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MINISTERO DELL'AGRICOLTURA DELLA SOVRANITÀ ALIMENTARE E DELLE FORESTE

ISMEA

CIHEAM BARI

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GRAPHIC DESIGN
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CONTENT

ACRONYMS

A.P.
Autonomous Province

CB
Control Body

CIHEAM BARI
Mediterranean Agronomic Institute of Bari

CN
Combined Nomenclature

EC
European Commission

EU
European Union

ISMEA
Institute of Services for the Agricultural and Food Market

ISTAT
Italian National Institute of Statistics

MASAF
Ministry of Agriculture, Food Sovereignty and Forests

SIB
Organic Information System

SINAB
National Information System on Organic Agriculture

SPA
Survey on the Structure of Agricultural Holdings

TARIC
Integrated Tariff of the European Communities

TRACES
TRAde Control and Expert System

UAA
Utilised Agricultural Area

UNIVPM
Polytechnic University of Marche

CROP AREAS AND LIVESTOCK SHARE OF ORGANICS IN ITALY

Administrative and statistical data compilation

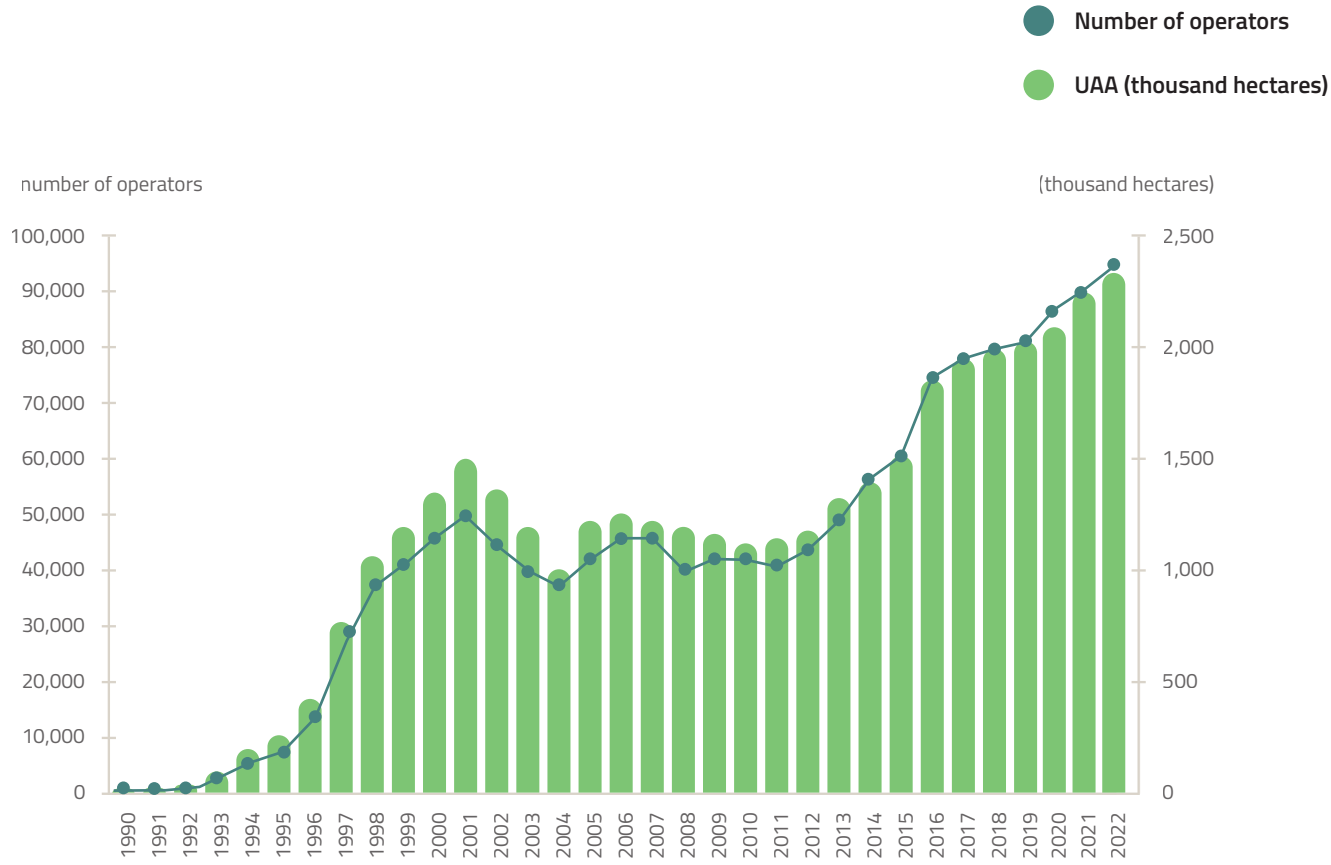
Delizia Del Bello

AREAS AND CROPS

Figures in Italy

As of 31 December 2022, the area under organic farming in Italy exceeded 2.3 million hectares, growing by +7.5% on an annual basis. The number of hectares under organic cultivation has increased by 111% (more than 1.2 million hectares) compared to the reference year 2010. Over the last three years, organic areas have expanded on average by +5.6% and a comparable rise in the number of total organic operators (+4.8%) has also been reported **(Chart 1.1).**

Chart 1.1
Organic farming in Italy: areas (ha) and operators (number)
1990 - 2022
Hectares and number

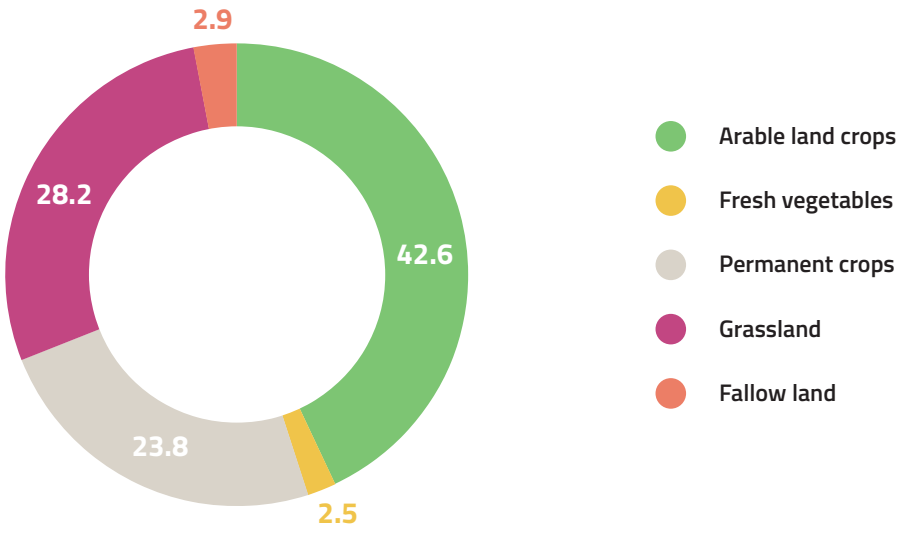


Source: Compilation by SINAB on Control Bodies and Regional Authorities data

Main Crop Types

The national organic UAA included 42% of arable land crops (1,000,134 hectares), 2.9 % of fresh vegetables (59,572 hectares), and 23.8% of permanent crops (558,716 hectares), 28.2% of grassland (including rough grazing) (662,252 hectares) and 2.5% of fallow lands (69,207 hectares) **(Chart 1.2).**

Chart 1.2
Distribution of organic UAA by macrocategory
2022
Percentage values



Source: Compilation by SINAB on Control Bodies data

As highlighted in the tables below, among arable crops, which increased overall by +2.5% in 2022, cereals (+17,620 hectares, +5.1%), industrial crops (+7,788 hectares, +18.1%) and fodder crops (+8,385 hectares, +2.0%) recorded the best performance. Cereals were driven by higher investments in durum wheat (+3,046 hectares, +1.9%) and common wheat (+3,187 hectares, +5.2%), barley (+5,962 hectares, +16.1%) and oats (+3,092 hectares, +12.6%).
In 2022, fresh vegetables declined only slightly (-0.4%), while the area under permanent crops increased by +9.0%. Fruit trees cultivation exceeded 558,000 hectares, reflecting an upward trend already reported in the past two years. The most significant, double-digit increase was recorded for the leading Italian agri-food produce: almond (+2,706 hectares, +16.0%), citrus (+3,339 hectares, +10.5%), and olive groves for oil production (+25,741 hectares, +10.5%). Interestingly, hazelnut groves were also on the rise (+1,525 hectares, +8.9%) along with organic vineyards (+7,594 hectares, +6.0%), which reached 133,140 hectares in 2022. Fruit of temperate climate zones remained stable (+0.5%) with an approximately 100-150 hectares variation for almost all stone fruits, except for cherries (+14.9%). Berries (+3.8%), fruit of subtropical climate zones (+9.0%) and nuts (+9.4%) also maintained a positive trend. Finally, meadows and pastures also grew in 2022 (+14.3%) **(Table 1.1, 1.2 and 1.3).**

Table 1.1
Organic areas and crops in Italy
2021 and 2022
Hectares and percentage values

	2021			2022	Percentage change 2022/2021
	Total organic	Under conversion	Fully converted	Total organic	%
TOTAL	**2,186,570**	**506,408**	**1,843,473**	**2,349,880**	**7.5**
Arable land crops	**975,358**	**189,014**	**811,120**	**1,000,134**	**2.5**
Cereals	342,727	68,813	291,534	360,346	5.1
Dried pulses and protein crops for the production of grain	55,761	7,692	40,188	47,880	-14.1
Root crops	3,861	476	3,190	3,666	-5.0
Industrial crops	42,932	6,645	44,075	50,720	18.1
Plants harvested green	423,833	77,344	354,874	432,218	2.0
Other arable crops	106,245	28,044	77,259	105,303	-0.9
Vegetables*	59,792	10,268	49,304	59,572	-0.4
Permanent crops	**512,763**	**121,405**	**437,310**	**558,716**	**9.0**
Fruit**	42,162	7,906	35,432	43,338	2.8
Nuts	54,838	12,897	47,076	59,973	9.4
Citrus fruit	31,717	6,579	28,477	35,056	10.5
Vineyards	128,127	31,823	103,844	135,667	5.9
Olives	247,637	59,245	214,379	273,624	10.5
Other permanent crops	8,282	2,955	8,103	11,057	33.5
Permanent meadows and pastures	579,384	168,862	493,390	662,252	14.3
Permanent grassland (excl. rough grazing)	356,365	116,093	312,185	428,279	20.2
Rough grazing	223,019	52,768	181,205	233,973	4.9
Fallow land	**59,273**	**16,859**	**52,348**	**69,207**	**16.8**
Other categories not included in the total***	378,860	79,567	273,354	352,922	-6.8

*'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: Compilation by SINAB on Control Bodies data

Considering a 3-year period from 2020 to 2022, certified arable lands recorded a + 117 thousand hectares growth and rose by 13.2% while the area under vegetable cultivation decreased by almost 9.5 thousand hectares.

During the same period, green fodder remained stable overall, rising by just 1.3%, i.e., more than 5.3 thousand hectares. As for permanent crops, fruit orchards, vineyards and olive groves grew by more than 10%.

Table 1.2
Organic areas by main crop types in Italy
2010, 2020 - 2022
Hectares and percentage values

	2010	2020	2021	2022	Percentage change 2022/2020	Difference 2022/2020	Percentage change 2022/2010	Difference 2022/2010
	Hectares			Hectares	%	Hectares	%	Hectares
Arable land crops	**434,927**	**883,530**	**975,358**	**1,000,134**	**13.2**	**116,604**	**130.0**	**565,207**
Cereals	194,974	333,563	342,727	360,346	8.0	26,783	84.8	165,372
Root crops	**1,696**	**3,493**	**3,861**	**3,666**	**5.0**	**173**	**116.2**	**1,970**
Plants harvested green	**191,791**	**426,867**	**423,833**	**432,218**	**1.3**	**5,351**	**125.4**	**240,427**
Vegetables*	27,920	69,069	59,792	59,572	-13.7	-9,497	113.4	31,652
Permanent crops	318,429	495,295	512,763	558,716	12.8	63,421	75.5	240,287
Fruit**	22,196	39,120	42,162	43,338	10.8	4,218	95.3	21,142
Nuts	27,488	53,097	54,838	59,973	12.9	6,876	118.2	32,485
Citrus fruit	23,424	35,517	31,717	35,056	-1.3	-461	49.7	11,632
Vineyards	52,273	117,378	128,127	135,667	15.6	18,289	159.5	83,394
Olives	140,748	246,504	247,637	273,624	11.0	27,121	94.4	132,876
Other permanent crops	52,299	3,678	8,282	11,057	200.6	7,379	-78.9	-41,242
Meadows and pastures	**288,562**	**583,781**	**579,384**	**662,252**	**13.4**	**78,471**	**129.5**	**373,690**
Fallow lands	**43,904**	**62,933**	**59,273**	**69,207**	**10.0**	**6,274**	**57.6**	**25,303**
Italys'total UAA	**1,113,742**	**2,094,608**	**2,186,570**	**2,349,880**	**12.2**	**255,272**	**111.0**	**1,236,138**

*'Strawberries' and 'cultivated mushrooms' are included in vegetables
** Fruit includes 'fruit of temperate climate zones', 'fruit of sub-tropical climate zones', 'berries' (soft fruit)

Source: Compilation by SINAB on Control Bodies data

Table 1.3
Organic areas and crops in Italy
2021 and 2022
Hectares and percentage values

	Italy's surface areas 2021	Italy's surface areas 2022			Percentage change 2022/2021
	Total organic	Under conversion	Fully converted	Total organic	%
CEREALS FOR GRAIN PRODUCTION (INCLUDING SEEDS)	**342,727**	**68,813**	**291,533.7**	**360,346**	**5.1**
Durum wheat	161,456	30,976	133,526	164,502	1.9
Common wheat and spelt	60,840	8,150	55,877	64,027	5.2
Rye	379	28	332	360	-5.0
Barley	37,054	9,661	33,354	43,016	16.1
Oats	24,599	7,090	20,601	27,691	12.6
Grain maize	17,394	3,399	14,773	18,172	4.5
Triticale	4,991	831	3,654	4,485	-10.1
Other cereals	20,935	5,038	17,497	22,535	7.6
Rice	15,078	3,640	11,919	15,559	3.2
ROOT CROPS	**3,861**	**476**	**3,190**	**3,666**	**-5.0**
Potatoes (incl. early and seed potatoes)	1,375	231	1,036	1,267	-7.8
Sugar beet (excl. seeds)	1,608	48	1,478	1,526	-5.1
Other Root crops	878	197	676	873	-0.5
INDUSTRIAL CROPS	**42,932**	**6,645**	**44,075**	**50,720**	**18.1**
Total Oli seeds	**34,107**	**4,319**	**32,654**	**36,973**	**8.4**
Sunflower	13,294	1,481	12,957	14,438	8.6
Soya	15,912	2,416	13,834	16,250	2.1
Rape and turnip rape	3,218	365	4,233	4,598	42.9
Linseed	1,478	43	1,407	1,449	-2.0
Other Oil seeds	204	14	224	238	16.7
Tobacco	78	34	51	86	9.6
Hops	24	5	21	27	13.5
Total Textile crops	**311**	**67**	**371**	**438**	**40.8**
Cotton	1	17	52	70	-
Other Textile crops	310	49	319	368	18.6
Aromatic plants, medicinal and culinary plants	**7,131**	**2,029**	**9,884**	**11,912**	**67.0**
Other Industrial crops	**1,281**	**191**	**1,093**	**1,284**	**0.2**
PLANTS HARVESTED GREEN	**423,833**	**77,344**	**354,874**	**432,218**	**2.0**
Total annual plants harvested green	**83,897**	**17,214**	**69,514**	**86,728**	**3.4**
Green maize	1,893	570	1,891	2,461	30.0
Other annual plants harvested green	82,005	16,644	67,622	84,267	2.8
Temporary grasses and grazings	137,939	30,508	115,772	146,280	6.0

	Italy's surface areas 2021	Italy's surface areas 2022			Percentage change 2022/2021
	Total organic	Under conversion	Fully converted	Total organic	%
Other plants harvested green	201,996	29,622	169,588	199,210	-1.4
Lucerne (Alfalfa)	155,363	21,205	131,775	152,980	-1.5
Other	46,634	8,417	37,814	46,231	-0.9
Fresh vegetables, melons, strawberries, cultivated mushrooms	59,792	10,268	49,304	59,572	-0.4
All brassicas (excl. roots)	8,914	1,145	7,682	8,827	-1.0
Cauliflower and broccoli	4,302	829	4,933	5,761	33.9
Cabbage (white)	1,698	13	222	235	-86.2
Other brassicas	2,914	304	2,527	2,831	-2.9
Leafy or stalk vegetables (excl.brassicas)	**10,496**	**1,839**	**8,596**	**10,435**	**-0.6**
Celery	184	15	110	125	-31.8
Leeks	151	10	130	140	-7.5
Lettuces	559	72	395	467	-16.5
Endives	271	59	227	286	5.5
Spinach	1,247	102	1,243	1,345	7.9
Asparagus	1,666	239	1,333	1,571	-5.7
Chicory	1,083	85	1,055	1,140	5.2
Artichokes	1,280	324	963	1,287	0.5
Other leafy or stalk vegetables (excl. Brassicas)	4,056	933	3,141	4,074	0.4
Vegetables cultivated for fruit	**12,913**	**2,220**	**10,509**	**12,729**	**-1.4**
Tomatoes	8,371	1,420	6,812	8,232	-1.7
Cucumbers	52	5	40	45	-12.5
Gherkins	0	0	0	0	-
Melons	827	191	810	1,001	21.0
Watermelons	466	77	278	355	-23.7
Other vegetables cultivated for fruit	3,197	526	2,569	3,096	-3.2
Root tuber and bulb vegetables	2,291	315	1,833	2,148	-6.2
Carrots	782	106	706	812	3.8
Garlics	209	44	177	221	5.5
Onions	510	62	403	465	-8.9
Shallots	12	0	5	6	-53.9
Other root tuber and bulb vegetables	777	103	541	645	-17.0
Pulses	**20,206**	**3,746**	**16,425**	**20,171**	**-0.2**
Peas	7,848	1,511	6,036	7,547	-3.8
Beans	1,984	252	1,694	1,946	-1.9
Other pulses	10,375	1,984	8,694	10,678	2.9
Other vegetables	**4,227**	**913**	**3,610**	**4,523**	**7.0**
Strawberries	**333**	**60**	**275**	**335**	**0.5**
Cultivated mushrooms	**411**	**31**	**375**	**405**	**-1.5**

	Italy's surface areas 2021	Italy's surface areas 2022			Percentage change 2022/2021
	Total organic	Under conversion	Fully converted	Total organic	%
FRUIT	**42,162**	**7,906**	**35,432**	**43,338**	**2.8**
Fruit of temperate climate zones	30,372	5,705	24,822	30,527	0.5
Apples	8,237	927	7,146	8,073	-2.0
Pears	2,590	342	2,104	2,446	-5.6
Peaches	2,843	597	2,115	2,712	-4.6
Apricots	3,695	811	3,020	3,831	3.7
Nectarines	246	93	268	361	46.5
Cherries	3,920	1,097	3,410	4,506	14.9
Plums	1,348	238	1,245	1,482	9.9
Other fruit of temperate climate zones	7,492	1,602	5,515	7,117	-5.0
Berries (soft fruit)	**694**	**131**	**589**	**721**	**3.8**
Blackcurrant	118	9	50	59	-49.8
Raspberries	144	24	119	143	-0.6
Other berries	433	99	420	519	19.8
Fruit of sub-tropical climate zones	**11,095**	**2,069**	**10,022**	**12,091**	**9.0**
Figs	752	157	650	806	7.2
Kiwis	7,136	1,320	5,989	7,309	2.4
Avocado	188	67	144	210	12.0
Bananas	0	0	0	1	131.8
Other Fruit of sub-tropical climate zones	3,019	526	3,238	3,764	24.7
Nuts	**54,838**	**12,897**	**47,076**	**59,973**	**9.4**
Walnuts	1,828	342	1,498	1,840	0.6
Hazel nuts	17,216	4,539	14,202	18,741	8.9
Almonds	16,939	3,895	15,750	19,645	16.0
Chestnuts	17,066	3,711	14,589	18,300	7.2
Other nuts	1,790	410	1,037	1,448	-19.1
Citrus fruit	**31,717**	**6,579**	**28,477**	**35,056**	**10.5**
Pomelos and grapefruit	422	52	481	533	26.4
Lemons and acid limes	7,268	1,738	6,871	8,609	18.4
Oranges	15,370	3,285	13,949	17,234	12.1
Other citrus fruit (small citrus fruit)	8,657	1,504	7,175	8,680	0.3
Vineyards	**128,127**	**31,823**	**103,844**	**135,667**	**5.9**
Wine grape vineyards	125,546	31,272	101,868	133,140	6.0
Table grape vineyards	2,581	551	1,976	2,527	-2.1
Vineyards for raisin production	0	0	0	0	-
Olives	**247,637**	**59,245**	**214,379**	**273,624**	**10.5**
Table olives	1,342	259	1,330	1,589	18.4
Oil olives	246,295	58,987	213,049	272,035	10.5

Source: Compilation by SINAB on Control Bodies data

Regional distribution of organic crops

An analysis of the geographical distribution confirms that, in 2022, five regions totalled more than 56% of the national organic UAA: Sicily (387,202 ha), Apulia (320,829 ha), Tuscany (229,070 ha), Calabria (193,616 ha) and Emilia-Romagna (193,361 ha). Among these regions, Sicily (+71,055 ha, +22.5%) and Apulia (+34,021 ha, +11.9%) reported once again a double-digit growth, while Emilia-Romagna, although growing less compared to the two leading regions (+9,782 hectares, 5.3%), came a step closer to Calabria, which lost part of its certified surface area (-3,549 hectares, -1.8%); Tuscany slowed down compared to last year's considerable growth, with only +1.7% in 2022. On the other hand, the Autonomous Province of Bolzano (+10.1%), Lombardy (+7.1%) and Valle d'Aosta (+4.0%) showed a positive reverse trend with respect to 2021, while the number of hectares under organic farming fell by more than 2% to 5% in Basilicata, Umbria, Friuli-Venezia Giulia, and Molise **(Tables 1.4 and 1.5 and Infographic 1.1).** Concerning the crop macro categories, in the two-year period 2021-2022 trends were not homogeneous across the country and within the same region in terms of surface areas.

