



State of the art of Non-Wood Forest Products, focus on fiscality and new national and international regulations

Padova, 5th December 2018

Wild forest products: a hidden sector

Davide Pettenella

TESAF Dipartimento Territorio e Sistemi Agro-Forestali



A cluster of products A complex issue to deal



A picture made by Enrico Vidale (StarTree H2020 project)

TESAF Dipartimento Territorio e Sistemi Agro-Forestali





NWFP economic role

- FAO estimates that NWFPs generated **US\$88 billion** in 2011 ([SOFO, 2014](#)).
- **76 million tonnes** of food from the forest were consumed on average in 2011 ([SOFO, 2014](#)).
- **1 billion people** are thought to depend on *wild* foods ([Burlingame, 2000](#)).
- **80%** of the population of developing countries rely on traditional medicines, mostly plant drugs, for primary health care.

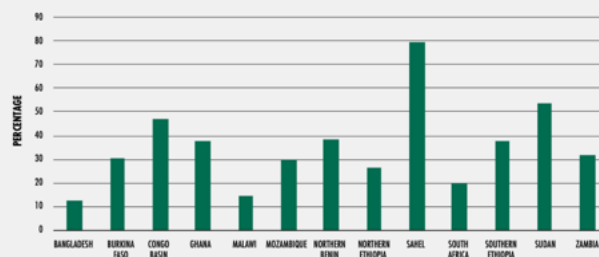
NWFP economic role

- In **SOFO 2018**: no data, only case studies

A focus only on the role of NWFP in DC



PERCENTAGE OF HOUSEHOLD INCOME FROM NON-WOOD FOREST PRODUCTS (NWFPs)



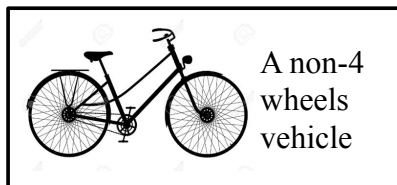
SOURCE: Adapted from Vira et al., 2015.

NWFP economic role

- NWFP in Europe: a market segment of the rural economy perceived as marginal and declining:
 - No clear definition

Definitions (source: Muir, 2018)

Non-wood forest products	NWFPs consist of goods of biological origin other than wood, derived from forests, other wooded land and trees outside forests. (FAO, 1999)
Non-timber forest products	The term NTFP encompasses all biological materials other than timber which are extracted from forests for human use (DeBeer & McDermott, 1989)
Wild forest products	"Wild product" results from the "collection of edible plants and parts thereof, growing naturally in natural areas, forests and agricultural areas" (EU Art. 12, comma 2, Reg. 834/07 "organic law")
Minor forest produce	All non-timber forest produce of plant origin including bamboo, brush wood, stumps, cane, tussar, cocoons, honey, wax, lac, or kendu leaves, medicinal plants, and herbs, roots, tubers and the like. (Government of India)
Secondary or side use of forests	All kinds of use in forests and forest lands not covered by forest, except for timber and minor forest materials, including: animal breeding, beekeeping, farming, processing of wood and wild fruits and berries, medicinal plants; placement of apiaries, collection of wild food resources, medicinal plants, technical raw materials and other; procurement of secondary forest resources (stumps, bark, etc.) Kyrgyzstan Forest Law
Forest by-products	E.g. berries, mushrooms, herbs, decorative plants as well as hunting, bee-keeping and the grazing of cattle. Categories of forest use: wood production, resin production, secondary forest materials and technological raw materials, the use of forest by-products, scientific research, cultural and social purposes, hunting economy, recreation (including tourism) and other forest uses not prohibited by law. Estonia Forest Law
Natural forest produce	Refers to wild or semi-cultivated plants or mushrooms which can be used as such or with some processing. This also includes the by-products of trees and soil materials. (Finland's National Forest Programme 2015)
Wild food	Wild food is defined as anything edible that requires no human input to increase its production (ACF, USA, 2008; ACF, 2012; FAO, 2004; FAO, 1999.)
Wild meat (bushmeat)/game meat	All meat from animals hunted or trapped for meat that is available for consumption; meat from game that roams in farms (a farm has an enclosed space) is excluded (UNECE, 2017).



