ministero delle politiche agricole alimentari, forestali e del turismo

CIHEAM BARI

FACTS AND FIGURES ON ORGANIC FARMING IN ITALY 2018

THEMATIC VOLUME 2

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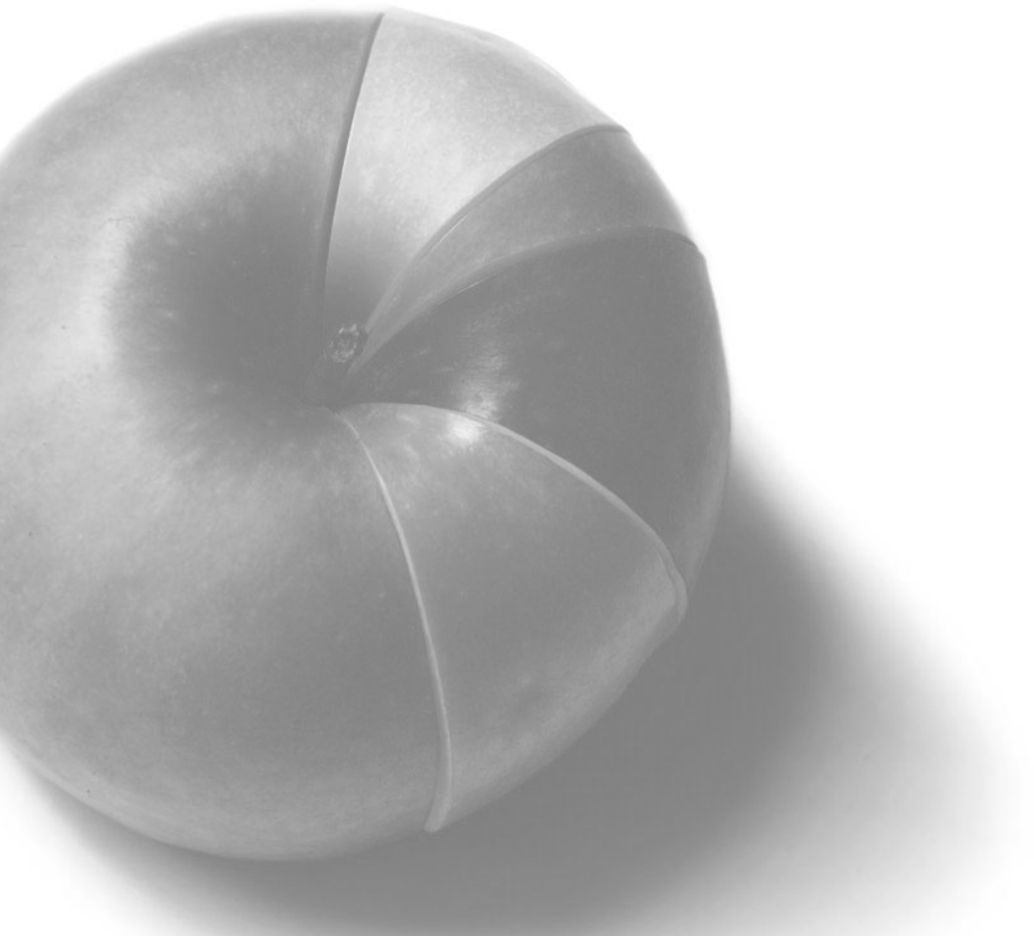

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FOREWORD

"Facts and Figures on Organic Farming in Italy 2018" is the second 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, Forestry Policies and Tourism, 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 more volumes present, 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.

AREAS, OPERATORS AND CROPS

FIGURES ON ORGANIC FARMING

Data
MiPAAFT
Ministry of Agriculture, Food, Forestry Policies and Tourism

Source
Control Bodies
Regions and SIB (Organic Information System)

Data processed by
SINAB
National Information System on Organic Farming
Delizia Del Bello
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Since 2010, the area under organic farming in Italy has increased by almost 800,000 hectares. The comparison between 2017 and 2010 shows an increase of 71% in organic areas and of 59% in organic operators **(Chart 3)**. Data as at 31 december 2017 confirm the sector growth, maintaining positive trend.

Based on SINAB estimates, in 2017 the cultivated areas in Italy exceeded 1.9 million hectares, with a 6.3% growth compared to 2016. Overall, in 2017, more than 110,000 hectares were farmed organically **(Table 1)**.

Grassland (544,049 ha), Plants harvested green (376,573 ha) and cereals (305,871 ha) represent the main Italian organic farming crops. These categories are followed, according to size, by areas planted with olive trees (235,741 ha) and vineyards (105,384 ha).

Compared to 2016, it is worth noting that some crops have increased: common wheat and spelt (+22.6), vegetables (+25.4%) - a sector where areas under tomato have reached 6,241 ha, with a 53.8% growth of nuts (+16.7%) and temperate fruit (+10.9%), while the growth of wine grapes was more limited (only 1.9%) **(Tables 1 and 2)**.

As regards the regional distribution of organic areas, the largest surface area was reported in Sicily, with 427,294 ha, followed by Apulia with 252,341 ha, and Calabria with 202,119 ha. The organic area in these three Regions accounts for 46% of the whole national organic area, confirming the value of 2016. Compared to 2016, only Sicily continues to grow (with an increase of 17.5%), while Apulia and Calabria show a slight decrease **(Tables 3 and 4)**.

Emilia-Romagna ranking among the top five Italian Regions (based on surface area) with a total of 134,509 ha, and the performance of Lombardy, which is the region that grows the most with +21.4% **(Tables 3 and 4)**, are two key points that indicate how organic plant production is attracting growing interest also from the North of the country.

As of 31 december 2017, 75,873 holdings were included in the Italian organic agriculture certification system, which means a 5.2% increase compared to 2016. These figures can be broken down as follows: 57,370 exclusive producers (farmers), 3.2% more than 2016; 8,689 exclusive processors (involved in preserving/processing and marketing, also including retail sales), gaining an additional 14.6%; 9,403 producers/processors (carrying out production, processing and marketing activities), that grew by 8.8%; 411 importers (who can also be producers and processors), with a 13.2% increase compared to 2016 **(Table 5)**.

The Regions that continue to keep the lead of the number of operators, even in 2017, are all located in the South: Sicily (11,626 operators, with a 1.5% increase), Calabria (11,167 operators, with a slight decline of 1.4%, despite the sharp increase recorded in 2016), and Apulia (9,378 operators, with a situation comparable to that in Calabria, showing a 6.5% decrease despite an increase of 50% in 2016) **(Table 6)**.

National data (ISTAT FSS 2013) on the percentage incidence of organic farming indicate that organic agriculture accounted for 15.4% of the Italian UAA in 2017, given that it gained one point more compared to 2016 **(Table 7)**.

Processing of area data by geographical location shows that every 100 hectares of UAA, about 20 hectares are organically farmed in the Centre, the South and the Islands, while the organic UAA does not exceed 7 hectares in the North.

On the other hand, organic farms in Italy account for 4.5% of the total number of all agricultural holdings: this incidence is fairly homogeneous across the country and remains substantially stable compared to 2016 **(Table 7)**.

The percentage of organic farms on the total (4.5%) is lower than the percentage of organic land on the total UAA (15.4%), because the average farm size is very high in organic agriculture **(Chart 4)**. The average size of an organic farm in Italy in 2017 was 29 ha, compared with the national average of 8,4 ha for conventional holdings.

The data presented were compiled by the National Information System on Organic Farming - SINAB, a project funded by the Ministry of Agriculture, Food, Forestry Policies and Tourism (MiPAAFT) and managed by ISMEA and CIHEAM Bari - on the basis of the figures provided by the Control Bodies, the Regions and the Organic Information System (SIB) up until 31 december 2017.

Table 1
AREAS AND CROP TYPES IN ORGANIC FARMING AS AT 31 DECEMBER 2017
IN HECTARES

	Under conversion 2017	Organic 2017	TOTAL 2017	TOTAL as at 31 december 2016	2017 – 2016 (% change)
TOTAL - CROPS	**536,314**	**1,372,340**	**1,908,653**	**1,796,363**	**6.3**
Cereals	90,466	215,405	305,871	299,639	2.1
Dried pulses and protein crops for grain production	13,516	36,214	49,730	43,986	13.1
Root crops	608	1,199	1,807	1,582	14.2
Industrial crops	9,185	20,001	29,186	25,278	15.5
Plants harvested green	97,786	278,787	376,573	342,653	9.9
Other arable land crops	6,540	14,644	21,185	18,106	17.0
Vegetables*	16,872	38,184	55,056	43,914	25.4
Fruit**	11,078	22,683	3,761	29,920	12.8
Nuts	12,877	34,575	47,452	40,665	16.7
Citrus fruit	7,795	31,861	39,656	36,125	9.8
Vineyards	34,593	70,791	105,384	103,545	1.8
Olives	63,510	172,232	235,741	222,452	6.0
Other permanent crops	1,252	3,650	4,902	16,296	-69.9
Permanent grassland (excl. rough grazing)	110,099	280,784	390,883	321,011	21.8
Rough grazing	39,566	113,599	153,166	185,142	-17.3
Fallow land	20,572	37,729	58,301	66,047	-11.7
Other categories not included in the total: not grazed forest and/or wild collection areas (mushrooms, truffles, wild berries) notified by the operator; other.	93,347	166,531	259,878	176,628	47.1

** “Strawberries” and “cultivated mushrooms” are included in vegetables*

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

Table 2
DETAILS OF MAIN CROPS
IN HECTARES

	Area under conversion 2017	Organic area 2017	TOTAL 2017	TOTAL 2016	2017 – 2016 (% change)
Cereals for grain production (inc. seeds)	**90,466**	**215,405**	**305,871**	**299,639**	**2.1**
Wheat total	49,811	130,154	**179,964**	179,753	**0.1**
Durum wheat	37,636	90,302	**127,938**	137,321	**-6.8**
Common wheat and spelt	12,174	39,851	**52,026**	42,432	**22.6**
Rye	69	324	**393**	284	**38.5**
Barley	12,433	27,223	**39,657**	33,720	**17.6**
Oats	6,325	15,246	**21,571**	21,781	**-1.0**
Grain maize	5,824	9,566	**15,390**	12,203	**26.1**
Triticale	1,034	2,991	**4,025**	4,300	**-6.4**
Other cereals	10,408	19,056	**29,464**	30,997	**-4.9**
Rice	4,562	10,845	**15,407**	16,602	**-7.2**
Root crops	**608**	**1,199**	**1,807**	**1,582**	**14.2**
Potatoes (incl. early and seed potatoes)	454	851	**1,305**	1,189	**9.8**
Sugar beet (excl. seeds)	59	20	**79**	46	**72.0**
Other root crops	96	327	**423**	348	**21.7**
Industrial crops	**9,185**	**20,001**	**29,186**	**25,278**	**15.5**
Oil seeds total	6,998	14,770	**21,768**	16,133	**34.9**
Sunflower seed	2,594	5,475	**8,069**	6,028	**33.9**
Soya	3,579	5,628	**9,207**	8,354	**10.2**
Rape and turnip rape	420	1,625	**2,045**	614	**233.3**
Linseed	297	1,882	**2,179**	1,034	**110.7**
Other oil seeds	108	160	**268**	103	**160.0**
Tobacco	67	37	**104**	136	**-23.5**
Hops	3	5	**8**	3	**135.0**
Textile crops total	159	270	**429**	237	**80.9**
Cotton	0	0	**0**	1	**-100.0**
Other textile crops	159	270	**429**	237	**81.4**
Aromatic plants, medicinal and culinary plants	1,523	3,682	**5,205**	5,368	**-3.0**
Other industrial crops	435	1,236	**1,671**	3,401	**-50.9**
Plants harvested green	**97,786**	**278,787**	**376,573**	**342,653**	**9.9**
Annual plants harvested green - Total	21,364	57,578	**78,941**	72,505	**8.9**
Green maize	1,086	1,222	**2,308**	1,586	**45.5**
Other annual plants harvested green	20,277	56,356	**76,633**	70,919	**8.1**
Temporary grasses and grazings	28,500	87,475	**115,974**	94,773	**22.4**
Other plants harvested green	47,922	133,735	**181,657**	175,375	**3.6**
Lucerne (Alfalfa)	29,630	83,395	**113,024**	99,766	**13.3**
Other	18,293	50,340	**68,633**	75,609	**-9.2**
Fresh vegetables, melons, strawberries, cultivated mushrooms	**16,872**	**38,184**	**55,056**	**43,914**	**25.4**

Table 2
DETAILS OF MAIN CROPS
IN HECTARES

	Area under conversion 2017	Organic area 2017	TOTAL 2017	TOTAL 2016	2017 – 2016 (% change)
All brassicas (excl. roots)	1,731	4,545	6,276	3,146	99.5
Cauliflower and broccoli	848	2,139	2,987	1,707	75.0
Cabbage (white)	489	1,256	1,745	700	149.2
Other brassicas	394	1,150	1,544	739	109.1
Leafy or stalk vegetables (excl. brassicas)	3,255	5,558	8,814	6,761	30.4
Celery	20	68	88	67	31.5
Leaks	19	74	93	99	-5.5
Lettuces	100	273	373	307	21.4
Endives	156	144	299	254	17.9
Spinach	250	501	751	692	8.4
Asparagus	646	1,044	1,690	1,263	33.8
Chicory	423	505	928	284	226.8
Artichokes	462	720	1,181	1,235	-4.3
Other leafy or stalk vegetables (excl. brassicas)	1,180	2,230	3,411	2,561	33.2
Vegetables cultivated for fruit	2,857	7,287	10,144	9,141	11.0
Tomatoes	1,876	4,365	6,241	4,057	53.8
Cucumbers	7	27	35	36	-4.9
Gherkins	0	0	0	0	-
Melons	249	746	995	967	2.9
Water melons	85	185	270	350	-22.9
Other vegetables cultivated for fruit	639	1,964	2,604	3,731	-30.2
Root tuber and bulb vegetables	507	1,656	2,163	1,792	20.7
Carrots	175	692	867	836	3.7
Garlic	44	115	159	141	12.2
Onions	231	433	663	559	18.7
Shallots	1	13	14	10	32.0
Other root tuber and bulb vegetables	57	404	460	246	87.4
Pulses	6,503	15,503	22,006	18,877	16.6
Peas	2,043	3,846	5,889	5,574	5.7
Beans	546	912	1,458	1,101	32.4
Other pulses	3,914	10,744	14,658	12,203	20.1
Other vegetables	1,897	3,419	5,316	3,929	35.3
Strawberries	92	162	255	239	6.7
Cultivated mushrooms	30	54	84	29	186.1
Fruit *	**11,078**	**22,683**	**33,761**	**29,920**	**12.8**
Fruit of temperate climate zones	**8,226**	**16,601**	**24,827**	**22,378**	**10.9**

