

BIO

IN CIFRE

2024



BIO IN CIFRE - 2024

Facts and Figures on Organic Agriculture in Italy

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ACRONYMES

A.P.

Autonomous Province

CB

Control Body

CIHEAM Bari

Mediterranean Agronomic Institute of Bari

CN

Combined Nomenclature

EC

European Commission

EU

European Union

ISMEA

Institute of Services for the Agricultural and Food Market

ISTAT

Italian National Institute of Statistics

MASAF

Ministry of Agriculture, Food Sovereignty and Forests

SIB

Organic Information System

SINAB

National Information System on Organic Agriculture

SPA

Survey on the Structure of Agricultural Holdings

TARIC

Integrated Tariff of the European Communities

TRACES

TRAdE Control and Expert System

UAA

Utilised Agricultural Area

UNIVPM

Polytechnic University of Marche

Foreword

With this edition, the *'Bio in Cifre'* report marks its twentieth year, continuing to provide an essential annual overview of the key structural and economic indicators within the Italian organic sector and its supply chains.

Organic farming plays a key role in the European Union's agricultural policies, valued for its numerous positive environmental externalities. Reflecting this priority, Italy's CAP Strategic Plan for 2023–2027 has dedicated the largest share of its rural development budget to supporting the adoption and maintenance of organic practices (SRA 29 action). This allocation exceeds 2.2 billion EUR, representing 48% of all agri-environmental interventions and around 14% of the total public expenditure planned for the second pillar over the five-year period.

2023 was a watershed year for European agriculture in several respects. In terms of agricultural policy, it was the year of transition between two EU programming periods with some significant differences, mainly due to the introduction of a new mechanism for the functioning and coordination of governance between the European Commission, the Member States and the Regions, but also due to the introduction of new objectives.

Implementing the measures outlined in Italy's CAP Strategic Plan 2023–2027 at the farm level has been challenging. Regional administrations, accustomed to navigating rural development policies over multiple programming periods, faced the added complexity of managing first-pillar measures for the first time. While the range of tools available to farms has expanded, the introduction of these new rules has led to confusion among farmers, creating a disconnect from CAP instruments and intensifying the uncertainty typically associated with transitions between programmes.

A similar rationale applies to the support measures for organic farming, which, with their funding, have become even more central to rural environmental policy than in the past.

On one hand, the growth of organic farming areas remains positive, aligning with expectations. On the other hand, a troubling trend has emerged, with many farms opting to withdraw from the organic system. These farms perceive the incentive mechanism not as an opportunity, but as a restrictive set of voluntary commitments that compounds the already binding requirements of the new environmental policies.

These challenges become clearer when viewed within the broader macroeconomic context beyond the CAP, which affects the agricultural sector. Factors such as

rising production costs, limited availability of key inputs, and a shrinking market premium for organic products compared to conventional ones all play a significant role. This scenario must also account for the increasing concern over climate-related disasters. While organic farming offers a sustainable production model that can help mitigate these impacts, it also adds complexity to managing affected production systems. Italy's commitment to developing the organic sector remains clear, as demonstrated by its strategic decisions. Beyond the resources and tools provided by the CAP, additional national measures are being developed to foster productive synergies.

In early 2023, a decree was passed outlining the requirements and conditions for the establishment and recognition of organic districts and biodistricts, as specified in Article 13 of the March 9, 2022 law. Building on this, in 2024, MASAF (Italian Ministry of Agriculture, Food Sovereignty and Forests) launched a selection process for project proposals from organic districts aimed at promoting environmentally sustainable agriculture and strengthening organic supply chains.

Notably, starting in 2024, Italy has also adopted a National Action Plan for Organic Production (PANBio), in accordance with the 2022 National Law on the protection, development, and competitiveness of organic agricultural production.

The PANBio strategy not only aims to enhance and integrate existing tools for organic farming, but also outlines key interventions to support the sector's development and address persistent challenges. Among these challenges is the need to increase the availability of organic seeds and propagation material, with the goal of reducing the sector's over-reliance on derogations for the use of conventional varieties.

Additional measures proposed by PANBio include the establishment of a brand for Italian organic products, aimed at revitalizing the market by highlighting 'Made in Italy' offerings and strengthening local supply chains. The plan also allocates resources to promote specialized research in organic farming.

Support strategies are also being developed to enhance both supply and demand by fostering participatory development mechanisms. These will include direct aid for knowledge transfer, advisory services, and promotional initiatives that benefit organic districts and industry associations. Additionally, the continuation of the fund for organic school canteens aims to increase organic

production and consumption within educational institutions while raising awareness among younger generations about healthy and sustainable diets.

While many of these initiatives have yet to directly influence the figures in the organic sector, their implementation has only recently begun and will continue into 2024. A more thorough evaluation of the effectiveness of this comprehensive package of measures will be possible once the data from the upcoming *Bio in cifre* report is released.

Meanwhile, we must not overlook the rapidly evolving landscape of the agri-food sector, characterized by farmer protests that erupted across various European countries in early 2024, albeit with differing intensities. The unrest among farmers stems from structural issues—primarily the agricultural sector's vulnerability within the broader agri-food supply chain—as well as conjunctural factors, such as price volatility and escalating production costs driven by rising interest rates and tensions in energy and input markets amid a turbulent geopolitical climate.

Moreover, the discontent arises from the impacts of the 2023–27 Common Agricultural Policy (CAP), particularly its "environmental" components, which are shaped by the "Farm to Fork" strategy—the agricultural arm of the Green Deal. Many farmers increasingly view this strategy as antagonistic, casting them in a negative light instead of acknowledging their vital role as stewards of the land and environment.

Europe has faced criticism for raising environmental sustainability standards without fully considering the implications for the feasibility of certain regulations and the balance between environmental aspirations and the realities of agricultural production.

In response to the urgent concerns of the farming community, the European Commission swiftly proposed a series of measures aimed at reducing administrative burdens, ensuring fair distribution of margins along the

supply chain, and, as an initial step, amending the Common Agricultural Policy (CAP).

This process culminated in an amendment to the basic regulation just before the 2024 European elections, resulting in a CAP that is weaker from an environmental perspective, particularly concerning compulsory cross-compliance measures.

To date, no new developments have undermined the positive outlook positioning organic farming as the preferred agricultural model in Europe. However, there is an increasing risk that this momentum could ignite discussions about scaling back ambitious environmental targets, including the potential to make goals—such as achieving 25% organic farmland by 2030—less binding. In this complex landscape of shifting variables and dynamics, redefining the identity of the organic sector will be crucial for its future and for ensuring the effectiveness of the National Action Plan development strategy. This calls for a market repositioning focused on restoring attractiveness by instilling confidence and assurance in consumers, especially given the risks posed by misleading commercial communications. For years, various claims related to health and environmental sustainability—such as "zero residue," "100% natural," "from sustainable agriculture," and "with reduced CO2 emissions"—have flooded the marketplace, often leaving consumers confused and disoriented. In some instances, these claims have even crossed the line into unacceptable "greenwashing" practices.

Redefining the value of organic farming requires highlighting its direct impacts and positive externalities, while also emphasizing the importance of a rigorous certification process for the entire production system. These initial steps are crucial for revitalizing the compelling narrative surrounding organic products, genuinely protecting consumers, and fulfilling the expectations set forth in the "Farm to Fork" strategy for the green transition of European agri-food systems.

EXECUTIVE SUMMARY

The organic surface area

The 2023 data for the national organic Utilized Agricultural Area (UAA) indicate a significant increase, supported by the Common Agricultural Policy (CAP). The organic area has now reached 2.5 million hectares, reflecting a growth of 4.5% compared to 2022, which translates to an additional 106,000 hectares. As a result, Italian organic land now constitutes approximately one-fifth of the total agricultural area (19.8%), marking a one-percentage-point increase from the previous year. This progress brings Italy closer to the European Commission's target of 25% organic UAA by 2030, as outlined in the Farm to Fork strategy.

A comparison with other European countries highlights Italy's unique position, as it boasts a significantly higher share of organic land than major counterparts such as France, Spain, and Germany.

An analysis of the national organic Utilized Agricultural Area (UAA) by crop type reveals that more than two-thirds of this area is dedicated to arable land (42.1%), followed by meadows and pastures (29.7%), permanent crops (22.8%), and vegetables (2.5%).

In 2023, the most significant increase occurred in the meadows and pastures category, which rose by 10.1%, adding over 67,000 hectares compared to 2022. Approximately 80% of this growth was concentrated in the autonomous provinces of Bolzano, Sicily, and Sardinia. This category, along with forage crops, saw a substantial

uptick in its share of organic area last year, continuing the positive trend established over the past two years. Growth in arable crops (+3.4%) was largely driven by industrial crops (+13.1%) and, most notably, by forage crops, which contributed nearly 50,000 hectares more than in 2022 (+11.4%). Forage crops are now the second most important crop type for expanding national organic areas, following permanent pasture. Conversely, protein crops (-7.1%) and cereals (-1.3%) experienced declines.

Horticultural crops also experienced an increase, albeit at a more modest rate of 1.0%. In contrast, permanent crops remained nearly stable, primarily due to declines in vineyards (-2.0%), citrus fruits (-5.8%), and overall fruit production (-8.7%). However, these losses were partially offset by gains in olives (+2.2%) and nuts (+6.8%), particularly driven by the growth of hazelnut and almond orchards, even as chestnut plantings saw a decrease.

From a territorial perspective a gradual yet significant re-balancing in the distribution of organic land across the country is being observed. Currently, 57.9% of the organic area is concentrated in the South, followed by 24.6% in the Centre and 17.5% in the North. However, both the North (+5.5%) and the Centre (+5.3%) experienced higher annual growth rates than the South (+3.9%) in 2023. This trend reflects a long-term pattern, with the organic area in the North and Centre nearly doubling since 2014, while growth in the South has been more moderate at 59.9%.

Organic operators

Overall, the organic sector grew by 1.8% year-on-year in 2023, a significantly more modest rate compared to 7.7% recorded in 2022.

The most notable increase involves approximately 84,000 holdings (exclusive producers and producer/processors), which account for 89.1% of the total number of organic operators. Specifically, while the growth of exclusive producers appears to be levelling off (+1.5%), the very positive trend among producer-processor continues (+3.8%). In 2014, producer-processor represented 11% of organic operators; by 2023, this figure has risen to 15.4%, illustrating how exclusive producers have recognized that combining both activities can yield significant economic advantages.

When examining farms, it is not surprising to find that their geographical distribution mirrors the findings of the Seventh General Census of Agriculture for Italian farms overall: just over 58% of producers are concentrated in the South, primarily in Sicily, Puglia, Calabria, and Campania. However, it is noteworthy that, unlike the total number of farms, the proportion of organic farms is higher in the Centre (21.3%) than in the North (20.5%). This trend highlights a stronger orientation towards organic farming, particularly in the regions of Tuscany, Lazio, and Marche, which collectively account for 19% of organic farms compared to just 13% of total farms.

Household consumption and prices of organic products

In 2023, household consumption of organic products in the large retail sector reached 3.8 billion EUR at current prices, marking a 5.2% increase from the previous year.

This growth represents the highest rate in recent years, although it lags behind the 8.1% increase observed in the broader food industry. In terms of volume dynamics, the consumption of organic products remained stable, rising by just 0.2% compared to 2022, while overall agri-food consumption declined by 1.1%.

The slower growth in the value of household organic expenditure compared to total agri-food seems therefore to be due to a more moderate increase in the prices of organic reference products compared to their conventional counterparts.

As a result, even though total food expenditure on organic products increased by over 191 million EUR in 2023, the share of organic products in the overall value of Italian agri-food goods declined for the second consecutive year, falling to 3.5%. This decrease can be partly attributed to ongoing inflation, which, despite showing signs of slowing, continued to affect the purchasing power of Italian households throughout the year. Consequently, certified products, often priced at a premium, faced greater challenges in maintaining their market share.

Compared to 2022, organic expenditure dynamics indicate a general increase in sales value across nearly all product categories, with notable gains in cereals and cereal products, vegetable oils and fats, fresh eggs, and soft drinks. Additionally, there was a strong recovery in organic wine purchases, which rose by 6.9% following a decline of 3.9% in 2022. In contrast, the categories of meat and cured meat experienced declines of 9.5% and 11.4%, respectively.

From a territorial perspective, the consumption of organic products remains concentrated in the northern

regions, accounting for over 60% of total consumption. In contrast, the "South and Sicily" barely reach 12%, compared to 22% for conventional products. This lower share of organic purchases in the southern regions is likely influenced by the reduced purchasing power of families, who often opt for conventional products—generally cheaper than their organic equivalents—when filling their shopping baskets. However, one might question whether the increased availability of products in these regions that appeal to consumers seeking healthier and simpler options—even if they are not organically produced—could also impact market dynamics.

Among distribution channels, large-scale retail remains the leader in organic product sales, capturing a 65% market share, equivalent to 2.5 billion EUR. This marks an increase of over 178 million EUR (+7.7% compared to 2022), primarily driven by the sales of vegetable oils, fats, and dairy products.

The value of organic product consumption in discount stores continues to grow, demonstrating a 7.0% increase in 2022. Notably, this channel has experienced a remarkable surge in purchases of organic meat and cured meat, with increases of 108.4% and 51.3%, respectively, compared to the previous year. This trend sharply contrasts with the overall decline in these products across all channels, underscoring consumers' heightened price sensitivity.

In 2023, there was a general decline in the prices of several agricultural products, both conventional and organic, including durum and common wheat, following the peak levels recorded in 2022.

Conversely, some organic products experienced price increases last year, such as Arborio rice (+31.4%), fresh milk (+15.9%), and extra virgin olive oil (+14.7%).

Imports of organic products from third countries

In 2023, the volume of organic product imports from third countries surged by 37.8% compared to 2022. This increase spanned all product categories, with vegetables and pulses (+73.5%) and cereals (+67.8%) contributing significantly to the overall growth.

Cereals remain the most imported product category, representing 28.0% of the total volume of organic products from third countries, reflecting a 5.0% increase compared to 2022. This rise is largely attributed to the

resumption of durum wheat imports from Turkey, which had been suspended in 2022 due to rising prices. Durum wheat now accounts for 11.8% of total organic product imports from third countries and contributes 42.9% to the overall annual increase.

Turkey emerged as the leading supplier of organic products, including durum wheat, lentils, and processed fruits and vegetables, followed by Togo (soybeans) and Tunisia (olive oil).



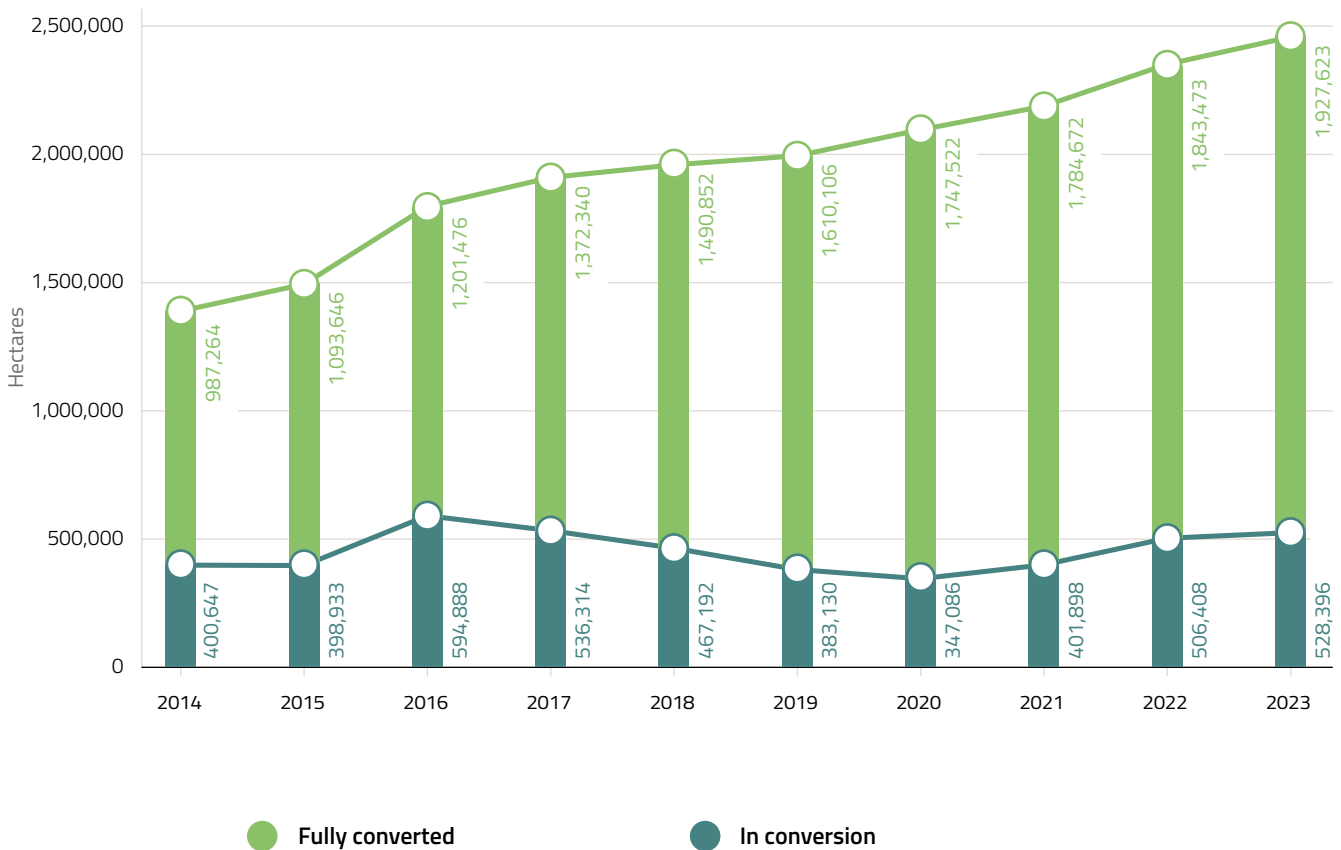
CROP AREAS AND LIVESTOCK

CROP AREAS

As of 31 December 2023, the area under organic farming in Italy has expanded to 2.46 million hectares, reflecting a 4.5% annual growth, i.e. an increase of over 106,000 hectares. Over the past decade, the total area under organic cultivation has surged by 77% (more than 1.07 million hectares), with an average annual growth rate of 6.5%. The share of certified and fully converted areas in 2023 is 78.5% (1,927,623 hectares). This is a stable value compared to the previous year, after the slight increase recorded in 2019-2021.

Trends regarding areas in conversion and maintenance are significantly influenced by the support granted to the sector. This was particularly evident in the early years of the 2014-2022 programming period, which saw a notable increase in in-conversion areas, primarily due to Measure 11 of the Rural Development Programmes (PSR¹). This initiative led to a peak of 30% of the total organic Utilised Agricultural Area (UAA) in 2016 (**Chart 1.1, 1.2 and Table 1.1**).

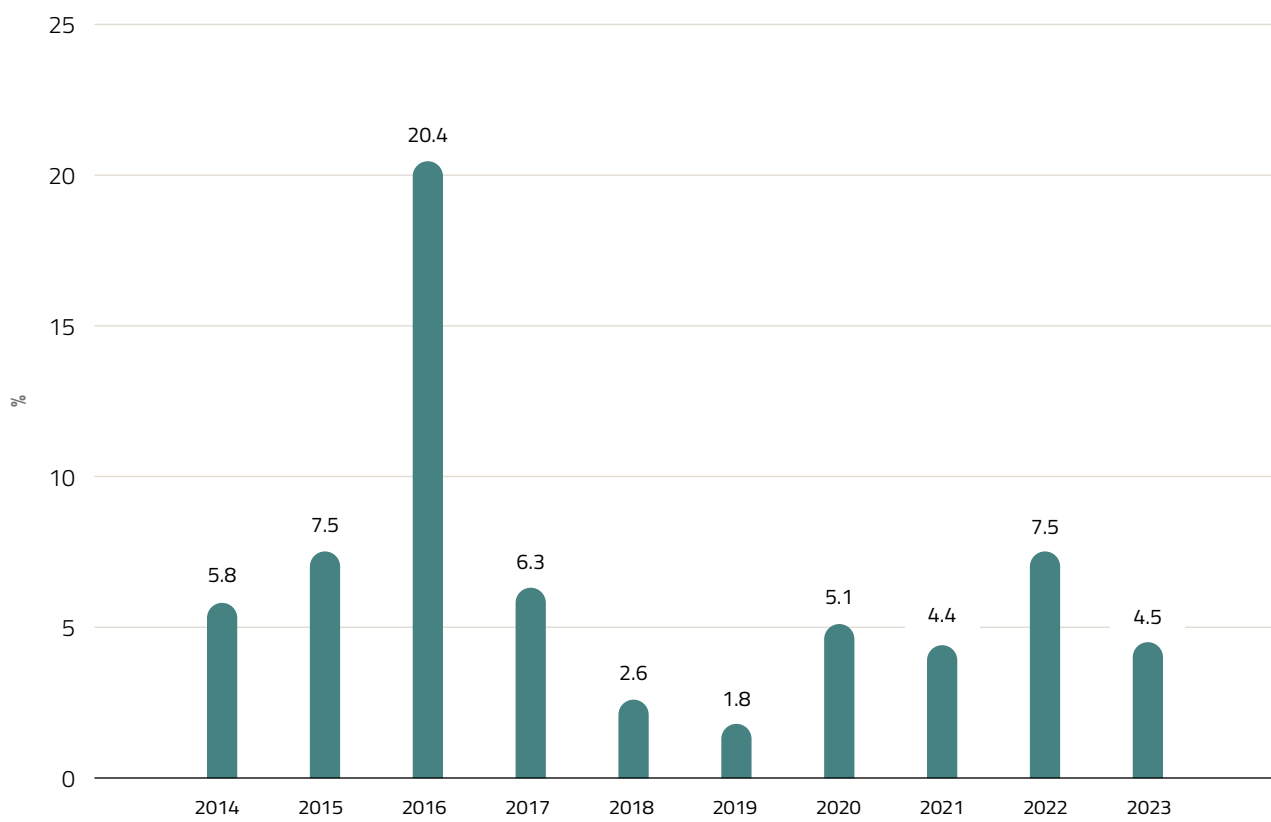
Chart 1.1
Organic areas in Italy
 2014-2023



Source: Compilation by SINAB on Control Bodies data

1. Measure 11 of the Rural Development Programmes 2014-22 included a specific annual payment for the introduction and maintenance of the organic production method.

Chart 1.2
Percentage change in organic areas
 2014-2023



Source: Compilation by SINAB on Control Bodies data

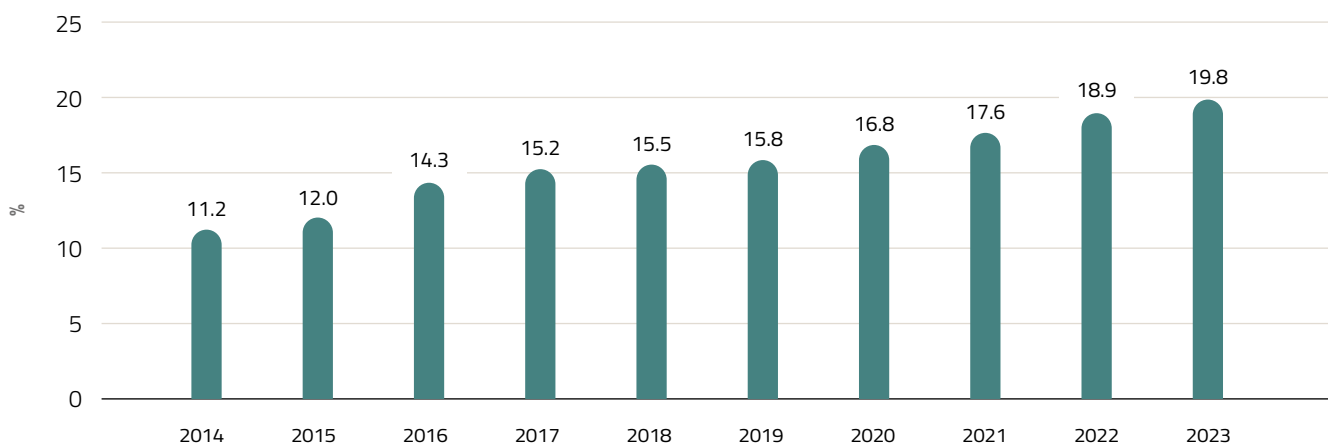
Share of organic areas

In 2023, certified organic areas (both fully converted and in conversion) accounted for 19.8% of the total UAA, according to the latest General Agricultural Census, reflecting an increase of nearly one percentage point compared to 2022.

This percentage is a key indicator of organic farming's expansion, utilised by the European Commission as part

of the *Farm to Fork strategy* to establish a medium- to long-term target: ensuring that at least 25% of EU farmland is organic by 2030. Italy aims to achieve this target earlier, possibly by 2027, through the implementation of its PAN Bio 2024-2026 (National Action Plan for Organic Production) and the instruments of its National CAP Strategic Plan (CAP SP) 2023-27 (**Chart 1.3**).

Chart 1.3
Percentage share of organic areas in the national total
2014-2023



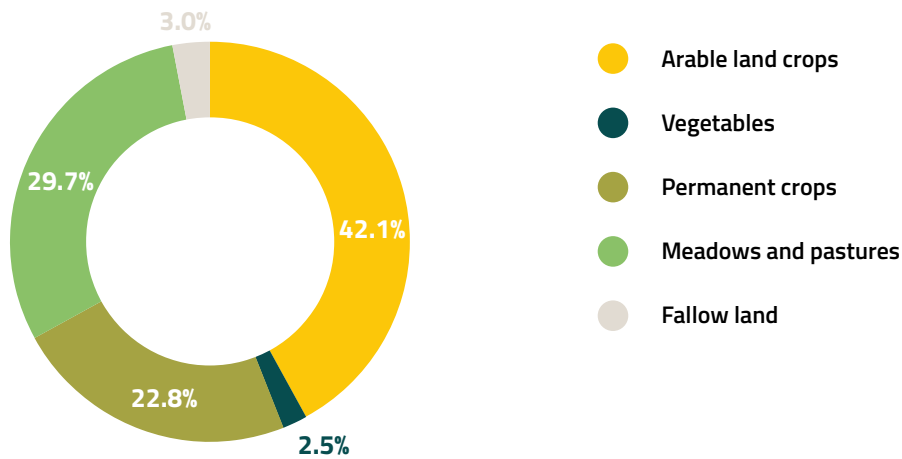
Source: Compilation by SINAB on Control Bodies data

Analysis of organic UAA by crop types

The national organic UAA is composed of arable crops (42.1%), meadows and pastures (29.7%), permanent crops (22.8%), and vegetables (2.5%) (Chart 1.4). In 2023, meadows and pastures saw the most substantial growth (+10.1% compared to 2022), with an increase of 67,014 hectares— which represents 63% of the total

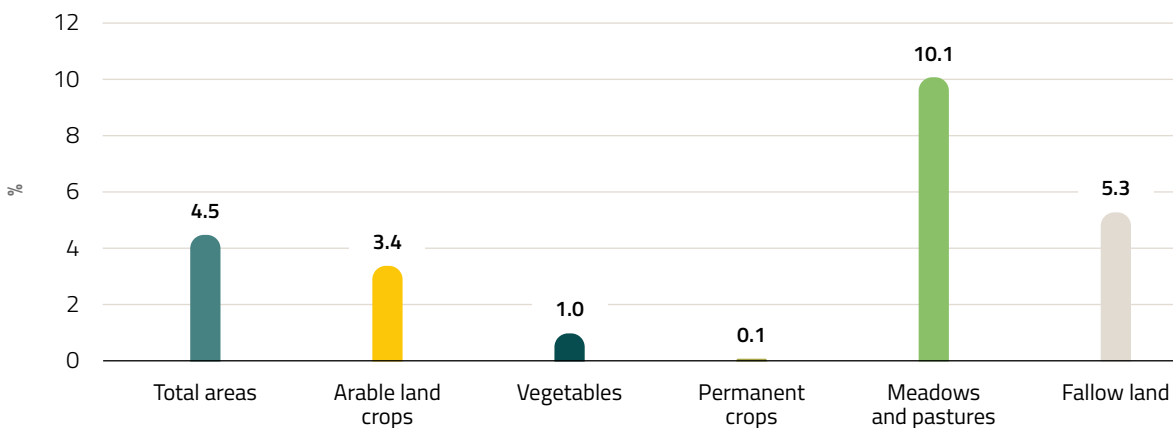
positive annual balance of the national organic area. The Autonomous Province of Bolzano, Sicily, and Sardinia contributed over 80% of the annual growth in meadows and pastures (Table 1.7). Arable crops expanded by 3.4%, vegetables by 1%, while permanent crops remained relatively stable (Chart 1.5 and Table 1.1).

Chart 1.4
Percentage distribution of organic UAA by macrocategory
 2023



Source: Compilation by SINAB on Control Bodies data

Chart 1.5
Percentage change of organic UAA by macrocategory
 2023/2022



Source: Compilation by SINAB on Control Bodies data

Over the last decade, the organic UAA under vegetable crops has more than doubled, but the largest absolute

increases were recorded in the categories of arable crops, meadows and pastures and permanent crops (Table 1.1).

Table 1.1
Organic areas in Italy by macrocategory
2014, 2022, 2023

	ORGANIC AREAS (Hectares)			2023/2014 Change		2023/2022 Change	
	2014	2022	2023	% change	absolute numbers	% change	absolute numbers
TOTAL AREAS	1,387,911	2,349,880	2,456,020	77.0	1,068,109	4.5	106,139
Arable land crops	548,275	1,000,134	1,034,312	88.6	486,037	3.4	34,179
Vegetables*	26,091	59,572	60,175	130.6	34,084	1.0	603
Permanent crops	336,981	558,716	559,368	66.0	222,387	0.1	652
Permanent grassland	404,072	662,252	729,266	80.5	325,195	10.1	67,014
- Meadows and pastures (excl. rough grazing)	226,352	428,279	476,682	110.6	250,330	11.3	48,403
- Rough grazing	177,720	233,973	252,585	42.1	74,865	8.0	18,611
Fallow land	72,492	69,207	72,898	0.6	406	5.3	3,691
Other categories not included in the total**	1,344	352,922	487,002	36.132	485,658	38.0	134,081

* Strawberries' and 'cultivated mushrooms' are included in vegetables

** Not grazed forest and/or wild collection areas (mushrooms, truffles, wild berries) notified by the operator; other.

Source: Compilation by SINAB on Control Bodies data

When looking at the crop categories in more detail, we find that the growth in **arable crops** was driven by industrial crops (+6,619 ha, +13.1%) and, above all, by fodder crops, which, with an additional net contribution of 49,232 ha compared to 2022 (+11.4%), were the second most important crop type after permanent grassland in the growth of national organic areas. In contrast, the areas under cereals (-4 627 ha, -1.3%) and protein crops (-3 411 ha, -7.1%) declined (Table 1.2).

The negative balance for areas under **cereals** was primarily driven by the reduction in rice (-6,582 hectares, -42.3%) and grain maize (-6,230 hectares, -34.3%). In contrast, there were notable increases in the cultivation of durum wheat (+7,085 hectares, +4.3%), common

wheat and spelt (+2,291 hectares, +3.6%), and barley (+2,992 hectares, +7%).