NWFP

- Weak component of the society
- Defensive attitude in marketing
- Definition based on negative attributes

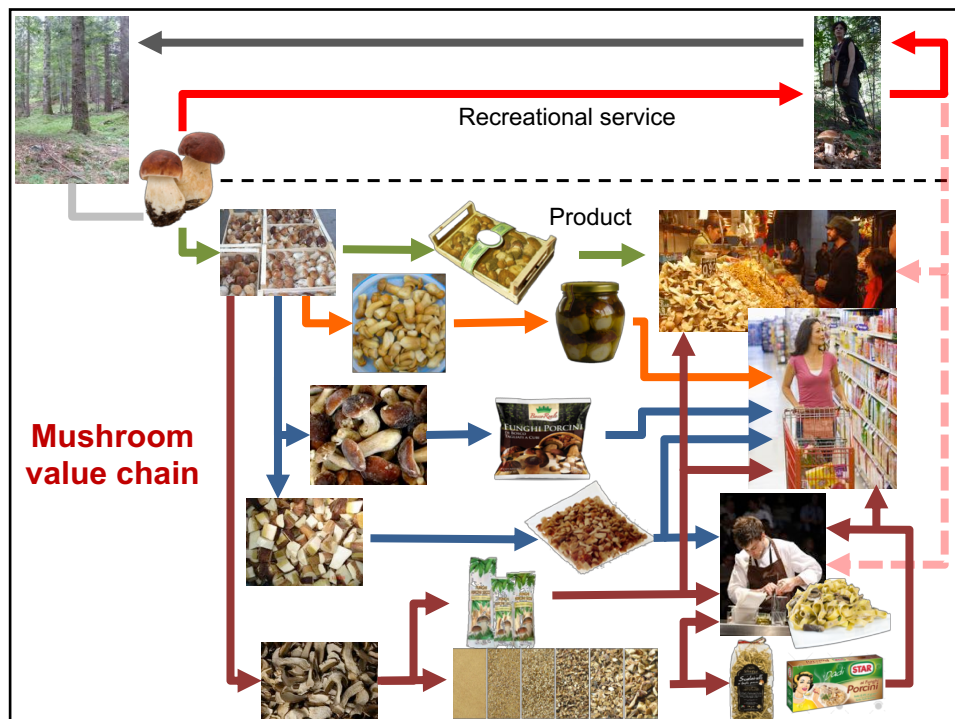


WFP

- Modern segment of an affluent society
- Aggressive attitude in marketing
- Definition based on positive attributes

WFP economic role

- NWFP in Europe: a market segment of the rural economy perceived as marginal and declining:
 - No clear definition
 - No data, also due to the complexity of the value chain

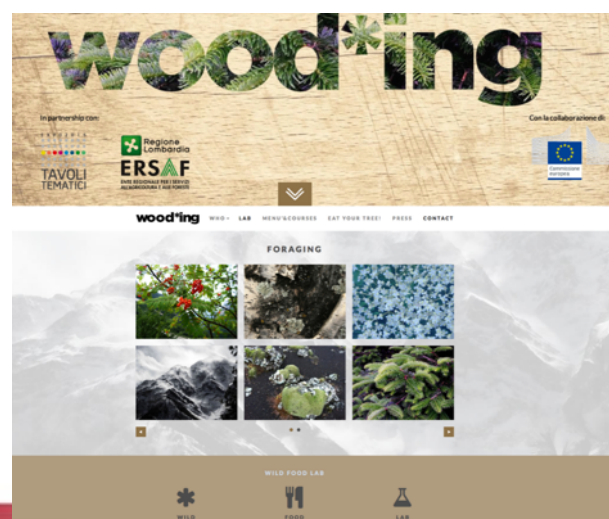


WFP economic role

- NWFP in Europe: a market segment of the rural economy perceived as marginal and declining:
 - No clear definition
 - No data, also due to the complexity of the value chain
 - No innovation
 - Informal (black) economy

Dynamic market conditions Some examples: *foraging*

<http://www.wood-ing.org/>



Sap water



TESAF Departamento Territorio
e Sistema Agro-Forestal



Resins

RESINAS[®]
NAVAS DE ORO

INICIO LA RESINA EMPRESA INSTALACIONES PRODUCTOS NOTICIAS



LA EMPRESA MEMORIA



RESINAS NAVAS DE ORO se crea con el fin de dar cobertura y viabilidad al momento actual (la demanda del mercado internacional ha creado nuevas oportunidades para el sector de la resinación) que se está viviendo en España, en especial en Castilla y León y poder facilitar con su creación el aprovechamiento y el desarrollo del sector de la industria de la resinación y destilación dentro de la región donde se produce.