Table 1.4
Regional distribution of organic areas in Italy
2021 and 2022
Hectares and percentage values

	Organic area		Percentage Change 2022/2021	Difference 2022/2021
	2021	2022	%	Hectares
ITALY	2,186,570	2,349,880	7.5	163,310
A.P. Bolzano	12,603	13,875	10.1	1,272
A.P. Trento	10,752	15,421	43.4	4,669
Abruzzo	57,475	61,332	6.7	3,857
Apulia	286,808	320,829	11.9	34,021
Basilicata	122,555	119,375	-2.6	-3,180
Calabria	197,165	193,616	-1.8	-3,549
Campania	100,284	101,759	1.5	1,475
Emilia-Romagna	183,578	193,361	5.3	9,782
Friuli-Venezia Giulia	21,299	20,295	-4.7	-1,004
Latium	164,783	173,950	5.6	9,167
Liguria	5,914	7,089	19.9	1,175
Lombardy	50,605	54,180	7.1	3,576
Marche	116,398	121,416	4.3	5,019
Molise	12,645	12,325	-2.5	-320
Piedmont	51,528	54,617	6.0	3,089
Sardinia	150,456	171,462	14.0	21,006
Sicily	316,147	387,202	22.5	71,055
Tuscany	225,295	229,070	1.7	3,775
Umbria	50,936	49,348	-3.1	-1,587
Valle d'Aosta	1,255	1,304	4.0	50
Veneto	48,090	48,052	-0.1	-38

Source: Compilation by SINAB on Control Bodies data

Infographic 1.1
Regional distribution of organic areas in Italy
2022
Hectares

Source: Compilation by SINAB on Control Bodies data

Table 1.5
Regional distribution of organic areas by main crop types in Italy
2022
Hectares

	Cereals	Protein crops***	Root crops	Industrial crops	Plants harvested green	Other arable land crops	Vegetables*	Fruit**	Nuts	Citrus fruit	Vineyards	Olives	TOTAL
ITALY	**360,346**	**47,880**	**3,666**	**50,720**	**432,218**	**105,303**	**59,572**	**43,338**	**59,973**	**35,056**	**135,667**	**273,624**	**2,349,880**
A. P. Trento	34	0	38	16	136	2,495	115	1,001	60	0	1,651	109	**15,421**
A.p. Bolzano	176	8	46	31	47	6	62	2,978	26	0	664	3	**13,875**
Abruzzo	4,984	616	125	542	9,120	6,253	761	287	111	2	5,962	4,455	**61,332**
Apulia	63,463	11,804	95	3,569	27,966	19,581	12,650	7,924	9,385	2,090	19,372	88,652	**320,829**
Basilicata	42,143	6,935	24	7,540	16,627	5,786	3,794	1,860	703	986	1,087	6,130	**119,375**
Calabria	13,107	1,698	173	321	29,633	3,323	927	4,243	2,521	10,723	3,517	69,034	**193,616**
Campania	11,855	2,391	71	483	15,682	1,176	3,361	3,494	10,912	175	2,743	12,892	**101,759**
Emilia-Romagna	34,516	1,552	885	8,414	69,459	10,621	8,349	3,083	1,618	4	6,653	1,411	**193,361**
Friuli -Venezia Giulia	1,427	151	38	1,465	3,076	1,077	191	301	89	0	2,376	84	**20,295**
Latium	17,716	2,682	97	1,759	41,871	4,575	4,960	3,183	11,280	31	2,673	10,950	**173,950**
Liguria	75	1	7	74	219	205	92	34	86	1	79	629	**7,089**
Lombardy	23,015	439	111	4,490	10,225	1,003	2,489	704	95	1	4,234	292	**54,180**
Marche	22,010	2,923	613	4,756	34,146	2,363	4,179	803	889	1	6,866	3,714	**121,416**
Molise	3,253	855	1	834	2,127	1,589	319	255	185	0	568	1,109	**12,325**
Piedmont	8,942	404	124	2,952	6,446	2,157	1,881	2,938	4,544	0	4,238	344	**54,617**
Sardinia	8,000	558	57	325	22,390	18,020	718	324	157	101	1,147	4,270	**171,462**
Sicily	50,680	9,537	204	958	62,273	5,515	6,642	4,833	14,233	20,921	37,650	35,038	**387,202**
Tuscany	36,687	3,325	542	5,135	66,137	13,488	5,538	2,107	2,116	13	22,820	25,879	**229,070**
Umbria	7,541	1,640	50	978	10,607	3,883	546	288	804	0	1,620	8,087	**49,348**
Valle d'Aosta	6	0	2	2	72	33	3	7	2	0	34	0	**1,304**
Veneto	10,718	360	364	6,077	3,961	2,153	1,995	2,693	156	6	9,712	543	**48,052**

*'Strawberries' and 'cultivated mushrooms' are included in vegetables
**Fruit includes 'fruit of temperate climate zones', 'fruit of sub-tropical climate zones', 'berries' (soft fruit)
***Protein crops, dry pulses for grain production

Source: Compilation by SINAB on Control Bodies data

ANIMAL HUSBANDRY

Livestock numbers

Organic livestock farming also recovered in 2022 as the whole organic industry in Italy. Most organic livestock farms recorded a substantial increase: cattle (+10.5%), pigs (+12.1%) and poultry (with broilers and laying hens) (+16.9%), which exceeded 6 million heads on 31 December. Goats too were on the rise (+7.3%), reaching 107,000 heads, while the number of sheep fell slightly (-1.4%). Over the last three years, some discontinuous dynamics were observed that can be traced back to the COVID-19 pandemic. The pandemic might have reduced breeders' investments, thus leading in 2021 to an increase in the number of cattle (a little more than 12,000 heads), a substantial stability for pigs and a decrease for goats. Sheep farms were the only ones that recorded a drop in the number of heads for the whole period under review, while the poultry sector showed a growth trend **(Table 1.6).**

Table 1.6
Organic animal husbandry in Italy
2020 - 2022
Number of Live animals and percentage values

	2020	2021	2022	% Change 2021/2022
Bovine animals	397,187	409,332	452,320	10.5%
Goats	105,109	99,580	106,857	7.3%
Sheep	627,747	579,895	571,540	-1.4%
Pigs	58,263	58,536	65,590	12.1%
Poultry*	4,364,477	5,264,161	6,151,325	16.9%

*Includes broilers and laying hens

Source: Compilation by SINAB on Control Bodies data

SHARE OF ORGANICS IN ITALY

According to the last ISTAT Census, the national UAA amounts to 12,535,357 hectares and the share of the 2,350 million hectares certified organic in the total is equal to 18.7%.
Italy stands 6.3 percentage points behind the Farm to Fork Strategy's target of at least 25 % of organic land by 2030. Six regions have already reached more than 25% of organic UAA: Tuscany, Marche, Lazio, Basilicata, Calabria, and Sicily. National data broken down by geographical areas show that, in Italy, every 100 hectares of UAA are organic: 5.7 hectares in the North-west; 12.0 hectares in the North-east; 27.8 hectares in the Centre; 23.8 hectares in the South and 21.7 in the Islands. Organic farms account for 7.3% of total farms. with some important regional differences, at this aggregation level. The North-east and the South deviate from this value to a maximum -1%, while the share of organic farms reaches 4.5% in the North-west, 9.6% in the Centre and 8.1 in the Islands **(Table 1.7).**

Table 1.7
Organic farming in Italy: Share of areas and of farms in national total by geographical areas
2022
Percentage values

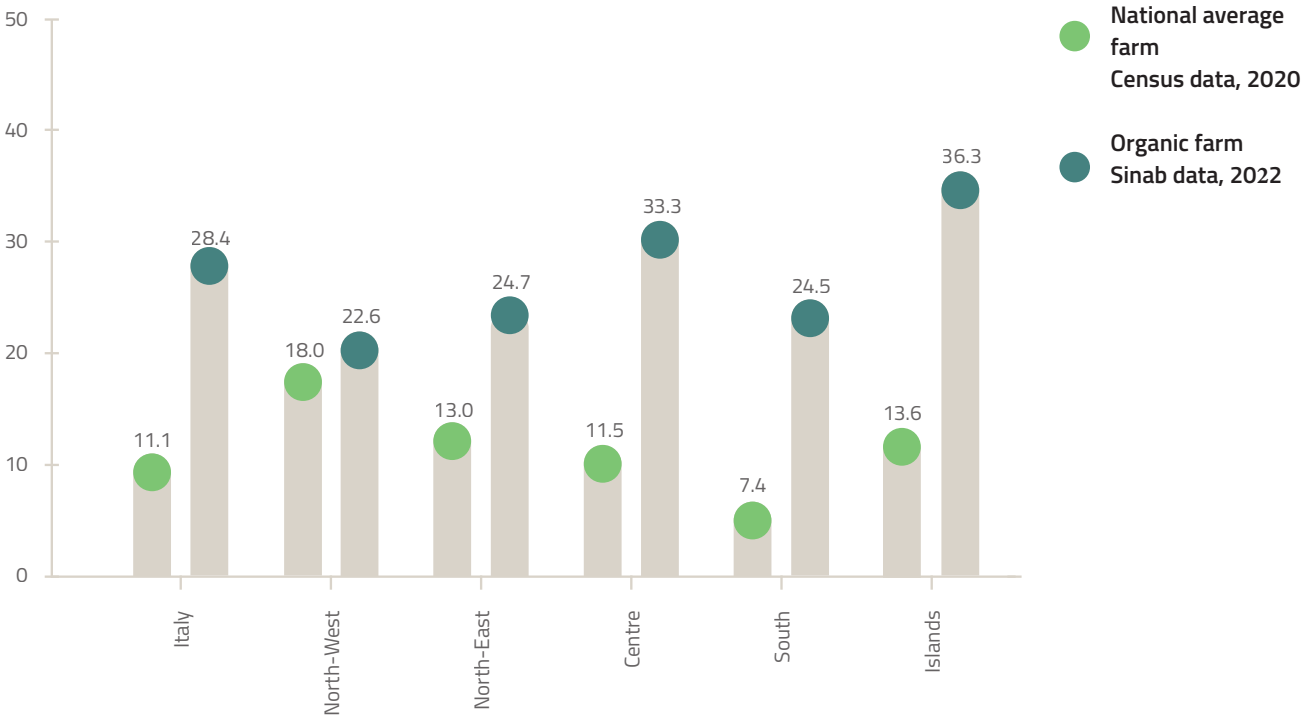
	Share of organic areas %	Share of organic farms %
ITALY	**18.7**	**7.3**
North	**9.1**	**5.6**
North-west	**5.7**	**4.5**
Piedmont	5.8	5.3
Valle d'Aosta	2.1	1.7
Liguria	16.1	3.0
Lombardy	5.4	4.3
North-east	**12.0**	**6.3**
A.P. Bolzano	6.8	7.5
A.P. Trento	12.7	7.7
Veneto	5.8	3.3
Friuli-Venezia Giulia	9.0	5.5
Emilia-Romagna	18.5	10.4
Centre	**27.8**	**9.6**
Tuscany	35.8	12.2
Umbria	16.7	6.5
Marche	26.6	11.6
Latium	25.8	7.8
South	**23.8**	**7.1**
Abruzzo	14.8	4.7
Molise	6.7	2.4
Campania	19.7	8.4
Apulia	24.9	5.6
Basilicata	25.8	9.2
Calabria	35.7	10.5
Islands	**21.7**	**8.1**
Sicily	28.8	9.2
Sardinia	13.9	4.9

Source: Compilation by SINAB on Control Bodies, Regional Authorities and General Agricultural Census data, 2020

In 2022 the average size of a typical organic farm in Italy was 28.4 hectares, meaning a large, cultivated area compared to the average 11 hectares reported for a farm at national level.

The largest organic farms were based in the Islands (36.3 hectares) and in the Centre (33.3 hectares) while the smallest were generally located in the North and South **(Chart 1.3).**

Chart 1.3
Average farm size by geographical area
2022
Hectares



Source: Compilation by SINAB on Control Bodies, Regional Authorities and General Agricultural Census data, 2020

The incidence of organic land estimated by individual macrocategories shows different values compared to the 18.7% share in the national UAA. Based on the 2020 Census, agrarian woody crops are above 18.7%, accounting for 25.6% of the total; permanent grassland follows with 21.1%, while arable crops account for 13.9%. More specifically, the incidence of organic citrus groves (31.3%) and olive groves (27.5%) is significant. Organic vineyards account for 21.3% of the total cultivated vineyards: in Italy 21.3 hectares out of 100 hectares of vineyards are organic **(Chart 1.4).**

Chart 1.4

Organic farming in Italy: Share of organic areas in the total by main crop types

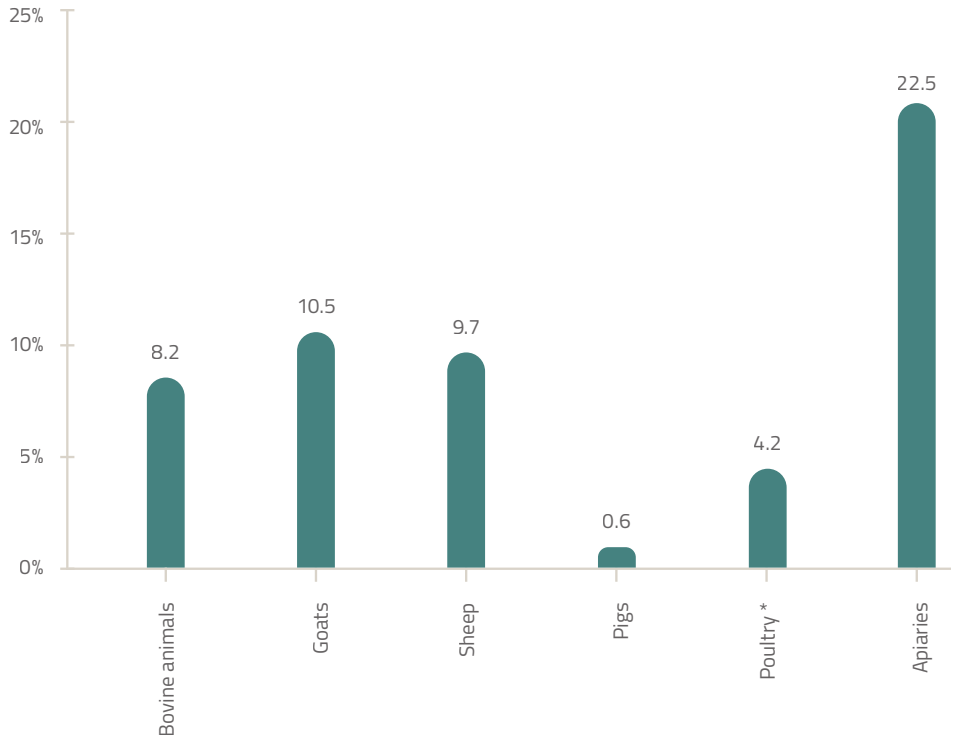
2022

Percentage values

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

The most representative livestock categories in organic animal husbandry are cattle (8.2%), goats (10.5%), and sheep (9.7%). Instead, 'organic' pigs represent a smaller share: for every 100 pigs raised in Italy, 0.6% come from an organic herd. The incidence of apiaries is significant, reaching 22.5% and showing the positive impact of organic beekeeping on the total **(Chart 1.5).**

Chart 1.5
Organic farming in Italy: share of organic in total livestock numbers
2022
Percentage values



* Includes broilers and laying hens

Source: Compilation by SINAB on Control Bodies data, 2022, from National Livestock Register and Census data, 2020

The European context*

The area under organic farming in Europe reached approximately 16 million hectares in 2021 and among the European countries, Italy, France, Spain, and Germany accounted for more than 50% of the total.
In Italy 2,349,880 hectares were certified organic in 2022, while figures for the other European countries are currently being released by the national Ministries of Agriculture.
Data collected so far indicates that France is growing slightly, with a steady +3.9% i.e., a rise of 100,000 hectares of organic UAA and just over 2,000 certified organic farms, while the share of organic UAA has reached 10.7% **(Table 1.8 and Chart 1.6).**

Table 1.8
Organic areas and organic farms in the main European countries
2020-2022
Hectares and percentage values

Organic UAA	2020	2021	2022	Share in the total UAA*
			Hectares	%
Italy	**2,094,608**	**2,186,570**	**2,349,880**	**18.7**
Spain	2,437,891	2,635,442	n.d.	11.3**
France	2,547,429	2,776,799	2,876,052	10.7
Germany	1,701,895	1,802,231	n.d.	10.8**
Austria	679,992	679,142	n.d.	26.6

Organic farms (Exclusive producers and producers/ processors)	2020	2021	2022	Annual increase*
			Number	%
Italy	**71,590**	**75,874**	**82,603**	**8.9**
Spain	44,493	52,861	n.d.	15.8**
France	53,251	58,413	60,483	3.5
Germany	35,262	36,307	n.d.	2.9**
Austria	26,407	n.d.	n.d.	/**

* 2022 data pending (available from September 2023)
** last data available

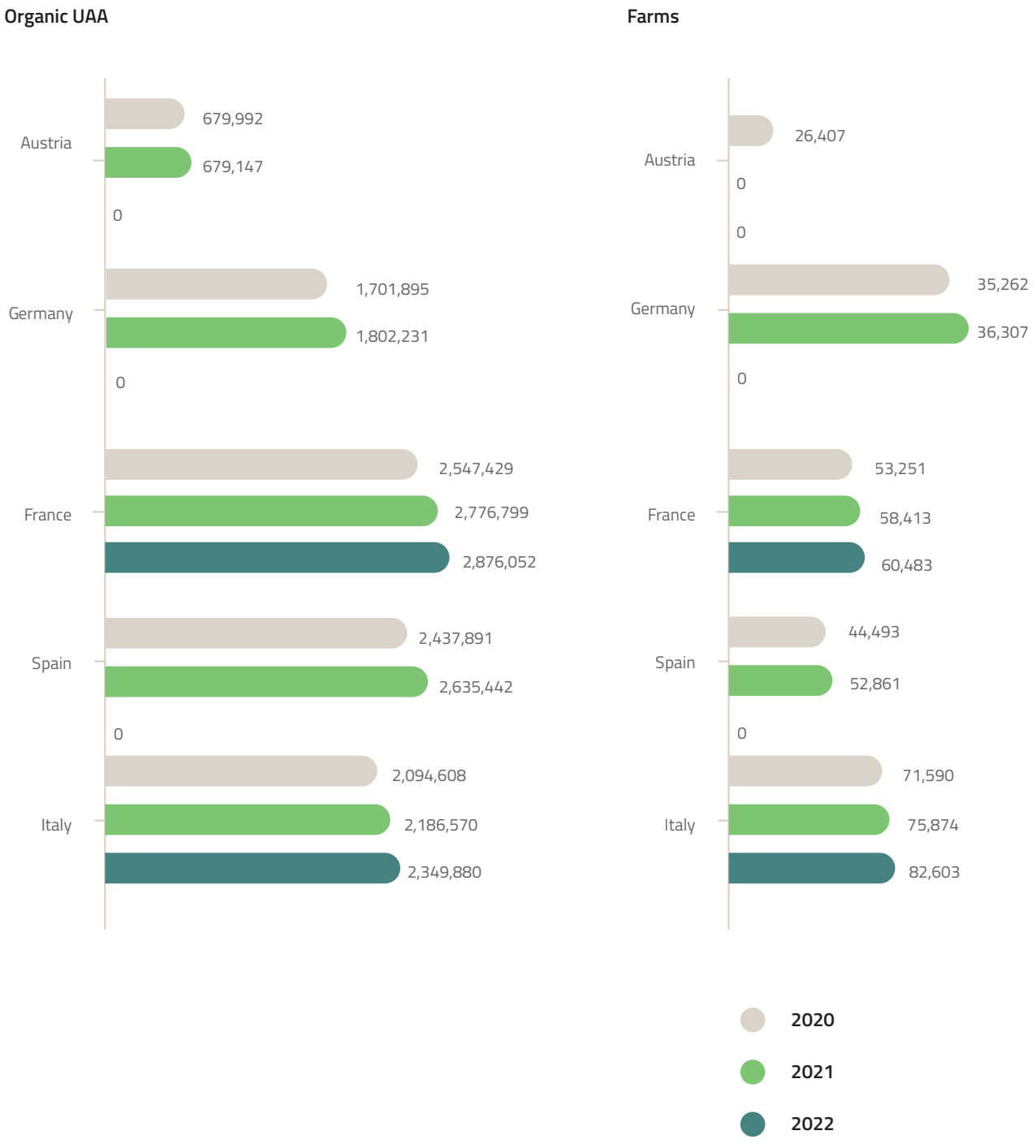
Source: Compilation by SINAB on Eurostat and Ministries of Agriculture data

Chart 1.6

Organic areas and organic farms in the main European countries

2020-2022

Hectares and number



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

OPERATORS

Administrative and statistical data compilation

Fabiana Crescenzi

ORGANIC OPERATORS IN ITALY

Overview of 2022

An analysis of national data on operators, completed on 31 December 2022, showed that the organic sector is growing successfully, despite the highly unstable context over the last few years. In 2022 there were more than 92,000 certified organic operators i.e., a 7% increase which consolidated the upward trend started in 2010.
The new accessions to organic certification (+ 6,655 units) in 2022 led to a new balance of the sector categories. Exclusive producers, i.e., the farmers, and producers/processors reached 68,605 and 13,998 units respectively, with the most significant percentage increase of +10.1% and +3.6%. Importers likewise grew, although to a lesser extent (+0.5%), totalling more than 580 units in 2022, while exclusive processors dropped slightly (-1.1%), after several years of steady growth **(Table 2.1).**

Table 2.1
Organic operators by category in Italy
2021 and 2022
Number and percentage values

	Organic operators		Percentage change 2022/2021
	2021	2022	%
TOTAL	**86,144**	**92,799**	**7.7**
Exclusive producers	62,333	68,605	10.1
Exclusive processors	9,718	9,614	-1.1
Producers / Processors	13,514	13,998	3.6
Importers*	579	582	0.5

*'Importers' include exclusive importers and importers who also carry out production and/or processing activities

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

The regional distribution of operators shows that Sicily still leads the way with 14,072 operators, followed by Apulia and Calabria with 11,408 and 10,442 operators. These three regions together account for almost 40% of national organic operators **(Table 2.2 and Infographic 2.1).** Sicily and Apulia contributed significantly to the percentage increase reported by the category of national exclusive organic producers, with a positive percentage change over 2021 of 35.3% and 31.6%, respectively.
Other regions also showed an interesting increase compared to 2021, including Sardinia with +10.9% and Piedmont with +6.9%, followed by Lombardy with +5.9% and Marche +5.6% **(Chart 2.1).**

Table 2.2

Regional distribution of organic operators by category in Italy

2021 and 2022

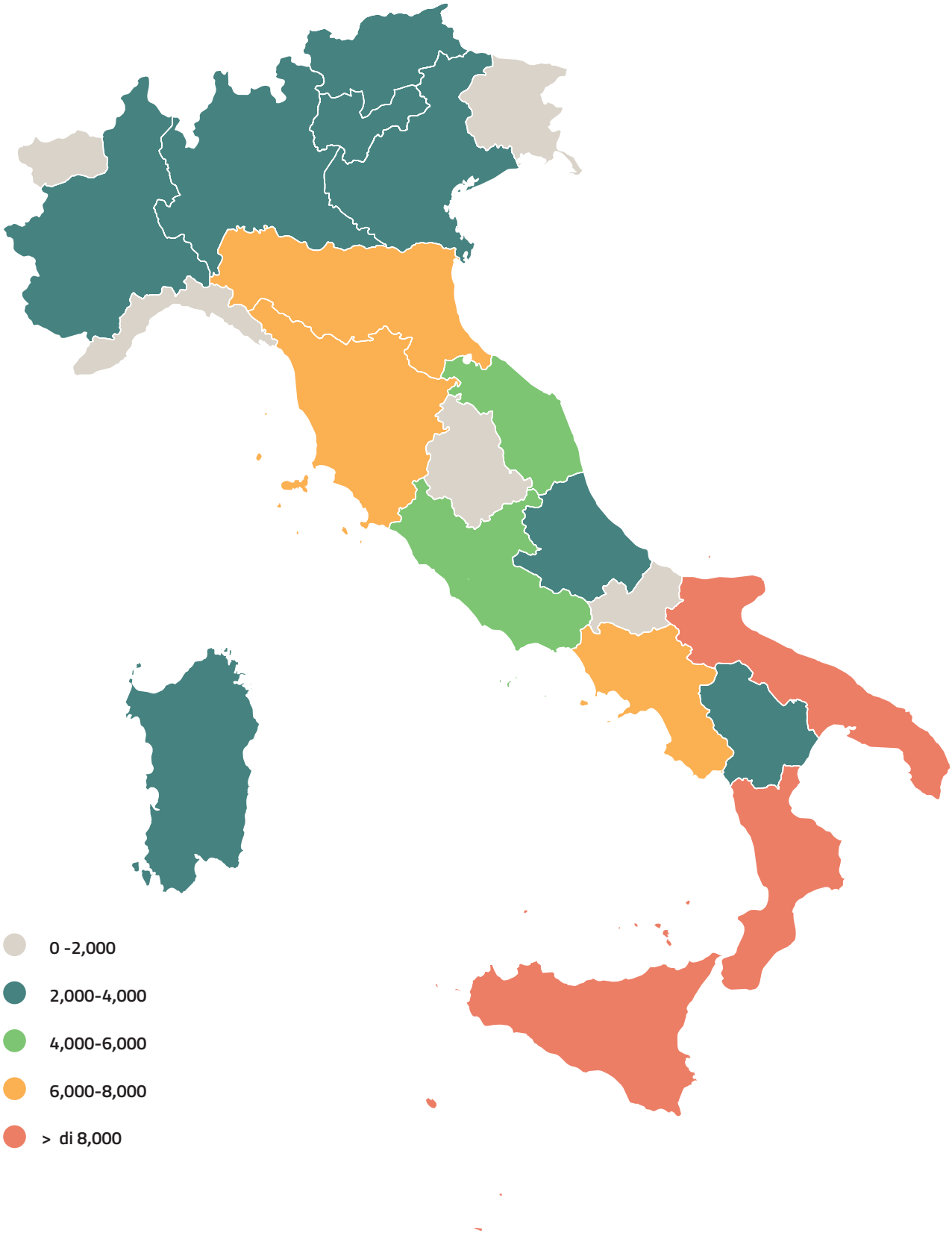
Number and percentage values

	Operators 2021					Operators 2022	Percentage change 2022/2021
	Total	Exclusive producers	Producers / Processors	Exclusive processors	Importers*	TOTAL	%
ITALY	**86,144**	**68,605**	**13,998**	**9,614**	**582**	**92,799**	**7.7**
A.P. Bolzano	1,841	1,358	143	337	17	1,855	0.8
A.P. Trento	1,289	919	178	155	4	1,256	-2.6
Abruzzo	2,310	1,690	382	299	3	2,374	2.8
Apulia**	9,232	9,198	1.460	734	16	11,408	23.6
Basilicata	3,133	2,975	148	111	0	3,234	3.2
Calabria	10,400	8,156	1,914	363	9	10,442	0.4
Campania	7,205	6,093	550	638	41	7,322	1.6
Emilia-Romagna**	6,466	4,753	827	1,047	72	6,699	3.6
Friuli-Venezia Giulia	1,109	709	196	211	9	1,125	1.4
Latium	5,695	4,419	738	505	24	5,686	-0.2
Liguria	546	280	109	150	23	562	2.9
Lombardy	3,078	1,482	525	1,127	126	3,260	5.9
Marche**	4,000	3,341	586	289	8	4,224	5.6
Molise	506	356	79	78	2	515	1.8
Piedmont**	3,215	2,052	691	633	62	3,438	6.9
Sardinia	2,202	2,125	185	131	0	2,441	10.9%
Sicily	11,128	10,972	2,120	947	33	14,072	26.5%
Tuscany	6,974	4,318	2,069	662	40	7,089	1.6%
Umbria	1,875	1,356	390	182	11	1,939	3.4%
Valle d'Aosta	54	29	13	26	0	68	25.9%
Veneto**	3,886	2,024	695	989	82	3,790	-2.5%

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

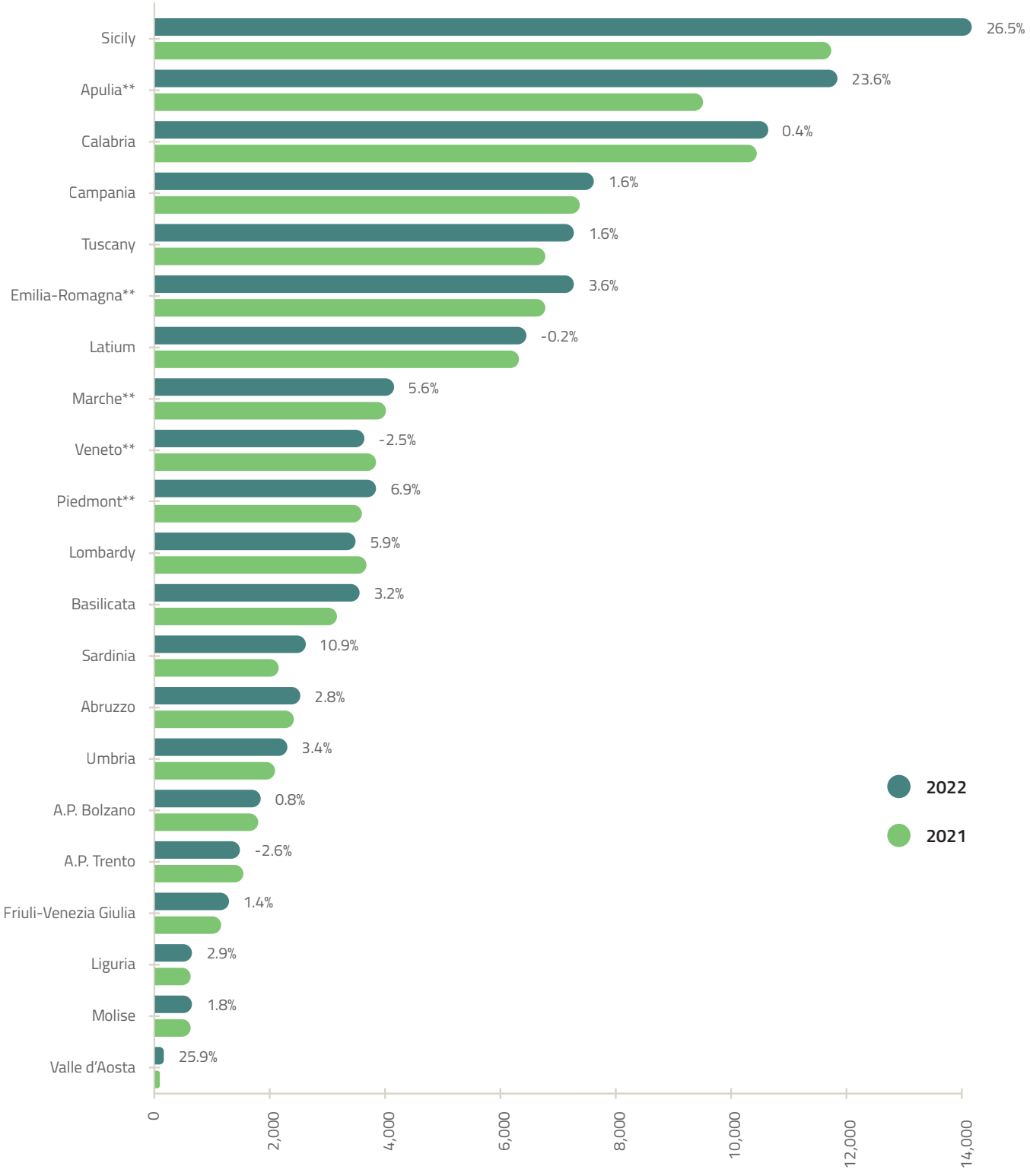
Source: Compilation by SINAB on Control Bodies, Regional Authorities and SIB data

