEA based on Nielsen data

ORGANIC PRODUCTS PRICES

Producer prices for organic products

In the *Bio in Cifre 2020* report, the price trend of some organic products is analysed and compared with the corresponding value for conventional products in order to monitor over time the price difference granted to farmers. The comparison performed on a basket of products over a five-year period confirms that the **producer prices** of organic products are on average 60% higher, with some unexpected results for fruit and vegetables. In this sector, the gap is narrower, unlike what happens with cereals and other grains from arable crops. DIMECOBIO III project launched the permanent survey of producer prices for the main Italian vegetable and animal productions. Prices can be browsed in the biostatistics section of the website http://www.sinab.it/ or in the Ismea mercati prices section http://www.ismeamercati.it/prezzi-agroalimentari.

Chart 21
PRODUCER PRICE FOR SOME OF THE MAIN ORGANIC PRODUCTS AND THEIR CONVENTIONAL COUNTERPARTS
2016-2020
€/TONNES



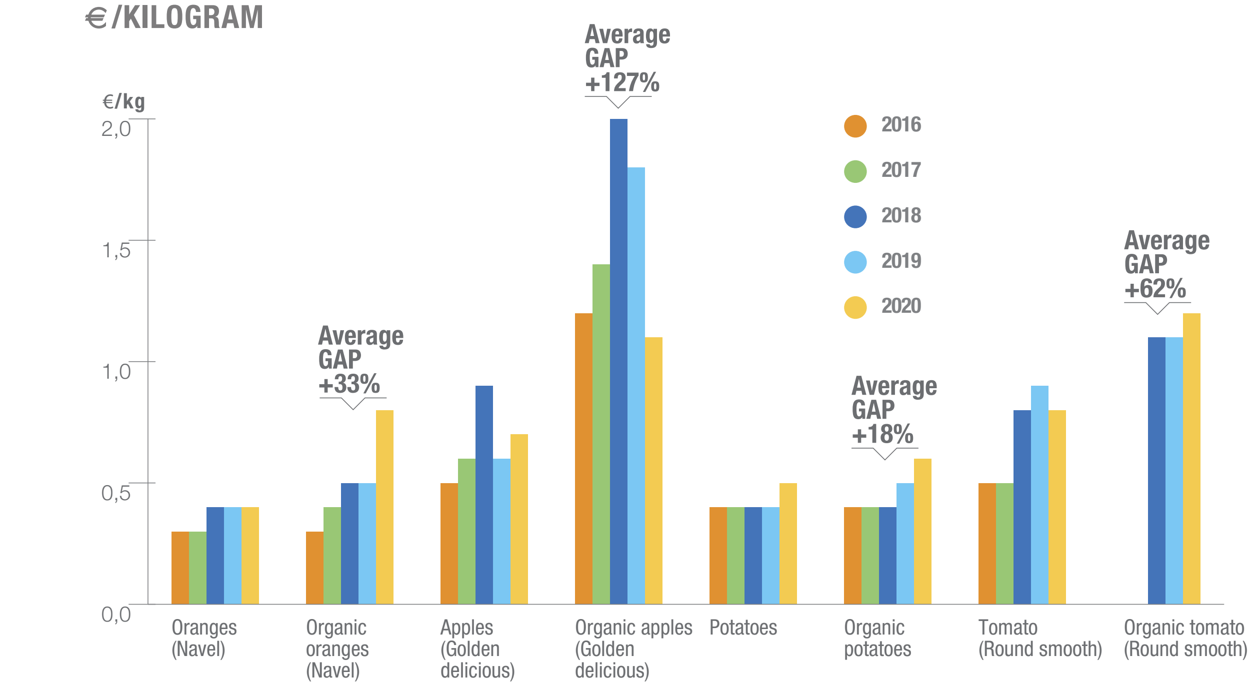
Source: ISMEA price survey network

Chart 22

PRODUCER PRICE FOR SOME OF THE MAIN ORGANIC PRODUCTS AND THEIR CONVENTIONAL COUNTERPARTS

2016-2020

€/KILOGRAM



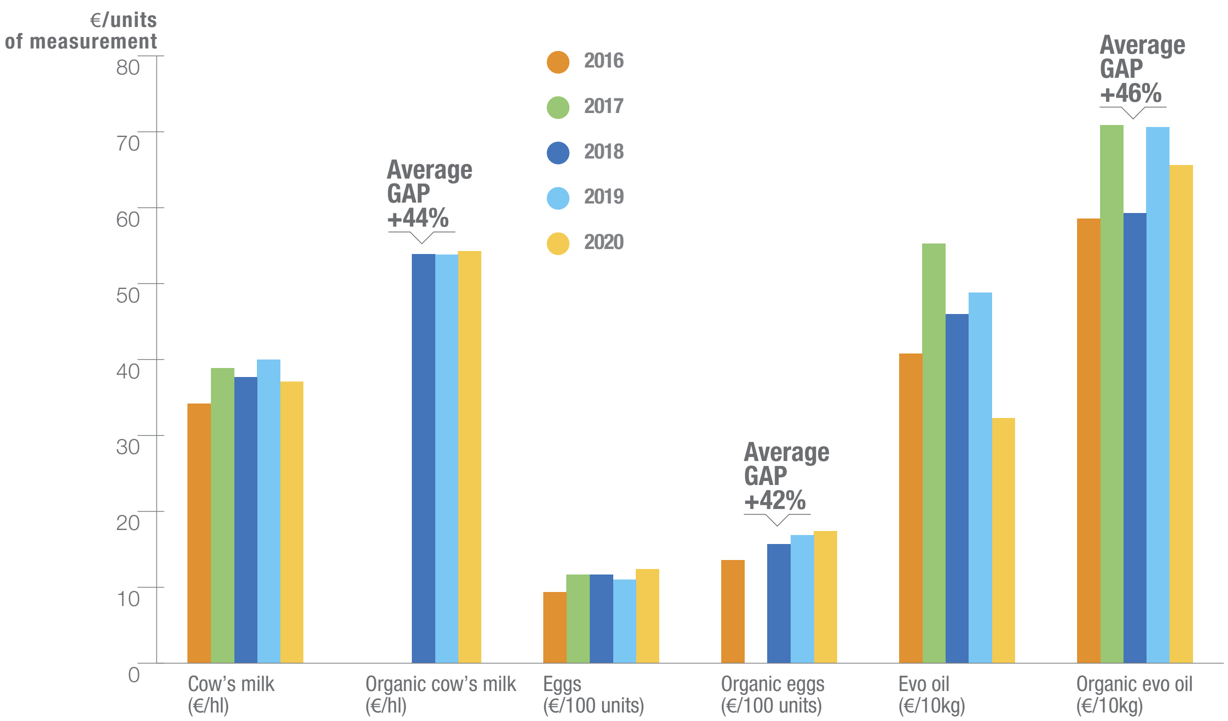
Source: ISMEA price survey network

Chart 23

PRODUCER PRICE FOR SOME OF THE MAIN ORGANIC PRODUCTS AND THEIR CONVENTIONAL COUNTERPARTS

2016-2020

€/ UNIT OF MEASUREMENT

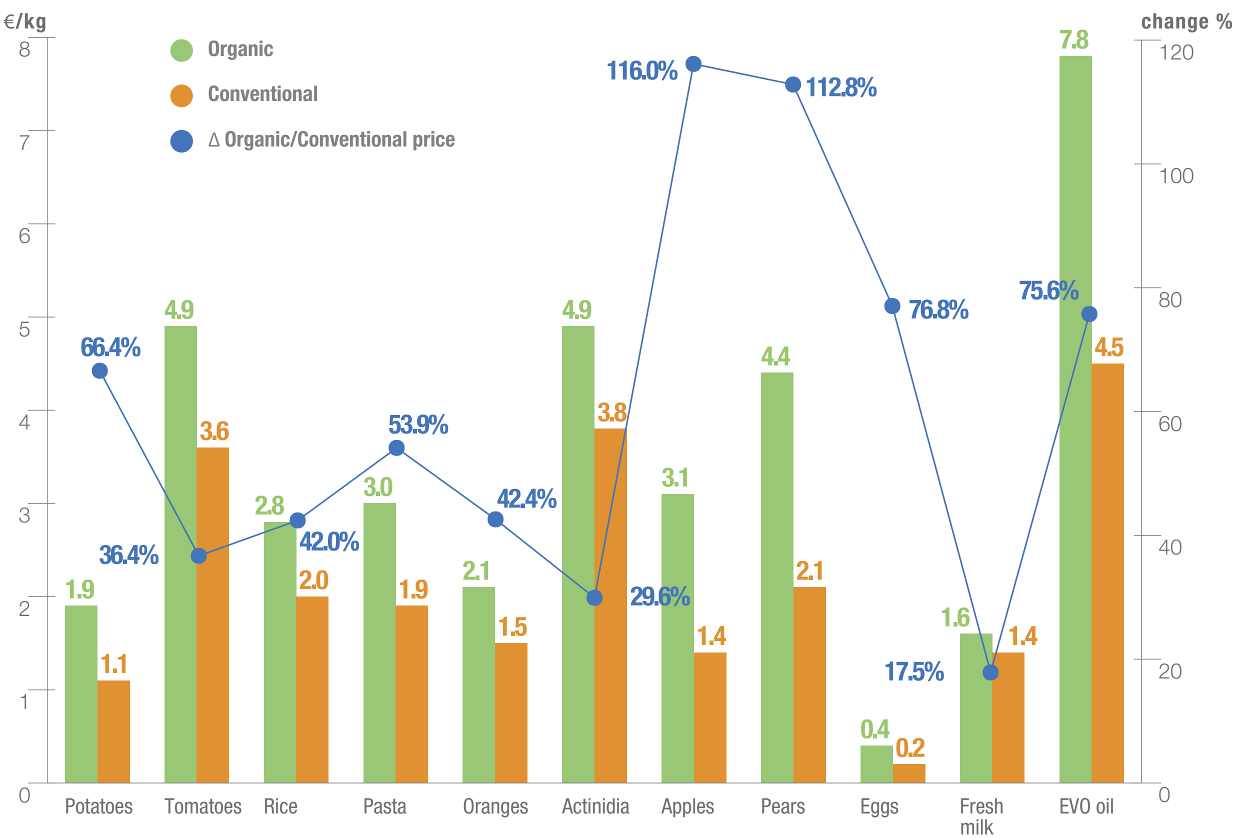


Source: ISMEA price survey network

Consumer prices in the large-scale retail trade

Consumer prices surveyed in the large-scale retail trade showed an average increase of 1.2% compared to the previous year and a drop in transactions of organic products on special offer (-10.8%).
This is due to the increase in producer prices for fresh products, in particular fruit and vegetables, with impacts on final consumer prices. In fact, the basket considered reports an above-average increase in prices for fruit (oranges +2.2%, actinidias +1.6%, pears +6.4%); for vegetables, an increase by 1.2% for potatoes and +0.4% for tomatoes.
On the other hand, extra virgin olive oil (-0.5%), pasta (-1.6%) and rice (-2.2%) show a negative trend.

