



# **The agrifood system of Emilia-Romagna region**

*Structure, Economy, Excellence*



# Emilia-Romagna: territorial data

## Land and population

(Source: Istat)

|                       | Land area (km <sup>2</sup> ) | % of land | % of Italy | Inhabitants 1st Jan 2020 | % of inhabitants | % of Italy | Density (inhabitants/ km <sup>2</sup> ) |
|-----------------------|------------------------------|-----------|------------|--------------------------|------------------|------------|---|
| <b>Emilia-Romagna</b> | 22.453                       | 100,0     | 7,4        | 4.464.119                | 100,00           | 7,50       | 199                                     |
| <b>Mountain</b>       | 5.677                        | 25,3      | 5,3        | 186.387                  | 4,20             | 2,60       | 33                                      |
| <b>Hills</b>          | 6.202                        | 27,6      | 4,9        | 1.240.741                | 27,80            | 5,40       | 200                                     |
| <b>Plain</b>          | 10.573                       | 47,1      | 15,1       | 3.036.911                | 68,00            | 10,40      | 287                                     |

## Agricultural value added in Emilia-Romagna 2019

(Source: Istat, Territorial Economic Accounts)

### TOTAL REGIONAL VALUE ADDED:

146.732 million €  
9,15 % of value added in Italy

### AGRICULTURAL VALUE ADDED (current prices):

3.377 million €  
2,22 % of regional value added  
10,3 % of agricultural value added in Italy

### A European region with:

- Continental and Mediterranean products and excellences
- Leader in Italy and Europe in food
- Open to the world

### Main features:

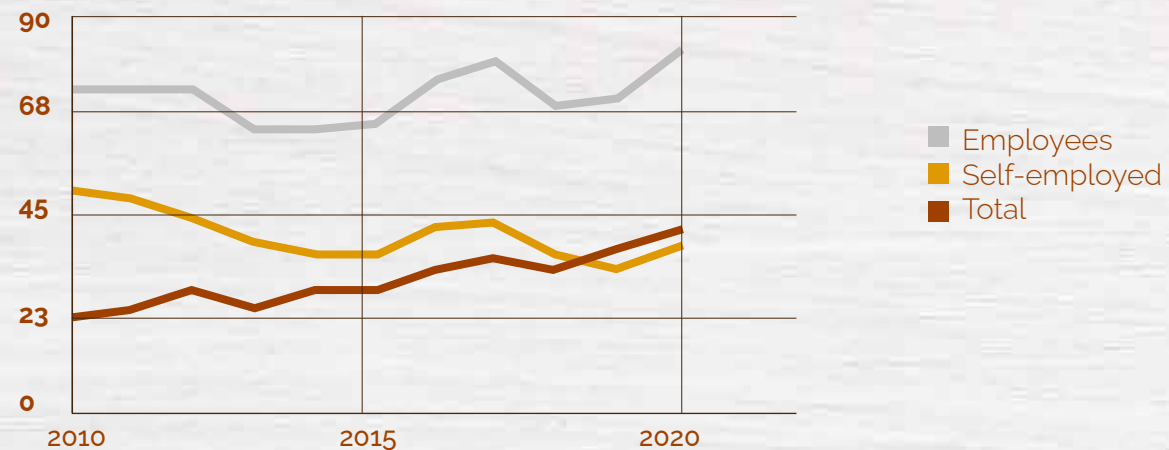
- Territory and agriculture
- Agricultural output
- Food and beverage industries
- Foreign trade and exports
- Sustainable agriculture





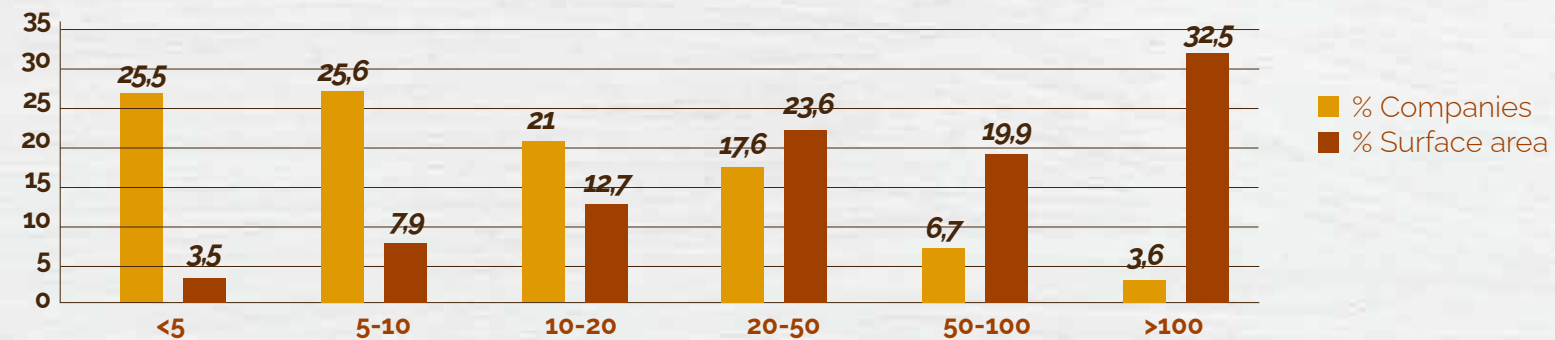
## Work and employment in Emilia-Romagna 2010-2020

