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L'INNOVAZIONE
HA SASSO FORTI



Regione
Lombardia

ORGANIC PRODUCTIONS PDO AND PGI FOOD PRODUCTS IN LOMBARDY

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01

ORGANIC PRODUCTIONS IN LOMBARDY

Operators in the organic sector in Lombardy and importance at a national level

Five-year period 2019-2023

- The number of exclusive organic producers in Lombardy over the last five years has fluctuated between a minimum of 1341 in 2021 and a maximum of 1500 in 2019. In 2023, there were 1443 exclusive producers (-2.6% compared to 2022).
- The number of exclusive processors also decreased slightly in 2023, falling from 1127 in 2022 to 1086.
- However, the number of producer-processors increased from 525 to 551, thus helping to keep the overall number of total producers (1994 in 2023, 13 fewer than in 2022) and total operators substantially stable (3202 in 2023, 58 fewer than in the previous year).
- In 2023, the area under organic cultivation in the region also decreased slightly, settling at approximately 53,760 hectares, equal to 2.2% of the national total.
- The role of the regional production system at a national level deserves attention, especially for the share of exclusive processors (11.2% in 2023) and importers (21.3% in 2023). The region is therefore characterised above all by its role in the processing and marketing of organic products.

Contribution in the number of operators from Lombardy to the national organic sector in 2019-2023

	2019	2020	2021	2022	2023
LOMBARDIA					
Produttori esclusivi (n.)	1.500	1.453	1.341	1.482	1.443
Preparatori esclusivi (n.)	1.133	1.126	1.100	1.127	1.086
Produttori-preparatori (n.)	498	533	510	525	551
Importatori* (n.)	107	117	127	126	122
Operatori totali	3.238	3.229	3.078	3.260	3.202
<i>di cui produttori</i>	1.998	1.986	1.851	2.007	1.994
Superficie (ha)	56.556	52.217	50.604	54.180	53.758
LOMBARDIA/ITALIA (%)					
Produttori esclusivi (n.)	2,6	2,5	2,4	2,2	2,1
Preparatori esclusivi (n.)	11,8	11,7	11,6	11,7	11,2
Produttori-preparatori (n.)	4,2	4,3	3,9	3,8	3,8
Importatori* (n.)	20,3	21,5	21,8	21,6	21,3
Operatori totali	4,0	4,0	3,8	3,5	3,4
<i>di cui produttori</i>	2,8	2,8	2,6	2,4	2,4
Superficie (ha)	2,8	2,1	2,5	2,3	2,2

(*) Importers who also carry out production and preparation activities are included.

