



 Sviluppo Campania

**FSC**  Fondo per lo Sviluppo  
e la Coesione



**AGRIFOOD**



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# THE AGRIFOOD CHAIN IN CAMPANIA

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Tradition, clustering and traceability. The food industry is one of the main players for Campania region's economy.

Employees in the sector account for **6% of the regional workforce**, a large part of them is engaged in the agricultural sector.

Campania has a wide variety of **PDO and PGI** products, some of which, such as tomatoes, mozzarella, pasta, olive oil and wine, are widely known abroad.

Over the time, the historical processing activity has created a considerable number of companies specialised in the design and construction of machinery for canning and dairy sector.

Furthermore, territorial specialisation has favoured the start-up and development of training activities at university and post-graduate level.



The elements highlighted above have, over time, strengthened the role of the Campania food chain industry also as regards foreign trade: in fact, about one third of Campania's exports are generated by this supply chain.

A further contribution to strengthening the supply chain comes from the innovation. For example, the adoption of a specific regional regulation to encourage the adoption and use of so-called **'blockchain' technology**.



This is expected to ensure complete product traceability, thus curbing the well-known problem of counterfeiting and products, especially those destined for foreign markets.



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# CHAIN IN THE CAMPANIA REGION

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## Population

The number of enterprises operating in the agrifood sector in 2021 increased by 1% compared to 2019.

*Tab. 1 – Distribution of enterprises - Agribusiness chain – Campania Region. Years 2019-2021*

Year	2019	2020	2021
<b>Total</b>	<b>8.053</b>	<b>8.076</b>	<b>8.120</b>

*Source: data Infocamere 2021*

## Distribution by class of employees and production value

Comparing companies dimension, which we see shown below in Tables 2 and 3 and Figs. 1 and 2 (distribution by class of employees and value of production), the data on the agri-food chain in the Campania Region is in the national average. It is well known, in fact, that the national production is mainly composed of MPMI (Micro/Small and Medium Enterprises).

This characteristic allows possible investors in the area to find a favorable environment, with a large supply industry to support their activities. Neighboring MPMI can allow the investing enterprise to outsource many complementary activities, carried out flexibly and quickly.

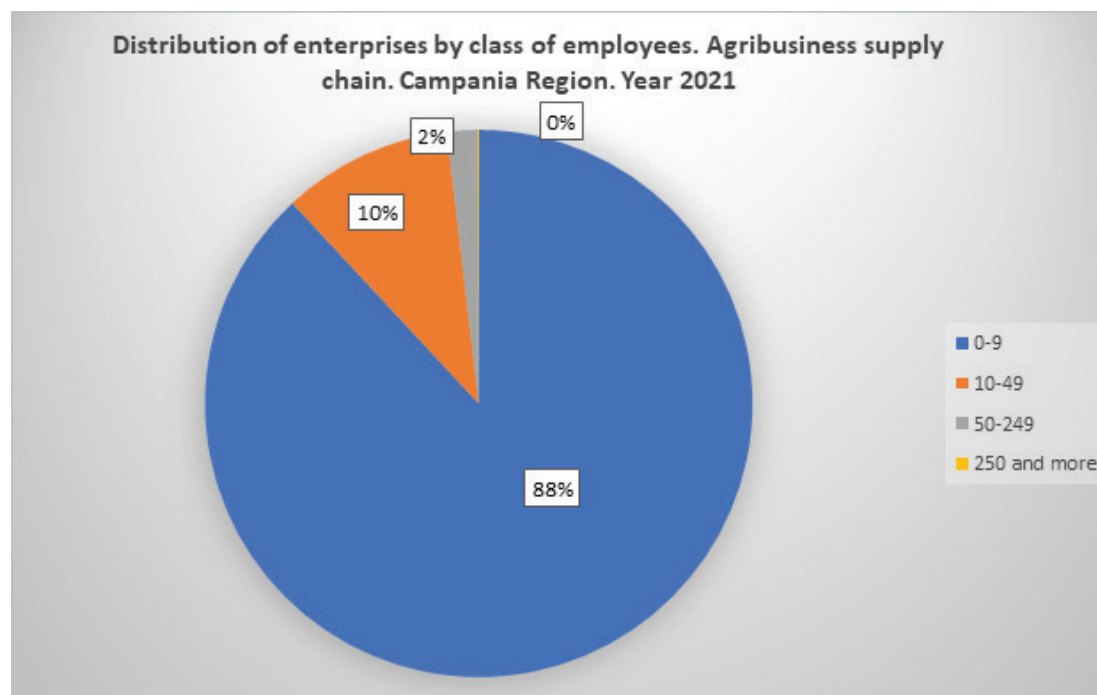


Tab. 2 – Distribution of enterprises by class<sup>1</sup> of employees. Agribusiness supply chain. Campania region. Year 2021

Class of Employees	Micro 0-9	Small 10-49	Medium 50-249	Large 250 - oltre	Total companies
<b>Total for class</b>	<b>7.152</b>	<b>818</b>	<b>143</b>	<b>7</b>	<b>8.120</b>

Source: data Infocamere 2021

Fig. 1 - Distribution of enterprises by class<sup>1</sup> of employees. Agribusiness supply chain. Campania region. Year 2021.



