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Fresh Deciduous Fruit Annual 2013

Report Categories:

Fresh Deciduous Fruit

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Report Highlights:

With more than 2MMT, Italy provides around 20 percent of the EU-28 apple production. MY 2013/14 apple production is forecast to increase by 10.8 percent compared to the previous year. Italy is the largest pear producer in the EU-28 and ranks third in the world after China and the United States. Italy's MY 2013/14 pear production is forecast at 741,000 MT, a 14 percent increase over last season's supply mainly thanks to good flowering and fruit set. Italy ranks sixth in world's table grape production and third among table grape exporters, behind Chile and the United States. Italy's MY 2013/14 table grape production is forecast to increase significantly from the previous campaign, mainly thanks to favorable weather during flowering and fruit set.

I. APPLES

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

Apples	2011	2012	2013
	Estimates 2011/2012	**Estimates 2012/2013**	**Forecast 2013/2014**
	Post Data	**Post Data**	**Post Data**
Area Planted	56,835	54,684	52,000
Area Harvested	54,045	51,872	50,750
Commercial Production	2,292,762	1,939,014	2,147,963
Production	2,292,762	1,939,014	2,147,963
Intra EU-28 Imports	23,638	33,183	32,830
Extra EU-28 Imports	7,956	8,094	8,070
Total Imports	31,594	41,277	40,900
Total Supply	**2,324,356**	**1,980,291**	**2,188,863**
Fresh Domestic Consumption	1,039,628	972,275	1,093,888
Intra EU-28 Exports	676,615	580,183	590,000
Extra EU-28 Exports	285,159	220,245	215,000
Total Exports	961,774	800,428	805,000
For processing	322,954	207,588	289,975
Total Distribution	**2,324,356**	**1,980,291**	**2,188,863**

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

PRODUCTION

With more than 2MMT, Italy provides around 20 percent of the EU-28 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. Italy's MY 2013/14 apple production is forecast to increase by 10.8 percent compared to the previous year. Alto Adige and Trentino registered production increases of 10.7 percent and 6.7 percent respectively, compared to 2012. Remarkable increases are forecast for *Fuji* (+32 percent), *Granny Smith* (+28 percent), *Imperatore* (+25 percent), *Red Delicious* (+17 percent), *Gala* (+6 percent), and *Golden Delicious* (+5 percent). Fruit size is forecast to be lower due to season delay by 8-10 days, but quality is high.

Table 2: Italian apple production by region (MT)

	2011	2012	2013 (Forecast)	Var. 2013/2012
Alto Adige	1,180,991	944,185	1,045,456	10.7%
Trentino	504,801	455,070	485,648	6.7%
Other regions	606,970	539,759	616,850	14.3%
Total	**2,292,762**	**1,939,014**	**2,147,963**	**10.8%**

Source: Assomela; CSO

Table 3: Italian apple production by variety (MT)

Apple Production by Variety	Estimates 2011/2012	Estimates 2012/2013	Forecast 2013/2014
Golden Delicious	1,020,794	898,243	958,433
Red Delicious	253,311	192,380	223,116
Imperatore	61,106	56,101	66,445
Stayman	16,993	12,524	11,638
Gala	318,313	277,448	291,663
Granny Smith	121,652	96,297	120,493
Gloster	169	171	0
Elstar	704	705	551
Annurca	35,000	35,000	40,000
Renette	27,198	21,884	26,699
Jonagold	16,987	11,167	9,956
Jonathan	60	203	0
Braeburn	102,219	76,515	78,838
Idared	2,484	2,198	0
Fuji	164,012	132,052	170,373
Cripps Pink	91,807	65,520	68,052
Other	59,953	60,608	81,706
Total	**2,292,762**	**1,939,014**	**2,147,963**

Source: Assomela; CSO

CONSUMPTION

Experts estimate that in MY 2013 around 86.5 percent (1,857,988 MT) of the Italian crop will be suitable for domestic fresh consumption and export, while the remainder (289,975MT) will be destined to the industry.

TRADE

In MY 2012/13, Italy exported 800,428 MT of apples, mainly to Germany (230,731 MT), Spain (89,781 MT), Libya (52,323 MT), France (41,643 MT), and Algeria (38,210 MT). In MY 2012/13, Italy imported 41,277 MT of apples, mainly from Germany (10,009 MT), Chile (6,012 MT), France (4,948 MT), Slovakia (4,613 MT), and Poland (3,264 MT).

