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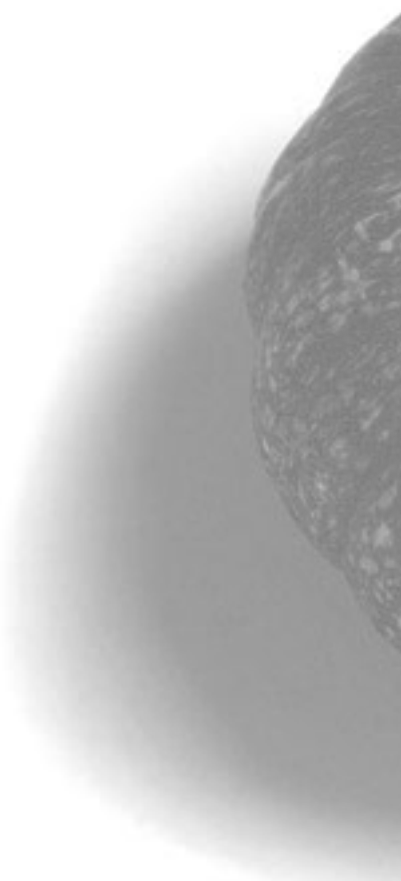
FACTS AND FIGURES ON ORGANIC FARMING IN ITALY 2019

THEMATIC VOLUME 4



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February 2020

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FOREWORD

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

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

The series comprises a total of six publications.

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

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

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

ACRONYMS

A.P.
Autonomous Province

CIHEAM Bari
Mediterranean Agronomic Institute of Bari

CMO
Common Market Organization

CN
Combined Nomenclature

EC
European Commission

EU
European Union

FSS
Farm structure survey

HORECA
Hotellerie-Restaurant-Café

ISMEA
Institute of Services for the Agricultural and Food Market

ISTAT
Italian National Institute of Statistics

MiPAAF
Ministry of Agriculture, Food and Forestry Policies

SIB
Organic Information System

SINAB
National Information System on Organic Agriculture

TARIC
Integrated Community Rate

TRACES
TRAde Control and Expert System

UAA
Utilised Agricultural Area

UNIVPM
Polytechnic University of March

AREAS, CROPS, OPERATORS AND LIVESTOCK

FIGURES ON ORGANIC FARMING

Data
MiPAAF
Ministry of Agriculture, Food and Forestry Policies

Source
Control Bodies
Regional Authorities
SIB - Organic Information System

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

As of 31 December 2018, the area under organic farming in Italy was almost 2 million hectares, with a number of operators close to 80,000. Data compiled by SINAB indicate that there has been an increase of over 800,000 hectares and 27,000 farms since 2010 **(Chart 3)**.

Compared to 2017, **organic areas** increased by 3% with 49,000 hectares more. In 2018, in line with national agriculture trends, the 3 main crop types under organic were still permanent grassland (540,012 ha), plants harvested green (392,218 ha) and cereals (326,083 ha). Following, by extent, were organic areas planted with olive trees (239,096 ha) and vineyards (106,447 ha). With respect to 2017, the percentage change of the area covered by these crop types indicates an increase for cereals (7%), plants harvested green (4%), with a stable trend for vineyards and olive trees (each growing by almost 1%), while for permanent grassland as a whole the area is in decline due to the drop in hectares under rough grazing (-8%) **(Table 1)**.

It is worth noting, in particular, that organic cultivation of durum wheat (4%), common wheat and spelt (20%), and barley (11%), sunflower (14%) and soya (25%), alfalfa (11%), tomatoes (12%) and dried pulses (7%) showed an increase. As far as permanent crops are concerned, 2018 recorded a positive trend compared to the previous year for the main crop types with values above the national average of 3%. Fruit of temperate climate zones grew by 10%, small fruit by 11% and fruit of subtropical climate zone by 7%, while citrus fruit fell by 10% **(Table 2)**.

The regional distribution of organic farmland in 2018 indicates that the largest areas are in Sicily (385,356 ha), Apulia (263,653 ha), Calabria (200,904 ha) and Emilia-Romagna (155,331 ha), with the four Regions totaling 51% of the whole national organic area **(Table 3)**.

When comparing with 2017, a different dynamics is observed in these four Regions: Sicily and Calabria report an almost 10% and 1% hectares reduction, respectively; Apulia shows a 4% growth, while Emilia-Romagna records a 15% increase, This value is largely exceeded by the first 4 areas of the country that, in 2018, grew the most, namely Campania (44%), Veneto (38%), the Autonomous Province of Bolzano (26%) and Lombardy (19%) **(Tables 3 and 4, Chart 1)**.

With respect to 2017, National data on **organic operators** indicates a 4% increase with over 3 thousand more operators, for a total number of **79,046** units included in the organic farming certification system.

There are **58,954** exclusive producers (agricultural holdings) that registered a 3% increase compared to the previous year; **9,257** exclusive processors[1] (7% more), **10,363** producers/processors (10% growth); and **472**[2] importers growing by 15% compared to 2017 **(Table 5)**.

Moreover, the regional distribution of organic operators confirms that Calabria (11,030 units), Sicily (10,736 units) and Apulia (9,275 units) take the lead. In 2018, a double-digit increase was recorded, with respect to the previous year, in Campania (43%), Emilia-Romagna (20%), Lombardy (18%), the Autonomous

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

[2]"Importers" include exclusive importers and importers who also carry out production and processing activities

Province of Bolzano (15%), Friuli-Venezia Giulia (13%) and Abruzzo (11%) **(Table 6 and Chart 2)**.

The share of organic farming on the national data (ISTAT FSS 2016) indicates that, in Italy, organic farming accounts for **15.5% of the national UAA**. Surface data by geographical areas highlights that, in Italy, every 100 hectares of UAA are organic: 5.6 hectares in the North-West; 9.3 hectares in the North-East; 20.1 hectares in the Centre and South and 19.2 hectares in the Islands **(Table 7)**.

Organic farms in Italy represent **6.1% of the total farms**; this share is quite consistent for the 5 main areas across the country, and there is a maximum variation of +-1.3%, respectively for the Centre and the North-West **(Table 7)**.

Data concerning the average farm size in Italy, in 2018, indicates that the **average size of an organic farm** in Italy **is 28.2 hectares**, compared to the national average of 11.0 hectares. Also for 2018, this figure is still high, due to the difference between the national share of organic areas (15.5%) and of organic farms (6.1%). Regarding the geographical areas, as expected, the greatest difference concerns the areas in the Centre, the South and the Islands, while there is more limited variability in the North-West and North-East of the country, where the average area of an organic farm amounts to 22.9 hectares and 21.4 hectares respectively **(Chart 4)**.

Concerning **organic aquaculture,** in 2018 there were 53 farms in Italy, that is, 36% more than the year before, mostly located in Northern Central Regions: Emilia-Romagna and Veneto bring together 77% of the industry's operators, mainly in mussel and shellfish farming. Sea bass and sea bream, instead, are farmed in Southern Central Regions **(Table 8)**.

As of 31 December 2018, **organic livestock** was in decrease, except for the number of cattle and poultry farms, totalling 375,414 and 3,482,435, respectively, with an increase of 12% and 15%. However, changes compared to 2017 are limited, despite the decrease and negative values for pigs (3%), sheep (8%), goats (5%), horses (15%) and beekeeping, with a 4% fall in the number of hives. Figures in absolute value for sheep are less optimistic and show a downward trend even considering the last 3 years **(Table 9)**.

All data presented are compiled by SINAB - a project of the Italian Ministry of Agricultural, Food and Forestry policies (MiPAAF) managed by ISMEA and CIHEAM Bari – based on the records as of 31 December 2018, provided by Control Bodies, Regional Authorities and the Organic Information System.

Table 1
AREAS AND CROPS UNDER ORGANIC FARMING IN ITALY
2017 AND 2018
IN HECTARES

	2017			2018	2018/2017
	Total organic	Under conversion	Converted	Total organic	% Change
TOTAL	**1,908,653**	**467,192**	**1,490,852**	**1,958,045**	**2.6**
Cereals	305,871	80,156	245,926	326,083	6.6
Dried pulses and protein crops for grain production	49,730	9,959	40,518	50,477	1.5
Root crops	1,807	902	1,794	2,696	49.2
Industrial crops	29,186	8,799	24,370	33,169	13.6
Plants harvested green	376,573	88,518	303,701	392,218	4.2
Other arable land crops	21,185	5,531	15,799	21,330	0.7
Vegetables *	55,056	15,748	45,407	61,155	11.1
Fruit**	33,761	11,777	25,139	36,917	9.3
Nuts	47,452	14,145	36,098	50,244	5.9
Citrus fruit	39,656	6,461	29,198	35,660	-10.1
Vineyards	105,384	32,049	74,399	106,447	1.0
Olives	235,741	56,742	182,354	239,096	1,4
Other permanent crops	4,902	1,085	1,894	2,979	-39.2
Permanent grassland (excl, rough grazing)	390,883	79,038	319,412	398,450	1.9
Rough grazing	153,166	37,868	103,693	141,562	-7.6
Fallow land	58,301	18,414	41,148	59,562	2.2
Other categories not included in the total***	259,878	93,478	202,252	295,730	13.8

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

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

Table 2
ORGANIC AREAS BY MAIN CROP TYPES IN ITALY
2017 AND 2018
IN HECTARES

	2017 Area in Italy			2018 Area in Italy	2018/2017
	Total organic	Under conversion	Converted	Total organic	% Change
CEREALS FOR GRAIN PRODUCTION (incl. seeds)	**305,871**	**80,156**	**245,926**	**326,083**	**6.6**
Durum wheat	127,938	30,545	101,974	132,519	3.6
Common wheat and spelt	52,026	13,199	49,335	62,535	20.2
Rye	393	31	321	352	-10.4
Barley	39,657	11,412	32,650	44,062	11.1
Oats	21,571	5,892	16,988	22,880	6.1
Grain maize	15,390	6,085	12,194	18,278	18.8
Triticale	4,025	863	3,128	3,991	-0.8
Other cereals	29,464	6,969	16,665	23,634	-19.8
Rice	15,407	5,160	12,672	17,832	15.7
ROOT CROPS	**1,807**	**902**	**1,794**	**2,696**	**49.2**
Potatoes (incl. early and seed potatoes)	1,305	408	1,055	1,463	12.1
Sugar beet (excl. seeds)	79	204	228	432	446.2
Other root crops	423	290	511	801	89.3
INDUSTRIAL CROPS	**29,186**	**8,799**	**24,370**	**33,169**	**13.6**
Oil seeds	**21,768**	**7,042**	**18,539**	**25,581**	**17.5**
Sunflower	8,069	2,332	6,858	9,190	13.9
Soya	9,207	4,064	7,483	11,547	25.4
Rape and turnip rapee	2,045	394	2,262	2,656	29.9
Linseed	2,179	194	1,780	1,973	-9.4
Other oil seeds	268	58	156	215	-20.0
Tobacco	**104**	**72**	**57**	**130**	**24.7**
Hops	**8**	**6**	**8**	**13**	**72.1**
Textile crops	**429**	**130**	**261**	**391**	**-9.0**
Cotton	0	0	0	0	-
Other textile crops	429	130	261	391	-9.0
Aromatic plants, medicinal and culinary plants	**5,205**	**1,153**	**4,069**	**5,222**	**0.3**
Other industrial crops	**1,671**	**396**	**1,436**	**1,832**	**9.7**

Table 2
ORGANIC AREAS BY MAIN CROP TYPES IN ITALY
2017 AND 2018
IN HECTARES

	2017 Area in Italy			2018 Area in Italy	2018/2017
	Total organic	Under conversion	Converted	Total organic	% Change
PLANTS HARVESTED GREEN	**376,573**	**88,518**	**303,701**	**392,218**	**4.2**
Total Annual plants harvested green	**78,941**	**18,921**	**64,263**	**83,184**	**5.4**
Green maize	2,308	1,002	1,608	2,610	13.1
Other annual plants harvested green	76,633	17,919	62,655	80,574	5.1
Temporary grasses and grazings	**115,974**	**27,182**	**89,792**	**116,974**	**0.9**
Other plants harvested green	**181,657**	**42,414**	**149,646**	**192,060**	**5.7**
Lucerne (Alfalfa)	113,024	27,636	98,248	125,884	11.4
Other	68,633	14,778	51,398	66,176	-3.6
FRESH VEGETABLES, MELONS, STRAWBERRIES, CULTIVATED MUSHROOMS	**55,056**	**15,748**	**45,407**	**61,155**	**11.1**
All brassicas (excl. roots)	**6,276**	**1,755**	**4,811**	**6,566**	**4.6**
Cauliflower and broccoli	2,987	1,123	2,038	3,161	5.8
Cabbage (white)	1,745	191	1,200	1,391	-20.3
Other brassicas	1,544	442	1,573	2,014	30.4
Leafy or stalk vegetables (excl. brassicas)	**8,814**	**3,536**	**7,548**	**11,084**	**25.8**
Celery	88	15	76	90	3.1
Leeks	93	18	84	102	9.8
Lettuces	373	261	449	710	90.5
Endives	299	230	181	411	37.3
Spinach	751	251	884	1,134	51.1
Asparagus	1,690	755	1,225	1,979	17.1
Chicory	928	336	929	1,265	36.3
Artichokes	1,181	478	834	1,313	11.1
Other leafy or stalk vegetables	3,411	1,193	2,886	4,079	19.6
Vegetables cultivated for fruit	**10,144**	**2,920**	**8,359**	**11,278**	**11.2**
Tomatoes	6,241	1,846	5,152	6,998	12.1
Cucumbers	35	4	35	39	13.5
Gherkins	0	0	0	0	-
Melons	995	143	675	818	-17.7
Water melons	270	130	215	345	27.6
Other vegetables cultivated for fruit	2,604	797	2,282	3,079	18.3

Table 2
ORGANIC AREAS BY MAIN CROP TYPES IN ITALY
2017 AND 2018
IN HECTARES

	2017 Area in Italy			2018 Area in Italy	2018/2017
	Total organic	Under conversion	Converted	Total organic	% Change
Root tuber and bulb vegetables	**2,163**	**613**	**2,116**	**2,729**	**26.2**
Carrots	867	190	831	1,021	17.7
Garlic	159	44	295	339	113.7
Onions	663	313	493	807	21.6
Shallots	14	0	16	16	18.1
Other root tuber and bulb vegetables	460	66	481	546	18.7
Legumes	**22,006**	**5,213**	**18,339**	**23,551**	**7.0**
Peas	5,889	1,869	4,103	5,972	1.4
Beans	1,458	452	1,315	1,767	21.2
Other legumes	14,658	2,892	12,921	15,812	7.9
Other vegetables	**5,316**	**1,576**	**3,947**	**5,523**	**3.9**
Strawberries	**255**	**105**	**211**	**316**	**24.2**
Cultivated mushrooms	**84**	**30**	**77**	**107**	**28.2**
FRUIT*	**33,761**	**11,777**	**25,139**	**36,917**	**9.3**
Fruit of temperate climate zones	**24,827**	**8,871**	**18,455**	**27,326**	**10.1**
Apples	6,201	2,823	4,576	7,400	19.3
Pears	2,033	809	1,662	2,471	21.6
Peaches	2,236	821	1,644	2,466	10.3
Apricots	2,982	931	2,405	3,335	11.8
Nectarines	325	113	220	333	2.3
Cherries	3,910	1,337	3,059	4,395	12.4
Plums	1,227	327	982	1,309	6.7
Other fruit of temperate climate zones	5,911	1,709	3,907	5,616	-5.0
Berries (soft fruit)	**515**	**191**	**379**	**570**	**10.7**
Blackcurrant	49	19	38	57	14.3
Raspberries	119	47	90	137	15.3
Other berries	347	125	252	377	8.7

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

Table 2
ORGANIC AREAS BY MAIN CROP TYPES IN ITALY
2017 AND 2018
IN HECTARES

	2017 Area in Italy			2018 Area in Italy	2018/2017
	Total organic	Under conversion	Converted	Total organic	% Change
Fruit of sub-tropical climate zones	**8,419**	**2,715**	**6,305**	**9,020**	**7.1**
Figs	557	265	389	653	17.3
Kiwis	5,437	1,786	4,172	5,958	9.6
Avocado	64	9	60	69	8.0
Bananas	0	0	0	0	-
Other Fruit of sub-tropical climate zones	2,361	656	1,684	2,340	-0.9
NUTS	**47,452**	**14,145**	**36,098**	**50,244**	**5.9**
Walnuts	1,483	578	1,002	1,580	6.5
Hazel nuts	12,299	4,527	8,957	13,484	9.6
Almonds	17,491	4,018	13,327	17,345	-0.8
Chestnuts	15,348	4,845	12,144	16,990	10.7
Other nuts	832	178	668	845	1.7
CITRUS FRUIT	**39,656**	**6,461**	**29,198**	**35,660**	**-10.1**
Pomelos and grapefruit	108	21	133	154	42.0
Lemons and acid limes	7,982	1,382	5,459	6,841	-14.3
Oranges	20,951	3,384	15,241	18,626	-11.1
Other citrus fruit (small citrus fruit)	10,614	1,674	8,365	10,039	-5.4
VINEYARDS	**105,384**	**32,049**	**74,399**	**106,447**	**1.0**
Wine grape vineyards	103,207	31,349	72,872	104,221	1.0
Table grape vineyards	2,177	700	1,527	2,226	2.3
Vineyards for raisin production	0	0	0	0	-
OLIVES	**235,741**	**56,742**	**182,354**	**239,096**	**1.4**
Table olives	979	209	758	967	-1.2
Oil olives	234,762	56,533	181,596	238,129	1.4

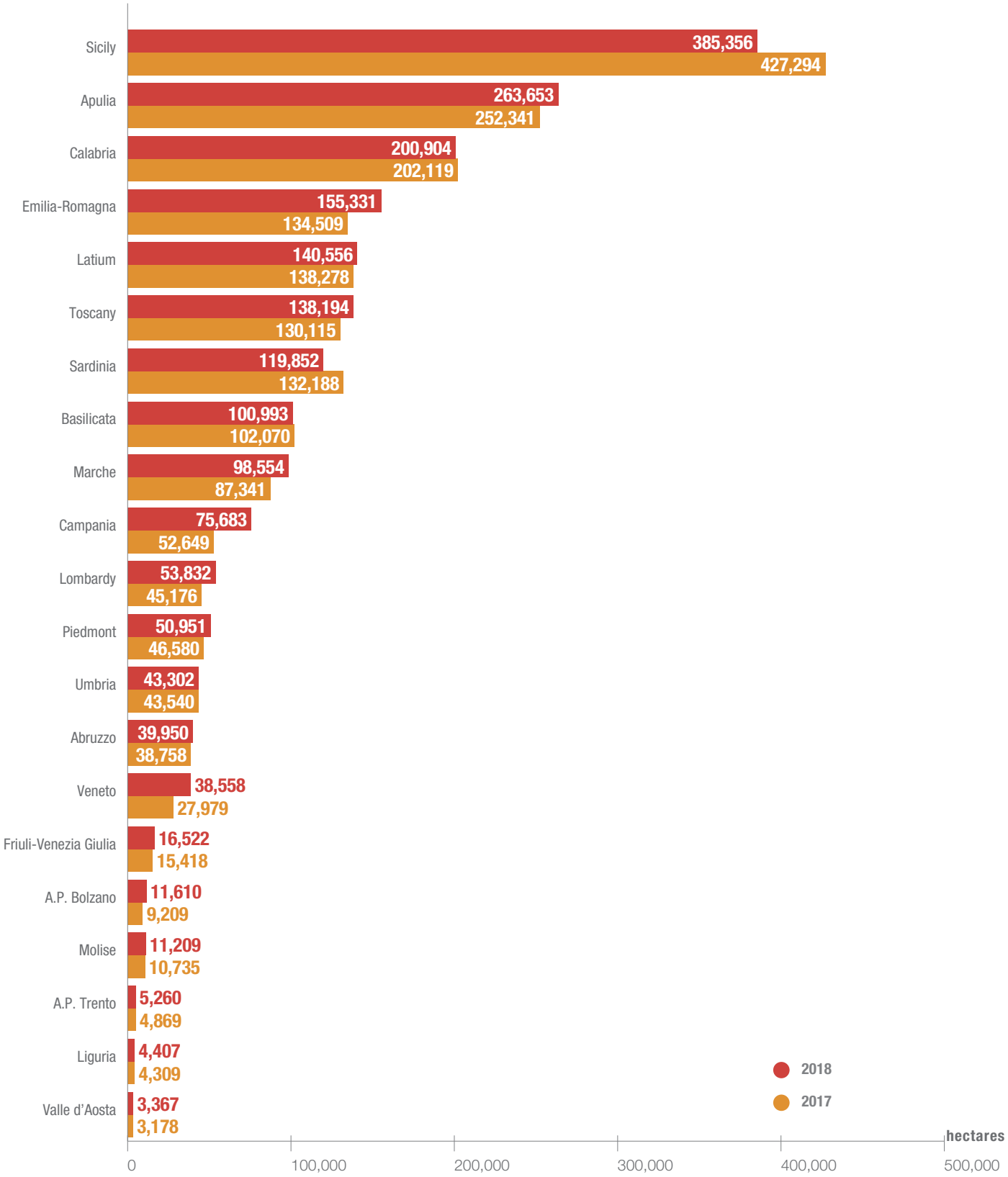
Source: Compiled by SINAB based on data provided by Control Bodies