All the **industrial crops**, with the exception of soya, grew substantially, in particular sunflower, rapeseed and oil-seed rape, and the group of aromatic plants.

While the overall area under **vegetables** increased only slightly, some specific dynamics within this category were quite significant

The Brassicas category saw substantial growth, expanding by 4,059 hectares (+46%), largely due to the remarkable rise in cauliflower and broccoli, with broccoli alone making up 96% of this increase. Conversely, areas under tomatoes declined by 1,332 hectares (-16.2%), and pulse production dropped by 16.9%, primarily driven by a reduction in pea cultivation (Table 1.3).

A similar trend is evident in **permanent crops**, where overall areas appeared stable but actually experienced declines in vineyards (-2,660 hectares, -2%), citrus fruit, and other fruit. This decrease was offset by significant growth in olive cultivation (+6,142 hectares, +2.2%) and nut production, particularly hazelnuts and almonds, while chestnut groves saw a reduction.

An overall decline was observed in other fruit categories. Continuing the negative trend from the previous two years, apple and pear production also decreased, with apricots and kiwis also declining in 2023. As regards citrus, organic orange groves saw a loss of over 2,600 hectares (-15.5%), bringing their area back to levels close to those seen in 2014 (**Table 1.4**).

Table 1.2
Organic areas under arable crops (hectares)
2014, 2022, 2023

	2014	2022	2023				2023/2022 Change	
			IN CONVERSION	FULLY CONVERTED	TOTAL ORGANIC	% share of fully converted organic areas	% change	absolute numbers
Total areas	1,387,911	2,349,880	528,396	1,927,623	2,456,020	78.5	4.5	106,139
ARABLE CROP LAND	548,275	1,000,134	176,781	857,531	1,034,312	82.9	3.4	34,179
Cereals	203,686	360,346	59,275	296,445	355,720	83.3	-1.3	-4,627
- Durum wheat	78,604	164,502	29,882	141,705	171,587	82.6	4.3	7,085
- Common wheat and spelt	28,678	64,027	7,668	58,650	66,318	88.4	3.6	2,291
- Rye	193	360	53	486	538	90.2	49.6	178
- Barley	29,687	43,016	8,866	37,142	46,008	80.7	7.0	2,992
- Oats	19,523	27,691	5,153	20,589	25,742	80.0	-7.0	-1,949
- Grain maize	7,685	18,172	1,595	10,347	11,941	86.6	-34.3	-6,230
- Triticale	3,851	4,485	362	2,043	2,405	85.0	-46.4	-2,080
-Other cereals	24,562	22,535	4,805	17,398	22,203	78.4	-1.5	-331
- Rice	10,903	15,559	891	8,086	8,977	90.1	-42.3	-6,582
Protein crops, dry pulses for grain production	29,217	47,880	5,402	39,068	44,469	87.9	-7.1	-3,411
Root crops	1,142	3,666	461	3,388	3,849	88.0	5.0	183
- Potatoes (incl. early and seed potatoes)	920	1,267	315	1,516	1,830	82.8	44.4	563
- Sugar beet (excl. seeds)	72	1,526	66	1,247	1,313	95.0	-14.0	-213
- Other root crops	150	873	81	626	706	88.6	-19.1	-167

	2014	2022	2023				2023/2022 Change	
	TOTAL ORGANIC	TOTAL ORGANIC	IN CONVERSION	FULLY CONVERTED	TOTAL ORGANIC	% share of fully converted organic areas	% change	absolute numbers
Industrial crops	17,890	50,720	6,254	51,085	57,339	89.1	13.1	6,619
Total oil seeds	11,206	36,973	3,704	35,764	39,468	90.6	6.7	2,494
- Sunflower	4,092	14,438	1,571	14,393	15,965	90.2	10.6	1,526
- Soya	5,727	16,250	1,527	13,191	14,718	89.6	-9.4	-1,532
- Rape and turnip rape	783	4,598	422	6,319	6,741	93.7	46.6	2,143
- Linseed	522	1,449	90	1,648	1,738	94.8	19.9	289
- Other Oil seeds	82	238	93	213	307	69.5	28.9	69
Tobacco	79	86	24	93	117	79.5	36.6	31
Hop	3	27	6	24	31	79.1	15.3	4
Total Textile crops	137	438	61	462	522	88.4	19.4	85
- Cotton	0	70	27	65	92	70.7	31.5	22
- Other textile crops	137	368	34	397	431	92.2	17.0	63
Aromatic plants, medicinal and culinary plants	4,389	11,912	2,149	13,237	15,387	86.0	29.2	3,475
Other Industrial crops	2,076	1,284	309	1,505	1,814	82.9	41.3	530
Plants harvested green	256,307	432,218	87,259	394,191	481,450	81.9	11.4	49,232
Total annual plants harvested green	50,711	86,728	29,053	103,337	132,390	78.1	52.7	45,662
- Green maize	941	2,461	3,134	1,665	4,799	34.7	95.0	2,338
- Other annual plants harvested green	49,771	84,267	25,919	101,672	127,591	79.7	51.4	43,324
Temporary grasses and grazings	74,309	146,280	29,060	106,916	135,976	78.6	-7.0	-10,304
Other plants harvested green	131,287	199,210	29,146	183,938	213,084	86.3	7.0	13,873
- Lucerne (Alfalfa)	81,586	152,980	19,337	138,779	158,116	87.8	3.4	5,136
- Other	49,701	46,231	9,809	45,159	54,968	82.2	18.9	8,737
Other arable crops	40,033	105,303	18,131	73,354	91,485	80.2	-13.1	-13,818

Source: Compilation by SINAB on Control Bodies data

Table 1.3
Organic areas under vegetables (hectares)
 2014, 2022, 2023

	2014	2022	2023				2023/2022 Change	
	TOTAL ORGANIC	TOTAL ORGANIC	IN CONVERSION	FULLY CONVERTED	TOTAL ORGANIC	% share of fully converted organic areas	% change	absolute numbers
Total areas	1,387,911	2,349,880	528,396	1,927,623	2,456,020	78.5	4.5	106,139
VEGETABLES	26,091	59,572	9,149	51,026	60,175	84.8	1.0	603
All brassicas (excl. roots)	1,382	8,827	1,983	10,903	12,886	84.6	46.0	4,059
- Cauliflower and broccoli	765	5,761	1,622	8,038	9,660	83.2	67.7	3,898
- Cabbage (white)	381	235	37	179	216	82.8	-7.8	-18
- Other brassicas	236	2,831	323	2,686	3,010	89.3	6.3	179
Leafy or stalk vegetables (excl. brassicas)	4,282	10,435	1,288,5	9,428	10,717	88.0	2.7	282
- Celery	62	125	3	120	123	97.3	-1.5	-2
- Leeks	80	140	12	115	127	90.9	-9.1	-13
- Lettuces	150	467	69	557	626	88.9	34.1	159
- Endives	106	286	22	277	299	92.6	4.3	12
- Spinach	437	1,345	153	1,252	1,405	89.1	4.4	60
- Asparagus	710	1,571	196	1,327	1,523	87.1	-3.1	-49
- Chicory	124	1,140	173	1,476	1,649	89.5	44.7	509
- Artichokes	800	1,287	184	1,115	1,299	85.9	0.9	12
- Other leafy or stalk vegs	1,813	4,074	477	3,190	3,667	87.0	-10.0	-407
Other vegetables cultivated for fruit	6,154	12,729	1,814,5	9,766	11,581	84.3	-9.0	-1,148
- Tomatoes	2,380	8,232	1,069	5,831	6,900	84.5	-16.2	-1,332
- Cucumbers	20	45	9	53	62	85.9	36.5	16
- Gherkins	0	0	0	0	0	-	-	-
- Melons	607	1,001	296	1,148	1,445	79.5	44.3	444
- Water melons	247	355	31	285	317	90.2	-10.9	-39
- Other vegetables cultivated for fruit	2,901	3,096	410	2,449	2,858	85.7	-7.7	-237
Root tuber and bulb vegetables	1,413	2,148	296,1	2,431	2,727	89.1	27.0	579
- Carrots	652	812	54	912	966	94.4	19.0	155
- Garlic	99	221	18	252	270	93.2	22.4	49
- Onions	277	465	52	568	620	91.7	33.3	155
- Shallots	7	6	0	13	13	99.4	122.4	7
- Other root tuber and bulb vegs	378	645	172	687	858	80.0	33.1	214

	2014	2022	2023				2023/2022 Change	
	TOTAL ORGANIC	TOTAL ORGANIC	IN CONVERSION	FULLY CONVERTED	TOTAL ORGANIC	% share of fully converted organic areas	% change	absolute numbers
Pulses	10,961	20,171	2,850,8	14,115	16,966	83.2	-15.9	-3,205
- Peas	4,654	7,547	478	4,645	5,122	90.7	-32.1	-2,425
- Beans	718	1,946	104	1,220	1,324	92.1	-32.0	-622
- Other pulses	5,589	10,678	2,269	8,251	10,520	78.4	-1.5	-158
Other vegetables	1,737	4,523	843,9	3,706	4,550	81.5	0.6	27
Strawberries	118	335	39,1	277	316	87.6	-5.6	-19
Cultivated mushrooms	44	405	33,8	400	433	92.2	7.0	28

Source: Compilation by SINAB on Control Bodies data

Table 1.4
Organic areas under permanent crops (hectares)
 2014, 2022, 2023

	2014	2022	2023				2023/2022 Change	
	TOTAL ORGANIC	TOTAL ORGANIC	IN CONVERSION	FULLY CONVERTED	TOTAL ORGANIC	% share of fully converted organic areas	% change	absolute numbers
Total areas	1,387,911	2,349,880	528,396	1,927,623	2,456,020	78.5	4.5	106,139
PERMANENT CROPS	336,981	558,716	125,047	434,321	559,368	77.6	0.1	652
Fruit	23,213	43,338	7,161,0	32,397	39,558	81.9	-8.7	-3,780
Fruit of temperate climate zones	17,889	30,527	5,056	22,727	27,783	81.8	-9.0	-2,744
Apples	3,950	8,073	508	7,000	7,508	93.2	-7.0	-565
Pears	1,262	2,446	287	2,109	2,396	88.0	-2.0	-50
Peaches	1,739	2,712	590	1,740	2,329	74.7	-14.1	-382
Apricots	2,085	3,831	522	2,006	2,528	79.3	-34.0	-1,303
Nectarines	327	361	142	391	533	73.4	47.6	172
Cherries	2,960	4,506	1,004	3,078	4,082	75.4	-9.4	-424
Plums	678	1,482	204	1,140	1,344	84.8	-9.4	-139
Other fruit of temperate climate zones	4,888	7,117	1,800	5,264	7,064	74.5	-0.7	-53

	2014	2022	2023			2023/2022 Change	
	TOTAL ORGANIC	TOTAL ORGANIC	IN CONVERSION	FULLY CONVERTED	TOTAL ORGANIC	% share of fully converted organic areas	% change absolute numbers
Berries (soft fruit)	513	721	107	523	630	83.0	-12.5 -90
- Blackcurrant	34	59	4	40	44	90.1	-25.6 -15
- Raspberries	71	143	12	73	84	86.3	-40.9 -58
- Other berries	408	519	91	411	502	81.8	-3.3 -17
Fruit of sub-tropical climate zones	4,811	12,091	1,998	9,147	11,145	82.1	-7.8 -946
- Figs	286	806	207	690	897	76.9	11.2 91
- Kiwis	3,486	7,309	885	5,116	6,001	85.3	-17.9 -1,308
- Avocado	34	210	161	253	414	61.2	96.6 203
- Bananas	0	1	0	2	2	100.0	307.8 2
- Other fruit of sub-tropical climate zones	1,005	3,764	745	3,086	3,831	80.6	1.8 67
Nuts	35,132	59,973	15,119,9	48,935	64,055	76.4	6.8 4,082
- Walnuts	1,193	1,840	498	1,453	1,951	74.5	6.0 111
- Hazelnuts	7,748	18,741	5,384	15,791	21,175	74.6	13.0 2,434
- Almonds	10,374	19,645	5,011	16,682	21,693	76.9	10.4 2,049
- Chestnuts	12,035	18,300	3,465	13,661	17,126	79.8	-6.4 -1,174
- Other nuts	3,781	1,448	762	1,349	2,110	63.9	45.8 663
Citrus fruit	29,849	35,056	6,298,8	26,708	33,007	80.9	-5.8 -2,049
- Pomelos and grapefruit	82	533	58	483	541	89.3	1.5 8
- Lemons and acid limes	5,588	8,609	1,319	6,395	7,714	82.9	-10.4 -895
- Oranges	14,482	17,234	3,091	11,468	14,559	78.8	-15.5 -2,675
- Other citrus fruit (small citrus fruit)	9,698	8,680	1,832	8,361	10,193	82.0	17.4 1,513
Vineyards	72,361	135,667	30,081,3	102,925	133,007	77.4	-2.0 -2,660
Wine grape vineyards	70,971	133,140	29,154	100,137	129,291	77.5	-2.9 -3,850
Table grape vineyards	1,391	2,527	927	2,789	3,716	75.0	47.1 1,189
Vineyards for raisin production	0	0	0	0	0	0.0	- -
Olives	170,067	273,624	63,975,3	215,791	279,766	77.1	2.2 6,142
Table olives	284	1,589	504	1,488	1,992	74.7	25.4 403
Oil olives	169,783	272,035	63,472	214,302	277,774	77.1	2.1 5,738
Other permanent crops	6,359	11,057	2,410,8	7,565	9,976	75.8	-9.8 -1,082

Source: Compilation by SINAB on Control Bodies data

Incidence of main crop types in organic farming

As previously mentioned, the share of organic UAA in total national UAA reached 19.8% in 2023; however, this indicator varies across different crop categories.

This variability can be attributed to several factors, primarily the intrinsic agronomic characteristics of each crop species and their capacity to respond positively to organic management. Additionally, local climatic and environmental conditions play a significant role, as do the economic advantages of organic certification and the availability of market outlets for agricultural holdings. Other variables include local governance and the ability of operators to invest in and strengthen the organic sector.

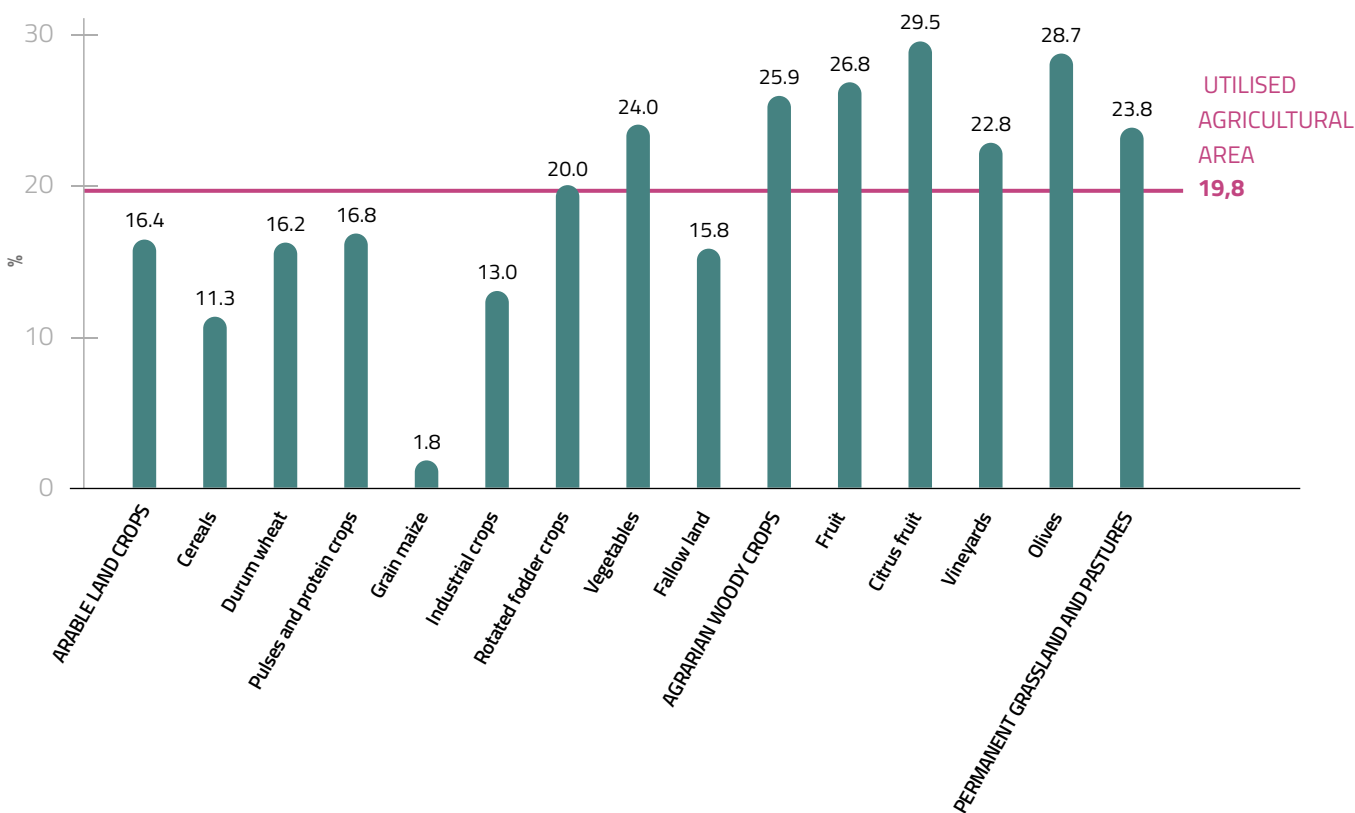
The estimated share of organic areas for the main crop types, based on the latest General Agricultural Census, varied among arable crops (including vegetables)

from 11.3% for cereals to 24% for vegetables (excluding greenhouse crops). Durum wheat, pulses, and protein crops collectively accounted for nearly 16.4% of total arable land.

With a share of almost 26%, agrarian woody organic crops surpassed the national average. The highest percentages were observed for olive trees (28.7%) and citrus fruit (29.5%), although the latter experienced a decline last year.

In the case of permanent grassland and pastures, organic areas accounted for 23.8% of the total. The share of organic land in this category, similar to that of fodder crops, saw significant growth last year, further reinforcing the positive trend observed over the past two years. This growth highlights the potential for enhancing the national supply of inputs for the livestock sector **(Chart 1.6)**.

Chart 1.6
Percentage share of organic areas in the total by main crop types
 2023



Source: Compilation by SINAB on Control Bodies data and 7th General Agricultural Census data, 2020

Regional analysis

The national organic UAA is distributed as follows: 58% in the South, 25% in the Centre and 18% in the North. In 2023, the North (+5.5%) and the Centre (+5.3%) grew at a higher annual rate than the South (+3.9%). Nevertheless, the South recorded the largest absolute increase, adding 53,000 hectares, which accounts for half of the total increase at national level. The same trend can be observed on a long-term basis, with organic areas almost doubling in the North and the Centre compared to 2014 and the South growing more slowly (+59.9%).

The regional analysis reveals that, in 2023, three regions - Sicily, Apulia, and Tuscany - totalled 39% of the national organic UAA, with an additional 30% distributed among Calabria, Emilia-Romagna, Sardinia, and Latium. Considering these seven regions, compared to 2022, both Sicily (+6.7%) and Tuscany (+6.6%) significantly increased their organic areas, while Apulia experienced a decline of 3%. This drop in Apulia is likely due to the delayed launch of rural development calls for the 'SRA29' intervention (Support for Restructuring and Modernization) in the 2023-27 programme, which may have limited the number of new hold-

ings entering the organic agriculture certification scheme. In the remaining regions, which collectively account for just over 30% of the total, the relative annual growth of organic UAA is particularly impressive. The Autonomous Province of Bolzano experienced a remarkable increase of +202.5%, while Valle d'Aosta recorded a growth of +53.4%, both driven entirely by meadows and pastures. Molise also showed significant growth at +68.8%, with increases across various crop types. A substantial growth was also noted in Umbria (+18.2%), Abruzzo (+15.2%), Basilicata (+10.7%), Liguria (+10.4%), Friuli-Venezia Giulia (+5.9%), Marche (+5.7%), and Piedmont (+5.4%). Notably, Piedmont leads among northern regions in the number of certified hectares.

Among the regions that saw a decline in organic UAA compared to 2022, in addition to Apulia, the Autonomous Province of Trento faced a significant drop, losing over 6,000 hectares—mainly from meadows, pastures, and arable crops—accounting for more than 40% of the Province's certified area. Slight reductions were also observed in Veneto (-6.4%), Lombardy (-0.8%), Emilia-Romagna (-0.7%), and Latium (-0.4%) (**Table 1.5**).



Table 1.5
Regional distribution of organic areas in Italy (hectares)
 2014, 2022 and 2023

	2014	2022	2023		2023/2014 Change		2023/2014 Change	
				% in the national total	% change	absolute numbers	% change	absolute numbers
ITALY	1,387,911	2,349,880	2,456,020	100	77.0	1,068,109	4.5	106,139
NORTH	182,490	408,195	430,602	17.5	136.0	248,112	5.5	22,407
CENTRE	316,813	573,785	604,111	24.6	90.7	287,298	5.3	30,326
SOUTH	888,608	1,367,900	1,421,307	57.9	59.9	532,699	3.9	53,407
Piedmont	31,656	54,617	57,567	2.3	81.9	25,911	5.4	2,950
Valle d'Aosta	3,621	1,304	2,000	0.1	-44.7	-1,620	53.4	696
Lombardy	23,352	54,180	53,758	2.2	130.2	30,406	-0.8	-422
Liguria	2,902	7,089	7,823	0.3	169.6	4,921	10.4	734
A.P. Bolzano	7,110	13,875	41,970	1.7	490.3	34,860	202.5	28,094
A.P. Trento	5,476	15,421	8,988	0.4	64.1	3,512	-41.7	-6,433
Veneto	15,773	48,052	44,984	1.8	185.2	29,211	-6.4	-3,067
Friuli-Venezia Giulia	3,701	20,295	21,496	0.9	480.8	17,795	5.9	1,201
Emilia-Romagna	88,899	193,361	192,015	7.8	116.0	103,116	-0.7	-1,346
Tuscany	98,212	229,070	244,293	9.9	148.7	146,081	6.6	15,222
Umbria	51,293	49,348	58,306	2.4	13.7	7,013	18.2	8,958
Marche	57,030	121,416	128,307	5.2	125.0	71,277	5.7	6,891
Latium	110,277	173,950	173,205	7.1	57.1	62,928	-0.4	-745
Abruzzo	25,022	61,332	70,614	2.9	182.2	45,593	15.1	9,282
Molise	4,611	12,325	20,810	0.8	351.4	16,200	68.8	8,485
Campania	20,548	101,759	102,895	4.2	400.8	82,348	1.1	1,136
Apulia	176,998	320,829	311,067	12.7	75.7	134,069	-3.0	-9,763
Basilicata	48,255	119,375	132,089	5.4	173.7	83,834	10.7	12,714
Calabria	160,164	193,616	195,571	8.0	22.1	35,407	1.0	1,955
Sicily	303,065	387,202	413,202	16.8	36.3	110,137	6.7	26,000
Sardinia	149,947	171,462	175,059	7.1	16.7	25,112	2.1	3,597

Source: Compilation by SINAB on Control Bodies data

The growth of organic areas for the main crop types in 2022-2023 varied significantly across the Italian regions and within each region. The following tables illus-

trate the extent of organic areas in 2023 (Table 1.6), and the changes compared to the previous year (Table 1.7).

Table 1.6
Regional distribution of organic areas in Italy by main crop types (hectares)
2023

	Cereals	Protein crops*	Root crops	Industrial crops	Plants harvested green	Other arable crops	Vegetables **	Fruit ***	Nuts	Citrus fruit	Vineyards	Olives	Grassland ****	TOTAL ORGANIC UAA
ITALY	355,720	44,469	3,849	57,339	481,450	91,485	60,175	39,558	64,055	33,007	133,007	279,766	729,266	2,456,020
NORTH	74,363	3,161	1,468	24,469	102,522	16,494	10,960	13,130	7,337	33	29,156	3,658	129,692	430,602
CENTRE	73,720	8,120	1,114	13,781	134,039	19,444	14,518	1,942	3,684	12	32,724	38,836	64,653	430,906
SOUTH	207,637	33,188	1,267	19,089	244,890	55,547	34,697	24,485	53,034	32,962	71,127	237,272	534,921	1,594,512
Piedmont	10,390	316	88	4,058	5,754	2,380	1,471	3,450	4,899	1	4,773	129	18,430	57,567
Valle d'Aosta	5	0	2	2	58	45	2	6	2	0	30	6	1,842	2,000
Lombardy	15,561	642	134	5,613	14,910	1,801	2,012	490	207	9	4,478	599	6,811	53,758
Liguria	66	2	12	84	423	231	52	125	99	2	120	569	5,910	7,823
A.P. Bolzano	252	1	42	144	58	1	56	2,678	37	0	588	9	37,967	41,970
A.P. Trento	29	1	36	16	112	657	107	857	61	0	1,635	91	5,270	8,988
Veneto	10,631	229	181	5,296	3,705	1,950	1,664	2,396	188	7	8,670	671	7,084	44,984
Friuli-Venezia Giulia	1,306	177	37	1,619	3,515	772	344	290	168	0	2,441	75	10,365	21,496
Emilia-Romagna	36,124	1,793	935	7,637	73,987	8,658	5,252	2,838	1,677	14	6,420	1,508	36,014	192,015
Tuscany	42,424	3,178	419	7,297	80,204	11,394	8,202	707	2,149	11	23,534	27,098	25,630	244,293
Umbria	7,707	1,611	69	1,429	11,725	5,674	1,294	294	942	0	1,872	7,494	15,494	58,306
Marche	23,588	3,330	627	5,055	42,109	2,376	5,023	941	593	1	7,317	4,244	23,529	128,307
Latium	16,968	1,927	185	1,405	36,435	5,298	5,383	2,468	11,886	70	2,643	12,211	73,416	173,205
Abruzzo	4,081	668	333	481	10,312	7,498	1,037	286	92	2	6,349	4,357	33,307	70,614
Molise	5,029	908	5	1,132	4,416	3,325	454	221	260	1	697	1,768	2,175	20,810
Campania	12,944	1,533	87	667	20,597	3,423	2,888	1,926	11,138	176	2,336	11,424	31,883	102,895
Apulia	52,303	12,990	110	4,448	26,819	16,904	11,358	7,718	9,281	2,168	20,515	86,651	47,117	311,067
Basilicata	39,043	7,962	71	9,414	20,440	6,673	5,981	1,871	800	1,070	1,014	6,559	28,212	132,089
Calabria	10,046	992	196	344	30,858	3,764	935	3,862	2,826	10,685	3,259	69,009	57,197	195,571
Sicily	56,705	5,638	239	915	72,491	4,271	5,835	5,792	16,372	18,579	32,787	40,338	133,702	413,202
Sardinia	10,518	571	41	283	22,522	4,390	826	342	378	210	1,528	4,953	127,913	175,059

* Protein crops, dry pulses for grain production

** Strawberries' and 'cultivated mushrooms' are included in vegetables

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

**** Grassland includes both 'Meadows and pastures (excl. rough grazing)' and 'Rough grazing'

Source: Compilation by SINAB on Control Bodies data

Table 1.7

Change in regional distribution of organic areas in Italy by main crop types (hectares)

2023/2022 Change

	Cereals	Protein crops*	Root crops	Industrial crops	Plants harvested green	Other arable crops	Vegetables **	Fruit ***	Nuts	Citrus fruit	Vineyards	Olives	Grassland ****	TOTAL ORGANIC UAA
ITALY	-4,627	-3,411	183	6,619	49,232	-13,818	603	-3,780	4,082	-2,049	-2,660	6,142	67,014	106,139
NORTH	-6,152	5	-198	1,726	4,355	-1,293	-1,120	-363	602	10	-252	146	24,719	23,753
CENTRE	8,342	-283	48	1,781	22,241	-1,529	1,581	-2,215	541	47	1,155	2,514	-8,553	28,980
SOUTH	-6,816	-3,133	333	3,112	22,637	-10,996	143	-1,203	2,940	-2,106	-3,563	3,481	50,848	53,407
Piedmont	1,448	-88	-36	1,106	-692	223	-410	512	355	1	535	-214	196	2,950
Valle d'Aosta	-1	0	0	0	-13	13	-1	-1	0	-	-4	6	698	696
Lombardy	-7,454	203	23	1,123	4,686	798	-477	-214	112	8	243	307	278	-422
Liguria	-9	1	5	10	204	26	-40	92	13	1	42	-60	381	734
A.P. Bolzano	76	-7	-4	114	11	-6	-5	-300	11	-	-76	6	28,278	28,094
A.P. Trento	-5	1	-2	0	-25	-1,839	-8	-143	1	0	-16	-18	-4,345	-6,433
Veneto	-86	-131	-183	-781	-256	-203	-332	-297	31	0	-1,042	128	-1,532	-3,067
Friuli-Venezia Giulia	-121	26	-1	154	439	-306	153	-11	79	-	65	-9	766	1,201
Emilia-Romagna	1,608	240	50	-777	4,527	-1,963	-3,097	-245	59	10	-232	98	-4,620	-1,346
Tuscany	5,737	-147	-123	2,162	14,067	-2,094	2,664	-1,400	33	-2	715	1,219	-5,711	15,222
Umbria	166	-28	19	451	1,118	1,791	748	6	138	-	252	-593	3,852	8,958
Marche	1,578	407	14	299	7,964	13	844	138	-296	0	451	530	-6,050	6,891
Latium	-748	-756	88	-354	-5,435	723	422	-714	606	39	-30	1,261	3,975	-745
Abruzzo	-903	51	208	-61	1,192	1,245	276	-1	-19	0	387	-97	6,772	9,282
Molise	1,776	53	4	298	2,289	1,735	135	-34	75	0	128	659	1,156	8,485
Campania	1,089	-858	16	184	4,915	2,246	-473	-1,568	226	1	-407	-1,467	-2,355	1,136
Apulia	-11,160	1,186	15	878	-1,148	-2,676	-1,291	-206	-104	78	1,143	-2,001	6,803	-9,763
Basilicata	-3,100	1,027	47	1,874	3,814	887	2,187	11	97	84	-73	429	5,537	12,714
Calabria	-3,062	-706	23	24	1,224	440	8	-381	305	-38	-258	-25	4,573	1,955
Sicily	6,025	-3,899	35	-43	10,218	-1,244	-808	959	2,139	-2,342	-4,863	5,300	15,400	26,000
Sardinia	2,518	13	-15	-41	132	-13,630	108	18	221	109	380	683	12,963	3,597

* Protein crops, dry pulses for grain production

** Strawberries' and 'cultivated mushrooms' are included in vegetables

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

**** Grassland includes both 'Meadows and pastures (excl. rough grazing)' and 'Rough grazing'

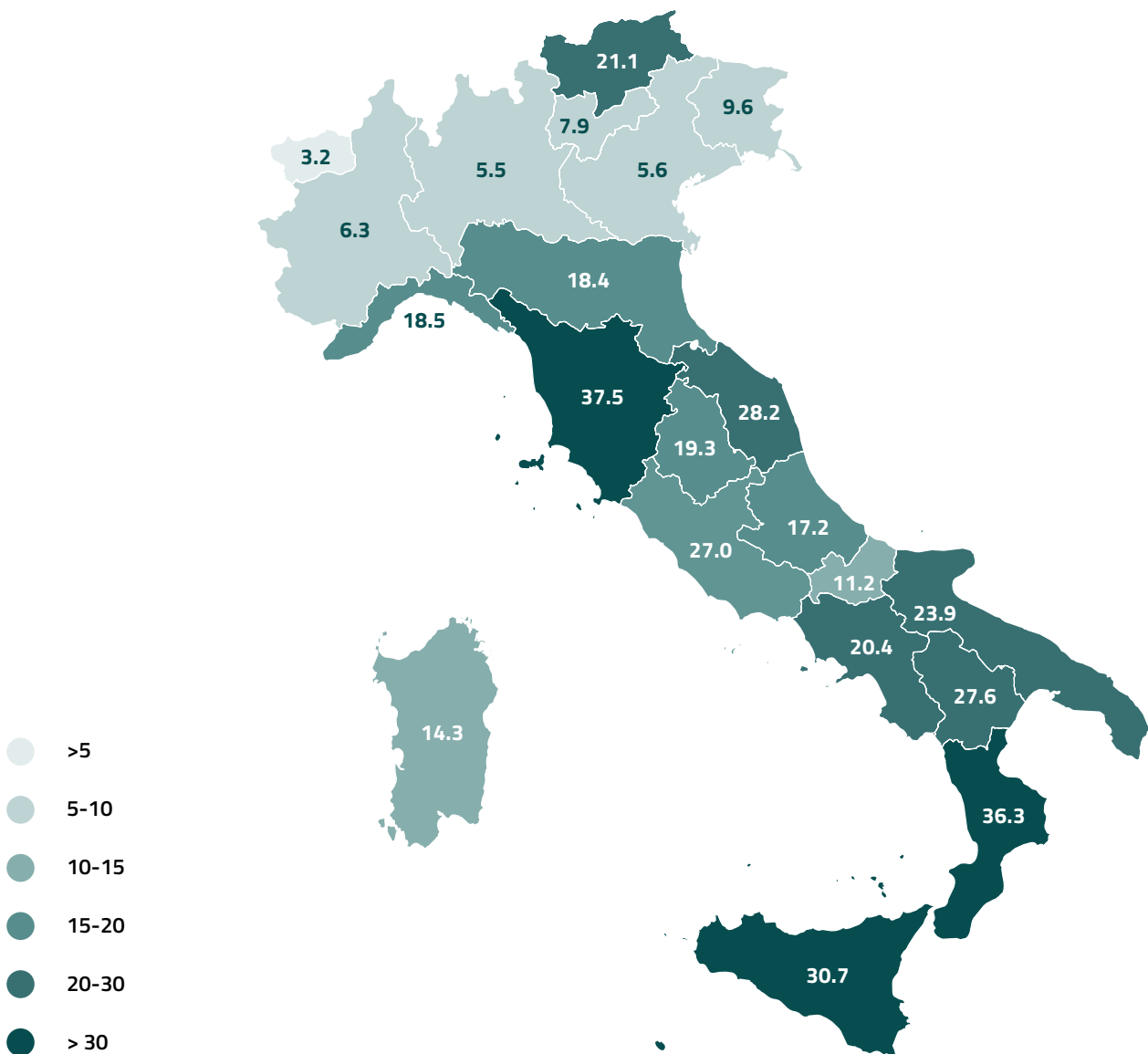
Source: Compilation by SINAB on Control Bodies data

Share of organic areas in the total farmland by region

Monitoring the progress of Italian regions toward the 25% threshold of organic UAA in regional total UAA, as set out in the Farm to Fork Strategy and in the CAP SP 2023-2027, reveals that many areas in the South and Centre have already reached this target. In contrast, regions in the North are lagging significantly behind. This

disparity can be attributed to the higher prevalence of intensive crops cultivated through conventional methods in the North, as well as the presence of areas where farming practices align with agri-environmental measures that support other sustainable agricultural models, such as integrated management (**Infographic 1.1**).