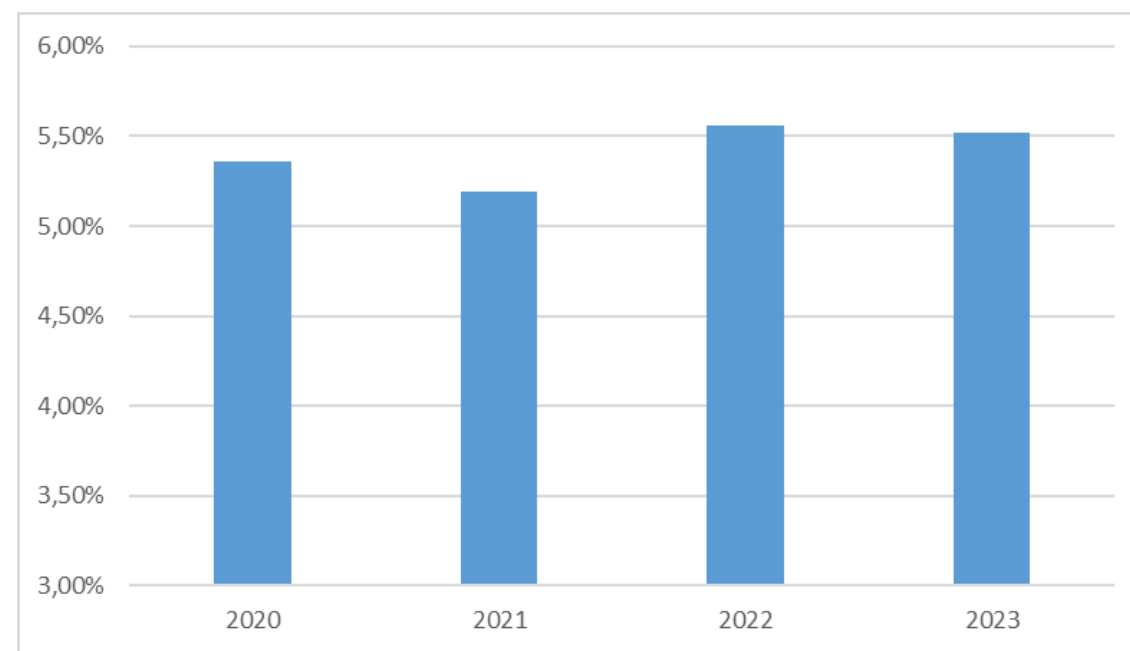
Source: SMEA Elaboration on SINAB data

Share of organic surfaces in Lombardy

Percentage of Utilised Agricultural Area recorded in the 2020 census

- The share of UAA destined for organic production in 2023 remains at 5.5%.
- The 25% target set in the FARM to FORK is still a long way off.
- The percentage share has been relatively stable in recent years.
- The average size of organic farms in Lombardy reached 27 hectares in 2023, compared to the national average of 29.2 hectares.