Chart 24
CONSUMER PRICES OF SOME ORGANIC PRODUCTS AND OF THEIR CONVENTIONAL COUNTERPARTS
2020
PRICES IN EURO AND % CHANGE



Source: Compilation by ISMEA based on Nielsen data

FOCUS: CONSUMPTION OF ORGANIC PRODUCTS DURING THE LOCKDOWN

Reference period

9 March 2020 -17 May 2020

The restrictions imposed by the decrees issued in response to the COVID-19 crisis have had an impact on the consumption habits of Italians. The almost total closure of the Horeca channels, restrictions on travel and agile work have forced Italians to consume meals at home. This has inevitably led to an increase in household spending and a change in purchase habits.

This in-depth analysis provides an overview of the sales trend of **packaged organic food products** sold by large-scale retailers during the lockdown period imposed in Italy by the Prime Minister's Decree on 9 March 2020 (reference period 9 March-17 May 2020).

Data have been processed on a regional and macro-area basis in order to assess the different approach to certified production in territories with different levels of pressure and impact of the pandemic. Where possible, a comparison is made with the consumption trend in the overall agri-food sector, which has been very dynamic in the early stages of quarantine.

The end-user retail demand for organic products in different areas of the country

The analysis concerns packaged food products and does not include bulk sales. To date, however, most of the certified product sold through large-scale retail trade is packaged and the organic corners where goods are sold in bulk are rarely displayed.

The scenario is therefore representative of the sector; however, during the period of forced confinement, lots of Italians decided to switch to e-commerce and to the various platforms that market organic products. As in the conventional agri-food sector, transactions in the organic sector in the large-scale retail channel increased during quarantine: sales in Italy increased by **11%** compared to the same weeks in 2019. Although the sector has been showing encouraging growth trends for years now, it is nevertheless clear that the phenomenon has a direct connection with the exceptional period.

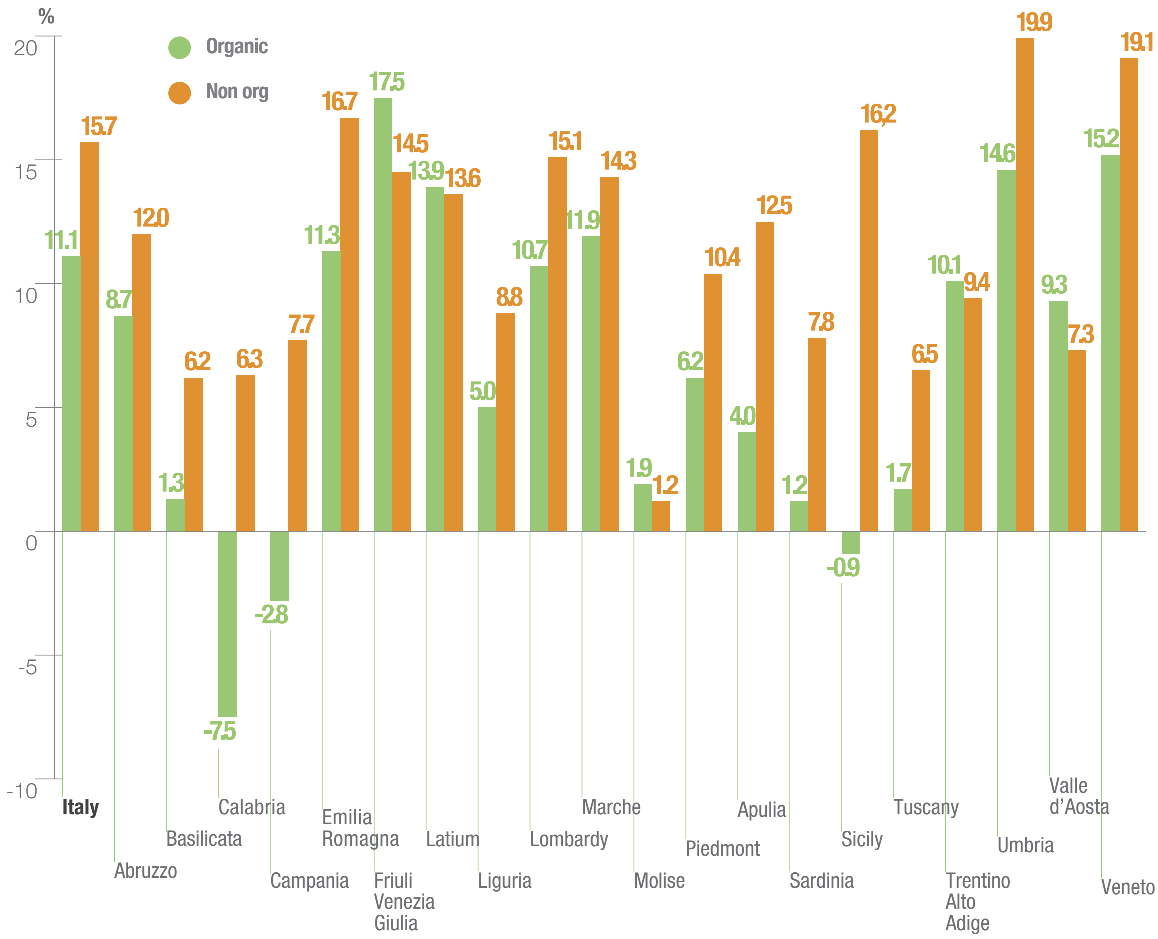
The analysis of sales in supermarkets and hyper-markets on a regional basis shows that sales of fixed-weight food products are increasing in almost all territories.

In this case too, the purchasing behaviour of consumers in the north and south of the country stands out. In some regions such as Friuli-Venezia Giulia (+17%), Umbria (+15%), Latium (+14%) organic products are growing, in relative terms, whereas in the South higher sales in supermarkets have been recorded only for non-organic agrifood products during lockdown. In Calabria, Campania and Sicily there was even a drop in organic sales compared to the same period in 2019. As before March, organic products accounted for just over 3% of total spending by Italians in the Modern Retail sector during lockdown.

In short, both the organic and conventional agri-food sectors as a whole have grown simultaneously and significantly during lockdown.

Chart 25

CONSUMPTION VALUE:
REGIONAL TREND OF PURCHASES IN SUPERMARKETS AND HYPERMARKETS
PERIOD: MARCH-MAY 2020/MARCH-MAY 2019
% CHANGE



Source: Nielsen Large-Scale Retail Fixed-Weight Products

Main organic sectors during lockdown

The specific consumption trend of individual organic products during lockdown shows the radicalisation of some phenomena already manifest in the conventional food sector; medium and long-life products are preferred to fresh ones. In the fresh sector, the categories where organic products are highly appreciated are fruit (+7%) and vegetables (+20%), which together account for more than 36% of organic products in large-scale retail trade.

Cereal products (24% of organic spending) have a differentiated behaviour that rewards long-life dry products (dried pasta +3%, rice +15%) and above all the ingredients needed for home production of pasta or pizza (organic flour +92%, base and pizzas +63%).

The COVID-19 emergency has had major impacts on the dairy sector. However, consumption of certified organic dairy products was not seriously affected, even though trends were varied: long-life milk (+41%) sold better than fresh milk, cheese continued to grow (+14%) even better than before confinement.

Organic eggs are even more appreciated by consumers (+25%) during lockdown, as they are an essential ingredient to be kept in the fridge for the preparation of fresh pasta and desserts. The stagnation of sales of the latter on supermarket shelves confirms the Italians' approach to do-it-yourself cookery preparations.

Organic wine is a category that has been growing for a long time but this item is limited to 2% of the Italian consumer's organic basket. During the lockdown, the positive trend seems to have slowed down compared to the previous period even though the organic wine sales through specialized e-commerce sites may bias the overall assessment.

Without a doubt, the sector suffers more than the others from the consequences of the health emergency as a large part of the product is normally delivered by out-of-home catering.

Table 11
CONSUMER SALES TREND FOR THE MAIN ORGANIC ITEMS
PERIOD: MARCH-MAY 2020/MARCH-MAY 2019
% CHANGE

Organics consumption large-scale retail	Lockdown
ORGANIC PRODUCTS	+11.0%
Confectionery and desserts	+3.0%
Drinks and alcoholic beverages (excl wine)	+15.0%
Beer	-5.0%
Fresh meat	+34.0%
fresh poultry meat	+18.0%
fresh beef	+123.0%
Cereal products	+7.0%
Flours and semolina	+92.0%
snacks	-29.0%
bread and substitutes	-4.0%
Fresh pasta	-22.0%
dried pasta	+3.0%
base and pizzas	+63.0%
breakfast products	-7.0%
rice	+15.0%
Fruit	+7.0%
Fresh fruit	+13.0%
nuts	-17.0%
Processed fruit	+2.0%
Fish	+32.0%
Milk and dairy products	+8.0%
yogurt	-9.0%
cheese and dairy products	+14.0%
fresh milk	+9.0%
UHT milk	+41.0%
Honey	+43.0%
Extravirgin olive oil	+13.0%
Vegetables	+20.0%
fresh-cut vegetables	-14.0%
fresh vegetables	+10.0%
processed vegetables	+30.0%
Cured meat	+18.0%
Eggs	+25.0%
Sparkling wines+champagne	+4.0%
Wine	+12.0%

**data as of May 17, 2020*

Source: Nielsen, Large -Scale Retail Fixed-Weight Products

The value of promotions in the sales of organic products

During the lockdown, the value of products purchased on sale decreased throughout Italy compared to the same period last year. A trend that affects organic products at an even higher level (-22%); in particular, in Central and Southern Italy, where stores are less well equipped and the range of certified products is also lower, special discounts have decreased more strongly.

The sectors most affected by the drop in products on sale are those where demand is greatest and sometimes the difficulties of supply are evident: fresh fruit -35% and fresh vegetables -14%, eggs -62%.

Table 12
VALUE OF PROMOTIONS DURING LOCKDOWN
PERIOD: MARCH-MAY 2020/MARCH-MAY 2019
% CHANGE

«Any promo»	Italy	North-West	North-East	Centre and Sardinia	South and Sicily
Organic	-22%	-17%	-21%	-31%	-22%
Non organic	-11%	-10%	-9%	-14%	-10%

Source: Nielsen Large -Scale Retail Fixed-Weight Products

Concluding remarks

The estimates of the organic sector in the period of the health emergency substantiate how, in this phase, the Italians have been even more cautious in the choice of products that feature food safety, controlled and certified quality and traceability.
The phenomenon is all the more clear in areas where the virus has been more aggressive. In the north of the country, organic farming has been more deeply rooted for years and the data presented do not fully describe the potential of the sector in online sales. An Ismea study performed early in the year on a sample of 3,792 individuals shows that 25% have purchased, at least once, an agri-food product on the Internet; among them, more than half have opted for an organic product. Most of them are consumers living in large cities (over 500,000 inhabitants) and in the north of the country.
On the contrary, the South is more reluctant. During quarantine, sales of organic products, in absolute terms, have also grown in several southern regions but to a lesser extent and especially not in the terms recorded for conventional products.
In this context, the lack of well-organised brands on the territory for the sale of organic products, especially in terms of infrastructure and logistics, and the need to hold down the costs of agri-food spending due to the economic problems impacting the income of some consumers, could play against the sector.
As regards promotional sales, the current difficulties have certainly not allowed Italians to pay due attention to the discounts offered by the various large-scale retail outlets. Moreover, the higher supply cost of foodstuffs due both to production and recruitment problems, a feature typical of some chains, and to logistical problems and transport costs, have reduced margins and the possibility of including them in promotional sales.

