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Fresh Deciduous Fruit Annual 2016

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Fresh Deciduous Fruit

Approved By:

Fred Giles

Prepared By:

Ornella Bettini

Report Highlights:

With approximately 2.3 million metric tons (MMT), Italy provides almost 20 percent of the EU-28 apple production. Italy's MY 2016/17 apple production is forecast to remain flat compared to the previous campaign. Italy is the largest EU-28 pear producer. Its MY 2016/17 pear production is forecast at 678,000 MT, an 11 percent drop from the previous campaign (764,000 MT) due to temperatures below average from spring to mid-June. Italy is also the leading table grape producer in the EU-28, followed by Greece and Spain. MY 2016/17 table grape production is forecast to decrease by 4.3 percent due to adverse weather during fruit set. Fruit quality is expected to be very good.

General Information:
ITALY

I. APPLES

Table 1: Area (Hectares), Supply and Distribution (Metric Tons)

Apples	**2014**	**2015**	**2016**
	Estimates 2014/2015	**Estimates 2015/2016**	**Forecast 2016/2017**
	Post Data	**Post Data**	**Post Data**
Area Planted	54,743	54,720	54,718
Area Harvested	52,000	51,639	51,636
Commercial Production	2,456,215	2,279,808	2,281,814
Production	2,456,215	2,279,808	2,281,814
Intra EU-28 Imports	34,173	43,644	43,640
Extra EU-28 Imports	6,898	5,019	5,015
Total Imports	41,071	48,663	48,655
Total Supply	**2,497,286**	**2,328,471**	**2,330,469**
Fresh Domestic Consumption	1,077,016	1,012,161	1,054,298
Intra EU-28 Exports	679,547	645,479	646,000
Extra EU-28 Exports	438,252	400,169	400,171
Total Exports	1,117,799	1,045,648	1,046,171
For processing	302,471	270,662	230,000
Total Distribution	**2,497,286**	**2,328,471**	**2,330,469**

Sources: Istat (Italian Institute of Statistics); Assomela/CSO (Italy's Fresh Produce Service Centre); GTA (Global Trade Atlas)

PRODUCTION

With approximately 2.3 million metric tons (MMT), Italy provides almost 20 percent of the EU-28 apple production. Trentino-South Tyrol covers 70 percent of Italian apple production and 15 percent of European production. The remainder of production is in the regions of Veneto, Friuli-Venezia Giulia, Piemonte, Emilia Romagna, Lombardia, and Campania. *Golden Delicious*, *Gala*, *Red Delicious*, *Fuji*, and *Granny Smith* represent the most widely planted varieties. Italy's MY 2016/17 apple production is forecast to remain flat compared to the previous campaign. Production decreases of 3 percent in Alto Adige and Trentino are forecast to be offset by the increased supply in Veneto (+8 percent compared to MY 2015/16). Reduced quantities of *Granny Smith* (- 10 percent), *Golden Delicious* (- 4 percent), *Fuji* (- 3 percent), and *Red Delicious* (- 2 percent) varieties are expected to be offset by remarkable growth for *Imperatore* (+44 percent), *Cripps Pink* (+18 percent), and *Gala* (+3 percent). Overall, fruit size is forecast to be average with excellent quality, thanks to favorable weather conditions during fruit set.

Table 2: Italian apple production by region (MT)

Region	2014	2015	2016	Var. % 2016/2015
Alto Adige	1,199,224	1,127,227	1,096,717	-3
Trentino	559,608	535,899	521,583	-3
Other regions	697,383	616,682	663,514	8
Total	**2,456,215**	**2,279,808**	**2,281,814**	**0,09**

Sources: Assomela; CSO

Table 3: Italian apple production by variety (MT)