<https://resinasnavasdeoro.es/>

TESAF Departamento Territorio
e Sistema Agro-Forestal



Many (new) links with tourism: micotourism in Castilla y León

<http://www.turismocastillayleon.com/es/gastronomia-enoturismo/micoturismo>





Territorio

THE TRAIL
MAP OF THE TRAIL
ITINERARI
TOWNS ALONG THE TRAIL
PARKS
MUSEUMS
TOURIST INFORMATION
FOTOGALLERY

FIRMS

Bed & Breakfast
Caseificio / Salumificio / A.Z. Vitivinicola
Farmhouse holidays
Fattoria Didattica
Hotel
Museo / Collezione privata
Restaurant
Sale of local products

Link

Fungo di Borgotaro
Meteo Apuane
Strada del Prosciutto
Emilia Romagna Turismo

Enterprises: 62 (in 2008); > 100 in 2011

- 15 Agritourisms/ Farm businesses
- 12 Hotels/Guest quarters
- 8 Bed&Breakfasts/Inns/Hostels
- 9 Cheese, sausage and wine growing and producing factories
- 2 Didactic farms
- 3 Museums/Private collections
- 30 Restaurants/Porterhouses
- 26 Typical products sellers





Road, trail, path... the tools for connecting different economic actors



Google search		hits
Strada della castagna	Chestnut road	35,200
Strada del tartufo	Truffle road	361,000
Strada del fungo	Mushroom road	265,000
Strada del porcino	Porcino road	58,900
Strada del marrone	Marron road	78,400



E-marketing

News > Cronaca > Il tartufo da 900 grammi a un magnate cinese per 330.000 dollari

La cifra record in beneficenza

Il tartufo da 900 grammi a un magnate cinese per 330.000 dollari



ultimo aggiornamento: 27 novembre, ore 18:42

Roma - (Adnkronos/In) - Stanley Ho si porta a casa il tartufo toscano più grande del 2010 e uno molisano da 350 grammi. Ha superato ogni offerta ma l'Italia "si è battuta bene". L'evento all'hotel Cavalieri Hilton in collegamento satellitare con Londra e Macao (FOTO). All'asta il tartufo più grande dell'anno. Divisi in Parlamento, uniti a tavola. Sul tartufo l'accordo è bipartisan



ISAF Dipartimento Territorio e Sistemi Agro-Forestali



Associazione Nazionale **Città del Castagno**

Sede legale e amm.: Castelnuevo di Garfagnana (LU)

L'Associazione Città del Castagno: **110 members**

In the Italian farming sector, chestnut is in the 5th position in terms of no. of local associations

Product	Number of Associations
Città del vino	524
dell'Olio	358
della Nocciola	225
del Bio	194
del Castagno	158
dei Sapori	114
delle Ciliegie	68
del Tartufo	62
del Miele	59
del Pane	42

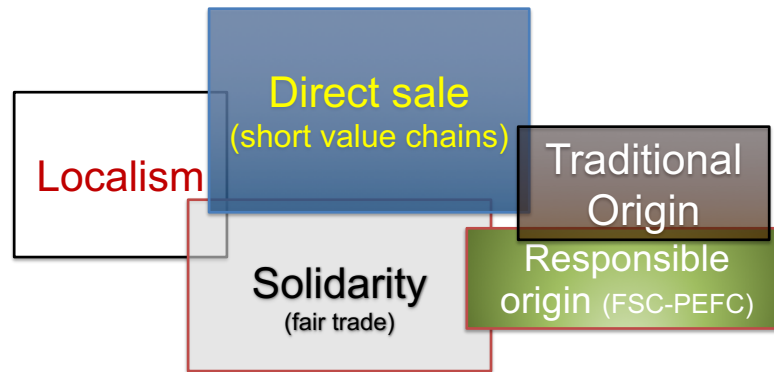
Source: Corriere della Sera (2015)

TESAF Dipartimento Territorio e Sistemi Agro-Forestali

New selling systems

- Direct sales: **“Pick-up your chestnuts”**: selling directly to the consumers the right to collect chestnut for a fixed rate or in relation to the weight of collected fruits
- **“Adopt your own chestnut tree”**: chestnuts picking and organised picnics under the chestnut tree
- **e-business**:
 - B2B: fresh chestnuts, semi-finished products, ...
 - B2C: jams, dried nuts,...

