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# Italy

**Post:** Rome

# Fresh Deciduous Fruit Annual 2012

**Report Categories:**

Fresh Deciduous Fruit

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**Report Highlights:**

MY 2012/13 Italian apple production is forecast to decrease by 13.3 percent compared to the previous year, due mainly to the freeze and heavy rains during the blooming time. MY 2012/13 pear production is forecast at 717,000 MT, a 22 percent shortfall over last season's supply. The decline is due to the severe drought of this summer that affected the main producing areas, strongly hindering the normal development of the fruit. Italy ranks 6th in world's table grape production and 3rd among table grape exporters, behind Chile and the United States. MY 2012/13 Italian table grape production is estimated to decrease slightly, because of the severe summer drought that negatively affected the growth of mid to late maturing varieties, thus reducing the size of the fruit.

Italy is the leading table grape consumer in the EU-27, followed by Germany, the United Kingdom, France, and Spain.

## I. APPLES

**Table 1: Production, Supply, and Demand (MT)**

| Apples | 2010 Estimates 2010/2011 Post Data | 2011 Estimates 2011/2012 Post Data | 2012 Forecast 2012/2013 Post Data |
|---|---|---|---|
| Area Planted | 57,907 | 58,968 | 58,950 |
| Area Harvested | 54,468 | 55,100 | 55,050 |
| Commercial Production | 2,179,000 | 2,293,000 | 1,987,000 |
| Production | 2,179,000 | 2,293,000 | 1,987,000 |
| Intra EU-27 Imports | 24,573 | 23,650 | 23,600 |
| Extra EU-27 Imports | 13,649 | 7,934 | 7,900 |
| Total Imports | 38,222 | 31,584 | 31,500 |
| **Total Supply** | **2,217,222** | **2,324,584** | **2,018,500** |
| Fresh Domestic Consumption | 1,164,579 | 1,041,067 | 857,300 |
| Intra EU-27 Exports | 748,756 | 675,762 | 675,000 |
| Extra EU-27 Exports | 213,887 | 286,735 | 287,500 |
| Total Exports | 962,643 | 962,497 | 962,500 |
| For processing | 90,000 | 321,020 | 198,700 |
| **Total Distribution** | **2,217,222** | **2,324,584** | **2,018,500** |

Source: Istat; Assomela; CSO (Italy's Fresh Produce Service Centre); GTA

### PRODUCTION

With about 2MMT, Italy provides around 20 percent of the EU-27 apple production. Trentino-South Tyrol covers 70 percent of apple production in Italy and 15 percent of the production in Europe. Veneto, Friuli Venezia Giulia, Piedmont, Emilia Romagna, Lombardia, and Campania are the main apple-producing areas. *Golden Delicious, Gala, Red Delicious, Fuji,* and *Granny Smith* represent the most widely planted varieties.

MY 2012/13 Italian apple production is forecast to decrease by 13.3 percent compared to the previous year, due mainly to the freeze and heavy rains during the blooming time. Remarkable decreases are forecast for *Red Delicious, Renetta, Gala*, and *Fuji* varieties. Fruit quality is in turn satisfying. In terms of price, the fall in European apple production (-9 percent ) should ensure a healthy balance between supply and demand, determining definately better prices compared to the ones registered in the last commercial campaign.

**Table 2: Italian apple production by region (MT)**

| | 2009 | 2010 | 2011 | 2012 (Forecast) | Var. 2012/2011 |
|---|---|---|---|---|---|
| Alto Adige | 1,157,524 | 1,064,638 | 1,180,991 | 998,406 | -15,5% |
| Trentino | 420,658 | 466,724 | 504,801 | 449,111 | -11% |
| Other regions | 659,096 | 648,253 | 606,970 | 545,394 | -10,1% |
| **Total** | **2,237,279** | **2,179,615** | **2,292,762** | **1,992,911** | **-13,1%** |

