SINAB – Sistema d'Informazione Nazionale sull'Agricoltura Biologica

"SINAB" is the **National Information System on Organic Farming** set up by the Italian **Ministry of Agricultural, Food and Forestry Policies (MiPAAF)** and implemented by **ISMEA - Institute for Market Services on Agro-food Sector** and **MAIB – Mediterranean Agronomic Institute of Bari**. The project started in 1999.
SINAB has been conceived as a single national system, originated by the integration and cooperation of all the existing information centres: a system including as well all the most important research structures.

SINAB OBJECTIVES

- Constant updating of the institutional information system on organic farming **www.sinab.it** (an English version is provided)
- Technical-informative support and strengthening of the MiPAAF "Organic Farming" Office activities
- Development of a Polycentric Documentation Centre
- Development of an Institutional Intranet network

SINAB TOOLS

Legislation & Policies: on organic farming at international, European, national and regional level.
Research & Experimentation: survey of the activities provided by the main scientific national institutions.
Regions: for each Italian Region, information on legislation, Control Bodies, Research Institutes and statistics.
Services: news, agenda, press review.
Bio-Statistics: data warehouse of the national statistics on organic farming.

Service Centre and Information Front Office: they are in Rome at the service of the MiPAAF. They represent the "junction" of the network created among the different Institutions to facilitate the exchange of information and to strengthen the connection within the organic faming sector. The Centre avail itself of the collaboration of technicians expert in organic farming.

Operators and surfaces

This report includes the SINAB processing of the data supplied to the Italian Ministry of Agricultural, Food and Forestry Policies (MiPAAF) by all the Control Bodies operating in Italy. Data were monitored to answer to the European Commission requirements following the EUROSTAT instructions.
Based on the data available at December 31st 2013, the results show that the organic **operators** in Italy are **52.383** of which: 41.513 producers only; 6.154 processors (including companies that carry out retail activities); 4.456 engaged in production and processing; 260 importers only or importers engaged in production or process activities.
Comparing the data with the ones related to the previous year (2012), it appears relevant an increase of **5,4%** of all the certified operators. The distribution of operators on the National area shows Sicily and Calabria among the regions with the highest presence of organic farms.
The related **area**, in conversion or fully converted to organic agriculture, has reached **1.317.177** hectares, with an increase of **12,8%** compared to 2012.
The main crops are forage, grazing pastures, cereals and olive.

Table 1 –
Number of operators by type and region - 2013

	Producers only	Processors only	Producers / Processors	Importers *	TOTAL OPERATORS AT 12/31/2013	Total at 12/31/2012	*% change '13 - '12*
TOTAL	**41.513**	**6.154**	**4.456**	**260**	**52.383**	**49.709**	*5,4*
SICILIA	8.954	564	358	12	**9.888**	7.918	*24,9*
CALABRIA	6.574	218	372	4	**7.168**	7.201	*-0,5*
PUGLIA	5.289	513	444	8	**6.254**	6.111	*2,3*
EMILIA ROMAGNA	2.537	794	336	51	**3.718**	3.604	*3,2*
TOSCANA	2.399	499	787	16	**3.701**	3.530	*4,8*
LAZIO	2.636	345	231	8	**3.220**	3.302	*-2,5*
SARDEGNA	2.073	65	90	0	**2.228**	2.199	*1,3*
MARCHE	1.734	204	220	4	**2.162**	2.007	*7,7*
PIEMONTE	1.324	383	255	36	**1.998**	1.899	*5,2*
CAMPANIA	1.433	325	159	6	**1.923**	1.896	*1,4*
VENETO	946	573	247	38	**1.804**	1.746	*3,3*
LOMBARDIA	809	656	217	43	**1.725**	1.697	*1,6*
PP. AA. TN e BZ	1.088	338	210	8	**1.644**	1.532	*7,3*
ABRUZZO	1.096	205	145	2	**1.448**	1.551	*-6,6*
UMBRIA	911	130	156	6	**1.203**	1.215	*-1,0*
BASILICATA	1.011	77	78	0	**1.166**	1.180	*-1,2*
FRIULI VENEZIA GIULIA	232	114	66	5	**417**	416	*0,2*
LIGURIA	214	103	56	12	**385**	379	*1,6*
MOLISE	178	39	20	1	**238**	236	*0,8*
VALLE D'AOSTA	75	9	9	0	**93**	90	*3,3*