Share of organic area on UAA in the Lombardy region from 2020 to 2023

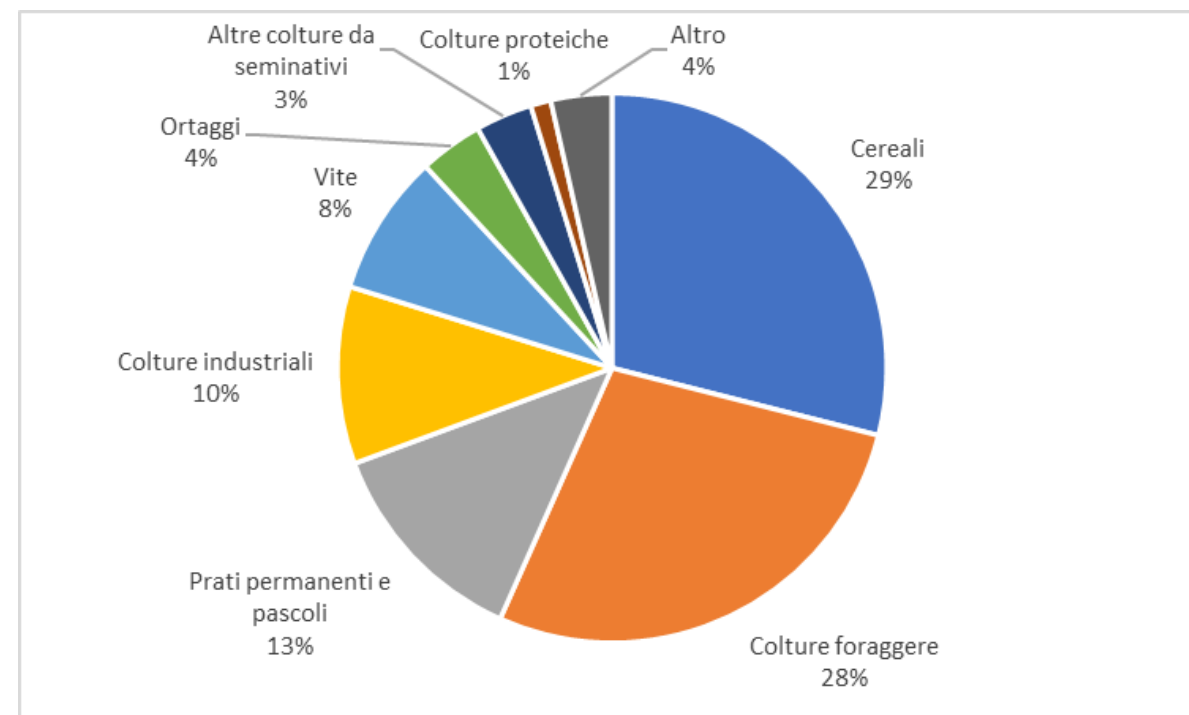


Source: Elaboration SMEA on SINAB data and Agricultural Census

The main organic crops in Lombardy in 2023

- The most important crops in terms of surface area remain, also in 2023, cereals, with approximately 15,600 hectares, equal to 29% of the total. Compared to 2022, however, these areas have decreased by approximately 7,500 hectares, equal to -31.4%.
- Among cereals, the areas of organic rice are in sharp decline, collapsing from 11,492 hectares in 2022 to just 5,254 hectares in 2023, probably due to the drought that characterised these two agricultural years. It should be noted that in 2023, 58% of the Italian organic rice areas are located in Lombardy.
- On the contrary, forage crops have grown from 10,225 hectares in 2022 to 14,910 hectares in 2023, with an increase of approximately 4,700 hectares (+45.8%).
- In the last two years, the areas of permanent meadows and organic pastures have also increased significantly, also as a response to the two particularly dry years of 2022 and 2023.
- In 2023, the organic areas destined for industrial crops also increased (5613 hectares in 2023, +25% compared to 2022) and those destined for vines (4,478 hectares in 2023, +5.7% compared to 2022).

Distribution of the total organic area for the main crops in Lombardy in 2023



(*) Protein crops, legumes, grain crops

(**) Fresh vegetables, melons, strawberries, cultivated mushrooms

Source: Elaboration SMEA on SINAB data

Resources allocated to organic farming in the second pillar of the CAP at regional level

Measure 11 of the RDPs and SRA29 of the rural development compendium of the National Strategic Plan

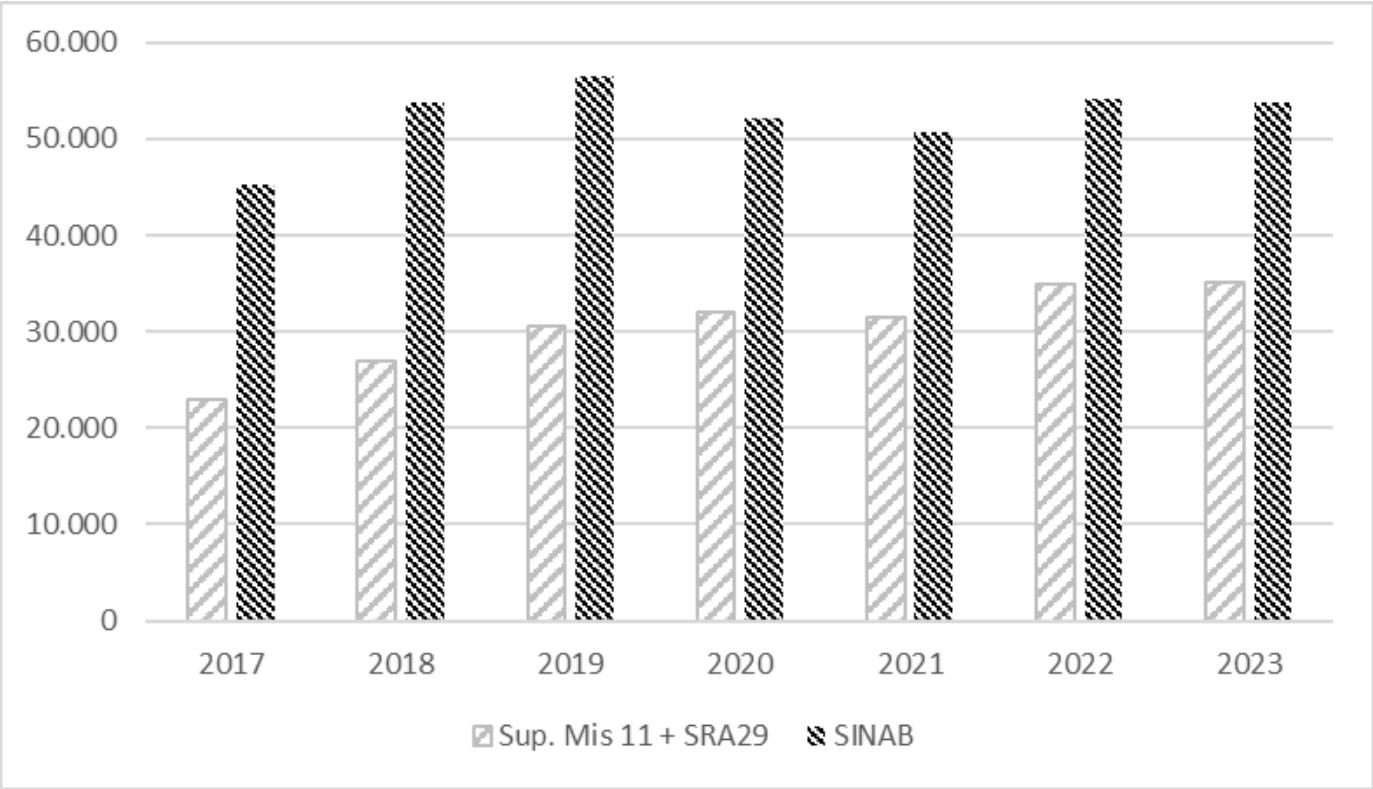
- The sum that the Lombardy region has allocated overall to support organic farming within the second pillar of the CAP stopped, in 2023, at 12.8 million euros, down compared to 14.5 million in 2022 but substantially in line with the value of 2021.
- The hectares affected by the measure, however, including both conversion and maintenance, have been progressively increasing from 14,500 hectares in 2016 to 35,180 in 2023.
- Consequently, the organic area financed overall in the Lombardy region in 2023 represents 65.4% of the total regional organic area detected by SINAB.

