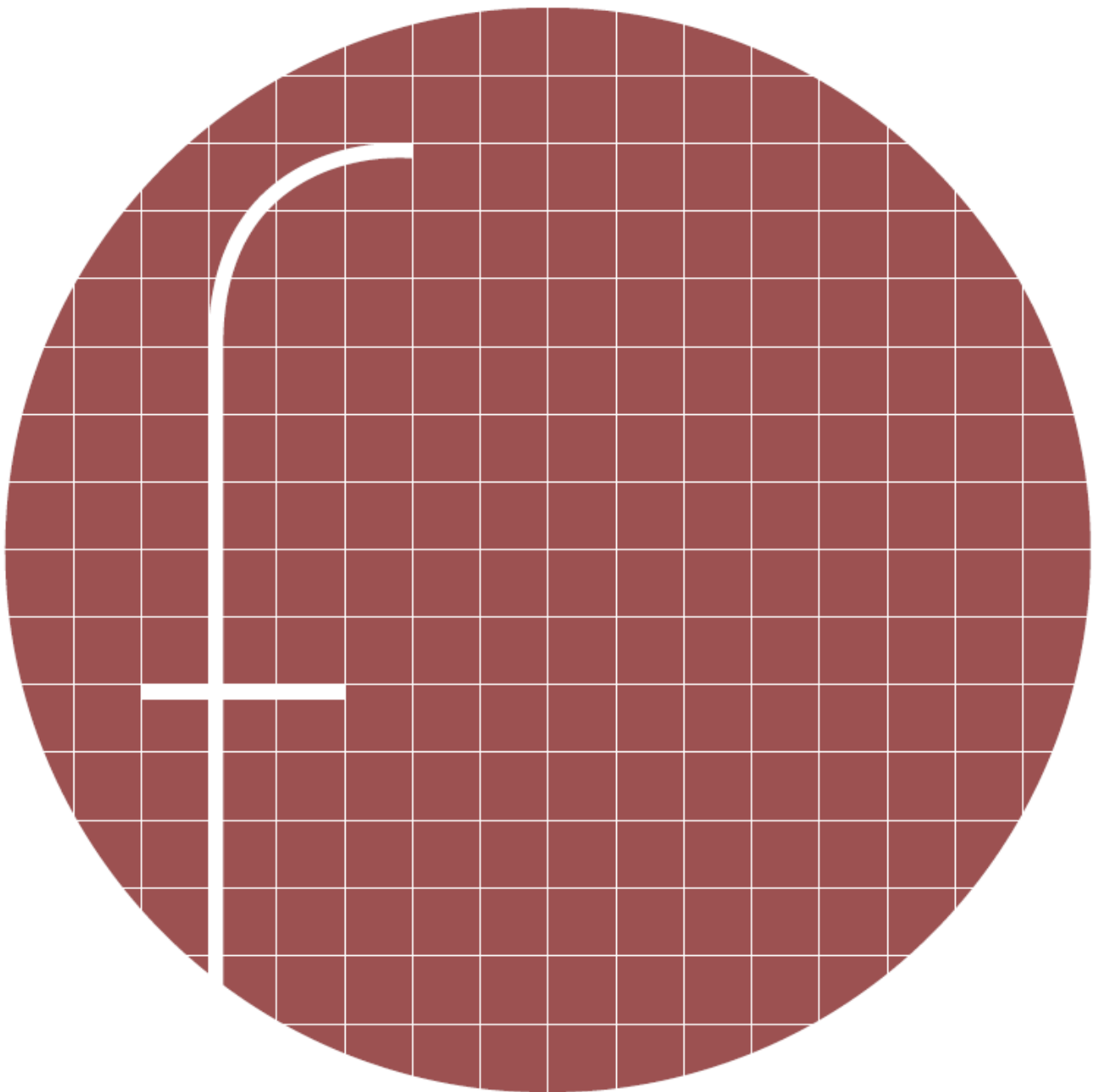


Focus: Fruit and vegetables

The dynamics of Italian trade flows





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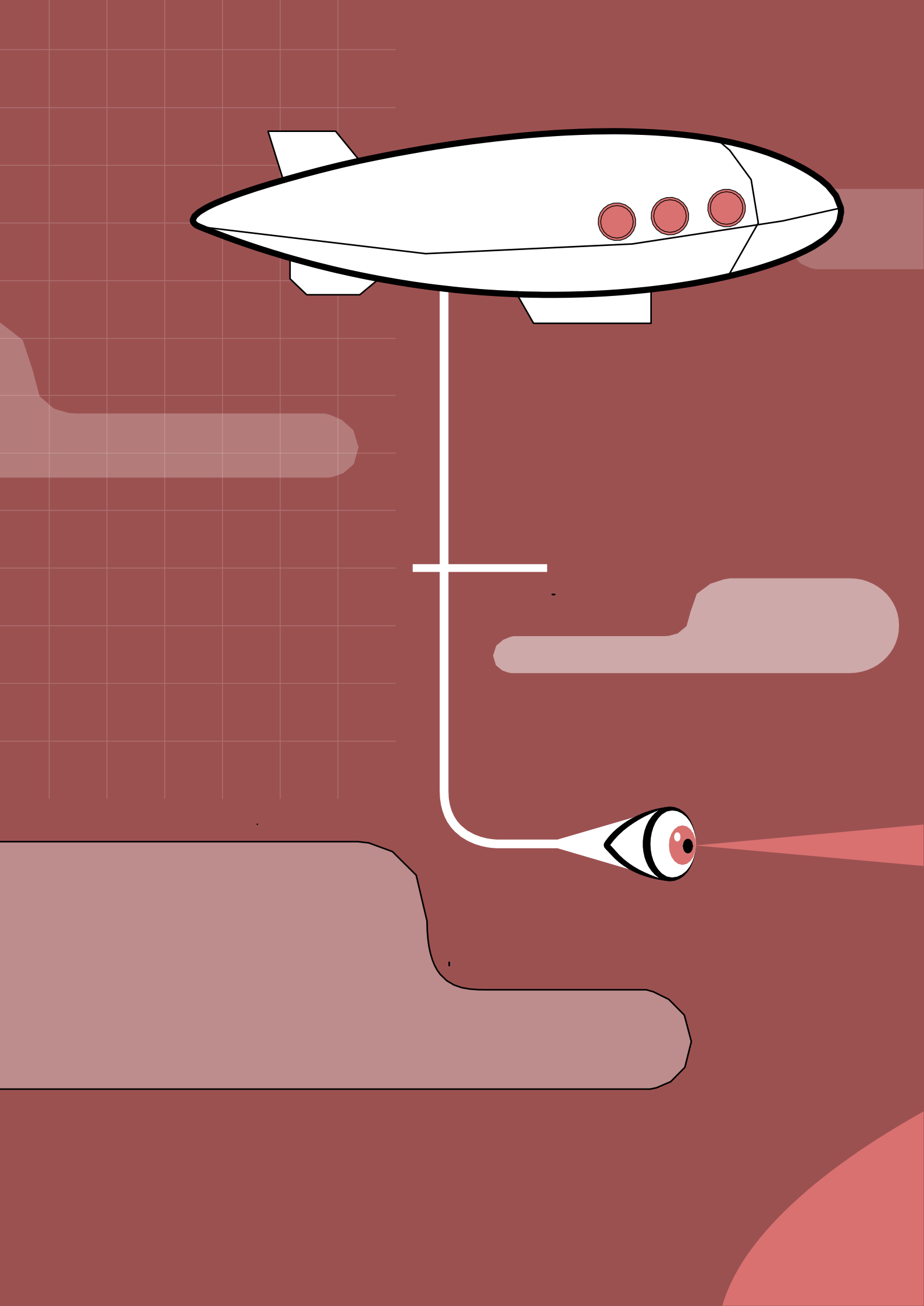
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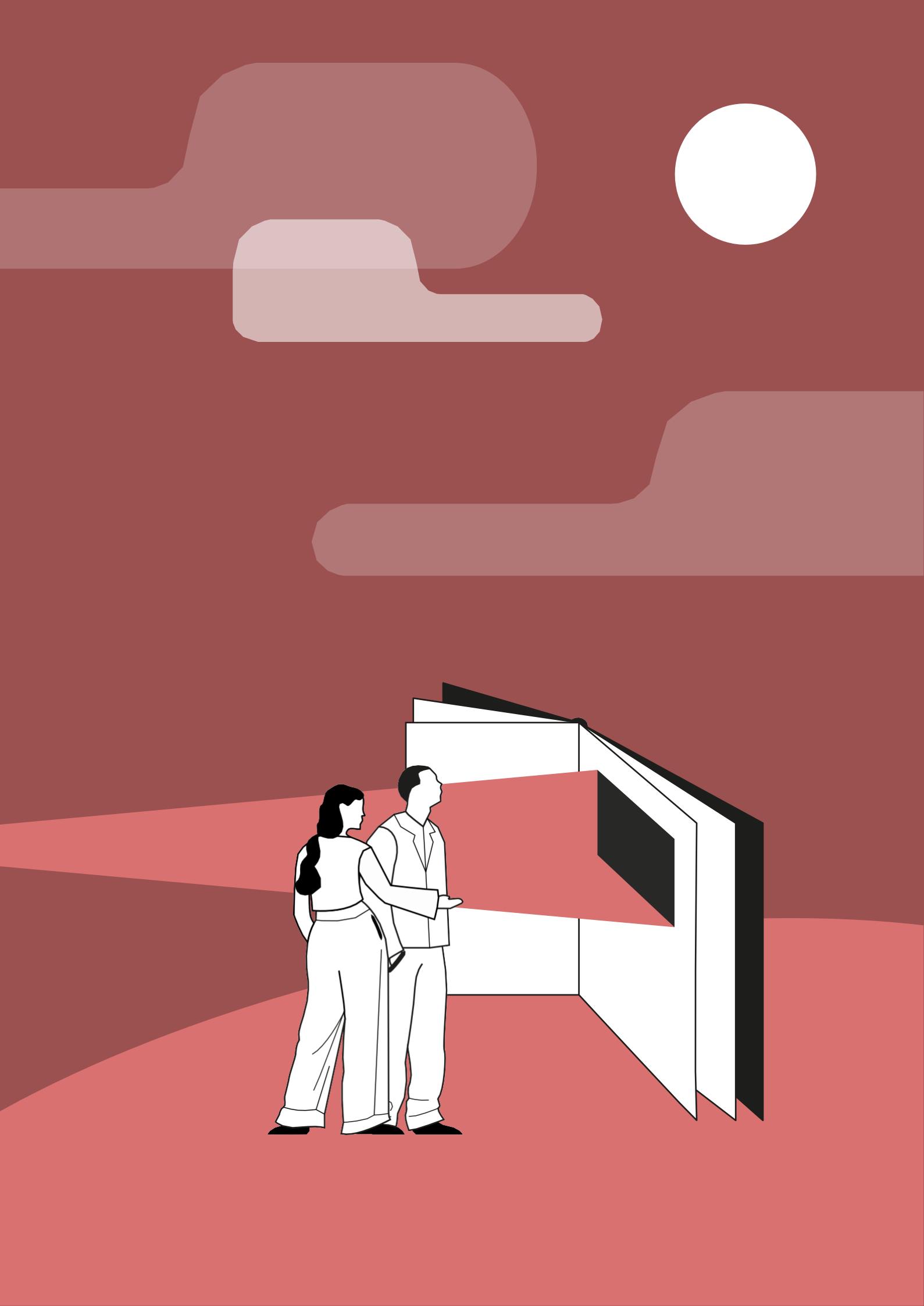