Table 3
REGIONAL DISTRIBUTION OF ORGANIC AREAS IN ITALY
2017 AND 2018
IN HECTARES

	Organic area		% change
	2017	2018	2018/2017
ITALY	**1,908,653**	**1,958,045**	**2.6**
Abruzzo	38,758	39,950	3.1
Apulia	252,341	263,653	4.5
Basilicata	102,070	100,993	-1.1
Calabria	202,119	200,904	-0.6
Campania	52,649	75,683	43.8
Emilia-Romagna	134,509	155,331	15.5
Friuli-Venezia Giulia	15,418	16,522	7.2
Latium	138,278	140,556	1.6
Liguria	4,309	4,407	2.3
Lombardy	45,176	53,832	19.2
Marche	87,341	98,554	12.8
Molise	10,735	11,209	4.4
A.P. Bolzano	9,209	11,610	26.1
A.P. Trento	4,869	5,260	8.0
Piedmont	46,580	50,951	9.4
Sardinia	132,188	119,852	-9.3
Sicily	427,294	385,356	-9.8
Tuscany	130,115	138,194	6.2
Umbria	43,540	43,302	-0.5
Valle d'Aosta	3,178	3,367	5.9
Veneto	27,979	38,558	37.8

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

Chart 1
REGIONAL DISTRIBUTION OF ORGANIC AREAS IN ITALY
2017 AND 2018
IN HECTARES



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

Infographic 1
REGIONAL DISTRIBUTION OF ORGANIC AREAS IN ITALY
2018
IN HECTARES

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

Table 4
REGIONAL DISTRIBUTION OF ORGANIC AREAS BY MAIN CROP TYPES
2018
IN HECTARES

	Cereals	Protein crops*	Root crops	Industrial crops	Plants harvested greens	Other arable land crops	Vegetables **	Fruit***	Nuts	Citrus fruit	Vineyards	Olives	TOTAL CROPS
ITALY	**326,083**	**50,477**	**2,696**	**33,169**	**392,218**	**21,330**	**61,155**	**36,917**	**50,244**	**35,660**	**106,447**	**239,096**	**1,958,045**
Abruzzo	4,348	430	253	249	8,858	402	1,229	179	118	4	4,322	3,428	**39,950**
Apulia	55,073	11,239	145	3,443	29,163	5,297	14,462	6,647	7,475	1,852	17,024	74,047	**263,653**
Basilicata	35,684	9,379	5	1,222	17,332	81	3,908	1,707	368	975	959	5,537	**100,993**
Calabria	15,441	1,272	214	555	33,681	4,397	1,569	3,648	2,657	10,799	4,425	67,726	**200,904**
Campania	10,273	1,825	218	466	12,963	710	4,693	2,599	9,670	140	2,065	9,757	**75,683**
Emilia-Romagna	32,678	1,845	608	4,573	61,554	211	6,796	3,022	1,575	2	4,497	980	**155,331**
Friuli-Venezia Giulia	1,621	137	10	971	3,287	79	376	351	57	0	1,352	48	**16,522**
Latium	15,494	2,090	90	897	39,132	616	4,985	2,608	8,835	12	2,239	8,626	**140,556**
Liguria	32	0	6	114	99	9	60	20	49	1	47	307	**4,407**
Lombardy	23,386	581	79	3,362	10,552	198	2,823	650	86	3	3,957	328	**53,832**
Marche	18,453	4,031	116	4,207	28,226	2,200	3,394	507	271	2	5,682	2,814	**98,554**
Molise	3,032	790	2	532	2,672	23	684	256	161	0	457	931	**11,209**
A.P. Bolzano	128	0	41	22	127	0	60	2,813	10	0	597	7	**11,610**
A.P. Trento	45	0	37	30	84	16	97	716	38	0	1,050	83	**5,260**
Piedmont	11,313	365	201	2,632	5,856	194	1,723	2,788	3,214	15	3,469	115	**50,951**
Sardinia	5,194	286	96	201	17,957	2,363	722	184	171	68	1,538	3,543	**119,852**
Sicily	53,578	12,752	116	898	64,156	2,904	6,353	3,952	13,572	21,768	30,660	39,260	**385,356**
Tuscany	24,260	2,426	256	2,847	41,140	1,233	4,329	1,146	1,231	19	15,059	15,600	**138,194**
Umbria	5,792	632	43	1,326	7,874	200	1,408	129	543	0	900	5,596	**43,302**
Valle d'Aosta	11	0	3	1	665	23	4	7	2	0	23	0	**3,367**
Veneto	10,248	399	156	4,622	6,842	173	1,480	2,987	140	0	6,124	365	**38,558**

**Dried pulses and protein crops for grain production*
***Fresh vegetables, melons, strawberries, cultivated mushrooms*
****Fruit includes "fruit of temperate climate zones", "fruit of sub-tropical climate zones", "berries" (soft fruit)*
Source: Compiled by SINAB based on data provided by Control Bodies

Table 5
ORGANIC OPERATORS BY CATEGORY
2018 AND 2017
NUMBER

	Organic operators		% change
	2017	2018	2018/2017
TOTAL	**75,873**	**79,046**	**4.2**
Exclusive producers	57,370	58,954	2.8
Exclusive processors	8,689	9,257	6.5
Producers / Processors	9,403	10,363	10.2
Importers*	411	472	14.8

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

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

Infographic 2
REGIONAL DISTRIBUTION OF ORGANIC OPERATORS IN ITALY
2018
NUMBER

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

Table 6
REGIONAL DISTRIBUTION OF ORGANIC OPERATORS BY CATEGORY IN ITALY
2017 AND 2018
NUMBER

	No operators 2017	No operators 2018					Percent change 2018/2017
	Total	Exclusive producers	Producers/ Processors	Exclusive processors	Importers*	Total	%
ITALY	**75,873**	**58,954**	**10,363**	**9,257**	**472**	**79,046**	**4.2**
Abruzzo	1,799	1,407	309	271	3	1,990	10.6
Apulia**	9,378	7,316	1,169	778	12	9,275	-1.1
Basilicata	2,235	2,064	102	105	0	2,271	1.6
Calabria	11,167	9,513	1,199	313	5	11,030	-1.2
Campania	4,215	5,107	362	548	25	6,042	43.3
Emilia-Romagna**	4,940	4,192	611	1,038	79	5,920	19.8
Friuli-Venezia Giulia	890	668	147	178	9	1,002	12.6
Latium	4,664	3,696	545	492	13	4,746	1.8
Liguria	470	241	82	156	17	496	5.5
Lombardy	2,661	1,517	472	1,069	86	3,144	18.2
Marche**	3,051	2,427	220	313	7	2,967	-2.8
Molise	474	392	40	70	2	504	6.3
A.P. Bolzano	1,464	1,245	123	303	13	1,684	15.0
A.P. Trento	1,220	1,022	122	144	2	1,290	5.7
Piedmont**	2,906	1,960	557	556	62	3,135	7.9
Sardinia	2,095	1,714	155	119	3	1,991	-5.0
Sicily	11,626	8,166	1,597	947	26	10,736	-7.7
Tuscany	5,141	2,813	1,714	674	34	5,235	1.8
Umbria**	1,824	1,408	359	194	10	1,971	8.1
Valle d'Aosta	97	61	17	15	0	93	-4.1
Veneto**	3,556	2,025	461	974	64	3,524	-0.9

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

***Data are provided by the Regional Authorities*

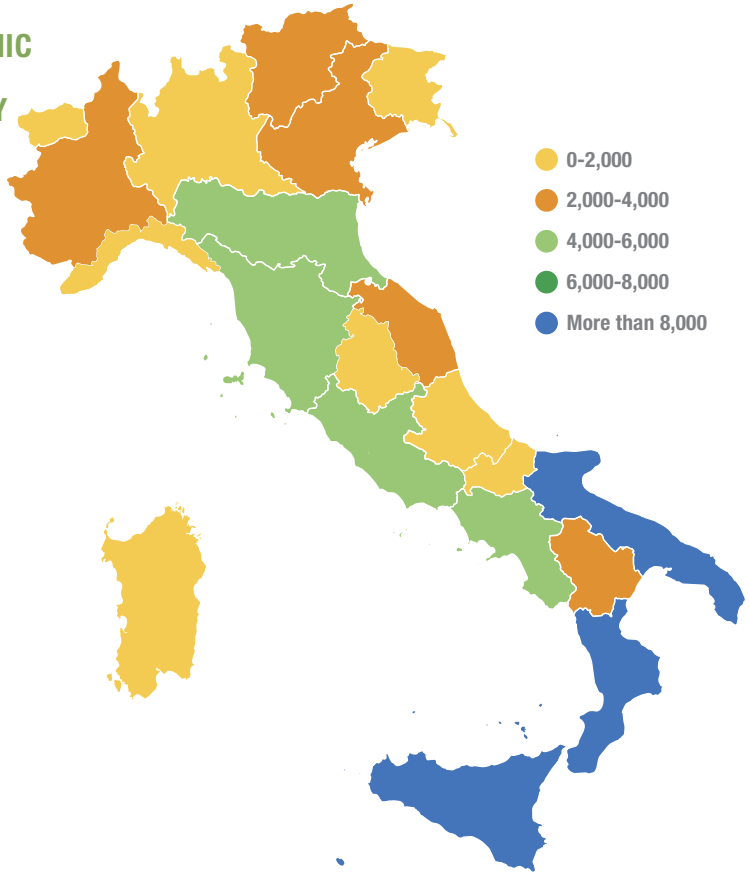
Source: Compiled by SINAB based on data provided by Control Bodies, Regional Authorities and SIB

Infographic 3

REGIONAL DISTRIBUTION OF ORGANIC PRODUCERS(INCLUDING PRODUCERS/PROCESSORS) IN ITALY

2018

NUMBER

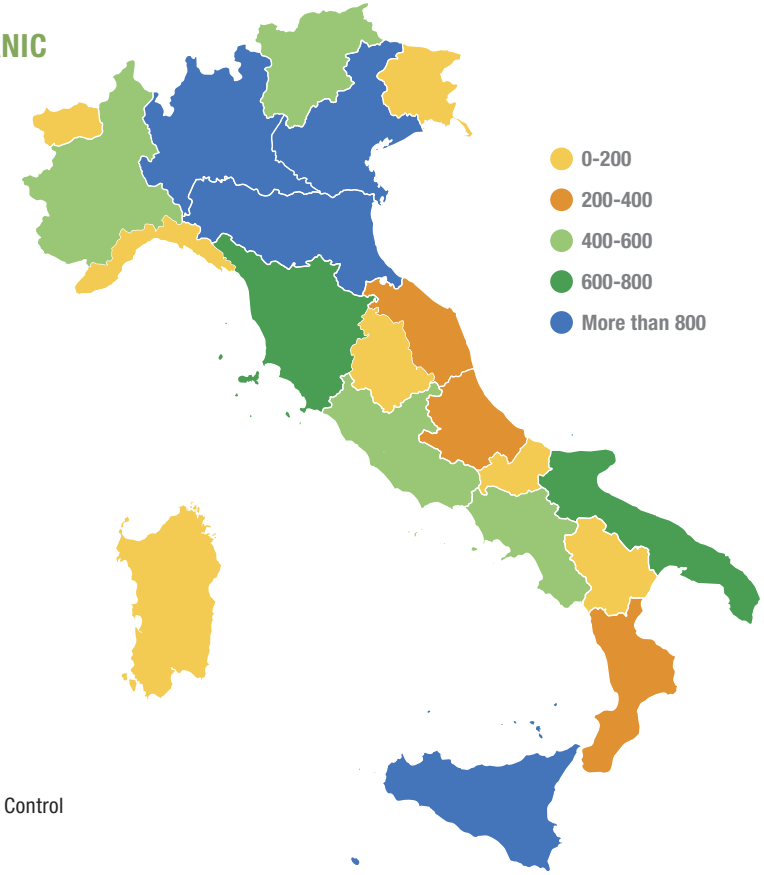


Infographic 4

REGIONAL DISTRIBUTION OF ORGANIC EXCLUSIVE PROCESSORS IN ITALY

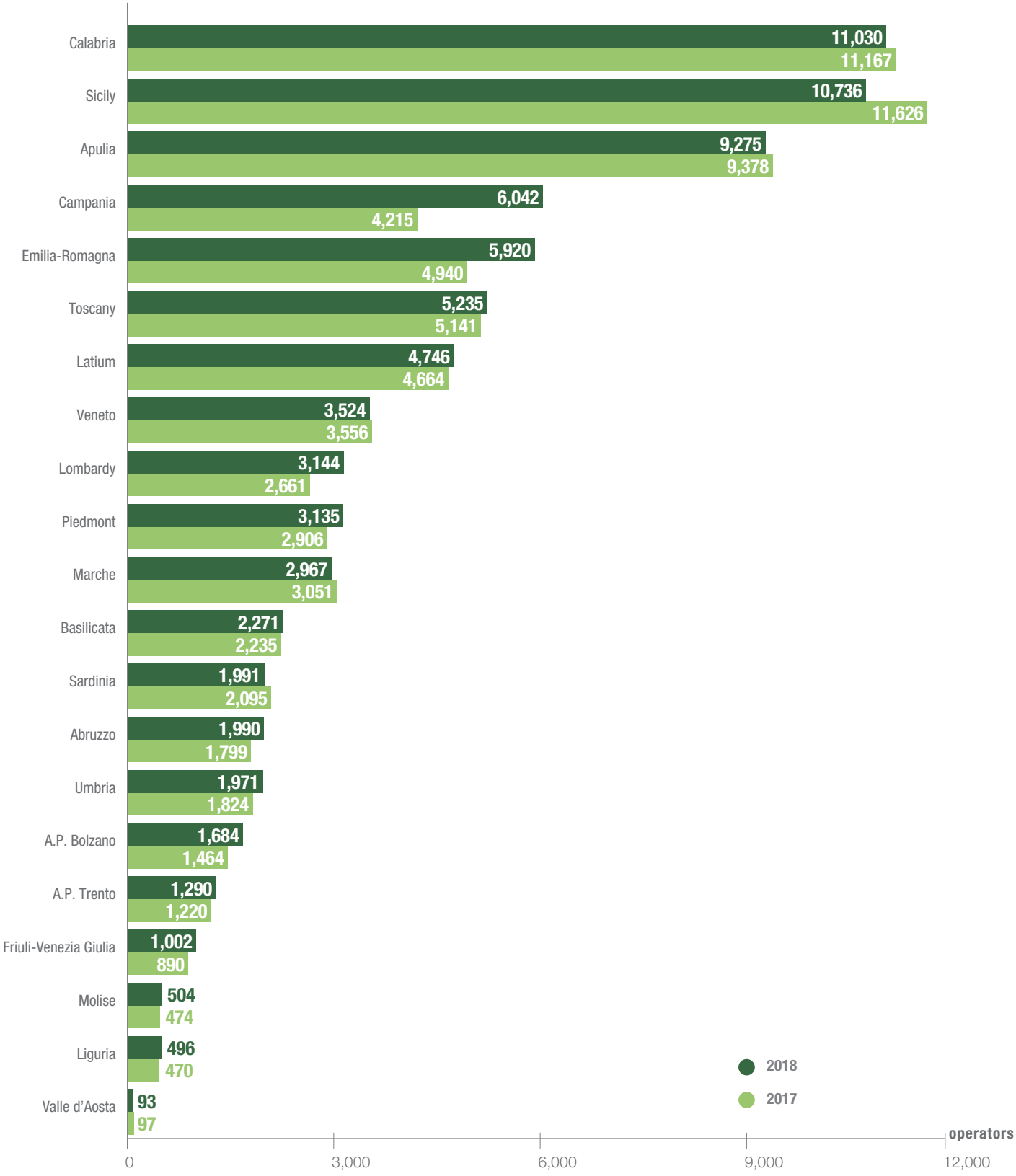
2018

NUMBER



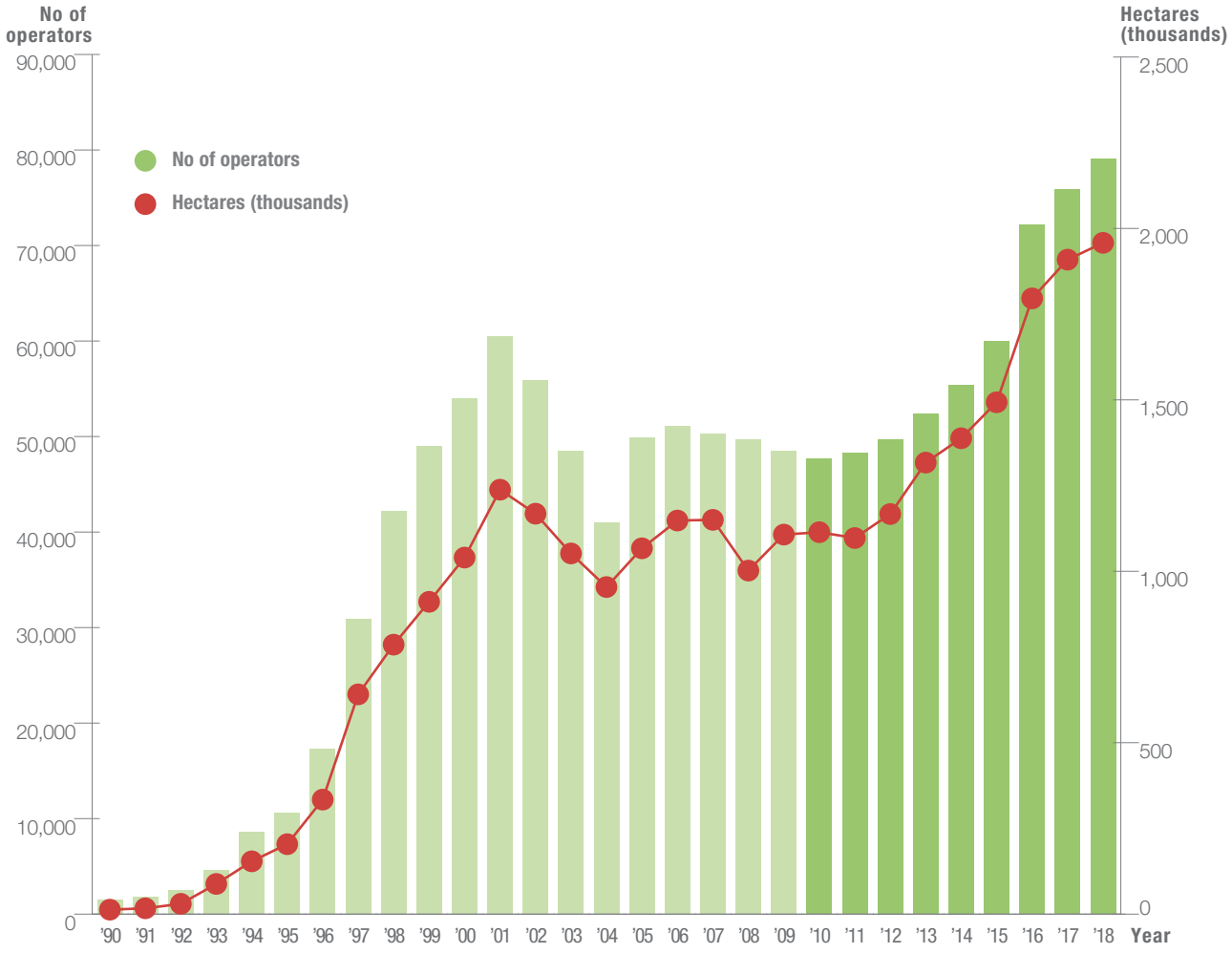
Source: Compiled by SINAB based on data provided by Control Bodies, Regional Authorities and SIB