Apple Variety	2014	2015	2016	Var. % 2016/2015
Golden Delicious	1,035,605	945,806	907,411	-4
Red Delicious	268,084	255,412	250,580	-2
Imperatore	74,431	45,766	65,983	44
Stayman	14,049	14,039	13,857	-1
Gala	327,791	329,640	339,461	3
Granny	173,701	175,980	158,285	-10
Gloster	69	83	0	-100
Elstar	378	281	0	-100
Annurca	40,000	35,000	35,000	0
Renette	33,953	29,149	27,680	-5
Jonagold	9,475	9,855	8,319	-16
Jonathan	27	18	0	-100
Braeburn	90,735	78,664	82,743	5
Idared	1,118	1,746	887	-49
Fuji	199,510	186,869	181,142	-3
Cripps Pink	104,189	85,797	101,617	18
Other	83,100	85,704	108,849	27
Total	**2,456,215**	**2,279,808**	**2,281,814**	**0,09**

Sources: Assomela; CSO

CONSUMPTION

According to the latest industry forecast, approximately 90 percent of Italian apple supply will be suitable for domestic fresh consumption and export in MY 2016/17, while the remainder will be destined to the industry.

TRADE

Italy exported 1,045,648 MT of apples in MY 2015/16, mainly to Germany, Egypt, and Spain, accounting for 27, 12, and 8 percent of total exports, respectively. In MY 2015/16, Italy imported 48,663 MT of apples, mainly from France, Poland, Slovakia, and Austria, accounting for 19, 11, 10, and 9 percent of total imports, respectively.

Table 4: Italy's leading apple exports

Partner Country	Unit	Quantity			% Share			% Change 2016/2015
		2014	2015	2016	2014	2015	2016	
World	T	873,595	1,117,799	1,045,648	100.00	100.00	100.00	- 6.45
EU-28	T	593,614	679,547	645,479	67.95	60.79	61.73	- 5.01
Germany	T	306,819	290,297	284,568	35.12	25.97	27.21	- 1.97
Egypt	T	50,390	116,612	129,667	5.77	10.43	12.40	11.19
Spain	T	65,172	81,866	88,216	7.46	7.32	8.44	7.76
Saudi Arabia	T	22,924	40,643	51,959	2.62	3.64	4.97	27.84
Sweden	T	26,346	37,233	35,058	3.02	3.33	3.35	- 5.84
Algeria	T	38,566	67,658	31,366	4.41	6.05	3.00	- 53.64
Jordan	T	10,551	25,104	30,828	1.21	2.25	2.95	22.80
Libya	T	53,179	47,391	29,463	6.09	4.24	2.82	- 37.83
France	T	19,957	29,024	28,765	2.28	2.60	2.75	- 0.89
United Kingdom	T	26,179	33,135	28,218	3.00	2.96	2.70	- 14.84
Norway	T	23,100	27,857	26,362	2.64	2.49	2.52	- 5.37
Romania	T	12,035	21,483	24,649	1.38	1.92	2.36	14.74
Netherlands	T	23,892	21,003	22,146	2.73	1.88	2.12	5.44
United Arab Emirates	T	9,306	23,882	21,442	1.07	2.14	2.05	- 10.22
Denmark	T	20,159	20,942	19,558	2.31	1.87	1.87	- 6.61

Source: Global Trade Atlas (GTA)

Table 5: Italy's leading apple imports

Partner Country	Unit	Quantity			% Share			% Change 2016/2015
		2014	2015	2016	2014	2015	2016	
World	T	42,337	41,071	48,663	100.00	100.00	100.00	18.49
EU-28	T	34,295	34,173	43,644	81.00	83.21	89.69	27.71
France	T	7,217	6,683	9,512	17.05	16.27	19.55	42.34
Poland	T	1,850	1,947	5,538	4.37	4.74	11.38	184.52
Slovakia	T	2,801	4,574	4,888	6.62	11.14	10.04	6.87
Austria	T	2,668	2,360	4,214	6.30	5.75	8.66	78.55
Czech Republic	T	121	4,611	4,051	0.29	11.23	8.32	- 12.15
Germany	T	3,761	5,959	3,134	8.88	14.51	6.44	- 47.41
Croatia	T	4,012	394	2,906	9.48	0.96	5.97	636.84
Chile	T	5,054	3,894	2,845	11.94	9.48	5.85	- 26.93
Slovenia	T	1,948	691	2,409	4.60	1.68	4.95	248.51
United Kingdom	T	0	165	2,304	0.00	0.40	4.74	1293.13
Hungary	T	2,929	2,859	1,275	6.92	6.96	2.62	- 55.40
Spain	T	1,667	1,056	1,242	3.94	2.57	2.55	17.60