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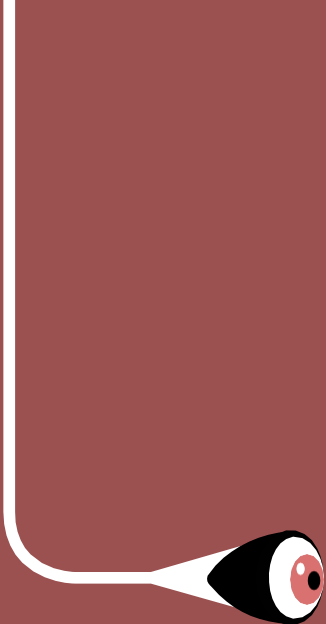
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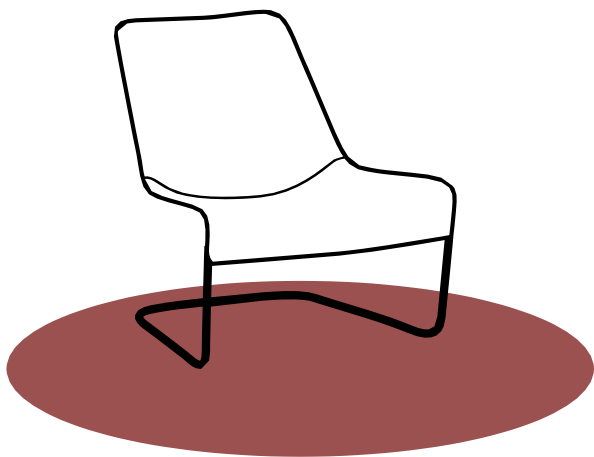
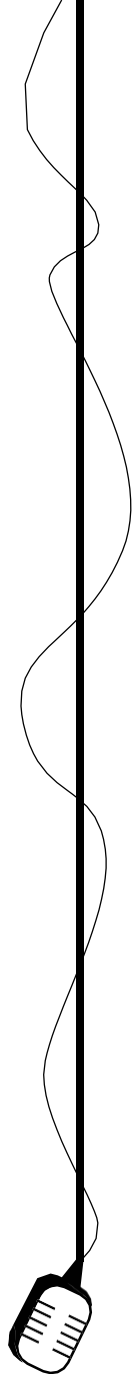




