

# Guidelines for organic processing boost or obstacle for innovation?

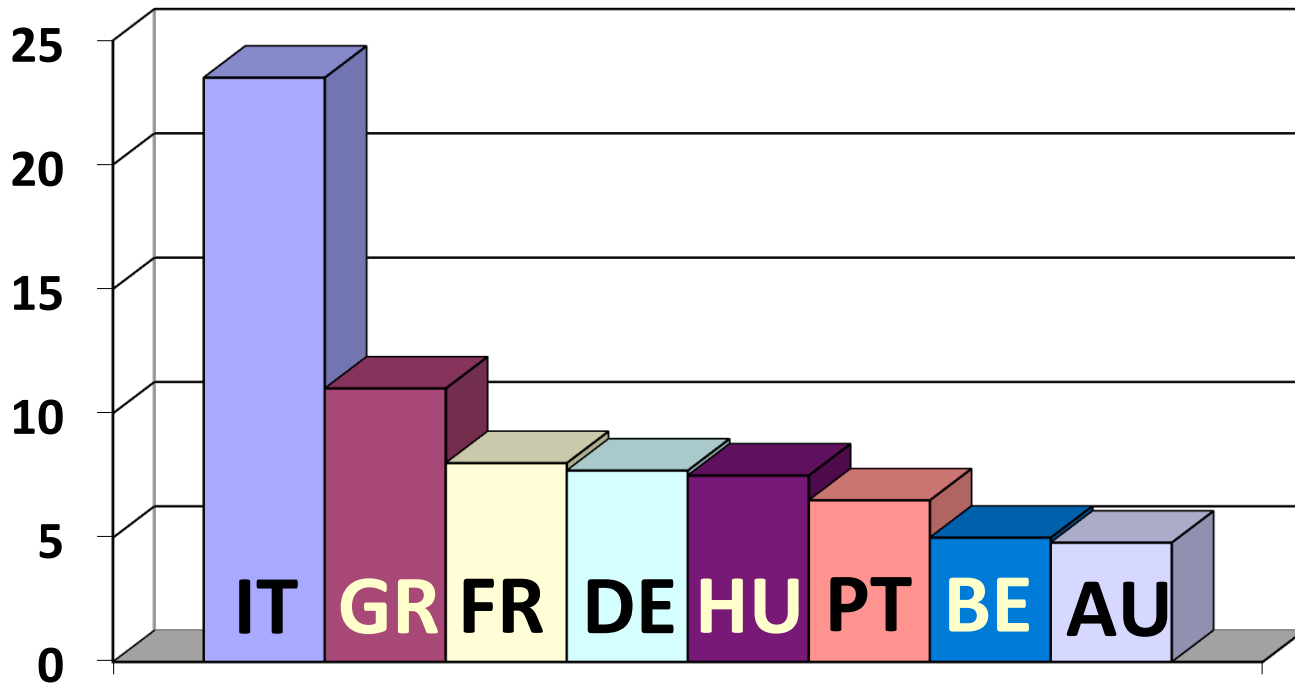
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# From the market point of view...



## Consumption of Pasta in the EU Countries, 2018 (kg/year/per capita)



to each  
his own

Source: Ipo - International Pasta Organisation, 2018

## Consumption of frozen foods in tons (2017)

	GERMANY	ITALY
VEGETABLES	503 604	402 450
FISH	300 627	113 400
POTATOES	430 381	145 350
MEAT	431 059	26 350
READY MEALS	457 664	45 500
PIZZA/SNACK	580 207	91 500
BREAKFAST/DESSERT	912 355	7 450
OTHERS	15 927	9 500
<b>TOTAL</b>	<b>3 694 825</b>	<b>841 500</b>

## Frozen foods in kg per capita/year (2017)

	GERMANY	ITALY
VEGETABLES	6.1	6.6
FISH	3.6	1.9
POTATOES	5.2	2.4
MEAT	5.2	0.4
READY MEALS	5.5	0.8
PIZZE/SNACK	7.0	1.5
BREAKFAST/DESSERT	11.0	0.1
OTHERS	0.2	0.2
<b>TOTAL</b>	<b>44.6</b>	<b>13.9</b>

*Source: Istituto italiano alimenti surgelati*



Category	Total market	Organic
Fruit	9.0%	23.2%
Vegetables	10.9%	19.2%
Cereal products	14.3%	17.1%
Dairy	13.8%	12.9%
Eggs	1.1%	5.7%
Wine	3.2%	1.5%
Meat	10.2%	0.9%
Fish	8,1%	0.6%
Salami	6.2%	0.4%
Honey	0.2%	0.9%

