

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## Italy

**Post:** Rome

### Organic Agriculture in Italy 2011

**Report Categories:**

Organic Products

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**Report Highlights:**

Report is an update of FAS Rome GAIN IT8019.

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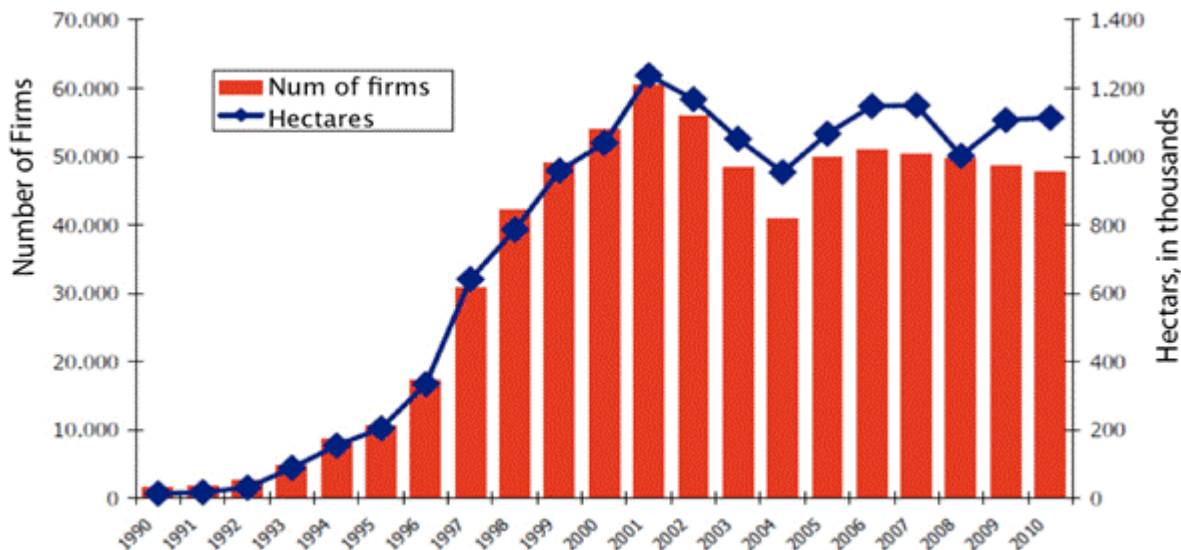
## I. General Information

Organics are an important and growing sector in Italian agriculture. In recent years, domestic purchases of organic products have shown an increase. A survey made by ISMEA (Institute of Services for the Agricultural and Food Market) in 2010 showed a growth of 11.6 percent in purchases of organic products in Italy since 2009. Fresh and processed fruit and vegetables, dairy products and nonalcoholic drinks represent alone half of organic food sales in Italy. The term “biologico” in Italy describes what is known as “organic” agriculture in the United States.

## II. Organic Production in Italy

The Italian organic sector follows EU organic standards and applies EC Regulation 834/07 on organic production and processing methods, labeling, marketing, inspection, and import requirements. The latest data released by the Italian National Information System on Organic Agriculture (SINAB) on organically cultivated land report a stable trend for 2010 with 1.113 million hectares. Italy leads Europe in the number of certified organic producers (47,663) and is second to Spain for cropland. The Italian organic industry mainly produces grains, olive tree, fruits (including shell fruit), vineyards, citrus fruit, and vegetables. Overall, organic livestock production has remained steady, with the exception of the 2008 decline in sheep production and the recent steep growth of organic poultry production.

**Fig. 1. Number of Organic Farms and Organic Cultivated Land Area in Italy 1990-2010**



Source: SINAB.

**Fig. 2. Organic Area (hectares) in Italy by Crop from 2007 to 2010**

	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
<b>Grain</b>	241,430	231,569	251,906	194,974
<b>Industrial Crops</b>	25,210	15,340	14,842	14,864
<b>Vegetables</b>	39,803	29,825	30,275	27,920
<b>Forage Plants</b>	358,610	205,758	179,439	197,774
<b>Fruits</b>	40,221	25,856	23,318	22,196
<b>Citrus</b>	22,062	24,531	32,106	23,424
<b>Olives</b>	109,992	114,472	139,675	140,748
<b>Grapes</b>	36,684	40,480	43,614	52,273
<b>Pasture</b>	219,438	224,601	170,801	189,864

Source: SINAB

The table below shows the number of individual animals within each organic livestock group from 2006-2010.

