

Apple production in Italy

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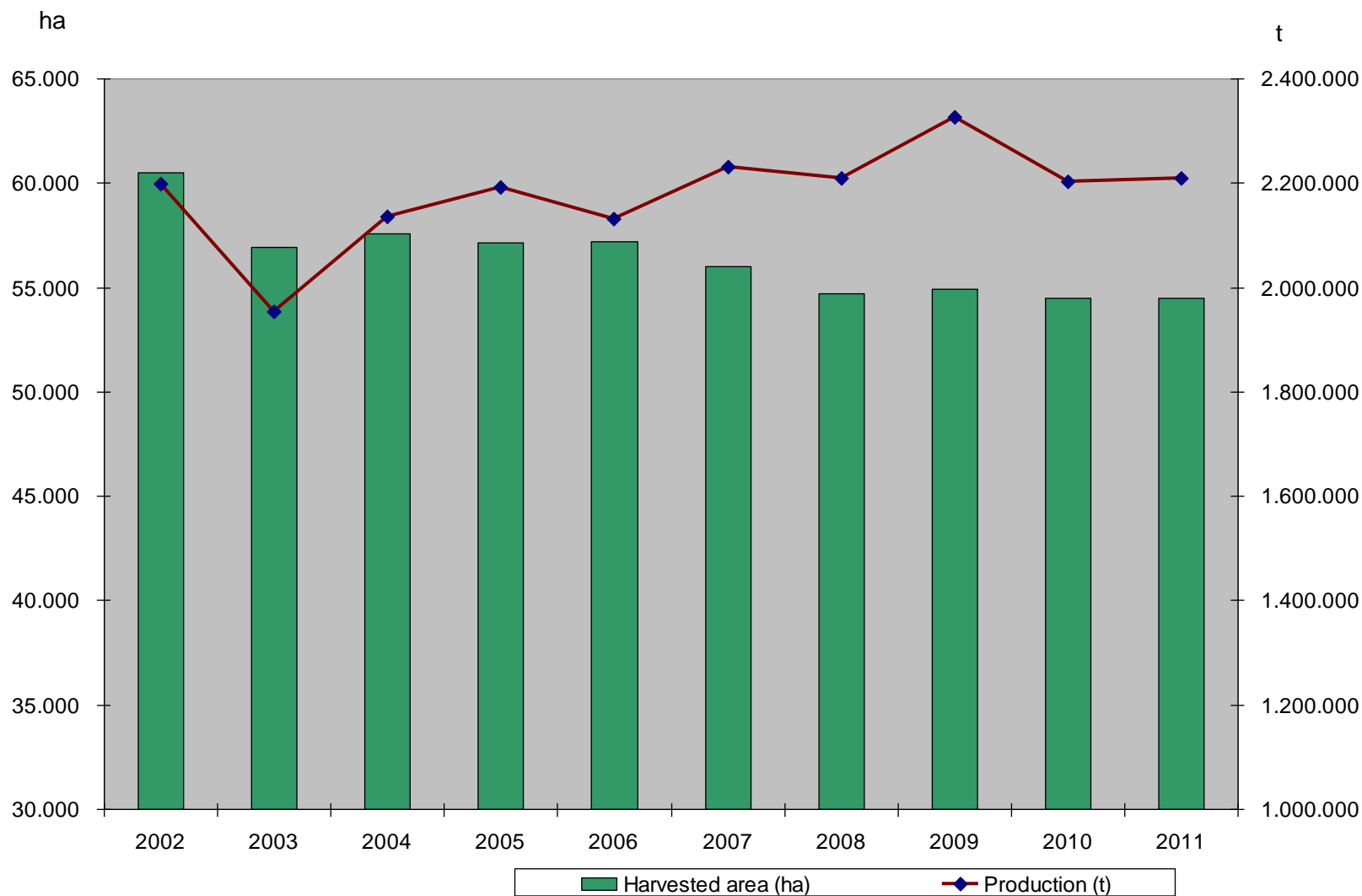
Apple production around the globe (2011)

	Countries	Harvested Area (Ha)
1	China	2,052,175
2	India	289,100
3	Russian Federation	188,000
4	Poland	183,526
5	Turkey	142,408
6	United States of America	133,789
7	Iran (Islamic Republic of)	133,395
8	Pakistan	110,411
9	Ukraine	105,200
10	North Korea	72,800
11	Uzbekistan	70,000
12	Belarus	60,102
13	Italy	56,860
14	Mexico	56,845
15	Republic of Moldova	55,790
16	Romania	52,722
17	Serbia	48,000
18	Argentina	42,394
19	France	41,867
20	Algeria	40,978