WFP for emerging segments of consumers:
LOHAS (Life Style Of Health and Sustainability)

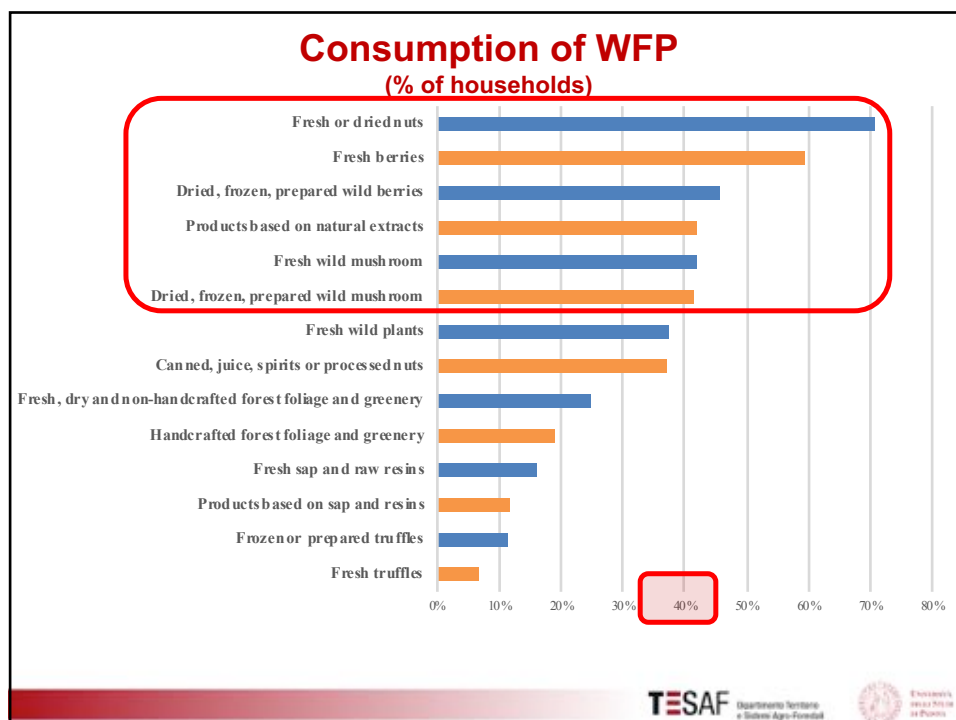
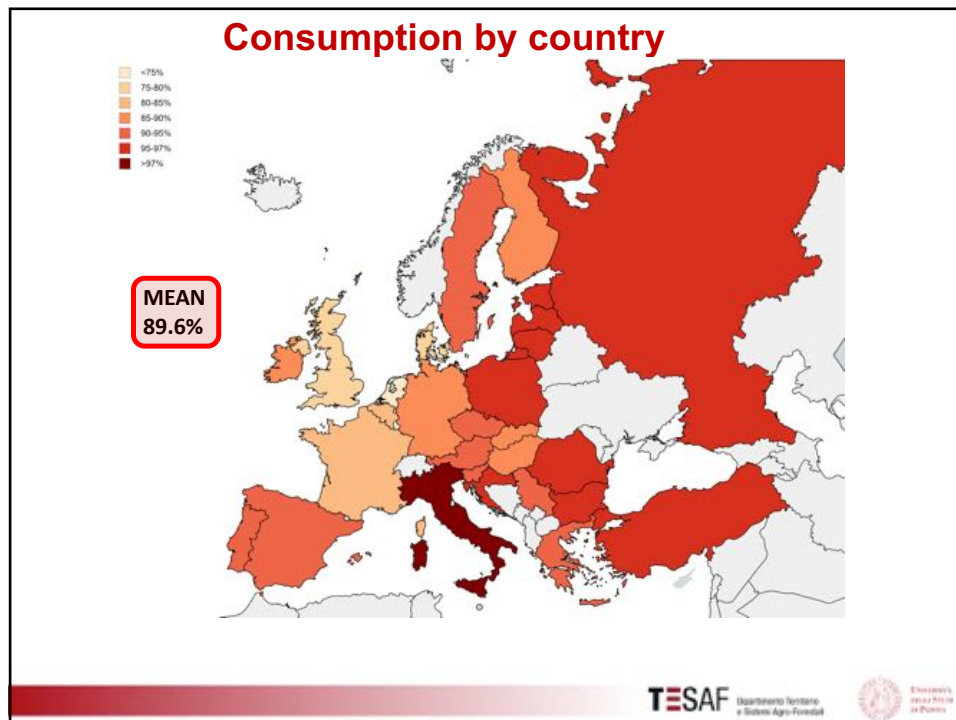


