



What has happened after the Regulation on organic wine

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A Little bit of History

L'**AIAB** existed informally already in 1982, but it was legally formed in 1988.

Has around 9.000 members (producers, processors, advisors, researchers e citizens).

Until 2000 it has been the major Italian Certification Body operating in Organic Agriculture. In 2000 it has separated the certification from the Association Activities and contributed to the creation of ICEA (Istituto di certificazione etica ed ambientale).



The Structure

AIAB is a Federal Association with headquarters in Rome and 18 regional associations that are independent legal and economical entities.

AIAB Liguria is based in Genova (Region of Liguria). It has been established in 1998. It has two operational offices in Varese Ligure (in the Biodistrict of Val di Vara – Valle del Biologico), and one in Imperia.



Area of work

- Advocacy: regional, local level
- Education for farmers
- Information campaigns: Biodomenica and Primavera Bio
- Campaign (GMOs, spreading OF)
- Technical assistance for farmers
- On farm research
- Social Farming
- Communication
- International work



ORGANIC WINES – Structural data

Exponential Growth of organic viticulture in the world in the last 10 years

Spain is the main European Country in terms of organic vineyards (more than 32% of the organic hectares in Europe).

While from 2000 till now the vineyards in Italy has decreased, the organic one is more than doubled (68.000 Ha – 2013).

In Italy the quota of organic viticulture is at 10,5% compare to whole sector. Sicily has a quota of nearly 25% - 1 Hectare out of four is certified organic.

+ ORGANIC MARKET SHARE IN ITALY

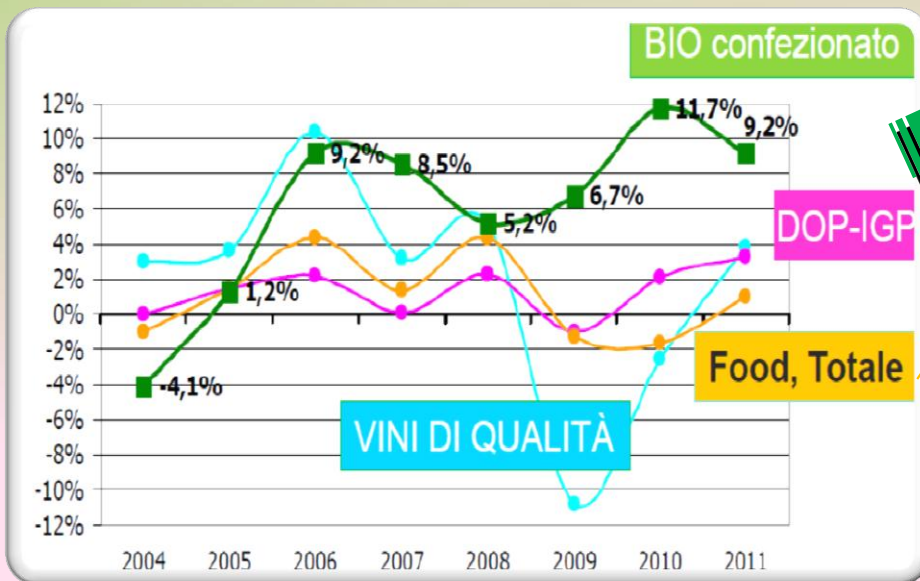


SIGNIFICANT INCREASE IF WE CONSIDER THE LONG ECONOMIC CRISIS.

The Segment of consumers with high interest in organic wines is increasing.

And GDO is not the main seller of organic wines.

In 2015, the 16,8% of italians bought at least once a bottle of organic wine, in 2013 only the 12% of the population.



