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Macro-level analysis of food supply chain dynamics and diversity

National report – Italy

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ITALY

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1. General description of evolution of FSCs in Italy: the historical perspective

Italian lifestyle and food consumption are still strongly influenced by agriculture. The decline of economic and occupational relevance of the primary sector in Italy is quite a recent trend, as until the '50s the largest share of Italian population was rural.

Before modernisation the life in the countryside was deeply characterised by population pressure on the land, low incomes, small farm size, unemployment, which fed a strong migration flow.

The fascist regime (1921-1944) made intense use of communication to promote a rural view of society. In fact the regime, in order to give strength to its autarchic economic policy and to realise an efficient social control, needed to keep people in the countryside and limit the migration from the countryside to the town.

The economic take-off of the '50s strongly changed the Italian social structure and the spatial patterns. The migratory flow, until that time mainly overseas, started to be directed, within Italy, from the South to the North and from the mountains to the plains.

That occurrence affected quite deeply both agriculture and the agro-food system: large part of disadvantaged areas was abandoned; economic, industrial and urban development concentrated in the plains; agriculture and the agro-food system started a process of modernisation. The rapid growth of the number of urban consumers, aiming at having urban lifestyles, fostered the consolidation of big national food companies who replaced craft food with industrial food.

The process of modernisation in Italy, applied to the specificity of the conditions of Italian production systems, had original outcomes. Different local environmental, human and cultural resources, as well as geographical and historical backgrounds affected modernisation of Italian rural areas. In the wealthiest plains, CAP (*Common Agricultural Policy)* and technological innovation encouraged intensive paths of capital development such as maize production for dairy farming and beef production, glasshouses (especially in Liguria and more recently in Campania and Sicily), large-scale irrigated horticulture (Campania and Puglia). Lately, hilly areas have regained strength and competitiveness as their environmental conditions and their production system became more prepared to respond to the increased consumers' demand for quality and variety.

Considering the whole agro-food system, during that stage big food companies were the most important actor of the process. They strongly affected the introduction of new production techniques and imposed quality standards to their suppliers. They also benefited of sanitary and quality standards promoted by the EU, which have on the contrary penalised many traditional production systems.

The impact of the modernisation process has been strongly negative on all traditional production systems, based on local circuits of consumption. Milk and beef production have undergone a process of territorial concentration, while production systems in marginal areas collapsed. Many traditional products, not suitable to the strategies or the technology of the big companies, have disappeared.

In some industries, such as fresh milk, beef and canned tomatoes, that process allowed the development of modern production techniques and a tendency to de-territorialisation and standardisation. In other industries, such as wine and cheese, a strong regional product identity (as in the case of Parma ham or Parmigiano-Reggiano cheese) determined standardisation and allowed the emergence of localised production systems, based on small-scale production. In fact, a rigid land market and a high population density didn't allow a relevant growth in farm size, so that peasant families exploited the possibility of integrating their incomes through part-time farming and pluriactivity, and to exploit community relations to pursue integration through a large set of co-operative arrangements.

Nevertheless, the availability of modern production techniques and the rapidly growing markets generated a pressure over product quality standards, submitted to progressive erosion in the attempt to reduce costs and increase productivity.

For Italy it is possible to speak of an early crisis of modernisation, conceived in terms of scale enlargement and quality standardisation. We can consider three events as turning points of this evolution:

- The scandal of hormones into the baby food (hormones in animal production are forbidden in Europe, but a large black market exists);
- The scandal of wine doctored with methanol, which killed several people both in Italy and abroad and strongly weakened the reputation of Italian wine;
- The promotion, by environmentalist organisations, of a referendum over the use of pesticides in agriculture.

Together with minor ones, they have contributed to the change of consumers' attitudes and policy priorities during the '90s. Since them, quality and environment have become the keys for the discourse around public and private agriculture, as well as food policies.

In the new phase, which we call *diversification*, food is associated to an increasing bundle of concepts: health, culture, environment, quality of life, tradition, pleasure. Food companies respond to the changes with product innovation and more targeted communication strategies, and retailers, whose role grows in this stage, respond by activating targeted quality policies.

In Italy, the leaders of the new trend are not the same actors and the same regions that led the preceding phase. Consumption trends in quality food open and consolidate new opportunities for those areas that missed modernisation, but now may offer added value related to local and typical production.

From this point of view the belated and incomplete modernisation of Italian agriculture, which was for a long time considered a weakness in comparison with other European countries (France, The Netherlands), can be interpreted as the first step for an *anticipated diversification*. Nowadays that turned to be an opportunity as it provides the resources to supply the emerging markets of food and leisure specialties.

2. General configuration of FSCs in Italy

2.1 The agricultural sector

Over the last few years, agriculture's share of the economy in Italy became more similar to the one of other countries in North-Centre Europe. In 2001, agriculture's share of total national AV amounted to about 2.7%. In real terms (at 1995 prices), agriculture's contribution to total national AV dropped from 3.3% to about 3.1% between 1991 and 2001.

Large differences within the country, however, remain: in the North-Centre, agriculture accounts for only 2.3% of total AV at basic prices and 4.2% of employment (measured in standard work units), while in the South these values rise to 5% and 10.2% respectively. The whole agriculture system in the South is struggling in a state of crisis: old established structural problems affect the sector's competitiveness, policy assigns far lower levels of subsidy to Mediterranean crops than to continental crops, and does not take into account the area's specific needs.

The following table shows the distribution of the added value within the agro-food system:

Added value breakdown in agro-food chains (mio euro, 2001)	
Agricolture	30.754
Inputs for agriculture	15.017
Commerce and distribution	63.586
Food processing industry	23.063
Catering	29.773

The peculiarity of Italian agriculture is frequently associated to:

- Large number of farms (almost 2.600 in 2000), which implies: a) a strong political weight of farmers' organisations; b) a need for co-ordination of production and distribution processes;
- Intensity: while the average size (5,9 ha) is one of the smallest in UE, the rate labour/land is approximately 0,08 labour units per ha (about two times the average ratio in EU); Italian farmers have developed survival strategies to maximise the added value per unit of land;
- Strong dualism between wealthy areas (mainly located in the plains) and marginal areas (mainly located on the mountains).

Moreover, Italian agriculture is characterised by a high territorial specialisation. We could single out five main types of agricultural environments:

- Highly fertile plains (mainly concentrated in the North of Italy and around Rome) where cereals and animal productions prevail (the Po Valley has the highest added value per agricultural labour unit in Europe);
- Irrigated plains specialised in production of fruit and vegetables (Trentino and Romagna in the North, Puglia and Campania in the South);
- Hilly regions with a strong specialisation in vines, olive trees, orchards (predominantly situated in central and southern Italy, but in the case of vine hills and orchards, in the North, too);

- Hilly areas and dry plains specialised in grain production (situated in central and southern Italy) strongly dependent on Community intervention;
- Mountainous and upland areas with limited production potential, inclined to be neglected.

The high number of enterprises shows that in Italy, perhaps more than elsewhere in the EU, land management is often a completely different matter from participation in the real economic dynamics of the primary activity. Italian farms be divided in two main patterns:

- Enterprises that, although organised in different ways, are integrated into international, national and local markets;
- Productive systems whose links with the agro-food chains have weakened over time, but which have become significant on the social point of view, as well as in terms of land management.

2.2 The food and drink manufacturing industry

The sector is still characterised by a multitude of medium-scale firms, but the big companies hold almost the totality of the market. As matter of fact, food supplies chains have undergone an enormous process of concentration, although this process is allowed by a strong specialisation of the smaller firms.

In 2001 the output in the food and drinks industry increased by 0,5% compared to 2000, but showed a slowdown in growth, which run parallel with a certain immobility in national food consumption. Total added value at basic prices amounted to almost 23,100 million euros, a 5.2% increase in value over 2000. The food industry contributed to around 8.9% of the AV from the whole industry (considered in the narrow sense of the manufacturing and mining industries) and around 75% of the AV from agriculture.

According to a survey by *Infocamere*, there were around 75000 agri-food processing firms operating in Italy in 2000, 56% of which employing fewer than 2 people.

Agri-food firms are still unevenly distributed over the country and there are considerable structural and technological differences among them: 72% of all employees and 75% of AV at basic prices from the Italian food industry are concentrated in the North-Centre (Inea, 2002).

With regard to the outputs, around 70% of total agri-food output is represented by meat (17%), followed by milk and dairy produce (14%), drinks (15%), bread, pasta, confectionery and other foodstuffs (23%). The sectors in which Italians give the major contribution are milk and dairy produce and processed fruit and vegetables, which each accounts for over 13% of the EU total output.

2.3 The retailers

In the food sector a survey counted 193.000 retail enterprises selling food as their main activity at December 2001; they represented 26,6% of the national total, falling by 1,6% from 2000. About 12,4% of these enterprises are specialised in fruit and vegetable, 20,8% in meat, 4,1% in bread and confectionery, 7% in drinks and 13% in other foods. Food shops not specialised in any category of food rose to 40,1% of the total, increasing by 1% from 2000. That confirmed the decrease of the tendency towards specialisation in food categories.

The survey of enterprises selling food as a secondary activity showed the existence of 2.000 farms and forestry business enterprises, 16.300 food industries and 24.000 restaurant and hotels, representing together 27% of the national total number of enterprises with secondary activities.

As in the other European countries, also in Italy the evolution of the retail sector sees the increasing importance of large-scale retail enterprises (supermarkets), with respect to the minor role of the small, traditional food shops. In 2001, the increase was respectively of +4,5% and +1,2% (Inea, 2002). However, Italian supermarkets chains are quite peculiar in terms of strategies and, consequently, of effects on consumers' behaviour. Most of them have given big importance in their marketing strategies to the defence of quality (traceability systems, information, private labels) and to the enhancement of typical and traditional characteristics. those policies gave important contribution to the growth of consumers' knowledge and awareness and, more generally, to change in the organisation of the agro-food system with respect to those aspects.

In spite of the dominant role of supermarkets, the new trends in consumers' attitudes open room for new circuits, tailored to small quantities and high quality, and allowing a more efficient communication between farmers and consumers. Groups of buyers, farmers' markets, thematic routes, gastronomic itineraries are among them. Several types of actors participate to the construction of these channels, such as consumers' associations, environmental association, municipalities, local tourist offices, etc. (for instance *Arcigola Slow Food* has deeply modified the concept of "valorisation"). In some cases, new circuits are built on old models of interaction (urban people combining a tour in the countryside to buy food from producers).

2.4 The areas of actual or potential dynamism and change

Recent trends in agriculture and agro-food system in Italy are based on rural tourism as well as quality products. The weak points in terms of agriculture modernisation are today changing in opportunities for rural economy: they saved diversity in local culture and products, allowing all over the country the conservation of typical and traditional products.

Another important trend is represented by the growth of organic farming, a trend involving the consumption as well as the production sector.

2.4.1 Typical products

Italy is one of the most important producers of "typical products" in the UE, represented by a quite large group of products whose commonality is to be linked to specific localities. Besides PDO (*Protected Designation of Origin*) and PGI (*Protected Geographical Indication*), it is possible to consider traditional products, which are item for consumption traditionally produced and consumed in specific localities, some of them in danger of extinction. Typical products are considered the key for a largely agreed strategy of the Italian agro-food industry.

There are about 120 products registered as PDO or PGI. They include 30 cheeses (about 60% of milk produced in Italy is processed into regionally labelled cheeses), 25 olive oils, 29 fruit or vegetables and 25 cold meats.

The registered products include:

- The so-called niche commodities, which are produced on a small scale and in very limited areas of the country, where the interaction with the environment confers particular organoleptic qualities to the product;
- Commodities produced on a large scale for sale on national and international markets (so far, 40% of this market is covered by three products - *Parmigiano Reggiano*, *Grana Padano* and *Prosciutto di Parma* - and the first 10 products cover 70%).

About half of Italy's PDO and PGI products come from the North, not because the agri-food heritage is richer, as in that area there is a rooted tradition of associations and consortia setting up, which enabled producers to make the most of their products.

In addition to PDO and PGI products, there is the much greater list of "traditional agri-food products", recognised by a national decree (n.350, 1999). This list represents a potential for the Italian food economy, a basis for a strategy of development based on high quality localised production. The national register updated to 2001 lists over 3,000 different commodities; half of these are fresh or processed crop products, pasta and bakery products, while processed meats and cheeses amount together to around one thousand different specialities.

The contribution of registered food to Italy's agri-food economy is far from marginal: it is estimated (wine excluded) about 7.5% of the agricultural added value (Ismea 2000), with a turnover of over 6,500 billion lire of production and 12,000 billion lire of consumption.

The consumption of typical product is narrowly linked to tourism, in particular to the eno-gastronomic tourism circuit, which in Italy is obtaining an increasing success (wine/olive oil/cheese routes), and to the more general re-discovery of the values of rurality, within a typical urban, middle-class trend.

2.4.2 Organic products

Organic farming in Italy is getting out a significant role. At the moment a large part of organic cultivated land of EU is concentrated in Italy, where 1.2 millions hectares of land are used for organic farming or under conversion. Italy in fact manages 27.5% of total organic UAA in EU. The surface cultivated is about 7% of the total agricultural surface of the country, and it is mainly concentrated in the South and in the Centre. Fodder and cereals represent 72.5% of Italian organic crops. Among tree crops, olives and vines are grown on 12% of organic UAA, while fruit and vegetables account for 7.7%.

According to the provisional Ministry for Agricultural and Forestry Policies data updated on December 2001, Italian organic sector accounted 60.509 enterprises (including 56.440 farms, 3.947 processing and trade companies, and 122 importers), representing the 2% of the total Italian enterprises. There is a steady growth in processing organic food (40% more firms than the preceding year), demonstrating that the added value of organic business is in the processing more than in raw material production.

According to the databank of the Ministry for Agricultural and Forestry Policies (BIOL), 67% of organic operators are found in the South of Italy, 12% in the Centre and 21% in the North. The distribution of organic production in Italy is such that while most organic farms are found in the South (70%), most processing enterprises and importers are found in the North (48% and 90% respectively), confirming the fact that the South is the most important producer of organic commodities, but is lacking of an efficient processing industry.

According to a 2001 survey by the *Coldiretti* Farmers Association and the Labour Ministry, the identikit of an organic farm is the following: average UAA of 21 hectares; organic products representing 80% of farm production (in 32.8% of cases with rented land); machinery and vehicles for an average total of 116 HP per farm, with machinery also frequently hired from outside sources; most of the labour on the farm supplied by family members, with recourse to temporary workers in 46% of cases; average turnover per farm of 27.888 euro. Moreover, 6.3% of organic farms offer farm tourism services and also process their own organic products.

One third of all organic food sales in Italy are made through specialist retailers. Only one-forth to one-third is distributed through multiple outlet retailers. There are about 800 specialist outlets in Italy that sell organic food. The vast majority are in northern Italy. Over 300 supermarkets and small self-service stores sell organic products. *Coop Italia*, *Conad*, and *Esselunga* are the three largest supermarket chains selling organic products; all developed a special organic food section in their stores (Miele, 2001).

The growth of consumption (about 1177 mio euro in 2001) of organic products is faster than internal organic sales volume, as demonstrated by an outstanding growth of imports.

3. Overview of the regulatory and policy environment and institutional setting in Italy

3.1 Policy environment

While up to the 60s the Italian Government, though not having a precise and unique agricultural and rural development strategy, still held a role of primary importance in designing policy interventions for the agricultural sector and rural areas, from the 70s on the central Government lost power with the growth of both the power of EEC and the Regional Administrations.

Italy's participation to EEC didn't help to create a precise agricultural and rural policy, because since the beginning (50s and 60s) attention was paid to the ongoing national industrialisation process and to the access to EEC members' rich markets. The most important national interventions in that period were focused on supporting small family farms, facilitating access to land, and in the 70s on sustaining the modernisation process for some agricultural sectors.

In the 80's national authorities, and particularly the Ministry of Agriculture, played an important role only in defending national interests within EU negotiations and CMO (Common Market Organisations) management, and in occasion of big sanitary scandals or threats (such as BSE, together with the Ministry of Health).

During the '90s the general process of diversification of agriculture, the growth of the rural development pattern and the process of policy territorialisation, made the role of Regional governments and of the local administrative levels more and more important. That means that there is a certain level of diversification of the strategies.

A fast comparative analysis of the Rural Regional Development Plans shows a common framework, based on three strategic axes:

- Improving competitiveness of farms, where quality is a major objective;
- Improving the agro-environment, where a big share of the resources is destined to integrated and organic farming and to forestry measures;

- Improving the quality of life in rural areas, where rural tourism and rural infrastructures are the most common targets.

As a result, also thanks to the growing attention to the environment and landscape, and to the need of keeping traditions and cultures, there is a growing demand from the lower levels (Municipalities, Mountainous Municipalities Associated, Provinces, Regional Administrations) of redefining competencies and degree of autonomy between different territorial levels, coupled to the request for new policy tools.

A recent national Law (legislative decree n.228 issued on 18th May 2001 and entitled "Orientation and modernization of the agricultural sector") which - following the steps made by France in 1999 - introduces substantial modifications to the general normative framework of agricultural activities and producers organisations, trying to include all the "multifunctional" dimensions of agricultural activities according to society's needs. The law:

- Changes the definition of agriculture, widening the typologies of activities that arms are allowed to carry out ("diversification" of farm activities); agri-tourist activity is now fully recognised as agricultural activity;
- Stresses the importance of enhancing quality products (organic foods, traditional and typical foods);
- Pays attention to food safety matters (traceability, information to consumers, GMOs);
- Makes an effort to simplify the bureaucratic-administrative procedures;
- Takes into account the environmental dimension of agricultural processes;
- Reinforces producers' associations and inter-professional bodies;
- Creates new policy tools to increase the autonomy of local public institutions (Quality Agro-Food Districts, Rural Districts, contracts between Local public institutions and farmers).

3.2 Institutional setting

Institutional setting in Italy is strongly influenced by both localization and broadening of agricultural scope.

In a context strongly concerned by globalisation processes, localization through intensified interaction and cooperation is perceived as a viable strategy of defence. It is facilitated by the introduction of administrative and political devolution, and bottom-up approaches allow the involvement of new actors and the growth of their power vis a vis the institutions.

The increasing attention to the links between agriculture and other fields of activity such as environment, health and food production have progressively broadened the policy network affecting decisions in agricultural policy. Consumers and other social organisations (environmental associations, animalists) are now increasingly influential.

The following are most relevant actors of the Italian agricultural policy network.

3.2.1 The Ministry of Agriculture and Forestry

In the process of increasing political and decisional power by the executive branch, the political role of the Ministry of Agriculture and Forestry grown during the '90s because of the institutional responsibilities in the EU context (political representation, CAP implementation) and in the domestic arena (direct negotiation with the agricultural syndicates - green tables), besides the need of regulation of the relations between the enterprises' system and society (consumers) and financial constraints. In the latter context, the ministry plays an important role in debating and dealing with important issues at national level (as food quality and safety, GMOs, agriculture-rurality), interacting with the representatives of the enterprises' system and the interest groups of society (consumers, environmentalists, etc.).

3.2.2 Other Ministries

Other Ministries take part to the policies network. Among them the Ministry of Environment and the Ministry of Health.

During the '90s, the role of the Ministry of Health became more significant in defining new rules in food production and distribution aimed to guarantee food safety (implementing EU regulations but also under the pressure of numerous food crises (hormones in baby food, methanol wine, BSE, GMOs, dioxin residues). In that activity it sometimes conflicts with the Ministry of Environment (i.e. for GMOs question).

In spite of the limits to its competencies derived from the process of devolution (in particular about territory planning), the Ministry of Environment plays an important role in several matters significant to the development of rural areas and consequently also of FSCs: management of water, pollution, waste, protected areas, hunting, biodiversity, GMOs, conservation of sites. Despite the growth of environmental consciousness, its initiatives frequently encounter resistance by economic lobbies and cause intense political debates.

3.2.3 The regional governments

The important role of regional governments (distinct policy-making activity, control on national government activity, autonomous position in the Community arena) has been the result of the administrative devolution process implemented during the '90s (the final act of a growing conflict with the Ministry). The latter strengthened the effects of the evolution of CAP (increasing regionalisation also in the market and rural development policies, in addition to structural policy).

At the moment, regional governments have competencies on: formulation and implementation of regional policy in relation to economic development, social affairs, territorial planning, and in particular to agriculture, agri-tourism activity, forests, fishing, environment, wildlife and regional protected areas, tourism, culture, education and professional training. They consequently play a central role in the policy-making process at local level, also through the dialogue and negotiation with the representatives of economic and social actors.

3.2.4 The local public bodies

Through the process of devolution the local public bodies (Provinces, Municipalities, other public agencies) have gained new competencies and responsibilities in planning and administration of local development. They have also acquired a new role in creating the local system of governance together with the enterprises' system and the representatives of social actors. They play a significant role in promoting local productions and short circuits of distribution.

3.2.5 Farmers' unions

There are three main organisations, which in the past represented very different typologies of farms, interests, social and ideological positions: *Coldiretti*, until the middle of the '90s narrowly linked to the centre-catholic party and to the big economic-political power of Federconsorzi, and representing the small family farms; *Confagricoltura*, linked to the Right and representing the large capitalistic farms; *Confederazione Italiana Agricoltori*, linked to the Left and representing farm labourers and small farms.

Nowadays there are not many differences in their ideological positions and policy plans and their requests are often very similar. After the crisis of the '80s-'90s, in the context of the recent changes of the Italian institutional-political system, they assumed again an important role, as main interlocutors of the Government/regional governments in the formulation of the national/regional policies; moreover, they were directly involved in the implementation of the new CAP. Besides those activities, they play a primary role in promoting the values of rurality and the multifunctional role of agriculture (i.e. by fostering a narrower link between producers and consumers around quality or promoting rural tourism through their agritourist enterprises' associations).

3.2.6 The environmentalist organisations

There are some big and powerful associations (*WWF*, *Legambiente*, *Italia Nostra, Lipu*), operating on the whole national territory through an articulated organisation. In the '90s, in a scenery of growing awareness of the environmental and health problems related to modern production models, they assumed an increasingly important function of lobbying in the national and regional policies for environment and, more recently, for rural development.

More recently, the previous Minister of Agriculture, belonging to the Green Party, created a particularly favourable context in this direction. Besides the participation in the debate and the policy-making process at national level, more locally a significant contribution is made by minor groups interested and actively engaged in the sustainable management of the local environmental-rural resources and generally more integrated in the local governance system.

3.2.7 The consumers' organisations

During the '90s, together with (as cause but also, at the same time, as effect) the development of a regulation system to face the food quality and safety problems determined by the current production model, some consumers' organisations have become important pressure groups, lobbying for the defence of the consumers' concerns, especially in the field of food safety and market transparency.

An atypical consumers' association is *Slow Food*, born in Italy in the middle of the '80s, and then grown very fast up to become an international organisation (*Slow Food International* was born in Paris in 1989); nowadays it is a referent-point for the promotion of "taste" culture and food quality in Italy (see repertoire).

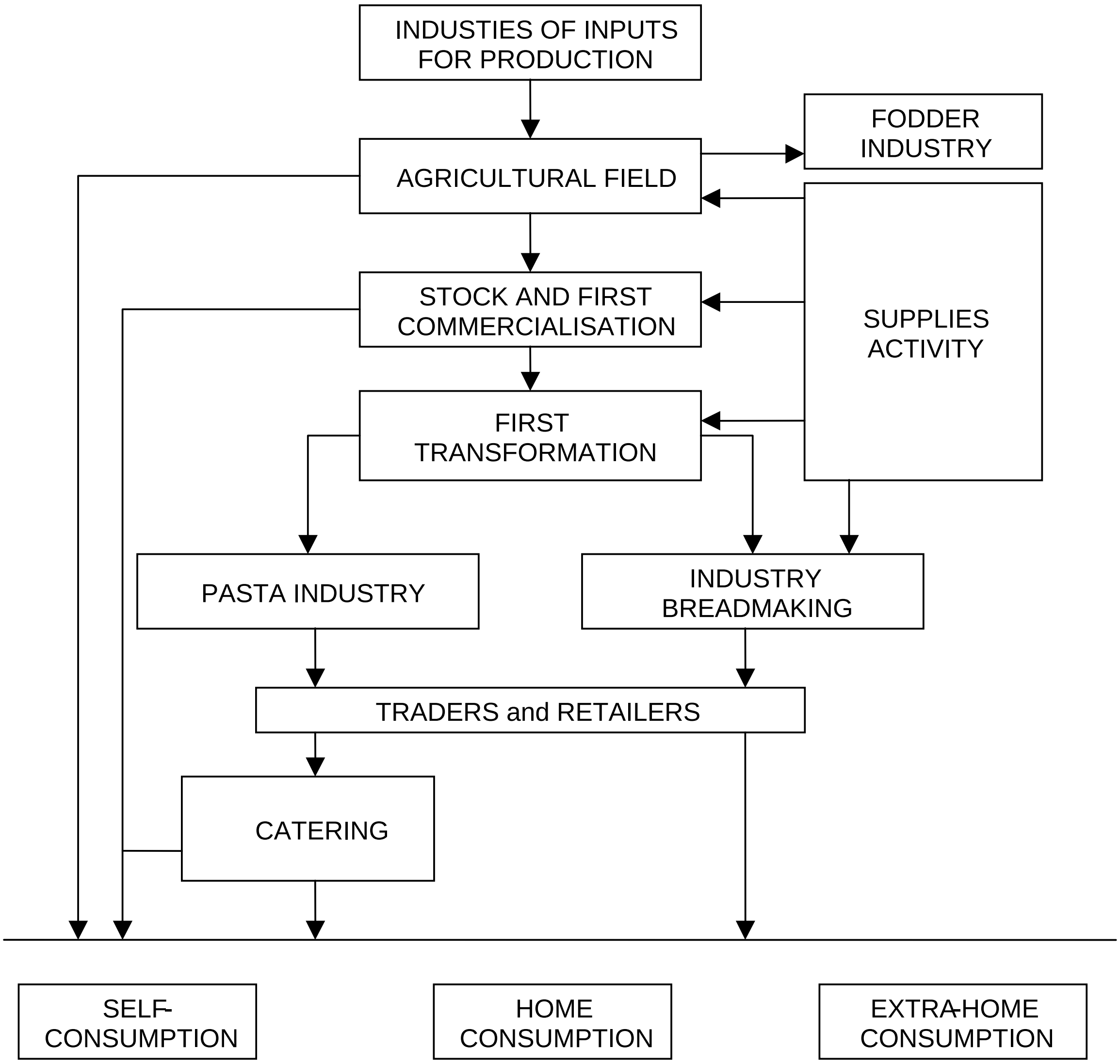
3.2.8 Other local organisations

At local level other organisations can take part to the construction of policies by interacting with public administrations. They are institutional or informal organisations variously engaged in initiatives of promotion of the local socio-economic development (i.e. Leader LAG, the various associations/consortia aimed to valorise specific local resources).

4. Sector by sector summary of FSCs in Italy

CEREALS

4.1. *Diagram showing the current structure of the sector*



Cereals play an important role in the Italian agriculture. The Italian surface cultivated with cereals is more than 4 million hectares (32% of the UAA). The 56% of that is concentrated in the North-Centre, while 44% is distributed in the South and in the islands (MiPAF, 2002).

Maize is the cereal of greatest interest for Italian agriculture, because of its elevated productive potentiality and its high nourishing value. According to the MiPAF data (2002), in 2000 the volume employed (i.e. excluding exports and including imports), was around 10,3 million tons of grains. Approximately 15% of that was reused in the breeding production, in the widest part (99%) for cattle feed stuffs. The main buyers of maize are fodder firms, which absorb 90% of the total.

Hard wheat is disappearing from North Italy, but maintains beyond one and half million hectares (1.664.195 in 2001) located in central and southern Italy. Its location and competitiveness vis à vis other cereals is related to the special premium granted by the Common Agricultural Policy for traditional production areas. This cereal, that supplies raw material to the pasta industry, covers a primary interest in our country.

The national surface cropped with wheat has drastically lowered in the last years, so that in 2001 was 625.177 hectares. Italy is the greatest wheat importer of the world with an annual average of approximately 8 million tons (5,5 of normal wheat and 1,5 of hard wheat): the imported flow covers 65% of the national need. Approximately 150 pasta factories are forced to rely on imports for about 25% of their input; the import regards mainly Canadian and American wheat.

Italy is also the main producer of rice (220.000 hectares in 2000) in the EU, but also minor cereals like oat, sorgo and rye are cultivated. In the last years a new interest for spelt has grown, because of its remarkable ecological value, above all in organic farming.
In terms of value, gross product value amounted in 2002 to 5,556 mio euro (source: Inea, 2003). Processed cereals are one of the most important sector within the agro-food industry, with about 3,350 mio euro turnover of which 2652 mio euro are exports.

4.2 Description of institutions, organisational forms and governance

Co-operatives and consortia manage approximately 40% of the cereals' supply. The most important organisations involved in the cereals chain are:

- UIAPROF (*Unione Italiana Associazioni produttori di Frumento e cerali minori*): it was born in 1980 supported by CIA (*Confederazione Italiana Agricoltori*); it holds 19 Associations in 14 Italian Regions (a total of 45.000 producers). The goals of the Union are to coordinate and represent its members and to operate producers' associations in the cereals' sector.
- ASSINCER (*Associazione interprofessionale cerealicola*): it was born with the task of supporting the development of the national cereals' sector, and to ensure to all the subjects involved in the supply chain a point of reference for the protection of their interests.
- ITALMOPA (*Associazione Industriali Mugnai e Pastai d'Italia*): this is a professional association that in Italy represents the grist industry.
- UNIPI (*Unione degli Industriali pastai Italiani*): this is the professional association of the Italian *pasta* industry.

4.3 Areas of the sector that exhibit dynamism in terms of being sustainable or alternative

Wheat is the product showing the greatest potential for developing **alternatives to the industrial production**. Most of its potential is related to the possibility of alternative circuits development in the processing sector. There is a big potential to improve high quality in this sector and to fetch a high premium price, as the incidence of the price of bread, pasta and other processed products on family incomes is very low.

The market of organic cereals products is increasing. According to Nielsen data (2003), in volume terms the consumption of these organic products is about 2000 tons, and in value terms, it means 6,6 million of euros. The greater spread is in the regions of the **North-Centre** (more than 70% of the market is concentrated in the North), while in the South consumption still is little, because in the South there is a minor presence of supermarkets, and so, these kind of products are not always available.

In the **organic farms of the South**, wheat is currently the most important cultivation, besides hard wheat, whose development is constrained by a lack of processing facilities, and barley, which particularly to the southern environment, because the brevity of its biological cycle allows to bypass water shortage and salinity. In these areas organic farmers also produce minor cereals, such as oat and spelt, and are oriented towards quality production. Spelt is particularly suitable for the valorisation of marginal areas, so that some initiatives have raised consumers' awareness (in Tuscany Garfagnana spelt has obtained Protected Geographical indication) and its market is increasing.

Pastas: **special pastas** are the main innovation of the sector. Organic pasta is generally sold up to about 30-40% premium price. The special pasta has a market share of 0.3%, while the wholesome pasta (with wholesome flour) represents 0.7% of the market. Also a high number of handmade pasta brands are blossoming out, distinguishing themselves by geographical origin, method of production, special shapes and special flavours (mushrooms, spinaches, tomato).

Bread: there are several initiatives, often supported by local administrations, to revitalize traditional and handmade bread, so that Italy can benefit of a huge variety of bread types. These initiatives bring together farmers' associations, small processing firms and retailers to build up **specific product chains**.

4.4 Sustainability and transparency and the possible effect of changes identified in (3) above.

The production system of cereals varies from relatively extensive to highly intensive, with different levels of input use, mechanisation and monoculture. In the last decades the trend of arable systems in the was the increasing intensification of cropping, while in Italy the split between irrigated and non irrigated crops brought to a **lower environmental impact**, since non irrigated systems generally use fewer inputs of fertilisers and agrochemicals.

Environmental impact of cereals is quite differentiated according to the species:

- Maize is mainly cultivated, often as monoculture, in northern Italy, and it is irrigated. For that reason there are serious **problems of nutrients, pesticide pollution of water, declining biodiversity**, simplification of arable farming systems. Maize is a key component in the animal feed chain (mainly bovine and pigs), very important in Italy: as the rate land/animals is very low, maize supplies a big share of the required feed. Perspectives of reduction of its environmental impact are related to an increase of the demand of organic products and to a rigid application of the nitrate directive, which is still largely unapplied in Italy.
- Rice is cultivated in very selected areas, and its **environmental impact is mainly related to the use of chemicals for weed control**. As a few big companies dominate the chain, attempts to reduce its environmental impact should be based on a direct involvement of them to set up production standards.
- Winter cereals give fewer problems with nutrients and pesticides, but as they are cultivated in hilly areas they can contribute to **soil erosion**. As stated above, there are high economic margins to develop alternative chains based on handmade products.

Besides specific considerations, CAP reform can have a dramatic impact over the current structure: as the premium is likely to be reduced, hard wheat should reduce consistently its acreage; at the same time, rotations could become more convenient in comparison with monoculture.

Trasparency is a very important issue in this industry, especially as far as cereals for animal consumption are concerned. Many regional governments have started to promote traceability systems and certification schemes, and some of them, for example in Tuscany and Emilia Romagna, are already working. Besides, in the animal feed sector many firms have implemented private certification schemes.

4.5 As for (4) above, except that the focus should be on rural development.

The main connections between cereals sector and rural development are related to:

- The revitalization of the extensive animal production systems, located on hilly and mountain areas and based on locally cultivated feed;
- The scaling up of the traditional chains;
- The development of Geographical protection (both as PDO and PGI) initiatives.