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

Table 2
DETAILS OF MAIN CROPS
IN HECTARES

	Area under conversion 2017	Organic area 2017	TOTAL 2017	TOTAL 2016	2017 – 2016 (% change)
Apples	2,311	3,890	6,201	5,182	19.7
Pears	679	1,354	2,033	1,732	17.4
Peaches	783	1,453	2,236	1,907	17.3
Apricots	867	2,115	2,982	2,675	11.5
Nectarines	129	196	325	386	-15.8
Cherries	1,091	2,819	3,910	3,749	4.3
Plums	286	941	1,227	686	78.7
Other fruit of temperate climate zones	2,078	3,833	5,911	6,061	-2.5
Berries (soft fruit)	**183**	**332**	**515**	**450**	**14.4**
Black currents	18	31	49	47	5.6
Raspberries	41	77	119	109	8.5
Other berries	124	223	347	294	18.0
Fruit of subtropical climate zones	**2,668**	**5,750**	**8,419**	**7,092**	**18.7**
Figs	208	349	557	528	5.5
Kiwis	1,852	3,584	5,437	4,718	15.2
Avocados	7	57	64	58	10.9
Bananas	0	0	0	0	-40.3
Other fruit of subtropical climate zones	601	1,760	2,361	1,788	32.0
Nuts	**12,877**	**34,575**	**47,452**	**40,665**	**16.7**
Walnuts	501	982	1,483	1,308	13.3
Hazel nuts	3,599	8,700	12,299	10,122	21.5
Almonds	4,085	13,405	17,491	13,985	25.1
Chestnuts	4,423	10,925	15,348	14,215	8.0
Other nuts	269	563	832	1,035	-19.6
Citrus fruit	**7,795**	**31,861**	**39,656**	**36,125**	**9.8**
Pomelos and grapefruit	19	90	108	127	-14.5
Lemons and acid limes	1,687	6,295	7,982	7,343	8.7
Oranges	4,127	16,824	20,951	18,218	15.0
Other citrus fruit (small citrus fruit)	1,962	8,652	10,614	10,437	1.7
Vineyards	**34,593**	**70,791**	**105,384**	**103,545**	**1.8**
Wine grape vineyards	33,782	69,425	103,207	101,289	1.9
Table grape vineyards	810	1,367	2,177	2,257	-3.5
Vineyards for raisin production	0	0	0	0	-
Olives	**63,510**	**172,232**	**235,741**	**222,452**	**6.0**
Table olives	277	702	979	799	22.5
Oil olives	63,233	171,529	234,762	221,653	5.9

Table 3
REGIONAL AREA DISTRIBUTION: % CHANGE 2017 - 2016
IN HECTARES

	TOTAL as at 31 december 2016	TOTAL as at 31 december 2017	2017 – 2016 (% change)
Total	**1,796,363**	**1,908,653**	**6.3**
Sicily	363,688	427,294	17.5
Apulia	255,853	252,341	-1.4
Calabria	204,527	202,119	-1.2
Latium	132,923	138,278	4.0
Emilia-Romagna	117,290	134,509	14.7
Sardinia	140,648	132,188	-6.0
Tuscany	131,003	130,115	-0.7
Basilicata	95,371	102,070	7.0
Marche	78,408	87,341	11.4
Campania	46,758	52,649	12.6
Piedmont	45,732	46,580	1.9
Lombardy	37,210	45,176	21.4
Umbria	37,994	43,540	14.6
Abruzzo	38,369	38,758	1.0
Veneto	23,654	27,979	18.3
Friuli Venezia Giulia	14,016	15,418	10.0
Molise	11,104	10,735	-3.3
A.P. Bolzano	8,362	9,209	10.1
A.P. Trento	6,337	4,869	-23.2
Liguria	3,910	4,309	10.2
Aosta Valley	3,206	3,178	-0.9

Chart 1
CHANGE IN ORGANIC AREAS BY REGION
COMPARISON 2017 – 2016

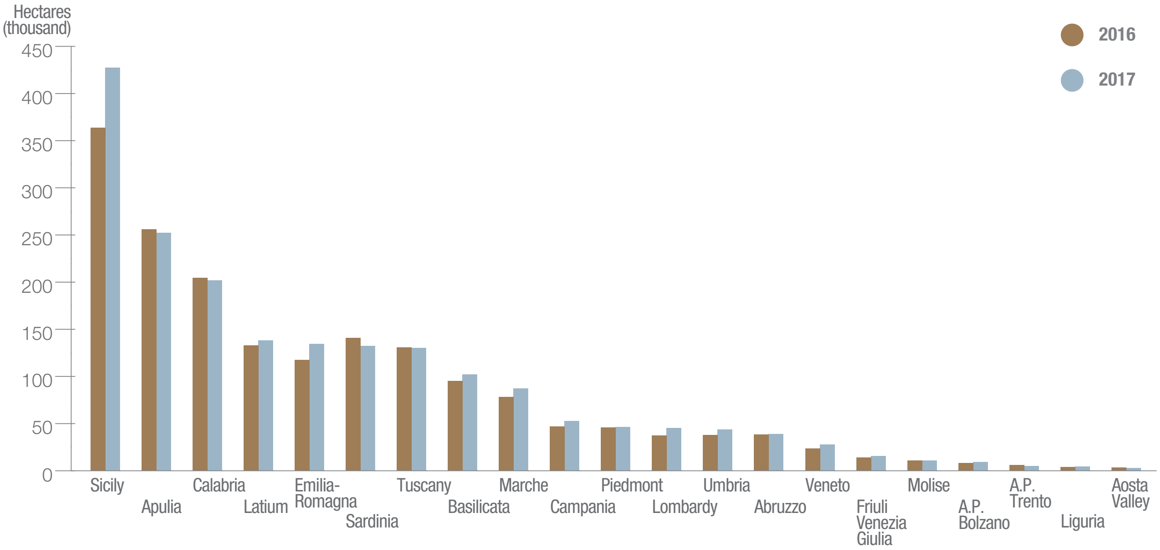


Table 4
REGIONAL AREA DISTRIBUTION BY CROP TYPE (HECTARES)
YEAR 2017

	Cereals	Protein crops*	Root crops	Industrial crops	Plants harvested green	Other arable land crops	Vegetables **	Fruit***	Nuts	Citrus fruit	Vineyards	Olives	Crops total
Italy	**305,871**	**49,730**	**1,807**	**29,186**	**376,573**	**21,185**	**55,056**	**33,761**	**47,452**	**39,656**	**105,384**	**235,741**	**1,908,653**
Sicily	57,881	15,406	123	760	69,232	3,544	6,048	4,261	14,425	25,339	35,939	42,101	**427,294**
Apulia	52,659	10,124	174	3,160	27,588	5,382	13,515	6,165	7,053	1,868	16,327	7,590	**252,341**
Calabria	16,908	1,325	120	505	33,375	4,697	1,654	3,501	2,731	11,208	4,443	67,482	**202,119**
Latium	14,822	1,748	133	917	39,327	810	3,670	2,434	8,268	18	2,453	8,665	**138,278**
Emilia-Romagna	26,853	1,279	356	3,820	53,993	1,161	6,229	2,683	1,409	2	3,704	779	**134,509**
Sardinia	4,710	186	32	245	22,743	435	687	255	197	70	1,611	3,752	**132,188**
Tuscany	23,242	2,620	217	3,041	38,969	779	3,861	1,018	1,140	19	13,477	14,478	**130,115**
Basilicata	34,175	9,753	7	1,092	17,834	160	3,286	1,747	367	991	993	5,522	**102,070**
Marche	17,245	3,689	95	3,629	23,750	1,801	4,119	405	192	0	5,325	2,562	**87,341**
Campania	6,401	1,125	30	352	8,796	358	3,062	2,023	7,699	123	1,505	7,156	**52,649**
Piedmont	11,170	456	78	2,041	5,101	270	1,499	2,437	2,855	15	3,331	111	**46,580**
Lombardy	19,127	384	39	2,713	9,044	291	2,391	548	79	0	3,680	314	**45,176**
Umbria	6,001	655	28	1,574	7,630	182	1,343	207	499	0	915	5,469	**43,540**
Abruzzo	4,062	380	192	307	8,139	393	1,163	199	110	2	3,955	3,183	**38,758**
Veneto	6,358	28	94	3,300	4,598	74	1,236	2,487	154	0	4,728	305	**27,979**
Friuli Venezia Giulia	1,565	18	11	904	2,530	712	391	308	44	0	1,127	46	**15,418**
Molise	2,533	555	2	678	2,883	68	694	236	101	0	440	893	**10,735**
A.P. Bolzano	79	0	66	14	138	1	52	2,202	19	0	441	4	**9,209**
A.P. Trento	43	0	3	31	77	14	94	596	32	0	921	68	**4,869**
Liguria	32	0	4	106	90	31	56	41	75	1	41	263	**4,309**
Aosta Valley	6	0	2	1	734	22	5	7	2	0	28	0	**3,178**

**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)*

Table 5
OPERATORS CHANGE BY CATEGORY
COMPARISON 2017 – 2016

	2016	2017	2017 – 2016 (% change)
Exclusive producers	55,567	57,370	3.2
Exclusive processors*	7,581	8,689	14.6
Producers/ Processors	8,643	9,403	8.8
Importers**	363	411	13.2
Operators total	72,154	75,873	5.2

** 'processors' include operators who carry out preserving and processing activities*
***'Importers' include importers who also carry out production and preserving/ processing activities* (Source: SIB)

Table 6
NUMBER OF OPERATORS BY TYPE AND REGION
% CHANGE 2017 – 2016

	Exclusive producers	Producers / Processors	Exclusive processors	Importers*	Total as at 31 december 2016	Total as at 31 december 2017	2017 – 2016 (% change)
Italy	57,370	9,403	8,689	411	72,154	75,873	5.2
Sicily	9,385	1,327	896	18	11,451	11,626	1.5
Calabria	9,812	1,040	310	5	11,330	11,167	-1.4
Apulia**	7,331	1,199	839	9	10,029	9,378	-6.5
Tuscany**	2,962	1,478	671	30	5,004	5,141	2.7
Emilia-Romagna**	3,361	553	954	72	4,571	4,940	8.1
Latium	3,690	492	468	14	4,118	4,664	13.3
Campania	3,386	340	467	22	3,719	4,215	13.3
Veneto**	2,045	471	985	55	2,715	3,556	31.0
Marche**	2,494	286	264	7	2,638	3,051	15.7
Piedmont**	1,812	503	536	55	2,803	2,906	3.7
Lombardy**	1,258	443	881	79	2,235	2,661	19.1
Basilicata	2,038	107	90	-	2,254	2,235	-0.8
Sardinia	1,852	131	112	-	2,230	2,095	-6.1
Umbria**	1,333	307	176	8	1,217	1,824	49.9
Abruzzo	1,324	225	246	4	1,788	1,799	0.6
A.P. Bolzano	1,010	164	279	11	1,280	1,464	14.4
A.P. Trento	968	113	137	2	929	1,220	31.3
Friuli Venezia Giulia	632	102	149	7	854	890	4.2
Molise	375	33	66	-	452	474	4.9
Liguria	231	75	151	13	444	470	5.9
Aosta Valley	71	14	12	-	93	97	4.3

**"Importers" include importers who also carry out production and preserving/processing activities* (Source: SIB)
***Data are provided by the Regional Authorities*

Chart 2
CHANGE IN OPERATORS' NUMBER BY REGION
COMPARISON 2017 – 2016

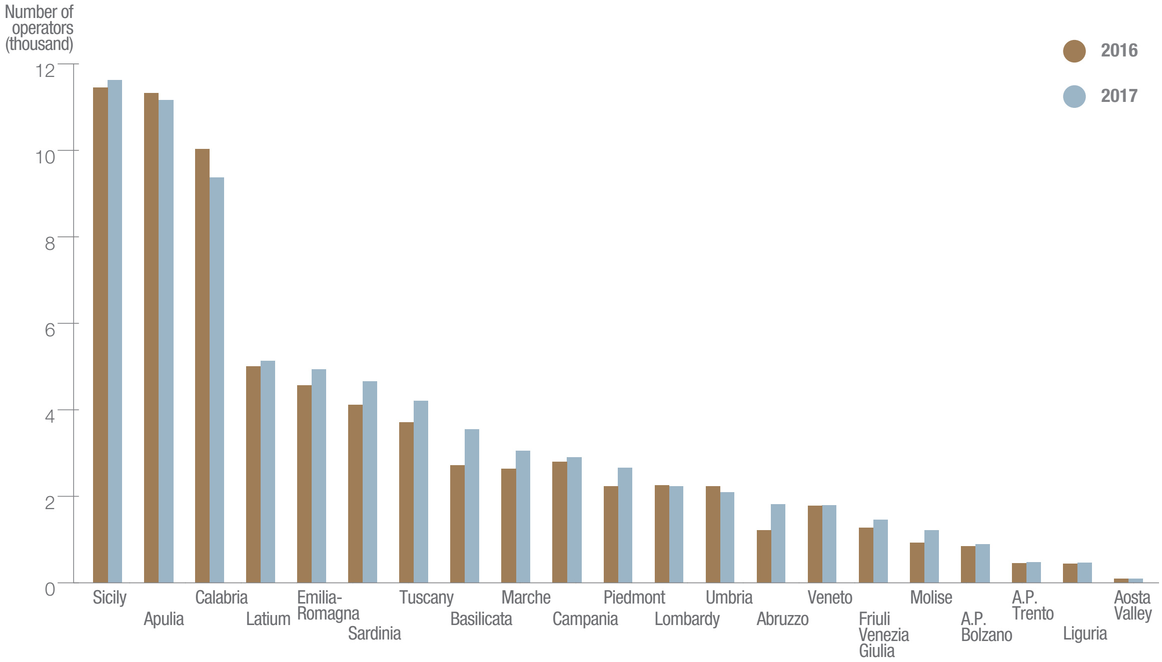


Chart 3
HISTORICAL TREND OF OPERATORS AND SURFACE AREAS IN ITALY
FROM 1990 TO 2017 (ABSOLUTE VALUES)