II. PEARS

Table 4: Production, Supply, and Demand (MT)

Pears	2011	2012	2013
	Estimates 2011/2012	Estimates 2012/2013	Forecast 2013/2014
	Post Data	Post Data	Post Data
Area Planted	39,411	36,700	36,500
Area Harvested	36,326	34,600	34,800
Commercial Production	934,000	650,000	741,000
Production	934,000	650,000	741,000
Intra EU-28 Imports	10,651	35,483	32,000
Extra EU-28 Imports	48,297	58,090	55,000
Total Imports	58,948	93,573	87,000
Total Supply	**992,948**	**743,573**	**828,000**
Fresh Domestic Consumption	806,490	535,819	611,900
Intra EU-28 Exports	70,549	124,219	124,000
Extra EU-28 Exports	10,367	18,535	18,000
Total Exports	80,916	142,754	142,000
For processing	105,542	65,000	74,100
Total Distribution	**992,948**	**743,573**	**828,000**

Source: Istat; CSO; GTA

PRODUCTION

Italy is the largest pear producer in the EU-28 and ranks third in the world after China and the United States. Approximately 36,500 hectares of pear orchards are cultivated in Italy, mainly located in the northeast. Pear planted area has been declining over the last decade due to lack of profitable investment opportunities. Emilia-Romagna (Ferrara, Modena, and Bologna) is the main producing area with almost 66 percent of Italy's total output. *Abate Fetel* is the dominant variety, followed by *William B.C.*, *Conference, Kaiser*, *Coscia-Ercollini*, *Doyenne du Comice*, *Passacrassana*, and *Guyot.* Italy's MY

2013/14 pear production is forecast at 741,000 MT, a 14 percent increase over last season's supply mainly thanks to good flowering and fruit set. Remarkable increases are forecast for *Kaiser* (+46 pecent), *Abate* (+21 percent), and *William BC* (+7 percent). Fruit size and quality are forecast to be good.

Table 5: Italian pear production by variety (MT)

Pear Production by Variety	Estimates 2011/2012	Estimates 2012/2013	Forecast 2013/2014
Abate Fetel	398,000	252,000	304,000
Conference	106,000	72,000	75,000
Coscia	45,000	41,000	37,000
Doyenne du Comice	32,000	23,000	25,000
Guyot	3,000	2,000	2,000
Kaiser	55,000	34,000	49,000
Passacrassana	5,000	4,000	4,000
William B.C.	205,000	150,000	161,000
Other	86,000	72,000	84,000
Total	**934,000**	**650,000**	**741,000**

Source: CSO

CONSUMPTION

Italy consumes most of its domestic production, exporting almost 19 percent.

TRADE

Italy's MY 2012/13 pear imports reached 93,573 MT, mainly from Argentina (37,145 MT), Spain (22,824 MT), Chile (12,970 MT), and South Africa (6,509 MT). In MY 2012/13, Italy exported 142,754 MT of pears, mainly to Germany (62,341 MT), France (21,756 MT), Austria (7,882 MT), and Libya (7,242 MT).

III. TABLE GRAPES

Table 6: Production, Supply, and Demand (MT)

Table grapes	2011	2012	2013
	Estimates 2011/2012	Estimates 2012/2013	Forecast 2013/2014
	Post Data	Post Data	Post Data
Area Planted	59,455	53,885	53,893
Area Harvested	55,609	50,656	50,659
Production	1,212,312	1,130,011	1,300,000
Intra EU-28 Imports	14,949	13,048	13,000
Extra EU-28 Imports	8,861	6,510	6,100
Total Imports	23,810	19,558	19,100
Total Supply	**1,236,122**	**1,149,569**	**1,319,100**
Fresh Domestic Consumption	741,042	669,520	831,750
Intra EU-28 Exports	444,641	422,342	429,500
Extra EU-28 Exports	50,439	57,707	57,850
Total Exports	495,080	480,049	487,350
Total Distribution	**1,236,122**	**1,149,569**	**1,319,100**