Table 2 –
Percentage of change by operator type

	2012	2013	*% change '13 - '12*
Producers only	**40.146**	**41.513**	*3,4*
Processors only	**5.597**	**6.154**	*10,0*
Producers / Processors	**3.669**	**4.456**	*21,4*
Importers*	**297**	**260**	*-12,5*
TOTAL OPERATORS	**49.709**	**52.383**	**5,4**

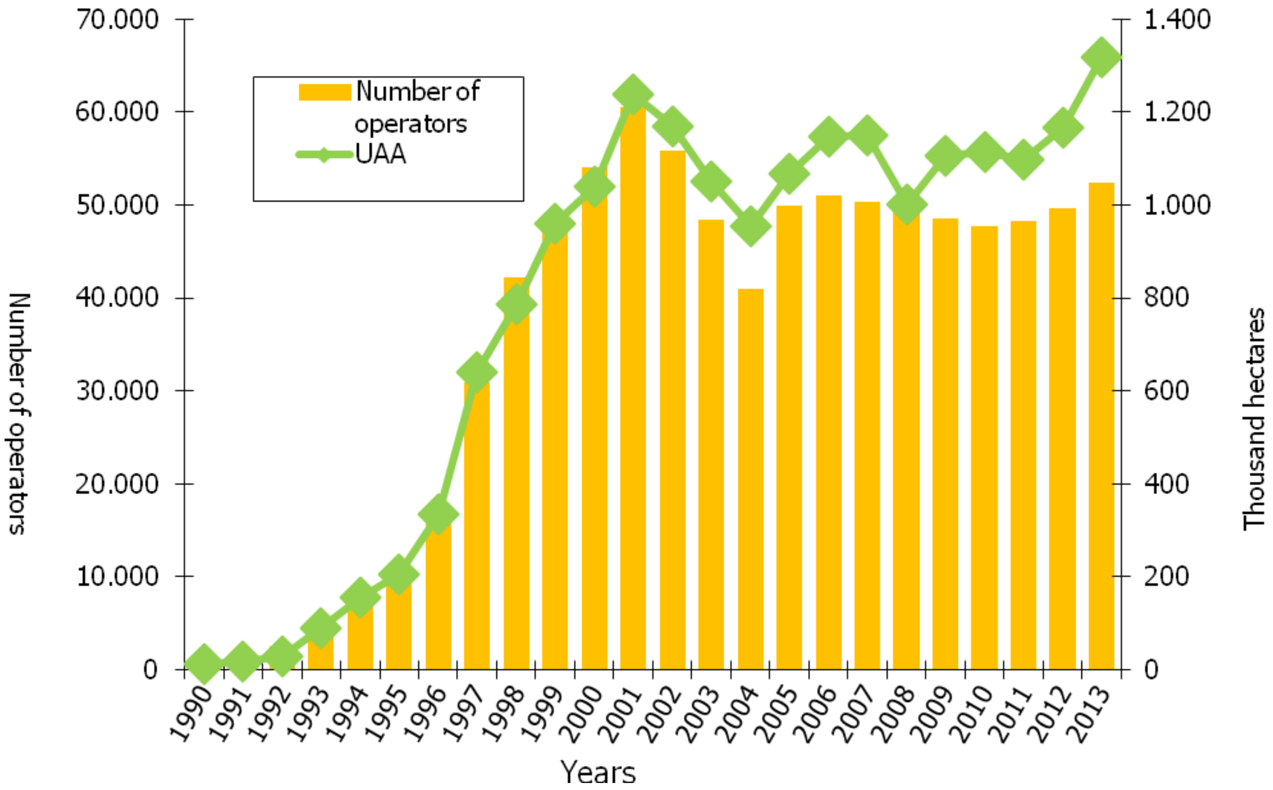
* All the importers (only and also involved in the other activities)

Table 3 –
Surfaces and crops at 12/31/2013 (hectares)

	in conversion	organic	TOTAL
TOTAL CROPS	**339.470**	**977.707**	**1.317.177**
Cereals	39.520	151.880	**191.400**
Dried pulses and protein crops for the production of grain	4.224	22.686	**26.909**
Root crops	141	768	**909**
Industrial crops	2.108	14.007	**16.115**
Plants harvested green	46.386	202.615	**249.000**
Other arable land crops	9.558	15.795	**25.353**
Fresh vegetables*	4.306	17.982	**22.288**
Fruit**	6.806	26.734	**33.540**
Nuts	18.118	20.843	**38.961**
Citrus fruit	6.637	22.178	**28.816**
Vineyard	23.763	44.174	**67.937**
Olives	46.372	129.574	**175.946**
Other permanent crops	666	3.102	**3.768**
Pastures and meadows (excl rough grazing)	75.609	188.504	**264.113**
Rough grazing	39.927	76.187	**116.114**
Fallow land	15.364	40.815	**56.179**
Specific crops (not to be included in the total): Forest and wild plants, Damask rose (Rosa damascena), Christmas trees, Others n.e.c.	*18.632*	*44.015*	***62.647***