Infographic 1.1
Percentage share of organic areas in the regional total
 2023



Source: Compilation by SINAB on Control Bodies data, and 7th General Agricultural Census data, 2020

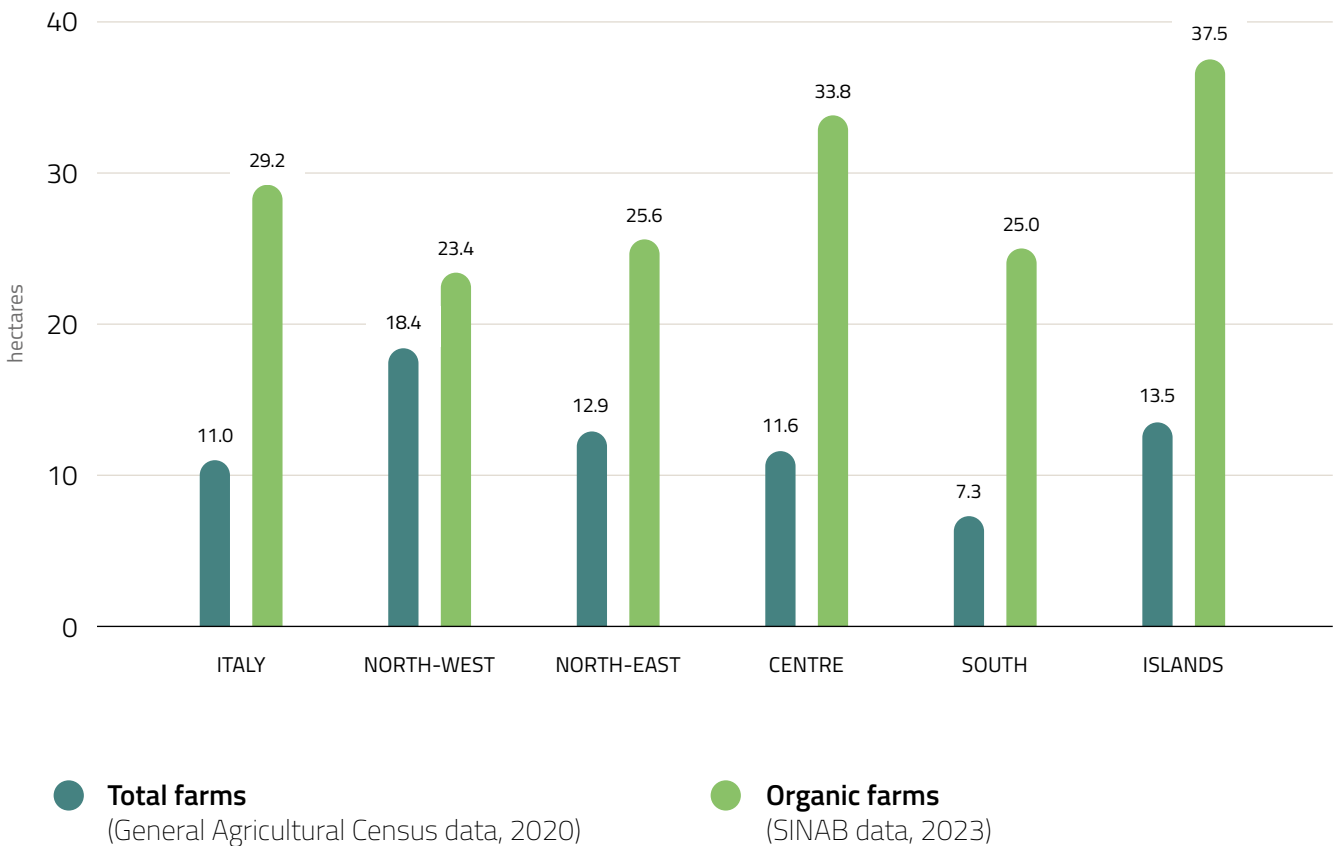
Average farm size by macroarea

In 2023, the average size of Italian organic farms was just over 29 hectares, nearly three times larger than the average size of all Italian farms, which stands at approximately 11 hectares, according to the latest General Agricultural Census.

In the South, the average size of organic farms is more than four times that of all farms, while in the North-West, this difference is considerably smaller. This discrepancy can be

attributed to land fragmentation in the Centre and South, which leads to lower average data for total farms. In contrast, the aggregate data for organic farms reflects more organised agricultural holdings with larger UAA. In addition, from an agronomic perspective, climatic conditions in the Centre and South may be more favourable to organic farming. Also, in the North, larger intensive farms face greater challenges in transitioning to organic farming **(Chart 1.7)**.

Chart 1.7
Average farm size by geographical area
2023



Source: Compilation by SINAB on Control Bodies data, and 7th General Agricultural Census data, 2020

The European context²

In 2022, the EU organic UAA accounted for 10.4% of the total farmland of the 27 Member States, with a certified area of 16.9 million ha. Within the EU-27, Austria led with 706,000 ha of certified organic area, representing 27.5% of its total UAA. The share of organic UAA in Italy was 18.9% in 2022, a higher percentage than in the other main European countries (France, Spain and Germany) that averaged 11% (Chart 1.9).

In 2022, the four largest EU countries by certified area (France, Spain, Italy and Germany) together accounted for 9.7 million ha (+360,063 ha, +3.8% over 2021), namely more than 60% of the EU's organic UAA (Table 1.8 and Chart 1.8).

Italy still ranked first for the number of certified organic farms in 2022, with nearly 83,000 organic farms, accounting for one fifth of the total EU.

Table 1.8

Organic areas in the main European countries (million hectares)

2014, 2021 e 2022

	2014**	2021*	2022*	2022/2014 % change	2022/2021 % change
UE-27	9,79	15,60	16,90	72.6	8.3
Italy	1,39	2,19	2,35	69.3	7.5
France	1,12	2,78	2,88	157.1	3.6
Spain	1,71	2,64	2,68	56.4	1.5
Germany	1,03	1,80	1,86	79.9	3.2
Austria	0,53	0,68	0,69	31.1	1.4

* Data published by the Ministries of Agriculture were used for countries other than Italy

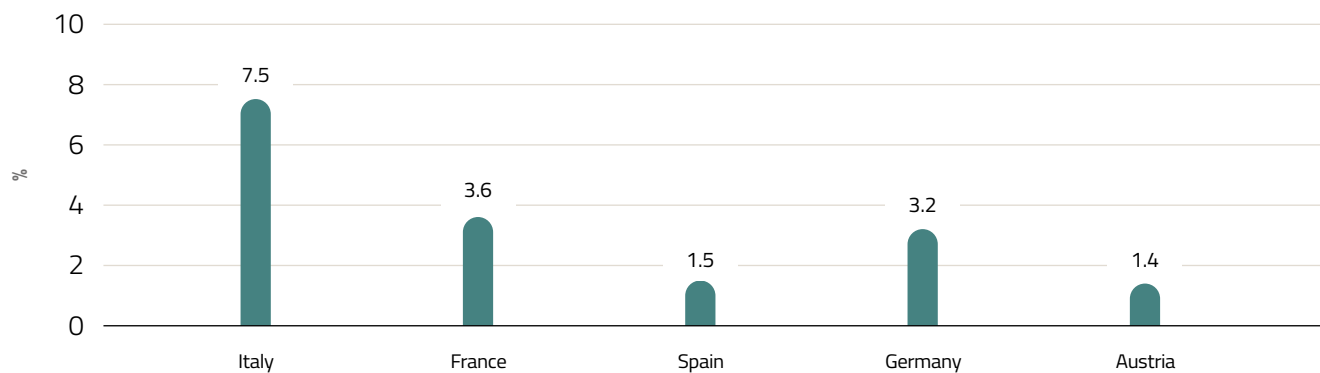
** Eurostat data

Source: Compilation by SINAB

2. Data for 2023 is under collection: Source: SINAB based on data from Ministries of Agriculture, Eurostat and FiBL & IFOAM - Organics International (2024): The World of Organic Agriculture

Chart 1.8**Percentage change of organic areas in the main European countries***

2022/2021

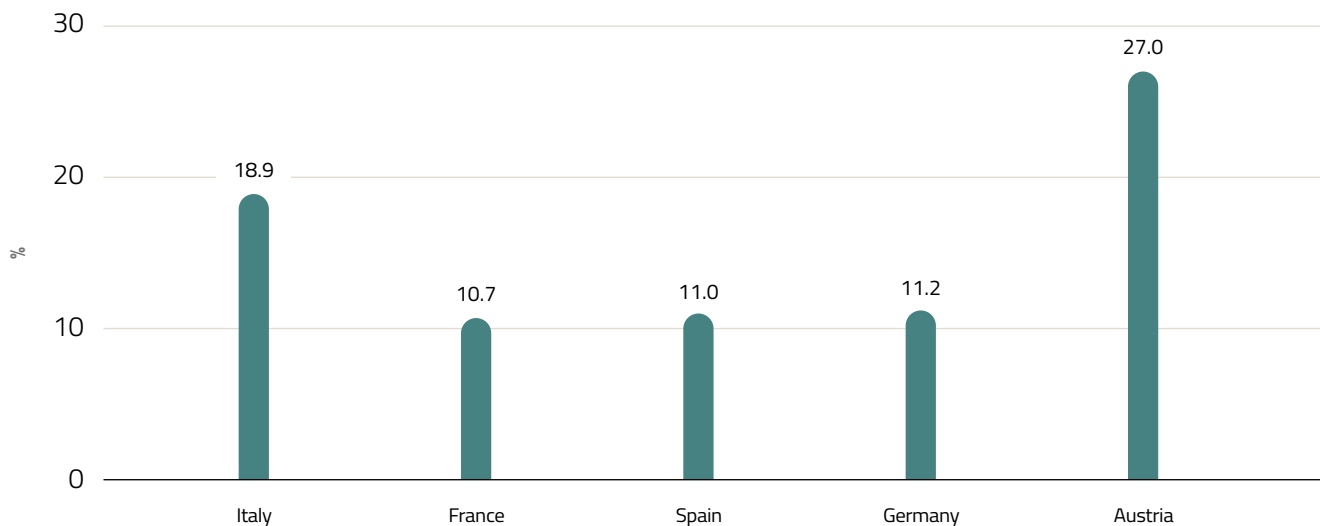


* Data published by the Ministries of Agriculture were used for countries other than Italy

Source: Compilation by SINAB

Chart 1.9**Percentage share of organic areas in the total of the main European countries***

2022



* Data published by the Ministries of Agriculture were used for countries other than Italy

Source: Compilation by SINAB

In France, the increase in the number of certified farms in 2021 followed the growth of the organic UAA (+3.5%), so that the average farm size remained stable at 48 hectares, while the number of operators in Spain (+5.7%) reflected the decrease in the number of hectares cultivated per farm unit (47.9 hectares), already observed since 2020. Farms in Germany grew moderately (+1.2%)

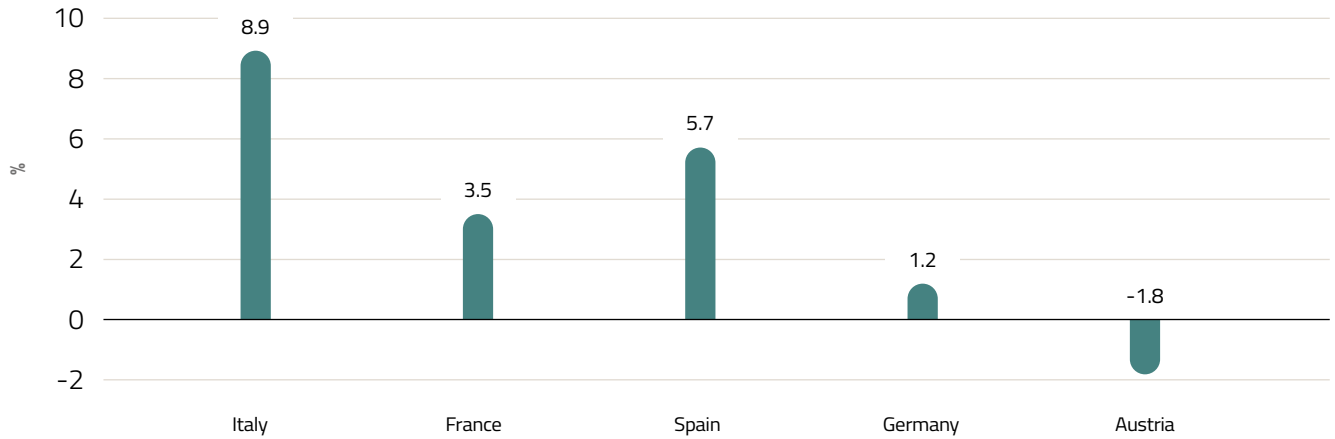
despite a substantial increase in certified organic areas, leading to an average size of 50.7 hectares in 2022. The situation was different in Austria, where the number of farms decreased compared to 2021 (-1.8%), while the certified areas showed a positive trend (+9.667 ha, +1.4%) and the average farm size increased to 26.2 ha (Table 1.9, Charts 1.10 and 1.11).

Table 1.9
Number of organic farms in the main European countries
2014, 2021 e 2022

FARMS	2014	2021	2022	2022/2014 % change	2022/2021 % change
UE-27	254,115	378,226*	419,112*	64.9	10.8
Italy	48,662	75,874	82,627	69.8	8.9
France	26,466	58,474	60,522	128.7	3.5
Spain	30,602	52,861	55,851	82.5	5.7
Germany	23,717	36,236	36,688	54.7	1.2
Austria	22,184	26,720	26,251	18.3	-1.8

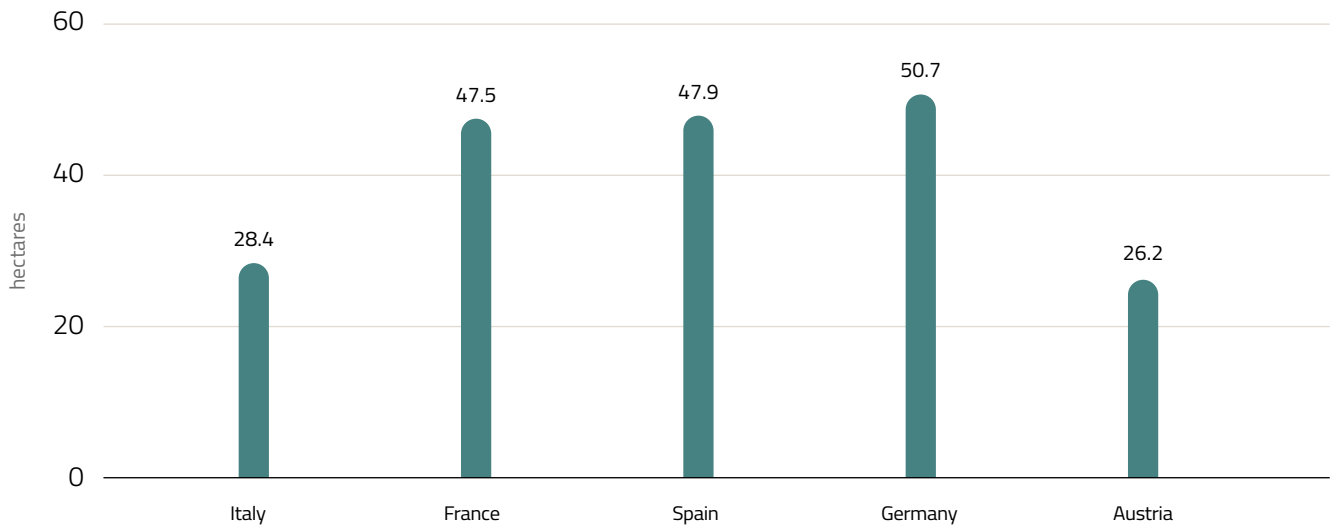
Source: Compilation by SINAB on Eurostat and FIBL data

Chart 1.10
Percentage change of organic farms in the main European countries
2022/2021



Source: Compilation by SINAB

Chart 1.11
Average farm size in the main European countries
2022



Source: Compilation by SINAB on Eurostat and Ministries of Agriculture data

ANIMAL HUSBANDRY

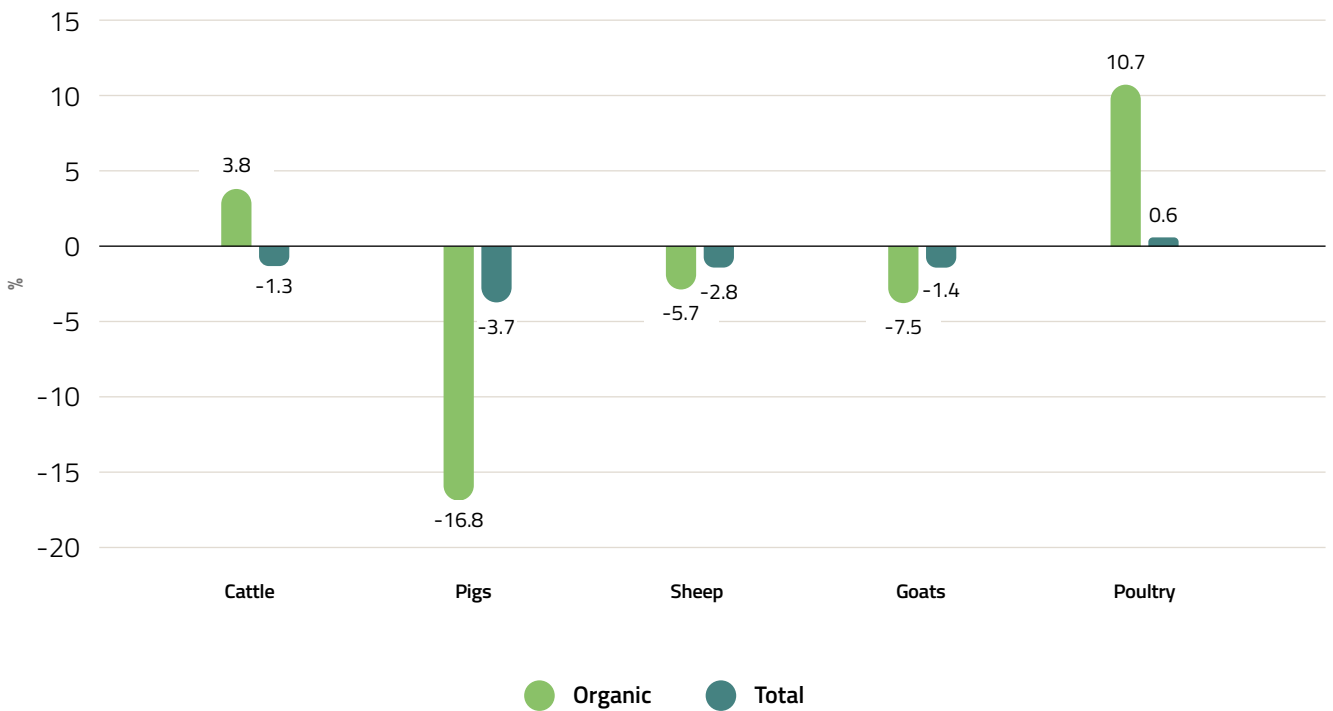
Organic livestock numbers

In 2023, the downward trend in total livestock numbers continued, also impacting organic production to varying extents across different sectors.

Compared to 2022, the poultry sector showed a positive development (+658 068 head, +10.7%), with a 90.6% increase in broilers and layers and a 95.1% increase in all poultry over the decade.

The number of cattle continued to rise in 2023 (17,025 heads, +3.8%), reflecting the steady growth seen over the past decade. Since 2014, the total number of bovine animals, including dairy cows, has surged by 110.5%, driven by substantial investments in the sector **(Chart 1.12)**.

Chart 1.12
Percentage change in the number of heads per farmed species
 2023/2022



Source: Compilation by SINAB

The pig, goat and sheep sectors as a whole showed a steady decline in numbers over time.

The organic pig population fell by 16.8% on an annual basis, reaching 54,591 heads. The increase in the previous year was +12.1%, while the number of animals has almost tripled since 2014.

After the increase recorded in 2022, the goat stock declined (-7.5%), reaching approximately 100,000 heads, that is, 6.7% more compared to 2014.

The sheep stock dropped by 5.7%, further reinforcing a long-term decline, with the total number of organic sheep and lambs reduced by more than 200 thousand animals (-28.9%) between 2014 and 2023.

Apiculture also suffered in 2023, with a -6.9% loss of hives compared to the previous year, although the number of certified organic operators active in this sector remained almost unchanged (**Table 1.10**).

Table 1.10
Number of Live animals
2014, 2022 and 2023

		2014	2022	2023	2023/2014 change		2023/2022 change	
					% change	absolute numbers	% change	absolute numbers
Cattle	Total	5,537,523	5,494,046	5,420,547	-2.1	-116,976	-1.3	-73,499
	Organic	222,924	452,320	469,345	110.5	246,421	3.8	17,025
Pigs	Total	8,535,978	8,440,287	8,130,509	-4.8	-405,469	-3.7	-309,778
	Organic	19,900	65,590	54,591	174.3	34,691	-16.8	-10,999
Sheep	Total	5,636,451	6,251,701	6,077,817	7.8	441,366	-2.8	-173,884
	Organic	757,746	571,540	538,751	-28.9	-218,995	-5.7	-32,789
Goats	Total	728,172	931,976	918,719	26.2	190,547	-1.4	-13,257
	Organic	92,647	106,857	98,828	6.7	6,181	-7.5	-8,029
Poultry*	Total	165,026,943**	146,220,350	147,035,356	-10.9	-17,991,587	0.6	815,006
	Organic	3,490,702	6,151,325	6,809,393	95.1	3,318,691	10.7	658,068
Horses	Total	13,404	22,627	25,567	90.7	12,163	13.0	2,940
	Organic	12,970	22,627	25,567	97.1	12,597	13.0	2,940
Apiaries (number of hives)	Total	661,238***	1,573,967	1,537,869	132.6	876,631	-2.3	-36,098
	Organic	146,692	233,306	217,111	48.0	70,419	-6.9	-16,195

* Includes broilers and laying hens

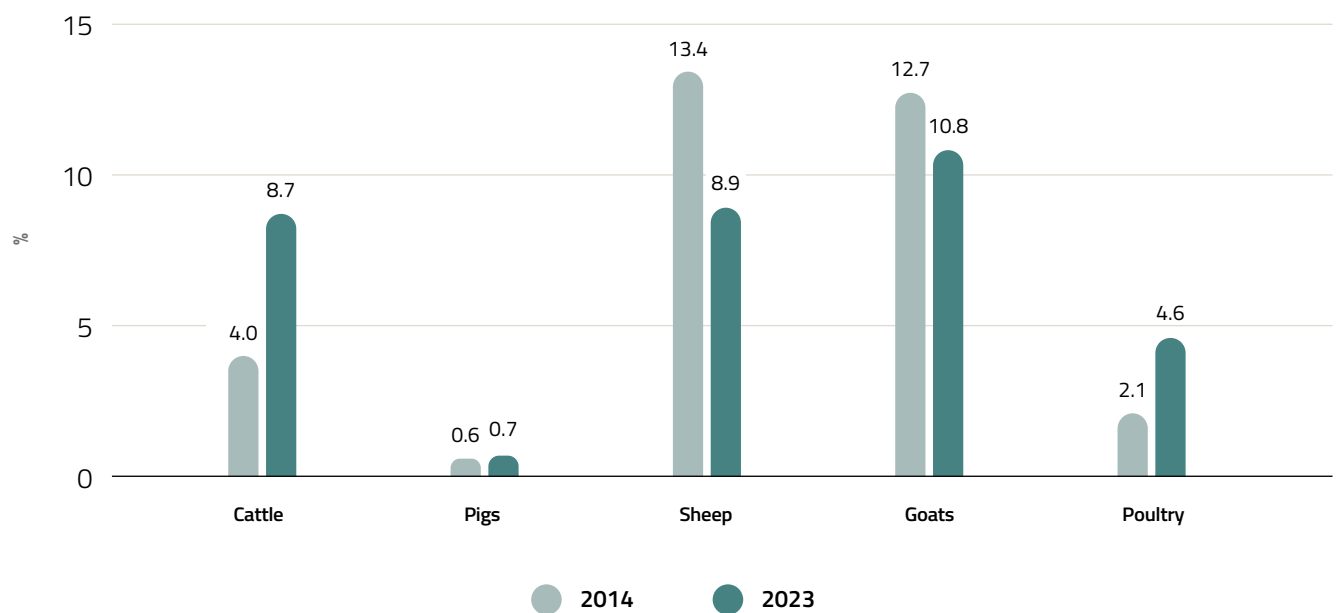
Source: Compilation by SINAB on Control Bodies data. For national totals: National Livestock Register and **ISTAT SPA data, 2013 and *** General Agricultural Census data, 2010

Incidence of organic livestock in total livestock numbers

As regards the share of organic livestock in total livestock numbers, the most prominent categories were goats (10.8%), sheep (8.9%) – despite a decrease over the past decade. Cattle accounted for 8.7% and saw a significant increase. The poultry sector also saw an increase in

the share of organic animals in the total over the decade. In contrast, the share of organic pigs remained extremely low at just 0.7% (Chart 1.13). The share of organic equines was 6.5%, while organic bee-hives were even more significant accounting for 14.1%.

Chart 1.13
Percentage share of organic heads in total livestock numbers
 2014 and 2023



Source: Compilation by SINAB

OPERATORS

ORGANIC OPERATORS IN ITALY

2023 Overview

Based on the compilation of data received from Control Bodies, Regional Authorities, and SIB, the number of organic operators in Italy grew by 1.8 per cent in 2023 compared to 2022. This marks a significantly slower growth compared to the 7.7% increase recorded in 2022. The total number of organic operators rose by 1,642, reaching a total of 94,441.

With the exception of importers³, who saw a decrease of 1.5% (a minimal decrease in absolute numbers), all

categories of operators experienced moderate growth. The double-digit growth recorded in 2022 by exclusive producers seemed to remain stable in 2023 (+1,642 units, or +1.5% compared to 2022). Meanwhile, the upward trend in recent years for producers/processors continued (+ 532 units, or + 3.8% compared to 2022). Finally, exclusive processors show the most moderate growth in percentage, compared to 2022 and 2014 levels (**Table 2.1**).

Table 2.1
Organic operators by category in Italy
2014, 2022, 2023

	2014	2022	2023	2023/2014 % change	2023/2022 % change
TOTAL	55,433	92,799	94,441	70.4	1.8
Exclusive producers	42,546	68,605	69,637	63.7	1.5
Exclusive processors	6,524	9,614	9,701	48.7	0.9
Producers/Processors	6,104	13,998	14,530	138.0	3.8
Importers*	259	582	573	121.2	-1.5

Source: Compilation by SINAB on Control Bodies, Regional Authorities and SIB data

3. The term 'importer' is used in this Report to refer only to companies registered in the national list of importers of organic products from third countries, in accordance with Regulation (EU) 2018/848 and its implementing rules (EU) 2021/2307 of 21 October 2021. For a more complete definition of the category of 'importers', we refer to chapter 5. This category includes both exclusive importers and importers who also carry out production and/or processing activities.

