ORGANIC TARGETS 4EU

ITALY
ORGANIC SECTOR FACTSHEET
PRODUCTION/MARKET TRENDS & POLICIES

KEY INDICATORS

With 2,349,880 hectares, Italy had the third-largest organic farmland area in the European Union, after France and Spain. 17.9% of the farmland was organic, considerably more than in the EU (10.6%). Organic farmland only just about doubled in the 2001 to 2022 period, thus at a slower rate than in most other EU countries. In Italy, organic retail sales amounted to 3,660 million euros (rank 3 in the European Union) or 3.6% of all retail sales, slightly below the EU organic share.

ORGANIC FARMLAND	2001	2022
Area* (Share of Total Farmland)	1,237,640 ha (9.5%)	2,349,880 ha (17.9%)
Area Growth from 2001 to 2022	90%	

ORGANIC LAND USE & AQUACULTURE	2001	2022
Arable Land* (Share of Total)	749,999 ha (13.3%)	1,128,912 ha (16.3%)
Permanent Crops* (Share of Total)	225,660 ha (8.4%)	558,716 ha (22.8%)
Grassland* (Share of Total)	241,157 ha (5.5%)	662,252 ha (17.7%)
Aquaculture Production (Share of Total)	N/D	23,690 MT (19.3%) (2021)

ORGANIC OPERATORS	2001	2022
Producers (Share of Total)	56,199 (2.6%)	82,593 (7.3%)
Aquaculture Producers	N/D	70 (2021)
Processors	4,231	23,602
Importers	115	582

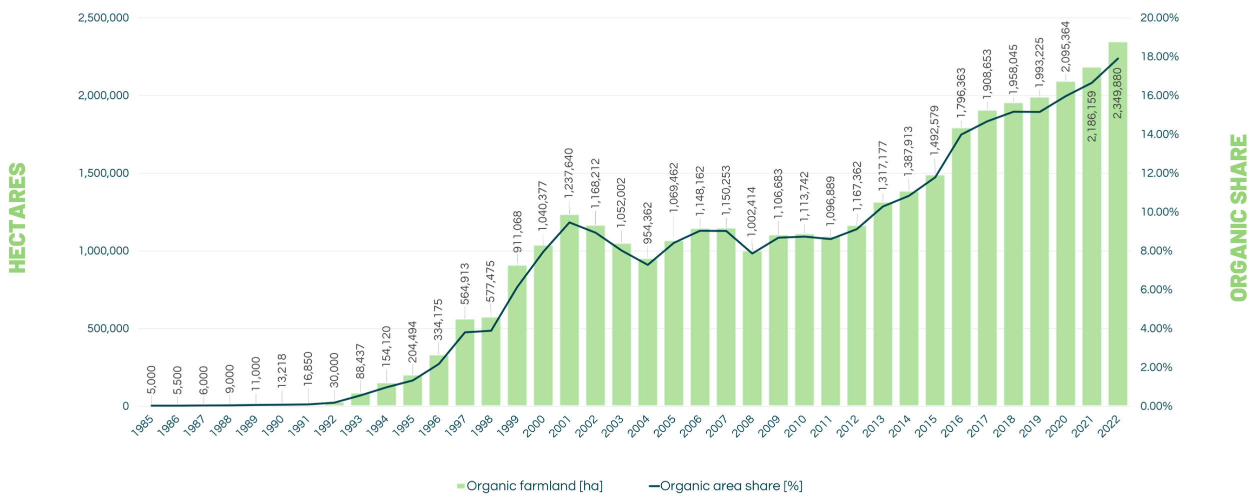
ORGANIC RETAIL SALES	2001	2022
Retail Sales (Share of Total)	1,050 M €	3,660 M€ (3.6%)
Per Capita Consumption	18.4 €	62.2 €
Retail Sales Growth from 2001 to 2022	249 %	
Imports	N/D	177,762 MT

Source: FiBL survey based on national data sources, Eurostat and TRACES/European Commission in the framework of the OrganicTargets4EU project

**In conversion and fully organic*

KEY INDICATORS

DEVELOPMENT OF ORGANIC FARMLAND IN ITALY



Source: FiBL-AMI Survey based on SINAB, Eurostat, Nic Lampkin

DEVELOPMENT OF ORGANIC RETAIL SALES IN ITALY

Source: FiBL-AMI Survey based on Assobio, Nomisma, SINAB

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CAP ORGANIC POLICY SUPPORT

The Italy CAP strategic plan provides for a close to 40% increase in supported organic area and expenditure by 2027 compared with 2018. Planned payments vary by regopm and by specific crop and livestock categories, and are similar to, or slightly higher, in 2023-27 than in the previous period. Conversion payments are typically 10-20% higher than maintenance payments in most regions in both periods. Expenditure per hectare is estimated to be similar to the previous period, with total expenditure over five years likely to exceed €2 billion.