4.6 Bottlenecks within the sector to the further development of those actions identified in point (3) above.

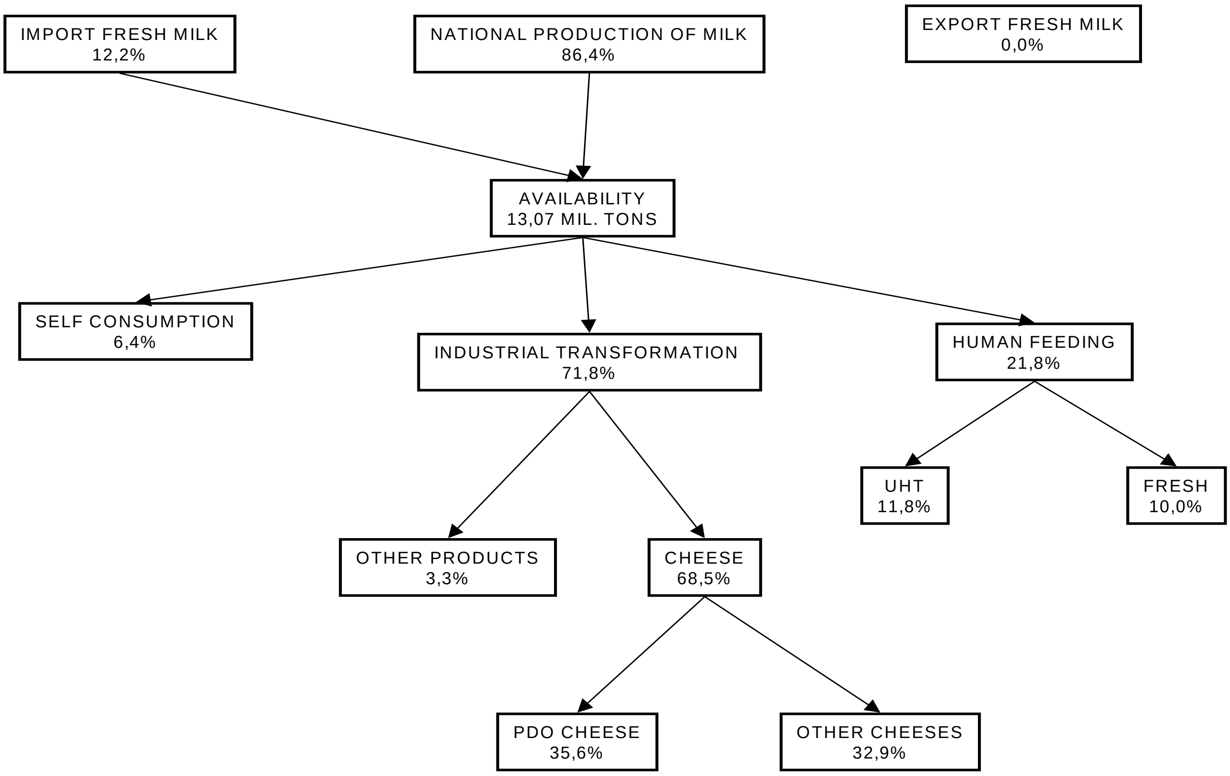
The construction of alternative chains as those identified in point (3) above is strongly related to the **capacity of the involved actors to align around clear projects**. In southern Italy, the major bottleneck is mainly related to **inefficient administration**, which has not fully exploited the opportunities deriving from the EU structural funds.

Dipendence from imports for quality wheat is another bottleneck. Due to lack of coordination along the chain, processors find difficult to purchase the requested input in terms of quality and quantities on the internal market.

DAIRY

4.1 Diagram showing the current structure of the sector

Dairy is the most important sector of the Italian food industry. Its total turnover is 25,000 billions euros (approximately 15% of the total turnover of the food industry). Processing firms are approximately 2000. The national production of milk is estimated around 11.3 million tons (2000), while the total milk



Dairy chain. Diagram of milk utilization by sector (Source: Ismea (2000)

consumed in Italy is 13.07 million tons (imports are 1,76 million tons); 76.2% is directed to industrial transformation, 23.8% to direct consumption. Most important destinations of milk during the transformation process are: Grana Padano (2 million tons), mozzarella (19,9 million tons), Parmigiano Reggiano (1.64 million tons), Crescenza (0.44 million tons), Gorgonzola (0.38 million tons), Provolone Valpadana (0.23 million tons).

In the 2000 the export of cheese was 168,925 tons and the main destinations were, in order: Germany, France, United States, United Kingdom and Switzerland.

The features of Italian milk industry are mostly the **use of milk for cheese production** and the **high level of diversification** of the dairy production.

The sector suffers however from a chronic **insufficiency of national milk for processing**, originated by the European policy of quantitative restriction.

4.2 Description of institutions, organisational forms and governance

The structure of the dairy industry is characterized by the presence of a **group of big enterprises**, and by a **great number of small enterprises**. The production of fresh milk and innovated products is very concentrated, with a great number of mergers and acquisitions still ongoing, while small dimension enterprises, offering typical productions, render cheese production fragmented.

In the sector there is an elevated level of **vertical integration** (ISMEA, 1999).

- Strategic groups: a first group is Parmalat, a multinational company, the second is Granlatte, and its controlled Granarolo, with position of territorial leadership in some segments for the high quality milk. This sector is composed also by many important enterprises, mainly cooperatives (for example, Abit and Lattira Soresina), which operate on the national market.
- In the Parmigiano Reggiano area a classification of the firms can be based on two elements: the degree of vertical integration and the type of strategy pursued on the markets (oriented to the

trade or oriented to the product). In fact, especially for the production of Parmigiano Reggiano, the processing cooperative assumes a role of absolute importance within the supply chain.

- The most important association of the chain is *ASSOLATTE* (*Associazione Italiana Lattiero-Casearia*), which represents the industries of milk transformation (fresh milk, cheeses, yoghurt, butter, other products).

4.3 Areas of the sector that exhibit dynamism in terms of being sustainable or alternative

In the last years, there has been a **tendency to reduce the production of fresh milk and to increase the one of cheese**, also favoured by the further fragmentation of the market caused by the introduction of organic and "high quality" products.

Italy is one the most important producers in the EU of **PDO and PGI cheeses**, with interesting margins of development on the foreign markets. The main typology of a PDO cheese producer is a farm in the North, characterized by small dimensions (less than 10 workers), producing mostly cow milk. 50% of Southern farms don't produce PDO products, while only 10-15% produce cheese according to European processing label.

The national legislation has authorized some **derogation of hygiene requisites** (directives 92/46 and 92/47, in matter of production and breaking in the market of milk) to avoid the crisis of many of the national PDO productions.

With a recent national regulation (Financial law 2003) it is possible for producers located in mountain areas to label their products "**mountain products**". The constitution of some producers' associations, such as the *Associazione produttori formaggi d'alpeggio* and the *Associazione pastori vaganti dell'Arco Alpino italiano* plays an important role in the promotion of mountain products.

There is also an important initiative of certification for the farms located in the Parmigiano Reggiano area. It consists in voluntary systems of environmental management and audit for the **environmental certification** according to Emas (Environmental management and audit scheme). These initiatives represent a system to orient the companies towards a sustainable productive system, trough the adoption of measures to reduce the environmental impact.

4.4 Sustainability and transparency and the possible effect of changes identified in (3) above.

The main environmental impacts of dairy intensive systems are:

- **Pollution of soil and water**, as a consequence of excessive nutrient levels in **manure** and other **farms wastes**, which are much higher than the absorbent capacity of the land available to the dairy unit.
- High risk of environmental damage associated with the storage of large quantities of slurry on farms.
- Intensification of grassland management can **damage biodiversity** as sward's productivity is raised.

As the greatest share of the dairy production is processed into PDO and PGI products, which are affected by restrictive standards, it is possible to be optimistic with regard to the development path of the Italian dairy industry. However, there are several weak points and threats:

- Intensity of production systems is very high. Implementation of **nitrate** directives should improve the level of sustainability.
- The milk quota system has generated strong concentration of milk production into the most fertile areas (Po valley), hampering the possibility for mountain areas to set up alternative systems of production. **Extensive dairy**, for a long time a traditional feature of many mountainous regions, is important to **preserve landscape and biodiversity** in marginal areas, as well as characteristic flora and fauna. The traditional dairying in Alpine regions is associated with particularly diverse habitats and valuable, fragile landscapes of high value for tourism.
- Milk producers who sell to drinking milk packers could be damaged by the authorisation to label as 'fresh' the so-called 'blue milk', which is obtained through a process of micro-filtration. With that, milk companies (such as Parmalat) can use imported milk from surplus countries (which normally has lower prices), and this milk could create tensions on the 'fresh' milk market.

The level of transparency of the dairy industry is quite high, if compared to other sectors. As far as hygiene is concerned, milk and dairy production are controlled by health authorities, while all PDO and PGI products, which represent the biggest share of national output are submitted to additional quality controls which require traceability systems. Besides several schemes, both private and public, have been put into place to improve traceability along the chain.

4.5 As for (4) above, except that the focus should be on rural development.

Organic, PDO and PGI, traditional and 'cottage products' in the milk industry are very important to rural development. They are based on **small-scale farms**, have a softer impact on the environment, activate links with tourism, allow for the maintenance of a higher number of farms, valorise hilly and mountain areas.

As their demand increases, it is likely that a rebalancing of the 'alternative' chain vis a vis conventional chain will be re-established. Indeed, many of the rural regional development plans approved in Italy under 1257/99 regulation support **on-farm processing facilities**. Moreover, a big effort of promotion of typical products is made.

4.6 Bottlenecks within the sector to the further development of those actions identified in point (3) above.

- Retail system not giving to high quality producers enough visibility.
- High power imbalance between small producers and their customers (processors, retailers).
- High level of fragmentation and low level of co-operation between producers, especially in southern Italy.
- Lack of collection centres, above all in the mountain areas where the link between producers and other operators are more difficult.
- Compliance with hygienic rules (suitability of European standard).

FRUITS AND VEGETABLES

4.1 Diagram showing the current structure of the sector.

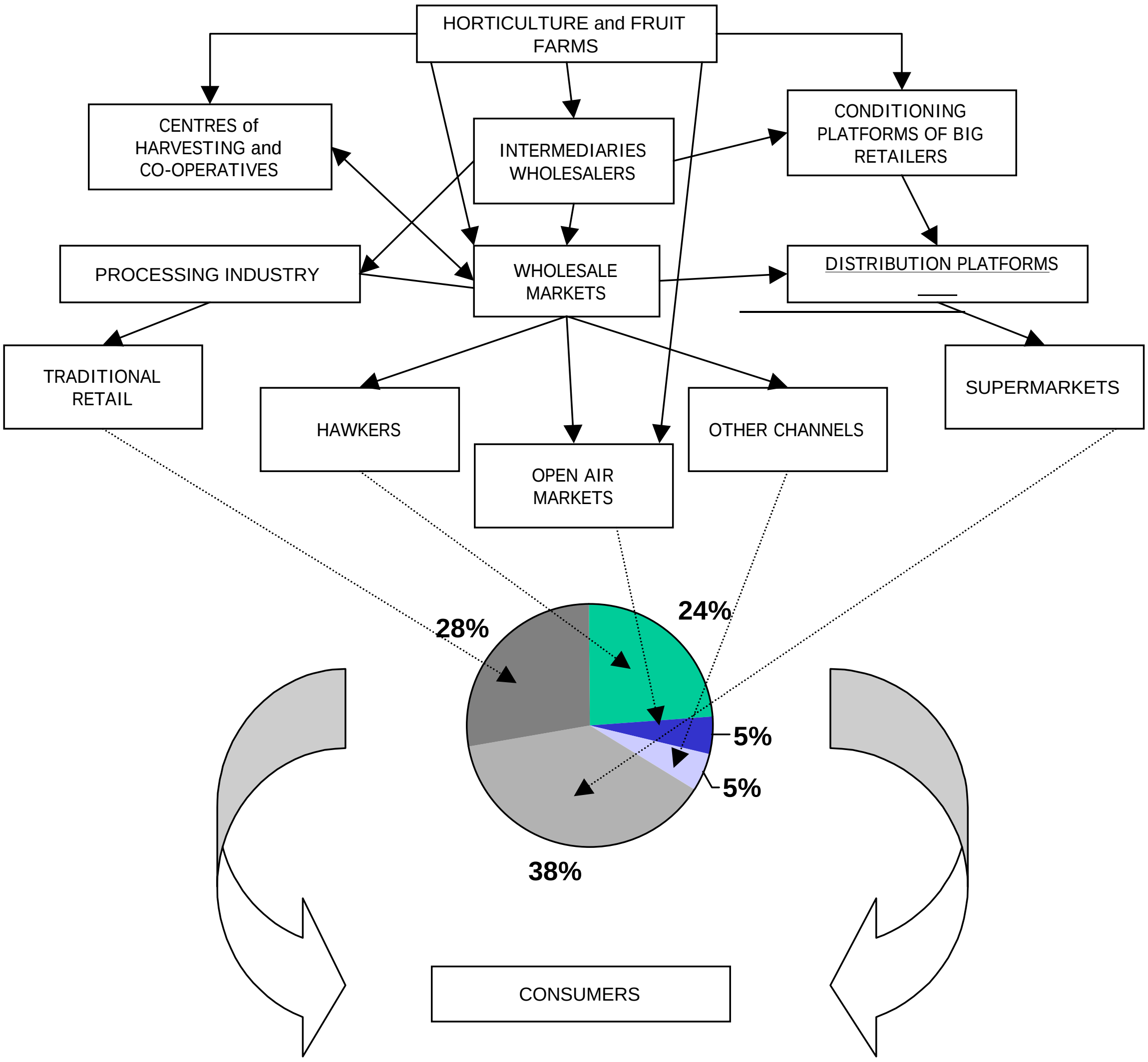
The horticulture sector includes apples, pears and citruses, conserves and fruit juices, vegetables and legumes (in particular tomatoes and potatoes). It consists of 450,000 vegetable farms, 330,000 fruit farms and 120,000_citrus farms, which cover about a million and half hectares (MiPAF, 2002). In 2000 the share of this industry on the vegetable production turnover was about 37% (Ismea, 2001).

	Cultivated area (000 ha)		Harvested production (000 tons)	
	1998	**1999**	**1998**	**1999**
Vegetables	422.492	470.322	11,152	19,191
Fruits	681	677	9,262	10,467

The industry gross product value is 10,595 mio euro, of which 6,605 vegetables.
Due to the diversity of its products and the high number of farms involved, the industry is characterised by a high level of complexity. The following actors are involved in the chain:

- Producers
- Cooperatives or producers' organizations;
- Wholesalers;
- Wholesalers on the intermediate or final markets;
- Traditional retailers
- Modern retail companies

The scheme below shows the flows between them and the quantitative relevance of the typologies of retailers.



Though the share of the supermarket share in this industry is increasing, so far it is far below the level of other European countries, as it is about 38%. Traditional retail shops still market 28% of the sales. This explains why the industry is still characterised by a low degree of concentration. In the last years, closely linked to the development of supermarket chains, there has been a relevant growth of imports, especially from the other hemisphere, to provide continuity of supply along the year.

4.2 Description of institutions, organisational forms and governance

The most important organisations are producers' organisations, instituted by the Reg. CE 2200/96 as the essential element for the stability of the markets and for the reorganization and the consolidation of the Italian production. There are 130 organisations, but they concentrate approximately 20% of the offer, with great differences in the various areas of the Country: the 100% of the Trentino Alto Adige and the 65% of the Emilia Romagna, while in Sicilia only the 7% and the 5% in Puglia (CNCD, 2001).

The most important associations of producers' organisations are:

- UNAPROA, *Unione Nazionale Associazioni Produttori Ortofrutticoli Agrumari e di Frutta* in guscio. In the 2000 UNAPROA grouped 75.000 producers with more than 5,5 million tons collections, with a surface beyond 200.000 hectares for a value of 1,8 billions of euros. ·
- UIAPOA, *Unione Italiana Associazioni dei Produttori Ortofrutticoli e Agrumari*: the union groups 36100 producers for a value of the production of beyond 650 million euro.
- UNICO (Unione Nazionale Italiana Commercio Ortofrutticolo) was constituted in 2001 by wholesalers and producers. This organism has recently completed the phase of constitution of the main "Committees of product" and it has changed its charter in order to receive also the great distribution. In this organism the transformation industries still lack.

4.3 Areas of the sector that exhibit dynamism in term of being sustainable or alternative

The areas that exhibit dynamism in term of sustainability are:

- *The* **traceability system**: the Italian government, with national decree 306/02, has sanctioned the obligation to indicate the origin, the variety and the category of the fresh fruit and vegetable.
- **Initiatives for the maintenance of native genetic resources***:* regional policy is oriented to preserve specific species or races, whose breeding is a supported by EU funding. Tuscany Region has instituted since 1997 (with L.R.50/97) a regional list of the native genetic resources.
- The national **organic** surface was 1 million and 200.000 hectares in 2001, and it increases with an annual rate of 19%. Horticulture cultivation involves 231.595 hectares of that, and in particular 18% (41.827 hectares) is covered by fresh fruits and 5% (11.600 hectares) is represented by vegetables. Citruses, that alone cover 8% of the organic cultivations of the sector, are beyond 18.000 hectares. In particular the organic peach is the greatest diffused cultivation, with approximately 1.200 hectares, and then there are the apple (1.150 hectares) and the actinidia (Ismea, 2002).

  In spite of the strong growth of organic markets and their exports, there is an elevate share of organic products, which are sold without any certifications of being of organic farming. According to Ismea data (2003), 70% of organic fruit is commercialised without any certifications.

  Among the distributive channels, the modern distribution is more important than traditional retail, and also the direct selling is decreasing.
- Also the sector of **PDO/PGI label** is composed by products mostly in phase of development and extension. The increase of these markets is a consequence of a greater knowledge and interest for this type of products; an important contribution has come from the creation of private label by the modern distribution. The greater spread is in the regions of the **North-Centre**, while in the South consumptions still are little.

4.4 Sustainability and transparency and the possible effect of changes identified in (3) above.

Generally, the majority of fruits and vegetables produced for the domestic market are grown in relatively **intensive systems** and often in **controlled environments** (Glasshouses, tunnels). In recent years in this sector there has been a significant intensification of production systems, with increased use of energy, artificial inputs and irrigation, as well a significant expansion of production under plastic. That has brought to generalized **environmental crisis**: salinisation and water shortage are common in many horticulture areas, and in some areas put the production systems at risk.

In some areas there has been a marked growth in the use of integrated farming system applying techniques such as **organic** pest control and water recovery systems. There are some areas where fruit and vegetables provide welcome **diversity**, and the system has been transformed using integrated or organic methods, often trough programmes which are linked to **labelling** and **quality** marketing or quality assurance initiatives.

4.5. As for (4) above, except that the focus should be on rural development.

If on one hand horticulture has a very high environmental impact, it also allows the **maintenance of a high number of farms**, especially in the South, and therefore is an essential source of employment. As international competition forces farms to cut prices and to industrialize production, it is now recognized that a possibility of survival depends on **differentiation**.

As Italian consumers show a preference for local products, the **traceability** system will help producers to be more visible to consumers. That also enhances initiatives aimed at improving product **quality** by doing integrated pest management, using **local breeds** and limiting productivity per unit of land. The integrated production is characterized by an **elevated fragmentation of the supply**, even if the producers are organized in cooperatives.

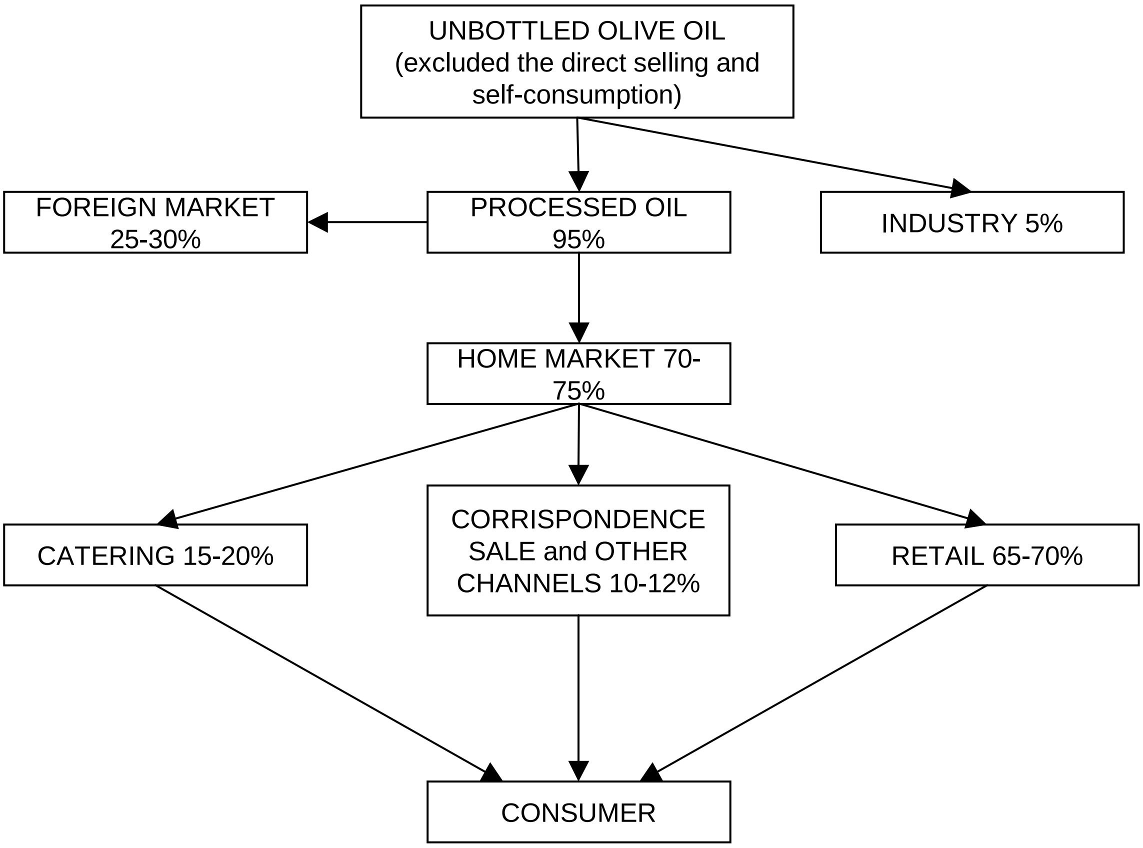
4.6. Bottlenecks within the sector to the further development of those actions identified in point (3) above.

It is possible to identify the limits to the development of the sustainability chains as follows: ·

- Above all in the Centre and the South of Italy **fragmentation** is a tangible obstacle for economic sustainability and for the contractual power of the producers. In fact the producers organizations developed only in the areas of the North.
- The state of **inefficiency and marginality of the Italian wholesales market**: the services are not able to satisfy the demands for the modern distribution (Ismea, 1999). ·
- Often the products with elevated qualitative standard are commercialised through the **traditional channels** (market place or traditional detail) together with products of inferior quality with lower prices; the consequence is that quality products decrease their quotations. ·
- Difficult **relationship between the sector of the organic production and the modern distribution**: in spite of the fact that modern distribution has represented a fundamental factor for the diffusion of organic horticulture, improving the guarantees supplied to the consumer, often modern distribution has had a difficult approach with the world of the production, for the demands of homogeneity and logistics, which cannot indeed be satisfied from all the organics farms (Giardina, 2003).

OLIVE OIL

4.1 Diagram showing the current structure of the sector



After Spain, Italy is the second producer of olive oil in the EU, with 450,000 tons. The production to the base prices (Ppb) of olive oil affects 4.5% of total of agriculture and for the 2000-2001 campaign it was attested on a level of 1,9 million. The 87% of national olive Ppb is localized in the southern regions: Puglia (36.4%), Calabria (25%), Sicily (9.2%). The regions of the North-Centre instead cover the 13.2% of the production: Lazio (5.6%), Tuscany (3.4%) and Umbria (2.3%) (Ismea, 2001).

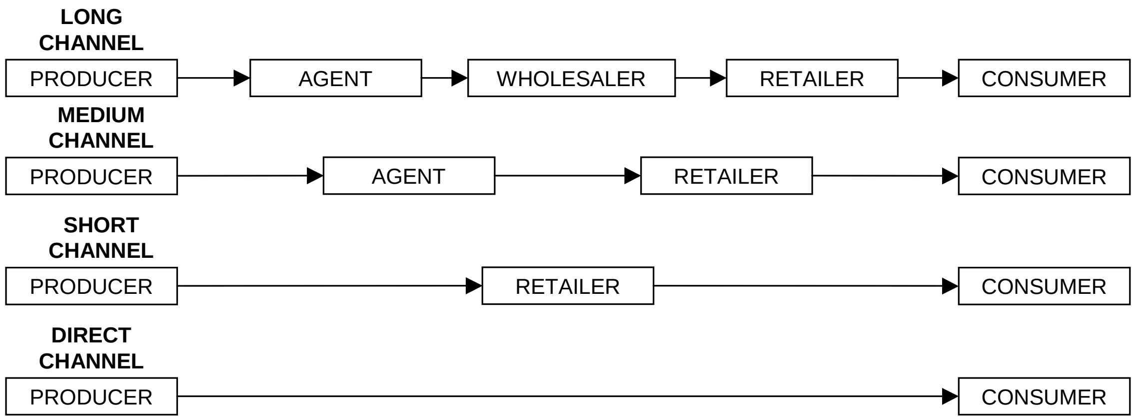
Italian olive oil market can be divided into three main big segments:

- High quality extra-virgin;
- Industrial extra-virgin;
- Industrial staple oil.

Organization of the chain differs according to the segment. In the first segment, **high quality extra-virgin**, the production phase has a key role, and therefore the main drivers of the chain are olive growers: olives have to be picked up very soon and milled into selected olive mills. Often producers mill their olives but keep the oil to sell it directly. This product gets very high prices (from 8 to 12 euro per litre and more) and is sold to tourists, export markets, but also to local people by direct selling.

In the second segment, **industrial extra-virgin,** oil companies are the main drivers. Their core activity is related to purchasing (in Italy and abroad), making blends, bottling and selling the product mainly to big retail chains and to the export markets.

The third segment, **industrial staple oil,** is characterised by low prices. Its destination is mainly export markets, where there is still a lack of awareness about quality. Also in this case oil companies are the drivers. An important part of the purchases for this segment is production of Southern Italy, which is driven by the CAP subsidies and therefore managed in a very extensive way with no attention at all to quality. The market of the oil of olive in Italy is the biggest in the world, both for consumption and commercialisation activities.



The most important channels are the traditional retail and the big retail chains. Generally there are intermediate figures between these structures and the farms.

4.2 Description of institutions, organisational forms and governance

- UNAPROL *(Unione Nazionale tra le associazioni di Produttori di Olive)*: with beyond 650,000 members is the biggest Italian organization.
- UNASCO *(Unione nazionale Associazioni Coltivatori Olivicoli)*: 170.000 producers members and 34 Associations in all national territory.
- FEDEROLIO *(Federazione Nazionale del Commercio Oleario:)* the greatest Italian organization of the category in the trade sector.
- CNO *(Consorzio Nazionale degli Olivicoltori)*: the national Union of Associations of olives and olive oil producers, constituted with the goal to organize the members for commercialization, promotion, concentration and production activities on the markets - national and international.
- ONAOO *(Organizzazione Nazionale Assaggiatori Olio di Oliva).*
- AGECONTROL (*Agenzia per i controlli e le azioni comuniatarie nel quadro del regime di aiuto all'olio di oliva):* it has the task to assure the correct application of the EU rules by controlling Associations of producers and their Unions, oil-mills and other subject like the refineries, packaging enterprises and commercial operators.

In 2000 the *inter-professional agreement* of the olive oil sector was signed, with the primary objective of valorisation of extra-virgin olive oils. As a result of this agreement the *Consorzio di garanzia per gli olii extravergini di qualità was born*.

The industrial sector of the olive oil is constituted by firms of packaging and commercialisation with label of national and international spread. The biggest industrial enterprises are: Van Den Bergh, Nestlé Italy, Carapelli Florence, Salov, Carli, Oil mills and the Italian Olearia House.

The first seven biggest firms (Bertolli, Dante, Pebble, Carapelli, Saint George, Sagra and Monini) hold some 50% of the market of olive oils and approximately 40% of extra-virgin oils market.

4.3 Areas of the sector that exhibit dynamism in terms of being sustainable or alternative

Italy holds 24 PDO and one PGI oil. The main part of the PDO/PGI started a production certified and commercialised on the national and international market. In August 2001 the level of olive oil with PDO/PGI brands was 3,533 tons. In the map of PDO the Puglia comes to the fore with four denominations and the brand *Terre di Bari* with 100,000 associates, 350 oil-mills and a production of 700,000 quintals.

Furthermore, Italy is the first producer of organic oil of EU. From little more than 5.000 hectares in 1993, the surfaces dedicated to the organic production have grown in order to reach 45.000 hectares in 1997, while in 1999 they doubled, reaching 90,000 hectares. In Italy the consumption of organic olive oil is particularly concentrated in the North.

4.4 *Sustainability and transparency and the possible effect of changes identified in (3) above.*

Environmental impact of production:

- Soil erosion is widespread in areas with intensive olive farming;
- Water pollution is associated with many intensive systems, often caused by eroded soils;
- Irrigation is expanding rapidly in the olive sector and is contributing to the hard pressure on aquifers in several regions. For example in Puglia irrigated olive plantations continue to expand although ground waters are already being severely depleted.
- Biodiversity loss arises from a variety of changes in management. It can result from the rationalisation of product through replanting which has become common, usually accompanied by the Clarence of remaining patches of natural vegetation, field boundaries, rocky areas and dry-stone walls. Frequent tillage and heavy pesticide use also results in a very considerable reduction in the diversity and total numbers of flora and fauna, including beneficial insects species.
- The low input systems are of considerable value.
- Biodiversity tends to be high in traditionally managed olive plantations because their structural diversity (trees, under storey, patches of natural vegetation, dry-stone walls) provides a variety of habitats. Keeping low the level of pesticide use supports a rich flora and insect fauna.
- Traditional olive terraces are characteristic of upland landscapes in some Italian regions (Liguria), and contribute to their attraction for tourism. Terraces also help to slow run-off and improve water penetration, reducing the risk of floods in lowland areas. However, stonewalls supporting them are now often in a state of general neglect and semi-abandonment, resulting in a loss of form and function which becomes irreversible after a period of time.
- In areas with a high proportion of land under forest and scrub, and consequently high fire risk, olive plantations can play a useful role as firebreaks.

The degree of transparency of the industry is rather low. Apart for a high rate of frauds (addition with non-olive oils), consumers don't have the certainty of the origin of the product they buy. As there is a high demand for local (and national) product, many sellers play on the ambiguity of the rules to sell consumers olive oil coming from other regions without making it clear to them. The recent European rules regarding bottling and labelling are aimed to restrict these practices, but they have shifted the power along the chain to the big companies and to get small farmers selling directly into trouble for the increased costs they have to undergo.

4.5 *As for (4) above, except that the focus should be on rural development.*

Development of the market probably will be characterised by increasing attention to the quality of products. It is possible to foresee an evolution of dynamics of differentiation for the extra-virgin segment. The market of PDO/PGI products and the increasing spread of organic production will determine an increment of quality, so that to justify its further division. The PDO is an important instrument in order to favour the commercialisation of quality oils, but, although the recent progresses, there is still a long way to be completed in order to take advantage of the potentialities. In spite of the productions with European label could represent an opportunity for the Italian oil on the worldwide markets, they confirm the structural weaknesses of the oil sector: small and fragmented supply; low level of promotion and marketing.

4.6 *Bottlenecks within the sector to the further development of those actions identified in point (3) above.*

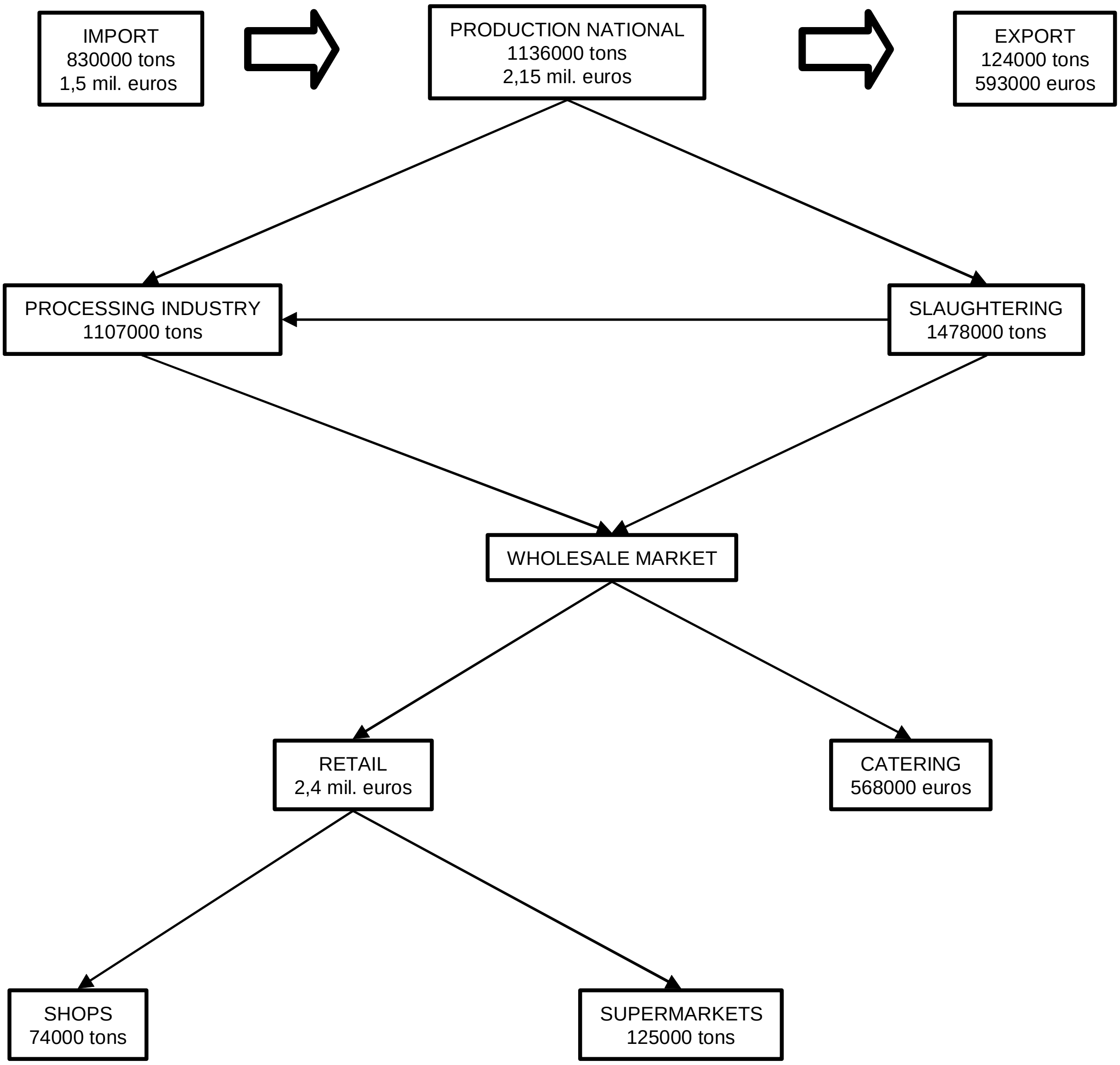
Olive oil is one of the most promising agro-food sectors for the "alternative" chains. However, there are many weak points and threats:

- The high concentration of oil companies, and their tremendous market power, with high investments in advertisement and brand development, is a threat for high quality olive oil producers. They are invading also the high quality segment (now it is about 1% of their business), with a strategy aimed at raising the image of the brand.
- The poor structure of olive production in the South. Lack of financial and entrepreneurial resources, together with institutional looseness and administrative inefficiency have so far limited the development of the high quality segment.

