COLDIRETTI

ENVIRONMENTAL AND TERRITORY AREA

EUROPEAN ECONOMIC AND SOCIAL COMMITTEE

THE FUTURE OF ORGANIC PRODUCTION IN EUROPE

Second panel – National perspectives

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COLDIRETTI

ITALIAN ORGANIC AGRICULTURE IN THE WORLD

- **ITALY IS THE 7th COUNTRY IN THE WORLD FOR ORGANIC PRODUCTION AFTER AUSTRALIA, ARGENTINA, USA, BRAZIL, SPAIN AND CHINA**

- **THE FOURTH EUROPEAN COUNTRY FOR ORGANIC MARKET (1,9 BILLION EUROS – 3,1 INCLUDED EXPORT) AFTER GERMANY, FRANCE, GREAT BRITAIN**

- **THE SECOND EUROPEAN COUNTRY FOR AGRICULTURAL USED AREAS (AUA)**

- **THE FIRST EUROPEAN COUNTRY FOR THE NUMBER OF OPERATORS**

ORGANIC FOOD CONSUMPTIONS

COLDIRETTI

DATA ISMEA/COLDIRETTI

- INCREASING TREND OF NATIONAL CONSUMPTIONS (+ 17%) COMPARED WITH 2013
- THE HIGHEST INCREASING SINCE 2003
- ECONOMIC VALUE: 3,1 BILLIONS OF EUROS

PRODUCTS	TREND
PASTA,RICE, CEREALS PRODUCTS	+73%
SUGAR, COFFEE AND TEA	+ 37,2%
BISCUITS, CAKES AND SNACKS	+ 15,1%
FRESH AND TRASFORMED VEGETABLES	+ 11%
EGGS	+ 5,2%
MILK AND CHEESE PRODUCTS	+3,2
ORGANIC DRINKS	+ 2,5%

45% OF ITALIAN CONSUMERS BUY ORGANIC FOOD

ITALIAN ORGANIC PRODUCTION

SOURCE: DATA SINAB. PROCESSING: COLDIRETTI

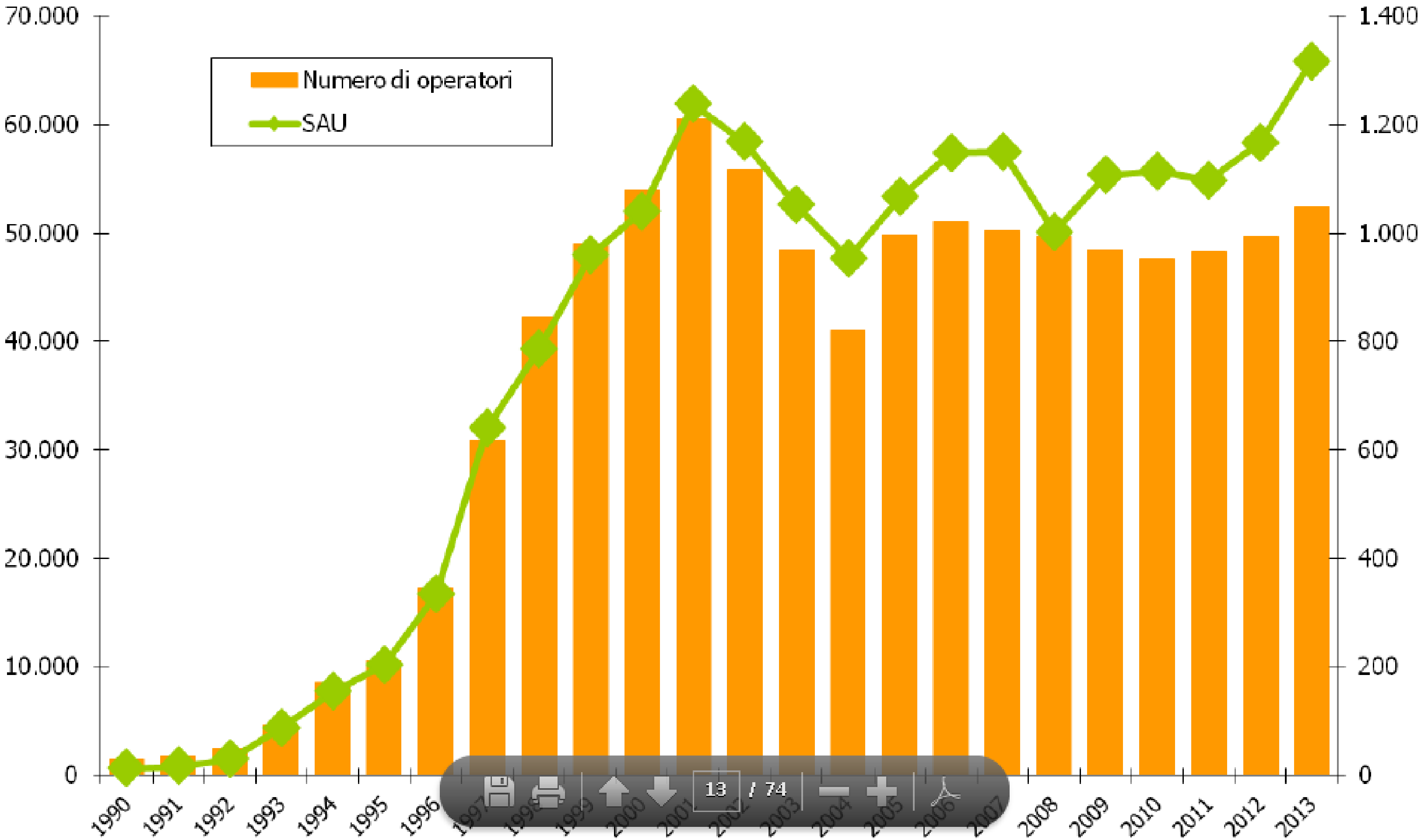
	2000	2013	VARIATION %
ORGANIC AUA	1.040.377 ha	1.317.177 ha	+26,6%
TOTAL OPERATORS:	54.004	52.383	-3%
of which a)FARMERS	49.790	41.513	-16,6%
b)FARMERS DOING TRANSFORMATION TOO	1.330	4.456	+235%
c)ONLY TRANSFORMERS	2.817	6.154	+118,5%
d)IMPORTERS	67	260	+288%