Source: Assomela; CSO

**Table 3: Italian apple production by variety (MT)**

| Apple Production by Variety | Estimates 2010/2011 | Estimates 2011/2012 | Forecast 2012/2013 |
|---|---|---|---|
| Golden Delicious | 947,000 | 1,021,000 | 910,000 |
| Gala | 302,000 | 318,000 | 278,000 |
| Red Delicious | 245,000 | 253,000 | 201,000 |
| Fuji | 163,000 | 164,000 | 146,000 |
| Granny Smith | 113,000 | 122,000 | 92,000 |
| Braeburn | 97,000 | 102,000 | 87,000 |
| Cripps Pink | 70,000 | 92,000 | 70,000 |
| Morgenduft/Imparatore | 81,000 | 61,000 | 63,000 |
| Annurca | 34,000 | 35,000 | 35,000 |
| Renette | 27,000 | 27,000 | 19,000 |
| Jonagold | 14,000 | 17,000 | 14,000 |
| Stayman R. e W. | 18,000 | 17,000 | 13,000 |
| Idared | 4,000 | 2,000 | 2,000 |
| Elstar | 1,000 | 1,000 | 1,000 |
| Gloster | 0 | 0 | 0 |
| Jonathan | 0 | 0 | 0 |
| Other | 62,000 | 60,000 | 62,000 |
| **Total** | **2,179,000** | **2,293,000** | **1,993,000** |

Source: Assomela; CSO

**Table 4: Farm Gate Prices (€/kg)**

| **Golden Delicious** | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **Month** | **JAN** | **FEB** | **MAR** | **APR** | **MAY** | **JUN** | **SEP** | **OCT** | **NOV** | **DIC** |
| **Year** | | | | | | | | | | |
| **2011** | 0,54 | 0,55 | 0,57 | 0,57 | 0,56 | 0,56 | 0,50 | 0,48 | 0,52 | 0,52 |
| **2012** | 0,52 | 0,53 | 0,50 | 0,51 | 0,54 | 0,56 | 0,59 | 0,59 | - | - |

Source: Datima

**CONSUMPTION**

Experts estimate that in MY 2012 around 10 percent (198,700 MT) of the Italian crop will be destined to the industry, while the remainder 90 percent (1,788,300 MT) will be suitable for domestic fresh consumption and export.

**TRADE**

Italy's apple exports have been constantly growing for 10 years, both in terms of quantities and reached destinations. MY 2011/12 Italian extra EU-27 apple exports regisitered a significant increase, especially to North Africa (Egypt, Libya, and Algeria) and Mid-East countries (United Arab Emirates, Saudi Arabia, and Kuwait). Germany, Chile, and France continue to be the main suppliers to the Italian apple market.

## II. PEARS

**Table 5: Production, Supply, and Demand (MT)**

| Pears | 2010 | 2011 | 2012 |
|---|---|---|---|
| | Estimates 2010/2011 | Estimates 2011/2012 | Forecast 2012/2013 |
| | Post Data | Post Data | Post Data |
| Area Planted | 40,233 | 39,428 | 39,000 |
| Area Harvested | 36,890 | 36,339 | 36,100 |
| Commercial Production | 680,000 | 915,000 | 717,000 |
| Production | 680,000 | 915,000 | 717,000 |
| Intra EU27 Imports | 59,088 | 31,202 | 31,100 |
| Extra EU27 Imports | 77,219 | 461 | 460 |
| Total Imports | 136,307 | 31,663 | 31,560 |
| **Total Supply** | **816,307** | **946,663** | **748,560** |
| Fresh Domestic Consumption | 623,363 | 729,839 | 563,410 |
| Intra EU27 Exports | 112,697 | 100,119 | 100,100 |
| Extra EU27 Exports | 10,247 | 13,310 | 13,350 |
| Total Exports | 122,944 | 113,429 | 113,450 |
| For processing | 70,000 | 103,395 | 71,700 |
| **Total Distribution** | **816,307** | **946,663** | **748,560** |

Source: Istat; CSO; GTA

**PRODUCTION**

Italy is the largest pear producer in the EU-27 and ranks third in the world after China and the United States. Approximately 33,498 hectares of pear orchards are cultivated in Italy, mainly located in the northeast. Emilia-Romagna (Ferrara, Modena, and Bologna) is the main producing area with almost 66 percent of Italy's total output. Pear planted area has been declining over the last decade due to lack of profitable investment opportunities. *Abate Fetel* is the dominant variety, followed by *William B.C.*, *Conference*, *Coscia, Kaiser*, *Decana, Passacrassana*, and *Guyot.* MY 2012/13 pear production is forecast at 717,000 MT, a 22 percent shortfall over last season's supply. The decline is due to the severe drought of this summer that affected the main producing areas, strongly hindering the normal development of the fruit. The *Abate* variety registered a decrease of 45 percent compared to MY 2011/12, while *Williams* and *Conference* drop by 30 and 35-40 percent respectively. Size of the fruit is smaller than expected, but quality is very good from the gustatory and organoleptic point of view.