- Recent regulations have shifted dramatically the power to oil companies. According to the reg. 1019/2002, it is not possible to sell olive oil unbottled and into package bigger than 5 litres. That means that the traditional pattern of selling (preferred by local consumers to purchase a good oil at a reasonable price) has been seriously damaged (CIA, 2003).

PIGS

4.1 Diagram showing the current structure of the sector



Source: Ismea, 2001

The rate of national self-consumption was 60%. In 1999 the Italian delicatessen factories recorded an increment of export of 21%, represented by 50% of ham and 40% of PDO and PGI products (ISMEA).

In the areas of the North-Centre is concentrated the 70% of the Italian pig production; Emilia Romagna (26%) Lombardia (16%), Piemonte and Tuscany (8%). A great proportion of the meat production is used as source for the cured ham segment.

According to the data of the Ministry of Health 3.685 slaughterhouses produce salt pork with European brand operate in Italy. The supermarket sold in 2002 46% of the total sales of salami, while the traditional retail 54% (Assica).

4.2 Description of institutions, organisational forms and governance

The sector is characterised by an elevated degree of fragmentation, with more than 1.500 farms, the first five of which don't reach 25% of the total. (ISMEA, 1999).

There is a tendency to productive concentration, even if there are still many farms of small dimensions producing for the self-consumption or for the local circuits. In particular, the Italian sector presents an emphasised character of **diversity**: in the South the farms of small dimensions are dominant; while in the North the consistency of pigs farms and their localisation facilitated processes of fusion and joining consortia, concurring to the economic growth on the domestic and international market.

The experience of multinational enterprises in the sector hasn't had a positive outcome: after few years the multinational enterprises went out of the sector, as a consequence of the strong fragmentation of the Italian market (Agrisole, 2002).

The level of integration can be considered intermediate between the highest levels of the avicultural sector and the rather limited of the bovines. The prevailing technique of breeding is the closed cycle, even if *contracts of soccida* (agistment) between breeders and enterprises are frequent, supplying swine sector with fatten and fodder. The production of *heavy swine* (peculiar of Italy) is almost all handled by the enterprises of transformation. Some breeding are integrated vertically for the production of light pig for the GDO (for example COOP Products: *Prodotti con amore*).

The main organisations of the sector are:

- ANAS (*Associazione nazionale allevatori suini*): it was born in 1962, its activity is spread on all the national territory and it is proposed to improve and to value national pigs breeding.
- UNAPROS (*Unione nazionale delle associazioni produttori suinicoli*): it presents ten associations of producers for a total of heads corresponding to 50% of the national assets, with 80% of the associates producing for the circuit of PDO ham.
- ASSICA (National Association meat processing firms), within which the Institute for the valorisation of the Italian *salumi* was born, operating for the promotion.
- UNAZOO: National Union of animal production Associations.

4.3 Areas of the sector that exhibit dynamism in terms of being sustainable or alternative

The pig sector in the last two years was subjected to damages of image as a consequence of the sanitary emergency; so that it was possible to understand the importance given to the directed relationships with the raw materials and the activation of control systems. There are a lot of initiatives finalised to the control and the certification of supply chain, like the system of **traceability** UNI ISO 10939. The objective of the big enterprises is to catch up the complete traceability in all steps of production.

The small enterprises exercise a protection of the **typical products**. In Italy there is the **highest number of PDO and PGI of Europe**. Currently there are 25 types of salt pork with PDO and PGI brand (between which two super-brands: Parma and San Daniele) developing 25% of the turnover of the Italian delicatessen sector, exceeding the 7,2 billions of euros.

There is still an **insufficient spread of pig breeding in one's natural estate**, with the exception of some recent experiences (in the regions Veneto, Friuli Venezia-Giulia, Toscana, Umbria, Calabria and Sicilia) connected with niche products and with the activity of agro-tourism, such as the recovery of some traditional races, like the *Cinta Senese*, the *Mora Romagnola* and the *suino nero delle Madonie*.

4.4 Sustainability and transparency and the possible effect of changes identified in (3) above

The intensive breeding (above all in the North) determines environmental problems, in relation to **waste** management. In spite of the limited spread, also pigs would have the possibility to adapt to extensive forms of breeding, contributing to the ecological and social safeguard of the territory.

As for transparency, hygiene and unauthorized drugs are controlled by health authorities, but in recent times there has been a blossoming of quality schemes drawn by initiative of producers and supported by public authorities. For example, there is an important initiative of certification for the farms located in the "**District of ham**". It consists in voluntary schemes of environmental management and audit for environmental certification. It is regulated by the EU regulations *Emas* (Environmental management and audit scheme).

4.5 As for (4) above, except that the focus should be on rural development.

Rural development grows on the valorisation and the **recovery of traditional races**. The transformation sector is very important to make emerge regional productive peculiarities. Even if, beside productive truths with high penetration and wide market (Prosciutto of Parma and San Daniel), there are numerous niche products with low penetration, whose spread and valorisation are tied to the development of the protection consortia activity.

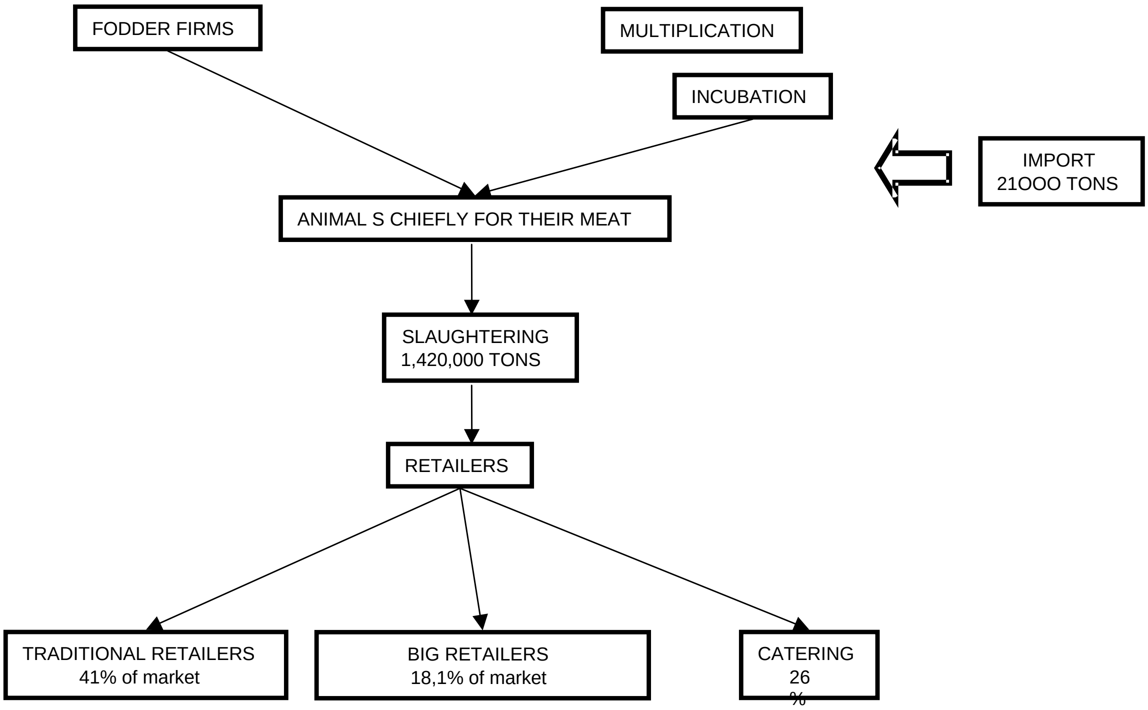
4.6 Bottlenecks within the sector to the further development of those actions identified in point (3) above.

The obstacles to the sustainable development can be identified in the **dependency from the foreign market for intermediate and final products**, in the **reduction of the structures of slaughtering** and in the insufficient activity of the consortia of the niche productions.

POULTRY

4.1 Diagram showing the current structure of the sector

The gross product value of the poultry sector was in 2001 1920 million euros for meat and 920 million euros for eggs. The structure of the chain of poultry meat is shown in the scheme.



Source : ISMEA and ISTAT (1997)

4.2 Description of institutions, organisational forms and governance

The poultry sector is characterised by a strong process of **vertical integration**; as a consequence integrated systems of production, with a high co-ordination between the production of poultry-feed and chickens, fattening, slaughtering, transformation and distribution is created. The 80% of the production comes from vertically integrated companies.

In Italy the production is concentrated in some provinces of the North, in which many co-operatives operate; they can guarantee a contractual power also to the producers. Nevertheless, the contractual power of industry and distribution is extremely strong. The industrial enterprises integrated with the breeding exercise a direct control through the possession of the same ones or through contracts of supply of raw materials and capitals.

The main organisation of the supply chain is UNA (*Unione Nazionale dell'Avicoltura*), born in 1958, which in short time acquired a role of great importance for the Italian aviculture, so that today it unites nearly the totality of the avicultural farms of our country.

4.3 Areas of the sector that exhibit dynamism in terms of being sustainable or alternative.

Recently the sector suffered of a loss of image, because of the crisis generated by the avian flu epidemic, the scandal of *dioxin*, and by other types of contamination, making it necessary to adopt programs for assuring quality.

The system of integrated supply chain represents a fundamental instrument for the definition of traceability outlines, through which it is possible to exercise a control on the steps of production. The concentration of the sector (above all in the district of the Emilia Romagna) facilitated the adoption of control systems, in order to identify responsibilities and to reassure the consumer. The small farms, out from system of vertical integration, have tried to create production niches, with poultry of particular species (like quails, Pharaoh), while a part of the farms aim at gaining the image of the "farmyard chicken" and to develop short channels of selling (small retail, restaurants). Lastly there are niches of "GMOs free" poultry.

4.4 Sustainability and transparency and the possible effect of changes identified in (3) above.

In terms of sustainability, the sector represents the activity that has developed the most important industrialisation process in the last years, with intensive breeding that involves a remarkable environmental impact, as a consequence of the pollution of water and the ammonium phosphate emission in the organic refusals. In spite of everything the intensive use of advanced technology stretches to render the processes more efficient

4.5 As for (4) above, except that the focus should be on rural development.

The elevated level of vertical integration can offer advantages in terms of reduction of transaction costs, exchange of information and control of the entire process. But the risk is the consequent weakening of the contractual power of the breeders, which can be assures by the concentration of the supply in co-operatives, so far only located in some province of the North.

4.6 Bottlenecks within the sector to the further development of those actions identified in point (3) above.

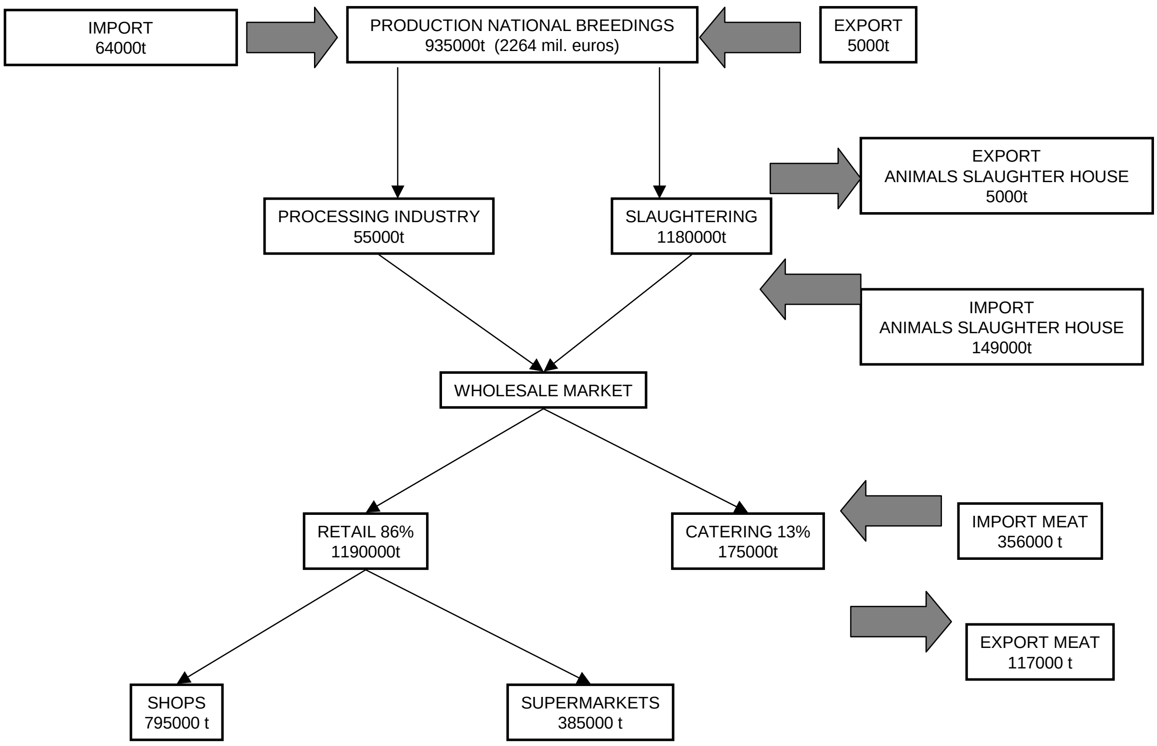
- Lack of information among consumers about the logic of the integrated supply chains;
- Foreign pork is often sold with particularly aggressive prices;
- Insufficient contractual power of the producers.

BEEF

4.1 Diagram showing the current structure of the sector

The Italian bovine breeding is composed approximately by 135.000 farms, with a gross added value equivalent to 24% of gross domestic product. However since 2000 the national sector has crossed a difficult period because of the sanitary emergencies.

The Italian production system is characterised by an elevated distinction between the North and the South: 70% of the cattle is localised in the North, 10% in the Centre, and 20% in the South. 75% of the slaughter is situated in the North, 10% in the Centre and 15% in the South. The 20 biggest firms of slaughter and commercialisation hold some 30% of the market. (Ismea, 1999).



Source: Ismea, Istat, 1999

4.2 Description of institutions, organisational forms and governance

There is a progressive weakening of the contractual power of the breeding farms, as a consequence of the lack of horizontal co-ordination. In fact, with the exception of some local initiatives, the system of the co-operation is very weak. The tradition in this sector is still important and as matter of fact in some local situation the mediator still exists. Many breeders, above all those of small sizes, but also the butchers, are entrusted to such operating that have the task to diminish the information costs.

The contractual power of fodder firms is increasing, determinated by an elevated degree of strong specialisation and concentration of this industry. Industrial enterprises of big dimensions generally introduce an elevated vertical integration. The purchase of animals and meat from the foreign countries, with competitive prices, renders even weaker the contractual position of the breeders.

It is possible to observe the increase of contractual power of modern distribution, which is able to affect the organisational and managerial politics of the breeding enterprises. There is a substantial difference in the planning for supply of the product. Among the GD companies the spread of the products with commercial brands is always big, rendering necessary the organisation of a control system of the FSC. At the contrary DO operate with logistic of decisional decentralisation, through operators who guarantee greater flexibility: the contracts with the suppliers, aimed at determining the characteristics of the products, the respect of the time of delivery and the selling price.

The most important organisations of the sector are:

- AIA (*Associazione Italiana Allevatori*): its action is centred on technical, managerial, economic and scientific activities: it controls the productivity of the cattle, held in the *Genealogical Book*, and gives technical assistance. In addition AIA is an interlocutor of the Ministry of the Health, the *Agea*, the Regions and the European Community, and it collaborates with the Universities and CNR (Italian national research council);
- Assocarni (*Associazione nazionale industria e commercio carni e bestiame*): it constitutes the main representative centre of the Italian industry of bovine meats (slaughter and transformation), supplying technical and legal assistance to its members;
- UNAZOO: *Unione Nazionale Associazioni Zootecniche*
- UNICAB: *Unione Nazionale delle Associazioni dei Produttori della Carne Bovina*.

4.3 Areas of the sector that exhibit dynamism in terms of being sustainable or alternative.

During the last years the Italian sector, as in many other countries, has undergone strong changes, as a consequence of the CAP impact and the contemporary evolution of the final demand. Following the scandal of BSE the bovine meat sector is passing through a hard crisis. A strong **consumption shrinkage** has been recorded, consider by many to be "structural" and from which alternative products (white meat and pork) are gaining benefit. In order to face the crisis, it was necessary to provide measures to gain the consumers trust back, by making the origin and the path along the chain clear and evident. The respect of the norms for **quality production** (hygienic-sanitary, PDO and PGI norms) becomes part of this new way of production. The introduction of the **certification systems**, which assure the **traceability** of the product (Reg. CE 1760/2000 and national decree 30 August 2000) is a fundamental step.

Organic production still appears a young sector, but growing. As a matter of fact organic breeding has developed in recent years (in 2001 organic farms were 1.500, compared to the 500 of 1999); the 330.000 organic bovines represent approximately 4% of the national assets (MiPAF, 2002).

The extensive breeding of **local races** represents an important opportunity for the development of marginal areas, particularly the mountainous areas, which have a strong vocation for that because of their environmental and social conditions.

In these areas there are some commercial initiatives to improve and promote meat quality: the **Coalvi (C*onsorzio Allevatori Vitelli per la per la produzione di carni garantite di razza Piemontese*)**, the Consortium of Calves Breeders for the Production of warranted meat of Piemontese breed) represents a good example of how an efficient marketing strategy can transform meat from anonymous "staple" into a "quality product" which is clearly recognised by most consumers. Coalvi, which was acknowledged by the former Ministry of Agriculture as "Quality Mark", was established in 1984 although the promotion and guarantee activities already started in 1968 and strengthened in 1975. Today the Coalvi takes part to all the most important initiatives of the EEC about quality beef: from the Regulation 2081/92 for the acknowledgement of the Protected Geographical Indication "*Fassone del Piemonte*" to the Regulation 1318/93 for the promotion of the "*European Quality Beef*". Anyway, given the high costs for the quality characteristics of the Coalvi - *Fassone del Piemonte* meat, the better choice is undoubtedly that of looking for a niche in the market among the middle-high income consumers, capable to know the difference among the several meats and to use correctly all the beef cuts.

Another important experience is the one of CoopItalia, the biggest retail chain in Italy, with the brand *Carni con amore* (Meat with love). Its idea is quite original for the Italian situation: it implemented a "**quality system**" extended to hundred of farms (about 450), 12 slaughterhouses and several middlemen. It is based on a written blueprint undersigned by the interested parts by which they guarantee to follow specific norms of production (race breeding, composition of feed, allowed or prohibited drugs, conditions of slaughter, transportation). Furthermore, CoopItalia has set up a framework of controls and imposed an information system on the farms involved that keep records of each animal slaughtered.

On the wave of Coop Italia, several supermarket chains have launched brands positioned on the same target of “Carni con Amore”, that is focusing on an idea of “controlled meat”, both as private labels (as in the case of *Standa*, with *Natura Più*) and as industrial labels (as *Pascoli del sole* by INALCA).

4.4 Sustainability and transparency and the possible effect of changes identified in (3) above.

In Italy beef production is mainly based on intensive technologies, which make intense use of mais to feed animals, and have a very high number of animals/ land. In great part, intensive breeding are concentrated on the fattening phase, so calves have to be purchased by outside. Italy is one of the most relevant markets for live animals, as it imports 387000 live animals per year (source: Ismea 2001).

Therefore, besides water pollution derived from livestock wastes, intensive fodder production and emissions of methane, the beef sector has a low level of sustainability performance due to live animals transport.

More extensive systems, by contrast, contribute to the maintenance of cultural landscapes, especially pastoral habitats in the hills and mountains.

The spread of certification initiatives of environmental impact (ISO14000) is still very limited.

4.5 As for (4) above, except that the focus should be on rural development.

The **breeding of local races**, although has still modest dimensions, inserts the offer in the market segment of quality products.

The permanence of a network of small structures of slaughterhouses currently concurs for the economic development of marginal areas, through the support to local breeding. At the same time these structures are not always suitable to approach modern distributive channels, because they are not able to guarantee sufficient qualitative and homogeneity levels of the product.

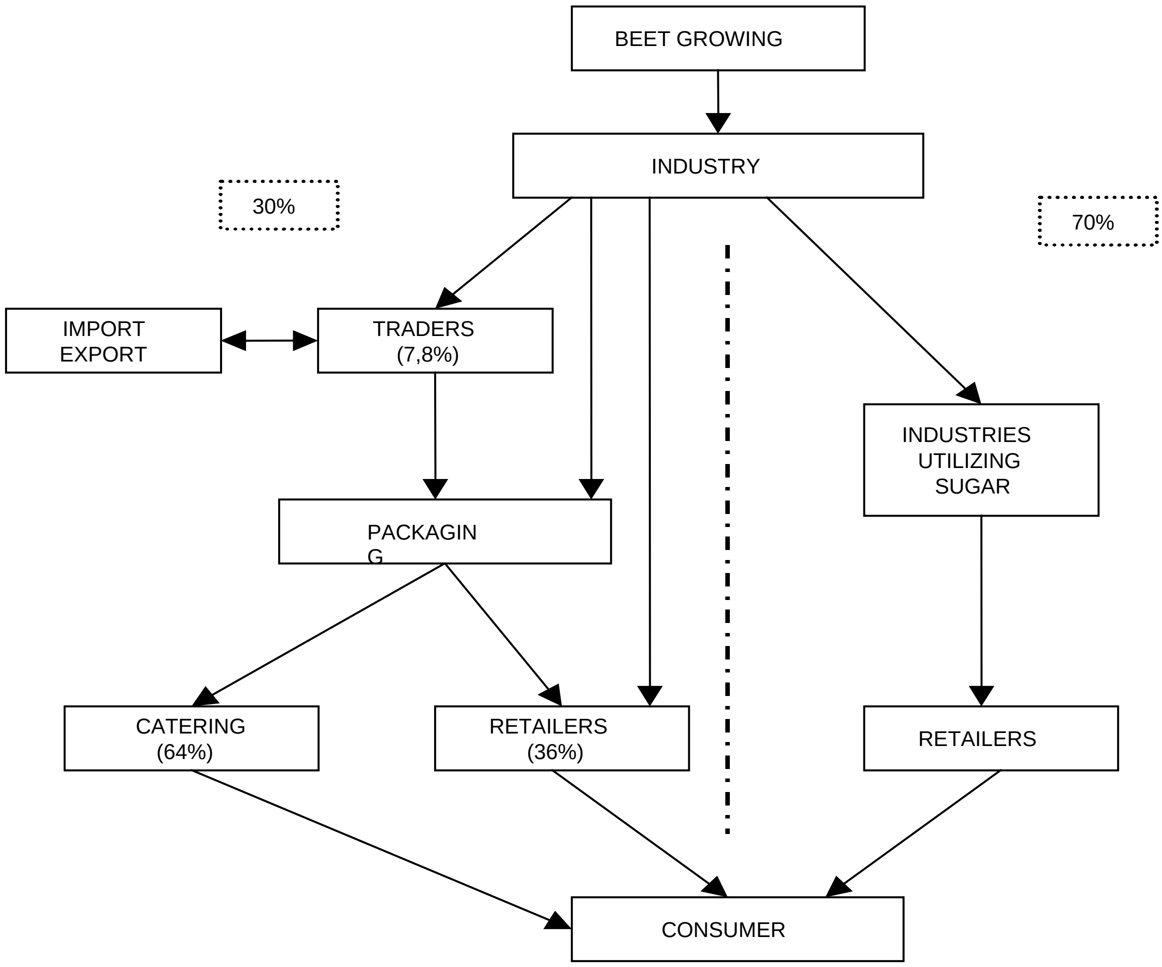
4.6 Bottlenecks within the sector to the further development of those actions identified in point (3) above.

The bottlenecks to the further development deriving from:

- Insufficient knowledge among the operators of the sector about **certification systems**;
- Dependency from the **foreign market** for the purchase of intermediate and final products;
- Reduction of the abattoirs, and the increase of modern distribution, whose demand and power are badly adapted to the traditionally fragmented sector.

SUGAR

4.1 Diagram showing the current structure of the sector



The Italian sugar production comes exclusively from sugar beet. National production of beets is 12 million tons, interesting 70.000 farms, 21 sugar-refineries, with an income of 1.300.000 Euros (Iob, 2002). The reduction of sugar production, decreasing of 5.5% in the 2001, becomes part of a general tendency. This situation is due to the strong weight of the imports.

The Italian sector is characterised by a strong fragmentation of the operators active on the market. Besides the sugar-refineries, there are importers and traders.

4.2. Description of institutions, organisational forms and governance

- ANB *(Associazione Nazionale Bieticoltori*): the ANB is the only Italian Association included in the CIBE (International Confederation of the European Beet growers);
- CNB *(National Consortium Beet growers)*: it is an Association of second degree including 19 territorial Associations covering all the beet production areas of the Country. The associated are 30.000, with 23% of the national beet production.
- ABI *(Association Italian Beet growers*): a big national group that favours 19 sugar-refineries with production advanced of 13 million quintals of beets - 11% of the national harvest.
- FINBIETICOLA: holding company of national associations (CNB, ABI, ANB).
- ANTZA, *Technical National Association of the Sugar and the Alcool.*
- ASSOZUCCHERO, *National Association between the Manufacturers of the Sugar of the Alcool and Lievito.*

The Italian sugar industry is very concentrated, and today four large enterprises hold the market: Eridania-Sadam, Italy Sugars, Sfir and Sugar-refineries of the Molise region. They represent approximately 75% of the sales, while the remaining 25% is distributed between the so-called "private packagers", which acquire sugar in part from the Italian industry, but above all from foreign country (AA.VV, 2003).

4.3 Areas of the sector that exhibit dynamism in terms of being sustainable or alternative.

The sugar industry is engaged in the effort of renewal, finalised to attribute new values to sugar commodity. In particular, the tasks are the strengthening of brand and the diversification of the supply. Among the new products, organic sugar is surely the most interesting product.

4.4 Sustainability and transparency and the possible effect of changes identified in (3) above

Environmental impacts of production (Baldock, Dwyer, Sumpsi Vinas, 2002):

- The dependence of sugar beet production on herbicide use is higher than for most other arable crops and reduced the presence of weeds, and probably other wild species, in farmland areas where beet is grown;
- High levels of nitrates potentially released from the leaves of the plant pose a risk for the pollution of groundwater and surface water.

4.5 As for (4) above, except that the focus should be on rural development.

In spite of a growing spread of the organic products between the consumers, the organic method of cultivation is still not used for the beet. The organic sugar production now doesn't arise the interest neither of the farmers nor of the industries of transformation.

The use of conventional sugar in the food with organic certification (jam, juices, etc.) has been admitted trough a specific exception in Reg. CE 2092/91 (art 5). As a consequence of an insufficient amount of national organic sugar it is necessary to use other sweetening (honey) or the imported sugar from extra-European countries, made from the cane.

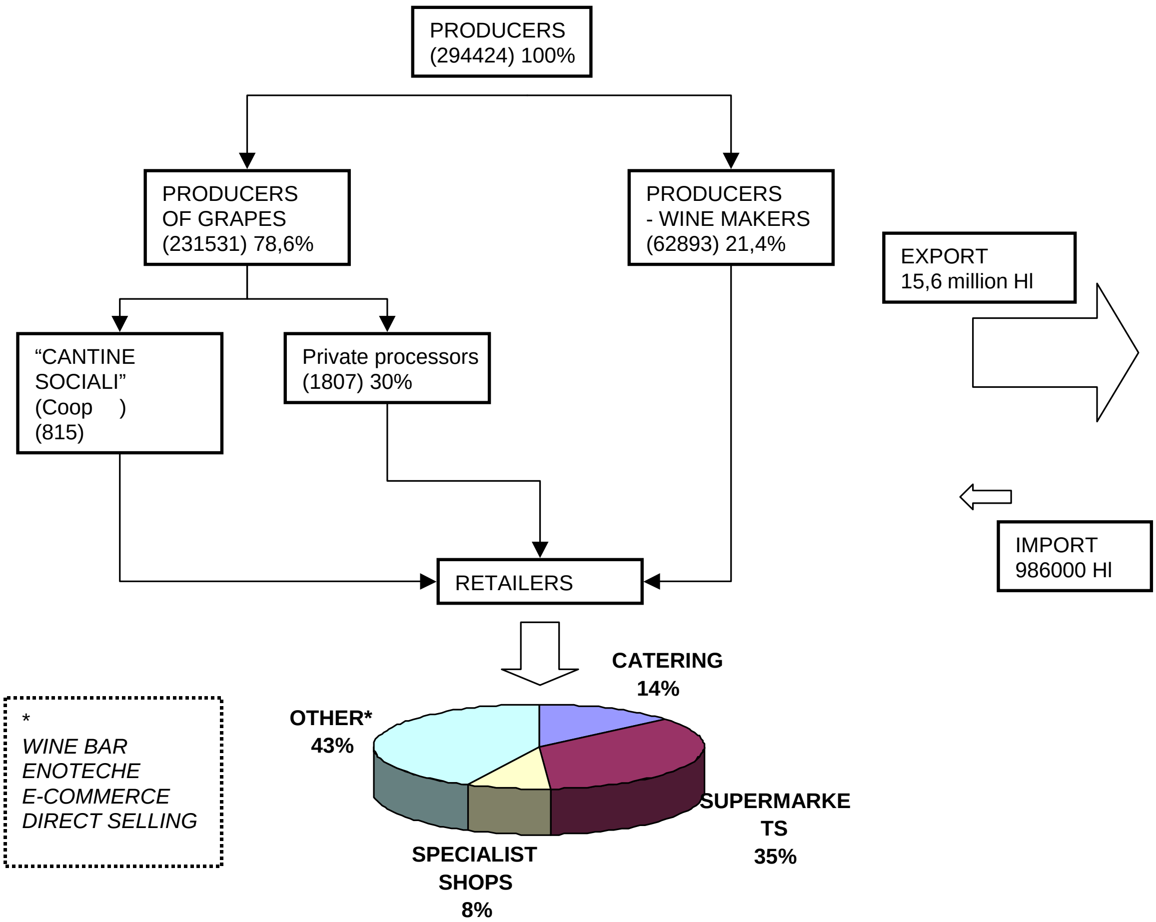
4.6 Bottlenecks within the sector to the further development of those actions identified in point (3) above.

The delay in beginning the conversion to organic production is a consequence of the particularity of this sector. The final production (sugar) is closely linked to an organised but rigid productive supply chain that ends with sugar-refineries. These sugar-refineries have problems to increase the ability of transformation, improving the economy of scale but increasing the rigidity of production. In this context, the conversion to organic, beyond the involved agronomic aspects, must face organisational aspects that are able to guarantee a line of transformation separated from the conventional one.

The bottlenecks for the cultivation of the organic sugar beet are still numerous and go from the organic seed finding, to an effective pest control, to realise a technique of fertilisation for the improvement of the qualitative parameters. Instead an economic valorisation of the product is subordinated to the overcoming of the problems of the process certification by the industry and therefore to the decision to activate specific lines for the organic production.

WINE

4.1 Diagram showing the current structure of the sector



The total gross product value of wine was in 2002 about 6,950 mio euro (source: INEA). In volume terms, the consumption has decreased at a yearly rate of 3%, but in value terms it has increased (about 3,8%) (source: Inea). These figures explain quite well the trend in the industry, which is strongly oriented towards a shift from quantity to quality. Nowadays, wine is the most important export industry in the agro-food sector, with about 15 millions hl exported for 2729 mio euros. During the last years, there has been a relevant growth of the number of farms producing their own wine and selling it directly their wine to consumers or retailers. Nowadays, this group amounts to 21% of the total number of grapes producers. Industrial wine making is for about 70% of cooperative nature, while 30% is by private companies.

4.2 Description of institutions, organisational forms and governance

In Italy the most important organisations of the chain are the Consortia *Volontari di Tutela delle Denominazioni di Origine* and the FEDERDOC (*Confederazione Nazionale dei Consorzi Volontari per la tutela delle denominazioni d'origine*).

UNIONE ITALIANA VINI: it is the oldest association of wine sector. It was born to Milan in 1895 as initiative of a wine traders group with the task to eliminate the customs and the swindles and to become the most important organisation. The rule is assistance and protection activity towards associates. In 1996, in order to answer the new requirements, inside of UIV the *Confederazione Italiana Della Vite e del Vino*was born, as expression of all the entrepreneurial and professional subjects of the wine chain.

The concentration of the production in strongly specialised areas has created an important **background of knowledge** shared to between farms. These relationships are characterised by common traditional productive culture and thickened by an important spread of the cooperation.