Source: Ismea on Nielsen data

# What is in the shopping cart?

Share of categories in Italy, in value, 2018



## Reasons to buy organic food in Germany

- **Animal Welfare (90%)**
- **Regional origin / support of regional companies (90%)**
- **Less additives and processing aids (87%)**
- **Lowest possible pollution (87%)**
- **Healthy diet to strengthen well-being (84%)**
- **Contribution to the support of organic farming (82%)**
- **Contribute to effective environmental protection (81%)**
- **GMO-free foods (78%)**
- **Contribution to the conservation / promotion of biodiversity (73%)**
- **Availability of food in the usual shops (71%)**
- **Taste (68%)**
- **Often fairly traded (59%)**
- **Diet for children or during pregnancy (56%)**
- **Food scandals (52%)**
- **Advise by qualified personnel (35%)**

*Source: Ökobarometer 2017*

**What are  
consumers'  
interests?**



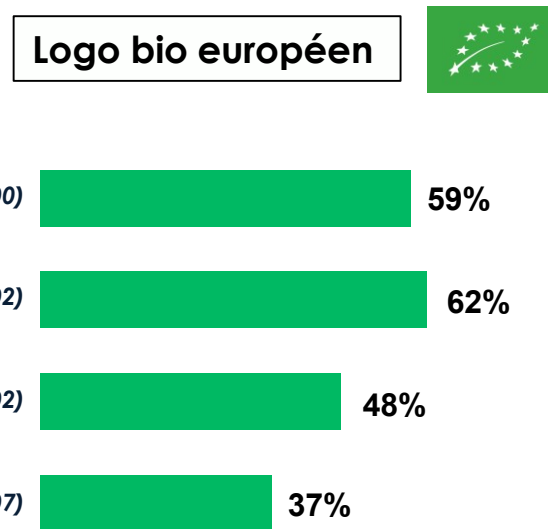
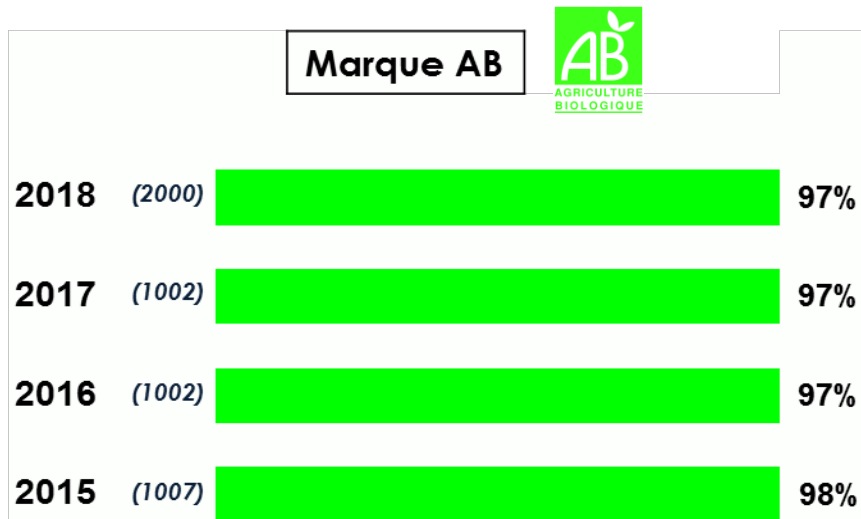
May be too many standards for a market that is worth 92 074 Million EUR\* at global level (and with a per capita consumption of just 12.2 EUR\*)?

\* Source: FiBL-AMI survey 2019



# TRANSPARENCY?

## Knowledge of the logo(s)

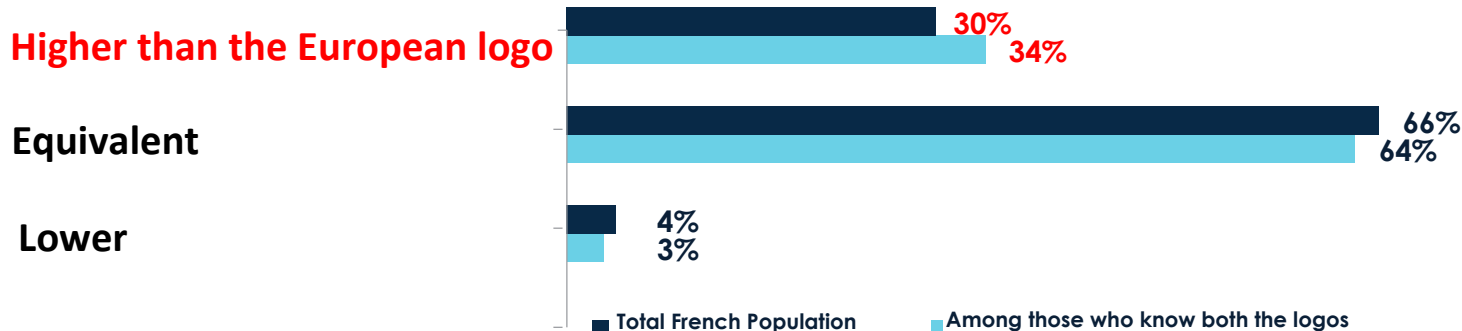


Source: AGENCE BIO - baromètre de consommation et de perception des produits biologiques en France - Edition 2018