Index

Introduction - p. 9

1. Performance on world markets - p. 11
2. The main export items - p. 15
3. The European framework, the main competitors - p. 19
4. What we import - p. 23



Introduction

The performances recorded on foreign markets confirm the appreciation of Italian fruit and vegetables all over the world with 10.6 billion Euro of exports in 2022. It is the result of a 25% growth in the last 5 years, although the increase in volumes is much more limited (+2.5%). Today the fruit and vegetable sector leads national agri-food exports and represents 17% (10.6 billion Euro), followed by wine production with just over 7.8 billion Euro and, in third place, by dairy products with approximately 5 billion Euro. Two thirds of fruit and vegetable exports (7.1 billion Euro) remain within the European borders, while non-EU markets absorb the remainder for a value of 3.5 billion Euro. Overall, the balance of the Italian fruit and vegetable trade balance is confirmed as positive with 2.2

million tons of product and for a value of 2.6 billion Euro, with results supported by the good performance of processed products which compensate for the difficulties recorded by fresh products. This document aims to analyse the main export dynamics of the sector by making use of a comparative analysis involving the main European competitors, such as Spain, which in recent years has gained ground compared to our country. Italy boasts important European records for the export of apples, kiwis, shelled hazelnuts and tomato preserves. And, while on the one hand these results confirm the appreciation of Italian products on foreign markets, on the other they prompt certain reflections on the 'challenges' facing the sector.

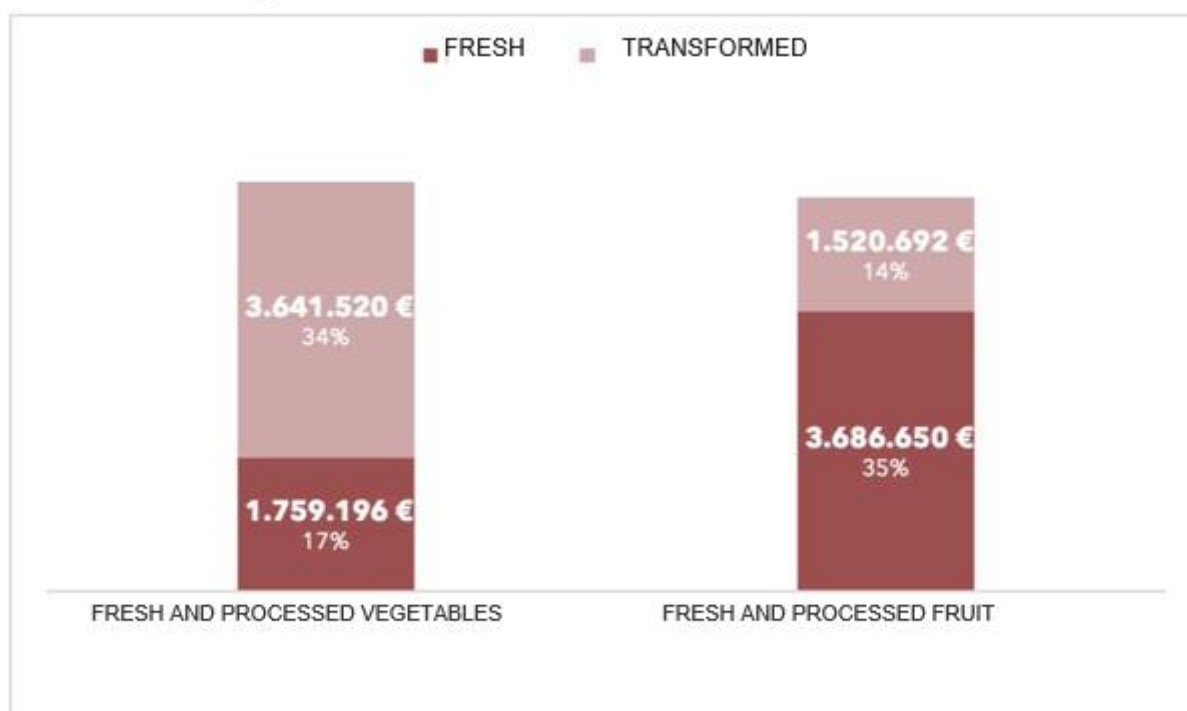
1.