ATTENTION!

- THE NUMBERS OF FARMERS IS DECREASED BUT THE AGRICULTURAL USED AREA IS INCREASED
- THIS MEANS THAT.....
- FARMERS WHO REMAIN IN ORGANIC AGRICOLTURE HAVE WIDED THEIR FARMS

ORGANIC AGRICULTURAL USED AREA AND OPERATORS TREND

operators



thousands Hectares

Source: SINAB REPORT 2014

USED ORGANIC AREAS IN ITALY

CROPS	2000 YEAR (HECTARES)	2013 YEAR (HECTARES)	VARIATION IN PERCENTAGE
GRAZING LANDS	156.826	380.227	+142,4%
FODDER CROPS	402.086	249.000	-38,1%
CEREALS	194.616	191.400	-1,6%
FRUIT* AND VEGETABLES	79.172	123.605	+56,1%
OLIVES	93.863	175.946	+87,4%
VINES	31.249	67.937	+117,4%
SET ASIDE		56.179	
PROTEIN CROPS	13.451	26.909	+100,05%

*FRUIT=NUTS, CITRUS TREES, FRESH FRUIT

DATA SOURCE: SINAB, 2014. DATA PROCESSING: COLDIRETTI.

TREND OF CEREALS PRODUCTION

- **ORGANIC PRODUCTION IS INCREASING BUT SLOWLY, EXCEPT CEREALS**
- **CEREALS FOOD CONSUMPTIONS INCREASE BUT ITALIAN PRODUCTION OF CEREALS DICREASES**
- **IMPORTS OF CEREALS DECREASE TOO....**