(Source: 2020 Report)



## Distribution of agricultural holdings (%) and areas by size classes (Ha) in 2020

(Source: Elaborations of AGREA data, Emilia-Romagna Region - Directorate-General for Agriculture, Hunting and Fisheries)



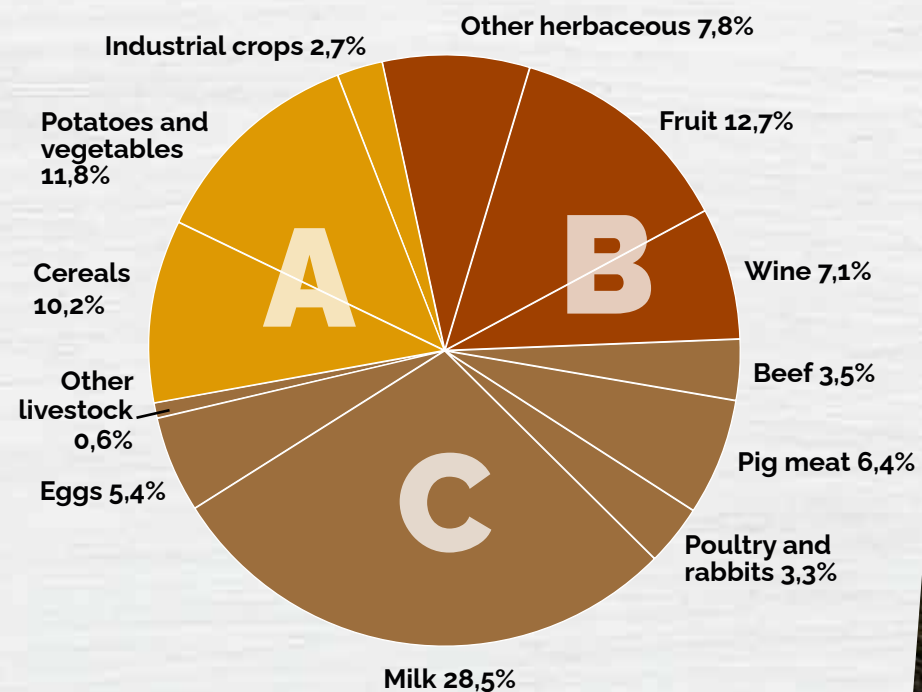


# Agricultural output by product group

(Source: 2020 Report)

## Continental and Mediterranean types of products

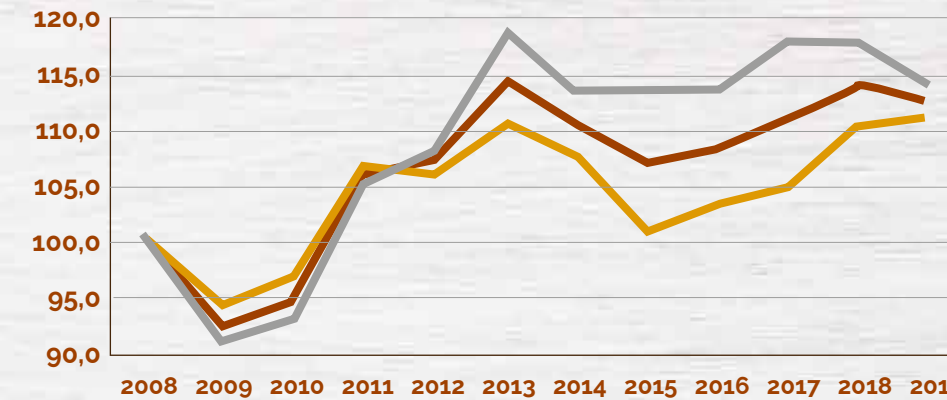
- A 24,7% cereals and industrial crops
- B 27,6% fruit and vegetables
- C 47,7% animal production



# Agriculture, forestry and fishing

(Source: Istat, regional economic accounts)

Emilia-Romagna: production, intermediate consumption and added value in agriculture, forestry and fishing - 2008 to 2019 (2008=100)



- Added Value
- Intermediate consumption at purchase prices
- Production

## EMILIA-ROMAGNA SUPPORT AND SECONDARY ACTIVITIES

The value of support and secondary activities as a percentage of regional production 20 % in 2019.