1. Performance on world markets

The sector is confirmed as the main driver of Italian agri-food exports which in 2022 reached a record of 61 billion Euro. Fruit and vegetables with 10.6 billion Euro are in fact the first item of agri-food exports which guarantees 7.5 million tons of Italian fruit and vegetables on world tables. In the last 5 years, exports have grown by 25% in value with a slight increase in exported volumes (+2.3%). This differential is undoubtedly attributable to the initiative pushes, but it is also linked to a positive product *Made in Italy* enhancement activity. Just over half of fruit and vegetable exports is guaranteed by horticultural production with 5.4 billion Euro, while fruit production reached a value of 5.2 billion in 2022.

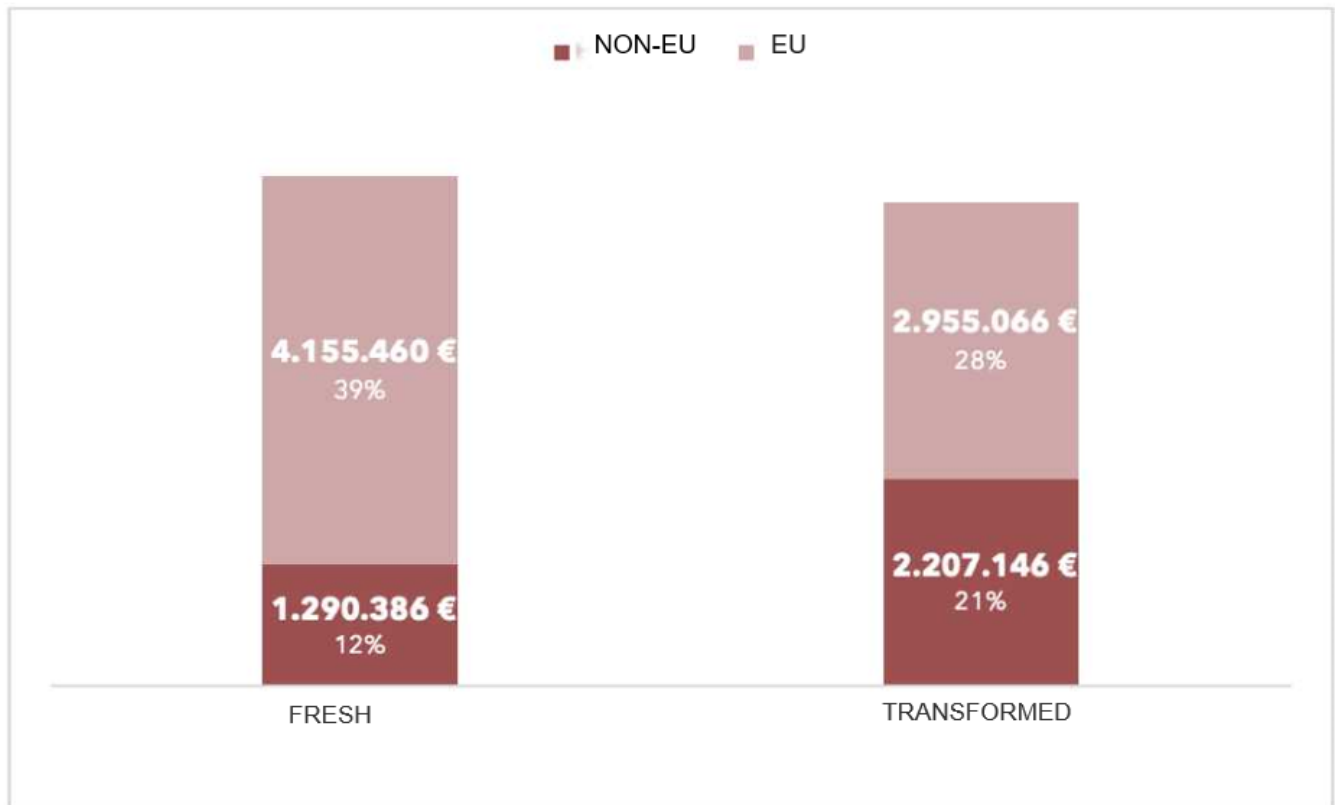
Fig. 1.1: The value of Italian fruit and vegetable exports for fruit and vegetables (2022, '000 Euro and %)



Source: Centro Studi Divulga elaborations on Ismea data

5 1% of exports are still the prerogative of fresh products for a value of 5.44 billion with the remaining 49% of processed products, for 5.16 billion.