Requested surfaces and related amounts for the sub-measures of Measure 11, of the PSR Lombardy (years 2017-2023) and of the two actions of the intervention SRA29 of the Complement to Rural Development of the National Strategic Plan of the CAP 2023-2027.

	<i>ha</i>	<i>000 €</i>
2017	22.900	10.800
2018	27.000	12.155
2019	30.552	13.478
2020	32.028	13.677
2021	31.561	12.868
2022	35.006	14.539
2023	35.179	12.835

Source: Lombardy Region data

Organic area in the Lombardy region from 2017 to 2023: comparison between area paid for measure 11 and SRA29 and total area from SINAB



Source: Elaboration SMEA based on SINAB and Lombardy Region data

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PDO AND PGI FOOD PRODUCTS IN LOMBARDY

PDOs and PGIs in Lombardy and share of the national total

The number of recognised PDOs and PGIs

- At the end of 2023, the number of PDOs and PGIs in Lombardy remained at 75: 34 food products and 41 wines.
- Lombardy products consist of 14 PDO cheeses, 3 PDO cured meats and 7 PGIs, 1 PDO honey, 4 PGI fruit and vegetable products, 2 PGI fish, 1 PGI pasta, 2 PDO olive oils.
- Nationally, in 2023 there were 2 new registrations for food products, reaching a total of 324 units, and one for wines, reaching a numerical consistency of 528. In total, Italy had 852 registered designations at the end of 2023.
- In numerical terms, Lombardy's PDO-PGIs represent 10.5% in the food sector and 7.8% in the wine sector. Overall, the region contributes 8.8% to the total number of PDO-PGIs.