> Support activities

**793 million €**

*Mechanical outsourcing, primary processing of agricultural products, etc.*

> Secondary activities

**702 million €**

*Agritourism, renewable energies, care of parks and gardens, social farms, etc.*

Emilia-Romagna: agriculture, forestry and fishing 2016-2019 (thousands of euros)

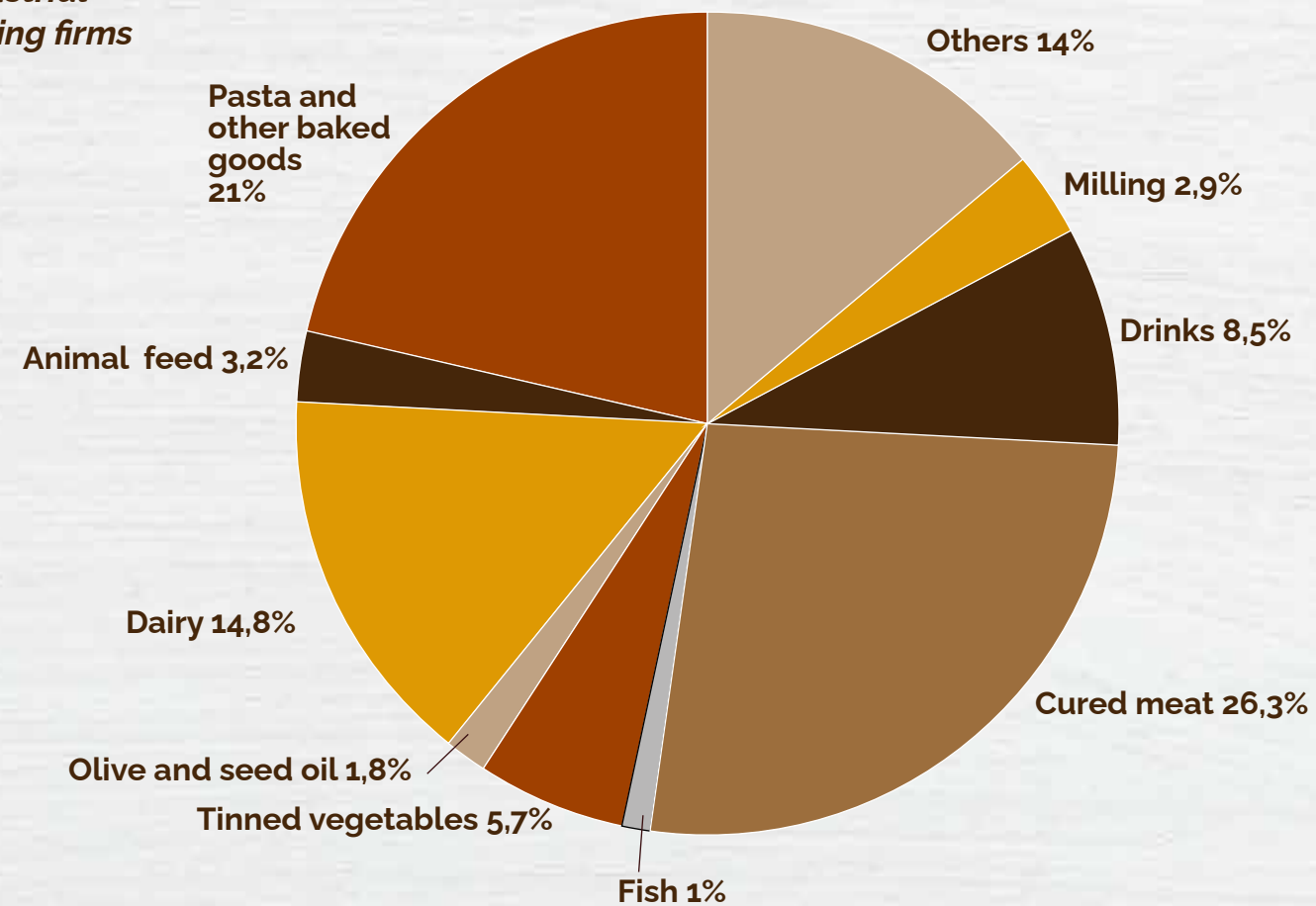
| Period                                      | 2016      | 2017      | 2018      | 2019      |
|---|-----------|-----------|-----------|-----------|
| Production                                  | 6.797.002 | 6.974.196 | 7.149.330 | 7.059.629 |
| Intermediate consumption at purchase prices | 3.274.616 | 3.320.261 | 3.493.789 | 3.523.536 |
| Added value                                 | 3.522.386 | 3.653.935 | 3.655.541 | 3.536.093 |



# Food and beverage industry data (2020)

## Structural data: firms and employment

Share of industrial food-producing firms by sector (%)



Food processing firms: 4.758

- 7,7% of food processing firms in Italy
- 11,3% of manufacturing firms in the region



# Agrifood chain

Agriculture, food and beverages industries and related sectors

## Employment level

Agrifood system: considering related sectors upwards and downwards.

