

# Invest in AGRO-FOOD in Emilia-Romagna

The **agro-food cluster** in Emilia-Romagna is known as a leader on an international level not only for combining tradition and innovation but also for achieving high standards of food quality and safety.

Companies in our region are competitive both in vegetable and animal production. They are skilled and efficient at processing and preserving these products; as well as in cross sectors such as agricultural mechanics and food packaging.



## Invest in high quality products

In Emilia-Romagna there are **32** PDO (Protected Designation of Origin) and PGI (Protected Geographical Indication) **certified products**, of which the most well known names internationally are Parmigiano Reggiano – Parmesan cheese, Prosciutto di Parma – Parma ham and Aceto balsamico di Modena – Balsamic vinegar from Modena. There were more than 4,500 producers of **organic products** in 2008. The **research laboratories** in the Regional High Technology Network are organized in a **thematic platform** (an established group of research laboratories specializing in agro-food issues) and work on the **quality and safety** of raw materials, processing, machinery, equipment, finished products, **health issues** and on the **enhancement and development of traditional products**.

## The agro-food cluster on an international level

The cluster has a **high level of exports**, 5.3 billion Euros in 2008, mainly to the European market. Among the **leading sectors** in foreign markets the ones to mention are agricultural machinery as well as vegetable and animal production with outstanding meat, fresh fruit and processed food products (in particular cereals, dairy, fruit and vegetables). There are **8 international trade fairs** that cover this sector and are connected either directly or indirectly with the cluster.

## Invest in local specialization

The agro-food cluster as a whole is quite evenly spread all over the region. The highest concentrations of numbers employed are in the provinces of Bologna, Parma and Modena, followed by Reggio Emilia and Forlì-Cesena. Looking at the individual sectors in more detail there are actually specialized fields and items in all the provinces. Cooperatives also play an important role in the development of this cluster in our region.

Among the **production of vegetables** the highest figures are of cereals, potatoes and vegetables (tomatoes in particular), pears, nectarines and wine. With **animal production**, cow milk stands out the most, followed by poultry, rabbits, pork and beef products and eggs. **The industry that specializes in the processing of products** plays a considerable role in agro-food but the cluster also involves other **important sectors** such as **agricultural machinery**, one of the region's best performing industries as well as **food packaging**. The **chilled food chain** is very efficient and well established in our region and contributes significantly in maintaining the freshness and high quality of products from our region.

## LEADING FACTORS

- Internationally known brands.
- Export figures of 5.3 billion Euros in 2008. The agricultural machinery exports sector in our region accounts for 30.2% of total national export figures.
- Laboratories and regional research centres which are organized in a thematic agro-food Platform.
- Revenue from regional agriculture amounted to 4.1 billion Euros in 2008.
- The Regional Rural Development programme supports agriculture and provided finance of 134 million Euros in 2009 alone.
- The EFSA, the European Food Safety Authority, has its headquarters in Parma.