Belgium	T	546	203	1,094	1.29	0.49	2.25	439.48
Netherlands	T	1,914	1,282	717	4.52	3.12	1.47	- 44.06
Uruguay	T	357	798	589	0.84	1.94	1.21	- 26.22

Source: GTA

II. PEARS

Table 6: Area (Hectares), Supply and Distribution (Metric Tons)

Pears	2014	2015	2016
	Estimates 2014/2015	**Estimates 2015/2016**	**Forecast 2016/2017**
	Post Data	**Post Data**	**Post Data**
Area Planted	32,463	32,323	32,323
Area Harvested	29,938	30,533	29,450
Commercial Production	736,000	764,000	678,000
Production	736,000	764,000	678,000
Intra EU-28 Imports	46,866	37,246	47,000
Extra EU-28 Imports	51,784	50,717	51,800
Total Imports	98,650	87,963	98,800
Total Supply	**834,650**	**851,963**	**776,800**
Fresh Domestic Consumption	595,558	611,977	573,000
Intra EU-28 Exports	144,379	141,537	125,200
Extra EU-28 Exports	21,113	14,409	10,800
Total Exports	165,492	155,946	136,000
For processing	73,600	84,040	67,800
Total Distribution	**834,650**	**851,963**	**776,800**

Sources: Istat; CSO; GTA

PRODUCTION

Italy is the largest EU-28 pear producer. Approximately 32,323 hectares of pear orchards are cultivated on the Italian peninsula, mainly in the Northeast. Emilia-Romagna (Ferrara, Modena, and Bologna) is the main pear producing area covering almost 70 percent of Italy's total output.
Abate Fetel is the dominant variety, followed by *William B.C.*, *Conference*, *Kaiser*, *Coscia-Ercollini*, and *Doyenne du Comice*. Italy's MY 2016/17 pear production is forecast at 678,000 MT, an 11 percent drop from the previous campaign (764,000 MT) due to temperatures below average from spring to mid-June. Pear production in Emilia-Romagna is forecast at 448,000 MT, 13 percent less than 2014/15 and 12 percent lower than the 2011-2014 average. Production decreases are forecast for *Santa Maria* (-25 percent), *Kaiser* (-19 percent), *Decana* (-17 percent), *Abate Fetel* (-14 percent), *Conference* (-13 percent), and W*illiam BC* (-11 percent) varieties. However, fruit quality is expected to be high, with satisfactory calibers and sugar content.

Table 7: Italian pear production by variety (MT)

Pear Variety	2014	2015	2016	Var. % 2016/2015
Abate Fetel	355,000	330,000	287,000	-13
Conference	61,000	70,000	62,000	-11
Coscia-Ercollini	33,000	38,000	32,000	-16
Doyenne du Comice	19,000	23,000	20,000	-16
Guyot	2,000	2,000	2,000	-18
Kaiser	33,000	45,000	37,000	-17
Passacrassana	4,000	4,000	3,000	-12
William BC	158,000	170,000	156,000	-8
Other	71,000	83,000	80,000	-4

Source: CSO

CONSUMPTION

According to the latest industry forecast, approximately 90 percent of the Italian pear supply will be suitable for domestic fresh consumption and export in MY 2016/17, while the remainder will be destined to the industry.

TRADE

Italy exported 155,946 MT of pears in MY 2015/16, mainly to Germany, France, and Romania, accounting for 42, 14, and 8 percent of total exports, respectively. Italy's MY 2015/16 pear imports reached 87,963 MT, mainly from Argentina, Spain, and Chile, accounting for 32, 21, and 16 percent of total imports, respectively.