Source: data Infocamere 2021

<sup>1</sup> EU MPMI classification



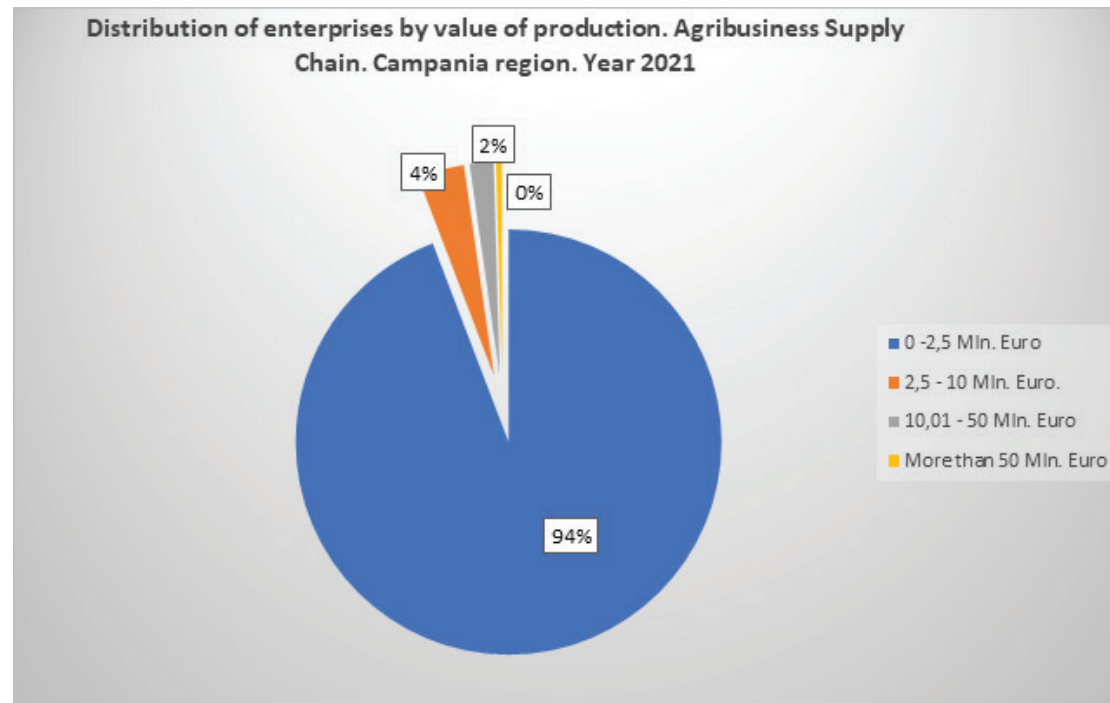


Tab. 3 - Distribution of enterprises by value of production. Agribusiness supply chain. Campania region. Year 2021.

0 -2,5 Mln. Euro	2,5 – 10 Mln. Euro	10,01 -50 Mln. Euro	More than 50 Mln. Euro	Total
7.649	288	147	36	8.120

Source: data Infocamere 2021

Fig. 2 - Distribution of enterprises by value of production. Agribusiness supply chain. Campania region. Year 2021

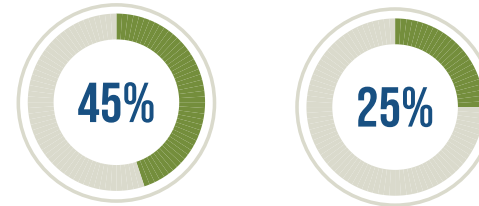


Source: data Infocamere 2021



## Distribution by Province

As shown in the table and figure below, the highest concentration of enterprises in the sector is located in the provinces of Naples (45%) and Salerno (25%).



### The sector distributes its production with local characterisations.

In the province of Naples, enterprises are mainly active in the processing of fish and fish derivatives, the beverage industry (particularly wine, alcohol and spirits), dairy and other food products.

In the province of Salerno, the fruit and vegetable (also with the so-called IV gamma processing), dairy and olive-growing sectors are important.

Most of the companies in the province of Caserta operate in the production of foodstuffs for livestock and in the dairy sector.

In the provinces of Avellino and Benevento there are numerous quality wine-growing enterprises, which contribute significantly to the production of the agri-food sector.



