DISCUSSION GROUP A

FOOD, SUPERMARKETS, CONSUMERS

Organic farming in the Mediterranean countries

Working with consumers

PAN Annual Network Conference, Krakow, 7-9 November 2005

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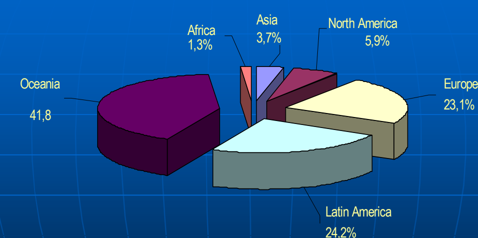
- EC defines organic farming as "*one of the most important instrument to obtain quality products that are environmentally compatible*" (Source: Organic Farming European Action Plan, 2004)

The international context

- 26 million hectares in the world
- Leading Countries: Australia (11,3 million ha.) Argentina (2,8 million ha.) Italy (1 million ha.)

Subdivivision of organic surfaces by geographic areas



Source: SOEL Survey, febbraio 2004

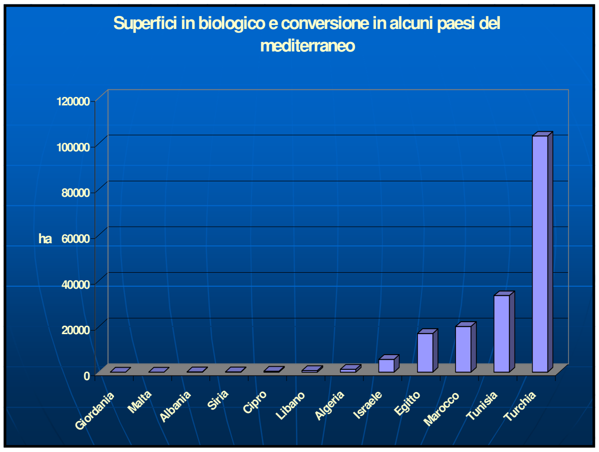
The international context

- The World Market of organic food has grown up to more than 25 billion dollars (Source: ITC Geneve; SŐL Bad Dürkheim 2004)
- From the consumption point of view, the largest markets are Europe and United States, followed by Japan

Number of farms and surfaces (organic and in conversion) in Mediterranean Countries

	Aziende	Ettari (bio + conv)	Estensione media aziendale
Albania	60	192,3	3,21
Algeria	n.a.	1400	
Cipro	150	500	3,33
Egitto	500	17000	34,00
Giordania	4	7,25	1,81
Israele	400	5640	14,10
Libano	164	758	4,62
Malta	20	14,45	0,72
Marocco	12051	20040	1,66
Siria	2	260	130,00
Tunisia	580	33500	57,76
Turchia	13044	103190	7,91

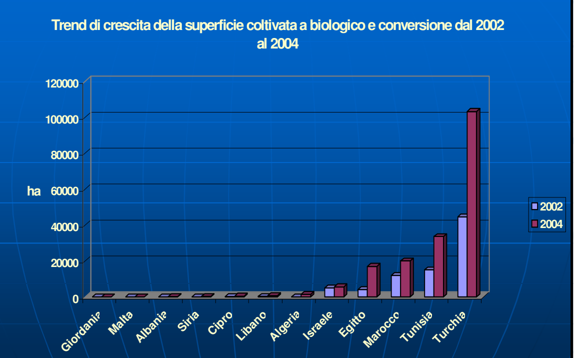
fonte: IAMB - MOAN



Growing trends of organic and in conversion surfaces from 2002 to 2004

	2002	2004	Variazione %
Albania	4	192,3	-
Algeria	-	1400	-
Cipro	166	500	201%
Egitto	4167	17000	308%
Israele	5000	5640	13%
Libano	300	758	153%
Giordania	-	7,25	-
Malta	-	14,45	-
Marocco	11956	20040	68%
Siria	-	260	-
Tunisia	15035	33500	123%
Turchia	44532	103190	132%
TOTALE	**81160**	**182502**	125%

fonte: IAMB - MOAN



Main organic products imported in Italy, Countries of origin and potential quantitatives authorized by MIPAF