# Comparative perception of the national and European logo in France

Do you think the AB logo identifies quality of organic products...



	total	men	women	18/24 y	25/34 y	35/49 y	50/64 y	+64 y
Equivalent	66%	61%	71%	61%	65%	66%	69%	66%
Higher	30%	35%	26%	32%	30%	32%	28%	31%
Lower	4%	4%	3%	7%	5%	2%	3%	3%

Source: AGENCE BIO - baromètre de consommation et de perception des produits biologiques en France - Edition 2018

Naturland	Demeter
<ul style="list-style-type: none"> <li>• Highest priority to primary substances certified by Naturland.</li> <li>• If not available: Primary substances from certifiers recognised by Naturland</li> <li>• If not available: <b>Primary substances certified by other control bodies (on approval)</b></li> </ul>	<ul style="list-style-type: none"> <li>• Fundamentally agricultural products originated from biodynamic farms contractualized with the national Demeter organisation</li> <li>• If not available: Products certified by organic control bodies recognised by Demeter</li> <li>• If not available: <b>Products certified to EU regulations 834/2007 + 889/2008</b></li> </ul>

## ADDITIVES, PROCESSING AIDS

UE number	UE 834	DEMETER	UE number	UE 834	DEMETER	UE number	UE 834	DEMETER
E 153	Green		E 331	Green	Green	E 440(i)*	Green	Green
E 160b*	Green		E 333	Green	Green	E 464	Green	Green
E 170	Green	Green	E 334	Green	Green	E 500	Green	Green
E 220	Green	Green	E 335	Green	Green	E 501	Green	Green
E 224	Green	Green	E 336	Green	Green	E 503	Green	
E 223	Green		E 341(i)	Green		E 504	Green	
E 250	Green		E 392*	Green	Green	E 509	Green	Green
E 252	Green		E 400	Green		E 516	Green	Green
E 270	Green	Green	E 401	Green		E 524	Green	Green
E 290	Green	Green	E 402	Green		E 551	Green	
E 296	Green		E 406	Green	Green	E 553b	Green	
E 300	Green	Green	E 407	Green		E553b	Green	
E 301	Green		E 410*	Green	Green	E901	Green	Green
E 306*	Green	Green	E 412*	Green	Green	E903	Green	Green
E 322*	Green	Green	E 414*	Green	Green	E 938	Green	Green
E 325	Green		E 415	Green	Green	E 939	Green	
E 330	Green	Green	E 418	Green	Green	E 941	Green	Green
			E 422	Green	Green	E 948	Green	
						E 968	Green	

That said (and after hitting someone):

**Innovations consumers claim to want are in the sphere of animal welfare, of regional sourcing (rural development, food miles) or fair trade, of a sharp cut of additives and processing aids, of an healthy diet, of environmental and biodiversity protection (energy, waste, over-packaging) and of taste.**

**These seem to be the innovation that companies are called upon to guarantee.**

That said (and after hitting someone):

## **EU GUIDELINES FOR ORGANIC PROCESSING**

**the industry boast natural and “homemade” processing (storytelling: grandma cooking cookies), but has occasional attempts at industrialization in highly sophisticated sectors (e.g. baby food, oil refining, etc.) or for regional differences (e.g. wine).**

**Interpretations on practices change in different countries (example: ion exchange resins), an homogeneous approach is needed.**

**Some additives and processing aids are not of general, but of limited and very specific interest; some absolutely harmless additives and processing aids, long-standing in traditional recipes, are not allowed: the assessments of the Commission (and of national competent authorities) sometimes are bizarre.**

**But after all, the framework is fairly honest.**

That said (and after hitting someone):

## OWN GUIDELINES

Own guidelines to really raise the quality of processes and products are welcomed.

We must avoid passing limited differences compared to the EU standard as an example of purity and adherence to principles, in order not to make fun of consumers and to ensure fair competition.

The most promising standards concern

- **shortening of the list of ingredients** (yes, in contrast with the development of increasingly complex products),
- nutrition (**reduction** of salt, sugar, fat, maintaining palatability)
- decisive actions on **packaging**
- **energy** consumption and **carbon footprint**.

The EU regulation (old and new) does not pose any obstacle.

Remember Greta (and let us not be overtaken by mainstream industry)

That said (and after hitting someone):

## GROUP STANDARDS

Standard by associations to effectively raise the quality of processes and products are welcomed.

We must avoid to be **poor marketers** passing limited differences compared to the EU standard as an example of purity and adherence to principles, in order not to make fun of consumers and to ensure fair competition.

Focus on consumers' interest.

That said (and after hitting someone),

# Thanks for your attention

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