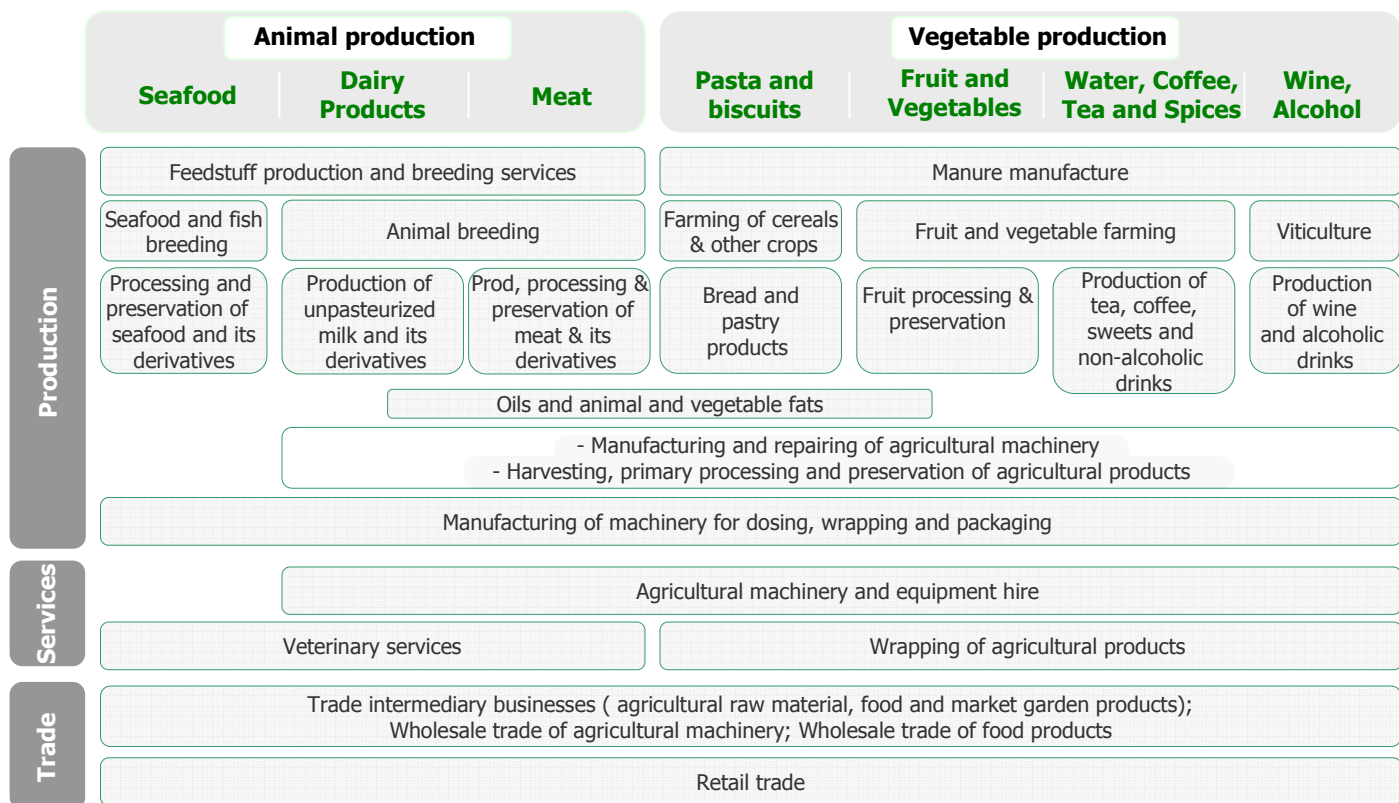
## SOME AGRO-FOOD COMPANIES FROM THE REGION





### The agro-food cluster: its structure and its sectors

The **agro-food cluster** is divided into two main areas, **animal and vegetable production** which have common **cross sectors**. Added to this are the **service** and **trade** sectors.



### Companies and the number employed

Agro-food cluster – Local units and number employed: absolute values and quotas of the totals (Asia,2006).

Sub-Clusters	Macrosectors	Local Units	% Quota of local units in the cluster	Number employed	% Quota of number employed in the cluster
Animal production	Seafood	26	0.1%	330.3	0.2%
	Dairy products	882	3.0%	7,690.9	4.2%
	Meat	1,138	3.9%	17,595.9	9.7%
	Feedstuff production	120	0.4%	2,049.3	1.1%
	<b>Sub-cluster total</b>	2,166	7.4%	27,666.4	15.2%
Vegetable production	Pasta and biscuits	4,416	15.0%	21,559.3	11.9%
	Fruit and vegetables	177	0.7%	8,492.5	4.7%
	Water, tea, coffee, sweets and spices	695	2.4%	6,782.3	3.7%
	Wine and alcohol	193	0.7%	2428.8	1.3%
	Manure manufacture	38	0.1%	915.5	0.5%
	<b>Sub-cluster total</b>	5,519	18.8%	40,178.4	22.1%
Mixed production	Oils and fats (both of animal and vegetable origin)	50	0.2%	893.5	0.5%
	<b>Sub-cluster total</b>	50	0.2%	893.5	0.5%
Cross sectors	Manufacturing/repairing of agricultural machinery	831	2.8%	10,862.3	6.0%
	Manufacturing of machinery for dosing, wrapping and packaging	1,309	4.5%	22,482.9	12.4%
	Wholesale trade (of agricultural raw material, food and market garden products); intermediary businesses	7,951	27.1%	28,012.9	15.4%
	Retail trade	9,459	32.2%	48,587.7	26.8%
	Services (hire, packaging, etc.)	2,063	7.0%	2,891	1.6%
	<b>Sub-cluster total</b>	21,613	73.6%	112,837	62.1%
<b>CLUSTER TOTAL</b>		<b>29,348</b>		<b>181,575,3</b>	