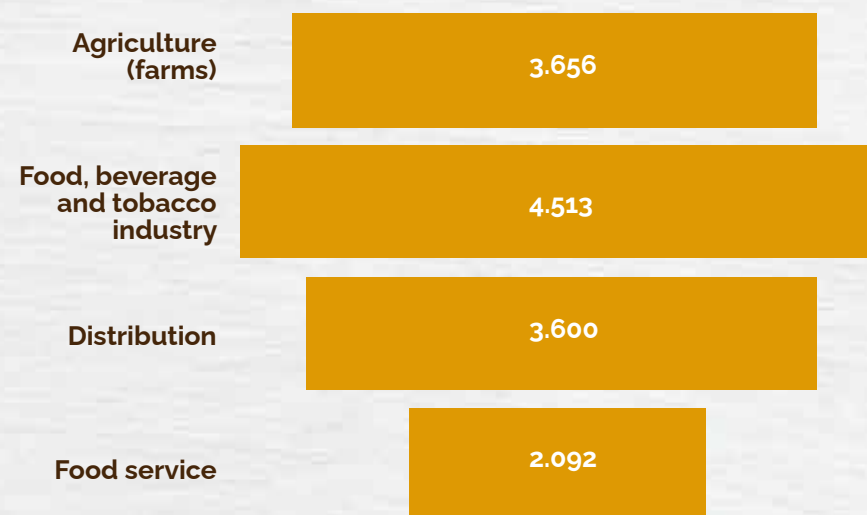
### Emilia-Romagna: Added value of the Agri-food Chain 2018

| Sector                           | Value added (million €) | Local units establishments (number)* |
|----------------------------------|-------------------------|--------------------------------------|
| Agriculture (farms)              | 3.656                   | (59.561)                             |
| Food industry, beverage, tobacco | 4.513                   | 5.119                                |
| Wholesale                        | 1.807                   | 6.949                                |
| Large distribution               | 1.418                   | 2.977                                |
| Specialized retail               | 375                     | 8.938                                |
| Catering                         | 2.092                   | 24.038                               |
| <b>Total Agri-food chain</b>     | <b>13.860</b>           | <b>107.582</b>                       |

(\*Source: Istat, Business Survey Structure)

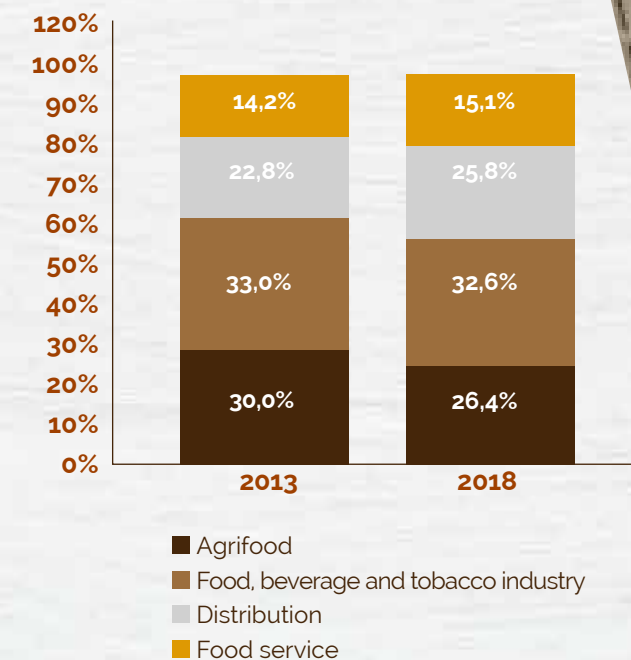
### Emilia-Romagna: value added produced by the components of the AA supply chain 2018 (million €)

(Source: Istat data processing)



### Emilia-Romagna: value added produced by AA supply chain components from 2013 and 2018 (%)

(Source: Istat data processing)





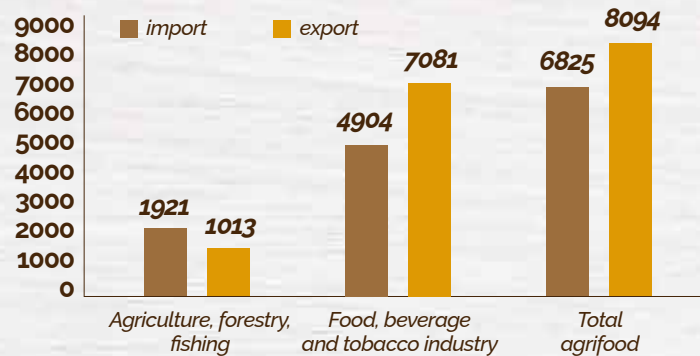
# Agrifood imports-exports

(Source: 2020 Report)