Over the past decade, the number of organic operators in Italy has surged by 70.4%, that is to say, approximately 39,000 additional units. This increase has occurred across the country, with the exception of Valle d'Aosta.

Notably, in Calabria (+18.3%) and Sardinia (+6.5%), the growth in the number of organic operators has been relatively limited, reflecting the prevailing trends in the South compared to other regions (**Table 2.2**).

Table 2.2**Regional distribution and distribution by macroarea of organic operators in Italy**

2014, 2022, 2023

	2014	2022	2023	2023/2014 % change	2023/2022 % change
ITALY	55,433	92,799	94,441	70.4	1.8
North	12,241	22,053	22,287	82.1	1.1
Centre	10,807	18,938	19,580	81.2	3.4
South	32,385	51,808	52,574	62.3	1.5
Piedmont*	2,120	3,438	3,399	60.3	-1.1
Valle d'Aosta	91	68	47	-48.4	-30.9
Liguria	389	562	579	48.8	3.0
Lombardy	1,700	3,260	3,202	88.4	-1.8
A.P. Bolzano	1,092	1,855	2,677	145.1	44.3
A.P. Trento	652	1,256	1,130	73.3	-10.0
Veneto*	1,880	3,790	3,546	88.6	-6.4
Friuli-Venezia Giulia	441	1,125	1,131	156.5	0.5
Emilia-Romagna*	3,876	6,699	6,576	69.7	-1.8
Tuscany	4,156	7,089	7,675	84.7	8.3
Umbria	1,217	1,939	2,110	73.4	8.8
Marche*	2,187	4,224	4,195	91.8	-0.7
Latium	3,247	5,686	5,600	72.5	-1.5
Abruzzo	1,461	2,374	2,482	69.9	4.5
Molise	230	515	783	240.4	52.0
Campania	2,016	7,322	7,473	270.7	2.1
Apulia*	6,599	11,408	11,362	72.2	-0.4
Basilicata	1,225	3,234	3,280	167.8	1.4
Calabria	8,787	10,442	10,396	18.3	-0.4
Sicily	9,660	14,072	14,235	47.4	1.2
Sardinia	2,407	2,441	2,563	6.5	5.0

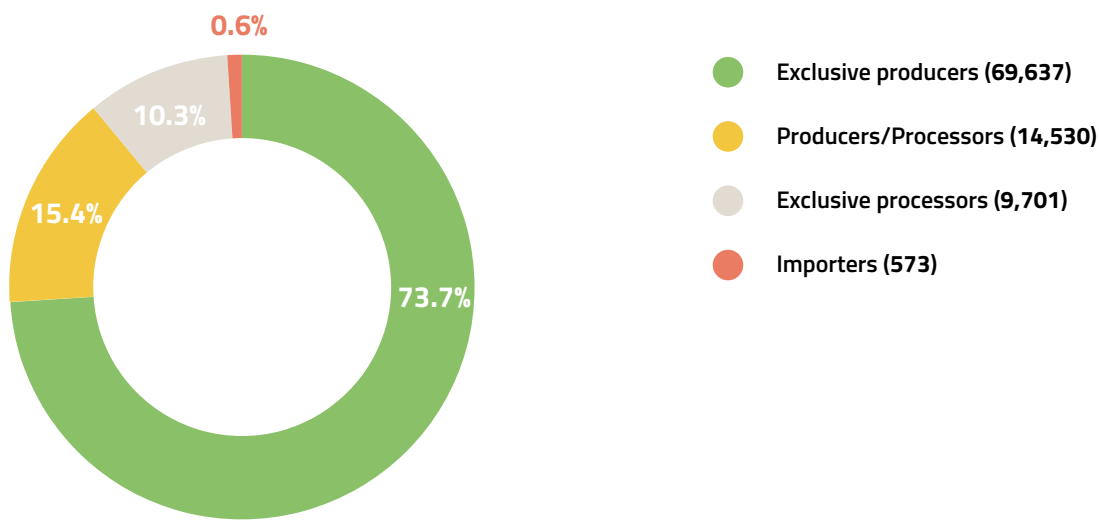
* Data provided by the Regional Authorities

Source: Compilation by SINAB on Control Bodies, Regional Authorities and SIB data

Chart 2.1 shows that exclusive producers represent the largest category (73.7% of the total), but the surge in producers/processors, which rose from 11.0% in 2014 to 15.4% in 2023, indicates that, over time, exclusive producers have realised that combining the two activities leads to an economic advantage.

In particular, within the category of **producers and processors**, Tuscany stands out as the region with the highest number of operators (2,228, or 15.3% of the total), thus leading the way in the combined activities of organic production and processing.

Chart 2.1
Share of different categories of organic operators in Italy
 2023



Source: Compilation by SINAB on Control Bodies data, Regional Authorities and SIB data

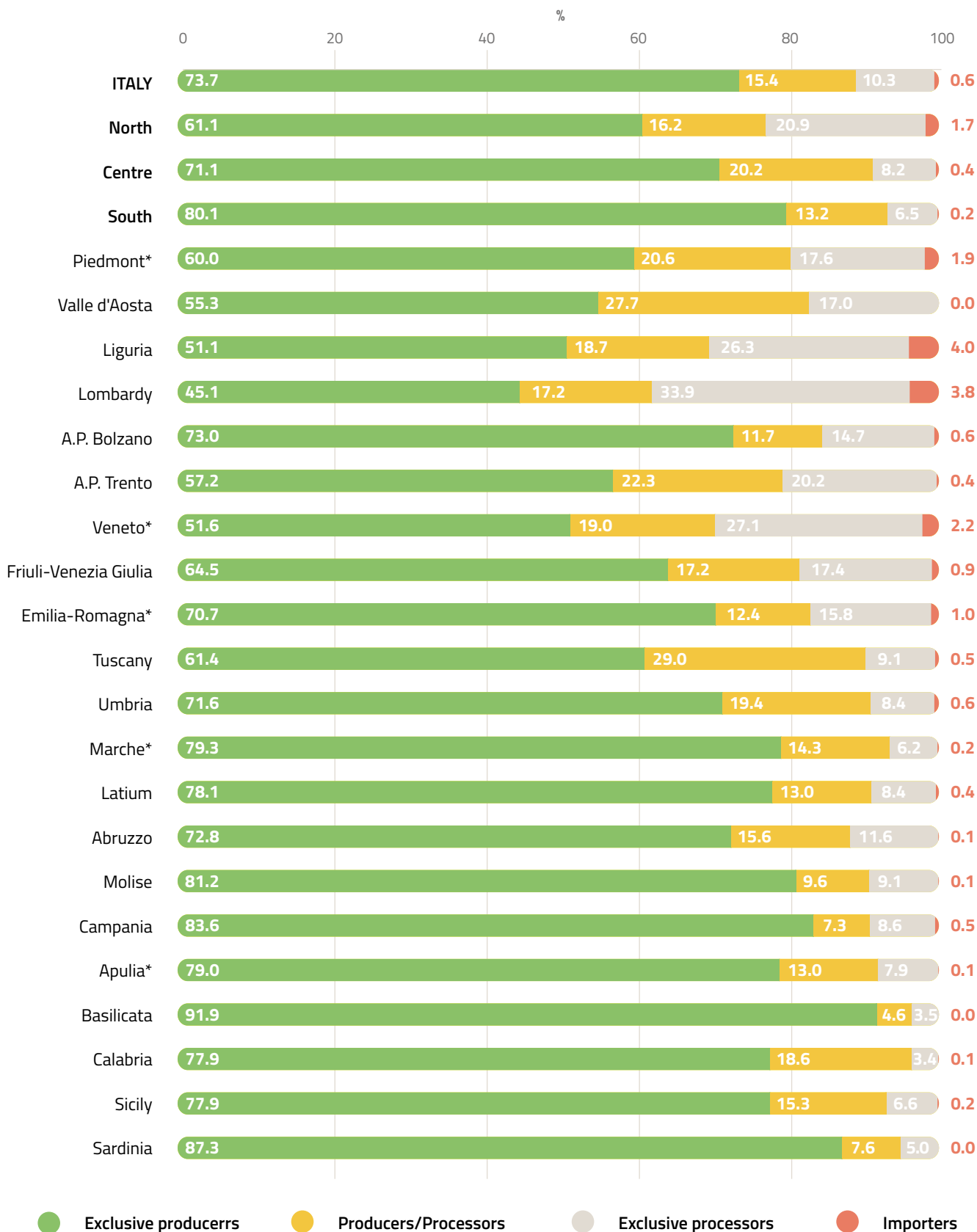
It is worth noting that 89% of the total number of organic operators represents agricultural holdings (**exclusive producers, producers/processors and producers who are also importers and processors**). Consequently, the share of this category in the total number of operators

is higher in Southern Italian regions compared to the North, where there is a greater prevalence of operators who are processors (exclusive processors) and importers (**Chart 2.2 and Table 2.3**).

Chart 2.2

Percentage share of different types of organic operators by region

2023



* Data provided by the Regional Authorities

Source: Compilation by SINAB on Control Bodies, Regional Authorities and SIB data

Table 2.3**Regional distribution and distribution by macroarea of organic operators in Italy by type of operator**
2023

	Exclusive producers	Exclusive processors	Producers/Processors	Importers	TOTAL
ITALY	69,637	9,701	14,530	573	94,441
North	13,617	4,665	3,619	386	22,287
Centre	13,925	1,607	3,964	84	19,580
South	42,095	3,429	6,947	103	52,574
Piedmont*	2,040	597	699	63	3,399
Valle d'Aosta	26	8	13	0	47
Liguria	296	152	108	23	579
Lombardy	1,443	1,086	551	122	3,202
A.P. Bolzano	1,954	394	313	16	2,677
A.P. Trento	646	228	252	4	1,130
Veneto*	1,831	962	674	79	3,546
Friuli-Venezia Giulia	730	197	194	10	1,131
Emilia-Romagna*	4,651	1,041	815	69	6,576
Tuscany	4,712	697	2,228	38	7,675
Umbria	1,511	177	410	12	2,110
Marche*	3,326	260	600	9	4,195
Latium	4,376	473	726	25	5,600
Abruzzo	1,806	287	387	2	2,482
Molise	636	71	75	1	783
Campania	6,244	639	549	41	7,473
Apulia*	8,981	892	1,473	16	11,362
Basilicata	3,013	116	151	0	3,280
Calabria	8,094	355	1,938	9	10,396
Sicily	11,083	940	2,178	34	14,235
Sardinia	2,238	129	196	0	2,563

* Data provided by the Regional Authorities

Source: Compilation by SINAB on Control Bodies, Regional Authorities and SIB data

Importers were the sole category of operators to experience a slight decrease (-1.5%) in 2023 compared to 2022. An analysis of the different types of operators in this

category shows that almost all (95.5%) were involved in both processing and import activities (**Table 2.4**).

Table 2.4

Regional distribution and distribution by macroarea of organic operators in Italy by type of operator 2023

	Exclusive importers (C)	Producers who are also Importers (AC)	Processors who are also Importers(BC)	Producers who are also Processors and Importers (ABC)	TOTAL
ITALY	2	2	547	22	573
North	1	2	371	12	386
Centre	1	-	79	4	84
South	-	-	97	6	103
Piedmont*	-	-	58	5	63
Valle d'Aosta	-	-	-	-	-
Liguria	-	1	22	-	23
Lombardy	-	-	121	1	122
A.P. Bolzano	-	-	16	-	16
A.P. Trento	-	-	4	-	4
Veneto*	-	1	76	2	79
Friuli-Venezia Giulia	1	-	9	-	10
Emilia-Romagna*	-	-	65	4	69
Tuscany	-	-	36	2	38
Umbria	-	-	12	-	12
Marche*	-	-	8	1	9
Latium	1	-	23	1	25
Abruzzo	-	-	2	-	2
Molise	-	-	1	-	1
Campania	-	-	40	1	41
Apulia*	-	-	15	1	16
Basilicata	-	-	-	-	-
Calabria	-	-	7	2	9
Sicily	-	-	32	2	34
Sardinia	-	-	-	-	-

Source: Compilation by SINAB on SIB data

Agricultural holdings

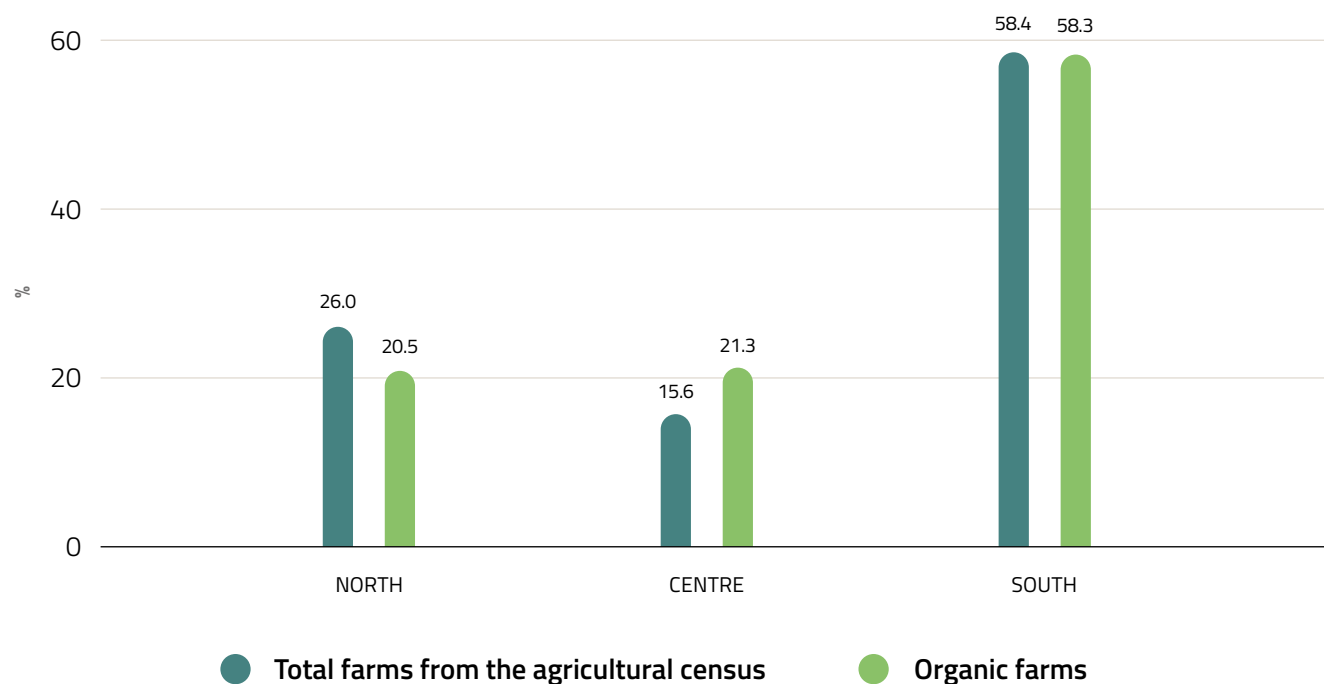
The geographical distribution of **organic farms** in Italy closely aligns with the trends identified in the 7th General Agricultural Census for all Italian agricultural holdings. This is particularly evident when examining only organic farms, which consist of exclusive producers as well as producers who are also processors and/or importers. In fact, the South—primarily Sicily, Apulia, Calabria, and Campania—comprises slightly over 58% of all organic producers. Interestingly, unlike the total number of farms (**Chart 2.3**), the share of organic farms is higher in Central Italy (21.3%) compared to the North (20.5%). This is particularly true in the regions of Tuscany, Latium, and Marche, where organic farms make up 19% of the total, in contrast to just 13% of all farms.



Chart 2.3

Distribution of organic and total farms in Italy by macroarea

2023 (organic farms) and 2020 (total farms)



Source: Compilation by SINAB on Control Bodies, Regional Authorities and SIB data and 7th General Agricultural Census data

In 2023, the central regions recorded the largest increase in the number of organic farms compared to 2022 (3.9%, 672 more producers), led by Umbria (10%) and Tuscany (8.7%).

In the North, nearly all the regions experienced a decline, with the exception of Liguria, Friuli-Venezia Giulia and, especially the Province of Bolzano, where the number of certified farms increased significantly, rising by 51% and adding 766 more producers compared to 2022.

In the South, the number of organic producers grew

across all regions except for Apulia and Calabria. Molise recorded the largest relative increase nationwide (+63.4%). Over the past decade, several regions that do not rank among the top for the number of organic farms - such as Molise, Basilicata, the Autonomous Province of Bolzano, Friuli-Venezia Giulia, Lombardy, and Veneto - have shown significant growth. Additionally, Campania has made remarkable strides, with its number of organic farms increasing nearly fourfold during this period (Table 2.5).

Table 2.5
Regional distribution of organic farms in Italy
 2014, 2022, 2023

	2014	2022	2023	2023/2014 % change	2023/2022 % change
ITALY	48,662	82,627	84,191	73.0	1.9
North	8,882	16,997	17,250	94.2	1.5
Centre	9,605	17,221	17,893	86.3	3.9
South	30,175	48,409	49,048	62.5	1.3
Piedmont*	1,657	2,748	2,744	65.6	-0.1
Valle d'Aosta	84	42	39	-53.6	-7.1
Liguria	267	390	405	51.7	3.8
Lombardy	968	2,008	1,995	106.1	-0.6
A.P. Bolzano	838	1,501	2,267	170.5	51.0
A.P. Trento	534	1,097	898	68.2	-18.1
Veneto*	1,218	2,722	2,508	105.9	-7.9
Friuli-Venezia Giulia	307	905	924	201.0	2.1
Emilia-Romagna*	3,009	5,584	5,470	81.8	-2.0
Tuscany	3,684	6,389	6,942	88.4	8.7
Umbria	1,075	1,746	1,921	78.7	10.0
Marche*	1,970	3,928	3,927	99.3	0.0
Latium	2,876	5,158	5,103	77.4	-1.1
Abruzzo	1,253	2,072	2,193	75.0	5.8
Molise	189	435	711	276.2	63.4
Campania	1,664	6,644	6,794	308.3	2.3
Apulia*	6,028	10,659	10,455	73.4	-1.9
Basilicata	1,143	3,123	3,164	176.8	1.3
Calabria	8,541	10,072	10,034	17.5	-0.4
Sicily	9,024	13,094	13,263	47.0	1.3
Sardinia	2,333	2,310	2,434	4.3	5.4

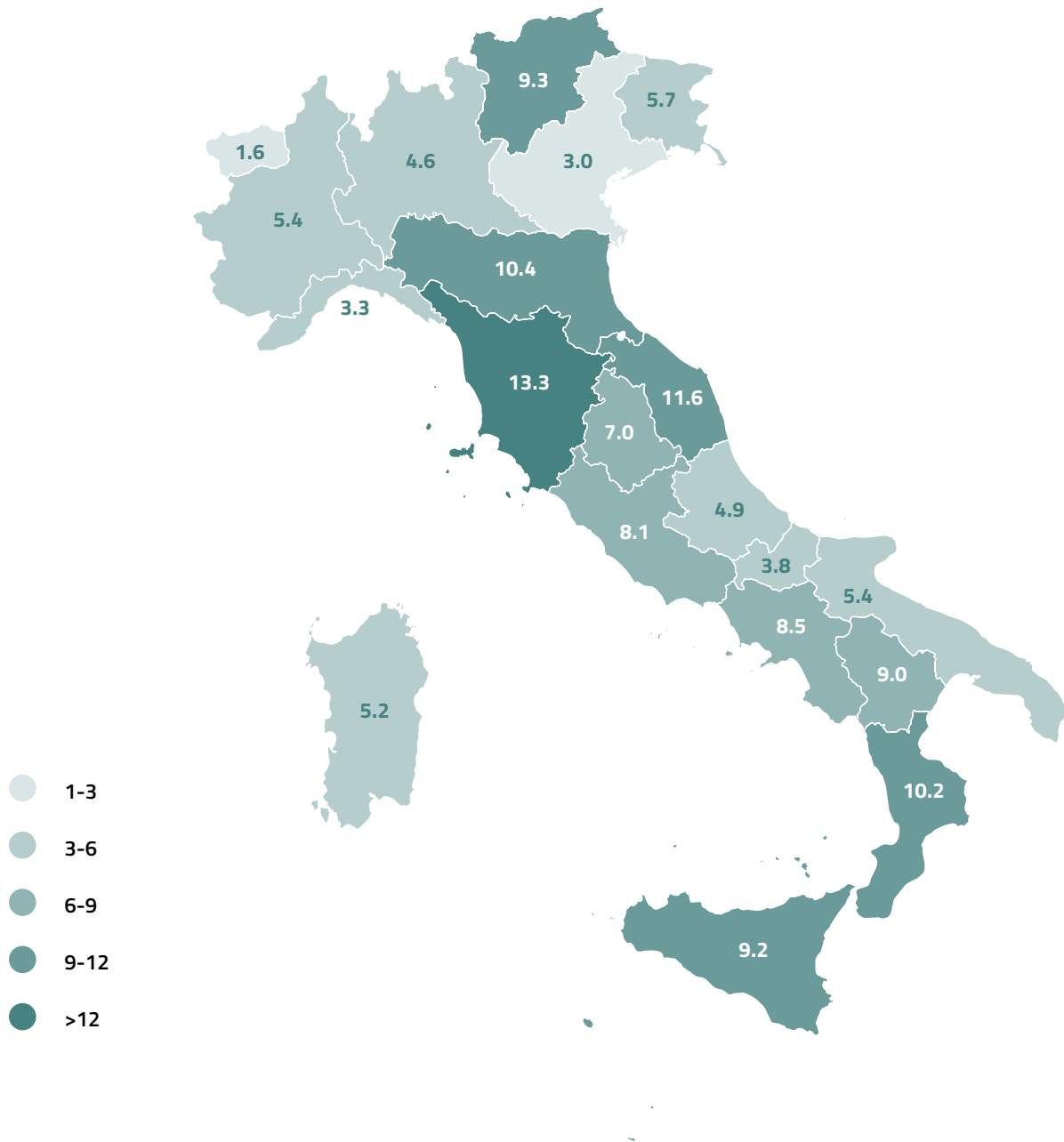
* Data provided by Regional Authorities

Source: Compilation by SINAB on Control Bodies, Regional Authorities and SIB data

In Italy, the share of organic farms in the total farms is 7.4%. Tuscany leads with the highest percentage (13.3%), with Marche, Emilia-Romagna, and Calabria also exceed-

ing 10%. In contrast, Abruzzo, Lombardy, Molise, Liguria, Veneto, and Valle d'Aosta have a share of organic farms below 5% (**Infographic 2.1**).

Infographic 2.1
Regional share of organic farms in total farms
 2023



Source: Compilation by SINAB on Control Bodies, Regional Authorities and SIB data and 7th General Agricultural Census data

ISMEA'S CONFIDENCE CLIMATE INDEX

The Confidence Climate Index is an instrument used to periodically assess the confidence and expectations of surveyed farms concerning the current economic situation and their mid-term outlook. The survey targets a sample of 800 respondents, including both conventional and organic farms, and invites them to answer two questions about current business trends and their future economic prospects. The index ranges from -100 to +100, with the highest score achieved when all respondents express a positive opinion about their farm situation and future prospects. Conversely, negative values reflect an unfavourable perception of business development.

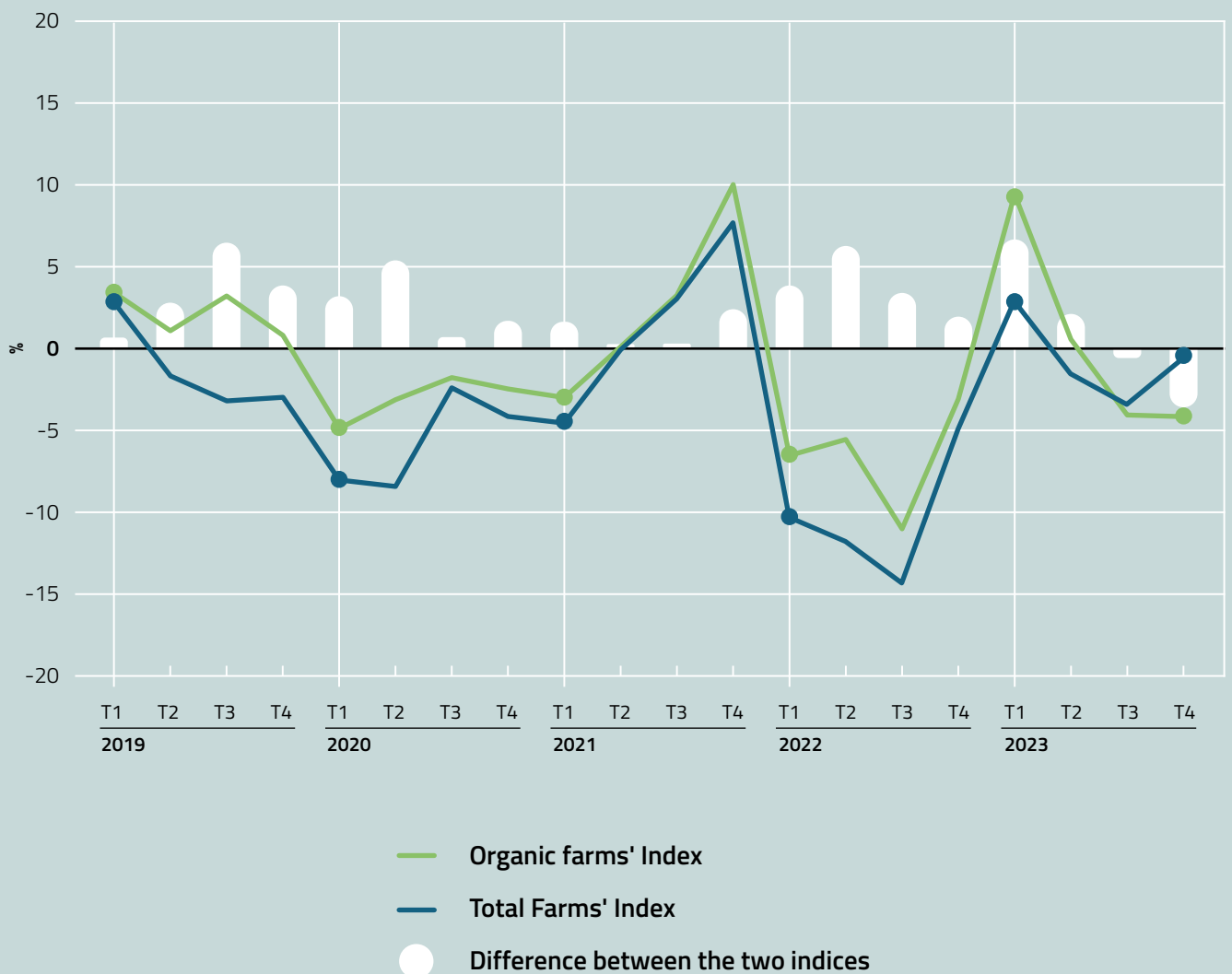
The Confidence Climate Index for 2023 reveals a reversal in trend compared to 2022. More specifically, the results show a different behaviour between conventional and organic farms (Chart 2.4).

At the beginning of the year, certified farms were more optimistic than conventional farms; however, the second half of 2023 reveals a significant decline in confidence among organic farms. The index, which registers

-4.3% in the fourth quarter of 2023, indicates that more farms hold a negative outlook regarding their current and future business situations.

In contrast, the sample of conventional farms exhibits less concern. While the latest value for 2023 remains negative (-0.6), it reflects an upward trend compared to previous quarters.

Chart 2.4*
Confidence Climate Index
2019-2023

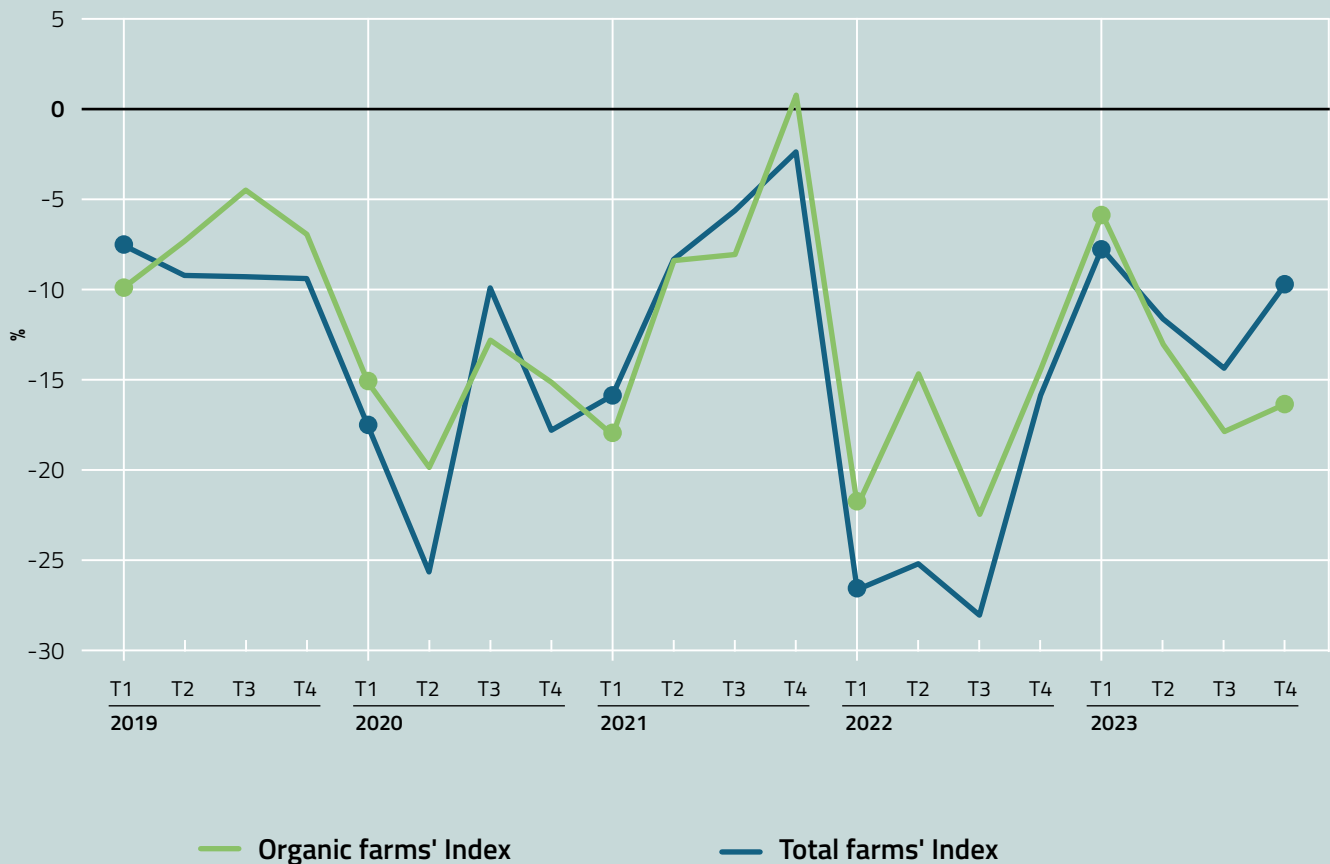


*The data reported in the charts reflect balanced percentages of responses (calculated as Share of positive responses – Share of negative responses).