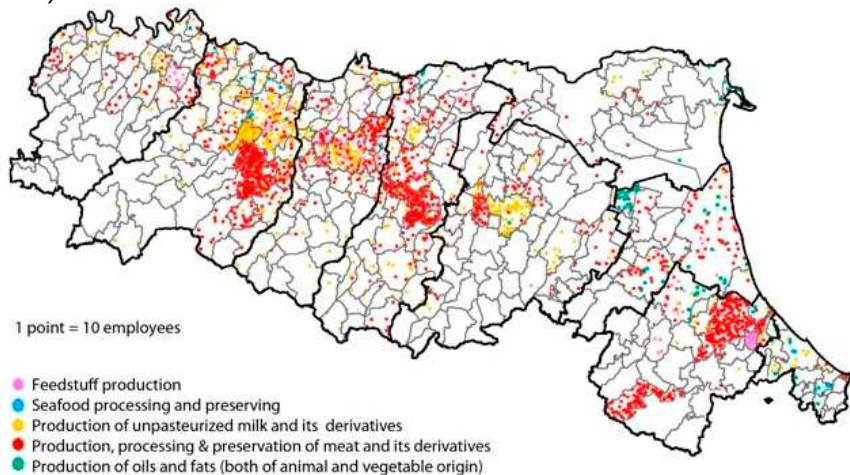


### The regional agro-food cluster

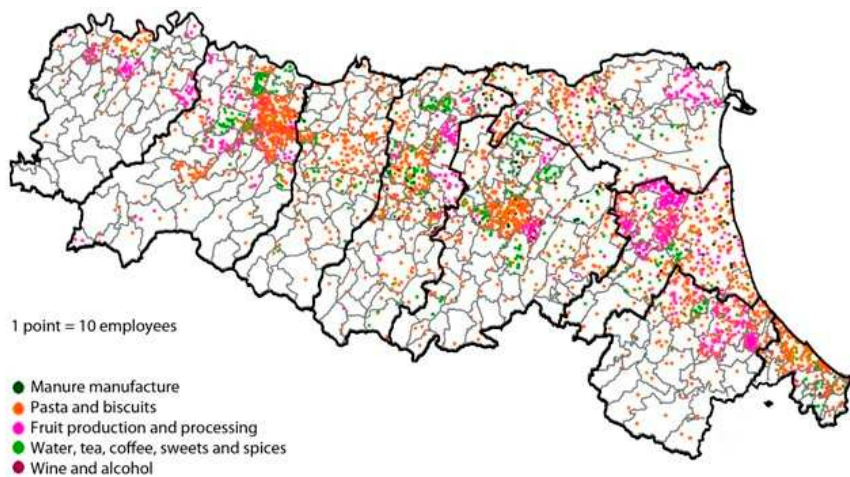
Source: Asia Databank - 2006

The agro-food cluster is spread all over the region with high concentrations of particular divisions and sectors. "Wholesale and retail trade" is not shown in the maps below as it is a sector which is distributed in a fairly homogeneous way in all the provinces of the region.