Fig. 1.2: The value of fresh and processed Italian fruit and vegetable exports (2022, '000 Euro and %)



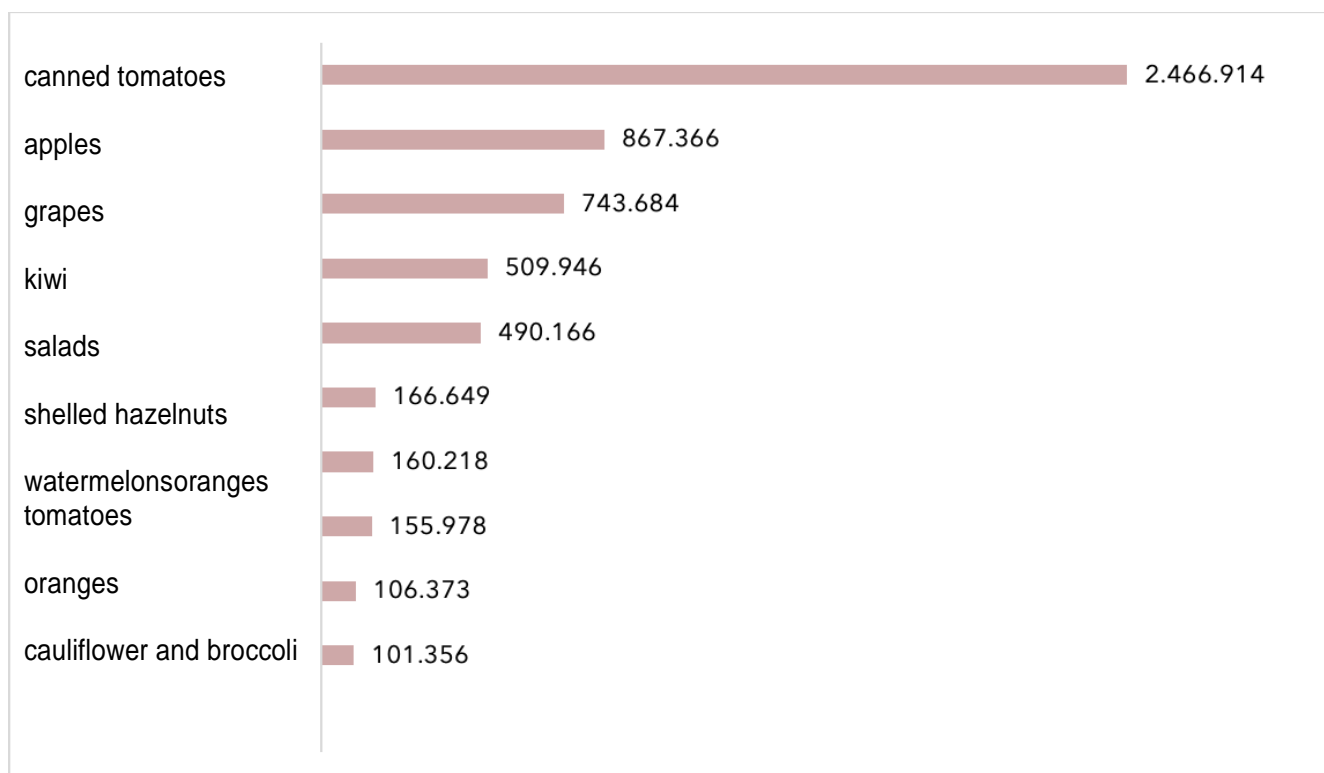
2.



2. The main export items

Ranking high in the export of Italian fruit and vegetable, in first place canned tomatoes for a value of 2.46 billion followed immediately afterwards, in second position, by apples (867 million) and on the last step of the podium by grapes (743 million). Followed by: kiwis (509 million), salads (490 million), shelled hazelnuts (166 million), watermelons (160 million), fresh tomatoes (155.9 million), oranges (106 million), cauliflower and broccoli (101 million) and pears (80 million).

