

The Italian olive oil sector: experiences of sustainability and territorial valorisation

Civil Dialogue Group on Horticulture, Olives and Spirits
19/11/2021

Benedetto Fracchiolla



Who we are



Finoliva Global Service spa

24.000 **Produttori coinvolti**

82 **cooperative/frantoi aziendali**

21 **Organizzazioni di produttori**

Regioni coinvolte Calabria - Puglia
Sicilia

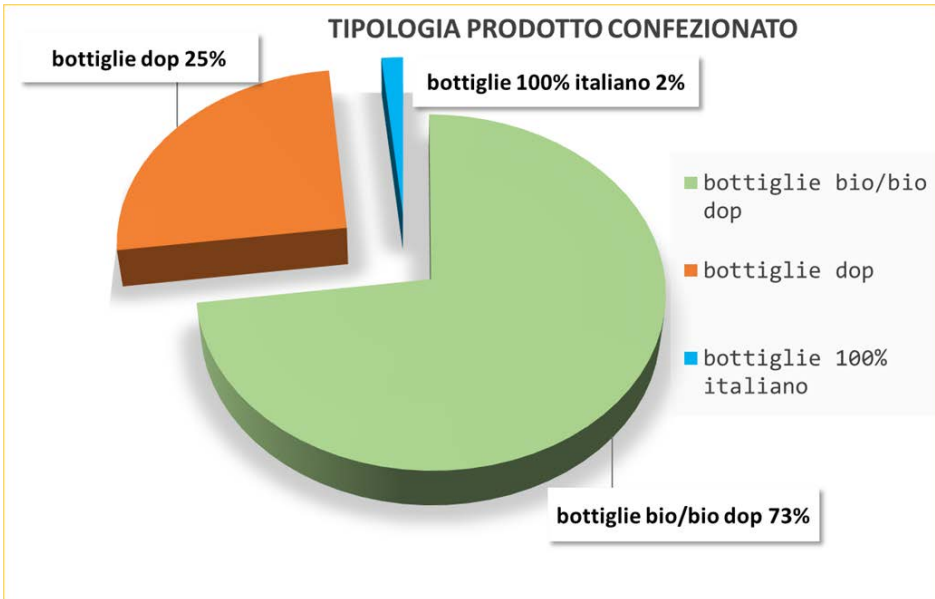


- Certification UNI EN ISO 14001
- Since 2011 a solar energy plant that powers the entire packaging phase of our plants
- 7 product certifications
- 5 quality system certifications
- 2 economic-environmental-social sustainability certifications

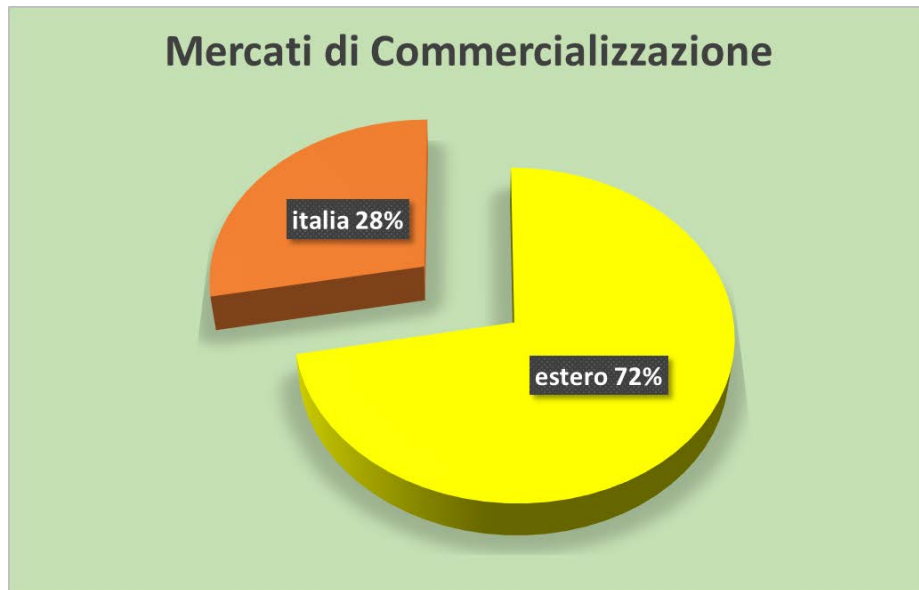


Consorzio Italiano Oli
C.I.O. Società Cooperativa a Responsabilità Limitata

Our production and market



- 42 foreign countries with special focus on the USA and Japan
- 42 references, own brand and third brands