Infographic 2.1
Regional distribution of organic operators in Italy
2022
Number



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

Chart 2.1
Regional variation of organic operators in Italy
2021 and 2022
Percentage values

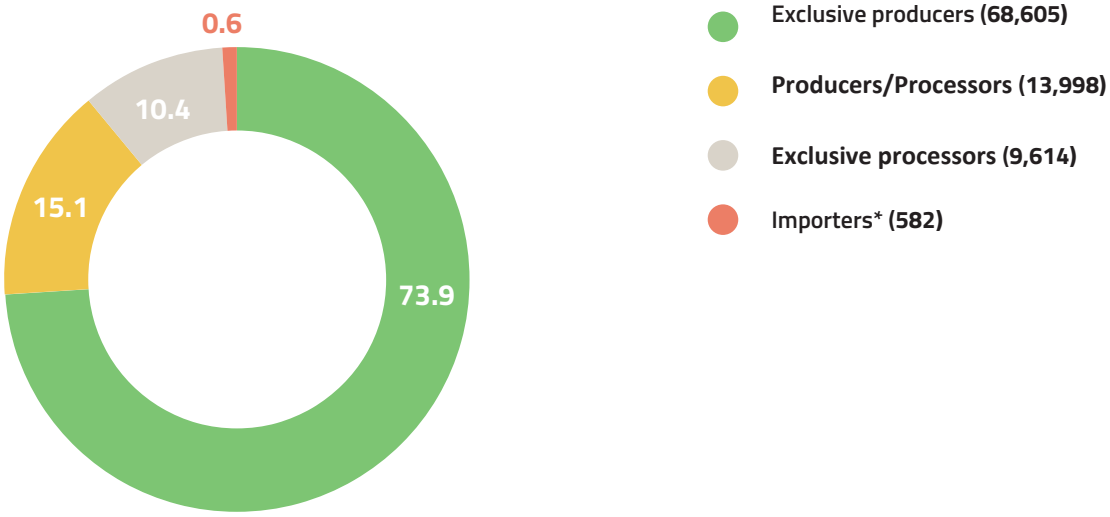


**Data are provided by the Regional Authorities

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

Considering the incidence of each category of organic operators on the national total operators, exclusive processors stand out with a higher growth rate, gaining almost two percentage points over the other two categories **(Chart 2.2).**

Chart 2.2
Share of different categories of organic operators in Italy
2022
Percentage values



* 'Importers' include exclusive importers and importers who also carry out production and/or processing activities

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

As mentioned earlier, in 2022, importers recorded an overall increase of only 3 units, and they were mostly concentrated in the Central-Northern Italian regions. Lombardy takes the lead with a total of 126 importers, followed by Veneto and Emilia-Romagna with 82 and 72 operators respectively **(Table 2.3 and Infographic 2.2).**

Table 2.3

Regional distribution of organic importers by category in Italy

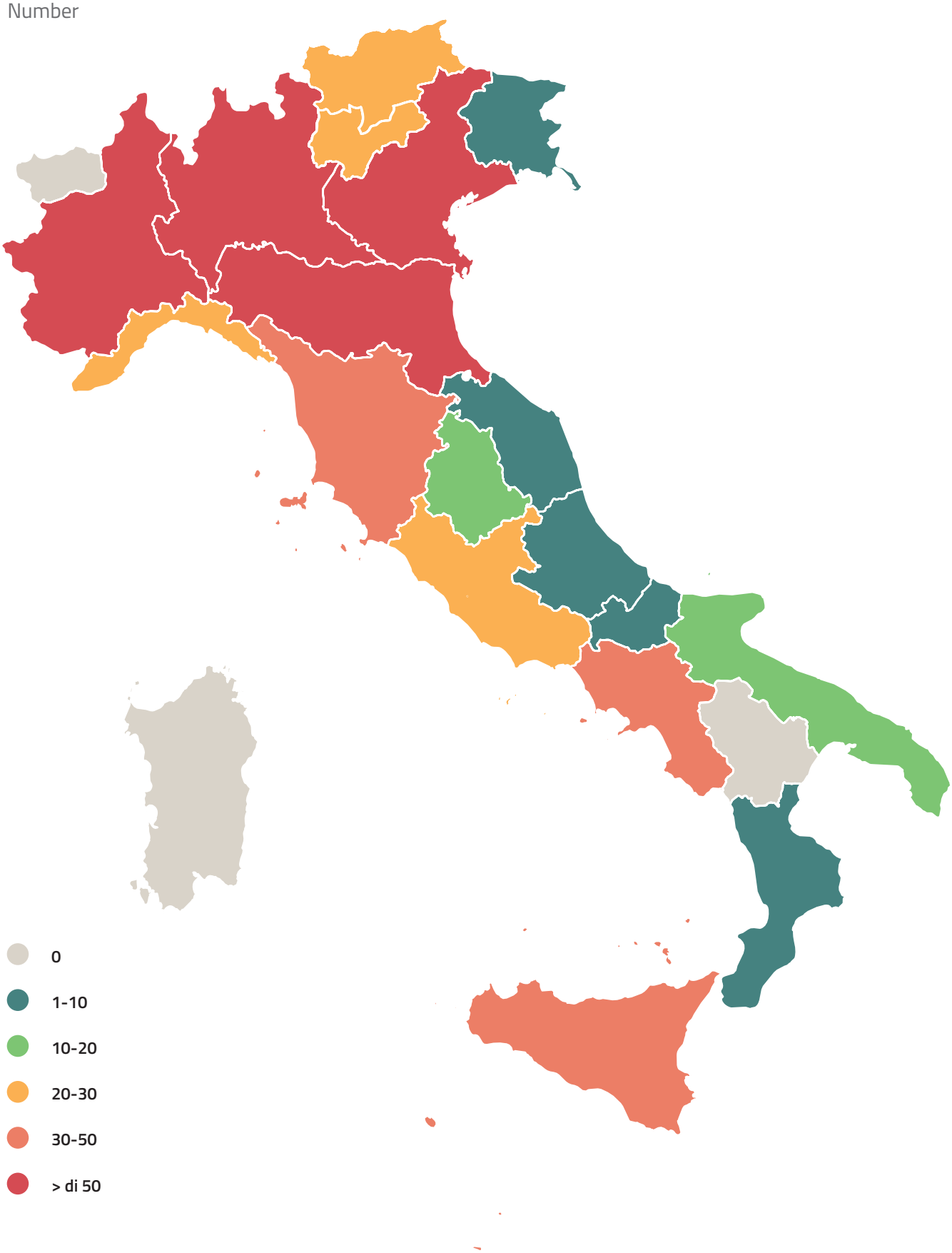
2022

Number and percentage values

	Exclusive importers (C)	Producers who are also Importers (AC)	Processors who are also Importers (BC)	Producers who are also Processors and Importers (ABC)	Total 2022	2021	% Change 2022/2021
A. P. Bolzano	0	0	17	0	17	18	-5.6
A.P. Trento	0	0	4	0	4	3	33.3
Abruzzo	0	0	3	0	3	3	0.0
Apulia	0	0	15	1	16	15	6.7
Basilicata	0	0	0	0	0	0	0.0
Calabria	0	0	7	2	9	8	12.5
Campania	0	0	40	1	41	36	13.9
Emilia-Romagna	1	0	67	4	72	76	-5.3
Friuli- Venezia Giulia	1	0	8	0	9	10	-10.0
Latium	1	0	22	1	24	23	4.3
Liguria	0	1	22	0	23	25	-8.0
Lombardy	0	0	125	1	126	127	-0.8
Marche	0	0	7	1	8	11	-27.3
Molise	0	0	2	0	2	2	0.0
Piedmont	0	0	57	5	62	64	-3.1
Sardinia	0	0	0	0	0	0	0.0
Sicily	0	0	31	2	33	31	6.5
Tuscany	0	0	38	2	40	41	-2.4
Umbria	0	0	11	0	11	11	0.0
Valle D'Aosta	0	0	0	0	0	0	0.0
Veneto	0	1	79	2	82	75	9.3
Total	**3**	**2**	**555**	**22**	**582**	**579**	**0.5**

Source: Compilation by SINAB on SIB data

Infographic 2.2
Total organic importers in Italy
2022
Number

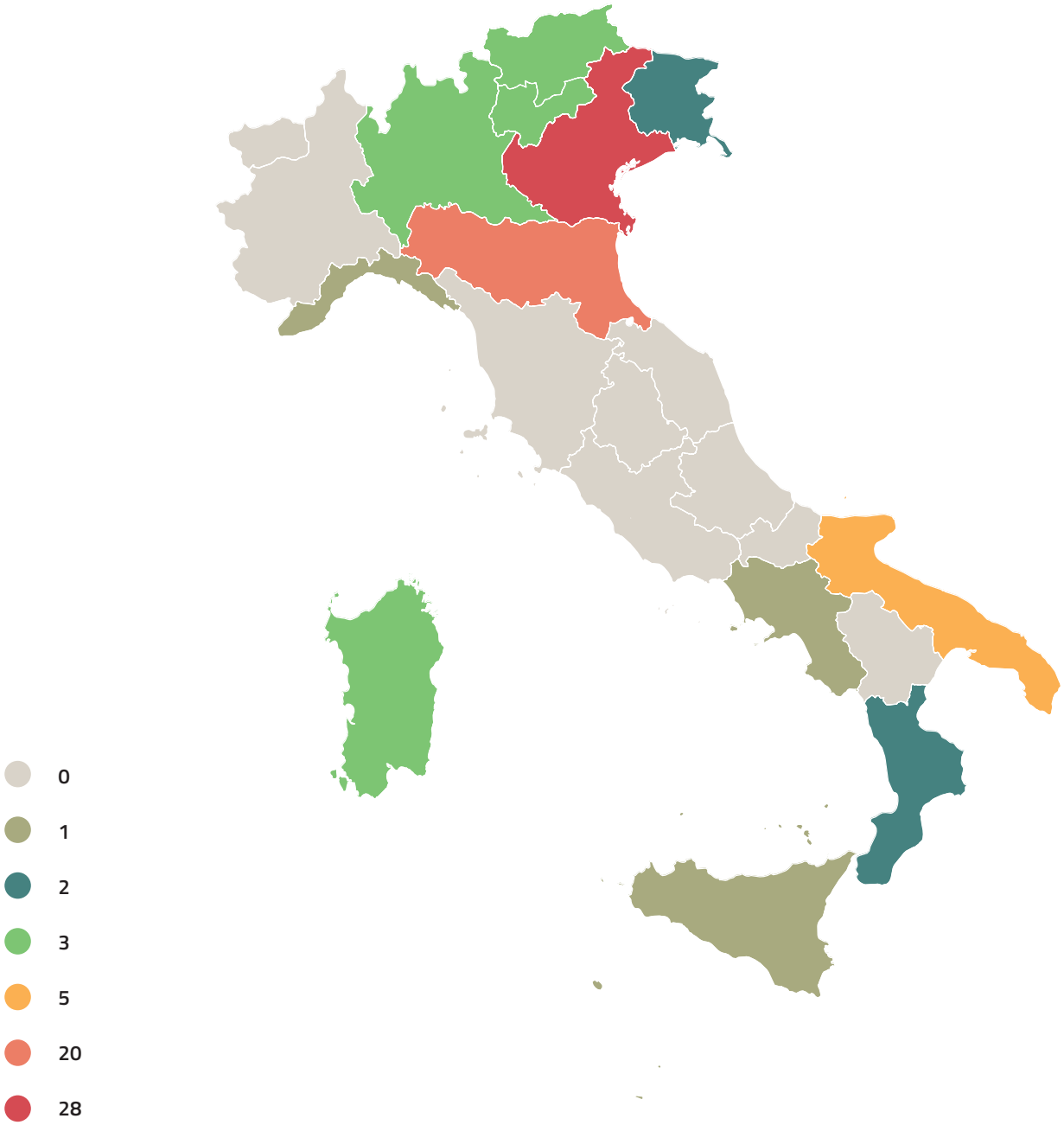


Source: Compilation by SINAB on SIB data

Organic aquaculture

The organic aquaculture industry slowed down in 2022, with a slight decrease (- 1.4%) in the number of active operators. Veneto (28 operators) and Emilia-Romagna (20 operators) still led the way for the highest number of farms, although they both faced a reduction of 2 operators compared to last year. Mussel and shellfish farming prevail in the two regions whereas the South mostly rely on sea bass and sea bream farming. In the remaining regions many farms specialise in algae production **(Infographic 2.3).**

Infographic 2.3
Organic aquaculture farms in Italy
2022
Number



Source: Compilation by SINAB on SIB data

Agricultural holdings

In 2022 in Italy, agricultural holdings represented 89% of all organic operators. A breakdown of incidence by geographical areas shows that only in the North values are below the national average, while in the Centre, South and Islands values are significantly higher.

Considering the percentage changes of organic farms, the South and the Islands performed the best, with an increase of 8.5% and 26.5% respectively over 2021. Organic farms in the Centre and North also grew, although to a lesser extent **(Table 2.4).**

Table 2.4
Agricultural holdings and organic operators by geographical areas in Italy
2021 and 2022
Number and percentage values

	Agricultural Holdings					
	2021	2022	% Change 2022/2021	Agricultural holdings 2022	Total organic operators 2022	% Share of agricultural holdings in organic operators 2022
North-west	4,814	5,188	7.8	5,188	7,328	70.8
North-east	11,638	11,809	1.5	11,809	14,725	80.2
Centre	16,817	17,221	2.4	17,221	18,938	90.9
South	30,425	33,005	8.5	33,005	35,295	93.5
Islands	12,180	15,404	26.5	15,404	16,513	93.3
ITALY'S TOTAL	75,874	82,627	8.9	82,627	92,799	89.0

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

The South and the Islands take the lead thanks to the expansion of organic operators recorded in Apulia and Sicily, where the number of organic farms has also grown significantly, by 26.9% and 29.5% **(Table 2.5 and Infographic 2.4).**

Table 2.5

Percentage change in agricultural holdings and total organic operators: regional distribution

2022 and 2021

Percentage values

	% Change 2022/2021 - Total operators	% Change 2022/2021 - Agricultural holdings
ITALY	**7.7**	**8.9**
Abruzzo	2.8	3.3
Basilicata	3.2	3.5
Calabria	0.4	0.6
Campania	1.6	1.2
Emilia-Romagna**	3.6	4.9
Friuli-Venezia Giulia	1.4	1.1
Latium	-0.2	-0.2
Liguria	2.9	4.8
Lombardy	5.9	8.4
Marche**	5.6	5.6
Molise	1.8	2.1
A.P. Bolzano	0.8	0.2
A.P. Trento	-2.6	-3.1
Piedmont**	6.9	8.0
Apulia**	23.6	26.9
Sardinia	10.9	11.6
Sicily	26.5	29.5
Tuscany	1.6	2.3
Umbria	3.4	3.7
Valle d'Aosta	25.9	-6.7
Veneto**	-2.5	-2.4

** Data are provided by Regional Authorities

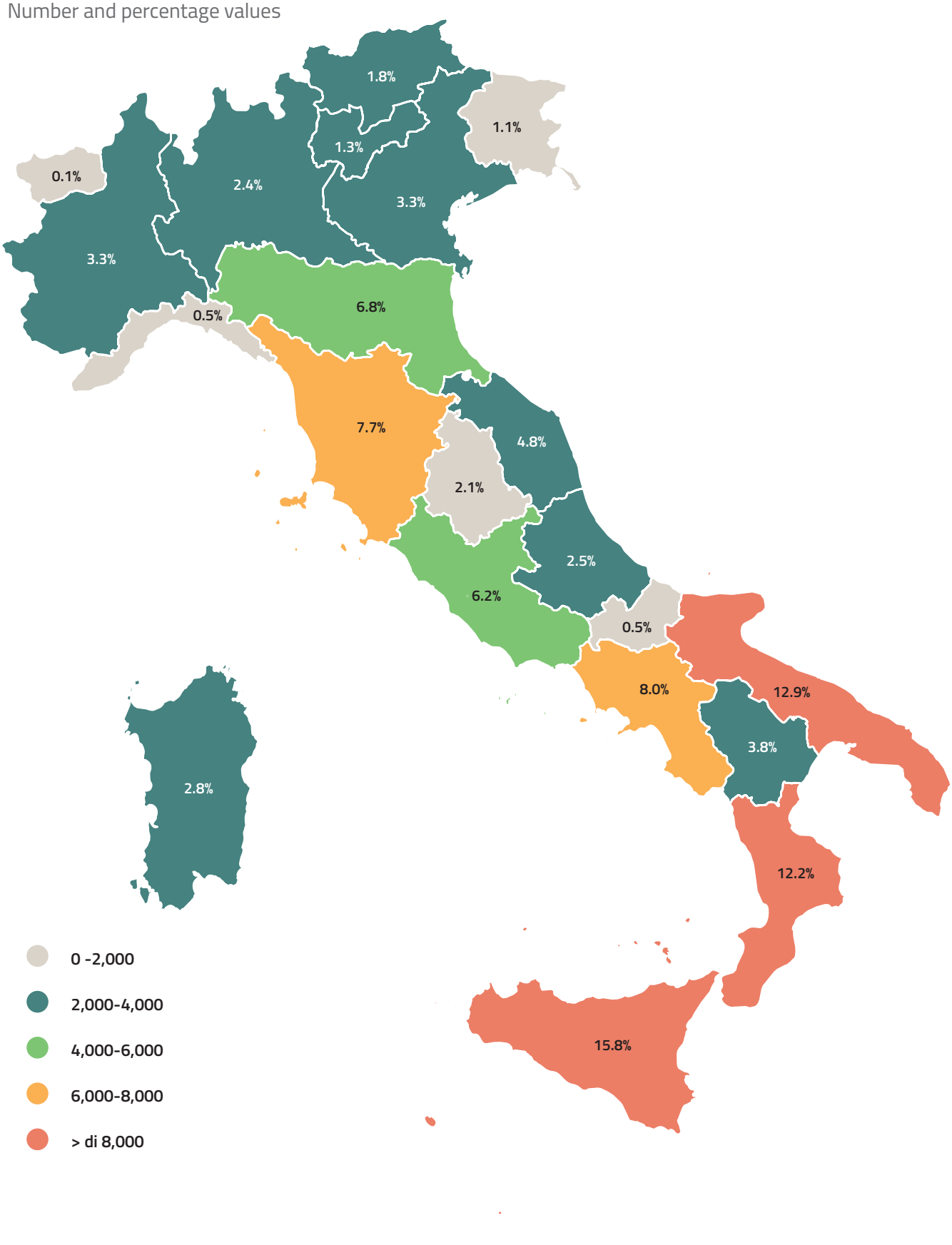
Source: Compilation by SINAB on Control Bodies, Regional Authorities and SIB data

Infographic 2.4

Organic farms (including producers/processors) and share in the national total

2022

Number and percentage values



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

Organic farms: a comparison with the past

In the last three years an upward trend has been reported for organic operators in Italy, reflected by a slight but steady percentage increase. Organic agriculture has maintained this positive trend throughout the period 2010-2022. **Chart 1.2** (Chapter 1), which outlines the industry's historical development since 1990, clearly illustrates what is described in Table 2.6: overall, Italian organic operators have grown by 94.7% (+ 45,136 units), with a significant percentage increase (+347.5%) in the category of producers/processors.
This growth was not homogeneous across the country. **Chart 2.3** clearly shows that Southern Italian regions made a great contribution to the expansion of the national industry, followed by the Centre, the Islands and finally the North.

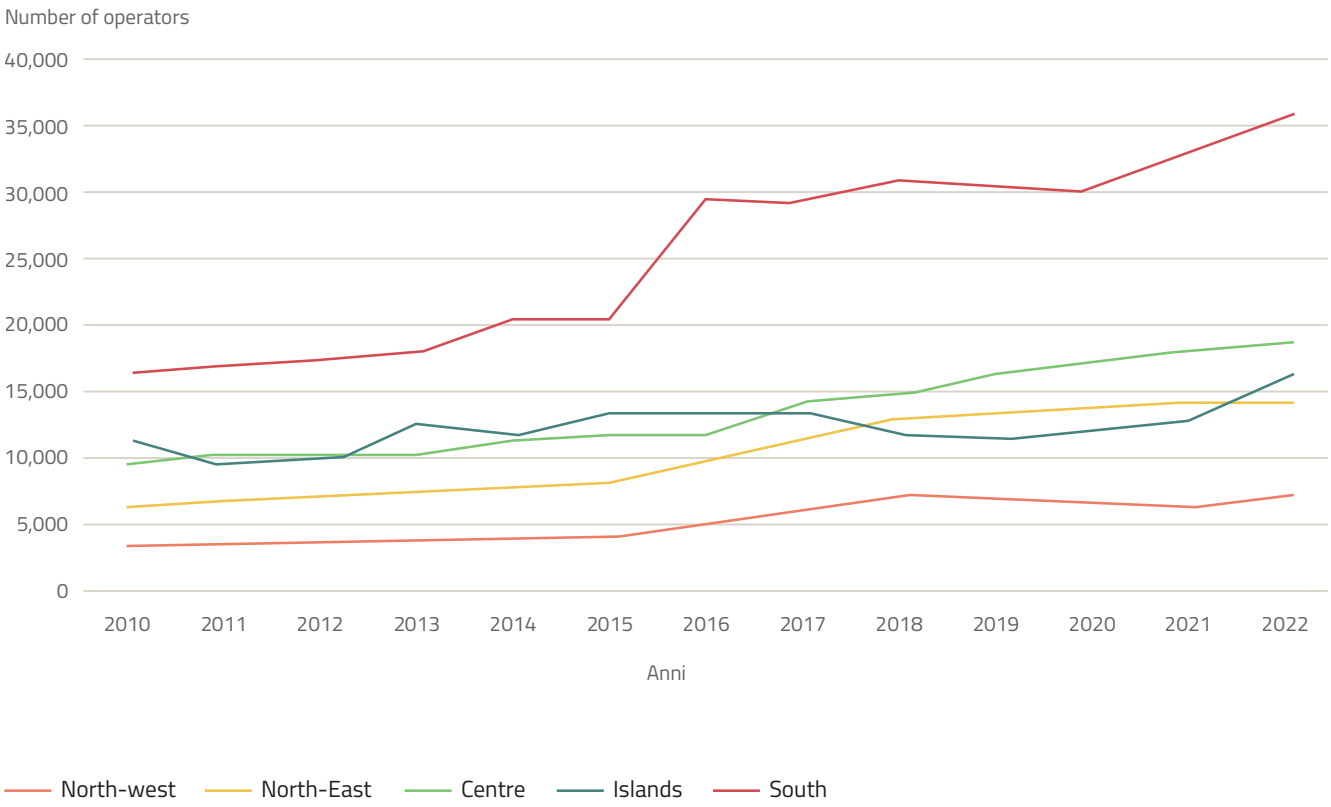
Table 2.6
Organic operators by category in Italy
2010 and 2019 - 2022
Number and percentage values

	Number of operators				2022/2021		2022/2010	
	2010	2020	2021	2022	% Change	Diff. in number	% Change	Diff. in number
Exclusive producers	38,679	59,035	62,333	68,605	10.1	6,272	77.4	29,926
Exclusive processors	5,592	9,618	9,718	9,614	-1.1	-104	71.9	4,022
Producers / Processors	3,128	12,534	13,514	13,998	3.6	484	347.5	10,870
Importers*	264	544	579	582	0.5	3	120.5	318
TOTAL	47,663	81,731	86,144	92,799	7.7	6,655	94.7	45,136

* 'Importers' include exclusive importers and importers who also carry out production and/or processing activities

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

Chart 2.3
Evolution of operators by geographical areas
2010-2022
Number



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

MARKET AND CONSUMPTION

Statistical data processing and analysis

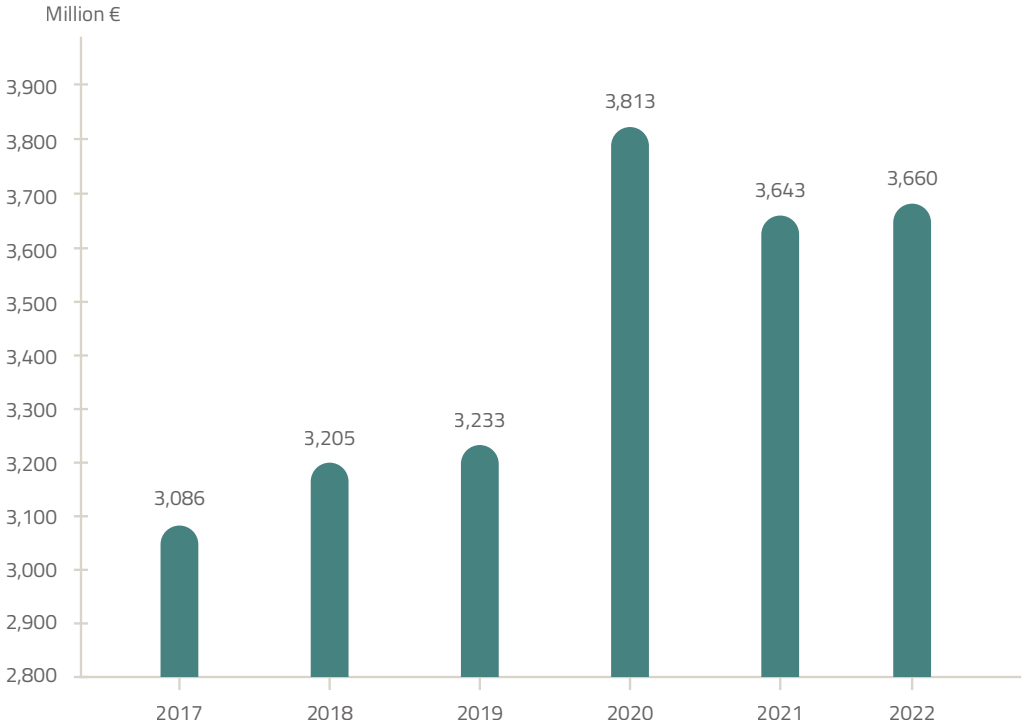
Veronica Cecchini
Nicola Gennari
Riccardo Meo

THE MARKET: DEMAND FOR ORGANIC PRODUCTS

2022: an overview

In Italy, the value of the domestic market for organic products grows by 0.5% in 2022 compared to the previous year, reaching EUR 3.66 billion. While the figure shows that organic consumption is recovering after a decline in 2021(-4.6%), it does not meet the expectations of the sector's players: the organic market is growing at a slower rate than total agribusiness (+6.4 %), and the increase does not cover agribusiness price inflation of 9.1% in 2022 **(Chart 3.1)**.
The only fair economic performance of the organic sector comes out even when analysing the share of organic sales in Italian agribusiness spending, which drops to 3.6 %, (-0.3 % in 2021). The snapshot of the value of the organic market is updated to 31 December 2022.