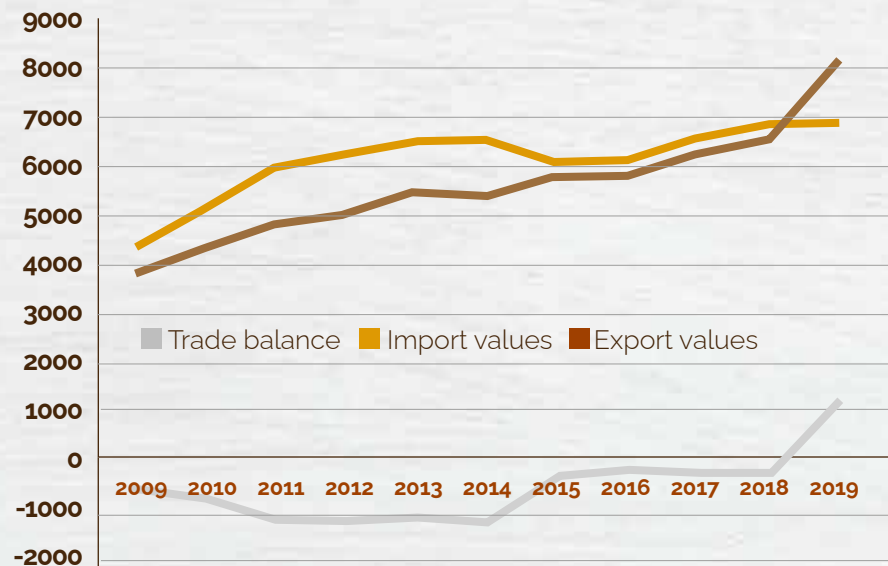
Foreign trade of agrofood products 2019 (million €)

## Emilia-Romagna



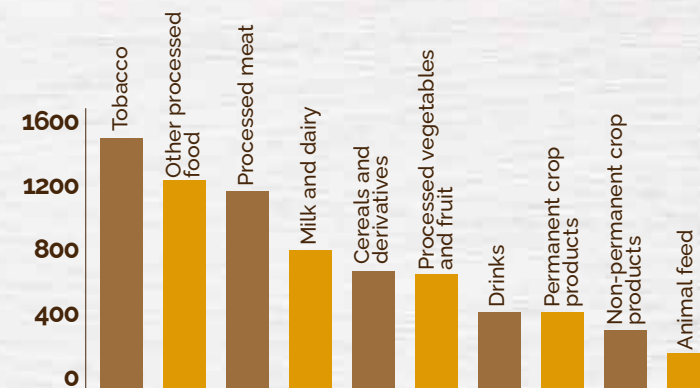
## Foreign trade in Emilia-Romagna

Agrifood trade years: Import, Export, Balance 2009-2019 (million €)