Table 8: Italy's leading pear exports

Partner Country	Unit	Quantity			% Share			% Change 2016/2015
		2014	2015	2016	2014	2015	2016	
World	T	146,643	165,492	155,946	100.00	100.00	100.00	- 5.77
EU-28	T	127,079	144,379	141,537	86.66	87.24	90.76	- 1.97
Germany	T	64,024	66,983	64,998	43.66	40.48	41.68	- 2.96
France	T	18,500	20,395	21,639	12.62	12.32	13.88	6.10
Romania	T	5,972	10,854	12,158	4.07	6.56	7.80	12.01
Austria	T	7,610	9,826	10,118	5.19	5.94	6.49	2.98
Libya	T	11,153	11,464	6,348	7.61	6.93	4.07	- 44.63
United Kingdom	T	6,436	5,120	5,459	4.39	3.09	3.50	6.63
Croatia	T	2,913	4,619	3,790	1.99	2.79	2.43	- 17.94
Hungary	T	3,239	4,396	3,596	2.21	2.66	2.31	- 18.19
Slovenia	T	2,645	3,903	3,525	1.80	2.36	2.26	- 9.68
Switzerland	T	2,105	1,929	3,023	1.44	1.17	1.94	56.67
Greece	T	1,737	2,878	2,556	1.18	1.74	1.64	- 11.21

Poland	T	1,371	1,870	2,111	0.93	1.13	1.35	12.86
Slovakia	T	1,698	2,464	1,982	1.16	1.49	1.27	- 19.56
Netherlands	T	2,726	1,502	1,678	1.86	0.91	1.08	11.67
Sweden	T	1,908	1,545	1,282	1.30	0.93	0.82	- 17.04

Source: GTA

Table 9: Italy's leading pear imports

Partner Country	Unit	Quantity			% Share			% Change 2016/2015
		2014	2015	2016	2014	2015	2016	
World	T	102,318	98,650	87,963	100.00	100.00	100.00	- 10.83
EU-28	T	45,173	46,866	37,246	44.15	47.51	42.34	- 20.53
Argentina	T	36,468	24,998	28,519	35.64	25.34	32.42	14.09
Spain	T	28,283	27,061	18,382	27.64	27.43	20.90	- 32.07
Chile	T	11,007	16,715	13,836	10.76	16.94	15.73	- 17.22
South Africa	T	7,920	8,193	7,471	7.74	8.30	8.49	- 8.81
France	T	6,122	4,584	7,094	5.98	4.65	8.07	54.77
Netherlands	T	4,839	9,773	6,994	4.73	9.91	7.95	- 28.43
Belgium	T	1,299	1,592	3,036	1.27	1.61	3.45	90.69
Portugal	T	3,673	3,237	1,021	3.59	3.28	1.16	- 68.46
China	T	518	565	602	0.51	0.57	0.68	6.58
Uruguay	T	1,172	1,314	285	1.15	1.33	0.32	- 78.29
Germany	T	720	514	279	0.70	0.52	0.32	- 45.74
Austria	T	72	94	125	0.07	0.10	0.14	32.51
Slovenia	T	11	3	121	0.01	0.00	0.14	3652.55
Hungary	T	63	0	88	0.06	0.00	0.10	0.00
Poland	T	0	0	66	0.00	0.00	0.07	0.00

Source: GTA

III. TABLE GRAPES

Table 10: Production, Supply, and Demand (MT)

Table grapes	2014	2015	2016
	Estimates 2014/2015	Estimates 2015/2016	Forecast 2016/2017
	Post Data	Post Data	Post Data
Area Planted	46,638	45,343	45,100
Area Harvested	44,508	44,346	44,108
Production	998,627	1,044,607	1,000,000
Intra EU-28 Imports	14,330	18,218	19,000
Extra EU-28 Imports	7,688	6,528	4,000
Total Imports	22,018	24,746	23,000
Total Supply	**1,020,645**	**1,069,353**	**1,023,000**

