



Voluntary Report - public distribution

**Date:** 5/8/2008

**GAIN Report Number:** IT8019

## Italy

### Organic Products

### Organic Agriculture in Italy

## 2008

**Approved by:**

Robin H. Gray  
U.S. Embassy

**Prepared by:**

Isabel Rosa

---

**Report Highlights:**

Organics are an important and growing sector in Italian agriculture. Italy ranks first in Europe in both number of organic farms and organic cultivated land area. The Italian situation demonstrates the more general notion that while EU policies have influenced the development of organic agriculture in Europe as a whole, member state implementation of EU policies, along with member specific incentives, have had a critical role in the development of the organic sector.

---

Includes PSD Changes: No  
Includes Trade Matrix: No  
Annual Report  
Rome [IT1]  
[IT]

## Table of Contents

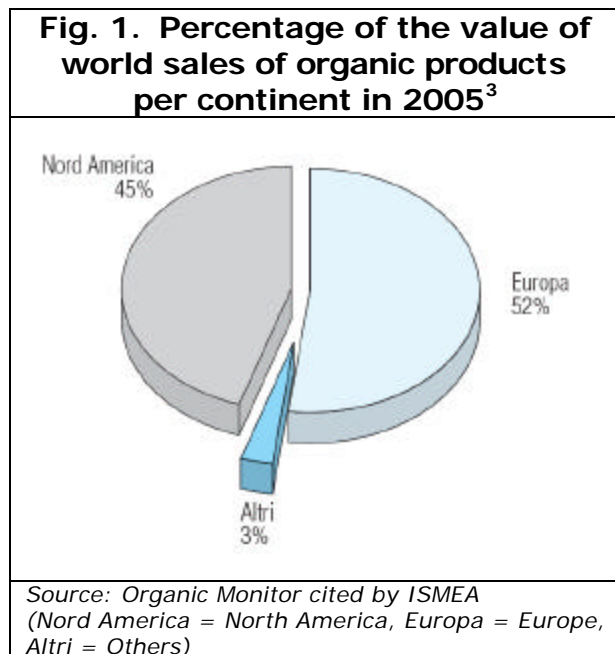
<b>Introduction .....</b>	<b>4</b>
I. Global Context .....	4
II. Italian Statistics and General Summary .....	5
<b>History of Organic Agriculture in Europe.....</b>	<b>5</b>
<b>Regulations .....</b>	<b>5</b>
I. EU .....	5
a. Council Regulation 2092/91.....	5
i. Individual Member state/Italian enforcement .....	6
b. Council Regulation 1804/99.....	6
c. Council Regulation 834/2007 .....	6
i. Differences between Council Regulation 2092/91 and Council Regulation 834/2007 - GMO Presence in Organic Products.....	7
d. CAP Reforms - Organic Subsidies .....	8
i. CAP and Italian Organic Farms .....	8
e. UNI CEI EN 45011 – General Requirements for Assessment and Accreditation of Certification/Registration Bodies Council Regulation 1804/99 ..	9
II. Italy .....	10
a. Decreto legislativo 220 del 1995 – Organic certification .....	10
b. Legge 23 Dicembre 1999, n. 488 – Organics in schools and hospital .....	10
c. Decreto ministeriale del 27/12/2007 – Organic Research Funds.....	11
<b>Organics in Italy .....</b>	<b>11</b>
I. History .....	11
II. Current Trends.....	12
a. Organic Crop Production Area .....	12
b. Organic Livestock Production .....	13
c. Organic Operations by Geographic Area (North, Center, South, Islands) .....	13
<b>Italian Market Data .....</b>	<b>15</b>
I. Imports .....	15
II. Exports .....	17
III. Domestic Consumption.....	17
IV. Price Premium .....	18
V. Price Elasticity of Demand.....	19
VI. Distribution Channels .....	20
<b>Certification in Italy .....</b>	<b>21</b>
I. For EU .....	21
II. For Import/Export with the US .....	21
a. Import Procedures for US Products.....	21
b. Export Procedures for Italian Products to the US .....	22
<b>Italian Organizations .....</b>	<b>22</b>
I. Public .....	22
a. CRA .....	22
b. SINAB.....	22
c. ISMEA, ISTAT, INEA .....	23
II. Private.....	23
a. AIAB and ICEA.....	23
b. SINCERT .....	23
<b>International Organizations .....</b>	<b>23</b>
I. IFOAM.....	23
a. IFOAM in Italy .....	23
<b>EU Organic Logo .....</b>	<b>24</b>
<b>Certifier Lists .....</b>	<b>25</b>

- I. List of the 15 accredited certifying agents in Italy  
that can certify EU Organic ..... 25
- II. List of the 6 accredited certifying agents in Italy  
that can certify for the USDA National Organic Program ..... 27

**Introduction**

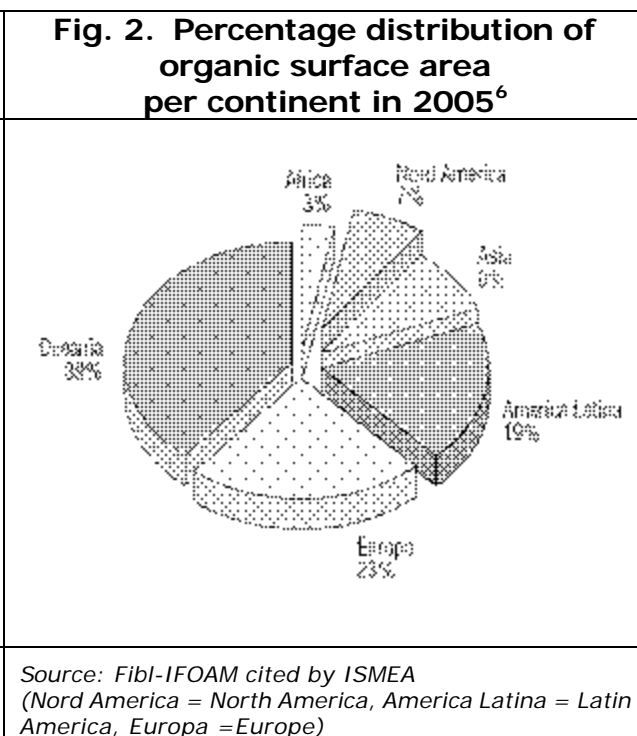
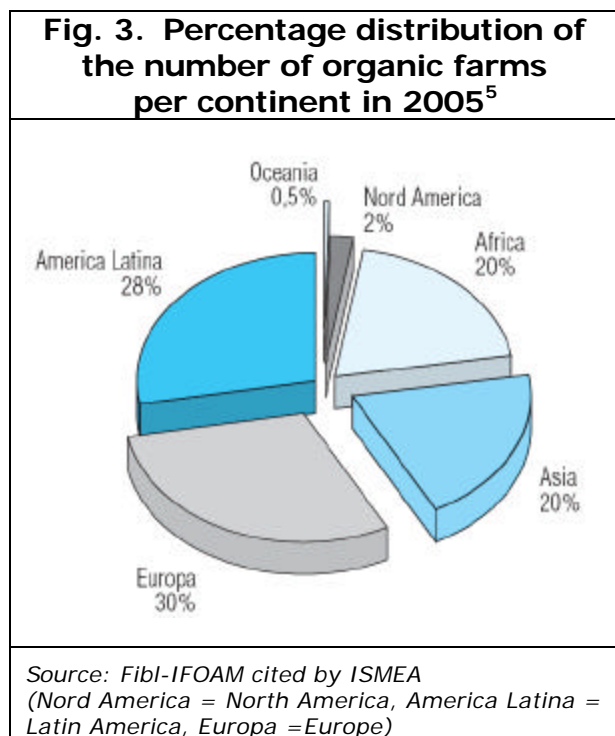
**I. Global Context**

Europe and North America accounted for approximately 97% of the value of organic sales worldwide in 2005 (fig. 1).<sup>1</sup> Europe had 52% of sales and North America had 45% (fig. 1). In recent years, Europe has been gaining global percentage of organic sales while North America has been losing global percentage.<sup>2</sup> But that is not to say that sales in North America have declined, they just have not kept up with the growth in European sales.



Although most organic products are consumed in Europe and North America, organic surface area and number of organic farms on these continents is not proportional to organic consumption. There is an asymmetry between where organic products are consumed and where they are produced.<sup>4</sup>

In 2005, Oceania (Australia) accounted for 39% of organic surface area (fig. 2) and 0.5% of organic farms worldwide (fig. 3). Europe accounted for 23% of organic surface area (fig. 2) and 30% of the number of organic farms worldwide (fig. 3). North America accounted for 7% of organic agriculture area (fig. 2) and 2% of organic farms worldwide (fig. 3).



## II. Italian Statistics and General Summary

Organics are an important and growing sector in Italian agriculture. Italy ranks first in Europe in both number of organic farms and organic cultivated land area.<sup>7</sup> With approximately 50,000 organic farms, Italy ranks second in total number of organic farms worldwide, after Mexico.<sup>8</sup> With over 1.07 million hectares in organic farming, Italy ranks fifth in organic land area worldwide.<sup>9</sup> With 8.4 % of its total agricultural area in organic farming, Italy ranks fourth in proportion of agricultural land in organic farming worldwide.<sup>10</sup> The number of organic farms and organic cultivated land area in Italy has varied in recent years due to EU Common Agricultural Policy (CAP) reforms and changes in how Italy implements the CAP.