Chart 2
REGIONAL DISTRIBUTION OF ORGANIC OPERATORS BY CATEGORY IN ITALY
2017 AND 2018
NUMBER



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

Chart 3
ORGANIC AGRICULTURE IN ITALY: AREAS (ha) AND OPERATORS (No)
1990-2018
IN HECTARES AND NUMBER



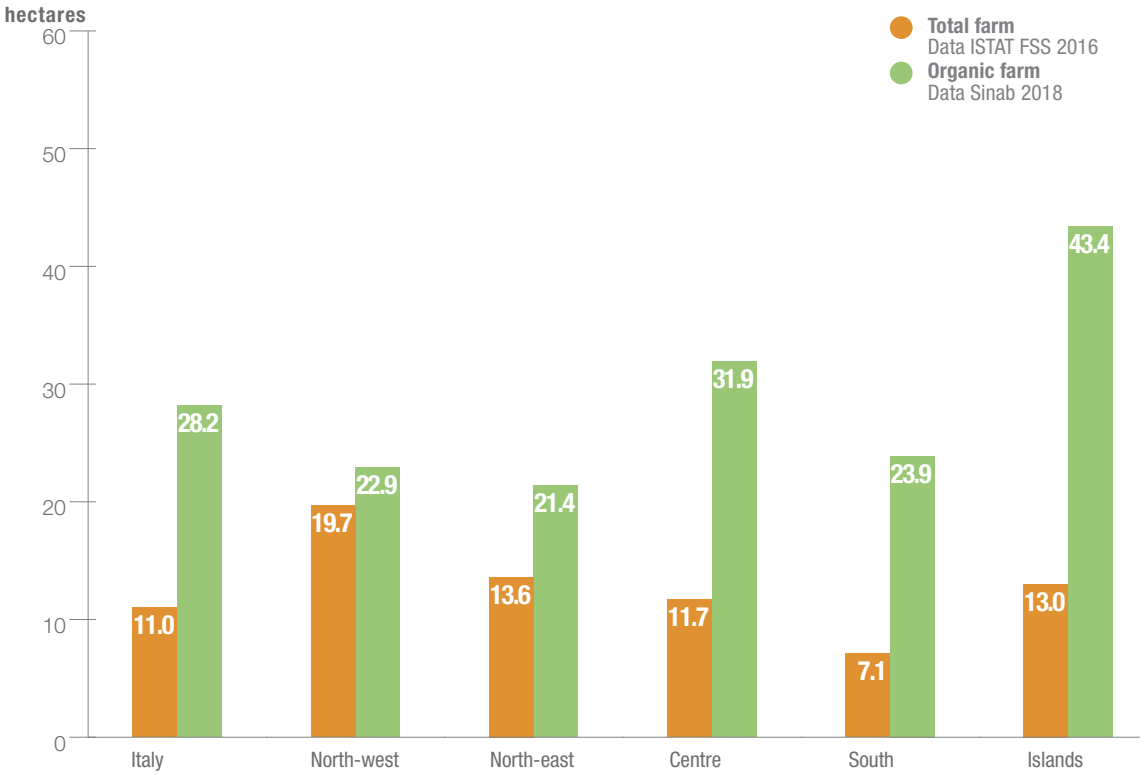
Source: Compiled by SINAB based on data provided by MiPAAF

Table 7
ORGANIC FARMING IN ITALY: SHARE OF AREAS AND OF FARMS BY GEOGRAPHICAL AREA ON NATIONAL TOTAL (ISTAT FSS 2016)
2018
% SHARE

	Share of organic areas %	Share of organic farms %
ITALY	**15.5**	**6.1**
North	**7.7**	**5.5**
North-west	5.6	4.8
Piedmont	5.3	5.0
Valle d'Aosta	6.4	3.4
Liguria	11.4	3.6
Lombardy	5.6	4.8
North-east	9.3	6.0
A.P. Bolzano	5.6	8.5
A.P. Trento	4.1	13.0
Veneto	4.9	3.3
Friuli-Venezia Giulia	7.1	4.4
Emilia-Romagna	14.4	8.0
Centre	**20.1**	**7.4**
Tuscany	20.9	10.0
Umbria	12.9	6.2
Marche	20.9	7.2
Latium	22.6	6.2
South	**20.1**	**6.0**
Abruzzo	10.7	4.0
Molise	5.8	2.1
Campania	14.4	6.3
Apulia	20.5	4.3
Basilicata	20.6	5.6
Calabria	35.1	10.8
Islands	**19.2**	**5.8**
Sicily	26.8	6.4
Sardinia	10.1	3.9

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

Chart 4
AVERAGE FARM SIZE BY GEOGRAPHICAL AREA
2018
IN HECTARES



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

Table 8
ORGANIC AQUACULTURE FARMS IN ITALY
2017 AND 2018
NUMBER

	2017	2018
ITALY	**39**	**53**
Emilia-Romagna	11	22
Veneto	15	19
Apulia	2	5
Calabria	1	1
Friuli-Venezia Giulia	2	1
Sardinia	1	1
Trentino-Alto Adige	1	1
Marche	1	1
Liguria	0	1
Sicily	0	1
Lombardy	2	0
Umbria	1	0
Campania	1	0
Latium	1	0

Source: Compiled by SINAB based on data provided by SIB

Table 9
ORGANIC LIVESTOCK IN ITALY
2017 AND 2018
NUMBER OF LIVE ANIMALS

	2016	2017	2018	2018/2017 % change
Bovine animals	331,431	336,278	**375,414**	11.6
Porcine animals	56,567	61,242	**59,623**	-2.6
Ovine animals	776,454	736,502	**680,369**	-7.6
Caprine animals	113,983	115,590	**110,055**	-4.8
Poultry	4,636,012	3,027,604	**3,482,435**	15.0
Equine animals	15,691	15,293	**12,982**	-15.1
Bees	170,343	171,094	**164,824**	-3.7

** No of apiaries*

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

MARKET
AND CONSUMPTION
FIGURES ON ORGANIC FARMING

Data
ISMEA
Istituto di Servizi per il Mercato Agricolo Alimentare

Source
ISMEA and Nielsen

Compiled by
ISMEA
Antonella Giuliano
Riccardo Meo
Marilena Perrone
Giulia Rapicetta

ORGANICS IN THE FOOD DEPARTMENT

In 2019, there has been much debate about environmental sustainability and relevant actions that should be implemented in our societies. Outstanding among the many tools identified by the United Nations to promote sustainable development goals, is organic food production which, once again this year, has proven its worth in Italy from an economic point of view.

ISMEA leads the way in monitoring and studying organic market trends in Italy through collection and analysis of statistical data, regularly published on the SINAB website. The *Bio in Cifre* report which has been published annually since 2000, as well as the SINAB database, provide a very important tool both for the community and for researchers and operators in the sector who want to keep up to date with organic trends in Italy.

The 19th edition of *Bio in Cifre* focuses on two important new features regarding consumption of organic produce in Italy: the overall share of the sector's sales in Italian agri-food spending which, for the first time, exceeds a 4% threshold; and the inclusion, in consumption analysis, of fresh unpackaged products (weight not imposed) which, until a few years ago, were underrepresented, especially in large-scale retail trade.

The organization of retail outlets, driven by growing consumer demand and increased efficiency in logistics, allows, today, to find more easily even bulk products on the shelves or in dedicated food sections.

ISMEA closely monitors this market component by analysing data provided by a large consumer panel identified by Nielsen, which reports monthly on their purchase choice: expenditure on organic fruit and vegetables and variable-weight cheese is estimated to reach almost 800 million euros in 2019.

If we take into account the whole organic produce, the turnover estimates for 2019 amount to more than 3.2 billion euros[3]. A figure which, when compared to the previous year, considering the same purchase variables and the same reference period, indicates that overall the sector is stable although some differences can be pointed out within product categories.

Basically, consumption figures, reported in detail in the following sections, reflect the rise of a sector whose turnover is now significant, and which seeks further growth opportunities like e-commerce or starred restaurants.

Indeed, the sector's vibrancy and the interest of the Italian consumer, and more and more that of foreign consumers too, are all factors that cannot be overlooked as also confirmed by the increasing number of trade fairs and themed events across the country for consumers or buyers alike.

[3]Estimates updated as of 03 November 2019

Main categories in organic spend

Worldwide, organic consumption continues to grow steadily.

In line with the global trend, in Italy, too, consumers who appreciate organics, and change their preferences towards this type of product, are on the rise. In particular, products that cannot be missed by organic consumers are without doubt the so-called “fresh and very fresh” items that, together, account for two thirds of the whole sector.

This category includes products which an increasing number of consumers cannot live without, especially because they are part of a healthy and wholesome diet[4].

As mentioned earlier this report also takes into account bulk products sold in the large-scale retail trade where, above all in fruit and vegetable departments, self-service organic areas are growing, and are now viewed by consumers as inexpensive and affordable purchase points.

Based on these findings and on the analysis of each sector **(Chart 5)**, it is clear that, this year again, fruit and vegetables, on top of consumers' preferences, play an important role, accounting for 47% of all organic food expenditure.

Chart 6 shows that only very few sectors had a negative trend in 2019. These include fruit and vegetables, dairy and beer.

In 2019, the **fruit** sector recorded a **-2.7%** drop in turnover **(Chart 6)**, partly ascribable to the unfavourable growing season that had a negative impact on some valuable crops. An example is the case of pears, organic and not, whose production has been severely damaged by adverse weather conditions and, above all, by the devastating spread of the Asian bug.

Similarly, **vegetables** suffered a **-1.5%** downturn, particularly in the less-organised sales channels which, owing to the lower volumes sold, were more affected by product shortages and higher purchase prices, leading to a sharp drop in turnover.

Another negative figure is that of the **dairy** sector (20.5% of organic spending, with a 5.9% incidence on agri-foodstuffs), which shows a downward trend compared to 2018, with a **-1.9%** decrease.

However, this figure should be analysed in greater detail considering that the performance of each product in the category is quite different: in fact, consumption of fresh milk increased in the large-scale retail market (+2.4% in value and +3.3% in quantity), also due to a price fall (-0.9%). On the other hand, yogurt, which accounted for 37% of the industry's sales, was down 2.3%, despite an average price decrease (-0.8%) that should have boosted purchases by a larger number of consumers.

On the other hand, cheese showed the opposite trend, with an overall excellent performance (+9.3% in spending and +3.3% in volume); within this segment, it is worth mentioning fresh cheese, which displayed an increase of 10.2% in value and 7.0% in volume, despite a +3.0% price increase. The organic cheese segment, which is currently stable at 8.2%, is expected to have a substantial growth in the near future.

As regards **cereal products**, further growth **(+1.4%)** was recorded in 2018 with the persistent rise in breakfast cereals, which, once again, grew significantly (+7.4% in value and +9.5% in

[4]AA.VV.,”Linee Guida Per Una Sana Alimentazione”, CREA Centro di Ricerca Alimenti e Nutrizione, 2018.

quantity), as promotional campaigns were launched with an average purchase price that fell by -1.9%. The new food trends also favour bread substitutes, which are rising both in spending (+4.9%) and in quantity (+4.1%), while prices remain the same (+0.7%).

Another sector with a positive trend is that of organic **eggs**. The low price in absolute terms as well as the low difference in purchase price between organic and conventional (on average 0.2 euro cents) and the message conveyed about farming sustainability and free-range poultry farming make this product appreciated from Northern to Southern Italy, with a further **+10.8%** increase in sales and a 15% share on the whole sector.

The **vegetable oils and fats** sector saw a 5.6% increase in expenditure. Extra-virgin olive oil, the main ingredient of the Mediterranean diet and leader of the category (88% of the value) recorded a price drop (-5.7%) in large-scale retail trade leading to a 10.4% increase in sales volumes. A trend in clear contrast with the Italian offer which, throughout 2019, was affected by the effects of the poor 2018 production season. Consumption data thus shows how the market can adapt in order to meet dynamically consumer demand.

The incidence of organic **meat** on Italian consumption remains low (0.7% of organic spending) but the trend has been growing for some years now **(+13.1%)**, driven by sales of poultry meat. The consumption of certified red meat is hardly representative and tends to be stable, but still with an encouraging +0.8% after poor performance in the first semester of 2019.

Recently, some analysts have identified an inverse relationship between organic fruit and vegetable consumers and organic meat consumers; basically, people who consume heavily organic fruit and vegetables tend not to eat meat or eat meat moderately. The opposite is also true.

Besides, in recent years, environmental and animal welfare groups have put much effort in raising awareness and disseminating information about conditions in conventional intensive livestock farming which are often controversial. The growing need to consume healthy food, combined with the rising concern in Italy about animal welfare[5], have undoubtedly contributed to a more flexible consumer indifference curve favouring organic products.

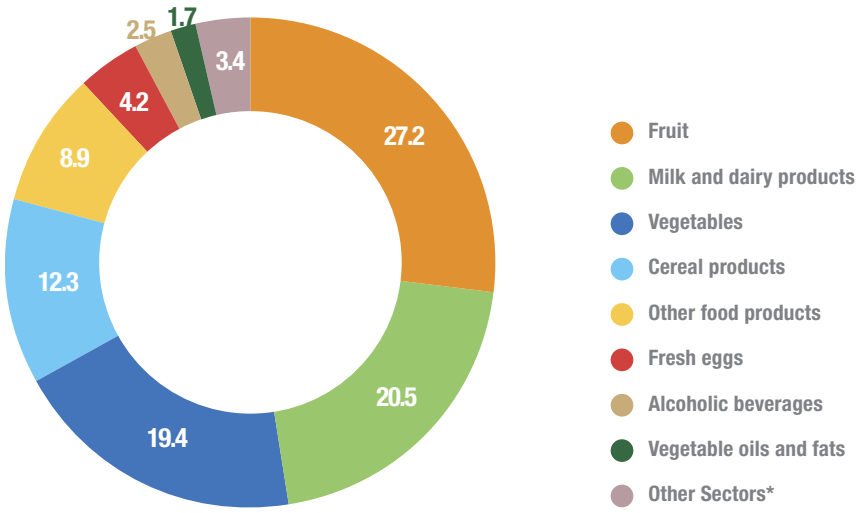
Among all the sectors reviewed, organic **beer** declined most significantly; in 2019 it dropped by **-22%** from a positive growth rate in 2018. This result is probably due to a greater supply of craft beers that allow consumers to choose between local craft brewing, often organic but not certified, and organic beers.

Finally, one of the most representative sectors still under scrutiny by the industry's analysts: organic **wines and sparkling wines**, which again show a double-digit growth rate **(+30.9%)**, although slightly lower than in 2018, and are increasingly appreciated and in demand on the shelf. The low incidence both on Italian organic food turnover (1.2%) and on the total wine purchased by consumers in Italy (1.4%) certainly does not reflect a sector that mainly focuses on restaurants and food service.

It is worth noting that, despite the economic slowdown highlighted by the latest ISTAT data, consumption figures for the Italian agri-food industry (+2.0%) remain more stable than for other sectors. The organic sector is still performing well, but mostly in the Modern Retail Trade (+5.0%), while the total household consumption, also including on-trade (HORECA) and public canteens, is still in line with last year's figures.

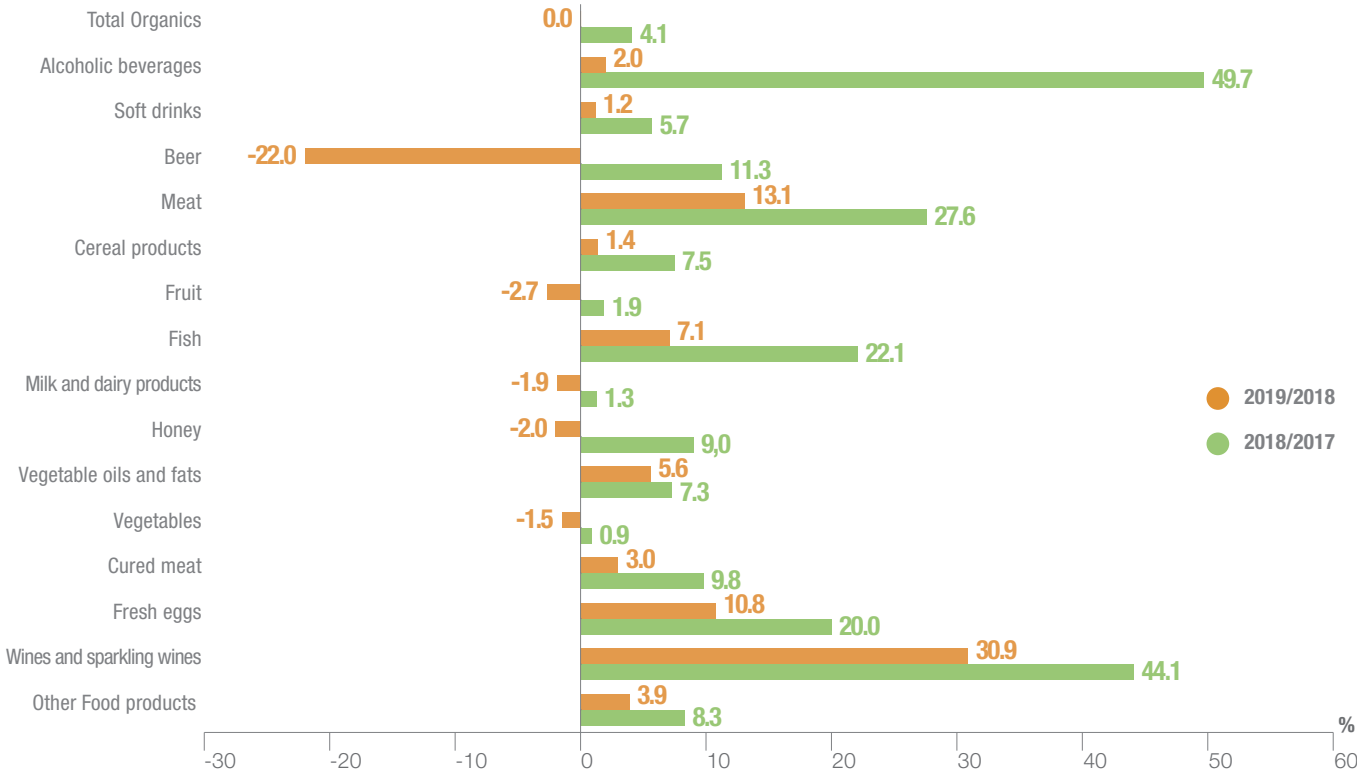
[5]This statement is based on figures relating to the emerging "pet economy"; in 2018 the sector grew by 1.5% worldwide. In the same period, in Italy the sector expanded by 3.8% and the number of pet owners rose by 23.7%.

