



Unione Nazionale
tra le Associazioni dei
produttori di Patate

UNAPA

Società Consortile
a responsabilità limitata

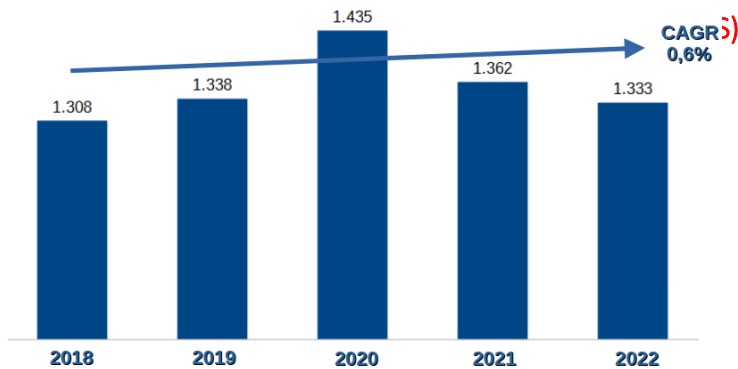
PRESENTATION OF THE APO's UNAPA

Bruxelles, 07-06-2024



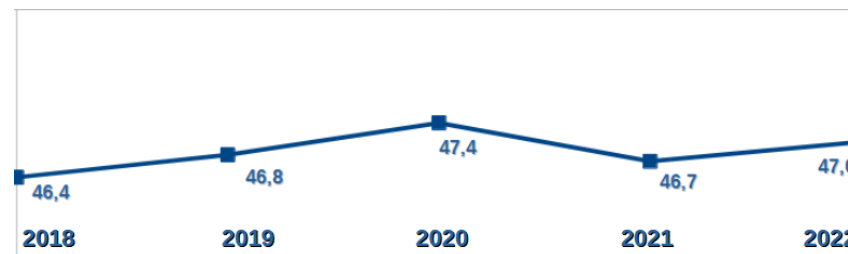
POTATO SECTOR IN ITALY

- The average **national production** is around **1.7 million tons**, of which 1.35 is attributable to professional producers and the remaining 350,000 tons to non-professional growers;
- Around 200,000T early potatoes are destined for export;
- Although Italy is only the **ninth** potato **producing country** at a European level, accounting for just **4% of overall European production**, it still ranks **seventh among the exporting countries** in the EU;
- The annual consumption of potatoes in Italy stands at about 2.2 million tons of potatoes;
- To meet national needs, Italy must import around 1 million tonnes of potatoes annually.



Surface trend 2018-2022 (000 ha)

(fonte Ismea)



Swot Analysis

Forces:

- Product available all year round;
- Low demand – affordable price for everyone;
- Spread of potato cultivation throughout the national territory;
- Wide margin of differentiation of products with specific qualitative characteristics;
- Wide range of varieties with segmentation of uses;
- Presence of regional quality marks;
- Supply chain aligned with Farm to Fork requests;
- Strong integration with processing industry
- Constant monitoring of costs, prices and consumption.

Weakness:

- An uneven development of the market offer according to the different production areas;
- High production and seed tuber costs;
- Fragmentation of land ownership and agricultural supply;
- Limited market transparency;
- Limited storage capacity, especially for processing potatoes;
- Presence of non-professional producers

Swot Analysis

Opportunities:

- Internal demand with a strong territorial characterization;
- High business productivity;
- Market orientation towards quality product systems;
- Possibility of valorisation on an industrial/commercial scale by creating added value to local agricultural production
- Research and technological innovation: for example new more resistant varieties, for instance new techniques and technologies for conservation ;
- Evolution of consumption;
- Development and / or enhancement of new organizational forms ;
- Procedures and guarantee systems on food safety, traceability and quality characteristics of products with supply chain certification;
- Tendency to develop demand for quality mark (e.g. PDO and PGI) and eco sustainable product.

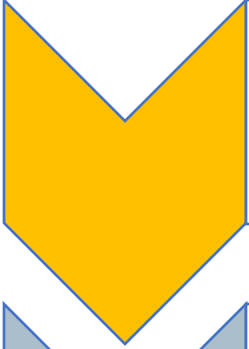
Threats:

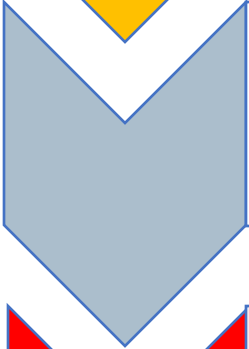
- Increasing competition from Third Countries;
- Growth in operating costs for the entire supply chain, in particular for farmers;
- Fragmentation of land ownership and agricultural supply;
- Limited market transparency;
- Limited storage capacity, especially for processing potatoes;
- Presence of non-professional producers