Classe di prodotto	Quantità autorizzata nel 2004 (t)	Differenza % rispetto anno 2003	Principali prodotti	Principali paesi di origine
Cereali	31541	-45,6	Riso (13420 t), Frumento tenero (3452 t)	Kazakhistan, Romania, Canada
Frutta fresca	43814	141,3	Banane (37911 t), arance, lamponi, mele, mirtilli, uva	Repubblica Dominicana, Equador, Perù, Egitto, Bulgaria
Frutta trasformata	18045		Piccoli frutti congelati, frutta secca, polpa e purea	Turchia, Bulgaria, Ucraina
Frutta in guscio	2495	367,2	Noci, nocciole, pistacchi e mandorle	Ucraina, Cina, Egitto
Legumi	17674	159,5	Fagioli, ceci e lenticchie	Romania, Cina, Turchia
Ortaggi	30095	-19,5	Patate, funghi e cipolle	Bulgaria, Egitto, Romania
Ortaggi trasformati	2193		Ortaggi disidratati, funghio congelati, pomodoro in polpa e purea	Turchia, Ucraina
Colture industriali	33012		Soia, colza, girasole	Romania, Brasile, Cina
Oli vegetali	13595	11,7	di palma, di oliva	Colombia, Tailandia, Tunisia
Cacao	5290	47,7		Repubblica Dominicana
Caffè	893	-52,8		Messico, Guatemala
Spezie ed aromi	2951	85,7		Egitto, Cina, Ucraina
Tè	391	26,5		Sri Lanka, India
Zucchero	59046	-3,6	di canna (58246 t)	Cuba, Paraguay, Equador

da: L'evoluzione del mercato delle produzioni biologiche (2005) - ISMEA

Main products imported in EU and originating Countries

Prodotti esportati	***Paesi esportatori***
Ortaggi	Israele, Marocco, Tunisia, Egitto
Patate	Israele, Marocco, Algeria
Agrumi	Marocco
Frutta fresca	Israele e paesi nord africani
Frutta secca	Egitto, Marocco, Tunisia, Turchia
Olio di oliva	Tunisia
Piante aromatiche	Marocco, Tunisia, Egitto
Miele	Algeria, Tunisia
Cotone	Egitto
Prodotti trasformati	Turchia

fonte: IAMB - MOAN

Conclusions of Euro-Mediterranean Ministerial Conference on Agricolture (Venice, 27 November 2003)

- Organization of thematic seminars
- Creation of an experts network
- Promotion of Third-Countries participation to Fairs
- Implementation of measures to be financed in the context of the Euro-Med Market regional programme

The Italian context
(2004 vs 2003)

- Production farms (-17%) and processing plants (-3%) are decreasing, but import societies increase (+13%)
- Consumption in supermarkets decreases (-4%) (from 294 to 281 million euros) but as a whole (considering specialized shops and direct selling) they remain stable (-0.3%) (-1.1% the decrease of general food consumption)
- Farmers appear to follow the dynamics of EU contributions (e.g.: agro-environmental measures)

AIAB PROMOTION AND COMMUNICATON STRATEGY

- QUALITY BRANDS (Garanzia Aiab; Bio-cosmesis; Bio-textiles; Bio-detergents; Bio-agritourisms)
- EDITORIAL ACTIVITIES (BioAgricultura; Bio@agricoltura; www.aiab.it)
- CAMPAIGNS (BioDomenica; PrimaveraBio; GODO; GMOs)
- SPECIAL PRIZES (Biol; "Il maiale si fa bio"; Bio Divino; Bio Caseus)
- FAIRS (7 in Italy; abroad: BioFach, Food Expo Tokio; Natural Products Expo West; Biomarchè; Miami wine; FHC Shangaj; Dubai)

Elaboration of a programme to promote quality products (EC Reg 2879/00) financed by EU and Italy in 2003

It foresees a campaign to make consumers aware of organic and typical products

- Basic information to consumers and producers
- Participation to fairs
- "Bio Towns"
- New marketing model based on the "short chain"
- Promotion in the supermarkets and specialised shops
- Serving of organic food in schools

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- Bio shops "Garanzia Aiab"
- "Fa' la cosa giusta!" ("Do the right thing!) with "Natura Sì" supermarket chain

GRAZIE,
THANKS!

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