ORGANIC OLIVE GROVE FARMING IN ITALY: ECONOMICAL AND MARKETING ASPECTS.[1]

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Introduction

In the last few years all italian olive grove farmers had to face three challenges: the growing interest for high quality olive oil production, environment problems, the Reform of the Organizzazione Comune di Mercato (INEA 1998, Marchini e Pampanini 2000).

The olive grove farming in Italy continues to be pulverized: producers in 1990 were more than 1,1 millions in about 1,01 millions ha, reduced to 909.000 producers in 1995 for 994.00 ha (INEA 1998). Comparing this pulverized primary sector, as it seems to be, it is possible to verify a sort of concentration in the processing stage: oil presses are 7.000 (too much compared with Spain where there are 2.500 oil presses) and this concentration grows during the bottling and the marketing stage. This situation does not necessary mean that the value added belongs to the national producers, as their profits are still low.

Leaving apart those questions we may say that organic extra-vergin olive oil would be able to have all the necessary requirements to become part of those italian products that are able to survive in the national and international market, as long as producers pay attention to: a) quality and nutritional aspects, b) method of production, which guarantees the consumer and the preservation of natural balance, c) possibility to enjoy financial supports by EU made for compatible products, d) possibility to find out new markets (particularly abroad).

Unfortunately our acqaintances about organic olive grove farming (micro and macro economical aspects) and organic oil market are rare, often split in time and space and usually too much dated.

Consumption and distribution

Referring to market in general the per capita consumption a year of olive oil is 23, 3 kg in Greece, 20,5 kg in Lybia, 11, 9 kg in Italy, 10, 9 kg in Spain, 7,7 kg in Turkey. The european average is only 4,3 kg. Talking about the general consumption in every single country one can see that Italy is the first, followed by Spain, Greece, Turkey and Tunisia. Those last countries are in excess compared with their inner food requirements, therefore they exert strong pressure on Italy, which imports every year olive oil in large numbers. About 2-2,5 millions quintals are imported in Italy to feed the inner market (which is about 6 millions q) and the export market (about 1 million q).

The world consumption of olive oil, thanks to the diffusion of the Mediterranean diet, the appreciation of the nutritional virtues and the improvement of the quality, seems to have an upward trend. That image of genuinity connected specially to the absence of industrial

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manipulation has interested those consumers who are aware of all the healthy aspects in the nutrition. The sales of extra-vergin olive oil, thanks to this new awareness, have risen. One can say that, generally speaking, the number of consumers interested in the organoleptic and qualitative differences of oil is growing. It is in this new sector of sales that organic olive oil could carve a niche in the market.
The Bio Bank report (Lunati 1999) shows also consumers' behaviour in Italy in regard to the organic oil and the other organic products. This report says that in the South of Italy about 2.000.000 people know the extra-vergin orgainc olive oil, 300.000 of them have bought it once and 220.000 have bought it more than oce; in the Center of Italy 1.500.000 people know the extra-vergin organic olive oil, about 200.000 people have bought it once and 120.000 bought it more than once. While in the North of Italy 3.270.000 people know the extra-vergin organic olive oil, 1.250.000 have bought it once and 710.000 have bought it more than once. It follows that organic olive oil market is placed in the North of our country, where a clear preference of consumers is in the regions of the North West, such as Piemonte, Lombardia, Liguria. Those regions, apart from the last one, are not olive oil producers.

Marketing channels

In the italian southern countries the 34,7% of organic olive oil is directly sold by the producer, the 13,2% by the specialized shops and the 52,1% through Iper and Supermarkets; in the Center of Italy the 15,2% of organic olive oil is directly sold by the producer, the 58, 4% in retalis shops and the 26,2% through the big distribution; in the North East the 27,9% of organic olive oil is sold by the producer, the 39,2% in specialized shops and the 32,9% through the big distribution, while in the North West the 4,2% is sold in the conventional shops, the 48, 2% in specialized shops and the 47,6% is sold through Iper and Supermarkets.
The italian extra-vergin olive oil is sold in the best grocer's shops and in the shops for organic products (See table 1) as well as in european and american countries. *Cicia, del Giudice* and *Quarto* (2000) remember how in 1996 a large quantity of organic olive oil from Campania has been sold in Switzerland, Germany and even Japan. In this way it was easier to recognize the right prize for the local farmers (18.400 £/Kg in 1996). According to what Guccione says (2001), olive oil in the last years is one of the few products among those of the sicilian agro-products that its exportation has grown, for both quantity and value. The value has risen with an increase of the middle unit price compared with the last years. Many italian producers are visible on line in internet and the organic olive oil is sold even by male-order sale, through catalogues specialized in organic products or high quality products. Organic olive oil is also used to exploit many precious products such as the packaging of olive paste, sauces, juices and juices in organic olive oil.