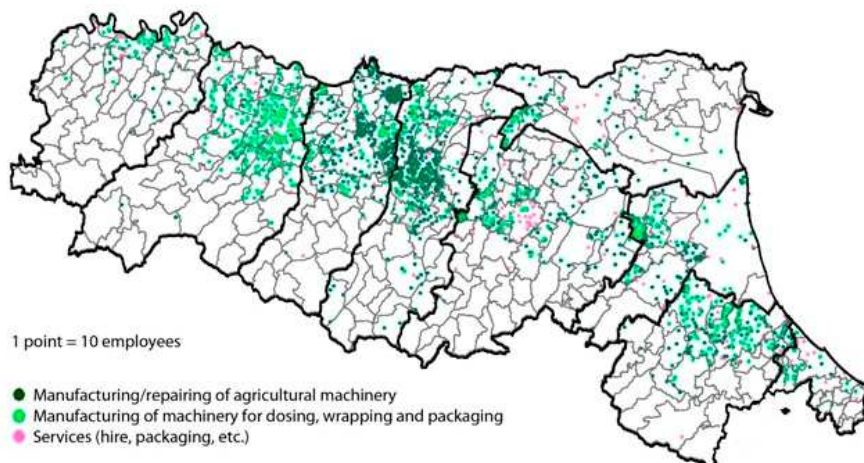
**Agro-food cluster** Number employed in the Animal Production sectors (Asia, 2006)



**Agro-food cluster** Number employed in the Vegetable Production sectors (Asia, 2006)



**Agro-food cluster** Number employed in Cross Divisions (Asia, 2006)



#### Areas with the highest concentration of numbers employed

The sectors connected to **meat and its derivatives** have a high concentration of people employed in the provinces of **Parma** (Langhirano) and **Modena** followed by **Forli-Cesena** (Cesena is the municipality with the highest numbers employed in the sector).

The production of **unpasteurized milk and its derivatives** is largely concentrated in the province of **Parma** (Collecchio having the highest concentration), followed by **Reggio Emilia**, **Bologna** and **Modena**.

The **production of feedstuff** is concentrated in the provinces of **Reggio Emilia** and **Forli-Cesena**, followed by Parma and Modena.

The **production of animal and vegetable fats** is mainly concentrated in the province of **Ravenna** (Conselice having the highest concentration).

The **bread and pastry products** sectors are largely concentrated in the provinces of **Parma** and **Bologna** and have high numbers of people employed also in Modena, Ravenna and Reggio Emilia.

The **fruit** sector shows a high concentration in the province of **Ravenna** (Alfonsine and Bagnacavallo in particular). This is followed by Parma and Forli-Cesena. The municipalities of Codigoro (Fe) and Podenzano (Pc) are also of importance.

**Tea, coffee, sweets and non-alcoholic drinks** businesses are largely concentrated in **Parma** (Collecchio, Trecasali, Noceto) with a high number of people also employed in **Bologna** and **Modena**.

**Wine and alcohol** production businesses have high numbers of people employed in **Bologna** (San Lazzaro) and **Modena** (Savignano, Finale Emilia) followed by Ravenna.

**Bologna** and **Ravenna** have the highest concentrations of people employed in the **manufacture of manure**, followed by Ferrara and Modena.

The **manufacture and repair of agricultural machinery** sector is predominantly based in the provinces of **Reggio Emilia** (Fabbrico, Bagnolo, Reggio Emilia) and **Modena** (Modena, Carpi).

The **food packaging** sector is spread over a large part of the region and has the highest concentrations of numbers employed in the province of **Parma** (Parma, Collecchio) and significant numbers in the municipalities of Bazzano, Cesena, Piacenza, Massa Lombarda, Forli and Carpi and in the Val D'Enza (Reggio Emilia).



## The agro-food cluster on an international level

### Exports

Source: Istat Coeweb Databank

In 2008 exports from the agro-food cluster in our region amounted to around 5.3 billion Euros, 17.3% of the national total. The various agro-food sectors represent 10.7% of total exports from Emilia-Romagna.

### Where we export to

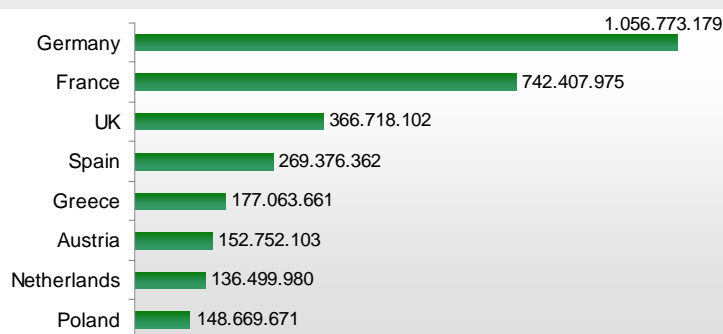
We mainly export to Europe which makes up almost 80% of total exports from the cluster, followed by North America.

