RETERURALE NAZIONALE 20142020

Economy, policy and value chain at farm level

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DELLA SOVRANITÀ ALIMENTARE
E DELLE FORESTE

UNIONE EUROPEA
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Global rice production

- Global rice production is forecast to recover by 1.3 percent in 2023/24 to **523.5 million tonnes** (milled basis). Much of the increase on a monthly basis comes from United States and South Korea, offsetting a reduction for Costa Rica.

  According to American analysts, Italy will record the most pronounced percentage increase (+18.5%) after the drought-stricken 2022/23 campaign

- 56,3 million tonnes traded worldwide

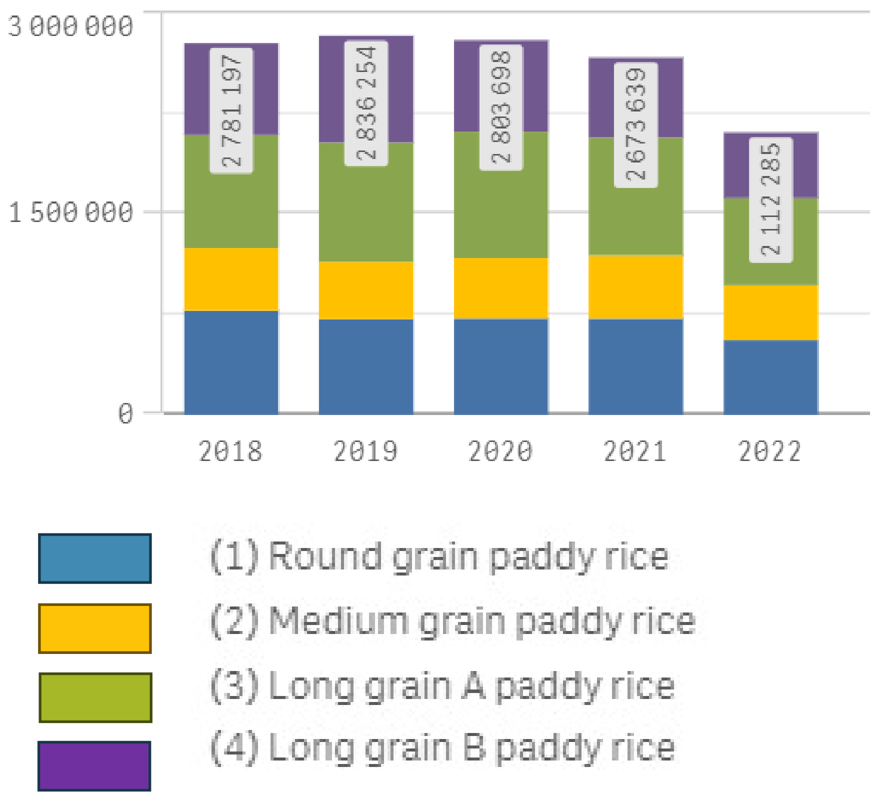
(Usda, 2023)

Europen rice production

The EU produces *(Italy, France, Greece, Bulgaria, Hungary, Portugal, Romania, Spain)* around **2.8 million tonnes** of **paddy rice** (Japonica and Indica) per year. That translates into around 1.7 million tonnes of milled equivalent rice.

The EU is traditionally a **net importer** (around 1.2 million tonnes milled equivalent is imported).

Rice in the EU is mainly used for food, whereas broken rice has more industrial applications.



Rice production (europa.eu)