Lombardy's contribution to national PDO/PGI product production

Comparto	Lombardia		Italia		Quota % Lombardia/Italia	
	2022	2023	2022	2023	2022	2023
Numero DOP-IGP alimenti	34	34	322	324	10,6%	10,5%
Numero DOP-IGP vini	41	41	527	528	7,8%	7,8%
Numero DOP-IGP totale	75	75	849	852	8,8%	8,8%

Source: Elaboration SMEA based on Qualivita-Ismea
2024 Report data

Lombardy's PDOs and PGIs

Lombardy's PDO/PGI products

DOP/IGP AREA PRODUZIONE		
Formaggi		
Bitto	DOP	Lombardia
Formaggella del Luinese	DOP	Lombardia
Formai de Mut dell'alta Valle Brembana	DOP	Lombardia
Gorgonzola	DOP	Lombardia, Piemonte
Grana Padano	DOP	Lombardia, Emilia Romagna, Piemonte, Trento, Veneto
Nostrano Valtrompia	DOP	Lombardia
Parmigiano Reggiano	DOP	Lombardia, Emilia Romagna
Provolone Valpadana	DOP	Lombardia, Emilia Romagna, Trento, Veneto
Quartirolo Lombardo	DOP	Lombardia
Salva Cremasco	DOP	Lombardia
Silter	DOP	Lombardia
Strachitunt	DOP	Lombardia
Taleggio	DOP	Lombardia, Piemonte, Veneto
Valtellina Casera	DOP	Lombardia
ORTOFRUTTICOLI		
Asparago di Cantello	IGP	Lombardia
Mela di Valtellina	IGP	Lombardia
Melone Mantovano	IGP	Lombardia, Emilia Romagna
Pera Mantovana	IGP	Lombardia

DOP/IGP AREA PRODUZIONE		
OLIE GRASSI		
Garda DOP – Olio EVO	DOP	Lombardia, Veneto, Prov. Aut. Trento
Laghi Lombardi - Olio EVO	DOP	Lombardia
SALUMI		
Bresaola della Valtellina	IGP	Lombardia
Coppa di Parma	IGP	Emilia Romagna, Lombardia
Cotechino Modena	IGP	Lombardia, Veneto, Emilia Romagna
Mortadella Bologna	IGP	Emilia-Romagna, Piemonte, Lombardia, Veneto, Toscana, Marche, Lazio e la provincia autonoma di Trento
Salame Brianza	DOP	Lombardia
Salame Cremona	IGP	Lombardia, Emilia Romagna, Piemonte, Veneto
Salame d'oca di Mortara	IGP	Lombardia
Salame di Varzi	DOP	Lombardia
Salamini italiani alla Cacciatora	DOP	Lombardia, Friuli Venezia Giulia, Veneto, Piemonte, Emilia-Romagna, Umbria, Toscana, Marche, Abruzzo, Lazio, Molise
Zampone Modena	IGP	Lombardia, Emilia Romagna, Veneto
PESCI		
Salmerino del Trentino	IGP	Lombardia, Trento
Trote del Trentino	IGP	Lombardia, Trento
MIELE		
Miele Varesino	DOP	Lombardia
PASTA		
Pizzoccheri della Valtellina	IGP	Lombardia

Source: Elaboration SMEA based on Lombardy Region and Control Bodies data

The Value of the turnover of DOP and IGP in Lombardy and in Italy

- More than the numerical data, however, the economic weight of regional geographical indication productions is what matters. From the reprocessing of data from QUALIVITA, one can also derive data on turnover value.
- The increase recorded by the regional DOP-IGP system was better than the average for the rest of the country: the data related to food products, in fact, at the national level grew by 3.5% while in the region it increased by 4.2%; for wines, the national variation is -2.3% while at the regional level the value remained stable
- The turnover value of regional DOP-IGP has thus reached 2,085 million euros considering only food products, and 2,561 million if wines are also included.

The contribution of Lombardy to national production of DOP/IGP products

Comparto (DOP/IGP)	Lombardia			Italia		
	2022	2023	Var. % 2023/22	2022	2023	Var. % 2023/22
Formaggi	1.641	1.771	7,9%	5.247	5.527	5,3%
Prodotti a base di carne	338	296	-12,4%	2.261	2.276	0,7%
Ortofrutticoli e cereali	14	15	7,1%	387	379	-2,1%
Aceti balsamici	-	-	-	387	358	-7,5%
Paste alimentari *	n.d.	n.d.	-	268	274	2,2%
Panetteria e pasticceria	-	-	-	105	115	9,5%
Carni fresche	-	-	-	103	114	10,7%
Olio di oliva	0,8	0,9	12,5%	87	115	32,2%
Altre categorie *	n.d.	n.d.	-	15	15	0,0%
Vino	496	496	0,0%	11.292	11.030	-2,3%
TOTALE alimentari	2.001	2.085	4,2%	8.860	9.172	3,5%
TOTALE alimentari e vino	2.497	2.581	3,4%	20.152	20.202	0,2%