Prices

The price of the exrta-vergin organic olive oil at the production and not bottled seems to be quite variable, it depends on the quantity of the marketing, on the micro-net of direct marketing available for the producers, on their bargaining power. Somehow the market starts to give signs of heaviness, for example prices in Umbria show a sort of decrease trend (see table 7).
Prices to the consumers are extremely variable, they depend on the dimension of the single bottle, on the shop and on the way of marketing (de luxe retail, organized retail, supermarket, male catalogue, internet). Anyway it is important to underline that organic olive oil prices should not seem too expensive because they are the same (and sometimes even lower) as those of the conventional extra-vergin olive oil, well packaged and promoted.
We have already talked about this situation (Santucci 1997) and we can confirm now what we said before. For example organic olive oil in specialized organic shops and grocer's shops in Perugia (see table 2) is sold at 23.800 - 31.200 £/Litres, exactly inbetween the range of prices of the conventional high quality olive oil that one can buy in Umbria or Tuscany, their prices are between 18.400 - 52.000 £/Kg. The average price of organic olive oil is about £ 27.000, while the average price of conventional extra-vergin olive oil is £ 28.000, the DOP oil are those that have the highest average price, about 32.000 £/Litres.
Going through internet (see table 3), without a particular and complex analysis, one can find extra-vergin conventional olive oil at 70 - 72.000 £/Litres and DOP oil at 78.000 £/Litres, while organic olive oil costs only 14 -17.000 £/Litres. In mean the 23 samples of organic oil cost approximately £ 33.000, the 38 samples of conventional extra-vergin olive oil cost £ 37.000 and even in this case the 6 DOP samples of oil present the most expensive price: more than 50.000 £/Litres.

Organic areas in italy

Olive tree is easy to convert into organic cultivation as it is characterized by an agro-echosystem extremely adapted to the different italian environments and it does not require (contrary to other products) too many innovations (Lunetta 1997, Vizioli 1997, Scazziota, Minisci ed Agostio 1997, Proietti 1998).
Hence olive grove cultivation, specially the one aimed to the oil’s production, is one of the most important organic agricolture in the italian panorama and it has had a great development. Only 13 years ago, in 1998, there were just 187 ha which became 4.185 in 1993 and than 6.261 in 1996 (Santucci 1997). To these areas one had to add larger olive groves in convertion. The upward trend of the areas with olive groves is still strong (see table 4) and those areas on the December the 31st 1999 were near to be 90.000 ha, which is about the 9,7% of the whole national organic area. About the conventional olive oil production Apulia and Calabria are the leader regions for the organic olive oil cultivation. Calabria concentrates the 34,9% and Apulia the 27, 3% of the national organic olive grove farming. The organic effect on

the whole is particularly strong in Sardenia where it touches the 26% and in Calabria where it surpasses the 20%, in the third position we find Molise where organic olive grove farming represents the 8,7% of the entire agriculture.
Talking about the structure of the production we should go back to 1998, at that time there were approximately 9.000 farms that were spread over the 85% of the territotry in the South and in the Islands of Italy, which means an area of 54.184 ha. (INIPA –AGER 1999). The farms of olive oil were just a few (see table 5), about 2.700 with considerable gathering in Apulia, Calabria and Sicily, followed by some consistent units in Campania and Tuscany.

Yeld of cultivation

Some years ago (Santucci 1997) the micro economical data about Sicily, Calabria, Tuscany and Umbria showed very different but generally good situations and their economical indicators were positive. More recent data about Umbria (Chiorri 2001) confirm this state even if it always presents positive and negative aspects depending on the deep eterogenity of the organic olive grove cultivation; economical analysis are not easy because of various factors such as slopes, dimension, distance of implantation, varieties mix, cultivation techniques and so on.
As we said before the price at the production of the product unpacked is still cheap, it is about 14-15.000 £/Kg, to this sum one should add 5.000 – 6.000 £/Litres of communitary subsidies.
With this level of price the fixed and the variable costs of the farms which have been studied are really different, so that if we compare an average net yeld of 3.000 £/Kg we can find really good and at the same time really bad situations.
A completely different question is the one about the profit of management. If it is calculated thinking that all factors of production should be paid with costs equal to the market prices we could say that in Umbria only in the last year it would have been possible to reach a positive average.