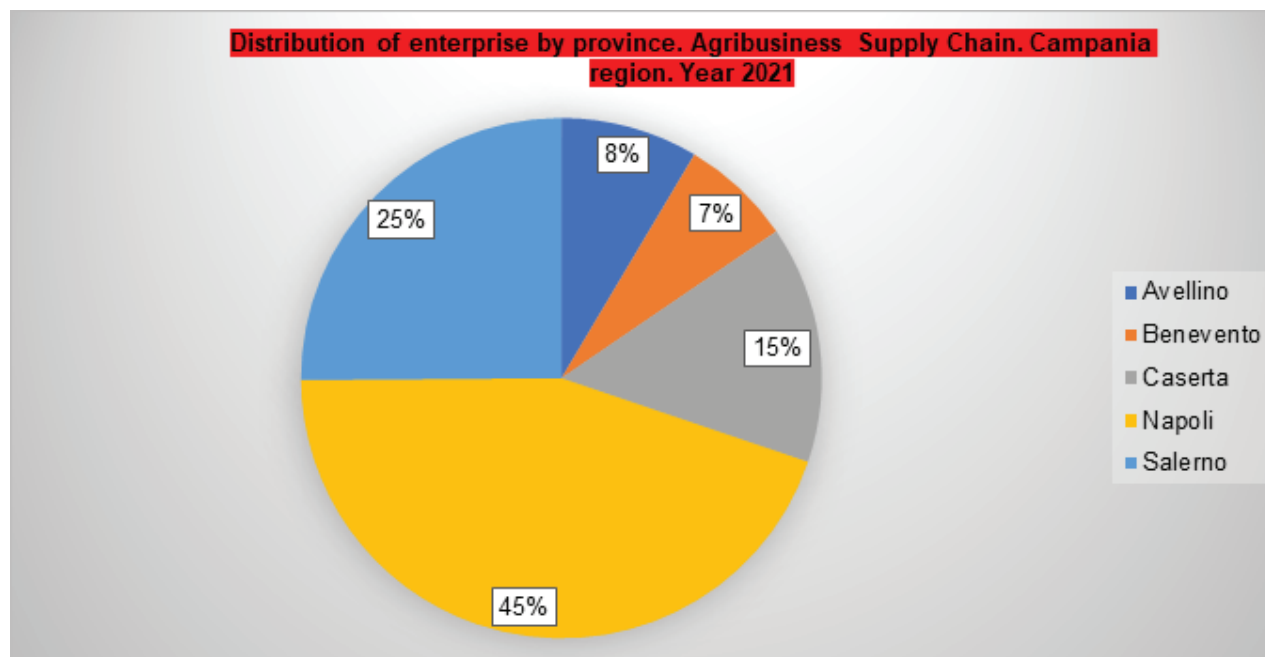


Tab. 4 - Distribution of enterprises by province. Agribusiness supply chain. Campania region. Year 2021.

Avellino	Benevento	Caserta	Napoli	Salerno	Total
693	563	1.198	3.627	2.039	8.120

Source: data Infocamere 2021

Fig. 3 - Distribution of enterprises by province. Agribusiness supply chain. Campania region. Year 2021.



Distribution of enterprise by province. Agribusiness Supply Chain. Campania region. Year 2021

Source: data Infocamere 2021





## THE AGRICULTURAL AND FOOD DISTRICT OF NOCERA-GRAGNANO



The agricultural vocation of **'Campania Felix'** with its traditional productions, tomatoes, has determined, over time, the spontaneous aggregation of a considerable activity connected to the transformation of the products of the land, with the birth and development of a mechanical industry and wood, plastic and cardboard packaging industries. Numerous transport and service companies complete the chain. A true 'district' has therefore been formed, also identified by specific regional provisions, in the 'Nocera-Gragnano Agrifood District'.



Distretto  
Industriale Agroalimentare  
**Nocera Inferiore - Gragnano**





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# INCENTIVES AND FINANCING<sup>2</sup>

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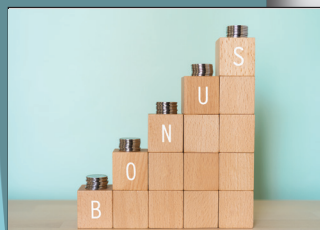
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<sup>2</sup> "Source: [incentivi.gov.it](http://incentivi.gov.it) / [mise.gov.it](http://mise.gov.it) / [invitalia.it](http://invitalia.it) - febbraio 2023"



### New Sabatini Green (since 1st of January 2023)

**Subsidy made available by the Ministry of Enterprise and Made in Italy.** The Target is to facilitate companies' access to credit and increase the competitiveness of the production system. It supports investments to purchase or lease machinery, equipment, plant, capital goods, as well as software and digital technologies. As of 1 January 2023, the 'Sabatini Green' programme started supporting SMEs' investments in new facilities, plant and equipment, with low environmental impact, as part of programmes aimed at improving the eco-sustainability of products and production processes.