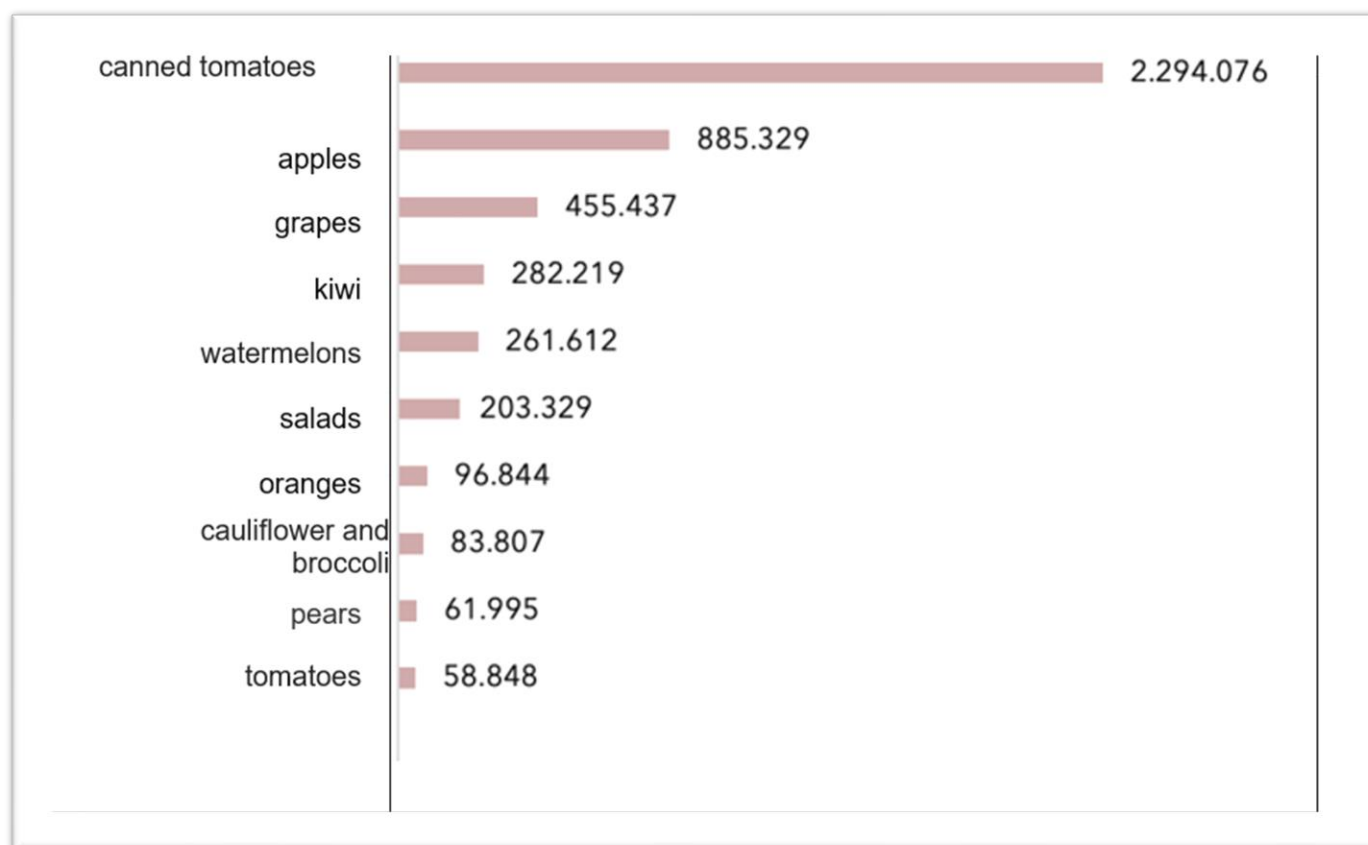
Fig. 2.1: Top 10 fruit and vegetables exported in 2022 (Values, '000 Euro)



Source: Centro Studi Divulga elaborations on Ismea data

In line with what was recorded for exported values, canned tomatoes are in first place for exported volumes with just under 2.3 million tons, apples in second position with 885,000 tons and grapes in third position with 455,000 tons. Followed by: kiwis (282 thousand), watermelons (262 thousand), salads (203 thousand), oranges (97 thousand), cauliflower and broccoli (84 thousand), pears (62 thousand), tomatoes (59 thousand) and shelled hazelnuts (22 thousand).

Fig. 2.2: Top 10 fruit and vegetable products exported in 2022 (Volumes, tons)



Source: Centro Studi Divulga elaborations on Ismea data

3.



3. The European framework, the main competitors

Italy holds important records in the EU for exported quantities of canned tomatoes, apples, kiwis and shelled hazelnuts, while it ranks second regarding the export of watermelons, after Spain in first place.

Starting from the export of canned tomatoes, Italy with just under 2.3 million tons leads the European ranking followed at a considerable distance by Spain with 566,000 tons and Portugal in third position with 340,000 tons. Greece immediately off the podium with 102,000 tons exported and the Netherlands in fifth

place with 78 thousand tons. It is the same situation for apples, with Italy gaining first place in the EU for exports with 885,000 tons crossing national borders, followed by Poland (733,000 tons), France (342,000 tons), the Netherlands (174,000 tons) and Belgium (161 thousand tons).

Also for European exports of grapes, Italy ranks first among EU countries with 455,000 tons of exports, followed by the Netherlands (373,000 tons), and in third position by Spain (176,000 tons). Greece and Germany in fourth and fifth position with respectively 49 thousand and 24 thousand tons.

Fig. 3.1: Italy's positioning compared to the main EU competitors (in volumes, tons)

	<i>Canned tomatoes</i>	<i>Ton C000)</i>	<i>Apples</i>	<i>Ton ('000)</i>	<i>Grapes</i>	<i>Ton ('000)</i>	<i>Watermelons</i>	<i>Ton C000)</i>	<i>Kiwi</i>	<i>Ton ('000)</i>	<i>Shelled hazelnuts</i>	<i>Ton ('000)</i>
<i>EU 27</i>		3,538.5		2,797.0		1,157.3		1,488.3		764.6		40.87
1st	ITALY	2294.1	ITALY	885.3	ITALY	455.4	Spain	680.9	ITALY	282.2	ITALY	22.4
2nd	Spain	566.3	Poland	732.7	Netherlands	373.3	ITALY	261.6	Greece	185.3	Netherlands	7.1
3rd	Portugal	340.3	France	342.5	Spain	176.6	Greece	191.7	Belgium	169.5	Germany	6.4
4th	Greece	102.8	Netherlands	174.0	Greece	48.7	Netherlands	137.5	Netherlands	45.6	Czech Republic	1.2
5th	Netherlands	78.0	Belgium	161.9	Germany	23.7	France	76.3	Portugal	30.2	Spain	1.0

Source: Centro Studi Divulga elaboration (ITC-Trademap)

Continuing with the analysis on the fruit and vegetable export front, the results recorded for the export of kiwis are noteworthy, with Italy representing the leading EU country for exports with 282,000 tons, followed by Greece with 185,000 tons and Belgium with 169 thousand tons. At a distance the Netherlands (46,000 tons) and Portugal (30,000 tons).

