

Strawberry cultivated areas in 2017 and analysis of the 2016 campaign

In Italy, areas destined to strawberry cultivation will increase this year compared to 2016. With little over 3,600 hectares, strawberry crops increase by 3% and reach the highest level of the past few years.

Basilicata and Campania now represent 47% of the domestic strawberry production. Crops in Basilicata have grown by 4% compared to last year, while those in Campania increased by 5%. Investments in Sicily have remained stable while Veneto saw a 5% increase in cultivated areas.

Emilia Romagna experienced a 3% drop, while cultivated areas in Calabria dropped by 6%. There was a 3% increase in Piedmont and the Trento and Bolzano provinces remained stable.

Exports

14,000 tons of strawberries were exported in 2016, i.e. 6% more than in 2015. Despite the recovery, quantities remain well below the 18,000 tons exported in 2010-2012.

The value increased by 10% compared to last year, with over €36 million. The average price was €2.53/kg, 4% more than in 2015.

Italian exports tend to be destined to EU28 countries - 86% of the total in 2016 - and mainly to Germany and Austria. The remaining 14% is shipped to Extra-EU28 countries, and especially to Switzerland.

In 2016, 5,700 tons (40% of the total) were exported to Germany - slightly lower than the previous year. The 2,300 tons sent to Austria represent 23% of the total, similar to the past campaign. Slovenia, Croatia and the UK follow with respectively 7, 5 and 4% of the total. Quantities sent to Slovenia appear to be diminishing over time, while those sent to Croatia are increasing. The UK remain stable.

During the last campaign, all the exports towards extra-EU28 countries were destined to Switzerland, which absorbed 14% of the total with 2,000 tons. It was an increase compared to 2015 but still below the volumes shipped during previous years.

The strawberry export calendar usually centres around April and May. In 2016 too, 76% of shipments took place during this period. 33% of strawberries were shipped in April, a stable quantity compared to the previous year, while 43% of the total was shipped in May, slightly less than in 2015. March saw an increase of the total volumes with 10% of the total, confirming the early production trend. Only 3% of the volumes were shipped in June.

Imports

In 2016, Italy imported over 34,500 tons of strawberries, 7% more than 2015. Nonetheless, the total value of €66 million dropped by 5% compared to the previous year. The average price dropped by 11% to €1.91.

The main suppliers are, as usual, EU-28 countries. Spain provided 79% of the total volume, the highest share since 2010 with over 27,000 tons. France follows with around 3,000 tons and 9% of the total. Germany occupies the third place with 1,700 tons and 5% of the total. Produce from Greece continues to decrease and now covers only 3% of the total compared to the 12% of 2011.

Only small quantities come from countries outside the European Union.

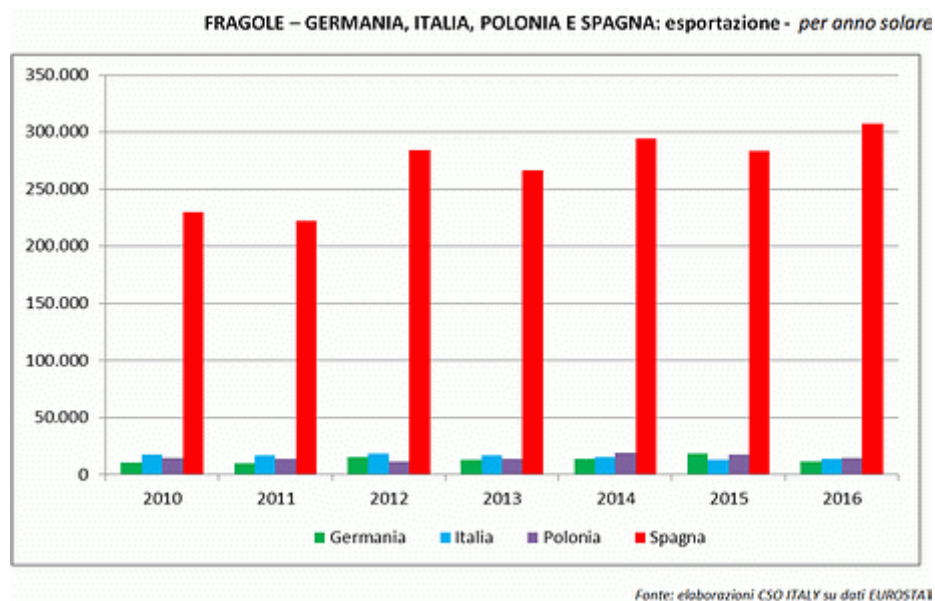
73% of imports arrive between March and May while more limited quantities arrive in January, February and June. In March 2016, Italy imported 23% of the total, a lower share than last year's 26%. April also saw a 5% drop with 30% of the total. There was an increase in May, with 20% of the total against the 17% of the previous year. 4 and 5% of the total quantities were imported in January and June respectively. 12% of the total was imported in February, the highest share registered for this month thanks to the early productions favoured by last winter's good temperatures and weather.

Italy's competitors are Spain, Germany and Poland. During the past campaign, Spain exported over 300,000 tons, the highest volume of the past decade and 10% more than the previous year. 97% of shipments is destined to EU28 countries. The main outlet is Germany

with over 100,000 tons (14% more than 2015), followed by France with 55,000 tons (18% of the total), the UK with 37,000 tons (12% of the total), Italy with 8% of the total, Portugal (5%), Poland, Austria and the Netherlands. Exports to extra-EU28 countries cover only 2% of the total.

German and Polish exports are more similar to Italy. Poland exported over 14,000 tons of strawberries during the last campaign, 15% less than 2015. 45% was shipped to EU28 countries and mainly Germany (1% of the total). Extra-EU28 countries absorb 55% of the total, which is shipped mainly to Belarus (7,000 tons).

Germany exported around 15,000 tons on average between 2005 and 2015 but with great fluctuations. The best year was 2007 with over 24,000 tons while, in 2011, volumes remained below 10,000 tons. In 2016, around 12,000 tons were exported in total, i.e. -32% than 2015. 98% of the total is shipped to EU28 countries and mainly to Austria, which in 2016 absorbed 46% of the total (5% more than the previous year). France follows with 12%.



This small fruit is doing rather well on the domestic market. According to the GfK data processed by CSO Italy, domestic consumption is increasing year after year. 86 thousand tons were exceeded in 2016, achieving a 4% increase on 2015. The trend seems to be growing in the long term too, as there is a 24% increase compared to 2007.

Lien article : <http://www.freshplaza.com/article/172740/Strawberry-cultivated-areas-in-2017-and-analysis-of-the-2016-campaign>