Chart 3.1
Domestic organic market value
2017-2022
Values in Mln €

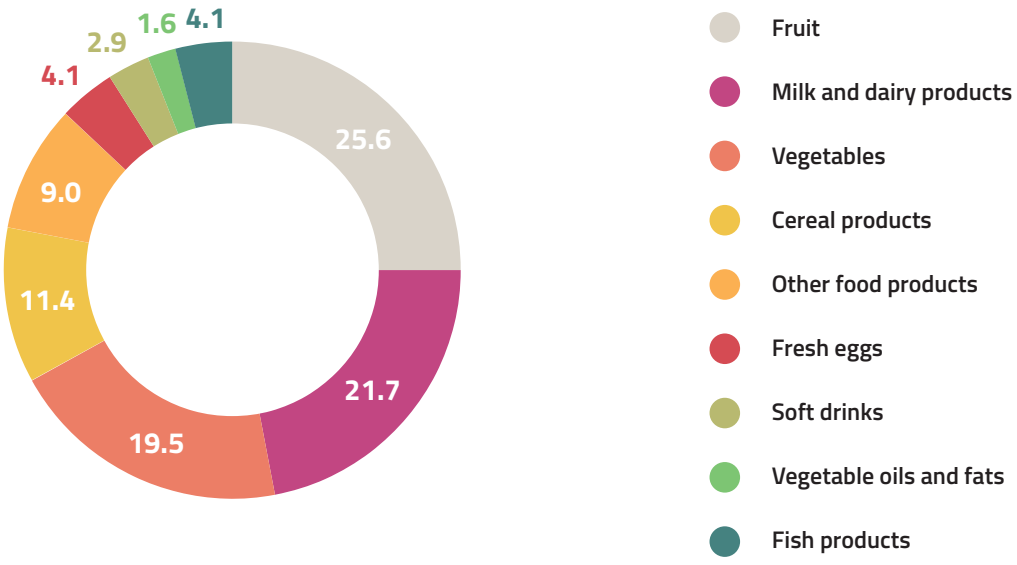


Source: Compilation by Ismea on Nielsen data
Data reflects Nielsen database sample expansion and new stratification

The organic spending

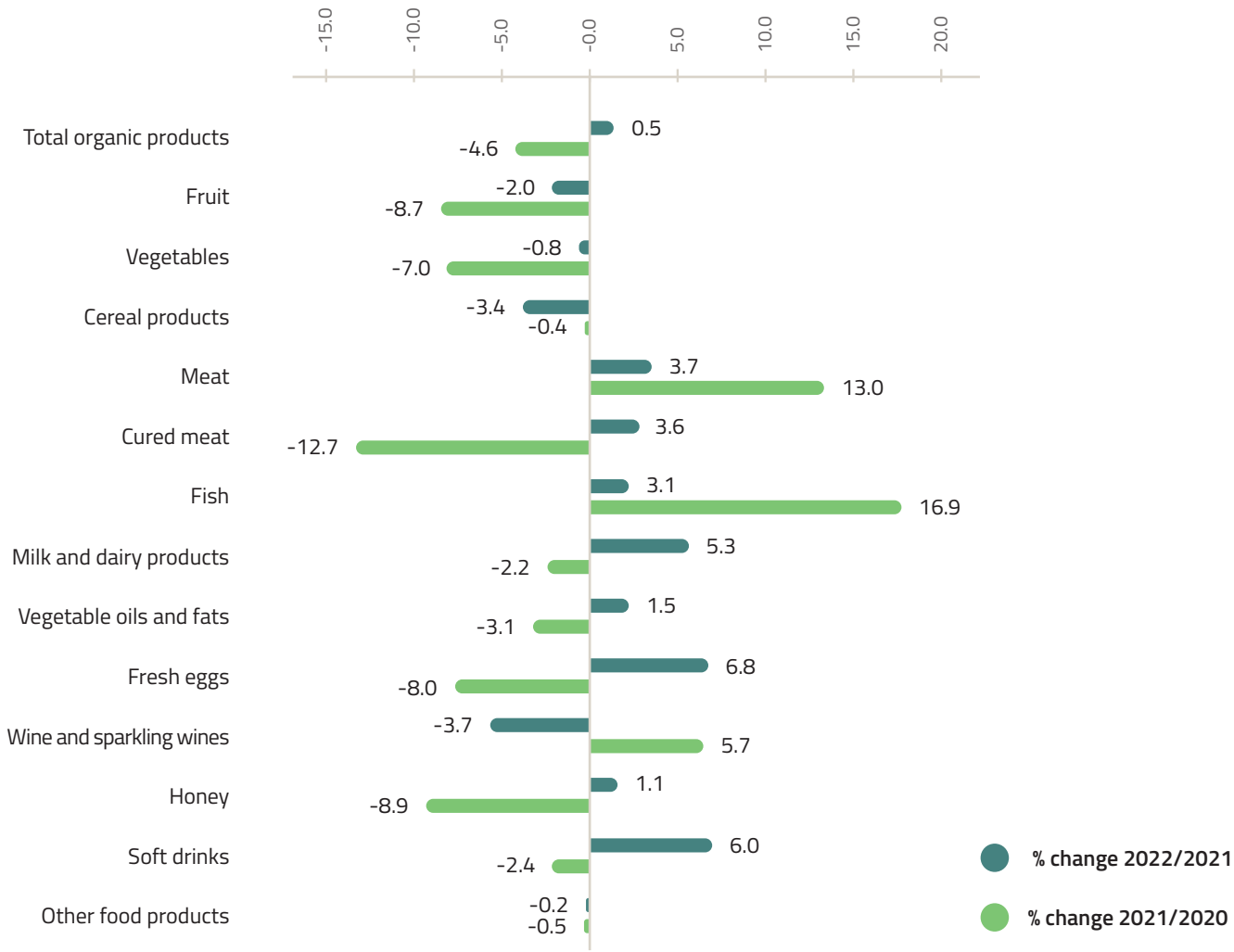
The breakdown of overall organic expenditure between the different product categories remains similar to previous years, although higher raw material prices have affected some products more than others. The consumer value of the fruit and vegetables sector continues to lead the other product categories, with a share of 45.1%. The organic shares for dairy and cheese and cereals, pasta and other derivatives sectors are also important, accounting for 21.7% and 11.4% respectively of the total value **(Chart 3.2).**
Despite the general stagnation, however, the positive performance of some product categories should be noted, such as fresh eggs (+6.8%), driven by consumer interest in a product whose purchase price is not too far from its conventional equivalent and whose product range is highly diversified. Purchases of fish products (+3.1%) and fresh and processed meat (+3.7%) are also growing, while spending continues to slow down, as in 2021, in the sectors where organic is most represented such as fruit and vegetables (-2.8%) and cereal derivatives (-3.4%). Finally, a significant drop in purchases of organic wine and sparkling wine is reported compared to 2021 (-3.7%) **(Chart 3.3).**
By the end of 2022, comparing organic consumption in the large retail trade with the overall agri-food sector trends, a two-speed market behaviour can be observed, with slower growth trends in organic categories compared to their conventional counterparts **(Chart 3.4).**

Chart 3.2
Breakdown of organic spending by sector
2022
Percentage share



Source: Compilation by Ismea on Nielsen data

Chart 3.3
Organic spending trends
2022/2021 and 2021/2020
Percentage values



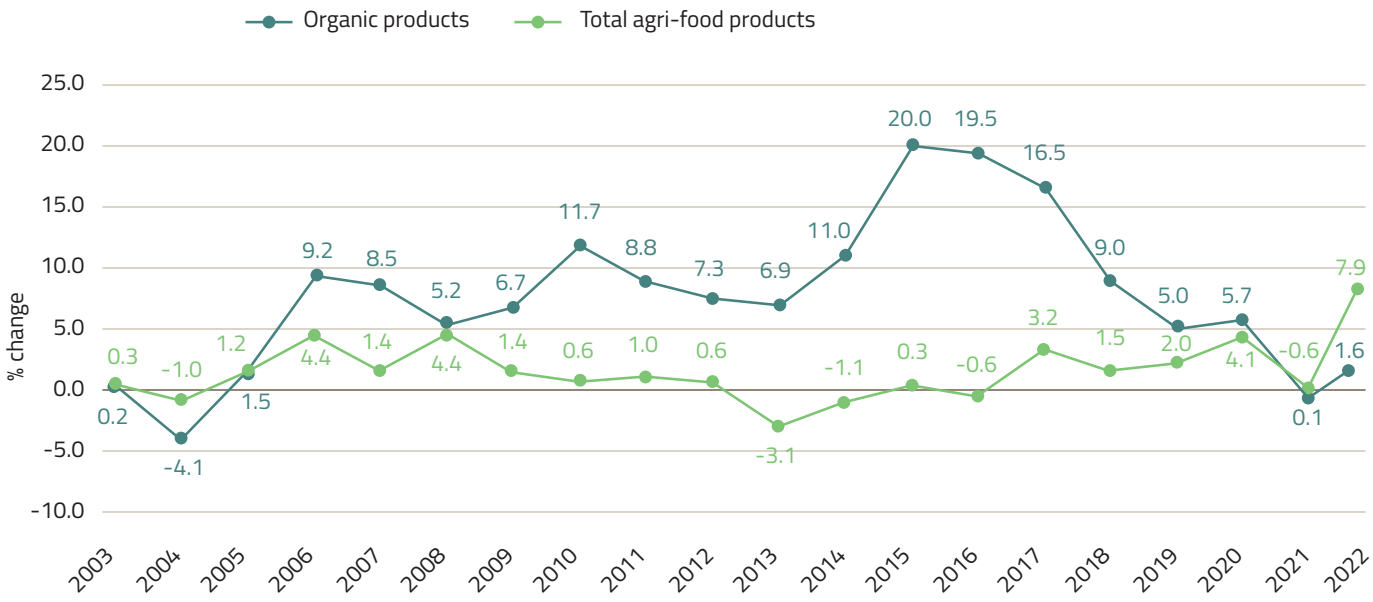
Source: Compilation by Ismea on Nielsen data

Chart 3.4

Time series of organic consumption in large-scale retail trade compared to total agri-food trend

2003-2022

Percentage change values

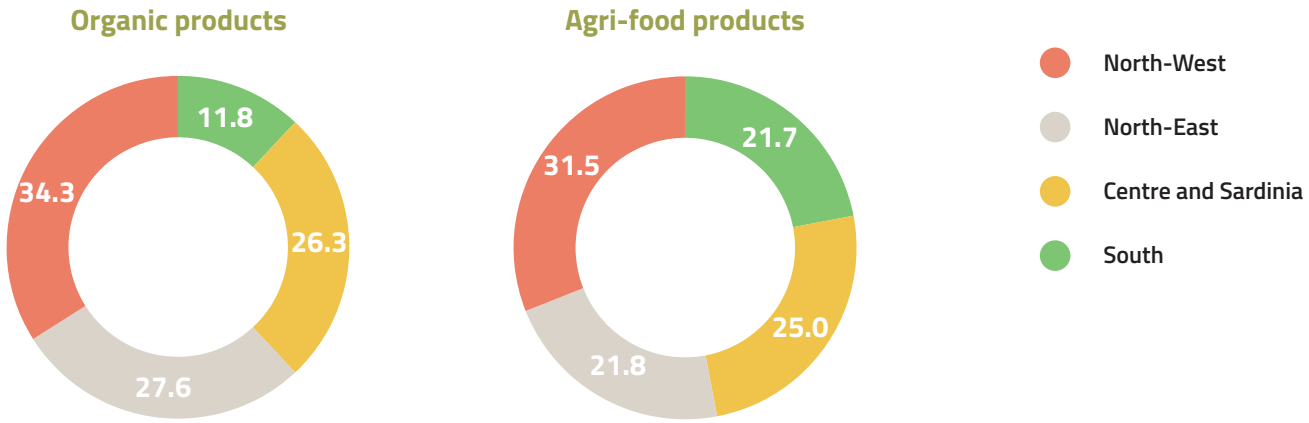


Source: Compilation by Ismea on Nielsen and Ismea -GFK Eurisko Panel data

Geographical distribution of spending in the large-scale retail trade

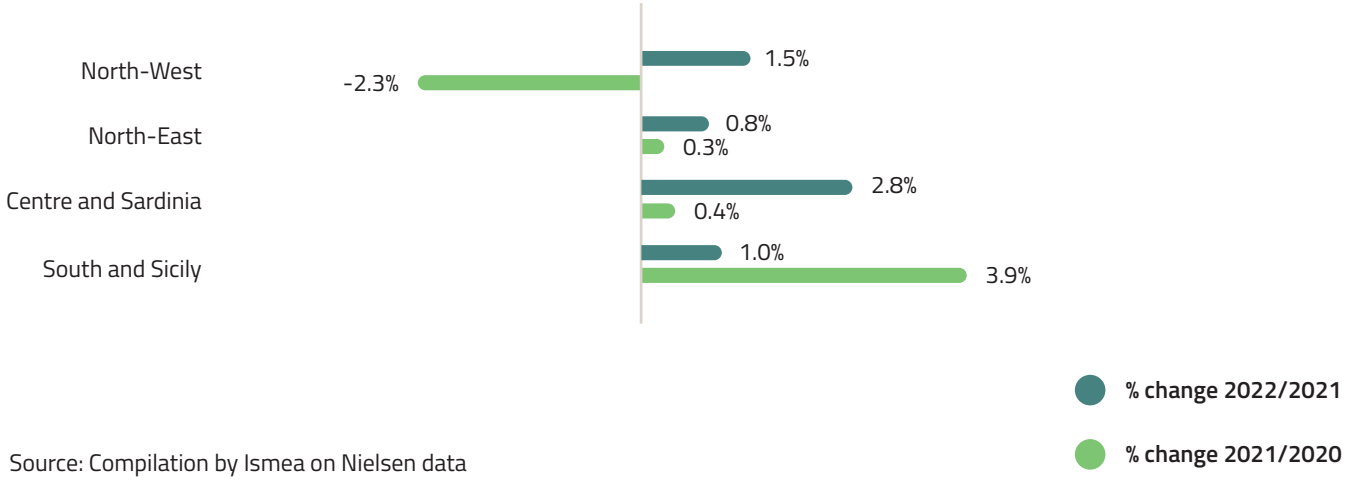
Estimates of organic consumption in 2022 show a slight increase throughout Italy. Central Italy shows the highest increases (+2.8% compared to 2021), while the variations in the other territorial macro-areas are less significant **(Chart 3.5)**. Looking at the concentration of sales, however, the north of the country stands out, as it has done for many years now, where more than 60% cent of the domestic organic market turnover is generated. In the south of Italy, the value of organic products sold is at a much lower level (11.8%), and shows, among other things, only a slight uptrend and is very far cry from the +3.9% increase recorded in 2021 (**Graphs 3.5 and 3.6**).

Chart 3.5
Geographical distribution of organic sales in large-scale retail trade and comparison with agri-food products
2022
Percentage share values



Source: Compilation by Ismea on Nielsen data

Chart 3.6
Geographical distribution and organic spending trend for fixed-weight products in large-scale retail trade
2022/2021 and 2021/2020
Percentage change values

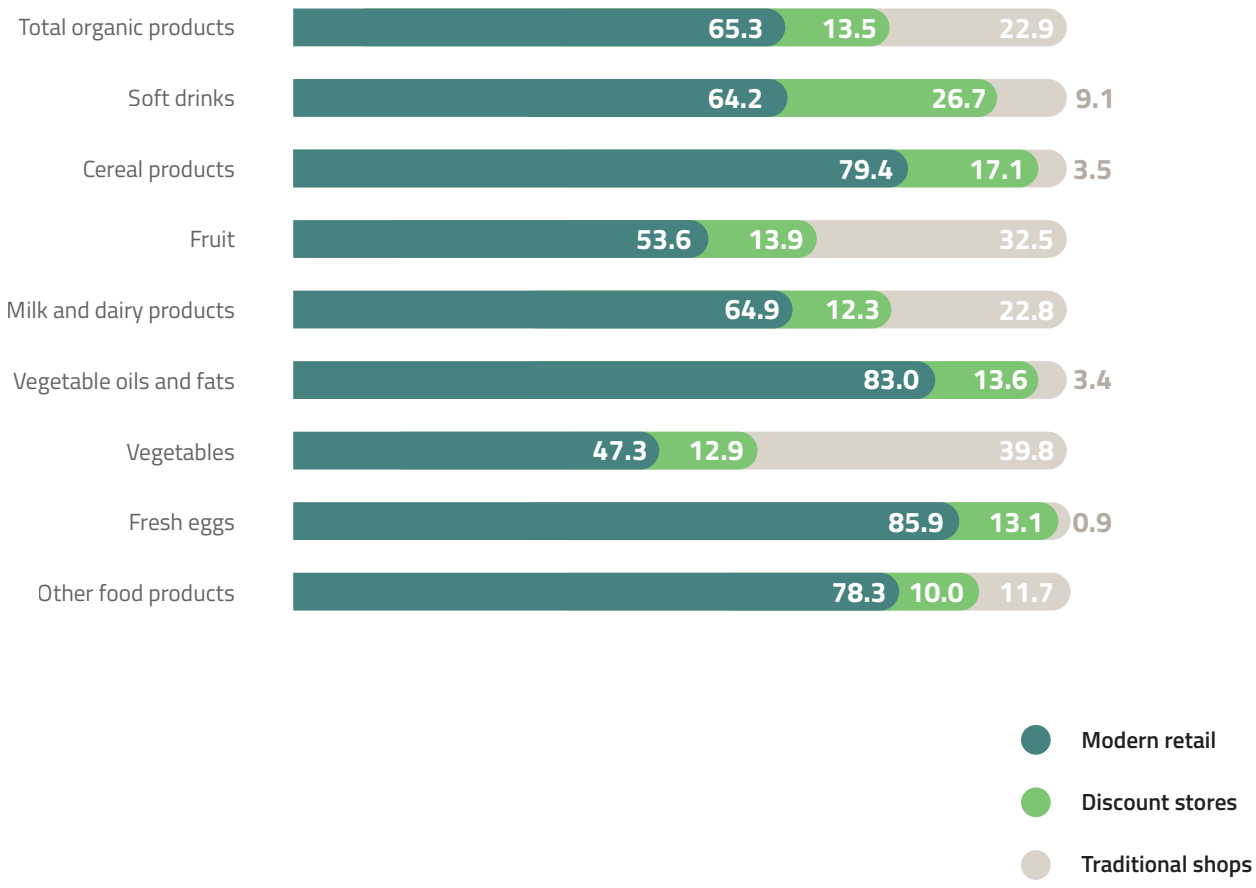


Source: Compilation by Ismea on Nielsen data

Sales channels

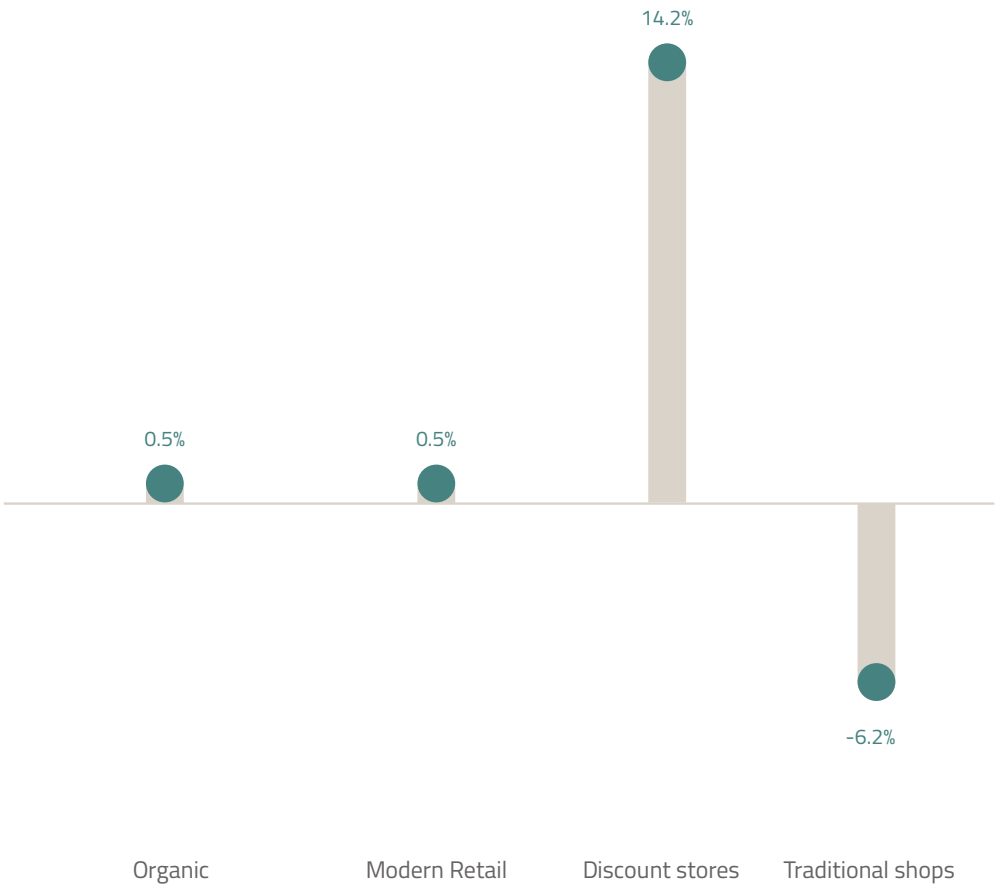
The organic market is still driven by large-scale retail (Super and Hypermarkets), which confirms its lead, with a share of 63.5%, showing a trend reversal (+0.5%), compared to the 2021 estimate that had shown a 3.6% decrease.
The share of the sales share in Discount stores is 13.5%, which remains the only channel where the consumer value of organic items is growing significantly (+14.2%).
The increase in organic spending through Discount stores is partly linked to inflation, which has had a strong impact on the reduced purchasing power of Italian consumers, forcing them to rethink their preferences in purchasing channels and pay more and more attention to the shelf price.
The traditional shop channel, which mainly includes chains specialising in the sale of organic products, continues to show signs of disruption with a 6.2 per cent drop in sales and a market share of 22.9 per cent, down more than two percentage points decrease compared to 2021 **(Charts 3.7 and 3.8).**

Chart 3.7
Breakdown of organic products by sales channel
2022
Percentage share values



Source: Compilation by Ismea on Nielsen data

Chart 3.8
Sales channels: change in turnover
2022/2021
Percentage values



Source: Compilation by Ismea on Nielsen data

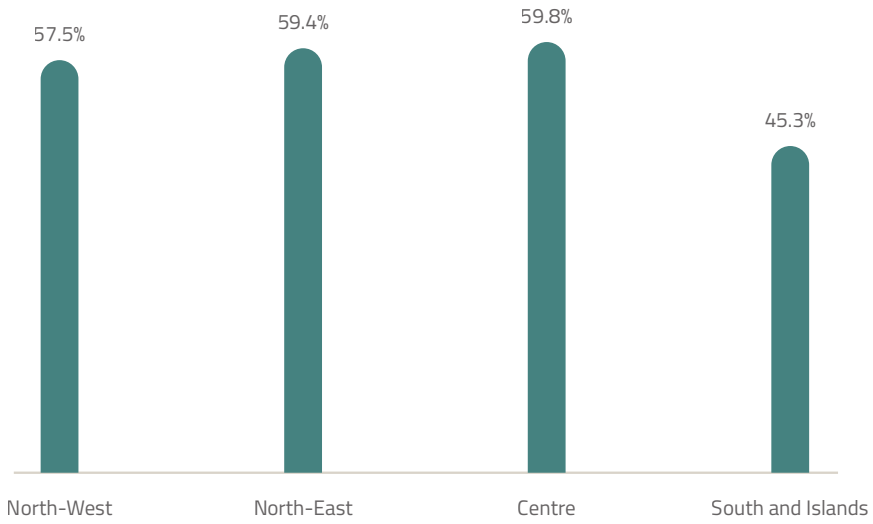
FOCUS: THE ORGANIC OFFER IN CAFES AND RESTAURANTS

From 2021 onwards, out-of-home consumption began to make up in volume and value terms the ground lost through the closures and restrictions imposed during the Covid 19 years, as consumer resistance to closed venues was overcome and tourism recovered. This sector is growing again, despite aggravated inflationary problems linked to rising energy and raw material costs and reduced consumer purchasing power. In order to find out about the current use and future prospects of organic products in the commercial catering channel, particularly in restaurants and cafés, a sample survey was carried out in 2022, providing important elements for evaluation and reflection on the choices made by operators. The survey was conducted on a sample of 1,126 cafés and 864 restaurants and the results were applied to the total number of businesses.

