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***Biological olive-growing in Italy, Spain and Greece: a comparative analysis***

The forum arranged by the International Observatory on the biological olive-growing, within the Biol Prize, has now come to its fourth edition.

Last years we gathered interesting economical and technical/agronomic information about the biological olive-growing both in the main producing countries (Italy, Spain and Greece) and in the less important countries, at least in terms of quantity, such as Portugal, Israel or Croatia.

In depth marketing studies in the field of biological olive oil were developed and submitted in each annual international forum.

Those studies focused on general matters, such as prices and commercial margins, as well as on specific issues such as packaging, labelling and e-commerce opportunities for biological olive marketing.

Naturally, there are still large technical and economical gaps of knowledge to be filled with additional efforts and deepening.

The aim of this work, also based on experiences, data and information gathered in the past editions of the international forum, is to present a comparative framework of the biological agriculture in the three main producing countries in the world: Italy, Spain and Greece.

The aim of this analysis is to understand possible similarities and/or differences, but mainly to evaluate the strong and weak points of the different national production systems, in order to lay the foundations for the creation of a strategy for the development of a sustainable olive-growing, from the environmental, economical and social point of view.

Italy is undoubtedly the first Country to make attempts and efforts to develop an olive-growing model, combining productive and economical needs with environmental and operators/consumers protection.

The first steps were taken by a restricted number of "pioneers" who, between the 70s and the 80s, in a general atmosphere of ostracism both from the academic and production world, started and firmly got ahead with a difficult conversion process of olive-growing to the principles and techniques of biological olive-growing.

Mainly based on ideology, this choice has led to interesting productive and economical results clearly confirmed by several scientific studies.

The early information and data on certified biological olive-growing in Italy go back to 1998 and report only 187 certified hectares all over the Country.

Reg. EC 2092/91, which clearly defines the principles for qualifying and marketing the agricultural products as biological products in the EU, is a very important step for the development and regulation of this field, previously based on regional regulations determining region by region, what could be considered as biological.

In 1993, after the approval and enforcement of the above said regulation, about 800 firms had already totally converted the olive groves to biological productions and 266 were under conversion. Such firms cultivated a total of 6000 hectares of biological olive groves.

In the same year the certified conversion firms were only 19.

But the increase of the cultivated surfaces strongly occurred only after the effective regional enforcement of the agro-environmental measures indicated in Reg. EC 2078/92.

In 5 years, the area cultivated with biological olive-trees has in fact decupled, from about 6000 hectares in 1993 to more than 59.000 in 1998.

A positive trend that, at the end of 2001, has led the surface used for biological olive-growing to 121.363 hectares, 46.000 of which are under conversion and more than 75.000 can be already classified as biologic.

The biological olive groves have overcome the 10% of the total national olive-tree covered surface and represent the 10% of the total biological surfaces in the Country. However, in some regions like Sardegna, the biological olive-growing is very remarkable and represents 1/4 of the regional olive-growing. In Calabria it represents the 20%.

In **Spain** the early experiences of application of the biological agriculture principles to the cultivation of olive groves go back to the second half of the 80s. Those first pioneer attempts seem to be generated mainly by economical reasons. The first Spanish producers were in fact driven to biological agriculture by the necessity to increase the profitability of the olive groves located in marginal areas, which were in difficulties due to the competitive pressure of the olive-tree yards on the plain, that were more productive and easier to be mechanized. This choice enabled to benefit of a *premium price* which compensated the lower physical productivity and the higher average production cost of the olive groves located in hill or mountain areas. In Spain, the biological olive-growing seems to be characterized by a more pragmatic approach since the very early stage, combining the economical with environmental sustainability.

The reconversion started with a poor store of knowledge and experience suitable for the specific territorial backgrounds. In the next years the knowledge increased thanks both to the on site research and experimentation and to the recourse to the experiences of Countries like Italy where the biological olive-growing already boasted an agronomic and commercial know-how.

The Spanish biological olive-growing framework has been strongly stimulated by the application of the aids provided for by Reg. ECC 2078/92 and appears to be very dynamic and in progress. This is proved by the increase in the surfaces interested by the biological agriculture, mainly determined by the full application of the incentives provided for by ACP in the second half of the 90s. In this country the support given to the biological olive-growing was equal to 195 Euro /ha and, even though it is lower than the one allowed in many Italian regions, it has been enough to generate a high production growth.

The total surface of the Spanish biological agriculture has increased in fact from 4.235 ha in 1993 to more than 485.000 ha in 2001, 242.000 of which are now totally converted and the remaining half is under conversion; in the same period the farms increased from only 396 units to 16.576. The surface of the **bio olive-tree** surface has increased from about 1.800 ha in 1993 (our estimates) to more than **82.000 ha** in 2001. It should be noted that in Spain the importance of the biological olive-growing within the biological agriculture is greater than in Italy.

With the 17% of biologically cultivated surfaces, it represents the most important productive section of the bio segment after the fodder cultures, grasses and pastures, whereas the large extension of the Spanish olive-growing (more than 2 millions of ha) has a still limited influence on the total of the national biological olive-growing (about 3,5 %).

Besides, the Spanish biological olive-growing is mainly concentrated in hill or even mountain areas (olive-trees can be found up to 1.000 meters) sometimes inside or near protected areas or natural parks. Such areas are often recognized as DOP.

Most of the Spanish biological olive oil (about the 70%) is destined for exportation. The main export market is France where it is packed and then marketed.

In **Greece** the early experimental cultures of biological olive-tree started in 1998 in the Southern Peloponnese, above all under the pressure of a German company interested in the importation of the bio oil. In the years between 1998 and 1992 about 70 producers were involved in this activity on a surface of 150 ha. The control and certification were made by foreign bodies, one German and the other Dutch. The first association of biological producers was established in 1985 and the most important control body only in 1993.

The first productions were obtained at the end of the 80s and concerned the raisins of the Northern Peloponnese and the production of the olive oil in the South. Till 1992 there are no official data on the biological agriculture. The biological agriculture, at least the certified one, starts officially in 1993 with a few hundreds of ha.

Also in this case an important factor of growth is determined by the implementation of the two community regulations which have regulated (reg. EC 2092/91) and provided incentives for (reg EC

2078/92) the biological agriculture. In a five-year period there has been an extraordinary increase of the surfaces cultivated with the biological methods and as a matter of fact in 1998 the biological olive groves were equal to 10.000 ha. The higher growth has occurred only after the actual application of the incentives provided for by ACP (Agricultural Community Policy), that is to say from 1996: in one year period (between 1996 and 1997) there has been an increase of the 97% of the cultivated surfaces. This positive expansive trend went on also in the more recent years, even if less rapidly, and at the end of 2001 the surfaces cultivated with biological agricultural methods were 15.500 ha, the 70% of which is now totally converted. Due to the large diffusion of the olive-tree in this Country (765.000 ha), the bio surfaces represent only the 2% of the total national olive-growing, but covers almost the 63% of the total bio surfaces. In other words, in Greece, speaking of biological agriculture means speaking of olive-growing.

As regards the oil marketing, this field is still strongly *export-oriented*; the 85% of the biological olive oil produced in Greece is exported.