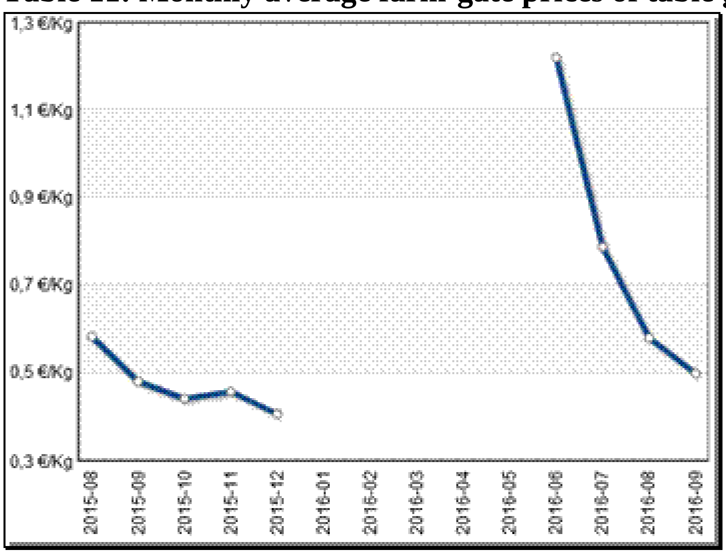
Fresh Domestic Consumption	562,202	601,389	580,500
Intra EU-28 Exports	407,296	423,971	410,000
Extra EU-28 Exports	41,847	43,493	32,000
Total Exports	449,143	467,464	442,000
Withdrawal from market	9,300	500	500
Total Distribution	**1,020,645**	**1,069,353**	**1,023,000**

Sources: ISTAT; Industry contacts; GTA

PRODUCTION

Italy is the leading table grape producer in the EU-28, followed by Greece and Spain. MY 2016/17 table grape production is forecast to decrease by 4.3 percent because of adverse weather during fruit set. Fruit quality is expected to be very good. Table grape production is concentrated in Southern Italy, mainly in Puglia and Sicilia, which account for 70 and 25 percent of the domestic production, respectively. *Italia*, *Victoria*, and *Red Globe* are the main varieties, covering approximately 66 percent of the table grape area. In the last few years, Italy has gradually moved to seedless grape cultivation due to an increasing demand from intra and extra EU markets. *Sugraone* and *Crimson* are the most popular seedless varieties, followed by *Thompson* and *Sublime*. However, table grape planted area has been declining over the last four years due to lack of profitable investment opportunities. Early varieties (*Black Magic* and *Vittoria*) are sold from May to the end of July. For medium and late varieties (*Italia*, *Palieri*, *Pizzutello Bianca*, and *Red Globe*) —mainly from Sicilia, Abruzzo, Puglia, Basilicata, and Sardegna—the harvest occurs from August to December.

Table 11: Monthly average farm-gate prices of table grapes in Italy (Euro/kg)



Source: ISMEA, Agricultural Marketing Center

CONSUMPTION

Italy is the leading table grape consumer in the EU-28, followed by Germany, the United Kingdom, Greece, France, Spain, Romania, Czech Republic, Portugal, Austria, Bulgaria, Slovakia, Croatia, and Slovenia. Despite the fact that Italian seeded grapes are still greatly appreciated, experts claim that EU-28 consumers are increasingly demanding seedless varieties because of their quality and convenience. Thus, many EU-28 table grape farmers are replacing old seeded varieties with new seedless ones (i.e. *Sugraone, Crimson, Thompson, Regal, Summer Royal, Centennial, Sublime,* etc.). Moreover, a greater focus is now being placed on late varieties (i.e. *Crystal* and *Princess*), in order to make European grapes available after the busy summer fruit season.