Concerning the institutional level we can observe a **lack of** consortia and **inter-professional organisms activity for the protection of the designation of origin**. But the OCM reform creates the normative space for improvement of the relations between the various subjects of the chain (through the inter-professional associations) (INEA 2001).

4.3 Areas of the sector that exhibit dynamism in terms of being sustainable or alternative

Designation of origin: the term "designation of origin" refers to the use of the geographical name of a particularly specialised wine-growing area to indicate a well-known quality product, which owns characteristics related to the natural and human environment in which it is produced (law n. 164 dated 10/02/1992).

Wine may be classified as follows:

- Controlled and guaranteed designation of origin (DOCG);
- Controlled designation of origin (DOC);
- Indication of geographical origin (IGT).

Organic Wine: this sector has recorded a remarkable increment in the last 10 years: in the 1993 there were 867 organic farms, in the 2000 the farms were about 10.000, 4125 of which with wine cellars of organic wine transformation.

Wine Routes: wine routes link local wine producers into common sign-posting and promotion activities, aimed at attracting tourists into the area. The objective, beyond the direct selling business, is to link the image of a wine (normally characterised by a DOC or DOCG label) to its territory. In the setting up of wine routes also local institutions and other producers participate (mainly agro-tourism, olive oil producers, restaurants). In Italy, about 3,5 million people are interested every year to wine tourism, with a business turnover of about 2,5 millions euro (http://www.movimentoturismovino.it).

4.4 Sustainability and transparency and the possible effect of changes identified in (3) above

The sector is highly diverse, including a significant area devoted to **traditional production systems** where vines are grown in areas where other agricultural activities would be difficult or impossible. And they play an important role in **rural economies and landscape maintenance**. However, there are also significant vine growing areas where crops are produced with high levels of inputs, including pesticides, fertilisers and irrigation. The important role of vineyards as landscape features and in preventing soil erosion is a particular feature of some regions.

After important scandals during the ‘80s, the wine sector has restructured itself quite radically, so to become one of the most lively industries. Nowadays an increasing proportion of the total product is under quality schemes (see below).

4.5 As for (4) above, except that the focus should be on rural development

V.P.Q.R.S. Wine: the Italian wine sector slowly develops towards quality productions. This process is very different between the various areas of the country, with the North regions most dynamics.

The total wine production in Italy, during the 1990s was around 55 million hectolitres (hl) (Inea, 2001); DOC-DOCG wines represent approximately a quarter of the total production, while IGT wines represent the 25%; about the half of the total wine production has some shape of qualification.

Within DOC-DOCG productions Piemonte, Veneto and Tuscany alone represent more than 50% of the total production of red wine. Piemonte, Veneto and Lazio concentrate also the half of white production. The IGT production is more concentrated: Veneto, Emilia Romagna and Puglia represent 65% of the total of red wines.

Organic wine: the production of organic wine has also had a very high trend. From 1993 to 1998, in five years, 3.800 hectares, for vine growing, are four times as much reaching 16.400 hectares. In the same period, the value of organic production went from 23 billion lire up to 119 billion.

The industries producing organic wine differ because of a huge quantity of exports (about 55% of the production), so it is a fact that Italian production of organic wine on a large scale satisfies the demands of Germany, Switzerland, United Kingdom and the USA. Most of organic wine is DOC or even DOCG and the companies that produce it usually practice a “healthy” growing system in the whole production share because they are determined to pursue sustainable development.

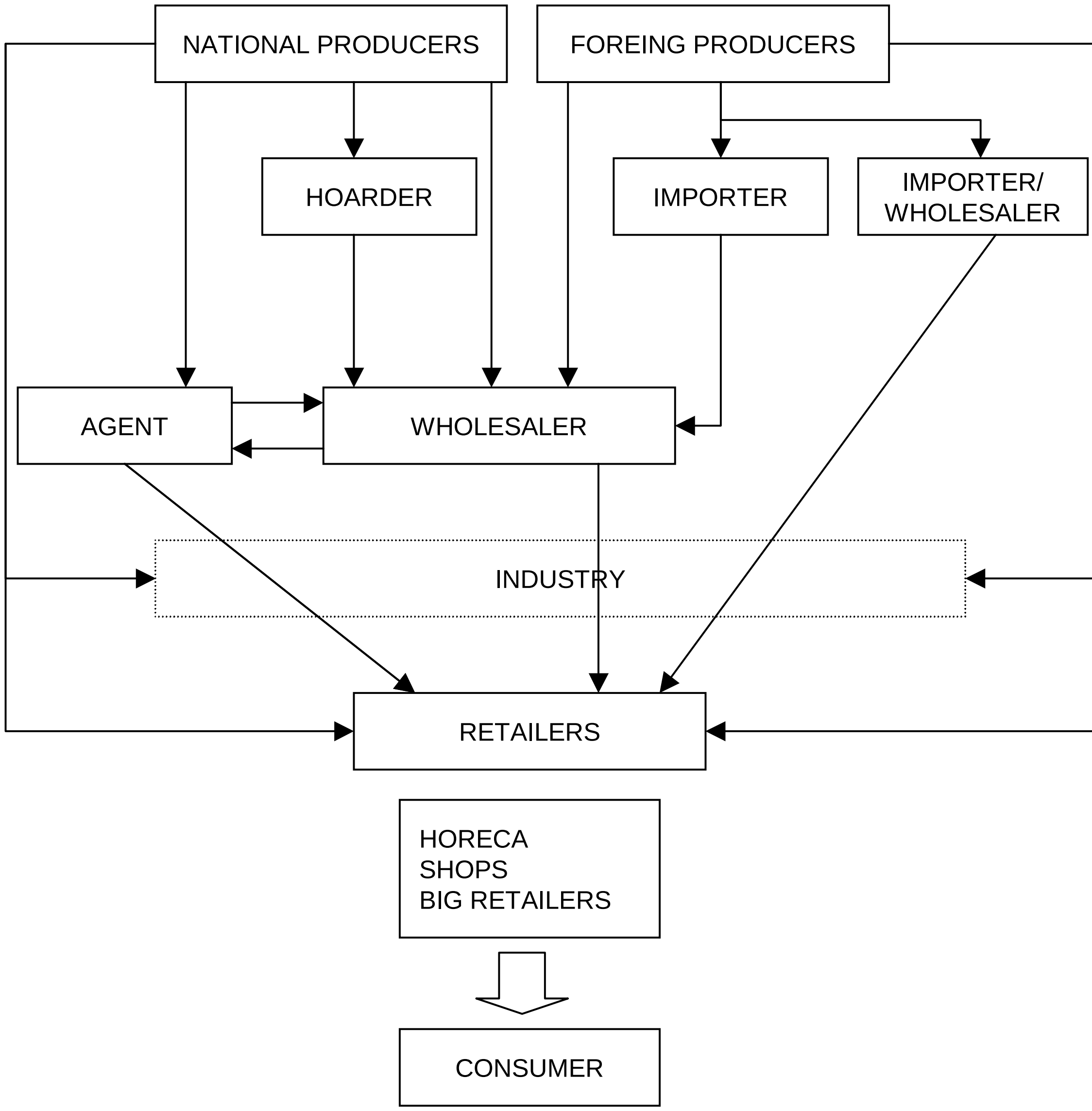
4.6 Bottlenecks within the sector to the further development of those actions identified in point (3) above.

The sector undergoes a progressive qualification process; however this is not homogenous, and without exploiting the differentiation of the products. As regard of that it is possible to underline the importance of improving the horizontal and vertical co-ordination and logistic efficiency of the chain. The **collaboration between production and distribution** is very important because the work of the retailers determine the positioning of the products.

The progressive specialisation towards quality production has been very different between the different areas of the country; the greater efforts for the quality conversion of the production (organic and denomination of origin) happened mainly in the areas of the North-Centre.

AQUACULTURE

4.1 Diagram showing the current structure of the sector



Since 1970 aquaculture has undergone a process of strong development (from 1.000 ton in 1980 to 6.500 tons in 2003) and today it involves about 1.000 producers (15,000 employed) which amount for 22% of the national fishing production (API, 2003). In value terms, Italian aquaculture production in 2003 amounted to around 255 mio euro (Agrisole, 2003).

This positive trend of the last years, also with different characteristics from region to region due to various environmental and economics situations, it is a consequence of the productivity increase of the system. Notwithstanding this trend, the balance between production and consumption is strongly negative, as Italy imports about 70 millions tons.

4.2 Description of the institutions, organisational forms

In this sector, where the production is particularly fragmented, it is very important the aggregation of the operators, in order to concentrate the supply and to define organisational strategies.

The first Italian organisation of aquaculture producers is AMA (*Associazione Mediterranea Acquacoltori*), the creation of which was finalised to give breeders specialised services, such as distribution, marketing and brands. UNIPROM (*Consorzio Promozione Prodotti Ittici*) was constituted in 1995 with the task to promote, to value and protect this sector.

4.3 Areas of the sector that exhibit dynamism in terms of being sustainable or alternative

In the last years the sector has presented the following features:
- The process of optimisation of the productions;
- The attempt to use methods for the product and process qualification;
- The development of new types of product able to compete with the imported fish.

In this context it is possible to identify two areas that exhibit dynamism in terms of sustainability or alternative.

Organic production: it is possible to observe an increasing interest towards organic production, even if there is still a deficiency of information, included specific aspects in matter of environment and marketing. In facts the Reg. (CE) n. 1804/99 (related to animal production obtained with organic methods) does not includes fishing.

To forehead the lack of European or national norms regulating organic production, various studies and researches have been undertaken in Italy. In relation to the latter, an example is UNIPROM: Legambiente and UNIPROM, with the task to prevent the risk of new alimentary emergency, promote the initiative "Organic Fish", a project aimed at setting up a production protocol for the breeding through a certified system.

4.4 Sustainability and transparency and the possible effect of changes identified in (3) above.

Approximately 70 % of the fishing production comes from intensive breeding. The intensive system determines environmental alterations for the direct or indirect introduction of pathogenic agents, synthesis substances and new species of organisms. The intensive breeding, also with an increment of 45% of the production, has always constituted the 25-30% of the total Italian production.

Extensive breeding suffers a reduction, representing a very little part of the total Italian production.

Transparency and traceability:
- At present we can see a development of the production towards new criteria. In fact, the interest of the consumers and especially the emergency of problems related to microbiological contamination, have created the need of certification systems. Fishing products are very perishables and so the consumers raise demands of quality products.
- As regards to legislative activity, the first concrete step is represented by the introduction of the obligatory label from January, 1st 2002. In fact, with the decree of March, 27th 2002, Italy adopted two European directives concerning information to the consumers in matter of the fishing products. Beyond the commercial and scientific denomination of the species, the label aims to put in evidence the production methods and the relative country of origin.
- The API approved a Code of good practice of breeding, finalised to delineate the requirements for a responsible production, with environmental and hygienic respect. The Association is also realising a certification program of product to fill in disciplinary definition of production, in order to reach a quality certification.

4.5 As for (4) above, except that the focus should be on rural development

Acquaculture can be a source of diversification for some farms, also if a limiting factor is availability of clean water.

Initiatives to promote typical fish can create synergies with the efforts to valorise the territory.

4.6 Bottlenecks within the sector to the further development of those actions identified in point (3) above.

At the moment there aren't many certified industries for quality products. The experience of the adoption an origin brand has positive outcomes, but not sufficient for the identification and valorisation of the product (Foraboschi, 2003).

For the retailers the guarantee of traceability is very difficult. In fact, the big retailers must be able to count on solid partnership with production phase, and continuously verify the respect of production disciplinary. But not always the subjects could ensure the complete traceability. Therefore many fishing productions have foreign origin, because of lower prices: in this case the monitoring of the production process and the controls is very difficult.

5. Drivers of change in FSCs in Italy

5.1 Political factors

- a very large consensus among the public and among political parties over the theme of **quality** and **typicality**;
- important role of **regional governments** in defining new rules and providing new opportunities for local/quality products production and distribution;
- important role of local public bodies/agencies in promoting local/quality products production and distribution;
- high influence of **farmers' unions** on the policy agenda, though not decisive as in the past;
- increasing role of **supermarket chains** in defining the quality policies and the consumers' behavior;
- increasing importance of other actors' in affecting the evolution of FSCs: **consumers' organisations** and other **thematic networks** sharing and aimed to consolidate specific values (ethnic, environmental, ethic, etc.) and identities;
- In the consumers' eyes, **origin of production** is strongly **indicative of quality**. Therefore the relationship between locality and quality is central to understand the evolution of the issue and the conflicts arising on it. Firms and territories take competitive advantage from regional hallmark, therefore local actors make local alliances to obtain the recognition for regional products. That implies a long process of **co-ordination between actors of different kind around quality standards** and boundaries of the involved territories for production of raw material and of the final product.
- **Environmental conservation** and, even if still less important, **animal welfare** and **social equity** are other new **consumers' demands** which are strongly affecting the debate and the public and private initiatives in production and distribution of food products. Also in this case, several types of actors are interested and directly engaged, such as consumers' associations, environmental organisations, cultural associations, public bodies, some distribution chains and, though often in a less active-propulsive way, farmers' Unions.

5.2 Economic factors

- High number of **family farms**, long-standing tradition of intensive land management to earn a decent income from small size farms;
- High number of small-medium size and artisan processing companies, financial weakness of some big food companies (Ferruzzi, Cirio, Parmalat);
- **Fast concentration of the retail system**, and increasing use of sustainability criteria to implement differentiation strategies;
- Increased role of brand management by retailers and by the food processors as a factor of trust;
- **Internationalisation** of the food industry (likely repercussions on the system of the Parmalat crisis);
- A 'quality turn' happened in the early '80 when two major food scandals, hormones in beef for childrens' food and methanol in wine, triggered a reaction both in the public sector, which restructured the organization of controls, and in the private sector, which started to endow itself with private certification schemes.
- Most of Italian agricultural regions unfit to the industrialization model: search for **alternative patterns**.
- Perceived crisis of producers into conventional chains for the **price squeeze** and the tendency to concentration
- Increasing demand for quality products and interest for symbolic values attached to food.
- Increased demand on local products generates a **competitive advantage for local producers**. High image of the territory implies a premium price for the products. This, in turn, raises the price of land.

5.3 Social factors

- Destructuration of meals is a still ongoing process. In Italy, as well as most European countries, there is a growth of **eating outside** and consequently of the catering industry.
- **Food culture** is very high and, to a certain extent, growing after a period of crisis. It is uncertain, though, whether young generation are able to embody the interest for food diversity and food quality into eating behaviours.
- New trends in consumers' attitudes open room for **new circuits** tailored to small quantities and high quality and allowing a more efficient communication between farmers and consumers. Groups of buyers, farmers' markets, thematic routes, gastronomic itineraries are among them. Several types of actors participate to the construction of these channels, such as consumers' associations, environmental association, municipalities, local tourist offices, etc. Arcigola Slow food has deeply modified the concept of "valorisation". In some cases, **new circuits are built on old models of interaction** (urban people combining a tour in the countryside to buy food from the producers).
- A renewed interest for agriculture is related to the importance of food for the Italian culture. People is today much more aware than in the past of the link between food and agriculture.
- **Rural tourism** is becoming something relevant from an economic point of view for many areas and regions. A strong movement of people and opinions look in a positive way to rural areas and a strong market is organizing around them.
- Consumers concern about **food safety** is something well known in all EU and the debate on it involve almost all the main actors of Italian agriculture, both at local and national level. The need for a greater responsibility among the different actors implies a strong attention on the **chain relationships** and on **communication** and ***transparency of food processing***.

5.4 Technical factors

- **Hygienic rules** have provoked dramatic changes in the food chains, especially in the beef sector. In 1996, about 2700 abattoirs were shut down in Italy due to the CE regulation. Subsequently, the effort of regional and local administration has allowed to build new abattoirs, also in mountain areas.
- **Technological innovation in the food industry** is putting into **danger** some segments of the high quality food production. Micro-filtered milk devised by Parmalat gives milk a higher shelf life without submitting it to high temperature, and this allows the company to label it 'fresh', a label which so far differentiated producers' driven cooperatives from corporate companies.
- There is a large agreement that GMOs in Italy are harmful for the environment and for the food business. For the environment, coexistence is deemed not applicable to the Italian farming structure, as fields are very small and everywhere there is mixed cropping. For the business, GMOs put into danger the strategy based on local diversity and on the search for premium prices.
- For many niche products, **Internet** represent one of the most suitable way of distribution. In fact, given the small quantities available, a consumer can find it more easily into an Internet site rather than in a retail shop. Moreover, Internet is an important promotion tool for these products and for their producers.
- In remote areas costs of **transportation** are consistently higher. This is a true competitive disadvantage for farmers related to milk collection, to abatement of animals, to product delivery.
- As average **size of farms** is very **small,** many farms have not the dimension enough to allow the **cost of processing or packaging facilities at farm level**. In the wine sector, this problem has been solved by independent mobile bottlers. In practice, all bottling facilities can be contained into a lorry. The farmer can hire the bottling service without moving his-her wine. Similar technical solutions are being looked for in other sectors, such as in the olive oil sector and the dairy sector.

6. Catalogue of FSC initiatives, including cross-sectoral initiatives in Italy

See Annex 1 and Annex 2

Note:
In order to extend the overview of FSC Initiatives in Italy, during the revision of the document some initiatives have been added to the previous ones, i.e. Coop, Consortio Quarantina and Critical Wine. When it was possible, as in the case of "Quarantina" and "Critical Wine", the grid provided by the Swiss has been used at the same time to interview the initiators of the initiatives, so that the most of the answers contained in the grid reflect ideas collected through the interviews. That also explains some peculiarity of those answers, like the objective "political" added by one of the the interviewed.

7. Issues summary in Italy

Institutional changes relating to FSCs and their implications.	Evolution of FSCs is strongly affected by the process of administrative decentralization started with the activation of the Regions in 1972 and with more recent regulations giving local administrations more power. As regional governments can operate through legislation and management of European funds, they can orient production structures according to the specificities of each region. Moreover, there is an increased involvement of local institutions at all levels, including municipalities, especially in the field of promotion of local food and in linking agriculture, food and territory
The identified areas of dynamism within FSCs.	Organic (mainly policy driven) Typical and traditional products Rural and eno-gastronomic tourism.
The relative performance of FSCs on sustainability and transparency, and the significance of emerging initiatives on rural development.	According to many key informants, the performance of the FSCs on sustainability is still low, notwithstanding a certain dynamism in the last years. A food system based upon supermarkets is deemed unsustainable if private transportation costs, infrastructures, waste are included as sustainability indicators. Moreover, the present system put small farmers into danger. More precisely, there is a general recognition of the potential of the food agro-system in Italy, and of the role for some niche products, but at the same time the process of concentration in the retail sector and the poor level of coordination among producers as important points of weakness, as retailers could easily appropriate of the added value of quality products and break the link with rural development. To improve transparency, many initiatives have started in the last years, such as traceability systems and communication and education to consumers. But there are several organizational and technical problems (for example, traceability is very hard to implement when actors are too many and there is institutional overlapping of competencies). Alternative FSCs represent the key to rural development processes in Italian rural areas. They have provided the key initiatives around which rural revitalization of many areas has started.
The significance of SFSCs (short FSCs), and their potential to be scaled up.	Some SFSCs in Italy dominate communication about food, agriculture, rurality. There is a big potential for growth, as the demand for these products is very high. However, many big producers (for example, in the wine and in the olive oil sector) organize themselves to have into their portfolio some short chains to improve their brand image.
The identification of bottlenecks and the opportunities and	Production of sustainable food is carried out in very small units, and in many cases they represent an integrative part of the family income. As their success requires

constraints for enhancing the performance of FSCs.	coordination between a large number of actors at local level, lack of co-ordination and lack of leadership become among the most important bottlenecks. Supermarket chains are interested in sustainable food, but as their main mission is to provide reasonably cheap food to consumers, they tend to impose to farmers a reduction of costs and rationalization of operations. In this way they undermine the ethical motivation at the basis of the movement. Networks of large numbers of small producers can succeed in scaling up their activity when good second level organizations exist (such as promotion consortia).
Stakeholders' perceptions of, and involvement in FSCs, at a variety of scales and the extent to which different perceptions of sustainability and rural development are held by different stakeholder groups within FSCs.	With the opening of policy networks FSCs have become an arena where several actors have been involved. Farmers' organizations, environmentalist associations, cultural associations take now a leading role in making initiatives related to FSCs. Typically, they operate by creating networks around a specific theme, being it a new product, a more sustainable production process, a certification scheme, a new selling pattern, etc.

8. Report on the first SUS-CHAIN National Seminar

The first SUS-CHAIN National Seminar has been held in Italy on December, 16th, 2003, at Florence, Hotel Baglioni, and has been organised by the National Italian partner of the project, the farmers' union *Coldiretti*.

The participants to the seminar, invited by Coldiretti, were around 30: representatives of the Coldiretti itself, other workers' unions, producers' associations, environmental associations, local administrative bodies, retailers, universities and research centres, consumers' associations and various producers.

The seminar has been organised as follows. The President of the Coldiretti and the responsible of agriculture of Toscana region introduced the seminar to the participants, then Prof. Brunori presented the project and illustrated the aim of the seminar in relation to the research within the project.

The seminar has been divided in 6 sessions, along the whole day, during which participants could freely (and anonymously) express their opinions, according to some questions established before. The questions posed to participants are the following:

1. What are the main factors affecting at this moment the development of agro-food systems in Italy?
2. What are the elements that mainly give substance to the concept of sustainability in relation to food production?
3. What is your overall judgement on performance of Italian agro-food system, in relation to sustainability?
4. What are the most significant initiatives towards sustainability in Italian food supply-chains'
5. What are the main obstacles to a significant extension of success experiences in the achievement of sustainable food-supply chains?
6. On what manner and to what extend agro-food policies could benefit the spread of success experiences in the fulfilment of sustainable food supply-chains?

Furthermore, participants were requested to fill in a form containing the same questions that led the sessions of the seminar. Finally, each session of the seminar was introduced by a participant, beforehand requested to prepare a brief reflection on the issue, so that to stand for an "ice-breaker" for the others.

In this report we have tried to combine the discussions related to the questions posed during the Italian national seminar with the issues suggested by the "guideline for reporting" for the seminar protocol. Because the questions we chose are not exactly the same as the issues proposed for reporting, some discrepancy can be found in this report.

8.1 Functioning of FSC in Italy

In relation to this issue participants to the seminar have detected three main areas associated to the functioning of FSC in Italy, whose components are hereby schematically indicated. Because factors affecting the functioning of FSC also mark the major trends in development of FSC, we insert in this paragraph also a brief description of the latter, in relation to the former.

Regulations and policies

- Respect of different national and international regulations. For instance the bad use of agro-environmental measures in Italy.
- EU Community Agricultural Policy (CAP): a problem particularly stressed is the coexistence between GMOs and non-GMOs recently allowed by CAP, which can threat sustainable productions, such as organic.
- Future entrance of new countries in EU: the coexistence of such different countries is also perceived as a possible problem.

Specificity of Italian agro-food system

- Structure of food supply chains: different participants mention the distribution channel as one of the main key factors affecting Italian FSC. A more general question was posed about the use of the term "supply-chain" in agro-food systems, because it usually refers to industrial production and distribution systems, which are based on distance, while it doesn't include small scale or short chains, such as direct selling. The increasing concentration and internationalisation of distribution channels leads towards an oligopoly structure of the sector, where small producers and retailers can hardly compete. The large distribution companies recently absorbed also some niche products, before found only in small shops, such as quality and territorial products, and improved their performance on fresh products; furthermore the use of quality brands helped these big companies to offer consumers the guarantee of quality they could find before only in the direct contact with the small producer or retailer.
- Structural inadequacy of: organisation of enterprises in respect to the changes and new demands of food supply chains; lack of appropriate research and training; consortia of producers dealing with distribution powers.
- Food production and consumption: quality and typical products are deeply embedded in Italian food culture, so as consumption of fresh products; there has been traditionally a richness in local autochthon varieties of plants and races of animals. Moreover it has been observed that if territory is an added value of the product, not all the products can display that feature.

Supply-demand dynamics

- First of all: is demand affecting supply or the other way around? One opinion is that either we accept discontinuity between production and distribution, or producers will have to follow the globalisation and concentration trend followed by distribution companies. Another opinion is that it depends on the agriculture policy we support, because there is also the possibility that public policies support small producers, so they can compete with big distribution companies. The problem arises for example in the case of "organic canteens", where there is a lack of supply of organic produce.
- Changing attitude of consumers: consumers demand of "ecological compatibility" is at the same time the need of healthy food, but on the other side consumers' request of quality goes together with their distrust towards supply chains. Therefore it is needed to find a shared framework among different actors around quality, in order to face the crisis of consumers' trust. Nevertheless income dynamics lead more and more consumers, in spite of their request of quality produce, to purchase in discount supermarkets, where they can find cheaper goods.
- Different aspects of communication have been indicated: the danger of misleading communication in advertising, the lack of communication in "training/education" of consumers, the importance of communication for re-orient intervention policies.

8.2 Major trends in development of FSC

As a consequence of the main factors affecting FSC in Italy according to participants, it is possible to state that, major trends of development of FSC are related to:

- Growing distance between production and consumption: industrialisation process has brought a disconnection between urban and rural areas, nowadays partially recovered by rural tourism.
- Supremacy of distribution "ring" within the supply-chains.
- Influence of rules and regulations.
- Increasing sensitiveness of consumers to health and quality issues, but at the same time problems to fully approach quality produce because their lack of trust and decreasing incomes.
- Difficulty of building new networks among small producers/retailers within the supply chain.
- Importance of communication and auto-referentiality of reflection on previous experiences

8.3 New Initiatives and developments towards sustainable food chains

A significant part of the seminar has been spent on defining what sustainability is (or should be), and in what direction it is necessary to direct our efforts in order to build and evaluate sustainability. Because this general issue gives the framework to the discussion about what new initiatives mark the development towards sustainability, we address it before describing what examples of initiatives participants have brought.

Core elements of sustainability

Ecological/Environmental sustainability:

- Agricultural use of resources in a renewable/reversible way;
- Clear distinction between integrated and organic agriculture reflected by law;
- Management of agricultural power of landscape transformation;
- Biodiversity redistributed on territory and not of exclusive property;
- GMOs. When co-existence with non manipulated organisms is permitted, sustainability can hardly be achieved;
- Maintenance of organolepctic features of produce;
- Importance of the place and methods for producing in a sustainable way: i.e. big supermarkets built with hard environmental impact, problem of waste and packing;
- Environmental sustainability is the base to which the other kind of sustainability refer, because environmental sustainability so far still doesn't exists, that should be built before thinking about economical sustainability (for example so far there has been no research about how to keep fertility without using chemical matters,
- Importance of unsustainability of most means of transport;
- Food-sustainability;
- Use of alternative sources of energy.

Economic sustainability:

- Environmental sustainable breedings, such as organic, have been constructed on the dependence of farmers from subsidies, and this is not sustainable on the economic point of view;
- Difficulty of reaching the "critical mass" in sustainable production, such as organic;
- Farming, as an economic activity, also affects environment and landscape, it would be a success if farmers could plan the effects of their activity on territory as they do for their economic activity;
- Imp. To combine a stiff idea of sustainability with entrepreneurial activity;
- Competitive sustainability: if the product origin is indicated consumers are able to make a more aware choice;
- Fair income for farmers.

Socio-territorial sustainability:

- Knowledge: in the last decades there has been a great evolution in farmers' awareness, but many of them have to learn again sustainable methods, therefore there is the issue of reproduction of knowledge;
- Stability of mankind on the territory in balance with environment;
- Importance of diversity in sustainable "alternative" supply-chains;
- Sustainability = constantly reproducible system;
- Importance of training and education;
- Communication;
- Good example is Fair Trade;
- Respect of local level.

Some participant stress that a broadening of the concept of sustainability should not put into discussion the primary aspect, which is ecological sustainability. Other participants underline the emerging contradictions, such as globalized organic food, and question whether is more sustainable a local product cultivated with Integrated production or an organic product coming from New Zealand.

Building sustainability

In order to create and evaluate sustainability participants have detected the importance of:

- Interdisciplinary approach;
- Referring to a model of development;
- Means for evaluation of sustainability;
- Length of supply chains: the short supply chains are more sustainable because they are more related to territory and biodiversity;
- Traceability;
- Understand whether society desire sustainability, because that is taken for granted;
- To measure sustainability through indicators;
- To communicate importance of sustainability to all actors without make it a further harassment;
- To connect sustainable agricultural practices with other environmental aspects, such as climate change.

Significant initiatives towards sustainability

General trends towards sustainability and impediments:

Talking about performance of sustainable initiatives in Italy diverse opinions arose around the issue, so that conventional production/consumption initiatives have been sometimes judged developing towards sustainability, sometimes completely insufficient compared with the transformation the agro-food system has gone through. Some examples are hereby exposed:

- Reduction of chemical inputs in agriculture: pesticides reduced of 50% compared with 10 years ago, plant protection products are 10% in respect of 10 years ago, fertilizers are 50% of organic matter.
- Technology innovation: mechanisation allows a higher compatibility (i.e. sustainability), because it brings about accuracy and control of weed killers in agriculture.
- Also conventional agriculture developed towards sustainability, i.e. traceability.
- Both (small) producers and consumers are often too weak to have power within the chain: consumers don't understand their responsibility and power of change embedded in their act of purchasing, while they are not guaranteed against traceability and misleading advertising, because of the lack of control and transparency in communication.
- De-population and erosion of social networks in rural areas.
- Difficulties of adapting to hygienic rules:
- Lack of effective policies.

Relevant initiatives towards sustainability

N.B. This issue obviously led participants to refer to initiatives launched by organisations they belong to.

- Policies of Tuscany Region on: organic agriculture, integrated agriculture, such as the "agro-quality" brand on cereals, which from 2004 on will be extended to fruits and vegetables, meat and floriculture, and it will indicate also the origin the raw matter; L.R. 1997 on autochthon "germoplsma" of Tuscany, which can lead in the future to the possibility of allowing all subjects part of the "germoplsama" network to exchange seeds (now it is forbidden).
- Small organic markets (*Fierucola*): buyers are not only clients and consumers, they establish a real relationship with producers, so that some producers have been also stimulated by their buyers develop new products.
- CAP (*Provincial Agrarian Consortium*): they worked for developing techniques with low environmental impact, to salvage ancient varieties of plants and create new ones, to support organic agriculture, without disconnecting from conventional agriculture, which has positively evolved too, for example towards traceability.
- "Mukki" brand (*Centrale del Latte di Firenze, Pistoia e Livorno*, public company): capacity to adapt the company to the changing competitiveness of international markets, so to keep the link between large distribution channels and small producers, while also maintaining quality standard. >>> See also Annex 2 of National Report on Initiatives.
- *Forteto Cooperative*: reward for small producers by linking production to local markets, research for alternative sources of energy. >>> See also Annex 2 of National Report on Initiatives.
- *COOP* (large supermarket chain): quality brands on cereals supply chains and meat (*carni con amore* brand). >>> See also Annex 2 of National Report on Initiatives.

8.4 Drivers of change in FSC

- Food retailing concentration and brand management.
- Changing attitude of consumers, their increased attention to food safety and sustainability, which can be leveraged to promote change at all levels of the chain.
- Agricultural policies. Apart from CAP reform and EU enlargement, a major issue debated is GMOs regulation. All agree that the possibility for GMOs to be cultivated can change totally the possibilities of development of alternative chain, as at least in the Italian context no coexistence is deemed possible.
- Safety and Hygiene rules. It has been put into light that some technical rules halt the possibilities of development of alternative chains, such as olive oil packaging rules.
- Active intervention of local administrative bodies in order to facilitate sustainable initiatives;
- Initiatives promoting direct contact between producers and consumers.
- Communication and education, especially regarding the link between food and health

8.5 Outcomes of the seminar

All participants expressed their satisfaction for the quality of the debate, and their interest to keep in touch with the developments of the project.
The seminar has shown a large agreement among the participants:

- on the need to scale up sustainable chains;
- on the need not to take for granted the concept of sustainability applied to the food system; as it changes together with the evolution of the initiatives which put it into practice, it should take into account the emerging contradictions and problems.
- on the need to introduce in the common knowledge easily understandable sustainability indicators and to upgrade them constantly along with the increased ecological awareness of the stakeholders;
- on the importance of agricultural policies, both in terms of support measures and of technical norms and standards;
- on the role of consumers as active players in shaping sustainable food chains;
- on the role of communication, education, technical assistance;
- on a need to improve communication between producers and consumers;

The seminar has had a rather large media coverage in Tuscany, with a story on the TV news. As Coldiretti is the biggest farmers' organisation in Italy, it can be said that the themes emerging from the seminar will have a big impact on the Italian policy networks.