Identifying the reasons for the contrasting sentiments between the two groups is not straightforward. Overall, the market for organic products has faced difficulties for some time, affecting both sales values and farmgate prices, which have increasingly aligned with those received by the farmers for conventional products. Furthermore, other contributing factors may include the instruments designed by the new agricultural policy to support farms. While it is true that support for environmental measures

has increased in the 2023-2027 programming period, the overall landscape remains highly heterogeneous. This variability raises concerns that many businesses in the primary sector may opt for alternative certification systems rather than pursuing organic certification. The basic components of the Confidence Climate Index, i.e. 'Current business performance' (Chart 2.5) and 'Future business performance expectations' (Chart 2.6), reflect the general trend.

Chart 2.5*
Current business performance
 2019-2023

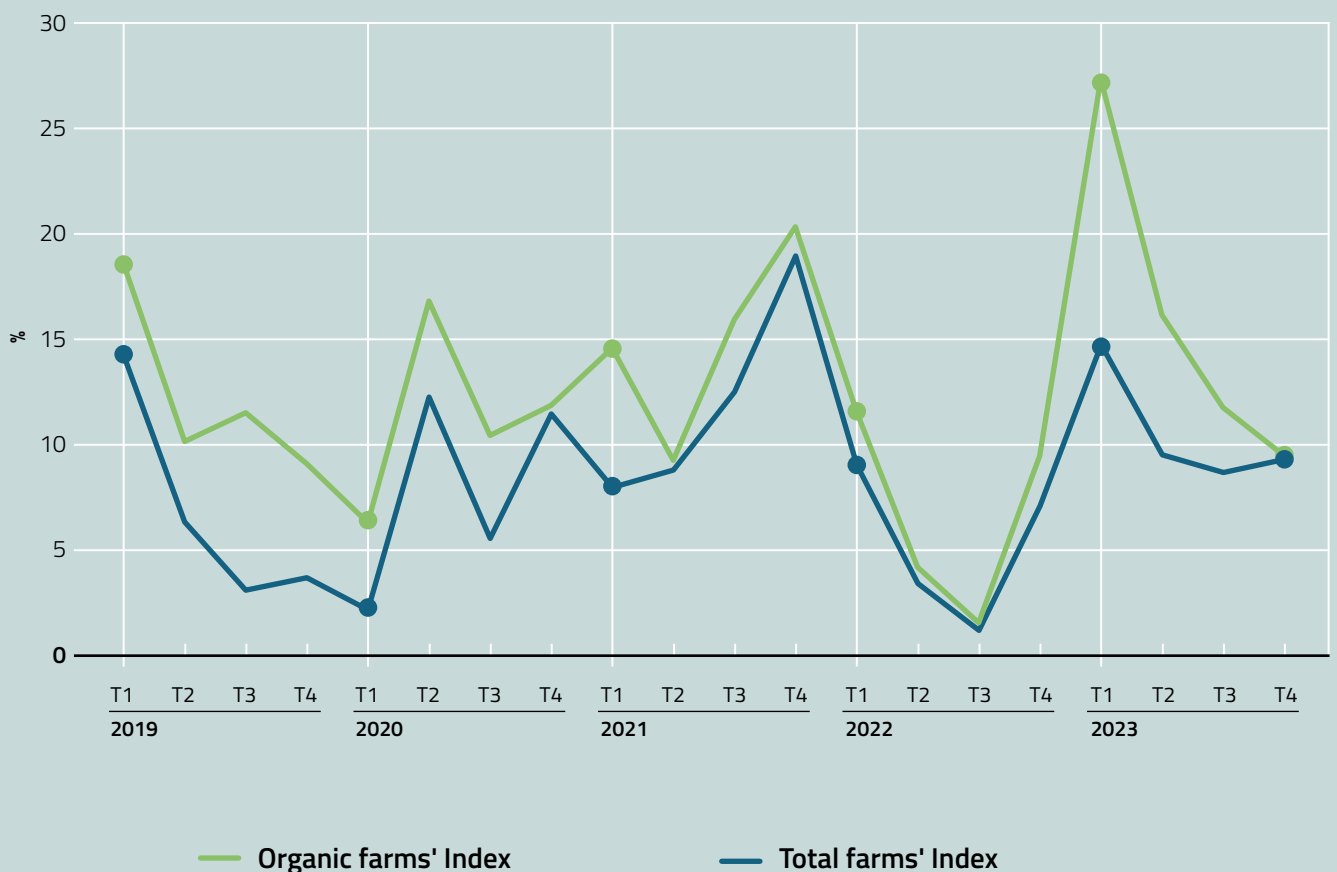


*The data reported in the charts reflect balanced percentages of responses (calculated as Share of positive responses – Share of negative responses).

The main difference is that, as in previous years, expectations for the future remain positive. This means that businesses primarily expect their performance to improve in the medium term. In contrast, organic farmers have historically maintained a more optimistic and proactive outlook toward the future of their businesses.

This attitude may also be associated with their lower average age. Younger farmers are often more willing to invest in high-tech equipment and take greater business risks, understanding that they have more time ahead to reap their benefits.

Chart 2.6*
Future business performance expectations
 2019-2023



*The data reported in the charts reflect balanced percentages of responses (calculated as Share of positive responses – Share of negative responses).

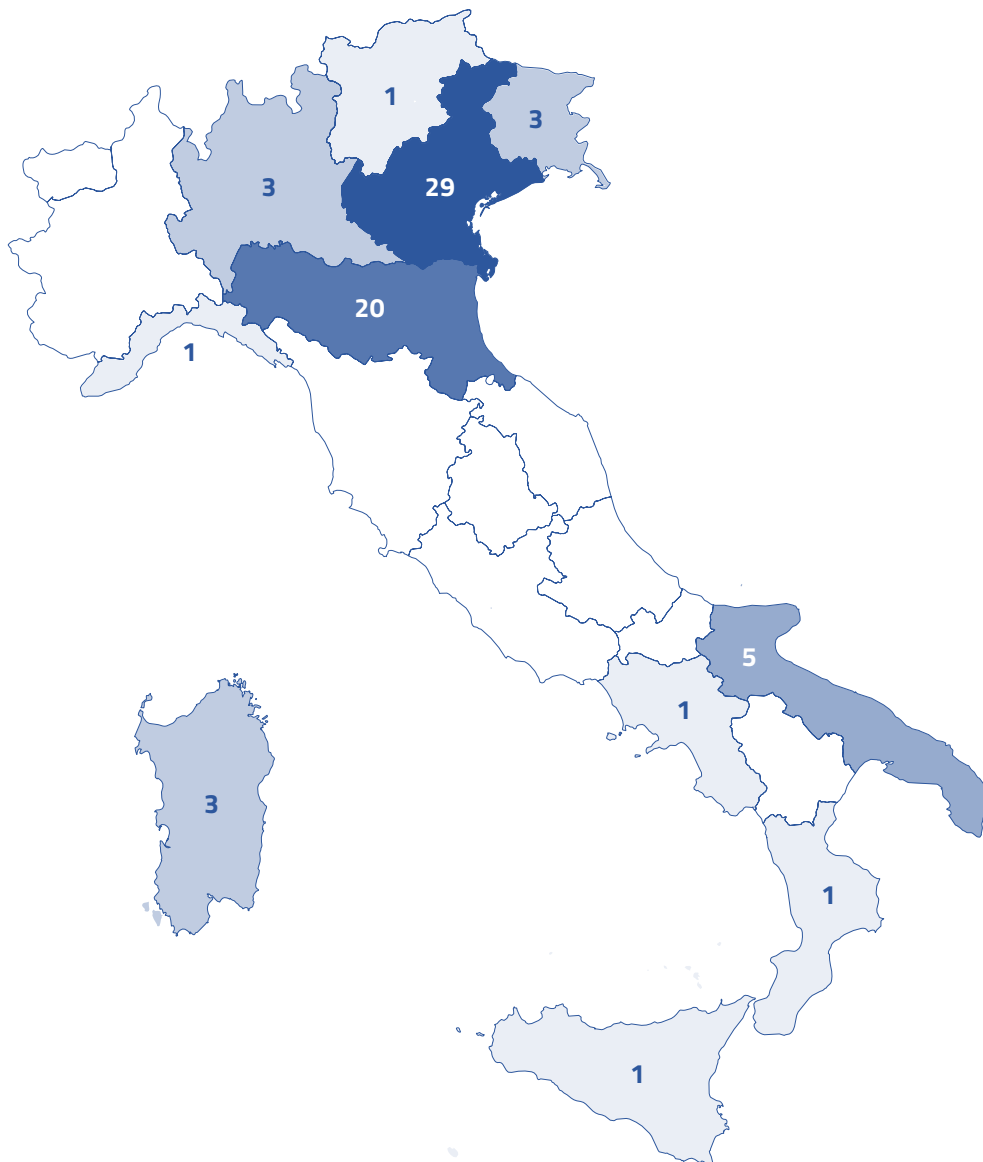
Organic aquaculture

In Italy, **organic aquaculture** continues to struggle to attract considerable interest from operators. the situation remains largely unchanged compared to 2022 regarding the number of organic farms and the char-

acteristics of fish farming practices. Veneto and Emilia-Romagna together represent 72% of all Italian facilities involved in mussel and mollusc production (**Infographic 2.2**).

Infographic 2.2

Regional distribution of organic aquaculture farms in Italy 2023





HOUSEHOLD CONSUMPTION AND PRICES

ORGANIC CONSUMPTION TRENDS IN THE RETAIL TRADE

In 2023, household consumption of organic products through the retail channel reached a value of 3.88 billion EUR at current prices, reflecting a 5.2% increase from the previous year. This marks the highest growth in recent years (**Chart 3.1**), though it remains below the 8.1% growth within the broader food industry.

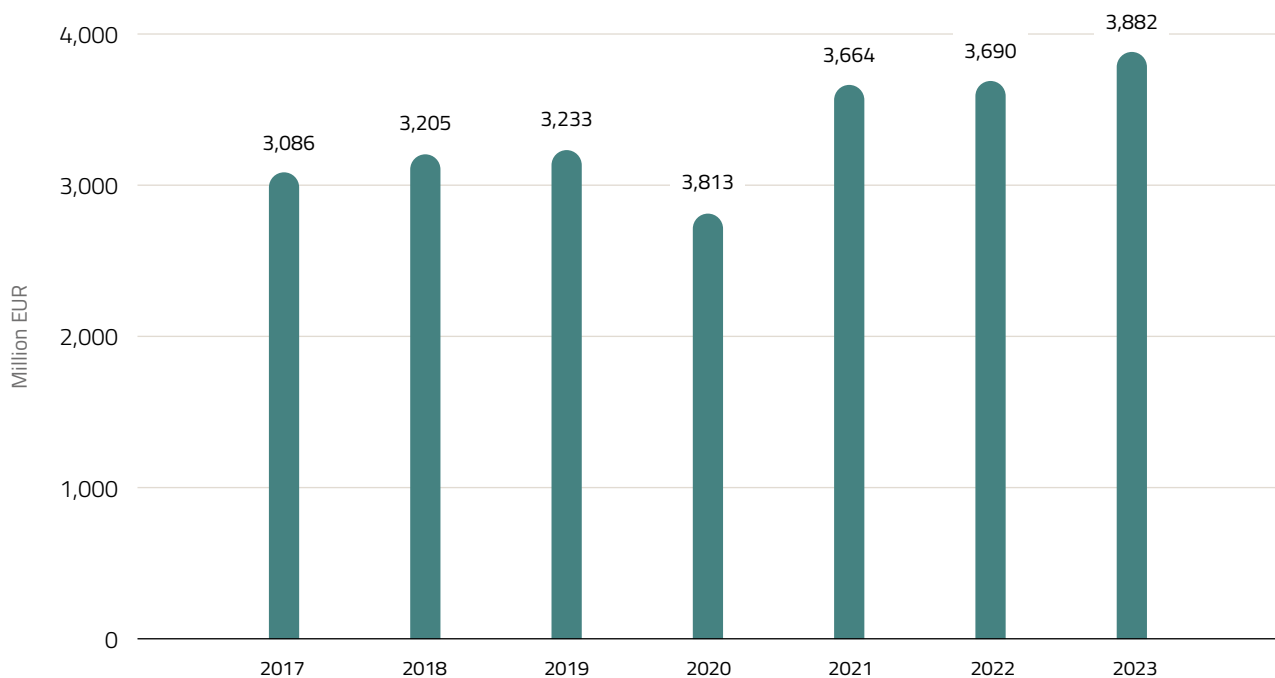
In terms of volume, organic product consumption remained stable, with a modest (+0.2% over 2022), contrasting with a 1.1% decline in the overall agri-food industry compared to 2022.

Therefore, the lower growth in the value of household expenditure on organic products, compared to the total

agri-food sector, may be due to lower price increases for organic products than for their conventional counterparts.

Although total food expenditure on organic products increased by more than 191 million EUR in 2023, the share of organic products in the overall value of Italian agri-food products declined to 3.5% for the second year in a row. This is partly due to the persistence of inflation, which, despite slowing down, continued to erode the purchasing power of Italian households during the year, penalising the increase in consumption of certified products.

Chart 3.1
Value of household consumption of organic products at current prices
 2017 to 2023



Source: ISMEA-NielsenIQ Observatory

Shopping basket composition

In 2023, the fruit and vegetables sector continued to hold a significant share of total organic product sales, accounting for 43.5%. However, this share decreased compared to the previous year, with the dairy sector benefiting from the shift, gaining one percentage point compared to 2022. The dairy sector's turnover exceeded 882 million EUR in 2023, driven primarily by increased sales, both in value and volume, of baby milk and industrial cheese (Chart 3.2).

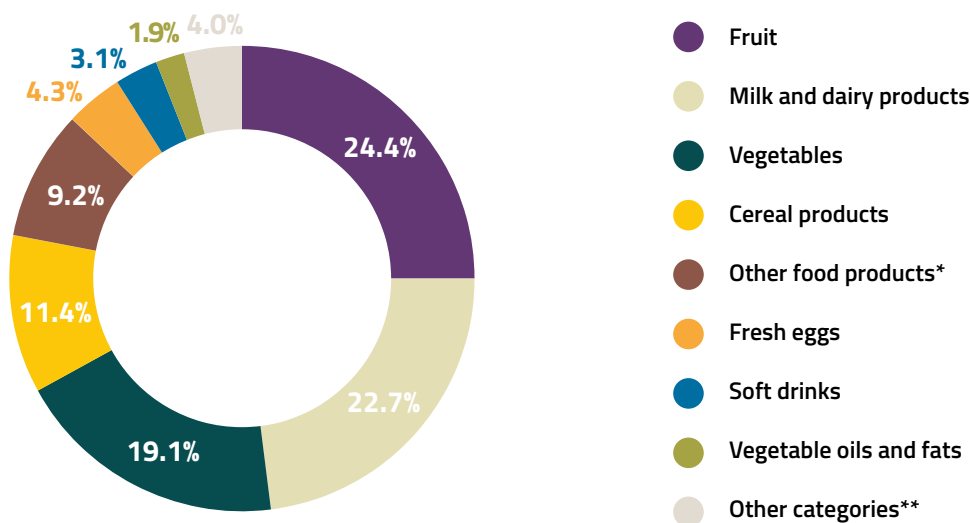
Notably, compared to the previous year, organic expenditure has generally increased across almost all product categories. Cereals and cereal products, vegetable oils and fats, fresh eggs, and non-alcoholic beverages saw standout growth, with sales rising by over 12 million EUR. In contrast, the meat and cured meat categories experienced declines (-9.5% and 11.4%, respectively),

driven by a combination of reduced consumption and lower selling prices (Chart 3.3).

The recovery in organic wine purchases is also noteworthy. After a year (2022) in which sales were down (-3.9%), sales rebounded by more than 3 million EUR, with a 6.9% increase in the value of expenditure.

When compared to the agrifood industry, the organic market shows smaller positive changes in all product categories except for vegetable oils and fats. This category shows an increase in organic expenditure of +20.4% compared to +7.5% for the overall market. This significant increase is mainly due to the sharp rise in organic oil prices (+21.8% in December 2023 compared to January 2023), triggered by the difficult olive production year in 2023, combined with limited product stocks (Chart 3.3).

Chart 3.2
Incidence of product categories on the organic basket
2023

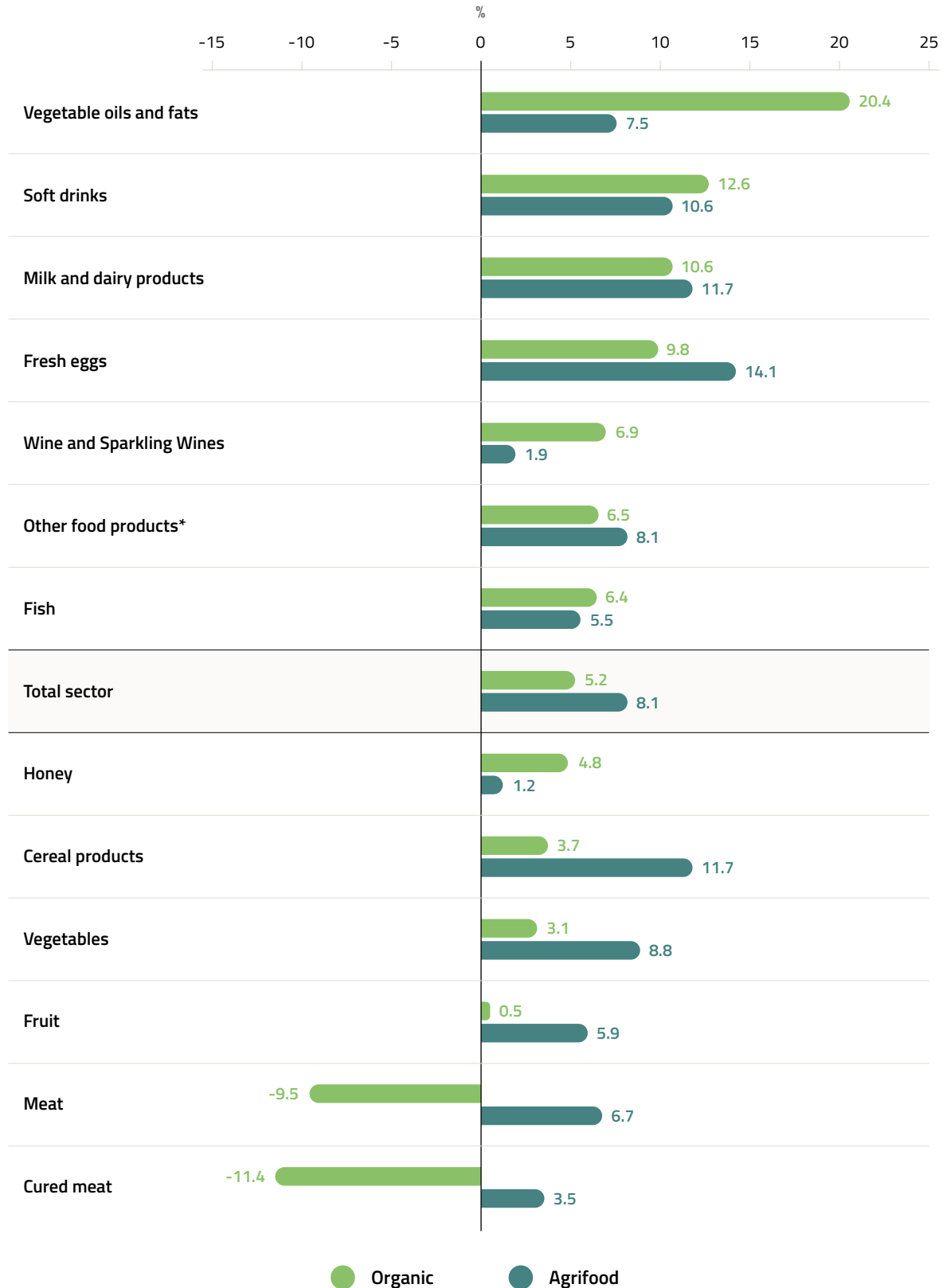


*Other food products include vinegar, coffee, tea, infusions, confectionery, chocolate products, salt, ice creams, sugar and sweeteners, savory snacks, sauces, desserts, and sweets

**Other categories include meat, fish, honey, cured meat, beer, wine and sparkling wines, alcoholic drinks

Chart 3.3

Percentage change of expenditure on organic products compared to total agrifood products 2023/2022



*Other food products include vinegar, coffee, tea, infusions, confectionery, chocolate products, salt, ice creams, sugar and sweeteners, savory snacks, sauces, desserts, and sweets

Source: ISMEA-NielsenIQ Observatory

Interestingly, the two-year period 2019-2020 marked a turning point in the growth of the value of organic consumption. Up until 2020, the value of organic spending had been growing at a much higher rate than the total agri-food sector.

However, the onset of high inflation in 2021, which peaked in 2022, reversed this trend. Since then, growth rates for total agri-food consumption have outpaced those of organic products in both 2022 and 2023 (**Chart 3.4**).

Chart 3.4

Percentage change in the Value of Organic Consumption and Comparison with Total Agri-Food Sector 2014-2023



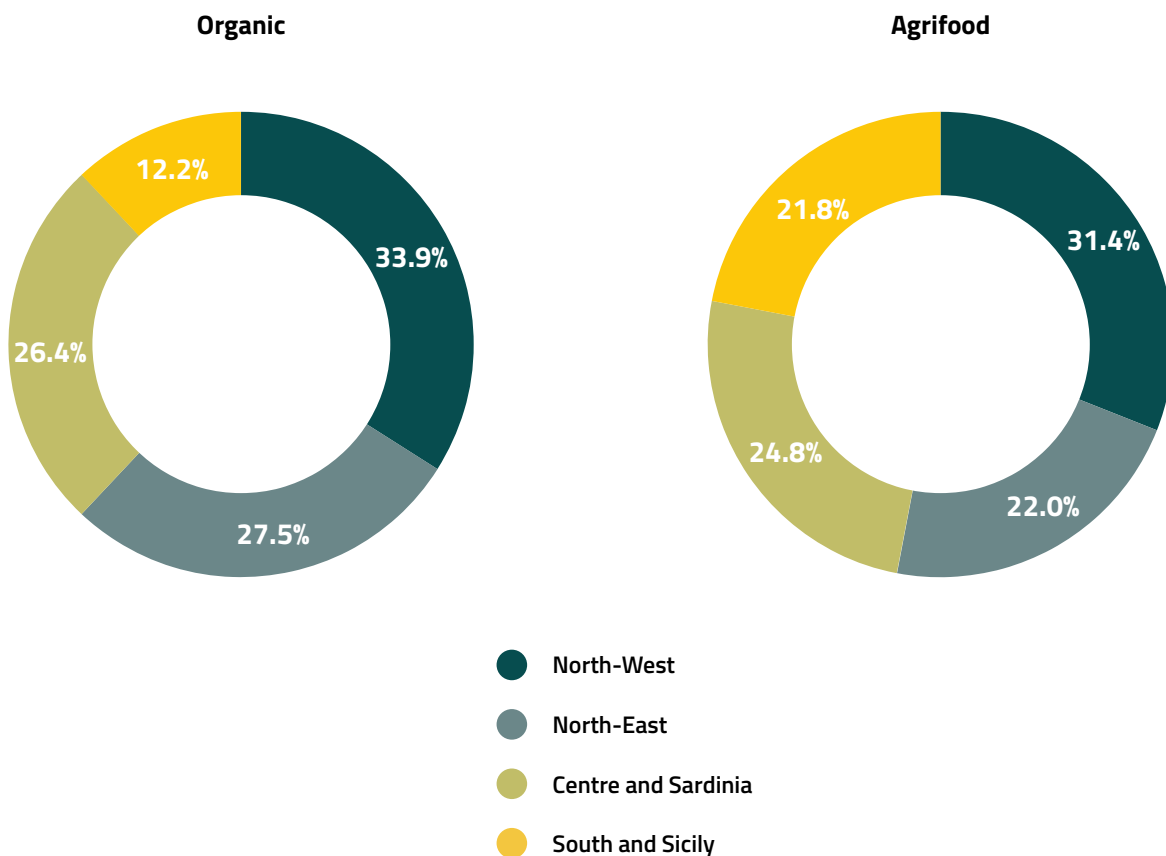
Source: compilation by Ismea on NielsenIQ-Market Track data

Geographical distribution of organic spending in the large retail trade

In 2023, organic sales were once again driven by the northern regions of Italy, accounting for over 60% of the total value, with a turnover exceeding 1.2 billion EUR⁴. However, compared to 2022, the North showed a slight decrease in its share of the Italian total (especially

in the North-West). Meanwhile, the 'South and Sicily' area saw its share rise to more than 12% in 2023. In the last year, the share of the 'Centre and Sardinia' also increased slightly, reaching 26.4%, while that of the North-East remained almost unchanged (27.5%) (Chart 3.5).

Chart 3.5
Incidence of organic product sales in large retail and comparison with the total agri-food sector by geographic area
 2023



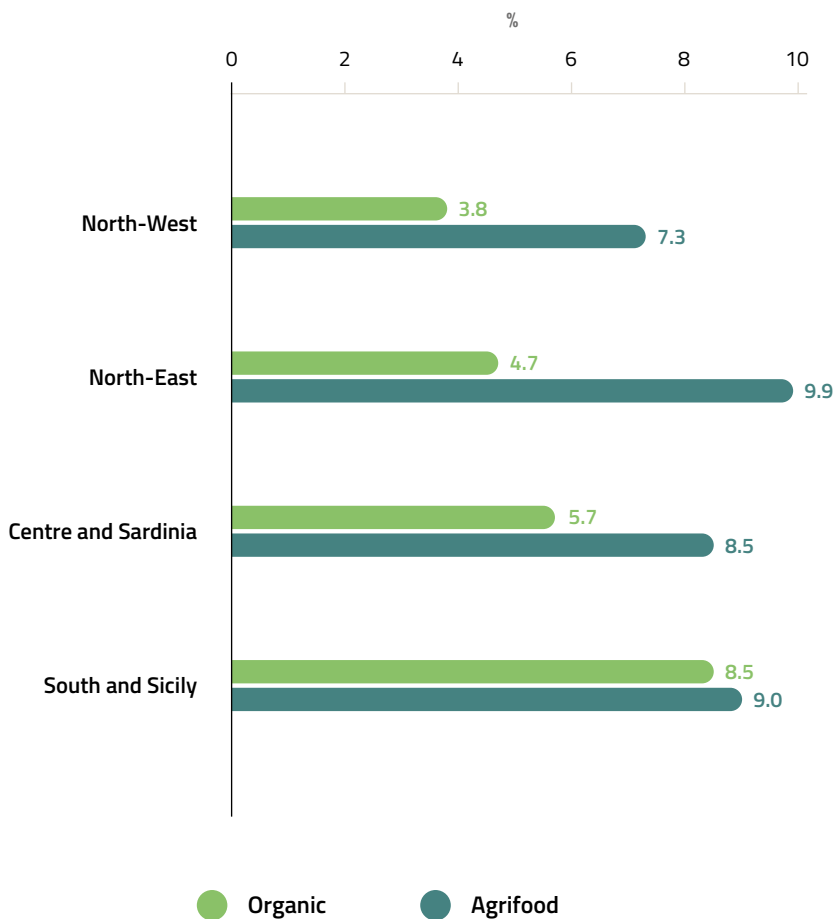
Source: compilation by Ismea on NielsenIQ-Market Track data

⁴ Consumption values by region are from the NielsenIQ-Market Track database, which only monitors fixed-weight products.

In general, an increase in the value of expenditure on organic products common to all macro-regions is reported; however, the increase in the 'South and Sicily' area stands

out (+8.5% compared to 2023), the only area where purchases of organic products keep pace with the agri-food sector as a whole (**Chart 3.6**).