CONVERSION & MAINTENANCE	2018	2027
Land Area Supported (Change from 2018)*	1,098 kha	1489 kha (+36%)
Share of Total Agricultural Area Supported*	8.5%	11.9% (+40%)
Share of Certified Organic Area Supported (Change)*	56%	N/D
Expenditure per Year*	386 M€	522[1] M€ (+35%)
Expenditure per Hectare Supported*	352 €	350[1] € (0%)

[1]No organic expenditure data in CAP SP. Expenditure estimated at 350€/ha based on 5 year expenditure of 2,000M€ divided by 5.6Mha supported in 2023-2027

SHARE OF CAP RESOURCES	CAP EXP. 2023-2027	ORGANIC SHARE*
Organic Farming Support (P2)*	2,000[2] M€	100%
Eco-Schemes (P1)	4,402 M€	22.3%
Agri-Environment, Climate, Welfare (P2)	4,571 M€	
Total CAP Expenditure	36,327 M€	5.5%

[2]No organic expenditure data in CAP SP. This value is taken from the published CSP summary

**including in-conversion and fully organic land*

CAP ORGANIC CONVERSION AND MAINTENANCE PAYMENTS FOR DIFFERENT LAND USES

INDICATOR	YEAR	FUND	GRASSLAND	ARABLE CROPS	HORTICULTURE	FRUIT CROPS	GRAPES	OLIVES
Conversion Support (€/ha)	2019	P2	20-600	100-706	180-1,200	113-1,200	506-1,200	390-900
	2023	P2	13-364	53-750	192-1,000	113-1,200	470-1,190	310-900
Change from 2019 to 2023			+40%	+10%	+15%	0%	0%	0%
Maintenance Support (€/ha)	2019	P2	12-450	90-600	270-1,200	102-900	450-900	330-810
	2023	P2	15-450	53-600	173-1,000	220-1,068	540-1,190	310-810
Change from 2019 to 2023			0%	0%	0%	+20%	+25%	0%
Conversion Support Higher than Maintenance	2019	P2	0-20%	0-20%	0-20%	0-33%	0-33%	0-20%
	2023	P2	0-20%	0-20%	0-20%	0-20%	0-20%	0-20%

Range of values reflects regional, crop and livestock differences. Conversion payments higher than maintenance in most regions, typically 10 or 20%, but some regions have no differential.

P1 (Pillar 1) European Agricultural Guarantee Fund (EAGF); P2 (Pillar 2) European Agricultural Fund for Rural Development (EAFRD) and national co-financing

Sources for pages 3 and 4

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NATIONAL ORGANIC ACTION PLAN

Italy has implemented four organic action plans since 2005. The most recent ones include a focus on the development of Bio-districts including the implementation of group certification especially within these districts. There is also a focus on the development of an Italian organic logo to promote Italian organic products, as well as information initiatives including research, advice, training and market data/statistics.

TARGETS

	PERIOD	LAND AREA TARGET	OTHER TARGETS
Previous Action Plan	2016-20	50% more (=16%) UAA by 2020	30% more (=4.5%) retail sales by 2020
Current Action Plan	2023-25	25% of UAA by 2027	N/D

KEY ACTIONS

	PREVIOUS ACTION PLAN (2016 - 2020)	**CURRENT ACTION PLAN** (2023 - 2025)
PRODUCTION	Regionally consistent support payments; explore potential for system approaches	Support for conversion, including new entrants in mountain areas; use of complementary eco-schemes
MARKETS	Priority for organic investment projects; RDP support for organisations and supply chain development including input availability; support for Bio-districts; support for organic procurement and hospitality catering, with review of regulatory constraints and working group to find solutions; promotion of organic products Made in Italy; evaluate options for IT organic logo; multiple actions to strengthen and develop control systems	Increased grant aid % for fruit sector; RDP support for producer groups, Bio-districts; information on best practice for supply chains; inclusion of organic in procurement and hospitality catering; regional financial support for school canteens; introduction of IT organic logo including preparatory studies; implementation of group certification especially in Bio-districts; improvements in control systems
INFORMATION	Increase consumer awareness of benefits of organic; use of SINAB website as information portal; RDP support for advisory services; working group to co-ordinate technical information; support for training modules, university courses, PhD studentships, research staff training; roundtable on research priorities; national research plan; permanent research co-ordination committee; digitalisation of organic sector data; improved interaction with regional and international databases	Promote increased consumption, reversing recent decreases; national organic event, competitions and information system; support for advisory services with more focus on organic livestock and aquaculture; internet platform for advice and education; roundtable for professional development training; multi-annual training plans to develop competence among advisers, trainers, inspectors and officials; research on production, processing, marketing and sustainability, including financial and agronomic aspects; improvement of statistical data for market transparency; address enhanced data requirement under SAIO Regulation; production of regular reports on sector development

AQUACULTURE

The organic share of total aquaculture production in Italy is almost 8%, the second highest share in the EU. Organic aquaculture has been supported as part of the EMFF (2014-2020) and EMFAF (2021-2027) operational programmes and the Multi-annual National Strategic Plan for Aquaculture, including conversion and market support, with the aim of increasing the number of operators engaged in organic aquaculture by a further 5% compared to the 2014-2020 period. The national OAP includes organic aquaculture as a focus for advisory activities. As the funding is project specific and there is no ring-fenced organic budget, statistics on organic aquaculture support expenditure are not available.

OrganicTargets4EU
www.organictargets.eu

Project Coordinator
Ambra De Simone
IFOAM Organics Europe
www.organicseurope.bio

Authors
Helga Willer
(FiBL, Switzerland)

Nicolas Lampkin
(Thünen-Institut, Germany)

Sabine Reinecke
(FiBL, Switzerland)

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