COMPRANO PRODOTTI BIO
+23% di famiglie

COMPRANO VINO BIOLOGICO
+5,9%

FAMIGLIE ACQUIRENTI DI PRODOTTI BIO,
2 famiglie italiane su 3

ACQUIRENTI DI VINO BIO,
16,8% degli italiani

+16%
BIO

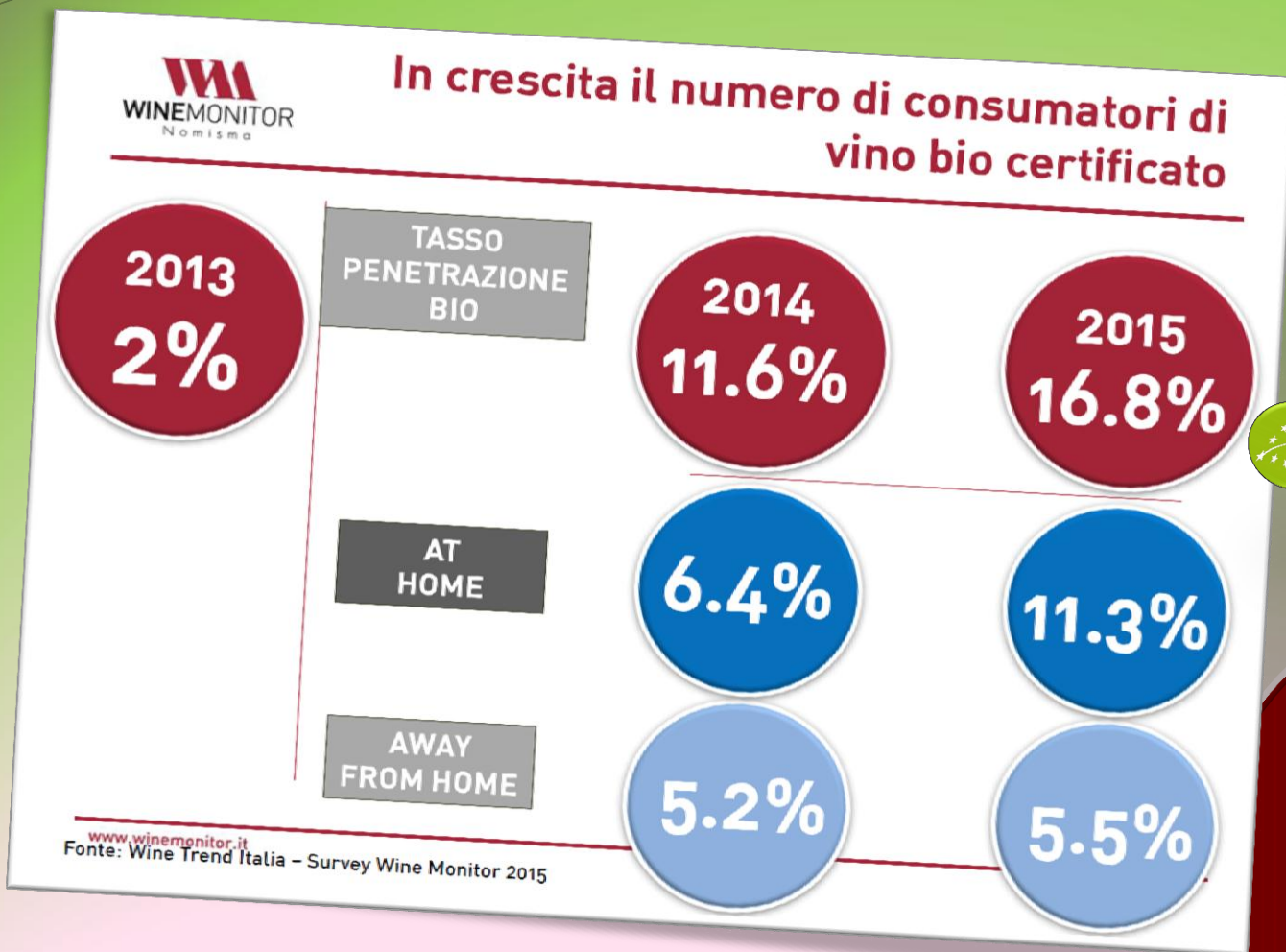
Primi 4 mesi del 2015

-0,9%

Totale agroalimentare

Trend nelle vendite di diversi prodotti (variazione % sull'anno precedente)

What has happened since 2012?



16,8%
degli italiani
(18-65 anni)
hanno consumato
vino bio
nel 2015

Reg. 203/2012 has brought the fundamental denomination of organic wine, defining procedures and additives admitted in enology :



- in vigneto: si producono uve biologiche, coltivate senza l'aiuto di sostanze chimiche di sintesi (concimi, diserbanti, anticrittogamici, insetticidi, pesticidi in genere) e senza l'impiego di organismi geneticamente modificati;

- in cantina: si esegue la vinificazione utilizzando solo i prodotti enologici e i processi autorizzati dal regolamento 203/2012 (elenco nell'allegato VIII bis).



The thresholds of total sulphites
vini bio rossi secchi < 100mg/l
bianchi secchi < 150mg/l



ORGANIC CERTIFIED WINES

**FRUTTO DI UN'ATTENZIONE PER L'AMBIENTE CHE RACCONTANO STORIE DI UN
INDISSOLUBILE LEGAME CON IL TERRITORIO,
VINI CHE PIACCIONO SEMPRE PIÙ,
SOPRATTUTTO SUI MERCATI INTERNAZIONALI,
TALVOLTA CON CANTINE PIÙ CONOSCIUTE ALL'ESTERO CHE NEL PROPRIO PAESE.**

VINI BIO



STRENGTHS

point of view of the supply

In the world (2014)
About 312.000 hectares
Less than 5% of total vineyards is organic (+11% in 2013).