Chart 3.6
Percentage change in organic spending and comparison with the total agri-food sector, by geographic area 2023/2022



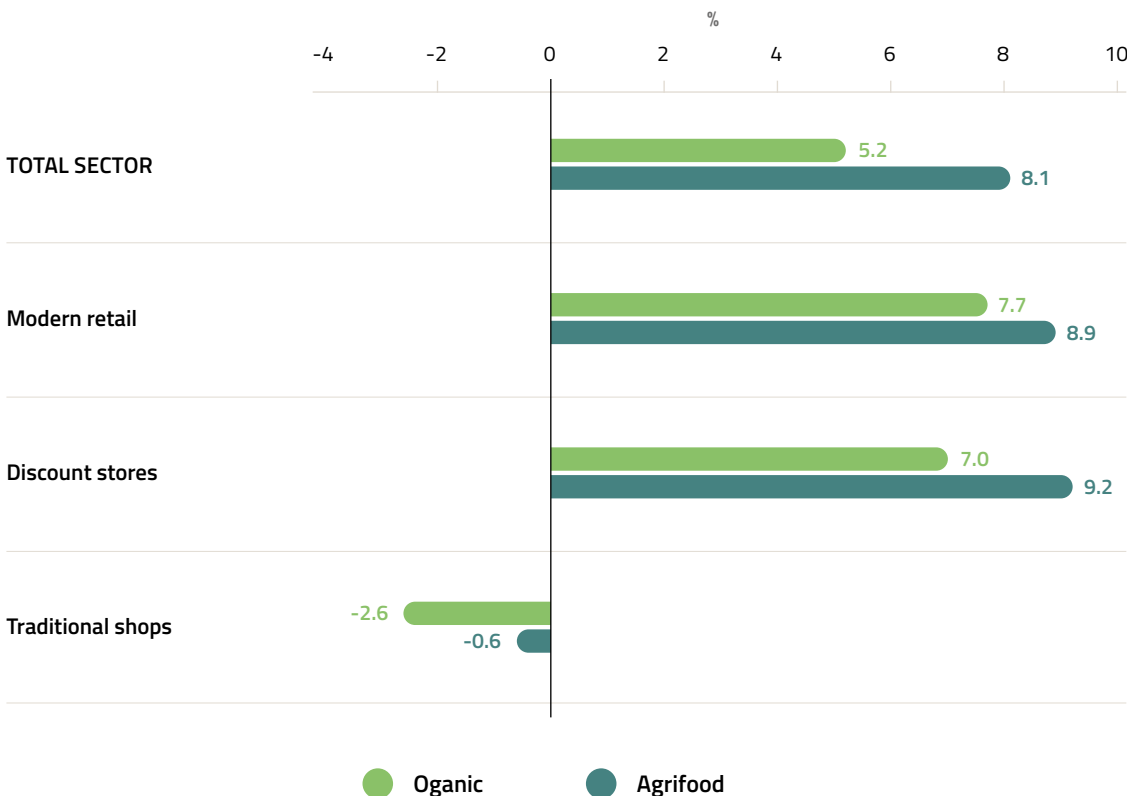
Source: compilation by Ismea on NielsenIQ-Market Track data

SALES CHANNELS

Among the retail channels, large retail confirmed its leadership in the sale of organic products with a 65% market share and a value of 2.5 billion EUR, with a turnover increase of more than 178 million EUR (+7.7% over 2022), mainly supported by the value of sales of vegetable oils and fats and dairy products, which increased by 18.6% and 11.8% respectively over the previous year. In 2023, the value of organic product consumption in discount stores continued to rise (+7.0% compared to 2022), surpassing 548 million EUR. Notably, purchases of organic meat and cured meats in this channel saw significant growth (+108.4% and +51.3%, respectively), in contrast to the overall decline in organic meat and cured meat purchases across all channels (refer to **Chart 3.3**). This sug-

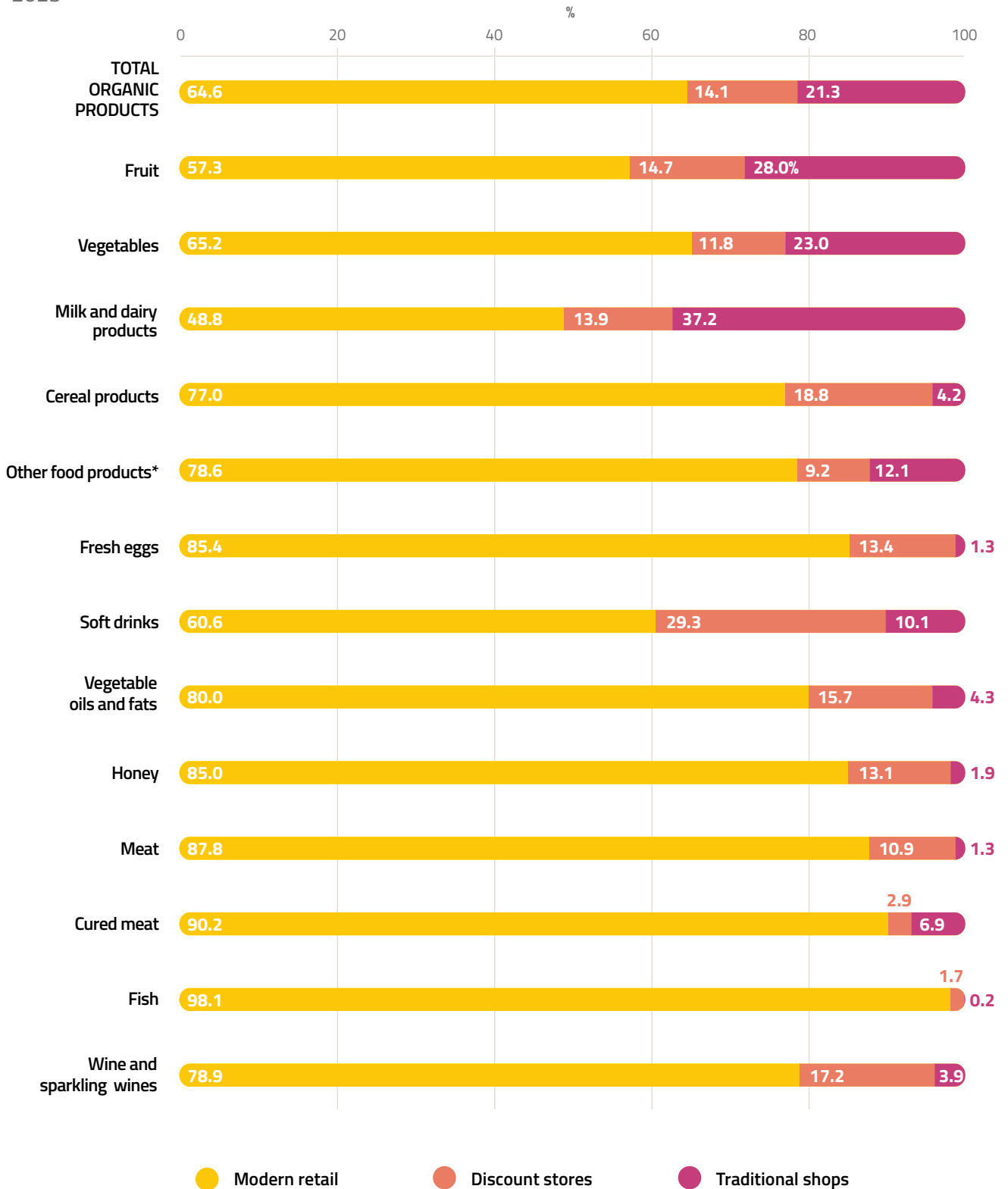
gests a heightened focus on the price of these items. In general, the success of discount stores in recent years appears to be driven by the persistence of inflation, which has led Italian households to pay more attention to the shelf price of many food products. Finally, a specific analysis concerns traditional shops. In 2023, the share of sales accounted for by this type of distribution falls by almost two percentage points, representing a loss of 22 million EUR in organic turnover compared to 2022. For the first time, this retail channel experienced a drop in the value of organic fruit (-12.7%) and vegetables (-2.9%) consumption, which together make up over 65% of the total organic spending value (**Charts 3.7 and 3.8**).

Chart 3.7
Percentage change in organic spending and comparison with the total agri-food sector by sales channel 2023/2022



Source: Ismea-NielsenIQ

Chart 3.8
Breakdown of organic products by sales channel
 2023



*Other food products include vinegar, coffee, tea, infusions, confectionery, chocolate products, salt, ice creams, sugar and sweeteners, savory snacks, sauces, desserts, and sweets

Source: Ismea-NielsenIQ

FARM-GATE PRICES FOR ORGANIC PRODUCTS

The year 2023 was marked by significant volatility in farm-gate prices⁵ for many agricultural commodities. In particular, prices for both conventional and organic agricultural commodities generally declined after peaking in 2022. This earlier surge was driven by increased cereal and oilseed imports by China and the outbreak of the Russia-Ukraine conflict, which put considerable pressure on international markets.

On the other hand, organic paddy rice (Arborio variety) has seen a price increase of 31.4% compared to the previous year. This increase is due to the reduced availability of the product, which falls short of industry demand, coupled with a growing season marked by heat waves that hindered optimal crop development.

Farm-gate prices for fruit and vegetables and fresh eggs have remained stable, while prices for fresh milk

(+15.9%) and EVO oil (+14.7%) have risen.

A comparison between organic and conventional agricultural commodities reveals similar price trends in most cases; however, some conventional products experienced steeper declines. For instance, the price drop for conventional sunflower (-36.2%) was significantly larger than that for organic sunflower (-22.7%). In contrast, for categories such as fruit and vegetables, eggs, and extra virgin olive oil (EVO), conventional prices showed a sharper increase compared to organic ones, with EVO oil rising by +59.5% for conventional versus +14.7% for organic.

Overall, on an annual basis, the price gap at the farm-gate level between organic and conventional products has widened for most cereals and milk, while narrowing for soybean, fruit, vegetables, and EVO oil.

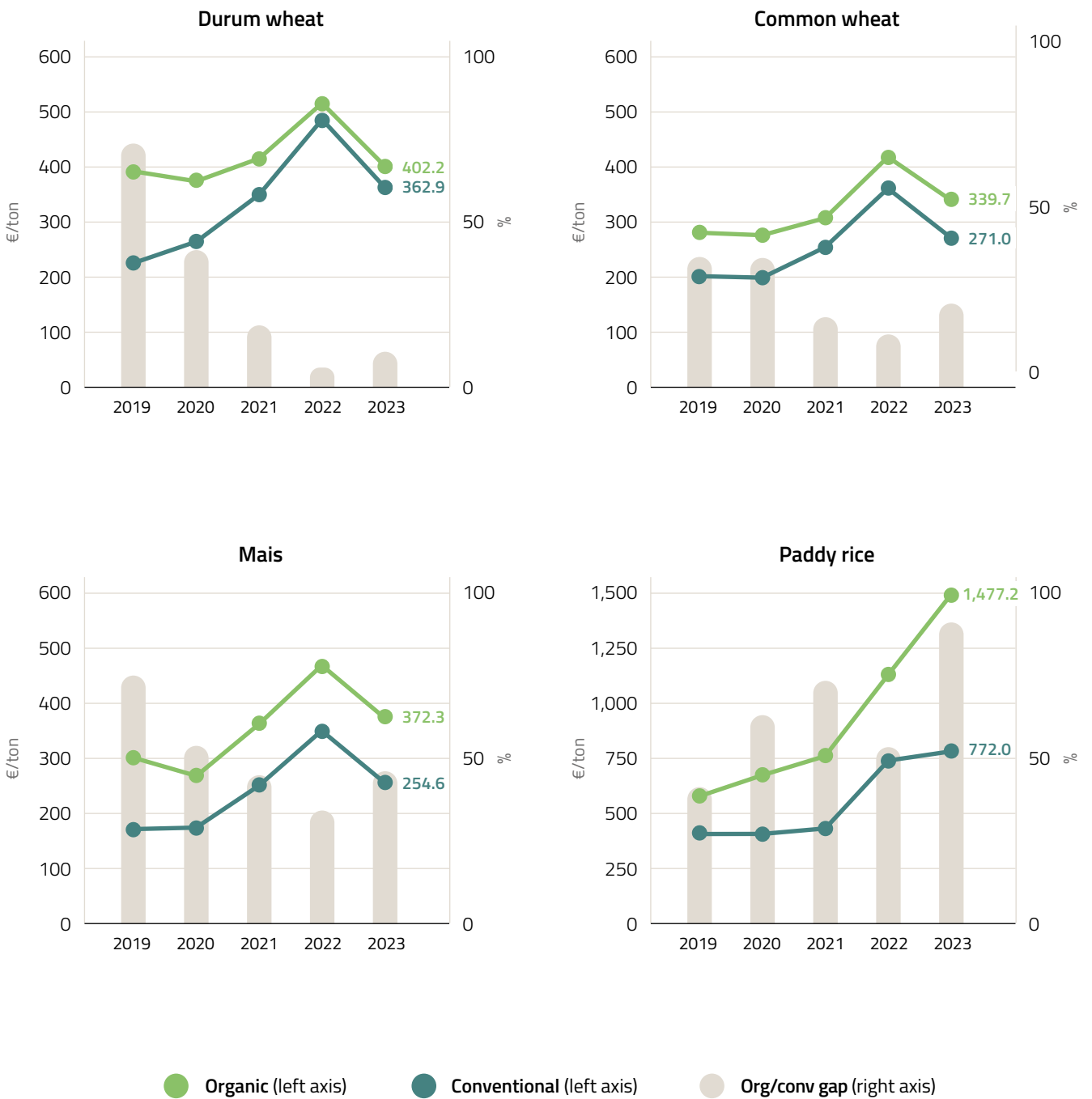


5. Prices set at the initial stage of trading organic products by the producer, or as close as possible to the point of production. Ismea monitors farm gate prices for organic products through a network of data collection spanning various commercial channels. Detailed farm gate prices for organic products can be accessed in the biostatistics section of the website <http://www.sinab.it/>

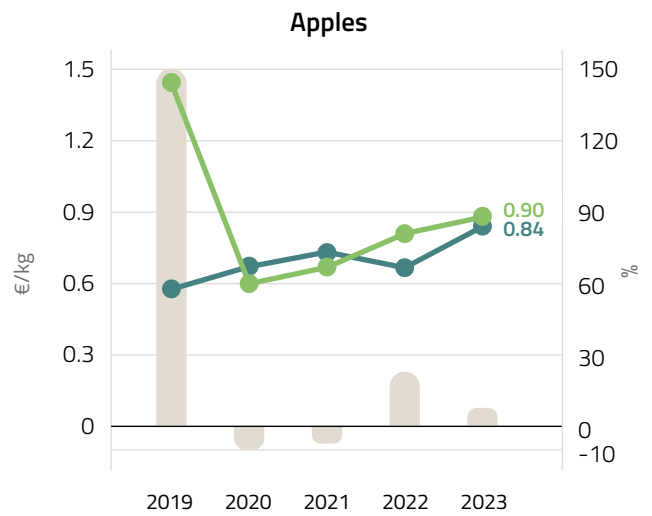
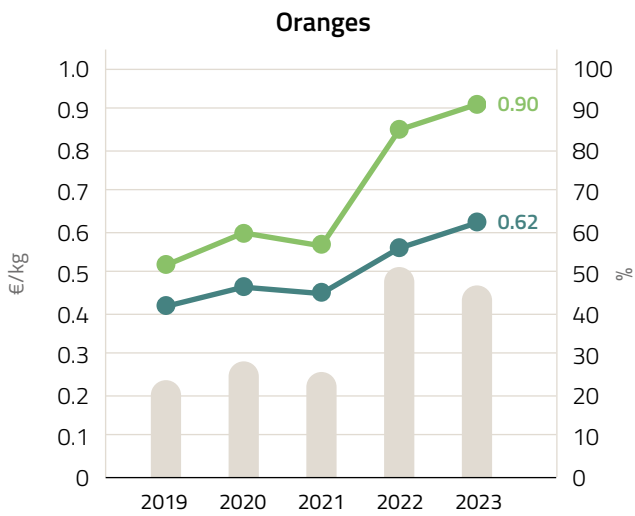
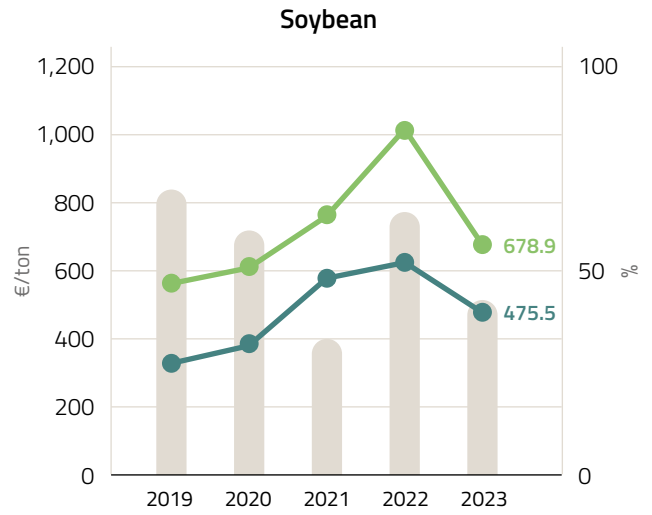
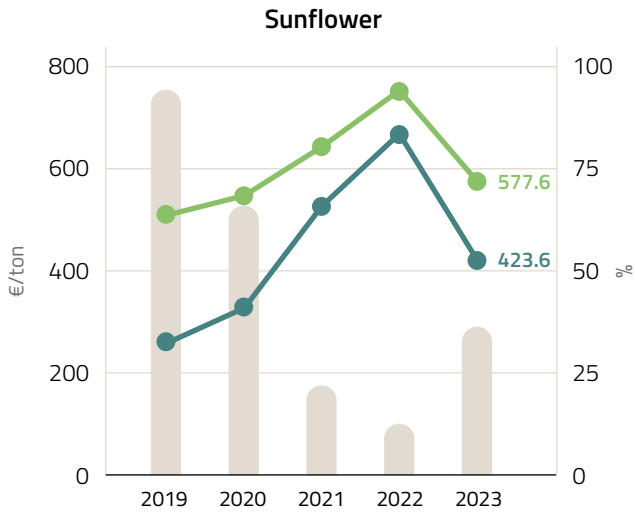
Charts 3.9

Farm-gate prices of some organic products and their conventional counterparts

From 2019 to 2023

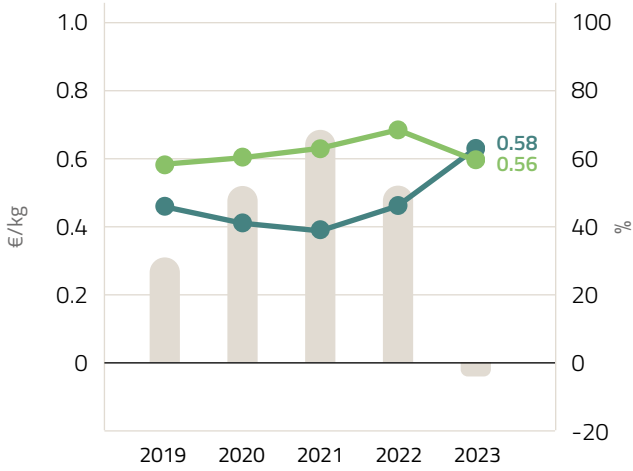


Source: Ismea Price Survey Network

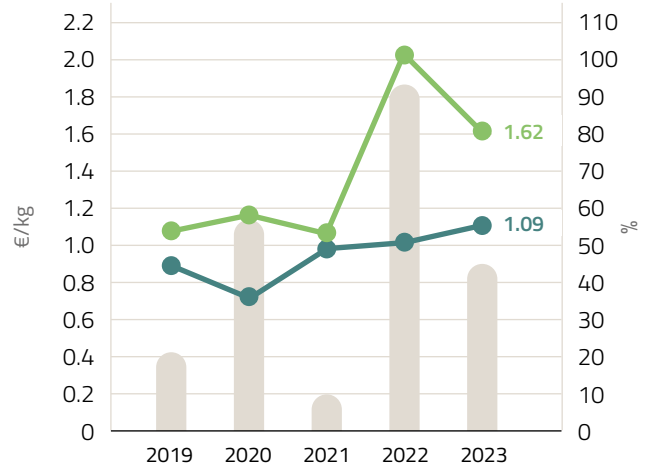


● Organic (left axis) ● Conventional (left axis) ● Org/conv gap (right axis)

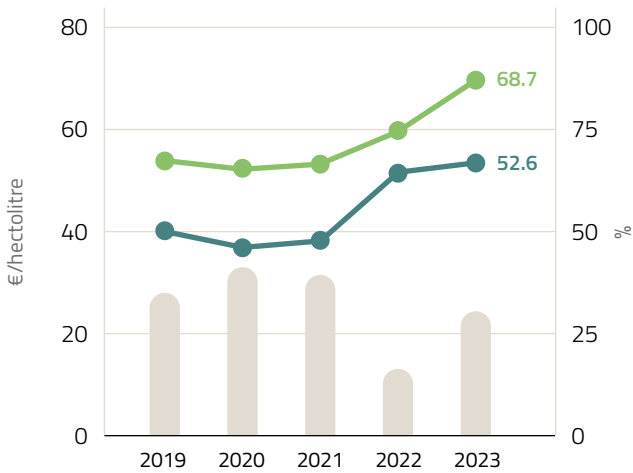
Common potatoes



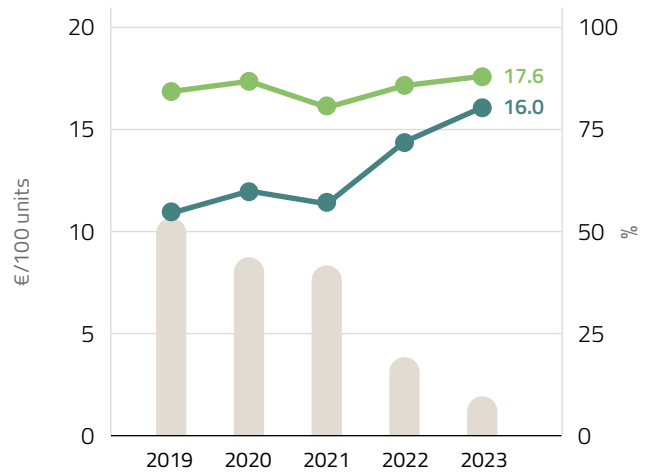
Tomatoes



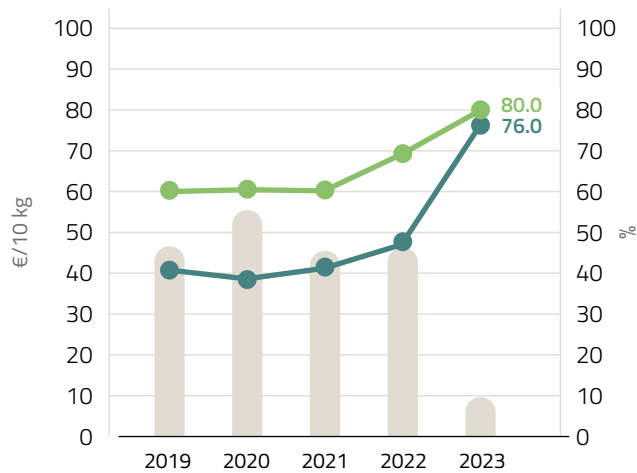
Cow milk



Eggs



EVO oil



● Organic (left axis)
 ● Conventional (left axis)
 ■ Org/conv gap (right axis)

CONSUMER PRICES OF ORGANIC PRODUCE

Consumer prices are collected in large retail stores. The price is the average shelf price paid by Italian households and monitored for 2023 for a basket of products selected for their relevance or direct link to those analysed at the farm-gate price level. Price increases are also reported for 2023, but they are less marked than those observed at the farm gate. The most significant price increases are recorded for processed products and animal derivatives (e.g. oil, milk) as a result of both limited raw material supplies and general increases in production and processing costs. Interestingly, the consumer price gap between organic and conventional products remains fairly stable for the

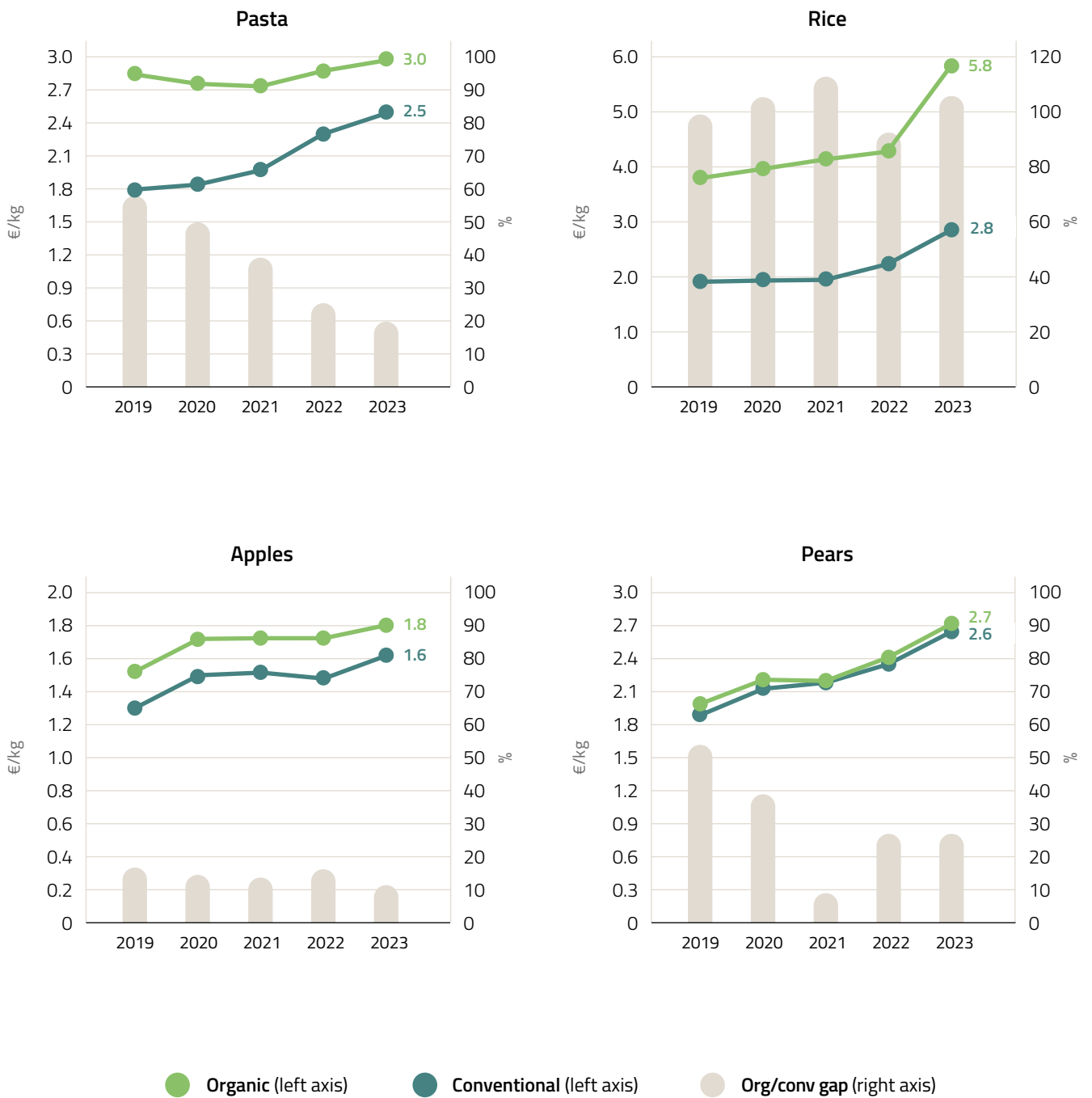
reference period. Specifically, over the past year, the price gap narrowed for fruit and vegetables (e.g. apples, pears, potatoes) and pasta, but widened for most processed products, such as rice, EVO oil, and milk. It is also unusual that for some products (e.g. tomatoes and kiwis) the organic price is lower than the conventional one. An explanation for this phenomenon can be found in the definition of the average price, which in this case includes some products and brands that have a strong position on the conventional market and command high prices regardless of certification.



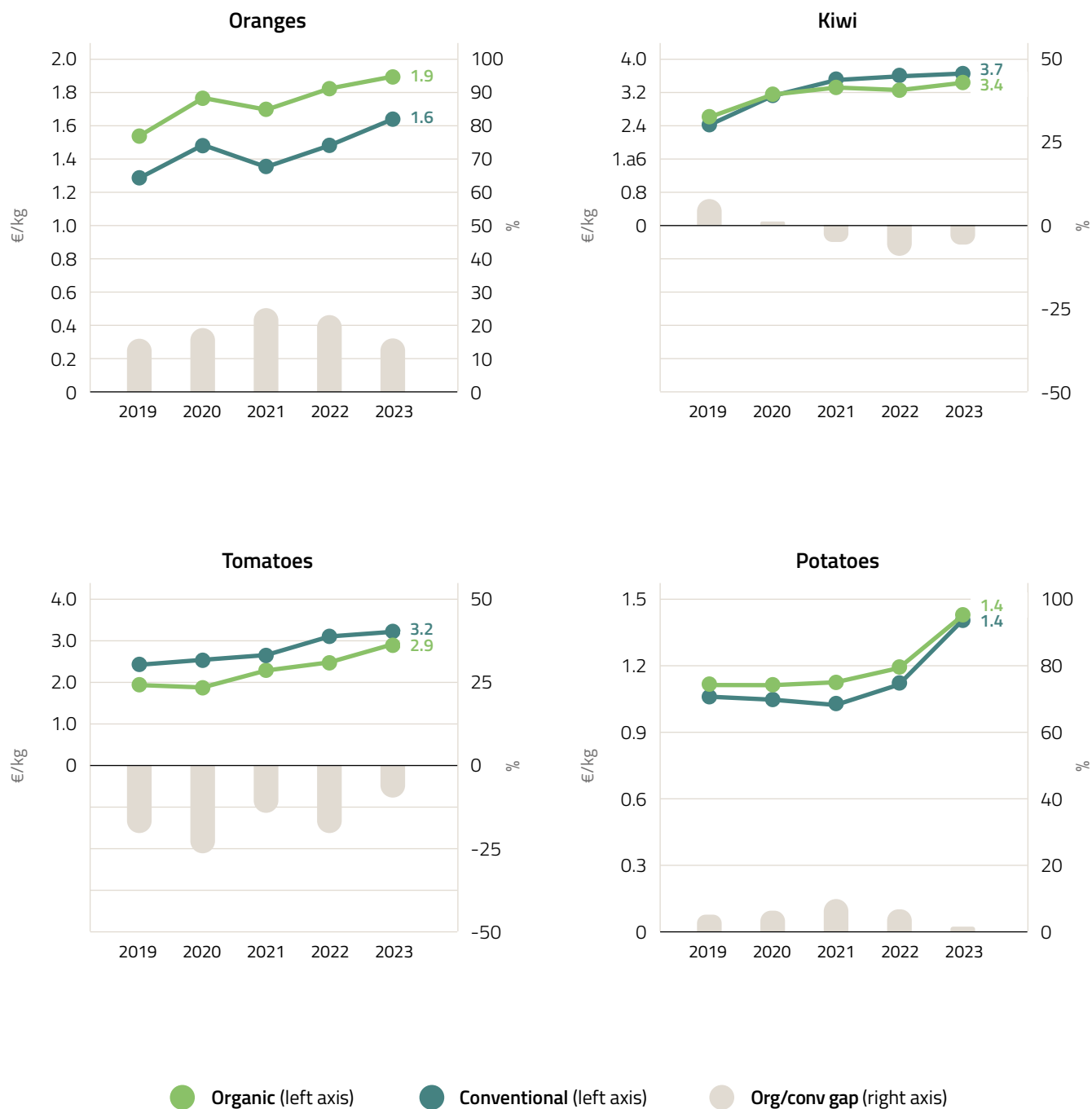
Charts 3.10

Shelf price of some organic products and their conventional counterparts

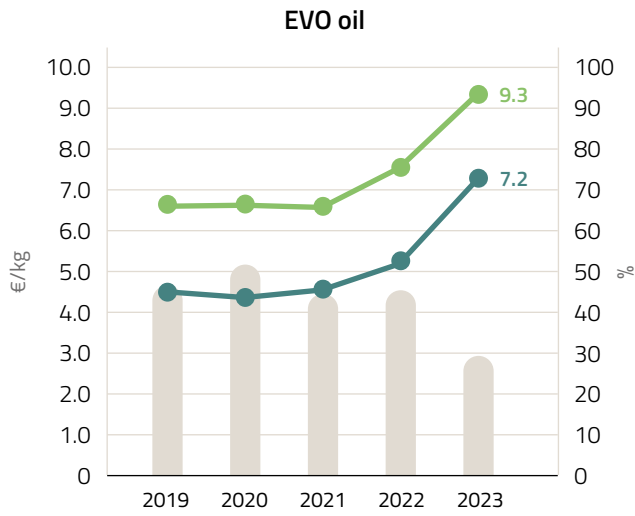
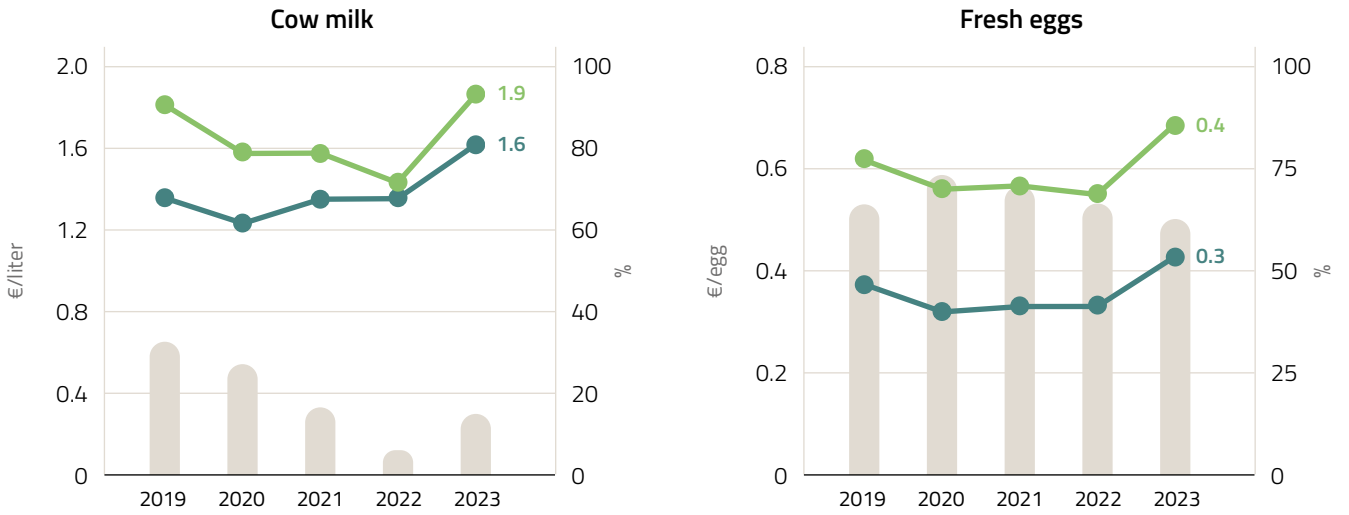
From 2019 to 2023



Source: compilation by Ismea on NielsenIQ-Consumer Panel data



Source: compilation by Ismea on NielsenIQ-Consumer Panel data



● Organic (left axis)
 ● Conventional (left axis)
 ● Org/conv gap (right axis)



IMPORTS FROM THIRD COUNTRIES

INTRODUCTION

Import of organic products from third countries is regulated by Regulation (EU) 2018/848 (Articles 45 to 49) and its secondary acts. The regulation, in force as of 1 January 2022, stipulates that import of organic products from third countries can take place in three different ways:

- a. Imports from third countries of organic products that comply with Chapters II, III and IV of Reg. (EU) 2018/848.
- b. Imports of organic products from third countries recognised as equivalent by the European Union under a specific trade agreement (Art. 47 of Reg. (EU) 2018/848).
- c. Imports of organic products from third countries whose equivalence of the production rules and control system to the provisions of the European Union is established by the EU Commission (Art. 48 of Reg. (EU) 2018/848).