Percentage of total exports per destination - Coeweb 2008

EU 27	North America	Other European countries	Asia / Far East	Central and South America	Australasia & other territories	Middle East	Other African countries	North Africa	Central Asia
<b>71.1%</b>	8.5%	8.0%	3.7%	2.3%	1.7%	1.5%	1.5%	1.4%	0.3%

#### The main EU countries we export to

Exports in 2008 (data in Euros)



### The sectors and export trends

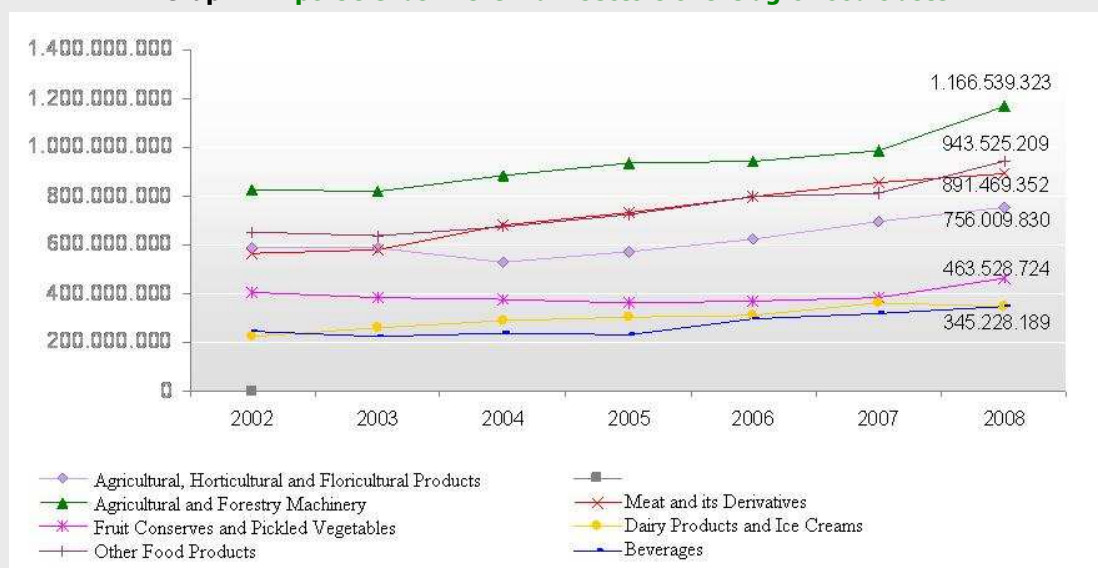
The Agro-food cluster export trends

<b>2004-2006</b>	<b>+13.5%</b>
<b>2006-2008</b>	<b>+18.4%</b>
<b>2004-2008</b>	<b>+34.4%</b>

In 2008 total exports from the cluster showed a growth trend even though the effects of the international crisis have had a noticeable impact on some sectors since the beginning of 2009.

The sectors in the following graph represent 83% of total exports. Other than agricultural machinery, the meat sector is of great importance as are "other food products" and "agricultural, horticultural and floricultural products".