**Table 6: Farm Gate Prices (€/Kg)**

| **CONFERENCE** | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Month** | **JAN** | **FEB** | **MAR** | **APR** | **MAY** | **JUN** | **AGO** | **SEP** | **OCT** | **NOV** | **DIC** |
| **Year** | | | | | | | | | | | | |
| **2011** | 0,80 | 0,83 | 0,84 | 0,83 | 0,76 | 0,60 | 0,37 | 0,38 | 0,50 | 0,52 | 0,52 |
| **2012** | 0,50 | 0,53 | 0,56 | 0,58 | 0,66 | 0,55 | 0,52 | 0,53 | 0,73 | - | - |

| **ABATE FETEL** | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| **Month** | **JAN** | **FEB** | **MAR** | **AUG** | **SEP** | **OCT** | **NOV** | **DIC** |
| **Year** | | | | | | | | |
| **2011** | 1,10 | 1,11 | 1,04 | 0,49 | 0,57 | 0,65 | 0,62 | 0,57 |
| **2012** | 0,53 | 0,48 | 0,51 | 0,68 | 0,82 | 0,94 | - | - |

| **WILLIAMS** | | | |
|---|---|---|---|
| **Month** | **AUG** | **SEP** | **OCT** |
| **Year** | | | |
| **2011** | 0,45 | 0,60 | 0,61 |
| **2012** | 0,50 | 0,75 | 0,79 |

Source: Datima

**Table 7: Italian pear production by variety (MT)**

| Pear Production by Variety | Estimates 2010/2011 | Estimates 2011/2012 | Forecast 2012/2013 |
|---|---|---|---|
| Abate Fetel | 220,000 | 378,000 | 279,000 |
| William B.C. | 156,000 | 185,000 | 152,000 |
| Conference | 93,000 | 112,000 | 88,000 |
| Coscia | 53,000 | 54,000 | 48,000 |
| Kaiser | 39,000 | 57,000 | 38,000 |
| Decana del C. | 38,000 | 39,000 | 33,000 |
| Passacrassana | 5,000 | 6,000 | 5,000 |
| Guyat | 2,000 | 2,000 | 2,000 |
| Altre | 74,000 | 80,000 | 73,000 |
| **Total** | **680,000** | **915,000** | **717,000** |

Source: CSO

## CONSUMPTION

Italy consumes most of its domestic production, exporting less than 16 percent.

## TRADE

MY 2011/12 Italian pear imports reached 31,663 MT, a decline of 77 percent compared to the previous campaign. Italy imports the majority of its pears from Spain, accounting for 72 percent of the total. Follow France and the Netherlands. Germany and France continue to be the main destinations for Italian pears, accounting for 40 and 15 percent respectively.

# III. TABLE GRAPES

**Table 8: Production, Supply, and Demand (MT)**

| Table grapes | 2010 | 2011 | 2012 |
|---|---|---|---|
| | Estimates 2010/2011 | Estimates 2011/2012 | Forecast 2012/2013 |
| | Post Data | Post Data | Post Data |
| Area Planted | 68,232 | 68,100 | 68,030 |
| Area Harvested | 65,583 | 65,900 | 65,820 |
| Commercial Production | 1,361,000 | 1,343,000 | 1,275,850 |
| Production | 1,361,000 | 1,343,000 | 1,275,850 |
| Intra EU27 Imports | 10,941 | 16,129 | 16,150 |

| | | | |
|---|---|---|---|
| Extra EU27 Imports | 9,818 | 8,827 | 8,810 |
| Total Imports | 20,759 | 24,956 | 24,960 |
| **Total Supply** | **1,381,759** | **1,367,956** | **1,300,810** |
| Fresh Domestic Consumption | 898,857 | 869,725 | 802,575 |
| Intra EU27 Exports | 427,889 | 443,538 | 443,600 |
| Extra EU27 Exports | 55,013 | 54,693 | 54,635 |
| Total Exports | 482,902 | 498,231 | 498,235 |
| **Total Distribution** | **1,381,759** | **1,367,956** | **1,300,810** |