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20. LE VIE DELLA PASTORIZIA, PER LA RISCOPERTA, A PASSO D'UOMO, DEL NOSTRO TERRITORIO 62

21. IL PAGLIAIO, "FIERUCOLA" OF ORGANIC PRODUCTS 65

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27. BIOMENSE (ORGANIC CANTEENS) 84

Database of Sustainable food supply chains initiatives (WP2)		
O - General Information		
a. Name of the Initiative	***1. Biodomenica*** **(Biosunday)**	
b. Type of Products	Organic food products	
A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
main actors of the "new" food supply chain		
a. How many producers are involved	Hundreds	
b. What is the farms' size	Small-medium size, average: 10 ha	
c. Who is the main initiator *(put a "x" in front)*	*	Producers' associations [Coldiretti]
		First processors or packers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
	*	Environmental associations [Legambiente]
	*	Other associations [aiab]
d. Describe in a few sentence the main initiator	Legambiente is a nation-wide environmental association, born in the left-wing political environment. It is articulated into regional, privincial and local units across Italy. Thanks to its very good diffusion on the territory, it has a high visibility both at national and local level, with a strong capacity of lobbying. It has grown very much during the '80 with the anti-nuclear campaing, Nowadays it operates on a wide range of issues, among which pesticides regulation, sea pollution, food safety, etc.	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
		Regional
	*	National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	The initiive is held in the most important italian towns.	
➢ **Size of production**		
a. Tons		
b. Value at consumer level		
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*		Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*		Producers' association
		Cooperative
		Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organisation
		Regional public institution (label)
		National public institution
		Other (to be specified):AIAB, Coldiretti, Lega ambiente

c. describe in few sentences the operation structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing….	The iniziative is mainly aimed at promoting sustainable food production and to give visibility to farmers vis a vis the consumers. It consists of farmers' fairs organized in the same day of the year, (generally may or june) in many italian towns. During the fair, farmers show and sell their organic and typical products.	
3- Social history of the initiative		
➢ **Birth**		
a. When?	2000	
b. Who?	Legambiente together with Coldiretti (farmers' organization) and AIAB (*Italian Association for Organic Agriculture*, cultural association promoting organic agriculture)	
c. Where?	About 100 towns in Iitaly	
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*		
a. Order to put a number in front	1	Environmental
	2	Soci-territorial
	3	Economic
b. Please precise these first motives, objectives and start difficulties	To favour the encounter and communication between farmers, citizens and associations operating in the fields of consumer rights, environmental defence, sustainable development.	
➢ **Main historical key events until now**		
a. Precise the main events in the history of the initiative	The initiative has broadened its scope from the first edition, held in 2000. In fact, from the third edition the initiators have set up a forum of discussion on the Web, which can anticipate and follow up the event, and a series of debates during the main event in some of the towns involved in the initiative.	
➢ **Future: main plans and intentions & bottlenecks**		
a. Describe the key ambitions, challenges in sustaining the initiative	The initiatives is collecting more and more adhesions and sponsorships (one of the most important is Corriere della sera, the biggest Italian newspaper). One connected initiative is 'open farms' in which farms open their gates to visitors.	
b. Describe the main bottlenecks	To be assessed	
4 - Marketing issues		
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*	2	Direct selling
	1	Farmers' markets
		Specialised stores
		Big retailers
		Restaurants
		Other (to be specified): E-commerce
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*		Local
		Regional
		National
		European
		International

c. How are the products labelled *(many answers possible, put a "x" in front and give the name of the label)*		Private label	Name:
		Collective brand	Name:
		Regional label	Name:
		National label	Name:
	*	European label	Name: Organic

B- Sustainability profile		
a. Put a "x" in front of items presented by initiative's actors themselves through websites, flyers, promotion events.	**Agri-enviromental**	
	*	Biodiversity
	*	Preservation of specific species/races
		Soil erosion
		Water quality
		Animal welfare
		Food-miles
		Other important aspects (to be specified):……….
	Socio-territorial	
	*	Regional employment an preservation of rural communities
	*	Food quality and typicity
		Preservation of landscapes
		Mountain (marginal) areas keeping
		Resistance to sprawl
	*	Agri tourism
		Other important aspects (to be specified):……….
	Economic	
	*	Producers' income
		Possible succession for farms
		Farmers' quality of life
		Higher net value per unit of product
		Higher net value added on regional level
	*	Other important aspects (to be specified):………. Higher visibility for farmers
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)		
C- Institutional support		
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*	3	Local
	2	Regional
	4	Sector
	1	National
		European
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc…. (and opposition?)	Promotori dell'iniziativa: Aiab, Coldiretti, Lega ambiente: organizational support Corriere della sera: ICEA, Lifegate, Vita *magazine*: communication on the mass media Private enterprises: financial support	
c. Describe institutions and regulations created by the initiative?		

Database of Sustainable food supply chains initiatives (WP2)		
O - General Information		
a. Name of the Initiative	***2. Marchio Consorzio di tutela dei prodotti pastorali dei parchi d'Abruzzo***	
b. Type of Products	Organic products: cheese, sheep cheese, beef, oil, wine, pasta, honey and so on	
A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	A lot of producers located in Abbruzzo's Park (150 municipalities)	
b. What is the farms' size	Small-medium size, average: 10 ha	
c. Who is the main initiator *(put a "x" in front)*	*	Producers
		First processors or packers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
		Other associations
d. Describe in a few sentence the main initiator	Consortium "Parco Produce" for the protection of agricultural and pastoral products in the parks of abruzzo and cheese production with biological certification	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
	*	Regional
		National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	National and Regional parks of Abruzzo. The environment, in this region, has always been considered as one of the most important resources and now it can boast the name "Europe's Green Region" thanks to its three national parks (Gran Sasso, Abruzzo, Maiella – Morrone), the regional park of Sirente – Velino, and ten or so natural parks and protected areas combined together to make about 1/3 of the territorial region of 10.794 kms squared	
➢ **Size of production**		
a. Tons	Data not available	
b. Value at consumer level	The prices of the products with the Park label are high	
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*	*	Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*		Producers' association
		Cooperative
	1	Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)

		Certification organisation
		Regional public institution (label)
		National public institution
		Other (to be specified):
c. describe in few sentences the operation structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing....	The "Consorzio tutela dei prodotti pastorali dei parchi d'Abruzzo" was born to guarantee the typical products made through organic methods The "Consorzio Parco Produce" is a Consortium of seven farms (located in National park of Majella and in National Park of Abruzzo) which uses organic methods and utilizes the Park label	
3- Social history of the initiative		
➢ **Birth**		
a. When?	1996.	
b. Who?	"Consorzio tutela dei dei prodotti pastorali dei parchi d'Abruzzo"	
c. Where?	Abruzzo's Park	
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*		
a. Order to put a number in front	3	Environmental
	2	Socio-territorial
	1	Economic
b. Please precise these first motives, objectives and start difficulties	The Consortium was born to guarantee the typical products made through organic methods	
➢ **Main historical key events until now**		
a. Precise the main events in the history of the initiative	Birth of the Consortium and predisposition of the label	
➢ **Future: main plans and intentions & bottlenecks**		
a. Describe the key ambitions, challenges in sustaining the initiative	Valorisation and promotion of the products on new markets	
b. Describe the main bottlenecks		
4 - Marketing issues		
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*	1	Direct selling
		Farmers' markets
		Specialised stores
		Big retailers
	2	Restaurants
		Other (to be specified):……….
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*	2	Local
	1	Regional
		National
		European
		International

c. How are the products labelled *(many answers possible, put a "x" in front and give the name of the label)*		Private label	Name:
	*	Collective brand	Name: "Marchio Consorzio di tutela dei prodotti pastorali dei parchi d'Abruzzo"
		Regional label	Name:
		National label	Name:
		European label	Name:
B- Sustainability profile			

a. Put a “x” in front of items presented by initiative’s actors themselves through websites, flyers, promotion events.	**Agri-enviromental**	
		Biodiversity
	*	Preservation of specific species/races
		Soil erosion
		Water quality
	*	Animal welfare
		Food-miles
		Other important aspects (to be specified):……….
	Socio-territorial	
	*	Regional employment an preservation of rural communities
	*	Food quality and typicity
		Preservation of landscapes
	*	Mountain (marginal) areas keeping
		Resistance to sprawl
		Agri tourism
		Other important aspects (to be specified):……….
	Economic	
	*	Producers’ income
		Possible succession for farms
		Farmers’ quality of life
	*	Higher net value per unit of product
	*	Higher net value added on regional level
		Other important aspects (to be specified):……….
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)		
<u>C- Institutional support</u>		
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*	1	Local
		Regional
		Sector
		National
		European
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc…. (and opposition?)	The Consortia made and recorded the brand	
c. Describe institutions and regulations created by the initiative?	Disciplinary of the brand	

Database of Sustainable food supply chains initiatives (WP2)		
<u>O - General Information</u>		
a. Name of the Initiative	***3. Shortening the beef chain in Emilia Romagna***	
b. Type of Products	Organic meat	
<u>A- Organisation and governance of the "new" supply chain</u>		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	Data not available, because the project still isn't started	
b. What is the farms' size	Madium- big- scale farms (average 19 ha)	
c. Who is the main initiator *(put a "x" in front)*	*	Producers' association
		First processors or packers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
		Other associations
d. Describe in a few sentence the main initiator	*Coldiretti*, narrowly linked to the centre-catholic party and, until the middle of the '90s, to the big economic-political power of Federconsorzi, and representing the small family farms	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
	*	Regional
		National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	Emilia Romagna Region	
➢ **Size of production**		
a. Tons	Data not available	
b. Value at consumer level	Trough the shortening of the chain it is possible to lower the final prices	
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*	*	Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*	1	Producers' association
		Cooperative
		Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organisation
		Regional public institution (label)
		National public institution
		Other (to be specified):……….
c. describe in few sentences the operation	The mission of the Association includes: – To promote the initiatives of improvement valorisation and spread of bovine	

structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing….	rare breeds – Genetic improvement – Diffusion of technical articles through specialised press – Collaboration with Universities and Research Centres – Technical assistance to farmers		
3- Social history of the initiative			
➢ **Birth**			
a. When?	2003		
b. Who?	Coldiretti Piacenza		
c. Where?	Emilia Romagna		
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*			
a. Order to put a number in front		Environmental	
		Soci-territorial	
	1	Economic	
b. Please precise these first motives, objectives and start difficulties	The goal is to short the chain from producer to consumer trough the premium price of organic production		
➢ **Main historical key events until now**			
a. Precise the main events in the history of the initiative			
➢ **Future: main plans and intentions & bottlenecks**			
a. Describe the key ambitions, challenges in sustaining the initiative	To spread the e-commerce		
b. Describe the main bottlenecks			
4 - Marketing issues			
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*	1	Direct selling	
		Farmers' markets	
		Specialised stores	
		Big retailers	
		Restaurants	
		Other (to be specified):……….	
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*	1	Local	
	2	Regional	
		National	
		European	
		International	
c. How are the products labelled *(many answers possible, put a "x" in front and give the name of the label)*		Private label	Name:
		Collective brand	Name:
		Regional label	Name:
		National label	Name:
		European label	Name:
B- Sustainability profile			
a. Put a "x" in front of items presented by initiative's actors themselves through websites, flyers, promotion events.	**Agri-enviromental**		
		Biodiversity	
		Preservation of specific species/races	
		Soil erosion	
		Water quality	
		Animal welfare	
		Food-miles	

		Other important aspects (to be specified):……….
	Socio-territorial	
		Regional employment an preservation of rural communities
		Food quality and typicity
		Preservation of landscapes
		Mountain (marginal) areas keeping
		Resistance to sprawl
		Agri tourism
		Other important aspects (to be specified):……….
	Economic	
	*	Producers' income
		Possible succession for farms
		Farmers' quality of life
		Higher net value per unit of product
	*	Higher net value added on regional level
		Other important aspects (to be specified):……….
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)		
<u>C- Institutional support</u>		
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*	1	Local
	2	Regional
		Sector
		National
		European
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc.... (and opposition?)	The Coldiretti is the promoter of this project, while the Association has to occupy of the management.	
c. Describe institutions and regulations created by the initiative?		

Database of Sustainable food supply chains initiatives (WP2)		
O - General Information		
a. Name of the Initiative	***4. "From the mountain to the table": the traceability system for the Canaveis cheese.***	
b. Type of Products	Typical cheese Canaveis.	
A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	Data not available, the project is still under research	
b. What is the farms' size	Medium size	
c. Who is the main initiator *(put a "x" in front)*		Producers
		First processors or pakkers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
	*	Other associations
d. Describe in a few sentence the main initiator	Councilor's office of the mountain (Assessorato alla montagna) promoter of this initiative, purposes to valorise the mountain products.	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*	*	Local
		Regional
		National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	Alpine Regions of Piemonte, areas characterized by strong tourist act ration	
➢ **Size of production**		
a. Tons		
b. Value at consumer level	Higher prices compared to conventional products for the traceability assurance	
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*		Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*		Producers' association
		Cooperative
		Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organisation
		Regional public institution (label)
		National public institution
	1	Other (to be specified): University of Torino "Dipartimento di georisorse e territorio del politecnico di Torino"
c. describe in few sentences the operation	The department is an University structure, that develop research activity about environmental and territorial systems	

structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing….		
3- Social history of the initiative		
➢ **Birth**		
a. When?	2003	
b. Who?	Councilor's office	
c. Where?	Piemonte.	
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*		
a. Order to put a number in front		Environmental
	2	Soci-territorial
	1	Economic
b. Please precise these first motives, objectives and start difficulties	The goal of project is to elaborate a traceability system for the Canaveis cheese and to increase the value of the milk and so to improve the quality of life of resident producers	
➢ **Main historical key events until now**		
a. Precise the main events in the history of the initiative		
➢ **Future: main plans and intentions & bottlenecks**		
a. Describe the key ambitions, challenges in sustaining the initiative	To realize this project of traceabilty system and to extend to other products	
b. Describe the main bottlenecks		
4 - Marketing issues		
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*	1	Direct selling
	2	Farmers' markets
		Specialised stores
		Big retailers
	3	Restaurants
		Other (to be specified):……….
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*	1	Local
	2	Regional
		National
		European
		International
c. How are the products labelled *(many answers possible, put a "x" in front and give the name of the label)*		Private label — Name:
		Collective brand — Name:
		Regional label — Name:
		National label — Name:
		European label — Name:
B- Sustainability profile		
a. Put a "x" in front of items presented by initiative's actors themselves through websites, flyers, promotion events.	**Agri-enviromental**	
		Biodiversity
	*	Preservation of specific species/races
		Soil erosion
		Water quality

		Animal welfare
		Food-miles
		Other important aspects (to be specified):……….
	Socio-territorial	
	*	Regional employment an preservation of rural communities
	*	Food quality and typicity
		Preservation of landscapes
		Mountain (marginal) areas keeping
		Resistance to sprawl
		Agri tourism
		Other important aspects (to be specified):……….
	Economic	
	*	Producers' income
		Possible succession for farms
		Farmers' quality of life
	*	Higher net value per unit of product
		Higher net value added on regional level
		Other important aspects (to be specified):……….
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)		
<u>C- Institutional support</u>		
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*	1	Local
	2	Regional
		Sector
		National
		European
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc.... (and opposition?)	The Councillor's office presented the results of the studies conducted by University of Turin	
c. Describe institutions and regulations created by the initiative?	At present nothing	

Database of Sustainable food supply chains initiatives (WP2)		
O - General Information		
a. Name of the Initiative	***5. Linea di prodotti dei supermercati Carrefour: filiera di qualità e Terre d'Italia***	
b. Type of Products	Quality and typical products	
A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	Data not available	
b. What is the farms' size		
c. Who is the main initiator *(put a "x" in front)*		Producers
		First processors or pakkers
		Trade/wholesalers
		Independent stores
	*	Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
		Other associations
d. Describe in a few sentence the main initiator	Carrefour is a international chain of supermarkets	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
		Regional
	*	National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	National territory	
➢ **Size of production**		
a. Tons	Data not available	
b. Value at consumer level	Fair price	
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*		Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*		Producers' association
		Cooperative
		Consortium or FSC collective private structure without any commercial activity
	*	Channel captain (processing firm, big retail)
		Certification organisation
		Regional public institution (label)
		National public institution
		Other (to be specified):
c. describe in few sentences the operation	Carrefour Carrefour is the biggest European retailer company, second largest worldwide	

structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing….	with more than 9200 stores in 30 countries and 383,000 employees. Carrefour operate in Italy through three different leading formats: hypermarkets, supermarkets and hard discount		
3- Social history of the initiative			
➢ **Birth**			
a. When?	2002		
b. Who?	Carrefour		
c. Where?	Italy		
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*			
a. Order to put a number in front		Environmental	
		Soci-territorial	
	*	Economic	
b. Please precise these first motives, objectives and start difficulties	The goal is the research of foods that are able to remind the origin and the traditions.		
➢ **Main historical key events until now**			
a. Precise the main events in the history of the initiative	The project “filiera di qualità” is based on three phases of control: ▪ Protect environment ▪ Constant control ▪ Genuineness and authenticity Trough the brand “Terre d’Italia” Carefour would valorise the local gastronomy and the development of small farms		
➢ **Future: main plans and intentions & bottlenecks**			
a. Describe the key ambitions, challenges in sustaining the initiative			
b. Describe the main bottlenecks			
4 - Marketing issues			
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*		Direct selling	
		Farmers’ markets	
		Specialised stores	
	*	Big retailers	
		Restaurants	
		Other (to be specified):……….	
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*		Local	
		Regional	
	*	National	
		European	
		International	
c. How are the products labelled *(many answers possible, put a “x” in front and give the name of the label)*	*	Private label	Name:Terre d’Italia
		Collective brand	Name:
		Regional label	Name:
		National label	Name: Terre d'Italia
		European label	Name:
B- Sustainability profile			
a. Put a “x” in front of items presented by initiative’s actors themselves through	**Agri-enviromental**		
		Biodiversity	
		Preservation of specific species/races	

websites, flyers, promotion events.		Soil erosion
		Water quality
		Animal welfare
		Food-miles
		Other important aspects (to be specified):……….
	Socio-territorial	
		Regional employment an preservation of rural communities
	*	Food quality and typicity
		Preservation of landscapes
		Mountain (marginal) areas keeping
		Resistance to sprawl
		Agri tourism
		Other important aspects (to be specified):……….
	Economic	
		Producers' income
		Possible succession for farms
		Farmers' quality of life
	*	Higher net value per unit of product
		Higher net value added on regional level
		Other important aspects (to be specified):……….
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)	It is to be questioned whether the farmers gain from this initiative	
<u>C- Institutional support</u>		
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*		Local
		Regional
		Sector
		National
		European
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc.... (and opposition?)		
c. Describe institutions and regulations created by the initiative?		

Database of Sustainable food supply chains initiatives (WP2)		
O - General Information		
a. Name of the Initiative	***6. Carta di qualità del Parco Nazionale delle Dolomiti Bellunesi***	
b. Type of Products	Typical products of the park	
A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	9 farms located in the park	
b. What is the farms' size	Small dimension	
c. Who is the main initiator *(put a "x" in front)*		Producers
		First processors or packers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
	*	Other associations
d. Describe in a few sentence the main initiator	Park Authority is a public body, whose activity is regulated by the Act n. 394/1991 (preserved areas). The Park attends to all activities of local and national promotion.	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
	*	Regional
		National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	"Parco Nazionale Dolomiti Bellunesi, Belluno, Veneto". The western area, the one of the real Vette, is characterized by grassy summits (the most famous is Mount Pavione pyramid, 2335 m.) and large stratum drifts, glacial cirques and karstic hollows. You can reach them from the hills (Croce d'Aune, Col dei Mich, San Martin valley) along steep paths going up abrupt but very interesting slopes, with environments reminding of the landscape of the foothills of the Alps. Cimonega group presents the typical Dolomite characteristics, with its highest top, Sass de Mura (2550 m.). You can reach it from the deep Val Canzoi, starting point of visits to Erera-Brendol plateau and Piani Eterni as well, in the eastern part of Alpi Feltrine. Piz zocco and Agnelezze groups have characteristics of both the Dolomites and the foothills of the Alps. Monti del Sole (on both sides, Mis and Cordevole) form the wild heart of the Park. They are almost unscalable and they seem to be a sort of sanctuary where man has no power on nature. At low altitudes you can already admire a spectacular landscape riminding of the eastern Alps: deep gorges, narrow drift canals, small waterfalls, steep ridges and sharp projecting rocks, woody crags . On the Belluno side as well, the imposing Dolomite walls (like Burel della Schiara) and grassy summits (Monte Serva) alternate. The beautiful Cajada depression forest and the grassy and rocky "glacis" of the Talvéna group are really remarkable. Finally, the fresh sides on the right bank of the Maé stream (Pramper valley and Grisol Valley). They are typical of the most internal Dolomites and are completely different from the dry and abrupt slopes you can observe going up the Piave Valley between Ponte nelle Alpi and Longarone. Inside the Park there are also two artificial lakes, Mis lake and La Stua lake in Val Canzoi	

➢ **Size of production**		
a. Tons	Data not available	
b. Value at consumer level	Higher prices compared to conventional products	
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*	*	Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*		Producers' association
		Cooperative
		Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organisation
		Regional public institution (label)
		National public institution
	1	Other (to be specified): Ente Parco.
c. describe in few sentences the operation structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing....	The Park set up a code of practices for the production trough environmental friendly methods of high quality products. The producers have to make a request for the use of the brand. The Park Authority verifies the conformity with the code of practices and then it authorizes the use of his label.	
3- Social history of the initiative		
➢ **Birth**		
a. When?	2001.	
b. Who?	Park Authority	
c. Where?	"Parco Nazionale delle Dolomiti Bellunesi, Belluno, Veneto".	
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*		
a. Order to put a number in front	3	Environmental
	2	Soci-territorial
	1	Economic
b. Please precise these first motives, objectives and start difficulties	The "quality card" needs for a socio-economical promotion of the territory and it has two important functions: to guarantee quality to tourists and to promote the operators of this area.	
➢ **Main historical key events until now**		
a. Precise the main events in the history of the initiative		
➢ **Future: main plans and intentions & bottlenecks**		
a. Describe the key ambitions, challenges in sustaining the initiative		
b. Describe the main bottlenecks	Being a public body the initiatiors, there is the risk of lack of motivation by the farmers	
4 - Marketing issues		
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*	1	Direct selling
		Farmers' markets
		Specialised stores
		Big retailers
	2	Restaurants

		Other (to be specified):……….	
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*	1	Local	
		Regional	
		National	
		European	
		International	
c. How are the products labelled *(many answers possible, put a "x" in front and give the name of the label)*		Private label	Name:
		Collective brand	Name: 'quality card of the park'
		Regional label	Name:
		National label	Name:
		European label	Name:
<u>B- Sustainability profile</u>			
a. Put a "x" in front of items presented by initiative's actors themselves through websites, flyers, promotion events.	**Agri-enviromental**		
	*	Biodiversity	
		Preservation of specific species/races	
		Soil erosion	
		Water quality	
		Animal welfare	
		Food-miles	
		Other important aspects (to be specified):……….	
	Socio-territorial		
	*	Regional employment an preservation of rural communities	
	*	Food quality and typicity	
		Preservation of landscapes	
		Mountain (marginal) areas keeping	
		Resistance to sprawl	
		Agri tourism	
		Other important aspects (to be specified):……….	
	Economic		
	*	Producers' income	
		Possible succession for farms	
		Farmers' quality of life	
	*	Higher net value per unit of product	
	*	Higher net value added on regional level	
		Other important aspects (to be specified):……….	
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)			
<u>C- Institutional support</u>			
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*	1	Local	
		Regional	
		Sector	
		National	
		European	
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc.... (and opposition?)	Being the Park Authority a public institution, the initiative is a form of support to farmers in the field promotion and quality enhancement		
c. Describe institutions and regulations created by the initiative?			

Database of Sustainable food supply chains initiatives (WP2)		
<u>O - General Information</u>		
a. Name of the Initiative	***7. Project of traceability system of organic eggs, produced by “Granarolo” and “Centrale del latte di Milano”***	
b. Type of Products	Eggs	
<u>A- Organisation and governance of the "new" supply chain</u>		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	Granarolo includes 484 associates producers and 20 co-operatives of collection.	
b. What is the farms’ size	Medium-big size	
c. Who is the main initiator *(put a “x” in front)*		Producers
	*	First processors or packers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
		Other associations: Granarolo, 2nd level Producers’ cooperative
d. Describe in a few sentence the main initiator	The initiators are Granarolo (Bologna) and “Centrale del latte di Milano”,	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a “x” in front)*		Local
		Regional
	*	National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism …)*	Milano and Bologna	
➢ **Size of production**		
a. Tons	Data not available	
b. Value at consumer level	The eggs have premium price because they offer guarantees of traceability	
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a “x” in front)*	1	Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*		Producers’ association
	1	Cooperative
		Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organisation
		Regional public institution (label)
		National public institution
		Other (to be specified):
c. describe in few sentences the operation	Granarolo offers guaranteed products in all chain; Granarolo processes and commercializes directly the milk that comes from various areas of Italy .	

structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing....	The "Centrale del latte" of Milan was born with the goal of to retail fresh milk in Milan. At present the "Centrale del latte" has a big collection, control and retail structure, and every day it delivers its products in more of 2000 points sale in Milan area.		
3- Social history of the initiative			
➢ **Birth**			
a. When?	2002.		
b. Who?	Granarolo and "Centrale del latte" of Milan		
c. Where?	Milan		
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*			
a. Order to put a number in front		Environmental	
		Soci-territorial	
	1	Economic	
b. Please precise these first motives, objectives and start difficulties	Granarolo has decided to be the promoter of this traceability system of organic eggs because there is a willingness to pay more for guaranteed food		
➢ **Main historical key events until now**			
a. Precise the main events in the history of the initiative	Since 2002 the consumer could know all characteristics about the eggs trough the insertion of a bar code in the web site www.coquemachine.it		
➢ **Future: main plans and intentions & bottlenecks**			
a. Describe the key ambitions, challenges in sustaining the initiative	To be able to extend this type of system also to the other products.		
b. Describe the main bottlenecks	The traceability system does not introduce many bottlenecks but it's difficult to manage the informatics system		
4 - Marketing issues			
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*		Direct selling	
		Farmers' markets	
		Specialised stores	
	1	Big retailers	
		Restaurants	
		Other (to be specified):……….	
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*		Local	
		Regional	
	1	National	
		European	
		International	
c. How are the products labelled *(many answers possible, put a "x" in front and give the name of the label)*		Private label	Name:
		Collective brand	Name:
		Regional label	Name:
		National label	Name:
		European label	Name:
B- Sustainability profile			
a. Put a "x" in front of items presented by initiative's actors themselves through websites, flyers, promotion events.	**Agri-enviromental**		
		Biodiversity	
		Preservation of specific species/races	
		Soil erosion	
		Water quality	

		Animal welfare
		Food-miles
		Other important aspects (to be specified):……….
	Socio-territorial	
		Regional employment an preservation of rural communities
		Food quality and typicity
		Preservation of landscapes
		Mountain (marginal) areas keeping
		Resistance to sprawl
		Agri tourism
		Other important aspects (to be specified):……….
	Economic	
		Producers' income
		Possible succession for farms
		Farmers' quality of life
	*	Higher net value per unit of product
		Higher net value added on regional level
		Other important aspects (to be specified):……….
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)		
C- Institutional support		
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*		Local
	1	Regional
		Sector
		National
		European
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc.... (and opposition?)		
c. Describe institutions and regulations created by the initiative?	Nothing	

Database of Sustainable food supply chains initiatives (WP2)		
O - General Information		
a. Name of the Initiative	***8. G.O.D.O: Gruppi Organizzati di Domanda e Offerta***	
b. Type of Products	Organic products	
A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	All farms operating and producing in order to reduce the pollution and the waste of energy, utilising the methods of organic agriculture and respecting the conditions of job	
b. What is the farms' size	Small size	
c. Who is the main initiator *(put a "x" in front)*		Producers
		First processors or pakkers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
	*	Other associations
d. Describe in a few sentence the main initiator	The ICEA (ex AIAB – Italian Association for Organic Agriculture) is a certifying body, the most important in Italy, ICEA controls 50% of the Italian land (263888 hectares and 12268 farms, Tuttobio, 1999).	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
		Regional
	*	National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism …)*	Italy	
➢ **Size of production**		
a. Tons	Data not available	
b. Value at consumer level	The prices are low because the products go directly from the producer to the consumer	
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*		Formal private collective organisation
	*	Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to*		Producers' association
		Cooperative
		Consortium or FSC collective private structure without any commercial activity

importance)		Channel captain (processing firm, big retail)
	2	Certification organisation
		Regional public institution (label)
		National public institution
	1	Other (to be specified)Gruppi di Aquisto Solidali.
c. describe in few sentences the operation structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing....	Main issue: critical consumption, purchasing groups in agreement: "G.O.D.O. is an experience of collective purchasing inspired by criteria of health, well-being, nature respect, solidarity towards producers, rights of all the peoples of the world and of the future generations"- A GAS is a group with no-profit scope that it is delivered up to the aim to make purchases, guided from instauration of a direct relationship and confidence between consumer and producer to the aim of a mutual advantage, with the aim to safeguard the own health, the respect for environment and the conditions of job; On the base of three criteria "little, local and solidary" , the GAS look for organic and/or ecological producers and collectively carry out the own purchases with an organisation much simple in the beginning and more and more articulated hand by hand that the group grows. G.O.D.O. is the national initiative.	
3- Social history of the initiative		
➢ **Birth**		
a. When?	2003	
b. Who?	AIAB and "Purchasing Groups in Agreement"	
c. Where?	Italy	
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*		
a. Order to put a number in front	3	Environmental
	2	Soci-territorial
	1	Economic
b. Please precise these first motives, objectives and start difficulties	Each GAS has its own motivations for starting-up, but often there is a deep critique against the current dominant model of consume and global economy, together with the research of practicable alternatives since now	
➢ **Main historical key events until now**		
a. Precise the main events in the history of the initiative		
➢ **Future: main plans and intentions & bottlenecks**		
a. Describe the key ambitions, challenges in sustaining the initiative	▪ Engaging in the building of local projects together with all the forces which, on the territory, would like to move in the same direction; ▪ promoting the starting local food chains; ▪ becoming a service structure to support producers; ▪ collaborating with the "world shops" (fair-trade) and facilitating the starting of "ethical shops", places where to find guaranteed products of major everyday use; ▪ writing and publishing local "yellow pages" (rainbow pages) to make raise a network of useful services of common territorial use.	
b. Describe the main bottlenecks	To make to emerge and to increase to a greater possible number of persons this type of commerce.	
4 - Marketing issues		
a. What is the distribution channel *(many answers possible, put a number ordered according to*	1	Direct selling
		Farmers' markets
		Specialised stores
		Big retailers

importance)		Restaurants	
		Other (to be specified):……….	
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*	1	Local	
		Regional	
		National	
		European	
		International	
c. How are the products labelled *(many answers possible, put a "x" in front and give the name of the label)*		Private label	Name:
		Collective brand	Name:
		Regional label	Name:
		National label	Name:
		European label	Name:
<u>B- Sustainability profile</u>			
a. Put a "x" in front of items presented by initiative's actors themselves through websites, flyers, promotion events.	**Agri-enviromental**		
		Biodiversity	
		Preservation of specific species/races	
		Soil erosion	
		Water quality	
		Animal welfare	
		Food-miles	
	*	Other important aspects (to be specified): rispetto dell'ambiente	
	Socio-territorial		
	*	Regional employment an preservation of rural communities	
		Food quality and typicity	
		Preservation of landscapes	
		Mountain (marginal) areas keeping	
		Resistance to sprawl	
		Agri tourism	
		Other important aspects (to be specified):……….	
	Economic		
	*	Producers' income	
		Possible succession for farms	
		Farmers' quality of life	
	*	Higher net value per unit of product	
		Higher net value added on regional level	
		Other important aspects (to be specified):……….	
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)			
<u>C- Institutional support</u>			
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*		Local	
		Regional	
		Sector	
	1	National	
		European	
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc.... (and opposition?)	"The group help feeling not alone in the own critique to consumerism, exchanging experiences and sustain, verifying the own choices"; furthermore "it allows to exchange information, access to lists of potential producers, take up some common problems, know other people who move in the same direction …".- the initiative has chiefly a 'spontaneous' dynamics of development.- "GAS - strong for the attribute (solidale/"in agreement") which distinct and make them significant - are a-typical subjects in the current context of commerce and		

	consume." .
c. Describe institutions and regulations created by the initiative?	The GAS have a statute that we can see in the web site http://newpages.inrete.it/cocorico/gas.html

Database of Sustainable food supply chains initiatives (WP2)		
O - General Information		
a. Name of the Initiative	***9. Il Canestro***	
b. Type of Products	Organic horticulture products and fruit	
A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	The farm Giustizia e Libertà Scrl	
b. What is the farms' size	40 ha.	
c. Who is the main initiator *(put a "x" in front)*	*	Producers
		First processors or pakkers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
		Other associations
d. Describe in a few sentence the main initiator	The promoter of initiative is the farm Giustizia e Libertà", partner of CON.CA.BI. (Consorzio Campano Agricoltura Biologica) CO.CA.BI (Consorzio Campano Agricoltura Biologica) is an association of producers that operates in order to develop the production, the transformation and the commercialisation of organic and typical products	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
	*	Regional
		National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	San Marzano sul Sarno, Salerno Province	
➢ **Size of production**		
a. Tons	Data not available	
b. Value at consumer level	The "canestro" (a basket of 10 kg of organic products) costs 18,5 euros, and it is consigned at home weekly	
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*	*	Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*		Producers' association
		Cooperative
	2	Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organisation
		Regional public institution (label)
		National public institution

	1	Other (to be specified): Farm	
c. describe in few sentences the operation structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing....	The farm “Giustizia e Libertà Scrl” produces through organic methods since autumn 1996. The initiative “il canestro” concerns the sell of fresh product through a “basket” ordered by the consumers. Contracts: 1 year Delivery: weekly 1 “canestro” (basket): 10 kg		
3- Social history of the initiative			
➢ **Birth**			
a. When?	1999		
b. Who?	Co-operative “Giustizia e Libertà”, CON.CA.BI		
c. Where?	San Marzano sul Sarno, Salerno.		
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*			
a. Order to put a number in front		Environmental	
		Soci-territorial	
	1	Economic	
b. Please precise these first motives, objectives and start difficulties	The idea was born to find new channel of selling in order to lower the prices and to increase the sales		
➢ **Main historical key events until now**			
a. Precise the main events in the history of the initiative	The Co-operative “Giustizia e Libertà” is engaged since 10 years in the integrated and quality productions and it produces through organic methods since autumn 1996.		
➢ **Future: main plans and intentions & bottlenecks**			
a. Describe the key ambitions, challenges in sustaining the initiative	To extend this type of initiative also to other farms of the consortium		
b. Describe the main bottlenecks	There aren’t any bottlenecks		
4 - Marketing issues			
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*	1	Direct selling	
		Farmers’ markets	
		Specialised stores	
		Big retailers	
		Restaurants	
		Other (to be specified):……….	
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*	1	Local	
	2	Regional	
	3	National	
		European	
		International	
c. How are the products labelled *(many answers possible, put a “x” in front and give the name of the label)*		Private label	Name: "Il canestro"
		Collective brand	Name:
		Regional label	Name:
		National label	Name:
		European label	Name:
B- Sustainability profile			
a. Put a “x” in front of items presented by initiative’s	**Agri-enviromental**		
		Biodiversity	

actors themselves through websites, flyers, promotion events.		Preservation of specific species/races
		Soil erosion
		Water quality
		Animal welfare
		Food-miles
		Other important aspects (to be specified):……….
	Socio-territorial	
		Regional employment an preservation of rural communities
	*	Food quality and typicity
		Preservation of landscapes
		Mountain (marginal) areas keeping
		Resistance to sprawl
		Agri tourism
		Other important aspects (to be specified):……….
	Economic	
	*	Producers' income
		Possible succession for farms
		Farmers' quality of life
	*	Higher net value per unit of product
		Higher net value added on regional level
		Other important aspects (to be specified):……….
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)		
<u>C- Institutional support</u>		
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*	1	Local
	2	Regional
		Sector
		National
		European
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc.... (and opposition?)	The Co-operative "Giustizia e Libertà" and Con.Ca.Bi are the initiators of project	
c. Describe institutions and regulations created by the initiative?	Nothing	

Database of Sustainable food supply chains initiatives (WP2)		
O - General Information		
a. Name of the Initiative	***10. Organic slaughter houses***	
b. Type of Products	Organic meat	
A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	There are two slaughter houses; ▪ the Marchesini's slaughter house with a consumers' area of 12 municipalities ▪ the Bramieri's slaughter house with a bigger consumers' area (in more provinces	
b. What is the farms' size	The Marchesini's slaughter house offers services to small farms situated in the mountain areas, instead the Bramieri's slaughter house offers services to small and big farms of Region	
c. Who is the main initiator *(put a "x" in front)*	*	Producers
		First processors or packers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
		Other associations
d. Describe in a few sentence the main initiator	Entrepreneurs who decided to find a slaughter house and to convert it to the organic	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*	1	Local
	2	Regional
	3	National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	Piacenza, Emilia Romagna Region	
➢ **Size of production**		
a. Tons	The Bramieri's slaughter house processes 400-500 animals/week	
b. Value at consumer level		
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*		Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating		Producers' association

structure *(many answers possible, put a number ordered according to importance)*		Cooperative	
		Consortium or FSC collective private structure without any commercial activity	
		Channel captain (processing firm, big retail)	
		Certification organisation	
		Regional public institution (label)	
		National public institution	
	1	Other (to be specified): Entrepreneurs	
c. describe in few sentences the operation structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing….			
3- Social history of the initiative			
➢ **Birth**			
a. When?	2003		
b. Who?	Farms		
c. Where?	Piacenza		
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*			
a. Order to put a number in front		Environmental	
		Soci-territorial	
	1	Economic	
b. Please precise these first motives, objectives and start difficulties	The slaughter houses were born to increase organic breeding and to close the meat chain		
➢ **Main historical key events until now**			
a. Precise the main events in the history of the initiative	The start of activity and the obtain of the certifications		
➢ **Future: main plans and intentions & bottlenecks**			
a. Describe the key ambitions, challenges in sustaining the initiative			
b. Describe the main bottlenecks	There isn't any bottlenecks		
4 - Marketing issues			
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*		Direct selling	
		Farmers' markets	
		Specialized stores	
	1	Big retailers	
		Restaurants	
		Other (to be specified):……….	
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*	1	Local	
	2	Regional	
	3	National	
		European	
		International	
c. How are the products labelled *(many answers*		Private label	Name:
		Collective brand	Name:

possible, put a "x" in front and give the name of the label)		Regional label	Name:
		National label	Name:
		European label	Name:
<u>B- Sustainability profile</u>			
a. Put a "x" in front of items presented by initiative's actors themselves through websites, flyers, promotion events.	**Agri-enviromental**		
		Biodiversity	
		Preservation of specific species/races	
		Soil erosion	
		Water quality	
		Animal welfare	
		Food-miles	
		Other important aspects (to be specified):……….	
	Socio-territorial		
		Regional employment an preservation of rural communities	
		Food quality and typicity	
		Preservation of landscapes	
		Mountain (marginal) areas keeping	
		Resistance to sprawl	
		Agri tourism	
		Other important aspects (to be specified):……….	
	Economic		
	*	Producers' income	
		Possible succession for farms	
		Farmers' quality of life	
	*	Higher net value per unit of product	
		Higher net value added on regional level	
		Other important aspects (to be specified):……….	
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)			
<u>C- Institutional support</u>			
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*	1	Local	
		Regional	
		Sector	
		National	
		European	
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc.... (and opposition?)			
c. Describe institutions and regulations created by the initiative?			