Increasingly more sustainable the Italians' shopping basket

- ▶ 9 in 10 Italians pay attention to sustainability when buying food and beverages
- ▶ 1 in 2 Italians willing to pay more for a sustainable food product
- ▶ 10 billion euros the value of green products in the Italian food basket



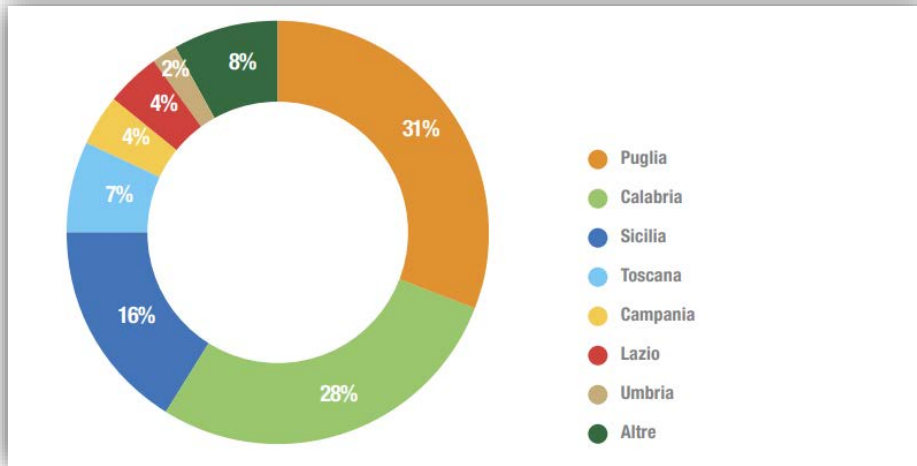
*Coop 2021 report

The Italian olive sector in brief

- ▶ Environmental, landscape, historical, cultural and anthropological value of olive groves.
- ▶ High potential for differentiating production, in terms of varieties (more than 500) and production modalities in respect of biodiversity
- ▶ 49 quality designations (PDO and PGI representing 40% of the EU designations for the sector)
- ▶ Top 5 designations by quantity: Terra di Bari, Toscano IGP, Val di Mazara, Sicilia IGP, Riviera Ligure
- ▶ Organic surfaces: 239.096 ha (about 23% of the total olive-growing area). Italy, 1st European country - Apulia 1st Italian region
- ▶ Elevato numero di filiere di prodotto olivicolo tracciate

The organic olive oil sector in Italy

DISTRIBUTION OF ORGANIC AREAS TO OIL TREES QUOTE %



- ✓ **Approx. 45,000 organic operators active in the olive oil sector (producers and preparers)**
- ✓ **Approx. 38,000 producers in 6 Italian regions (Centre-South)**
- ✓ **Approx. 1,700 organic olive oil mills**

* *Source: Sinab*

	Regioni	2018/2017 %	2019/2018 %
Trend Valori	Totale Italia	+11,6	+1,9
	Nord-Ovest	+18,9	+0,1
	Nord-Est	+21,2	+0,9
	Centro e Sardegna	+6,8	+7,1
	Sud e Sicilia	-20,5	+1,2
Trend Volumi	Totale Italia	+15,2	+6,4
	Nord-Ovest	+31,5	+5,6
	Nord-Est	+29,8	+8,1
	Centro e Sardegna	+12,8	+12,2
	Sud e Sicilia	-25,3	-5,9