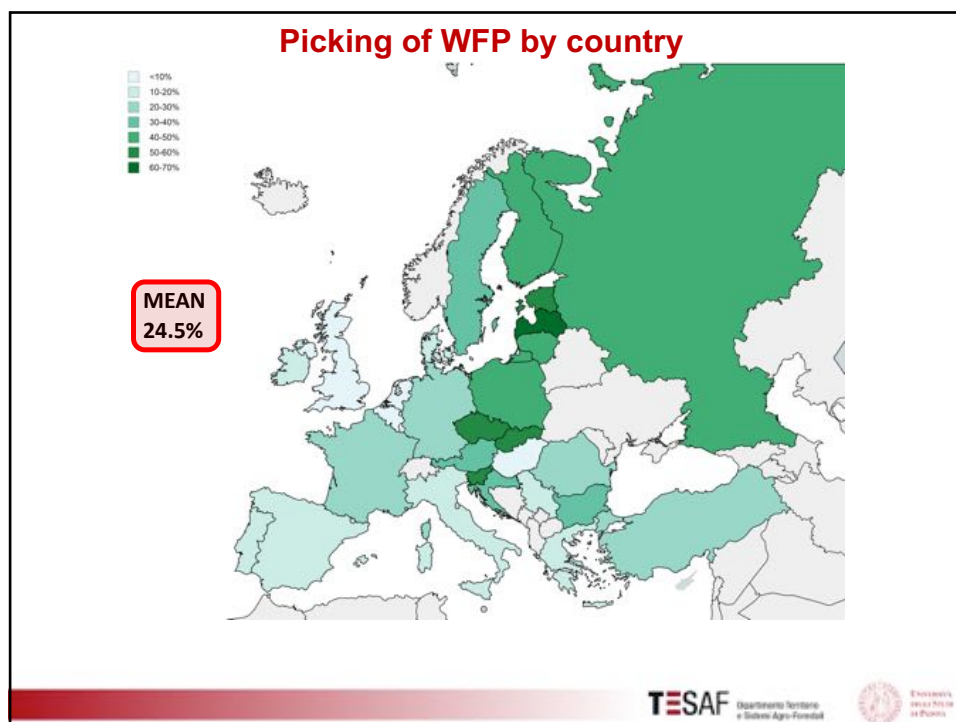
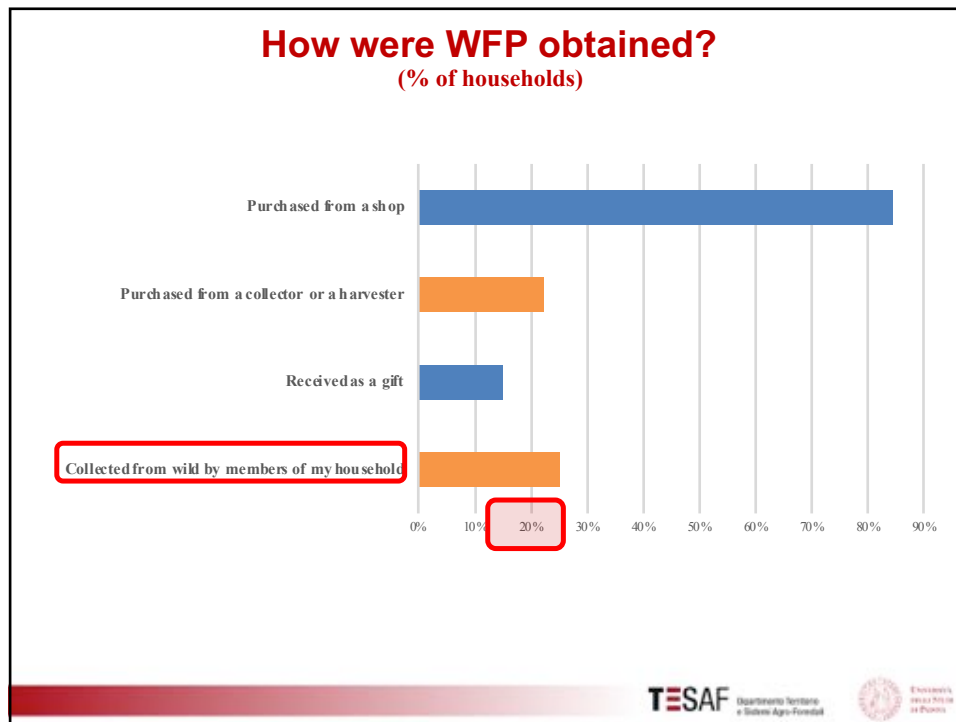
But how many?

