

The Italian Plan 2013-2016 to Develop the Official Plants Sector

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Abstract

The aim of this note is to inform, but to 'not strictly insiders', the interventions that will be planned in Italy to develop and support official plants sector (Plan of the sector of Official Plants 2013 - 2016). This note is structured as follows: the introduction outlines the context within which it developed the plan for the sector, while the following paragraphs are, respectively, dedicated to the description of the official plants sector and analysis and commentary of the Italian Plan. The synthesis of the findings from the analysis of the Plan is in the Conclusion. This first analysis will follow the study of interventions aimed at the development of MAPs in other European countries.

Keywords: Official plants; MAP; Plan; Italy; Development; Research

Introduction

In Italy the statistical data show the positive trend of the consumption of official plants and a renewed interest of public institutions [1,2]. In the last decade it led to the development of the processing and marketing, but did not have equal effect on the crop. In fact, about 70% of the raw material is imported. Why? It is the price the determining factor. The domestic production, which recognizes high-quality, does not compete with the price of similar production of the Eastern Europe, the Mediterranean basin, or even of Central and South America. The above observations motivate the choice of planning at the national level, interventions to develop the sector and also this short note.

The Official Plants Sector in Italy

Production in Italy, year 2010. The cultivation of MAPs involved 2,938 farms and a surface of 7,191 hectares. The medium size was approximately 2.5 hectares and increased from 2000 to 2010 (the surface increased more than 200%, while the number of farms decreased of 29%). It is to underline that more than 2,900 hectares were 'organic' (41% of total surface with official plants) [2]. Primary production is concentrated to 67% in Piemonte, Emilia-Romagna and Marche regions [2]. The last *Italian Agricultural Census* 2010 shows the increasing of surfaces and farms with MAPs in Piemonte and Valle d'Aosta (Northwest of Italy), Trentino-Alto Adige and Friuli (Northeast), Emilia-Romagna and Marche (Central) regions [2].

Exchanges [2]. In the year 2011, Italy imported approximately 161 million tons equals to 999 million euros of official plants and its derivatives (22.8% odoriferous substances for non-food industry, 30.5% odoriferous substances for the food industry), more than 50% from non-EU countries; the exports involved 82 million tons equals to 413 million euros (27.0% vegetable saps and extracts, essential oils 19.3%, 15.6% odoriferous substances for the food and beverage industry), for two thirds directed to EU countries. Both imports and exports increased in the period 2000- 2010. The supply-chain can be described through the operators as follows [2,3].

-Farms specialized (300-400, estimated data), or not. Specialized farms are in traditional areas of production: Piemonte Region, Provinces of Cuneo and, Municipalities of Moretta, Pancalieri e Savigliano, 'Mint of Pancalieri'; areas between Puglia and Basilicata regions, and in the Sicily Regions.

-'Integrated farms', also called '*a ciclo chiuso*' (closed cycle,) because produce and process and market (herbs, essential oils, etc.). They are approximately one hundred.

-Wholesale. The most significant companies are about fifteen, with a market share of 80%. Many wholesalers, including companies of Germany and France, are also processors.

- Industrial companies that produce semi-finished and/or products for final consumption (food, cosmetics, pharmaceuticals, etc...) and are about 2,000 (estimated data).

-Retailers. Include: health food stores (4,500), pharmacies (17,927) and drugstores (2,398), GDO corner (292), SPA, farmer markets, other (restaurants, fitness centers, etc.).

In general, the examined sector shows: a) strengths related to the high quality of domestic products, the increase in consumption and in the export; b) weaknesses due to lack of legislation and, at the level primary production, poor organization of producers and small size of farms with high production costs [1-3].

The Plan for the Official Plants Sector

The Plan covers the years 2013-2016 and focuses, in the second part, on the objectives [2]. The main objective is to increase the competitiveness of the whole sector with actions at the national, regional and local level. In particular, it is the primary production that requires intervention 'targeted,' and the update of the National Law 6 January 1931, No. 99 that regulates the cultivation and collection of official plants [1,2,5,6]. From the legislative point of view it is also necessary to update and harmonize the regional laws [6]. To improve the knowledge of the sector it is necessary to collect statistical data through: a) *ad hoc* surveys for the collection of data, and b) the updating of the statistical classification of products / sectors of activities that do not reflect the current commercial reality. Then are detailed more specific objectives (principals) that would allow: a) farmers to access to EU funding regulated by the Common Agricultural Policy (CAP), with interventions similar to those of the flower sector b) include the

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Received January 29, 2014; Accepted February 26, 2014; Published March 03, 2014

Citation: Barbieri C (2014) The Italian Plan 2013-2016 to Develop the Official Plants Sector. Med Aromat Plants 3: 153. doi: 10.4172/2167-0412.1000153

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Plan actions in the Rural Development Programmes of the EU [6]. The Plan proposes measures to enhance domestic production (i.e. trademarks, certification), national actions of communication and promotion and improvement of the distribution system. This last aspect is of importance at the level of primary production and provides for the creation of 'Centers of primary processing' (economies of scale), and the formation of Associations, Cooperatives and Consortia of producers. The key issue is to encourage the young people get into the sector, particularly primary, and support the export-oriented firms. Moreover, the Plan expected to create a 'National Observatory on prices and statistics' at the Ministry of Agricultural, Food and Forest Policies.

Finally, the Plan gives space to the research activities. It is necessary to coordinate public and private research, i.e. through the establishment of 'Centers of excellence' that provide support and services, i.e. logistics, to producers. The lines of research include: development of certified seed production to reduce the import and to better check the quality of raw materials; manufacture of machines for production and collection (decrease of the cost of production); preservation of germplasm, natural and indigenous; development of plant protection products suitable for 'natural productions' as officinal plants that shall not contain chemical residues. The financing of actions: there are no direct funding but only indirect, arising from the measures of the Rural Development Programmes (regional level in Italy) using the EU funds [1,4,6].

Conclusion

The increase in the consumption of 'everything that is natural' favored the resumption of production of officinal plants in Italy. In the last decade the quantities produced and exported, increased and expanded the average farm size. The weakest part of the chain is still

the primary production. There are some large farms, but generally they have small size, with a negative effect on the cost of production. The Plan focuses on the objectives and action to improve the competitiveness of domestic production: a) modernize and harmonize the legislation; b) enhance the knowledge of the sector (statistical data); c) support the development of Association of farmers and the reduce production/processing costs.

Acknowledgment

The Author is grateful to the Working Groups of ISMEA and of Ministry of Agricultural and Agro Food Policies of the Italian Republic. The documents produced by them, 2 and 6 of the References, have enabled us to write this note.

This work was carried out with funding of the University of Torino (Local Research Funds, 2013).

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