Chart 5
BREAKDOWN OF ORGANIC SPEND BY SECTOR
2019
% SHARE



**Other Sectors Include: Meat, Fish, Honey, Cured Meats, Beer, Wines and Sparkling Wines and Other Alcoholic Beverages*
Source: Compiled by ISMEA based on data provided by Nielsen

Chart 6
ORGANIC SPENDING TREND
2019/2018 AND 2018/2017
% CHANGE



Source: Compiled by ISMEA based on data provided by Nielsen

Table 10
SPENDING TREND: ORGANICS TO TOTAL AGRI-FOOD PRODUCTS
2019/2018
% CHANGE

	2019/2018 % Change Organic		Agri-food	
TOTAL	**+0.0%**		**+2.0%**	
Fresh meat	+13.1%	▲	-0.4%	▼
Cereal products	+1.4%	▲	+0.6%	▲
Fruit	-2.7%	▼	-2.4%	▼
Milk and dairy products	-1.9%	▼	-0.4%	▼
Vegetable oils and fats	+5.6%	▲	-8.6%	▼
Vegetables	-1.5%	▼	+2.5%	▲
Eggs	+10.8%	▲	+0.8%	▲
Cured meat	+3.0%	▲	+1.1%	▲
Wines and sparkling wines	+30.9%	▲	+3.4%	▲

Source: Compiled by ISMEA based on data provided by Nielsen

Geographical distribution

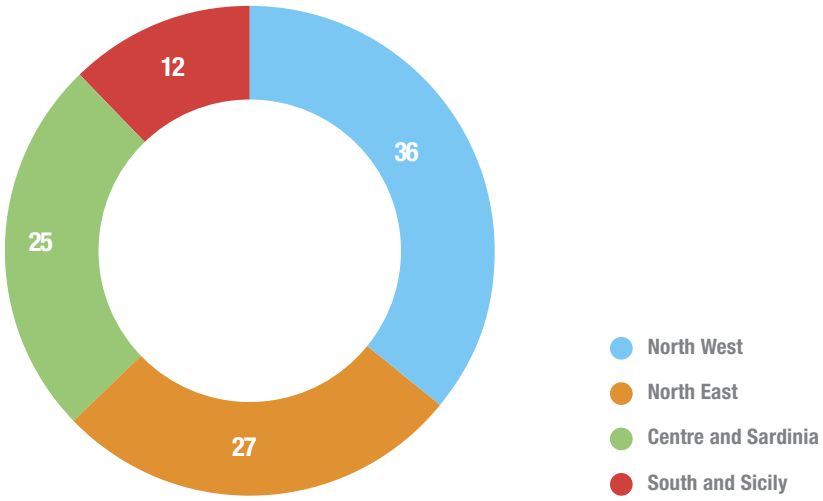
The geographical distribution of organic spending across the country is not surprising **(Chart 7)**.

Estimates for 2019 confirm that Northern Italy is leading the way with over 60% of consumption, even though the South is quite dynamic; Regions in the Centre report a +7.1% increase in spending, while the South and Sicily are up by +4.9% **(Chart 8)**. However, there is still a gap to fill regarding consumption levels, which total now only 12%. However, the current situation is encouraging in the South where, despite a consumer's purchasing power lower than the Italian average, retailers are increasingly offering a wide range of organic products, following a change in consumer habits.

This positive trend can also be explained by a greater employment rate in all regions of the South in 2019[6]: higher employment resulted in increased purchasing power.

[6]Source: BD ISTAT Regional employment rate

Chart 7
DISTRIBUTION OF ORGANIC SALES IN LARGE-SCALE RETAIL TRADE BY GEOGRAPHICAL AREA
2019
% SHARE

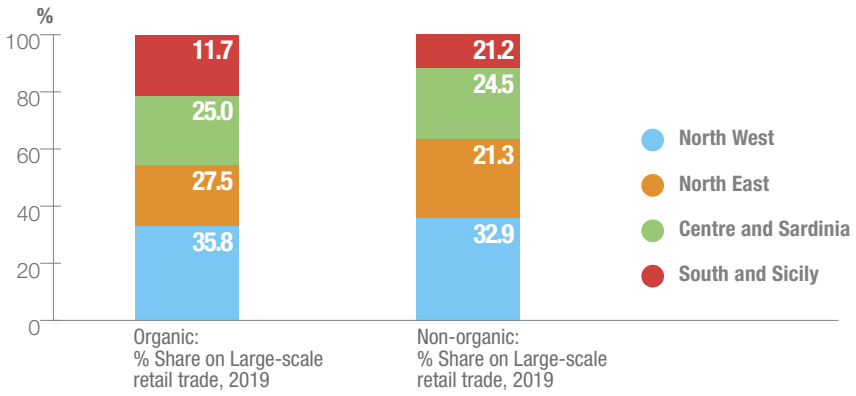


Source: Compiled by ISMEA based on data provided by Nielsen

Chart 8
GEOGRAPHICAL DISTRIBUTION AND ORGANIC SPENDING TREND FOR FIXED-WEIGHT PRODUCTS IN LARGE-SCALE RETAIL TRADE
2019/2018
% CHANGE

Source: Compiled by ISMEA based on data provided by Nielsen

Chart 9
GEOGRAPHICAL DISTRIBUTION OF ORGANIC SALES IN LARGE-SCALE RETAIL TRADE AND COMPARISON WITH AGRI-FOOD PRODUCTS
2019
% SHARE



Source: Compiled by ISMEA based on data provided by Nielsen

Sales channels

In 2019 organic products were available in all types of retail outlets, ranging from large-scale trade to small grocery stores. Organics are sought after by consumers and the offer is adapting rather quickly. Large-scale retailing is undoubtedly the channel that best meets this need and has developed successful marketing campaigns and sales techniques. For 2019, therefore, consumption distribution data confirms that **modern channels** are the main channel for the sale of organic products.

In 2019, spending through this channel accounted for 67.5% of the total **(Chart 10)**, a further **5.0%** increase over the previous year. Based on this figure, the growth rate is expected to rise further in 2020. In fact, looking at data on expenditure in each sector, it is clear that modern channels trade has achieved positive results in all product categories, proving that promotional campaigns on organic products were very successful.

Discount grew more than the other large-scale retails sales outlets **(+13.6%)**, channelling 8.9% of organic food spending in Italy.

This is the result of a new commercial strategy implemented in recent times which, while aiming at higher quality and a wider range of fresh and very fresh products, adopts an imperative of the lowest price and promotional offer, which very often is also a winning choice to attract organic consumers.

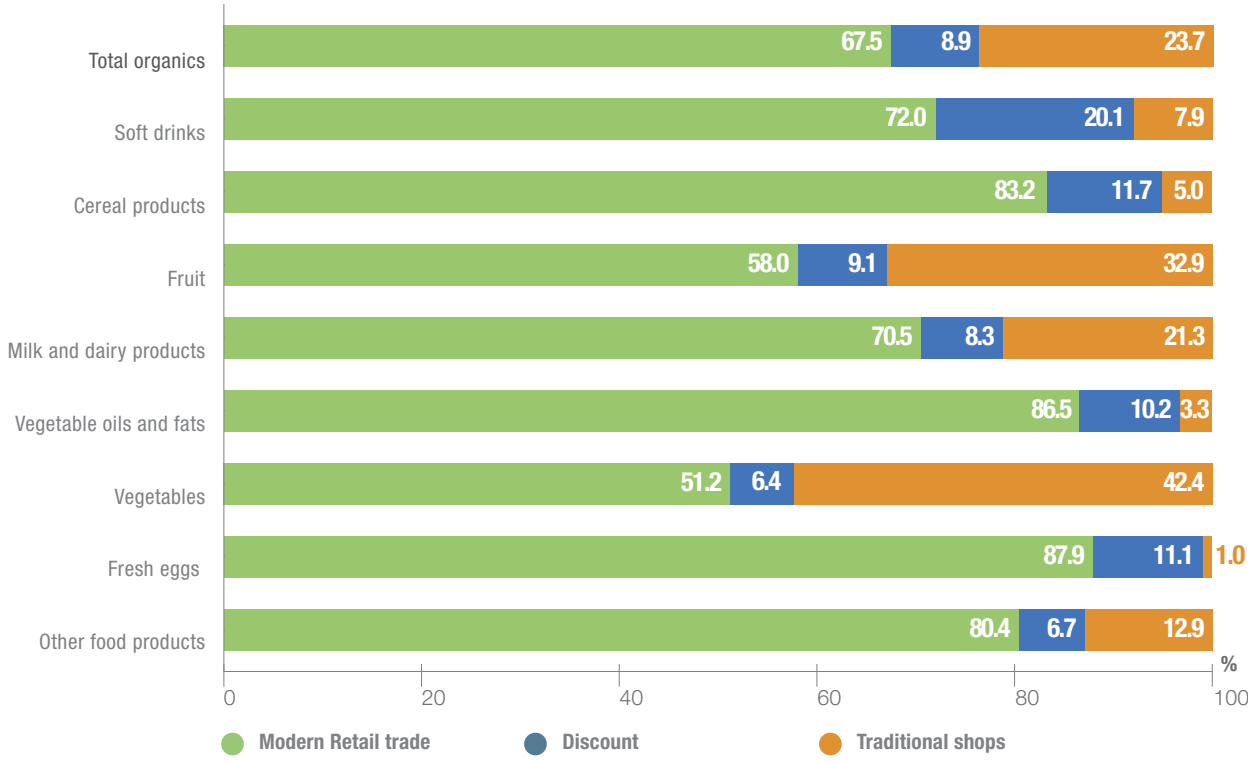
Final data, also in 2019, show that **traditional shops** are still struggling, as they registered a **-9.3%** decrease. The sector of retailed chains that suffer the most from large-scale retail competition are those with the highest share of organic production.

More specifically, fruit and vegetables lost 10.3% and 8.4% of turnover respectively,

mainly due to the entry into the large-scale retail trade of certified products belonging to these categories, often sold at lower average unit prices.

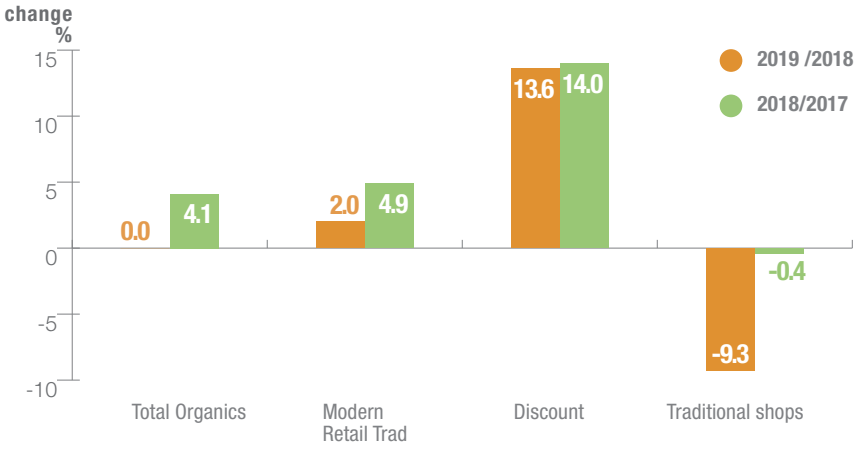
Lastly, when analysing consumption by age group, it appears that most sales were generated by the over-64s, while the under-34 recorded the largest increase in spending, with +4.1% **(Chart 14)**.

Chart 10
BREAKDOWN OF ORGANIC PRODUCTS BY SALES CHANNELS
2019
% SHARE



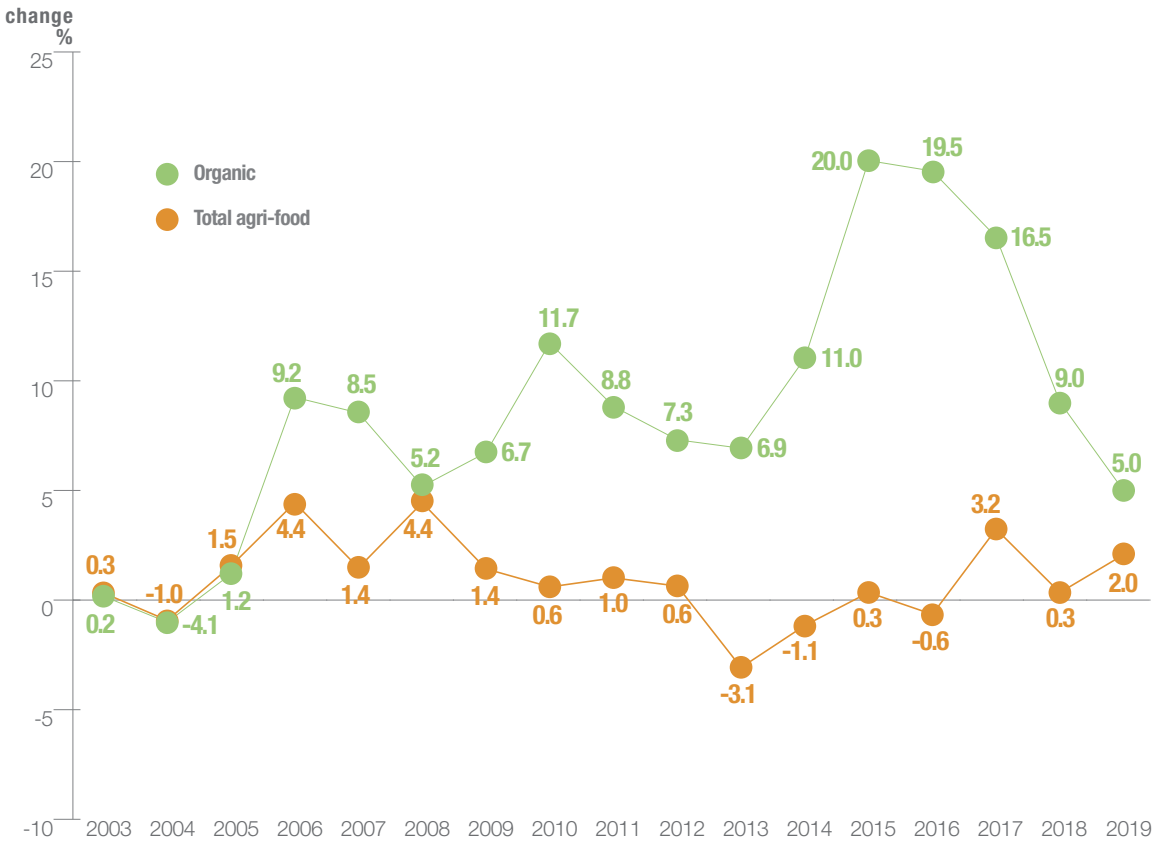
Source: Compiled by ISMEA based on data provided by Nielsen

Chart 11
SALES CHANNELS: COMPARISON OF CHANGE IN TURNOVER 2019/2018 AND 2018/2017 % CHANGE



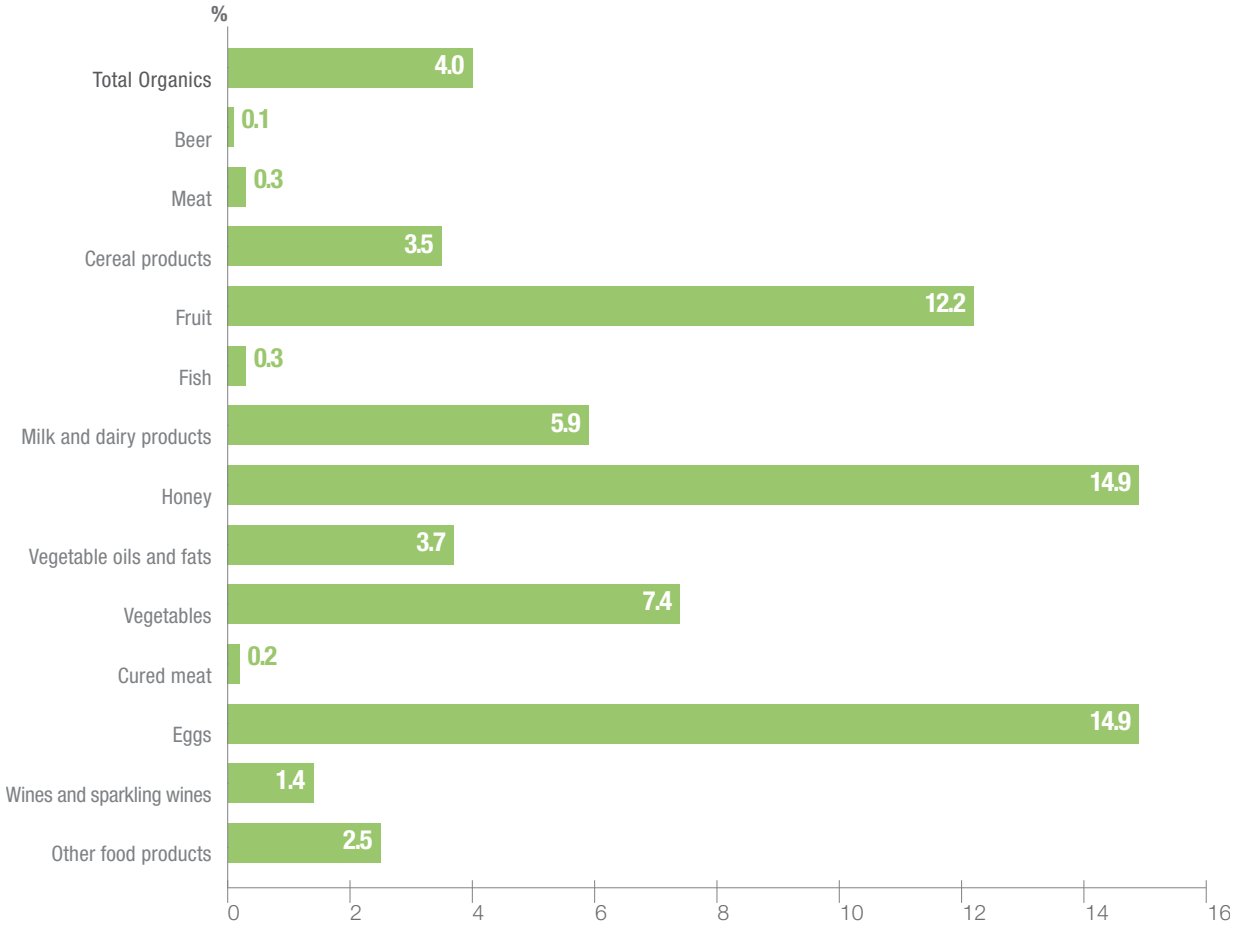
Source: Compiled by ISMEA based on data provided by Nielsen

Chart 12
TIME SERIES OF ORGANIC CONSUMPTION IN LARGE-SCALE RETAIL TRADE COMPARED TO TOTAL AGRI-FOOD TREND 2003-2019 % CHANGE



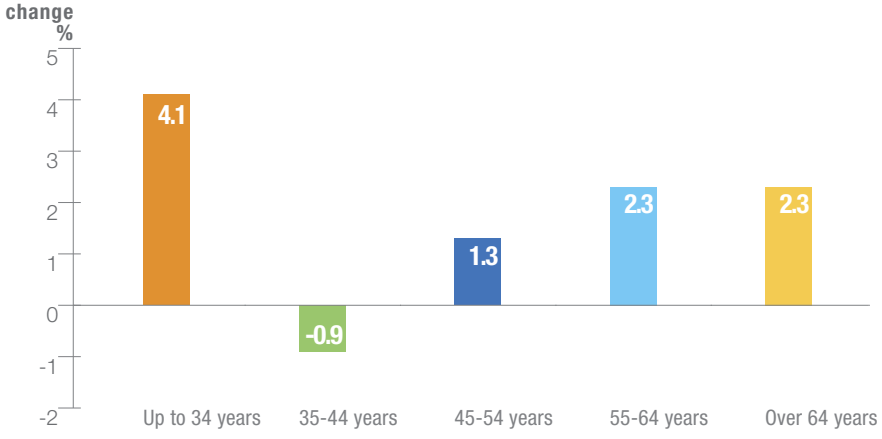
Source: Compiled by ISMEA based on data provided by Nielsen and ISMEA-GFK Eurisko Panel

Chart 13
SHARE OF ORGANIC SPEND IN AGRI-FOOD PRODUCTS
2019
% SHARE



Source: Compiled by ISMEA based on data provided by Nielsen

Chart 14
ORGANIC SPENDING TREND BY AGE OF PURCHASER
2019/2018
% CHANGE



Source: Compiled by ISMEA based on data provided by Nielsen

ORGANIC PRODUCTS PRICES

Producer prices for organic products

For a long time, there has been much concern in the agricultural sector as to how to set and guarantee a fair price to farmers for their produce.