- **...SO CEREALS OFFER DOESN’T MEET CEREALS DEMAND IN A SECTOR OF TRADITIONAL ITALIAN FOOD**

LIVESTOCKS

Animali	2007	2008	2009	2010	2011	2012	Var % '12- '11
Bovini	244.156	216.476	185.513	207.015	193.675	**203.823**	*5,2*
Suini	26.898	34.014	25.961	29.411	32.436	**42.872**	*32,2*
Ovini	859.980	1.007.605	658.709	676.510	705.785	**707.623**	*0,3*
Caprini	93.876	83.411	74.500	71.363	72.344	**79.683**	*10,1*
Pollame	1.339.415	2.157.201	2.399.885	2.518.830	2.813.852	**2.824.978**	*0,4*
Equini	8.325	9.903	8.597	9.563	9.548	**9.663**	*1,2*
Api (num. arnie)	112.812	102.280	103.216	113.932	99.260	**128.241**	*29,2*
Altri animali	1.926	2.501	2.948	2.089	1.751	**1.385**	*-20,9*

Total 2007

2.687.388 animals

Total 2012

3.998.268 animals

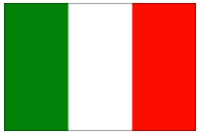
Cattle and sheeps and goats are drecreased, the others animals are increased

ANIMALS TREND 2007-2013

Source: Sinab. Data processing: Coldiretti

ANIMALS	2007	2012	2013	VARIATION % 2013-07
CATTLE	244.156	203.823	231.641	-5,12
PIGS	26.898	42.872	43.318	+61
SHEEPS	859.980	707.623	755.419	-12,1
GOATS	93.876	79.683	92.330	-1,6
POULTRY	1.339.415	2.824.978	3.063.404	+1,3
HORSES	8.325	9.663	13.404	+61
BEES	112.812	128.241	140.004	+3,3
OTHER ANIMALS	1.926	7.751	10.184	+428,7
TOTAL ANIMALS	2.687.388	3.998.268	4.349.704	+61,8

VARIATION 2007-2013= +61,8%



IMPORT

CROPS	2009	2010	2011	2012	2013
CEREALS	23.269,28	43.142,19	50.697,16	13.459,25	6.116,41
INDUSTRIAL CROPS	426,40	9.437,13	45.832,20	7.979,19	21.169,63
NATURAL ABSTACRTS	139,11	701,42	1.041,66	409,53	297,50
VEGETABLES	8.165,34	7.639,65	5.303,58	5.560,17	6.196,80
TRASFORMED FOOD	10.264,26	9.502,90	10.558,36	14.052,37	13.214,69
FRESH FRUIT AND NUTS	7245,16	3..479,38	5.558,62	10.115,96	15.416,83

TONS

Data Sinab

IMPORT: TREND 2009-2013

CROPS	2009-2013 VARIATION %
CEREALS	-73,7
INDUSTRIAL CROPS (soya beans, sunflowers, peanuts)	+4.864,6
NATURAL EXTRACTS	+113,8
ORTAGGI	-24,1
TRASFORMED FOOD	+28,7
FRESH FRUIT AND NUTS	+112,8

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Data Sinab. Processing data Coldiretti

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ITALIAN IMPORTS

1. LATIN AMERICA: fresh fruit,
2. transformed products (coffe and cacao),
3. soya bean, protein pea, rape, kiwi, bananas
4. ASIA: natural abstracts, soya bean
5. EUROPE NON EU: soft and hard wheat, soya bean
6. AFRICA: vegetables, citrus fuirt, potatoes, coffe
7. NORTH AMERICA: wheat
8. CENTRE AMERICA: bananas

USDA ORGANIC

ORGANIC FEDERATION OF UKRAINE

COLDIRETTI

ITALIAN ORGANIC MARKET (source: Biobank)

MARKET VALUE	2007 YEAR	2013 YEAR	VARIATION %
SCHOOL MEALS	924.161	1.196.237	+294
STUDENTS' RESTAURANTS	683	1.196	+75,1
AGRITOURISMS	1.002	1.541	+53,8
DIRECT SALE FARMERS	1.645	2.795	+69,9
SMALL MARKETS	204	234	+14,7
E-COMMERCE WEB-SITES	106	130	+22,6
RESTAURANTS	301	495	+64,5
SHOPS	1.106	1.270	+14,8
PURCHASE GROUPS	356	891	+150,3
SCHOOL FARMS	131	584	+345,8

ORGANIC SUPERMARKETS

Supermarket chains in Italy • Catene di supermercati in Italia

AUCHAN	CARREFOUR	CONAD
COOP	CRAI	DESPAR
ESSELUNGA	GRUPPO PAM	REWE ITALIA
	SELEX	

Organic Supermarket • Supermercati Bio

NATURASI'