Source: ISTAT; Industry contacts; GTA

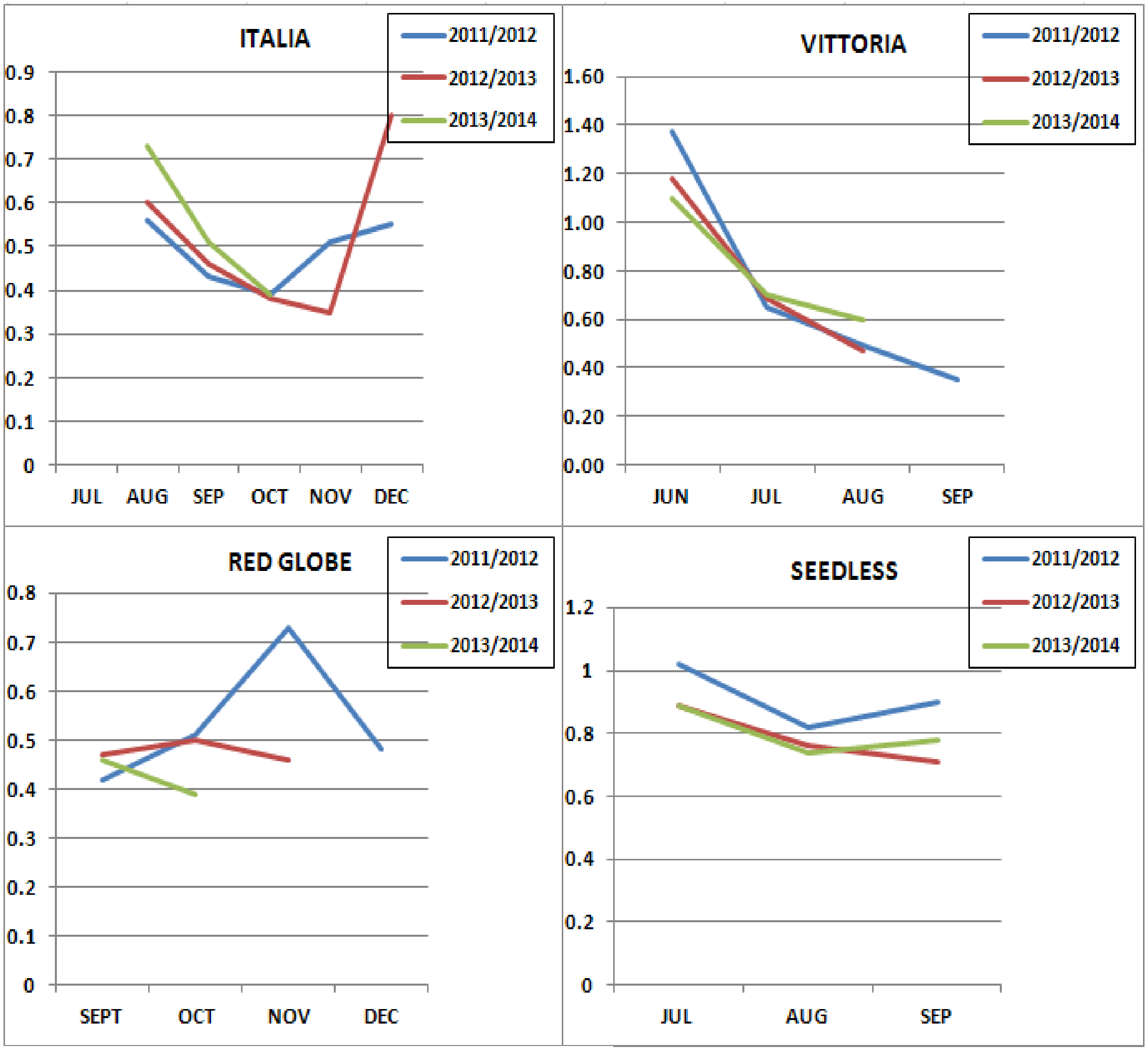
PRODUCTION

Italy ranks sixth in world's table grape production and third 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 70 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, due 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*.

Italy's MY 2013/14 table grape production is forecast to increase significantly from the previous campaign, mainly thanks to favorable weather during flowering and fruit set.
Early (*Black Magic* and *Vittoria*), medium and late (*Italia*, *Palieri*, *Pizzutello Bianca*, and *Red Globe*), and seedless varieties that have been grown using the overhead table grape vineyard system ("tendone" training system) are reported to be of excellent quality, color, and sugar content. 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 Sicily, Abruzzo, Apulia, Basilicata, and

Sardinia—the harvest occurs from August to December.

Table 7: 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-28, followed by Germany, the United Kingdom, France, and Spain. Despite the fact that Italian seeded grapes are still appreciated, experts claim that EU-28 consumers are increasingly demanding seedless varieties. Thus, many EU-28 table grapes farmers are replacing old seeded varieties with new seedless ones (i.e. *Sugraone*, *Crimson*, *Thompson*, *Centennial*, *Sublime*, etc.)

TRADE

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

Table 8: Italy's exports of table grapes (MT)

Partner Country	Quantity			% Change
	2011	2012	2013	2013/2012
Germany	112,581	115,342	108,359	- 6.05
France	91,848	100,204	96,950	- 3.25
Poland	53,593	56,299	59,617	5.89
Spain	23,387	27,530	22,134	- 19.60
Switzerland	22,832	21,745	20,873	- 4.01
Czech Republic	22,173	24,900	19,636	- 21.14
Belgium	16,199	17,963	18,501	2.99
Russia	13,922	12,127	16,784	38.40
Netherlands	13,060	14,295	15,197	6.31
Romania	13,276	15,009	13,313	- 11.30
World	**477,099**	**495,080**	**480,049**	**- 3.04**

Source: GTA

Table 9: Italy's imports of table grapes (MT)

Partner Country	Quantity			% Change
	2011	2012	2013	2013/2012
Spain	4,999	6,934	4,900	- 29.34
Netherlands	3,053	4,234	4,861	14.81
Egypt	2,254	2,628	3,516	33.78
Chile	4,909	2,900	1,977	- 31.85
France	984	1,257	1,232	- 1.96
Germany	691	928	843	- 9.19
South Africa	908	961	577	- 39.95
Greece	414	955	430	- 54.97
Belgium	138	374	294	- 21.33
Poland	0	39	257	552.07
World	**20,516**	**23,810**	**19,558**	**- 17.86**

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: 080820
Table grapes: 08061010