Organic food in cafés

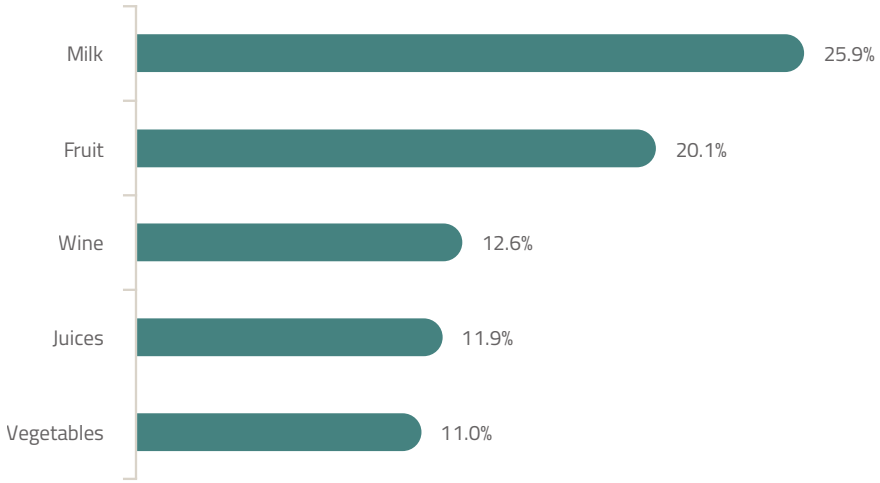
More than half of the cafés in Italy (54.4%) purchase organic products, with an above-average distribution by geographical area for businesses in the centre and north **(Chart 3.9).** On average, café owners spend 18.9% of their total budget on organic products, mainly on milk (25.9%), fresh produce, especially fruit (20.1%) and vegetables (11.0%), wine (12.6%) and juices (11.9%) **(Chart 3.10)**. These purchases are more frequently made from wholesalers specialising in organic products in the north, while coffee shops in central and southern Italy turn to local producers. In addition, more than a quarter of the coffee shops that offer organic products buy from traditional wholesalers, who do not specialise in selling certified products **(Chart 3.11).** Thirty per cent of coffee shops that buy organic products consider that the organic offer has a positive effect on their overall turnover and report a 14.6 % higher price for consumers compared to non-organic products.

Chart 3.9
Cafés: share of organic products purchased per macro-region
2022
Percentage values



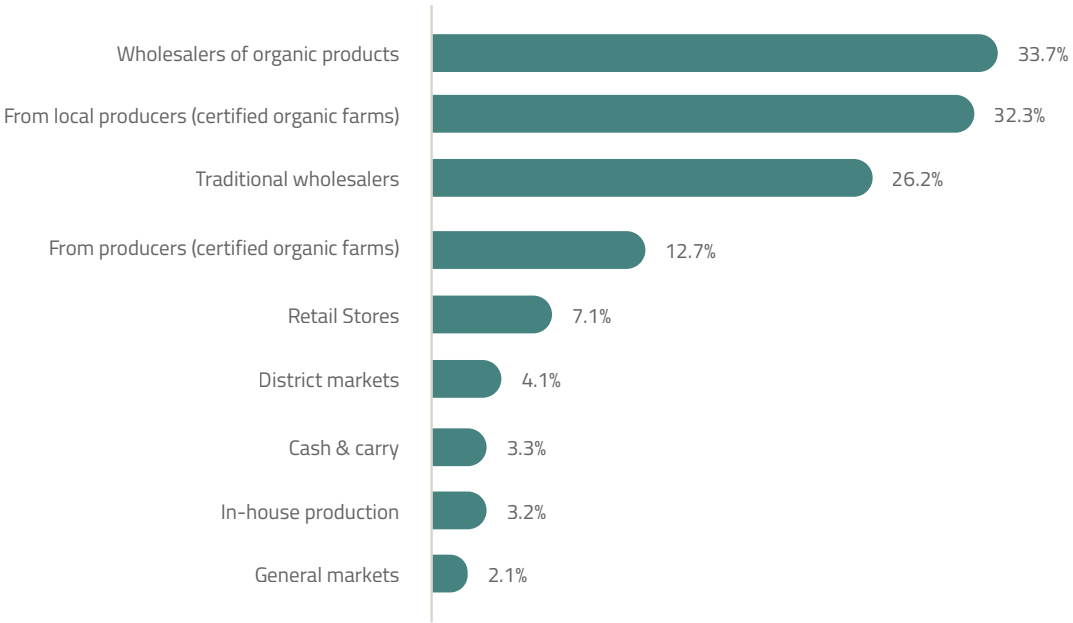
* The sum of percentages is different from 100 because more than one answer was allowed
Source: Compilation by Ismea on sample survey data/FIPE

Chart 3.10
Cafés: share of organic expenditure per product
2022
Percentage values*



* The sum of percentages is different from 100 because more than one answer was allowed
Source: Compilation by Ismea on sample survey data/FIPE

Chart 3.11
Cafés: share of organic products in different supply channels
2022
Percentage values*

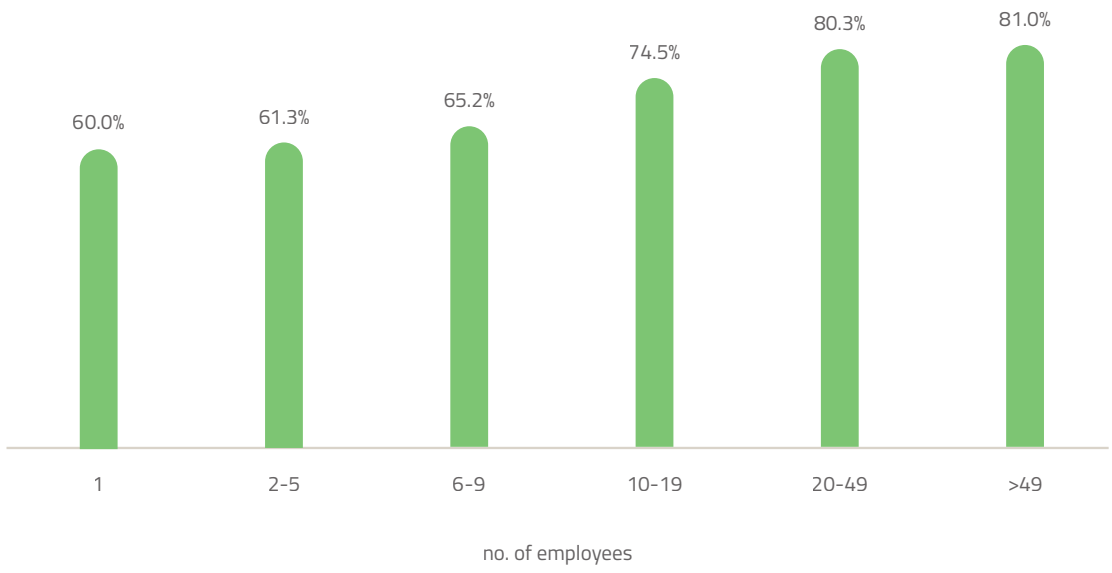


* The sum of percentages is different from 100 because more than one answer was allowed
Source: compilation by Ismea on sample survey data/FIPE

Organic products in restaurants

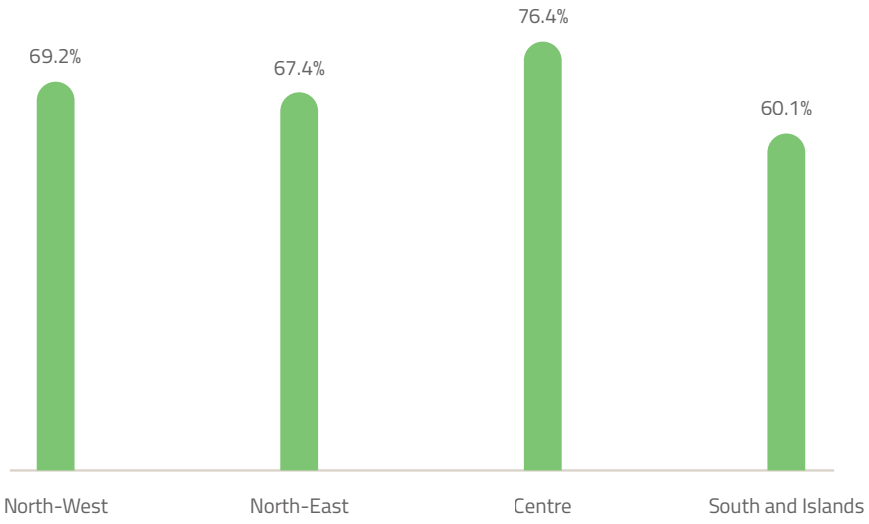
In commercial catering, more than two out of three restaurants (68.4%) offer organic products on their menus, especially in more structured restaurants with more staff **(Chart 3.12).** Geographically, the North is in line with the national average, the Center is a few percentage points above (76.4%), the South and islands are further behind with 60.1% **(Chart 3.13)**. Expenditure on organic products slightly exceeds 33%, and the largest quantities of organic products purchased in this category are vegetables (42.0%), oil (34.5%), fruit (29.5%), eggs (24.1%), and milk and dairy products (21.4%) **(Chart 3.14).** As with coffee shops, most restaurants source their organic produce from local (and non-local) certified organic growers, followed by organic wholesalers and then conventional growers **(Chart 3.15).** Finally, 51.5% of restaurants that purchase organic products, mainly located in the North, consider the economic impact of organic products in their restaurant's offer to be positive, while the average reported price difference for a dish with organic product compared to one with conventional ingredients is 16.6%.

Chart 3.12
Restaurants: organic products share on total products
2022
Percentage values



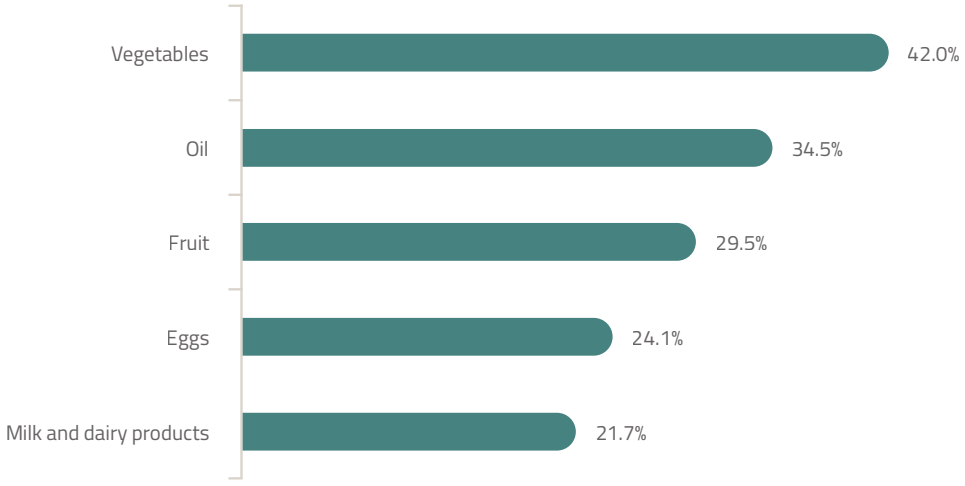
Source: Compilation by Ismea on sample survey data/FIPE

Chart 3.13
Restaurants: share of organic products purchased per macro-region
2022
Percentage values



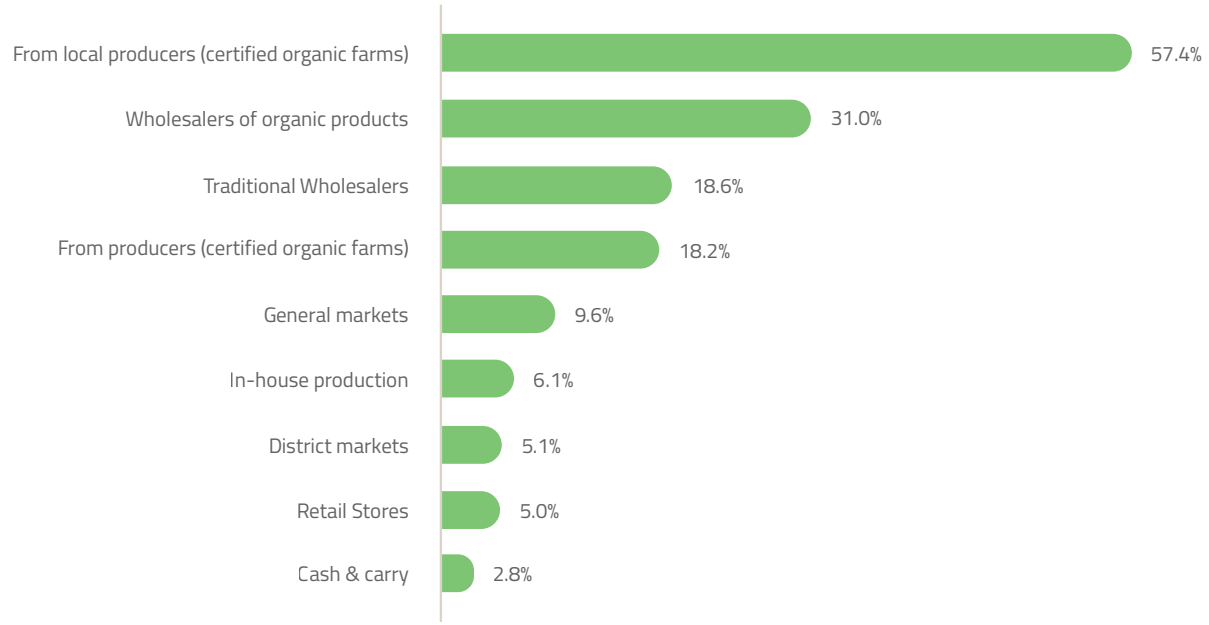
Source: Compilation by Ismea on sample survey data/FIPE

Chart 3.14
Restaurants: share of organic expenditure per product
2022
Percentage values



* The sum of percentages is different from 100 because more than one answer was allowed
Source: Compilation by Ismea on sample survey data/FIPE

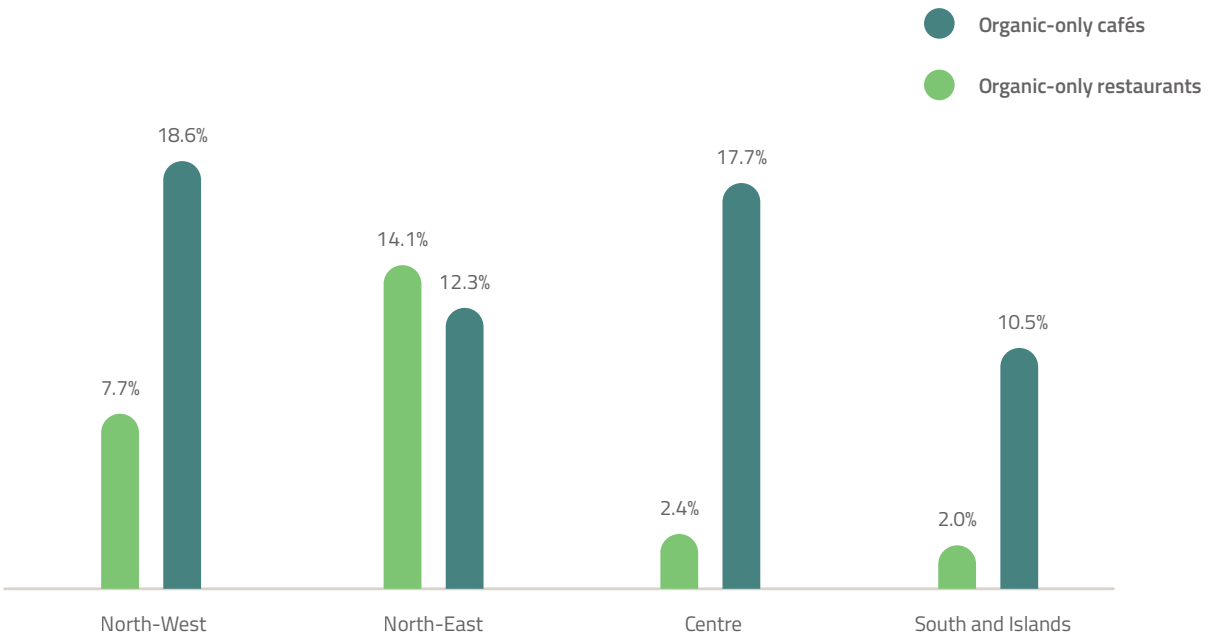
Chart 3.15
Restaurants: share of organic products in different supply channels
2022
Percentage values*



* The sum of percentages is different from 100 because more than one answer was allowed
Source: Compilation by Ismea on sample survey data/FIPE

Expectations for the future are the same for both cafés and restaurants: in the short term, the majority of respondents expressed a willingness to confirm the same level of organic purchases (83.1% restaurants; 92.1% cafés). The long-term analysis shows a different picture: indeed, only 6 % of coffee shops intend to move towards a 100 % organic menu, while for restaurants this indicator exceeds 13 % of the sample. In both cases, the propensity for full conversion is more pronounced in the structured establishments located in the north or (for restaurants only) in the centre of the peninsula. In contrast, shopkeepers in the south, especially in the coffee shop sector, are more reluctant to fully convert to organic products **(Chart 3.16).**

Chart 3.16
Cafés and restaurants planning to offer 100% organic menus in the near future
2022
Percentage values



Source: Compilation by Ismea on sample survey data/FIPE

ORGANIC PRODUCT PRICES

Farm-gate prices for organic products

With regard to farm-gate prices, 2022 is characterised by continued marked instability and a general upward trend. The rise in the prices of agricultural products, both conventional and organic, which was already noticeable in the second half of 2021, resumed with the invasion of Ukraine, which destabilised the markets for the main commodities.

The overview of annual average farm-gate prices, analysed on a sample of reference products, shows that increases over twelve months are almost always above 20%. On closer inspection, the phenomenon experienced its own rapid evolution during 2022, with fears and the risk of raw material shortages causing stock markets to explode in late spring. Then, towards the end of the year, the ongoing conflict situation, which removed the possibility of a blitzkrieg, and the achievement of a new order in international trade helped to cool tariffs, which fell to pre-Covid levels for several mass productions.

The comparative analysis of prices between organic and conventional products shows a similar trend. There have been price increases in both sectors, although the smaller size of the organic markets and less dependence on imports have limited the upward momentum. As already seen for most crops in 2021, the price gap for organic farmers compared to their conventional counterparts will continue to narrow in 2022 **(Charts 3.17, 3.18 and 3.19).**

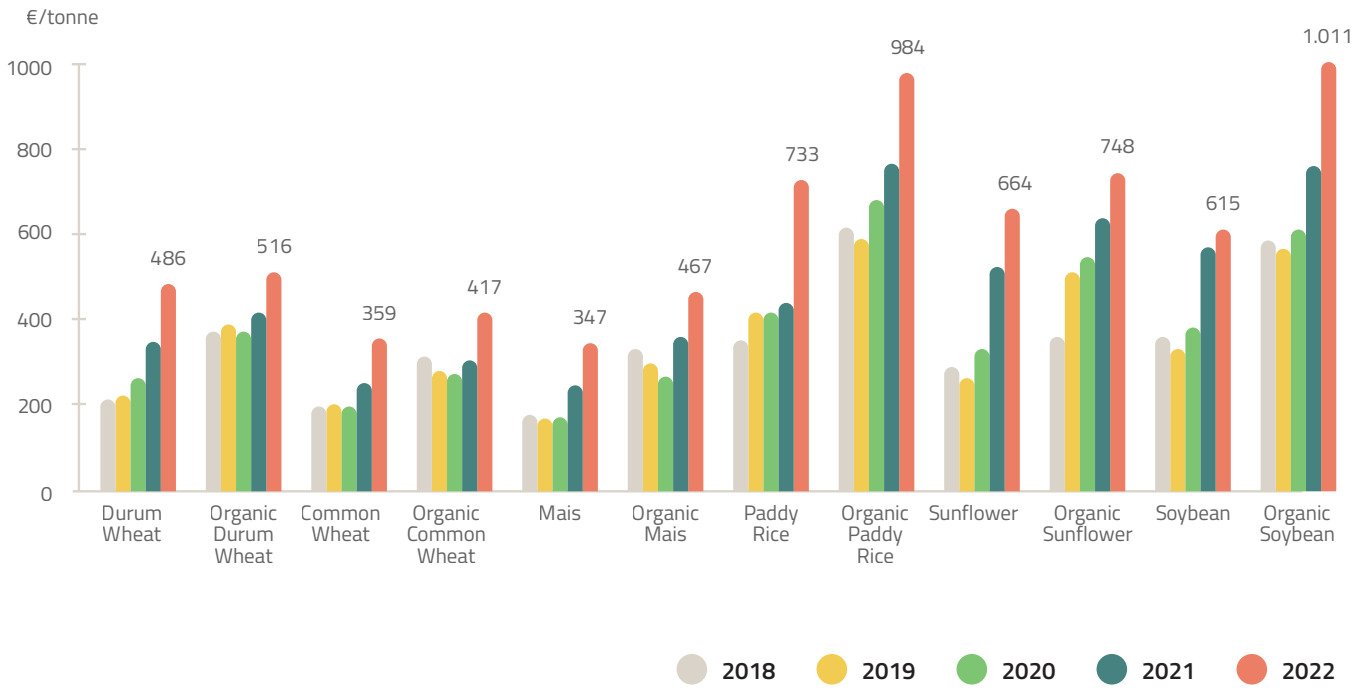
Farm-gate prices for organic products are available in the bio-statistics section of http://www.sinab.it/.