In the last twenty years, organic farming has faced technical and regulatory issues and developed a professional and modern commercial system, also thanks to its growth potential and achievements in the consumer market.

The sector's trends are well-known and reflect the business capacity of the actors in the supply chain.

The goals defined by national and European organic policies for the coming years are ambitious and aim to expand more the use of this production method.

At the same time, a new awareness among young entrepreneurs and across the population as well, will contribute to boosting the supply of certified products.

In this scenario a new challenge is currently facing the sector: in this managing to organise and regulate production at best so as to overcome the main problem affecting the conventional agri-food industry: production profitability, which has already raised some concerns in the organic sector, but could become a real problem as the volume of certified products increases. Market rules seem inflexible in a globalized trading system based on price regulation, and international trade agreements that seek to reduce domestic price support measures.

Nevertheless, a number of tools are available which must be applied now, building on both the experience gained in the agricultural sector in general and on ongoing efforts to develop future agricultural policy measures allowing new forms of aid to the sector.

In this regard, supply chain contracts must certainly be developed and supported. While they allow the processing industry to plan production in the best possible way, they also enable farmers to get guarantees on price and, if necessary, rely upon a network system, when their produce is not properly valued.

Instead, downstream of the market, further efforts need to be made to inform and raise consumer awareness. There are many well established Community and national campaigns aiming to raise awareness and promote organic agricultural products, including through support to rural development measures. However, failure to involve certain categories of the population living mainly in peri-urban areas or, paradoxically, also in rural areas, has been emphasised. Schools are

probably still the best place to train tomorrow's consumers, who can indirectly influence their families' purchase choices in the short run.

The aim is therefore to prevent low prices becoming the norm, as has been the case in the conventional sector, by making choices that do not reward the system's quality and efficiency, but, instead, might favour imports from areas where production and social conditions and the related costs are different.

In the *Bio in Cifre* report, the price trend of some organic products is analysed and compared with the corresponding value for conventional products in order to monitor over time the price difference granted to farmers.

The list is not exhaustive, but a comparative analysis for the four-year reference period shows what has already been described earlier: producer prices for organic products are higher than those for conventional products, although with a few exceptions, in particular for fruit and vegetables. If we consider the usual basket of 14 products and look for an approximate reference of the value added by organic products to the final price in the four-year period, on average the positive gap to consider is 60%.

It should be pointed out, however, that in arable crops the difference is, on average, higher but has fallen sharply in recent years, with prices paid to organic farmers gradually lower and lower, while in fruit and vegetables the opposite seems to occur. Apart from apples, the difference in producer prices between conventional and organic is lower but prices seem to be growing faster.

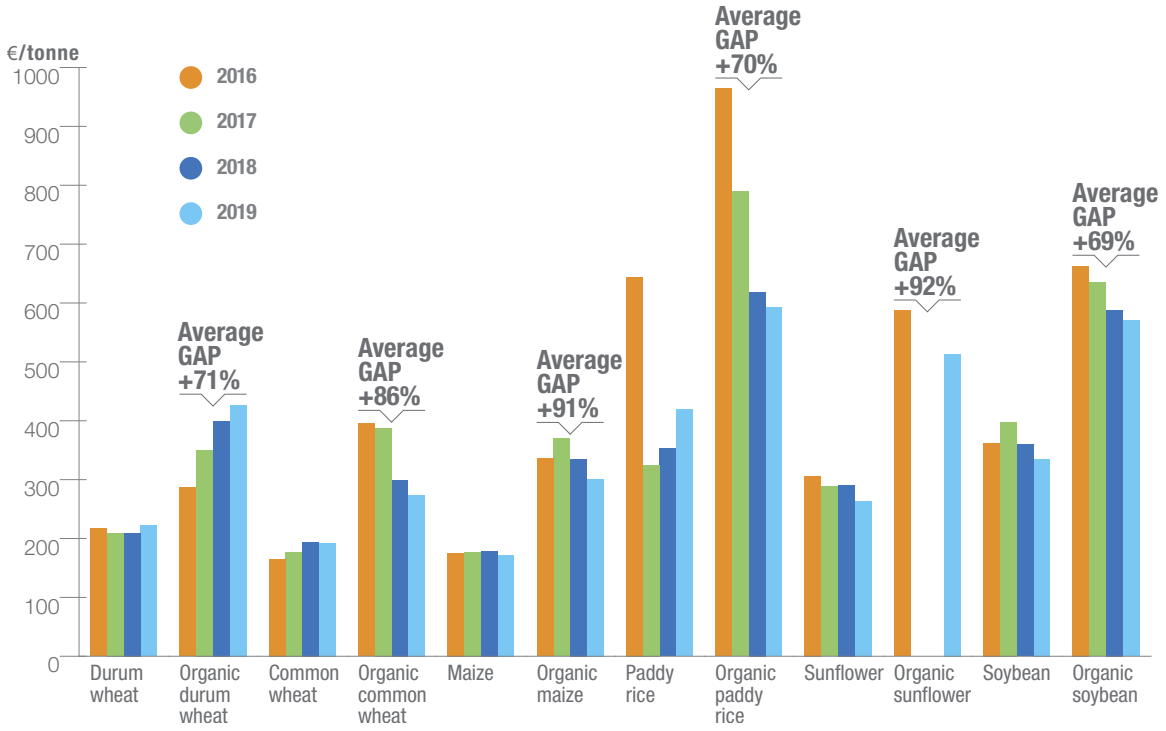
Aiming to increase transparency and provide useful information also to the business world, the Dimecobio project collects and publishes producer prices for organic products, which can be consulted in the dedicated section of the website http://www.sinab.it/.

Chart 15

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

2016-2019

€/TONNE



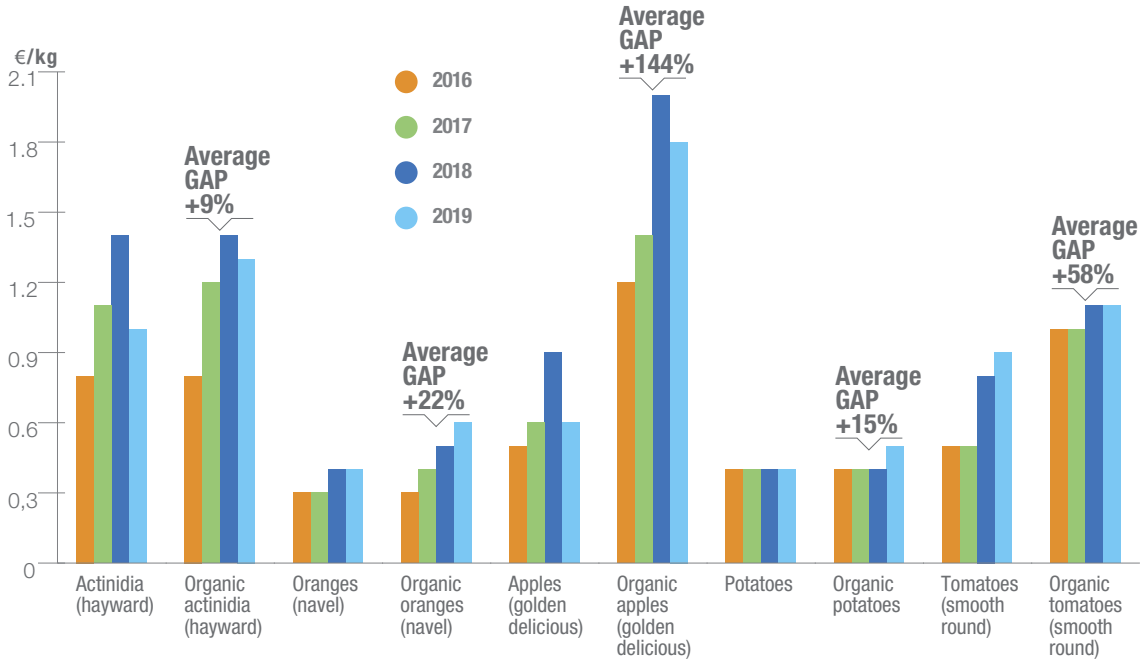
Source: Ismea Price Survey Network

Chart 16

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

2016-2019

€/KG



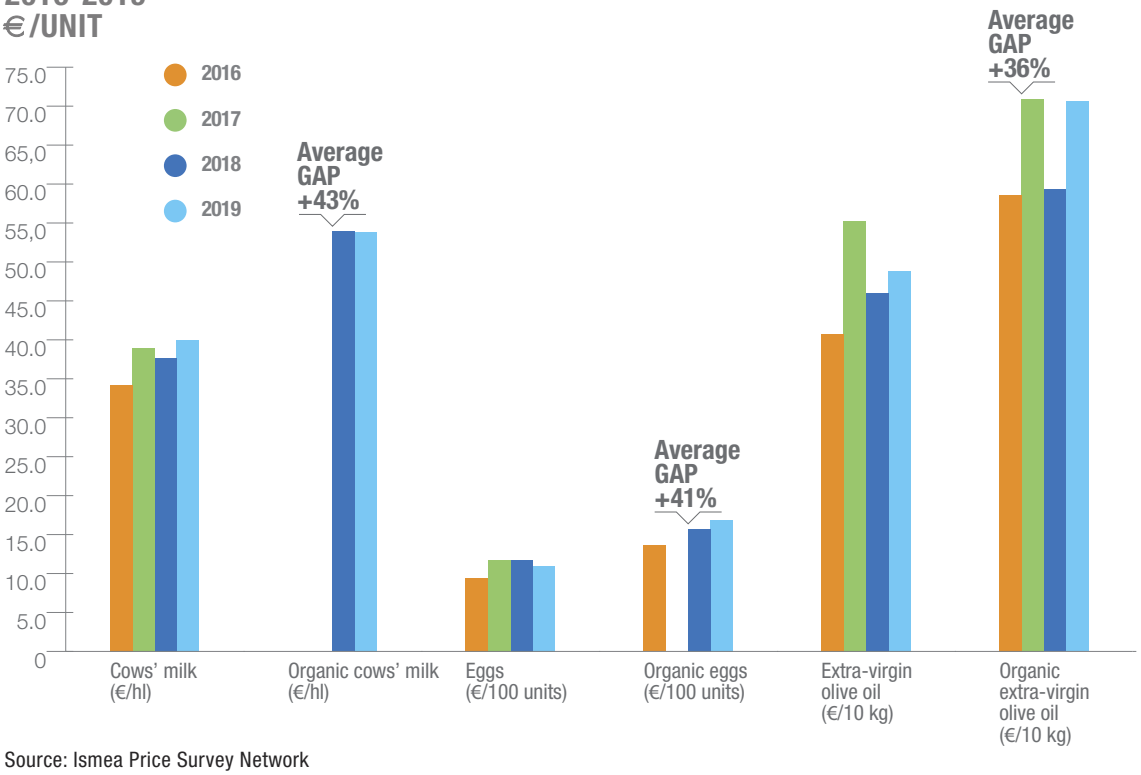
Source: Ismea Price Survey Network

Chart 17

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

2016-2019

€/UNIT



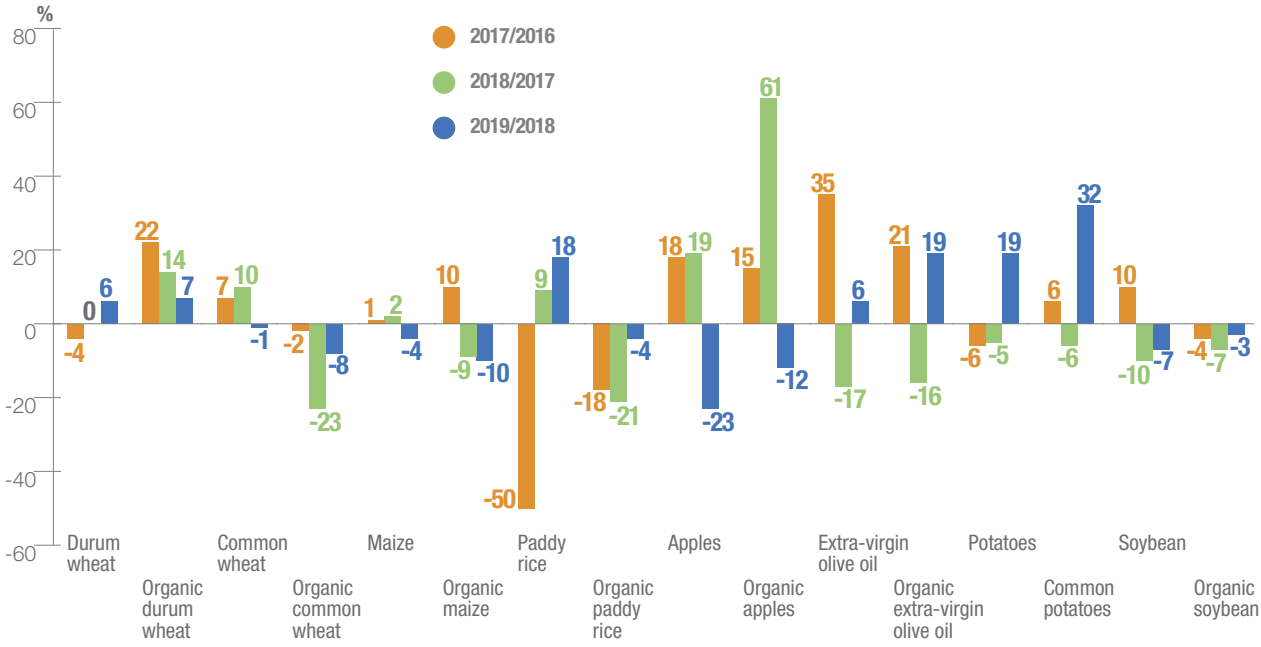
Source: Ismea Price Survey Network

Chart 18

PRODUCER PRICE DYNAMICS FOR SOME ORGANIC PRODUCTS AND THEIR CONVENTIONAL COUNTERPARTS

2016-2019

% CHANGE OVER THE PREVIOUS YEAR



Source: Ismea Price Survey Network

Consumer price

Consumer prices of the main organic products generally declined in 2019.

Average price reduction is certainly well accepted as it favours democratisation and wider spread of certified products among consumers.

The current state of play may be explained by several factors:

- higher product supply in retail outlets;
- increasing number of organic farms;
- technology development and innovation in the sector;
- insurance schemes which, although not yet in full force, are starting to address the needs of organic farmers;
- public support measures focusing on both rural development measures and Common Market Organisation (CMOs) measures;
- easier supply of organic products to the industry;
- lower distribution costs for retailers who, in addition to selling, also deliver more organic products per year;
- the growing number of "private labels" (private label products) with both dedicated and cheaper premium lines.

Short-term expectations, supported by both EU and national policies outlined for post-2020, suggest that this situation will remain unchanged in the medium run.

In fact, more resources will be put in place to promote quality products and all measures that can help organic farmers to improve their competitiveness both by increasing process efficiency and by bringing innovation to the farm in order to lower costs and reduce production losses.

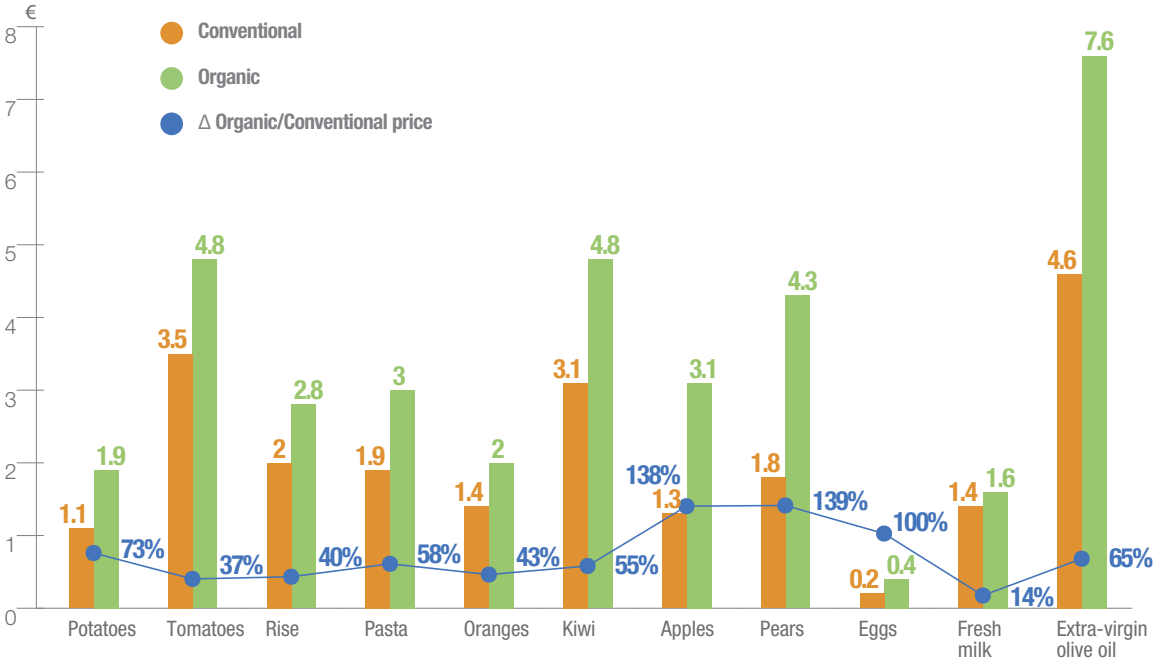
However, sector stakeholders and public authorities have to keep on monitoring. For each food product all players in the value chain have a stake in increasing their economic profitability.

This is a basic approach to the rules of the market, which, however, in the agricultural sector has traditionally favoured the industry. The industry has always interacted as a single actor with an array of producers who were unable to value their work.

As indicated by data on consumer prices for some organic products **(Chart 19)**, the price difference with non-certified counterparts is on average 62%, in line with the discrepancy in producer prices. Although this difference does not concern all products, it must be maintained in the future if the organic sector is to continue to grow.