**Fig. 3. Organic Livestock Production (head)**

<b>Animals</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>
<b>Cattle</b>	222,725	244,156	216,476	185,513	207,015
<b>Pigs</b>	29,736	26,898	34,014	25,961	29,441
<b>Sheep</b>	852,115	859,980	1,007,605	658,709	676,510
<b>Goats</b>	90,591	93,876	83,411	74,500	71,363
<b>Poultry</b>	1,571,310	1,339,415	2,157,201	2,399,885	2,518,830
<b>Bees(#in Hive)</b>	85,489	112,812	102,280	103,216	113,932

Source: SINAB

### III. Organic Consumption in Italy

Italian consumption of organic products continues to grow, and is valued at around €3 billion. On average, Italians spend €25 each per year on organic products. Italians view organic products as "healthier" and "safer" than traditional ones, and therefore, are willing to pay the price premium.

**Fig 4. Household consumption of various categories of organic products**

	<b>VAR. % 2009/2008</b>	<b>VAR. % JAN-NOV'10 / JAN- NOV'09</b>
Fresh or processed produce	26.6%	5.0%
Dairy	-1.9%	12.2%
Breakfast products	-2.7%	18.6%
Drinks	5.7%	10.6%
Eggs	21.8%	7.7%
Bread, substitutes, pasta, rice	8.7%	13.5%
Baby products	-15.7%	36.1%
Oils	-3.3%	8.1%
Honey	14.0%	21.4%
Frozen products	4.5%	-4.4%
Other products	11.0%	17.7%

<b>Total Organic Products</b>	<b>6.9%</b>	<b>12.1%</b>
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\*Data for 2009 is only from the first half of the year

Source: SINAB

### **Organic Prices**

The price premium for organic products varies considerably by product. The table below shows the percent change in price from 2010-2011 of both organic and conventional produce.

**Fig. 5. Percent Difference in Price of Organic vs. Conventional Produce from 2010-2011**

	<b>Organic</b>	<b>Conventional</b>
<b>Vegetables</b>		
Artichokes	106.3%	-6.9%
Fennel	70.0%	22.6%
Potatoes	15.8%	62.9%
Zucchini	-29.2%	-46.0%
Cauliflower	0.0%	-10.1%
<b>Fruit</b>		
Oranges	87.5%	48.6%
Clementine	0.0%	---
Pears	---	25.4%
Kiwi	-28.3%	17.2%
Lemons	10.7%	-4.7%

\*Percent Change from March 2010 to March 2011

Source: ISMEA

### **Organic Distribution Channels**

Organic products are distributed in Italy through three major channels: wholesalers, large supermarket chains, and specialty stores. The table below shows consumption trends of organic products in Italy through different types of stores.

**Fig. 6. Percent Change in Domestic Consumption of Organic Products by Distribution Channel**

	<b>% Change 2009/2008</b>	<b>% Change 2010/2009</b>
<b>Grocery stores</b>	5.4%	3.7%
<b>Big supermarkets</b>	13.5%	18.2%
<b>Traditional stores</b>	-40.9%	29.3%
<b>Discount stores</b>	15.7%	14.9%
<b>Other stores</b>	-8.9%	4.2%

Source: ISMEA

### **Organic School Canteens**

Following the 2000 Italian Finance Law, which recommended the adoption of organic meals in public administration canteens, 26% of organic wholesale purchases were made by communal canteens and schools. This law has helped increase the number of schools that choose to serve organic food.

Figure 7 and 8 represent the number of organic school canteens in the different regions of Italy.