The term “biologico,” or biological, is used in Italy to describe what is known as “organic” agriculture in the United States. Italy follows the EU organic standard. Thus, for a product to be identified as organic in Italy, it must comply with Council Regulation 2092/91 which covers organic production and processing methods, labeling and marketing, inspection, and imports from third countries.<sup>11</sup>

### History of Organic Agriculture in Europe

Organic farming comes from the theory and practice of alternative methods of agricultural production, mainly from Northern Europe in the early twentieth century. There have been three important movements in the development of what is currently known as organic agriculture: *biodynamic* agriculture, *organic* agriculture, and *biological* agriculture. Rudolf Steiner developed *biodynamic* agriculture in Germany in the 1920s. The term *organic* agriculture originated in England, based on the theories developed by Albert Howard in his *Agricultural Testament* of 1940. Hans-Peter Rusch and Hans Muller developed *biological* agriculture in Switzerland.<sup>12</sup> Muller used the term *organischbiologischer Landbau* (organic - biological farming) for the first time in 1949.<sup>13</sup>

The common feature of these movements, which are the source of the current EU regulations on organic agriculture, is the emphasis on the essential link between farming and nature. The focus is on promoting natural equilibria rather than maximizing yields through the use of synthetic products.<sup>14</sup>

In the 1960s a significant number of conventional farms in Europe converted to organic farming practices. Since the 1990s, the development of organic agriculture in the EU has been supported by financial subsidies.<sup>15</sup> The first EU organic regulation, Council Regulation 2092/91, was adopted in 1991, came into force in 1992, and will remain in effect until January 1, 2009.<sup>16</sup>

### Regulations

#### I. EU a. Council Regulation 2092/91

Council Regulation 2092/91 was adopted in 1991 and came into force in 1992.<sup>17</sup> This regulation was last updated in January 2007 and will remain in effect until January 1, 2009, at which time Council Regulation 834/2007 will take its place. Therefore, currently for a product to be identified as organic in Italy, it must comply with Council Regulation 2092/91 which covers organic production and processing methods, labeling and marketing, inspection, and imports from third countries.<sup>18</sup>

Some of the requirements under Regulation 2092/91 for a product to be labeled as organic are:

- at least 95% of the ingredients of agricultural origin of the product are, or are derived from, organic products (Art. 5, 3 (a))
- the product cannot include GMO ingredients (Art. 13)
- the product must comply with the rules of the official inspection scheme;
- the product must come directly from the producer or preparer in a sealed package;
- the product must bear the name of the producer, the preparer or vendor and the name or code of the inspection body

#### **i. Individual Member state/Italian enforcement**

Council Regulation 2092/91 (Art. 14) established the Standing Committee on Organic Farming (SCOF), made up of representatives from all member states, to aid in applying and amending the regulation. Each member state in turn had to establish a competent authority in organic agriculture in their state.

In Italy, there are two delegated competent authorities: the Ministry of Agriculture (Ministero delle Politiche Agricole Alimentari e Forestali – MiPAAF) and the regional administrations.

The Ministry of Agriculture established the Organic Agriculture Office (Ufficio Agricoltura Biologica) within the Administrative Office for the Quality of Agricultural Products and Consumer Safety. In addition, the Ministry of Agriculture set up two committees, one to advise the Ministry on organic and eco-compatible agriculture, and the other to evaluate the organic control bodies.

The regional administrations are the competent authorities on regional development policies and are responsible for inspecting the control bodies (organic certifiers) that are authorized by the Ministry of Agriculture.<sup>19</sup> The “Certification” section of this report provides more information on the certification process in Italy.

#### **b. Council Regulation 1804/99**

As a supplement to Council Regulation 2092/91, Council Regulation 1804/99 addresses organic livestock production, foodstuffs, disease prevention and veterinary treatments, animal welfare, husbandry practices, and the management of manure.<sup>20</sup> After the introduction of Council Regulation 1804/99, many farmers with organic pastures became organic breeders. There has been significant growth in extensive organic livestock production (i.e. sheep, goats, horses) and in fast growing animals (i.e. chickens). Conversely, the shift from conventional to organic has been rather slow in intensive production (i.e. beef, veal, pork) because breeders tend to find organic breeding much more restrictive than conventional methods.<sup>21</sup>

#### **c. Council Regulation 834/2007**

Council Regulation 2092/91, and its supplementary Council Regulation 1804/99, was repealed by Council Regulation 834/2007 of 28 June 2007. Council Regulation 834/2007 will be applied beginning 1 January 2009.

### i. Differences between Council Regulation 2092/91 and Council Regulation 834/2007 - GMO Presence in Organic Products

Council Regulation 2092/91 (Art. 13) prohibits the use of GMOs and GMO derivatives in organic products, allowing only for a "*de minimus*" threshold for unavoidable contamination." "De minimus" is subject to interpretation, and has been interpreted to mean the minimum detectable level, as well as higher levels. Since the regulation is enforced at the member state level, there was concern that different interpretations were leading to conflicting applications of the regulation.

Italy has taken a zero-tolerance stance regarding GMO contamination in organic products. Zero-tolerance means the threshold minimum detectable level.<sup>22</sup> The Italian Minister of Agriculture, Paolo De Castro, has advocated zero-tolerance for GMOs in organics at the European Union Agricultural Council.<sup>23</sup> However, the Italian position of zero-tolerance is the minority view in Europe. One of the arguments against zero-tolerance is that it would increase the costs of organic production and thereby impede the growth of the organic market.<sup>24</sup> On 12 June, 2007 European agriculture ministers reached a favorable vote on Council Regulation 834/2007 which set a 0.9% tolerance of GMO contamination in organic products.<sup>25</sup>

Council Regulation 834/2007 sets out the principle that "GMOs and products produced from or by GMOs are incompatible with the concept of organic production and consumers' perception of organic products" and "therefore should not be used in organic farming or in the processing of organic products" (Pmb. para. 9). "The aim is to have the lowest possible presence of GMOs in organic products. The existing labeling thresholds [0.9%] represent ceilings which are exclusively linked to the adventitious and technically unavoidable presence of GMOs" (Pmb. para. 10).

All food products containing or consisting of GMOs, produced from GMOs or containing ingredients produced from GMOs must be labeled even if they no longer contain detectable traces of GMOs.<sup>26</sup> The existing labeling thresholds for adventitious and technically unavoidable presence are found in Council Regulation 1829/2003 regarding GMO food and feed.<sup>27</sup> Council Regulation 1830/2003 applies jointly with Council Regulation 1829/2003 and specifically addresses traceability standards for GMOs.<sup>28</sup>

Council Regulation 1829/2003 provides for a threshold for the adventitious or accidental presence of GM material in non-GM food or feed sources. This threshold is set at 0.9% and only applies to GMOs that have an EU authorization. The temporary threshold of 0.5% for the presence of GMOs not yet authorized but that received a favorable assessment from an EU scientific committee expired in April 2007.

"The threshold is **not** a provision for lack of due diligence or intentional mixing of GM and non-GM. It will be for the operator to produce evidence to show that presence of GM is adventitious or technically unavoidable e.g. through the use of suitable identity preservation systems. The threshold is applied at the level of each individual ingredient and **not** the final food."<sup>29</sup>

Both Council Regulation 2092/91 (Art. 6, 1 (d)) and Council Regulation 834/2007 (Art. 4 (a) (iii)) provide an exception for GMO and/or GMO-derived veterinary medicinal products.

#### **d. CAP Reforms – Organic Subsidies**

The Council Regulations on organic farming were introduced as part of the reform of the EU's Common Agricultural Policy (CAP). By the late 1980s the CAP had broadly achieved its original aim of generating agricultural productivity gains to help the EU become more self-sufficient in its food supply.<sup>30</sup> The policy then shifted towards other aims, such as high quality products and the integration of environmental conservation into agriculture.<sup>31</sup>

The EU CAP supports organic agriculture through green payments (payments to farmers for providing environmental services) for converting to and continuing organic farming. The EU commission establishes the general framework and co-financing, and each member state chooses a set of policies from this menu of measures.<sup>32</sup>

The economic rationale for these subsidies is that organic production provides benefits that accrue to society and that farmers lack incentives to consider social benefits when making production decisions. In such cases, payments can more closely align each farmer's private costs and benefits with societal costs and benefits.<sup>33</sup>

The 1992 CAP reform (Council Regulation 2078/92) provided the policy framework for EU member states to support organic farming, and many of the payments currently granted were implemented under this reform, dating back to 1994. In 1998, the organic support measure accounted for 27.5% of the total Council Regulation 2078/92 agro-environmental expenditure. About 175.2 million Euros were paid to 539,528 hectares (about 325 Euros/hectare).<sup>34</sup>

The 2000 CAP reform was carried out from 1999 to 2001. This reform included new measures in the rural development program (Council Regulation 1257/99). In 2001, the EU-15 spent almost 500 million Euros (559 million dollars; the average annual exchange rate for 2001 was 1 dollar = 0.895 Euros) on organic land, with organic farms receiving average payments of 183-186 Euros (204-208 dollars) per hectare, compared with 89 Euros (99 dollars) per hectare paid to conventional farms.<sup>35</sup>

#### **i. CAP and Italian Organic Farms**

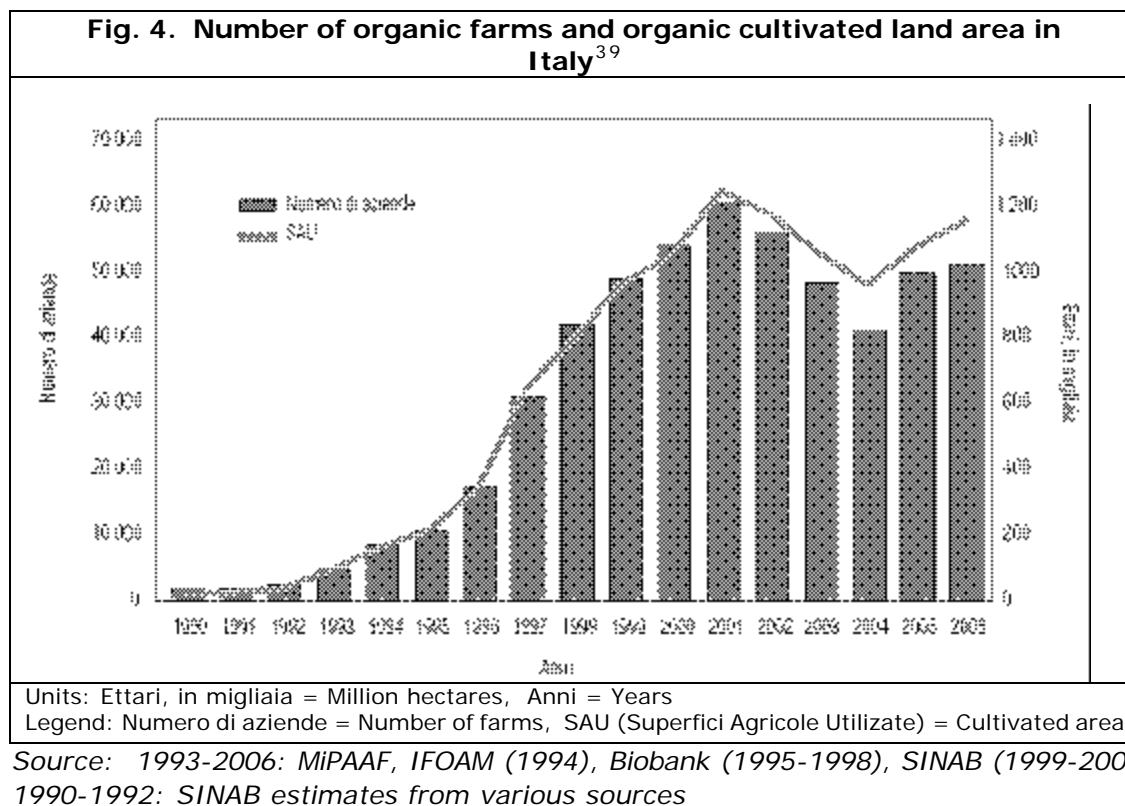
From the late 1990s to 2001, Italian organic agriculture experienced consistent growth both in number of farms and cultivated land area. In the 1990s, the growth in the organic sector was not evenly distributed throughout the regions. The bulk of producers, as well as land entering the organic market (i.e., land shifting from conventional to organic systems), were mostly located in southern regions.