Confidence climate Index

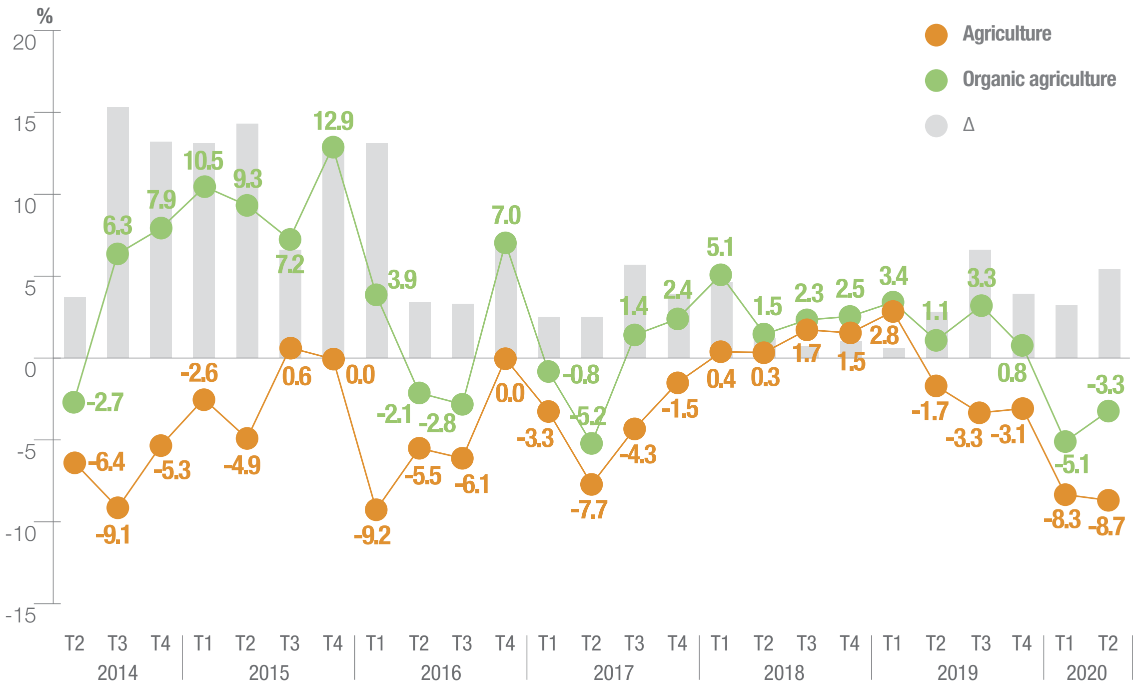
For years, the "Bio In Cifre" report has been taking the pulse of organic operators by updating the confidence climate index **(Chart 26)**. This is an interesting tool that constantly measures the confidence and expectations of the farmers interviewed about the economic situation and medium-term prospects.
A sample of 800 farmers are asked to answer two questions about current business trends and their economic expectations for the future. The index ranges from -100 to +100; the

maximum value is reached when all respondents express a positive opinion on their business status and future prospects. On the contrary, negative values show a negative perception of the farm's performance. The values of the first six months of 2020 mark an obvious divide with the time series due to the upheaval of the world economies and of the agricultural sector itself. In the first three months of the year, uncertainty and difficulties in maintaining business operations discouraged organic and non-organic farmers. The index is negative for all types of farming although, even in this difficult case, the organic trend line overcomes the conventional one.

The second quarter already witnesses a slight return of confidence that concerns only organic operators. This feedback is not so much a response to the evaluation of the current difficulties but rather derives from the optimism of the farmers towards the future; the analysis of the answers given to the question about the expectations of future business performance **(Chart 28)** shows that few other times farmers have been so confident about the economic future.

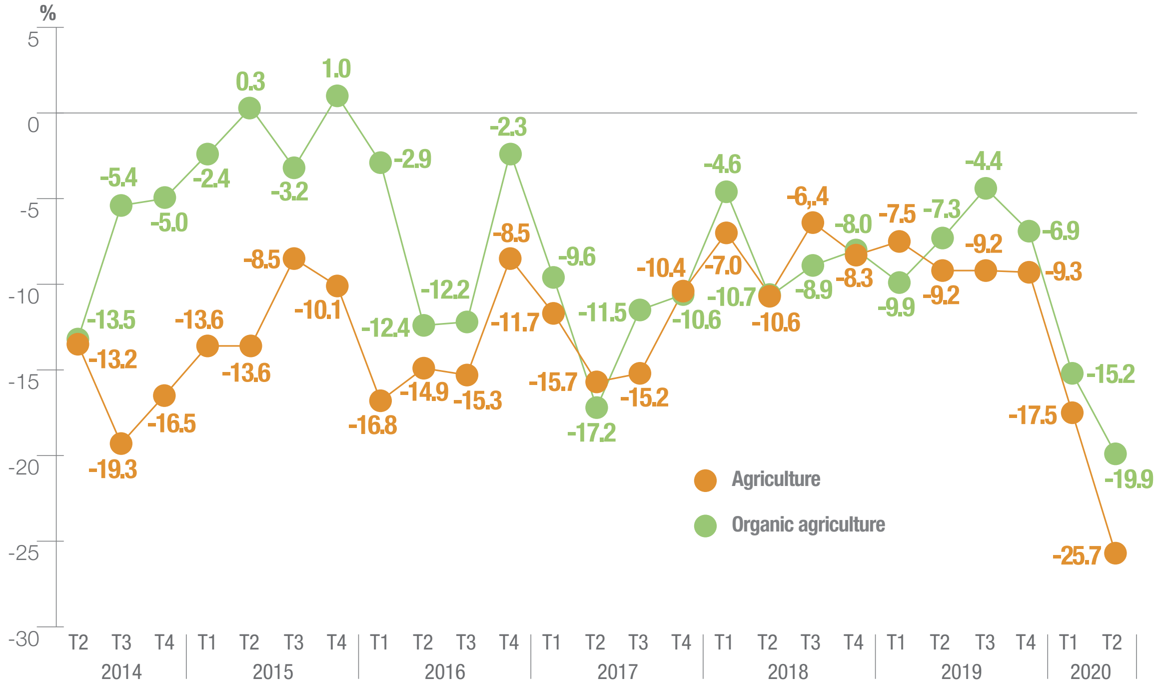
Several assessments have been made to better explain the answers: first of all, such a profound economic crisis is necessarily followed by a restart. The recovery in this case is in favour of the agricultural sector, which during COVID-19 showed resilience and renewed its leading role in the world market scenario. Secondly, the optimism of operators, analysed in the second quarter, was encouraged by the recognition of the role that organic farming will play in the definition of European agricultural policy for future strategies.

Chart 26
CONFIDENCE CLIMATE INDEX*
2020 – FIRST SEMESTER
% CHANGE



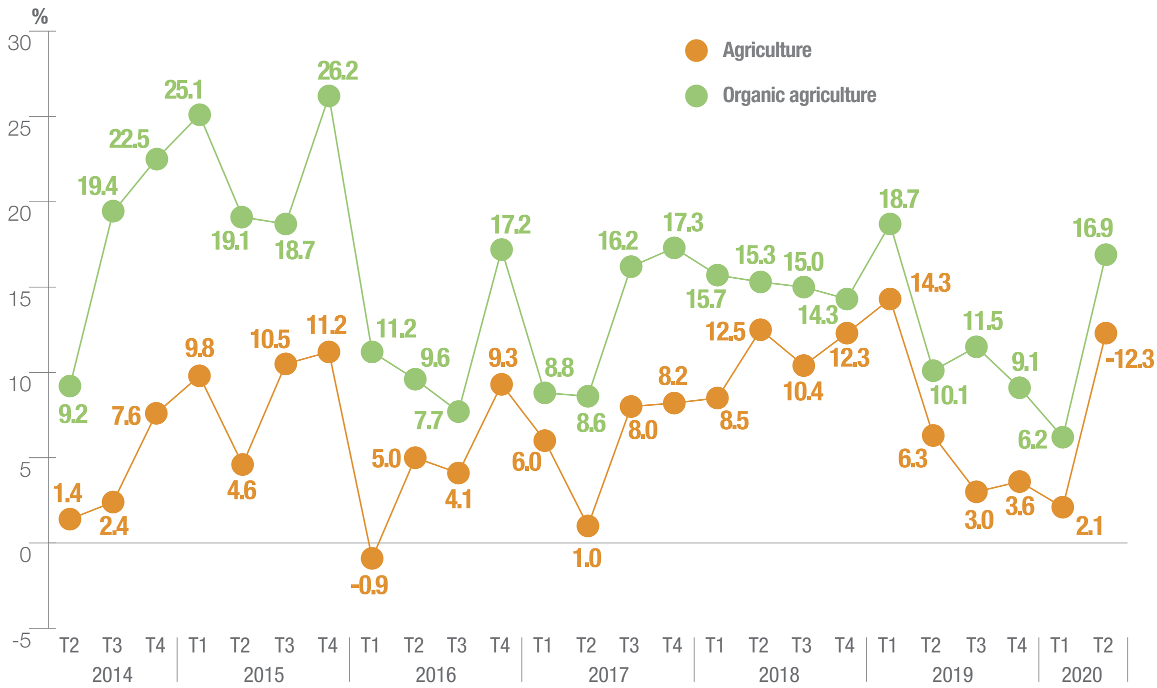
**Data reported in the charts are the balance between answer percentage shares (Positive answer share - Negative answer share)*
Source: ISMEA Panel on agricultural holdings

Chart 27
HOLDING'S CURRENT BUSINESS PERFORMANCE
2020 – FIRST SEMESTER
% CHANGE



Source: ISMEA Panel on agricultural holdings

Chart 28
EXPECTATIONS ON FUTURE BUSINESS PERFORMANCE
2020 – FIRST SEMESTER
% CHANGE



Source: ISMEA Panel on agricultural holdings

IMPORTS
FROM THIRD COUNTRIES

FIGURES ON ORGANIC FARMING

Data
MiPAAF
Ministry of Agriculture, Food and Forestry Policies

Source
SIB
Organic Information System

Compiled by
SINAB
National Information System on Organic Farming
Marie Reine Bteich
Fabiana Crescenzi
Francesco Solfanelli

This section is the result of the collaborative effort of a working group on import of organic products, set up in the framework of DIMECOBIO III 2018-2020 project, and including Giacomo Mocciaro (MiPAAF), Luca Romanini and Patrizia Pugliese (CIHEAM Bari), Raffaele Zanoli (UNIVPM), as well as the three aforementioned authors.

Import of organic products from third countries is regulated by Regulation (EC) No 834/2007, Regulation (EC) No 889/2008, and Regulation (EC) No 1235/2008. These regulations stipulate that import of organic products from third countries can take place in two different ways:

a Imports from third countries recognised by the EU Commission as having production standards and control measures equivalent to the rules in force in the European Union. Recognised third countries are listed in Annex III to Regulation (EC) No 1235/2008, and subsequent amendments and additions.

b Imports by operators from third countries adopting a production method which is deemed to be equivalent by Control Bodies, authorised by the EU Commission to operate in certain countries and for certain product categories. The list of Control Bodies recognized for the purpose of equivalence in the various countries is reported in Annex IV to Regulation (EC) No 1235/2008, and subsequent amendments and additions.