Sectorial Intervention in the Potato sector

- Potato cultivation in Italy is developed in all pedoclimatic environments even where there are no valid alternatives;
- The sowing and harvesting calendar lasts 9 months;
- According to the latest census of the Italian Ministry of Agriculture, approximately 24,000 farms currently operate in Italy with an average size of 1.29 hectares;
- The potato is a highly specialized crop that allows to the creation of jobs, even in the most economically disadvantaged areas;
- The absence of a Common Market Organization has made the sector highly subject to the trends of the free market and its crises;
- Potato growers have always had to deal with a highly evolved and competitive market;
- To maintain competitiveness and income capacity, Italian potato growers have always promoted forms of economic aggregation (Agro – cooperatives or Producers' Organizations);
- To date, the overall turnover of the potato sector - adding early, fresh and processing market segments - amounts to 1.2 billion euros in Italy;
- Despite the absence of specific economic support measures, a strong presence of Producer Organizations has consolidated in Italy, allowing the commercial offer to be concentrated and strengthening their presence on the market;
- Considering that they are POs that are recognized and operate exclusively in the potato sector, historically the creation of POs that have a regional dimension has been favored to allow a real concentration of the commercial offer;
- Currently, 20 POs and 1 APOs are legally recognized in Italy.

Sectorial Intervention in the Potato sector

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- The art. 43 (4) of EU Regulation 2021/2015 allows Member States to implement sectoral aid for “other sectors” in their National Strategic Plans;
 - The art. 42 of EU Reg. 2115 includes fresh and chilled potatoes as potential beneficiaries;

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- The Member State can transfer up to 3% of the resources allocated to the first pillar (direct aid) to the sectoral measure;
 - The beneficiaries are POs and AOPs legally recognized on the basis of EU Reg. 1308;

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- The Union financial assistance shall be limited to 50 % of the actual expenditure incurred for the types of intervention referred to in Article 67;
 - This limit shall be increased **to 60% for PO's and APOs for the first 5 years after the year of recognition;**
 - The Union financial assistance **shall be limited to 6 % of the value of marketed production.**

Sectorial intervention in the Potato sector in Italy

Italy has allocated a fund of € 30.000.000 for the period 2023 - 2027 to finance sectoral intervention for the potato sector;

The amount of the aid cannot exceed € 6.000.000 per year;

Applications for intervention are multi-year, from a minimum of 3 years to a maximum of 5 years;

The overall value of marketed production of the POs that have submitted a request for help amounts to approximately € 82.500.000;

The Union financial assistance amounts to €4,800,000 for the first year;

Among the approved Operational Plans, 6 were presented by recently established POs;

POs represent a share of 35% of the Italian market, of which 30% refers to the UNAPA system.

Objectives

a) Planning and organisation of production, adjusting production to demand, in particular with regard to quality and quantity, optimisation of production costs and returns on investments, and stabilising producer prices;

b) Concentration of supply and placing on the market of the products, including through direct marketing;

c) Improvement of medium- and long-term competitiveness, in particular through modernization;

d) research into, and development of, sustainable production methods, including pest resilience, animal disease resistance and climate change mitigation and adaptation, innovative practices and production techniques boosting economic competitiveness and bolstering market developments;

e) promoting, developing and implementing;

f) contributing to climate change mitigation and adaptation;

g) boosting products' commercial value and quality, including improving product quality and developing products with a protected designation of origin or with a protected geographical indication or covered by Union or national quality schemes recognised by Member States;

h) promotion and marketing of the products;

j) crisis prevention and risk management, aimed at avoiding and dealing with disturbances in the markets of the relevant sector;

k) improving the conditions of employment and enforcing employer obligations as well as occupational health and safety requirements

Types of intervention

A) investments in tangible and intangible assets, research and experimental and innovative production methods and other actions;

B) advisory services and technical assistance, in particular concerning sustainable pest and disease control techniques, sustainable use of plant protection and animal health products, climate change adaptation and mitigation, the conditions of employment, employer obligations and occupational health and safety;

C) training, including coaching and exchange of best practices, in particular concerning sustainable pest and disease control techniques, sustainable use of plant protection and animal health products, climate change adaptation and mitigation, as well as the use of organised trading platforms and commodity exchanges on the spot and futures market;

D) organic or integrated production;

E) actions to increase the sustainability and efficiency of transport and of storage of products;

F) promotion, communication and marketing including actions and activities aimed in particular at raising consumer awareness about the Union quality schemes and the importance of healthy diets, and at diversification and consolidation of markets;

G) implementation of Union and national quality schemes;

H) implementation of traceability and certification systems, in particular the monitoring of the quality of products sold to final consumers;

I) actions to mitigate, and to adapt to, climate change.

APO's UNAPA

AS.PRO.PAT.Piemonte Società Cooperativa Agricola

ALPROPAT Società Cooperativa Agricola

COPAG Cooperativa Produttori agricoli Giudicariesi So. Coop. Agr.

COPROPA Cooperativa di produttori di patate del Friuli Venezia Giulia
Soc.coop.

AGRIPAT Società Agricola Cooperativa

PATFRUT Società Cooperativa Agricola

CCORAV Consorzio Cooperativo ortofrutticolo Alto Viterbese Società
Cooperativa Agricola

AMPP Associazione Marsicana produttori patate Società Cooperativa
Agricola"

ASSO.NA.PA. Società Cooperativa

CAMPANIA PATATE S.C.aR.L.

PPAS Consorzio Produttori Patate Altopiano Silano Società Cooperativa
Agricola

Objectives to strengthen the potato sector at EU level