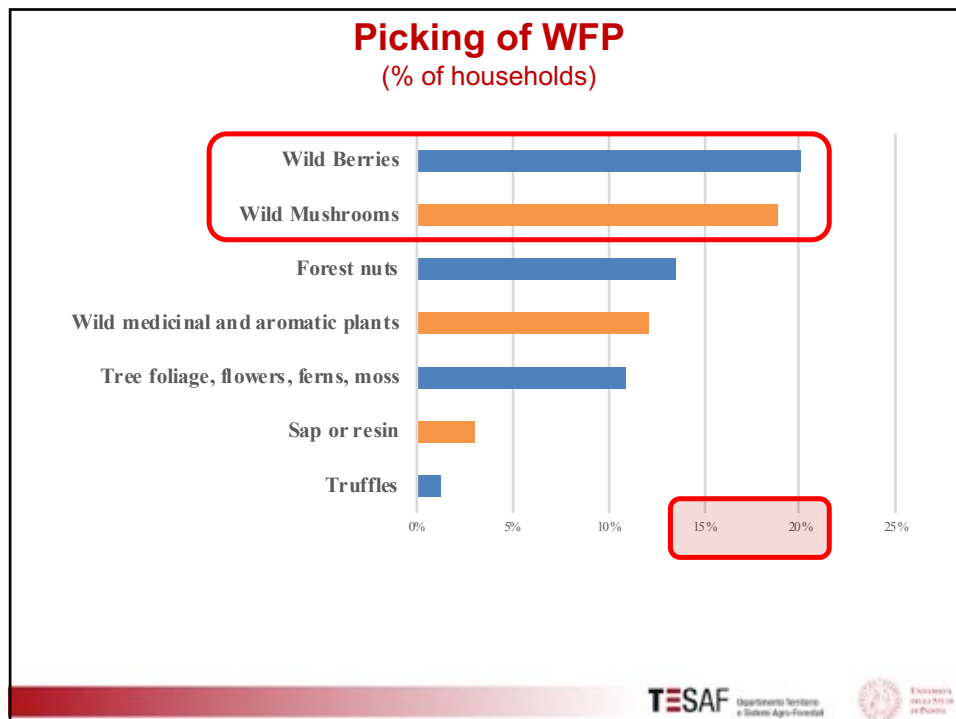
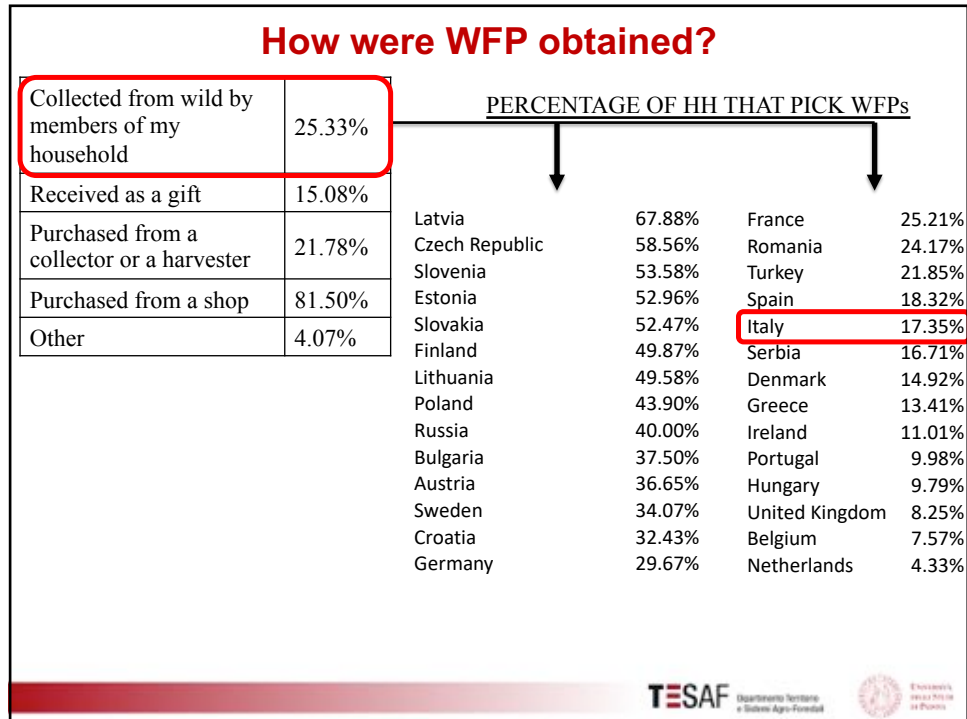
A survey carried out under the StarTree H2020 project