Italy is also the first EU exporting country of shelled hazelnuts with 22,000 tons, followed by the Netherlands (7,000 tons) and Germany (6,000 tons). The Czech Republic and Spain close the top five with respectively 1.2 and 1 thousand tons.

The performance of watermelon exports is also important with 261,000 tons, placing the country in second place in the EU ranking preceded only by Spain with 681,000 tons. Followed by Greece (192,000 tons), the Netherlands (137,000 tons) and France (76,000 tons).

For salads (lettuce and chicory) and cauliflower and broccoli, Italy instead gains third place with 116,000 tons exported in the first case and 83,000 tons in the second case. The main competitors for salads on foreign markets are Spain with 790,000 tons and the Netherlands with 160,000 tons. Regarding cauliflower and broccoli, Italy is preceded for quantities exported by Spain with around 400,000 tons and France with 108,000 tons.

Fifth and sixth place in the EU regarding the export of oranges and pears with respectively 96,000 and 61,000 tons. For oranges, Spain leads the European ranking (1.6 million tons) followed by the Netherlands (330,000 tons), Greece (266,000 tons) and Portugal (126,000 tons). For pears, however, the first place in EU exports is assigned to the Netherlands with 416,000 tons followed by Belgium (337,000 tons), Portugal (118,000 tons), Poland (108,000 tons) and Spain (103,000 tons).

Fig. 3.2: Italy's positioning compared to the main EU competitors (in value, millions)

	Canned tomatoes	Euro (mil)	Apples	Euro (mil)	Grapes	Euro (mil)	Watermelons	Euro (mil)	Kiwi	Euro (mil)	Shelled hazelnuts	Euro (mil)
EU27		3,797.3		2,126.3		2,243.07		1,003.24		1,504.31		290.59
1st	ITALY	2476	ITALY	881	Netherlands	860	Spain	510	ITALY	521	ITALY	167
2nd	Spain	581	France	390	ITALY	714	ITALY	158	Belgium	515	Germany	46
3rd	Portugal	333	Poland	301	Spain	391	Netherlands	127	Greece	215	Netherlands	45
4th	The Netherlands;	98	Netherlands	191	Greece	67	Greece	72	Netherlands	110	Czech Republic	7
5th	Greece	78	Spain	94	Germany	58	France	62	Portugal	52	Spain	7

Source: Centro Studi Divulga elaboration (ITC-Trademap)

In terms of value, Italy's positioning follows volumes, with Italy's first place for canned tomatoes (2.5 billion Euro), apples (880 million Euro), kiwis (521 million Euro) and shelled hazelnuts (167 million Euro). The primacy of canned tomato exports concerns not only European borders, but is also confirmed by analysing global data with Italian exports of 2.5 billion dollars, ahead of China (918 million) and Spain (586 million). This is roughly half of the total volume of business worldwide.

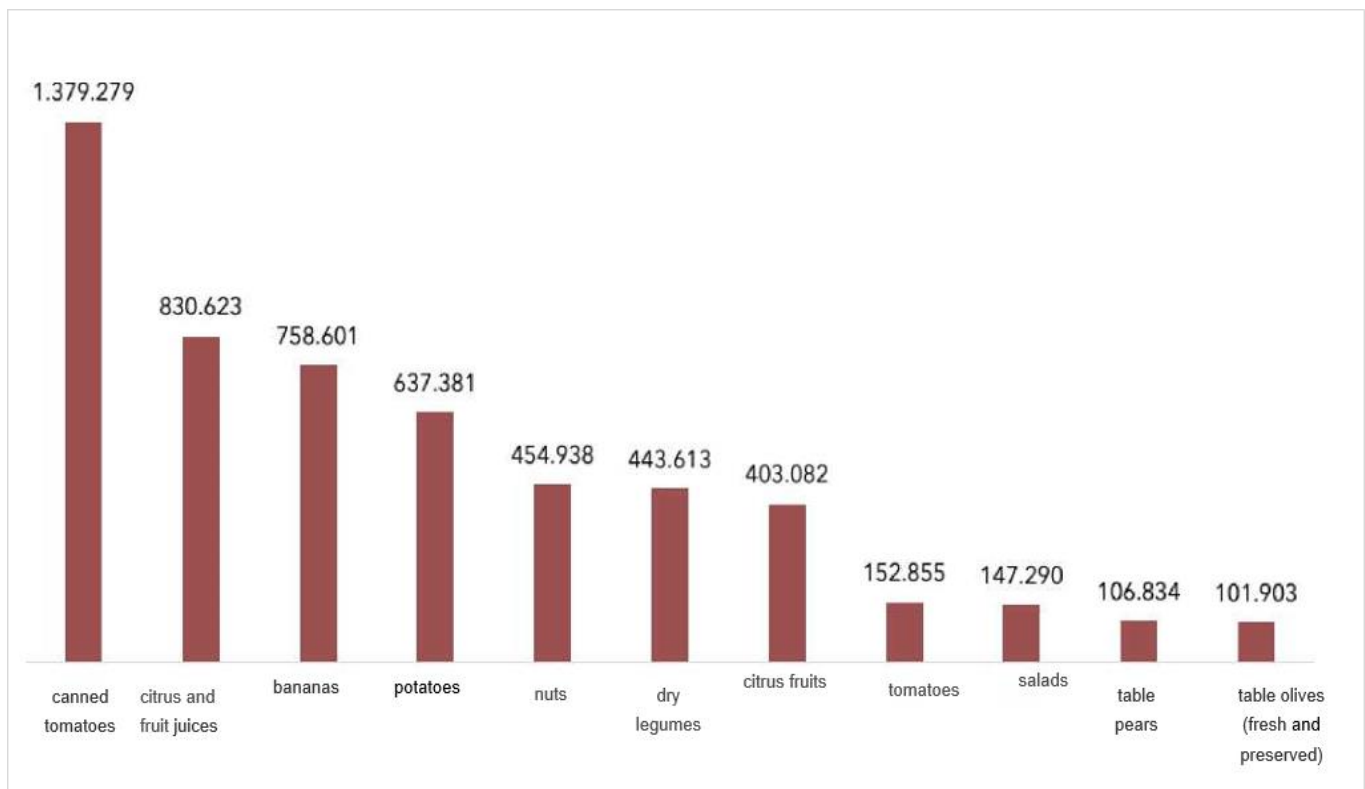
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4. What we import