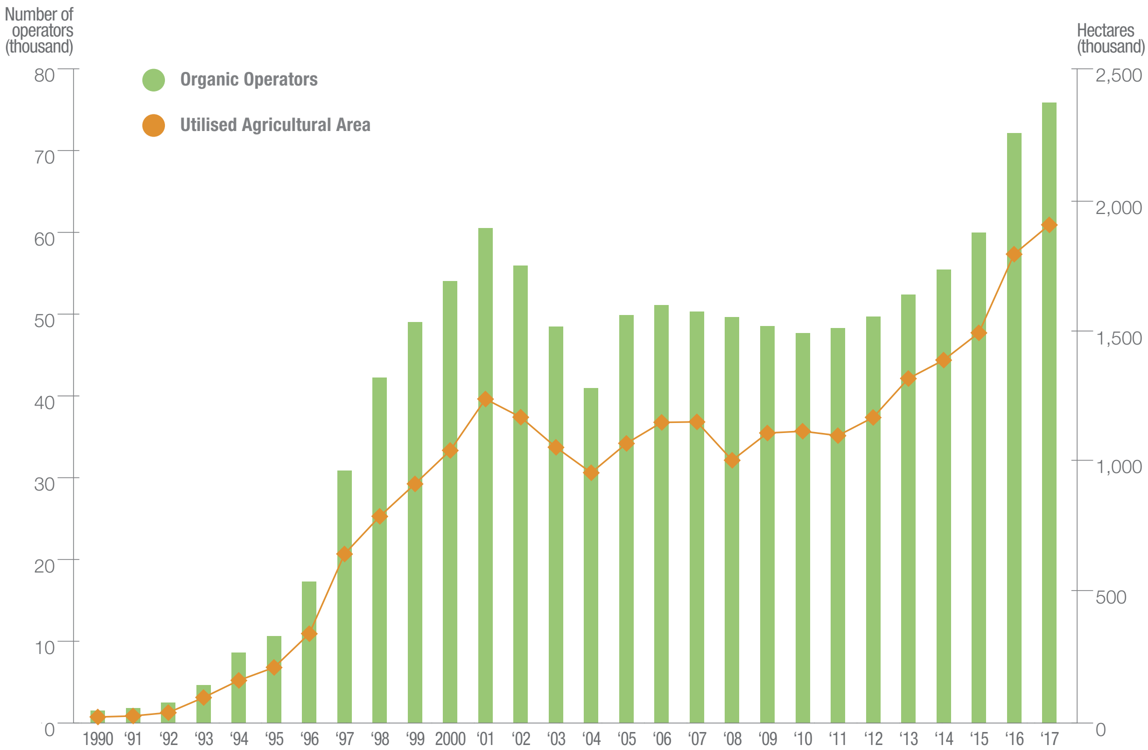


Table 7
PERCENTAGE INCIDENCE OF ORGANIC AGRICULTURAL HOLDINGS AND ORGANIC AREAS AT 31 DECEMBER 2017 ON TOTAL FARMS AND CULTIVATED AREAS BY GEOGRAPHICAL REGION (ISTAT FSS 2013)

	% Organic area	% Organic agricultural holdingsas
Italy	**15.4**	**4.5**
North	**6.6**	**3.9**
North-West	**5.0**	**3.4**
Piedmont	4.9	3.9
Aosta Valley	6.0	3.0
Liguria	10.3	1.9
Lombardy	4.9	3.5
North-East	**7.9**	**4.1**
A.P. Bolzano	4.0	6.1
A.P. Trento	3.6	7.0
Veneto	3.4	2.3
Friuli Venezia Giulia	7.2	3.6
Emilia-Romagna	13.0	6.1
Centre	**19.4**	**5.8**
Tuscany	18.4	6.7
Umbria	14.2	4.8
Marche	19.5	6.8
Latium	23.3	5.1
South	**19.1**	**4.3**
Abruzzo	8.8	2.5
Molise	6.1	1.9
Campania	9.7	3.2
Apulia	20.2	3.3
Basilicata	20.6	4.6
Calabria	37.4	8.4
Islands	**22.2**	**5.0**
Sicily	31.1	5.3
Sardinia	11.6	3.8

Chart 4
AVERAGE FARM SIZE BY GEOGRAPHICAL AREA (IN HECTARES)
ISTAT FSS 2013 FOR NATIONAL DATA
SINAB 2017 FOR ORGANIC DATA

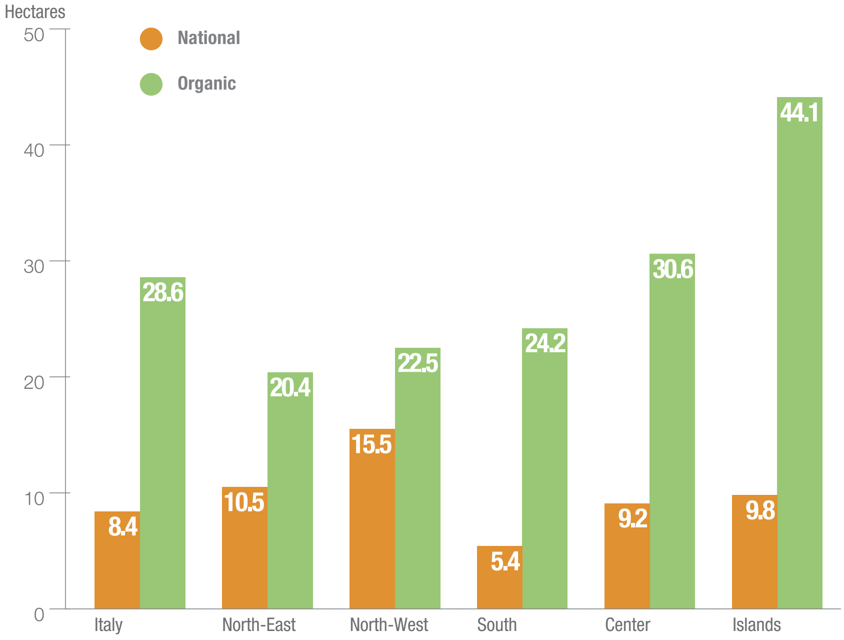


Table 8
ANIMAL HUSBANDRY
NUMBER OF LIVE ANIMALS AS AT 31 DECEMBER

	2015	2016	2017	2017 – 2016 (% change)
Bovine animals	266,576	331,431	336,278	1.5
Porcine animals	49,909	56,567	61,242	8.3
Ovine animals	785,170	776,454	736,502	-5.1
Caprine animals	100,852	113,983	115,590	1.4
Poultry	4,126,584	4,636,012	3,027,154	-34.7
Equine animals	14,349	15,691	15,293	-2.5
Bees (No of apiaries)	195,341	170,343	171,094	0.4

Table 9
ORGANIC AQUACULTURE FARMS
YEARS 2016 AND 2017

	2016	2017
Italy	**40**	**40**
Veneto	15	15
Emilia-Romagna	15	11
Apulia	3	2
Friuli Venezia Giulia	1	2
Lombardy	1	2
Sardinia	1	1
Calabria	1	1
Trentino Alto Adige	1	1
Umbria	1	1
Campania	0	1
Latium	0	1
Marche	0	1
Piedmont	1	0

Source: SIB

MARKET
AND CONSUMPTION

FIGURES ON ORGANIC FARMING

Data
ISMEA
Istituto di Servizi per il Mercato Agricolo Alimentare

Source
ISMEA DB and Nielsen DB

Data processed by
ISMEA
Istituto di Servizi per il Mercato Agricolo Alimentare
Riccardo Meo
Antonella Giuliano

Organics in the food department

The annual report on consumption of organic products does not reveal unexpected findings for 2018: the sector has consolidated its weight in the Italian consumer agri-food spend.

Sales of organic products continue to grow all over the country with a +4% increase compared to last year. ISMEA estimates, which do not include monitoring of Ho.Re.Ca channels, public canteens and the export value, confirm that the organic market is nearing EUR 2.5 billion, with a turnover increase for the surveyed segments of about EUR 100 million compared to 2017.

The incidence of certified products in the Italian consumer shopping basket, amounting to 3%, is also the same.

The main categories of organic spend

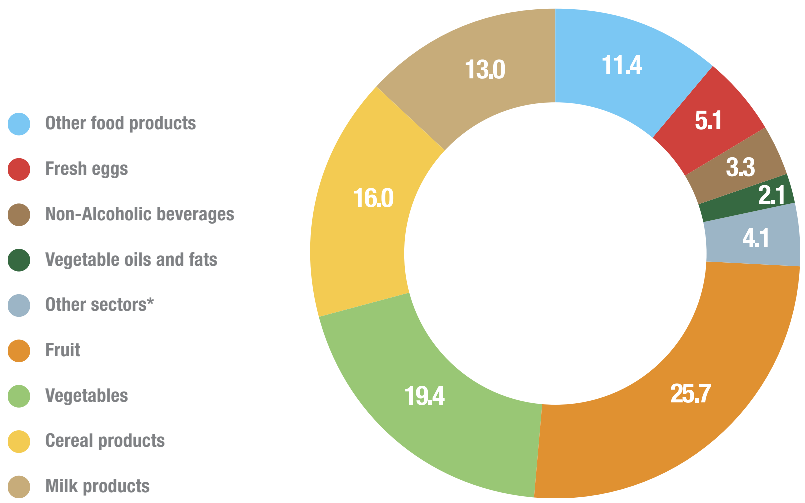
Compared to 2017, the distribution of sales by purchase category remains unchanged.

Fruit and vegetables are the agri-food segment where spending is highest. Cereal products follow, with organic pasta driving the sector, and then breakfast cereals and organic cookies.

The purchase share of milk, yoghurt, cheese and other milk products is stable at 13%.

Excellent results are reported for the consumption of eggs, a category that in the organic shopping basket weighs more than 5% compared to 1% totaled by the conventional agri-food produce.

Chart 1
DISTRIBUTION OF CONSUMPTION OF ORGANIC PRODUCTS BROKEN DOWN IN MAIN CATEGORIES %



** Other segments include: Meat, Fish, Honey, Charcuterie, Beer, Wines and Sparkling Wines and Other Alcoholic Beverages*
Source: ISMEA- Nielsen based on mixed methods surveys (RMS-CPS)

The same holds true for honey, while the incidence of organic wine is still low (1.3%) although, in terms of turnover, annual growth exceeded 40%.

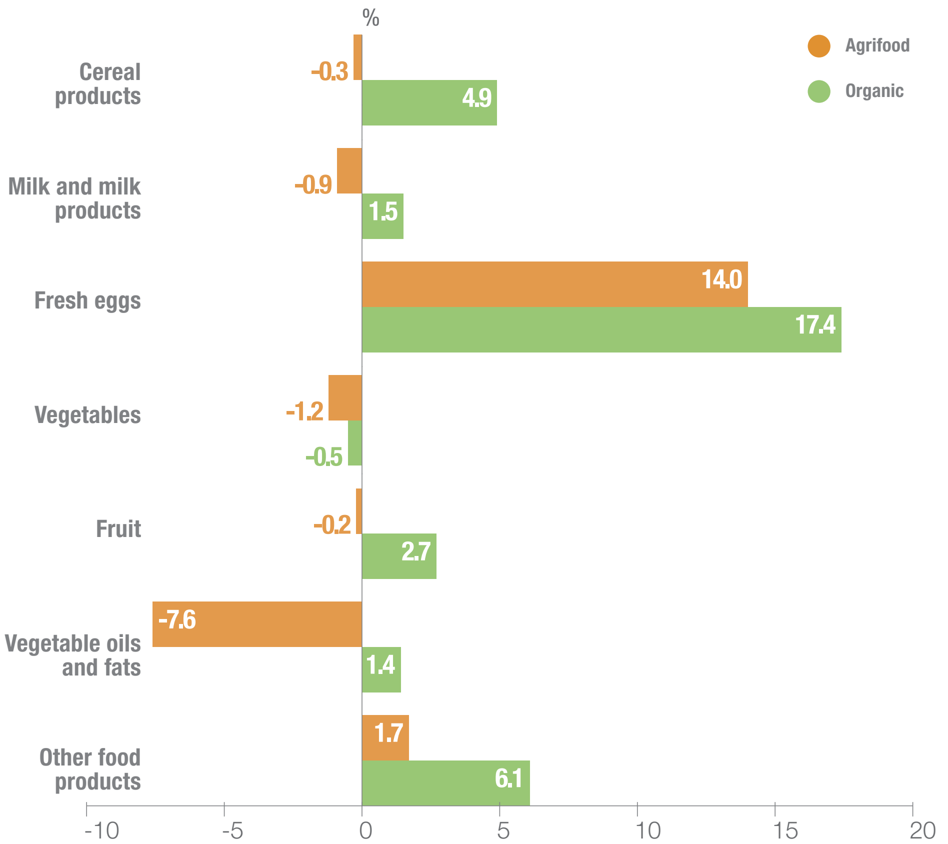
The wine industry dynamics are complex and "non-organic" consumption also includes types of commodities (e.g. bulk wine and wine in cartons) which are not currently available in the organic sector.

On the other hand, organic certification still struggles to gain ground in the meat sector, where products sold loose over the counter are hardly monitored by the consumption survey system, and supply shortage and inadequate product promotion are known to persist.

A distinction should be made for organic poultry meat, a sector that is being better organized along the supply chain, distributing fairly the greater added value of the certified product to all actors involved and effectively promoting the packaged product in Italy and abroad

The agri-food industry's performance for 2018 (+1.5%) is a counterbalance to ISTAT's preliminary estimates that point to a recession in the Country. In this context, the organic sector is doing even better. In addition to the final figure of +4%, the individual categories, compared to their conventional counterparts **(Chart 2)**, show positive growth trends (except for the slight drop in vegetables caused by a supply shortage due to the unfavourable crop season in 2018).