### Contributions Machinery 4.0 Ministry of Economic Development

**Tax credit** aimed at supporting and incentivising companies that invest in new tangible and intangible capital goods functional to the technological and digital transformation of production processes for production facilities located in Italy.



## Development Contracts



**Facilities for large programmes** (at least EUR 20 million for industrial development and environmental protection and 7.5 million euro for processing and marketing of agricultural products for the agricultural product processing sector) of strategic importance, a specific procedure, the Development Agreement, is in place, which implies a fast track for resources, a reduction in time and greater involvement of the administrations involved.

## Digital Export Bonus MAECI Ministry of Foreign Affairs and ICE Agency



**Non-repayable contribution** aimed at supporting manufacturing micro and small enterprises in their internationalisation activities through digital solutions

### Grow in the South Fund

It provides for the **acquisition of shareholdings**, mainly minority shareholdings, in the risk capital of small and medium-sized enterprises with registered offices and operations in the eight regions of southern Italy: Abruzzo, Basilicata, Calabria, Campania, Molise, Apulia, Sardinia and Sicily.



### Southern Investment Bonus 2023

**Tax credit** in favour of companies that purchase new capital goods intended for production facilities located in southern regions. It is granted in the form of a tax credit ranging up to 45% of the expenditure incurred, depending on the characteristics of the enterprises concerned and the area in which the production structure is located.





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# THE ZES - SPECIAL ECONOMIC ZONE

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The ZES, **Campania's Special Economic Zone**, according to the Regional Strategic Plan, **covers 37 of the 550 municipalities in the region**, an area populated by **2,043,800 inhabitants** (35% of the regional population), made up of **26 'strategic' areas** where there are production facilities, ports, interports, industrial development areas (ASI), and PIP areas.







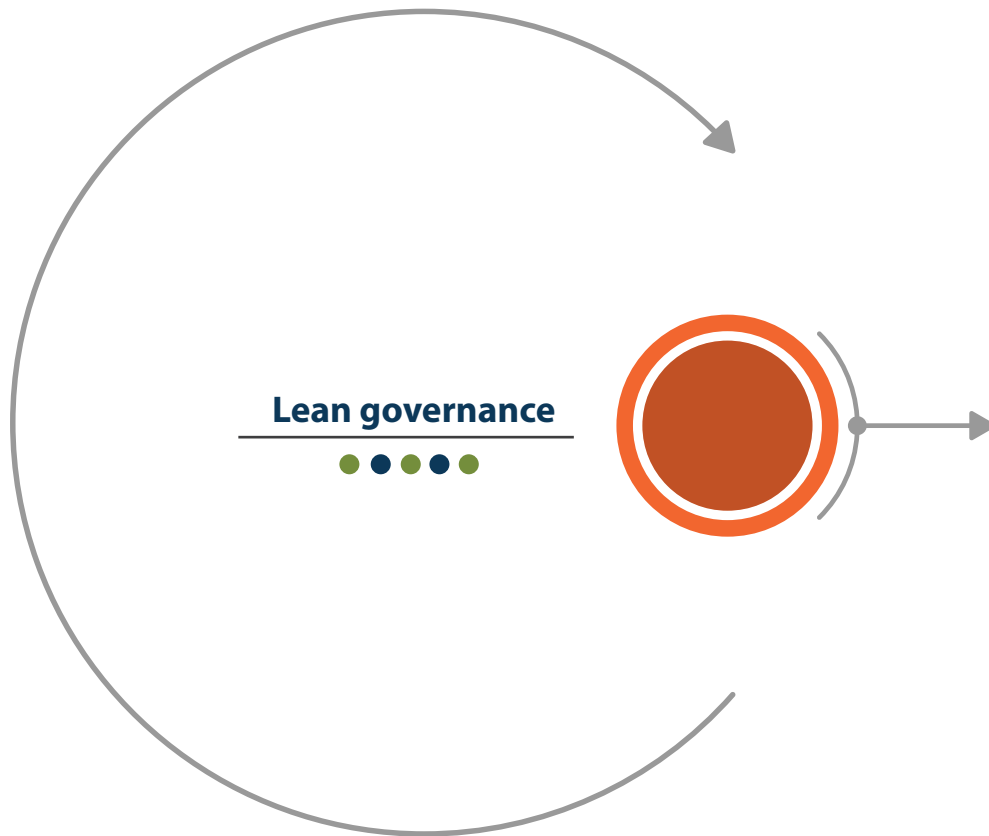
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# BENEFITS SETTLEMENT IN ZES