TRADE

In MY 2015/16, Italy exported 467,464 MT of table grapes, mainly to Germany (124,748 MT), France (98,585 MT), and Poland (43,523 MT), accounting for 27, 21, and 9 percent of total exports, respectively. Germany, Poland, and the Baltic States prefer the bigger Apulian grapes, while France favors the smaller Sicilian variety. Furthermore, new strategic markets are represented by Northern Europe, Middle East, and North Africa. As a consequence of the Russian ban, approximately 500 MT of Italian table grapes were withdrawn from the market and mainly donated to charity in MY 2015/16. However, seedless varieties (i.e. *Sugar Crisp*, *Sweet Sunshine*, *Sweet Celebration*, *Sweet Sapphire*, *Jack's Salute*, *Cotton Candy*) were not heavily affected by the Russian embargo as they are mainly sent to the United Kingdom, Scandinavian countries, and the United Arab Emirates. In MY 2015/16, Italy imported 24,746 MT of table grapes, mainly from Spain (6,022 MT), the Netherlands (5,858 MT), and Egypt (3,517 MT), accounting for 24, 24, and 14 percent of total imports, respectively.

Table 12: Italy's leading table grape exports

Partner Country	Unit	Quantity			% Share			% Change 2016/2015
		2014	2015	2016	2014	2015	2016	
World	T	512,728	449,143	467,464	100.00	100.00	100.00	4.08
EU-28	T	449,946	407,296	423,971	87.76	90.68	90.70	4.09
Germany	T	117,224	103,104	124,748	22.86	22.96	26.69	20.99
France	T	102,381	96,672	98,585	19.97	21.52	21.09	1.98
Poland	T	59,930	48,112	43,523	11.69	10.71	9.31	- 9.54
Spain	T	25,871	27,595	22,279	5.05	6.14	4.77	- 19.27
Switzerland	T	23,212	20,451	22,152	4.53	4.55	4.74	8.32
Czech Republic	T	21,722	19,831	19,897	4.24	4.42	4.26	0.34
Belgium	T	19,569	16,974	17,994	3.82	3.78	3.85	6.01
Netherlands	T	15,492	13,301	14,524	3.02	2.96	3.11	9.19
United Kingdom	T	12,837	11,894	13,429	2.50	2.65	2.87	12.91
Austria	T	13,398	11,918	12,951	2.61	2.65	2.77	8.67
Romania	T	9,272	9,088	8,586	1.81	2.02	1.84	- 5.51
Hungary	T	6,239	5,169	8,173	1.22	1.15	1.75	58.11
Slovakia	T	7,626	7,343	7,378	1.49	1.63	1.58	0.47

Croatia	T	5,039	5,325	5,835	0.98	1.19	1.25	9.59
United Arab Emirates	T	3,952	3,481	5,285	0.77	0.78	1.13	51.82

Source: GTA

Table 13: Italy's leading table grape imports

Partner Country	Unit	Quantity			% Share			% Change 2016/2015
		2014	2015	2016	2014	2015	2016	
World	T	20,489	22,018	24,746	100.00	100.00	100.00	12.39
EU-28	T	11,294	14,330	18,218	55.12	65.08	73.62	27.13
Spain	T	4,272	5,074	6,022	20.85	23.04	24.33	18.68
Netherlands	T	4,194	5,728	5,858	20.47	26.02	23.67	2.26
Egypt	T	4,346	3,137	3,517	21.21	14.25	14.21	12.11
Greece	T	521	400	3,505	2.54	1.82	14.16	776.47
Chile	T	2,723	2,113	1,867	13.29	9.60	7.55	- 11.62
Germany	T	477	1,530	1,331	2.33	6.95	5.38	- 13.00
France	T	1,337	985	1,001	6.52	4.48	4.04	1.54
South Africa	T	954	1,323	480	4.66	6.01	1.94	- 63.70
Peru	T	461	907	464	2.25	4.12	1.88	- 48.83
Slovenia	T	74	35	164	0.36	0.16	0.66	366.62
India	T	367	151	147	1.79	0.68	0.60	- 2.19
Belgium	T	211	74	134	1.03	0.34	0.54	80.59
Poland	T	67	7	57	0.33	0.03	0.23	663.46
Malta	T	0	49	49	0.00	0.22	0.20	- 0.41
Lithuania	T	0	5	45	0.00	0.02	0.18	788.53

Source: GTA

Abbreviations and definitions used in this report:

EU European Union
MS EU-28 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: 080830
Table grapes: 080610