In 2001, with 12% growth in the number of farms and 19% growth in cultivated area, Italy experienced its highest growth in the organic sector since the start of the EU organic program. However, from 2002-2004, the number of organic farms and cultivated area decreased because of a shortage in EU subsidies supporting organic farming.<sup>36</sup> Compared to 2001, the change in the number of farms ranged from -8% in 2002 to -15% in 2004. The change in cultivated land area ranged from -5.5% in 2002 to -10% in 2004. This decrease has been attributed to progressive effects of the 1992 CAP Reform (Council Regulation 2078/92).<sup>37</sup>

In 2005 the tide changed again with 20.7% growth in number of farms and 11.8% in cultivated land area, compared to 2004.<sup>38</sup> This growth might be related to more government grants for organic farming via the 2000 CAP Reform, under the rural development program



(Council Regulation 1257/99). It seems there is a time lag of several years before the effect of a change in agricultural subsidy policy can be seen in agricultural markets in Italy.



#### e. UNI CEI EN 45011 – General Requirements for Assessment and Accreditation of Certification/Registration Bodies

This regulation dictates how organic certifiers are accredited in the EU. It is the revised European standard EN 45011 (February 1998) for the assessment and accreditation of certification/registration bodies in general, not just organic. UNI CEI EN 45011 is identical to the international ISO/IEC Guide 64 (1996).<sup>40</sup> In Italy, SINCERT (Sistema Nazionale per l'Accreditamento degli Organismi di Certificazione e Ispezione), a non-profit organization legally recognized by the Italian government, accredits a large number of organic certifiers in conformance to UNI CEI EN 45011.<sup>41</sup>

## II. Italy

### a. Decreto legislativo 220 del 1995 – Organic certification

This is the Italian regulation for the control and certification of organic products. The regulation is out of date, however, various attempts have been made to discuss it in Parliament.<sup>42</sup>

### b. Legge 23 Dicembre 1999, n. 488 – Organics in schools and hospitals

Article 59 of the 2000 Italian Finance Law ("Legge Finanziaria 2000," Legge 23 Dicembre 1999, n. 488)<sup>43</sup> requires municipalities and hospitals to use organic food in their catering services.<sup>44</sup> There are several organic school cafeterias, where an organic menu is served to more than 380,000 children in nursery and middle schools located mostly in metropolitan areas (Rome, Bologna, Turin, Padua) but also in smaller towns. However, although the law is compulsory, there is no punishment for failure to comply, "so if parents or organic farmers do not actively advocate for it, the organic catering may not happen."<sup>45</sup>

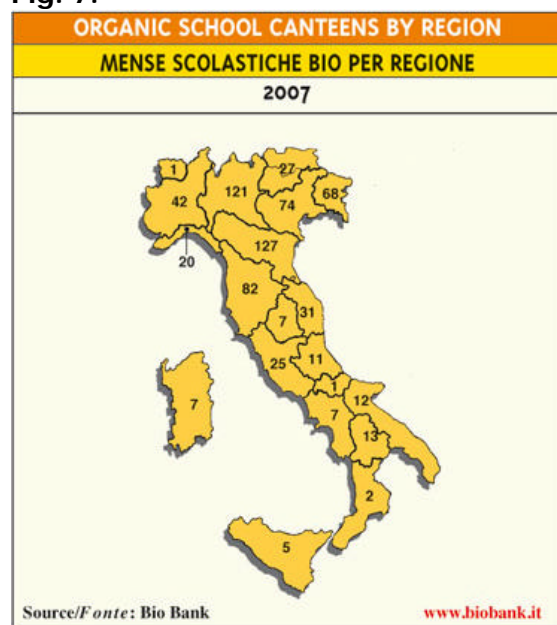
Fig. 5.<sup>46</sup>

ORGANIC SCHOOL CANTEENS IN ITALY		
MENSE SCOLASTICHE BIO IN ITALIA		
2007		
Region/Regione	n.	%
PIEMONTE	42	6,1
VALLE D'AOSTA	1	0,1
LIGURIA	20	2,9
LOMBARDIA	121	17,7
TRENTINO-ALTO ADIGE	27	4,0
VENETO	74	10,8
FRIULI-VENEZIA GIULIA	68	10,0
EMILIA-ROMAGNA	127	18,6
<b>NORTH/NORD</b>	<b>480</b>	<b>70,3</b>
TOSCANA	82	12,0
MARCHE	31	4,5
UMBRIA	7	1,0
LAZIO	25	3,7
<b>CENTRE/CENTRO</b>	<b>145</b>	<b>21,2</b>
ABRUZZO	11	1,6
MOLISE	1	0,1
CAMPANIA	7	1,0
PUGLIA	12	1,8
BASILICATA	13	1,9
CALABRIA	2	0,3
<b>SOUTH/SUD</b>	<b>46</b>	<b>6,7</b>
SICILIA	5	0,7
SARDEGNA	7	1,0
<b>ISLANDS/ISOLE</b>	<b>12</b>	<b>1,8</b>
<b>ITALY/ITALIA</b>	<b>683</b>	<b>100,0</b>

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

Fig. 6.<sup>47</sup>



Fig. 7.<sup>48</sup>Fig. 8<sup>49</sup>

**SCHOOL CATERING IN ITALY**  
**RISTORAZIONE SCOLASTICA IN ITALIA**

2007

Catering company <i>Azienda di ristorazione</i>	meals/year <i>pastil'anno n.</i>	municipality <i>comuni n.</i>	organic food <i>cibo bio %</i>
Avenance Italia (Mi)	11.000.000	57	65
Camst (Bo)	22.000.000	366	60
Cir (Re)	24.200.000	330	65
Dussmann Service (Bg)	1.326.000	13	22
Ep (Na)	800.000	7	2
Eudania (Fi)	9.866.000	65	18
Euroristorazione (Vi)	2.143.000	53	30
Eutourist Serv-System (To)	4.460.000	9	30
Gemeaz Cusin Rist. (Mi)	12.749.000	99	35
Gruppo Onama (Mi)	11.800.000	80	25
Milano Ristorazione (Mi)	15.000.000	1	20
RR Puglia (Ba)	1.400.000	7	85
Serenissima Ristorazione (Vi)	20.000.000	130	15
Serist (Mi)	2.603.000	12	30
Sodexho Italia (Mi)	29.660.000	309	20
Vivenda (Rm)	14.500.000	51	23

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

### c. Decreto ministeriale del 27/12/2007 – Organic Research Funds

This decree came out of the Administrative Office for Rural Development within the Italian Ministry of Agriculture. It was published in the Gazzetta Ufficiale (the Italian equivalent of the Federal Register) on April 18, 2008. The decree allocates 3,922,804 Euros for organic research (Art. 2). Proposals can be submitted by public research entities (such as the universities and government research institutes) and private non-profit research entities (Art. 3). A proposal can request at most 400,000 Euros and must be completed in 3 years (Art. 2).<sup>50</sup>

## Organics in Italy

### I. History

In Italy, the earliest experiences in organic agriculture date back to the 1960s. In the 1970s many farmers began to learn about organic practices. During the mid 1980s, the first local coordination agencies established the "Commissione Nazionale Cos'è Biologico" (National Commission for Organic Agriculture). This commission had representatives from different consumers' associations from each Italian region and established the first nation-wide self-regulatory standards for organic farming.<sup>51</sup> In 1988 the commission changed its name to AIAB (Italian Association for Organic Agriculture).<sup>52</sup> Currently AIAB is the largest Italian association of organic farmers.

After the EU Council Regulation 2092/91 on organic farming was implemented in 1992, several small regional associations of organic farmers, producers, and consumers committees reorganized themselves, joining forces through mergers and a federative network. In 1992, AIAB received official recognition from the Italian Ministry of Agriculture as a certifying body for organic production under Council Regulation 2092/91.<sup>53</sup> AIAB's certifying body is presently known as ICEA (Istituto per la Certificazione Etica e Ambientale). Currently there are 15 officially recognized certification bodies in Italy.<sup>54</sup> The "Certifier Lists" section of this report provides contact information for these bodies.

During the 1990s, the organic sector in Italy experienced one of the largest average annual growth rates in Europe. Between 2002 and 2004 however, the number of farms decreased due to shortage in the EU subsidies supporting organic farming.<sup>55</sup> However, from 2005 onwards the organic sector started to grow again.

## II. Current Trends

From 2005 to present, there has been growth again in the number of organic farms and organic cultivated land area, in particular in southern Italy.

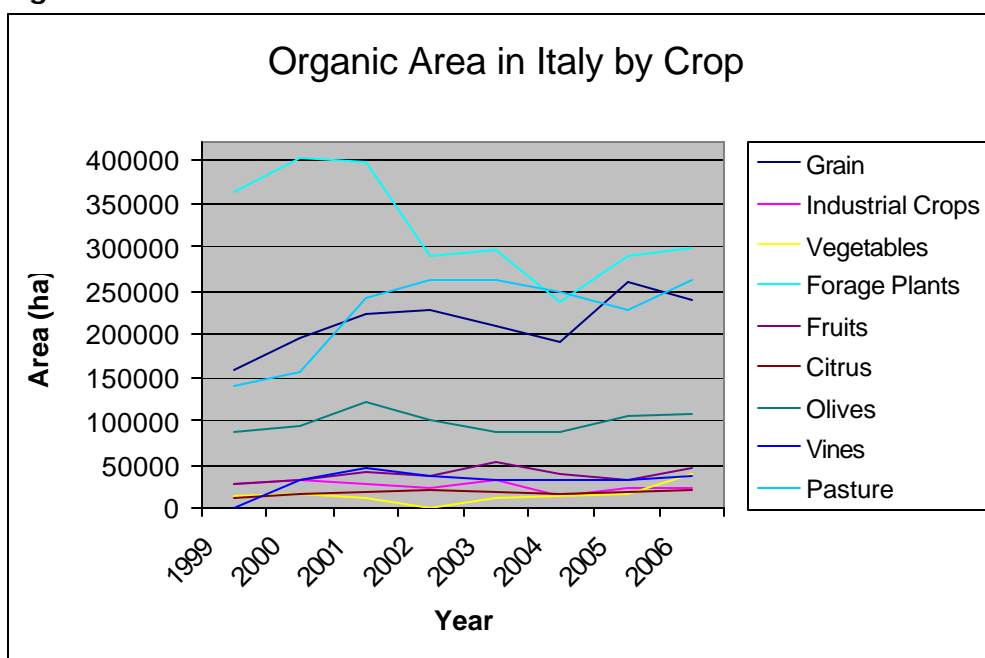
### a. Organic Crop Production Area

**Table 1. Organic Area (hectares) in Italy by Crop from 1999 to 2006<sup>56</sup>**

	1999	2000	2001	2002	2003	2004	2005	2006
<b>Grain</b>	158887	194616	221436	227948	209376	191311	258848	239092
<b>Industrial Crops</b>	28341	32511	27962	23967	32313	14255	23106	23362
<b>Vegetables</b>	12770	16125	11675	12,210	11354	13750	15825	39696
<b>Forage Plants</b>	363884	402086	397878	289009	296997	237431	288927	297441
<b>Fruits</b>	28147	31364	41827	36394	52214	39614	33934	45672
<b>Citrus</b>	12488	15384	18295	18869	16749	15043	18044	19549
<b>Olives</b>	85485	93863	121363	102055	86201	88963	106938	107233
<b>Vines</b>	27,59	31249	44175	37380	31709	31170	33885	37693
<b>Pasture</b>	141747	156826	241157	261263	263003	249096	227610	261252