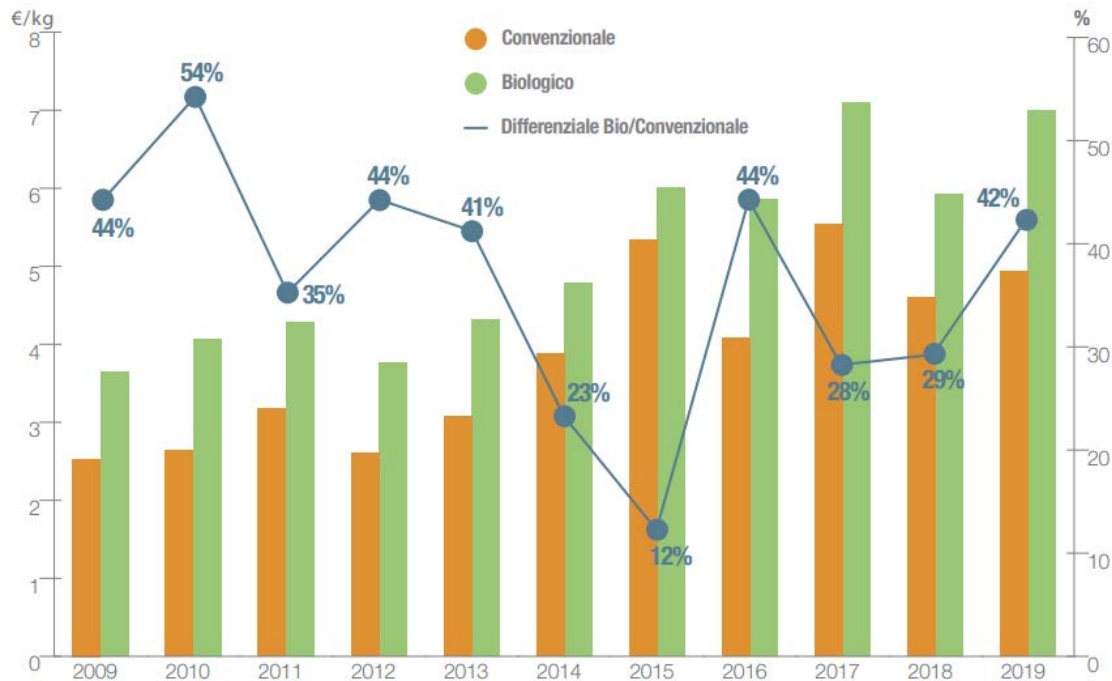
SALE TRENDS OF EXTRA VIRGIN OLIVE OIL FROM ORGANIC OLIVE TREES BY GEOGRAPHICAL AREA