84% organic vineyards are in Europe.

78% in EU

In Italy
11% of the vineyards are organic

point of view of the demand

ORGANIC CERTIFICATION OF WINES SURELY GAVE APPEAL TO THE SECTOR AND TRANSPARENCY IN THE COMMUNICATION

Exploit in the market

But still a lot can be done:

Consumers look for these products because they perceive a higher quality compare to conventional wines.

16,8% of Italians drunk organic wines

WEAKNESSES

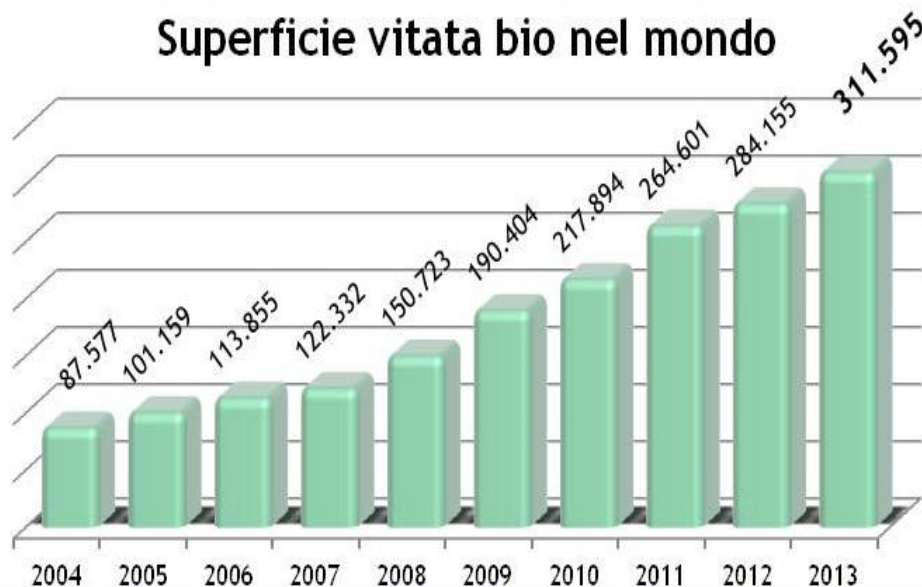
Most of italian winemakers would like to see Reg. 203/12, revisited in order to reduce the list od additives, in order to make more clear and sharp the difference with conventional wines.

Sulphites thresholds

Too long list of additives

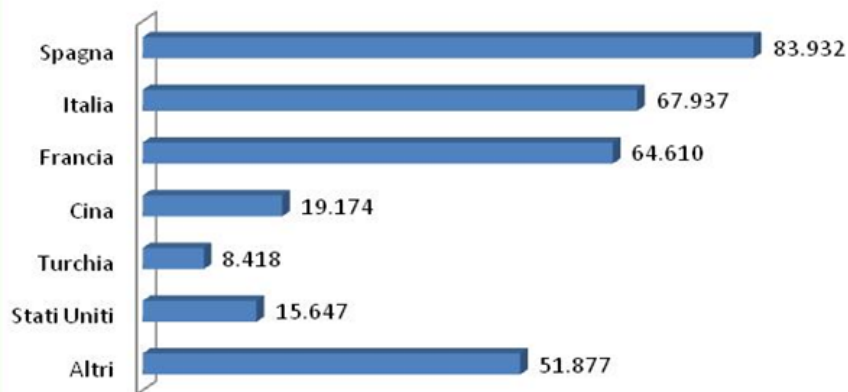
ON ORGANIC VINEYARDS...