Chart 3.17

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

2018 - 2022

Values in €/tonne



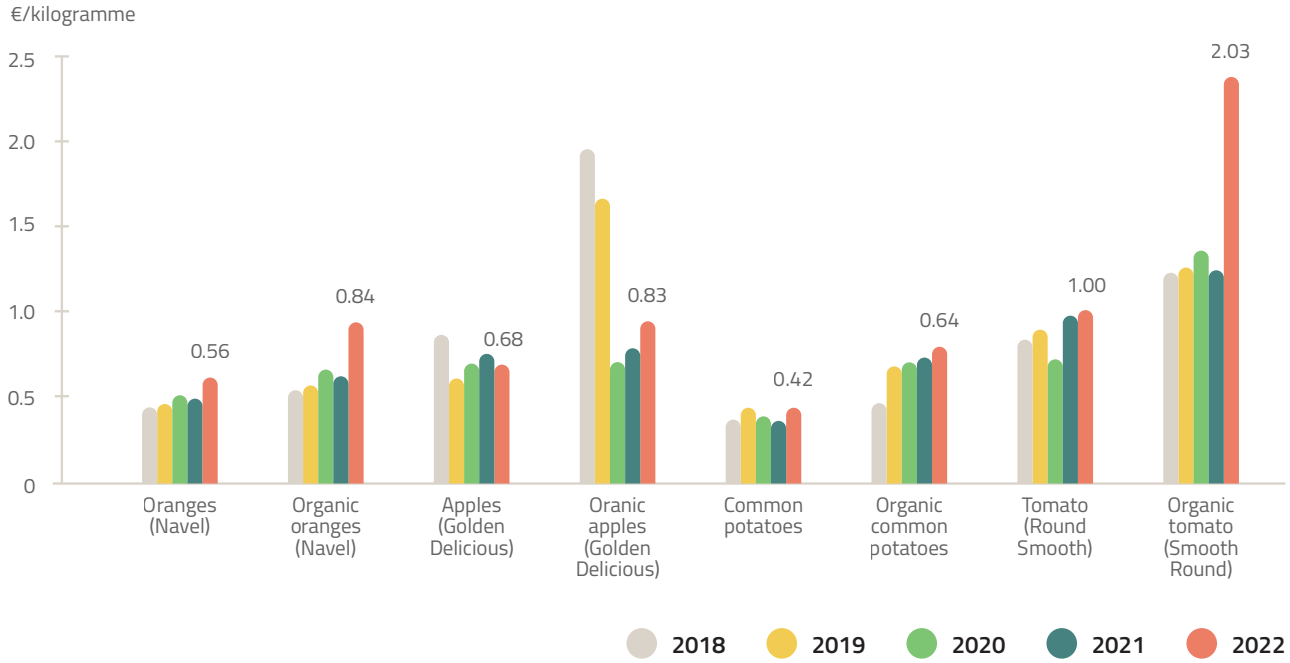
Source: Ismea Price Survey Network

Chart 3.18

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

2018 - 2022

Values in €/Kilogramme



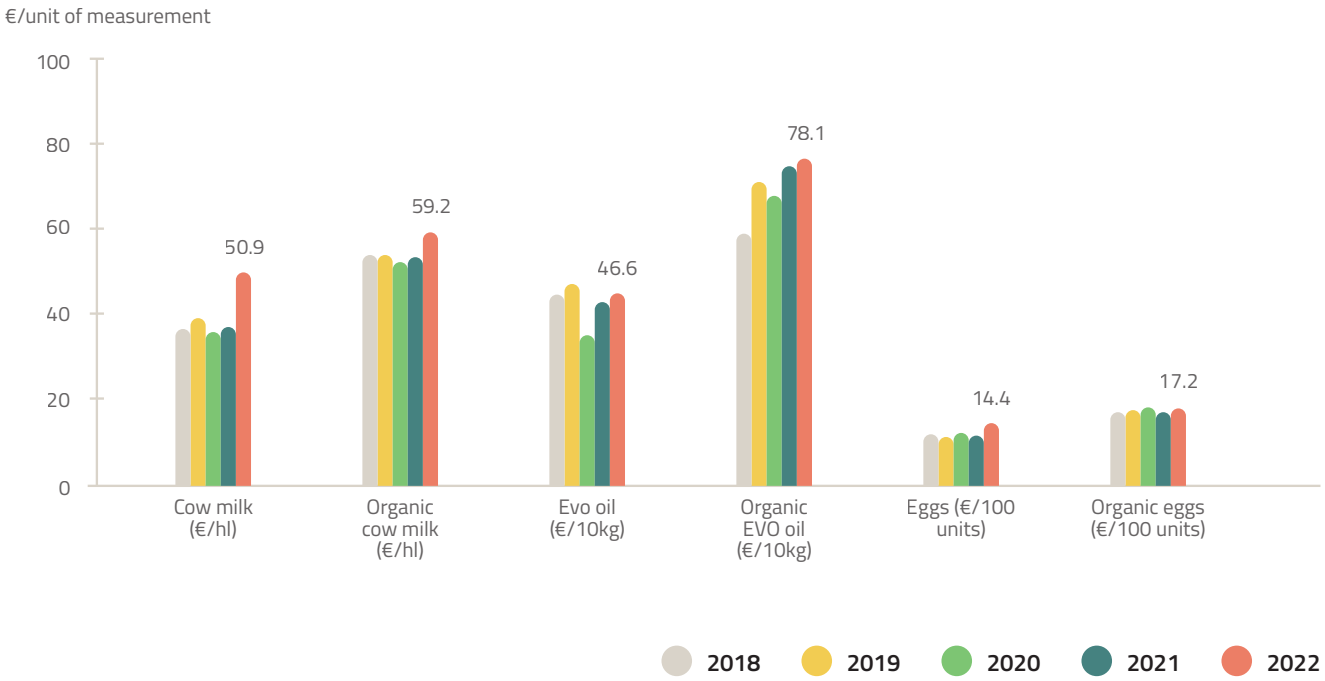
Source: Ismea Price Survey Network

Chart 3.19

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

2018 - 2022

Values in €/unit of measurement

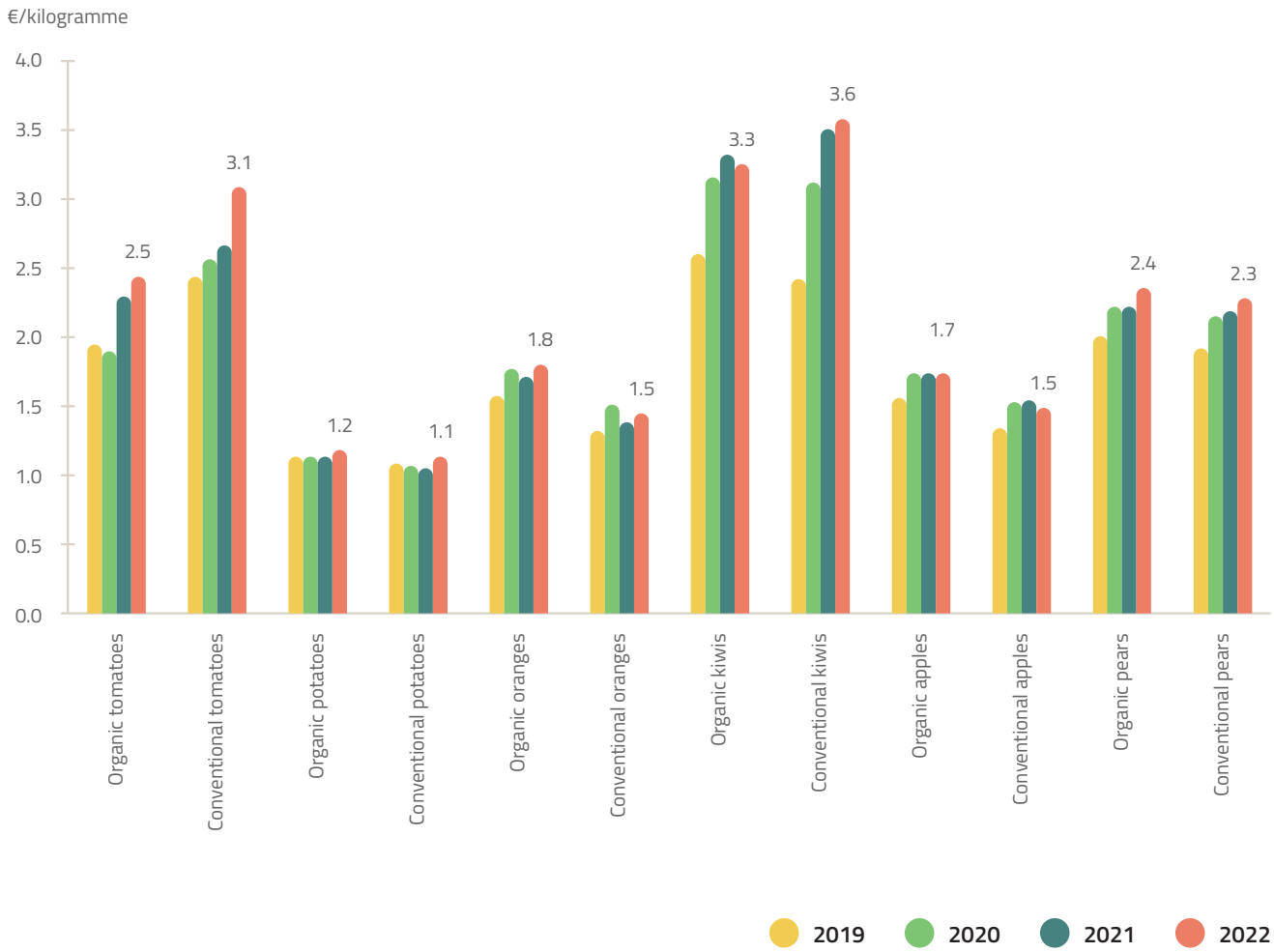


Source: Ismea Price Survey Network

Consumer prices in the large-scale retail trade

Consumer prices are collected in the large-scale retail trade. The price is the average shelf price paid by Italian households and monitored for 2022. The basket of products was selected as relevant or directly related to the products for which the farm-gate price was analysed. As highlighted in 2021, there were significant increases in shelf prices in all categories for the second year in a row. However, the increases recorded for the sample of consumer products, which has now been monitored for more than five years, again show a continuous upward trend, although they never reach the increases observed for farm-gate prices. Another piece of evidence that can be found when reading the sample data concerns the different levels of price increases. Compared to 2021, conventional products show the largest increases **(Charts 3.20 and 3.21).**

Chart 3.20
Consumer prices of some organic products and of their conventional counterparts
2019 - 2022
Values in €/kilogramme



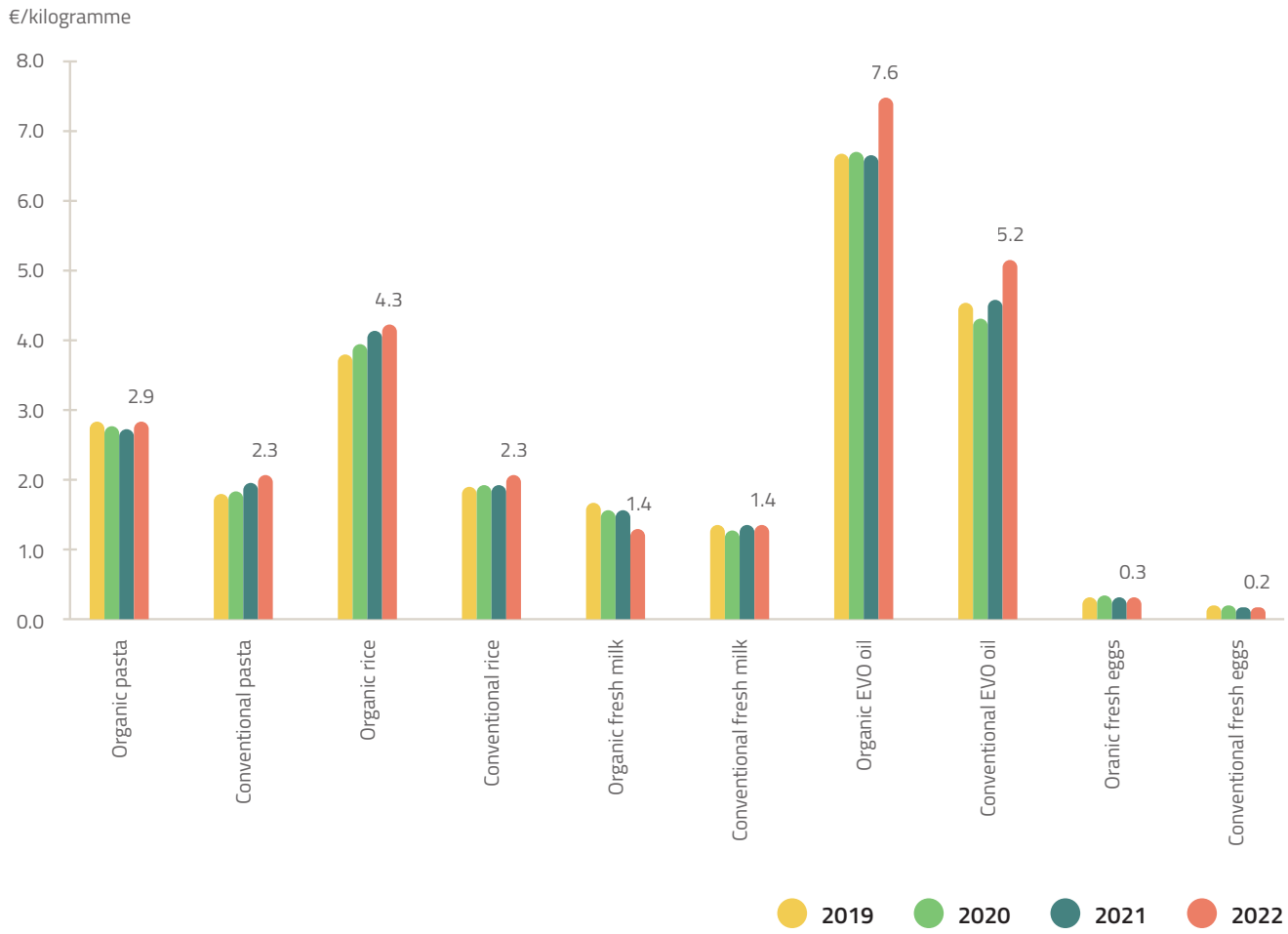
Source: Compilation by Ismea on Nielsen data

Chart 3.21

Consumer prices of some organic products and of their conventional counterparts

2019 - 2022

Values in €/kilogramme



Source: Compilation by Ismea on Nielsen data

IMPORTS
FROM THIRD COUNTRIES

Administrative and statistical data compilation

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Fabiana Crescenzi
Francesco Solfanelli

This section is the result of the collaborative effort of a working group on imports of organic products, within the DIMECOBIO IV 2021-2024 project, which includes the three authors, Patrizia Pugliese (CIHEAM Bari) and Raffaele Zanoli (UNIVPM)

INTRODUCTION

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

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

The data[1] presented in this publication considers both imports under the compliance system referred to in point a) and imports under the equivalence system described in points b) and c). However, until 31 December 2024 certification under equivalence arrangements, pursuant to the previous Reg. (EC) 834/2007, for control bodies authorised by the European Commission to certify in third countries, will still be in force; concerning point b) there are currently only a few countries recognised with a specific trade agreement (Chile, Switzerland, and Great Britain). For the rest, the equivalence recognition of third countries according to Reg. (EC) 834/2007 is still valid until 31 December 2026.

Figures presented here do not consider intra-Community trade, and therefore do not fully account for all volumes of organic products entering Italy from third countries via other EU countries.

The tables and charts which follow have been prepared by SINAB on the basis of data collected from **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. As provided for in Reg. (EU) 2021/2306 and Ministerial Decree No. 52932 of 4 February 2022 (DM n. 52932 del 4 febbraio 2022), starting from 1 January 2022, declarations of consignments of organic products imported from third countries to the EU shall be handled exclusively via the TRACES platform. Access to the TRACES database makes it possible to acquire information from the authorization certificates of all consignments of products imported or potentially imported from countries outside the EU (certificates of inspection). Regarding the collection of data on imports, the TRACES platform allowed the acquisition of all imports of organic products to Italy, including those made by EU operators not notified in Italy[2].

As of 31 December 2022, there were 582 companies on the national list of importers of organic products from third countries, of which 258 had an import activity during 2022. Data relating to the product volumes were classified according to the TARIC[3] (Integrated Tariff of the European Communities) customs tariffs, as reported by the operators in their notification on TRACES. TARIC is based on the Combined Nomenclature (CN), whose sub-headings (identified by an 8-digit code number) represent the basic nomenclature for the Common Customs Tariff as well as for the statistics relating to the external trade of the Community and to trade between Member States.

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

[2] 90.4% of the volume of organic products coming to Italy is imported by Italian importers notified on the national SIB system, while the remaining 9.6% enters Italy through importers from other EU Member States.

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

ORGANIC PRODUCTS IMPORTED FROM THIRD COUNTRIES

Data analysis as of 31 December 2022

Data analysis as of 31 December 2022 on imports of organic products from third countries highlights a -17.1% decrease in total volumes as against 2021 **(Table 4.1).** Import decline in absolute terms was mainly driven by cereals (-22%), industrial crops (-25.9%) and to a greater extent vegetable oils/fats (-30.7%). The other product categories that showed substantial negative trends compared to 2021were fresh vegetables and pulses (-16.4%) and processed products (-30.9%). The category that includes coffee, cocoa, sugar, tea, and spices was the only one on the rise, with a +4.6% increase in imported volumes compared to 2021 **(Table 4.1).**

Table 4.1

Volumes of organic products imported to Italy from third countries, by product category and geographical area
2021 and 2022
Tonnes and percentage values

Product category	Area of origin	Volume 2021 t	Volume 2022 t	Change 2022-2022 %
Cereals	Africa	-	10.3	-
	Asia	28,777.5	31,532.4	9.6
	Central America	-	-	-
	Non-EU Europe	21,029.7	7,551.8	-64.1
	North America	2,193.6	1,304.2	-40.5
	Oceania	-	-	-
	South America	2,112.5	1,789.1	-15.3
	Total	**54,113.3**	**42,187.9**	**-22.0**
Fresh and dried fruit	Africa	1,227.3	2,420.4	97.2
	Asia	532.5	611.9	14.9
	Central America	4,063.2	1,548.7	-61.9
	Non-EU Europe	6,855.1	6,974.5	1.7
	North America	149.7	164.3	9.8
	Oceania	-	-	-
	South America	28,112.6	27,936.1	-0.6
	Total	**40,940.4**	**39,656.0**	**-3.1**
Fresh vegetables and pulses	Africa	844.9	6,042.8	615.2
	Asia	6,961.6	3,325.6	-52.2
	Central America	-	-	-
	Non-EU Europe	7,905.3	4,465.1	-43.5
	North America	595.1	199.9	-66.4
	Oceania	-	-	-
	South America	895.0	354.2	-60.4
	Total	**17,201.8**	**14,387.7**	**-16.4**
Industrial crops*	Africa	16,764.3	21,594.4	28.8
	Asia	17,266.4	752.7	-95.6
	Central America	-	-	-
	Non-EU Europe	940.6	3,608.2	283.6
	North America	137.1	51.0	-62.8
	Oceania	-	-	-
	South America	409.1	315.5	-22.9
	Total	**35,517.5**	**26,321.9**	**-25.9**
Vegetable oils and fats	Africa	30,783.0	21,419.4	-30.4
	Asia	240.5	238.0	-1.1
	Central America	-	-	-
	Non-EU Europe	314.9	76.3	-75.8
	North America	88.2	30.5	-65.4
	Oceania	-	-	-
	South America	21.6	19.4	-10.2
	Total	**31,448.3**	**21,783.6**	**-30.7**

Product category	Area of origin	Volume 2021 t	Volume 2022 t	Change 2022-2021 %
Coffee, Cocoa, Sugars, Tea, and Spices	Africa	3,211.4	5,762.4	79.4
	Asia	2,165.8	2,179.8	0.6
	Central America	7,094.4	5,884.4	-17.1
	Non-EU Europe	240.7	28.4	-88.2
	North America	1,878.2	777.6	-58.6
	Oceania	19.2	19.2	0.2
	South America	13,582.8	14,826.2	9.2
	Total	**28,192.5**	**29,478.0**	**4.6**
Processed products	Africa	436.2	292.0	-33.1
	Asia	4,232.0	2,271.1	-46.3
	Central America	67.8	-	-100.0
	Non-EU Europe	6,425.2	5,000.5	-22.2
	North America	825.1	617.8	-25.1
	Oceania	0.9	2.9	233.6
	South America	1,451.1	1,096.5	-24.4
	Total	**13,438.3**	**9,280.9**	**-30.9**
Total Products		**220,852.1**	**183,095.9**	**-17.1**

*'Industrial crops' include soya meal

Source: Compilation by SINAB on TRACES data

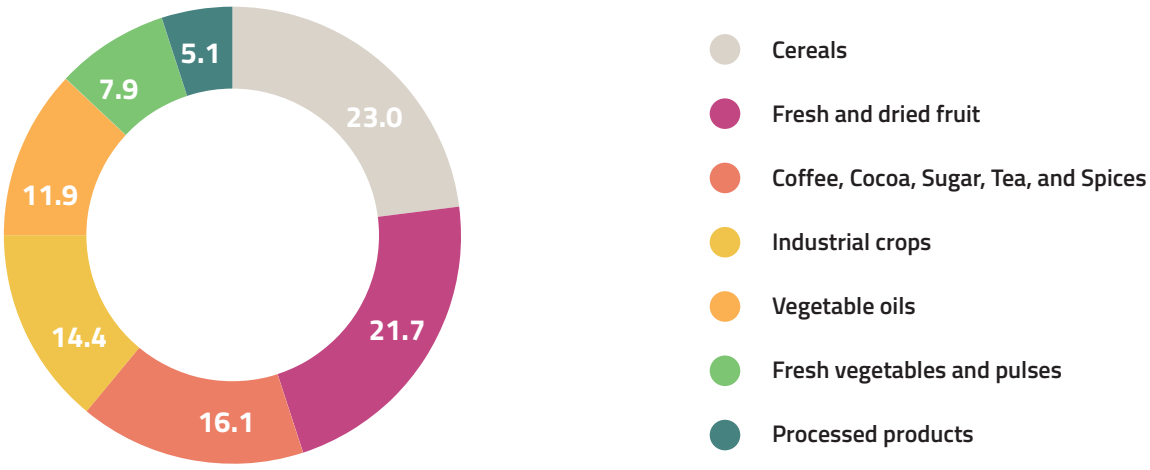
In 2022, cereals (wheat, maize, rice, other cereals) were the most imported organic product category, accounting for 23.0% of the total imported volume. Next came the category of fresh and dried fruit (bananas, nuts, frozen fruit, dates, figs and pineapples, apples and pears, grapes, and other fresh fruit) with 21.7%, while the category including coffee, cocoa, sugar, tea, and spices followed in the third position with 16.1% **(Chart 4.1).**

Chart 4.1

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

2022

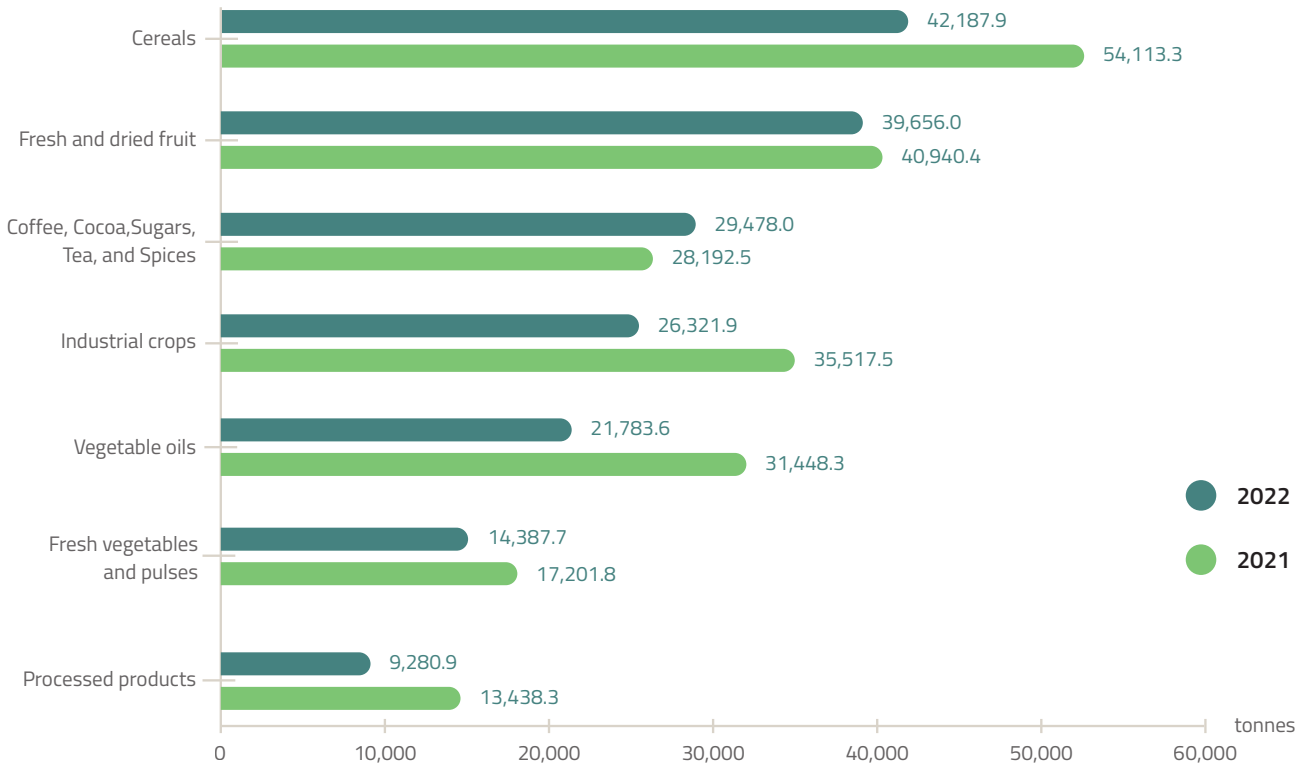
Percentage values



Source: Compilation by SINAB on TRACES data

Cereals, vegetable oils and industrial crops are the categories with the largest reduction between 2021 and 2022, with about 12,000, 10,000 and 9,000 tonnes less imported respectively **(Chart 4.2)**. Imported volumes also decreased slightly compared to the previous year for other categories, including processed products in general (about 4,000 tonnes less), fresh vegetables and pulses (about 3,000 tonnes less) and fresh and dried fruit (about 1,000 tonnes less) **(Table 4.1 and Chart 4.2).**

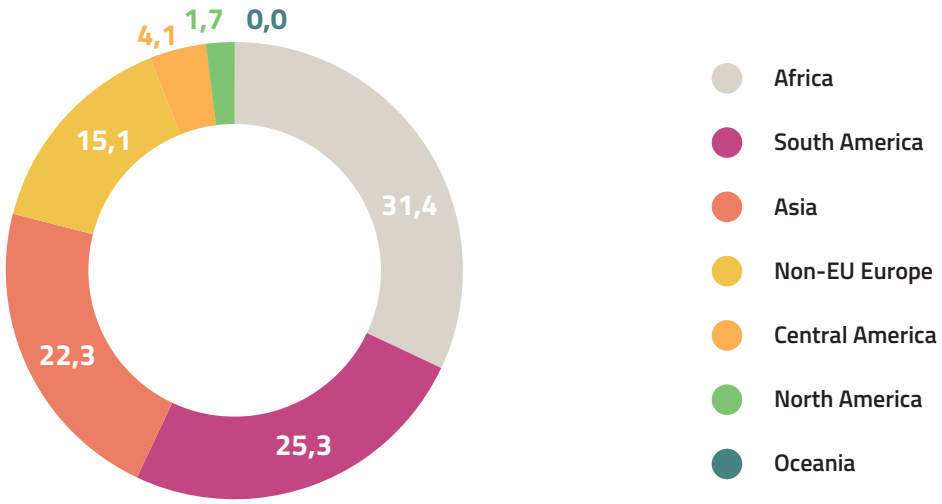
Chart 4.2
Volumes of organic products imported to Italy from third countries, by product category
2021 and 2022
Tonnes



Source: Compilation by SINAB on TRACES data

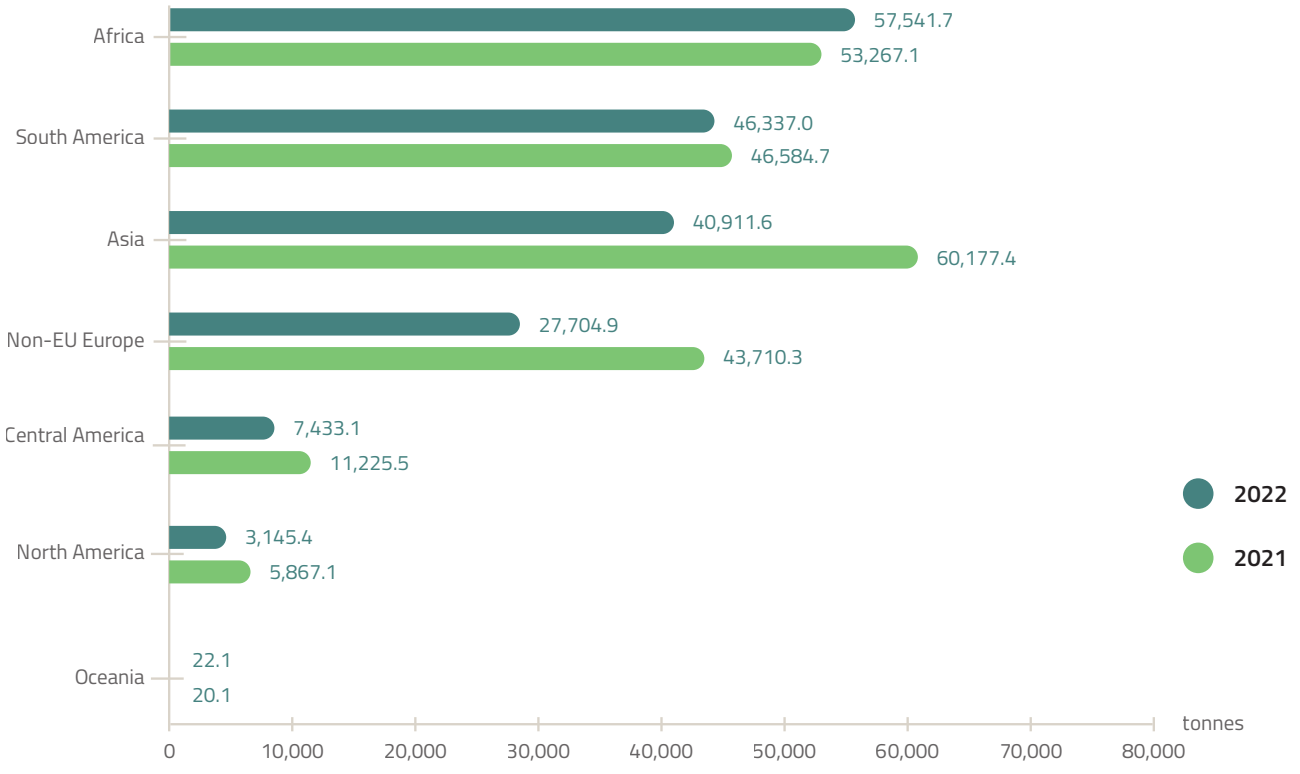
In 2022, Africa was the largest exporter of organic products to Italy with 31.4% of total imported volumes, followed by South America (25.3%) and Asia (22,3%) **(Chart 4.3 and 4.4).** In the same period the volumes of organic products exported to Italy by Asia and non-EU European countries declined significantly, mainly due to the fall of cereal and industrial crop imports.