Source: SINAB - MiPAAF cited by ISMEA

**Fig. 9.**



For most crops, there was a noticeable decline around 2003 and 2004, followed by an increase from 2005 onward. This follows the trend in number of organic farms (fig. 4) that has been attributed to changes in the CAP and its implementation in Italy.

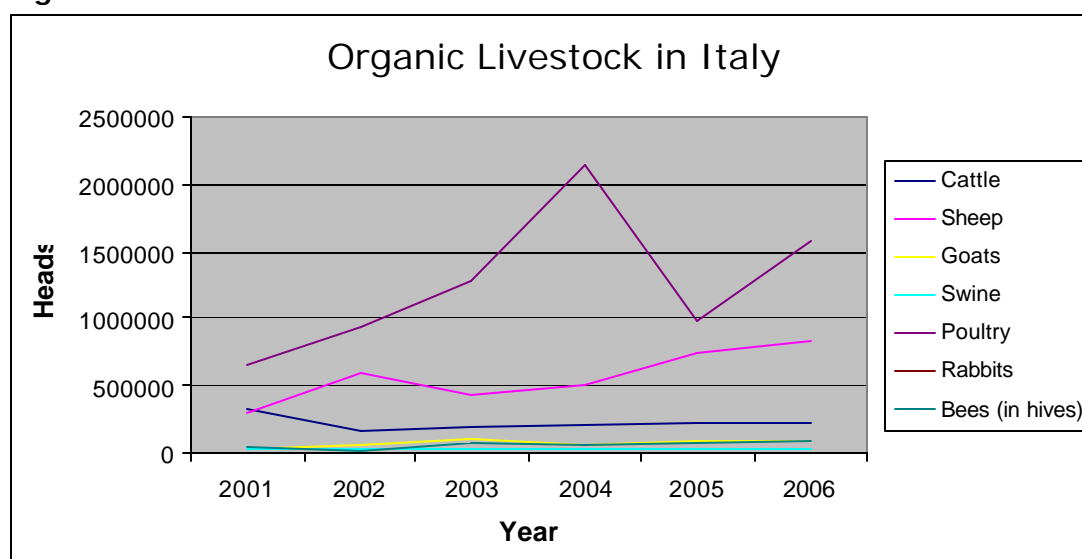
### b. Organic Livestock Production

**Table 2. Number of Heads Raised Organically by Species<sup>57</sup>**

	2001	2002	2003	2004	2005	2006
<b>Cattle</b>	330701	164536	189806	215022	222516	222725
<b>Sheep</b>	301601	608687	436186	499978	738737	825115
<b>Goats</b>	26290	59764	101211	56815	86537	90591
<b>Swine</b>	25435	19917	20513	26508	31338	29736
<b>Poultry</b>	648693	939396	1287131	2152295	977537	1571310
<b>Rabbits</b>	1682	1377	1068	1109	543	2343
<b>Bees (in hives)</b>	48228	6353	76607	67713	72241	85489

Source: SINAB - MiPAAF cited by ISMEA

**Fig. 10.**

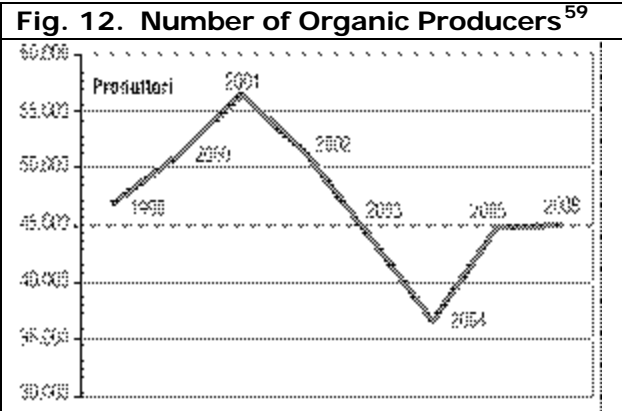
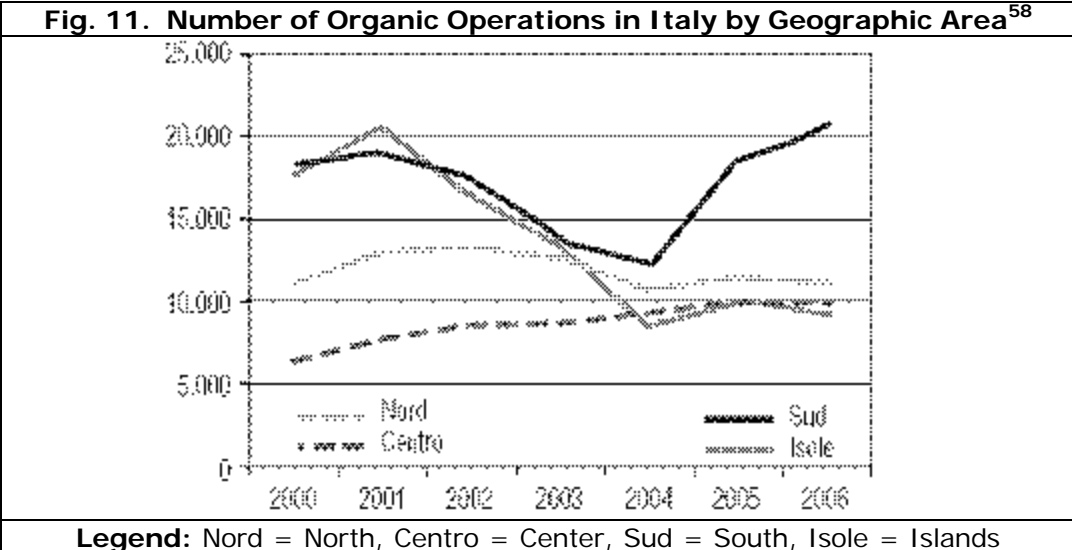


Source: SINAB - MiPAAF cited by ISMEA

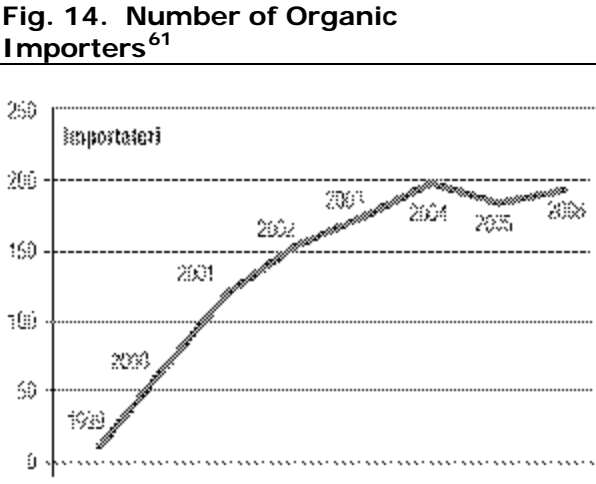
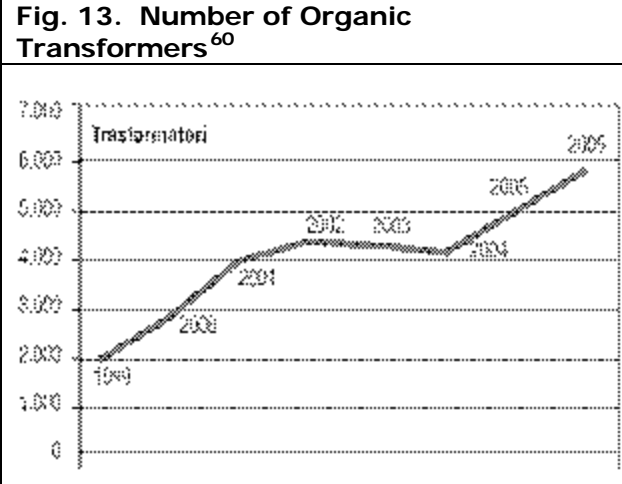
Overall, organic livestock production has been increasing in recent years. Unlike crops, organic livestock is marginally affected by subsidies and therefore shows less variation related to changes in agricultural subsidy policy.

**c. Organic Operations by Geographic Area (North, Center, South, Islands)**

In the last few years there has been a high growth rate in the number of organic operations in southern Italy. Currently, the majority of organic operations are concentrated in the south and in the islands.



There is a clear geographic division of production and commercial activity. Production is concentrated in the south and the islands while processing and commercial activity is concentrated in the north.<sup>1</sup> About 30% of total Italian organic operations are present in the North. The Northern operations represent 50% of total Italian organic processors/transformers and 80% of total Italian organic importers.



Note: Italian numbers use periods in the place of commas and commas in the place of decimal points.