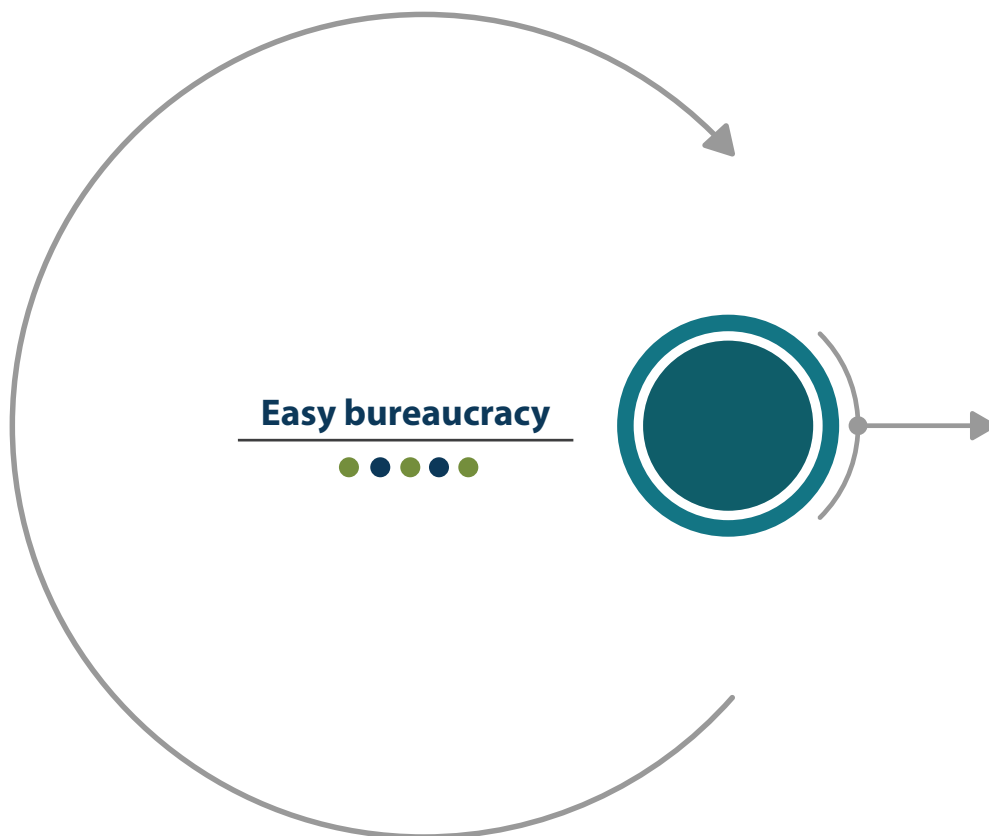
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The ZES is managed by an Extraordinary Commissioner with special powers as the main interlocutor for investments.





**Easy bureaucracy**



Investment programmes enjoy a simplified and speeded-up administrative process thanks to reduced procedural deadlines, a single authorization and a dedicated desk.





25% credit of the investment (productive and real estate), for large companies, 35 per cent for medium-sized companies and 45 per cent for small companies, up to EUR 100 million for productive investments and investments in real estate, (also through leasing contracts);

Income tax for activity in ZES reduced by 50%, starting from the tax period in which a new activity is undertaken and for the following six tax periods;

Partial contribution exemption for private sector employers for the period 2021-2029. The relief is 30% of social security contributions payable until 31 December 2025; 20% of social security contributions payable for the years 2026 and 2027; 10% of social security contributions payable for the years 2028 and 2029.





## NATIONAL AND INTERNATIONAL PROTECTION MARKS



(source: MIPAAF - List of Italian designations entered in the Register of protected designations of origin, protected geographical indications and traditional specialties guaranteed (EU Regulation No. 1151/2012 of the European Parliament and of the Council of 21 November 2012 - updated 23 August 2022))

The Campania food industry can count on a high number of products certified with national and international protection marks, in particular:



### Protected Designation of Origin (PDO) products

*Cipollotto Nocerino, Colatura di alici di Cetara, Fico bianco del Cilento, Mozzarella di Bufala Campana, Cilento extra virgin olive oil, Colline Salernitane extra virgin olive oil, Irpinia - Colline dell'Ufita extra virgin olive oil, Penisola Sorrentina extra virgin olive oil, Terre Aurunche extra virgin olive oil, Oliva di Gaeta, Pomodorino del Piennolo del Vesuvio, Pomodoro S. Marzano dell'Agro Sarnese-nocerino, Provolone del Monaco, Ricotta di Bufala Campana.*



### Protected Geographical Indication (PGI) products

*Paestum Artichoke, Montella Chestnut, Amalfi Coast Lemon, Sorrento Lemon, Marrone/Chestnut of Serino, Marrone of Roccadaspide, Melannurca Campana, Giffoni Hazelnut, Gragnano Pasta, Rucola of the Sele Plain, White Calf of the Central Apennines*