Superficie vitata bio nel mondo



**Oltre il 22% della
superficie vitata
mondiale
è in Italia**

Ettari a vite bio nei principali Paesi



Fonte: elaborazione Firab su dati FiBL-Ifoam, 2015

**Vite bio in Italia
nel 2014**

72,3 mila ha

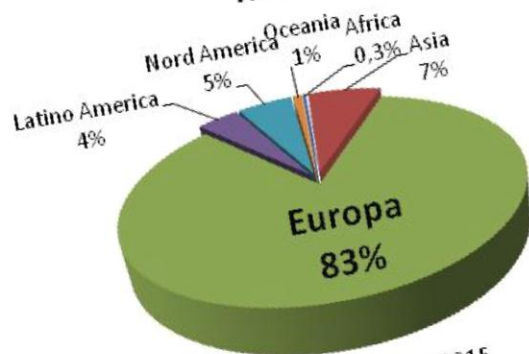
+6,5%



EUROPE IS THE MAJOR PRODUCER OF ORGANIC WINES

**IN EUROPA 83%
DELLA VITICOLTURA
BIO MONDIALE
(78% IN UE)**

Distribuzione dei vigneti bio nel mondo



Fonte: elaborazione Firab su dati FiBL-Ifoam, 2015

Vite bio europea
+249%
in 10 anni

Perdita di
perimetro
vitato
convenzionale
dell'UE

Italia bio

al 2° posto,

dopo Spagna. Al 3° Francia

Vite bio
in Italia
72,3
mila ha

11%



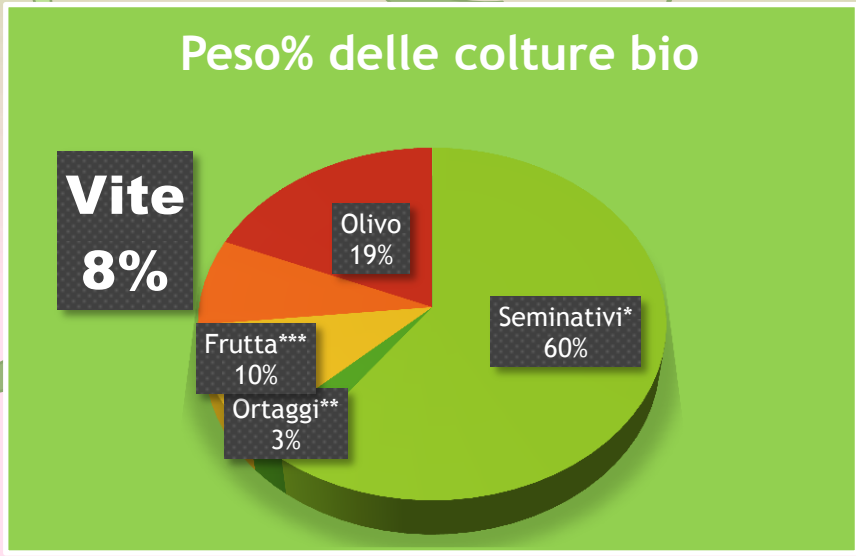
After 3 years from the Regulation 203/2012 these are the numbers of Italian organic viticulture

VITE BIO
MORE THAN **72 MILA HA**
11%
OF TOTAL
VINEYARDS

VITE BIO
+6,5%
in 2014

VITE BIO
+26%
In 3 years

Vite bio
+97%
in 8 anni



Fonte: elaborazioni Firab su dati Sinab

The numbers of the organic wine markey: the demand



Organic wine dribble the crisis : **+5,6%** the growth of the sells in the GDO

First 4 months 2015

(in 2014 +4% in volume, versus the -6,5% of the whole wine sector).

The importance of the international market

What we export?

46,1% red wines

32,7% white wines

21,2% sparkling wines

Excellent performance for the export:
One Bottle of organic wine out of three
Is imported to the US from ITALY

VINO BIO: IMPORTAZIONI DEGLI STATI UNITI PER TIPOLOGIA E PAESE DI ORIGINE
(milioni di €, share % - 2013)

| | Vini rossi BIO | Vini bianchi Bio | Vini frizzanti BIO | Totale vino BIO |
|--|----------------|------------------|--------------------|-----------------|
| USA - Import totale di vino BIO milioni di euro | 89,1 | 63,1 | 40,8 | 193,0 |
| di cui da: | | | | |
| Francia | 35,9% | 17,5% | 54,0% | 33,7% |
| Italia | 26,2% | 30,6% | 34,2% | 29,3% |
| Nuova Zelanda | 1,0% | 21,7% | 0,1% | 7,6% |
| Spagna | 10,0% | 2,8% | 9,1% | 7,5% |
| Altri paesi | 26,9% | 27,4% | 2,7% | 21,9% |

Fonte: Ismea Nielsen, Wine Monitor Nomisma, Iri



BIODISTRICTS

What is a Bio-District?

A bio-district is a geographical area where farmers, citizens, tourist operators, associations and public authorities enter into an agreement for the sustainable management of local resources, based on organic production and consumption (short food chain, purchasing groups, organic canteens in public settings and schools).

ABOUT WINE: BIODISTRICT OF CHIANTI CLASSICO

AND FRANCIACORTA ON THE WAY...



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