Graph – Export trends in the main sectors of the agro-food cluster





## The agro-food cluster on an international level

International Trade Fairs

	<b>CIBUS</b> <b>CIBUS TEC</b> <a href="http://www.cibus.it">www.cibus.it</a>	<b>Cibus – International Food Fair</b> held at the Parma trade fair site. The 2008 edition (Cibus + DolceItalia) hosted 2,351 exhibitors from 24 countries on 120,000 m <sup>2</sup> of exhibition space, received 60,750 visitors from 102 countries with 500 buyers. DolceItalia is a confectionery show which takes place alongside Cibus. <b>Cibus Tec – Trade fair showing innovations in the food industry.</b> The 2007 edition hosted 858 exhibitors from 27 countries on 27,318 m <sup>2</sup> of exhibition space and received 21,762 visitors from 105 countries. In 2009 the number of visitors went up to 25,000.
	<b>EIMA INTERNATIONAL</b> <a href="http://www.eima.it">www.eima.it</a>	International Showcase of <b>Agricultural Machinery</b> held at the Bologna trade fair site. 1,635 exhibitors (36.3% from abroad) and over 140,000 visitors attended in 2008.
	<b>MACFRUT</b> <a href="http://www.macfrut.com">www.macfrut.com</a>	International Exhibition of <b>plants, technologies and services for the production, conditioning, marketing and transport of fruit and vegetables</b> , held in Cesena (FC). It covered 30,000 m <sup>2</sup> of exhibition space, hosted 703 exhibitors (20% from abroad), saw the presence of 81 foreign countries and received 21,510 visitors (20% from abroad) in 2009.
	<b>SANA</b> <a href="http://www.sana.it">www.sana.it</a>	<b>SANA - International Exhibition of natural products:</b> food, health and the environment, held at the Bologna trade fair site. A total of 67,220 visitors (5,190 from abroad) with 100 buyers on an area of 45,000 m <sup>2</sup> in 2009.
	<b>SAPORE</b> <a href="http://www.saporerimini.it">www.saporerimini.it</a>	An event which represents the <b>food, beverage and seafood sectors dividing them into bar and restaurants</b> . First edition held in 2010, however, it is the combination of six previous trade shows: Mia (Alimentazione Fuori Casa- International food show), Frigus (Frozen food show), Oro Giallo (International extra virgin olive oil exhibition), MSE (Mediterranean Seafood Exhibition), DiVino Lounge (Wine, Food & more) and Pianeta Birra, Beverage & Co (International exhibition of beers, drinks, snacks, equipment and furniture for pubs and pizzerias).
	<b>SIGEP</b> <a href="http://www.sigep.it">www.sigep.it</a>	<b>SIGEP – International Exhibition of Artisan foods:</b> Ice Cream, Pastry, Confectionery and Baked items. It is held in Rimini and received 96,491 trade visitors (16,954 from abroad and hosted 720 companies on an exhibition space of 90,000 m <sup>2</sup> in 2010.
	<b>R2B - Research To Business</b> <a href="http://www.rtob.it">www.rtob.it</a>	International Expoforum on <b>Industrial Innovation</b> – Participants include companies and research bodies, some of which are part of the agro-food cluster, in particular in the sectors that represent the development of new products and processes, the characterization and selection of raw materials, design and validation of machinery and equipment, food production and packaging, biotechnology, etc.
	<b>MEC for PACK</b> <a href="http://www.mecforpack.it">www.mecforpack.it</a>	Show of Precision machining, Innovative Materials, Engineering, Technology, Electronics and Components for the <b>Manufacture of Automatic Packaging Machines</b> . Also includes <b>food packaging</b> systems. First edition held at the Bologna trade fair site in 2009.

Top investors

Some important foreign investors in the agro-food industry in Emilia-Romagna.

Company	Investor	Country of Origin	Type of business
HARIPRO SRL	LIGITAL BV	The Netherlands	Transformation of animal blood, production of plasma and other items mainly as fertilizer for use in the food industry
PIONEER HI-BRED ITALIA SEMENTI SRL	PIONEER HI-BRED INTERNATIONAL	United States	Seeds for professional agriculture
NUNHEMS ITALY SRL	NUNZA BV	The Netherlands	Produces vegetable seeds for professional growers
MEC-TRACK SRL	CATERPILLAR INC.	United States	Spare parts for tractors and agricultural machinery
ITALTRACTOR OPERATIONS SPA	TITAN EUROPE PLC	United Kingdom	Agricultural tractors
SIDEL FILLING SRL	TETRA LAVAL AB	Sweden	Bottling machinery
NIRO-SOAVI SPA	GEA GROUP AG	Germany	High pressure homogenizers and pumps for the food industry
LOUIS DREYFUS ITALIA SPA	LOUIS DREYFUS & CIE SA	France	Wholesale trade of cereals, grain, flour, oilseed and other products
AGCO ITALIA SPA	AGCO CORP.	United States	Wholesale trade of tractors and agricultural machinery