Italian rice production

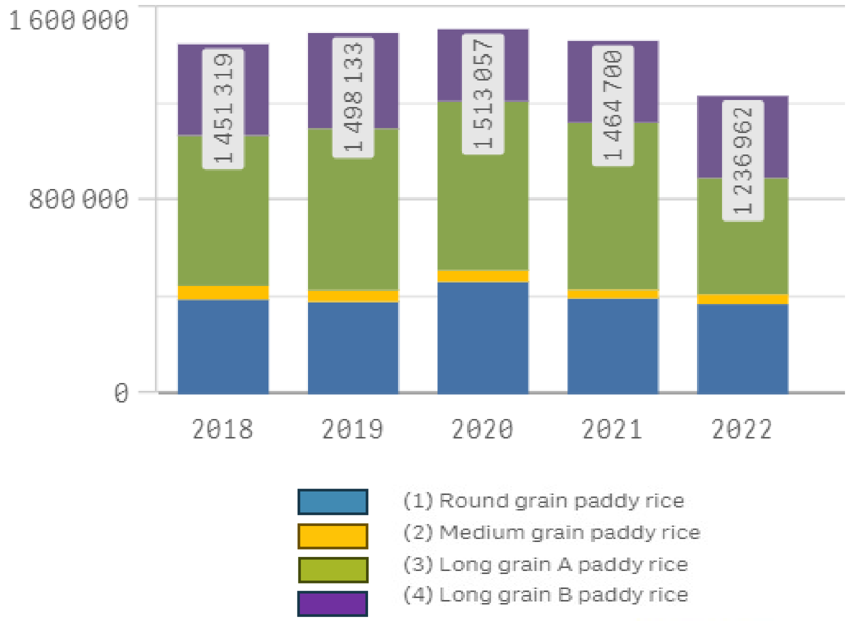
- 218.420,96 hectares (-3,8% sul 2021)
- 3.557 number of producers

(Ente risi)

- The Italian production guarantees **50% of the entire rice production of the EU**, for which it is the leading supplier, with a range of varieties and a level of quality unique in the world.

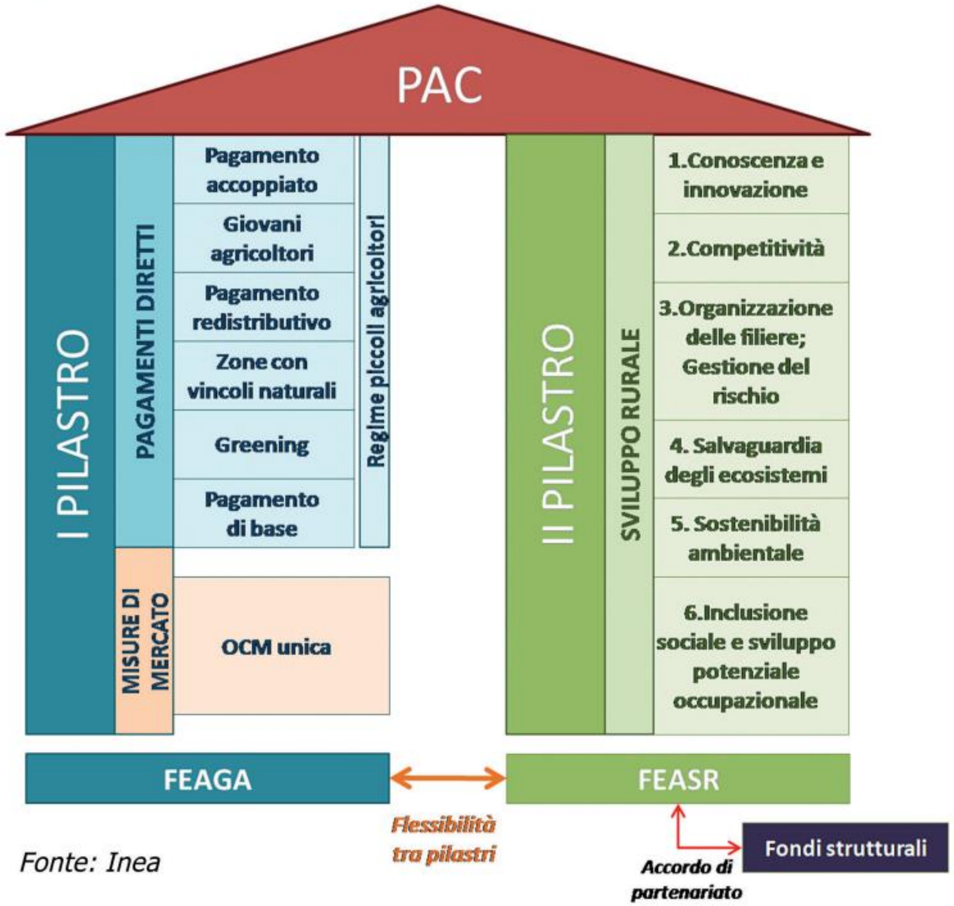
- Italians **consume** on average between 5 and 6 kilos of rice per head.

