

Regional Status quo of the Organic Sector

Puglia (Italy)

Patrizia Pugliese and Gianluigi Cardone
CIHEAM-IAMB

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Regional context

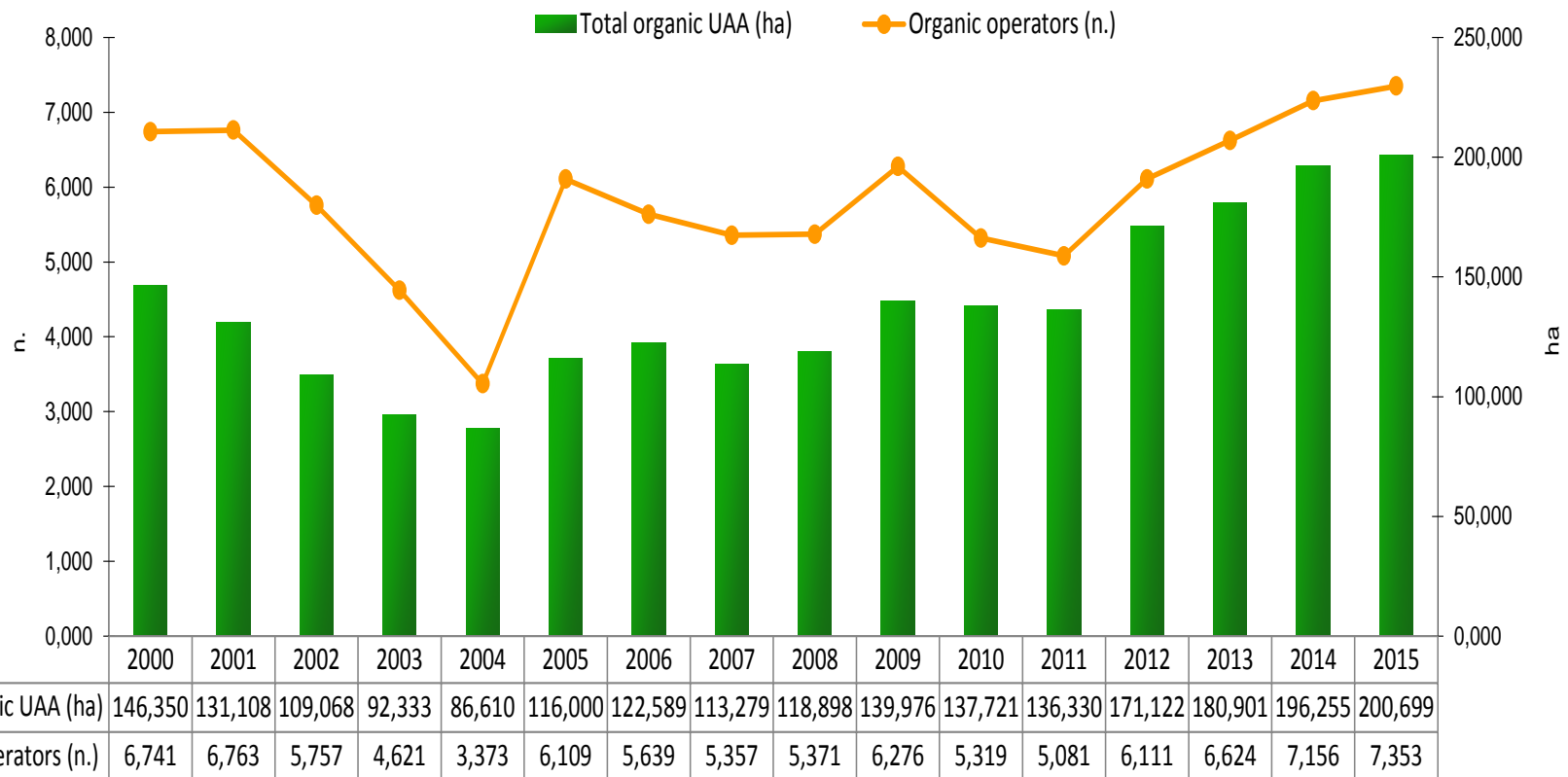
Puglia



- GDP: 69 billion euros (4.3% of national GDP), 2014
- Agro-food sector: >5% of regional added value, 2013
- UAA: 1.4 million ha
- R&D&I: increasing
- Organic operators and land area, Puglia/Italy (%), 2014
 - Operators 11.9%
 - Land area: 12.8%
 - Main crops: olives (24.5%), cereals (21.9%), vineyard (14.2%)