ORGANIC SCHOOL CANTEENS IN ITALY		
MENSE SCOLASTICHE BIO IN ITALIA		
2010		
Region/Regione	n.	%
PIEMONTE	52	6,0
VALLE D'AOSTA	1	0,1
LIGURIA	30	3,4
LOMBARDIA	142	16,3
TRENTINO-ALTO ADIGE	59	6,8
VENETO	106	12,2
FRIULI-VENEZIA GIULIA	68	7,8
EMILIA-ROMAGNA	147	16,9
<b>NORTH/NORD</b>	<b>605</b>	<b>69,4</b>
TOSCANA	118	13,5
MARCHE	28	3,2
UMBRIA	7	0,8
LAZIO	38	4,4
<b>CENTRE/CENTRO</b>	<b>191</b>	<b>21,9</b>
ABRUZZO	13	1,5
MOLISE	1	0,1
CAMPANIA	8	0,9
PUGLIA	18	2,1
BASILICATA	21	2,4
CALABRIA	4	0,5
<b>SOUTH/SUD</b>	<b>65</b>	<b>7,5</b>
SICILIA	3	0,3
SARDEGNA	8	0,9
<b>ISLANDS/ISOLE</b>	<b>11</b>	<b>1,3</b>
<b>ITALY/ITALIA</b>	<b>872</b>	<b>100,0</b>

Source/Fonte: Bio Bank [www.biobank.it](http://www.biobank.it)



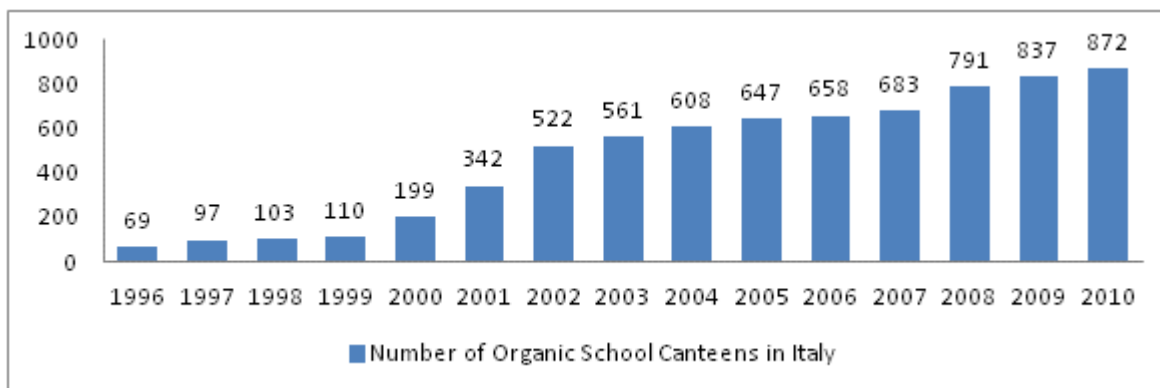
**Fig. 7. Number of Organic School Canteens table**

Source: Bio Bank

**Fig. 8. Number of Organic School Canteens Map**

Figure 9 illustrates the increase in the number of organic school canteens in Italy from 1996 to 2010.