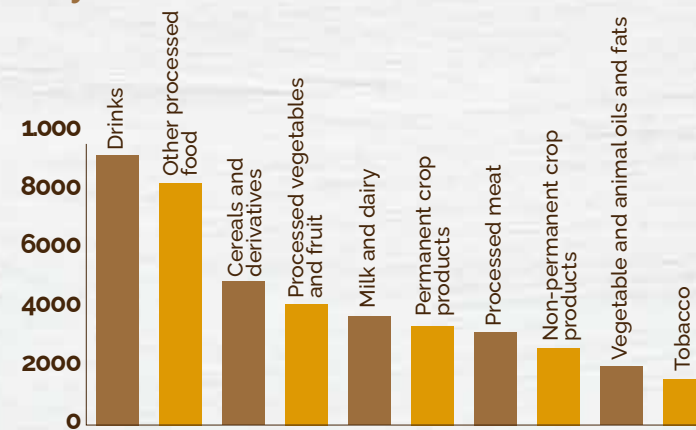


## Top 10 exported items in Emilia-Romagna and Italy (2020)

### Emilia-Romagna

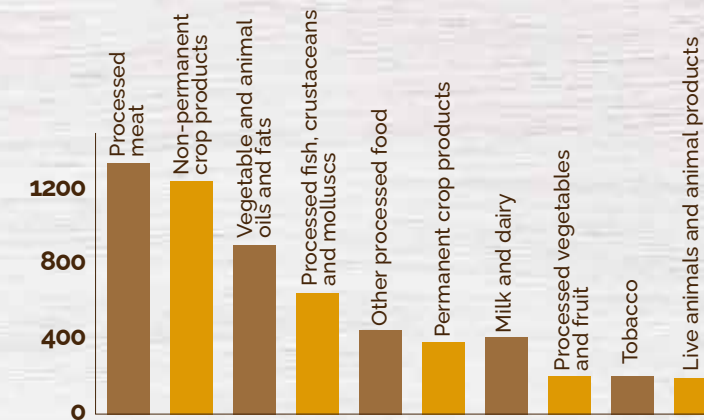


### Italy

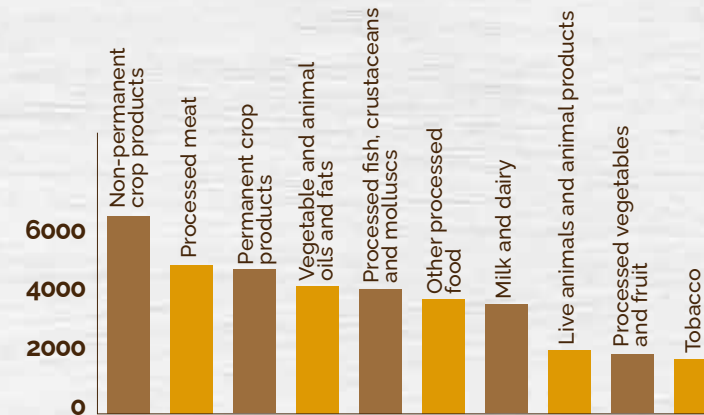


## Top 10 imported items in Emilia-Romagna and Italy (2020)

### Emilia-Romagna



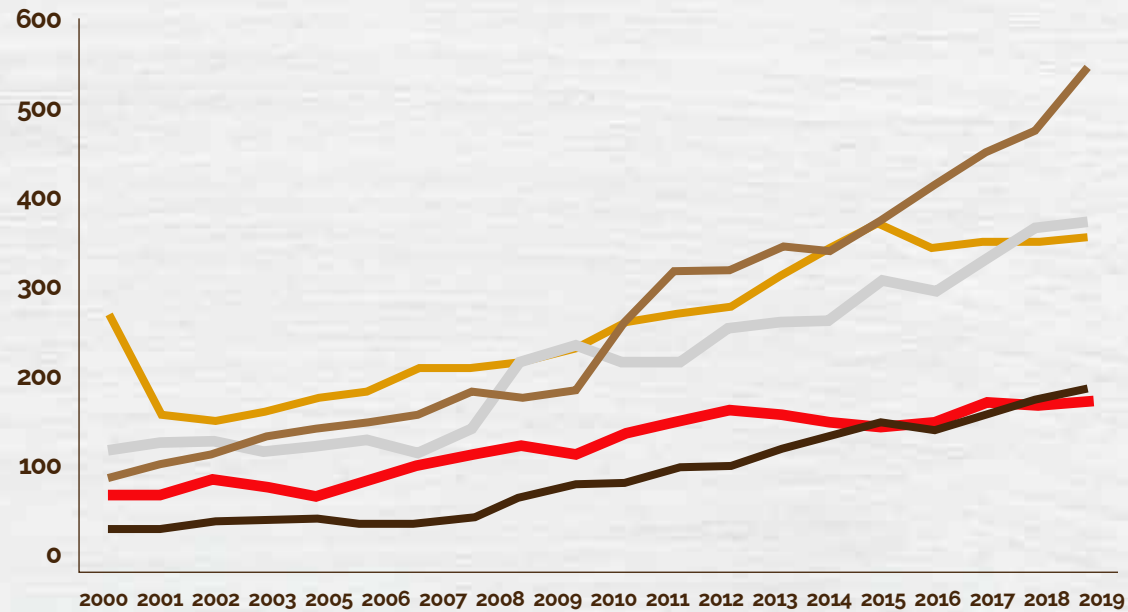
### Italy



## Trend of the top 5 products by export value 2000-2019 (million €)

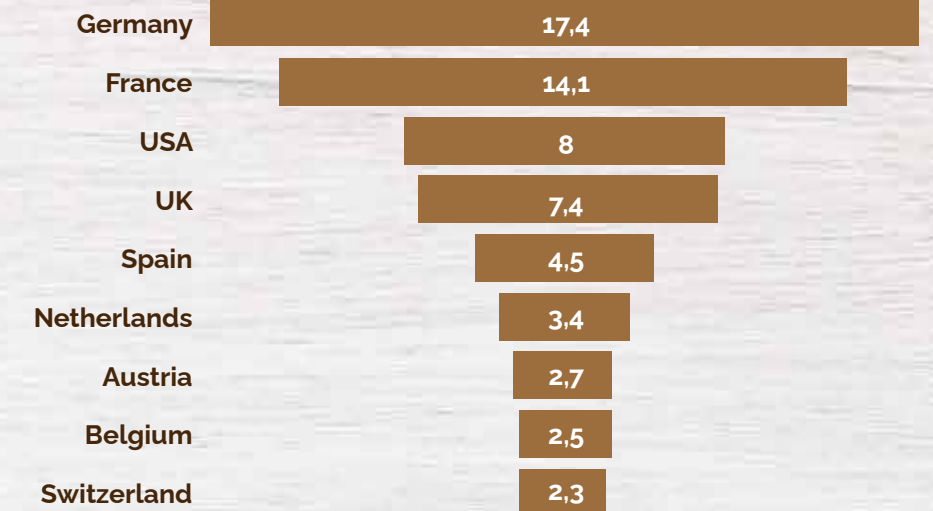
(Source: elaboration of Istat data)

- Dry edible pasta
- Cured hams
- Aged cheeses
- Packaged wines < 2l
- Peeled tomatoes and tomato pulps