* "strawberries" and "cultivated mushrooms" are include in "fresh vegetables"
** "fruit" includes "fruit of temperate climate zones", "fruit of subtropical climate zones" and "berries"

Graph 1 –
Operators and surfaces in Italy from 1990 to 2013



1993-2013: MiPAAF data; elaboration: SINAB (1999-2013), Bio Bank (1995-1998), IFOAM (1994), Nomisma (1993).
1990-1992: elaboration SINAB on various estimation.

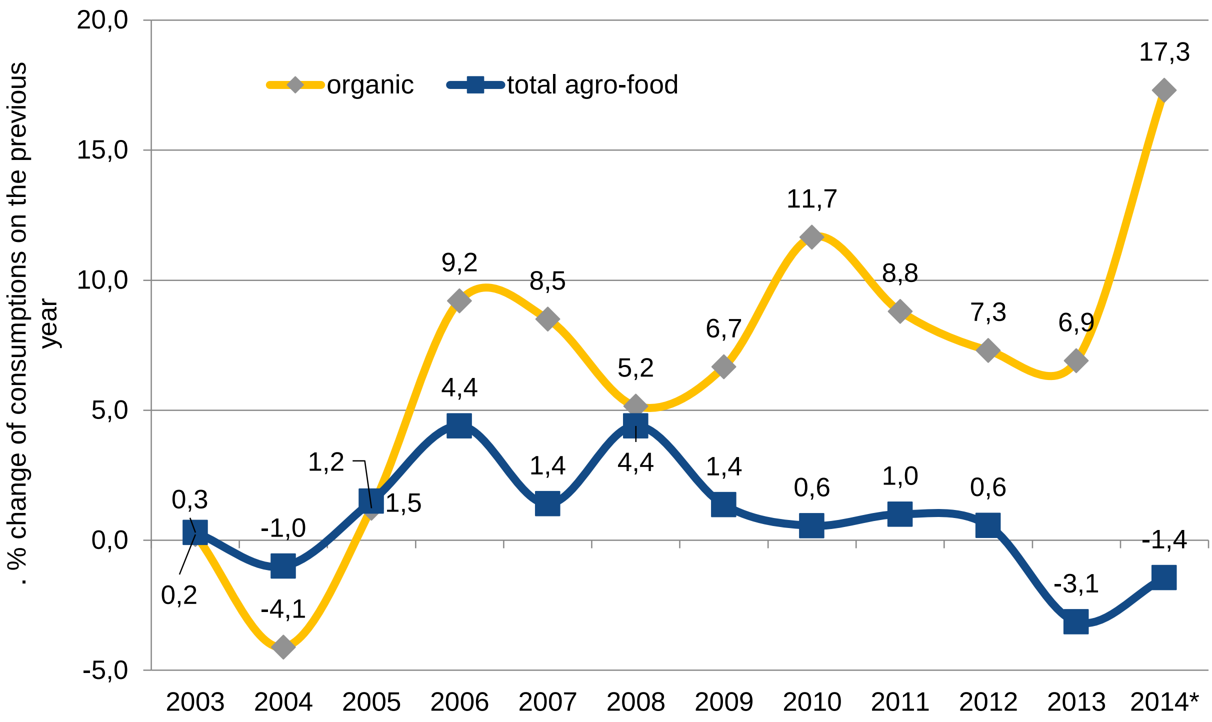
Table 4 –
Livestock (number of heads)

