CSI Company Profile

- CSI has been born in the sixties
- Works on certification and testing activities in many industry sectors
  - Certifications
  - Food Packaging, Materials Lab
  - Inspections
  - Mechanicals dept.
  - EU directives verifications
  - other depts.
CERTIFICATION DEPARTMENT

4 AREAS

- **Produce certifications** (Globalgap, voluntary certification schemes, Traceability certifications against ISO 22005, IPM certifications)

- **Food process related certifications** (BRC, IFS, ISO 22000)

- **Certifications for food contact materials** (BRC IoP, voluntary CSICERT/UNI certifications, ISO 22000 in food packaging companies)

- **Inspection activities** in food and non-food sector through several partnerships with retailers and private companies

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CERTIFICATION DEPARTMENT

ACCREDITATIONS AND ACKNOWLEDGEMENTS IN FOOD/FOOD CONTACT SECTOR

CSICERT is accredited by Accredia, unique Accreditation body in Italy, for the following schemes:

- BRC Food (Global Standard For Food Safety) and BRC IoP (all scopes)

- IFS Food and IFS Logistic

- Globalgap Fruit and Vegetables (option 1 and 2)

- ISO 22000:2005: accredited for category M (packaging)
THE QUESTION IS:

IS THE GLOBALGAP CERTIFICATION AN IMPORTANT TOOL TO GIVE OPPORTUNITIES TO THE PRODUCERS TO DEVELOP STRATEGIES TO ACCESS TO THE GLOBAL MARKET?

THE CSI’S EXPERIENCE ON ITALIAN MARKET

12/10/2010

INTRODUCTION

Almost 70% of European consumers buy fruit and vegetables in supermarkets and hypermarkets

Purchase of fruit and vegetables in Europe by the consumers

Source: European Commission

12/10/2010
INTRODUCTION: THE ITALIAN MARKET

ITALIAN TOTAL 2009 PRODUCTION FOR FRUIT AND VEGETABLES: 22,000,000 TONS

ITALIAN TOTAL EXPORT 2009: 3,400,000 TONS

INTRODUCTION: THE ITALIAN MARKET

Italian Export of Agriculture Products

- + 21.9% 2010 vs 2009 for non permanent crops
- + 3.3% 2010 vs 2009 for permanent crops

Source: ICE elaboration on ISTAT data – values in k€
INTRODUCTION: THE ITALIAN MARKET

The total export amount is represented by nonpermanent and permanent crops for the 80% of exported vegetal products.

GLOBALGAP CERTIFICATION IN ITALY

Spain has grown during 2010 up to about 1000 certified sites surpassing Italy on the Ranking of Country with more certified sites of the world. Italy remains on the top of the list decreasing number of certified sites from 19327 to 18353 in less than one year.

(source: Globalgap Annual Report 2010)
GLOBALGAP CERTIFICATION IN ITALY

INCIDENCE OF ITALIAN CERTIFIED PRODUCERS

Certified Sites in Italy

- Italy
- Europe
- Worldwide

BUT...

(source: Globalgap Annual Report 2010)

ITALIAN GLOBALGAP MEMBERSHIP RATE

Retailers

- Italy
- Worldwide

Producers

- Italy
- Worldwide

WHY?

(source: www.globalgap.org)
GLOBALGAP CERTIFICATION IN ITALY – the context

1. Italian Retailers usually adopt their own standards to qualify and manage the fruit and vegetables suppliers (only one Italian retailer is directly involved with Globalgap certification and is effective member);
   - some national retailers trust into Option 1 certification as the control is on 100% of certified companies instead of sampling procedures allowed with Option 2 certifications;
   - other retailers with the headquarters based in Europe but outside Italy purchase on Option 2 certified companies because they base their activity on a structured QMS.

Many positions on qualification strategies by different retailers different situation against other standards recognized by GFSI as IFS (preferred) or BRC (as well accepted)

2. Frequently Italian Retailers don’t purchase Fruit and Vegetables directly but through brokers / agencies

3. Relevant presence of wholesale markets for fruit and vegetables purchasing by retailers and/or agencies

WHAT DOES THIS MEANS FOR ITALIAN MARKET?

PRODUCTION

QUALIFICATION

PURCHASE

FINAL CONSUMER

GROWER
(singel or group of them)

BROKER
(buys specific, scouts and drives the certifications basing on its own needs)

GROWER
(buys on its own needs)

12/10/2010
GLOBALGAP CERTIFICATION IN ITALY

THE ROLE OF BROKER AGENCIES

1. Generally is the only interface for foreign retailers (but there are some cases that show a different situation, as UK retailers are now demonstrating)

   → Benefits for final consumers for a selling price reduction

2. Brokers represent the only chance for small producers usually certified under option 1 to access to European markets and retailers’ stores

GLOBALGAP CERTIFICATION IN ITALY

THE GLOBALGAP CERTIFICATION FOR ITALIAN PRODUCERS IS AN ESSENTIAL TOOL TO ACCESS TO WORLDWIDE MARKETS (EXCEPTED TOMATOES FOR INDUSTRY PROCESSING)

WHICH ARE THE MAIN CERTIFIED PRODUCTS DESTINATED TO EXPORT MARKETS?
GLOBALGAP CERTIFICATION IN ITALY

THE APPLE CASE

Usually sold by Producer Groups certified under option 2:

Melinda

Consorzio Melavi

30% of total certified growers

16 consortiums and 4500 producers
3 factories and 900 producers

CONCLUSIONS

GLOBALGAP CERTIFICATION IS...

A SYSTEM OF TOOLS THAT HELP THE PRODUCERS TO:

1. USE AND PROMOTE GOOD AGRICULTURAL PRACTICES
2. RESPECT WORKERS' SAFETY CONDITIONS WORLDWIDE
3. RESPECT THE ENVIRONMENT REDUCING THE IMPACTS OF HUMAN OPERATIONS IN AGRICULTURE
4. PROMOTE THE FOOD SAFETY FOR CONSUMERS

IS A GLOBAL TOOL TO ACCESS TO THE GLOBAL MARKET IN A WORLDWIDE CHALLENGE FOR ALL THE PRODUCERS THAT WANT TO FOCUS THEIR ACTIVITIES ON SAFE PRODUCTS AND GOOD QUALITY PRODUCTIONS
THANKS FOR YOUR ATTENTION

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QUESTIONS AND ANSWERS