Conclusion

It is a matter of fact that the olive grove cultivation represents a considerable phenomenon among the italian organic panorama and that the extra-vergin organic olive oil is the top of this phenomenon and of the different politics of quality.
At the same time this is not a good reason to set back on the previous results, on the contrary it is necessary to continue making efforts for the improvement of the competitivity, for both single farms and system.
It is correct if we ask to the single producer (farmer and post – farmer) to undertake to reduce prices, to improve quality and to value his productions. We have also to request organic associations and conventional agricoltural associations, as well as public national and local bodies to think about aimed events and development strategies and not only of welfare. In this way the organic olive grove (and the

conventional) would be able to be appreciated on the national and on the international market.

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Tab. 1 - Sales channels of organic olive oil in Europe

Country	Direct to the Consumer	Specialized bio shop	Other specialized shop	Super and Iper	Total
Germania		65		35	100
Danimarca		2		98	100
Spagna	10	60		30	100
Finlandia	10	30		60	100
Grecia	10		80	10	100
Italia	10	80		10	100
Paesi Bassi		100			100
Portogallo	5			95	100
Svezia	2-5			95-98	100
Svizzera		15		85	100
Rep. Ceca			85	15	100

Source: Michelsen et al. 1998

Tab. 2 - Retail prices in Perugia

Shop / oil lables	Type	£ / Litres
- Organic and quality retail		
Marfuga (Umbria)		27.900
Natura è	bio	23.800
- Boutique alimentare		
Marfuga affiorante	dop	52.000
Argiano (Montalcino, Toscana)		40.000
Marfuga (Umbria)		36.000
Tenuta S. Guido (Toscana)		31.300
Ornellaia (Toscana)		31.300
Umbria di Caprai		31.200
Bio Giano dell'Umbria	bio	31.200
Sportoletti (Umbria)		28.300
Marfuga	dop	26.700
Olea (Umbria)	bio	26.000
San Marco (Umbria)	bio	24.800
Lungarotti Cantico (Umbria)		23.000
Marfuga (Umbria)		21.600
Olevis (Umbria)		20.800
Olio ELITE		18.600
Torre Matigge (Tipo Flaminio)	dop	18.400