Chart 2
ORGANIC AND NON-ORGANIC PRODUCT CONSUMPTION
ITALY % CHANGE IN 2018/2017



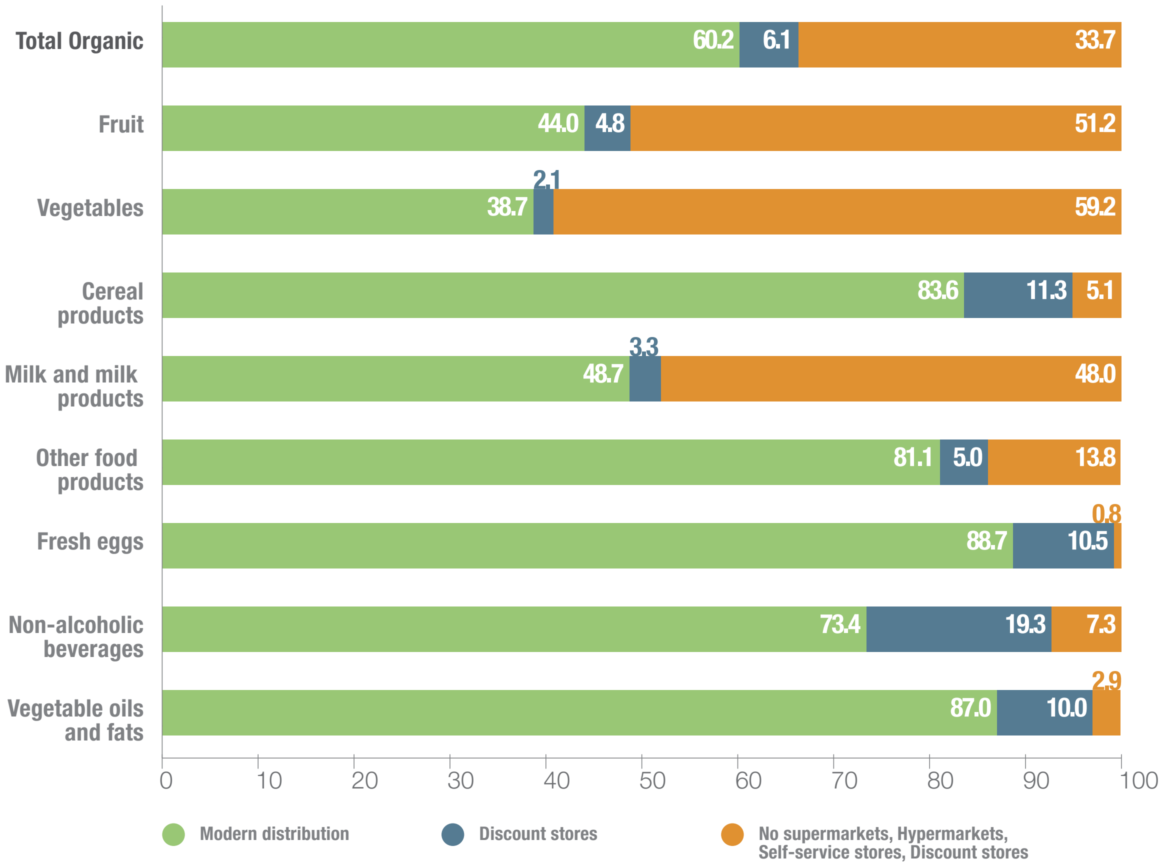
Source: ISMEA-Nielsen based on mixed methods surveys (RMS-CPS)

Organic distribution channels

When breaking down consumption distribution into various sales channels, large-scale retailing proves to be the main outlet for organic products.

A trend towards purchasing behaviour that favours shopping time-saving and convenience offered by the large-scale retail trade over the specialised retail trade is therefore expected, despite the latter's wider range and assortment.

Chart 3
DISTRIBUTION OF ORGANIC PRODUCT SALES BY TYPES OF SALES CHANNELS AND CATEGORY
ITALY 2018



Source: ISMEA- Nielsen based on mixed methods surveys (RMS-CPS)

In 2018, sales in large-scale retail trade exceeded 60% of total turnover (in 2017, the incidence of modern distribution was 58.5%), but also purchases from discount stores grew, although these stores remain the least representative distribution channel, mainly due to their limited array of products and brands. Specialized stores and, more generally, all the other distribution channels that are not part of the retail sector lose market share (-3.2%) and turnover (-5%).

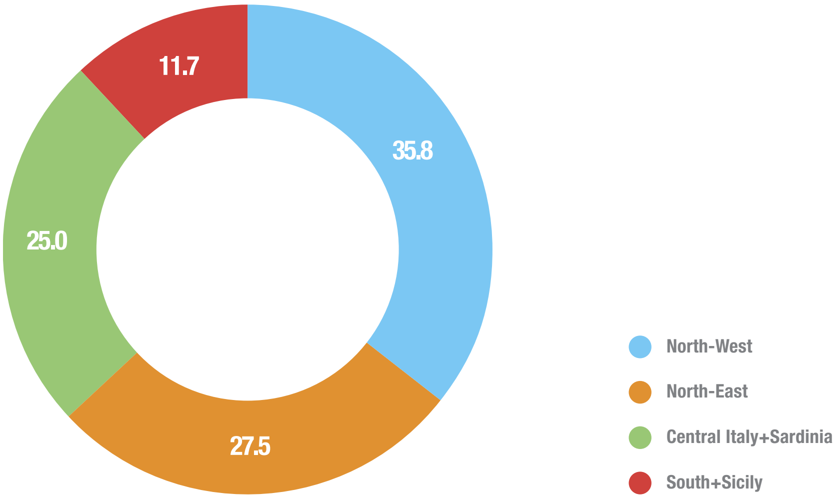
The downturn can be seen in all product categories, even if the specialised stores maintain their leadership in fresh products, for which the consumer has greater expectations and is more demanding in terms of quality assurance.

A snapshot of the Italian market

The Italian consumption distribution has not fluctuated in 2018. **Chart 4** shows the same sales proportions as in the previous two years.

In fact, despite the efforts made with the rural development promotion tools and through several communication campaigns, organic consumption remains concentrated in the North of the country.

Chart 4
DISTRIBUTION OF ORGANIC SALES IN LARGE-SCALE RETAIL TRADE BY GEOGRAPHICAL AREAS (%)
ITALY 2018

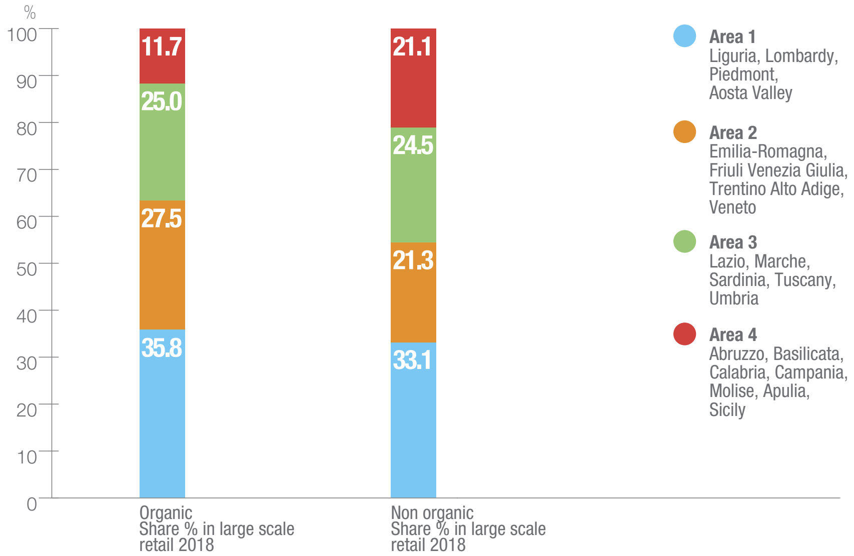


Source: ISMEA-Nielsen Panel on Retail

More specifically, the North-West regions, driven by Lombardy, take the lion's share with over 35% of sales in large-scale retailing.

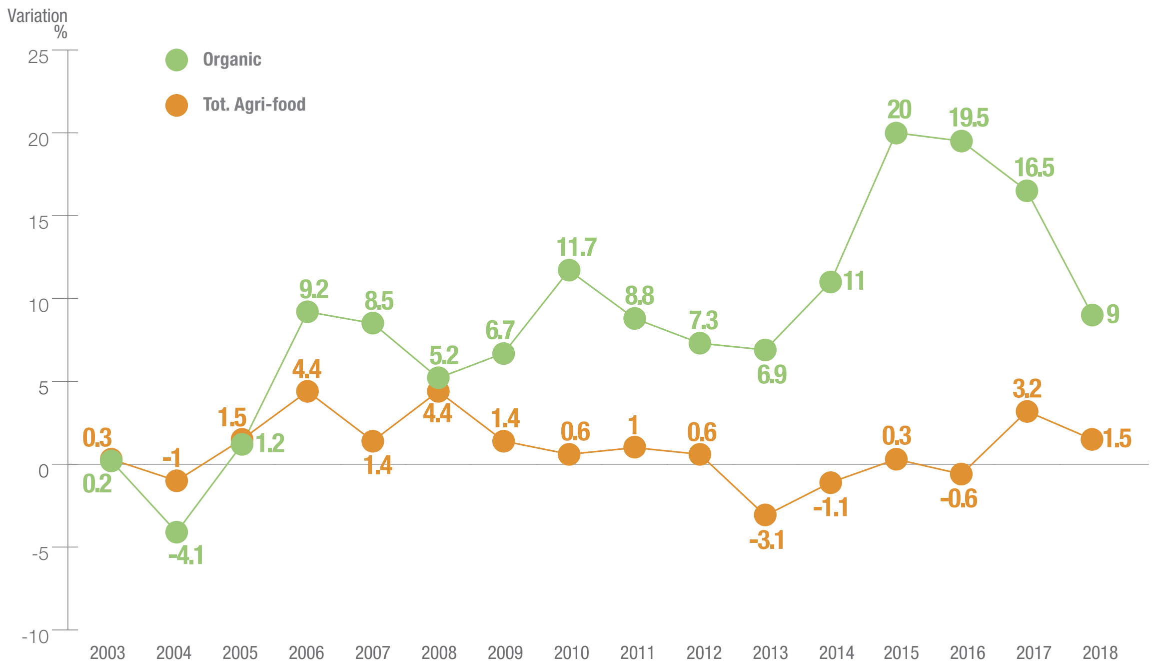
The other northern regions, those in Central Italy and in the South follow far behind, with a market share of around 10% (11.7% for Abruzzo, Basilicata, Calabria, Campania, Molise, Apulia and Sicily in 2018). Organic consumption stagnation in the South is caused by a number of negative factors, mainly the low consumer purchasing power and the offer that is often unstructured and inadequate for modern distribution.

Chart 5
DISTRIBUTION OF ORGANIC PRODUCT SALES IN LARGE-SCALE RETAIL TRADE BY GEOGRAPHICAL AREAS AND COMPARISON WITH "NON-ORGANIC" AGRI-FOODSTUFFS
ITALY 2018



Source: ISMEA-Nielsen Panel on Retail

Chart 6
ORGANIC CONSUMPTION IN LARGE-SCALE RETAIL VALUE AND COMPARISON WITH THE AGRI-FOOD SECTOR
ITALY ANNUAL % CHANGE IN 2018



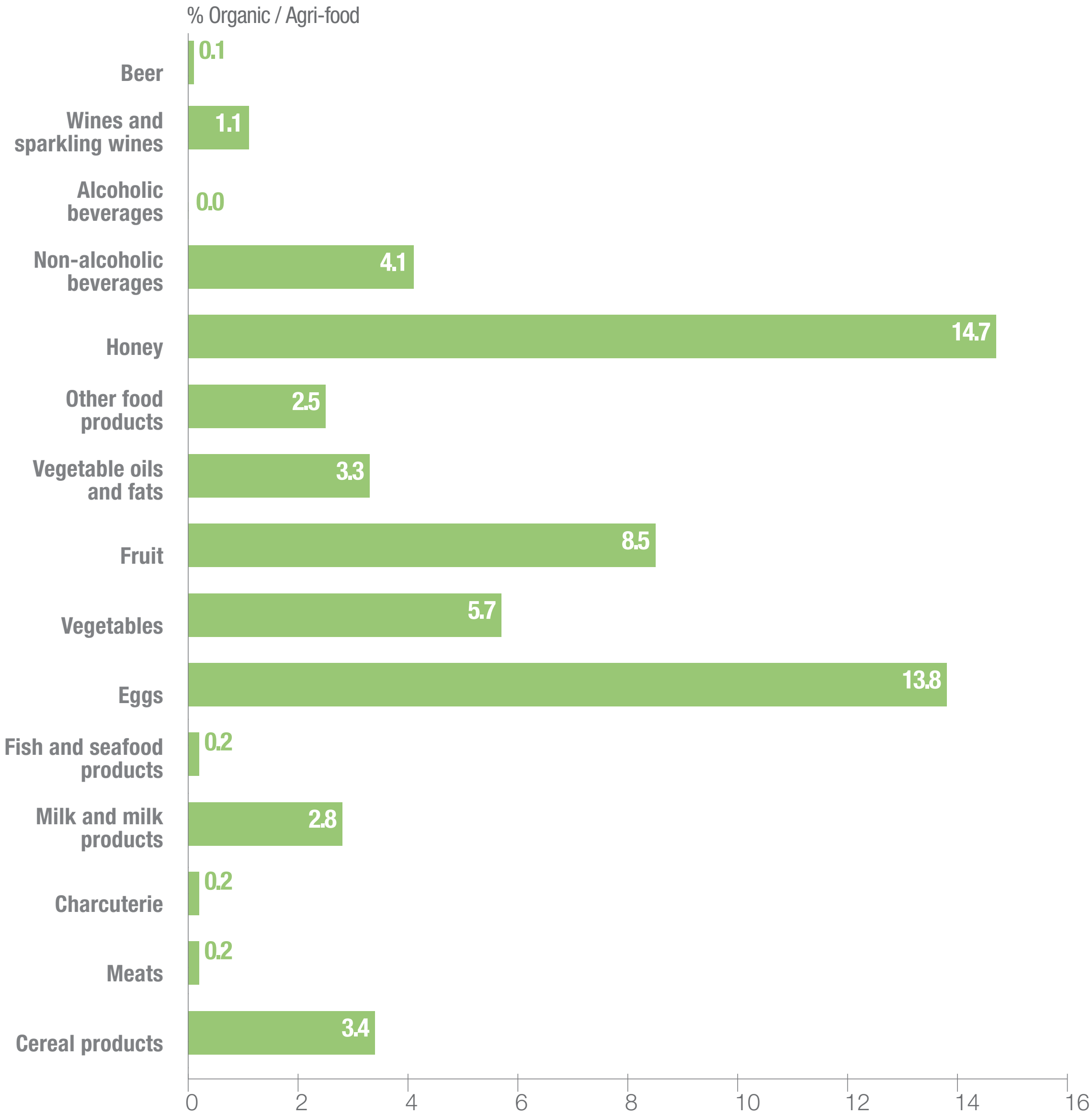
Source: ISMEA-Nielsen-GFK Eurisko Panel on Retail

Incidence of organics in the Italians' spend

As mentioned above, in 2018 organic expenditure value accounts for 3% of the total agri-food sector; however, such estimates require distinguishing among different products in a very diverse landscape.