Source: SINAB – MiPAAF in collaboration with OdC

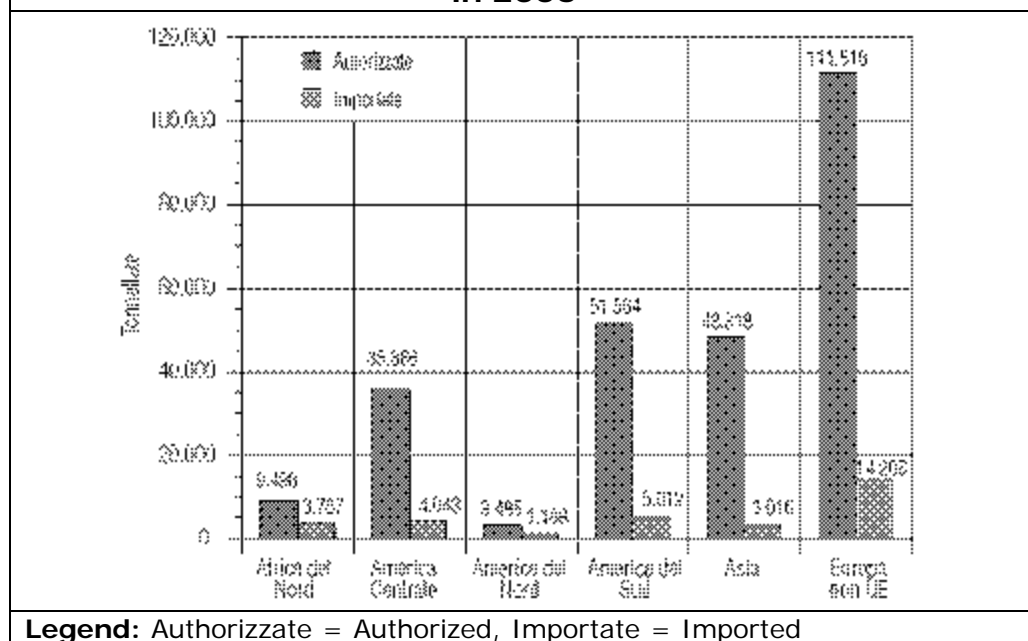
## Italian Market Data

### I. Imports

When considering imports into Italy, it is important to note that only partial information can be obtained because it is difficult to measure products imported to other EU countries that then arrive in Italy through “triangulation,” the free circulation of goods within the EU territory.

To import organic products, Italian importers must obtain an import authorization from the Ministry of Agriculture. In June 2007, there were 228 importers registered with the Italian Ministry of Agriculture. The figure below shows the quantity of organic product authorized for importation by continent in contrast with the quantity actually imported in 2006.

**Fig. 15. Tons of organic product authorized for importation into Italy and tons actually imported per continent of origin in 2006<sup>62</sup>**



Source: MiPAAF- SINAB cited by ISMEA

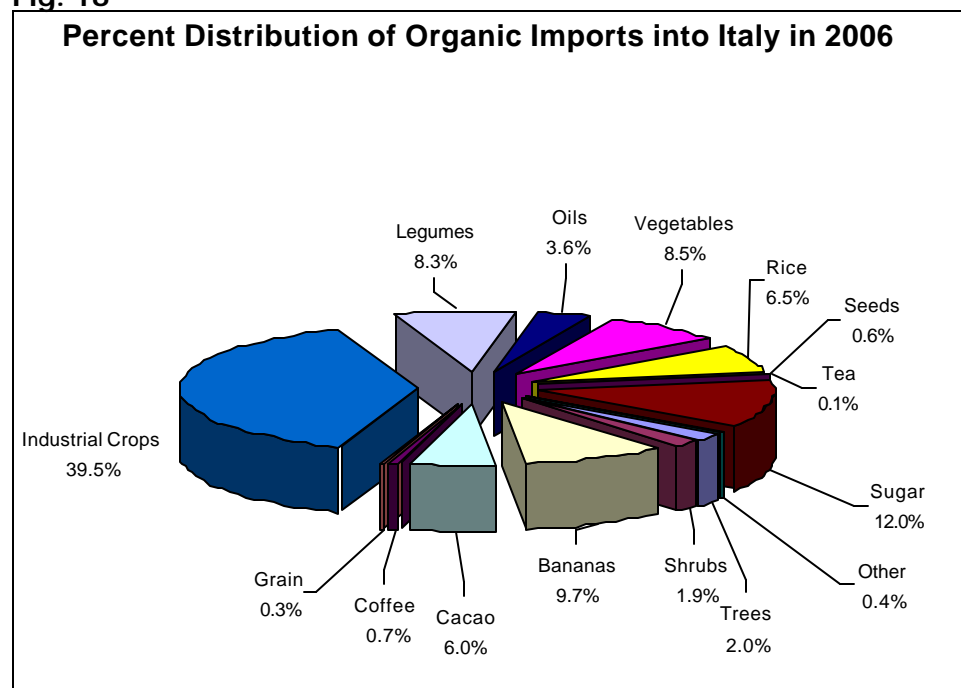
In 2006, Italy directly received about 2,000 tons of organic rice from Asia, 1,800 tons of cacao and 1,300 tons of sugar from Central America, 2,300 tons of bananas and 2,200 tons of sugar from South America.<sup>63</sup> The only products that arrive in Italy consistently and that are often in direct competition with production from the Mediterranean are products from Africa (approx. 2,000 tons of vegetables and 1,000 tons of oil) and from non-EU Europe (approx. 12,000 tons of industrial crops).<sup>64</sup> The organic products that are imported in the greatest quantities are vegetables (43.5% of organic imports) and oil (42.7% of organic imports) from North Africa.<sup>65</sup>

**Table 3. Amount (tons) of organic product imported into Italy, by continent of origin and type of product, in 2006<sup>66</sup>**

	<i>Europe non EU</i>	<i>Asia</i>	<i>North Africa</i>	<i>South America</i>	<i>Central America</i>	<i>North America</i>	<i>Total</i>
<b>Tree Crops</b>	321	29	178	94	-	-	<b>622</b>
<b>Shrubs</b>	598	-	-	-	-	-	<b>598</b>
<b>Bananas</b>	-	-	-	2362	654	-	<b>3016</b>
<b>Cacao</b>	-	-	-	-	1869	-	<b>1869</b>
<b>Coffee</b>	-	-	-	-	179	25	<b>204</b>
<b>Grain</b>	67	20	-	-	-	-	<b>87</b>
<b>Industrial Crops</b>	12214	135	-	-	-	10	<b>12359</b>
<b>Fungi</b>	-	-	-	-	-	-	<b>0</b>
<b>Legumes</b>	986	486	-	-	-	1133	<b>2605</b>
<b>Oils</b>	-	-	948	174	-	-	<b>1122</b>
<b>Vegetables</b>	-	-	2646	-	-	-	<b>2646</b>
<b>Rice</b>	-	2043	-	-	-	-	<b>2043</b>
<b>Seeds</b>	-	157	-	-	-	20	<b>177</b>
<b>Tea</b>	-	27	-	-	-	-	<b>27</b>
<b>Sugar</b>	-	118	15	2268	1340	-	<b>3741</b>
<b>Total</b>	<b>14186</b>	<b>3015</b>	<b>3787</b>	<b>4898</b>	<b>4042</b>	<b>1188</b>	<b>31116</b>

Source: MiPAAF- SINAB cited by ISMEA

**Fig. 16**

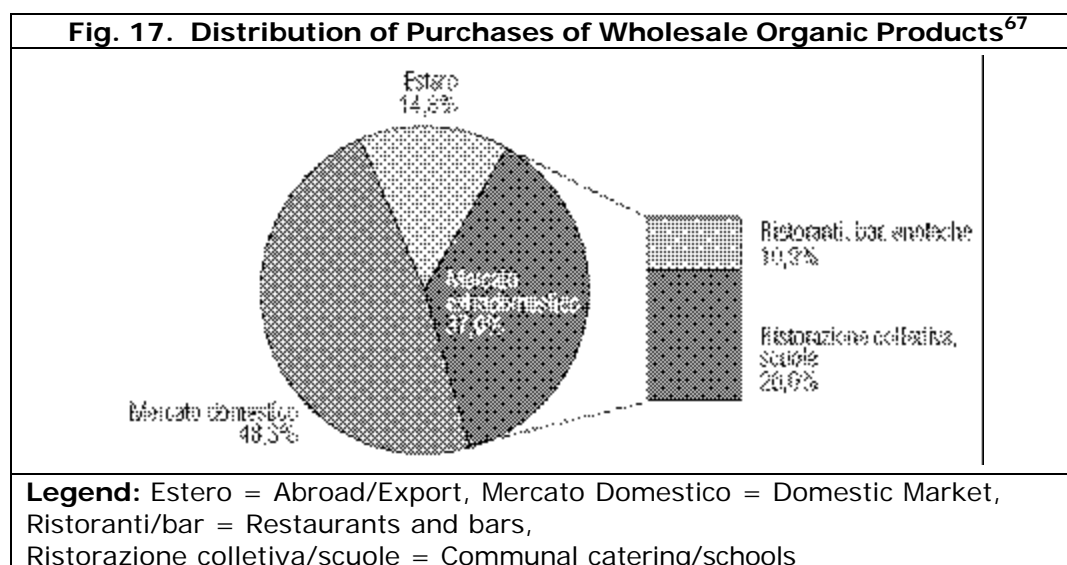


Source: MiPAAF- SINAB cited by ISMEA



## II. Exports

Here is some data on exports of wholesale organic products. In 2005-2006, exports accounted for 14.8% of wholesale organic product sales.



Source: ISMEA Survey on Organic Wholesalers

In light of the 2000 Italian Finance Law, it might be of interest to note that 26% of organic wholesale purchases were made by domestic communal caterers and schools. For more information on this topic see the subsection of this report "Legge 23 Dicembre 1999, n. 488 – Organics in schools and hospitals" under subsection "Italy" under the section "Regulations."