**Fig. 9. Organic School Canteen Trend**



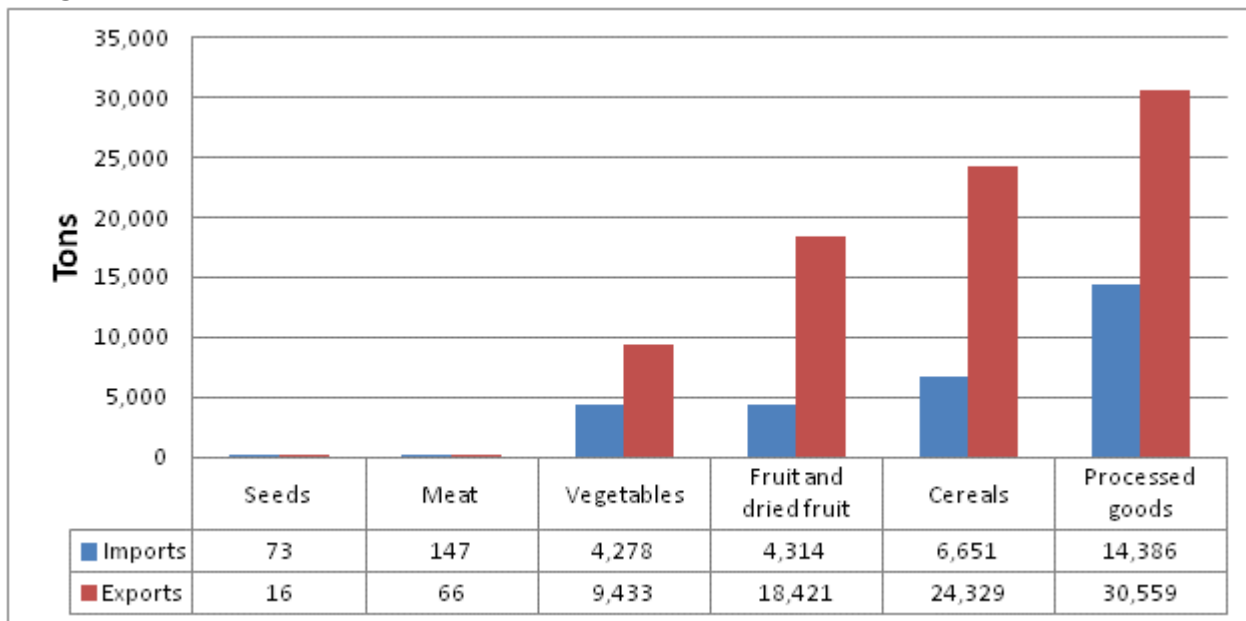
Source: Bio Bank

#### IV. Organic Trade in Italy

Official intra-EU organic trade data is difficult to track. The presence of free trade agreements within EU Member States (as well as between non-EU countries with equivalency standards) limits the availability of official data. However, the Italian Ministry of Agriculture reports that in 2010 Italy imported from extra-EU countries 74,000 tons of organic goods. Cereals are mainly imported from Canada, Kazakhstan, Thailand, and Netherlands, fruits from South America and vegetables from Central America.

Italy is a net exporter of organic food (mainly processed) with most of its €900 million production shipped to foreign markets. The majority of the exports are shipped to other EU Member States (mainly Germany), the United States and Japan.

**Fig. 10. Import/Export of organic products in Italy: 2011 survey on 567 import/export firms.**



Source: Federbio 2011

According to a survey made by Federbio, Italian exports outside Europe are limited to processed organic food, with irrelevant exceptions. Fruit (especially citrus) and vegetables are exported almost exclusively to European countries (both EU and non-EU). The United States and Canada import more than half of the Italian organic exports of wine.

#### **Organic Certification**

Italy and the United States currently do not have an equivalency agreement for organic products. Presently a product that is USDA Organic certified is not necessarily considered organic in Italy and vice versa. An American organic product must be certified EU Organic to be sold in Italy. The USDA Organic label can stay on the product, however, if it is not certified EU Organic, it will not be sold in the organic section of supermarkets, but will instead be sold next to the conventional

products.

### ***Certification for the EU***

In order to be recognized as an organic producer in EU, a farmer has to be subject to a two years long transformation process from traditional to organic production. During this period, inspections can be done without notice, in order to check the conformity with the required standards. After two years, the production can be considered "organic," but inspections will still be held at least once a year.

The responsibility of controlling the coherency between the organic production and EU standards falls on single State Members, which can delegate to specific organizations, both public and private.

Organic productions, in order to be certified as such, must follow specific rules. Although the legislation is very specific, it could be summarized in a few, focal points:

- Wide crop rotation as a prerequisite for an efficient use of on-site resources
- Prohibition of parallel production of organic and non-organic agriculture on the same farm unit
- Very strict limits on chemical synthetic pesticide and synthetic fertilizer use, livestock antibiotics, food additives and processing aids and other inputs
- Absolute prohibition of the use of genetically modified organisms
- Taking advantage of on-site resources, such as livestock manure for fertilizer or feed produced on the farm
- Choosing plant and animal species that are resistant to disease and adapted to local conditions
- Prohibition of use of any substance not clearly specified in the EU regulations.
- Raising livestock in free-range, open-air systems and providing them with organic feed
- Using animal husbandry practices appropriate to different livestock species

The EU allows the use of antibiotics for the treatment of sick animals (when all other methods fail). Although every State Member has the possibility to apply a more restrictive legislation than the communitarian one on organic production, the current Italian situation is characterized by the mere adoption of European regulations.