The data presented in this publication considers both imports under the equivalence system described in point a) and imports under the equivalence system described in point b). Moreover, it should be specified that data compilation does not take into account intra-Community trade activities and, consequently, not all amounts of organic products entering Italy from third countries via other Community countries are included. The following tables and charts have been prepared by SINAB on the basis of data collected from the written notification that importers are requested to send to MiPAAF and to the relevant Control Body (in accordance with Article 84 of Regulation (EC) No 889/2008 and Ministerial Decree No 8283 of 6/2/2018 which repealed Ministerial Decree No 18378 of 8/8/2012).

From March 2018, notifications of incoming goods must be made exclusively through the "Import Communication Management" form on the **SIB (Organic Information System)** provided by MiPAAF. To ensure high data quality regarding the amount of organic product imports, SINAB has carried out further consistency and data quality checks, also using the **TRACES** (TRAde Control and Expert System) database. TRACES is the European Commission's online management tool for all administrative procedures related to intra-Community trade and import of animals and products from third countries within the European Community. Pursuant to Reg. (EC) No 1235/2008, as amended by Reg. (EU) No 2016/1842, since 19 October 2017, also imports of organic products from third countries into the EU have been managed through the TRACES platform. Therefore, access to the TRACES database makes it possible to acquire information from the authorization certificates of all consignments of products imported or potentially imported from countries outside the EU (certificates of inspection).

As of 31 December 2019, **527** companies were included in the national list of importers of organic products from third countries. Data relating to the product volumes declared by these companies have been classified according to the **TARIC**[3] (Integrated Tariff of

[3]See Article 3 of Regulation (EEC) No 2658/87

the European Communities) customs tariffs, as reported by the operators in their notification on SIB and TRACES. TARIC is based on the Combined Nomenclature (CN), whose subheadings (identified by an 8 digit code number) represent the basic nomenclature for the Common Customs Tariff as well as for the statistics relating to the external trade of the Community and to trade between Member States.

All data presented here were compiled by SINAB - a project of the Italian Ministry of Agricultural, Food and Forestry policies (MiPAAF) managed by ISMEA and CIHEAM Bari – in collaboration with UNIVPM, based on the records as of 31 December 2019, notified by Organic importers to the Organic Information System.

Import of organic products from third countries – analysis of data as of 31 December 2019

In 2019, imports of organic products from third countries to Italy included **cereals** (durum wheat, common wheat, maize, rice, other cereals) as the most imported product category with a share of **30.2%** in the total imported volume, followed by **industrial crops** (soya meal, soya beans, sunflower seeds, flaxseeds, peanuts, and other industrial crops) with **19.5%**, while **fresh and dried fruit** come in third place with **17.0%** **(Chart 29)**.

Data on imports of organic products from third countries shows a substantial **increase** in total volumes in 2019, namely about **+13.1%** compared to 2018 **(Table13)**. This upward trend was mainly driven by the category of **industrial products**, with a rise of **+35.2%** compared to 2018. The other product categories showing a substantial positive trend compared to 2018 are **vegetable oils and fats (+15.9%), cereals (+16.9%)**, and the category which comprises of **coffee, cocoa, sugars, tea, and spices (+22.8%)**. In contrast, volumes of **vegetables and legumes** remained substantially unchanged compared to 2018 **(+3.1%)** **(Table 13)**.

Processed products (beverages, dairy products and honey, processed cereals, processed fruit and vegetables...), on the other hand, dropped sharply in terms of imported volumes compared to 2018 **(-26.8%)**, while **fresh and dried fruit** remained nearly unchanged **(-2.0%).**

The major drop in imports of processed products is due above all to a decline in imports from non-EU European countries, notably apple juice from Serbia.

As far as supply markets are concerned, the situation in 2019 overall remained quite the same as in 2018: with an imported volume of **18.2%** on the total, Turkey is the largest exporter, followed by **China (17.3%)** and **Tunisia (9.0%)** **(Chart 33)**.

In line with 2018, the geographical areas from where the greatest volumes of organic products are imported are **Asia** and **non-EU European countries**, which total **32.4%** and **25.9%** respectively **(Chart 32)**. However, the situation in these countries is truly diverse, with **China** playing a leading role in the import of industrial crops (above all, soya beans and soya meal), and **Pakistan, India**, and **Thailand** for rice. Among the **non-EU European countries**, **Turkey** stands out for the import of **durum wheat** and **rice** and **Ukraine** for **soya beans** and **maize** **(Tables 14 and 17)**.

Latin America still takes centre stage in Italian organic imports: overall, in 2019, **22.6%** of total volumes were imported from this geographical area. Imports from Latin American countries mostly include **fresh fruit**, especially bananas, apples, and pears **(Table 15)**, **cane sugar** (in particular, from **Paraguay, Colombia, and Peru**), and **coffee** (mainly from **Peru**) **(Table19)**.

As regards the **African continent, Tunisia, Togo,** and **Egypt** are without a doubt the countries from which the greatest amounts of organic products are imported. More specifically, Tunisia leads the way in the import of **organic olive oil** (almost all of the organic olive oil imported to Italy in 2019 came from this country), while large volumes of **soya beans** were imported from Togo. Egypt remains a major supplier of organic vegetables, mainly **potatoes** and **peanuts**. **(Tables 16, 17, and 18)**.

Imports from **North America** mainly concern **common wheat** and **maple syrup** from **Canada** and **processed fruit and vegetables** from **Mexico** **(Tables 14, 19, and 20)**.

Table 13

VOLUMES OF ORGANIC PRODUCTS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY AND GEOGRAPHICAL AREA

2018 AND 2019

TONNES

Product	Area of origin	Volumes 2018	Volumes 2019	2019/2018 % change
		t	t	%
Cereals	Africa	-	-	-
	Asia	19,911.1	24,993.9	25.5
	Central America	-	-	-
	Non-EU Europe	30,096.0	33,111.4	10.0
	North America	2,891.7	4,158.0	43.8
	Oceania	-	-	-
	South America	1,524.9	1,337.9	-12.3
	Total	**54,423.8**	**63,601.2**	**16.9**
Fresh and dried Fruit	Africa	615.0	394.3	-35.9
	Asia	570.4	751.8	31.8
	Central America	4,106.6	4,682.2	14.0
	Non-EU Europe	4,159.6	4,418.1	6.2
	North America	69.5	151.7	118.4
	Oceania	470.5	100.0	-78.7
	South America	26,573.7	25,346.8	-4.6
	Total	**36,565.5**	**35,845.0**	**-2.0**
Vegetables and legumes	Africa	1,057.1	916.0	-13.3
	Asia	8,431.2	7,964.2	-5.5
	Central America	-	-	-
	Non-EU Europe	4,923.5	6,503.0	32.1
	North America	434.3	505.2	16.3
	Oceania	-	-	-
	South America	913.2	351.9	-61.5
	Total	**15,759.3**	**16,240.3**	**3.1**
Industrial crops*	Africa	3,496.3	4,470.7	27.9
	Asia	22,759.2	28,463.5	25.1
	Central America	-	-	-
	Non-EU Europe	3,946.7	7,882.2	99.7
	North America	21.5	126.4	488.7
	Oceania	-	-	-
	South America	130.1	83.6	-35.8
	Total	**30,353.8**	**41,026.2**	**35.2**

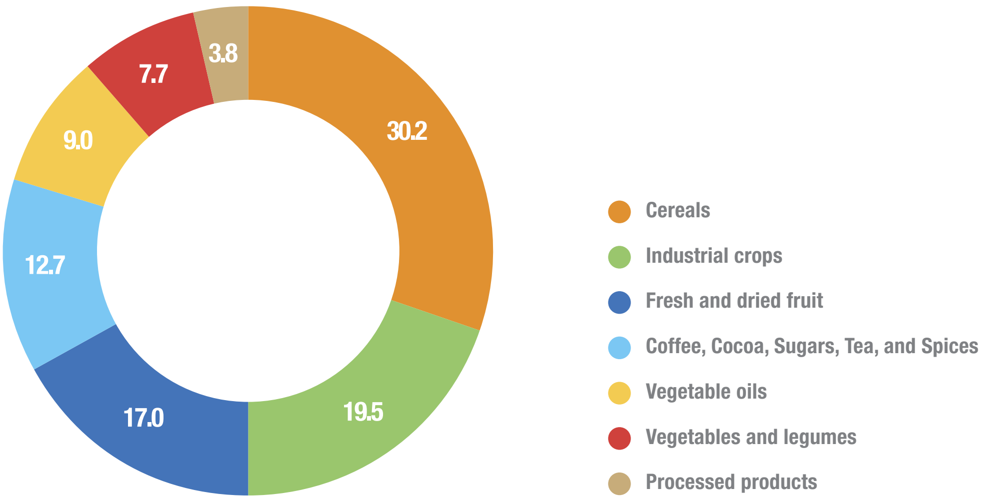
**The category "Industrial crops" also includes soybean meal*

Table 13
VOLUMES OF ORGANIC PRODUCTS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY AND GEOGRAPHICAL AREA
2018 AND 2019
TONNES

Product	Area of origin	Volumes 2018	Volumes 2019	2019/2018 % change
		t	t	%
Vegetable oils and fats	Africa	16,198.8	18,688.1	15.4
	Asia	96.6	190.1	96.7
	Central America	33.7	46.4	37.9
	Non-EU Europe	2.5	1.9	-26.8
	North America	31.0	45.7	47.6
	Oceania	-	-	-
	South America	24.9	22.1	-11.1
	Total	**16,387.5**	**18,994.3**	**15.9**
Coffee, Cocoa, Sugars, Tea and Spices	Africa	640.0	2,496.8	290.1
	Asia	2,596.0	3,353.8	29.2
	Central America	6,540.2	3,049.8	-53.4
	Non-EU Europe	540.5	333.3	-38.3
	North America	616.6	6,127.5	893.7
	Oceania	0.0	0.0	61.1
	South America	10,762.0	11,287.5	4.9
	Total	**21,695.4**	**26,648.8**	**22.8**
Processed products	Africa	887.5	859.3	-3.2
	Asia	2,547.0	2,412.5	-5.3
	Central America	7.1	1.8	-74.9
	Non-EU Europe	4,820.2	2,196.2	-54.4
	North America	977.8	1,180.8	20.8
	Oceania	0.4	0.3	-11.0
	South America	1,551.4	1,246.9	-19.6
	Total	**10,791.5**	**7,897.9**	**-26.8**
Total		**185,976.6**	**210,253.7**	**13.1**