### Traditional Speciality Guaranteed (TSG)

*Mozzarella, Neapolitan Pizza*





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**D.O.P./D.O.C.G.** (Controlled and Guaranteed Designation of Origin) Wines Aglianico del Taburno, Fiano di Avellino, Greco di Tufo, Taurasi



**D.O.P./D.O.C.** (Controlled Designation of Origin) wines Aversa, Campi Flegrei, Capri, Casavecchia di Pontelatone, Castel San Lorenzo, Cilento, Costa d'Amalfi, Falanghina del Sannio, Falerno del Massico, Galluccio, Irpinia, Ischia, Penisola Sorrentina, Sannio, Vesuvius



**PGI** (Protected Geographical Indication) / IGT wines Benevento Beneventano, Campania, Catalanesca del Monte Somma, Colli di Salerno, Dugenta, Epomeo, Paestum, Pompeiano, Roccamonfina, Terre del Volturno.





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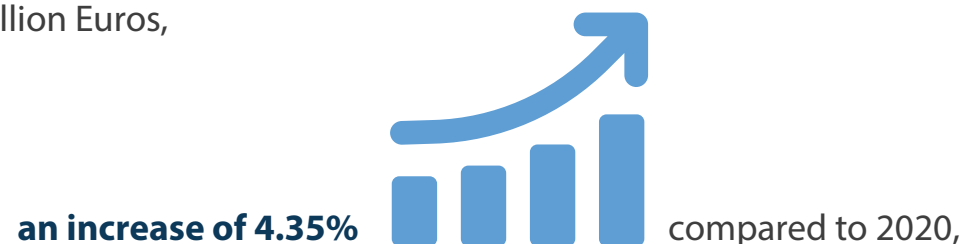
# IMPORT/EXPORT AGRI-FOOD CHAIN. CAMPANIA REGION

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The total value of exports 2021 of the Campania region in the food industry sector, for the commodity classes considered, amounts to 3 billion and 510 million Euros,

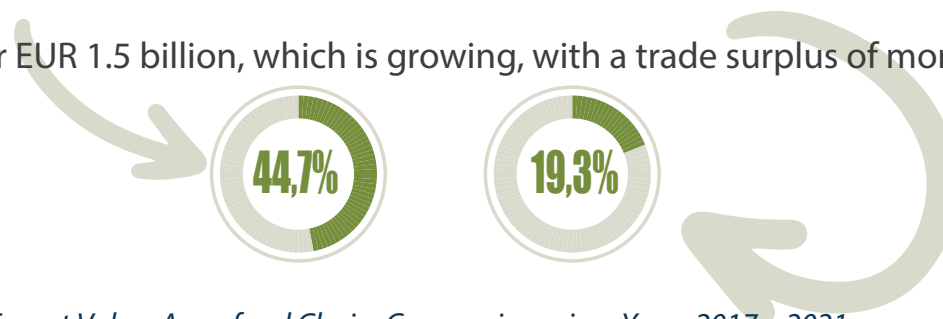


as represented schematically in the following table and graphically in Figure 5.

The product class that contributes most to exports is 'processed and preserved **fruit and vegetables**' with **44.7%**.

It is followed by 'bakery and **farinaceous products**' (19.3%) and 'other foodstuffs' (15.1%), and to a lesser extent the others.

Imports amount to just over EUR 1.5 billion, which is growing, with a trade surplus of more than EUR 2 billion.



Tab. 4 - Import-Export Value. Agro-food Chain. Campania region. Years 2017 – 2021

	IMPORT					TREND IMPORT 2020-21	EXPORT					TREND EXPORT 2020-21	BALANCE IMPORT/EXPORT 2021
	2017	2018	2019	2020	2021		2017	2018	2019	2020	2021		
TOTAL	1.416.061.002	1.386.874.027	1.523.166.759	1.320.264.030	1.502.838.490	▲	2.647.848.097	2.728.666.511	2.876.405.641	3.364.560.535	3.510.915.588	▲	2.008.077.098