(*) (*) The data relating to Pizzoccheri from Valtellina, Varesino Honey, Trentino Trout, and Trentino Char is not available.

Source: Elaboration SMEA on Rapporto Qualivita-Ismea 2024 data

The weight of the Lombardy region in the national DOP-IGP market

Percentage of the regional DOP-IGP turnover compared to the national data

- The share of DOP-IGP food productions obtained in Lombardy compared to the national data has increased in 2023 compared to the previous year, rising from 22.6% to 22.7%. More than one-fifth of the national geographical indication productions therefore come from Lombardy.
- DOP cheeses are by far the most important products at the regional level among geographical indication products: they account for 32% of the national turnover of cheeses, and more than two-thirds (68.6% to be precise) of the total regional turnover of DOP and IGP.
- Meat-based products, including the IGP Bresaola from Valtellina, are the second most important category of products: in 2023, regional productions reached a share of 13% of the national total for cured meats, and 11.5% of the total regional DOP-IGP.
- Geographically indicated wines produced in the region account for 4.5% of the total national turnover for this sector, at the regional level, they contribute to the total revenue of food and wine by 19.2% (still in 2023).

The contribution of Lombardy to national production of DOP/IGP products

Comparto (DOP/IGP)	Quota % Lombardia/Italia		Quota % comparto su tot Regione	
	2022	2023	2022	2023
Formaggi	31,3%	32,0%	65,7%	68,6%
Prodotti a base di carne	14,9%	13,0%	13,5%	11,5%
Ortofrutticoli e cereali	3,6%	4,0%	0,6%	0,6%
Aceti balsamici	-	-	-	-
Paste alimentari *	-	-	-	-
Panetteria e pasticceria	-	-	-	-
Carni fresche	-	-	-	-
Olio di oliva	0,9%	0,8%	0,0%	0,0%
Altre categorie *	-	-	-	-
Vino	4,4%	4,5%	19,9%	19,2%
TOTALE alimentari	22,6%	22,7%	80,1%	80,8%
TOTALE alimentari e vino	12,4%	12,8%	100,0%	100,0%

(*) The data relating to Pizzoccheri from Valtellina, Varesino Honey, Trentino Trout, and Trentino Char is not available.

Source: Elaboration SMEA on Rapporto Qualivita-Ismea 2024 data

Milk intended for producing PDO cheeses in Lombardy

- DOP cheeses continue to be the main tool for enhancing the milk produced in Lombardy farms: in 2023, 43.85% of the milk produced in the region was destined for DOP cheeses.
- Grana Padano is by far the most important product, accounting for 81.4% of the milk destined for DOP in the region. Moreover, the quantities of milk allocated to this cheese are increasing (+4.3% in 2023 compared to 2022).
- Parmigiano-Reggiano produced in Oltrepo Mantovano is the second most important product, absorbing 8.9% of the milk destined for DOP in the region. Altogether, the two grana cheeses account for over 90% of the milk production destined for DOP.
- Gorgonzola is the third product in terms of milk used, and in this case, the variation in 2023 compared to the previous year is also positive (+0.5%).
- On the other hand, in 2023, the quantities of milk destined for Valtellina Casera (-21.6%), Bitto (-21.1%), and Provolone Valpadana (-7.3%) are decreasing.

