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Italy

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Fresh Deciduous Fruit Annual 2017

Report Categories:

Fresh Deciduous Fruit

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Report Highlights:

With approximately 1.7 million metric tons (MMT), Italy provides approximately 19 percent of the EU-28 apple production. Italy's marketing year (MY) 2017/18 apple production is forecast to drop significantly (-23 percent) from the previous campaign due to the frost that occurred during flowering at the end of April. Italy is the largest EU-28 pear producer. Its MY 2017/18 pear production is forecast at 719,000 MT, a 5 percent increase from the previous campaign (681,000 MT), but in line with the 2014-2016 yearly average. Italy is also the leading table grape producer in the EU-28, followed by Greece and Spain. Its MY 2017/18 table grape production is forecast to drop by 25 percent due to heavy rainfall in autumn. Fruit quality is expected to be excellent with higher sugar content due to the summer drought.

ITALY

I. APPLES

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

Apples	2015	2016	2017
	Estimates 2015/2016	Estimates 2016/2017	Forecast 2017/2018
	Post Data	Post Data	Post Data
Area Planted	55,476	56,164	56,168
Area Harvested	52,157	52,775	52,779
Commercial Production	2,286,628	2,272,027	1,756,776
Production	2,286,628	2,272,027	1,756,776
Intra EU-28 Imports	43,836	53,933	54,000
Extra EU-28 Imports	5,019	5,557	7,000
Total Imports	48,855	59,490	61,000
Total Supply	**2,335,483**	**2,331,517**	**1,817,776**
Fresh Domestic Consumption	1,019,239	1,013,579	629,124
Intra EU-28 Exports	645,479	725,523	590,000
Extra EU-28 Exports	400,103	362,415	300,000
Total Exports	1,045,582	1,087,938	890,000
For processing	270,662	230,000	298,652
Total Distribution	**2,335,483**	**2,331,517**	**1,817,776**

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

PRODUCTION

With approximately 1.7 million metric tons (MMT), Italy provides almost 19 percent of the EU-28 apple production. Alto Adige and Trentino cover approximately 70 percent of Italian apple production and 13 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* represent the most widely planted varieties. Italy's marketing year (MY) 2017/18 apple production is forecast to drop significantly (-23 percent) from the previous campaign due to the frost that occurred during flowering at the end of April. Production decreases are expected in Alto Adige (-7 percent), Trentino (-61 percent), and other regions (-17 percent). Reduced quantities are expected for *Golden Delicious* (-36 percent), *Red Delicious* (-20 percent), *Gala* (-14 percent), *Granny* (-11 percent), and *Fuji* (-5 percent). Overall, calibers are expected to be slightly smaller than average due to the end of April frost and the end of July hail.

Table 2: Italian apple production by region (MT)

Region	2015	2016	2017	Var. % 2017/2016

Alto Adige	1,127,227	1,063,676	989,516	-7
Trentino	535,899	535,140	209,381	-61
Other regions	623,502	673,211	557,879	-17
Total	**2,286,628**	**2,272,027**	**1,756,776**	**-23**

Sources: Assomela; CSO

CONSUMPTION

According to the latest industry forecast, approximately 83 percent of Italian apple supply will be suitable for domestic fresh consumption and export in MY 2017/18, while the remainder will be destined to the industry.

TRADE

Italy exported 1,087,938 MT of apples in MY 2016/17, mainly to Germany, Spain, and Egypt, accounting for 24, 10, and 6 percent of total exports, respectively. During the same period, Italy imported 59,490 MT of apples, mainly from Poland, Slovenia, France, and Germany, accounting for 28, 18, 12, and 12 percent of total imports, respectively.

Table 3: Italy's leading apple exports

Partner Country	Unit	Quantity			% Share			% Change
		2015	2016	2017	2015	2016	2017	2017/2016
World	T	1,117,819	1,045,582	1,087,938	100.00	100.00	100.00	4.05
Germany	T	290,297	284,568	263,446	25.97	27.22	24.22	- 7.42
Spain	T	81,866	88,216	109,635	7.32	8.44	10.08	24.28
Egypt	T	116,592	129,625	65,117	10.43	12.40	5.99	- 49.76
Saudi Arabia	T	40,643	51,959	58,466	3.64	4.97	5.37	12.52
Austria	T	12,535	12,952	47,619	1.12	1.24	4.38	267.66
United Kingdom	T	33,135	28,218	38,285	2.96	2.70	3.52	35.68
France	T	29,041	28,777	36,445	2.60	2.75	3.35	26.65
Sweden	T	37,233	35,058	33,189	3.33	3.35	3.05	- 5.33
Brazil	T	8,904	4,268	32,474	0.80	0.41	2.98	660.90
Netherlands	T	21,003	22,146	32,456	1.88	2.12	2.98	46.56

Source: GTA

Table 4: Italy's leading apple imports

Partner Country	Unit	Quantity			% Share			% Change
		2015	2016	2017	2015	2016	2017	2017/2016

