

## **OI POMODORO DA INDUSTRIA DEL NORD ITALIA A SUSTAINABLE PRODUCTION MODEL FOR PRESERVED TOMATOES**

OI Pomodoro da Industria del Nord Italia is the inter-branch organization for tomato processing in Northern Italy. It brings together all the producer organizations (POs) and processing companies of four regions: Emilia-Romagna, Lombardy, Piedmont, Veneto and the autonomous province of Bolzano.

**All operators in the supply chain in Northern Italy, both agricultural production and industrial processing, are members of the OI.** In addition, specialized research centers are consultative members. Working since 2007, the OI was officially recognized by the European Union's Directorate-General for Agriculture and Rural Development in 2012 and by the Italian Ministry of Agriculture in 2017.

The OI is super partes and has shared governance. There is an equal number of votes between farmers and processors: this ensures that both sides are heard and that decisions in the supply chain are fair.

**The OI has no commercial purpose, but aims to promote the competitiveness of the supply chain through coordination and cooperation,** with a strong focus on quality, social responsibility and sustainability.

### **OI'S NUMBERS**

Italy is the third largest tomato processing country in the world, after the USA and China, and is the **world's largest exporter of tomato products in terms of economic value**. Northern Italy, with a total of 39.000 hectares cultivated and about 2,8 million tons of tomatoes harvested in 2023, represents 52% of Italian and about 25% of European tomato production and processing.

Specifically, in 2023, 39,6% of tomatoes harvested were destined for primary processing into pulp, 31,6% for concentrates, 27,4% for puree and 1,2% for ready-made sauces.

## SUSTAINABILITY IN THE PRODUCTION PROCESS

Production in Northern Italy is sustainable thanks to a **holistic approach** based on several principles.

- All agricultural production is exclusively **integrated** or **organic**
- Every drop of water counts: thanks to **precision irrigation** and **recycling** in the processing plants
- CO2 emissions are low due to the **short distance** between fields and processing plants
- The supply chain is fair because decisions are made on an **equal basis by farmers and processors**. In addition, harvesting in the field is fully mechanized.

## A GREEN SUPPLY CHAIN

The processing tomato chain in Northern Italy was the first agri-food chain in Europe that, for maximum transparency, calculated the PEF-Product Environmental Footprint calculated over the entire production cycle: from field to table. The study was carried out back in 2015, as part of the European project 'Life Prefer'.

The study analyzed 14 indicators, including CO2 emissions, water and energy consumption, fertilizers and pesticides.

The study found that the production of 400g of puree, used to make the famous Italian pasta for three to four people, consumes on average the equivalent in water of a shower, the energy used is equivalent to that of washing a class A washing machine, and the same amount of CO2 is emitted into the atmosphere as that produced by an average car to travel 1.5 km.

What other tomato chain provides such transparent information?

This low environmental footprint is achieved by using several methods, first and foremost in the cultivation

Agricultural production follows **voluntary integrated production for 90%** of the tomatoes grown in the chain and **organic production** for the remaining 10%. Integrated production is a specific system of cultivation, still little known to consumers, that favors the use of techniques that ensure a lower environmental impact, a reduction in the release of chemicals into the environment, reducing the dependence of the supply chain on fertilizers and agrochemicals. This ensures greater agricultural sustainability and superior product quality, thereby protecting consumer health. Integrated production also requires crop rotation and water conservation.

**Little water** is used. In agricultural production, the use of sensors to detect soil moisture means that it is possible to know exactly when to irrigate, and precision irrigation with drip systems allows water to be sent only where it is

needed, without waste. These decisions have reduced water consumption by 20% compared to traditional irrigation methods. In the production process, water is reused several times to reduce waste.

**Environmental sustainability** is also about the carbon footprint

The distance between the fields and the processing plants is very short, on average only 60 km. Tomatoes are processed very fresh and transport emissions are 80% lower than the market average. Renewable energy is used at the processing stage.

The focus of the supply chain is not only on environmental sustainability, but also embraces **social and economic sustainability**. Field harvesting is fully mechanized. Agricultural and industrial parties take equal decisions and define framework contracts that allow for fair transactions in the chain and fair remuneration. Choices that show how the Northern Italian tomato processing chain is far from the stereotypes of labor exploitation with which Italian tomatoes are often associated.

## **TOMATO SAUCE PROJECT**

### **SUSTAINABLE AGRICULTURE UNDERSTANDING IN CENTRAL EUROPE**

Sustainability is an increasingly important issue for consumers around the world, and it has a growing relevance in the food sector. For this reason, the Northern Italian processing tomato supply chain has launched the Tomato SAUCE project (Sustainable Agriculture Understanding in Central Europe) to promote awareness of the sustainability of European tomatoes and, in particular, **to publicize and enhance the high environmental standard guaranteed by the agricultural and industrial processing process in Northern Italy.**

The target countries of the project are **France and Germany**, among the main countries of destination for Italian red preserves; the project is financed by the European Union and falls within the European program for the promotion of agricultural products AGRIP, specifically Theme 3 AGRIP-SIMPLE-2022-IM-SUSTAINABLE.