- In Italy, 9 out of 10 rice fields are concentrated in Piedmont, Lombardy and Veneto.

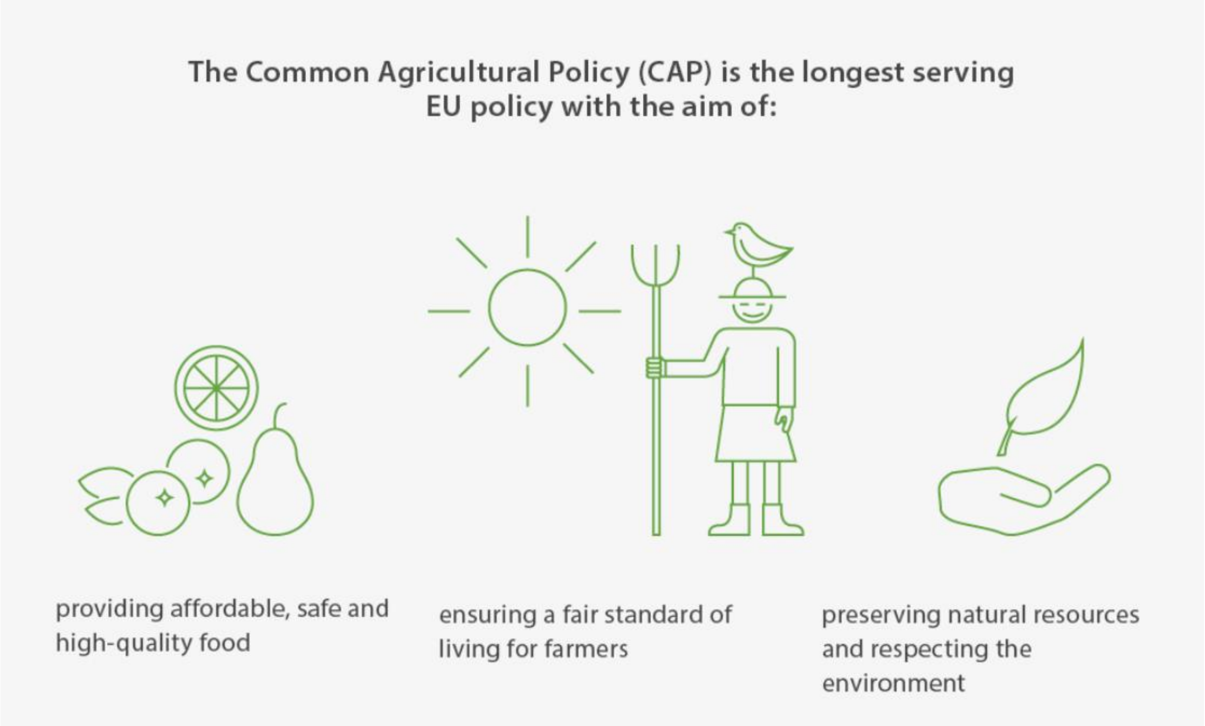


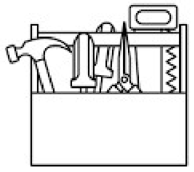
Common agricultural Policy

Fig. 2 – L'architettura della Pac 2014-2020

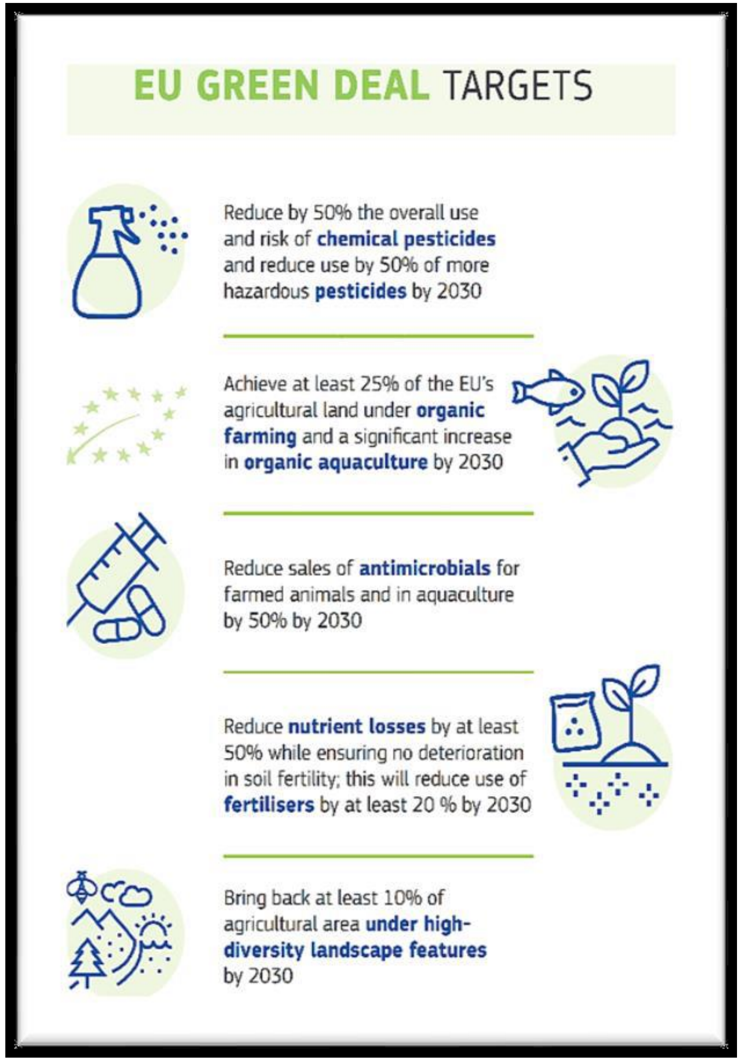


Fonte: Inea





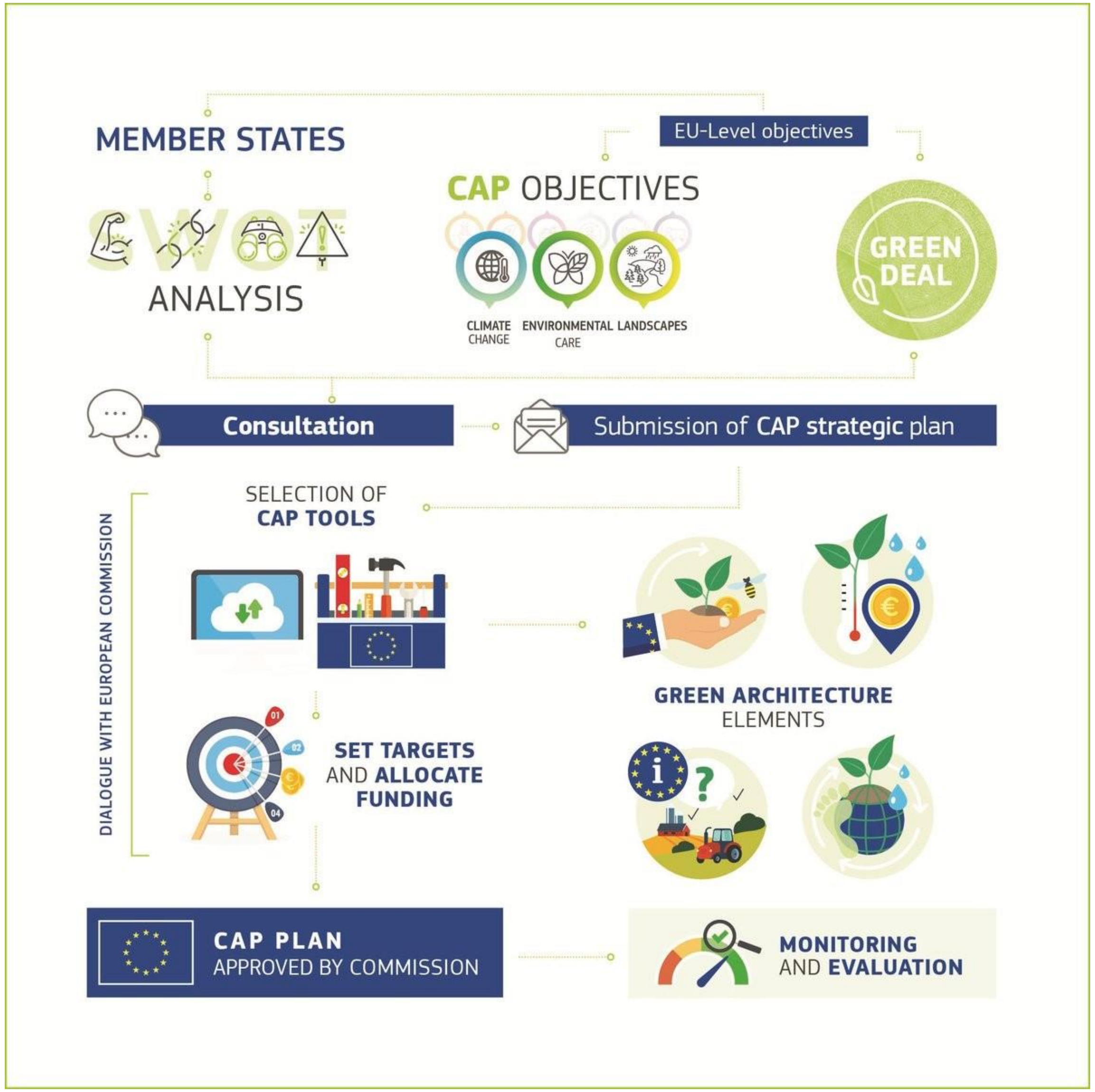
NEW CAP OBJECTIVES – CAP 2023-2027



competitiveness

sustainability

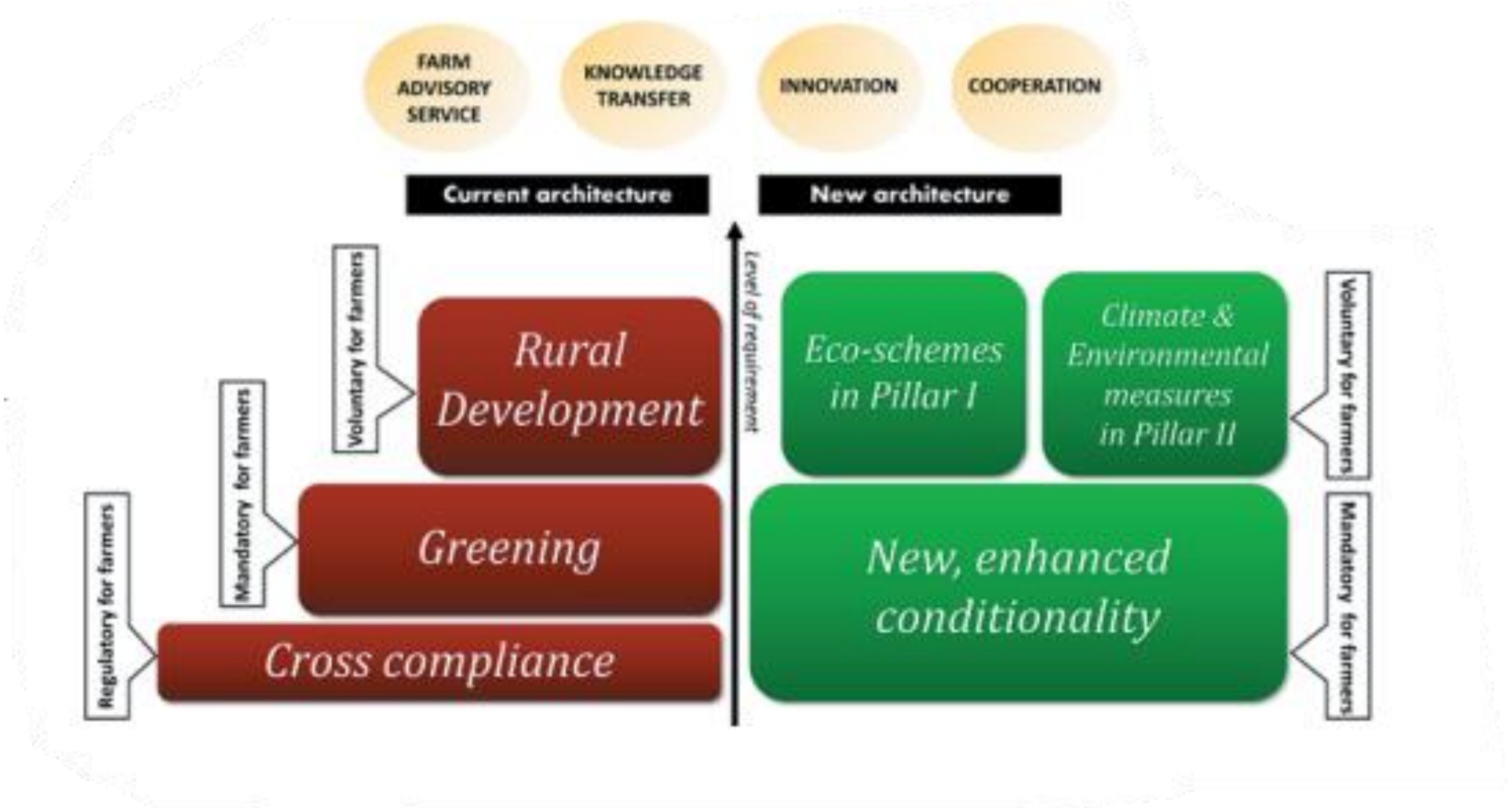
NEW DELIVERY SYSTEM



CAP toolbox

Intervention	Aggregate	GO