Whereas, for example, out of EUR 100 spent on eggs almost 15 end up in the organic chain, a few cents go to "certified" organic spending on fresh and processed meat, fish and beer.

Chart 7
INCIDENCE OF THE MAIN ORGANIC SEGMENTS IN THE TOTAL AGRI-FOOD SECTOR (%)
ITALY 2018

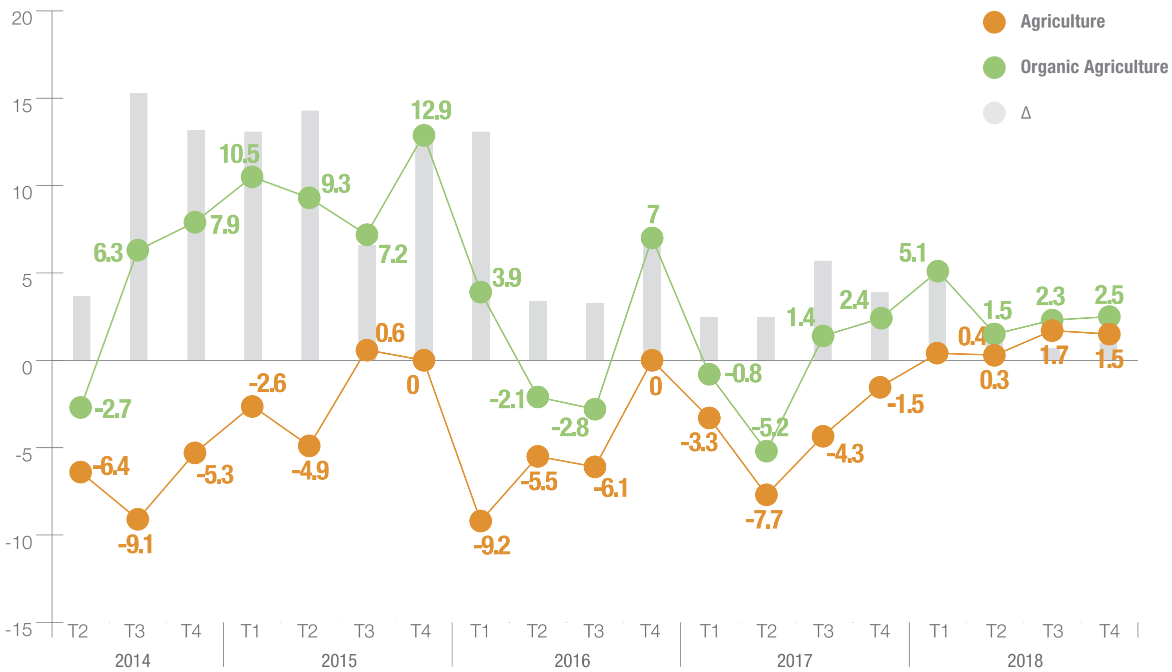


Source: ISMEA-Nielsen Panel on Retail

Organic holdings and confidence climate

Consumer Confidence Index **(Chart 8)**, calculated by ISMEA, is based on the answers given by a sample of 800 agricultural holdings to two questions: the first concerning the business performance and the second on the economic expectations for the years ahead. The index is included in a scale ranging from -100 to +100; the highest value is reached when all respondents express a positive opinion on their business situation and future prospects.

Chart 8
CONFIDENCE CLIMATE INDEX
ITALY 2018*

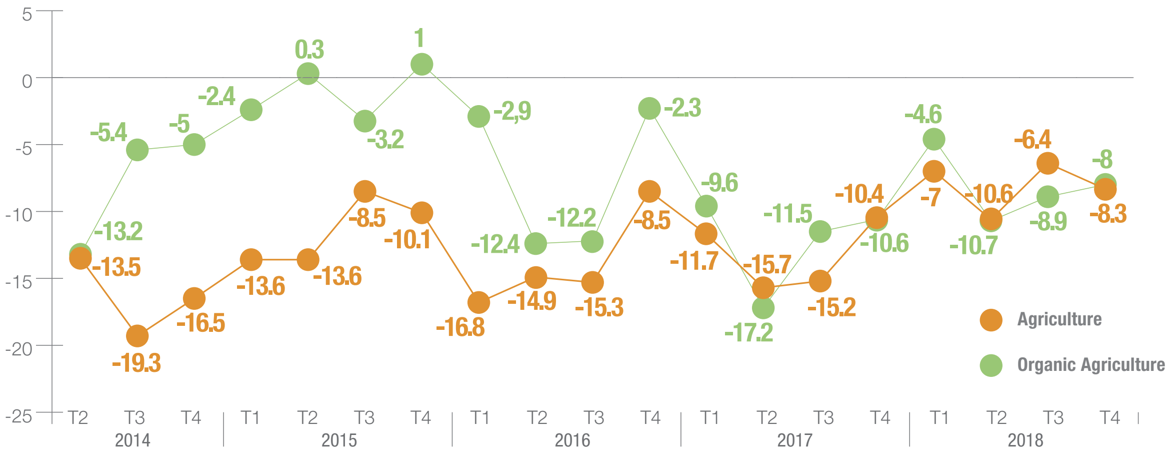


**data reported in the charts are the balance between answer percentage shares (Positive answer share - Negative answer share)*
Source: ISMEA Panel on Agricultural holdings

Overall, the last figures of 2018 show the prevalence of moderate confidence (positive index) in agriculture, which is somewhat greater for organic farming.

However, the gap between the answers given by conventional and organic entrepreneurs is narrowing from 2016 onwards. In particular, they are all concerned by the evaluation of current business, one of the two basic variables used in the calculation of the confidence index.

Chart 9
CONFIDENCE CLIMATE INDEX COMPONENTS: HOLDING'S CURRENT BUSINESS PERFORMANCE
ITALY 2018

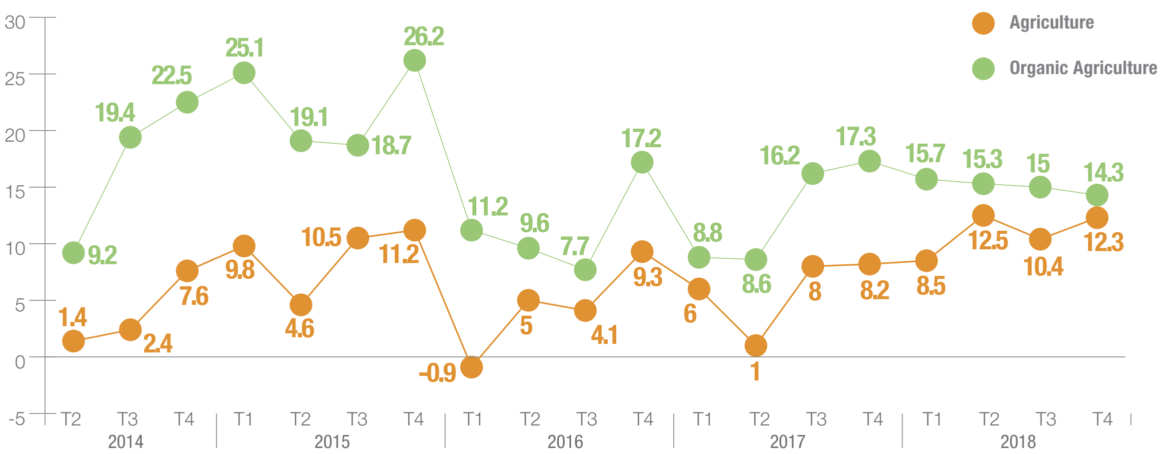


Source: ISMEA Panel on Agricultural holdings

In the past, organic entrepreneurs generally reported less concern about their business performance. In the fourth quarter of 2015, the number of organic holdings that were satisfied with their economic achievements even exceeded the number of those lacking confidence. In contrast, from 2016 onwards, the number of entrepreneurs getting discouraged prevailed also in the organic sector and the difference in the assessment of "business solidity" between organic and "traditional" holdings was lowered to zero.

Despite the prevailing feeling of generalized discontent, the line that tracks farmers' future expectations remains positive and shows that organic farming is a sector where they continue to place confidence and invest more compared to the traditional agricultural sector, that is, however, on the rise.

Chart 10
CONFIDENCE CLIMATE INDEX COMPONENTS: EXPECTATIONS FOR FUTURE PERFORMANCE
ITALY 2018



Source: ISMEA Panel on Agricultural holdings

Organic product price trends

The selling price of organic products is one of the main reasons that lead farmers to convert.

It is well-known that this price differential persists through the whole processing and distribution chain until the sale to the final consumer.

Here, we aim to explore whether the price gap observed for the producer prices is comparable with that of consumer prices or whether the margins of the various players in the chain are different.

Furthermore, the focus is on the quantification of the price difference against conventional agriculture.

This work is not meant to depict in detail a complex, sectoral, territorial and rather volatile market, but it can pave the way for further investigation, focusing on the possible strategies to strengthen the supply chains.

Six agri-food products and their average prices recorded by the ISMEA survey network and collected by Nielsen databases in January 2017 and 2018 were used as examples.

The products were selected in order to keep the historical series unchanged compared to the previous editions of Bio in Cifre.

Producer price

As one might expect, the producer price of the surveyed organic products is 34% higher than that of the same produce which is not certified.

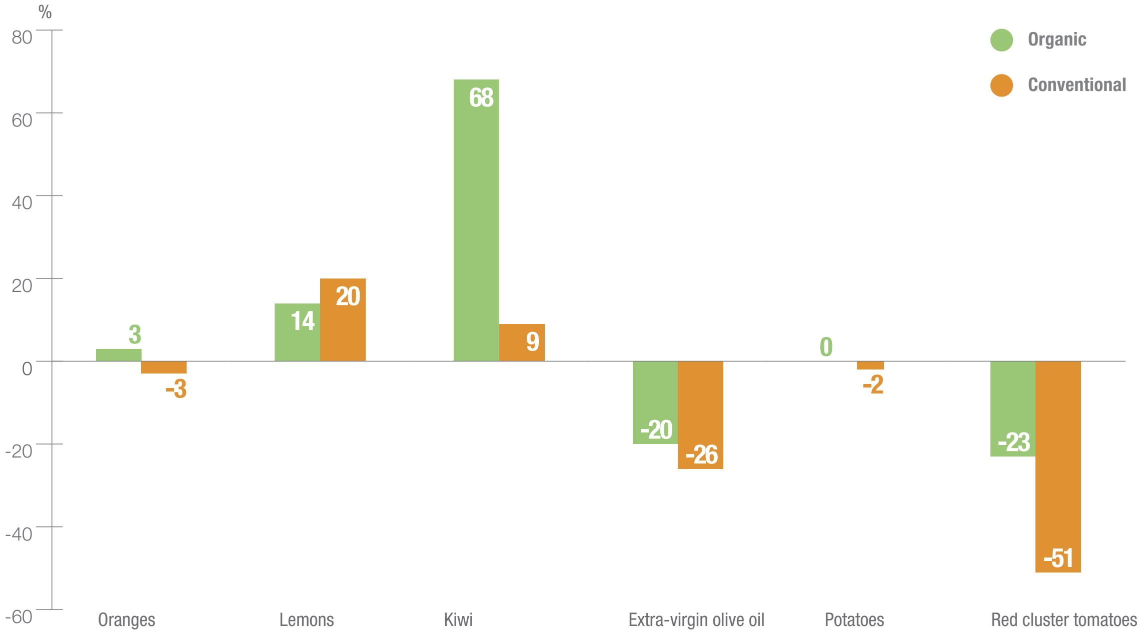
However, the average difference is important and does in no way allow to make an assessment without considering each single sector.

While, for example, organic citrus fruit was sold at a price 10% higher than the non-organic product, tomatoes were awarded a price that was more than twice as high as the non certified produce.

The comparison with the prices collected in the same period of the previous year shows, once again, how the market dynamics and the growing season are reflected both in the conventional and in the organic sector, although with a different incidence.

In fact, in 2018, the producer price for both organic and non-organic lemons and kiwis rose while the price of extra virgin olive oil and tomatoes dropped.