The Tomato SAUCE project **aims to increase consumer knowledge and awareness of the high environmental standards applied to production methods in the European Union**, to bridge the gap between attitudes and behavior, and to promote specific knowledge about the sustainability of the various stages of the life cycle of red canned tomatoes produced in the Northern Italian processing tomato chain. To this end, the project will involve buyers, industry operators, journalists and food bloggers in order to show them real sustainability through data and real-life experiences in a transparent way. The project's message is clear: **"Grounded in sustainability. European tomatoes grow with purpose".**

#### **- Tomato SAUCE Project Activities**

The project runs for two years (2023-2025) and involves the implementation of a series of online and offline activities. First of all, the creation of a dedicated **website** (<https://Olpomodoronorditalia.it/en/>), the opening of a **LinkedIn page** (<https://www.linkedin.com/company/OI-pomodoro-nord-italia>)

and a **YouTube channel** (<https://www.youtube.com/@OIPomodoro>), sending out a **newsletter** (<http://eepurl.com/iwwv8Q>), activating online **campaigns**, advertising in trade magazines and participating in the most important food fairs in Europe: Anuga in Cologne in 2023, Cibus 2024 in Parma, Sial 2024 in Paris. Activities also include the organization of a **study trip** to allow trade journalists and food bloggers to visit fields and factories in Northern Italy to learn about the real sustainability of the supply chain, and the production of a five-part documentary series entitled **Truemato**.

**- *Truemato, the docu-series on sustainability***

The quality of processing tomatoes grown in Northern Italy is the result of careful planning and organization of the supply chain that focuses strongly on sustainability. An advantage and a characteristic aspect of the cultivation and processing processes that the interprofessional organization wanted to tell through a five-part documentary series, Truemato, visible on the YouTube channel.

The five short films aim to make people **discover, with a holistic approach, the environmental, economic and social sustainability of the tomato processing chain in Northern Italy**, directly through the voice of the protagonists, filmed in the fields and in the factories.

In the first episode, the protagonists explain how tomato growers and processors in northern Italy are committed to **preserving the environment at all stages of the supply chain** and protecting the "social" aspects of production.

In the second episode, **the farmers explain why they have chosen integrated farming** and how tomatoes grow naturally in the fields, strong and tasty.

The third episode focuses on **CO2 emissions**, how much and how the supply chain has worked to reduce them over the years. This is possible in part

because the average distance between the growing fields and the processing plants is only 60 kilometers, which limits truck emissions to just 7.8 kilograms of CO<sub>2</sub>. In addition, energy from renewable sources is used in processing.

The Northern Italian tomato processing chain, through a study carried out in 2015 as part of the European "Life Prefer" project, calculated the CO<sub>2</sub> emitted to produce 1 kg of puree at 1.27 kg. Compared to an updated measurement in 2021, the baseline has been reduced by 20%, from 1.27 kg to 1.07 kg, demonstrating the commitment of the entire supply chain to adopt choices and solutions that make it increasingly sustainable.

The fourth episode takes a closer look at cultivation and explains the **innovative solutions adopted by the tomato processing chain in northern Italy to save water**. In the field, through precision irrigation, with studies to improve and make more efficient water management in experimental fields where new working methods are tested. In processing, by recycling water for use in the various stages of processing.

The fifth episode is dedicated to **social responsibility**. It discusses the mechanized harvesting of tomatoes, a development that has made it possible to increase productivity, but above all to involve skilled professionals and ensure **fair, safe and healthy working conditions**, with full respect for workers' rights. It also presents the model of shared governance, which promotes cooperation and fairness and the equitable distribution of value along the supply chain, between farmers and processors:



<https://Oipomodoronorditalia.it/en/>

[Linkedin](#) – [YouTube](#)