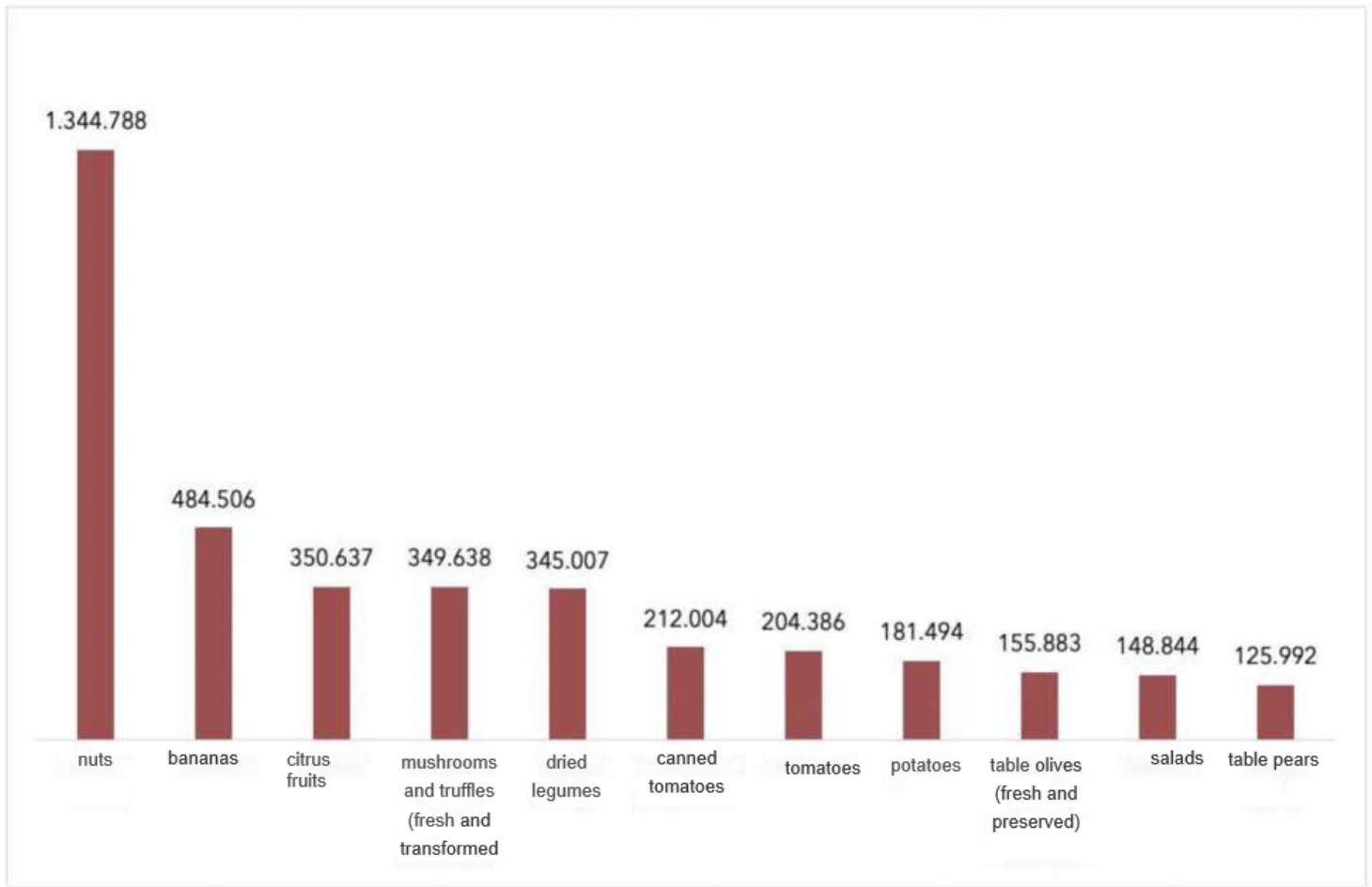
Among the main fruit and vegetable products imported from Italy we find in first place canned tomatoes with 1.38 million tons, followed by fruit and citrus juices with 830 thousand tons (expressed in coefficient quantity of equivalent product). Closing the podium are imports of bananas with 758,000 tons, which precede potatoes with 637,000 tons by a short distance.

Fig. 4.1: Main fruit and vegetable imports Italy
(tons - coefficiented quantity, 2022)



Source: Centro Studi Divulga elaborations on Ismea data

In value, however, among the main products imported into national borders, we find nuts with over 1.34 billion Euro, of which 75% shelled such as hazelnuts (328 million Euro) and almonds (266 million Euro). In second place are bananas with a value of 485 million Euro and in third place are citrus fruits with 351 million. Closely followed by mushrooms and truffles (both fresh and processed) and dried legumes, with respectively 350 million and 345 million Euro.



Source: Centro Studi Divulga elaborations on Ismea data

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