27475
32366,66667
27809,09091

Tab. 3 - Extra-virgin olive oil prices from the Internet, April 2001

Region	Type	l	£/Litres	Region	Type	l	£/Litres
Lombardia				**Campania**			
Garda	Dop	0,50	55.000	Colline Salernitane	Dop	0,50	78.000
Liguria				Terre dei Monaci	Dop	0,50	32.000
Olio Riviera dei Fiori		0,50	72.000	Olio del Tempio		0,50	30.000
Costa dei Rosmarini		0,50	56.000	Iolao		0,50	30.000
Drupa Aurea		0,50	55.800	D'Olia	Bio	0,50	30.000
Vallaurea		0,50	45.500	Primo Fiore Iacobucci		0,75	21.400
Gaziello		1,00	30.000	San Paolo		0,75	21.000
Raineri Integrale		0,75	17.307	La Molara	Bio	0,50	20.000
Emilia Romagna				Bioitalia	Bio	0,75	20.000
Terra di Brisighella	Dop	0,75	52.000	**Puglia**			
Come una Volta		0,50	38.000	Ciro Federico		0,75	34.000
Toscana				Galatino	Bio	0,75	33.000
Fattoria Casamora		0,50	60.000	Parco del Gargano	Bio	0,75	33.000
Vicopisano		0,75	52.000	Le Quattro Contrade		0,50	32.000
Tigliano		0,50	50.000	Velato Lisa di Sangro		0,75	30.250
Casetta d'Ulisse		0,50	42.000	Marcinase	Bio	0,50	30.000
Buon Delmonte		0,50	40.000	Casale Cassitto	Bio	0,50	25.000
Olio del Buongustaio		1,00	22.000	Agriverde	Bio	0,50	24.000
Umbria				De Palma	Bio	0,50	23.400
Le Palombe	Bio	0,50	78.000	Vallevona	Bio	0,75	23.000
Primo Fiore		0,50	65.000	Coretum	Bio	0,50	22.000
Il Torrione		1,00	37.000	Nobile di Puglia		0,75	17.987
Olio Umbro Dop	Dop	0,75	33.000	Zambardo	Bio	0,75	17.600
Torre Matigge		0,75	31.000	**Calabria**			
Farchioni	Bio	0,75	14.533	Manca del Bosco	Bio	0,50	44.000
Monini		0,50	11.980	San Giusto		0,75	31.000
Pieve Antica		0,75	8.453	Gabro	Bio	0,75	21.700
Marche				Parisi	Bio	0,50	21.000
Cilestra		0,50	54.000	**Sicilia**			
Arkade Oasi degli Angeli		0,75	51.000	U Trappitu		0,50	70.000
Le Magnolie	Dop	0,75	51.000	Midalà	Bio	0,50	70.000
Santa Casa		0,50	31.200	Fattoria Titone	Bio	0,50	50.000
Lazio				Pianogrillo	Bio	0,50	48.000
La Mola		0,50	44.000	Federico II		0,50	36.000
Basilicata				Antiche Conserve Med.		0,75	26.000
Sant'Angelo		0,50	23.000	Oro di Canalotto	Bio	0,50	22.600
				Sardegna			
				Pirastu Pintu	Bio	0,50	70.000
				Antichi Uliveti del Prato		0,50	50.000
				San Pasquale	Bio	0,50	27.000
				Montiferru		0,50	22.200
				Colline Sarde		0,75	21.000

Tab. 4 - Growth of the organic and in convertion olive grove areas

Regioni	1994		1998		1999		2000		1994/00	Bio/Tot
	ha	%	ha	%	ha	%	ha	%	var. %	%
Piemonte	1	**0,0**	1	0,0	571	1,0	1	0,0	0,0	nd
Valle D'Aosta										
Lombardia	11	**0,2**	34	0,1	239	0,4	86	0,1	681,8	nd
Trentino Alto Adige	0	**0,0**	6	0,0	92	0,2	5	0,0		nd
Veneto	101	**1,9**	73	0,2	534	0,9	82	0,1	-18,8	nd
Friuli Venezia Giulia	0	**0,0**	2	0,0	5	0,0	3	0,0		nd
Liguria	18	**0,3**	124	0,3	165	0,3	143	0,2	694,4	1,2
Emilia Romagna	11	**0,2**	46	0,1	159	0,3	176	0,2	1.500,0	nd
Toscana	1.336	**24,5**	2.433	5,4	1.877	3,1	6.418	7,2	380,4	7,6
Umbria	399	**7,3**	712	1,6	1.479	2,5	1.619	1,8	305,8	7,3
Marche	61	**1,1**	227	0,5	305	0,5	462	0,5	657,4	5,6
Lazio	96	**1,8**	3.032	6,7	2.260	3,8	2.929	3,3	2.951,0	4,0
Abruzzo	108	**2,0**	317	0,7	483	0,8	1.104	1,2	922,2	3,2
Molise	51	**0,9**	57	0,1	144	0,2	971	1,1	1.803,9	8,7
Campania	259	**4,8**	1.822	4,0	1.226	2,0	2.072	2,3	700,0	3,3
Puglia	396	**7,3**	21.707	48,2	18.575	31,0	24.174	27,3	6.004,5	6,7
Basilicata	16	**0,3**	103	0,2	457	0,8	237	0,3	1.381,3	1,0
Calabria	1.342	**24,6**	5.963	13,3	10.113	16,9	30.948	34,9	2.206,1	20,3
Sicilia	1.030	**18,9**	5.279	11,7	7.237	12,1	8.721	9,8	746,7	7,9
Sardegna	211	**3,9**	3.061	6,8	14.011	23,4	8.494	9,6	3.925,6	25,9
Italia	**5.447**	**100,0**	**44.999**	100,0	**59.933**	100,0	**88.644**	100,0	1.527,4	8,9

Source: Lunati 2000, 2001

Tab. 5 - Organic olive gorve farms studied for country and dimension (1998)