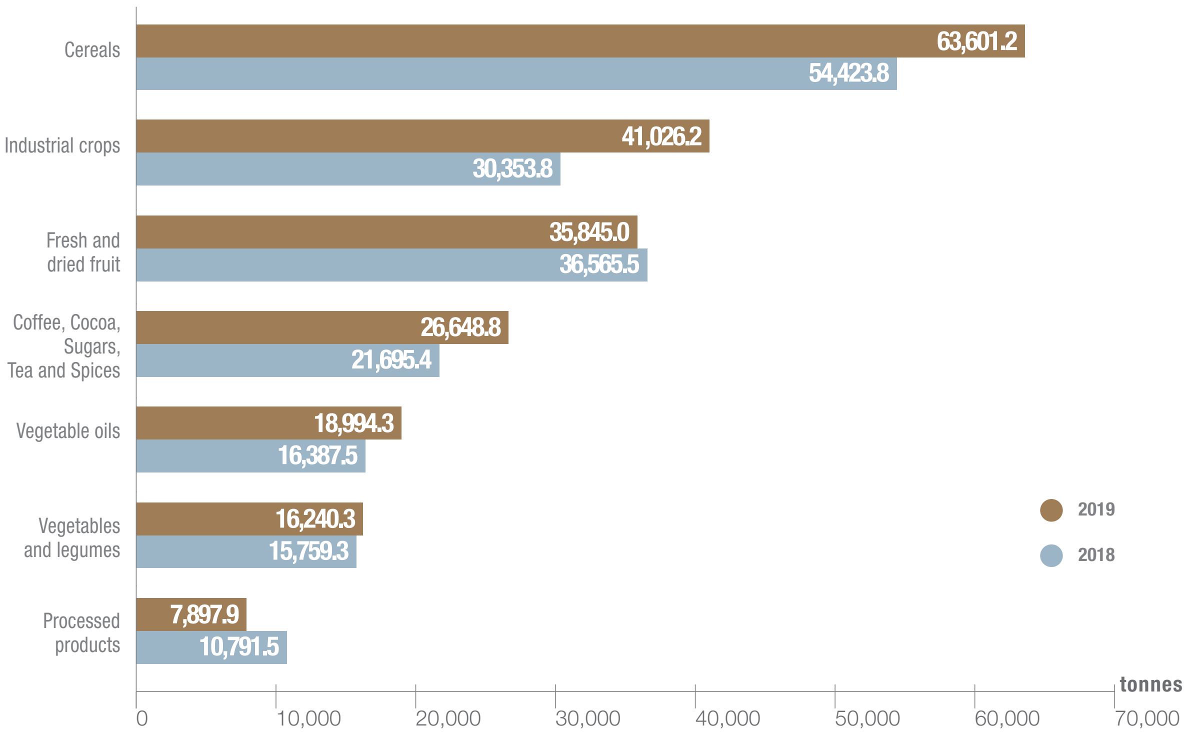
Source: compiled by SINAB based on data provided by SIB

Chart 29
SHARE OF ORGANIC PRODUCTS IMPORTED TO ITALY FROM THIRD COUNTRIES BY PRODUCT TYPE
2019
% VOLUMES



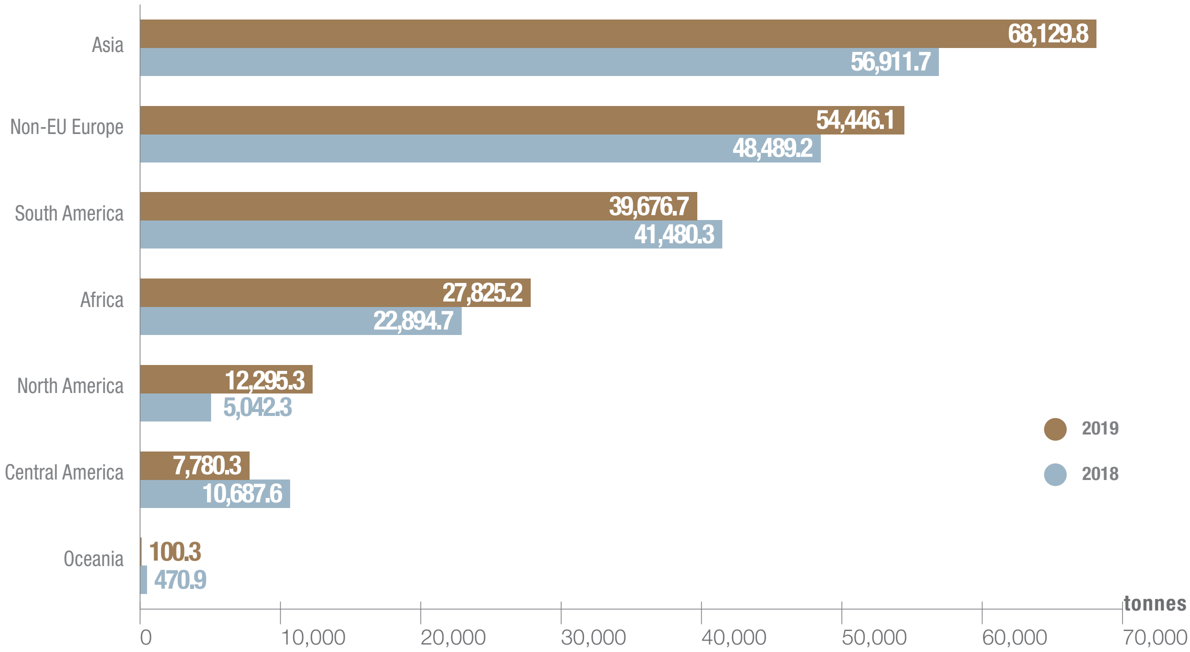
Source: compiled by SINAB based on data provided by SIB

Chart 30
VOLUMES OF ORGANIC PRODUCTS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY
2018 AND 2019
TONNES



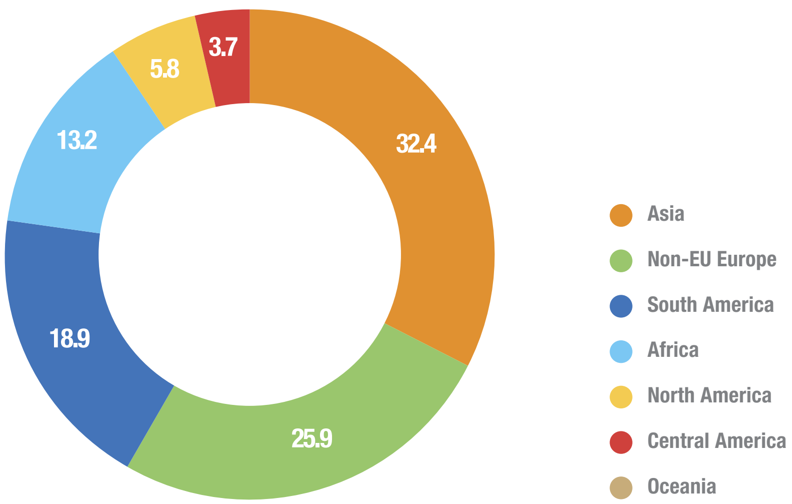
Source: compiled by SINAB based on data provided by SIB

Chart 31
VOLUMES OF ORGANIC PRODUCTS IMPORTED TO ITALY FROM THIRD COUNTRIES BY GEOGRAPHICAL AREA
2018 AND 2019
TONNES



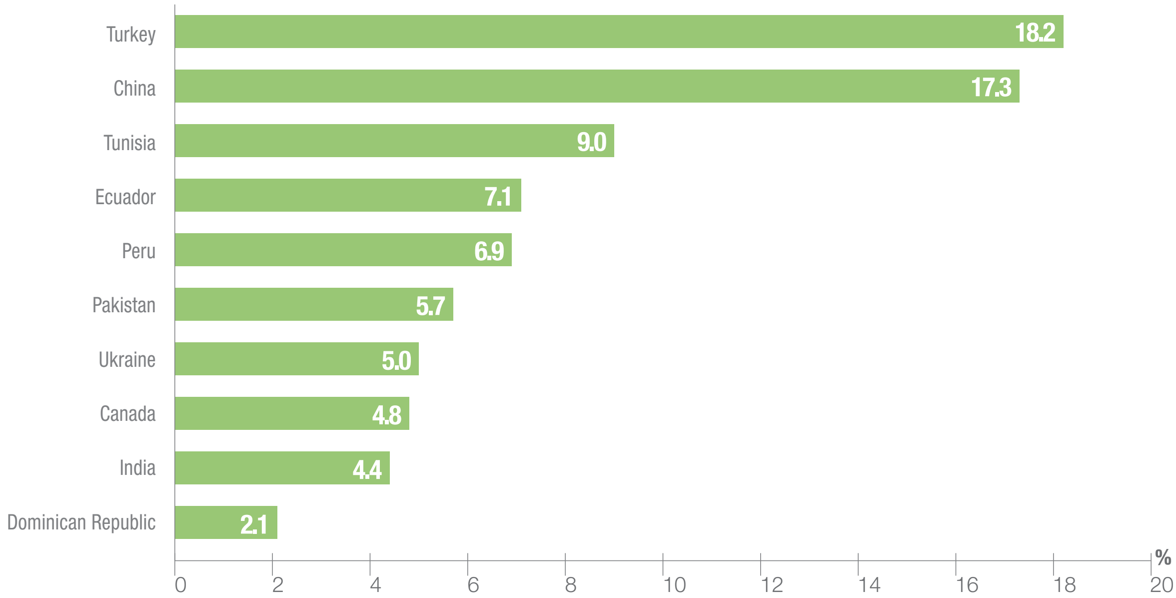
Source: compiled by SINAB based on data provided by SIB

Chart 32
SHARE OF ORGANIC PRODUCTS IMPORTED TO ITALY FROM THIRD COUNTRIES BY GEOGRAPHICAL AREA
2019
PERCENTAGE VALUE %



Source: compiled by SINAB based on data provided by SIB

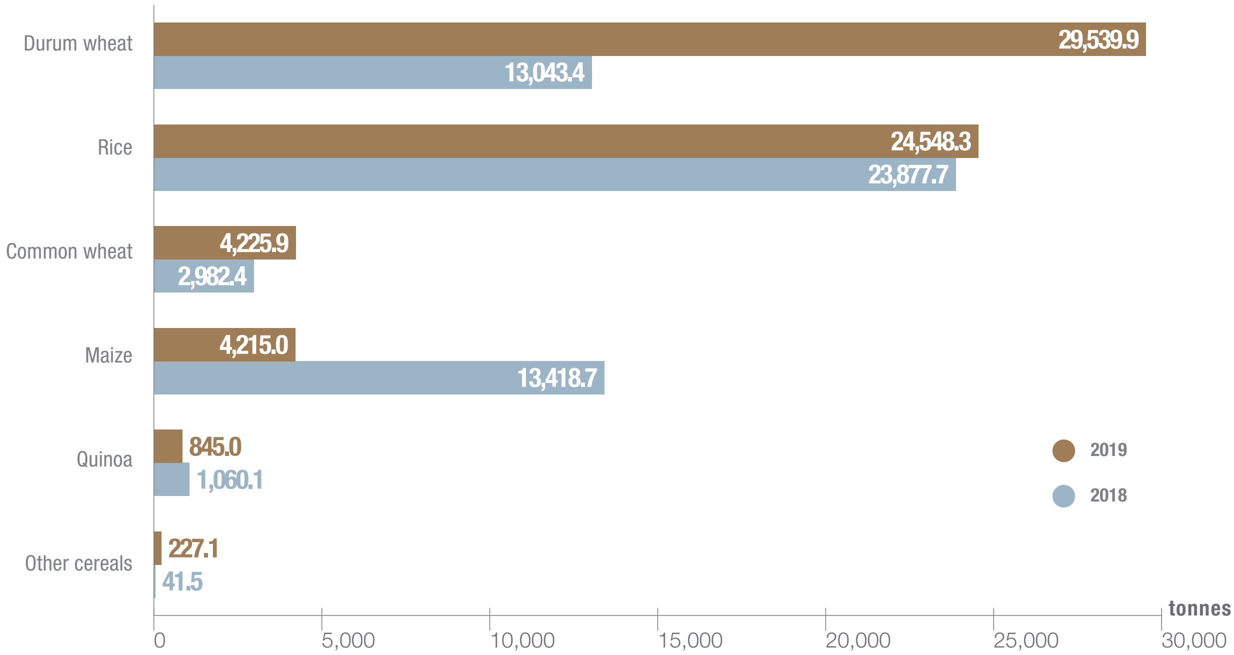
Chart 33
SHARE OF IMPORTS FROM THE TOP 10 THIRD COUNTRIES IN TOTAL IMPORT VOLUME OF ORGANIC PRODUCTS IN ITALY
2019
% VOLUME