Basic Income Support for Sustainability - BISS (Art.21)	Income support	GO1
Complementary Redistributive Income Support for Sustainability CRISS (Art.29)		
Natural or other area-specific constraints ANC (Art.71)		
Area-specific disadvantages resulting from certain mandatory requirements (Art.72)		
Risk management tools (Art.76) (ex. sectoral interventions)	Risk management	GO1
Investments, including investments in irrigation (Art.73&74)	Investments	GO1
Coupled Income Support CIS (Art.32)	Coupled support	GO1
Cotton (Art.36-41)	Sectoral interventions (+ cotton)	GO1
Wine (Art.57-60)		
Apiculture (Art.54-56)		
Hop (Art.61-62)		
Olive oil and table olives (Art.63-65)		
Other sectors (Art.66 – 68)		
Eco-scheme (Art.31)	Environmental and climate	GO2
Environmental, climate-related and other management commitments AECC (Art.70)		
Complementary Income Support for Young Farmers CIS-YF (Art. 30)	Young farmers & generational renewal	GO3
Setting up of young farmers and new farmers and rural business start-up (Art.75)		
Cooperation, included LEADER (Art.77)	COOP	GO3
Knowledge exchange and dissemination of information (Art.78)	AKIS	Horiz.

NEW GREEN ARCHITECTURE



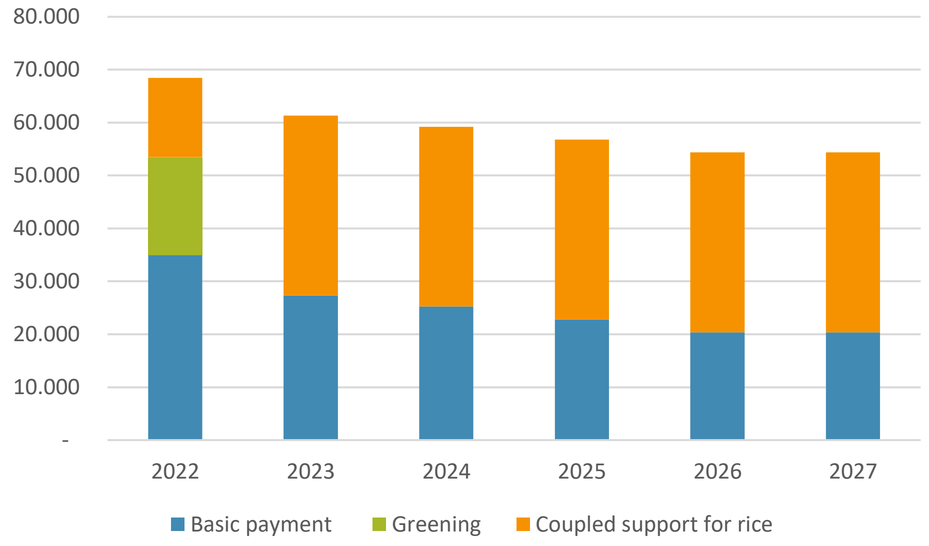
Spotlight on rice – I pillar

The **new basic payment** is much lower than the old basic payment + greening, resulting in a large reduction in support for rice farmers.
In the new CAP, the redistributive payment (10% of the national envelope) and the ecoschemes (25%) are very selective and **not accessible to rice producers**.