Database of Sustainable food supply chains initiatives (WP2)		
O - General Information		
a. Name of the Initiative	***11. Marchio di qualità per le aziende del Parco nazionale del Pollino***	
b. Type of Products	The agricultural products of the farms located in the park.	
A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	Approximately 20 farms	
b. What is the farms' size	Small-medium size, Average Campania: 11 ha, Average Basilicata 24 ha.	
c. Who is the main initiator *(put a "x" in front)*		Producers
		First processors or pakkers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
	*	Other associations
d. Describe in a few sAuthoritynce the main initiator	The Authority is composed by: <u>The president</u>: the representative and co-ordinator of activities; <u>The directive council</u>: than, with to the president, manages the "Authority" <u>The park's community</u>: consults organ of "Authority", constituted by the the Authority, Regions, provinces' presidents, municipalities' mayors and "comunità montane"	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
	*	Regional
		National
b. precise the localisation and describe in few sAuthoritynces the specific characteristics of the territory *(environment , landscapes, tourism ...)*	The initiative involves the National Park area situated in Calabria and Basilicata regions. It is located in two regions, Basilicata and Calabria, and between two seas, Tyrrhenian and the Ionian one. the Pollino Park (192,565 hectares) is the biggest protected area of Italy. The territory is a mountainous area, with a very interesting fluvial systems (some rivers are important for thermal characteristics).	
➢ **Size of production**		
a. Tons	Data not available	
b. Value at consumer level	The goal is to sell the labelled products with a great price	
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*	*	Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers*		Producers' association
		Cooperative

possible, put a number ordered according to importance)		Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organisation
	2	Regional public institution (label)
		National public institution
	1	Other (to be specified): Authority Parco del Pollino
c. describe in few sAuthorityntces the operation structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing....	The "Park Authority is a structure with various roles: - to legislate (in agreement with the regional agencies) - to delineate the plan of the park, - to control the activity of Park The Agriculture Councillor ships of Basilicata and Calabria purposes to coordinate and to legislate on the agricultural and environmental sector.	
3- Social history of the initiative		
➢ **Birth**		
a. When?	2001.	
b. Who?	"Park Authority of Pollino"	
c. Where?	"Parco Nazionale del Pollino"	
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*		
a. Order to put a number in front	3	Environmental
	1	Soci-territorial
	2	Economic
b. Please precise these first motives, objectives and start difficulties	The idea was born to valorise the products of the farms located in the Park, that are produced with sustainable methods	
➢ **Main historical key events until now**		
a. Precise the main events in the history of the initiative		
➢ **Future: main plans and intentions & bottlenecks**		
a. Describe the key ambitions, challenges in sustaining the initiative	The ambition is to create a model of sustainable agriculture which can be exported also in others similar areas	
b. Describe the main bottlenecks	There aren't any bottlenecks. The brand was introduced when there was a good level of organization among the farms of the park.	
4 - Marketing issues		
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*	1	Direct selling
		Farmers' markets
	3	Specialised stores
		Big retailers
	2	Restaurants
		Other (to be specified):
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*	1	Local
	2	Regional
		National
		European
		International
c. How are the products		Private label — Name:

labelled *(many answers possible, put a "x" in front and give the name of the label)*	*	Collective brand	Name: "The blue brand" Parco Nazionale del Pollino.
		Regional label	Name:
		National label	Name:
		European label	Name:
B- Sustainability profile			
a. Put a "x" in front of items presAuthorityd by initiative's actors themselves through websites, flyers, promotion events.	**Agri-enviromental**		
	*	Biodiversity	
		Preservation of specific species/races	
	*	Soil erosion	
		Water quality	
		Animal welfare	
		Food-miles	
		Other important aspects (to be specified):……….	
	Socio-territorial		
	*	Regional employment an preservation of rural communities	
	*	Food quality and typicity	
		Preservation of landscapes	
		Mountain (marginal) areas keeping	
	*	Resistance to sprawl	
		Agri tourism	
		Other important aspects (to be specified):……….	
	Economic		
	*	Producers' income	
		Possible succession for farms	
		Farmers' quality of life	
	*	Higher net value per unit of product	
	*	Higher net value added on regional level	
		Other important aspects (to be specified):……….	
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)			
C- Institutional support			
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*	1	Local	
		Regional	
		Sector	
		National	
		European	
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc.... (and opposition?)	The "Park Authority" emits the regulations about the requirement of farms to obtain the brand		
c. Describe institutions and regulations created by the initiative?	The regulations includes the rules that the farms must respect for the utilise of the brand		

Database of Sustainable food supply chains initiatives (WP2)		
O - General Information		
a. Name of the Initiative	***12.* Melinda *and Trentina: Collective brands of product for apples from integrated agriculture***	
b. Type of Products	Apples	
A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	Melinda counts 5223 producers associated in 16 co–operatives, "Trentina" counts 1400 producers associated in 4 co–operatives	
b. What is the farms' size	Medium-big size	
c. Who is the main initiator *(put a "x" in front)*	*	Producers
		First processors or pakkers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
		Other associations
d. Describe in a few sentence the main initiator	The partners of co–operatives operating in "Val di Non" and "Val di Sole", make the Melinda Consortium which produces only high quality apples. Trentina operates instead in the smaller area between Adige, Valsugana and Basso Sarca	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
	*	Regional
		National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	Val di Non (Trentino Alto Adige). The Valle di Non is not a valley but a plateau. The largest valley in the Trentino region is, in fact, a series of undulating amphitheatres which, in almost concentric circles, rise from the lower altitudes where fruit trees grow up to altitudes where Alpine plants and trees abound alongside meadows and rocks. This long and undulating plateau which is criss-crossed by rivers Open to the north and protected by the Maddalene chain, this series of terraces has a luminosity and light all its own. In spring the valley is a garden of flowers, a wonderful palette of whites and pinks against the dark backdrop of the woods with the snow-capped peaks in the background; in summer and in autumn the thousands of jets of water from the irrigation plants give the impression of a fabric of white threads which appear against the light and the backdrop of the green trees which are already laden with fruit. The geographic characteristics go a long way to explaining the valley's vocation for agriculture with its many fruit warehouses, the modern equivalent of the castles of yore, both of which, together with the bell towers are dotted throughout this profoundly anthropic landscape. As well as these physical characteristics the valley has another two peculiarities: it is a land of mountains and it is Italy's linguistic border.	
➢ **Size of production**		
a. Tons	Melinda 313,847 tons; Trentina 60,000 tons	
b. Value at consumer level	Competitive prices as a consequence of the big spread of the apples	

2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*	*	Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*		Producers' association
	*	Cooperative
		Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organisation
		Regional public institution (label)
		National public institution
		Other (to be specified):
c. describe in few sentences the operation structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing....	The goal is the production of high quality apples through the utilisation of integrated methods and disciplinary. So to produce high quality and genuine apples and make the consumer approach the Trentino reality: these are the most important Melinda's ending. Behind the most widely known and highly appreciated "Melinda" brand, there is the rediscovering of the antique tastes and flavours	
3- Social history of the initiative		
➢ **Birth**		
a. When?	1989 Melinda;	
b. Who?	Melinda and Trentina	
c. Where?	Trentino Alto Adige	
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*		
a. Order to put a number in front	2	Environmental
	3	Soci-territorial
	1	Economic
b. Please precise these first motives, objectives and start difficulties	The co-operatives of producers decided to unite themselves and found the brands to valorise own products and to produce quality apples	
➢ **Main historical key events until now**		
a. Precise the main events in the history of the initiative	In 1989, the 5200 members of 16 apple-producing cooperatives working in Val di Non created the Melinda Consortium. This Consortium would have produced in the two Trentino valleys only and exclusively high quality apples. The fruit growers are all signers of the disciplinary protocol for the integrated production, the regulations (which is possible to accept within april 15th of every year), indicating the rules necessary to produce quality apple, in full respect of the expected standards of consumers, strictly controlling the observance of the rules by the producers.	
➢ **Future: main plans and intentions & bottlenecks**		
a. Describe the key ambitions, challenges in sustaining the initiative	To maintain and to improve the quality standards	
b. Describe the main bottlenecks		
4 - Marketing issues		

a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*	2	Direct selling	
	3	Farmers' markets	
		Specialised stores	
	1	Big retailers	
		Restaurants	
		Other (to be specified):……….	
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*		Local	
	2	Regional	
	1	National	
		European	
		International	
c. How are the products labelled *(many answers possible, put a "x" in front and give the name of the label)*		Private label	Name:
	*	Collective brand	Name:Melinda and La Trentina.
		Regional label	Name:
		National label	Name:
		European label	Name:
<u>B- Sustainability profile</u>			
a. Put a "x" in front of items presented by initiative's actors themselves through websites, flyers, promotion events.	**Agri-enviromental**		
	*	Biodiversity	
		Preservation of specific species/races	
		Soil erosion	
	*	Water quality	
		Animal welfare	
		Food-miles	
		Other important aspects (to be specified):	
	Socio-territorial		
		Regional employment an preservation of rural communities	
	*	Food quality and typicity	
		Preservation of landscapes	
		Mountain (marginal) areas keeping	
		Resistance to sprawl	
		Agri tourism	
		Other important aspects (to be specified):	
	Economic		
	*	Producers' income	
		Possible succession for farms	
		Farmers' quality of life	
	*	Higher net value per unit of product	
	*	Higher net value added on regional level	
		Other important aspects (to be specified):……….	
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)			
<u>C- Institutional support</u>			
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*	1	Local	
		Regional	
		Sector	
		National	
		European	
b. Precise the institution and the type of support: laws, subsidies, studies,			

investments credit, etc.... (and opposition?)	
c. Describe institutions and regulations created by the initiative?	The farms created a disciplinary of production and the regulations for the use of the brands

Database of Sustainable food supply chains initiatives (WP2)		
<u>O - General Information</u>		
a. Name of the Initiative	***13. GMO free, L.R. 53/00***	
b. Type of Products	All products	
<u>A- Organisation and governance of the "new" supply chain</u>		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	About 50.000 farms in Tuscany	
b. What is the farms' size	Small, medium and big scales	
c. Who is the main initiator *(put a "x" in front)*		Producers
		First processors or pakkers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
		Other associations
d. Describe in a few sentence the main initiator	Tuscany Region, as all the other Regions in Italy, has legislative power over agriculture	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
	*	Regional
		National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	Tuscany Region	
➢ **Size of production**		
a. Tons	5000 tons	
b. Value at consumer level	Competion prices	
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*		Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*		Producers' association
		Cooperative
		Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organisation
		Regional public institution (label)
		National public institution
	*	Other (to be specified): Tuscany Region
c. describe in few sentences the operation structure(s)(type, name) and its (their) main	The law : - prohibits the cultivation and introduction into the regional territory of GMO in agricultural products - sets up a control systems in the fields and on the food	

missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing....		
3- Social history of the initiative		
➢ **Birth**		
a. When?	2000.	
b. Who?	Tuscany Region	
c. Where?	Tuscany	
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*		
a. Order to put a number in front	1	Environmental
		Soci-territorial
	2	Economic
b. Please precise these first motives, objectives and start difficulties	This law is issued to eliminate the GMO to Tuscany agriculture productions and to valorise the typical food of Region	
➢ **Main historical key events until now**		
a. Precise the main events in the history of the initiative	To fill in and to issue the regional law 53/00	
➢ **Future: main plans and intentions & bottlenecks**		
a. Describe the key ambitions, challenges in sustaining the initiative		
b. Describe the main bottlenecks		
4 - Marketing issues		
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*	3	Direct selling
	2	Farmers' markets
		Specialised stores
	1	Big retailers
	4	Restaurants
		Other (to be specified):……….
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*		Local
	1	Regional
		National
		European
		International
c. How are the products labelled *(many answers possible, put a "x" in front and give the name of the label)*		Private label — Name:
		Collective brand — Name:
		Regional label — Name:
		National label — Name:
		European label — Name:
B- Sustainability profile		
a. Put a "x" in front of items presented by initiative's actors themselves through websites, flyers, promotion events.	**Agri-enviromental**	
	*	Biodiversity
	*	Preservation of specific species/races
		Soil erosion
		Water quality
		Animal welfare
		Food-miles
		Other important aspects (to be specified):……….
	Socio-territorial	

		Regional employment an preservation of rural communities
		Food quality and typicity
		Preservation of landscapes
		Mountain (marginal) areas keeping
		Resistance to sprawl
		Agri tourism
		Other important aspects (to be specified):……….
	Economic	
		Producers' income
		Possible succession for farms
		Farmers' quality of life
	*	Higher net value per unit of product
		Higher net value added on regional level
		Other important aspects (to be specified):……….
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)		
C- Institutional support		
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*		Local
	1	Regional
		Sector
		National
		European
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc.... (and opposition?)	The Region fills in and issues this law	
c. Describe institutions and regulations created by the initiative?	Regional law 53/00.	

Database of Sustainable food supply chains initiatives (WP2)		
O - General Information		
a. Name of the Initiative	***14. Development of informatic integrated system for the traceability of fruit and horticulture products***	
b. Type of Products	Fruit and horticulture products	
A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	75,000 producers	
b. What is the farms' size	Small, medium and big size	
c. Who is the main initiator *(put a "x" in front)*	*	Producers
		First processors or pakkers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
		Other associations
d. Describe in a few sentence the main initiator	**UNAPROA *Unione Nazionale Associazioni Produttori Ortofrutticoli Agrumari e di Frutta in guscio*. In the 2000 UNAPROA grouped 75000 producers with more than 5,5 million tons collections, with a surface beyond 200000 hectares for a value of 1,8 billions of euros.** ·	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
		Regional
	*	National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	Italy	
➢ **Size of production**		
a. Tons	5,5 millions of tons	
b. Value at consumer level	Data not available	
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*		Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*	1	Producers' association
		Cooperative
		Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organisation

		Regional public institution (label)	
	2	National public institution	
		Other (to be specified):	
c. describe in few sentences the operation structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing….			
3- Social history of the initiative			
➢ **Birth**			
a. When?	2003		
b. Who?	UNAPROA		
c. Where?	Italy		
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*			
a. Order to put a number in front		Environmental	
		Soci-territorial	
	1	Economic	
b. Please precise these first motives, objectives and start difficulties	The task of this project is to create a traceability system within different horticulture and fruit chains		
➢ **Main historical key events until now**			
a. Precise the main events in the history of the initiative	The creation of informatic technologies for the chain control		
➢ **Future: main plans and intentions & bottlenecks**			
a. Describe the key ambitions, challenges in sustaining the initiative			
b. Describe the main bottlenecks	To manage elevated productions and great number of producers		
4 - Marketing issues			
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*		Direct selling	
		Farmers' markets	
	2	Specialised stores	
	1	Big retailers	
	3	Restaurants	
		Other (to be specified):……….	
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*		Local	
		Regional	
	1	National	
		European	
		International	
c. How are the products labelled *(many answers possible, put a "x" in front and give the name of the label)*		Private label	Name:
		Collective brand	Name:
		Regional label	Name:
		National label	Name:
		European label	Name:
<u>B- Sustainability profile</u>			
a. Put a "x" in front of items	**Agri-enviromental**		

presented by initiative's actors themselves through websites, flyers, promotion events.		Biodiversity
		Preservation of specific species/races
		Soil erosion
		Water quality
		Animal welfare
		Food-miles
		Other important aspects (to be specified):……….
	Socio-territorial	
		Regional employment an preservation of rural communities
		Food quality and typicity
		Preservation of landscapes
		Mountain (marginal) areas keeping
		Resistance to sprawl
		Agri tourism
		Other important aspects (to be specified):……….
	Economic	
	*	Producers' income
		Possible succession for farms
		Farmers' quality of life
	*	Higher net value per unit of product
		Higher net value added on regional level
		Other important aspects (to be specified):……….
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)		
<u>C- Institutional support</u>		
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*		Local
		Regional
		Sector
	1	National
		European
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc…. (and opposition?)	The MiPAF (The Ministry of Agriculture and Forestry) provides the institutional, technical and financial support	
c. Describe institutions and regulations created by the initiative?		

Database of Sustainable food supply chains initiatives (WP2)		
O - General Information		
a. Name of the Initiative	***15. Presidio Slow Food***	
b. Type of Products	Sheep-cheese: "Pecorino a latte crudo delle Montagne Pistoiesi"	
A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	20	
b. What is the farms' size	Small dimension	
c. Who is the main initiator *(put a "x" in front)*		Producers
		First processors or pakkers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
	*	Consumer associations
		Environmental associations
		Other associations
d. Describe in a few sentence the main initiator	Slow Food is a consumer association for a quality food culture. It was born in Italy in 1986 with the aim to defend the local, traditional and specific food in front of the global food, overcoming the homogenising food global power, and re-producing a new food awareness and culture. The association helps consumers to get empowerment and awareness avoiding cultural commodisation, and producers to increase self-consciousness and market opportunities by creating new links to connect to consumers.	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*	*	Local
		Regional
		National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism …)*	The production is located in a mountain region of Tuscany (1100-1300 m). In this area a lot of farms run an agritourist farm, because there is an hilly landscape.	
➢ **Size of production**		
a. Tons	3 tons/year	
b. Value at consumer level	300,000 euros/year	
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*		Formal private collective organisation
	*	Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*	2	Producers' association
		Cooperative
	1	Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organisation
		Regional public institution (label)

		National public institution
		Other (to be specified):……….
c. describe in few sentences the operation structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing….	Consortium "Montagne e Valli di Pistoia" for the promotion and valorization of the "Pecorino a Latte crudo della Montagna Pistoiese". Its missions are: definition of a code of practices, quality and hygenic controls, promotion (trough Slow Food *Presidio*) and organisation of manifestations.	
3- Social history of the initiative		
➢ **Birth**		
a. When?	2001	
b. Who?		
c. Where?	Pistoia (Tuscany)	
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*		
a. Order to put a number in front	3	Environmental
	2	Socio-territorial
	1	Economic
b. Please precise these first motives, objectives and start difficulties	The Presidio is organised in order to protect the product from the "extinction" and promote its production at local level. The main goals are: improving the incomes of producers, competitiveness of farms and so the rural life, trough rural tourism. Start difficult: sceptical attitude of some producers.	
➢ **Main historical key events until now**		
a. Precise the main events in the history of the initiative	The most widespread event is the "Salone del Gusto" held in Turin each two years. Other important events are: "la rassegna dei prodotti della pastorizia pistoiese" and "la festa dei pastori".	
➢ **Future: main plans and intentions & bottlenecks**		
a. Describe the key ambitions, challenges in sustaining the initiative	The ambition is to improve the level of information about the *"Presidio"* to consumers	
b. Describe the main bottlenecks	Lack of knowledge of "Presidio Slow Food"	
4 - Marketing issues		
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*	2	Direct selling
		Farmers' markets
	1	Specialised stores
		Big retailers
	3	Restaurants
		Other (to be specified):……….
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*	1	Local
	2	Regional
		National
		European
		International

c. How are the products labelled *(many answers possible, put a "x" in front and give the name of the label)*		Private label	Name:
	*	Collective brand	Name: "Il Pecorino a latte crudo della Montagna Pistoiese" Presidio Slow Food Licenza d'uso n.1
		Regional label	Name:
		National label	Name:
		European label	Name:

B- Sustainability profile		
a. Put a “x” in front of items presented by initiative’s actors themselves through websites, flyers, promotion events.	**Agri-enviromental**	
	*	Biodiversity
		Preservation of specific species/races
		Soil erosion
		Water quality
		Animal welfare
		Food-miles
		Other important aspects (to be specified):……….
	Socio-territorial	
	*	Regional employment an preservation of rural communities
	*	Food quality and typicity
	*	Preservation of landscapes
	*	Mountain (marginal) areas keeping
		Resistance to sprawl
		Agri tourism
		Other important aspects (to be specified):……….
	Economic	
	*	Producers’ income
	*	Possible succession for farms
	*	Farmers’ quality of life
		Higher net value per unit of product
		Higher net value added on regional level
		Other important aspects (to be specified):……….
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)		
C- Institutional support		
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*	2	Local
	1	Regional
		Sector
		National
		European
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc.... (and opposition?)	The Pistoia province and the "Comunità Montana" support this production trough economics investments.	
c. Describe institutions and regulations created by the initiative?	The Consortium of valorisation has codified the practical productive.	

Database of Sustainable food supply chains initiatives (WP2)		
O - General Information		
a. Name of the Initiative	**16. Promotion and valorisation of typical and regional agro-food products in Lazio Region**	
b. Type of Products	Typical products	
A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	Data not available (the project is starting)	
b. What is the farms' size	Medium size, average:13 ha	
c. Who is the main initiator *(put a "x" in front)*		Producers
		First processors or packers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
	*	Other associations
d. Describe in a few sentence the main initiator	"Lazio Agriculture Assessor ship", the regional coordinator of agriculture activity	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
	*	Regional
		National
b. precise the localization and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	Lazio Region	
➢ **Size of production**		
a. Tons	Data not available (the project is starting)	
b. Value at consumer level	Data not available (the project is starting)	
2- Collective organisation of the initiative		
a. What is the type of collective organization *(put a "x" in front)*		Formal private collective organization
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*		Producers' association
		Cooperative
		Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organization
	1	Regional public institution (label)
		National public institution
		Other (to be specified):
c. describe in few sentences the operation	The Agriculture Assessor ship co-ordinates, promotes and regularises the The promotion activity will develop on national and international markets through	

structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing....	fairs, gastronomy tourism and marketing activity	
3- Social history of the initiative		
➢ **Birth**		
a. When?	2003.	
b. Who?	The Agriculture Assessorship	
c. Where?	Lazio	
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*		
a. Order to put a number in front		Environmental
		Soci-territorial
	1	Economic
b. Please precise these first motives, objectives and start difficulties	The objective of the project is to valorise the typical and organic products of Lazio	
➢ **Main historical key events until now**		
a. Precise the main events in the history of the initiative		
➢ **Future: main plans and intentions & bottlenecks**		
a. Describe the key ambitions, challenges in sustaining the initiative	▪ To support the creation, for the promotion of the Lazio Product, of a public integrated system and a greater co-ordination between the promotion activities; ▪ To elaborate policy for the increase the quality of products through European brands; ▪ To consolidate the positions of typical the agricultural and food- and oeno-gastronomic products on the already acquired markets; ▪ To upgrade the commercialisation of the regional typical oeno-gastronomic products on the roman market; ▪ To implement synergies between agricultural sector and the other sector for the rural development, also through instruments of integrated development (wine or oil routs etc.); ▪ To draw the image of the typical products, through modern technical of communication; ▪ To safeguard, on the regional territory, the existence of oeno-gastronomic products with extinction risk through the involvement of the ho.re.ca.; ▪ To support a process of development of festivals, fairs and oter promotional initiatives.	
b. Describe the main bottlenecks	To find new commercial channels	
4 - Marketing issues		
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*		Direct selling
		Farmers' markets
		Specialised stores
		Big retailers
	2	Restaurants
	1	Other (to be specified): national and international fairs
b. What are the relevant consumer markets *(many*		Local
	1	Regional

answers possible, put a number ordered according to importance)	2	National	
	3	European	
		International	
c. How are the products labelled *(many answers possible, put a "x" in front and give the name of the label)*		Private label	Name:
		Collective brand	Name:
		Regional label	Name:
		National label	Name:
		European label	Name:
B- Sustainability profile			
a. Put a "x" in front of items presented by initiative's actors themselves through websites, flyers, promotion events.	**Agri-enviromental**		
		Biodiversity	
		Preservation of specific species/races	
		Soil erosion	
		Water quality	
		Animal welfare	
		Food-miles	
		Other important aspects (to be specified):……….	
	Socio-territorial		
		Regional employment an preservation of rural communities	
	*	Food quality and typicity	
		Preservation of landscapes	
		Mountain (marginal) areas keeping	
		Resistance to sprawl	
		Agri tourism	
		Other important aspects (to be specified):……….	
	Economic		
	*	Producers' income	
	*	Possible succession for farms	
		Farmers' quality of life	
	*	Higher net value per unit of product	
	*	Higher net value added on regional level	
		Other important aspects (to be specified):……….	
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)			
C- Institutional support			
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*		Local	
	1	Regional	
		Sector	
		National	
		European	
b. Precise the institution and the type of support:	The Assessor ship purposes to manage the promotion activity of farms		
c. Describe institutions and regulations created by the initiative?			
Database of Sustainable food supply chains initiatives (WP2)			
O - General Information			
a. Name of the Initiative	***17. Marchio della farfallina***		
b. Type of Products	Cereal productions: bread and pasta called *Pasta Tosca*		

A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	46 farms	
b. What is the farms' size	small, medium and big size	
c. Who is the main initiator *(put a "x" in front)*		Producers
		First processors or pakkers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
	*	Other associations
d. Describe in a few sentence the main initiator	Regional Agency for Development and innovation in agriculture sector (ARSIA), a branch of the Regional Government of Tuscany	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
	*	Regional
		National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	Tuscany Region, in particular the wheat *duro* comes from Maremma, Val D'Orcia Park, Crete Senesi , Pisa and Livorno	
➢ **Size of production**		
a. Tons	26000 q of pasta (derived from 40000 q of wheat *duro)*	
b. Value at consumer level	At present there is the pasta which is sold with lower prices then conventional one but the idea is to valorise more The price is 0.6 euros/boxing	
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*		Formal private collective organisation
	*	Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*	*	Producers' association
		Cooperative
		Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organisation
		Regional public institution (label)
		National public institution
		Other (to be specified): Tuscany Region
c. describe in few sentences the operation structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and	*Toscana Cerali (*Tuscany Cereals) is a producers' association. The aim of Tuscany Cereals is to valorise cereals productions. As matter of fact, thanks the regional law 25/99 it is possible to know the history and the origin (the traceability) of a product and its link with a specific territory. For these reasons, the Tuscany Association Cereals has stipulated some agreements of supply chain with producers, transformers and retailers (UNICOOP Firenze). Therefore they have been grouped and subordinates to integrated methods 46 farms in Tuscany.	

development, lobbying, contract templates, management of volumes , price fixing....	To label a product with the brand of the agri-quality, it is necessary that every subjects of the supply chain adhere to two codes of practices: The first concerns the ways of wheat cultivation (using integrated methods, GMOS free), while the second is for the conservation of the wheat and transformations in pasta (for example, using only spring water) .		
3- Social history of the initiative			
➢ **Birth**			
a. When?	2003		
b. Who?	ARSIA		
c. Where?	Tuscany		
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*			
a. Order to put a number in front	2	Environmental	
		Soci-territorial	
	1	Economic	
b. Please precise these first motives, objectives and start difficulties	The task of this regional act is to protection and promote the regional integrated productions		
➢ **Main historical key events until now**			
a. Precise the main events in the history of the initiative	The Region filled in the regional act 25/99. Thanks this it is possible to use a particular collective label, representing like symbol a white butterfly, synonym of healthy and cleaned nature; all those products have to follow a specific disciplinary of production and transformation. This brand is a guarantee of traceability: all raw has to come from Tuscany. The law 25/2001 establishes a code of practices. All farmers adhering to the code have the right to a logo (a butterfly) and to be mentioned as Tuscan products. Also financial support to promotional activities and to technical assistance is granted. The first products with the agri-quality collective brand are two, that is the so called paste "the Tosca" and the bread. It presents two lines: "Panem Nostrum", deriving from the transformation of flour milled on stone and natural levitation; "From Tuscany" agri-quality Tuscany, attending PDO label. The Tosca pasta and the bread from Tuscany are commercialised by UNICOOP Firenze. The " week of Bread and Pasta" event (in Volterra, on 24 January 2003) has been the occasion for the presentation of the brand "agri-quality".		
➢ **Future: main plans and intentions & bottlenecks**			
a. Describe the key ambitions, challenges in sustaining the initiative	To make a new disciplinary of production and to extend its application to other products		
b. Describe the main bottlenecks	There aren't any bottlenecks		
4 - Marketing issues			
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*		Direct selling	
	2	Farmers' markets	
		Specialised stores	
	1	Big retailers	
		Restaurants	
		Other (to be specified):……….	
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*		Local	
	1	Regional	
		National	
		European	
		International	
c. How are the products		Private label	Name:

labelled *(many answers possible, put a "x" in front and give the name of the label)*	*	Collective brand	Name: "marchio della farfallina" of agriquality which certify all supply chain
		Regional label	Name:
		National label	Name:
		European label	Name:

B- Sustainability profile

a. Put a "x" in front of items presented by initiative's actors themselves through websites, flyers, promotion events.	**Agri-enviromental**	
		Biodiversity
		Preservation of specific species/races
		Soil erosion
		Water quality
		Animal welfare
		Food-miles
		Other important aspects (to be specified):
	Socio-territorial	
	*	Regional employment an preservation of rural communities
	*	Food quality and typicity
	*	Preservation of landscapes
		Mountain (marginal) areas keeping
		Resistance to sprawl
		Agri tourism
		Other important aspects (to be specified):……….
	Economic	
	*	Producers' income
		Possible succession for farms
		Farmers' quality of life
	*	Higher net value per unit of product
	*	Higher net value added on regional level
		Other important aspects (to be specified):……….
b. Possible remarks on the above mentioned items		

C- Institutional support

a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*		Local
	1	Regional
		Sector
		National
		European
b. Precise the institution and the type of support:	The Tuscany Region issued the law and it subscribes agreements with the big retailers for the commercialisation	
c. Describe institutions and regulations created by the initiative?	Two codes of practices which regulated the production and the transformation	

Database of Sustainable food supply chains initiatives (WP2)

<u>O - General Information</u>

a. Name of the Initiative	***18. Valorisation of the Scrisi and Cutà plateau***
b. Type of Products	All products of this area

<u>A- Organisation and governance of the "new" supply chain</u>

1- Boundaries of the supply chain and main actors

- **main actors of the "new" food supply chain**

a. How many producers are involved	Data not available

b. What is the farms' size	Medium-small- scale farms (average 8 ha)	
c. Who is the main initiator *(put a "x" in front)*		Producers
		First processors or pakkers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
	*	Environmental associations
		Other associations
d. Describe in a few sentence the main initiator	Legambiente is an environment association, operating on all the national territory through an articulated organisation, which in the '90s, in a scenery of growing awareness of the environmental and health problems related to modern production models, have assumed an increasingly important function of lobbying in the national and regional policies for environment and, more recently, for rural development. In the most recent years, a particularly favourable context in this direction was created by the previous Minister of Agriculture, belonging to the Green Party. AIAB is a cultural association which purpose is to improve organic farming, rural and ecological development and natural feeding. It associate agriculture producers, consumers and ecological associations. It has 14000 associates. Since 1992 it works like a national organisation for control and certification of organic productions, in according with CEE Reg. 2092/91.	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
	*	Regional
		National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	Scrisi and Cutà plateau, Vibo Valentia province, Calabria Region. It is an hilly natural and agriculture area.	
➢ **Size of production**		
a. Tons	Data not available	
b. Value at consumer level	Trough the area valorisation they will try to valorise agriculture products to ensure more profit to producers	
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*	*	Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*		Producers' association
		Cooperative
		Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organisation
		Regional public institution (label)
	1	National public institution
		Other (to be specified):……….
c. describe in few sentences the operation structure(s)(type, name) and its (their) main missions such as :		

definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing….			
3- Social history of the initiative			
➢ **Birth**			
a. When?	2003		
b. Who?	AIAB Calabria and Legambiente		
c. Where?	Vibo Valentia		
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*			
a. Order to put a number in front	1	Environmental	
	3	Soci-territorial	
	2	Economic	
b. Please precise these first motives, objectives and start difficulties	The most important task is the preservation of rural communities trough new employment in agriculture sector. The start difficulty is to persuade young people for this business		
➢ **Main historical key events until now**			
a. Precise the main events in the history of the initiative			
➢ **Future: main plans and intentions & bottlenecks**			
a. Describe the key ambitions, challenges in sustaining the initiative	To create an area where the subjects work to upgrade the landscape		
b. Describe the main bottlenecks	To do agreements for the environment protection and for the economic development of this area		
4 - Marketing issues			
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*	1	Direct selling	
		Farmers' markets	
		Specialised stores	
		Big retailers	
		Restaurants	
		Other (to be specified):……….	
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*	1	Local	
		Regional	
		National	
		European	
		International	
c. How are the products labelled *(many answers possible, put a "x" in front and give the name of the label)*		Private label	Name:
		Collective brand	Name:
		Regional label	Name:
		National label	Name:
		European label	Name:
B- Sustainability profile			
a. Put a "x" in front of items presented by initiative's actors themselves through websites, flyers, promotion events.	**Agri-enviromental**		
	*	Biodiversity	
		Preservation of specific species/races	
	*	Soil erosion	
		Water quality	
		Animal welfare	
		Food-miles	
		Other important aspects (to be specified):……….	
	Socio-territorial		
	*	Regional employment an preservation of rural communities	

		Food quality and typicity
	*	Preservation of landscapes
		Mountain (marginal) areas keeping
	*	Resistance to sprawl
		Agri tourism
		Other important aspects (to be specified):……….
	Economic	
	*	Producers' income
		Possible succession for farms
		Farmers' quality of life
	*	Higher net value per unit of product
	*	Higher net value added on regional level
		Other important aspects (to be specified):……….
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)		
<u>C- Institutional support</u>		
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*	3	Local
	2	Regional
		Sector
	1	National
		European
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc…. (and opposition?)	Legambiente, AIAB and the province together proposed the initiative. The local authorities will project the possible interventions and they will issue laws.	
c. Describe institutions and regulations created by the initiative?		