The data⁶ presented in this chapter considers both imports under the compliance system referred to in point a) and imports under the equivalence system described in points b) and c).

However, until 31 December 2024 certification under equivalence arrangements, pursuant to the previous Reg. (EC) 834/2007, for control bodies authorised by the European Commission to certify in third countries, will still be in force. Concerning point b) there are currently only a few countries recognised with a specific trade agreement (Chile, Switzerland, and Great Britain). For the rest, the equivalence recognition of third countries according to Reg. (EC) 834/2007 will continue to be valid until 31 December 2026.

Figures presented here do not consider intra-Community

trade, and therefore do not fully account for all volumes of organic products entering Italy from third countries via other EU countries. The tables and charts which follow have been prepared by SINAB based on the data collected from TRACES (Trade Control 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. Starting from 1 January 2022, declarations of consignments of organic products imported from third countries to the EU are handled exclusively via the TRACES⁷ platform. 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). Regarding the collection of data on imports, the TRACES platform allowed the acquisition of all imports of organic products to Italy, including those made by EU operators not notified in Italy⁸.

As of 31 December 2023, there were 573 companies on the national list of importers of organic products from third countries, of which 366 had an import activity during 2023. Data relating to the product volumes were classified according to the TARIC⁹ (Integrated Tariff of the European Communities), customs tariffs, as reported by the operators in their notification on TRACES. TARIC is based on the Combined Nomenclature (CN), whose sub-headings (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.

6. All data presented here were compiled as part of DIMECIBIO IV 2022-2025, a project funded by the Italian Ministry of Agriculture, Food Sovereignty and Forests (MASAF), managed by ISMEA and implemented by CIHEAM Bari's Operational Unit in collaboration with UNIVPM, based on TRACES records.

7. Reg. (EU) 2021/2306 and Ministerial Decree No. 52932 of 4 February 2022.

8. In 2023, il 91,7% of the volume of organic products coming to Italy is imported by Italian importers notified on the national SIB system, while the remaining 8.3% enters Italy through importers from other EU Member States.

9. See Article 3 of Regulation (EEC) No 2658/87.

ORGANIC PRODUCTS IMPORTED FROM THIRD COUNTRIES

Analysis of the data as of 31 December 2023

Analysis of the data as of 31 December 2023 on imports of organic products from third countries shows an increase in the total volume, expressed in tonnes, of 37.8% compared with 2022 and 174% compared with 2014 (Table 4.1).

Compared with 2022, the increase in volumes concerns all product categories. However, fresh vegetables and pulses, and cereals show the most significant growth, with import volumes rising by 73.5% and 67.8%, respectively. Also noteworthy are the positive changes for industrial crops (+36.8%) and the fresh and dried fruit category (+35.8%) (Table 4.1).

There are some changes in the percentage share of the different product categories in the total volumes imported into Italy from third countries compared to 2014. In particular, the cereals category (43% in 2014 compared to 28% in 2023) and the processed products

category (16% in 2014 compared to 5% in 2023) have decreased significantly in about a decade. Fresh fruit, vegetables and pulses and industrial crops are fairly stable over time. In contrast, vegetable oils rise from only 0.1% to 10% in 2023. The same trend is observed for the category that includes coffee, cocoa, sugars, tea and spices, with incidence increasing from 0.4% in 2014 to 12% in 2023.

Regarding the percentage share of the different areas of origin of organic products imported into Italy from third countries, compared to 2014, the share of products imported from Africa grows significantly (from 9% in 2014 to 25% in 2023), due to the high increase in soya beans coming from this continent, while imports from non-EU Europe (36% in 2014 vs. 27% in 2023) and Asia (24% in 2014 vs. 19% in 2023) decrease slightly.

Table 4.1

Volumes of organic products imported to Italy from third countries (tonnes), by product category and geographical area

2014, 2022 and 2023

Product category	Geographical area	Volumes 2014	Volumes 2022	Volumes 2023	2023/2022 % change
Total products	Total	91,932	183,096	252,257	37.8
	Africa	8,360	57,542	64,224	11.6
	Central America	6,207	7,433	9,113	22.6
	North America	6,488	3,145	4,875	55.0
	South America	16,055	46,337	56,084	21.0
	Asia	21,917	40,912	48,661	18.9
	Non EU-Europe	32,904	27,705	69,270	150.0
	Oceania	1	22	31	39.1
Cereals	Total	39,492	42,188	70,789	67.8
	Africa	-	10	-	-100.0
	Central America	-	-	-	-
	North America	3,974	1,304	2,383	82.7
	South America	2,003	1,789	694	-61.2
	Asia	8,614	31,532	29,172	-7.5
	Non EU-Europe	24,901	7,552	38,539	410.3
	Oceania	-	-	-	-
Fresh and dried fruit	Total	20,748	39,656	53,858	35.8
	Africa	1,097	2,420	1,605	-33.7
	Central America	5,970	1,549	2,962	91.2
	North America	645	164	65	-60.7
	South America	9,824	27,936	41,015	46.8
	Asia	284	612	672	9.8
	Non EU-Europe	2,929	6,975	7,540	8.1
	Oceania	-	-	-	-

Product category	Geographical area	Volumes 2014	Volumes 2022	Volumes 2023	2023/2022 % change
Fresh vegetables and pulses	Total	8,845	14,388	24,963	73.5
	Africa	2,638	6,043	5,445	-9.9
	Central America	-	-	-	-
	North America	854	200	597	198.6
	South America	466	354	310	-12.6
	Asia	3,794	3,326	7,212	116.9
	Non EU-Europe	1,094	4,465	11,399	155.3
Oceania	-	-	-	-	
Industrial crops *	Total	8,112	26,322	36,017	36.8
	Africa	42	21,594	26,635	23.3
	Central America	-	-	-	-
	North America	61	51	153	199.0
	South America	15	316	341	8.0
	Asia	7,082	753	4,067	440.4
	Non EU-Europe	913	3,608	4,821	33.6
Oceania	-	-	-	-	
Vegetable oils and fats	Total	48	21,784	25,008	14.8
	Africa	12	21,419	24,408	14.0
	Central America	24	-	-	-
	North America	-	30	-	-100.0
	South America	4	19	1	-95.8
	Asia	6	238	524	120.3
	Non EU-Europe	2	76	75	-2.3
Oceania	0	-	-	-	
Coffee, Cocoa, Sugars, Tea, and Spices	Total	332	29,478	29,616	0.5
	Africa	13	5,762	5,728	-0.6
	Central America	-	5,884	6,144	4.4
	North America	-	778	1,012	30.2
	South America	-	14,826	12,241	-17.4
	Asia	312	2,180	4,448	104.1
	Non EU-Europe	8	28	43	50.6
Oceania	-	19	0	-98.7	
Processed products	Total	14,353	9,281	12,007	29.4
	Africa	4,560	292	403	38.0
	Central America	213	-	7	100.0
	North America	954	618	665	7.6
	South America	3,744	1,097	1,483	35.3
	Asia	1,824	2,271	2,565	12.9
	Non EU-Europe	3,058	5,001	6,854	37.1
Oceania	0	3	30	964.7	

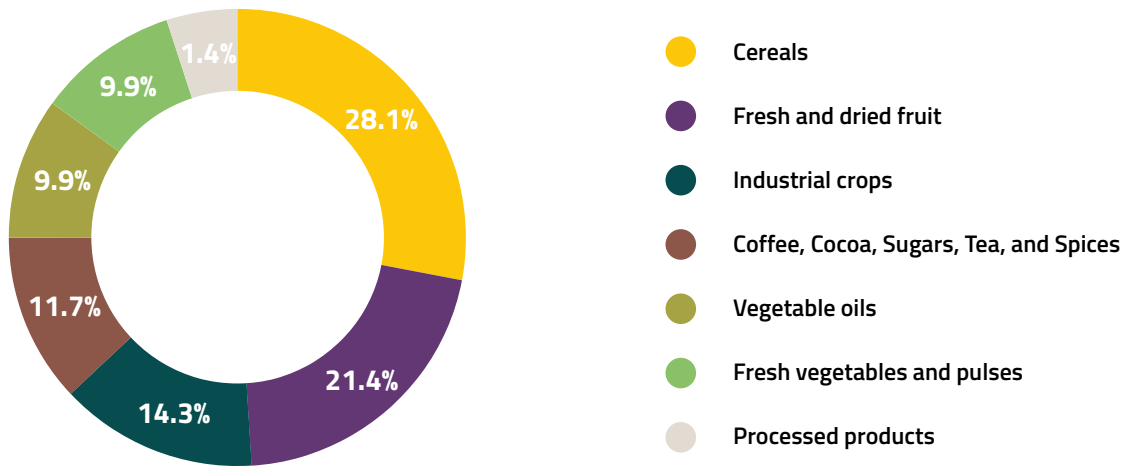
* 'Industrial crops' include soya meal

Source: Compilation by SINAB on TRACES data

In 2023, cereals (durum wheat, soft wheat, maize, rice, other cereals) continue to be the most imported category of organic products, with a 28.0% share in the total volume of organic products imported to Italy (+5.0% compared to 2022).
 Next, with a lower share, are fresh and dried fruit (bananas, nuts, frozen fruit, dates, figs and pineapples, apples and pears, grapes and other fresh fruit), accounting

for 21.4% (-0.3% compared to 2022), industrial crops (soya beans, soya meal, peanuts, linseed, sunflower seeds and other industrial crops) with 14.3%, remaining stable compared to 2022, and the category comprising coffee, cocoa, sugars, tea and spices with 11.7% (-4.4% compared to 2022). The other three categories (vegetable oils, vegetables and pulses, processed products) represent the final 24.6%. **(Chart 4.1)**.

Chart 4.1
Share of volumes of organic products imported to Italy from third countries by product category
 2023



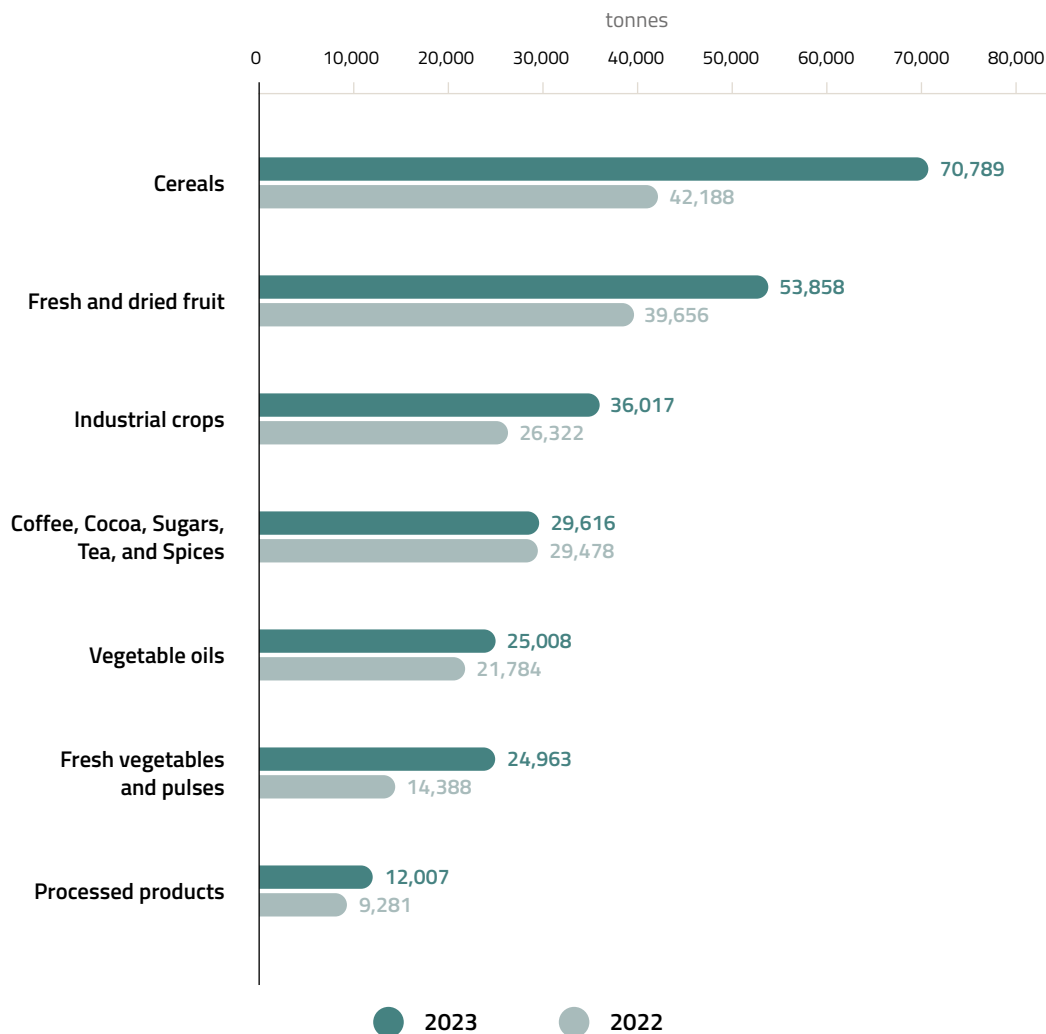
Source: Compilation by SINAB on TRACES data

Thus, in 2023, the overall amount of organic products imported from third countries is 37.8% higher than in 2022 (around 70,000 tonnes). Cereals are the main driver of this dynamic, with an increase in imports of 28,600

tonnes on the previous year. Fresh and dried fruit (+14,202 tonnes), vegetables and legumes (+10,575 tonnes) and industrial crops (+9,695 tonnes) also record a significant growth (**Table 5.1 and Chart 4.2**).

Chart 4.2

Volumes of organic products imported to Italy from third countries, by product category 2022 and 2023



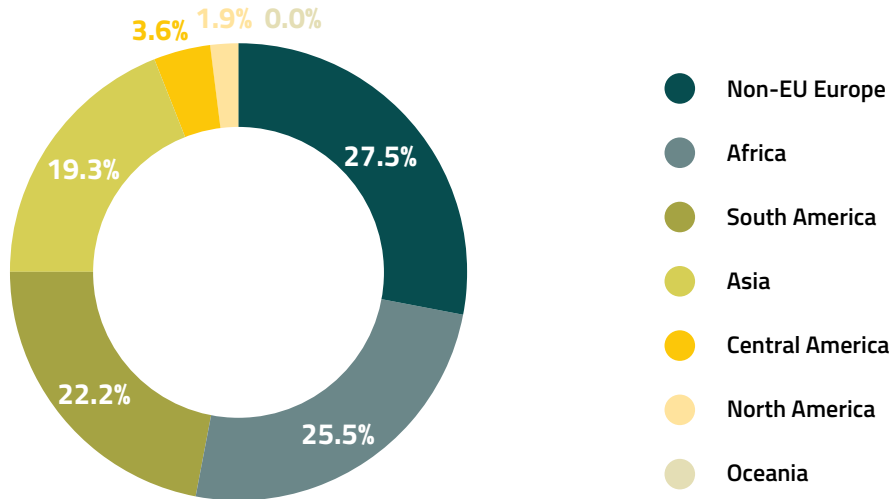
Source: Compilation by SINAB on TRACES data

European countries outside the European Union see a significant increase in the volumes of organic products exported to Italy in 2023, reaching a share of 27.5% of Italy's total organic imports. This growth is largely driven by increased imports of cereals, especially durum wheat

from Turkey. After non-EU Europe, Africa is the second most important area of origin with a share of 25.5% of total imported amounts, followed by South America (22.2%) and Asia (19.3%) (**Chart 4.3 and 4.4**).

Chart 4.3

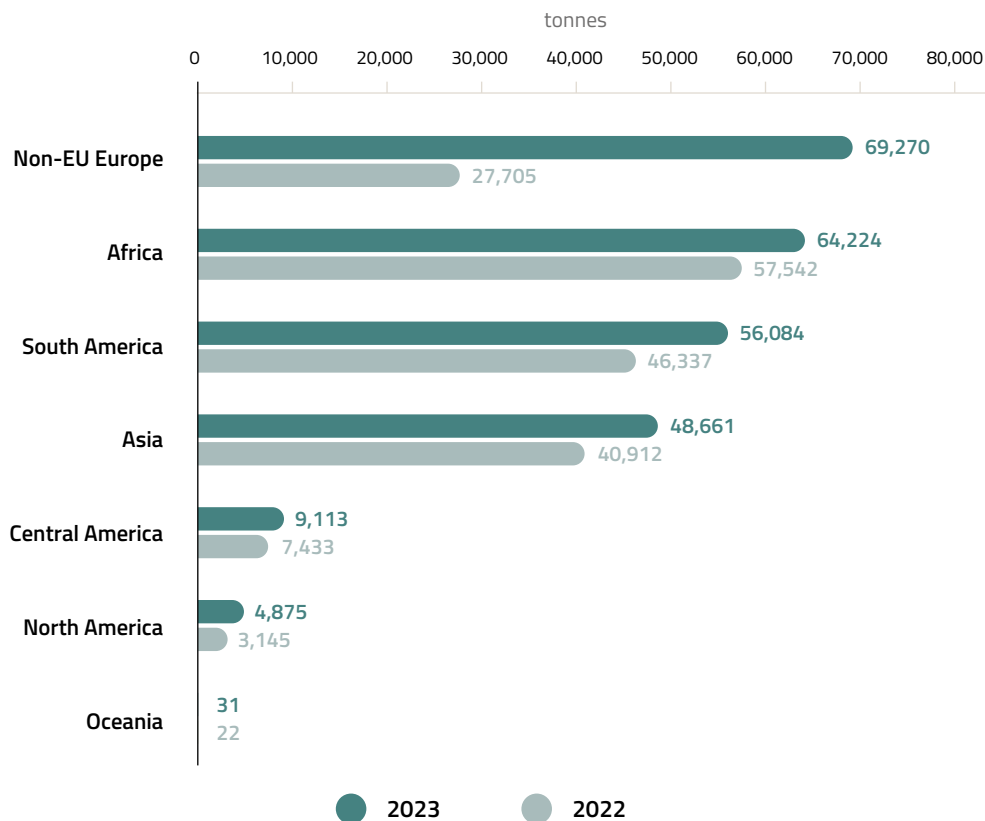
Share of volumes of organic products imported to Italy from third countries, by geographical area 2023



Source: Compilation by SINAB on TRACES data

Chart 4.4

Volumes of organic products imported to Italy from third countries, by geographical area 2022 and 2023



Source: Compilation by SINAB on TRACES data

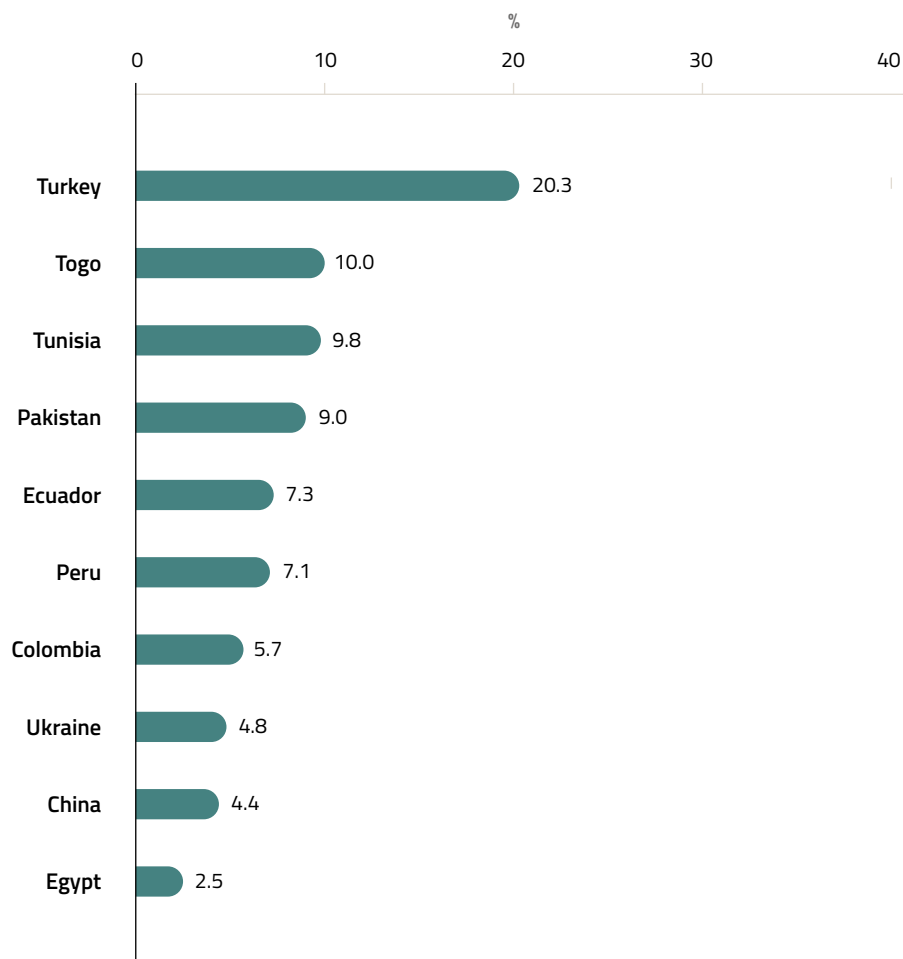
Regarding the top three countries of origin, the overall situation in 2023 shows slight variations from last year, with Turkey taking the lead (20.3%) of the total volume of imported organic products, followed by Togo (10.0%) and

Tunisia (9.8%) (Chart 4.5). More specifically, Turkey stands out for large exports of durum wheat, lentils and processed fruit and vegetables, while Togo and Tunisia respectively export large quantities of soya beans and olive oil.

Chart 4.5

Percentage share of imports from the top 10 third countries in total import volume of organic products into Italy

2023



Source: Compilation by SINAB on TRACES data

FOCUS ON IMPORTED CATEGORIES

Cereals

The considerable growth in cereal imports in 2023 (+28,600 tonnes) is largely due to an increase in volumes from Non-EU European countries, in particular durum wheat from Turkey and maize from Ukraine.

More specifically, the 29,647 tonnes of durum wheat imported in 2023 represent 11.8% of the total imports of organic products from third countries and account for 42.9% of the total annual increase in volume. It should be noted that in 2022, the imports of organic

durum wheat fell to zero due to market flare-up and price spikes. In 2023, the gradual fall in prices encouraged imports to recover, in particular those from Turkey, which increased tenfold compared to the average of the last decade, even for conventional products.

Soft wheat, almost exclusively sourced from Canada, also increased by 56.8% compared to 2022. In contrast, rice imports, primarily from Pakistan, fell by 8.1%, **(Chart 4.6 and Table 4.2)**.

Chart 4.6

Volumes of organic cereals imported to Italy from third countries by product category

2022 and 2023

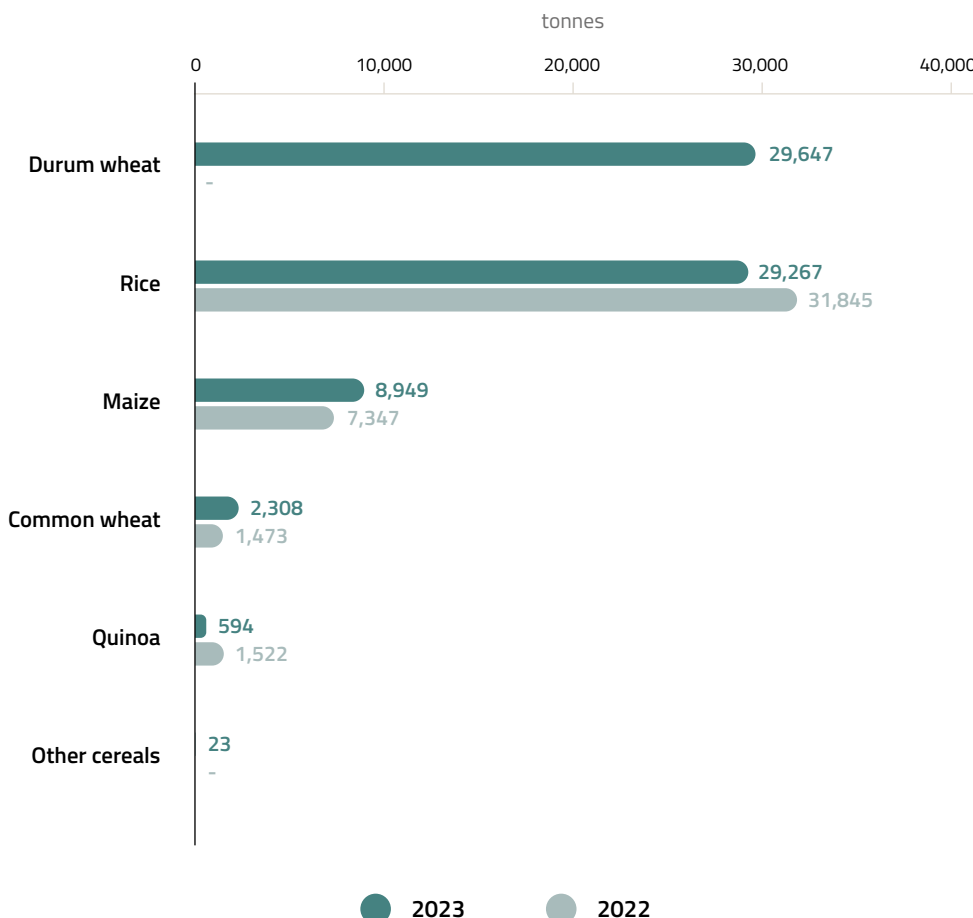


Table 4.2**Volumes of organic cereals imported to Italy from third countries, by product category and country of origin (tonnes)**

2023

Geographical area	Country	Durum wheat	Rice	Maize	Common wheat	Quinoa	Other cereals	Total cereals
Total cereals		29,647	29,267	8,949	2,308	594	23	70,789
North America	Total	130	-	-	2,235	-	18	2,383
	Canada	130	-	-	2,235	-	-	2,365
	United States	-	-	-	-	-	18	18
South America	Total	-	100	-	-	594	-	694
	Argentina	-	100	-	-	-	-	100
	Bolivia	-	-	-	-	207	-	207
	Peru	-	-	-	-	387	-	387
Asia	Total	-	29,167	-	-	-	5	29,172
	Cambodia	-	636	-	-	-	-	636
	China	-	-	-	-	-	5	5
	India	-	3,772	-	-	-	-	3,772
	Pakistan	-	22,033	-	-	-	-	22,033
	Thailand	-	2,725	-	-	-	-	2,725
Non-EU Europe	Total	29,517	-	8,949	73	-	-	38,539
	Bosnia and Herzegovina	-	-	445	-	-	-	445
	Serbia	-	-	-	51	-	-	51
	Turkey	29,517	-	18	-	-	-	29,535
	Ukraine	-	-	8,486	22	-	-	8,508

Source: Compilation by SINAB on TRACES data

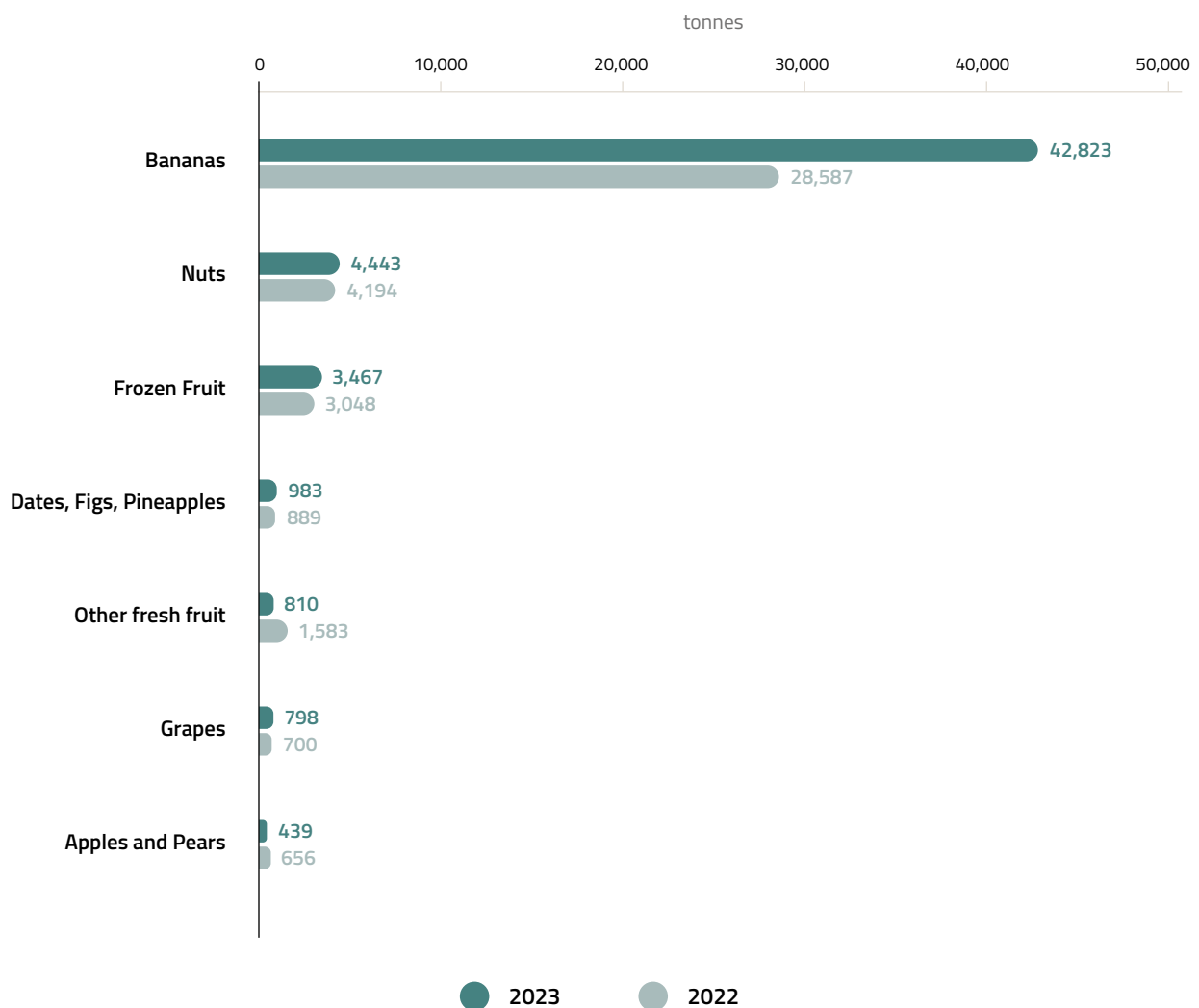


Fresh and dried fruit

Among fresh and dried fruit, organic banana imports were the highest, showing a growth of 49.8% from the previous year. The main countries of origin of organic bananas are Ecuador, Peru and Colombia. Nuts, around

65% of which come from non-EU Europe, mainly Turkey, are also noteworthy, although they are imported in much smaller quantities than bananas (Chart 4.7 and Table 4.3).