## Services available to agro-food businesses in Emilia-Romagna

### Research and innovation

#### **Advanced Technology Network**

Agro-food Platform

ASTER – <http://htn.aster.it>

#### **Laboratories**

**BIOGEST.SITEIA** - Laboratory for the management and genetic improvement of biological resources connected to the agro-food industry - Universities of Modena and Reggio Emilia

**CIPACK** - Laboratory for the packaging of food products – University of Parma

**C.I.M.** – Laboratory for magnetic resonance in the food industry – University of Parma

**CRPA LAB** – Laboratory for Sensory Analysis on Food products of Animale Origin – Animal Production Research Centre - University of Bologna - [www.crpa.it](http://www.crpa.it)

**SITEIA – SITEIA.PARMA** – Food Safety, Technology and Innovation – University of Parma

**CIRI Agroalimentare** – Interdepartmental Centre for Industrial Research - University of Bologna

#### **Innovation centres**

**CENTURIA RIT (Romagna Innovazione Tecnologia)** – Research Centre to promote innovation and technology particularly in the agro-food sector - [www.centuria-rit.com](http://www.centuria-rit.com)

**CITIMAP** – Centre for Innovation in the use of remote sensing in the mechanical industry for Precision Agriculture - [www.citimap.it](http://www.citimap.it)

### Associations covering the sector

**EFSA** – European Food Safety Authority. Based in Parma. [www.efsa.europa.eu](http://www.efsa.europa.eu)

The main national **associations of machinery manufacturers and suppliers in the agro-food cluster:**

- UNACOMA National Union of Agricultural Machinery Manufacturers [www.unacoma.it](http://www.unacoma.it)
- U.NI.MA National Union of Agricultural Mechanisation Companies [www.unima.it](http://www.unima.it)
- ENAMA National Institute for Agricultural Mechanisation [www.enama.it](http://www.enama.it)
- UNACMA National Union of Distributors of Agricultural Machinery [www.unacma.it](http://www.unacma.it)

**Invest in agro-food  
in Emilia-Romagna**



**For further information:**  
[www.investinemiliaromagna.eu](http://www.investinemiliaromagna.eu)  
[investinemiliaromagna@ervet.it](mailto:investinemiliaromagna@ervet.it)

### Universities – Specialized courses

**University of Bologna** [www.unibo.it](http://www.unibo.it) - [www.agraria.unibo.it](http://www.agraria.unibo.it)

#### **Degree courses in:**

- Biotechnology
- Economics and marketing in the agribusiness system
- Animal production and wildlife control
- Food and catering science
- Territorial science and agro-forestry environmental management
- Agricultural technology
- Food technology
- Viticulture and enology

#### **Five year degree courses in:**

- International market gardening
- Planning and management of regional agro-ecosystems, forestry and landscape
- Agricultural science and technology
- Safety and quality of animal products
- Food science and technology (Cesena faculty)

#### **Master's in:**

- Nutritional and Functional Food Science
- Sustainable Development of Agricultural and Rural Areas of the Adriatic-Ionian Basin (Enhancement and development of Traditional and Typical Agro-food Products)
- Food Mycology
- Land and water conservation
- Vintage -Vine, Wine and Terroir Management

**University of Parma** [www.unipr.it](http://www.unipr.it)

#### **Three and five year degree courses in:**

- Food science and technology
- Gastronomy Studies
- Mechanical engineering for the food industry

#### **Master's in:**

- Marketing and logistics of food products
- Food safety and quality

**Università Cattolica in Piacenza** - [www.unicatt.it](http://www.unicatt.it)

#### **Three and five year degree courses:**

- Agricultural Science and Technology
- Food Science and Technology

#### **Five year degree course:**

- Economics and management in the agro-food industry

**IFOA (Vocational Training and Education Institute)**

[www.ifoa.it](http://www.ifoa.it)

Master's in Food Marketing and Communication Studies in the Agro-food industry