Chart 11
PRODUCER PRICE DYNAMICS OF SOME ORGANIC PRODUCTS AND THEIR CONVENTIONAL COUNTERPARTS
% CHANGE, 2018/2017



Source: ISMEA Price Survey Network

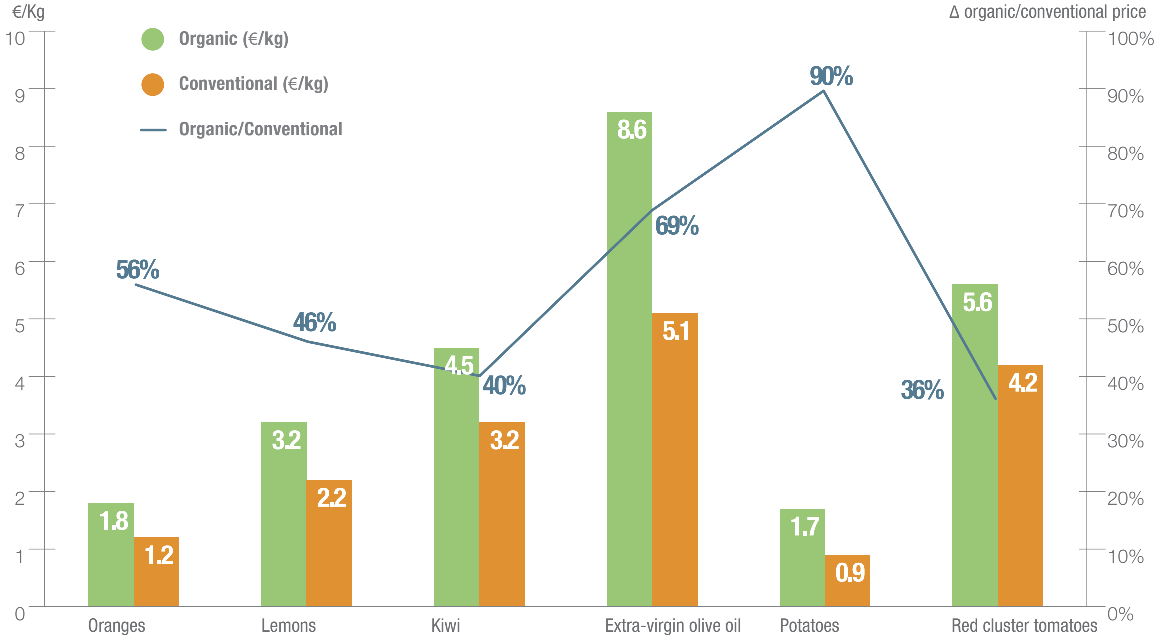
Consumer prices

The prices of the surveyed organic products that we find on the shelves are on average 56% higher than their non-organic counterparts.

This shows how the price premium granted to the farmer persists and rises along the supply chain.

Something that certainly does not reward the weakest links in the chain, namely the farmer and the consumer. Over the last years, farmers have suffered from a lower price received for their organic produce at the farm-gate resulting from greater supply and domination by large retailers, with their contract activities and pricing power; on the other hand, consumers who tend to prefer organic products, don't buy them easily because they are expensive. This statement cannot be generalized, but it is clear that it would be necessary to recognize a higher price to the producer, who, more than any other player in the supply chain, bears the burden of producing with organic methods.

Chart 12
CONSUMER PRICE DYNAMICS OF SOME ORGANIC PRODUCTS AND OF THEIR CONVENTIONAL COUNTERPARTS
ITALY - JANUARY 2018



Source: Compiled by ISMEA based on data provided by Nielsen

Table 1
PRODUCER AND CONSUMER PRICE OF THE SURVEY PRODUCTS
ITALY 2018

2018 (€/kg)	Organic		Conventional	
	Farm-gate	Final consumption	Farm-gate	Final consumption
Oranges *Var. Tarocco* *Marketplace: Catania*	0.4	1.8	0.3	1.2
Lemons *Var. Primofiore* *Marketplace: Catania*	0.5	3.2	0.4	2.2
Kiwi *Marketplace: Forlì*	1.6	4.5	1.4	3.2
EVO *Marketplace: Bari*	5.0	8.6	4.2	5.1
Common potatoes *Marketplace: Ferrara*	0.6	1.7	0.5	0.9
Red tomatoes *Marketplace: Ragusa*	1.7	5.6	0.7	4.2

Source: Compiled by ISMEA based on data provided by Nielsen and ISMEA Price Survey Network

IMPORTS FROM THIRD COUNTRIES

FIGURES ON ORGANIC FARMING

Data
MiPAAFT
Ministry of Agriculture, Food, Forestry Policies and Tourism

Source
MiPAAFT
Ministry of Agriculture, Food, Forestry Policies and Tourism

Data processed by
SINAB
National Information System on Organic Farming
in collaboration with
UNIVPM
Università Politecnica delle Marche
Marie Reine Bteich
Fabiana Crescenzi
Francesco Solfanelli

This section is the result of the collaborative effort of a working group on import/export of organic products, in the framework of DIMECOBIO III project, and including Giacomo Mocciaro (MiPAAFT), Patrizia Pugliese and Luca Romanini (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 834/07, Regulation (EC) No 889/08 and Regulation (EC) No 1235/08. 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 consider 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 have been prepared by the SINAB on the basis of the data collected from the written notification that importers are requested to send to MiPAAFT at the end of each year (Ministerial Decree No 700/2011 Annex 1 and Annex 2; Ministerial Decree No 18378/2012 Annex 1 and Annex 2).

As of 31 december 2017, there were 411 companies on the national list of importers of organic products from third countries. Data relating to the volumes of products declared by these companies themselves have been classified according to the TARIC customs tariffs (Integrated Tariff of the European Communities), as reported by the operators in their written notification. TARIC[1] 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.

Import of organic products from third countries – Data analysis - 31 december 2017

Data on imports of organic products from third countries indicate a limited increase in total volumes in 2017, amounting to approximately 16.80% compared to 2016. This positive trend was mainly driven by the fruit category, which grew by 54.28% compared to 2016. Other produce categories that had substantial positive variations compared to 2016 were vegetables (+29.57%), coffee/cocoa/sugars (+79.56%) and processed products (+104.62%). By contrast, the group of edible oils, shows a slight decrease in imported volumes, with a decrease of 6.55% compared to 2016. Overall, the volumes of cereals and industrial crops imported from third countries remain almost unchanged: +2.65% and -1.73% respectively, compared to 2016.

As far as supply markets are concerned, the year 2017 featured a high prevalence of supplies from Asia (30.43% in volume) and non-EU European countries (28.42% in volume), up 8.34% and 2.60% respectively compared to 2016. However, the situation in these countries is very diverse, with China playing a

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

particularly significant role in the import of industrial crops (soya beans and soybean meal) and Pakistan in the import of rice. However, it should be noted that imports of soya beans and soybean meal from China decreased totally by 33.22% compared to 2016. Among the non-EU European countries, Turkey is characterized by the import of cereals (durum wheat and rice) and industrial crops (mainly sunflower and rape).

Latin America continues to be a very important geographical area for Italian organic imports: overall, in 2017 20.32% of total volumes were imported from this geographical area. From Latin American countries imports mostly include fresh fruit (especially bananas, apples and pears), cane sugar and coffee. Compared to 2016, it is worth noting that banana imports from South America have increased significantly (+115.11% from Ecuador), while those from Central America have decreased (-50.04% from the Dominican Republic).

As regards the African countries (Egypt and Tunisia above all), from which mainly processed products and vegetables are imported, a slight overall increase in imports was recorded (+4.81 compared to 2016). More specifically, in the "processed products" category, there was a moderate reduction in imports of olive oil from Tunisia (-4.72 compared to the previous year). On the other hand, the volumes of vegetables imported from the African continent grew considerably. This increase was mainly determined by potatoes and onions from Egypt (+314.06% compared to 2016).

Imports from North America are on the increase (+58.12% compared to 2016) and mainly concern agave syrup from Mexico (imports of this product from Mexico account for 34.46% by volume in the sugar segment). Other North American supplier countries are Canada and the USA, which remain two important sources of supply of durum wheat and beans respectively, for our country.

Table 1
ORGANIC IMPORT VOLUMES BY PRODUCT CATEGORY AND GEOGRAPHICAL AREA
ITALY 2016 - 2017 (VALUE IN TONNES)

Product	Area of origin	Volumes (t) 2016	Volumes (t) 2017	'17-'16
Cereals	Africa	0,00	0,00	-
	Asia	13.492,19	22.850,03	69,36
	Central America	0,00	0,00	-
	Non-Eu Europe	28.076,68	19.185,04	-31,67
	North America	3.130,16	3.276,40	4,67
	Oceania	52,76	0,00	-100,00
	South America	2.000,44	2.681,34	34,04
	Total	**46.752,23**	**47.992,81**	**2,65**
Fresh and dried fruits	Africa	684,03	358,69	-47,56
	Asia	385,77	989,00	156,37
	Central America	8.172,36	4.730,29	-42,12
	Non-Eu Europe	2.981,25	4.186,60	40,43
	North America	90,36	47,02	-47,97
	Oceania	219,11	310,42	41,67
	South America	10.513,32	24.934,76	137,17
	Total	**23.046,20**	**35.556,78**	**54,28**
Vegetables and legumes	Africa	805,53	2.883,94	258,02
	Asia	8.132,86	5.687,12	-30,07
	Central America	0,00	0,00	-
	Non-Eu Europe	1.447,24	4.103,40	183,53
	North America	388,21	429,13	10,54
	Oceania	0,00	0,00	-
	South America	216,97	1.137,10	424,08
	Total	**10.990,81**	**14.240,70**	**29,57**
Industrial crops*	Africa	6.230,23	6.065,55	-2,64
	Asia	32.885,86	29.945,50	-8,94
	Central America	0,00	0,00	-
	Non-Eu Europe	22.596,04	24.333,35	7,69
	North America	0,00	75,25	-
	Oceania	0,00	0,00	-
	South America	379,57	595,01	56,76
	Total	**62.091,71**	**61.014,66**	**-1,73**

Table 1
ORGANIC IMPORT VOLUMES BY PRODUCT CATEGORY AND GEOGRAPHICAL AREA
ITALY 2016 - 2017 (VALUE IN TONNES)

Product	Area of origin	Volumes (t) 2016	Volumes (t) 2017	% Var '17-'16
Vegetable oils and fats	Africa	17.800,66	16.891,16	-5,11
	Asia	28,59	74,79	161,58
	Central America	0,00	0,00	-
	Non-Eu Europe	316,55	20,38	-93,56
	North America	79,36	60,25	-24,08
	Oceania	0,00	0,00	-
	South America	86,60	65,53	-24,34
	Total	**18.311,76**	**17.112,11**	**-6,55**
Coffee, Cocoa, Sugars, Tea and Spices	Africa	161,50	331,52	105,27
	Asia	1.574,77	1.430,24	-9,18
	Central America	733,79	2.158,71	194,19
	Non-Eu Europe	198,50	214,35	7,98
	North America	1.480,92	4.274,53	188,64
	Oceania	0,00	0,01	-
	South America	7.036,42	11.675,69	65,93
	Total	**11.185,91**	**20.085,06**	**79,56**
Processed products	Africa	718,20	1.139,18	58,62
	Asia	2.038,85	2.442,61	19,80
	Central America	18,40	3,15	-82,88
	Non-Eu Europe	2.115,00	7.189,41	239,92
	North America	224,92	366,30	62,86
	Oceania	0,46	0,51	10,64
	South America	952,21	1.275,56	33,96
	Total	**6.068,04**	**12.416,71**	**104,62**
Total		**178.446,66**	**208.418,83**	**16,80**

**This category also includes soybean meal*

Chart 1
ORGANIC IMPORTS BY PRODUCT CATEGORY
ITALY 2016 - 2017 (VALUE IN TONNES)

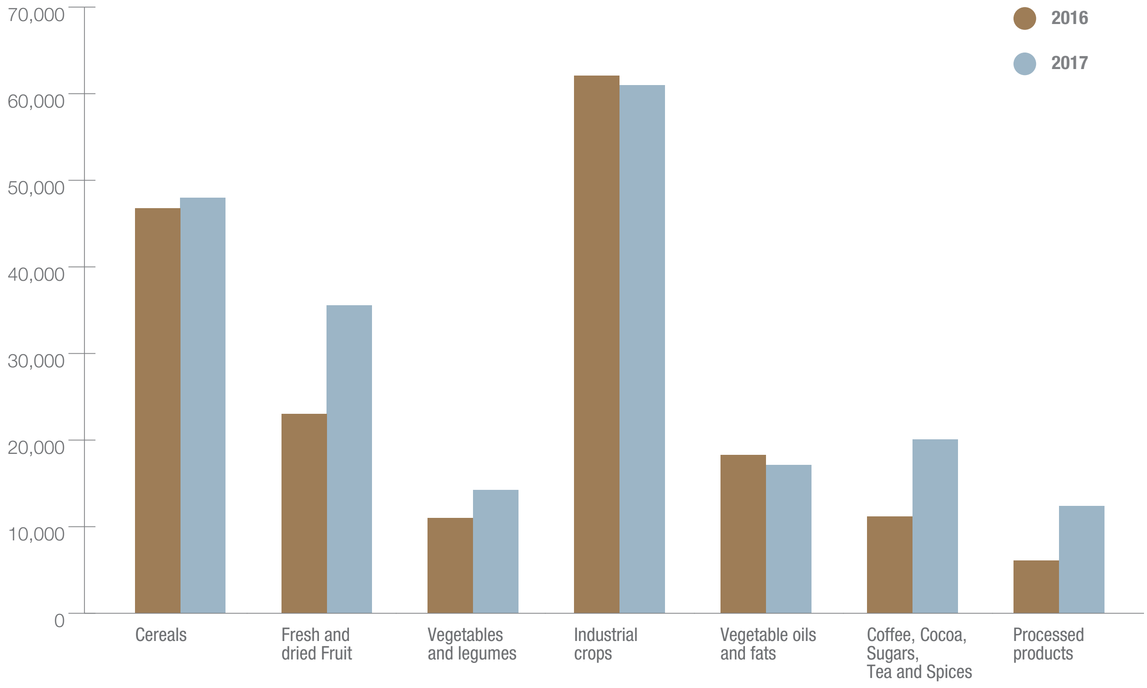
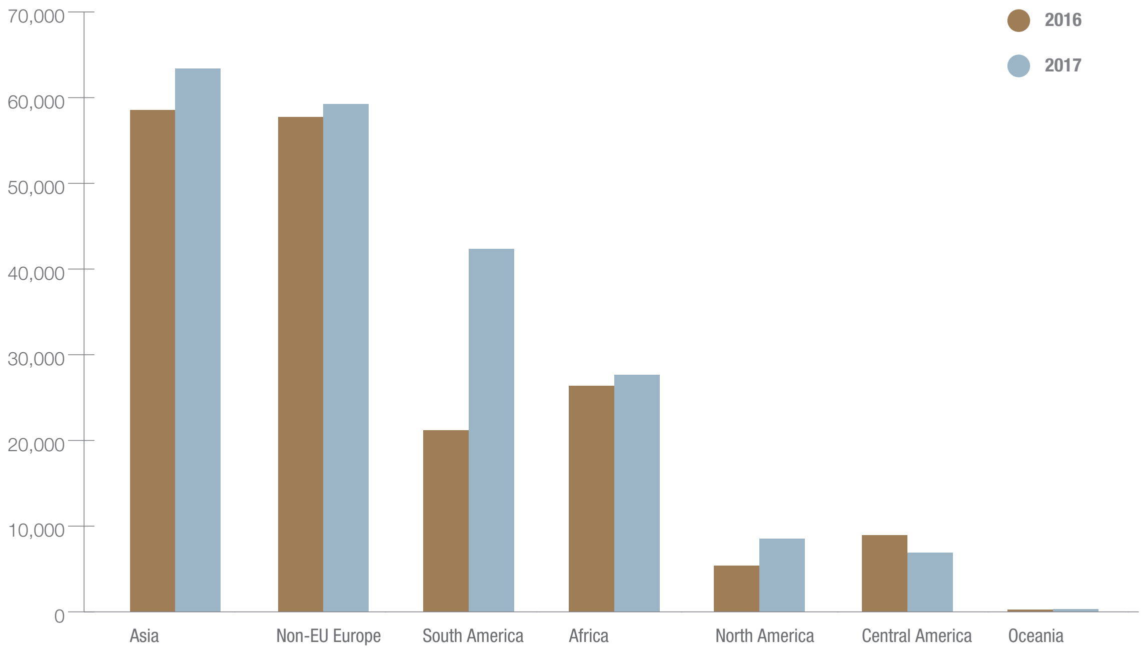