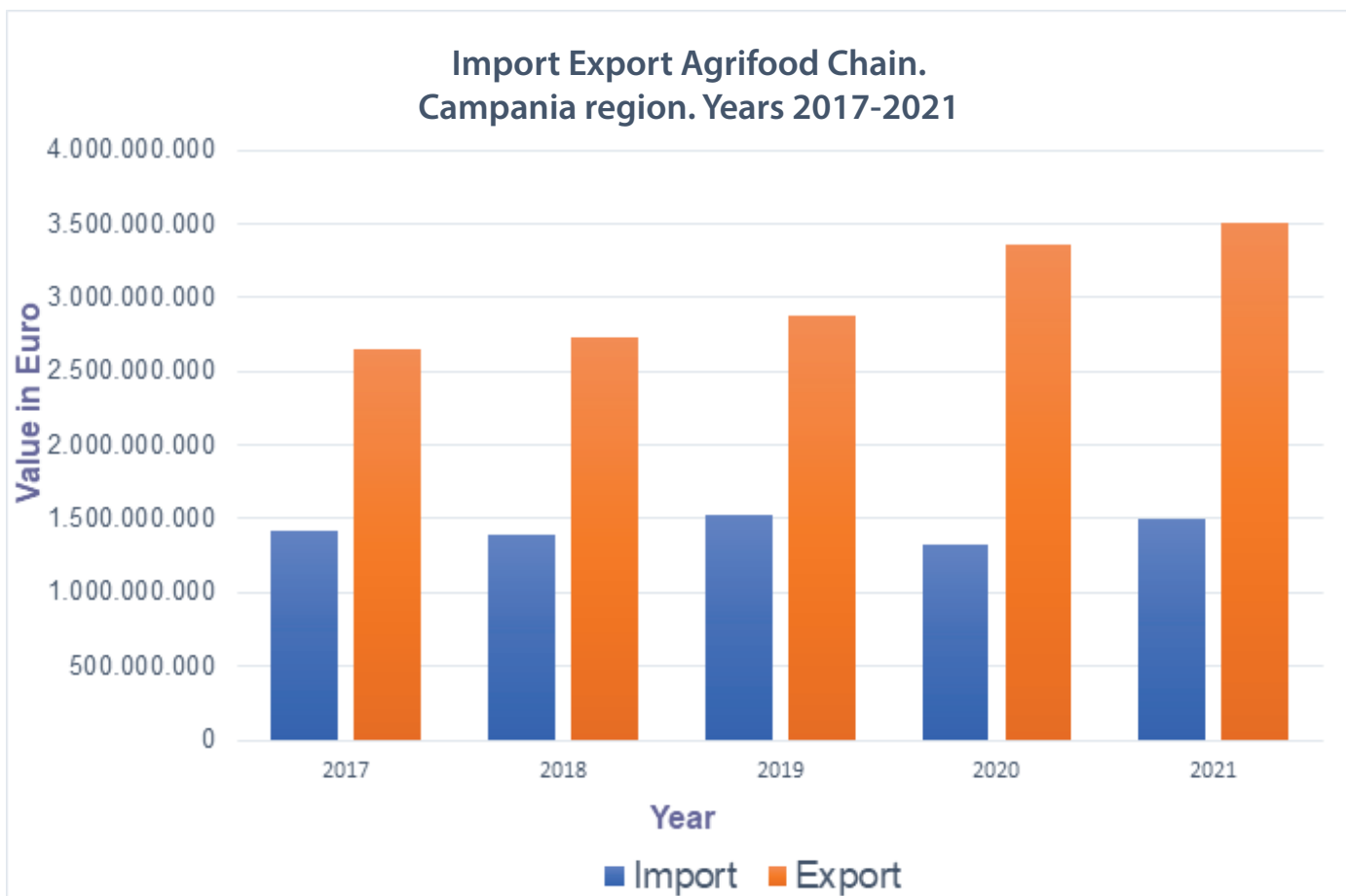
Source: Coeweb Istat Data Warehouse foreign trade statistics. Cumulative data 2021







Fig. 5 – Import-Export Value. Agrifood Chain. Campania region. Years 2017 - 2021



Source: Coeweb Istat Data Warehouse foreign trade statistics. Cumulative data 2021





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# TRAINING AND INNOVATION FOR THE AGRIFOOD SUPPLY CHAIN IN CAMPANIA

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The University education system in Campania has further developed its offerings in recent years, also taking into account the characteristics of the local economy, consolidating traditional skills related to the agrifood chain.



UNIVERSITÀ DEGLI STUDI DI NAPOLI  
**FEDERICO II**

**The University of Naples 'Federico II'**, with its historic **Department of Agriculture**, offers both three-year and master's degree courses.

### **The three-year degrees in Agricultural, Forestry and Environmental Sciences - Mediterranean Gastronomic Sciences - Food Technology - Viticulture and Oenology - provide skills:**



**For those who wish to complete a Master's degree (with an additional two years of study), there is the offer of courses in Agro-Environmental and Food Biotechnology - in Oenological Sciences - and in Forestry and Environmental Sciences, which form figures:**





“Parthenope”, another university in the regional capital, offers the innovative master's degree course in **'Fashion, Art and Food Management'**, delivered entirely in English, which analyses and studies transversally the sectors of excellence of the Made in Italy sector, grasping similarities in the competitive modes and critical success factors, reciprocal sources of inspiration and conditioning, and relevant synergic potential.

It trains entrepreneurs, administrators, managers and consultants responsible for strategic and operational processes in companies operating in both the Fashion Art and Food and complementary sectors (such as tourism), as well as other businesses strongly oriented towards creativity, innovation, quality and internationalisation.