Source/*Fonte*: Bio Bank www.biobank.it

Source: Biobank

THE DATA SAY THAT:

- CONSUMPTIONS GROWTHS MORE THAN PRODUCTION
- SMALL INCREASING IN AGRICULTURAL USED AREA
- DECREASING OF TOTAL OPERATORS = -3%
- DECREASING OF ORGANIC FARMERS= -16,6%
- INCREASING OF FARMERS THAT DO TRANSFORMATION TOO
- TRANSFORMERS ARE 3 TIMES MORE THAN IN 2000
- IMPORTERS ARE 4 TIMES MORE THAN IN 2000

WHAT DOES IT MEANS?

DOMESTIC ORGANIC PRODUCTION DOESN'T MEET THE DOMESTIC DEMAND OF ORGANIC FOOD

INCREASING OF IMPORTS

THE REASONS OF A SLOW INCREASING OF PRODUCTION

- ITALIAN PRODUCTION IS STRONGLY LINKED TO DEVELOPMENT RURAL PLAINS (DRP) PAYMENTS

- MOST OF THE DRP NOT SUBSTAINS ALL THE ORGANIC CHAIN (TRANSFOMATION AND MARKETING FACILITIES), BUT ONLY PRODUCTION

- IN THE PERIOD 2000-2013 REGIONAL BUDGETS FOR DRP HAVE DECREASED

- FARMERS WHO HAVE PRODUCED MARKET ORIENTED ARE REMAINED IN THE SYSTEM, THE OTHERS HAVE LEFT ORGANIC AGRICOLTURE

THE NEXT GOALS

THE MOST IMPORTANT ECONOMIC SECTORS IN A FOOD CHAIN ARE FRUIT AND VEGETABLES AND LIVESTOCKS
SO, THE ECONOMIC VALUE OF ORGANIC ITALIAN FOOD CHAIN IS LOW

- **it's necessary to increase production of fruit and vegetables and food obtained by animals (meat, cheeses, milk…) to meet the domestic demand**

FINALLY THE TREND OF THESE SECTORS SEEMS TO GROWTH

HOW TO DEVELOP ITALIAN ORGANIC FOOD CHAIN: WHAT IT'S NECESSARY?

- **INVESTMENTS IN RESEARCH (SEEDS, PHYTOSANITARY PROBLEMS, FEEDING FOR ANIMALS ECC…);**
- **NATIONAL PLAN FOR SEEDS;**
- **NATIONAL PLAN FOR PRODUCING PROTEIN CROPS FOR ANIMALS' FEEDING**

- **USE OF DRP PAYMENTS FOR:**
- **1)INVESTMENTS IN MARKETING AND TRANSFORMATION FACILITIES;**
- **2) REDUCING COSTS OF CERTIFICATION;**
- **3) CREATING A LOGO THAT IDENTIFIES ITALIAN ORGANIC PRODUCTS**

COLDIRETTI’S POSITION ABOUT LEGISLATION REFORM OF ORGANIC AGRICULTURE

COLDIRETTI'S POSITION ABOUT LEGISLATION REFORM OF ORGANIC AGRICULTURE

- **COLDIRETTI SUBSTAINS EU COMMISSION PROPOSAL**
- **QUALITY ORGANIC FOOD: IT'S NECESSARY TO IMPROVE THE STANDARDS OF PRODUCTION**
- **THE AIM MUST BE: TO BECOME WIDER THE DIFFERENCE BETWEEN CONVENTIONAL AND ORGANIC FOOD**
- **COLDIRETTI IS AGAINST DEROGATIONS: IT'S NECESSARY TO OBTAIN A 100% ORGANIC FOOD CHAIN**
- **ORGANIC AGRICOLTURE MUST BE PRACTISED WHERE THERE ARE THE ENVIRONMENTAL CONDITIONS SUITEBLE TO THIS METHOD OF PRODUCTION AND NOT EVERYWHERE**

COMMISSION’S PROPOSAL ABOUT VEGETABLE CROPS: SEEDS

- **IT’S IMPORTANT TO REPEAL THE DEROGATION THAT HAS BEEN AN OBSTACOLE FOR CREATING AN ORGANIC SEED MARKET**
- **IN ITALY MANY CULTIVARS HAVE REACHED THE RIGHT PRODUCTION TO MEET THE DOMESTIC DEMAND (ES. SOFT AND HARD WHEAT)**