World	T	41,071	48,855	59,490	100.00	100.00	100.00	21.77
Poland	T	1,947	5,538	16,462	4.74	11.34	27.67	197.23
Slovenia	T	691	2,409	10,686	1.68	4.93	17.96	343.61
France	T	6,683	9,512	7,051	16.27	19.47	11.85	- 25.87
Germany	T	5,959	3,134	6,990	14.51	6.41	11.75	123.02
Hungary	T	2,859	1,275	4,244	6.96	2.61	7.13	232.74
Chile	T	3,894	2,845	2,422	9.48	5.82	4.07	- 14.86
Croatia	T	394	2,906	1,647	0.96	5.95	2.77	- 43.33
Spain	T	1,057	1,509	1,504	2.57	3.09	2.53	- 0.33
Austria	T	2,360	4,214	1,455	5.75	8.62	2.45	- 65.48
Netherlands	T	1,282	717	1,378	3.12	1.47	2.32	92.11

Source: GTA

II. PEARS

Table 5: Area (Hectares), Supply and Distribution (Metric Tons)

Pears	2015	2016	2017
	Estimates 2015/2016	Estimates 2016/2017	Forecast 2017/2018
	Post Data	Post Data	Post Data
Area Planted	32,323	32,285	32,283
Area Harvested	30,533	30,973	30,971
Commercial Production	764,000	681,000	719,000

Production	764,000	681,000	719,000
Intra EU-28 Imports	37,097	45,025	45,000
Extra EU-28 Imports	50,717	46,137	46,000
Total Imports	87,814	91,162	91,000
Total Supply	**851,814**	**772,162**	**810,000**
Fresh Domestic Consumption	611,741	569,131	594,100
Intra EU-28 Exports	141,652	125,576	132,000
Extra EU-28 Exports	14,381	9,655	12,000
Total Exports	156,033	135,231	144,000
For processing	84,040	67,800	71,900
Total Distribution	**851,814**	**772,162**	**810,000**

Sources: Istat; CSO; GTA

PRODUCTION

Italy is the largest EU-28 pear producer. Approximately 32,285 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 2017/18 pear production is forecast at 719,000 MT, a 5 percent increase from the previous campaign (681,000 MT), but in line with the 2014-2016 yearly average.
Pear production in Emilia-Romagna is forecast at 486,000 MT in MY 2017/18, 6 percent more than MY 2015/16, but in line with the 2014-2016 yearly average. Production increases are forecast for *Coscia-Ercollini* (+13 percent), *Abate Fetel* (+12 percent), *Doyenne du Comice* (+11 percent), *Decana* (+11 percent), and *Kaiser* (+3 percent) varieties, while production decreases are forecast for W*illiam BC* (-5 percent) and *Conference* (-2 percent). Fruit quality is expected to be excellent. Calibers are expected to be smaller than the last campaign due to the summer drought.

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 2017/18, while the remainder will be destined to the industry.

TRADE

Italy exported 135,231 MT of pears in MY 2016/17, mainly to Germany, France, and Romania, accounting for 40, 15, and 7 percent of total exports, respectively. Italy's MY 2016/17 pear imports reached 91,162 MT, mainly from Spain, Argentina, and Chile, accounting for 33, 23, and 17 percent of total imports, respectively.

Table 6: Italy's leading pears exports

Partner Country	Unit	Quantity			% Share			% Change
		2015	2016	2017	2015	2016	2017	2017/2016
World	T	165,518						- 13.33

			156,033	135,231	100.00	100.00	100.00	
Germany	T	66,983	65,006	54,600	40.47	41.66	40.38	- 16.01
France	T	20,401	21,648	19,965	12.33	13.87	14.76	- 7.77
Romania	T	10,854	12,193	9,830	6.56	7.81	7.27	- 19.38
Austria	T	9,826	10,118	9,076	5.94	6.48	6.71	- 10.30
United Kingdom	T	5,120	5,459	4,808	3.09	3.50	3.56	- 11.93
Hungary	T	4,415	3,596	4,628	2.67	2.30	3.42	28.68
Croatia	T	4,619	3,790	3,351	2.79	2.43	2.48	- 11.58
Switzerland	T	1,929	3,020	2,990	1.17	1.94	2.21	- 1.00
Poland	T	1,870	2,111	2,834	1.13	1.35	2.10	34.23
Slovenia	T	3,903	3,527	2,730	2.36	2.26	2.02	- 22.60

Source: GTA

Table 7: Italy's leading pears imports

Partner Country	Unit	Quantity			% Share			% Change
		2015	2016	2017	2015	2016	2017	2017/2016
World	T	98,800	87,814	91,162	100.00	100.00	100.00	3.81
Spain	T	27,063	18,376	30,067	27.39	20.93	32.98	63.63
Argentina	T	24,998	28,519	21,213	25.30	32.48	23.27	- 25.62
Chile	T	16,715	13,836	15,847	16.92	15.76	17.38	14.54
Netherlands	T	9,847	6,920	8,994	9.97	7.88	9.87	29.97
South Africa	T	8,193	7,471	6,791	8.29	8.51	7.45	- 9.11
France	T	4,600	7,082	3,330	4.66	8.07	3.65	- 52.98