Current situation of the Organic Sector

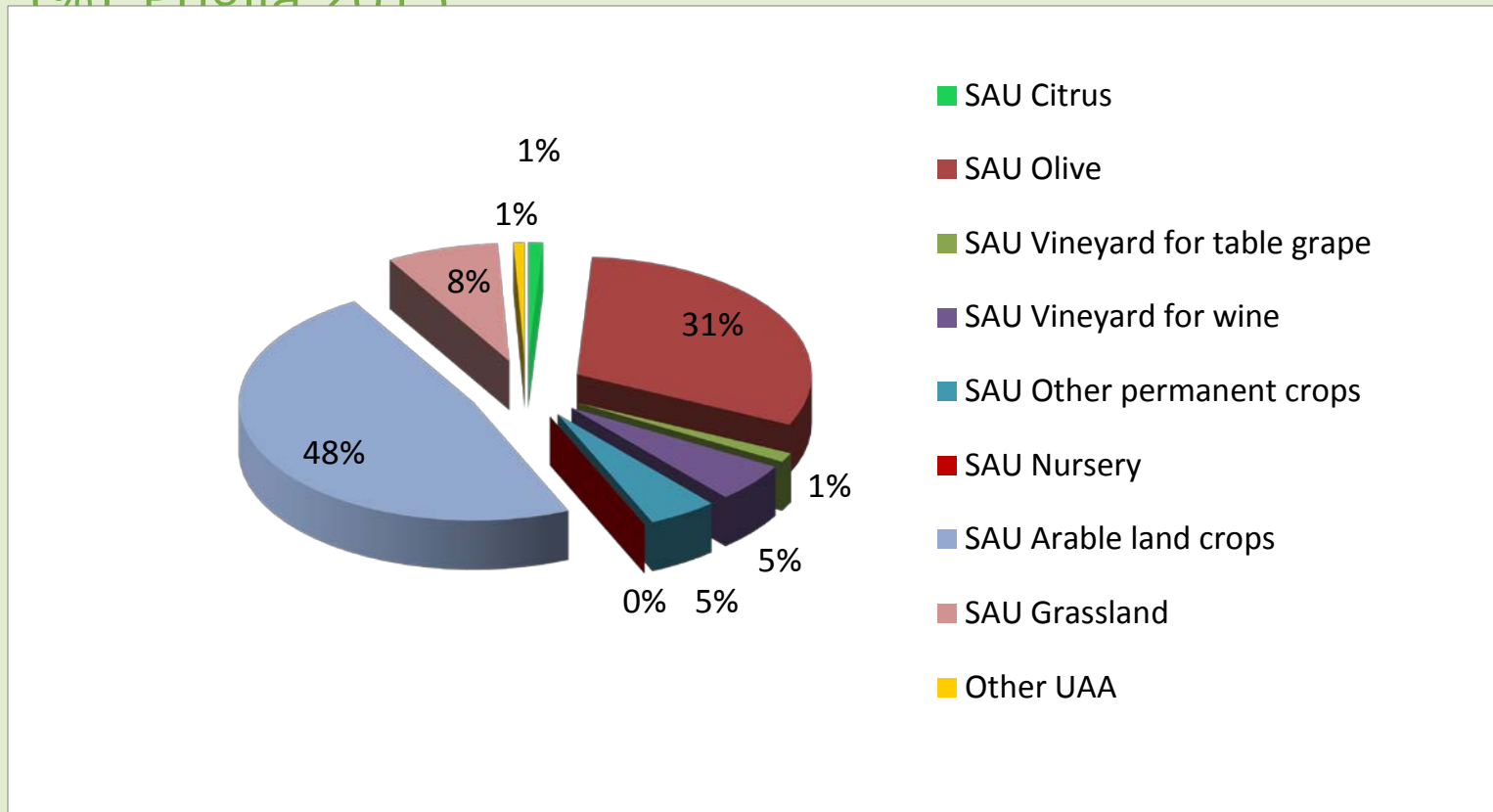
Chart 1: Organic sector in Puglia: Operators (n.) e Total Utilized Agricultural Area (ha), 2000-2015



Sources: 2000-2007: Cardone e Pellegrino (2008); 2008-2009: Osservatorio Regionale sull'Agricoltura Biologica - Regione Puglia-IAMB; 2010-2012: SINAB; 2013-2015: Elaboration on data from Biobank ORAB - Regione Puglia-IAMB

Current situation of the Organic Sector

Chart 2: Total organic UAA by crop type (macro-scale) (%) Puglia 2015



Source: Elaboration ORAB Regione Puglia-IAMB on data from BioBank Open Project

Current situation of the Organic Sector

Table 1: Main specialized outlets for organic products, Puglia, 2014

Channel	Apulia	Italy	Apulia / Italy
	n.	n.	
Farms with farm gate sales*	83	1505	6%
Holiday farms	71	1553	5%
G.A.S. Solidarity-based Purchasing Groups	21	891	2%
Specialised Shops	61	1348	5%
Catering firms	1	406	0%
Street farmer markets	0	197	0%