### ***Labeling in the EU***

Organic products are marked with a specific label, which is uniform throughout the whole EU. All EU Produced packaged organic products must apply the label, but it is optional for imported products.

EU organic logo





Detailed regulations can be found in the EU website:

[http://ec.europa.eu/agriculture/organic/organic-farming/what-organic\\_en](http://ec.europa.eu/agriculture/organic/organic-farming/what-organic_en)

<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2007:189:0001:0023:EN:PDF>

<http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2008:264:0001:0002:EN:PDF>

### ***Certification for the U.S.***

As for the European Union, the production of organic food is regulated also in the U.S. In order to be able to define a product "organic" and apply on it the organic label, this must be certified as such by the United States Department of Agriculture National Organic Program (USDA NOP).

Although the principles of what is organic are shared between EU and the U.S., there are some minor differences. The main are:

- the possibility to set parallel productions of organic and conventional agricultures on the same farm unit
- the absolute impossibility to use antibiotics for curing feedstock
- the different regulation on the use of materials for the organic production, which allows farmers to use any *natural* input that is not specifically prohibited and prohibits the use of any *synthetic* one that is not specifically allowed.

The USDA inspects and certifies organic standards through private and state agencies. Small farmers with less than \$5,000 in organic sales can avoid the certification process, but they are still required to comply with the government standards. Individuals or companies who sell or label a product as organic when they know it does not meet USDA standards, can be fined up to \$10,000 for each violation.

### ***Labeling in the U.S.***

If a food bears a USDA Organic label, it means it's produced and processed according to the USDA standards and that at least 95 percent of the food's ingredients are organically produced. The seal is voluntary, but many organic producers use it.

Products that are completely organic — such as fruits, vegetables, eggs or other single-ingredient foods — are labeled 100 percent organic and can carry a small USDA seal. Foods that have more than one ingredient, such as breakfast cereal, can use the USDA organic seal or the following wording on their package labels, depending on the number of organic ingredients:

- **100 percent organic.** Product that is completely organic or made of all organic ingredients.

- **Organic.** Product that is at least 95 percent organic.
- **Made with organic ingredients.** Product contains at least 70 percent organic ingredients. The organic seal cannot be used on these packages.



Products certified 95 percent or more display this USDA organic sticker.

### ***Import Procedures for U.S. Products***

To import U.S. organic products to the EU, importers must work through their designated member state authority and obtain an import authorization. These authorizations are granted on a case-by-case basis, subject to the member state's review of two main elements: the organic standards and inspection measures applied by the certifier of the product, and the certifier's compliance with EN 45011 or ISO Guide 65.

The importer must demonstrate that the product was produced according to EU standards and provide evidence that the certifier is accredited to EN 45011/ISO 65 by an authority recognized by the member state. In the U.S., the USDA's Agriculture Marketing Service (AMS) has been designated as the competent authority to accredit U.S. organic certifiers for compliance with ISO 65.

Certifiers of U.S. organic products must use the EU certificate format for products to be exported to the EU. An original certificate must accompany the good and it will be verified at the border by the member state authorities. Goods are not released until the authorities have verified that a valid import authorization has been granted for the consignment. Member states have several options for implementing the regulation, which means that procedures may differ from member state to member state.

### ***Export Procedures for Italian Products to the U.S.***

Italian organic exports to the U.S. must be certified as such. In the "Certifier Lists" section of this report, there is contact information of the six accredited certifying agents in Italy that certify for the USDA National Organic Program.

### ***List of major organizations concerning organic sector, production, information, etc.***

The CRA (Consiglio per la Ricerca e Sperimentazione in Agricoltura) is a national research institute that operates under the supervision of the Italian Ministry of Agriculture. Its website is <http://sito.entecra.it/>.

SINAB (Sistema d'Informazione Nazionale sull'Agricoltura Biologica), was developed for the collection and distribution of statistics on the Italian organic sector. SINAB is run by IAM.B (the Mediterranean Agronomic Institute of Bari), a center for post-graduate training and applied scientific research. More information is available at [www.sinab.it](http://www.sinab.it) and [www.iamb.it](http://www.iamb.it). These three institutes also provide various statistics on organic agriculture in Italy. Their websites are [www.ismea.it](http://www.ismea.it), [www.istat.it](http://www.istat.it), [www.inea.it](http://www.inea.it).