## III. Domestic Consumption

The most recent figures show that Italians spend 25 Euros per capita annually on organic products. This is rather low in comparison to Switzerland (105 Euros), Denmark (51 Euros), Sweden (47 Euros), and Germany (42 Euros).<sup>68</sup> In 2006, Italians spent 312 million Euros on organic products, up 9.2% from 2005 spending.<sup>69</sup>

**Table 4. Italian Domestic Consumption of Organic Products from Jan. – Oct. 2007 (compared to same period in 2006, in euro)<sup>70</sup>**

	2006	2007	Var. %
Milk and milk derivatives	48,103,601	52,329,812	8.8%
Fresh/transformed vegetables	34,343,669	42,651,013	24.2%
Biscotti and snacks	30,800,068	29,598,531	-3.9%
Non-alcoholic drinks	21,524,531	24,544,881	14.0%
Eggs	17,548,422	17,709,748	0.9%
Sugar, coffee, tea	14,983,964	14,097,345	-5.9%
Products for infants	9,773,561	13,931,929	42.5%
Oils	11,806,473	11,918,802	1.0%
Rice and pasta	10,006,044	11,179,874	11.7%
Honey	8,578,392	8,312,741	-3.1%
Bread and substitutes	7,495,715	7,135,805	-4.8%
Gelati (ice-cream) and frozen	5,201,842	6,341,225	21.9%

<b>foods</b>			
<b>Condiments</b>	3,277,809	4,236,965	29.3%
<b>Other organic products</b>	3,884,690	3,824,868	-1.5%
<b>Deli meats</b>	1,804,583	2,535,596	40.5%
<b>Alcoholic drinks</b>	1,710,457	1,970,045	15.2%
<b>Dietary products</b>	2,113,782	1,656,172	-21.6%
<b>Total organic products</b>	<b>232,957,603</b>	<b>253,975,352</b>	<b>9.0%</b>

	<b>2006</b>	<b>2007</b>	<b>Var. %</b>
<b>ITALY TOTAL</b>	<b>232,957,603</b>	<b>253,975,352</b>	<b>9.0%</b>
<b>North West</b>	94,780,002	110,404,284	16.5%
<b>North East</b>	63,611,948	74,031,483	16.4%
<b>Center</b>	53,769,593	48,588,341	-7.9%
<b>South and islands</b>	21,796,023	20,951,280	-3.9%

Source: ISMEA/ACNielsen

#### IV. Price Premium

The price premium for organic products varies considerably by product. Among the products listed, organic condiments has the highest price premium. Organic products for infants have a negative price premium, meaning that they are sold at lower prices than conventional products for infants.

**Table 5. Percent difference in price between organic and conventional products<sup>71</sup>**

	<b>2006</b>	<b>2005</b>	<b>Difference (in percentage points) 06/05</b>
<b>Milk and milk derivatives</b>	40.2%	40.9%	-7.0
<b>Dietary products</b>	16.9%	16.7%	2.0
<b>Products for infants</b>	-15.1%	-12.1%	-3.1
<b>Rice and pasta</b>	33.4%	39.1%	-5.7
<b>Bread and substitutes</b>	98.0%	84.6%	13.5
<b>Fresh/Transformed Vegetables</b>	62.2%	67.8%	-5.6
<b>Biscotti, sweets, snacks</b>	100.3%	85.7%	14.5
<b>Honey</b>	60.3%	57.7%	2.6
<b>Oils</b>	90.6%	93.8%	-3.2
<b>Deli meats</b>	79.8%	67.4%	12.5
<b>Eggs</b>	87.9%	92.4%	-4.5
<b>Condiments</b>	113.8%	98.6%	15.2
<b>Gelati (ice-cream) and frozen foods</b>	29.6%	28.5%	1.1
<b>Sugar, coffee, tea</b>	91.3%	87.6%	3.7
<b>Alcoholic drinks</b>	59.2%	64.5%	-5.3
<b>Non-alcoholic drinks</b>	73.6%	66.8%	6.8
<b>Other organic products</b>	114.0%	124.0%	-10.0
<b>Total organic products</b>	<b>65.9%</b>	<b>64.9%</b>	<b>0.9</b>

## V. Price Elasticity of Demand

Almost all major organic products are elastic, with honey being the most elastic. Fruit drinks without carbonation are proportional. Spoon desserts are the only rigid/inelastic product in Table 6. It might be of interest to point out that Table 5 lists "Biscotti, sweets, snacks" as having a 100.3% price premium over the corresponding conventional products.

**Table 6. Price Elasticity of Demand for the Most Common Organic Products<sup>72</sup>**

	<i>Var. % 06/05 price</i>	<i>Var. % 06/05 quantity</i>	<i>Elasticity</i>	<i>Type of elasticity</i>
<b>Fresh Vegetables</b>	-8.2%	24.6%	3.0	elastic
<b>Jam</b>	10.8%	19.4%	1.8	elastic
<b>Fresh Fruit</b>	0.9%	15.0%	16.7	elastic
<b>Pasta</b>	3.0%	14.0%	4.7	elastic
<b>Olive oil</b>	11.0%	28.8%	2.6	elastic
<b>UHT Milk (pasturized)</b>	-7.2%	28.5%	4.0	elastic
<b>Fresh Milk</b>	-4.5%	42.9%	9.6	elastic
<b>Fresh yogurt</b>	-2.3%	3.9%	1.7	elastic
<b>Brioche</b>	-10.9%	23.4%	2.1	elastic
<b>Cookies</b>	3.2%	-3.8%	1.2	elastic
<b>Spoon Desserts</b>	16.8%	1.3%	0.1	rigid
<b>Prepared Cereals</b>	2.4%	4.5%	1.9	elastic
<b>Fruit drinks without carbonation</b>	7.5%	-7.5%	1.0	proportional
<b>Soy drinks</b>	-0.2%	-1.7%	10.6	elastic
<b>Eggs</b>	0.4%	4.2%	9.6	elastic
<b>Homogenized foods</b>	-2.4%	14.9%	6.3	elastic
<b>Tosted coffee</b>	-6.0%	23.7%	3.9	elastic
<b>Coffee substitutes</b>	-12.5%	25.6%	2.1	elastic
<b>Teas</b>	12.1%	40.5%	3.4	elastic
<b>Honey</b>	-0.8%	11.0%	14.2	elastic

Source: ISMEA/ACNielsen

Note: Price elasticity of demand was calculated with the following formula:

$E_d = \left\{ \frac{\Delta Q/Q}{\Delta P/P} \right\}$ , where  $(\Delta Q/Q)$  is variation in quantity purchased, and  $(\Delta P/P)$  is variation in price.

## VI. Distribution Channels

Organic products are distributed in Italy by three major channels: wholesalers, large supermarket chains, and specialty stores. Table 7 shows the distribution of store surface area of different size supermarkets by geographic area. The general trend seems to be that medium-large supermarkets have the most store surface area in almost all geographic areas.

**Table 7. Percentage of store surface area by geographic area**

	<i>National Average</i>	<i>North West</i>	<i>North East</i>	<i>Center</i>	<i>South and Islands</i>
<b>Hypermarkets</b>	11.9%	17.6%	0.0%	6.7%	22.2%
<b>Medium-Large Supermarkets</b>	43.3%	58.8%	41.2%	40.0%	33.3%
<b>Medium-Small Supermarkets</b>	31.3%	11.8%	47.1%	40.0%	27.8%
<b>Superettes/ Convenience Stores</b>	13.4%	11.8%	11.8%	13.3%	16.7%
<b>Total</b>	100.0%	100.0%	100.0%	100.0%	100.0%

Source: ISMEA Survey on Gdo.

## Certification in Italy

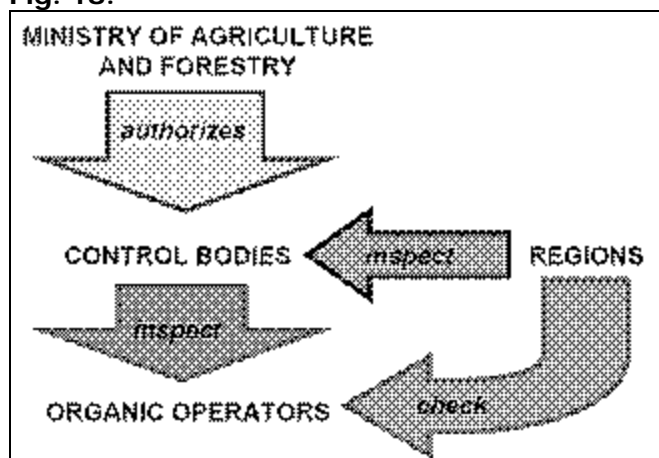
### I. For EU

MiPAAF authorizes inspection/control bodies/certifiers by ministerial decree, on the basis of advice from a national authorization committee (fig. 18. yellow arrow). This committee consists of officials from MiPAAF, officials from other national ministries (Health, Industry, Trade and Foreign Trade), and representatives of the regions. The committee studies the quality manuals of the bodies, their status, and their resources. The committee is obliged to advise MiPAAF, however, its advice is not binding.

The inspection/control bodies/certifiers inspect the organic operators and either grant or deny certification (fig. 18. green arrow). There are 15 approved control bodies in Italy. A list of these certifiers can be found in the "Certifier List" section at the end of this report.

The regional administrations are responsible for inspecting the control bodies and checking organic operators (fig. 18. blue arrows).<sup>73</sup>

**Fig. 18.**



Source: Robert Pinton, FederBio

### II. For Import/Export with the US

Italy and the US do not have an export arrangement and recognition agreement for organic products.<sup>74</sup> A product that is only USDA Organic certified is not considered organic in Italy and likewise a solely EU Organic certified product is not considered organic in the US. An American organic product must be certified EU Organic to be sold in organic sections of Italian supermarkets. 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 EU supermarkets, but will instead be sold next to the conventional products.

#### a. Import Procedures for US Products (from Italy FAIRS Report 2007, p. 15)

To import U.S. organic products, EU importers must work through their designated member state authority to 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. With the implementation of Council Regulation 2092/91 criteria for the licensing of inspection bodies as well as specific criteria regarding management and procedures of certification, conforming to EN 45011 standards were

established. Still lacking, however, is a uniform national framework for inspections and certification, with a force of national inspectors to supervise the regional governments and certifying bodies.<sup>75</sup>

The importer must demonstrate that the product was produced according to standards equivalent to the EU standards. In addition, the importer must provide evidence that the certifier of the product has been accredited to EN 45011/ISO 65 by an authority recognized by the member state. Individual member states may have different criteria for judging compliance with these requirements. 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.<sup>76</sup>

Regulation 2092/91 provided for the possibility for Member States to grant import authorizations on a case-by-case basis until December 31, 2006. Council Regulation 1991/2006 extends this possibility until a new import regime is adopted.<sup>77</sup>

Commission Regulation 1788/2001 lays down detailed rules for a certificate of inspection for imports from third countries. 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 is 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.<sup>78</sup>

## **b. Export Procedures for Italian Products to the US**

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

### **Italian Organizations**

#### **I. Public a. CRA**

The CRA (Consiglio per la Ricerca e Sperimentazione in Agricoltura) is a national research institute which operates under the supervision of the Italian Ministry of Agriculture. It was established by legislative decree n. 454/99 and researches many topics relating to agriculture, including organic agriculture. The CRA advises the Ministry on technical issues relating to organic agriculture.<sup>79</sup> Its website is: <http://sito.entecra.it/>.

#### **b. SINAB**

Within the Italian Ministry of Agriculture, SINAB (Sistema d'Informazione Nazionale sull'Agricoltura Biologica), was developed for the collection and distribution of statistics on the Italian organic sector.<sup>80</sup> 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).

### c. ISMEA, ISTAT, INEA

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).