Source: compiled by SINAB based on data provided by SIB

CEREALS

Chart 34
VOLUMES OF ORGANIC CEREALS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY
2018 AND 2019
TONNES



Source: compiled by SINAB based on data provided by SIB

Table 14

VOLUMES OF ORGANIC CEREALS IMPORTED TO ITALY FROM THIRD COUNTRIES BY PRODUCT TYPE AND COUNTRY OF ORIGIN

2019

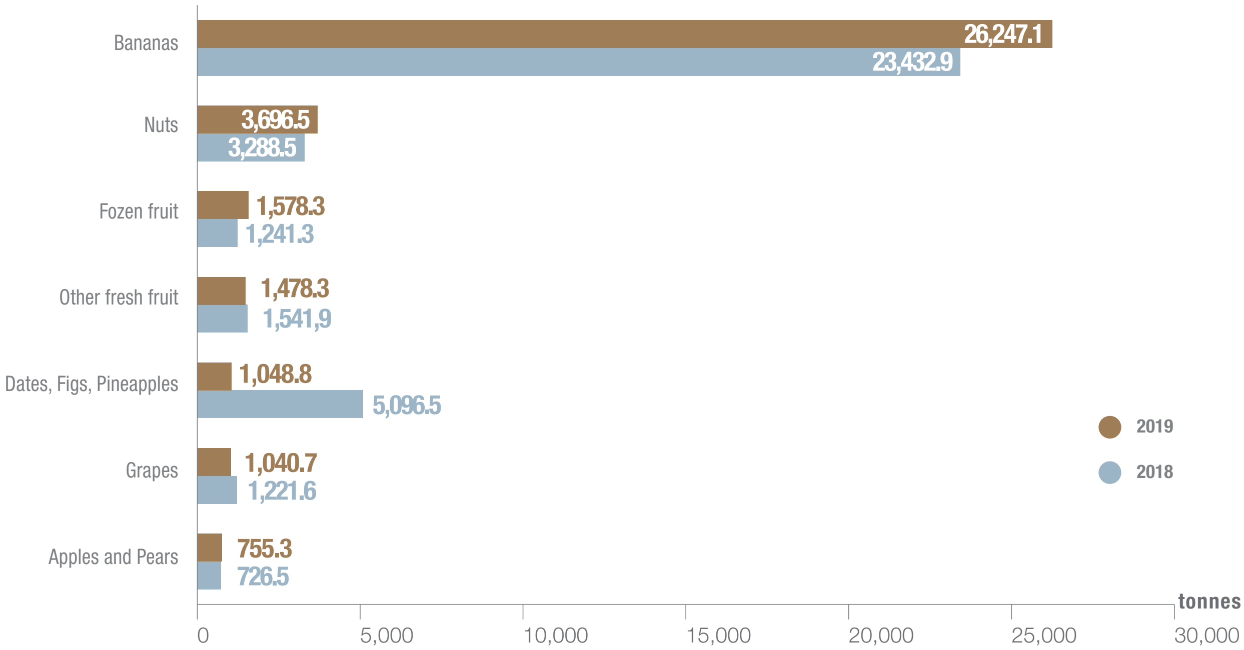
TONNES

Geographical area	Country	Durum wheat	Rice	Common wheat	Quinoa	Maize	Other cereals	Total cereals
Asia	Cambodia	-	843.0	-	-	-	-	843.0
	India	-	6,241.3	-	21.0	-	14.5	6,276.8
	Indonesia	-	2.9	-	-	-	-	2.9
	Pakistan	-	11,626.5	-	-	-	-	11,626.5
	Thailand	-	3,245.1	-	-	-	-	3,245.1
	United Arab Emirates	2,999.6	-	-	-	-	-	2,999.6
Non-EU Europe	Moldova	-	-	-	-	1,276.0	-	1,276.0
	Serbia	-	-	383.9	-	-	-	383.9
	Switzerland	-	120.0	-	-	-	-	120.0
	Turkey	26,242.5	2,150.0	-	-	-	-	28,392.5
	Ukraine	-	-	-	-	2,939.0	-	2,939.0
North America	Canada	297.9	-	3,842.0	-	-	-	4,139.8
	United States	-	-	-	-	-	18.2	18.2
South America	Argentina	-	66.0	-	-	-	-	66.0
	Bolivia	-	-	-	197.0	-	-	197.0
	Brazil	-	253.5	-	-	-	-	253.5
	Peru	-	-	-	627.0	-	194.4	821.4
Total		29,539.9	24,548.3	4,225.9	845.0	4,215.0	227.1	63,601.2

Source: compiled by SINAB based on data provided by SIB

FRESH AND DRIED FRUIT

Chart 35
VOLUMES OF ORGANIC FRESH AND DRIED FRUITS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY
2018 AND 2019
TONNES



Source: compiled by SINAB based on data provided by SIB

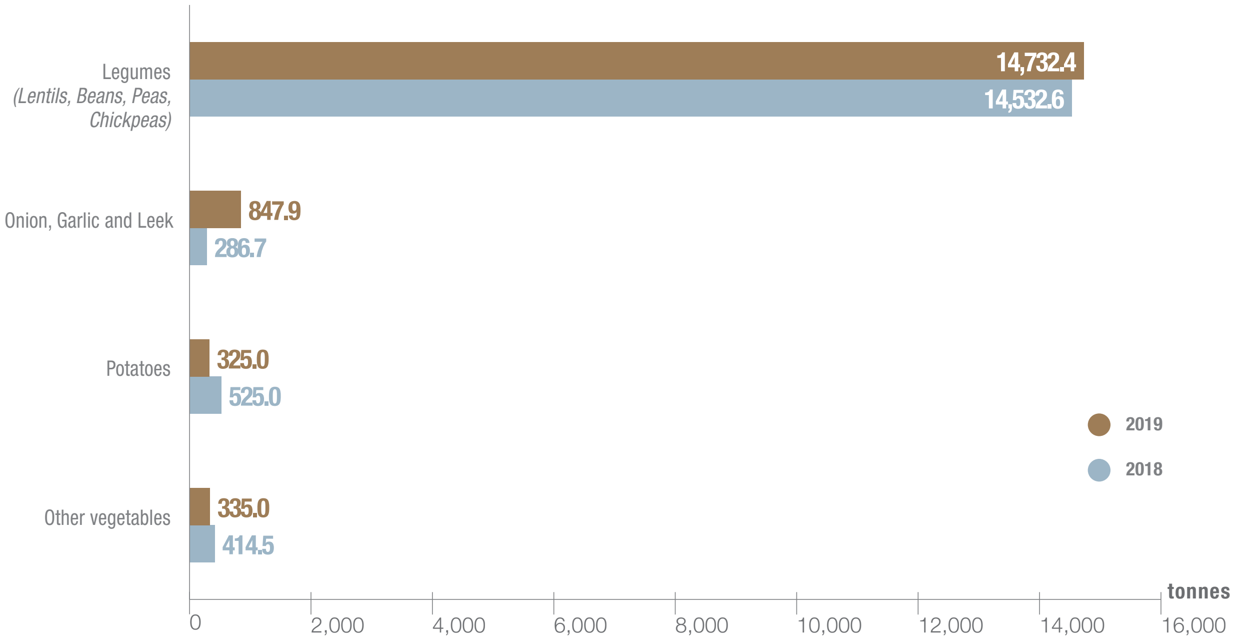
Table 15
VOLUMES OF ORGANIC FRESH AND DRIED FRUITS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY AND COUNTRY OF ORIGIN
2019
TONNES

Geographical area	Country	Bananas	Nuts	Dates, figs, pineapples	Grapes	Apples and pears	Other fresh fruit	Frozen fruit	Total fruit
Africa	Algeria	-	-	20.7	-	-	-	-	20.7
	Burkina Faso	-	8.3	46.3	-	-	-	-	54.6
	Egypt	-	-	8.7	-	-	-	-	8.7
	Ghana	-	5.6	3.0	-	-	-	-	8.6
	Ivory Coast	-	60.8	-	-	-	-	-	60.8
	Senegal	-	25.2	-	-	-	-	-	25.2
	South Africa	-	-	-	-	-	16.7	-	16.7
	Togo	-	-	17.7	-	-	-	-	17.7
	Tunisia	-	-	181.2	-	-	-	-	181.2
	Uganda	-	0.1	-	-	-	-	-	0.1
Asia	Azerbaijan	-	60.0	-	-	-	-	-	60.0
	China	-	95.0	-	-	-	-	-	95.0
	Georgia	-	62.0	-	-	-	-	-	62.0
	India	-	34.8	-	-	-	-	-	34.8
	Indonesia	-	0.1	-	-	-	-	-	0.1
	Israel	-	-	149.3	-	-	-	-	149.3
	Philippines	60.0	108.4	-	-	-	-	-	168.4
	Sri Lanka	-	45.9	0.5	-	-	-	-	46.4
	Vietnam	-	135.7	-	-	-	-	-	135.7
Central America	Costa Rica	-	-	746.7	-	-	-	-	746.7
	Dominican Republic	3,935.6	-	-	-	-	-	-	3,935.6
Non-EU Europe	Albania	-	307.0	-	-	-	-	132.6	439.6
	Belarus	-	-	-	-	-	-	18.3	18.3
	Bosnia and Herzegovina	-	7.0	-	-	-	1.8	-	8.8
	Moldova	-	271.6	-	-	-	-	-	271.6
	Serbia	-	0.3	-	-	-	-	217.5	217.8
	Switzerland	-	15.0	-	-	-	-	-	15.0
	Turkey	-	1,148.9	207.7	755.3	-	-	531.9	2,643.8
	Ukraine	-	152.0	-	-	-	-	651.2	803.2
North America	Canada	-	-	-	-	-	20.4	23.1	43.5
	Mexico	-	10.9	-	-	-	-	-	10.9
	United States	-	97.3	-	-	-	-	-	97.3
South America	Argentina	-	288.0	-	-	1,040.7	98.0	-	1,426.7
	Bolivia	-	121.9	-	-	-	-	-	121.9
	Brazil	-	526.9	-	-	-	-	3.7	530.6
	Chili	-	80.0	-	-	-	691.8	-	771.8
	Colombia	1,582.4	0.3	7.7	-	-	-	-	1,590.4
	Ecuador	13,882.9	-	-	-	-	-	-	13,882.9
	Peru	6,786.3	27.4	88.7	-	-	120.0	-	7,022.5
Oceania	New Zealand	-	-	-	-	-	100.0	-	100.0
Total		26,247.1	3,696.5	1,478.3	755.3	539.0	1,550.4	1,578.3	35,845.0