Region	< 2 ha		2-5 ha		5-10 ha		10-20 ha		20-40 ha		40-100 ha		> 100 ha		Total		
	n.	SAU	n.	SAU	n.	SAU	n.	SAU	n.	SAU	n.	SAU	n.	SAU	n.	SAU	Average
Piemonte	0	0	0	0	0	0	0	0	1	30	0	0	0	0	1	30	30
Valle D'Aosta	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Lombardia	4	6	1	3	1	9	0	0	0	0	0	0	0	0	6	18	3
Trentino Alto Adige	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Veneto	2	1	2	5	3	19	0	0	0	0	0	0	0	0	7	25	4
Friuli Venezia Giulia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Liguria	3	4	2	6	2	11	0	0	0	0	0	0	0	0	7	21	3
Emilia Romagna	3	3	1	3	1	8	0	0	0	0	0	0	0	0	5	14	3
Toscana	9	14	23	78	22	154	28	400	7	219	6	393	5	1.397	100	2.655	27
Umbria	2	2	11	42	7	48	6	84	1	22	2	107	0	0	29	305	11
Marche	12	18	5	17	5	42	2	27	0	0	0	0	0	0	24	104	4
Lazio	11	12	33	105	17	119	11	159	6	181	2	111	0	0	80	687	9
Abruzzo	6	8	10	36	3	25	5	72	1	23	1	56	0	0	26	220	8
Molise	14	17	20	61	17	121	6	89	4	115	0	0	0	0	61	403	7
Campania	24	28	43	148	29	217	12	156	3	87	0	0	0	0	111	636	6
Puglia	69	96	179	622	187	1.371	168	2.409	98	2.715	44	2.481	18	3.031	763	12.725	17
Basilicata	1	1	2	9	0	0	0	0	1	24	0	0	0	0	4	34	9
Calabria	88	134	235	808	192	1.368	116	1.610	70	1.965	34	2.138	7	1.265	742	9.288	13
Sicilia	94	142	215	709	124	890	84	1.231	68	1.929	30	1.700	16	2.638	631	9.239	15
Sardegna	47	63	56	192	32	212	4	50	6	155	0	0	1	113	146	785	5
Total	389	549	838	2.845	642	4.614	442	6.286	266	7.465	119	6.985	47	8.444	2.743	37.188	14
%	14,2	1,5	30,6	7,7	23,4	12,4	16,1	16,9	9,7	20,1	4,3	18,8	1,7	22,7	100,0	100,0	

Source: INIPA-AGER, 1999.

Years, Cases, Olives, Oil

Tab. 6 - Umbria, trend of prices (000 £ / Litres)

Years	Cases n.	Olives				Oil			
		Avg	Min	Max	D.S.	Avg	Min	Max	D.S.
1992	9	233	231	449	73	1.989	1.540	2.567	309
1993	14	141	141	148	2	1.865	1.478	2.217	182
1994	14	175	141	295	41	1.768	1.422	2.134	165
1995	9	162	141	180	14	1.421	1.125	2.025	239
1996	15	190	154	270	36	1.379	1.083	2.166	324
1997	15	216	167	321	38	1.426	1.118	2.129	251
1998	11	247	193	321	38	1.485	976	1.873	315
1999	10	219	193	276	30	1.370	1.019	1.834	250
Totale	97	215	141	449	192	1.442	976	2.567	512

Source: Chiorri 2001

Tab. 7 - Umbria, middle gross production to be sold

Years	000 Lit./Litres				000 Lit./100 kg		
	PLV	oil	Ue contributes	% contributesi on PLV	PLV	oil	Ue contributes
1992	2.392	2.341	51	2,1	2.033	1.989	44
1993	2.018	1.906	112	5,5	1.974	1.865	109
1994	3.656	2.998	658	18,0	2.156	1.768	388
1995	4.226	3.052	1.175	27,8	1.968	1.421	547
1996	4.835	3.109	1.726	35,7	2.145	1.379	766
1997	4.247	3.025	1.222	28,8	2.002	1.426	576
1998	3.678	2.476	1.203	32,7	2.206	1.485	721
1999	5.234	3.869	1.365	26,1	1.853	1.370	483
Media	4.256	3.043	1.213	28,5	2.017	1.442	575

Source: Chiorri 2001.

92-84	9
95-96	32
97-99	29