YEARS 2017 - 2019

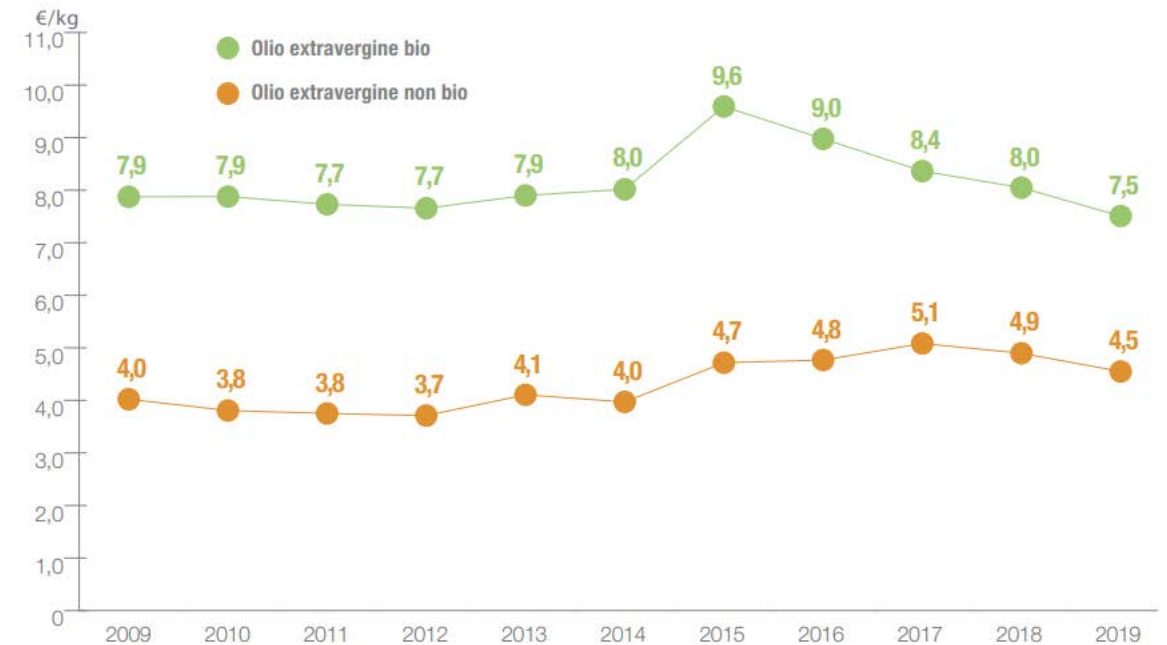
% CHANGE IN CONSUMER VALUE

The prices of organic olive oil

PRICE DIFFERENTIAL OF ORGANIC AND CONVENTIONAL OLIVE OIL TO THE FARMER



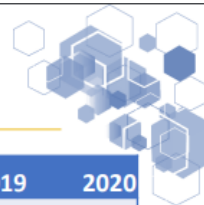
CONSUMER PRICE EVOLUTION FOR EXTRA VIRGIN OLIVE OIL IN LARGE-SCALE RETAIL TRADE



Source: Sinab

The prices of designations

I PREZZI DELLE DOP (€/CHILO)



	2015	2016	2017	2018	2019	2020
Aprutino pescarese	6,35	5,99	7,37	6,72	6,87	6,72
Brisighella	20,21	18,74	23,70	22,54	22,00	22,00
Bruzio	7,30	7,05	7,47	7,65	7,74	7,27
Canino	9,00	9,07	9,61	8,30	7,33	7,04
Chianti classico	11,50	9,25	9,91	11,49	11,69	13,07
Colline teatine	6,34	5,95	7,04	6,80	6,91	6,73
Dauno	5,75	4,42	5,70	4,70	5,2	3,52
Garda	19,92	13,88	13,78	16,13	17,00	17,00
Lametia	8,08	7,89	7,99	8,02	7,98	7,67
Monte Etna	6,90	7,25	8,78	7,98	7,51	5,78
Monti Iblei	7,84	8,04	8,77	8,33	9,87	8,03
Riviera ligure	12,61	11,28	11,75	11,19	10,86	11,27
Terre di Bari	5,34	4,09	5,47	4,65	5,26	3,61
Umbria	8,75	8,78	9,34	9,99	8,51	8,25
Val di Mazzara	5,92	4,73	6,92	5,68	6,84	4,66
Valli trapanesi	5,92	4,58	6,77	5,47	6,83	4,64
Toscana Igp	7,47	7,57	9,07	9,09	7,67	8,31
Sicilia Igp				5,45	6,67	4,69

The stock market for extra virgin olive oil in the square of Bari

**CAMERA DI COMMERCIO, INDUSTRIA, ARTIGIANATO E AGRICOLTURA
BARI
BORSA MERCI
COMMISSIONE OLIO**

Prezzi rilevati il 02.11.2021 giornata di mercato dell'olio

Commento: quotata la nuova produzione di extra vergine di oliva.