(*) holidays farms excluded

Source: Authors' own elaboration on data from Tutto Bio Biobank, 2015

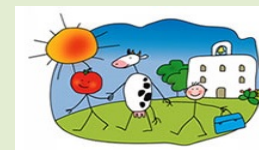
Current market and policy

- BIOL Prize



Since 1996, international competition for the best organic extra virgin olive oils, attracting every year more than 300 producers from 17 different countries worldwide

- Educational Farms



Project launched in connection with the Regional Law n.2/2008 regulating the recognition, accreditation and activities of educational farms; a number of organic farms in the Taste&Tour in Masseria Consortium

- Campagna Amica



Marketing project by Coldiretti to promote direct selling of local and seasonal products and enhance urban-rural relations (farmers' markets, shops and events); various organic farmers involved

Current market and policy

- Rural Development Programme 2014-

- Measure M11 – Organic Farming
- Measure M01 – Knowledge transfer and information actions
- Measure M02 – Advisory services, farm management and farm relief services
- Measure M03 – Quality schemes for agricultural products, and foodstuffs
- Measure M09 – Setting up of producers groups and organisations
- Measure M16 – Cooperation



- Regional Observatory on Organic Agriculture

Since 2007, management of regional organic statistics, information desk, NAP promotional projects, support to RDP Managing Authority for the implementation of Measure 11-

Key challenges and opportunities

Challenges

- Enhance the provision of technical advice and business advisory services
- Supply chain development
- Internationalization
- Promote local consumption and green procurement
- Effectively include organic SMEs in territorial development
- Ensure sustainability to successful regional organic initiatives

Opportunities

- Increasing demand for quality food products (organics, GIs, socially responsible)
- Excellent production potential and consolidated experience in OF; rich regional enogastronomic tradition
- Successful “Apulia” brand (agro-food, tourism, culture...)
- Organic actors’ involvement in various tourist, social, educational (alternative and innovative) initiatives

Main stakeholders involved

- Producers Organisations
- Certification Bodies
- CIBI (Consorzio Italiano per il Biologico), Consorzio Puglia Natura
- AIAB
- CIHEAM Bari, University of Bari
- FederBIO Puglia (regional branch of the Italian Federation of Organic and Biodynamic Agriculture)
- SMEs
- Apulia Region Departments (Agriculture, Environment, Economic Development, Education, Health, Tourism)
- Social Agriculture Forum – Puglia
- CNA (National Confederation of Crafts and Small and Medium Enterprises) – local branch
- Agricultural professional organisations
- Unioncamere Puglia (organisation of Apulia Chambers of Commerce)

Project expectations

- Enhance the networking among organic actors operating at the regional level
- Build a broader alliance at regional level for organic sector development and cross-sectoral collaboration
- Contribute to tailor regional policy making (and funding instruments) to the needs and market potential of local SMEs interested to valorise Apulia organic products

Policy Instrument:

Operational Programme ERDF Puglia Region 2014-2020

- Multi-fund program ensuring ERDF-ESF full integration and coordination with cohesion policy and CAP
- Approved in August 2015
- Puglia Region Managing Authority of OP ERDF-ESF 2014-2020
- Axis III Competitiveness of SMEs
 - **IP.3a** Promoting entrepreneurship, in particular facilitating the economic exploitation of new ideas and the creation of new companies through business incubators
 - **IP.3b** Developing and implementing new business models for SMEs, in particular with regard to internationalisation
 - **IP.3c** Supporting the creation and the extension of advanced capacities for product and service development

Policy Instrument: Operational Programme ERDF Puglia Region 2014-2020 /Axis III Competitiveness of SMEs

Investment Priority	Actions	Brainstorming about SME organics improvements	SME organics areas
IP.3a Promoting entrepreneurship, in particular facilitating the economic exploitation of new ideas and the creation of new companies through business incubators	Action 3.7 Intervention for the support of ICT solutions in production processes of SMEs	Introduce innovative ITC solutions in production and post-harvest; smart labels for consumers; mobile and social apps on organic trail initiatives	Production & processing Commercialisation & marketing Training & advice
IP.3b Developing and implementing new business models for SMEs, in particular with regard to internationalisation	Action 3.4 Interventions for the business support of cultural sectors, tourism, creative and performing sector	Support the development of organic trails and similar initiatives linking GIs and organic products to territorial development processes; networking of educational organic farms and other relevant actors	Commercialisation & marketing Training & advice
	Action 3.5 Interventions to strengthen the level of internationalization of production systems	Strengthen positive export trend of agro-food sector and support internationalisation of organic enterprises	Commercialisation & marketing Organic value chain efficiency and governance Training & advice
IP.3c Supporting the creation and the extension of advanced capacities for product and service development	Action 3.1 Interventions to relaunch investments in the production system	Support joint actions/investments in tangible and intangible assets for organic enterprises	Production & processing Commercialisation & marketing Training & advice
	Action 3.2 Interventions to strengthen economic activities with social content	Support the involvement of organic actors in social and social innovation initiatives	Commercialisation & marketing Training & advice

Thank you



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