## II. Private

### a. AIAB and ICEA

AIAB (Associazione Italiana per l'Agricoltura Biologica) is a non-profit organization that advocates for environmentally conscious stewardship of rural areas.<sup>81</sup> With over 14,000 members, AIAB is the largest organic farming association in Italy. In 2000, AIAB co-founded ICEA (Istituto per la Certificazione Etica e Ambientale), an organic certifier/control body for the AIAB quality seal "Garanzia AIAB."<sup>82</sup> ICEA is an accredited organic certifier by the Italian Ministry of Agriculture.<sup>83</sup> AIAB's website is: [www.aiab.it](http://www.aiab.it).

### b. SINCERT

SINCERT (Sistema Nazionale per l'Accreditamento degli Organismi di Certificazione e Ispezione) is a non-profit organization legally recognized by the Italian government. It accredits a large number of organic certifiers in conformance to UNI CEI EN 45011.<sup>84</sup> SINCERT's website is: [www.sincert.it](http://www.sincert.it).

## International Organizations

### I. IFOAM

IFOAM (International Federation of Organic Agriculture Movements) is an international umbrella organization of organic agriculture movements worldwide. 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 Norms, which include the IFOAM Basic Standards for Organic Production and Processing, along with the 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).

### a. IFOAM in Italy

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. Organizations that follow the Italian Organic Standards include AIAB, BAC, BIOS, CCPB, ICEA, and IMC.<sup>85</sup> The "Italian Organizations" and "Certifier Lists" sections of this report provide more information on these organizations.

The 16<sup>th</sup> IFOAM Organic World Congress: "Cultivate the Future" will take place in Modena, Italy on July 16 – 20, 2008. The conference website is: <http://www.modenabio2008.org>.

**EU Organic Logo**

In March 2000 the European Commission introduced an organic logo under Council Regulation 2092/91 to be used on a voluntary basis by producers whose systems and products satisfy EU regulations.<sup>86</sup>

The implementation of a new organic EU logo on 1 January 2009 has been postponed one year to 2010 due to complaints that the new logo too closely resembles the private organic logo of Aldi, a German discount supermarket chain. The European Commission will launch a promotion program during summer 2008 which will include a competition, open to all EU citizens, to design a new logo.<sup>87</sup>

		
current EU (Italian)	new proposed EU	Aldi (German supermarket)



**Certifier Lists****I. List of the 15 accredited certifying agents in Italy that can certify EU Organic<sup>88</sup>**

ABC - Fratelli Bartolomeo s.s. - (Cod. Min. IT - ABC)  
Via Roma, 45  
70025 - Grumo Appula BA  
Phone : +39-080-3839578  
Fax : +39-080-3839578  
abc.italia@libero.it <http://www.abcitalia.org>

ANCCP - Agenzia Nazionale Certificazione Componenti e Prodotti S.r.l. - (Cod. Min. IT - ANC)  
Via Rombon n. 11  
20134 - Milano  
Phone: +39-02-2104071  
Fax: +39-02-210407218  
anccp@anccp.it <http://www.anccp.it/>

Bioagricert S.r.l. - (Cod. Min. IT - BAC)  
Via dei Macabraccia, 8  
40033 - Casalecchio di Reno BO  
Phone: +39-051-562158  
Fax: +39-051-564294  
info@bioagricert.org <http://www.bioagricert.org>

BIOS S.r.l. - (Cod. Min. IT - BSI)  
Via Monte Grappa 37/C  
36063 - Marostica VI  
Phone: +39-0424-471125  
Fax: +39-0424-476947  
info@certbios.it <http://www.certbios.it/>

BIOZOO - S.r.l. - (Cod. Min. IT - BZO)  
Via Chironi 9  
07100 - Sassari SS  
Phone: +39-079-27-65-37  
Fax: +39-079-28-53-527  
info@biozoo.org <http://www.biozoo.org/>

CCPB S.r.l. - (Cod. Min. IT - CPB)  
Via Jacopo Barozzi, 8  
40126 - Bologna BO  
Phone: +39-051-6089811  
Fax: +39-051-254842  
ccpb@ccpb.it <http://www.ccpb.it>

Certiquality S.r.l. - (Cod. Min. IT - CTQ)  
Via Gaetano Giardino, 4  
20123 - Milano  
Phone: +39-02-8069171  
Fax: +39-02-86465295  
certiquality@certiquality.it <http://www.certiquality.it>

CODEX S.r.l. - (Cod. Min. IT - CDX)  
Via Duca degli Abruzzi, 41  
95048 - Scordia CT  
Phone: +39-095-650716  
Fax: +39-095-650356  
codex@codexsrl.it <http://www.codexsrl.it/>

Ecocert Italia S.r.l. - (Cod. Min. IT - ECO)  
Corso delle Provincie 60  
95127 - Catania CT  
Phone: +39-095 442746  
Fax: +39-095-505094  
info@ecocertitalia.it <http://www.ecocertitalia.it>

Ecosystem International Certificazioni S.r.l. - (Cod. Min. IT - ECS)  
Via Monte San Michele 49  
73100 - Lecce LE  
Phone: +39-0832-318433  
Fax: +39-0832-318433  
info@ecosystem-srl.com <http://www.ecosystem-srl.com/>

ICEA - Istituto per la Certificazione Etica e Ambientale - (Cod. Min. IT - ICA)  
Strada Maggiore, 29  
40125 - Bologna BO  
Phone: +39-051-272986  
Fax: +39-051-232011  
icea@icea.info <http://www.icea.info>

IMC - Istituto Mediterraneo di Certificazione S.r.l. - (Cod. Min. IT - IMC)  
Via Carlo Pisacane 32  
60019 - Senigallia AN  
Phone: +39-071-7930179  
Fax: +39-071-7910043  
imcert@imcert.it <http://www.imcert.it>

Q.C. & I. - International Services s.a.s. - (Cod. Min. IT - QCI)  
Villa Parigini - località Basciano  
53035 - Monteriggioni SI  
Phone: +39-0577-327234  
Fax: +39-0577-329907  
lettera@qci.it <http://www.qci.it>

Sidel S.p.a - (Cod. Min. IT - SDL)  
Via Larga, 34/2  
40138 - BOLOGNA BO  
Phone: +39-0516026611  
Fax: +39-0516012227  
sidel@sidelitalia.it <http://www.sidelitalia.it>

Suolo e Salute srl - (Cod. Min. IT - ASS)  
Via Paolo Borsellino, 12/B  
61032 - Fano PU  
Phone: +39-0721-860543

Fax: +39-0721-860543  
info@suoloesalute.it <http://www.suoloesalute.it>

## II. List of the 6 accredited certifying agents in Italy that can certify for the USDA National Organic Program<sup>89</sup>

### 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

---

<sup>1</sup> “Il mercato dei prodotti biologici: tendenze generali e nelle principali filiere” p. 12, Studi Agricoltura Biologica, ISMEA, December 2007.

<sup>2</sup> *Ibid.*

<sup>3</sup> *Ibid.*

<sup>4</sup> *Ibid.*

<sup>5</sup> *Ibid.*, at p. 10.

<sup>6</sup> *Ibid.*

<sup>7</sup> IAMB-ISMEA, “Il biologico nel bacino del mediterraneo: Politiche, normative e mercati per un’agricoltura di qualità” March 2008, p. 69.

<sup>8</sup> “Il mercato dei prodotti biologici: tendenze generali e nelle principali filiere” p. 11, Studi Agricoltura Biologica, ISMEA, December 2007.

<sup>9</sup> *Ibid.* Australia is first (little less than 12 million hectares), followed by Argentina (3.1 million), China, (2.3 million), the US (1.6 million), and Italy (1.07 million).

<sup>10</sup> “Il mercato dei prodotti biologici: tendenze generali e nelle principali filiere” p. 11, Studi Agricoltura Biologica, ISMEA, December 2007. Lichtenstein is first (27%), followed by Austria (145), Switzerland (11.5%), and Italy (8.4%).

<sup>11</sup> “Organic Foods” <<http://useu.usmission.gov/agri/organic.html>>

<sup>12</sup> “Organic farming: Guide to community rules” European Commission Directorate-General for Agriculture, p. 6, 2000. Accessed 2 April 2008.  
<[http://ec.europa.eu/agriculture/qual/organic/brochure/abio\\_en.pdf](http://ec.europa.eu/agriculture/qual/organic/brochure/abio_en.pdf)>

<sup>13</sup> Niggli, Urs. “Organic Farming in Switzerland” Stiftung Ökologie & Landbau (SÖL), Bad Dürkheim, Germany, 2000, p. 297. <[http://www.organic-europe.net/country\\_reports/pdf/2000/switzerland.pdf](http://www.organic-europe.net/country_reports/pdf/2000/switzerland.pdf)>

<sup>14</sup> “Organic farming: Guide to community rules” European Commission Directorate-General for Agriculture, p. 6, 2000. Accessed 2 April 2008.

<sup>15</sup> Defrancesco, Edi and Luca Rossetto. “From Niche to Market: The Growth of Organic Business in Italy” p. 4. From: Canavari, Maurizio and Kent D. Olson. Ed. Organic Food: Consumers’ Choices and Farmers’ Opportunities. 2007 Springer Science+Business Media.