I prezzi indicati sono pubblicati a fini specificatamente informativi; sono rilevati con riferimento esclusivo alla fase di contrattazione tra produttore e mediatore/grossista/rivenditore; sono calcolati in Euro al Kg, franco partenza/arrivo e IVA esclusa (merce grezza alla produzione); si riferiscono ai sette giorni antecedenti la data del presente listino compresa la giornata odierna; sono formulati in base a valore qualitativo, provenienza e varietà del prodotto. Novità e prezzi variati rispetto al listino precedente sono evidenziati con sfondo grigio. I prezzi degli oli di oliva, dell'olio di sansa di oliva, dell'olio grezzo di sansa di olive e degli oli acidi di raffinazione (oleine) sono riferiti a merce prodotta nel territorio di competenza della CCIAA di Bari e cioè nelle province di Bari e Barletta, Andria, Trani (solo comuni ex provincia di Bari).

		Prezzi in Euro al Kg	
		Min	Max
OLIO DI OLIVA	<i>merce grezza alla produzione</i>		
	Extra Vergine nuova produzione	con acidità max 0,4% (*)	4,50 4,70
	Extra Vergine	con acidità max 0,4% (*)	4,10 4,30
	Extra Vergine	con acidità max 0,8% (*)	n.q. n.q.
	Extra Vergine tracciato ISO 22005	con acidità max 0,4% (*)	n.q. n.q.
	Extra Vergine Biologico		4,50 4,70
	Extra Vergine Dop Terra di Bari		n.q. n.q.
	Vergine	con acidità max 2% (*)	n.q. n.q.
	Lampante	con acidità base 20% (max 0,7%)	2,55
	Raffinato	con acidità max 0,3% (*)	2,98
OLIO DI SANSI DI OLIVA		raffinato acidità fino a 0,3%	1,58
OLIO GREZZO DI SANSI DI OLIVA		estratto con solvente (esano)	
		acidità base 3% max 5%	n.q.
		acidità base 5% max 10%	n.q.
		acidità base 10% max 15%	n.q.
		acidità base 15% max 20%	n.q.

Differentiation as a strategic driver

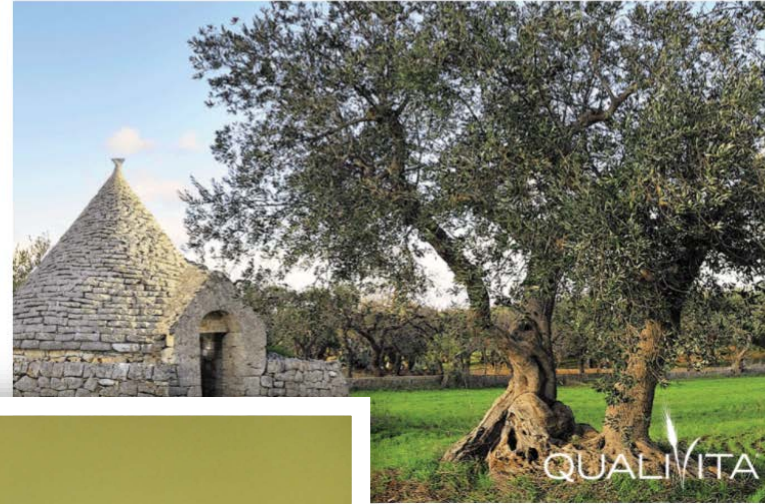
- ▶ Aiming at organic and geographical indications
- ▶ Aiming for quality and sustainability
- ▶ Focusing on the relationship with the territory
- ▶ Focusing on transparency and traceability



1. Organic and geographical indications ...a growing trend



Terra di Bari DOP – Olio EVO
#TERRADIBARIDOP



ORGANISMO DEI PRODUTTORI



CONSORZIO PER LA VALORIZZAZIONE E LA
TUTELA DELL'OLIO EXTRAVERGINE DI OLIVA A
D.O.P. TERRA DI BARI
Corso Cavour, 2
Bari (BA)
Tel: +39 080 2174455



ORGANISMO DI CONTROLLO



CCIAA DI BARI
Corso Cavour, 2
Bari (BA)
Tel: +39 080 2174111

2. Quality and sustainability

... increasingly appreciated values

- Implementation of Sustainability Standard with sector industries, starting with production
- Labelling to improve communication to the consumer
- Producing EVO oil to the best of known practices to ensure a sustainable product in the broadest sense of the term