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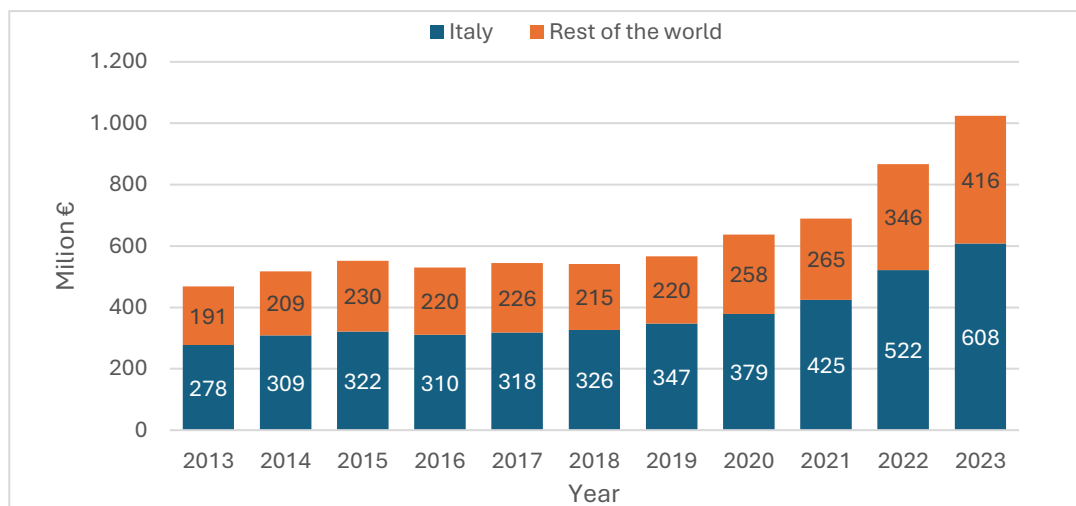
## Italian Tomato Derivatives' Export in Germany and France

### GERMANY

The total value of imports of processed tomato-based products to Germany increased by 18.1% over the last year (2023) compared to 2022, rising from 867 million euros to 1.024 billion euros. With 608 million euros in exports to Germany, Italy is by far the leading supplier of these products, accounting for just under 60% of the total share.

Focusing on the three main product categories, Italy exported 232 million euros worth of whole or chopped tomatoes to Germany, with a share of just under 78%. Additionally, Italy exported 248 million euros worth of other processed tomato-based products such as "passata" (pureed strained tomatoes), tomato pulp, etc., accounting for 50.3% of the market in 2023. Lastly, Italy exported 128 million euros worth of ketchup and other tomato-based sauces, with a 55% market share. (Source: Eurostat)

### German Imports in Value of Tomato Derivatives from Italy and the Rest of the World



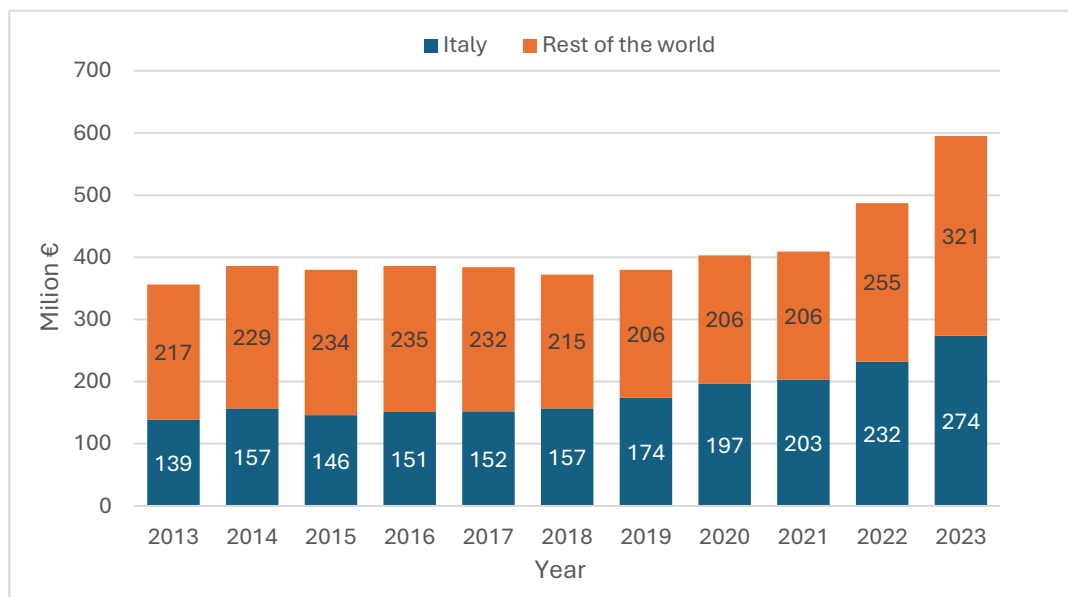
Source: Eurostat; sum of values for customs codes 200210, 00290, 210320.

## FRANCE

In 2023, the total value of tomato derivative imports in France reached a record figure of 594.4 million euros, an increase of 22% compared to 2022. With a value of approximately 274 million euros, Italy contributed more than 46% of the total and is France's leading supplier.

Regarding the three main product categories, Italy exported 89 million euros worth of whole or chopped tomatoes to France, accounting for just over 58% of the total value. Additionally, Italy exported 96 million euros worth of processed tomato products, such as "passata" (strained tomatoes), tomato pulp, concentrate, etc., with a 47% share in 2023. Lastly, Italy exported 88 million euros worth of ketchup and other tomato-based sauces, representing around 37% of the market. (Source: Eurostat)

### **French Imports in Value of Tomato Derivatives from Italy and the Rest of the World**



Source: Eurostat; sum of values for customs codes 200210, 00290, 210320.