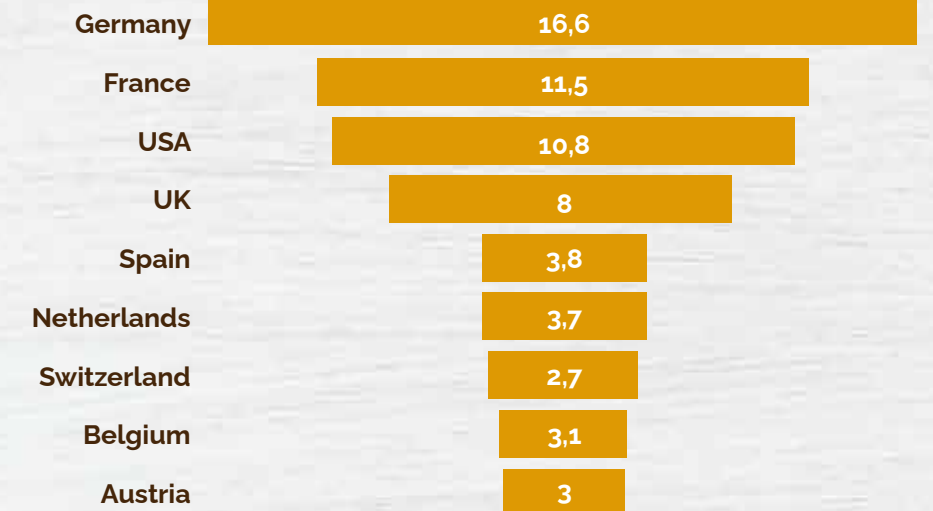


## Agrifood exports: Emilia Romagna and Italy by main destination countries

### Emilia-Romagna (%)



### Italy (%)





# Emilia-Romagna a leading agricultural region in Italy and Europe

## Sustainable agriculture:

- **PDO** (Protected Designation of Origin) and **PGI** (Protected Geographical Indication) products
- **Organic agriculture**
- **QC** (Controlled Quality) - Integrated production
- **Agritourist** structures
- **Food and Wine routes**
- **Educational farms** and **social agriculture**
- **Nature parks** and **reserves**

## PDO and PGI products

- Emilia-Romagna is the most representative region in Italy for quality agrifood products, both in terms of geographical indications (44 PDO and 312 PGI) and economic value.
- Emilia-Romagna has more than 40% of the turnover of Italian PDOs (Grana Padano is mainly in other regions); the total turnover for the best four PDO-PGI products (4.265 million €) is 55.4%.

## Top 10 PDO/PGI products in Italy (2019)

| PDO/PGI                      | Value (million €) |
|------------------------------|-------------------|
| Parmigiano Reggiano **       | 1.556             |
| Prosciutto di Parma**        | 721               |
| Mozzarella di Bufala Campana | 426               |
| Aceto balsamico di Modena**  | 383               |
| Gorgonzola                   | 368               |
| Prosciutto di San Daniele    | 313               |
| Mortadella Bologna**         | 296               |
| Pasta di Gragnano            | 247               |
| Bresaola della Valtellina    | 235               |
| Grana Padano*                | 1.562             |

\* production area: Emilia-Romagna and other regions

\*\* production area: Emilia-Romagna

## Number of PDO/PGI certifications (%)

(Source: Qualivita 2020)

|                        | PDO  | PGI  | Total |
|------------------------|------|------|-------|
| % Emilia-Romagna/Italy | 11,0 | 17,9 | 14,1  |
| % Italy/EU             | 27,6 | 18,6 | 22,7  |





# PDO and PGI products in Emilia-Romagna

# Organic production

(Source: 2020 Report)



## Agriculture that respects the environment:

- No GMs (genetically-modified organisms)
- Research and innovation to produce more and better, efficient use of natural resources
- Safety, reliability, and quality as the main axes of development policies

## Organic farming in Emilia-Romagna (2020) fast growth of farms and Ha

- **6.480** operators
- **5.559** farms
- **1.281** processing firms
- **179.866** hectares (16% of the regional UAA) (+102% vs 2014)





# Integrated production

(Source: 2020 Report)



## Farming production system for better water and soil management in the food chain, containing rules:

- for pest and weed control to reduce the use of pesticides;
- to reduce and optimize the use of fertilizers, according to the type of soil;
- manure treatment and disposal;
- for crop rotation, soil management irrigation technical advisory service including forecasting models based on weather conditions.

## Integrated production in Emilia-Romagna (2020)

(Production obtained under Integrated production Guidelines)

| Crops                              | Surface (Ha)  |
|------------------------------------|---------------|
| Fruit and vineyards                | 18.319        |
| Fodder crops                       | 12.302        |
| Vegetables and other annual crops  | 26.842        |
| Sugar beet, rice and protein crops | 11.317        |
| Arable farming                     | 27.637        |
| Olive trees                        | 156           |
| <b>Total Ha</b>                    | <b>96.572</b> |