Economic: ability to generate income and employment

Environmental: ability to maintain quality and reproducibility of natural resources

Social: ability to ensure conditions of human well-being (human rights, labour practices, fair operating practices, consumer protection, community involvement and development)

3. The relationship with the territory ...an essential relationship

- ▶ The “Districts of food” are recognised by the Italian Ministry of Agriculture.
- ▶ The *Biodistrict of the Blades*: the blades constitute a geological, landscape and ecological element characterising the territory.
- ▶ They are also capable of generating biodiversity and agrobiodiversity. The Bio-District is understood as a territory dedicated to organic farming that brings together agriculture, landscape, environment and urban communities.
- ▶ Objective: supporting, valorising and developing these resources in an integrated manner
- ▶ The Biodistrict of the Blades: management by the 70% of the olive producers (30% by municipalities, cultural associations, tourism, etc.).



Territorio e colture

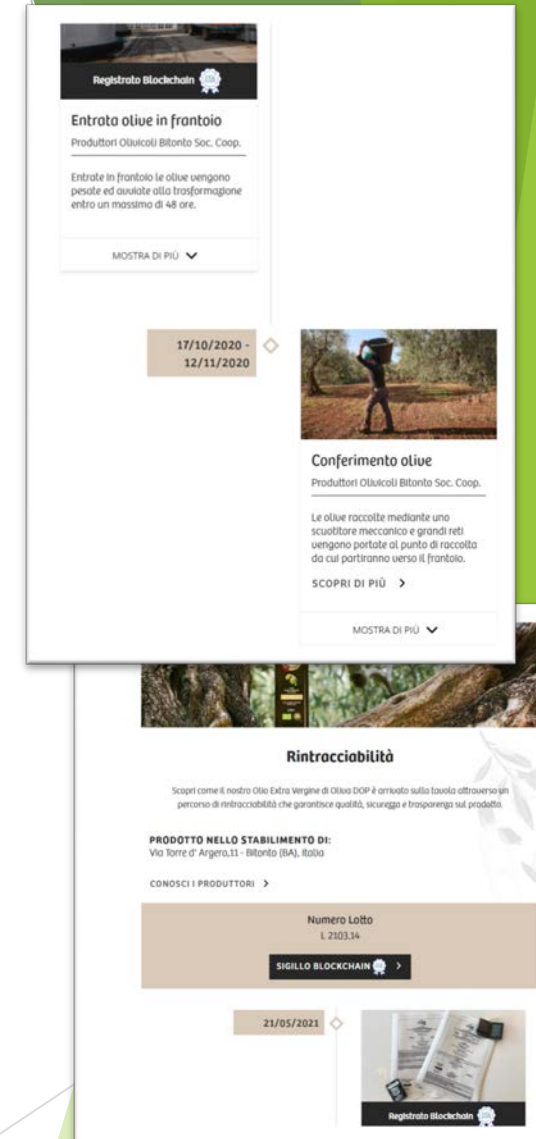
Territorio:
40.000 ettari
Biologico:
3.200 ettari

Culture:
Olivo
Vite
Creali
Altre colture



4. Transparency and innovative traceability ... the first experiments with blockchain ...

- ▶ Thanks to technology, it is possible to geolocate all the producers' fields and collect, in a certified way, all the data inherent in the techniques used, with reference to each individual producer and worker, from the fields to the processing and packaging stages.
- ▶ The QR code on the collar of the bottles will allow, through a smartphone, access to a large amount of information, recorded on blockchain technology. In particular: the characteristics, the territory from which it originates, the cultivation and production method used... even panel tests and multi-residual analysis.
- ▶ Value to agricultural and supply chain data



*Thank you for your
attention!*

Benedetto Fracchiolla

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BIO-DISTRETTO
delle lame
Punti di Puglia - Basilicata

MEDITERRE
bio