Chart 19

CONSUMER PRICE OF SOME OF THE MAIN ORGANIC PRODUCTS AND THEIR CONVENTIONAL COUNTERPARTS
2019
IN EUROS AND % CHANGE

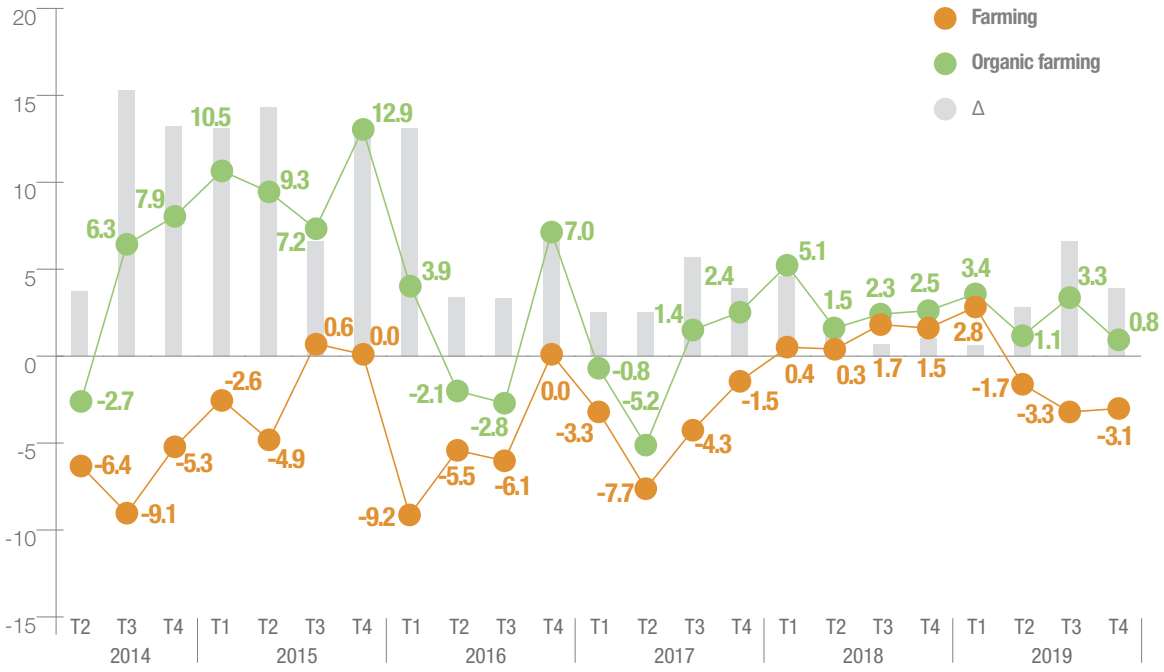


Source: Compiled by Ismea based on data provided by Nielsen

CONFIDENCE CLIMATE

Farmers' Confidence Index **(Chart 20)**, calculated by Ismea, is a useful indicator that allows comparing over time the "sentiment" of organic and non-organic farmers interviewed about their present and future economic situation and their mid-term prospects. It is based on the answers given by a sample of 800 farmers to two questions: the first concerning their business performance and the second on the economic expectations for the years ahead. The index is calculated on a scale ranging from -100 to +100; the highest value is reached when all re-

Chart 20
FARMERS' CONFIDENCE INDEX[7]
2019



Source: Ismea Panel on Agricultural holdings

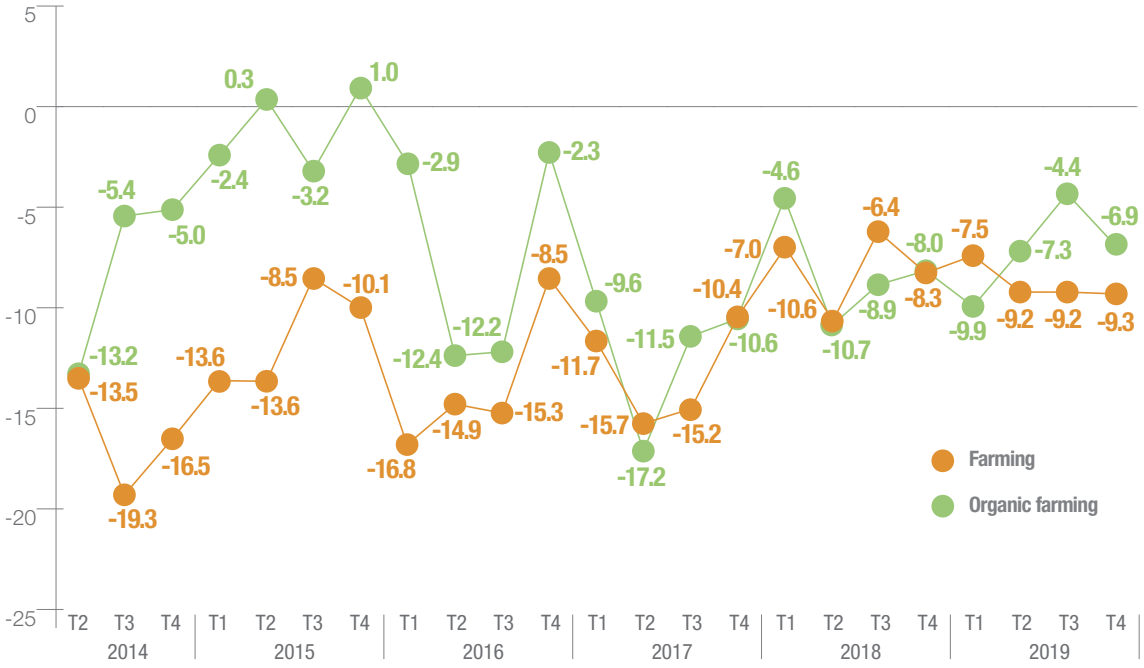
[7]Data reported in the charts are the balance between answer percentage shares (Positive answer share - Negative answer share)

spondents express a positive opinion on their business performance and future prospects. Values below zero, on the other hand, highlight the predominance of negative opinions about one' s own business performance.

What was described in 2018 has not occurred again this year. The confidence gap between organic and conventional farming, resulting from self-assessment of business performance, is widening again. In 2019 this gap averaged 3.5 units, meaning that in the same sample of 100 organic farms and as many conventional agricultural holdings, there are approximately a further 3 optimistic organic farms. An even wider divide in 2014 and 2015, which in 2016 and 2017 turned out to be very variable and started to raise concern last year, when as a result of a slow-down in organic farming and a clear business performance improvement of non-certified farms, the two trend lines overlapped.

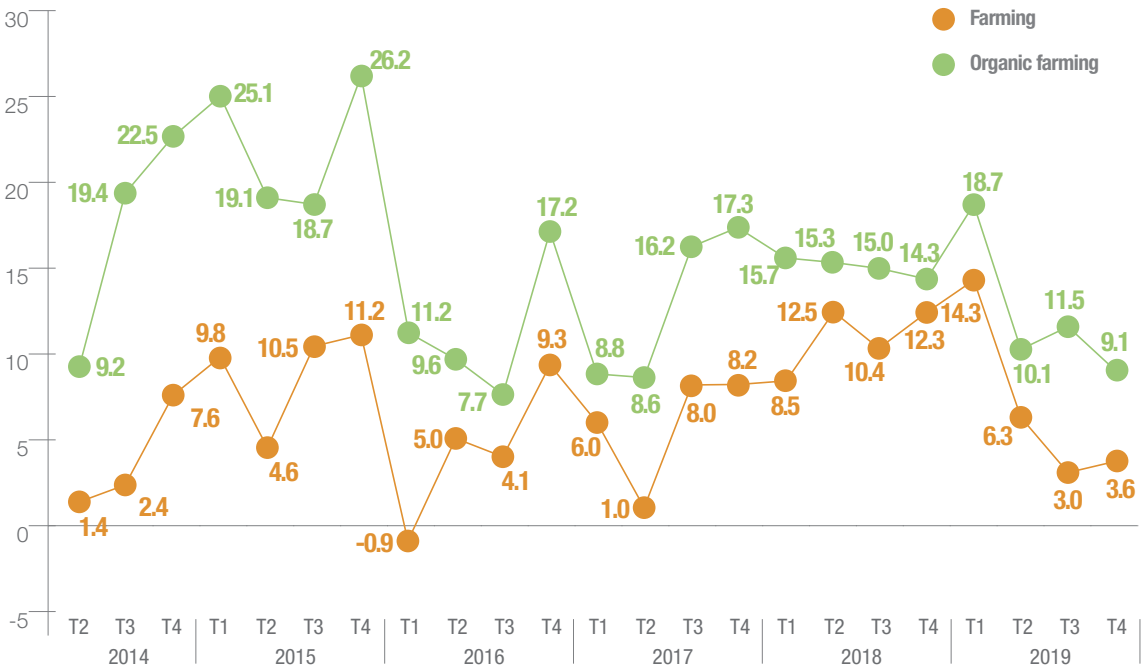
Therefore, this year organic farming stands out by comparison not for a substantial improvement in business conditions but rather for the worsening conditions in the conventional sector.

Chart 21
HOLDING'S CURRENT BUSINESS PERFORMANCE
2019



Source: Ismea Panel on Agricultural holdings

Chart 22
EXPECTATIONS ON FUTRE BUSINESS PERFORMANCE
2019



Source: Ismea Panel on Agricultural holdings

Confidence climate is determined by analysing farmers' answers about their current and future business trends.

In general, farmers who continue holding out confidence and growth expectations about their future prevail, although they may express a predominantly negative opinion in self-assessment of their current economic condition.

The reasons differ among the farmers but can, in most cases, be explained by market volatility, too low product prices and growing uncertainties caused by increasingly frequent production problems related to extreme and unexpected weather events or outbreaks of plant diseases and spread of insect pests.

IMPORTS
FROM THIRD COUNTRIES
FIGURES ON ORGANIC FARMING

Data
MiPAAF
Ministry of Agriculture, Food and Forestry Policies

Source
SIB - Organic Information System

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

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

Import of organic products from third countries is regulated by Regulation (EC) No 834/07, Regulation (EC) No 889/08 and Regulation (EC) No 1235/08. These regulations stipulate that import of organic products from third countries can take place in two different ways:

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

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

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

From March 2018, notifications of incoming goods must be made exclusively through the "Import Communication Management" form on the **SIB (Organic Information System)** provided by MiPAAF. In this first year of transition towards an information system, in order to ensure high data quality regarding the amount of organic product imports, SINAB has been carrying out further consistency and data quality checks, also using the **TRACES (TRAde Control and Expert System)** database. TRACES is the European Commission's online management tool for all administrative procedures related to intra-Community trade and import of animals and products from third countries within the European Community. In accordance with Reg. (EC) 1235/2008, as amended by Reg. (EU) n. 2016/1842, since 19 October 2017, also imports of organic products from third countries into the EU have been managed through the TRACES platform. Therefore, access to the TRACES database makes it possible to acquire information from the authorization certificates of all consignments of products imported or potentially imported from countries outside the EU (certificates of inspection).

As of 31 December 2018, there were 472 companies on the national list of importers of organic products from third countries. Data relating to the volumes of products declared by these companies themselves have been classified according to the TARIC[8] (Integrated Tariff of the European Communities) customs tariffs, as reported by the operators in their written notification. TARIC is based on the Combined Nomenclature (CN), whose subheadings (identified by an 8 digit code number) represent the basic nomenclature for the Common Customs Tariff as well as for the statistics relating to the external trade of the Community and to trade between Member States.

All data presented were compiled by SINAB - a project of the Italian Ministry of Agricultural,

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

Food and Forestry policies (MiPAAF) managed by ISMEA and CIHEAM Bari – based on the records as of 31 December 2018, notified by Organic importers to the Organic Information System.

Import of organic products from third countries – analysis of data as of 31 december 2018

In 2018, imports of organic products from third countries to Italy include **cereals** (durum wheat, common wheat, maize, rice, other cereals) as the most imported product category with a share of **29.3%** in the total imported volume, followed by **fresh and dried fruit** with **19.7%**, while **industrial crops** only come in third place with **16.3%**.

Data on imports of organic products from third countries shows a substantial decrease in total volumes in 2018, equal to about **10.8%** compared to 2017. This negative trend was mainly driven by the category of **industrial products**, with a decrease of **50.3%** compared to 2017. The other product categories with substantial negative trends compared to 2017 are **processed products** with **-13.1%** and **vegetable oils and fats** with **-4.2%.**

The sharp drop in imports of industrial products is mainly due to a substantial decline in imports of sunflower seeds and soya meal, as a result of the slowdown of some large importers in the previous years and also because many Italian importers have moved towards products already available on the Italian or EU market. It should also be noted that, thanks to the concerted efforts of control bodies, MiPAAF and the Customs Agency, during selective inspections carried out in 2018, large amounts of product (in particular sunflower seeds and soya beans) found to be contaminated by active ingredients not allowed in organic farming were blocked, leading to the downgrading of the goods to conventional products.

The **cereal** categories as well as **vegetables and legumes**, instead, recorded a considerable increase in imported volumes, up to **13.4%** and **10.7%** respectively compared to 2017. The **coffee/cocoa/sugar** category showed a slight increase in volumes imported from third countries in 2018 **(+8.0%)**. On the other hand, **fruit** volumes were substantially unchanged compared with 2017 **(+2.8%).**

As far as **supply markets** are concerned, the situation in 2018 overall remained quite the same as in 2017, with a high prevalence of supplies from **Asia** (30.6% in volume) and **non-EU European countries** (26.1% in volume). However, the situation in these countries is very diverse, with **China** playing a particularly significant role in the import of industrial crops (soya beans and soybean meal) while, as far as rice is concerned, **Pakistan**, **India** and **Thailand** rank in order of importance for imported volumes. Among the non-EU European countries, **Turkey** stands out for the import of durum wheat and rice and **Ukraine** for maize.

Latin America continues to be a very important geographical area for Italian organic imports: overall, in 2018, **28.1%** of total volumes were imported from this geographical area. Imports from Latin American countries mostly include **fresh fruit** (especially bananas, apples and pears), **cane sugar and coffee**.

As regards the African continent, **Tunisia**, **Togo** and **Egypt** are undoubtedly the countries from which the greatest amount of organic products are imported, namely **olive oil** from Tunisia, **soybeans** from Togo and **potatoes** from Egypt.

Imports from **North America** mainly concern **durum wheat** from **Canada** and **legumes** from the **US**.

Table 11
VOLUMES OF ORGANIC PRODUCTS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY AND GEOGRAPHICAL AREA
2017 AND 2018
IN TONNES, %

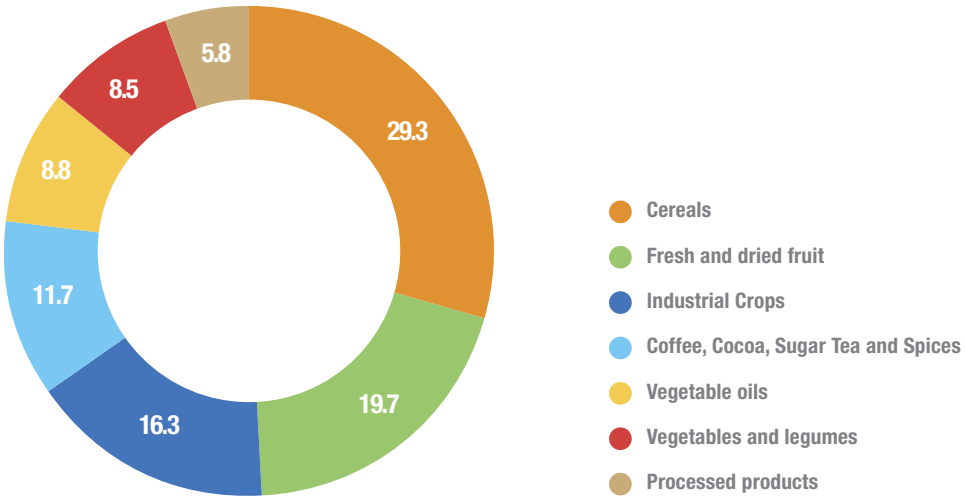
Product category	Area of origin	Volume (t) 2017	Volume (t) 2018	% Change 2018/2017
Cereals	Africa	-	-	-
	Asia	22.850,0	19.911,1	-12,9
	Central America	-	-	-
	Non-EU Europe	19.185,0	30.096,0	56,9
	North America	3.276,4	2.891,7	-11,7
	Oceania	-	-	-
	South America	2.681,3	1.524,9	-43,1
	Total	**47,992.8**	**54,423.8**	**13.4**
Fruit	Africa	358.7	615.0	71.5
	Asia	989.0	570.4	-42.3
	Central America	4,730.3	4,106.6	-13.2
	Non-EU Europe	4,186.6	4,159.6	-0.6
	North America	47.0	69.5	47.8
	Oceania	310.4	470.5	51.6
	South America	24,934.8	26,573.7	6.6
	Total	**35,556.8**	**36,565.5**	**2.8**
Vegetables and legumes	Africa	2,883.9	1,057.1	-63.3
	Asia	5,687.1	8,431.2	48.3
	Central America	-	-	-
	Non-EU Europe	4,103.4	4,923.5	20.0
	North America	429.1	434.3	1.2
	Oceania	-	-	-
	South America	1,137.1	913.2	-19.7
	Total	**14,240.7**	**15,759.3**	**10.7**
Industrial crops*	Africa	6,065.6	3,496.3	-42.4
	Asia	29,945.5	22,759.2	-24.0
	Central America	-	-	-
	Non-EU Europe	24,333.3	3,946.7	-83.8
	North America	75.2	21.5	-71.5
	Oceania	-	-	-
	South America	595.0	130.1	-78.1
	Total	**61,014.7**	**30,353.8**	**-50.3**

Table 11
VOLUMES OF ORGANIC PRODUCTS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY AND GEOGRAPHICAL AREA
2017 AND 2018
IN TONNES, %

Product category	Area of origin	Volume (t) 2017	Volume (t) 2018	% Change 2018/2017
Vegetable oils and fats	Africa	16,891.2	16,198.8	-4.1
	Asia	74.8	96.6	29.2
	Central America	-	33.7	-
	Non-EU Europe	20.4	2.5	-87.5
	North America	60.3	31.0	-48.6
	Oceania	-	-	-
	South America	65.5	24.9	-62.0
	Total	**17,112.1**	**16,387.5**	**-4.2**
Coffee, Cocoa, Sugar, Tea and Spices	Africa	331.5	640.0	93.0
	Asia	1,430.2	2,596.0	81.5
	Central America	2,158.7	6,540.2	203.0
	Non-EU Europe	214.3	540.5	152.2
	North America	4,274.5	616.6	-85.6
	Oceania	0.0	0.0	-33.3
	South America	11,675.7	10,762.0	-7.8
	Total	**20,085.1**	**21,695.4**	**8.0**
Processed products	Africa	1,139.2	887.5	-22.1
	Asia	2,442.6	2,547.0	4.3
	Central America	3.2	7.1	125.6
	Non-EU Europe	7,189.4	4,820.2	-33.0
	North America	366.3	977.8	166.9
	Oceania	0.5	0.4	-30.4
	South America	1,275.6	1,551.4	21.6
	Total	**12,416.7**	**10,791.5**	**-13.1**
Total products		**208,418.8**	**185,976.6**	**-10.8**

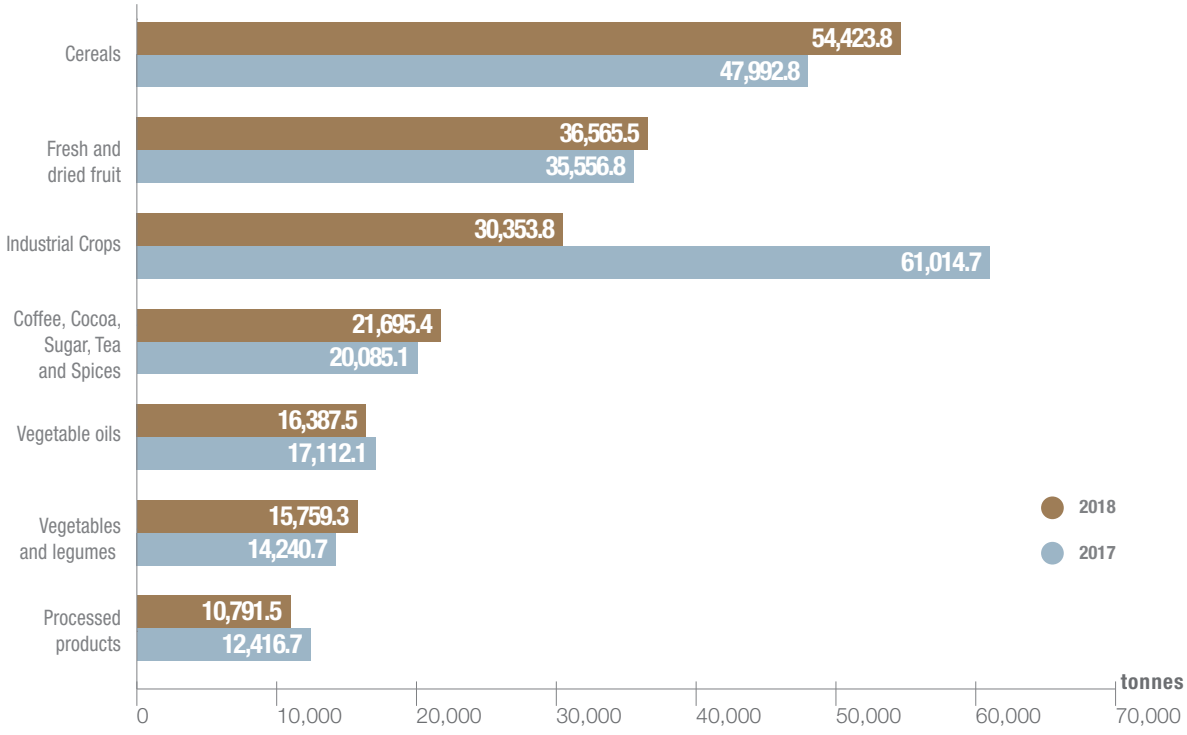
**The category "Industrial crops" also includes soybean meal*
Source: Compiled by SINAB based on data provided by SIB

Chart 23
SHARE OF ORGANIC PRODUCTS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT TYPE
2018
% VOLUMES



