

# AIIPA



Associazione Italiana Industrie Prodotti Alimentari

## INTERPERA 2009

## ITALIAN PEAR PROCESSING INDUSTRY

# PRESENTATION

The Italian Food companies association (AIIPA), founded in 1945, is one of the main industrial organizations of the field. It represents more food sections and it associates currently approximately 300 companies. It joins to numerous organizations of category in international within UE and (OEITFL, OEIT etc.)

The headquarters are in Milan, with offices in Rome.

# AIMS

- Protect the interests and the image of the associated companies
- Representation in the relationships with the institutions and the administrations - or that on a national level communitarian - and with the various economic, political, trade-union, cultural members of the society
- To promote the collaboration and the solidarity between the associated companies
- To supply advising, consultancy, attendance and services on general matters and specific interest

# AIIPA GROUPS:

- 1° Gruppo DERIVATI DEL POMODORO (TOMATOES PRESERVES)
- 2° Gruppo CONFETTURE, MARMELLATE, GELATINE (JAM, MARMELADE AND JELLY)
- 3° Gruppo CONSERVE DI ORTAGGI E DI FRUTTA (FRUIT AND VEGETABLE PRESERVES)
- 4° Gruppo VEGETALI ALL'ACETO, ALL'OLIO, IN SALAMOIA E SPECIALITA' AFFINI ( OIL and VINEGAR VEGETABLE)
- 5° Gruppo SUCCHI E NETTARI DI FRUTTA E ORTAGGI (FRUIT AND VEGETABLE JUICE AND NECTARS)
- 6° Gruppo PRODOTTI DISIDRATATI - FUNGHI ESSICATI (DEHIDRATED PRODUCTS DRIED FUNGI)
- 7° Gruppo BRODI, MINESTRE, ESTRATTI E PRODOTTI AFFINI (SOUPS)
- 8° Gruppo PRODOTTI PER UN'ALIMENTAZIONE PARTICOLARE INTEGRATORI ALIMENTARI ( ALIMENTARY INTEGRATORS)
- 9° Gruppo PRODOTTI SURGELATI (DEEP FROZEN FOODS)
- 10° Gruppo CAFFE' (COFFEE)
- 11° Gruppo INVOLUCRI NATURALI PER SALUMI (NATURAL COVERING FOR SALAMI)
- 12° Gruppo PRODOTTI PER GELATO (ICE CREAM PRODUCTS)
- 13° Gruppo MIELE - ALTRI PRODOTTI DELL' ALVEARE (HONEY AND OTHER PRODUCTS)
- 14° Gruppo PRODOTTI ALIMENTARI VARI (other Food Products)

# ACTIVITY AREAS

- Labor legislation and contracta (Trade-union area)
- Legislation area
  - Study and analysis of the national, communitarian and international legislation alimentary Area giuridico – normativa
  - Proposals and participations to promote norms answering to the expectations of the market and the operating manufacturers
- industrial relation to its management.
  - Problematic various Information and advising on the contractual ones and of the legislation of the job.
  - Legal area - normative -. - Information, advising and attendance in the field of the merceologica and hygienic-sanitary discipline of the alimony, let alone of the legislation acclimatize them. -.

# ACTIVITY AREAS

- *Economic area*

- *Specific Management, for everyone of the represented food groups, of the the problems connected to the industrial activity*
- *Thematic Study of the economic-productive ones of the food industry .*
- *Elaboration of studies, surveyings and statistics the production, the foreign trade and the consumption.*
- *External relations - Participation and collaboration with agencies and organisms private publics and, of interest for the food industry.*
- *Relations and contacts with the economic, political and cultural members of the society.*
- *Valorization of the image of the food companies and food products.*

# Pear production in Italy

- **Total processed pears: 130.000 tons**
- **Of which:**
  - **42.300 tons canne dfruit**
  - **10.000 tons for alchol production**
  - **77.700 tons purée and concentrates**