Database of Sustainable food supply chains initiatives (WP2)		
O - General Information		
a. Name of the Initiative	***19. Valle del Biologico***	
b. Type of Products	Organic products	
A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	About 40 organic farms	
b. What is the farms' size	Small and medium size (average 13 ha)	
c. Who is the main initiator *(put a "x" in front)*		Producers
		First processors or pakkers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
	*	Other associations: Municipality of varese ligure
d. Describe in a few sentence the main initiator	Varese Ligure municipality, one of the first European village to obtain the environmental certification, promoter of organic agriculture in the farms located in the valley	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*	*	Local
		Regional
		National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	Vara Valley, la Spezia province, Liguria region. The valley is characterized by vast and natural areas with woods and luxuriant fauna where there is a network of small farms associated in co-operatives, producing with environmental friendly productions. There is a lot of green tourism.	
➢ **Size of production**		
a. Tons	Data not available	
b. Value at consumer level	The level of prices is higher then conventional one, but there is an interest towards these quality productions	
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*	*	Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*		Producers' association
	3	Cooperative
		Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
	2	Certification organisation
	1	Regional public institution (label)
		National public institution

		Other (to be specified):	
c. describe in few sentences the operation structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing....	The co-operatives unite different producers and they try to valorise the quality productions All the products are certified as organic. The whole valley is trying to certify under EMAS scheme		
3- Social history of the initiative			
➢ **Birth**			
a. When?	2002		
b. Who?	Varese Ligure Municipality and producers co-operatives		
c. Where?	Varese ligure, La Spezia, Liguria.		
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*			
a. Order to put a number in front	1	Environmental	
	3	Soci-territorial	
	2	Economic	
b. Please precise these first motives, objectives and start difficulties	The idea is to extend this environmental certification also to other agriculture productions and breeding		
➢ **Main historical key events until now**			
a. Precise the main events in the history of the initiative	At present the products are sold also in the big retails		
➢ **Future: main plans and intentions & bottlenecks**			
a. Describe the key ambitions, challenges in sustaining the initiative	To improve the image of the valley, to raise tourist flows, to make the agriculture of the valley grow		
b. Describe the main bottlenecks			
4 - Marketing issues			
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*	1	Direct selling	
		Farmers' markets	
		Specialised stores	
	3	Big retailers	
	2	Restaurants	
		Other (to be specified):……….	
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*	1	Local	
	2	Regional	
	3	National	
		European	
		International	
c. How are the products labelled *(many answers possible, put a "x" in front and give the name of the label)*		Private label	Name:
		Collective brand	Name:
		Regional label	Name:
		National label	Name:
		European label	Name:
B- Sustainability profile			
a. Put a "x" in front of items presented by initiative's actors themselves through	**Agri-enviromental**		
	*	Biodiversity	
		Preservation of specific species/races	

websites, flyers, promotion events.		Soil erosion
		Water quality
	*	Animal welfare
		Food-miles
		Other important aspects (to be specified):……….
	Socio-territorial	
	*	Regional employment an preservation of rural communities
		Food quality and typicity
		Preservation of landscapes
	*	Mountain (marginal) areas keeping
	*	Resistance to sprawl
		Agri tourism
		Other important aspects (to be specified):……….
	Economic	
	*	Producers' income
		Possible succession for farms
		Farmers' quality of life
	*	Higher net value per unit of product
	*	Higher net value added on regional level
		Other important aspects (to be specified):……….
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)		
<u>C- Institutional support</u>		
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*	1	Local
		Regional
		Sector
		National
		European
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc.... (and opposition?)	The municipality supports the initiative through European financing	
c. Describe institutions and regulations created by the initiative?		

Database of Sustainable food supply chains initiatives (WP2)		
<u>O - General Information</u>		
a. Name of the Initiative	***20. Le vie della pastorizia, per la riscoperta, a passo d'uomo, del nostro territorio***	
b. Type of Products	Sheep-products	
<u>A- Organisation and governance of the "new" supply chain</u>		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	Data not available	
b. What is the farms' size	Small size	
c. Who is the main initiator *(put a "x" in front)*		Producers
		First processors or pakkers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
	*	Environmental associations
		Other associations
d. Describe in a few sentence the main initiator	The WWF (World Wide Fund for Nature) is the most important organisation for growing awareness of the environmental and health problems. It is present in 40 Country.	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
		Regional
		National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	Bellinzago, Novara province, Piemonte Region. The area is characterized by waste natural landscapes, with many sheep's Flocks, and areas with strong archaeological attraction.	
➢ **Size of production**		
a. Tons		
b. Value at consumer level		
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*	*	Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*		Producers' association
		Cooperative
		Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organisation
		Regional public institution (label)
	*	National public institution
		Other (to be specified):
c. describe in few sentences	The most important task of WWF is to limited the degrade of natural system. So	

the operation structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing….	WWF operates to conserve the biodiversity into agri-environmental system, to promotion of a sustainable utilisation of natural sources and to limited the pollution.		
3- Social history of the initiative			
➢ **Birth**			
a. When?	2002		
b. Who?	WWF		
c. Where?	Bellinzago, Novara, Piemonte		
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*			
a. Order to put a number in front	1	Environmental	
	2	Soci-territorial	
	3	Economic	
b. Please precise these first motives, objectives and start difficulties	The project has two goals: the first is historical-scientific to know the sheep-breeding and the sustainable shapes of agriculture economy; the second one would valorise the territory for a sustainable tourism and to make the typical products' sector of the area grow		
➢ **Main historical key events until now**			
a. Precise the main events in the history of the initiative	Study of the transhumance lay-out. Fill in information document with natural map of the area		
➢ **Future: main plans and intentions & bottlenecks**			
a. Describe the key ambitions, challenges in sustaining the initiative	Conservation of territories that are used by the flocks with the aim of the valorization of sheep-breeding like echo-compatible and traditional activity Moreover WWF would like start a political of development of guaranteed local products and it intend to activate itself in order to create a visit structure on the territory through local operating		
b. Describe the main bottlenecks			
4 - Marketing issues			
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*		Direct selling	
		Farmers' markets	
		Specialised stores	
		Big retailers	
		Restaurants	
		Other (to be specified):……….	
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*	x	Local [tourism]	
		Regional	
		National	
		European	
		International	
c. How are the products labelled *(many answers possible, put a "x" in front and give the name of the label)*		Private label	Name:
		Collective brand	Name:
		Regional label	Name:
		National label	Name:
		European label	Name:

B- Sustainability profile		
a. Put a “x” in front of items presented by initiative’s actors themselves through websites, flyers, promotion events.	**Agri-enviromental**	
	*	Biodiversity
		Preservation of specific species/races
		Soil erosion
		Water quality
	*	Animal welfare
		Food-miles
		Other important aspects (to be specified):……….
	Socio-territorial	
		Regional employment an preservation of rural communities
		Food quality and typicity
		Preservation of landscapes
	*	Mountain (marginal) areas keeping
	*	Resistance to sprawl
		Agri tourism
		Other important aspects (to be specified):……….
	Economic	
		Producers’ income
		Possible succession for farms
		Farmers’ quality of life
		Higher net value per unit of product
	*	Higher net value added on regional level
		Other important aspects (to be specified):……….
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)		
C- Institutional support		
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*		Local
		Regional
		Sector
	1	National
		European
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc.... (and opposition?)	The WWF produced the informative materials Province administration supported financially the initiative	
c. Describe institutions and regulations created by the initiative?		

Database of Sustainable food supply chains initiatives (WP2)		
O - General Information		
a. Name of the Intiative	***21. Il Pagliaio, "Fierucola" of organic products***	
b. Type of Products	Organic market Farmers and craftmen Small producers sell their products directly to consumers.	
A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	Farms who are associated with the *ASSOCIAZIONE di SOLIDARIETA' per la CAMPAGNA ITALIANA ASCI (association of solidarity for the Italian countryside*	
b. What is the farms' size	Small and very small size	
c. Who is the main initiator *(put a "x" in front)*		Producers
		First processors or packers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
	*	Other associations: producer association: Tuscany ASCI
d. Discribe in a few sentence the main initiator	The Tuscany ASCI, giving expression to the moral conscience of its associates and in the respect of the uses and traditional customs of the people, through the voluntary service, not for money, has the aim to defend, to reconstruct, to promote and to upgrade the peculiar values, job, characteristics and the physical objects of the Italian rural countryside. This association organises markets of organic and natural products	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
	*	Regional
		National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	A particular market is : *Il Pagliaio* at *Greve in Chianti* (small village in the Tuscany countryside) on the fourth Sunday of each month.	
➢ **Size of production**		
a. Tons		
b. Value at consumer level		
2- Collective organisation of the initiative		
a. What is the type of collectieve organisation *(put a "x" in front)*		Formal private collectie organisation
	*	Open group (code of practices, free entry of new members)
		Club (code of pactices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered accordig to importance)*	*	Produceers' association
		Cooperative
		Consortio or FSC collective private structure without any commercial activity
		Channel captain (prcessing firm, big retail)
		Certification organisation
		Regional public institution (label)

		National public institution
		Other (to be specified):……….
c. describe in few sentences the operation structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing....	The aim is the promotion of the trades and the farms who contribute for environmental protection, in particular way when they have the followings characteristics: ▪ familiar conduction ▪ prevailing production for self-consumption ▪ residence on the country ▪ contained elevated motorization ▪ the adoption of traditional techniques for the cultivations, the breeding and transformation ▪ direct selling ▪ use of and local races or variety of plants, ▪ no use of the products obtained for synthesis ▪ no use of genetically modified plants or animals They have defined the articles of association with a specific code of practices for the producers who want to sell their products trough these markets.	
3- Social history of the initiative		
➢ **Birth**		
a. When?	2001	
b. Who?	9 producers who constituted the ASCI	
c. Where?	Tuscany	
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*		
a. Order to put a number in front	3	Environmental
	2	Soci-territorial
	1	Economic
b. Please precise these first motives, objectives and start difficulties	This manifestation is turned mainly to the farms and familiar activities whose productions are for quantity and quality are not s not compatible in the modern distribution. So they believe in the direct selling of the own productions. Therefore the markets are not only an trade event but also a sharing, comparison moment; they promote and support values like: - approach city-contryside - love for the earth, solidarity - handicraft creativity - conservation and increase of the right and human values of the historical, cultural and environmental patrimony	
➢ **Main historical key events until now**		
a. Precise the main events in the history of the initiative	An other manifestation is the "*Fierucola del pane*" in Florence	
➢ **Future: main plans and intentions & bottlenecks**		
a. Describe the key ambitions, challenges in sustaining the initiative		
b. Describe the main bottleneks		
4 - Marketing issues		
a. What is the distribution channel *(many answers possible, put a number ordered accordig to importance)*	*	Direct selling
		Farmers' markets
		Specilised stores
		Big retailers
		Restaurants
		Other (to be specified):……….
b. What are the relevant conumer markets *(many answers possible, put a number ordered accordig*	1	Local
	2	Regional
		National
		European

to importance)		International	
c. How are the products labeled *(many answers possible, put a "x" in front and give the name of the label)*		Private label	Name:
		Collective brand	Name:
		Regional label	Name:
		National label	Name:
		European label	Name:
B- Sustainability profile			
a. Put a "x" in front of items presented by initiative's actors themselves through websits, flyers, proomotion events.	**Agri-enviromental**		
		Biodiversity	
		Preservation of specific species/races	
		Soil erosion	
		Water quality	
		Animal welfare	
		Food-miles	
		Other important aspects (to be specified):……….	
	Socio-territorial		
		Regional emplyment an preservation of rural communities	
		Food quality and typicity	
		Preservation of landscapes	
		Mountain (marginal) areas keeping	
		Resistance to sprawl	
		Agri tourism	
		Other important aspects (to be specified):……….	
	Economic		
		Producers' income	
		Possible succession for farms	
		Farmers' quality of life	
		Higher net value per unit of product	
		Higher net value added on regional level	
		Other important aspects (to be specified):……….	
b. Possible remarks on the above mentioned items			
C- Institutional support			
a. Which level suport the initiative *(many answers possible, put a number ordered accordig to importance)*		Local	
		Regional	
		Sector	
		National	
		European	
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc.... (and opposition?)			
c. Discribe institutions and regulations created by the initiative?	N.B. ASCI has internal regulations that enable the members to self-certifie their organic production, even if they don't have the formal certification regulated by law.		

Database of Sustainable food supply chains initiatives (WP2)	
0 - General Information	
a. Name of the Initiative	***22. E-commerce of typical products of Abruzzo***
b. Type of Products	Typical products of Abruzzo
A- Organisation and governance of the "new" supply chain	
1- Boundaries of the supply chain and main actors	

➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	31	
b. What is the farms' size	Small-medium size, average: 10 ha	
c. Who is the main initiator *(put a "x" in front)*		Producers
		First processors or pakkers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
	*	Other associations
d. Describe in a few sentence the main initiator	A.R.S.S.A, governed by the Regional Law n°29 dated the 1st June 1996, represents the operating organization of the Abruzzo Region for the promotion and the carrying out of the finalized interventions and services for the development of the agriculture according to the European Union standard, national and regional. This agency, has its legal and administrative offices in Avezzano (AQ) and from the organizational point of view structured into 8 provincial offices sprawling around the four provinces and principal cities of these regions. At it's central headquarters there's a Carrefour desk, used for information and development of the European Union political development actions.	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
	*	Regional
		National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	Abruzzo Region. The regional territory covers 10,794 square kilometres, the majority of which (65.1%, 7,027 square kilometres) is mountainous. 34.9% is constituted by hills. The statistics do not mention the plains. Near the coast, in fact, there are no plains, whereas in the inland there are a few, in the river's valley bottoms and also at high altitudes. The largest plain, the Piana del Fucino, can be considered "artificial" because it was the result of the drying up of the lake Fucino in the last century. The environment, in this region, has always been considered as one of the most important resources and now it can boast the name "Europe's Green Region" thanks to its three national parks (Gran Sasso, Abruzzo, Maiella – Morrone), the regional park of Sirente – Velino, and ten or so natural parks and protected areas combined together to make about 1/3 of the territorial region of 10.794 kms squared	
➢ **Size of production**		
a. Tons	It is difficult to estimate the size of production	
b. Value at consumer level	The level of the prices are higher than in other distributive channels because the products are delivered at home	
2- Collective organisation of the initiative		

a. What is the type of collective organisation *(put a "x" in front)*	*	Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*		Producers' association
		Cooperative
		Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organisation
		Regional public institution (label)
		National public institution
	*	Other (to be specified):ARSSA
c. describe in few sentences the operation structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing....	It's principal functions, carried out also with other units, institutes and universities, regarding the expansion and the realization of applied research projects, experimental and proved production material, transformation and commercialization of agricultural products, of technological innovations, of the formation and the reorganization of the farmer's property, of the promotion and valuation of the agriculture and agricultural food productions. Completing the working picture of the institutional works, maintenance of the hydraulics created by the drying up of the Fucino lake, the management of the agricultural meteorological services, and the specialized technical assistance, carried out in the organization of the experimental and demonstration programs, for the circulation of innovations above all in the agricultural world.	
3- Social history of the initiative		
➢ **Birth**		
a. When?	2000	
b. Who?	ARSSA.	
c. Where?	Abruzzo.	
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*		
a. Order to put a number in front		Environmental
		Soci-territorial
	1	Economic
b. Please precise these first motives, objectives and start difficulties	The initiative, that unites in the portals "Terra d'Abruzzo" the typical principal exemplary Abruzzesi productions, is part of an ampler and articulate project that the Abruzzo Regione, through its own Regional Agency A.R.S.S.A. – has promoted with the finality of innovated spread services on the territory, orientated to the development of the bucolic zones, by means of custom of the Internet net. The plan of E-Commerce, across an system coordinated by A.R.S.S.A. and from a qualified agency in the sector, intends to give visibility and possibility of selling exemplary regional productions that are the expression of history and of the more ingrained traditions of the Abruzzo culture, maintained in time in a synthesis both traditional and modern. The final principal of the plan is that of supporting the economy in the most disadvantaged areas contributing to maintain possible existing productive activities to assure the presence of man in the territory and therefore protecting the environment.	
➢ **Main historical key events until now**		
a. Precise the main events in the history of the initiative	The brand "Abruzzo Quality", the title of which is held by the A.R.S.S.A (Regional Agency for the Services of Agricultural Development), was first started in 1984 and is registered in Italy as n°430501 and the OMPI of Genevre n° 502.918. It is only allowed by the companies whose products (are limited to extra virgin olive oil, olives and wine) reaching, across the specific production applications, high qualitative parameters with respect to those of the vine yards	
➢ **Future: main plans and intentions & bottlenecks**		

a. Describe the key ambitions, challenges in sustaining the initiative	It is understood to offer different opportunities: • to the consumer in all parts of the world the capability of knowing and acquiring productions exemplary Abruzzesi which are difficult to come by on the normal commercial circuits; • to the agricultural firms and the small local craftsman the opportunity to access, in the best possible way, a market that puts aside the geographical limits, this element, that for many represents the greatest connection difficulty to the producers. Across the net also the smaller producers can propose to all the consumers their finite and esteemed productions whose consumption, without this opportunity, would remain in their local circle.	
b. Describe the main bottlenecks	There aren't any bottlenecks	
4 - Marketing issues		
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*		Direct selling
		Farmers' markets
		Specialised stores
		Big retailers
		Restaurants
	1	Other (to be specified): E-commerce
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*		Local
	1	Regional
	2	National
		European
		International
c. How are the products labelled *(many answers possible, put a "x" in front and give the name of the label)*		Private label — Name:
		Collective brand — Name:
		Regional label — Name: "Abruzzo Qualità" brand
		National label — Name:
		European label — Name:
B- Sustainability profile		
a. Put a "x" in front of items presented by initiative's actors themselves through websites, flyers, promotion events.	**Agri-enviromental**	
		Biodiversity
	*	Preservation of specific species/races
		Soil erosion
		Water quality
		Animal welfare
		Food-miles
		Other important aspects (to be specified):……….
	Socio-territorial	
		Regional employment an preservation of rural communities
	*	Food quality and typicity
		Preservation of landscapes
	*	Mountain (marginal) areas keeping
	*	Resistance to sprawl
		Agri tourism
		Other important aspects (to be specified):……….
	Economic	
	*	Producers' income
		Possible succession for farms
		Farmers' quality of life
	*	Higher net value per unit of product
	*	Higher net value added on regional level
		Other important aspects (to be specified):……….

b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)		
C- Institutional support		
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*		Local
	1	Regional
		Sector
		National
		European
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc.... (and opposition?)	ARSSA through investments credit	
c. Describe institutions and regulations created by the initiative?		

Database of Sustainable food supply chains initiatives (WP2)		
<u>O - General Information</u>		
a. Name of the Initiative	***23. Prodotti con amore COOP***	
b. Type of Products	Integrated products	
<u>A- Organisation and governance of the "new" supply chain</u>		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	All farms adopting integrated production methods (suppliers of Coop)	
b. What is the farms' size	Small, medium and big size	
c. Who is the main initiator *(put a "x" in front)*		Producers
		First processors or pakkers

		Trade/wholesalers
		Independent stores
	*	Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
		Other associations
d. Describe in a few sentence the main initiator	Coop (consumers' cooperative), is the biggest Italian retailer company, with 1,320 sale points and 39,000 employed	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
		Regional
	*	National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism …)*	Italy	
➢ **Size of production**		
a. Tons	Data not available	
b. Value at consumer level	The bigger prices	
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*		Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*		Producers' association
		Cooperative
		Consortium or FSC collective private structure without any commercial activity
	*	Channel captain (processing firm, big retail)
		Certification organisation
		Regional public institution (label)
		National public institution
		Other (to be specified):
c. describe in few sentences the operation structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing….	Coop Italia created the hallmark "Prodotti con Amore" ("Produced/Products with Love"). It is a private brand concerning fresh products (fruit, vegetables and beef), which are more sensitive to chemical inputs used in the production process. The products "Prodotti con Amore" must comply with quality standards imposed by Coop Italia to suppliers, which are more strict than those of "conventional" products regarding both the production process (adoption of integrated production methods) and the quality characteristics of the final product, especially the hygiene-health aspects. The "Prodotti con Amore" system required Coop Italia to strengthen the coordination with the other firms of the supply-chain, and a better information management.	
3- Social history of the initiative		
➢ **Birth**		
a. When?	2002	
b. Who?	COOP	

<table>
<tr><td>c. Where?</td><td colspan="3">Italy</td></tr>
<tr><td colspan="4">➢ Main objectives and intended beneficiaries at this time? (please, order)</td></tr>
<tr><td rowspan="3">a. Order to put a number in front</td><td>1</td><td colspan="2">Environmental</td></tr>
<tr><td></td><td colspan="2">Soci-territorial</td></tr>
<tr><td>2</td><td colspan="2">Economic</td></tr>
<tr><td>b. Please precise these first motives, objectives and start difficulties</td><td colspan="3">Within private label, Coop aims at increasing quality standards especially regarding the use of chemical inputs in the agro-food production process. Coop wants to communicate consumers its efforts towards increased safety of “its” products, promoting an overall image of “consumers friendly” firm</td></tr>
<tr><td colspan="4">➢ Main historical key events until now</td></tr>
<tr><td>a. Precise the main events in the history of the initiative</td><td colspan="3">▪ The hallmark Prodotti con Amore was launched by CoopItalia in 1986 for fresh fruit and vegetables
▪ In 1988 the hallmark was extended to fresh meat (beef), and then to processed fruit (juices).
▪ After a period of co-presence with conventional products, Coop decided to leave only Prodotti con Amore products in the stores
▪ in 2001 Coop activated a private label on organic products, and Prodotti con Amore label was cancelled. Nowadays fruit, vegetables and meat traded with Coop brand follow the specifications of Prodotti con Amore. Coop Italia has launched a campaign to ask a new law against the use of pesticide.</td></tr>
<tr><td colspan="4">➢ Future: main plans and intentions & bottlenecks</td></tr>
<tr><td>a. Describe the key ambitions, challenges in sustaining the initiative</td><td colspan="3">Its objective is to reduce the risks derived from the critical points of the production process, thus guaranteeing consumers throughout Italy a production carried out in the best qualitative characteristics, especially from a hygiene-health and nutritional point of view.</td></tr>
<tr><td>b. Describe the main bottlenecks</td><td colspan="3">There isn’t any bottlenecks</td></tr>
<tr><td colspan="4">4 - Marketing issues</td></tr>
<tr><td rowspan="6">a. What is the distribution channel (many answers possible, put a number ordered according to importance)</td><td></td><td colspan="2">Direct selling</td></tr>
<tr><td></td><td colspan="2">Farmers’ markets</td></tr>
<tr><td></td><td colspan="2">Specialised stores</td></tr>
<tr><td>1</td><td colspan="2">Big retailers</td></tr>
<tr><td></td><td colspan="2">Restaurants</td></tr>
<tr><td></td><td colspan="2">Other (to be specified):……….</td></tr>
<tr><td rowspan="5">b. What are the relevant consumer markets (many answers possible, put a number ordered according to importance)</td><td></td><td colspan="2">Local</td></tr>
<tr><td></td><td colspan="2">Regional</td></tr>
<tr><td>1</td><td colspan="2">National</td></tr>
<tr><td></td><td colspan="2">European</td></tr>
<tr><td></td><td colspan="2">International</td></tr>
<tr><td rowspan="5">c. How are the products labelled (many answers possible, put a “x” in front and give the name of the label)</td><td>*</td><td>Private label</td><td>Name: "Prodotti con amore COOP".</td></tr>
<tr><td></td><td>Collective brand</td><td>Name:</td></tr>
<tr><td></td><td>Regional label</td><td>Name:</td></tr>
<tr><td></td><td>National label</td><td>Name:</td></tr>
<tr><td></td><td>European label</td><td>Name:</td></tr>
<tr><td colspan="4"><u>B- Sustainability profile</u></td></tr>
<tr><td rowspan="9">a. Put a “x” in front of items presented by initiative’s actors themselves through websites, flyers, promotion events.</td><td colspan="3">Agri-enviromental</td></tr>
<tr><td></td><td colspan="2">Biodiversity</td></tr>
<tr><td></td><td colspan="2">Preservation of specific species/races</td></tr>
<tr><td></td><td colspan="2">Soil erosion</td></tr>
<tr><td></td><td colspan="2">Water quality</td></tr>
<tr><td></td><td colspan="2">Animal welfare</td></tr>
<tr><td></td><td colspan="2">Food-miles</td></tr>
<tr><td>*</td><td colspan="2">Other important aspects (to be specified): environmental friendly</td></tr>
<tr><td colspan="3">Socio-territorial</td></tr>
</table>

		Regional employment an preservation of rural communities
		Food quality and typicity
		Preservation of landscapes
		Mountain (marginal) areas keeping
		Resistance to sprawl
		Agri tourism
		Other important aspects (to be specified):……….
	Economic	
		Producers' income
		Possible succession for farms
		Farmers' quality of life
	*	Higher net value per unit of product
		Higher net value added on regional level
		Other important aspects (to be specified):……….
b. Possible remarks on the above mentioned items (can results be measured, do initiatives statements represent reality)		
C- Institutional support		
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*		Local
		Regional
		Sector
	1	National
		European
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc.... (and opposition?)	Coop it has given every type of support	
c. Describe institutions and regulations created by the initiative?	Nothing	

Database of Sustainable food supply chains initiatives (WP2)		
0 - General Information		
a. Name of the Initiative	***24. Consorzio della Quarantina***	
b. Type of Products	Traditional potato varieties and products of Genova mountainous area	
A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	50 potato producers	
b. What is the farms' size	Max 10 ha	
c. Who is the main initiator *(put a "x" in front)*		Producers
		First processors or pakkers

		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
	*	Private : Massimo Angelini
d. Describe in a few sentence the main initiator	A researcher of rural history	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
	*	Regional
		National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	The mountainous area behind the town of Genoa, in Liguria region, involving also part of the territory of Alessandria Province (Piemonte Region), Pavia Province (Lombardia Region), Piacenza and Parma Provinces (Emilia-Romagna Region).	
➢ **Size of production**		
a. Quintals	200 quintals in 2003	
b. Value at consumer level	Potatoes are sold to consumers at 2/2.50 Euro/Kg	
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*		Formal private collective organisation
		Open group (code of practices, free entry of new members)
	*	Club (code of practices, selection of new members)
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*		Producers' association
		Cooperative
		Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organisation
		Regional public institution (label)
		National public institution
	*	Other: Consortium of producers, with the following bodies: a president, a director, an administrative council
c. describe in few sentences the operation structure(s)(type, name) and its (their) main missions	Voluntary association of producers, with a disciplinary code of production and a distinctive brand. The *Consorzio della Quarantina* as association has its own statue and its regulations, which determine the features of the farms and of the produce involved.	
3- Social history of the initiative		
➢ **Birth**		
a. When?	April 13th , 2000	
b. Who?	A private researcher (Massimo Angelini), some local producers (20)	
c. Where?	Genova	
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*		
a. Order to put a number in front	3	Environmental
	2	Soci-territorial
	4	Economic
	1	Political
b. Please precise these first motives, objectives and	▪ Political: community holding of biodiversity ▪ Socio-territorial: stimulate repopulation	

start difficulties	▪ Environmental: preserve biodiversity and anthropic environment ▪ Economic: enhance in a precise manner produce, on both productivity and unit price aspects.
➢ **Main historical key events until now**	
a. Precise the main events in the history of the initiative	April 2003, change of statue: Before it was mainly addressed to the conservation of potatoes, now to the enhancement of different local traditional produce.
➢ **Future: main plans and intentions & bottlenecks**	
a. Describe the key ambitions, challenges in sustaining the initiative	▪ Political: recognition of the right of exchanging seeds at local level ▪ Economic: full financial autonomy of the Consorzio, therefore having a production of at least 2000 q. ▪ Socio-territorial: to stimulate profitability of agricultural work in order to increase repopulation
b. Describe the main bottlenecks	▪ Normative: so far the free exchange of seeds is not possible ▪ The seeds they have now are not reclaimed completely, so that it is possible to guarantee full productivity ▪ Technical training

4 - Marketing issues

a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*	*	Direct selling	
	*	Farmers' markets	
	*	Specialised stores	
		Big retailers (they refuse it)	
	*	Restaurants	
		Other (to be specified):……….	
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*	*	Local	
	*	Regional	
		National	
		European	
		International	
c. How are the products labelled *(many answers possible, put a "x" in front and give the name of the label)*		Private label	Name:
	*	Collective brand	Name: Consorzio della Quarantina
		Regional label	Name:
		National label	Name:
		European label	Name:

B- Sustainability profile

a. Put a "x" in front of items presented by initiative's actors themselves through websites, flyers, promotion events.	**Agri-enviromental**	
	*	Biodiversity
	*	Preservation of specific species/races
		Soil erosion
		Water quality
		Animal welfare
	*	Food-miles
		Other important aspects (to be specified):
	Socio-territorial	
	*	Regional employment an preservation of rural communities
		Food quality and typicity
		Preservation of landscapes
	*	Mountain (marginal) areas keeping
		Resistance to sprawl

		Agri tourism
		Other important aspects (to be specified):……….
	Economic	
		Producers' income
		Possible succession for farms
	*	Farmers' quality of life
	*	Higher net value per unit of product
		Higher net value added on regional level
		Other important aspects (to be specified):……….
b. Possible remarks on the above mentioned items		
C- Institutional support		
a. Which level support the initiative *(many answers possible, put a number ordered according to importance)*	1	Local:
		Regional
		Sector
		National
		European
b. Precise the institution and the type of support: laws, subsidies, studies, investments credit, etc.... (and opposition?)	Genova Province: financial support Local administrations and Mountain Communities (as administrative bodies): good relationships	
c. Describe institutions and regulations created by the initiative	1. Consorzio della Quarantina per la Tutela dei Prodotti di varietà e Razze Tradizionali della Montagna Genovese (*Quarantina Consortium for the safeguard of products of traditional varieties and races of the Genovese mountain*), approved on April, 12th 2003; 2. Consortium Statute; 3. Consortium regulations; 4. Criteria of product qualification; 5. Disciplinary code of production.	