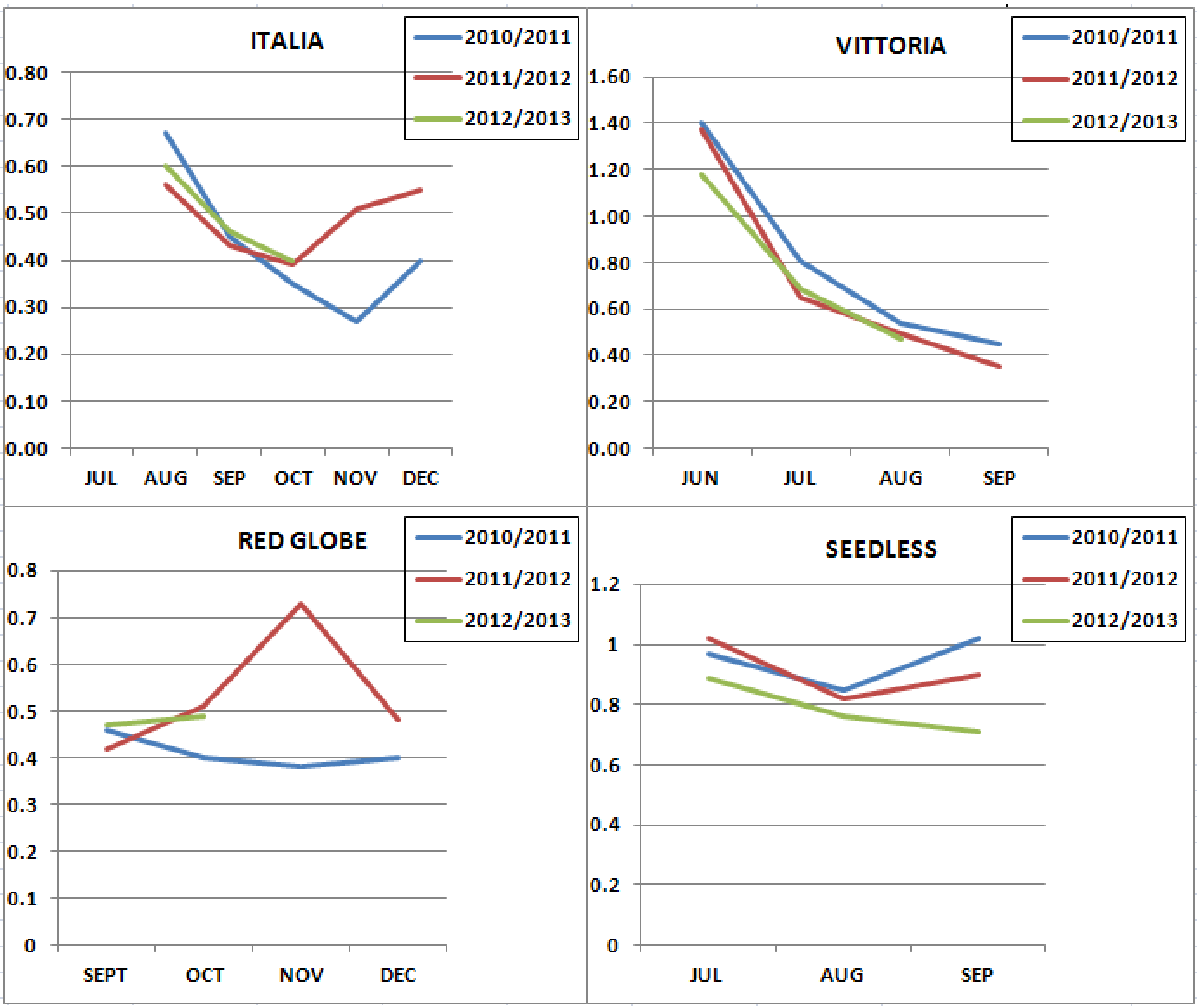
Source: ISTAT; GTA

**PRODUCTION**

Italy ranks 6th in world's table grape production and 3rd among table grape exporters, behind Chile and the United States. Italian table grape production is concentrated in Southern Italy, mainly in Apulia and Sicily, which account for 75 and 25 percent of the domestic production, respectively. *Italia*, *Victoria*, and *Red Globe* are the main varieties in Italy, covering about 66 percent of the table grape area. In the last few years, Italy has gradually moved to seedless grapes cultivation, to an increasing demand from intra and extra EU markets. *Sugraone* and *Crimson* are the most popular seedless varieties followed by *Thompson*, *Centennial*, and *Sublime*.