by DP, Giulia Corradini, Riccardo Da Re, Marko Lovrić and Enrico Vidale

- **Objective:** to assess the **consumption** and **collection** of WFPs in Europe
- **Design:**
 - Unit of analysis: household
 - **Scale: EU28** (no Malta, Luxembourg and Cyprus) with Serbia, Turkey and European part of Russian Federation
 - Panel study (distributed by a polling agency)
- **Sample:** respondents: **17,346** (95% confidence level, $\approx 4.21\%$ confidence interval).







Still a lot to do to make the sector vital and stable

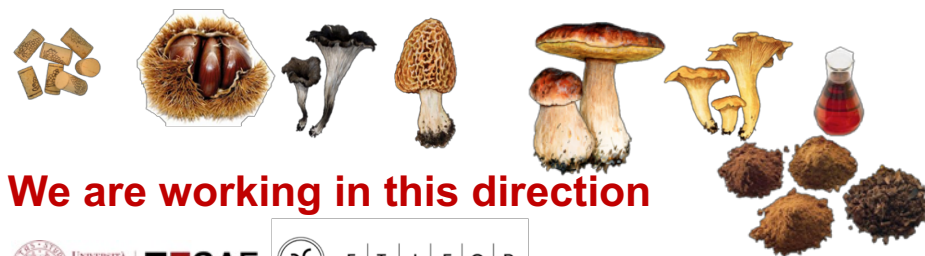
Monitoring
and assessment



R&S, dissemination
and communication

Creation of a fair, transparent and traceable market

TESAF Dipartimento Territorio
e Sistemi Agro-Forestali



We are working in this direction



UNIVERSITÀ
DEGLI STUDI
DI PADOVA

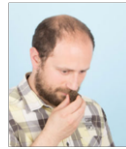
TESAF



E T I F O R



**Davide
Pettenella**



**Enrico
Vidale**



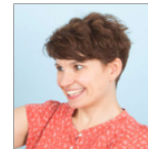
**Nicola
Andrighetto**



**Riccardo
Da Re**



**Giulia
Corradini**



**Arianna
Ruberto**



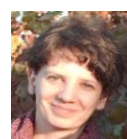
Laura Secco



Mauro Masiero



Paola Gatto



Elena Pisani



Diego Gallo



Lucio Brotto