Source: compiled by SINAB based on data provided by SIB

VEGETABLES AND LEGUMES

Chart 36
VOLUMES OF ORGANIC VEGETABLES AND LEGUMES IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY
2018 AND 2019
TONNES



Source: compiled by SINAB based on data provided by SIB

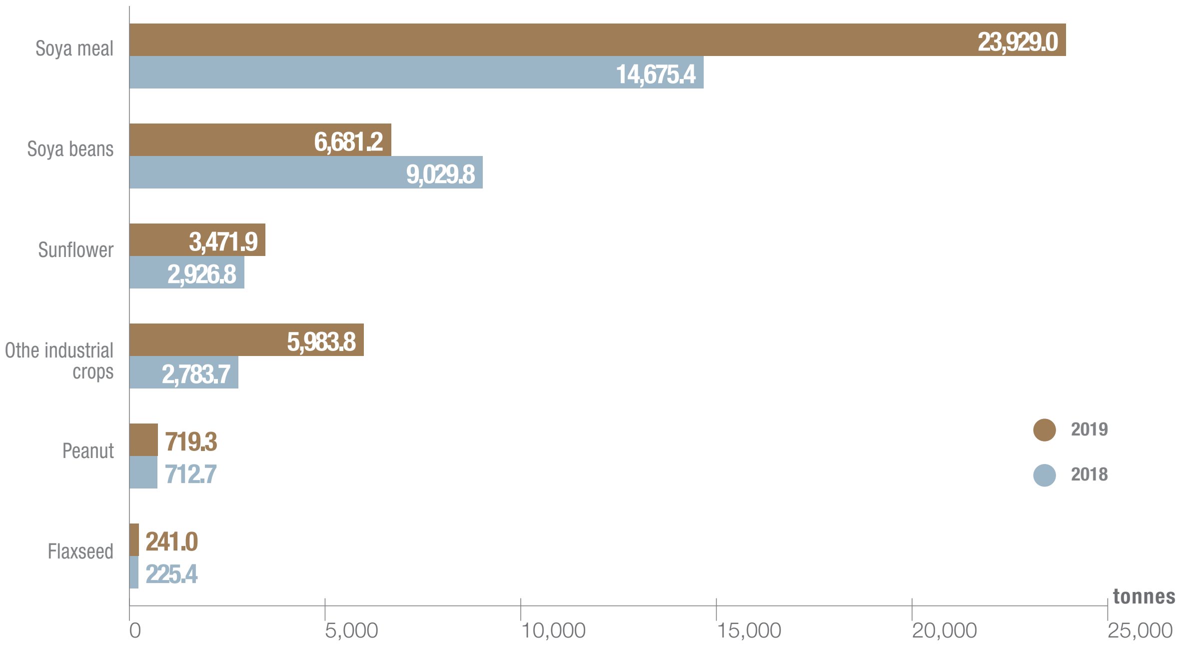
Table 16
VOLUMES OF ORGANIC VEGETABLES AND LEGUMES IMPORTED TO ITALY FROM THIRD COUNTRIES BY PRODUCT CATEGORY AND COUNTRY OF ORIGIN
2019
TONNES

Geographical area	Country	Potatoes	Onion, shallot, garlic, and leek	Legumes	Vegetables	Total vegetables and legumes
Africa	Egypt	325.0	540.0	51.0	-	916.0
Asia	China	-	-	7,397.9	48.0	7,445.9
	India	-	-	140.2	-	140.2
	Japan	-	-	0.0	-	0.0
	Kazakhstan	-	-	378.0	-	378.0
Non-EU Europe	Moldova	-	-	484.0	-	484.0
	Montenegro	-	-	5.0	-	5.0
	Serbia	-	-	0.7	0.9	1.6
	Switzerland	-	-	0.7	-	0.7
	Turkey	-	-	5,547.5	142.1	5,689.6
	Ukraine	-	-	322.0	-	322.0
North America	Canada	-	-	141.2	-	141.2
	United States	-	-	220.0	144.0	364.0
South America	Argentina	-	307.9	44.0	-	351.9
Total		325.0	847.9	14,732.4	335.0	16,240.3

Source: compiled by SINAB based on data provided by SIB

INDUSTRIAL CROPS

Chart 37
VOLUMES OF ORGANIC INDUSTRIAL CROPS IMPORTED TO ITALY FROM THIRD COUNTRIES BY PRODUCT CATEGORY
2018 AND 2019
TONNES



Source: compiled by SINAB based on data provided by SIB

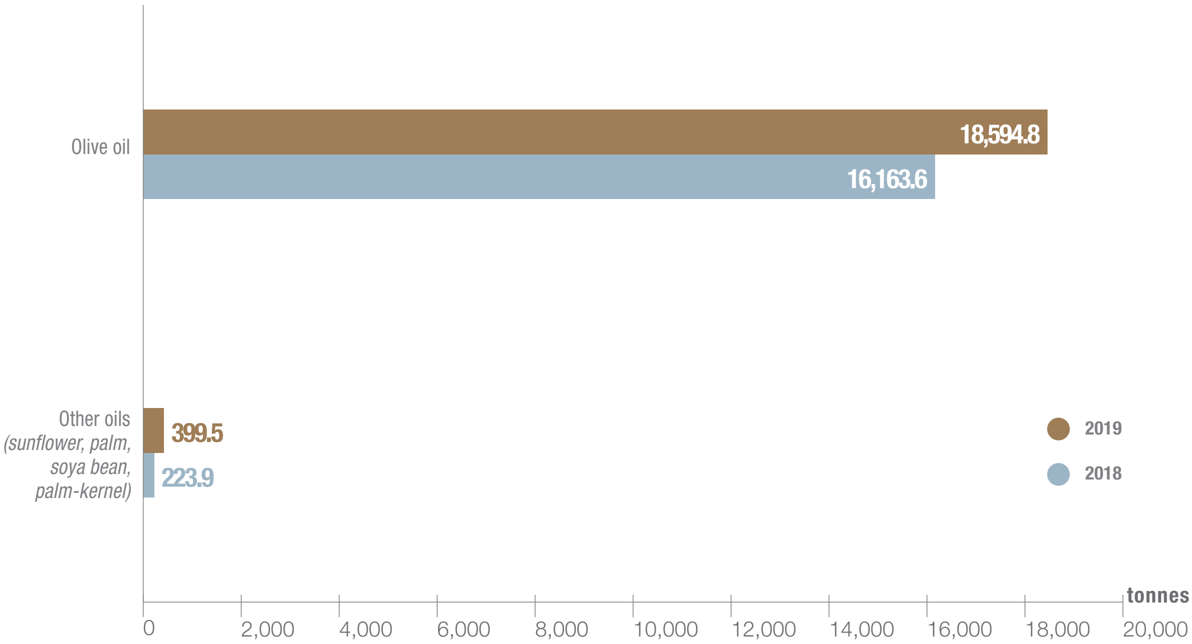
Table 17
VOLUMES OF ORGANIC INDUSTRIAL CROPS IMPORTED TO ITALY FROM THIRD COUNTRIES BY PRODUCT CATEGORY AND COUNTRY OF ORIGIN
2019
TONNES

Geographical area	Country	Soya bean	Soya meal	Peanut	Flaxseeds	Sunflower seeds	Other industrial crops	Total Industrial crops
Africa	Egypt	-	-	660.8	-	-	93.8	**754.6**
	Kenya	-	-	-	-	-	1.8	**1.8**
	Morocco	-	-	-	-	-	572.4	**572.4**
	Namibia	-	-	-	-	-	3.0	**3.0**
	South Africa	-	-	-	-	-	1.3	**1.3**
	Togo	3,056.5	-	-	-	-	-	**3,056.5**
	Tunisia	-	-	-	-	-	81.0	**81.0**
Asia	China	517.7	23,757.4	58.5	23.0	205.0	3,384.5	**27,946.1**
	India	-	-	-	80.0	-	434.7	**514.7**
	Japan	-	-	-	-	-	2.6	**2.6**
Non-EU Europe	Albania	-	-	-	-	-	6.8	**6.8**
	Bosnia and Herzegovina	-	-	-	-	-	7.2	**7.2**
	Moldova	-	-	-	-	406.0	-	**406.0**
	Serbia	-	-	-	-	681.8	0.6	**682.4**
	Switzerland	-	171.6	-	-	-	-	**171.6**
	Turkey	-	-	-	138.0	-	126.5	**264.5**
	Ukraine	3,086.6	-	-	-	2,179.1	1,078.0	**6,343.7**
North America	Canada	20.4	-	-	-	-	102.0	**122.4**
	Mexico	-	-	-	-	-	3.8	**3.8**
	United States	-	-	-	-	-	0.2	**0.2**
South America	Argentina	-	-	-	-	-	21.5	**21.5**
	Bolivia	-	-	-	-	-	0.5	**0.5**
	Paraguay	-	-	-	-	-	60.0	**60.0**
	Peru	-	-	-	-	-	1.6	**1.6**
Total		**6,681.2**	**23,929.0**	**719.3**	**241.0**	**3,471.9**	**5,983.8**	**41,026.2**

Source: compiled by SINAB based on data provided by SIB

VEGETABLE OILS AND FATS

Chart 38
VOLUMES OF ORGANIC VEGETABLE OILS AND FATS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY
2018 AND 2019
TONNES