Chart 4.7
Volumes of organic fresh and dried fruit imported to Italy from third countries by product category
 2022 and 2023



Source: Compilation by SINAB on TRACES data

Table 4.3**Volumes of organic fresh and dried fruit imported to Italy from third countries, by product category and country of origin (tonnes)**

2023

Geographical area	Country	Bananas	Nuts	Frozen fruit	Dates, figs and pineapples	Other fresh fruit	Apples and pears	Grapes	Total fruit
Total fresh and dried fruit		42,823	4,443	3,467	983	906	439	798	53,858
Africa	Total	794	441	46	300	24	-	-	1,605
	Benin	-	206	-	-	-	-	-	206
	Burkina Faso	-	132	-	-	-	-	-	132
	Ghana	316	4	-	2	5	-	-	327
	Ivory Coast	478	94	-	-	-	-	-	572
	Kenya	-	1	-	-	-	-	-	1
	Morocco	-	-	46	2	-	-	-	48
	Nigeria	-	3	-	-	-	-	-	3
	South Africa	-	-	-	-	19	-	-	19
	Togo	-	-	-	20	-	-	-	20
	Tunisia	-	-	-	277	-	-	-	277
North America	Total	-	24	41	-	-	-	-	65
	Canada	-	-	41	-	-	-	-	41
	United States	-	24	-	-	-	-	-	24
Central America	Total	2,635	-	-	327	-	-	-	2,962
	Costa Rica	-	-	-	327	-	-	-	327
	Dominican Republic	2,635	-	-	-	-	-	-	2,635
South America	Total	39,395	457	43	-	681	439	-	41,015
	Argentina	-	210	-	-	70	439	-	718
	Bolivia	-	41	-	-	-	-	-	41
	Brasil	-	103	-	-	-	-	-	103
	Chile	-	75	43	-	588	-	-	706
	Colombia	9,647	-	-	-	-	-	-	9,647
	Ecuador	17,321	-	-	-	-	-	-	17,321
	Peru	12,427	29	-	-	24	-	-	12,480
Asia	Total	-	392	130	127	-	-	22	672
	China	-	81	-	-	-	-	-	81
	India	-	10	-	-	-	-	-	10
	Iran	-	-	-	-	-	-	-	22
	Israel	-	-	-	119	-	-	22	119
	Palestine	-	-	-	8	-	-	-	8
	Sri Lanka	-	54	130	0	-	-	-	185
	The Philippines	-	25	-	-	-	-	-	25
	Vietnam	-	223	-	-	-	-	-	223
Non-EU Europe	Total	-	3,129	3,207	228	200	-	776	7,540
	Albania	-	1	62	-	-	-	-	62
	Bosnia and Herzegovina	-	1	-	-	-	-	-	1
	Georgia	-	20	-	-	-	-	-	20
	Moldova	-	67	-	-	-	-	-	67
	Serbia	-	77	176	-	200	-	-	453
	Turkey	-	2,857	958	228	-	-	776	4,820
	Ukraine	-	105	2,011	-	-	-	-	2,116

Source: Compilation by SINAB on TRACES data

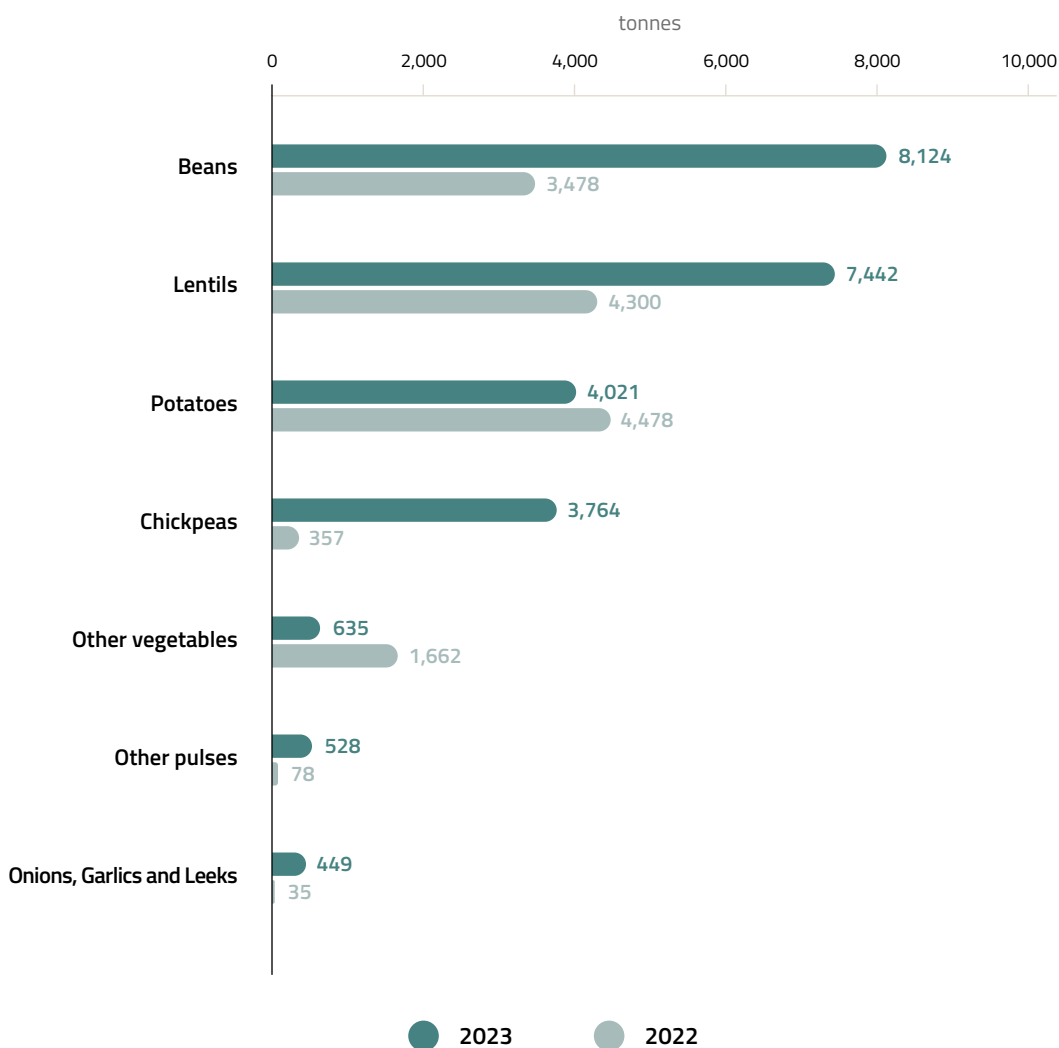
Fresh vegetables and pulses

Pulses are the most imported group in this product category, recording a +141.8% growth in imports compared to 2022. The increases in absolute numbers for beans (around 4,000 tonnes) and chickpeas and lentils (around 3,000 tonnes) are particularly noteworthy. Main imports

of beans came from China, lentils and chickpeas from Turkey and other pulses from Moldova. Among other vegetables, imports of potatoes from Egypt are significant, although they have recorded a notable decline of 10.1% in volume (**Chart 4.8 and Table 4.4**).

Chart 4.8

Volumes of organic fresh vegetables and pulses imported to Italy from third countries by product category 2022 and 2023



Source: Compilation by SINAB on TRACES data

Table 4.4**Volumes of organic fresh vegetables and pulses imported to Italy from third countries, by product category and country of origin (tonnes)**

2023

Geographical area	Country	Beans	Lentils	Chickpeas	Other vegetables	Potatoes	Onions, Garlics and Leeks	Other pulses	Total fresh vegetables and pulses
Total fresh vegetables and pulses		8,124	7,442	3,764	528	4,021	449	635	24,963
Africa	Total	885	-	-	-	4,021	237	302	5,445
	Egypt	885	-	-	-	4,021	237	302	5,445
North America	Total	317	280	-	-	-	-	-	597
	Canada	57	280	-	-	-	-	-	337
	United States	260	-	-	-	-	-	-	260
South America	Total	97	-	-	-	-	212	-	310
	Argentina	97	-	-	-	-	212	-	310
Asia	Total	6,528	428	-	0	-	-	256	7,212
	China	6,495	302	-	-	-	-	176	6,974
	Japan	0	-	-	-	-	-	-	0
	Kazakhstan	-	126	-	-	-	-	-	126
	Thailand	-	-	-	0	-	-	-	0
	Uzbekistan	32	-	-	-	-	-	80	112
Non-EU Europe	Total	298	6,734	3,764	528	-	-	76	11,399
	Moldova	-	-	-	528	-	-	-	528
	Montenegro	3	-	-	-	-	-	-	3
	Serbia	2	-	-	-	-	-	-	2
	Turkey	293	6,734	3,764	-	-	-	76	10,866

Source: Compilation by SINAB on TRACES data



Industrial crops

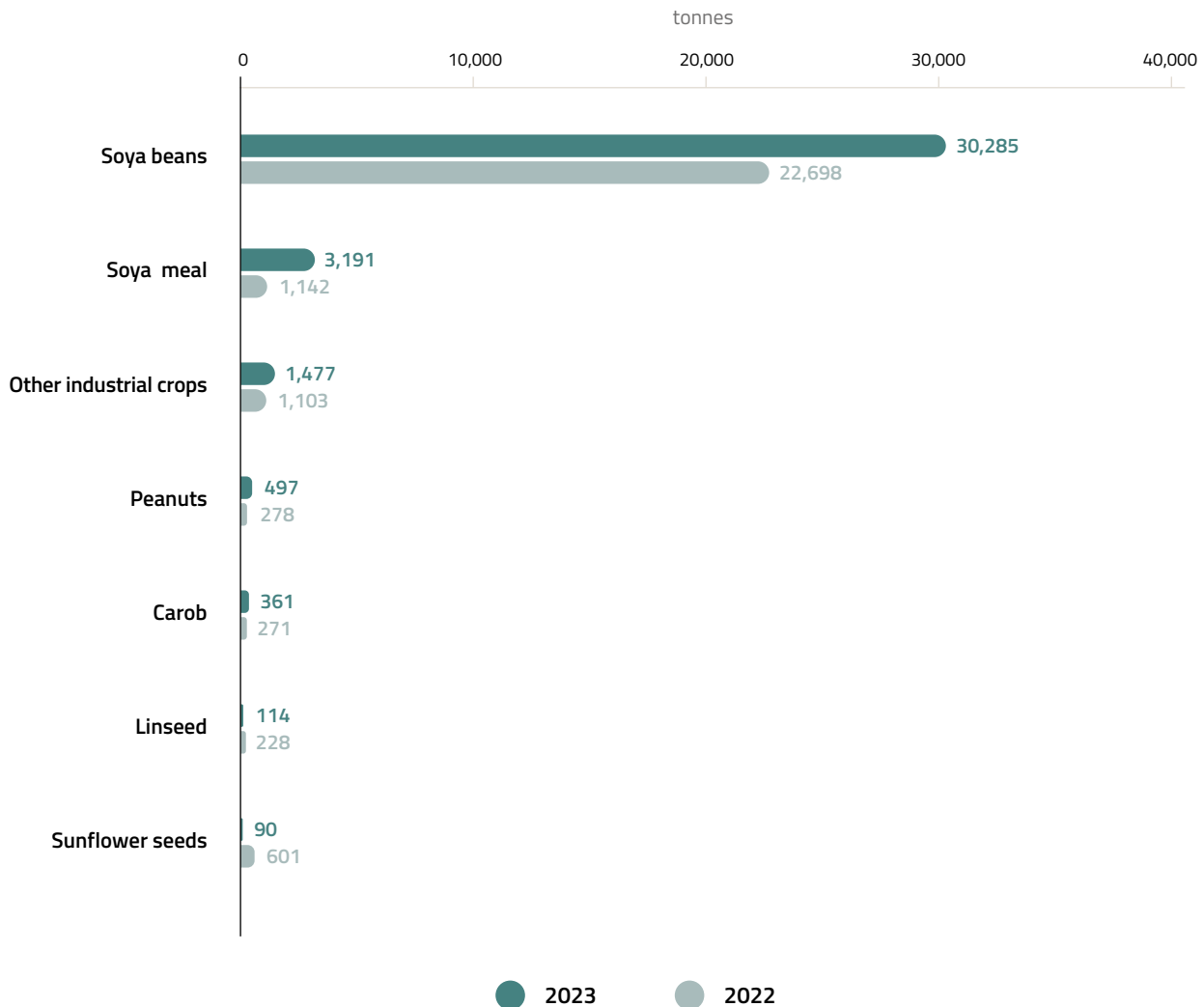
Among the industrial crops, soya beans are the most imported product (84% of the total in this category) and show an overall increase in import volumes of +33.4% compared to last year (Chart 4.9). Togo and Bosnia and Herzegovina are the leading third countries for organic

soya bean imports, accounting for 83.2% and 9.9% of the total, respectively.

Conversely, China continues to play a crucial role in soya meal imports, remaining the sole supplier in 2023 (Table 4.5).

Chart 4.9

Volumes of organic industrial crops imported to Italy from third countries, by product category 2022 and 2023



Source: Compilation by SINAB on TRACES data

Table 4.5**Volumes of organic industrial crops imported to Italy from third countries, by product category and country of origin (tonnes)**

2023

Geographical area	Country	Soya beans	Soya meal	Other industrial crops	Peanuts	Carob	Linseed	Sunflower seeds	Total Industrial crops
Total Industrial crops		30,285	3,191	1,477	497	361	114	90	36,017
Africa	Total	25,699	-	342	439	141	15	-	26,635
	Burkina Faso	504	-	-	-	-	-	-	504
	Egypt	-	-	254	439	-	15	-	707
	Ghana	-	-	0	-	-	-	-	0
	Kenya	-	-	9	-	-	-	-	9
	Morocco	-	-	57	-	70	-	-	127
	Namibia	-	-	7	-	-	-	-	7
	South Africa	-	-	-	-	29	-	-	29
	Togo	25,194	-	-	-	-	-	-	25,194
	Tunisia	-	-	15	-	42	-	-	57
North America	Total	15	-	60	-	78	-	-	153
	Canada	15	-	-	-	78	-	-	93
	Mexico	-	-	60	-	-	-	-	60
South America	Total	-	-	341	-	-	-	-	341
	Argentina	-	-	41	-	-	-	-	41
	Bolivia	-	-	67	-	-	-	-	67
	Chile	-	-	5	-	-	-	-	5
	Paraguay	-	-	227	-	-	-	-	227
Asia	Total	-	3,191	599	59	142	22	54	4,067
	China	-	3,191	253	59	108	-	54	3,665
	India	-	-	197	-	-	22	-	219
	Israel	-	-	1	-	34	-	-	34
	Pakistan	-	-	148	-	-	-	-	148
	Sri Lanka	-	-	1	-	-	-	-	1
Non-EU Europe	Total	4,572	-	135	-	1	77	36	4,821
	Albania	-	-	36	-	-	-	-	36
	Bosnia and Herzegovina	3,008	-	25	-	-	-	-	3,033
	Kosovo	-	-	2	-	-	-	-	2
	North Macedonia	-	-	-	-	1	-	-	1
	Turkey	-	-	61	-	-	77	36	174
	Ukraine	1,564	-	12	-	-	-	-	1,575
	United Kingdom	-	-	0	-	-	-	-	0

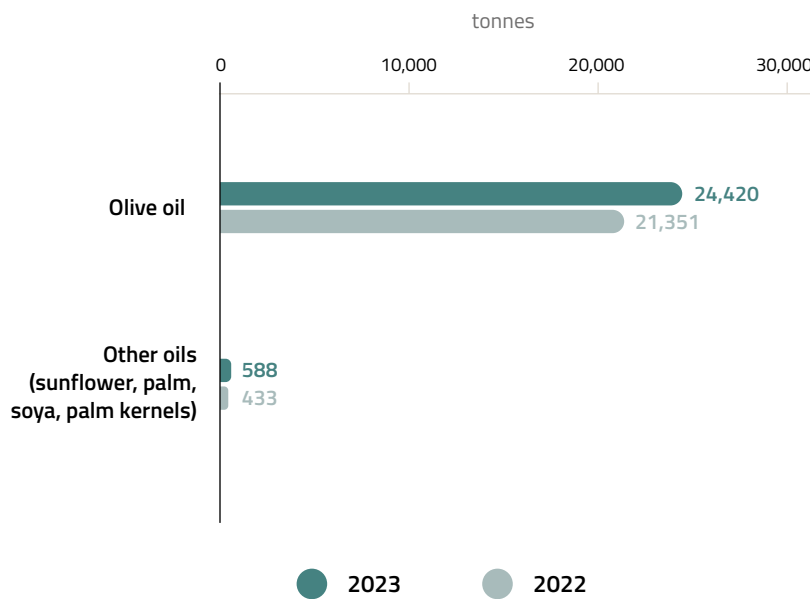
Source: Compilation by SINAB on TRACES data

Vegetable oils and fats

Continuing the trend from previous years, olive oil stands out as the primary import among vegetable oils and fats in 2023, with import volumes rising by 14.4% compared to 2022. Olive oil comes almost exclusive-

ly from Tunisia, with low amounts also imported from Albania. Small volumes are imported, mainly from Sri Lanka, in the category of other oils (Chart 4.10 and Table 4.6).

Chart 4.10
Volumes of organic vegetable oils and fats imported to Italy from third countries, by product category 2022 and 2023



Source: Compilation by SINAB on TRACES data

Table 4.6**Volumes of organic vegetable oils and fats imported to Italy from third countries, by product category and country of origin (tonnes)**

2023

Geographical area	Country	Olive oil	Other oils	Total vegetable oils and fats
Total vegetable oils and fats		24,420	588	25,008
Africa	Total	24,394	14	24,408
	Kenya	-	9	9
	Morocco	60	5	65
	Tunisia	24,334	-	24,334
South America	Total	-	1	1
	Chile	-	1	1
	Peru	-	0	0
Asia	Total	-	524	524
	China	-	19	19
	India	-	13	13
	Sri Lanka	-	474	474
	Thailand	-	0	0
	The Philippines	-	18	18
Non-EU Europe	Total	26	49	75
	Albania	26	-	26
	Turkey	-	23	23
	Ukraine	-	26	26

Source: Compilation by SINAB on TRACES data



Coffee, Cocoa, Sugars, Tea, and Spices

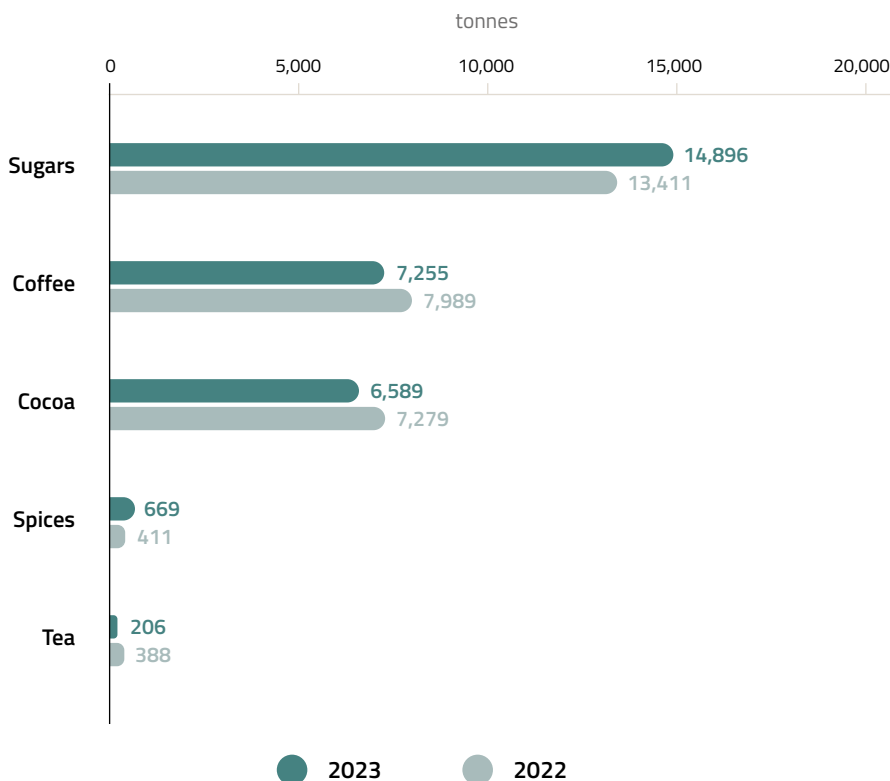
The main supply markets for products in this category are Latin American countries (Central and South America) and Asian countries (primarily, India, Laos, Thailand and Pakistan). Compared to the previous year, import volumes in 2023 reflect a growth in sugars (+11.1%), predominantly cane sugar (45.1% of total sugar imports),

and spices (+62.9%). In contrast, imports of tea (-46.8%), cocoa (-5%), and coffee (-9.2%) have decreased (**Chart 4.11**). Cane sugar is primarily sourced from Colombia, Costa Rica, India, and Peru, while coffee imports come mainly from Honduras, Peru, and the Democratic Republic of Congo (**Table 4.7**).

Chart 4.11

Volumes of organic coffee, cocoa, sugars, tea, and spices imported to Italy from third countries, by product category

2022 and 2023



Source: Compilation by SINAB on TRACES data

Table 4.7**Volumes of organic coffee, cocoa, sugars, tea, and spices imported to Italy from third countries by product category and country of origin (tonnes)**

2023

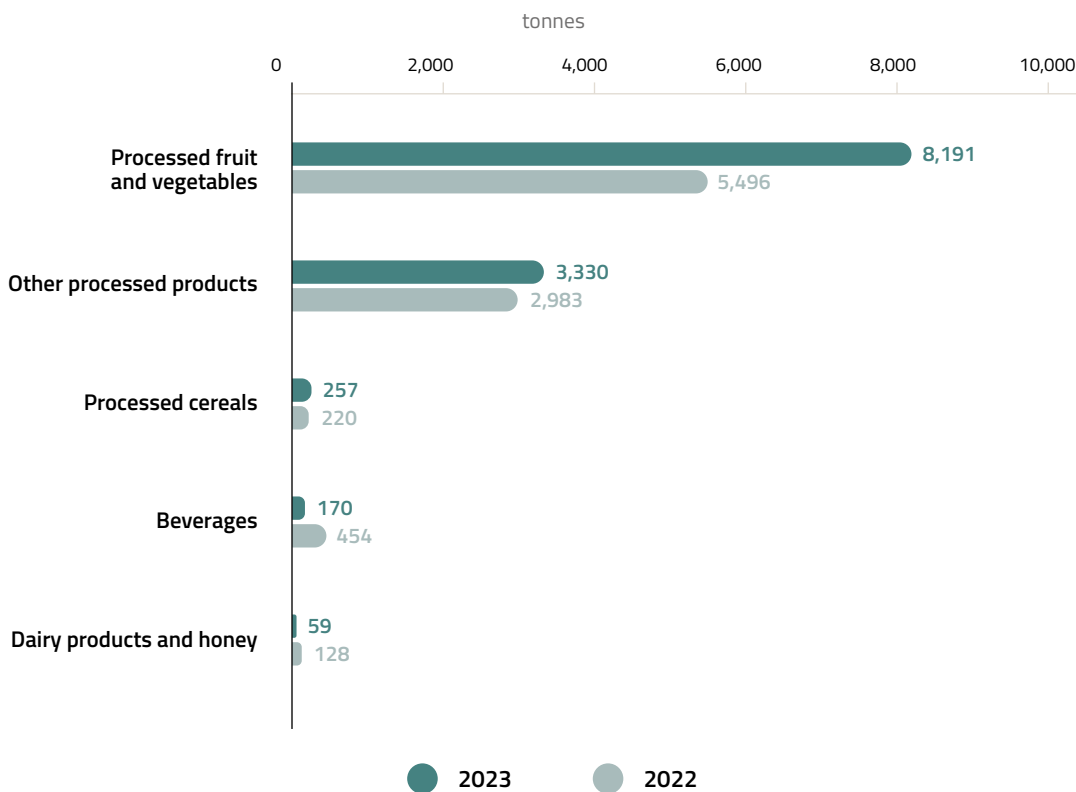
Geographical area	Country	Sugars	Coffee	Cocoa	Spices	Tea	Total coffee, cocoa, sugars, tea and spices
Total coffee, cocoa, sugars, tea and spices		14,896	7,255	6,589	669	206	29,616
Africa	Total	1,071	2,062	2,485	108	-	5,728
	Democratic Republic of Congo	-	1,010	50	-	-	1,060
	Egypt	-	-	-	108	-	108
	Ethiopia	-	94	-	-	-	94
	Ivory Coast	-	-	101	-	-	101
	Madagascar	-	-	-	1	-	1
	Mozambique	831	-	-	-	-	831
	Sierra Leone	-	-	24	-	-	24
	Tanzania	-	462	-	-	-	462
	Uganda	240	497	2,311	-	-	3,048
North America	Total	298	714	-	0	-	1,012
	Canada	112	-	-	-	-	112
	Mexico	184	714	-	-	-	898
	United States	2	-	-	0	-	2
Central America	Total	1,764	2,452	1,928	-	-	6,144
	Costa Rica	1,340	-	-	-	-	1,340
	Cuba	352	200	-	-	-	552
	Dominican Republic	-	-	1,928	-	-	1,928
	Guatemala	72	49	-	-	-	121
	Honduras	-	1,783	-	-	-	1,783
	Nicaragua	-	421	-	-	-	421
South America	Total	8,104	1,613	2,173	351	-	12,241
	Brazil	1,265	42	-	-	-	1,307
	Chile	-	3	-	-	-	3
	Colombia	4,563	184	-	-	-	4,747
	Ecuador	310	-	3	-	-	313
	Paraguay	857	-	-	-	-	857
	Peru	1,109	1,384	2,171	351	-	5,014
Asia	Total	3,659	414	-	196	180	4,448
	China	1	-	-	-	30	31
	India	1,331	308	-	133	92	1,863
	Indonesia	8	106	-	13	-	127
	Iran	-	-	-	0	-	0
	Japan	-	-	-	-	52	52
	Laos	941	-	-	-	-	941
	Pakistan	450	-	-	-	-	450
	Sri Lanka	0	-	-	14	6	20
	Thailand	708	-	-	-	-	708
	The Philippines	220	-	-	-	-	220
Vietnam	-	-	-	37	-	37	
Non-EU Europe	Total	0	-	2	13	27	43
	Bosnia and Herzegovina	-	-	-	4	-	4
	Turkey	-	-	-	9	-	9
	United Kingdom	0	-	2	-	- 27	29
Oceania	Total	-	-	-	0	-	0
	Australia	-	-	-	0	-	0

Processed products

In 2023, imports of processed products have seen a remarkable surge, particularly in the 'Processed Fruit and Vegetables' category, which recorded a 49.0% growth compared to the previous year. This category includes

a wide variety of products such as jams, fruit juices, and compotes (**Chart 4.12**). Turkey is the main source country while Sri Lanka, Bosnia and Herzegovina and the UK stand out in the category 'Other processed products' (**Table 4.8**).

Chart 4.12
Volumes of organic processed products imported to Italy from third countries, by product category
 2022 and 2023



Source: Compilation by SINAB on TRACES data

Table 4.8**Volumes of organic processed products imported to Italy from third countries (tonnes), by product category and country of origin**

2023

Geographical area	Country	Processed fruit and vegetables	Other processed products	Processed cereals	Beverages	Dairy products and honey	Total processed products
Total processed products		8,191	3,330	257	170	59	12,007
Africa	Total	354	49	-	-	-	403
	Ivory coast	-	2	-	-	-	2
	Mali	38	-	-	-	-	38
	Morocco	-	28	-	-	-	28
	South Africa	317	-	-	-	-	317
	Tunisia	-	19	-	-	-	19
North America	Total	531	125	-	-	9	665
	Canada	64	-	-	-	-	64
	Mexico	429	120	-	-	9	557
	United States	38	6	-	-	-	44
Central America	Total	7	-	-	-	-	7
	Costa Rica	7	-	-	-	-	7
South America	Total	1,136	249	-	82	16	1,483
	Argentina	-	-	-	35	13	48
	Brazil	443	0	-	-	3	446
	Chile	-	-	-	47	-	47
	Colombia	-	8	-	-	-	8
	Ecuador	623	63	-	-	-	685
	Peru	70	81	-	-	-	151
	Uruguay	-	98	-	-	-	98
Asia	Total	309	2,158	93	3	2	2,565
	Cambodia	-	54	-	-	-	54
	China	28	297	-	-	2	327
	India	121	32	-	-	-	153
	Israel	35	31	73	-	-	139
	Japan	1	44	5	3	-	53
	Pakistan	-	2	-	-	-	2
	Palestine	-	-	15	-	-	15
	Sri Lanka	1	1,607	-	-	-	1,608
	Thailand	-	72	-	-	-	72
	The Philippines	121	-	-	-	-	121
Vietnam	-	19	-	-	-	19	
Non-EU Europe	Total	5,829	744	164	84	33	6,854
	Albania	-	35	-	-	-	35
	Bosnia and Herzegovina	27	312	-	84	-	423
	Serbia	1	1	-	-	33	34
	Turkey	5,702	5	156	-	-	5,864
	United Kingdom	100	391	8	0	-	499
Oceania	Total	25	5	-	1	0	30
	Australia	-	5	-	-	-	5
	Fiji	25	-	-	-	-	25
	New Zealand	-	-	-	1	0	1

Source: Compilation by SINAB on TRACES data





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