<sup>16</sup> “Organic farming: Guide to community rules” European Commission Directorate-General for Agriculture, p. 5, 2000. Accessed April 2, 2008.  
<[http://ec.europa.eu/agriculture/qual/organic/brochure/abio\\_en.pdf](http://ec.europa.eu/agriculture/qual/organic/brochure/abio_en.pdf)>

<sup>17</sup> *Ibid.*

<sup>18</sup> “Organic Foods” <<http://useu.usmission.gov/agri/organic.html>>

- <sup>19</sup> IAMB-ISMEA, “Il biologico nel bacino del mediterraneo: Politiche, normative e mercati per un’agricoltura di qualità” March 2008, p. 69.
- <sup>20</sup> European Union online. “Agriculture and Rural Development: The role of legislation” Accessed April 1, 2008. <[http://ec.europa.eu/agriculture/qual/organic/reg/index\\_en.htm](http://ec.europa.eu/agriculture/qual/organic/reg/index_en.htm)>
- <sup>21</sup> *Ibid.*, at p. 8.
- <sup>22</sup> USDA Foreign Agricultural Service GAIN Report No. IT5026.
- <sup>23</sup> “OGM: De Castro, tolleranza zero nel biologico” Il Portale del Governo Italiano Online 27 February 2007. Accessed 1 April 2008. <[http://www.governo.it/notizie/not\\_notizia.asp?idno=2875](http://www.governo.it/notizie/not_notizia.asp?idno=2875)>
- <sup>24</sup> Agricoltura Italiana Online, *Ogm, Tolleranza Zero per il Biologico*, [http://www.agricolturaitalianaonline.gov.it/contenuti/agricoltura/tecnologie/ogm/ogm\\_tolleranza\\_zero\\_per\\_il\\_biologico](http://www.agricolturaitalianaonline.gov.it/contenuti/agricoltura/tecnologie/ogm/ogm_tolleranza_zero_per_il_biologico) (last visited Feb. 13, 2007). To stop the regulation from moving to parliament, Italy needs a “minority block” of at least 90 votes. It only had 75 votes supporting zero-tolerance.
- <sup>25</sup> Halliday, Jess. “Ministers vote favourably on new EU organic regulation” FoodNavigator.com, 13 June 2007. Accessed 1 April 2008. <<http://www.foodnavigator.com/news/printNewsBis.asp?id=77339>>
- <sup>26</sup> Italy FAIRS Report 2007, G. Organic Foods, p. 15 <<http://www.fas.usda.gov/gainfiles/200708/146292166.pdf>>
- <sup>27</sup> European Union online. “GM Food and Feed” Accessed April 1, 2008. <<http://europa.eu/scadplus/leg/en/lvb/121154.htm#THRESHOLD>>
- <sup>28</sup> *Ibid.*
- <sup>29</sup> UK Food Standards Agency “Guidance note for sampling food and feed to determine the presence of genetically modified (GM) material,” Annex A, December 2007 update. <<http://www.foodstandards.gov.uk/multimedia/pdfs/lagmguide.pdf>>
- <sup>30</sup> Introduction, p. 5. <[http://ec.europa.eu/agriculture/qual/organic/brochure/abio\\_en.pdf](http://ec.europa.eu/agriculture/qual/organic/brochure/abio_en.pdf)>
- <sup>31</sup> *Ibid.*
- <sup>32</sup> *Ibid.*
- <sup>33</sup> Dimitri, Carolyn and Lydia Oberholtzer. “EU and US Organic Markets Face Strong Demand Under Different Policies” Amber Waves online. <<http://www.ers.usda.gov/AmberWaves/February06/Features/feature1.htm>>
- <sup>34</sup> FAO Corporate Document Repository online. “World Markets for Organic Fruits and Vegetables: Italy” <<http://www.fao.org/docrep/004/Y1669E/y1669e0a.htm>>
- <sup>35</sup> Dimitri, Carolyn and Lydia Oberholtzer. “EU and US Organic Markets Face Strong Demand Under Different Policies” Amber Waves online. <<http://www.ers.usda.gov/AmberWaves/February06/Features/feature1.htm>>
- <sup>36</sup> Defrancesco, Edi and Luca Rossetto. “From Niche to Market: The Growth of Organic Business in Italy” p. 4. From: Canavari, Maurizio and Kent D. Olson. Ed. Organic Food: Consumers’ Choices and Farmers’ Opportunities. 2007 Springer Science+Business Media.
- <sup>37</sup> “Il mercato dei prodotti biologici: tendenze generali e nelle principali filiere” p. 31, Studi Agricoltura Biologica, ISMEA, December 2007.
- <sup>38</sup> *Ibid.*, at p. 32
- <sup>39</sup> IAMB-ISMEA, “Il biologico nel bacino del mediterraneo: Politiche, normative e mercati per un’agricoltura di qualità” March 2008, p. 71.
- <sup>40</sup> SINCERT website. “EA Guidelines on the Application of EN 45 001” Accessed April 21, 2008. <<http://www.sincert.it/documenti/docs/EA-6-01rev00.pdf>>
- <sup>41</sup> IAMB-ISMEA, “Il biologico nel bacino del mediterraneo: Politiche, normative e mercati per un’agricoltura di qualità” March 2008, p. 69.
- <sup>42</sup> *Ibid.*, at p. 70.
- <sup>43</sup> Parlamento Italiano online. “Legge 23 Dicembre 1999, n. 448 : Disposizioni per la formazione del bilancio annuale” Art. 59 (Sviluppo dell’agricoltura biologica e di qualità) <<http://www.camera.it/parlam/leggi/994881.htm>>
- <sup>44</sup> Defrancesco, Edi and Luca Rossetto. “From Niche to Market: The Growth of Organic Business in Italy” p. 5. From: Canavari, Maurizio and Kent D. Olson. Ed. Organic Food: Consumers’ Choices and Farmers’ Opportunities. 2007 Springer Science+Business Media.
- <sup>45</sup> *Ibid.*, at p. 6.
- <sup>46</sup> *Ibid.*, at p. 5.
- <sup>47</sup> *Ibid.*

- <sup>48</sup> *Ibid.*
- <sup>49</sup> *Ibid.*
- <sup>50</sup> SINAB website. Decreto ministeriale del 27/12/2007 “Finanziamento progetti di ricerca nel settore dell’agricoltura biologica”  
<[http://www.sinab.it/sezioni/circolare/allegati\\_circolare/129/20071227\\_BandoC\\_RS\\_sportellobio\[1\].pdf](http://www.sinab.it/sezioni/circolare/allegati_circolare/129/20071227_BandoC_RS_sportellobio[1].pdf)>
- <sup>51</sup> Pinton, Robert and Raffaele Zanoli. “Organic Farming in Italy 2007” Organic-europe online.  
<[http://www.organic-europe.net/country\\_reports/italy/default.asp](http://www.organic-europe.net/country_reports/italy/default.asp)>
- <sup>52</sup> AIAB website. “AIAB System: The Story” <[http://www.aiab.it/associazione/system\\_aiab.shtml](http://www.aiab.it/associazione/system_aiab.shtml)>
- <sup>53</sup> *Ibid.*
- <sup>54</sup> Pinton, Robert and Raffaele Zanoli. “Organic Farming in Italy 2007” Organic-europe online.  
<[http://www.organic-europe.net/country\\_reports/italy/default.asp](http://www.organic-europe.net/country_reports/italy/default.asp)>
- <sup>55</sup> *Ibid.*
- <sup>56</sup> IAMB-ISMEA, “Il biologico nel bacino del mediterraneo: Politiche, normative e mercati per un’agricoltura di qualità” March 2008, p. 74.
- <sup>57</sup> *Ibid.*, at p. 75.
- <sup>58</sup> *Ibid.*, at p. 73.
- <sup>59</sup> *Ibid.*
- <sup>60</sup> *Ibid.*
- <sup>61</sup> *Ibid.*
- <sup>62</sup> “Il mercato dei prodotti biologici: tendenze generali e nelle principali filiere” Studi Agricoltura Biologica, ISMEA, December 2007, p. 41.
- <sup>63</sup> IAMB-ISMEA, “Il biologico nel bacino del mediterraneo: Politiche, normative e mercati per un’agricoltura di qualità” March 2008, p. 76.
- <sup>64</sup> *Ibid.*
- <sup>65</sup> “Il mercato dei prodotti biologici: tendenze generali e nelle principali filiere” Studi Agricoltura Biologica, ISMEA, December 2007, p. 41.
- <sup>66</sup> *Ibid.*
- <sup>67</sup> *Ibid.*, at p. 46.
- <sup>68</sup> *Ibid.*, at p. 15.
- <sup>69</sup> *Ibid.*, at p. 59.
- <sup>70</sup> IAMB-ISMEA, “Il biologico nel bacino del mediterraneo: Politiche, normative e mercati per un’agricoltura di qualità” March 2008, p. 77.
- <sup>71</sup> “Il mercato dei prodotti biologici: tendenze generali e nelle principali filiere” Studi Agricoltura Biologica, ISMEA, December 2007, p. 80.
- <sup>72</sup> *Ibid.*, at p. 71.
- <sup>73</sup> IAMB-ISMEA, “Il biologico nel bacino del mediterraneo: Politiche, normative e mercati per un’agricoltura di qualità” March 2008, p. 69.
- <sup>74</sup> USDA website. “National Organic Program: Export Arrangements and Recognition Agreements.”  
<<http://www.ams.usda.gov/AMSV1.0/ams.fetchTemplateData.do?template=TemplateE&navID=NationalOrganicProgram&leftNav=NationalOrganicProgram&page=NOPExportArrangementsandRecognitionAgreements&description=Export%20Arrangements%20and%20Recognition%20Agreements&acct=nopgeninfo>>
- <sup>75</sup> Italy FAIRS Report 2007, G. Organic Foods, p. 15  
<<http://www.fas.usda.gov/gainfiles/200708/146292166.pdf>>
- <sup>76</sup> *Ibid.*
- <sup>77</sup> *Ibid.*
- <sup>78</sup> *Ibid.*
- <sup>79</sup> IAMB-ISMEA, “Il biologico nel bacino del mediterraneo: Politiche, normative e mercati per un’agricoltura di qualità” March 2008, p. 69.
- <sup>80</sup> *Ibid.*
- <sup>81</sup> AIAB website. <[http://www.aiab.it/home/primi\\_passi/conosci\\_aiab/presentazione\\_1](http://www.aiab.it/home/primi_passi/conosci_aiab/presentazione_1)>
- <sup>82</sup> *Ibid.*
- <sup>83</sup> *Ibid.*
- <sup>84</sup> IAMB-ISMEA, “Il biologico nel bacino del mediterraneo: Politiche, normative e mercati per un’agricoltura di qualità” March 2008, p. 69.
- <sup>85</sup> IFOAM website. <[http://www.ifoam.org/press/press/Italian\\_Organic\\_Standard.html](http://www.ifoam.org/press/press/Italian_Organic_Standard.html)>

---

<sup>86</sup> European Union online. “Agriculture and Rural Development: The organic logo” Accessed 1 April, 2008. <[http://ec.europa.eu/agriculture/qual/organic/logo/index\\_en.htm](http://ec.europa.eu/agriculture/qual/organic/logo/index_en.htm)>

<sup>87</sup> Kreuzer, Kai. “New organic EU logo postponed” Organic-Market.Info online. Accessed 31 March 2008. <[http://www.organic-market.info/bio-markt/en\\_CMS/TM\\_EN\\_Meldungen/412/de\\_content\\_einzelprint.html](http://www.organic-market.info/bio-markt/en_CMS/TM_EN_Meldungen/412/de_content_einzelprint.html)>

<sup>88</sup> SINAB website. <<http://www.sinab.it/programmi/regione.php?tp=odc>>

<sup>89</sup> USDA website. National Organic Program. “Foreign Accredited Certifying Agents: Italy” <<http://www.ams.usda.gov/AMSV1.0/ams.fetchTemplateData.do?template=TemplateJ&navID=NationalOrganicProgram&leftNav=NationalOrganicProgram&page=NOPACAs&description=USDA%20Accredited%20Certifying%20Agents&acct=nopgeninfo>>