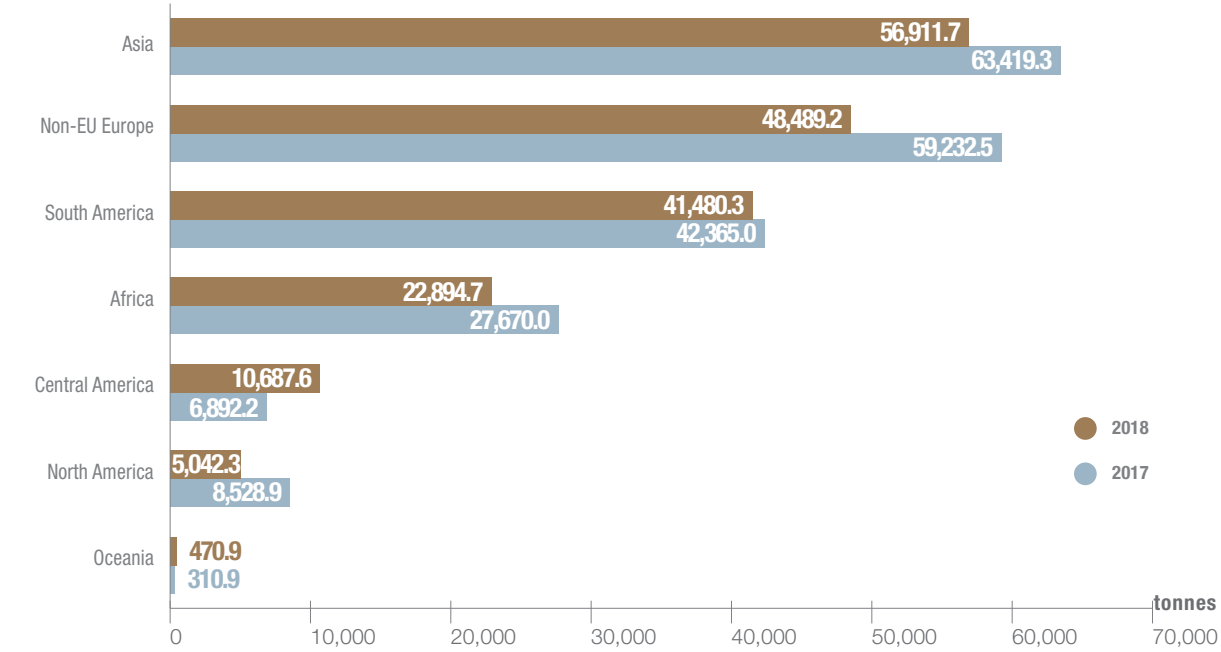
Source: Compiled by SINAB based on data provided by SIB

Chart 24
VOLUMES OF ORGANIC PRODUCTS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY
2017 AND 2018
IN TONNES



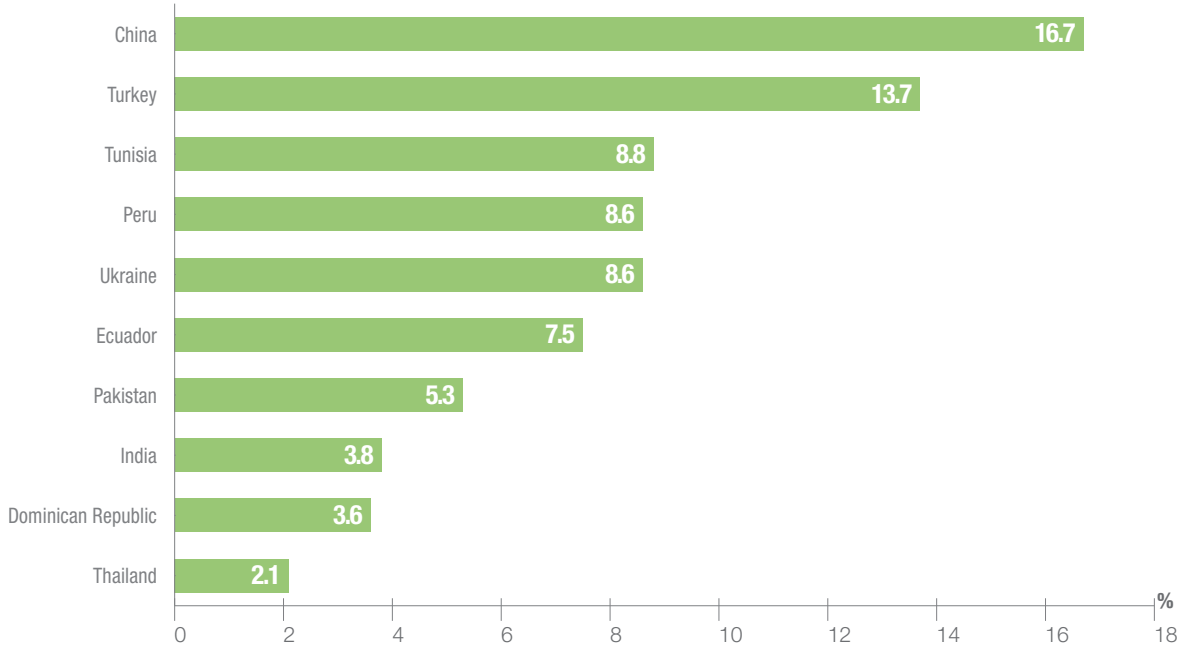
Source: Compiled by SINAB based on data provided by SIB

Chart 25
VOLUMES OF ORGANIC PRODUCTS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY GEOGRAPHICAL AREAS
2017 AND 2018
IN TONNES



Source: Compiled by SINAB based on data provided by SIB

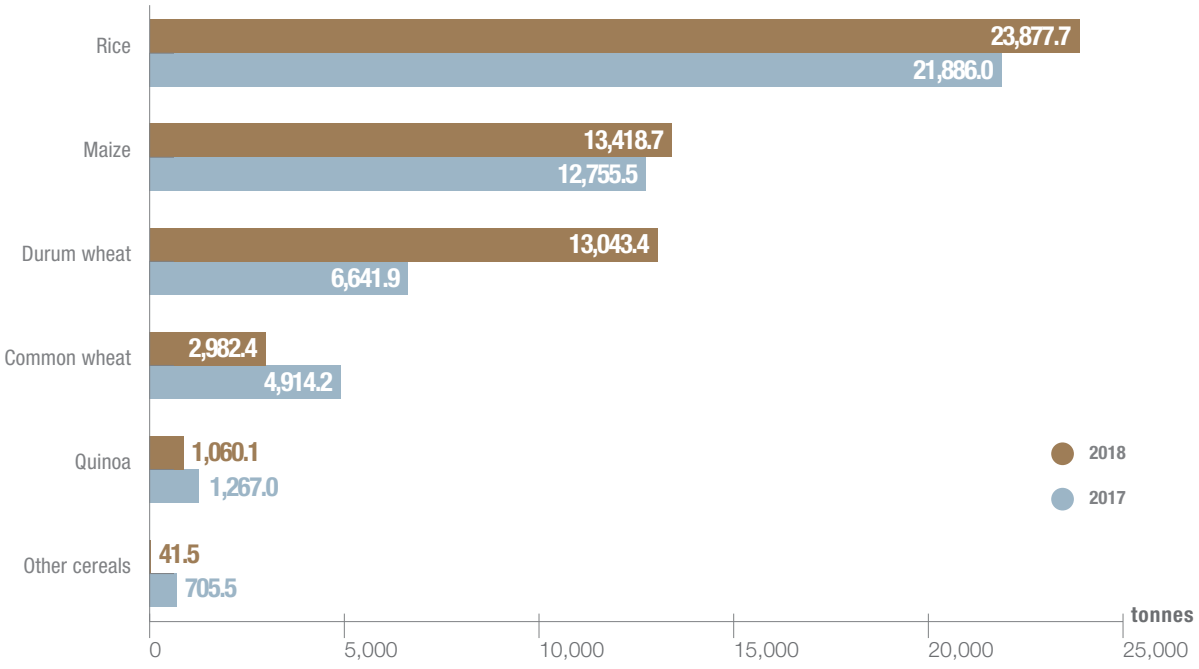
Chart 26
SHARE OF IMPORTS FROM THE TOP 10 THIRD COUNTRIES IN TOTAL IMPORT VOLUME OF ORGANIC PRODUCTS IN ITALY
2018
% VOLUME



Source: Compiled by SINAB based on data provided by SIB

CEREALS

Chart 27
VOLUMES OF ORGANIC CEREALS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY
2017 AND 2018
IN TONNES



Source: Compiled by SINAB based on data provided by SIB

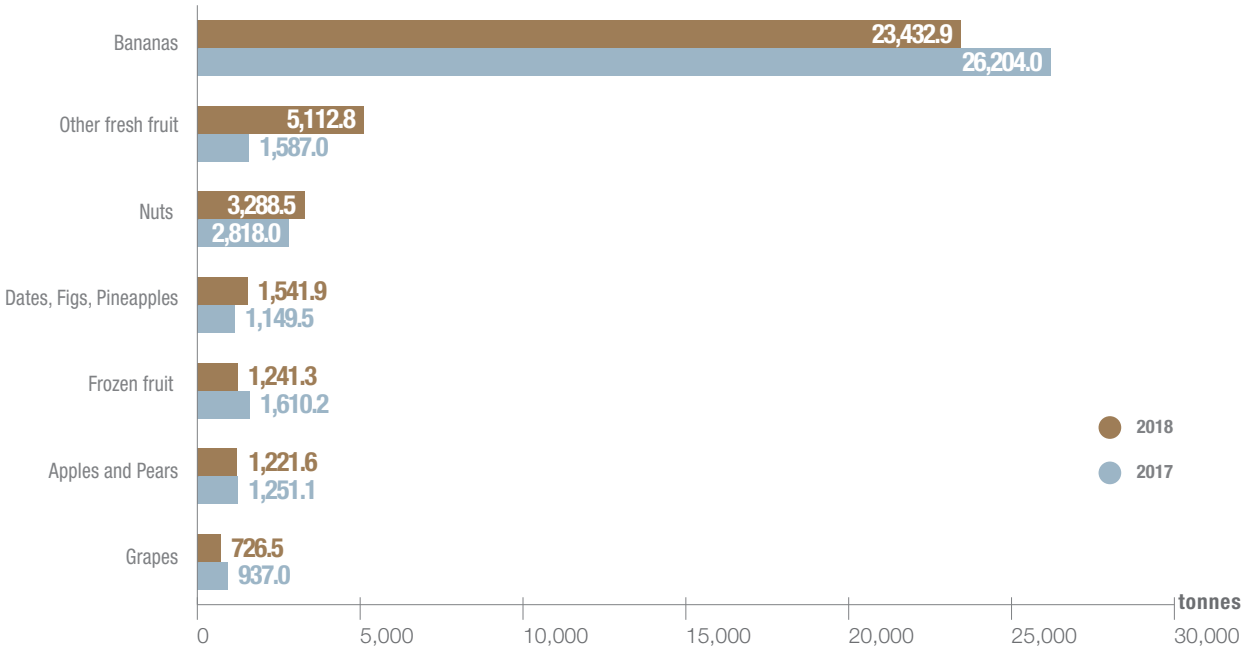
Table 12
VOLUMES OF ORGANIC CEREALS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY AND COUNTRY OF ORIGIN
2018
IN TONNES

Geographical area	Country	Durum wheat	Rice	Common wheat	Quinoa	Maize	Other cereals	Total Cereals
Asia	Cambodia	-	1,701.5	-	-	-	-	**1,701.5**
	China	-	-	-	-	-	23.5	**23.5**
	India	-	5,395.0	-	-	-	-	**5,395.0**
	Indonesia	-	7.8	-	-	-	-	**7.8**
	Pakistan	-	9,633.6	-	-	-	-	**9,633.6**
	Thailand	-	3,149.7	-	-	-	-	**3,149.7**
Non-EU Europe	Moldavia	-	-	-	-	1,434.0	-	**1,434.0**
	Serbia	-	-	145,3	-	-	-	**145.3**
	Switzerland	-	72.0	-	-	-	-	**72.0**
	Turkey	13,000.0	3,460.0	-	-	-	-	**16,460.0**
	Ukraine	-	-	-	-	11,984.7	-	**11,984.7**
North America	Canada	43.4	-	2,837.1	-	-	-	**2,880.5**
	United States	-	1.3	-	-	-	10.0	**11.3**
South America	Argentina	-	216.8	-	-	-	-	**216.8**
	Bolivia	-	-	-	285.2	-	-	**285.2**
	Brazil	-	240.0	-	-	-	-	**240.0**
	Chile	-	-	-	40.0	-	-	**40.0**
	Peru	-	-	-	734.8	-	8.0	**742.8**
Total cereals		**13,043.4**	**23,877.7**	**2,982.4**	**1,060.1**	**13,418.7**	**41.5**	**54,423.8**

Source: Compiled by SINAB based on data provided by SIB

FRESH AND DRIED FRUITS

Chart 28
VOLUMES OF ORGANIC FRESH AND DRIED FRUITS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY
2017 AND 2018
IN TONNES



Source: Compiled by SINAB based on data provided by SIB

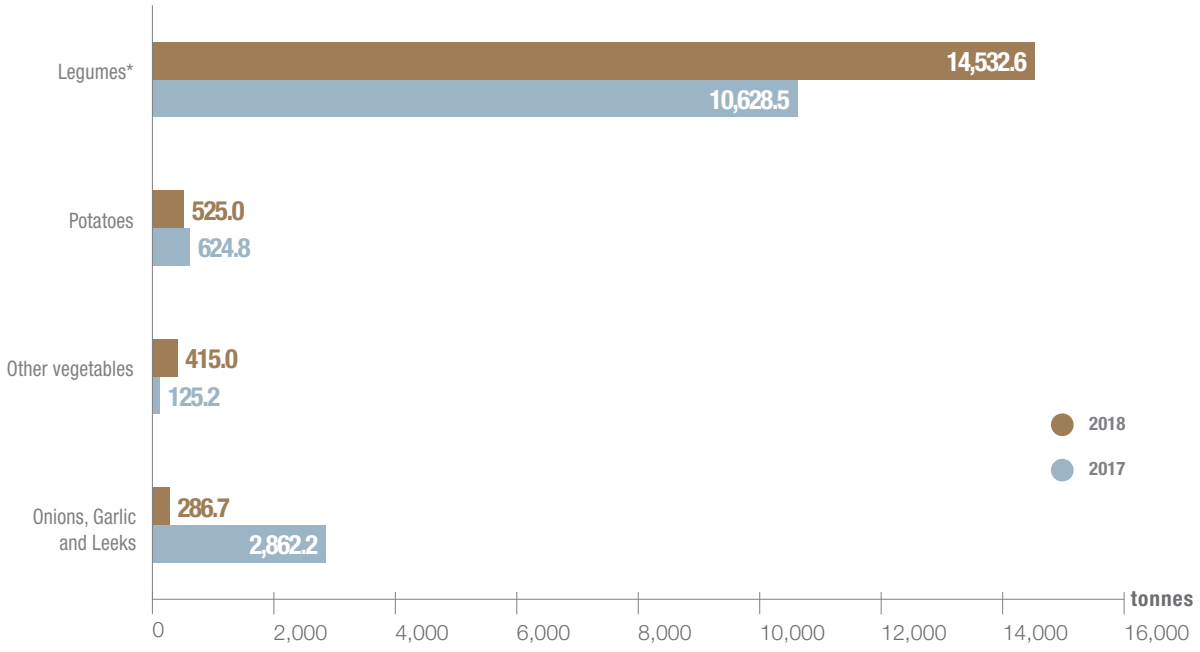
Table 13
VOLUMES OF ORGANIC FRESH AND DRIED FRUITS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY AND COUNTRY OF ORIGIN
2018
IN TONNES

Geographical Area	Country	Bananas	Nuts	Dates, Figs and Pineapples	Grapes	Apples and Pears	Other fresh fruit	Frozen fruit	Total Fruit
Africa	Burkina Faso	-	33.1	14.0	-	-	-	-	47.1
	Ivory Coast	-	156.8	-	-	-	-	-	156.8
	Kenya	-	-	19.6	-	-	158.0	-	177.6
	Morocco	-	-	-	-	-	2.3	-	2.3
	Senegal	-	42.0	-	-	-	-	-	42.0
	South africa	-	-	-	-	-	6.5	-	6.5
	Togo	-	-	1.6	-	-	14.9	-	16.5
	Tunisia	-	-	166.1	-	-	-	-	166.1
Asia	China	-	44.5	-	-	-	-	-	44.5
	India	-	9.5	-	-	-	-	-	9.5
	Indonesia	-	0.0	-	-	-	-	-	0.0
	Israel	-	-	105.0	-	-	-	-	105.0
	Philippines	20.0	113.0	-	-	-	-	-	133.0
	Sri Lanka	-	23.2	-	-	-	1.9	-	25.2
	Thailand	-	-	-	-	-	-	-	-
	Vietnam	-	253.3	-	-	-	-	-	253.3
Central America	Costa Rica	-	-	-	-	-	1,248.7	-	1,248.7
	Dominican Republic	2,857.9	-	-	-	-	-	-	2,857.9
Non-EU Europe	Albania	-	142.5	-	-	-	81.3	83.6	307.4
	Bosnia and Herzegovina	-	1.0	-	-	-	-	-	1.0
	Moldova	-	315.6	-	-	-	-	-	315.6
	Serbia	-	-	-	-	-	-	119.1	119.1
	Switzerland	-	8.1	-	-	-	-	0.4	8.5
	Turkey	-	1,428.9	125.7	726.5	-	8.5	424.5	2,714.0
	Ukraine	-	99.7	-	-	-	-	594.5	694.2
North America	Mexico	-	-	-	-	-	6.7	-	6.7
	United States	-	22.6	-	-	-	40.1	-	62.8
Oceania	New Zealand	-	-	-	-	366.5	104.0	-	470.5
South America	Argentina	-	105.7	-	-	835.8	891.2	-	1,832.6
	Bolivia	-	144.0	-	-	-	-	-	144.0
	Brazil	-	216.1	-	-	-	-	-	216.1
	Chile	-	88.0	-	-	19.3	1,478.6	19.4	1,605.3
	Colombia	1,175.5	2.4	9.1	-	-	-	-	1,187.0
	Ecuador	12,795.5	5.0	-	-	-	819.9	-	13,620.4
	Paraguay	-	-	1,090.0	-	-	-	-	1,090.0
	Peru	6,584.0	33.5	10.8	-	-	250.2	-	6,878,5
Total		23,432.9	3,288.5	1,541.9	726.5	1,221.6	5,112.8	1,241.3	36,565.5

Source: Compiled by SINAB based on data provided by SIB

VEGETABLES AND LEGUMES

Chart 29
VOLUMES OF ORGANIC VEGETABLES AND LEGUMES IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY
2017 AND 2018
IN TONNES