Chart 2
ORGANIC IMPORTS GEOGRAPHICAL AREA
ITALY 2016 - 2017 (VALUE IN TONNES)



CEREALS

Chart 3
CEREAL IMPORTS
ITALY 2016 - 2017 (VALUE IN TONNES)

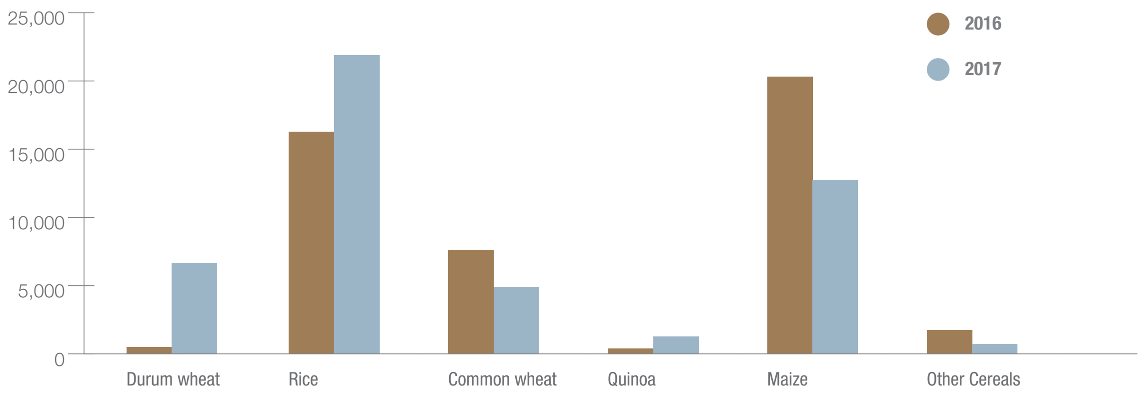


Table 2
CEREAL IMPORTS: MAIN COUNTRIES OF ORIGIN
ITALY 2017 (VALUE IN TONNES)

Continent	Country	Durum wheat	Rice	Common wheat	Quinoa	Maize	Other Cereals	Total country
North America	Canada	624.90	-	2,631.00	-	-	-	3,255.90
	Mexico	-	-	-	-	-	10.50	10.50
	USA	-	10.00	-	-	-	-	10.00
South America	Argentina	-	443.45	-	-	-	-	443.45
	Bolivia	-	-	-	186.22	-	-	186.22
	Brazil	-	763.36	-	-	-	-	763.36
	Peru	-	-	-	1,080.80	-	10.57	1,091.37
	Uruguay	-	196.94	-	-	-	-	196.94
Asia	Cambodia	-	1,684.00	-	-	-	-	1,684.00
	China	-	-	-	-	-	287.13	287.13
	India	-	5,150.01	-	-	-	8.00	5,158.01
	Indonesia	-	13.00	-	-	-	-	13.00
	Pakistan	-	8,039.49	-	-	-	-	8,039.49
	Philippines	-	5.55	-	-	-	-	5.55
	Russia	-	-	2,193.00	-	2,807.63	-	5,000.63
	Thailand	-	2,662.22	-	-	-	-	2,662.22
Non-EU Europe	Rep.of Moldova	-	-	-	-	2,498.56	176.04	2,674.60
	Serbia	-	-	70.04	-	-	-	70.04
	Switzerland	-	78.00	-	-	-	-	78.00
	Turkey	6,016.98	2,840.00	-	-	-	36.00	8,892.98
	Ukraine	-	-	20.11	-	7,449.31	-	7,469.42
Total		6,641.88	21,886.02	4,914.15	1,267.02	12,755.50	528.23	47,992.80

FRESH AND DRIED FRUIT

Chart 4
IIMPORTS OF FRESH AND DRIED FRUIT
ITALY 2016 - 2017 (VALUE IN TONNES)

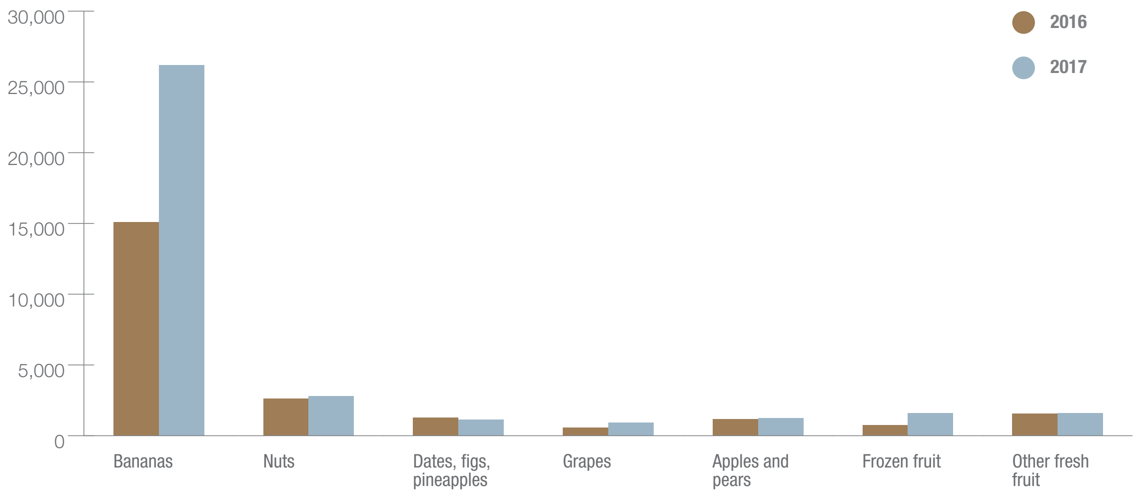


Table 3
IMPORTS OF FRESH AND DRIED FRUIT; MAIN COUNTRIES OF ORIGIN
ITALY 2017 (VALUE IN TONNES)

Continent	Country	Bananas	Nuts	Dates, Figs, Pineapples	Grapes	Apples and pears	Frozen fruit	Other fresh fruit	Total country
Africa	Burkina Faso	-	-	-	-	-	18.00	-	18.00
	Egypt	-	-	3.20	-	-	-	-	3.20
	Ghana	-	1.01	0.50	-	-	-	-	1.51
	Ivory Coast	-	83.38	-	-	-	-	-	83.38
	Togo	-	-	3.40	-	-	-	-	3.40
	Tunisia	-	-	249.20	-	-	-	-	249.20
Central America	Costa Rica	262.32	-	683.98	-	-	-	-	946.30
	Domenican Rep.	3,783.99	-	-	-	-	-	-	3,783.99
North America	Canada	-	-	-	-	-	27.04	-	27.04
	USA	-	19.98	-	-	-	-	-	19.98
South America	Argentina	-	91.77	-	-	892.92	-	23.76	1,008.45
	Bolivia	-	73.82	-	-	-	-	-	73.82
	Brazil	-	95.46	-	-	-	-	-	95.46
	Chile	-	148.41	-	-	96.28	0.89	1,322.88	1,568.46
	Colombia	1,194.66	0.60	1.20	-	-	0.48	0.06	1,197.00
	Ecuador	15,447.44	0.06	-	-	-	-	-	15,447.50
	Peru	5,425.56	16.40	21.71	-	-	80.40	-	5,544.07
Asia	China	-	188.00	-	-	-	-	-	188.00
	India	-	44.28	-	-	-	-	-	44.28
	Israel	-	-	132.73	-	-	-	-	132.73
	Mongolia	-	6.00	-	-	-	-	-	6.00
	Philippines	90.00	-	-	-	-	-	-	90.00
	Sri Lanka	-	16.20	-	-	-	-	-	16.20
	Vietnam	-	511.79	-	-	-	-	-	511.79
Non-EU Europe	Albania	-	332.54	-	-	-	156.76	191.83	681.13
	Rep. of Moldavia	-	397.20	-	-	-	-	-	397.20
	Rep. of San Marino	-	-	-	-	-	200.00	-	200.00
	Serbia	-	-	-	-	-	140.05	-	140.05
	Switzerland	-	-	3.84	-	-	-	-	3.84
	Turkey	-	791.06	49.68	937.01	-	678.48	-	2,456.24
	Ukraine	-	-	-	-	-	308.15	-	308.15
Oceania	New Zealand	-	-	-	-	261.90	-	48.52	310.42
Total		26,203.97	2,817.96	1,149.45	937.01	1,251.10	1,610.24	1,587.04	35,556.78

VEGETABLES AND LEGUMES

Chart 5
IMPORTS OF VEGETABLES AND LEGUMES
ITALY 2016 - 2017 (VALUE IN TONNES)

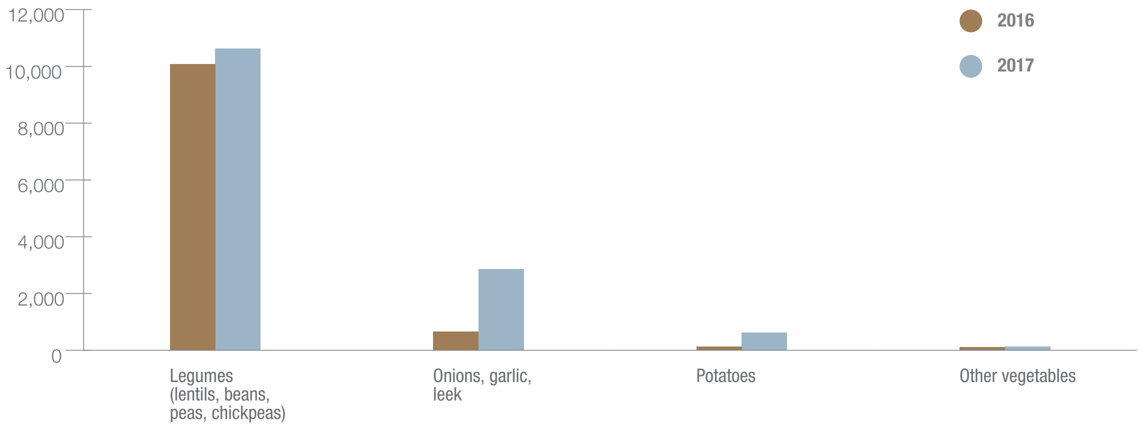


Table 4
IMPORTS OF VEGETABLES AND LEGUMES: MAIN COUNTRIES OF ORIGIN
ITALY 2017 (VALUE IN TONNES)

Continent	Country	Potatoes	Onions, garlic, leek	Legumes (lentils, beans, peas, chickpeas)	Other vegetables	Total country
Africa	Egypt	624.80	1,786.35	469.19	-	2,880.34
	Morocco	-	-	-	3.60	3.60
North America	Canada	-	-	128.50	-	128.50
	USA	-	-	300.63	-	300.63
South America	Argentina	-	1,053.50	63.00	20.00	1,136.50
	Ecuador	-	-	0.60	-	0.60
Asia	China	-	18.00	5,398.88	-	5,416.88
	India	-	-	255.15	-	255.15
	Japan	-	-	0.10	-	0.10
	Kyrgyzstan	-	-	15.00	-	15.00
Non-EU Europe	Rep. of Moldavia	-	-	169.10	-	169.10
	Serbia	-	4.35	3.06	-	7.41
	Switzerland	-	-	0.08	-	0.08
	Turkey	-	-	3,825.18	101.64	3,926.82
Total		624.80	2,862.20	10,628.47	125.24	14,240.70

INDUSTRIAL CROPS

Chart 6
IMPORTS OF INDUSTRIAL CROPS
ITALY 2016 - 2017 (VALUE IN TONNES)

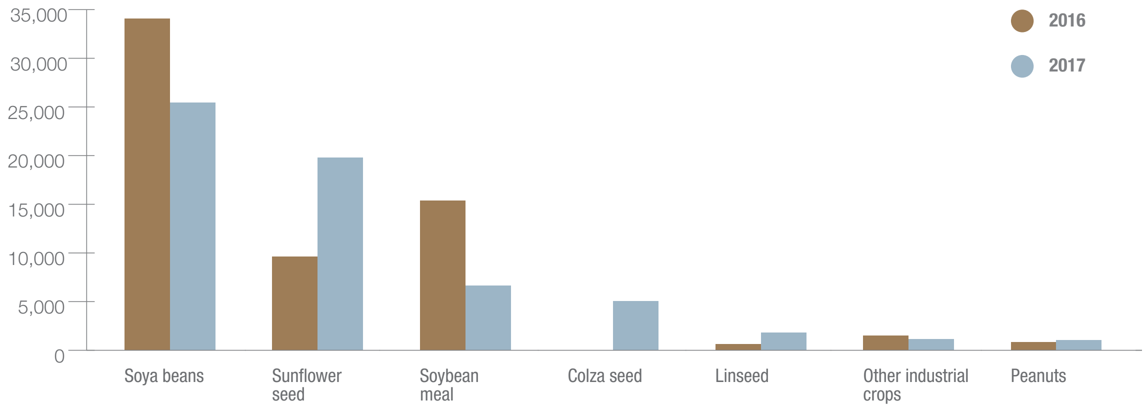


Table 5
IMPORTS OF INDUSTRIAL CROPS: MAIN COUNTRIES OF ORIGIN
ITALY 2017 (VALUE IN TONNES)