Chart 4.3
Share of volumes of organic products imported to Italy from third countries, by geographical area
2022
Percentage values



Source: Compilation by SINAB on TRACES data

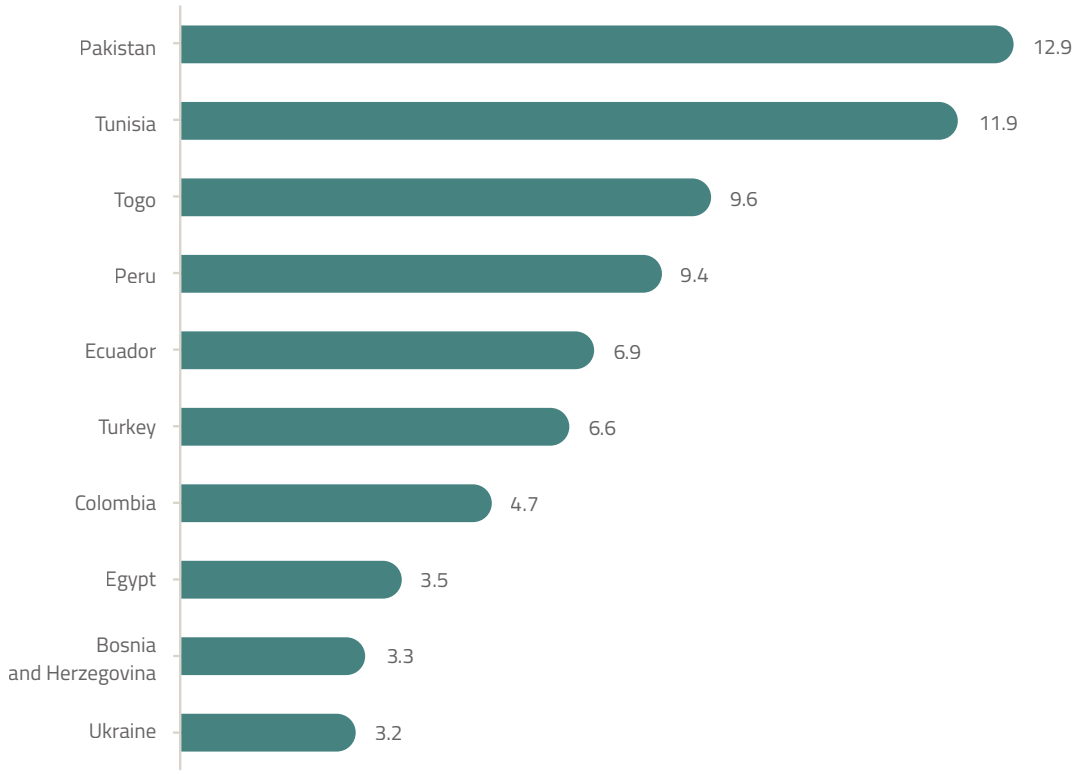
Chart 4.4
Volumes of organic products imported to Italy from third countries by geographical area
2021 and 2022
Tonnes



Source: Compilation by SINAB on TRACES data

Still in 2022, Pakistan and Tunisia were again the top two exporters, accounting for 12.9% and 11.9% of the total imported volume, respectively. They were followed by Togo (9.6%), Peru (9.4%), Ecuador (6.9%) and Turkey (6.6%) **(Chart 4.5).**

Chart 4.5
Share of imports from the top 10 third countries in total import volume of organic products in Italy
2022
Percentage values



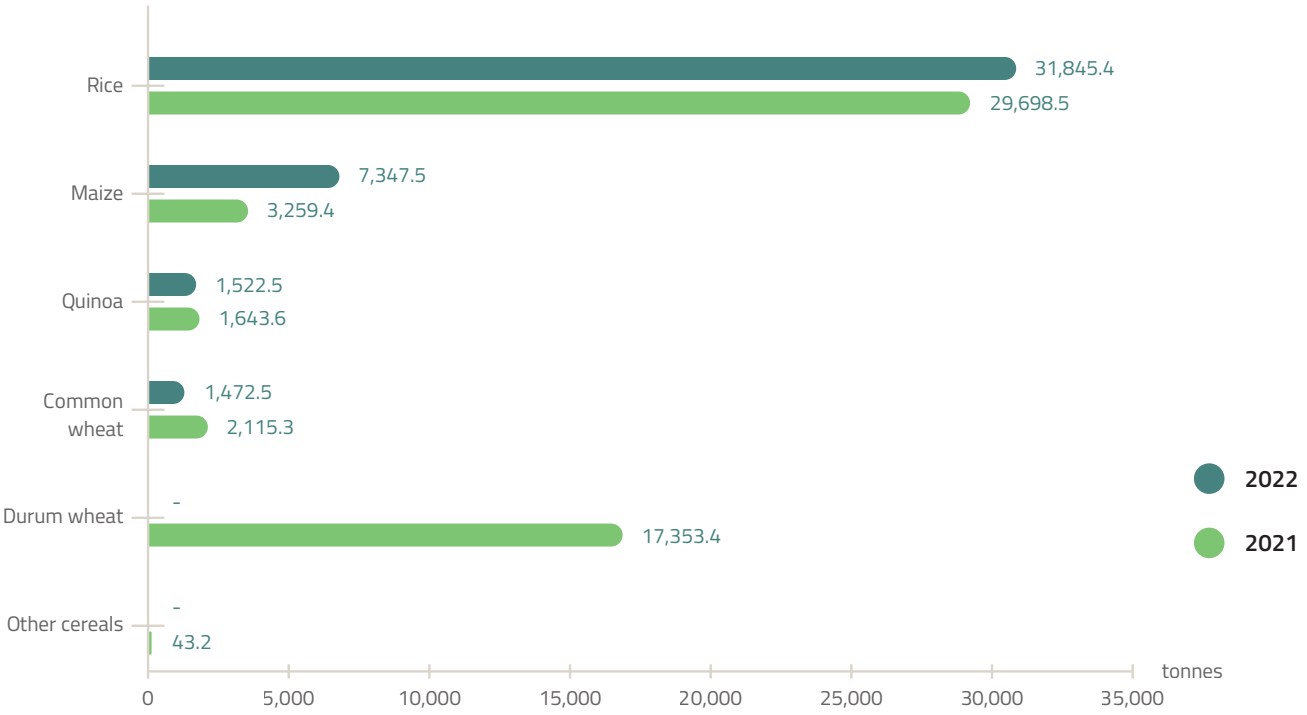
Source: Compilation by SINAB on TRACES data

FOCUS ON IMPORTED CATEGORIES

Cereals

The large reduction in imports of durum wheat from Turkey (-17,148 tonnes) led to a significant drop in imports of organic cereals for the second consecutive year, despite the growth of maize and rice, which gained +125.0% and +7.2% respectively. On the other hand, soft wheat and quinoa dropped by 30.4 percent and 7.3 percent respectively, but in absolute terms, the volumes of products concerned were relatively small **(Chart 4.6 and Table 4.2).**

Chart 4.6
Volumes of organic cereals imported to Italy from third countries by crop type
2021 and 2022
Tonnes



Source: Compilation by SINAB on TRACES data

Table 4.2

Volumes of organic cereals imported to Italy from third countries, by crop type and country of origin

2022

Tonnes

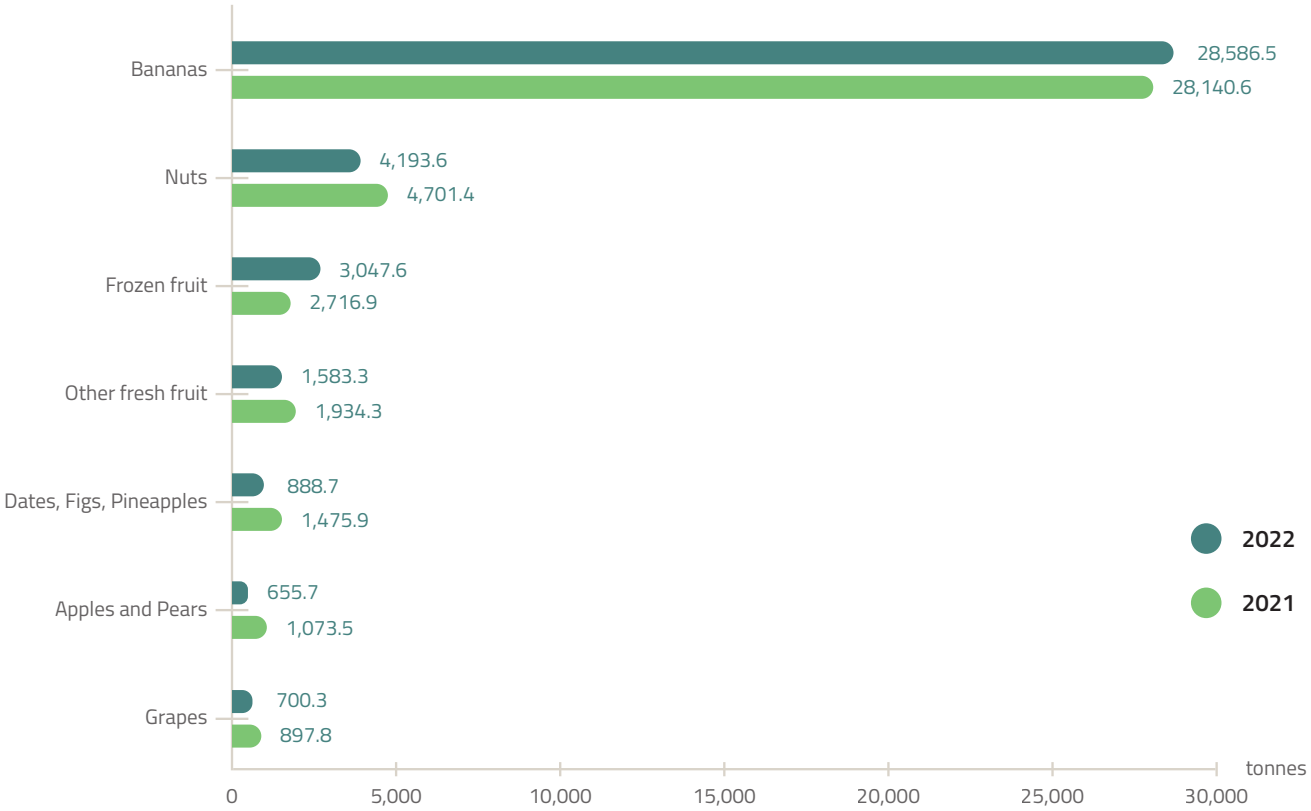
Geographical area	Country	Common wheat	Maize	Rice	Quinoa	Total cereals
Africa	Senegal	-	-	-	10.3	**10.3**
North America	Canada	1,268.2	-	-	-	**1,268.2**
	United States	-	-	-	36.0	**36.0**
South America	Argentina	-	-	275.0	-	**275.0**
	Bolivia	-	-	-	172,1	**172.1**
	Brazil	-	-	60.0	-	**60.0**
	Peru	-	-	-	1.282,0	**1,282.0**
Asia	Cambodia	-	-	1,454.8	-	**1,454.8**
	India	-	-	3,945.2	-	**3,945.2**
	Kasakhstan	-	-	-	22.0	**22.0**
	Pakistan	-	-	23,170.3	-	**23,170.3**
	Thailand	-	-	2,940.2	-	**2,940.2**
Non-EU Europe	Bosnia and Herzegovina	-	4,244.4	-	-	**4,244.4**
	Moldova	110.1	946.0	-	-	**1,056.1**
	Serbia	94.2	-	-	-	**94.2**
	Turkey	-	49.0	-	-	**49.0**
	Ukraine	-	2,108.1	-	-	**2,108.1**
Total		**1,472.5**	**7,347.5**	**31,845.4**	**1,522.5**	**42,187.9**

Source: Compilation by SINAB on TRACES data

Fresh and dried fruit

As in past years, bananas were the most imported organic fruit in 2022. About 90% of bananas came from South America (Ecuador, Peru, and Colombia), while the remaining share originated from Central America (Dominican Republic) and Africa (Ivory Coast) **(Table 4.3)**. Except for imported bananas and frozen fruit, which recorded a +1.6% and a +12.2% increase respectively compared to 2021, imports of all other fruit declined in 2022. Also worth mentioning the drop recorded for nuts (-10.8%), of which more than 45% originated from Turkey **(Chart 4.7 and Table 4.3).**

Chart 4.7
Volumes of organic fresh and dried fruits imported to Italy from third countries by crop type
2021 and 2022
Tonnes



Source: Compilation by SINAB on TRACES data

Table 4.3

Volumes of organic fresh and dried fruits imported to Italy from third countries by product category and country of origin

2022

Tonnes

Geographical area	Country	Bananas	Nuts	Dates, Figs, Pineapples	Grapes	Apples and Pears	Other Fresh frit	Frozen fruit	Total fruit
Africa	Burkina Faso	-	81.9	17.0	-	-	-	-	**98.9**
	Egypt	-	-	2.0	-	-	--	--	**2.0**
	Ghana	225.0	2.1	-	-	-	-	-	**227.1**
	Ivory Coast	1,530.0	227.5	-	-	-	-	-	**1,757.6**
	Togo	-	-	29.3	-	-	-	-	**29.3**
	Tunisia	-	-	305.6	-	-	-	-	**305.6**
Central America	Costa Rica	-	-	78.7	-	-	-	-	**78.7**
	Dominican Republic	1,470.1	-	-	-	-	-	-	**1,470.1**
North America	United States	-	164.3	-	-	-	-	-	**164.3**
South America	Argentina	-	176.6	-	-	655.8	264.0	-	**1,096.3**
	Bolivia	-	72.0	-	-	-	-	-	**72.0**
	Brazil	-	174.6	-	-	-	-	-	**174.6**
	Chile	-	208.6	-	-	-	894.0	96.2	**1,198.8**
	Colombia	3,545.5	-	-	-	-	-	-	**3,545.5**
	Ecuador	12,128.6	-	-	-	-	-	-	**12,128.6**
	Peru	9,687.4	32.8	-	-	-	-	-	**9,720.2**
Asia	Azerbaijan	-	22.0	-	-		-	-	**22.0**
	China	-	71.0	-	-	-	-	-	**71.0**
	Israel	-	-	142.0	-	-	-	-	**42.1**
	Palestine	-	-	5.8	-	-	-	-	**142.0**
	Philippines	-	42.1	-	-	-	-	-	**5.8**
	Sri Lanka	-	90.2	5.8	-	-	-	-	**95.9**
	Vietnam	-	233.0	-	-	-	-	-	**233.0**
Non-EU Europe	Albania	-	152.2	-	-	-	-	37.9	**190.1**
	Bosnia and Herzegovina	-	0.5	-	-	-	-	-	**0.5**
	Moldova	-	78.5	-	-	-	-	-	**78.5**
	Serbia	-	200.8	-	-	-	425.3	102.6	**728.6**
	Turkey	-	1,911.9	302.6	700.3	-	-	711.7	**3,626.6**
	Ukraine	-	251.0	-	-	-	-	2,099.3	**2,350.3**
Total		**28,586.6**	**4,193.6**	**888.7**	**700.3**	**655.8**	**1,583.3**	**3,047.6**	**39,656.0**

Source: Compilation by SINAB on TRACES data

Fresh vegetables and pulses

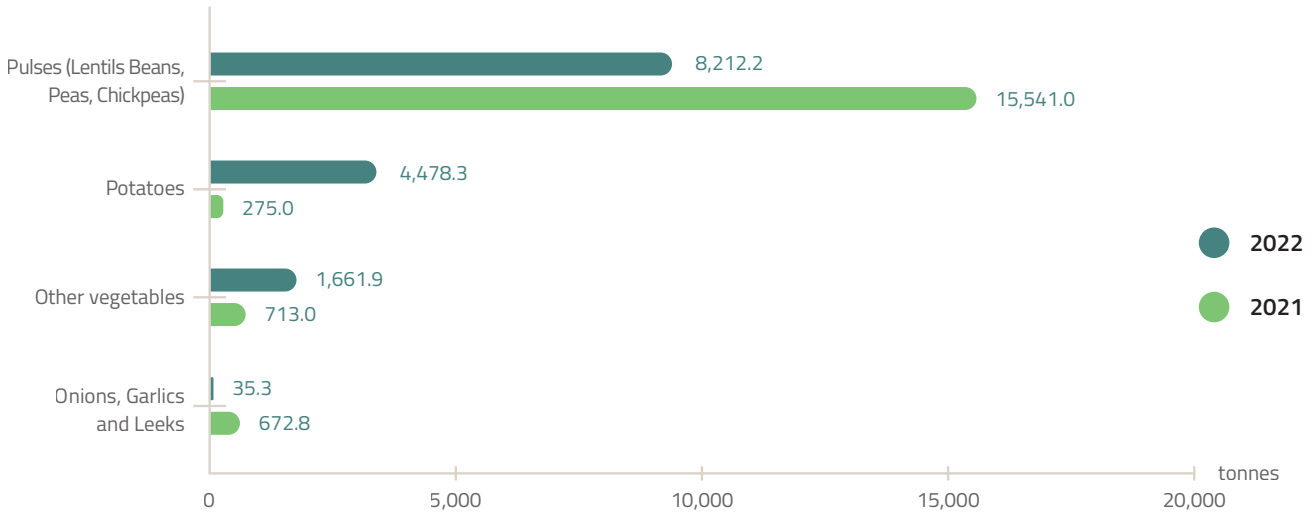
Despite the considerable reduction in imported volumes compared to 2021 (-47.2%), pulses still represented the largest share of the imported volume in their category in 2022. More specifically, lentils from Turkey and beans from China showed the heaviest drop **(Chart 4.8 and Table 4.4).** The category including onions, garlic and leeks also declined, while potatoes and other vegetables imported from Egypt increased significantly **(Chart 4.8 and Table 4.4).**

Chart 4.8

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

2021 e 2022

Tonnes



Source: Compilation by SINAB on TRACES data

Table 4.4

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

2022

Tonnes

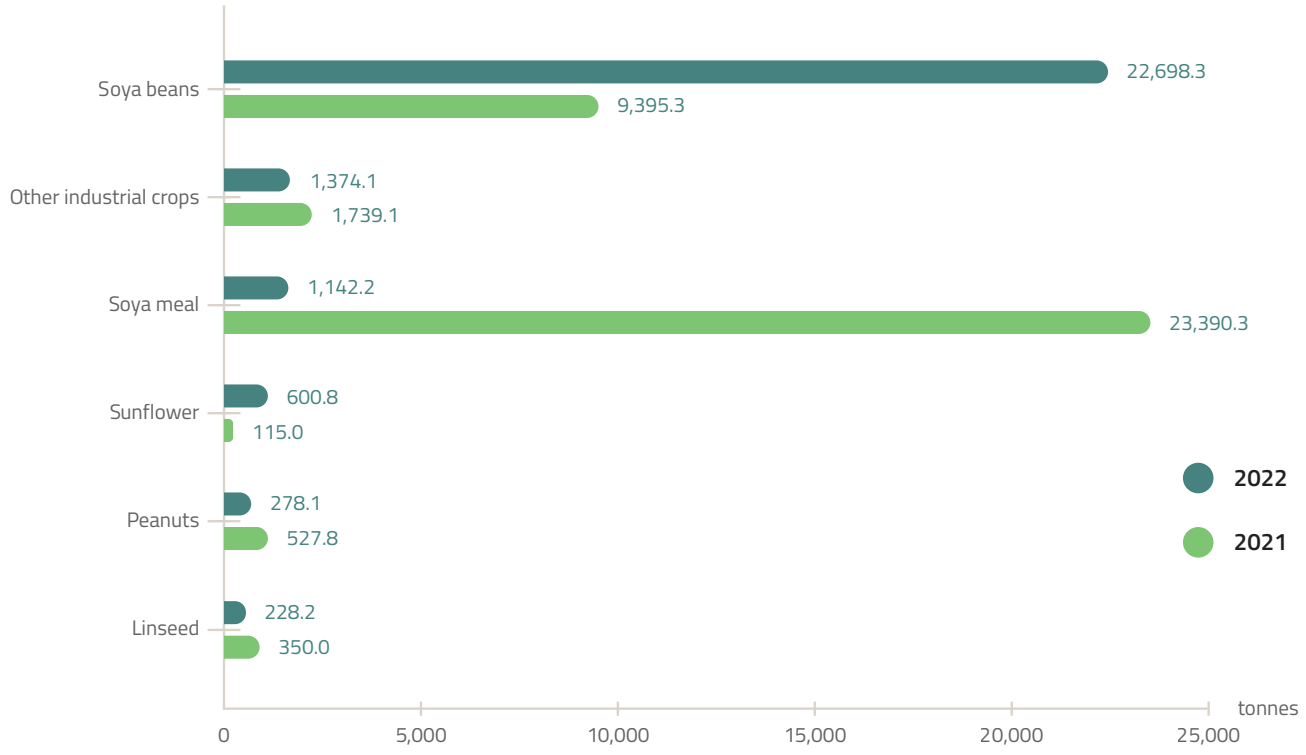
Geographical area	Country	Potatoes	Onions, Garlics and Leeks	Pulses	Fresh vegetables	Total Fresh vegetables
Africa	Egypt	4,455.8	35.3	168.0	1,382.8	**6,041.9**
	South Africa	-	-	1.0	-	**1.0**
North America	Canada	-	-	160.0	-	**160.0**
	United States	-	-	39.9	-	**39.9**
South America	Argentina	-	-	354.2	-	**354.2**
Asia	China	-	-	3,006.6	-	**3,006.6**
	Israel	22.5	-	-	-	**22.5**
	Japan	-	-	0.2	0.0	**0.2**
	Kazakhstan	-	-	105.0	-	**105.0**
	Thailand	-	-	0.2	-	**0.2**
	Uzbekistan	-	-	-	191.2	**191.2**
Non-EU Europe	Moldova	-	-	22.0	-	**22.0**
	United Kingdom	-	-	-	13.8	**13.8**
	Russia	-	-	130.0	-	**130.0**
	Serbia	-	-	4.0	-	**4.0**
	Turkey	-	-	4,199.2	74.1	**4,273.2**
	Ukraine	-	-	22.0	-	**22.0**
Total		**4.478.3**	**35.3**	**8.212.2**	**1.661.9**	**14.387.7**

Source: Compilation by SINAB on TRACES data

Industrial crops

Soya meal and soya beans were the main imported products in this category in 2022 **(Chart 4.9).** The year 2022 was marked by a substantial decline in soya meal originating from China and a sharp increase in soya beans from Africa (primarily from Togo) **(Table 4.5)**. Regarding other industrial crops, in the same period, overall, the imported volumes of groundnuts (-47.3%), linseed (-34.8%) and other industrial crops (-21%) declined; a positive countertrend was observed in the sunflower seed category for which higher imported volumes (+421.7%) were recorded.