Source: compiled by SINAB based on data provided by SIB

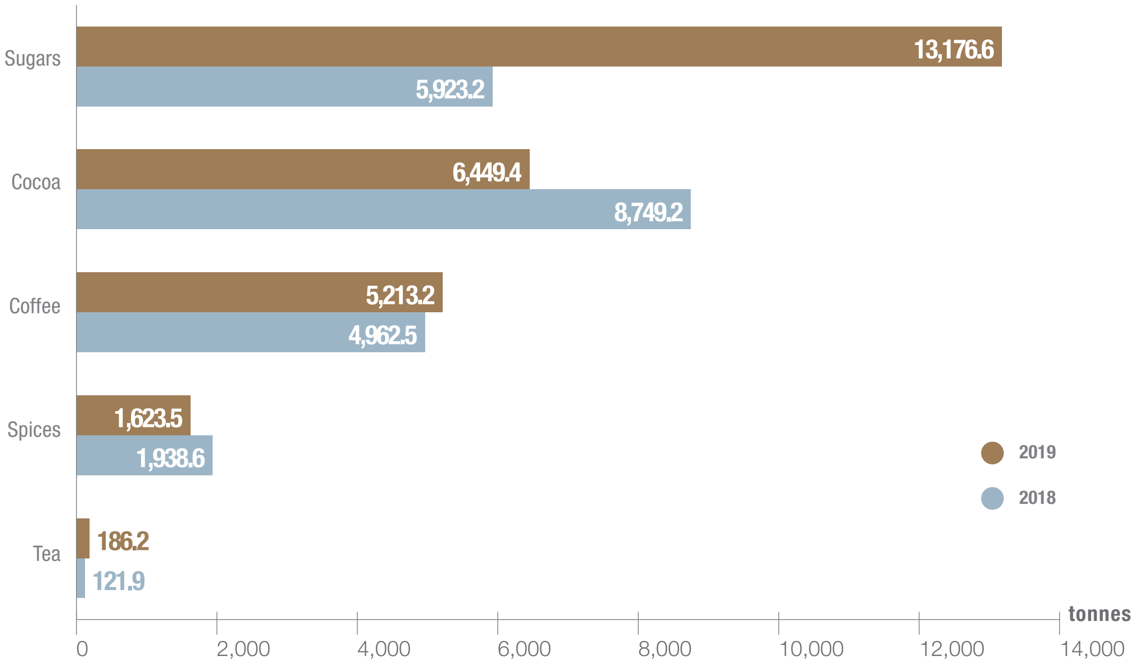
Table 18
VOLUMES OF ORGANIC VEGETABLE OILS AND FATS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY AND COUNTRY OF ORIGIN
2019
TONNES

Geographical area	Country	Olive oil	Other oils	Total vegetable oils and fats
Africa	Ivory Coast	-	87.0	87.0
	Morocco	-	7.4	7.4
	Tunisia	18,593.7	-	18,593.7
Asia	China	-	18.3	18.3
	India	-	24,5	24.5
	Israel	1.1	-	1.1
	Philippines	-	12.8	12.8
	Sri Lanka	-	133.3	133.3
	Thailand	-	0.1	0.1
Central America	Dominican Republic	-	46.4	46.4
Non-EU Europe	Switzerland	-	1.9	1.9
North America	United States	-	45.7	45.7
South America	Brazil	-	21.0	21.0
	Chile	-	1.0	1.0
	Peru	-	0.1	0.1
Total		18,408.9	585.4	18,994.3

Source: compiled by SINAB based on data provided by SIB

COFFEE, COCOA SUGAR, TEA, AND SPICES

Chart 39
VOLUMES OF ORGANIC COFFEE, COCOA, SUGAR, TEA, AND SPICES IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY
2018 AND 2019
TONNES



Source: compiled by SINAB based on data provided by SIB

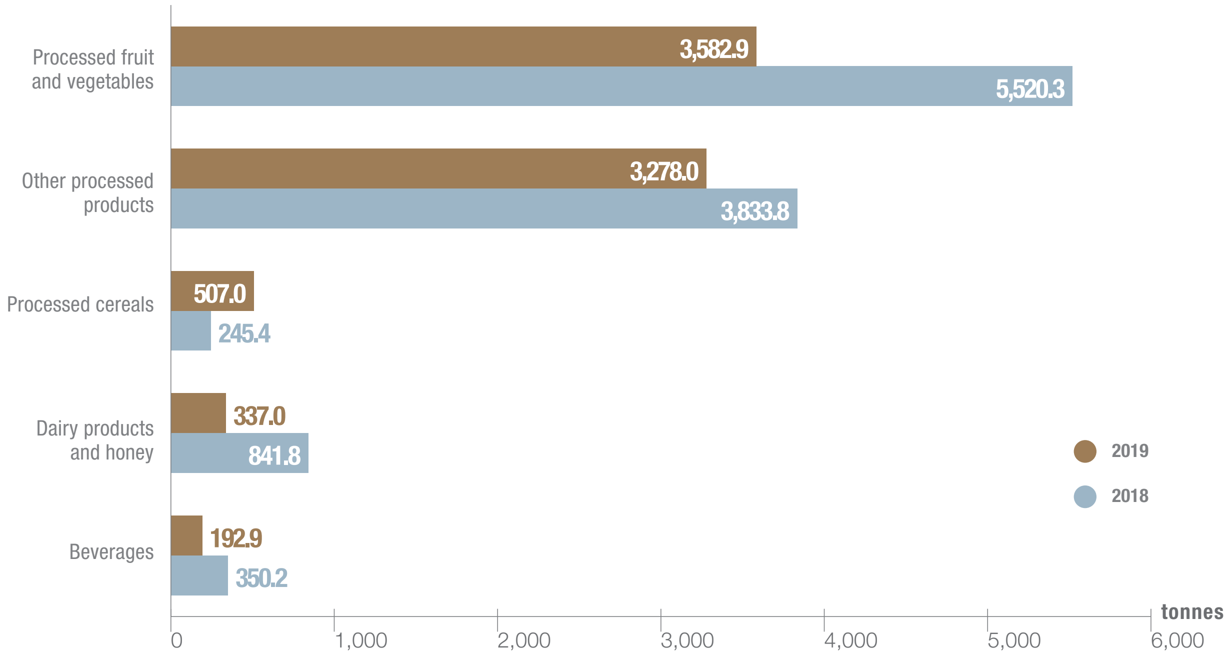
Table 19
VOLUMES OF ORGANIC COFFEE, COCOA, SUGAR, TEA, AND SPICES IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY AND COUNTRY OF ORIGIN
2019
TONNES

Geographical area	Country	Coffee	Tea	Spices	Sugars	Cocoa	Total Coffee, Cocoa, Sugars, Tea and Spices
Africa	DR Congo	76.8	-	-	-	400.0	476.8
	Egypt	-	-	15.3	-	-	15.3
	Ethiopia	216.0	-	-	-	-	216.0
	Ivory Coast	-	-	-	-	100.0	100.0
	Madagascar	-	-	15.3	-	125.0	140.3
	Morocco	-	-	0.0	-	-	0.0
	South Africa	-	0.8	-	-	-	0.8
	Tanzania	59.0	-	-	-	100.0	159.0
	Uganda	322.6	-	-	-	1,066.0	1,388.6
Asia	China	-	2.7	250.1	17.2	-	269.9
	India	338.9	156.0	196.2	1,476.0	-	2,167.0
	Indonesia	-	-	1.0	15.0	-	16.0
	Iran	-	-	0.0	-	-	0.0
	Japan	-	24.4	-	-	-	24.4
	Pakistan	-	-	-	283.5	-	283.5
	Philippines	-	-	-	542.3	-	542.3
	Sri Lanka	-	2.3	0.3	-	-	2.6
	Taiwan	-	0.1	-	-	-	0.1
	Thailand	-	-	-	48.0	-	48.0
Central America	Costa Rica	-	-	-	40.0	-	40.0
	Dominican Republic	2.8	-	-	-	490.0	492.8
	Guatemala	78.1	-	-	115.2	-	193.3
	Honduras	1,973.4	-	-	-	0.0	1,973.4
	Nicaragua	350.2	-	-	-	-	350.2
Non-EU Europe	Bosnia and Herzegovina	-	-	3.0	-	-	3.0
	Northern Macedonia	-	-	2.5	-	-	2.5
	San Marino	-	-	-	-	4.0	4.0
	Switzerland	17.4	-	0.7	2.0	302.2	322.3
	Turkey	-	-	1.5	-	-	1.5
North America	Canada	0.9	-	-	5,488.6	-	5,489.5
	Mexico	375.0	-	-	256.3	-	631.3
	United States	-	-	-	6.8	-	6.8
Oceania	New Zealand	-	-	-	0.0	-	0.0
South America	Argentina	-	-	-	105.0	-	105.0
	Bolivia	-	-	-	-	17.5	17.5
	Brazil	105.3	-	4.0	562.4	-	671.7
	Colombia	189.6	-	-	1,230.6	-	1,420.3
	Ecuador	-	-	-	355.7	707.1	1,062.8
	Paraguay	-	-	-	1,600.1	-	1,600.1
	Peru	1,107.0	-	1,133.6	1,031.8	3,137.6	6,410.1
Total		5,213.2	186.2	1,623.5	13,176.6	6,449.4	26,648.8

Source: compiled by SINAB based on data provided by SIB

OTHER PROCESSED PRODUCTS

Chart 40
VOLUMES OF OTHER ORGANIC PROCESSED PRODUCTS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY
2018 AND 2019
TONNES



Source: compiled by SINAB based on data provided by SIB

Table 20
VOLUMES OF ORGANIC PROCESSED PRODUCTS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY AND COUNTRY OF ORIGIN
2019
TONNES

Geographical area	Country	Processed fruit and vegetables	Processed cereals	Dairy products and honey	Beverages	Other processed products	Total processed products
Africa	Egypt	1.8	-	-	-	-	1.8
	Ghana	51.9	-	-	-	-	51.9
	Ivory Coast	-	-	-	-	92.0	92.0
	Mali	299.2	-	-	-	-	299.2
	Morocco	-	-	-	-	49.2	49.2
	South Africa	316.8	-	-	-	8.0	324.8
	Sudan	-	-	-	-	20.0	20.0
	Tanzania	-	-	20.5	-	-	20.5
Asia	Cambodia	-	-	-	-	30.9	30.9
	China	39.8	-	0.5	-	525.6	565.9
	India	73.9	-	-	-	67.7	141.6
	Israel	38.2	73.3	-	-	2.5	113.9
	Japan	5.4	9.6	-	4.2	85.1	104.3
	Pakistan	-	-	-	-	44.3	44.3
	Philippines	136.0	-	-	-	-	136.0
	Sri Lanka	53.0	-	-	-	931.2	984.2
	Thailand	3.8	4.1	-	-	279.6	287.4
	Vietnam	-	-	-	-	4.0	4.0
Central America	Costa Rica	1.8	-	-	-	-	1.8
Non-EU Europe	Albania	-	-	-	-	15.6	15.6
	Bosnia and Herzegovina	37.9	-	-	-	-	37.9
	Norway	-	-	-	-	87.4	87.4
	Serbia	2.2	-	-	-	-	2.2
	Switzerland	41.9	332.9	177.0	4.2	179.9	735.8
	Turkey	1,223.1	87.2	-	-	7.0	1,317.3
North America	Canada	59.6	-	-	3.9	-	63.5
	Mexico	638.2	-	103.9	-	277.8	1,019.8
	United States	79.8	-	-	-	17.7	97.5
Oceania	New Zealand	-	-	0.3	-	-	0.3
South America	Argentina	-	-	13.5	139.4	3.6	156.5
	Brazil	416.6	-	21.4	5.2	67.9	511.1
	Chile	9.6	-	-	36.2	-	45.8
	Colombia	0.4	-	-	-	-	0.4
	Ecuador	25.6	-	-	-	-	25.6
	Paraguay	26.5	-	-	-	25.1	51.6
	Peru	-	-	-	-	338.0	338.0
	Uruguay	-	-	-	-	118.1	118.1
Total		3,582.9	507.0	337.0	192.9	3,278.0	7,897.9

Source: compiled by SINAB based on data provided by SIB

sinab

Via XX Settembre, 20
00187 Roma
Tel: +39 06 4665 6085
Email: sportelloinfo@sinab.it
Web: www.sinab.it

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mipaaf
ministero delle politiche agricole alimentari e forestali

ismea

CIHEAM BARI