## Impact of sustainable farming in Emilia-Romagna (2014-2022)

Outcomes of mid-term evaluations - September 2021

| Water quality   |
|---|
| Nitrogen fertilizers supply decreased (31.4% in organic farming).   |
| Most toxic pesticides decreased (32.4% in organic + integrated farming)   |
| <i>(Source: Assessment based on sample survey)</i>  |
| Soil erosion  |
| Soil conservation practices that reduce soil erosion applied on 107.402 ha (about 35% of the hilly and mountainous UAA) |
| Soil organic matter (SOM)   |
| In areas under agri-environmental commitments, only a slight increase in SOM is expected (on average 0,113 t/ha·y)      |
| Climate change mitigation   |
| Agro-climatic-environmental measures achieved results:  |
| Greenhouse gas emissions from agriculture and livestock decreased by 18,730 t CO <sub>2</sub> eq/y                      |
| Increase of carbon stored in soils and vegetation by 79,785 t CO <sub>2</sub> eq/y                                      |





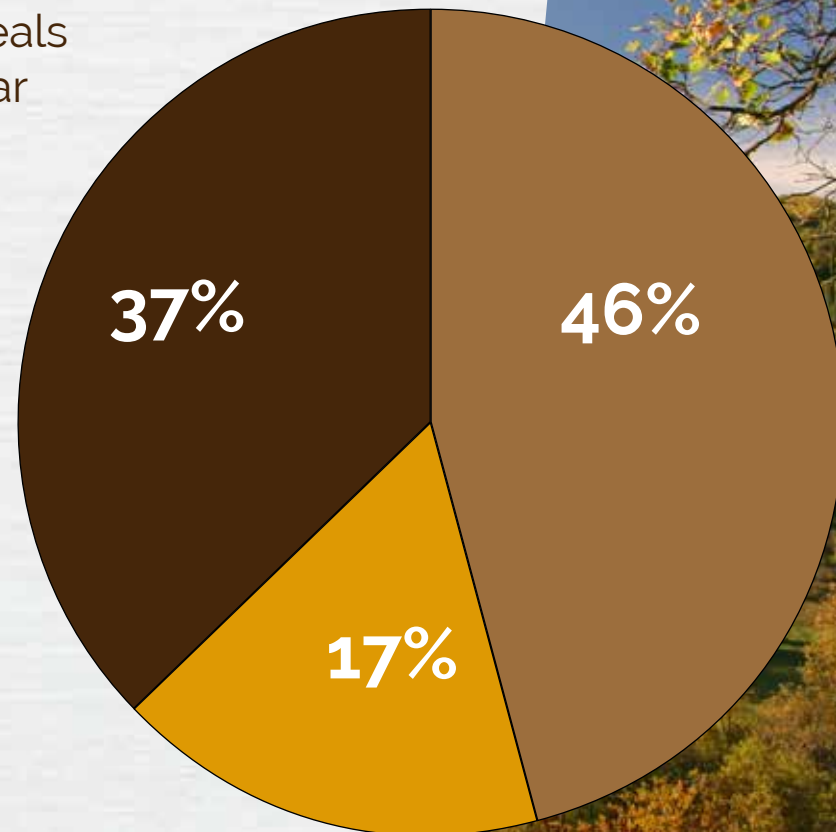
# Agritourist structures

**1.246 active agritourist**

- 10.500 beds
- 4,71 million meals served per year
- 300 active educational farms

**Total number of active by zone (2020)**

- Mountains
- Hills
- Plain



# The 30 PDO and PGI wines of Emilia-Romagna

- |  |   |
|--|---|
|  Bianco di Castelfranco Emilia <b>PGI</b>       |  Lambrusco di Sorbara <b>PDO</b>                 |
|  Bosco eliceo <b>PDO</b>                        |  Lambrusco Grasparossa di Castelvetro <b>PDO</b> |
|  Colli bolognesi <b>PDO</b>                     |  Lambrusco Salamino di Santa Croce <b>PDO</b>    |
|  Colli bolognesi classico Pignoletto <b>PDO</b> |  Modena / di Modena <b>PDO</b>                   |
|  Colli d'Imola <b>PDO</b>                       |  Ortrugo <b>PDO</b>                              |
|  Colli di Faenza <b>PDO</b>                     |  Pignoletto <b>PDO</b>                           |
|  Colli di Parma <b>PDO</b>                      |  Ravenna <b>PGI</b>                              |
|  Colli di Rimini <b>PDO</b>                     |  Reggiano <b>PDO</b>                             |
|  Colli di Scandiano e di Canossa <b>PDO</b>     |  Reno <b>PDO</b>                                 |
|  Colli piacentini <b>PDO</b>                   |  Romagna <b>PDO</b>                             |
|  Colli Romagna centrale <b>PDO</b>            |  Romagna Albana <b>PDO</b>                     |
|  Emilia / dell'Emilia <b>PGI</b>              |  Rubicone <b>PGI</b>                           |
|  Forlì <b>PGI</b>                             |  Sillaro / Bianco del Sillaro <b>PGI</b>       |
|  Fortana del Taro <b>PGI</b>                  |  Terre di Veleja <b>PGI</b>                    |
|  Gutturnio <b>PDO</b>                         |  Val Tidone <b>PGI</b>                         |





**Emilia-Romagna.  
Il futuro lo facciamo insieme.**