Latte Processed milk with DOP and the share of certified cheese by product type in Lombardy from 2021 to 2023 (tons)

Formaggio	2021	2022	2023	var. % 23/22
Bitto DOP	2.371	2.356	1.858	-21,1
Formaggella del Luinese DOP	110	70	58	-17,1
Formai de Mut dell'Alta Valle Brembana DOP	1.324	1.253	1.544	23,2
Gorgonzola DOP	120.075	111.982	112.560	0,5
Grana Padano DOP	2.054.100	2.054.350	2.142.878	4,3
Nostrano Valtrompia DOP	83	68	63	-7,4
Parmigiano Reggiano DOP ¹	218.600	224.183	234.700	4,7
Provolone Valpadana DOP	46.136	46.161	42.799	-7,3
Quartirolo Lombardo DOP	17.630	17.089	16.839	-1,5
Salva Cremasco DOP	2.070	1.616	1.679	3,9
Silter DOP	1.119	948	656	-30,8
Strachitunt DOP	269	250	205	-18,0
Taleggio DOP	63.221	61.480	63.467	3,2
Valtellina Casera DOP	14.945	16.589	12.999	-21,6
A- Totale latte lavorato a DOP in Lombardia*	2.541.943	2.538.325	2.632.247	3,7
B- Consegne registrate in Lombardia	5.885.614	5.959.551	6.003.204	0,7
C- Latte lavorato a DOP/ Consegna + vendite dirette in Lombardia (A/B)	43,19%	42,59%	43,85%	

(1) For Parmigiano Reggiano DOP, the processed milk corresponds to the milk produced.

(*) The calculation excludes Formaggella del Luinese DOP since it is made with goat's milk.

Source: *Elaboration SMEA on Organismi di Certificazione e Agea data*

Meat intended for DOP and IGP cured meats produced in Lombardy

- In 2023, a significant slowdown was observed in the supply chain of meats intended for the production of DOP and IGP salami in the Lombardy region.
- The amount of meat destined for the two DOP salamis, Brianza and Varzi, increased by 22.1% in 2023, an important figure even though it refers to relatively limited quantities (913 tons).
- The amount of pork processed in the region for salamis producible both in Lombardy and other territories decreased by 12.6% compared to 2022, falling to 8,377 tons
- Also in 2023, the amount of beef destined for the production of Bresaola della Valtellina IGP decreased (-2.5%), falling below 34,000 tons.
- There was a significant decrease (-14.8%) in the quantities of meat destined for Italian salamini alla cacciatore (DOP) in 2023.
- Conversely, the quantities of Coppa di Parma increased (+30.8%) and those of Salame di Cremona rose (+19.6%).

Raw material intended to be transformed into DOP/IGP cured meat and the incidence of certified quantities on the finished product controlled in Lombardy

	2021	2022	2023	Var % 23/22
A. DOP/IGP producibili solo in Lombardia				
<i>A.1 Salumi di carni suine</i>				
Salame Brianza DOP	258	236	277	17,7
Salame di Varzi DOP *	534	512	636	24,2
Totale	792	748	913	22,1
<i>A.2 Salumi di carni bovine</i>				
Bresaola della Valtellina IGP	38.208	34.765	33.894	-2,5
<i>A.3 Salumi di carne d'oca</i>				
Salame d'oca di Mortara IGP	n.d.	n.d.	n.d.	-
B. DOP/IGP di carne suina producibili anche in Lombardia				
<i>Produzione realizzata solo in Lombardia</i>				
Coppa di Parma IGP	392,4	199,2	260,5	30,8
Cotechino Modena IGP	312,1	115,0	125,3	9,0
Mortadella Bologna IGP	5.969,3	6.119,5	5.265,7	-14,0
Salame Cremona IGP	179,9	183,9	220,0	19,6
Salamini Italiani alla Cacciatora DOP	3.053,9	2.942,2	2.505,4	-14,8
Zampone Modena IGP	28,4	24,3	n.d. ⁽³⁾	-
Totale	9.936,0	9.584,1	8.376,9	-12,6

(*) Estimated data from 2019-2022, data for 2023 provided by the Consortium

(1) The raw material refers to the total production of the individual protection consortia.

(2) Calculations are gross of the weight loss that occurs during the processing and aging phase

Source: Elaboration on Organismi di Certificazione data.



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