The Master's degree in Fashion, Art and Food Management can take on entrepreneurial, managerial or consultancy roles, as well as in the fashion, art, food and tourism sectors.

The quality of the training offer also allows access to jobs in international contexts.





The University of Salerno offers the three-year degree in '**Management and valorisation of agricultural resources and protected areas**', which provides fundamental technical-scientific knowledge to promote synergies between the world of work in agriculture and the world of conservation and valorisation of areas of naturalistic-environmental value, basic and innovative technical skills in the field of agricultural sciences, and in systems for the management and valorisation of agricultural resources.

It therefore allows either direct entry into the world of work or, alternatively, access to two-year second-level courses leading to a Master's Degree.

There is also a **Master's Degree Course in Food Engineering**, which trains a professional figure of a technical nature, the food engineer, who uses the typical methods of chemical and process engineering to solve problems in the food industry.

The Department of Economic and Statistical Sciences has now reached the tenth edition of the **Advanced Training** and Cultural Update Course in '**Wine Business**', to train professional figures who are experts in economics, administration, management, marketing and communication of entrepreneurial initiatives in the wine sector, with a focus on wine tourism and internationalisation.







UNIVERSITÀ DEGLI STUDI  
DEL SANNIO Benevento

The University of Benevento organises the Professionalising Degree Course '**Food Technology for Confectionery Production**' with a job opportunity in the confectionery sector (quality, marketing, sales, etc.).

Other initiatives come from free universities, the '**Niccolò Cusano**' (Caserta), with its degree course in '**Agroindustrial Engineering**' (to provide knowledge and operational skills in the field of agri-food and manufacturing services and processes) and the '**Suor Orsola Benincasa**' (Naples), with the first-level Master's degree in '**Multimedia Communication of Food and Wine**', which aims to create a professional figure of communicator expert in the food sector, food and wine tourism, the promotion of 'Made in Italy' in the agri-food sector, and the communication and valorisation of the territory and typical local food and wine.





## MEDITECH



(Meditech Consortium - Mediterranean Competence Centre 4 Innovation) deploys Enabling Technologies of Industry 4.0 towards the dissemination of innovation practices in the production of goods and services in the national territory and in particular in the Mediterranean basin.

The only Competence Centre for Industry 4.0 in South of Italy, it represents an example of inter-regional collaboration between the Campania and Apulia regions, a reference point in the digitalisation of a number of sectors, including aerospace, automotive, shipbuilding, agro-food, pharmaceutical, energy, building and civil construction.



Meditech, located within the Città della Scienza (Science City) in Naples, is attended by 5 Universities of Campania, 3 Universities of Apulia and 22 leading industrial players (for the Agrifood sector they are Heinz Italia, Nestlé Italia, Rigoni di Asiago and Unilever Italia Manufacturing), promotes the 4.0 integration philosophy nationally and peculiarly in the Mediterranean basin, offering innovation services to enterprises through advanced training, orientation and project development methods.





## BLOCKCHAIN IN THE AGRIFOOD SUPPLY CHAIN



Regional Law no. 3 from March 2020 introduced the **Blockchain measure in the agrifood** supply chain. The initiative promotes the development, realisation and implementation of a system of tracking, from producer to consumer, and of tracking from consumer to producer, of the products of the agrifood and fishing supply chain, through a blockchain data management system that, by flowing into a multimedia platform, starts from the certainty of the characterisation and typification of the product at origin, in order to guarantee the safety and control of food products and increase consumer confidence in the work of institutions and companies.

The application is mainly aimed at the certification systems of the PDO, PGI, DOC and DOCG chains in order to facilitate access to information on the certain and typified origin, nature, composition and quality of the product, as well as to enhance the value of local productions, along the entire supply-chain from the producer to the final consumer. The tracking system can also be extended to other production sectors, in order to implement competitiveness at national and international level, in particular in the sectors characterising the RIS3 Campania areas.



Access to the blockchain technology and software infrastructure by participants in the agri-food chain is free of charge and on a voluntary basis.



## PIDMED DIGITAL ENTERPRISE POINT WITH A MEDITERRANEAN VOCATION



It is a service structure dedicated to the dissemination of digital culture and practice in MPMEs (Micro Small and Medium Enterprises) of all economic sectors.

The one in Salerno is a Digital Enterprise Point with a Mediterranean vocation, created in partnership with the University of Naples Federico II and the support of

UnionCamere, COINOR (University Service Centre for the Coordination of Special Projects and Organisational Innovation), CESMA (Centre for Advanced Metrological Services), Department of Social Sciences and the research/action programme SOCIETING4.0, on the basis of the national indications launched by the Ministry for Economic Development and the National Enterprise 4.0 Plan, now the Transition 4.0 Plan, regarding the activation of Digital Enterprise Points in the territory.