## **Variety processed:**

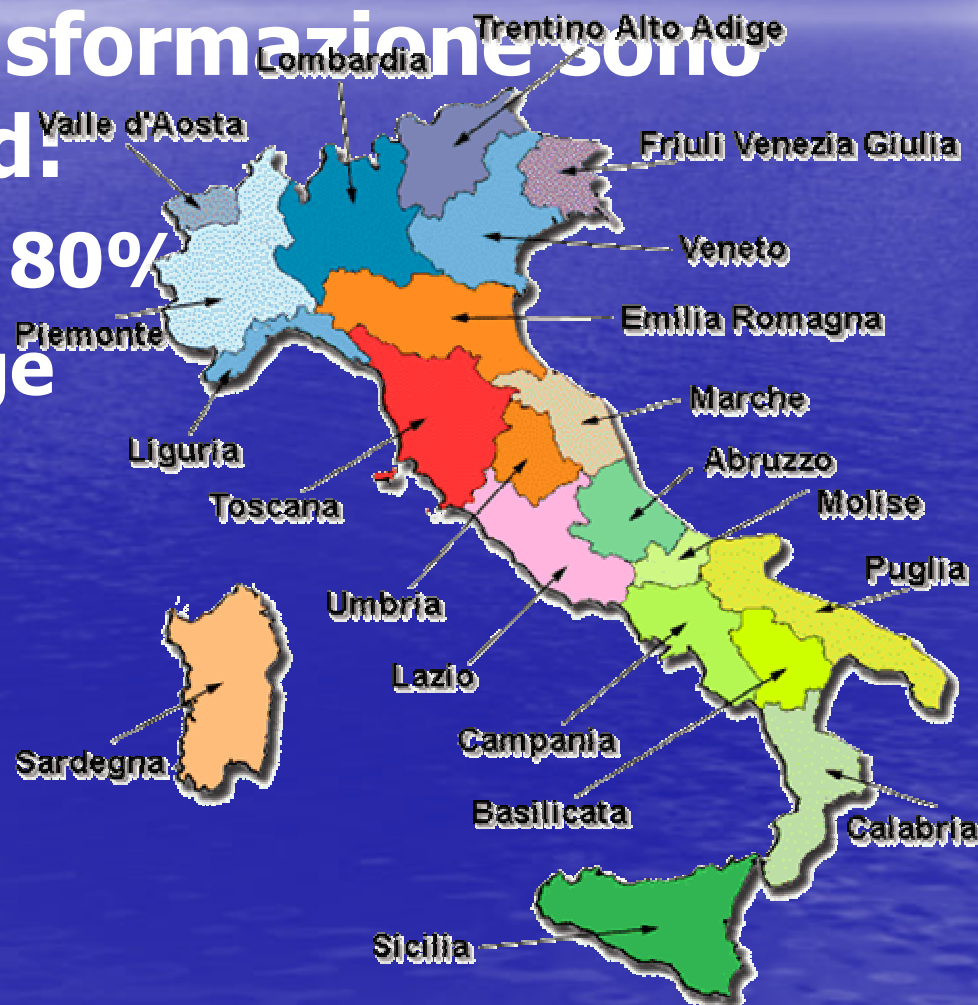
- **85% William's**
- **15% Altre (Abate, Conference, Decana etc)**

**(source: AIIPA survey 2009)**

# Le industrie di trasformazione

- Le industrie di trasformazione sono localizzate al Nord:

- Emilia Romagna: 80%
- Trentino Alto Adige
- Veneto
- Piemonte





# Pear Products

- Canned pears whole, halves or quarters in syrup (14-16 brix)/juice/water
- Canned fruitcocktail (min pear+ peach 60%)
- Diced pears in cans or aseptic or frozen
- Purée (single strain and paste)
- Juice and juice concentrates
- Compote (pieces + purée)
- Jam
- Alcohol production (spirits snaps)

# Quality requirements EU

- Reg Ue 217/2002 Raw material quality requirements
- Reg. UE 1559/2006 laying down minimum quality requirements for Williams and Rocha pears in syrup and/or in natural fruit juice under the production aid scheme
- EU directive 112/2001 on fruit juice
- Eu directive 113/2001 concerning fruit jam jelly and marmelade

# CMO Context

- Eu regulation 2200/96 and 1535/2003 till 2008 (about 15 E/ton fresh pear)
- CMO reform in 2007: Eu Regulation 1182/2007 and Eu Reg.1580/2007
- 3Y 100% Subsidies coupledx hectares contracted with industries trough P.Os (2200 Euro/ha; minimum yeald 25 ton/ha)
- Total decoupling (Williams) starting from 2011)

# Trends and prospective

- In 2008 the first year for CMO reform introduction we have registered:
  - Increase in the price levels (for syrup, purée and juice) from 20 to 30%
  - Decrease of the quantity processed (8-10% less than 2007)
  - Decreasing of the factories processing pears
  - Difficulties in exporting toward GBP and USD areas (different currency levels)
- Next years scenarios:
  - Selection and deacresing of the processing company
  - Increasing of the extra UE competition (Cina, Argentina South Africa)
  - Stable consumption for EU market (with a decreasing in the western and increasing in the eastern)
- Opportunities:
  - Quality standard and safety requirements
  - Traceability (field to fork assurance programs)
  - Segmentation of the market (extra UE import for lower price markets and Italian products for premium price markets)

# AIIPA



# Thank you!

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