**Lentils, Beans, Peas, Chickpeas*
Source: Compiled by SINAB based on data provided by SIB

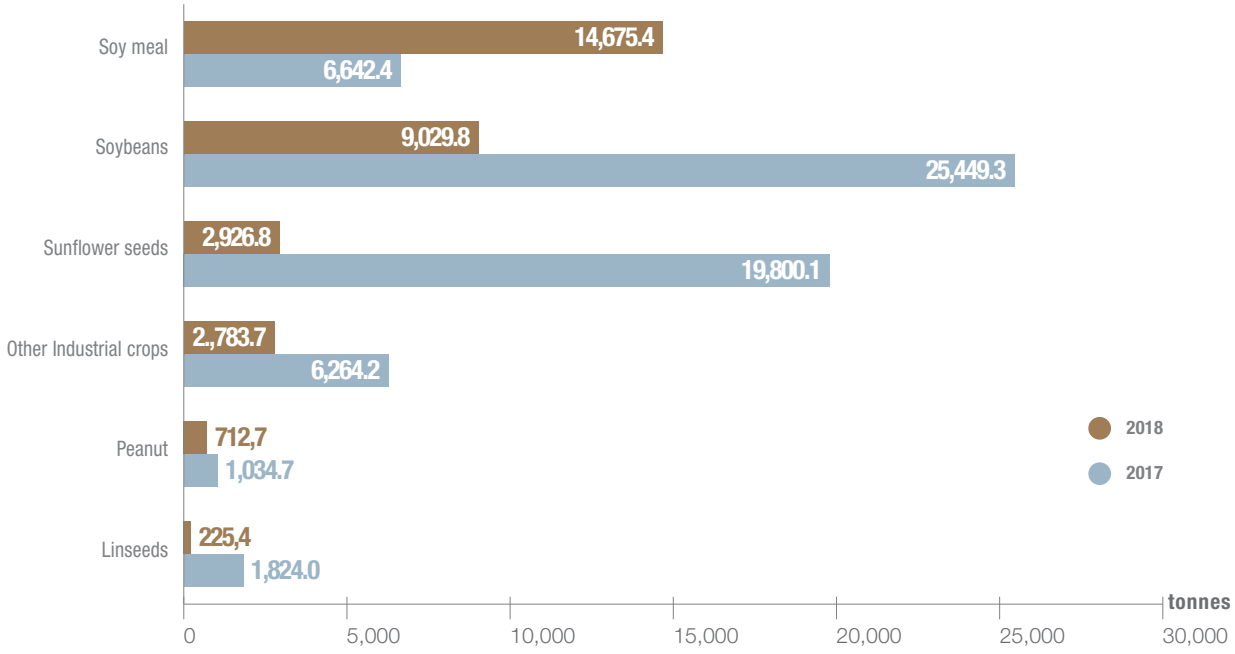
Table 14
VOLUMES OF ORGANIC VEGETABLES AND LEGUMES IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY AND COUNTRY OF ORIGIN
2018
IN TONNES

Georaphical area	Country	Potatoes	Onions, Shallots, Garlic and Leeks	Legumes	Vegetables	Total Vegetables and Legumes
Africa	Egypt	525.0	216.7	238.0	18.0	**997.7**
	Morocco	-	-	30.3	2.2	**32.4**
	Tunisia	-	27.0	-	-	**27.0**
Asia	China	-	-	8,022.6	68.5	**8,091.1**
	Japan	-	-	0.2	-	**0.2**
	India	-	2.0	138.0	-	**140.0**
	Kazakhstan	-	-	200.0	-	**200.0**
Non-Eu Europe	Bosnia and Herzegovina	-	-	0.5	-	**0.5**
	North Macedonia	-	-	-	3.0	**3.0**
	Serbia	-	-	0.5	10.2	**10.8**
	Switzerland	-	-	0.2	-	**0.2**
	Turkey	-	-	4,793.7	115.2	**4,908.9**
North America	Canada	-	-	112.9	-	**112.9**
	United States	-	-	321.4	-	**321.4**
South America	Argentina	-	41.0	231.9	197.8	**470.7**
	Colombia	-	-	223.6	-	**223.6**
	Paraguay	-	-	218.9	-	**218.9**
Total		**525.0**	**286.7**	**14,532.6**	**414.9**	**15,759.2**

**Lentils, Beans, Peas, Chickpeas*
Source: Compiled by SINAB based on data provided by SIB

INDUSTRIAL CROPS

Chart 30
VOLUMES OF ORGANIC INDUSTRIAL CROPS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY
2017 AND 2018
IN TONNES



Source: Compiled by SINAB based on data provided by SIB

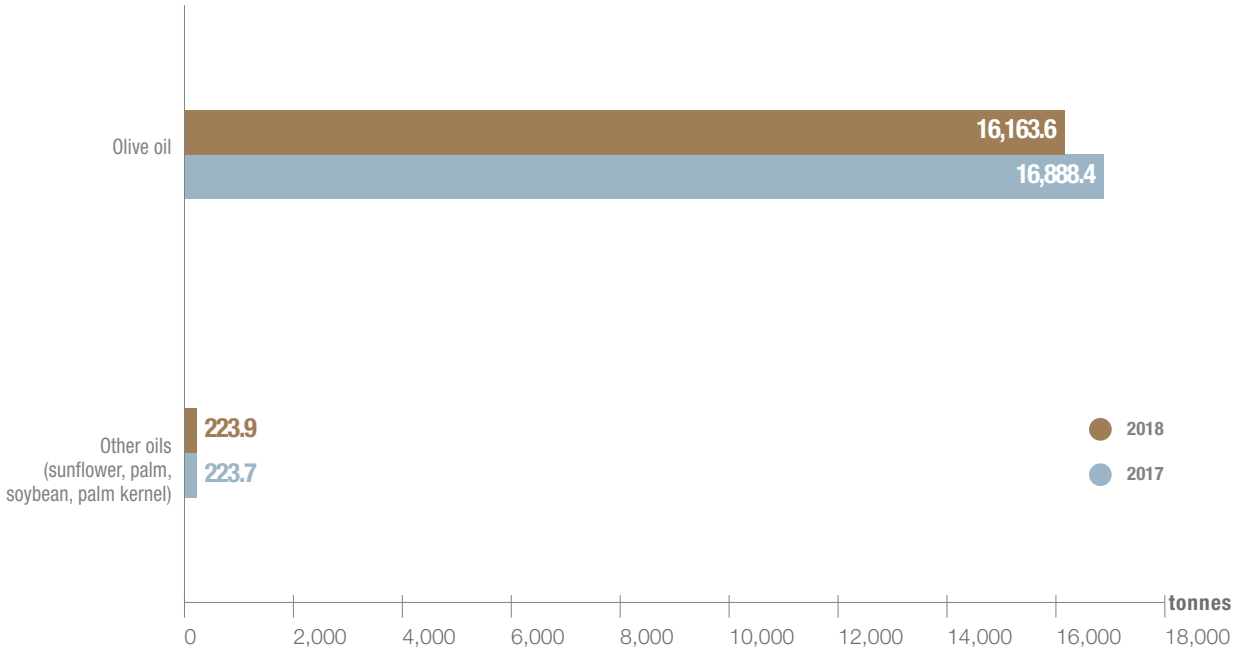
Table 15
VOLUMES OF ORGANIC INDUSTRIAL CROPS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY AND COUNTRY OF ORIGIN
2018
IN TONNES

Geographical area	Country	Soybeans	Soy meal	Peanut	Linseeds	Sunflower seeds	Other industrial crops	Total industrial crops
Africa	Egypt	-	-	673.2	-	-	64.8	738.0
	Kenya	-	-	-	-	-	0.8	0.8
	Morocco	-	-	-	-	-	193.5	193.5
	Namibia	-	-	-	-	-	2.0	2.0
	South Africa	-	-	-	-	-	17.4	17.4
	Togo	694.7	-	-	-	-	1,315.0	2,009.7
	Tunisia	-	-	-	-	-	94.9	94.9
	Uganda	440.0	-	-	-	-	-	440.0
Asia	China	6,826.1	14,675.4	39.5	37.5	202.5	527.3	22,308.3
	India	-	-	-	103.9	10.0	337.0	450.9
Non-EU Europe	Albania	-	-	-	-	-	17.7	17.7
	Bosnia and Herzegovina	-	-	-	-	-	8.7	8.7
	North Macedonia	-	-	-	-	-	5.5	5.5
	Moldova	-	-	-	-	348.0	-	348.0
	Republic of San Marino	-	-	-	-	-	-	-
	Serbia	-	-	-	-	181.4	-	181.4
	Switzerland	-	-	-	-	-	18.5	18.5
	Turkey	-	-	-	84.0	-	29.0	113.0
	Ukraine	1,069.0	-	-	-	2,184.9	-	3,253.9
North America	Canada	-	-	-	-	-	0.2	0.2
	Mexico	-	-	-	-	-	1.7	1.7
	United States	-	-	-	-	-	19.6	19.6
South America	Argentina	-	-	-	-	-	82.0	82.0
	Bolivia	-	-	-	-	-	0.5	0.5
	Brazil	-	-	-	-	-	20.0	20.0
	Paraguay	-	-	-	-	-	27.6	27.6
TOTAL		9,029.8	14,675.4	712.7	225.4	2,926.8	2,783.7	30,353.8

Source: Compiled by SINAB based on data provided by SIB

VEGETABLE OILS AND FATS

Chart 31
VOLUMES OF ORGANIC VEGETABLE OILS AND FATS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY
2017 AND 2018
IN TONNES



Source: Compiled by SINAB based on data provided by SIB

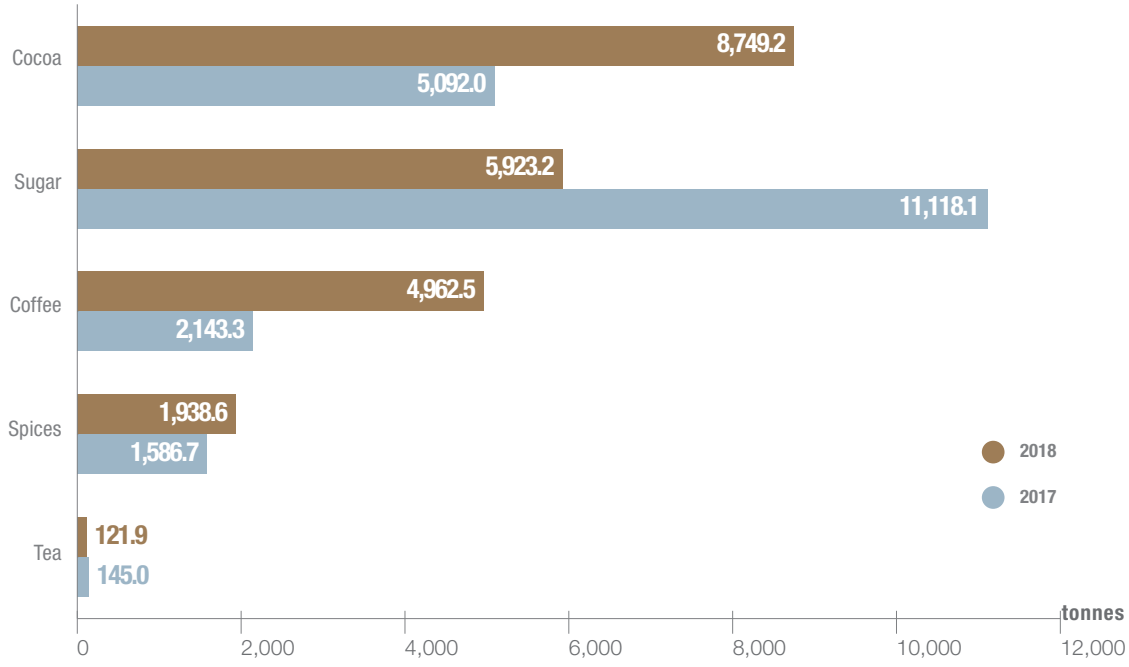
Table 16
VOLUMES OF ORGANIC VEGETABLE OILS AND FATS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY AND COUNTRY OF ORIGIN
2018
IN TONNES

Geographical area	Country	Olive oil	Other oils	Total vegetable oils and fats
Africa	Morocco	91.3	8.1	**99.4**
	Tunisia	16,071.3	28.1	**16,099.3**
Asia	China	-	1.0	**1.0**
	Israel	1.1	-	**1.1**
	Sri Lanka	-	94.5	**94.5**
	Thailand	-	0.0	**0.0**
Central America	Dominican Republic	-	33.7	**33.7**
Non-EU Europe	Switzerland	-	2.2	**2.2**
	Turkey	-	0.4	**0.4**
North America	United States	-	31.0	**31.0**
South America	Brazil	-	21.0	**21.0**
	Chile	-	3.1	**3.1**
	Peru	-	0.9	**0.9**
Total		**16,163.6**	**223.9**	**16,387.5**

Source: Compiled by SINAB based on data provided by SIB

COFFEE, COCOA, SUGAR, TEA AND SPICES

Chart 32
VOLUMES OF ORGANIC COFFEE, COCOA, SUGAR, TEA AND SPICES IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY
2017 AND 2018
IN TONNES



Source: Compiled by SINAB based on data provided by SIB

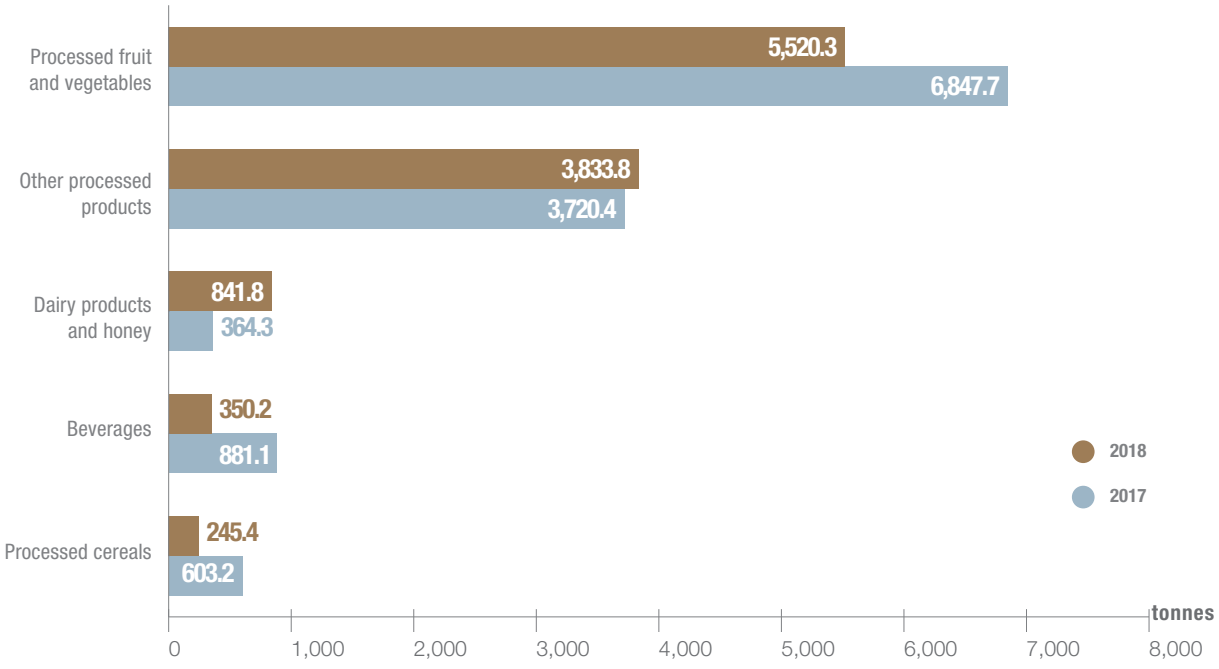
Table 17
VOLUMES OF ORGANIC COFFEE, COCOA, SUGAR, TEA AND SPICES IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY AND COUNTRY OF ORIGIN
2018
IN TONNES

Geographical area	Country	Coffee	Tea	Spices	Sugar	Cocoa	Total Coffee, Cocoa, Sugar, Tea and Spices
Africa	Ivory Coast	-	-	-	-	75.1	**75.1**
	Egypt	-	-	12.0	-	-	**12.0**
	Ethiopia	76.8	-	-	-	-	**76.8**
	Madagascar	-	-	-	-	25.0	**25.0**
	Morocco	-	-	0.0	-	-	**0.0**
	Republic of Congo	-	-	-	-	191.0	**191.0**
	South Africa	-	1.5	-	-	-	**1.5**
	Uganda	144.6	-	-	-	114.0	**258.6**
Asia	Cambodia	-	-	-	38.0	-	**38.0**
	China	-	3.2	43.6	-	-	**46.8**
	India	244.5	94.9	144.0	365.0	-	**848.3**
	Indonesia	-	-	1.0	15.6	-	**16.6**
	Japan	-	20.2	0.1	-	-	**20.3**
	Pakistan	-	-	-	185.9	-	**185.9**
	Philippines	-	-	-	862.2	-	**862.2**
	Sri Lanka	-	0.5	4.0	-	-	**4.5**
	Thailand	-	-	-	573.5		**573.5**
Central America	Dominican Republic	2.6	-	-	-	3,875.0	**3,877.6**
	Guatemala	76.1	-	-	91.7	-	**167.8**
	Honduras	2,057.5	-	-	-	-	**2,057.5**
	Nicaragua	437.4	-	-	-	-	**437.4**
Non-EU Europe	Republic of San Marino	-	-	-	-	9.0	**9.0**
	Switzerland	22.1	1.7	1.0	-	506.7	**531.5**
North America	Canada	1.9	-	-	43.4	-	**45.3**
	Mexico	402.3	-	-	163.7	-	**566.0**
	United States	-	-	-	5.3	-	**5.3**
Oceania	New Zealand	-	-	-	0.0	-	**0.0**
South America	Argentina	-	-	-	325.0	-	**325.0**
	Bolivia	-	-	-	-	0.7	**0.7**
	Brazil	-	-	5.6	798.0	12.0	**815.6**
	Colombia	118.5	-	-	320.6	-	**439.1**
	Ecuador	-	-	-	371.5	16.4	**387.9**
	Paraguay	-	-	-	372.0	-	**372.0**
	Peru	1,378.2	-	1,727.3	1,391.9	3,924.3	**8,421.8**
Total		**4,962.5**	**121.9**	**1,938.6**	**5,923.2**	**8,749.2**	**21,695.4**

Source: Compiled by SINAB based on data provided by SIB

OTHER PROCESSED PRODUCTS

Chart 33
VOLUMES OF OTHER PROCESSED PRODUCTS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY
2017 AND 2018
IN TONNES



Source: Compiled by SINAB based on data provided by SIB

Table 18
VOLUMES OF OTHER PROCESSED PRODUCTS IMPORTED TO ITALY FROM THIRD COUNTRIES, BY PRODUCT CATEGORY AND COUNTRY OF ORIGIN
2018
IN TONNES

Geographical area	Country	Processed fruit and vegetables	Processed cereals	Dairy producs and Honey	Beverages	Other processed products	Total processed products
Africa	Ivory Coast	-	-	-	-	102.8	102.8
	Mali	439.4	-	-	-	-	439.4
	Morocco	-	-	-	-	16.0	16.0
	South Africa	316.8	-	-	-	12.5	329.3
Asia	China	0.4	-	0.5	-	517.4	518.3
	India	136.4	-	-	-	37.1	173.5
	Israel	15.4	148.6	-	-	1.6	165.5
	Japan	4.9	5.6	-	3.8	63.1	77.4
	Pakistan	-	-	-	-	49.0	49.0
	Philippines	196.0	-	-	-	-	196.0
	Sri Lanka	-	-	-	10.3	1,059.5	1,069.8
	Thailand	-	-	-	8.2	238.2	246.4
	Vietnam	-	-	-	-	51.1	51.1
Central America	Costa Rica	7.1	-	-	-	-	7.1
Non-EU Europe	Albania	-	-	-	-	16.4	16.4
	Bosnia and Herzegovina	31.6	-	-	34.4	-	65.9
	North Macedonia	0.7	-	-	-	-	0.7
	Norway	-	-	-	-	78.5	78.5
	Republic of San Marino	-	0.2	-	-	-	0.2
	Serbia	2,532.5	-	-	-	-	2,532.5
	Switzerland	-	8.1	600.6	28.3	143.8	780.8
	Turkey	960.7	82.0	-	-	282.6	1,325.3
	Ukraine	20.0	-	-	-	-	20.0
North America	Canada	72.9	-	-	1.0	325.5	399.4
	Mexico	267.7	-	71.7	-	219.9	559.3
	United States	0.2	-	-	-	18.9	19.1
Oceania	New Zealand	-	-	0.4	-	-	0.4
South America	Argentina	80.7	-	40.8	216.7	-	338.2
	Bolivia	-	1.0	-	-	-	1.0
	Brazil	399.5	-	92.8	13.4	452.9	958.6
	Chile	11.4	-	22.7	34.0	-	68.1
	Ecuador	26.0	-	-	-	-	26.0
	Peru	-	-	-	-	12.6	12.6
	Uruguay	-	-	12.4	-	134.4	146.9
Total		5,520.3	245.4	841.8	350.2	3,833.8	10,791.5

Source: Compiled by SINAB based on data provided by SIB

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