	2007	2008	2009	2010	2011	2012	2013	*Var % '13-'12*
Bovine	244.156	216.476	185.513	207.015	193.675	203.823	**231.641**	*13,6*
Pigs	26.898	34.014	25.961	29.411	32.436	42.872	**43.318**	*1,0*
Sheep	859.980	1.007.605	658.709	676.510	705.785	707.623	**755.419**	*6,8*
Goats	93.876	83.411	74.500	71.363	72.344	79.683	**92.330**	*15,9*
Poultry	1.339.415	2.157.201	2.399.885	2.518.830	2.813.852	2.824.978	**3.063.404**	*8,4*
Equidae	8.325	9.903	8.597	9.563	9.548	9.663	**13.404**	*38,7*
Bees (n. hives)	112.812	102.280	103.216	113.932	99.260	128.241	**140.004**	*9,2*
Other animals	1.926	2.501	2.948	2.089	5.939	7.751	**10.184**	*31,4*

The internal demand

Despite the economic crisis, the Italian market of organic products is still on the rise, by confirming a positive trend in place since 2005.
According to the Ismea's Families Panel Gfk-Eurisko, in the first five months of 2014 the household purchases of packed organic products in the Modern Trade have increased by **17,3%** in monetary value, while in the same period the agro-food sector expenditure decreased (-1,4%).

Graph 2 –
Evolution of domestic consumptions trend of packed organic products and agro-food sector in the Modern Trade



**first five months of 2014*
Source: Ismea, Families Panel - Nielsen data till 2010, GFK Eurisko data from 2011

The big increase of organic products is the highest of the last twelve years, as only in 2002 there had been an higher growth. Despite the small period of only five months, this increase depends on different reasons that are the following:

- Increase of the number of references and assortment of organic products in the Modern Trade;
- Introduction in the Modern Trade of new kind of products, that were not present in the last years (for example, Senatore Cappelli pasta, kamut based products, etc.);
- Positive signals from the market, that have induced to offer these products;
- Introduction of new organic private labels also in the *discounts* channel.

So the organic sector seems still going in strong countertrend, compared with the whole agro-food sector, and shows a promising increase that gives hopes on a possible widening of the share on the total national consumption of agro-food products.
The 2014 trend depend particularly on the big increases registered by pasta, rice and bread substitutes and the category "sugar, coffee and tea". For fresh and processed fruit and vegetables, biscuits, cakes and snacks the increases is from 11 to 15%.
Organic eggs (+5,2%), dairy products (+3,2%) and beverages (+2,5%) registered smaller increases, very different from the very good growth of honey and baby food, even if in association with a fairly small market value.

Table 5 –
Domestic purchases in value of packed organic products in the Modern Trade in 2013 and in the first five months of 2014

Organic category	% change 13/12	% change jan-may 14 / jan-may 13	% share 2013	% share jan-may 14
Total packed organic products	**6,9**	**17,3**	**100,0**	**100,0**
of which:				
Fresh and processed fruit and vegetables	9,3	11,0	30,5	30,5
Dairy products	-0,9	3,2	19,0	15,5
Eggs	16,0	5,2	11,4	9,6
Pasta, rice and bread substitutes	10,3	73,0	10,0	14,2
Biscuits, cakes and snacks	18,0	15,1	8,7	8,7
Sugar, coffee and tea	6,6	37,2	4,2	4,7
Beverages	5,1	2,5	3,8	3,4
Baby food	-16,2	21,3	3,0	3,2
Fresh and processed meat	-1,5	11,3	1,7	1,2
Vinegar	19,8	23,5	0,7	0,7

Source: Ismea, Families Panel GFK-Eurisko

Switching from the analysis for category showed in Table 5 at that for single product (not in the table), eggs are the organic product more purchased, with a share of 9,6% on the total expenditure of packed organic products and with an increase of the consumption in 2014 first five months of 5,2%. This growth is due to an increase of the average household expenditure, even if the number of purchasing households is in decrease.
The second organic product more purchased is represented by bread substitutes, with a share of 8% on the total of organic products. Bread substitutes register an increase in the number of purchasing households, in the average household expenditure and, consequently, also in the penetration on the total consumptions of bread substitutes (organic + not organic).
The trend of the expenditure of drinking milk, third organic product for purchases in value with a share on the total of organic products of 7,3%, has been as much positive (+16,3%), due to an increase of the average household expenditure.

Imports from third Countries[1]

Until 2011, imports of organic products coming from third Countries could be carried out through different ways:

(a) Imports from third Countries whose production standards and control system equivalence to the provisions of the European Union was established by the EU Commission. Countries in equivalence, laid down in annex III of Reg, 1235/2008, are: Argentina, Australia, Canada, Costa Rica, India, Israel, Japan, Switzerland, Tunisia, United States, and New Zealand.