COMMISSION'S PROPOSAL ABOUT VEGETABLE CROPS: CONTAMINATIONS

- COLDIRETTI APPROVES THE RULE PROPOSED AGAINST THE INTRODUCTION OF A THRESHOLD FOR CONTAMINANTS

- NO THRESHOLD FOR PESTICIDES CONTAMINATION

BUT

- IN CASE OF CONTAMINATION THE REFUND OF FARMERS SHOULD BE COMPULSORY USING DRP PAYMENTS

COMMISSION'S PROPOSAL ABOUT VEGETABLE CROPS: GMOs

- COLDIRETTI HAS ALWAYS BEEN AGAINST A CONTAMINATION THRESHOLD FOR GMOS

- IT'S NECESSARY TO ASSURE ZERO TOLERANCE

COMMISSION'S PROPOSAL ABOUT ANIMALS

- LIVESTOCKS HAVE A GOOD TREND, BUT IT'S NECESSARY:
- A) TO REPEAL DEROGATIONS IN FEEDING AND BREEDING,
- B) TO INCREASE THE PRODUCTION OF MAIS AND SOYA OGM FREE, USING CAP PAYMENTS;
- C) TO ENCOURAGE THE

CHOICE OF LOCAL RACES SUITABLE FOR ORGANIC SYSTEM OF BREEDING

COMMISSION'S PROPOSAL ABOUT IMPORTS

- COLDIRETTI AGREES WITH THE NEW APPROACH FOR IMPORT OF ORGANIC PRODUCTS BASED ON CONFORMITY AND NOT MORE ON EQUIVALENCE

- WITH THE ACTUAL SYSTEM WE IMPORT ORGANIC FOOD OBTAINED BY COUNTRIES THAT HAVE RULES ONLY APPARENTLY EQUIVALENT TO EU REGULATION.

- THIS IS A FRAUD FOR CONSUMERS AND UNFAIR COMPETITION FOR FARMERS

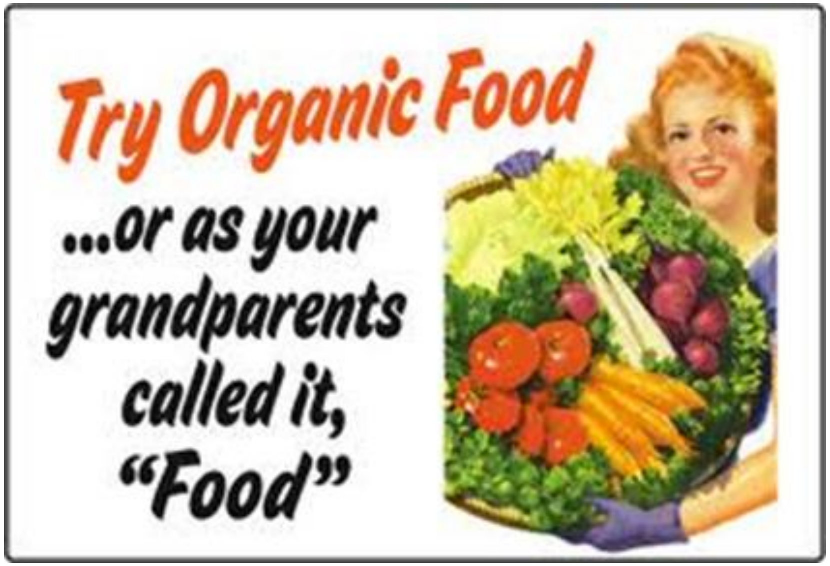
COMMISSION'S PROPOSAL ABOUT CONTROL AND CERTIFICATION SYSTEM

COLDIRETTI SHARES THE CERTIFICATION FOR GROUP OPERATORS

THIS IS COVENIENT FOR SMALL FARMS

IT REDUCES COSTS OF CERTIFICATION

IT SEMPLIFYS BUROCRATIC BURDENS



Web site: www.ambienteterritorio.coldiretti.it/tematiche/Agricoltura-Biologica/Pagine/default.aspx

THANK YOU!