Continent	Country	Soybean meal	Soya beans	Peanuts	Linseed	Colza seed	Sunflower seed	Other industrial crops	Total country
Africa	Egypt	-	-	913.65	-	-	-	10.47	924.12
	Kenya	-	-	-	-	-	-	1.85	1.85
	Morocco	-	-	-	-	-	-	185.50	185.50
	Senegal	-	-	-	-	-	-	7.00	7.00
	South Africa	-	-	-	-	-	-	5.86	5.86
	Togo	-	4,853.63	-	-	-	-	-	4,853.63
	Tunisia	-	-	-	-	-	-	87.60	87.60
North America	Canada	-	75.20	-	-	-	-	-	75.20
	USA	-	-	-	-	-	-	0.05	0.05
South America	Argentina	-	-	-	-	-	217.44	8.66	226.10
	Bolivia	-	-	-	-	-	-	0.50	0.50
	Brazil	-	-	-	-	159.71	9.59	-	169.30
	Chile	-	-	-	-	-	-	48.00	48.00
	Ecuador	-	-	1.50	-	-	-	0.03	1.53
	Paraguay	-	-	-	-	-	-	78.50	78.50
	Peru	-	-	-	-	-	-	71.08	71.08
Asia	Arab Emirates	-	6,100.00	-	-	-	5,305.35	-	11,405.35
	China	6,642.38	10,621.13	119.50	25.00	-	367.50	299.70	18,075.20
	India	-	-	-	115.00	-	-	229.18	344.18
	Japan	-	-	-	-	-	-	3.72	3.72
	Kazakhtan	-	-	-	-	81.00	-	-	81.00
	Pakistan	-	-	-	-	-	-	36.00	36.00
	Sri Lanka	-	-	-	-	-	-	0.05	0.05
Non-EU Europe	Albania	-	-	-	-	-	-	7.82	7.82
	Bosnia and Herzegovina	-	-	-	-	-	-	3.20	3.20
	Rep. of Moldavia	-	263.64	-	-	-	-	-	263.64
	Switzerland	-	-	-	-	-	-	0.08	0.08
	Turkey	-	3,535.70	-	1,684.00	2,001.76	13,500.00	96.00	20,817.46
	Ukraine	-	-	-	-	2,840.92	400.23	-	3,241.15
Total		**6,642.38**	**25,449.30**	**1,034.65**	**1,824.00**	**5,083.39**	**19,800.11**	**1,180.84**	**61,014.66**

VEGETABLE OILS AND FATS

Chart 7
IMPORTS OF VEGETABLE OILS AND FATS
ITALY 2016 - 2017 (VALUE IN TONNES)

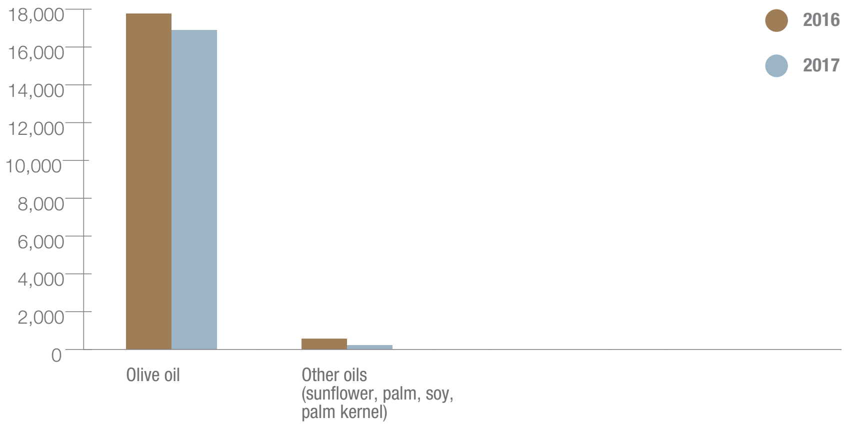


Table 6
IMPORTS OF VEGETABLE OILS AND FATS: MAIN COUNTRIES OF ORIGIN
ITALY 2017 (VALUE IN TONNES)

Continent	Country	Olive Oil	Other oils (sunflower, palm, soy, palm kernel)	Total country
Africa	Burkina Faso	-	1.00	1.00
	Morocco	-	2.85	2.85
	Tunisia	16,887.31	-	16,887.31
North America	USA	-	60.25	60.25
South America	Brazil	-	41.52	41.52
	Ecuador	-	23.02	23.02
	Peru	-	0.99	0.99
Asia	China	-	2.45	2.45
	India	-	6.00	6.00
	Israel	1.12	-	1.12
	Philippines	-	15.77	15.77
	Sri Lanka	-	49.44	49.44
	Thailand	-	0.01	0.01
Non-EU Europe	Switzerland	-	20.38	20.38
Total		16,888.43	223.68	17,112.11

COFFEE, TEA, SPICES, SUGARS AND COCOA

Chart 8
IMPORTS OF COFFEE, TEA, SPICES, SUGARS AND COCOA
ITALY 2016 - 2017 (VALUE IN TONNES)

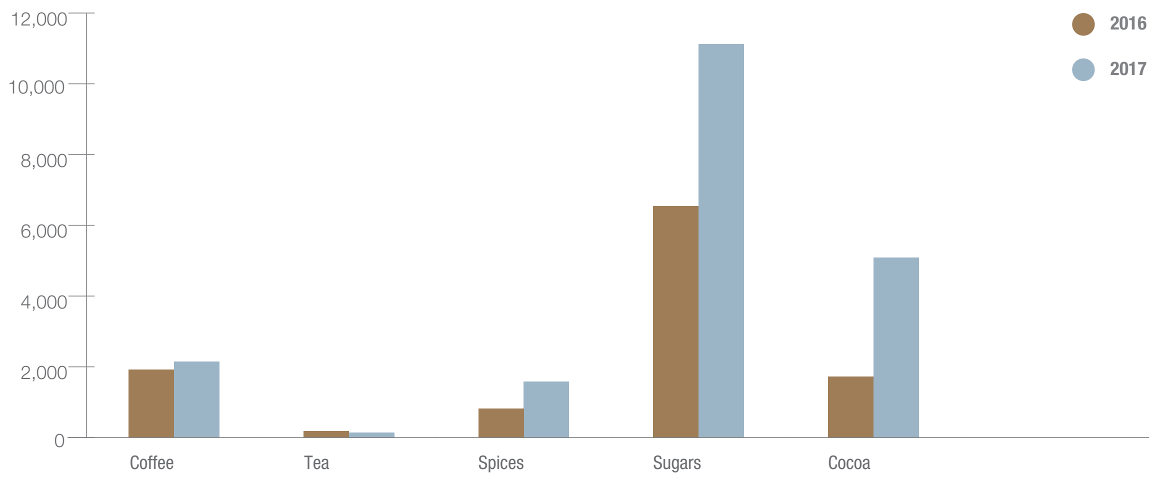


Table 7
IMPORTS OF COFFEE, TEA, SPICES, SUGARS AND COCOA: MAIN COUNTRIES OF ORIGIN
ITALY 2017 (VALUE IN TONNES)

Continent	Country	Coffee	Thea	Spices	Sugars*	Cocoa	Total country
Africa	Egypt	-	-	20.00	-	-	20.00
	Ethiopia	76.80	-	-	-	-	76.80
	Ivory Coast	-	-	-	-	25.00	25.00
	Madagascar	-	-	-	-	50.00	50.00
	Morocco	-	-	0.00	-	-	0.00
	Tanzania	5.52	-	-	-	-	5.52
	Uganda	154.20	-	-	-	-	154.20
Central America	Costa Rica	-	-	-	20.00	-	20.00
	Domenican Rep.	1.29	-	-	-	1,425.00	1,426.29
	Guatemala	83.15	-	-	-	-	83.15
	Honduras	629.28	-	-	-	-	629.28
North America	Canada	5.20	-	-	62.65	-	67.85
	Messico	372.25	-	-	3,830.83	-	4,203.08
	USA	-	-	-	3.60	-	3.60
South America	Argentina	-	-	0.82	48.00	-	48.82
	Bolivia	-	-	-	-	9.00	9.00
	Brazil	57.55	-	2.46	1,406.81	-	1,466.82
	Colombia	15.05	-	-	757.30	3.50	775.85
	Ecuador	-	-	-	397.59	92.81	490.40
	Nicaragua	291.92	-	-	36.00	-	327.92
	Paraguay	-	-	-	2,278.25	-	2,278.25
	Peru	331.55	-	1,447.05	1,200.00	3,300.02	6,278.62
Asia	Cambodia	-	-	-	73.60	-	73.60
	China	-	-	21.70	-	-	21.70
	India	94.40	132.48	88.76	60.00	-	375.64
	Indonesia	-	-	-	15.92	3.16	19.08
	Japan	-	12.10	-	-	-	12.10
	Pakistan	-	-	-	220.18	-	220.18
	Philippines	-	-	-	662.37	-	662.37
	Sri Lanka	-	0.44	0.14	-	-	0.58
	Thailandia	-	-	-	45.00	-	45.00
Non-EU Europe	Albania	-	-	1.00	-	-	1.00
	Bosnia and Herzegovina	-	-	4.30	-	-	4.30
	Switzerland	25.19	-	0.41	-	183.45	209.04
Oceania	New Zealand	-	-	-	0.01	-	0.01
Total		2,143.33	145.02	1,586.65	11,118.11	5,091.95	20,085.06

The sugar category also includes maple syrup and agave syrup.

OTHER PROCESSED PRODUCTS

Chart 9
IMPORTS OF PROCESSED PRODUCTS
ITALY 2016 - 2017 (VALUE IN TONNES)

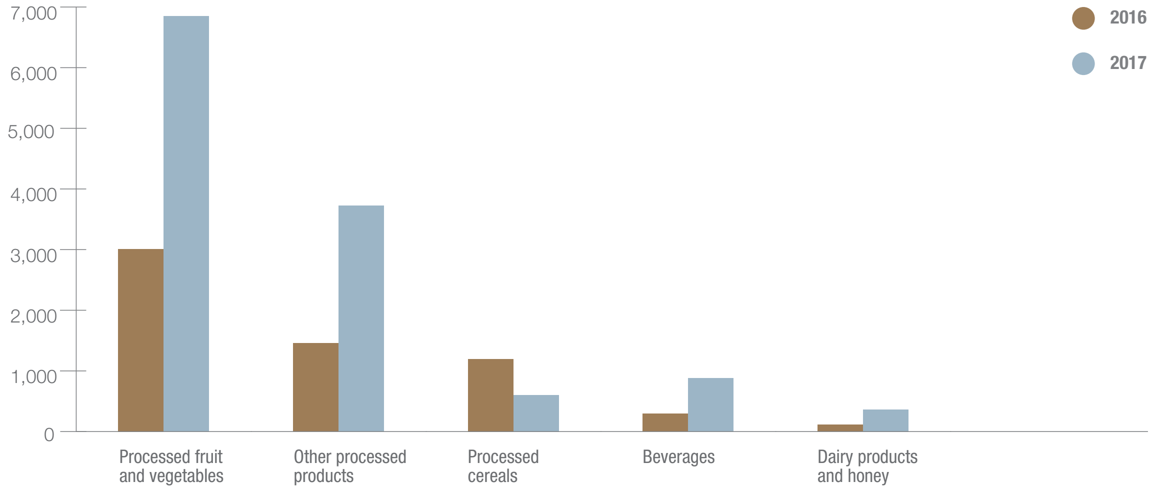


Table 8
IMPORTS OF PROCESSED PRODUCTS IN 2017: MAIN COUNTRIES OF ORIGIN
ITALY 2017 (VALUE IN TONNES)

Continent	Country	Processed fruit and vegetables*	Processed cereals	Dairy products and honey	Beverages	Other processed products	Total country
Africa	Benin	0.06	-	-	-	-	**0.06**
	Mali	722.40	-	-	-	-	**722.40**
	Morocco	-	-	-	-	21.39	**21.39**
	Senegal	73.02	-	-	-	0.50	**73.53**
	South Africa	316.80	-	-	-	5.00	**321.80**
Central America	Costa Rica	2.03	-	-	-	-	**2.03**
	Cuba	-	-	1.13	-	-	**1.13**
North America	Mexico	23.58	-	148.45	1.60	181.04	**354.67**
	USA	-	-	-	1.84	9.79	**11.63**
South America	Argentina	-	-	19.80	130.57	-	**150.37**
	Bolivia	-	-	-	-	10.00	**10.00**
	Brazil	455.00	-	41.53	493.68	-	**990.20**
	Chile	20.76	-	-	25.50	-	**46.26**
	Colombia	0.29	-	-	-	0.56	**0.85**
	Ecuador	11.19	-	-	-	-	**11.19**
	Peru	4.21	-	-	1.81	-	**6.01**
	Uruguay	-	-	10.78	-	49.88	**60.66**
Asia	China	31.34	-	142.10	-	114.08	**287.52**
	India	64.10	-	-	-	47.26	**111.36**
	Israele	47.76	73.02	-	-	0.30	**121.08**
	Japan	5.50	6.72	-	7.75	69.18	**89.16**
	Pakistan	-	-	-	-	40.69	**40.69**
	Philippines	-	-	-	164.80	55.00	**219.80**
	Russia	-	-	-	1.65	378.22	**379.87**
	Sri Lanka	-	-	-	-	931.85	**931.85**
	Thailand	-	-	-	-	245.30	**245.30**
	Vietnam	-	-	-	-	16.00	**16.00**
Non-EU Europe	Albania	-	-	-	-	8.39	**8.39**
	Bosnia and Herzegovina	8.92	-	-	9.80	-	**18.72**
	Serbia	3,892.85	-	-	-	-	**3,892.85**
	Switzerlan	33.23	520.40	-	26.25	1,531.88	**2,111.76**
	Turkey	1,134.69	3.00	-	15.90	4.10	**1,157.69**
Oceania	New Zealand	-	-	0.51	-	-	**0.51**
Total		**6,847.73**	**603.15**	**364.29**	**881.14**	**3,720.40**	**12,416.71**

**Processed fruit and vegetables also include fruit jams and juices*

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