(b) Imports from operators of a third Country whose method of production is rated equivalent by Inspection Bodies and authorized by the EU Commission to operate in certain Countries for certain product groups. The list of authorized Inspection Bodies in different Countries is contained in annex IV of Reg. 1235/2008 and covers 53 Inspection Bodies working in 132 Countries.

(c) For imports not covered by previous points and for a transitional period ended in june 2014, Member States may still grant permissions for products obtained in accordance with EU regulations.

For imports referred to in point (c), the MiPAAF, after specific verification activity, grants quantitative permissions to individual importing firms.

The tables shared are the result of processing, based on data relating to authorizations granted by the MiPAAF.

The processed data represent the quantities actually imported from Italian companies that have obtained special authorization by the MiPAAF.

It is therefore necessary to underline that such data, being related only to ministerial authorizations and not taking into account the other import mode (cases (a) and (b) above), are not exhaustive of all the quantities of organic product coming into Italy from third Countries.

For the first time in the reference year 2012, the data on organic products imported in Italy from third Countries have included, in addition to the operations carried out in the transitional regime (c), imports made under the equivalence ((a) and (b)). Although more comprehensive than in the past, should be emphasized that the processing presented does not take into account the activities of intra-Community trade and therefore is not exhaustive of all the quantities of organic products that come to Italy from third Countries through other EU Countries.

Data on imports of organic products from third Countries show for 2013 a net increase of the total quantities, at about 21 percentage points.

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1 ORGANICDATA NETWORK 5 9 3 7 Co-funded by the European Union

This section was undertaken as part of the research project "Data network for better European organic market information" (OrganicDataNetwork). This project has received funding from the European Union's Seventh Framework Programme for research, technological development and demonstration under grant agreement No. 289376.

Table 6 –
Quantities of organic product imported in Italy in 2012 and 2013. by product and by area of origin (values in tons)

Product category	Area of origin	Quantity (t) 2013	Quantity (t) 2012	Var % 2013 / 2012
Cereals	Africa	0.00	0.00	0.00
	Central America	0.00	0.00	0.00
	North America	2,322.93	2,029.64	14.45
	South America	439.65	382.58	14.92
	Asia	3,176.12	4,167.04	-23.78
	Non-EU Europa	135.71	6,880.00	-98.03
	Oceania	42.00	0.00	0.00
	Total	**6,116.41**	**13,459.25**	**-54.56**
Industrial crops	Africa	0.00	0.00	0.00
	Central America	0.00	0.00	0.00
	North America	5.00	0.00	0.00
	South America	0.00	0.00	0.00
	Asia	19,430.81	6,540.92	197.07
	Non-EU Europa	1,526.92	1,242.67	22.87
	Oceania	0.00	0.00	0.00
	Total	**20,962.73**	**7,783.59**	**169.32**
Fresh and dried fruit	Africa	589.13	159.75	268.78
	Central America	2,086.72	300.47	594.48
	North America	99.10	108.96	-9.05
	South America	9,954.20	8,528.77	16.71
	Asia	184.51	212.43	-13.14
	Non-EU Europa	2,502.12	805.58	210.60
	Oceania	1.05	0.00	0.00
	Total	**15,416.83**	**10,115.96**	**52.40**
Natural extracts	Africa	96.19	178.58	-46.14
	Central America	3.67	31.88	-88.49
	North America	116.16	4.22	2,650.00
	South America	46.06	65.92	-30.13
	Asia	202.64	319.49	-36.57
	Non-EU Europa	162.66	5.03	3,135.63
	Oceania	0.00	0.00	0.00
	Total	**627.38**	**605.13**	**3.68**
Fresh vegetables	Africa	2,990.12	3,035.50	-1.49
	Central America	0.00	0.00	0.00
	North America	195.24	218.52	-10.65
	South America	458.06	793.17	-42.25
	Asia	1,619.10	779.98	107.58
	Non-EU Europa	934.28	823.00	13.52
	Oceania	0.00	0.00	0.00
	Total	**6,196.80**	**5,650.17**	**9.67**
Processed products	Africa	4,067.27	4,004.38	1.57
	Central America	855.65	1,312.46	-34.81
	North America	420.67	236.77	77.67
	South America	3,354.78	4,796.29	-30.05
	Asia	1,421.48	996.45	42.65
	Non-EU Europa	2,971.86	2,706.01	9.82
	Oceania	0.00	0.00	0.00
	Total	**13,091.71**	**14,052.37**	**-6.84**
Total		**62,411.86**	**51,666.46**	**20.80**