Chart 4.9
Volumes of organic industrial crops imported to Italy from third countries, by product category
2021 and 2022
Tonnes



Source: Compilation by SINAB on TRACES data

Table 4.5

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

2022

Tonnes

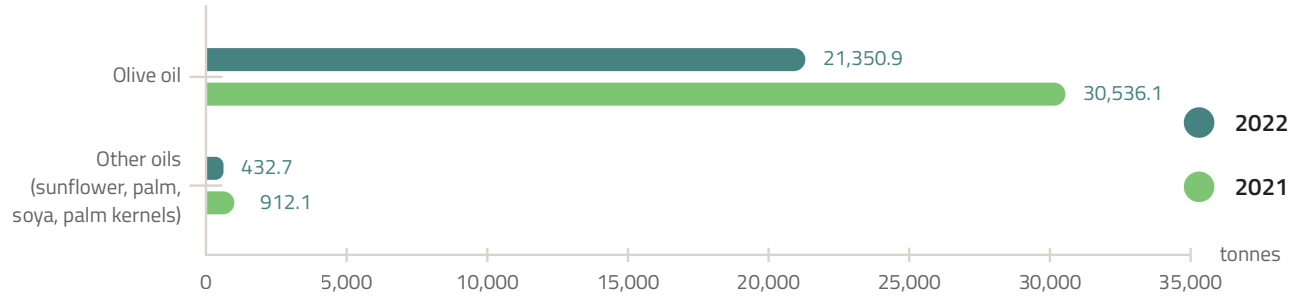
Geographical area	Country	Soya beans	Soya meal	Peanuts	Linseed	Sunflower	Other industrial crops	Total industrial crops
Africa	Burkina Faso	1,712.8	-	-	-	-	-	**1,712.8**
	Egypt	-	-	200.1	54.0	-	73.1	**327.2**
	Ethiopia	-	1.079.1	-	-	-	38.0	**1,117.1**
	Ghana	635.7	-	-	-	-	-	**635.7**
	Kenya	-	-	-	-	-	0.6	**0.6**
	Morocco	-	-	-	-	-	44.7	**44.7**
	Nigeria	-	63.2	-	-	-	-	**63.2**
	South Africa	-	-	-	-	-	46.3	**46.3**
	Togo	17,606.3	-	-	-	-	-	**17,606.3**
	Tunisia	-	-	-	-	-	40.6	**40.6**
North America	Canada	-	-	-	-	-	51.0	**51.0**
South America	Argentina	-	-	-	-	-	61.5	**61.5**
	Bolivia	-	-	-	-	-	1.0	**1.0**
	Paraguay	-	-	-	-	-	243.1	**243.1**
	Peru	-	-	-	-	-	9.9	**9.9**
Asia	China	-	-	78.0	-	52.5	346.8	**477.3**
	India	-	-	-	47.2	-	110.3	**157.5**
	Israel	-	-	-	-	-	43.8	**43.8**
	Pakistan	-	-	-	-	-	74.1	**74.1**
Non-EU Europe	Albania	-	-	-	-	-	32.9	**32.9**
	Bosnia and Herzegovina	1,499.8	-	-	-	-	3.1	**1,502.9**
	Moldova	-	-	-	-	132.0	-	**132.0**
	Russia	-	-	-	42.0	-	-	**42.0**
	Serbia	-	-	-	-	379.3	3.4	**382.7**
	Turkey	-	-	-	42.0	37.0	134.8	**213.8**
	Ukraine	1,243.7	-	-	43.0	-	15.0	**1,301.7**
	United Kingdom	-	-	-	-	-	0.1	**0.1**
Total		**22,698.3**	**1,142.2**	**278.1**	**228.2**	**600.8**	**1,374.1**	**26,321.9**

Source: Compilation by SINAB on TRACES data

Vegetable oils and fats

Imports of vegetable oils and fats primarily consisted of olive oil, with other oils imported in very small amounts **(Chart 4.10 and Table 4.6).** As in recent years, olive oil was again exclusively imported from Tunisia in 2022 **(Table 5.6)** although a 30% drop was reported.

Chart 4.10
Volumes of organic vegetable oils and fats imported to Italy from third countries, by product category
2021 and 2022
Tonnes



Source: Compilation by SINAB on TRACES data

Table 4.6

Volumes of organic vegetable oils and fats imported to Italy from third countries, by product category and country of origin

2022

Tonnes

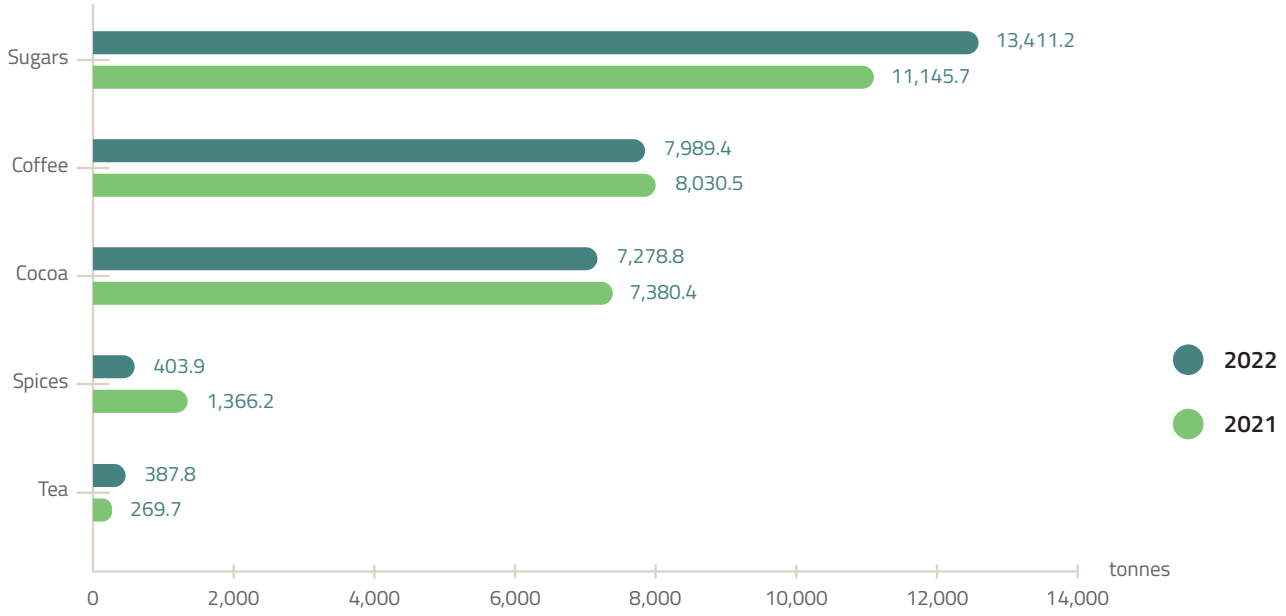
Geographical area	Country	Olive oil	Other oils	Total Vegetable oils and fats
Africa	Ivory Coast	-	22.9	**22.9**
	Kenya	-	36.0	**36.0**
	Morocco	-	8.8	**8.8**
	South Africa	-	0.8	**0.8**
	Tunisia	21,350.9	-	**21,350.9**
North America	United States	-	30.5	**30.5**
South America	Chile	-	1.4	**1.4**
	Paraguay	-	18.0	**18.0**
Asia	China	-	17.1	**17.1**
	India	-	7.0	**7.0**
	Indonesia	-	54.0	**54.0**
	Sri Lanka	-	159.9	**159.9**
	Thailand	-	0.0	**0.0**
Non-EU Europe	Serbia	-	76.3	**76.3**
	United Kingdom	-	0.0	**0.0**
Total		**21,350.9**	**432.7**	**21,783.6**

Source: Compilation by SINAB on TRACES data

Coffee, cocoa, sugar, tea, and spices

Sugar, coffee, and cocoa were the most imported products in 2022 in their category **(Chart 4.11).** Imports of organic sugar in 2022 increased by +20.3% compared to last year, due to a rise in exports from Africa (Mozambique), Central America (Costa Rica and Guatemala mainly) and North America (Mexico and Canada in particular) **(Table 4.7).** Compared to 2021, imports of coffee and cocoa decreased slightly (-1.2% and -0.5%, respectively), while a significant drop was observed for spices, (-70.5%), mainly due to a decrease in exports from Peru.

Chart 4.11
Volumes of organic coffee, cocoa, sugars, tea, and spices imported to Italy from third countries by product category
2021 and 2022
Tonnes



Source: Compilation by SINAB on TRACES data

Table 4.7

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

2022

Tonnes

Geographical area	Country	Coffee	Tea	Spices	Sugars	Cocoa	Total Coffee, Cocoa, Sugar, Tea, and Spices
Africa	Congo	725.9	-	-	-	534.5	**1,260.4**
	Egypt	-	-	35.0	-	-	**35.0**
	Ethiopia	143.9	-	-	-	-	**143.9**
	Ivory Coast	-	-	-	-	97.6	**97.6**
	Madagascar	-	-	1.6	-	48.0	**49.6**
	Mozambique	-	-	-	734.4	-	**734.4**
	Rwanda	-	10.0	-	-	-	**10.0**
	Tanzania	105.3	-	-	-	-	**105.3**
	Uganda	406.2	-	-	288.0	2,631.9	**3,326.1**
Central America	Costa Rica	-	-	-	621.6	-	**621.6**
	Cuba	63.5	-	-	528.0	-	**591.5**
	Guatemala	60.5	-	-	168.0	-	**228.5**
	Honduras	1,852.8	-	-	-	-	**1,852.8**
	Nicaragua	289.8	-	-	-	24.5	**314.3**
	Dominican Republic	-	-	-	-	2,275.7	**2,275.7**
North America	Canada	-	-	-	111.0	-	**111.0**
	Mexico	488.5	-	-	176.2	-	**664.7**
	United States	-	-	-	1.9	-	**1.9**
South America	Argentina	-	-	-	53.4	-	**53.4**
	Brazil	5.3	-	7.0	1,550.0	-	**1,562.3**
	Colombia	50.3	-	-	4,998.8	6.1	**5,055.2**
	Ecuador	-	-	-	379.5	37.6	**417.1**
	Paraguay	-	-	-	1,612.0	-	**1,612.0**
	Peru	3,627.1	-	202.7	674.0	1,622.4	**6,126.1**
Asia	Cambodia	-	-	-	18.0	-	**18.0**
	China	19.2	69.3	5.0	187.2	-	**280.7**
	Philippines	-	-	-	320.6	-	**320.6**
	Japan	-	23.1	-	-	-	**23.1**
	India	103.7	259.5	132.8	241.2	-	**737.3**
	Indonesia	28.2	-	12.5	17.6	-	**58.3**
	Pakistan	-	-	-	347.6	-	**347.6**
	Sri Lanka	-	4.9	0.2	-	-	**5.1**
	Taiwan	-	0.0	-	-	-	**0.0**
	Thailand	-	-	-	382.0	-	**382.0**
	Vietnam	-	-	7.0	-	-	**7.0**
Europa non Ue	Bosnia and Herzegovina	-	-	5.0	-	-	**5.0**
	Turkey	-	-	2.0	-	-	**2.0**
	United Kingdom	-	20.9	-	-	0.5	**21.4**
Oceania	Australia	-	-	0.0	-	-	**0.0**
	Papua New Guinea	19.2	-	-	-	-	**19.2**
Total		**7,989.4**	**387.8**	**403.9**	**13,411.2**	**7,278.8**	**29,471.0**

Source: Compilation by SINAB on TRACES data

Other processed products

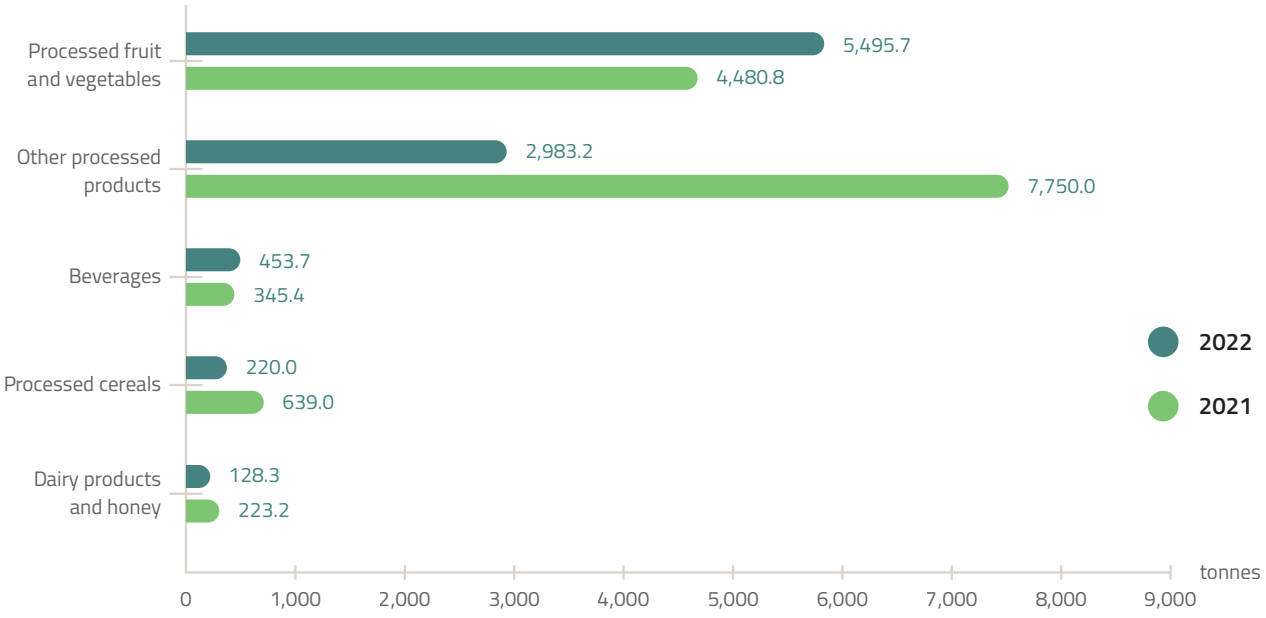
Compared to 2021, there was a sharp drop in the category of processed products, mainly due to lower imports of 'other processed products' from the United Kingdom and Sri Lanka, a group that includes a wide range of products classified as food preparations not elsewhere specified or included **(Chart 4.12).** Imports from the UK of sugar confectionery not containing cocoa decreased, while a reduction in coconut milk imports from Sri Lanka was also recorded **(Table 4.8).** In contrast, imported volumes of processed fruit and vegetables, mostly from Turkey, increased substantially in 2022 compared to the previous year (+22.6%). Small changes in imports in terms of absolute amounts were recorded for products such as beverages (+31.3%), processed cereals (-34.3%) and dairy products and honey (-42.6%).

Chart 4.12

Volumes of organic processed products imported to Italy from third countries, by product category

2021 and 2022

Tonnes



Source: Compilation by SINAB on TRACES data

Table 4.8

Volumes of organic processed products imported to Italy from third countries, by product category and country of origin

2022

Tonnes

Geographical area	Country	Processed fruit and vegetables	Processed cereals	Dairy products and honey	Beverages	Other processed products	Total processed products
Africa	Egypt	0.4	-	-	-	-	**0.4**
	Ghana	25.2	-	-	-	-	**25.2**
	Mali	18.8	-	-	-	-	**18.8**
	Morocco	22.3	-	-	-	18.5	**40.7**
	South Africa	161.6	-	-	0.5	-	**162.1**
	Tunisia	-	-	-	-	44.8	**44.8**
North America	Canada	21.4	-	-	-	-	**21.4**
	Mexico	309.5	-	3.6	11.1	263.9	**588.2**
	United States	-	-	-	-	8.3	**8.3**
South America	Argentina	-	-	0.0	321.6	-	**321.6**
	Brazil	388.4	-	-	-	8.8	**397.2**
	Chile	-	-	-	11.2	0.3	**11.5**
	Ecuador	70.8	-	-	-	43.6	**114.4**
	Paraguay	-	-	-	-	130.9	**130.9**
	Peru	-	-	-	-	71.9	**71.9**
	Uruguay	-	-	-	-	49.1	**49.1**
Asia	Azerbaijan	20.0	-	-	-	-	**20.0**
	Cambodia	-	-	-	-	72.0	**72.0**
	China	-	-	43.5	-	346.1	**389.6**
	Philippines	143.6	-	-	-	-	**143.6**
	Japan	5.3	14.0	-	5.2	70.2	**94.7**
	India	124.9	-	-	-	61.6	**186.5**
	Israel	43.2	82.5	-	-	0.3	**126.0**
	Pakistan	-	-	-	-	3.2	**3.2**
	Palestine	-	23.3	-	-	-	**23.3**
	Sri Lanka	23.8	-	-	-	1,162.4	**1,186.2**
	Thailand	-	1.5	-	-	11.9	**13.5**
	Vietnam	-	-	-	-	12.5	**12.5**
Non-EU Europe	Albania	-	-	-	-	22.5	**22.5**
	Bosnia and Herzegovina	48.8	-	-	100.4	108.2	**257.4**
	Russia	-	-	-	-	23.0	**23.0**
	Serbia	60.0	-	80.9	-	0.8	**141.7**
	Turkey	3,910.7	88.0	-	-	0.8	**3,999.5**
	United Kingdom	97.0	10.7	-	2.9	446.0	**556.5**
Oceania	Australia	-	-	-	-	1.7	**1.7**
	New Zealand	-	-	0.2	1.0	-	**1.2**
Total		**5,495.7**	**220.0**	**128.3**	**453.7**	**2,983.2**	**9,280.9**

Source: Compilation by SINAB on TRACES data

CONCLUSIONS

THE ITALIAN ORGANIC SECTOR IN 2022

For the Italian organic sector, 2022 is a year of transition towards a promising relaunch of the industry and its reputation towards new balances and new development goals.
Over the past twelve months, the sector has been at the forefront of the EU and national policy, as well as the focus of analysts and experts looking for new ways to address critical issues that threaten to become structural, and to overcome unpredictable market pressures.
At EU level, the new EU agricultural policy has allocated significant resources to the development of the sector, considering its contribution to the green transition of European agri-food systems to be undeniable and therefore worthy of support.
Approximately 426 million euros are allocated annually to rural development measures to support organic farming. This is the richest measure, accounting for 5.8% of the total of the CAP National Strategic Plan (NSP) and 13.3% of the second pillar. In addition, several measures, such as the first-pillar eco-schemes and CMOs and the second-pillar investment and cooperation aid, favour the sector in terms of access and contribution levels.
At the Italian level, the approval of the long-awaited Law No. 23 of 9 March 2022 "Provisions for the protection, development and competitiveness of agricultural, agri-food and aquaculture production using organic methods" has also marked the start of the definition of the national strategy through the National Action Plan for Organic Production, a three-year planning tool strongly advocated at EU level for all Member States to accompany and ensure the growth of organic agriculture across the continent.
Currently, the Italian Action Plan for Organic Production is in the starting blocks, having completed the process of listening to all stakeholders, regions and civil society, who were consulted in August 2022.
The Italian Action Plan, based on the European model, envisages three axes of intervention plus a crosscutting axis for the digitalisation of the organic sector, for a total of sixteen planning actions that will be supported by various funding lines from Community resources and sector-specific national funds. The plan's actions are aimed at improving the sector's product range and market positioning, with a view to achieving a fair balance. In this respect, among the most eagerly awaited innovations are the introduction of the Italian organic brand, actions for the aggregation of supply chains and districts, and the development of the knowledge system.
As mentioned above, in 2022 the sector is affected not only by policy and regulation, but also by market volatility. It is hit by political, social, economic and climatic events that strongly influence decisions, behaviour and expectations for the future, constantly changing the familiar and predictable paradigms of market performance and also greatly reducing the temporal validity of estimates and forecasts. The first clear effect is the great difficulty in regaining momentum in domestic demand.
However, organic farms are more confident about the future than their conventional counterparts. The Confidence Climate Index, a tool used by ISMEA to measure farm confidence and expectations, shows an overall negative perception of farm performance, common to both organic (-3.2%) and conventional (-5.1%) farming, which can be explained by the uncontrollable increase in farm costs related to energy and the purchase of raw materials. However, as was the case last year, the 'future situation' component of organic farms is particularly optimistic (+9.5%), which bodes well for the development of supply.
The structural growth of the organic sector is confirmed by the monitoring results presented and analysed in this publication, which show an overall positive picture for the year 2022.
The 7.5% increase in organic area by 2022 and the increase in the number of operators in the system reassure us that we are still in a growth phase and have not yet reached the dreaded break-even point where new operators compensate for farms leaving the certified system. If the coming years confirm such increases, it will be possible to exceed not only the target of 25% certified area by 2030 set by the Farm to Fork strategy, but also the more ambitious target set by the Italian Strategic Plan for the CAP, which aims to reach this target three years earlier.
This is a wish backed up by the figures, but it needs to be read carefully to ensure that the national development strategy for the sector is consistently realistic, coherent and focused, and to avoid the risk of achieving a victory at a great cost.
Firstly, the more than 163,000 additional hectares compared to 2021 are not all the same. Permanent grassland accounts for 47% of the increase, but permanent crops, especially olive trees (+26,000 ha), also make a significant contribution. Organic vineyards (+7.5 thousand ha), a sector in which production techniques are no longer an obstacle to expansion, show growing interest among producers.

Figures for some categories are less enthusiastic, with insufficient supply despite market interest. These include vegetables (-220 hectares) and fresh fruit, which increased by only 2.8%, with around 1.2 thousand hectares. Field technicians and farm operators have no difficulty in explaining these trends when they are linked to specific crops and different farming practices. For example, certifying vegetables requires production factors, techniques, technologies and skills that are not always available on the market, and the risk of losing a share of production is unacceptable given the high unit costs of production and the increasing frequency of destructive weather events.

Finally, a factor influencing the evolution of the area in our country is the timing of the regional calls for tenders to support organic farming in the framework of the rural development of the regions; from this point of view, 2021 and 2022, the last years of the programming, are characterised by a large number of publications.

In this respect, a parallel can be found between the increase in areas and the number of RDP applications in a number of areas where the organic sector is well represented. In Sicily, for example, more than 70,000 hectares are reported in 2022, a 22% increase at least partly due to the publication of a new M11 notice which was late. Growth rates above the national average, linked to the new rural development funds, are also recorded in Apulia (+34 thousand hectares) and Sardinia (+21 thousand hectares). These three regions together account for almost 80% of the increase in cultivated areas.

In terms of operators, 2022 confirms the close correlation between the growth of organic holdings and areas. This link is reflected in the convergence of growth rates. Among the different categories, primary production holdings are the most developed while the processing chain is in decline, even though it is precisely at this stage that the Italian organic sector is able to generate the highest added value.

On the other hand, livestock holdings deserve special attention, as they have shown volatile trends in recent years and have performed below the sector's expectations. The new figures are once again encouraging and are characterised by progress in all the main production sectors, except for the sheep and goat sectors.

It is fair to assume that the farms, like the land, have benefited from the support provided by the RDPs; in this case, however, the impetus that rural development can give to conversion is less pronounced, since running an organic farm requires a radical change in the farm's approach and, in most cases, a costly upgrading of facilities.

Rather, the 2022 momentum coincides with a broader focus on sustainable animal husbandry practices that the CAP PSP intends to pursue with the implementation of Eco-scheme 1 for the reduction of antimicrobial resistance and animal welfare. As such, organic certification is a passport for direct access to Eco-scheme Level II, which would otherwise require enrolment in the National Quality System for Animal Welfare ('SQNB'). In some territorial and production contexts, particularly in the most inland and disadvantaged areas, the organic model may be easier to adopt and better suited to the needs of livestock production. If what has been described so far is the structural situation, an analysis of the market highlights some critical issues.

Organic imports and market trends are related variables. Regarding the former, 2022 confirms the downward trend of the previous year. Surprisingly, the magnitude of the fall in the volume of non-EU[1] cereals crossing the Italian border (-22% or 12,000 tonnes) has wiped out durum wheat imports in just three years. Industrial crops and vegetable oils and fats also have also been volatile. The decline is due to lower volumes of soya derivatives and olive oil.

In general, the 2022 analysis for imports is characterised by an opposite trend for organic products compared to the total agri-food trade, which on the contrary marks a record +27.2% compared to the previous year, unless flows are diverted from non-EU to EU production.

There are several reasons for this phenomenon: increased Italian sourcing of certain categories of goods (e.g., cereals and fruit and vegetables), difficulties in sourcing certified goods and organising logistics in less developed geographical areas which will be affected by major market pressures in 2022 and, finally, low domestic consumer demand. At the same time, domestic market volumes have not grown for two years.

The year 2022 is characterised by a positive sign and, if we look at the five-year period, the trend of organic purchases by households is still growing if we exclude the Covid period.

However, the growth in the value of domestic demand remains sluggish; a zero point that does not compensate for inflation and is not in line with the increase observed for the entire agribusiness sector. These concerns are compounded by the now well-documented fact that, for the first time, there is also a weak market response in the major European organic consuming countries. This is confirmed by the estimates for France and Germany (-4.6% and -4.1% respectively in value terms). The first indications for 2023 give hope of a much-needed turnaround, not least because of the strength that Italian organic products have historically been able to express in exports.

However, these results need to be put into perspective. If the stagnation in consumption were to be wrongly attributed to a single cause, it would undoubtedly have to be blamed on the new-found attention paid by buyers to the price variable and the search for low costs. This trend is confirmed by Nielsen 2022 data (35% of consumers in 2022 shopped in discount or low-cost stores), which shows the growing importance of saving in the choices of consumers who are more concerned about the future and their spending power.

While consumer prices for organic products are bound to rise in line with raw material, production and distribution costs, the rate of increase is generally lower than that for conventional products. The price of organic products remains higher than their counterparts, but the gap on the shelf is narrowing due to a production environment that is not heavily dependent on foreign raw materials and that relies heavily on the sector's ability to work with shorter supply chains.

Among other things, changing and more aggressive trade policies, aimed at generating sales even at the cost of a few percentage points of margin, can also contribute to the consumer price levels. The effects of these policies can spill over and affect the weaker links in the chain.

This can be seen in the analysis of farm-gate prices. In this case, prices have risen in 2022, but not by as much as for conventional products. Indeed, it is striking how common products in Italy, such as wheat, have surpassed conventional prices in some turbulent 2022 sales periods, effectively making the organic product uncompetitive.

However, the slowdown in demand after years of buoyant growth is also due to the confusion caused by the presence of brands and claims that have invaded the space previously occupied by organic products in the consumer imagination.

Several qualitative surveys carried out in recent years among Italian household buyers have revealed a renewed need for information and clarification on the specificity of organic products. This has been the driving force behind the design of a multi-channel institutional communication campaign by ISMEA aimed at raising awareness and informing Italian household buyers about organic certification and the recognition of the "Euroleaf".

The sectoral organisations have also strengthened their promotion and information strategy in the light of this recognised priority. They are coordinating initiatives with a strong consumer appeal and are involving key players in the supply chain who were previously only marginally involved, such as large retailers and caterers. A revitalisation of the sector is therefore possible. The coherence of a regulatory framework for the whole system, the implementation of the actions of the National Action Plan and a concerted communication strategy to raise awareness of the sustainable 'qualities' of organic food and to provide clarity, information and confidence in the organic certification system are all opportunities to help the organic sector face new critical challenges, not least climate change, which is likely to have an impact on both supply and demand in the sector.

On the production side, in fact, extreme weather events weaken agricultural production. While organic farming is an important tool for prevention, because it allows for a better soil structure and therefore better protection against hydrogeological risks, where it has been practised for a long time and according to specific criteria, in the event of a full-blown disaster, organic farming tends to lack the appropriate tools to limit the damage. Plant protection products, for example, do not withstand rainfall, leaving crops unprotected during all-too-frequent events such as the recent floods in Emilia-Romagna.

Given the complexity of this scenario, which is not hypothetical but real, the sector needs to improve its capacity to supply new certified plant material and seeds to restart production, as well as support for the relaunch of production facilities, technologies and scientific research, and to rely on the dissemination of clear information on the value of organic farming.

MINISTERO DELL'AGRICOLTURA
DELLA SOVRANITÀ ALIMENTARE
E DELLE FORESTE

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