Eligibility conditions	CAP 2015-2022	CAP 2023-2027
Area	The whole country	The whole country
Rice ceiling (€ million)	33,320,383	74,085,407
Amount (€/ha)	147.29 (2020)	340 (estimate)
UAA	226,214 (2020)	220,000 (estimate)

maintenance of historical titles, albeit subject to convergence, and a significant increase in coupled support for rice cultivation.

Data from a 100 ha specialised rice farm



Spotlight on rice – II Pillar integrated farming (SRA 01)

Integrated Production' provides support per hectare of UAA to beneficiaries who undertake to adopt the technical provisions set out in the Integrated Production Specifications (IPR) established for the cultivation phase, adhering to the National Quality System Integrated Production (SQNPI).

crop groups	unit amounts (€/ha)
other arable land	115
forage crops	60
fruit trees	350
walnut and chestnut	120
extensive horticulture	200
intensive horticulture	350
Rice	**130**
wine growing	300

Spotlight on rice – II pillar – Organic farming (SRA 29.1 & 29.2)

The objective of **Action SRA29.1** is to increase the area cultivated with **organic farming methods through conversion from conventional agriculture.**

The objective of **Action SRA29.2** is to contribute to the **maintenance of the organic UAA** in order to in order to consolidate, in the national agricultural production context, the environmental results in terms of increasing biodiversity, improving water quality and soil fertility.The intervention envisages a commitment period of five years.

crop groups	unit amounts (€/ha)	
	SRA 29.1 Conservation	29.2 Maintenance
other arable land	320	260
forage crops	380	330
annual and biennial officinal plants	300	240
Poliannual officinal plants	380	300
walnut and chestnut	320	260
horticulture	650	480
pastures and meadows pastures	35	25
pastures and meadows pastures for animals	380	330
pastures	85	60
Pastures for animals	380	330
Rice	**480**	**355**
wine growing	880	600

Spotlight on rice – II pillar specific commitments rice fields (SRA 22)

The intervention consists of 2 actions that aims to **mitigate the negative consequences of the practice of drying on the biodiversity of rice fields and encouraging the ecological endowment** of the rice fields to meet the biological needs of the faunal species typical of these environments.

	ACA 22	€/ha/year
Action 1	BASE – I1 sowing in water	100
Action 2	BASE - I2.1 digging a ditch (60x40)	150
	BASE - I2.1 digging a ditch (60x60)	200
	BASE - I2.1 digging a ditch (80x100)	350
	BASE – I2.2 paddy-field chambers	1400
Action agg 1	AGG – IA.1 Stubble	50
Action agg 2	AGG – IA.2 Winter submersion	220
Action agg 3	AGG – IA.3 Mechanical embankment control)	110

Main remarks – evidences

1. Rice farmers, as like everyone else, access BISS but do not access ecoschemes and suffer a large **reduction in the direct payment**.

2. But they recover most of their losses through more than doubled **coupled support**: from EUR 33 million in 2022 to EUR 74 million in 2023-2027.

3. Rice farmers have always **paid close attention to the evolution of the CAP**, as the sector has consistently received significant support from the European Union; in fact, the level of direct payments to rice is on average three times the national average.

Characteristics	Piemonte
OTE	specialised rice farms (1520)
Number of observations (nr)	105
Revenue	398.424
Support	82.922
Variable costs	156.889
Fixed costs	29.291
Farm Net ValueAdded	240.522

Characteristics	UM	Piemonte	Lombardia
Number of observations	nr	126	49
Rice surface area	ha	89,27	69,45
irrigated area	*%*	*100*	*100*
Grain yield	q/ha	70,0	59,0
Price	€/q	42,0	41,0
Total Gross Production	**euro/ha**	**3.025**	**2.475**
Direct Costs	euro/ha	1.048	1.132
Gross Margin	euro/ha	1.977	1.342

ANALISI AZIENDALE RICA ITALIA (crea.gov.it)

Thank you

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