MY 2012/13 Italian table grape production is estimated to decrease slightly, because of the severe summer drought that negatively affected the growth of mid to late maturing varieties, thus reducing the size of the fruit. However, the heat had a beneficial effect on the sugar content of the grapes, which is forecast to be particularly high. Early varieties (*Victoria* and *Black Magic*) from Sicily are reported to have excellent quality, colour, and sugar content. Early varieties are sold at higher prices from May to the end of July. They are grown using the overhead table grape vineyard system ("tendone" training system): polyethylene sheets are draped over the vines in spring to accelerate fruit growth through a greenhouse effect. For medium and late varieties (*Italia*, *Palieri*, *Pizzutello Bianca*, and *Red Globe)* - from Sicily, Abruzzo, Apulia, Basilicata, and Sardinia - the harvest occurs from August to December.

**Table 9: Average farm gate prices table grapes in Italy (Euro/kg)**




Source: ISMEA, Agricultural Marketing Center

## CONSUMPTION

Italy is the leading table grape consumer in the EU-27, followed by Germany, the United Kingdom, France, and Spain. Despite the fact that Italian seeded grapes are still appreciated, experts claim that seedless varieties are increasingly being demanded by EU-27 consumers. Thus, many EU-27 table grapes farmers are replacing old seeded varieties with new seedless ones.

## TRADE

Germany, France, and Poland continue to be the main destinations for Italian table grapes. Spain, the Netherlands, Chile, Egypt, and Peru are the main suppliers to the Italian table grape market.

**Table 10: Italian exports of table grapes (MT)**

| Partner Country | Quantity | | |
|---|---|---|---|
| | 2010 | 2011 | 2012 |
| **World** | **397,960** | **482,902** | **498,231** |
| Germany | 98,447 | 114,707 | 116,793 |
| France | 56,178 | 92,021 | 96,982 |
| Poland | 38,478 | 53,931 | 56,586 |
| Spain | 24,228 | 23,387 | 27,521 |
| Czech Republic | 22,351 | 22,253 | 24,998 |
| Switzerland | 21,980 | 22,872 | 22,880 |
| Belgium | 15,639 | 16,520 | 18,106 |
| Romania | 11,969 | 13,374 | 15,130 |
| Netherlands | 19,485 | 13,162 | 14,354 |
| Austria | 10,340 | 12,841 | 12,401 |
| Russia | 8,334 | 13,941 | 12,208 |
| United Kingdom | 8,018 | 10,433 | 10,510 |
| Hungary | 5,987 | 9,670 | 9,960 |
| Slovakia | 6,346 | 7,756 | 8,040 |
| Denmark | 6,742 | 6,060 | 6,827 |
| Lithuania | 6,664 | 9,243 | 6,754 |
| Norway | 8,189 | 6,062 | 6,218 |
| Slovenia | 6,692 | 6,465 | 5,210 |
| Sweden | 2,705 | 4,457 | 4,963 |
| Latvia | 1,631 | 2,353 | 2,612 |

Source: GTA

**Table 11: Italian imports of table grapes (MT)**

| Partner Country | Quantity | | |
|---|---|---|---|
| | **2010** | **2011** | **2012** |
| **World** | **22,464** | **20,759** | **24,956** |
| Spain | 4,218 | 5,049 | 7,089 |
| Netherlands | 2,729 | 3,140 | 4,241 |
| Chile | 4,102 | 4,909 | 2,882 |
| Egypt | 3,415 | 2,254 | 2,628 |
| Peru | 263 | 651 | 1,296 |
| France | 2,031 | 1,075 | 1,284 |
| South Africa | 1,722 | 908 | 961 |
| Greece | 552 | 414 | 956 |
| Germany | 420 | 696 | 919 |
| Bulgaria | - | 19 | 911 |

**Abbreviations and definitions used in this report:**

EU European Union
MS EU-27 Member State
Ha hectare; 1 ha = 2.471 acres
MT Metric ton = 1000 kg
MMT Million metric tons

**MY Marketing year**
Apples: July/June
Pears: July/June
Table Grapes: June/May

**HS Codes:**
Apples: 080810
Pears: 080820
Table grapes: 08061010