AIAB (Associazione Italiana per l'Agricoltura Biologica) is a non-profit organization and is the largest organic farming association in Italy. In 2000, AIAB co-founded ICEA, an organic certifier/control body for the AIAB quality seal "Garanzia AIAB." ICEA is an accredited organic certifier by the Italian Ministry of Agriculture. AIAB's website is: [www.aiab.it](http://www.aiab.it).

SINCERT (Sistema Nazionale per l'Accreditamento degli Organismi di Certificazione e Ispezione) is a non-profit organization recognized by the Italian government. It accredits organic certifiers in conformance to UNI CEI EN 45011. SINCERT's website is [www.sincert.it](http://www.sincert.it).

IFOAM (International Federation of Organic Agriculture Movements) is an international umbrella organization of organic agriculture. IFOAM's members include farmer organizations and international certification agencies. One of IFOAM's goals is the development of a universal standard for organic agriculture. The IFOAM Basic Standards for Organic Production and Processing and IFOAM Accreditation Criteria for Bodies Certifying Organic Production and Processing have served as guidelines for private and governmental agencies in setting regional standards. IFOAM's website is [www.ifoam.org](http://www.ifoam.org).

In August 2005, a consortium of Italian certification bodies developed the "Italian Organic Standards," a set of regional organic standards that are consistent with the IFOAM Basic Standards and Council Regulation 2092/91.

***List of accredited certifying agents in Italy that can certify for the USDA National Organic Program***

**Bioagricert**

Via Facini, 10  
40033 Casalecchio di Reno (BO), Italy  
Contact: Dr. Riccardo Cozzo  
Phone : +39 051 6130512  
E-mail : [info@bioagricert.org](mailto:info@bioagricert.org)  
Scope: crop, livestock, wild crop, handling  
Accredited: 1/8/03

**Bios s.r.l.**

International Office  
Via Monte Grappa, 37/C  
36063 Marostica (VI), Italy  
Contact : Mariella Sandini  
Phone : +39-0424-471125  
Fax. +39-0424-476947  
E-mail: [info@certbios.it](mailto:info@certbios.it)  
Website: <http://www.certbios.it>  
Scope: crop, livestock, wild crop, handling  
Accredited: 05/23/05

CCPB - Consorzio Per Il Controllo Dei Prodotti Biologici

Via J Barozzi 8

40126 Bologna, Italy

Contact: Roberto Setti

Phone: +39 516089811

E-mail: [ccpb@ccpb.it](mailto:ccpb@ccpb.it)

U.S. Contact for Business in Europe: Donato Grosser

Phone: 212-661-0435

E-mail: [grosser@att.net](mailto:grosser@att.net)

Scope: crop, livestock, wild crop, handling

Accredited 12/9/02

ICEA - Istituto per la Certificazione Etica ed Ambientale

Via Strada Maggiore, no 29

40125 Bologna (BO), Italy

Contact: Daniela Caretto or Alessandro Pulga

Phone: +39 051-27.29.86

E-mail: [export@icea.info](mailto:export@icea.info)

Scope: crop, livestock, wild crop, handling

Accredited: 04/13/03

Istituto Mediterraneo Di Certificazione (IMC)

Via C Pisacane, 32

60019 Senigalia (AN), Italy

Contact: Giorgio Maria Pittalis

Phone: +39 (0)717928725

E-mail: [imcert@imcert.it](mailto:imcert@imcert.it) or [g.pittalis@imcert.it](mailto:g.pittalis@imcert.it)

Scope: crop, livestock, wild crop, handling

Accredited: 7/21/03

Suolo E Salute S.R.L

Via don Minzoni, S

40037 Sasso Marconi

Bologna, Italy

Contact: Bruno D'Aprile

Phone: +39 051-6751265

E-mail: [assdt@tiscalinet.it](mailto:assdt@tiscalinet.it)

Website: <http://www.suoloesalute.it>

Scope: crop, livestock, wild crop, handling

Accredited: 2/4/03