Uruguay	T	1,314	285	1,679	1.33	0.32	1.84	488.50
Belgium	T	1,609	3,019	1,608	1.63	3.44	1.76	- 46.72
China	T	565	602	586	0.57	0.69	0.64	- 2.67
Germany	T	554	239	474	0.56	0.27	0.52	98.08

Source: GTA

III. TABLE GRAPES

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

Table grapes	2015	2016	2017
	Estimates 2015/2016	Estimates 2016/2017	Forecast 2017/2018
	Post Data	Post Data	Post Data
Area Planted	47,819	46,926	46,924
Area Harvested	46,939	46,161	46,159
Production	1,044,607	1,000,000	750,000
Intra EU-28 Imports	17,782	16,240	16,245
Extra EU-28 Imports	6,528	6,680	6,685
Total Imports	24,310	22,920	22,930
Total Supply	**1,068,917**	**1,022,920**	**772,930**
Fresh Domestic Consumption	598,313	541,918	360,380
Intra EU-28 Exports	426,658	437,763	374,550
Extra EU-28 Exports	43,446	42,739	38,000
Total Exports	470,104	480,502	412,550

Withdrawal from market	500	500	0
Total Distribution	**1,068,917**	**1,022,920**	**772,930**

Sources: ISTAT; Industry contacts; GTA

PRODUCTION

Italy is the leading table grape producer in the EU-28, followed by Greece and Spain. Its MY 2017/18 table grape production is forecast to drop by 25 percent due to heavy rainfall in autumn. Fruit quality is expected to be excellent with higher sugar content due to the summer drought. 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 68 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*.

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, a growing number of 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 grapes available after the busy summer fruit season.

TRADE

In MY 2016/17, Italy exported 480,502 MT of table grapes, mainly to Germany, France, and Poland, accounting for 28, 21, and 10 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, the Middle East, and North Africa. Seedless varieties (i.e. *Sugar Crisp*, *Sweet Sunshine*, *Sweet Celebration*, *Sweet Sapphire*, *Jack's Salute*, *Cotton Candy*) are mainly sent to the United Kingdom, Scandinavian countries, and the United Arab Emirates. In MY 2016/17, Italy imported 22,920 MT of table grapes, mainly from the Netherlands, Spain, and Greece, accounting for 25, 19, and 14 percent of total imports, respectively.

Table 9: Italy's leading table grape exports

Partner Country	Unit	Quantity			% Share			% Change
		2015	2016	2017	2015	2016	2017	2017/2016
World	T	449,143	470,104	480,502	100.00	100.00	100.00	2.21
Germany	T	103,104	124,748	133,150	22.96	26.54	27.71	6.74
France	T	96,672	99,255	100,683	21.52	21.11	20.95	1.44

Poland	T	48,112	43,711	47,329	10.71	9.30	9.85	8.28
Switzerland	T	20,451	22,147	22,372	4.55	4.71	4.66	1.02
Spain	T	27,595	22,412	22,094	6.14	4.77	4.60	- 1.42
Czech Republic	T	19,831	19,897	19,975	4.42	4.23	4.16	0.39
Belgium	T	16,974	18,243	17,744	3.78	3.88	3.69	- 2.73
United Kingdom	T	11,894	13,439	14,093	2.65	2.86	2.93	4.87
Netherlands	T	13,301	14,542	13,140	2.96	3.09	2.73	- 9.64
Austria	T	11,918	12,951	12,319	2.65	2.75	2.56	- 4.88

Source: GTA

Table 10: Italy's leading table grape imports

Partner Country	Unit	Quantity			% Share			% Change
		2015	2016	2017	2015	2016	2017	2017/2016
World	T	22,494	24,310	22,920	100.00	100.00	100.00	- 5.72
Netherlands	T	6,059	5,547	5,693	26.94	22.82	24.84	2.63
Spain	T	5,154	5,942	4,324	22.91	24.44	18.87	- 27.23
Greece	T	400	3,524	3,197	1.78	14.50	13.95	- 9.30
Egypt	T	3,137	3,517	2,638	13.95	14.47	11.51	- 24.99
Chile	T	2,113	1,867	2,294	9.39	7.68	10.01	22.82
France	T	989	996	1,308	4.40	4.10	5.71	31.28
Germany	T	1,591	1,270	1,079	7.07	5.22	4.71	- 15.00
South Africa	T	1,323	480	705	5.88	1.98	3.08	46.71
Peru	T	907	464	530	4.03	1.91	2.31	14.28
India	T	151	147	491	0.67	0.61	2.14	233.61

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

Harmonized System (HS) Codes:
Apples: 080810
Pears: 080830
Table grapes: 080610