Database of Sustainable food supply chains initiatives (WP2)		
0 - General Information		
a. Name of the Initiative	***25. Critical Wine***	
b. Type of Products	wine	
A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	200 wine producers in December 2003	
b. What is the farms' size	Small-medium size	
c. Who is the main initiator *(put a "x" in front)*		Producers
		First processors or pakkers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers

		Consumer associations
		Environmental associations
	*	Other associations: informal group
d. Describe in a few sentence the main initiator	Luigi Veronelli, journalist, writer and "expert" of Italian enology and gastronomy; Marc Tibaldi, journalist and editor-in-chief of the magazine on eno-gastronomy *Veronelli EV*; Maurizio Murari, representative of the squatter social centre[i] *Magazzino* 47 of Brescia (Lombardia region); Pino Tripodi, writer and editor of the publishing house *DeriveApprodi*.	
➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
		Regional
	*	National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism ...)*	Potentially all wine producers in Italy (and abroad) who are interested in improving and diseminate the initiative.	
➢ **Size of production**		
a. Tons		
b. Value at consumer level	Any, provided that the "source price" is identifiable and the chain is traceable	
2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*		Formal private collective organisation
	*	Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members)
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*		Producers' association
		Cooperative
	*	Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organisation
		Regional public institution (label)
		National public institution
		Other:
c. describe in few sentences the operation structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing....	So far the operation structure has been an open group, formed by the initiators and the other private and collective groups that joined the initiative, in form of an assembly. The main mission is launching initiatives that can improve the traceability and the quality of products together, the idea is to make the market become a "source of social relations".	
3- Social history of the initiative		
➢ **Birth**		
a. When?	2003	
b. Who?	Main initiators	
c. Where?	Verona, at the *Centro Sociale autogestito La Chimica* (first public appointment)	
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*		
a. Order to put a number in front	3	Environmental
	2	Soci-territorial
	1	Economic
b. Please precise these first motives, objectives and start difficulties	▪ The economic advantage is inteded for both the producer and the consumer; ▪ The economic objective is not disconnected from the socio-territorial, i.e. quality and traceability, as well as from the environmental aspects.	
➢ **Main historical key events until now**		

a. Precise the main events in the history of the initiative	1. Verona Critical Wine, April 11-13th 2003: Terra e libertà/Critical wine. Sensibilità ribelli/planetarie e agricoltura contadina, Centro Sociale autogestito La Chimica (*Land and Freedom. Rebel/planetary sensitivities and peasant agriculture, Squatter self-managed Centre "The Chemistry"*), concurrent to *Vinitaly*, the main Italian wine fair (Veneto Region); 2. Empoli, June 2003, Centro Sociale autogestito Intifada. 3. Brescia, Festa Radio Onda d'Urto, August 22-24th 2003: Terrà e Libertà/Critical Wine at the annual happening of an important "antagonist" of Brescia (Lombardia Region); 4. Fiera dei Particolari, Centro sociale Leoncavallo, Milano, December 5-7th 2003 (*Particulars fair, Squatter self-managed Centre "Leoncavallo" in Milan)*.

➢ **Future: main plans and intentions & bottlenecks**

a. Describe the key ambitions, challenges in sustaining the initiative	▪ Launching and success of the "source price"; ▪ Improvement of quality of food-chains through traceability; ▪ Put in practice the De.Co. (Towns guarantee of origin).
b. Describe the main bottlenecks	▪ Multinational companies and big industrial groups, who don't have interest to make the market more traceable; ▪ Problems of promotion and visibility; ▪ Involvment of producers only interested in earning more and not in quality production.

4 - Marketing issues

a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*	*	Direct selling
	*	Farmers' markets
	*	Specialised stores
	*	Big retailers
	*	Restaurants
	*	Other: "collective managed markets" (*mercati autogestiti*)
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*	*	Local
	*	Regional
	*	National
	*	European
	*	International
c. How are the products labelled	Not yet	

B- Sustainability profile

a. Put a "x" in front of items presented by initiative's actors themselves through websites, flyers, promotion events.	**Agri-enviromental**	
	3	Biodiversity
		Preservation of specific species/races
		Soil erosion
		Water quality
		Animal welfare
	2	Food-miles
	1	Other important aspects: quality
	Socio-territorial	
	2	Regional employment an preservation of rural communities
	1	Food quality and typicity
		Preservation of landscapes
		Mountain (marginal) areas keeping
		Resistance to sprawl
		Agri tourism

		Other important aspects (to be specified):……….
	Economic	
	2	Producers' income
	3	Possible succession for farms
		Farmers' quality of life
	1	Higher net value per unit of product
		Higher net value added on regional level
		Other important aspects (to be specified):……….
b. Possible remarks on the above mentioned items	In the aim of the organisers the economic objective has to be link with the social, particularly in linking the producer to the consumer.	
C- Institutional support NONE		

Database of Sustainable food supply chains initiatives (WP2)		
O - General Information		
a. Name of the Initiative	***26. Alce Nero (Black elk)***	
b. Type of Products	Organic	
A- Organisation and governance of the "new" supply chain		
1- Boundaries of the supply chain and main actors		
➢ **main actors of the "new" food supply chain**		
a. How many producers are involved	30	
b. What is the farms' size	6 millions euro turnover, 40 employees	
c. Who is the main initiator *(put a "x" in front)*	x	Producers
		First processors or packers
		Trade/wholesalers
		Independent stores
		Big retailer(s)
		Consumers
		Consumer associations
		Environmental associations
		National regulations
		Regional regulations
d. Describe in a few sentence the main initiator		

➢ **Geographic limits of production**		
a. What is Geographic limits of production *(put a "x" in front)*		Local
		Regional
	*	National
b. precise the localisation and describe in few sentences the specific characteristics of the territory *(environment , landscapes, tourism …)*	(From alcenero website) Alce Nero's farm and production plant are set in a beautiful, wild natural environment. On clear days the view from the top of the hills stretches from the mountains to the sea reaching as far as Ancona and Rimini. The area is very rich in wildlife. As you walk through hornbeams, oaks, ash trees and juniper bushes you might see deer and squirrels or spot a buzzard flying overhead.	

➢ **Size of production**	
a. Tons	
b. Value at consumer level	

2- Collective organisation of the initiative		
a. What is the type of collective organisation *(put a "x" in front)*		Formal private collective organisation
		Open group (code of practices, free entry of new members)
		Club (code of practices, selection of new members)
b. What is the operating structure *(many answers possible, put a number ordered according to importance)*		Producers' association
	*	Cooperative
		Consortium or FSC collective private structure without any commercial activity
		Channel captain (processing firm, big retail)
		Certification organisation
		Regional public institution (label)
		National public institution
		Other:
c. describe in few sentences the operation structure(s)(type, name) and its (their) main missions such as : definition of a code of practices, quality control, promotion, research and development, lobbying, contract templates, management of volumes , price fixing….	(from alcenero website) In conjunction with its production activities, Alce Nero has been implementing quality and research policies which account for its good reputation as a well-established and efficient company. Perhaps the most unique and important feature of Alce Nero's work is its cultural and informative activities. These are directed at those customers who are keen to develop a new lifestyle, a more critical way of facing issues such as health and nutrition and, last but not least, the sense of human history. Alce Nero's hills often welcome school-children or groups of people who are interested in learning more about the co-operative's activities, history and natural environment.	

3- Social history of the initiative	
➢ **Birth**	
a. When?	1970
b. Who?	(from Alce nero website, www. Alcenero.it) Early 1970s: Gino Girolomoni, then the young mayor of Isola del Piano, fostered some plans to revitalise the area's ancient rural traditions. These plans included training in organic agriculture and conferences which drew experts, intellectuals and journalists from all over Italy. From the beginning well-known people such as Guido Ceronetti, Sergio Quinzio, the writers Paolo Volponi and Fabio Tombari were involved in the process. Alce Nero co-operative - established on 13th July 1977 and

	thus one of the earliest examples of organic farming in Italy - developed from this social and cultural background.	
c. Where?	Isola del piano (Pesaro, in The Marche region)	
➢ **Main objectives and intended beneficiaries at this time?** *(please, order)*		
a. Order to put a number in front	3	Environmental
	2	Soci-territorial
	1	Economic
b. Please precise these first motives, objectives and start difficulties	(From Alcenero website) Alce Nero's aim was to provide a solution to the problems involved with massive migrations from the country-side. If our ancestors lived for centuries in the remotest parts of our mountainous and hilly areas, without any roads, tap water, electricity, telephone lines and money, why is it so hard for us - with all the above things and more - to devise a type of economy which would enable us to live in those two-thirds of the land which the prevailing Italian mentality considers merely as week-end or holiday resorts?	
➢ **Main historical key events until now**		
a. Precise the main events in the history of the initiative	Starting from this assumption, Alce Nero purchased a patch of land which had not been used for decades, restored an ancient monastery, built a stable, mill and pasta factory. We began rearing cattle, growing cereals which could be sold as such or ground to produce flour or pasta, thus contributing to stopping migration from the poor, marginalised country-side. Farmers were happy to go back to their old jobs and their abandoned homes. New job opportunities were provided to local young people. Twenty years later a large portion of the agricultural land of Isola del Piano had been converted to organic farming. With its 30 members, 40 employees and a turnover of 12 billion Lire coming from processing and sale of organic products (year 2001), Alce Nero has demonstrated that a new type of economy is not only viable but actually sustainable.	
➢ **Future: main plans and intentions & bottlenecks**		
a. Describe the key ambitions, challenges in sustaining the initiative	▪	
b. Describe the main bottlenecks	▪	
4 - Marketing issues		
a. What is the distribution channel *(many answers possible, put a number ordered according to importance)*	*	Direct selling
		Farmers' markets
	*	Specialised stores
		Big retailers
		Restaurants
		Other: "collective managed markets" (*mercati autogestiti*)
b. What are the relevant consumer markets *(many answers possible, put a number ordered according to importance)*		Local
		Regional
	*	National
		European
	*	International
c. How are the products labelled	Not yet	
B- Sustainability profile		
a. Put a "x" in front of items	**Agri-enviromental**	

presented by initiative's actors themselves through websites, flyers, promotion events.	2	Biodiversity
		Preservation of specific species/races
		Soil erosion
		Water quality
		Animal welfare
		Food-miles
	1	Other important aspects: quality
	Socio-territorial	
		Regional employment an preservation of rural communities
	1	Food quality and typicity
	2	Preservation of landscapes
	3	Mountain (marginal) areas keeping
		Resistance to sprawl
		Agri tourism
		Other important aspects (to be specified):……….
	Economic	
	2	Producers' income
		Possible succession for farms
	3	Farmers' quality of life
	1	Higher net value per unit of product
		Higher net value added on regional level
		Other important aspects (to be specified):……….
b. Possible remarks on the above mentioned items	In the aim of the organisers the economic objective has to be link with the social, particularly in linking the producer to the consumer.	
C- Institutional support		

27. Biomense (organic canteens)

A national regulations approved in 1999 stated that food for children should be exempt from pesticide residuals. With a national regulation approved in 2000, organic products were promoted into schools and hospitals. Since then, 6 regional governments (Emilia- Romagna, Friuli, Veneto, Toscana, Marche) have introduced these norms into their regulation. In 2000, there were 155 'organic canteens' (that means that all products are organic') in Italy, most of which in Northern Italy. They establish requirements not only for the type of food, but also set standards to the service, such as the menu (less animal proteins and more vegetables) and the introduction of satisfaction surveys.
The limits to the development of these initiatives are linked to the level of coordination of organic producers. As the volumes required are very high, not in all regions it is possible for producers to integrate themselves in consortia to supply the demanded quantities with a sufficient continuity.

Summary of FSC Initiatives – Italy
(Annex 2)

Introduction 1

Table 1: Criss-crossing of Italian FSC Initiatives and UK typologies 2

Table 2: Classification by (UK) typologies of Italian FSC Initiatives 4

Rational of the typologies used 5

1. Local/Regional valorisation 5

2. Producers adding value and/or regaining some control 5

3. Processors looking for a quality niche 6

4. Cooperative distribution, marketing and processing 6

5. Local SFSC, specialised outlets 7

6. Development of quality trademarks/hallmarks 7

7. Large retailer / supermarket initiatives 7

8. Food safety, quality assurance and traceability 8

9. Organic Certification 8

10. Ethical/Philosophical 8

11. Facilitatory/Promotional 9

12. Public procurement 9

13. The Internet 9

Introduction

The summary of FSC Italian initiatives has been based on the grid of typologies provided by the UK partner in the Overview of initiatives in tabular form, similar to the one used by UK to settle their initiatives according to typologies.

On the one hand, that classification can ease the comparison among different countries, but on the other hand it requires to link initiatives specific to a certain country in typologies that are not always representative.

In order to allow both the comparison and the appropriateness of the typologies used to classify the initiatives, here we refer to the (UK) typologies, while explaining what they mean for the Italian case.

Most of the initiatives can be recognised under more than one typology, as it is possible to observe in Table 1. In order to reconduct the initiatives to only one typology we have tried to consider what the main feature of the initiative was, and therefore we have classified the initiative. The consequent classification can be visualised in table 2.

In the attempt of analysing the Italian overview of initiatives, provided in Annex 1, we have considered the main typologies representing the Italian initiatives, analysing their main features and their connections with other typologies.

Table 1: Criss-crossing of Italian FSC Initiatives and UK typologies

		Local/Regional valorisation	Producers adding value and/or regaining some control	Processors looking for a quality niche	Cooperative distribution, marketing and processing	Local, SFSC, specialised outlets	Development of quality trademarks / hallmarks	Large retailer/supermarket initiatives	Food safety, quality assurance and traceability	Organic certification	Ethical / Philosophical	Facilitatory or promotional	Public procurement	The Internet
1	Biodomenica									X		X		
2	Marchio Consorzio di tutela dei prodotti pastorali dei parchi d'Abruzzo	X							X	X				
3	Shortening the beef chain in Emilia Romagna	X	X							X				
4	The traceability system for the Canaveis cheese (Piemonte)	X	X						X			X		
5	Supermercati Carrefour: filiera di qualità e Terre d'Italia						X	X						
6	Carta di qualità del Parco Nazionale delle Dolomiti Bellunesi	X					X					X		
7	"Granarolo" and "Centrale del latte di Milano"				X			X	X					
8	G.O.D.O: Gruppi Organizzati di Domanda e Offerta (GAS)		X			X			X	X	X			
9	Il Canestro (Campania)		X						X	X				
10	Organic slaughter houses (Emilia Romagna)		X	X					X	X				
11	Marchio di qualità per le aziende del Parco nazionale del Pollino	X					X							
12	*Melinda* and *Trentina*: (Trentino Alto Adige)		X		X		X	X						
13	GMO free, L.R. 53/00 (Tuscany)	X							X		X			

		Local/Regional valorisation	Producers adding value and/or regaining some control	Processors looking for a quality niche	Cooperative distribution, marketing and processing	Local, SFSC, specialised outlets	Development of quality trademarks / hallmarks	Large retailer/supermarket initiatives	Food safety, quality assurance and traceability	Organic certification	Ethical / Philosophical	Facilitatory or promotional	Public procurement	The Internet
14	Informatic integrated system for the traceability of fruit and horticulture products								X					X
15	Presidio Slow Food - Pecorino Montagne Pistoiesi (Tuscany)	X				X			X		X	X		
16	Typical and regional agro-food products in Lazio Region	X							X			X		
17	Marchio della farfallina (Tuscany)	X					X	X				X		
18	Purpose for the valorisation of the Scrisi and Cutà plateau (Calabria)	X	X											
19	Valle del Biologico (Liguria)	X								X		X		
20	Le vie della pastorizia (Piemonte)	X										X		
21	Il Pagliaio and the Fierucola, markets of organic products (Tuscany)		X						X	X	X	X		
22	E-commerce of typical products of Abruzzo	X										X		X
23	Prodotti con amore COOP						X	X	X					
24	Consorzio della Quarantina	X	X				X		X		X	X		
25	Critical Wine		X				X		X		X			
26	Alce Nero				x									
27	Biomense (organic canteens)												x	

Table 2: Classification by (UK) typologies of Italian FSC Initiatives

Local / Regional valorisation	Producers adding value and/or regaining some control	Processors looking for a quality niche	Cooperative distribution, marketing and processing	Local, SFSC, specialised outlets	Development of quality trademarks / hallmarks	Large retailer / supermarket initiatives	Food safety, quality assurance and traceability	Organic certification	Ethical / Philosophical (Political)	Facilitatory or promotional	Public procurement	The Internet
1. Marchio Consorzio di tutela dei prodotti pastorali dei parchi d'Abruzzo 2. Shortening the beef chain in Emilia Romagna 3. Traceability system for the Canaveis cheese (Piemonte) 4. Carta di qualità del Parco Nazionale delle Dolomiti Bellunesi 5. Marchio di qualità per le aziende del Parco nazionale del Pollino 6. Typical and regional agro-food products in Lazio Region 7. Valorisation of the Scrisi and Cutà plateau (Calabria) 8. Le vie della pastorizia (Piemonte)	1. G.O.D.O: Gruppi Organizzati di Domanda e Offerta 3. Consorzio della Quarantina	1. Mukki	1. Alce Nero 2. Il Forteto 3. Salamita 4. Cooperativa Agricola 8 marzo 5. Cooperativa Valli Unite	1. Il Pagliaio and Fierucola, markets of organic products (Tuscany) 2. Organic Supermarkets and franchaising chains: Naturasì, Bottega e Natura, Biodin.	1. Melinda and Trentina collective brands (Trentino Alto Adige) 2. Marchio della farfallina (Tuscany)	1. Supermercati Carrefour: filiera di qualità e Terre d'Italia 2. Granarolo and Centrale del latte di Milano 3. Prodotti con amore COOP	1. GMO free, L.R. 53/00 (Tuscany) 2. Critical Wine	1. Il Canestro (Campania) 2. Organic slaughter houses (Emilia Romagna) 3. Valle del Biologico (Liguria)	1. Presidio Slow Food - Pecorino Montagne Pistoiesi (Tuscany) 2. Botteghe del commercio equo e solidale	1. Biodomenica 2. Strade del vino 3. Cantine aperte, frantoi aperti, stalle aperte, etc.	1. Organic canteens	1. Informatic integrated system for the traceability of fruit and horticulture products 2. E-commerce of typical products of Abruzzo

Rational of the typologies used

1. Local/Regional valorisation

Regional differentiation, as stressed in different parts of the Italian National Report, has always been a strong peculiarity of Italian countryside. Diversity of Italian territory and culture has, through the time, brought to a twofold trend. On the one side the difficulty of Italian agriculture to adapt to the industrialized model of development, and on the other side the conservation of local specificity, with the varieties of local knowledge and landscapes embodied in it.

That represented a fruitful ground for the development of alternative patterns of development, where local administrative bodies and local active environmental associations could link economic with environmental friendly goals.

Most of the initiatives classifies in this typology are related to that background, and are linked to three different kind of initiators:

A) Natural Parks: Parco d'Abruzzo, Parco Dolomiti Bellunesi, Parco del Pollino.

Because the initiative is under the umbrella of a protected area, the valorisation of the local is strictly related to the conservation of the *local natural resources*, so that economic initiatives are related to the sustainable use of local resources.

In these cases the valorisation of the local is also linked to *quality and typical produce*, because the traditional breeding of the area. Therefore valorisation of the local embodies also quality production, through the enhancement of typical produce within the territory of the park. To that aim these Parks have also introduced a *quality trademark*, which recalls the value of a production in the respect of natural resources and the local knowledge in breeding and processing. In that sense also *organic products*, promoted by the initiative of Parco d'Abruzzo, are part of a more extended set of quality and typical products.

B) Local administrative bodies: *Comunità Montana* (Mountain community) for Canaveis cheese, Regional government for Lazio typical agro-food products.

In both cases valorisation of local/regional products are related ,ore generally to promotion of the territory under the government of the administration. Even if, for the Canaveis cheese, *organic production* is indicated, the range of promoted products cover all supplies which are recognisable as *typical* of that area or region. In that sense valorisation of local produce can be a strategy to strengthen the identity of a territory, and therefore to propose a clearer image to tourists and visitors.

C) Private organisations: the initiators are *Legambiente*, an environmental organisation, and *Aiab*, a cultural association promoting organic agriculture, in *Scrisi and Cutà plateaux* (Calabria), WWF (World Wide Fund for Nature) in Piemonte, for *Le vie della Pastorizia*, and *Coldiretti*, the main Italian farmers' union, for the *Beef chain in Emilia Romagna*.

In these initiatives the starting point is the valorisation of local produce, in relation to the enhancement of local environment or local breeds. Here also, as in other cases, the focus is both on environment, that is conservation of resources, biodiversity and landscape, and on local culture, intended as traditional knowledge embodied in breeding or in processing. As a consequence, enhancement of local produce or breeding is also aiming at giving control on the production process back to producers. That kind of strategy intends to revitalise local economy in a sustainable manner, so that local knowledge can be valuable again, and can be employed in newly profitable activities.

2. Producers adding value and/or regaining some control

This category refers to initiatives that present a weak power of the processor/retailer ring of the supply chain, so that producers are managing more directly the chain and therefore the relationship with consumers.

These are often cases of *short supply chains*, with direct contact between consumers and producers, what implies a greater *transparency* of the production process and of price creation. The latter represents an advantage for both the producers, who can more easily display the value of their produce, fetching a better price, and for consumers, who can develop a better trust towards the food they buy and the producers who are involved.

As it is usually the case for direct selling and direct contact between producers and consumers, also the categories of *quality* and *traceability* are into play, because of the valorisation of organic or special products, and because the short supply chain ease to recognise the further steps the product has gone through before its final sale.
Finally, the typology of producers regaining control has often an underlying *ethical, philosophical*, or even *political driving force*, because the idea of producers regaining control of the chain is often part of a wider system of thought. In order to make real those ideas these initiatives often present a *code of practices* for the members of the organisation.

The features described above can be found in all three initiatives documented under these categories:

- *GODO*, or *GAS* (*Gruppi di acquisto solidale*), are groups of buyers who, referring to ideas of equity, health and environmental friendly agriculture, establish direct contact with producers for the periodic purchase of organic products. With direct contact both producers and consumers can monitor the chain, and together they create a sort of "virtual network" (similar to the one of internet) for production and consumption of organic food, or "virtual specialised outlets", because the purchase doesn't happens in traditional shops.
- The *Consorzio della Quarantina* is also, as the other initiatives of this typology, a new network of producers, based on strong political/ethical ideas, where strengthen farmers position vis à vis other actors of the chain is part of a wider project. Starting again to breed ancient (and almost disappearing) varieties of potatoes has been linked to repopulation of marginal areas, therefore a renewed economic activity has been related to a sustainable use of natural resources. But the underlying idea, according to the main initiator, is the political project of "giving back the property of biodiversity to local community", and therefore the added value of the potatoes produced is not only in economic, but also in social, environmental and political terms.

3. Processors looking for a quality niche

Italy lacks of significant examples of processors who undertook particular initiatives so to address a niche market, while processing has been usually a key element for Italian *typical* and *regional* products, as it appear evident for the case of *Parmigiano Reggiano* cheese and *prosciutto crudo di Parma e San Daniele*.

Nevertheless recent trends in consumers demands and the increasing competition in the new food supply chains led also processors to try to emerge within the supply chain with their peculiar and quality methods and techniques. A good example is the *Centrale del Latte di Firenze, Pistoia e Livorno*, the public company which collect and process milk and dairy products for a large part of the Tuscany territory. This company started since the 1960s to use a distinctive label, *Mukki*, that rendered easily recognisable their fresh and packed milk. From the 1980s they started to use the same label for different dairy products and added a new organic line of production, so that nowadays they are able to reach diverse channels of distribution.

4. Cooperative distribution, marketing and processing

Cooperatives have been traditionally an important form of company organisation in the Italian work market, and in agriculture as well. Even so segmentation of supply chains hampered the spreading out of traditional cooperatives in the food marketing and distribution field, so that producers' cooperatives mainly remained focused on the production domain, or they even disappeared after the 1970s.

On that background a counter-tendency developed in the organic sector, where cooperatives could more easily overtake the problem of connecting different parts of the production process in a new supply chain. As a consequence it is possible to find in Italy cooperatives that started to practice organic agriculture in the 1970s, when processors and distribution channels in the organic sector didn't exist, and that concentrate all the phases of the production process within the cooperative. Just to give some examples: *Il Forteto* in Tuscany, *Cooperativa agricola 8 Marzo*, in Veneto region, *Salamita* in Sicily, *Cooperativa Valli Unite* in Piemonte.

Among those cooperatives born in the 1970s a few were able to extend their range of action, so to build completely new supply chains. One of the most important examples is *Alce Nero*, started as cooperative of production in 1977 and step by step grew as processors, marketing and distributive company, so that nowadays *Alce Nero* products can be find in most of specialised organic outlets.

5. Local SFSC, specialised outlets

Typical and *quality* produce are often sold in small and specialised shops, both in urban and rural areas (the latter usually to promote local typical products), but there are no widespread chains of specialised outlets, a part from the organic sector.

Probably the most important example of that are *Pagliaio* and *Fierucola*, both local markets organised by *ASCI* (*Associazione di Solidarietà per la Campagna Italiana*), a farmers' association that brings together producers who held generally small and organic farms. The initiative of small markets aims at giving farmers more power of control on the supply chain, and the possibility of fetching a better price through the direct contact with consumers, therefore also promote the guarantee of quality and traceability. Nevertheless ASCI is a farmers' association which, through diverse initiatives, carry on a political claim, based on the defence of small producers and against the obligation of certifying organic production by law (and actually ASCI organic producers use self-certification, based on an internal code of practices and disciplinary of production).

Organic franchising chains emerged from the 1990s on, and constitute nowadays 20% of the outlets specialised in organic products. The bigger chains are *Natura Sì* and *Bottega e Natura*, but other smaller chains are emerging, such as *Biodin* in Piemonte and Liguria regions.

6. Development of quality trademarks/hallmarks

This typology includes initiatives that aim to enhance local or special produce through the development of a new and distinctive trademark. Trademark is important because it is easily recognizable by consumers among different produce, and then it is suitable to be used in the large retail system. Moreover, the trademark can powerfully embody distinguishing values related to quality, health, tradition etc. which can be particularly appealing to consumers when they can't have direct contact with producers. Finally trademarks and hallmarks can be a good strategy for producers to emerge in a competitive market.

Among the initiatives depicted in the catalogue the cases of collective brand *Melinda and Trentina* for apples, and the case of *Farfallina* brand for cereals and pasta belong to this typology.

The first are two brands for marketing apples in Trentino Alto Adige region, created by cooperatives of producers aiming at valorise the quality production of their area and of those special kind of apples. Cooperatives manage part of the supply chain, but the quality trademark enabled them to reach the GDO channels for distribution, and therefore the added value the quality trademark gave these products has been considered as the key factor.

The latter is a trademark created by the joined initiative of a regional agency and a producers' association (based on a regional law of Tuscany), aiming at guarantee the respect of a code of practices in production and processing of all different actors of the chain. The products with the *Farfallina* label are mainly distributed through supermarkets also involved in the initiatives. In this case the trademark allows to assume all the different guarantees about quality and health in a unique and distinctive trait.

7. Large retailer / supermarket initiatives

Large retailer and supermarket chains in the last years have acknowledged the importance consumers give to health security and quality production, as well as other values, in relation to food. Therefore also these actors have more and more introduced in their stores lines of products promoting such attributes. Furthermore some of them tried to involve also other actors of the supply chain, like producers or processors, so to give proof of a greater traceability, but always under the supervision of the large retailer company. That has important consequences on the competition point of view, because GDO is becoming more and more competitive in the arena before occupied only by small producers and retailers.

Carrefour, a large retailer company, developed a quality trademark which valorise typicality and quality of produce, which is used in the supermarkets of its chain.

Granarolo and Centrale del Latte di Milano developed a sector of produce, of milk and eggs, where traceability should be guarantee. To that aim they also involved cooperatives of producers and processors, but because of the long chain it is under question at what extend producers can have power on the chain against big retailers.

Prodotti con amore is a produce line introduced by COOP, a consumers' cooperative and one of the biggest retail company in Italy. That line seeks, as other quality marks or produce lines of big retailers, at distinguishing special productions within the supermarket chain, and to promote the ethical performance of the company.

8. Food safety, quality assurance and traceability

Food safety, quality assurance and traceability became urgent claims since scandals and food emergencies showed up in the 1990s, so that most of the SFSC arose in that period, and here described, intend to fulfil those requirements. Because of that, only initiatives that present a particular strong or effective approach towards safety, quality and traceabnility have been inserted in this typology.

GMO free Regional Law (Tuscany) n. 53/2000 is of a particular interest because it is a regional government body that took the initiative on a very controversial theme, *Genetic Modified Organisms*, in spite of national and EU regulations. Because of that, regional government has also taken a clear ethical position, because in politics and science GMOs are still under discussion. This initiative is particularly effective in guarantee food safety and quality assurance, because ban from the regional territory GMO cultivations and products, and also propose controls in order to make the law respected.

Critical Wine is a recent initiative, which so far collected few hundreds of wine producers in "alternative" fairs, and proposed some possible further initiatives towards traceability, but as part of a wider project with ethical and political implications. The most relevant proposal in this concern is the "source price", which is the average price producers are available to sell their products in direct selling: the goal is to reach a "traceability of price", in addiction to the "traceability of products", through the indication of the source price on the label of the final product.

9. Organic Certification

As already underlined in some points of the report, organic production appeared to be one of the most important "alternative" sector of production in the last decade in Italy. In that period Italy introduced many new regulations at regional and national level, joining the existent European regulations, in order to manage the new emerging sector. Therefore nowadays organic products cane be certified by different private organisations, but under the umbrella of national government regulations and controls.

Because of the background depicted above, in this typology we have decided to insert only initiatives which improve, in different ways, organic certification, linking it to some other factor, or those that don't present other relevant feature than organic certification.

Il Canestro is an interesting initiative because try to improve traceability in the organic food supply chain, by creating direct contact between producers and consumers; *organic slaughterhouses in Emilia Romagna* can also improve traceability in the organic chain, because this step is often lacking for organic produce; *Valle del biologico in Liguria* is remarkable because the initiative tends towards conversion to organic supply chains for en entire territory.

10. Ethical/Philosophical

although initiatives included in other typologies bear on ethical or political reasons, such as G.O.D.O., Fierucola and ASCI, Consorzio Quarantina, GMO free, Critical Wine and most of organic produce initiatives, in this typology we inserted the initiatives that not only were born for ethical reasons, but that succeeded because of the ethical values embedded in their products.

As documented in Annex 1, *Presidio Slow Food –Pecorino Montagne Pistoiesi* aim at enhancing a typical product of Tuscany and at reinforcing the producers power within the supply chain, but all that rise from the original idea of Slow Food. That means that the diverse initiatives taken bear out the thought of sustaining the "culture of food and wine" against the standardized routine of "fast food".

The same happens for Fair Trade (*Commercio equo e solidale)*, spread in Italy mainly by the *Botteghe del Mondo* (World Shops): this is an interesting case of specialised outlets, but the ethical principle that link producers, retailers and buyers is the intent of building international supply chains with the greatest power to producers (of PVS) and the least to processors and distributions companies.

11. Facilitatory/Promotional

This typology is rather close to “local valorisation”, but its specificity is the focus on communication tools that should facilitate closer relationships between consumers and producers.

In that sense *Biodomenica* is a relevant initiative, because creates around organic theme new small markets spread on the territory, exploiting one of the most traditional way Italian know to meet producers (weekly markets can be found in most of Italian villages, and so far still small producers have access to them). Moreover that initiative gives more visibility to producers and to organic, which is usually a market reached only by the most attentive consumers.

It is possible to find many other initiatives similar to Biodomenica, spread on the Italian territory: *Strade del vino* (Wine routes), *Cantine aperte* (Open Cellars), *Stalle aperte* (Open stables) and *Frantoi aperti* (Open oil mill). Those are all initiatives based on a theme and aiming at bringing consumers closer to farmers’ or producers realm, by “opening the doors” of farms to visitors. These kind of initiatives are clearly directed to the emerging rural tourism, and ease the possibility for rural tourists to recognise the spots of interest in a particular area o during a particular period of the years.

12. Public procurement

Despite the fact that this occurrence is rare in Italy, it is possible to quote a significant example that present similar features. *Organic refectories/canteens* is nowadays a rather spread initiative in North Italy, usually started on the proposal of parents’ or consumers’ associations and often supported by local administrative bodies, which usually are the financial institutions for schools.

The initiative first started in Cesena, a town in Emilia-Romagna region, with direct involvement of the Municipal administration and through a special project called *Pappamondo*; it had so much success that nowadays 46 schools of that Municipal territory are furnished with organic meals.

Another important improvement to the initiative came from Tuscany region, which facilitated the introduction of organic meals in schools through the regional law n. 18/2000.

13. The Internet

Internet represents an important means for both giving visibility and creating alternative channels of purchase: so far in Italy Internet has been used more for the first goal than for the second one, even if e-commerce is increasing.

The *Development of informatics’ integrated system for the traceability of fruit and horticulture products* has been initiated by UNAPROA, *Unione Nazionale Associazioni Produttori Ortofrutticoli Agrumari e di Frutta in guscio*, a producers’ association gathering around 75.000 members, with the aim of developing informatics methods and strategies to support and control traceability. This is a very recent initiative, that was possible thanks to the involvement of such a big association, in addiction to the support of MiPAF (Ministry of Agriculture and Forestry).

E-commerce of typical products of Abruzzo, instead, was initiated on 2000 by A.R.S.S.A (Regional Agency for the Services of Agricultural Development) as an attempt to extend the purchase of typical products of Abruzzo Region, labelled ”Abruzzo Quality”, through e-commerce.

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[i] The Italian word *Centro sociale* refers to a place, usually located in town, where young people, but not only, organise different activities, with both a social and political aim. These centres have been highly representative of the "antagonist culture" before, and more recently of the most extreme part of the "anti-globalisation movement". There is no precise translation in English, since *Squat* refers to people who, occupying abandoned buildings, act mainly for personal reasons and are not always linked to a political movement.