	Countries	Production (t)
1	China	35,986,667
2	United States of America	4,275,108
3	India	2,891,000
4	Turkey	2,680,075
5	Poland	2,493,078
6	Italy	2,411,201
7	France	1,857,349
8	Iran (Islamic Republic of)	1,651,839
9	Brazil	1,338,995
10	Russian Federation	1,200,000
11	Chile	1,169,092
12	Argentina	1,115,951
13	Ukraine	954,100
14	Germany	898,448
15	South Africa	781,124
16	Uzbekistan	779,000
17	North Korea	752,300
18	Spain	670,264
19	Japan	655,300
20	Mexico	630,533

Source: FAO

Apple production in Italy (2002-2011)



Source: Istituto Nazionale di Statistica

Important apple varieties in Italy

Variety	Harvested production (t)	
	2011	2012
Golden Delicious	1,020,794	898,243
Red Delicious	253,311	192,300
Gala	319,313	277,448
Granny Smith	121,652	96,297
Braeburn	102,219	76,515
Fuji	164,012	132,052
Cripps Pink	91,807	65,520
Other	219,654	200,639
TOTAL	2,292,762	1,939,014

Source: Assomela

Apple production in Italian regions (2011)

	Harvested area		Harvested production		Average yield (t/ha)
	(ha)	(%)	(t)	(%)	
Trentino Alto Adige / Südtirol	27,469	50.43	1,492,278	67.52	54.33
<i>Autonomous Province of Bolzano/Bozen</i>	17,969	32.99	988,000	44.70	54.98
<i>Autonomous Province of Trento</i>	9,500	17.44	504,278	22.82	53.08
Veneto	5,993	11.00	177,272	8.02	29.58
Emilia-Romagna	4,424	8.12	142,210	6.43	32.15
Piedmont	4,760	8.74	139,201	6.30	29.24
Campania	3,426	6.29	70,669	3.20	20.63
Others	8,393	15.4	188,430	8.53	22.45
TOTAL	54,465	100.00	2,210,060	100.00	40.58

Source: Istituto Nazionale di Statistica

Structure of apple growing holdings in selected Italian regions (2010)

		Size of farm's agricultural area (ha)						TOTAL	Ø ha/ farm
		> 0 to < 1	1 to < 3	3 to < 5	5 to <10	10 to < 20	>= 20		
Autonomous Province of Bolzano / Bozen	Holdings, nr	1.908	2.314	1.527	1.208	257	64	7,278	2.55
	%	26.22%	31.79%	20.98%	16.60%	3.53%	0.88%	100.00%	
	Apple area, ha	820.41	3,455.91	4,581.20	6,087.56	2,082.35	1,513.03	18,540.46	
	%	4.42%	18.64%	24.71%	32.83%	11.23%	8.16%	100.00%	
Autonomous Province of Trento	Holdings, nr	1.975	2.018	981	653	163	74	5,864	1.84
	%	33.68%	34.41%	16.73%	11.14%	2.78%	1.26%	100.00%	
	Apple area, ha	849.16	2,844.37	2,772.87	2,845.95	969.90	515.31	10,797.56	
	%	7.86%	26.34%	25.68%	26.36%	8.98%	4.77%	100.00%	
Piedmont	Holdings, nr	664	1.465	855	988	603	405	4,980	0.96
	%	13.33%	29.42%	17.17%	19.84%	12.11%	8.13%	100.00%	
	Apple area, ha	72.09	399.06	437.50	871.88	1,338.21	1,674.90	4,793.64	
	%	1.50%	8.32%	9.13%	18.19%	27.92%	34.94%	100.00%	
Veneto	Holdings, nr	326	638	401	676	516	372	2,929	2.03
	%	11.13%	21.78%	13.69%	23.08%	17.62%	12.70%	100.00%	
	Apple area, ha	36.10	237.54	350.82	1,315.12	1,810.61	2,206.91	5,957.10	
	%	0.61%	3.99%	5.89%	22.08%	30.39%	37.05%	100.00%	
Emilia-Romagna	Holdings, nr	144	551	560	1.041	928	723	3,947	1.14
	%	3.65%	13.96%	14.19%	26.37%	23.51%	18.32%	100.00%	
	Apple area. ha	15.94	187.88	278.61	737.41	1,140.29	2,154.73	4,514.86	
	%	0.35%	4.16%	6.17%	16.33%	25.26%	47.73%	100.00%	

Source: 6° Agricultural Census

Two typical farm models

- Alpine areas
 - Smaller size
 - More specialised
 - Higher yields
- Po valley areas
 - Bigger farm size
 - Less specialised (apples cultivated together with other fruit)
 - Lower yields

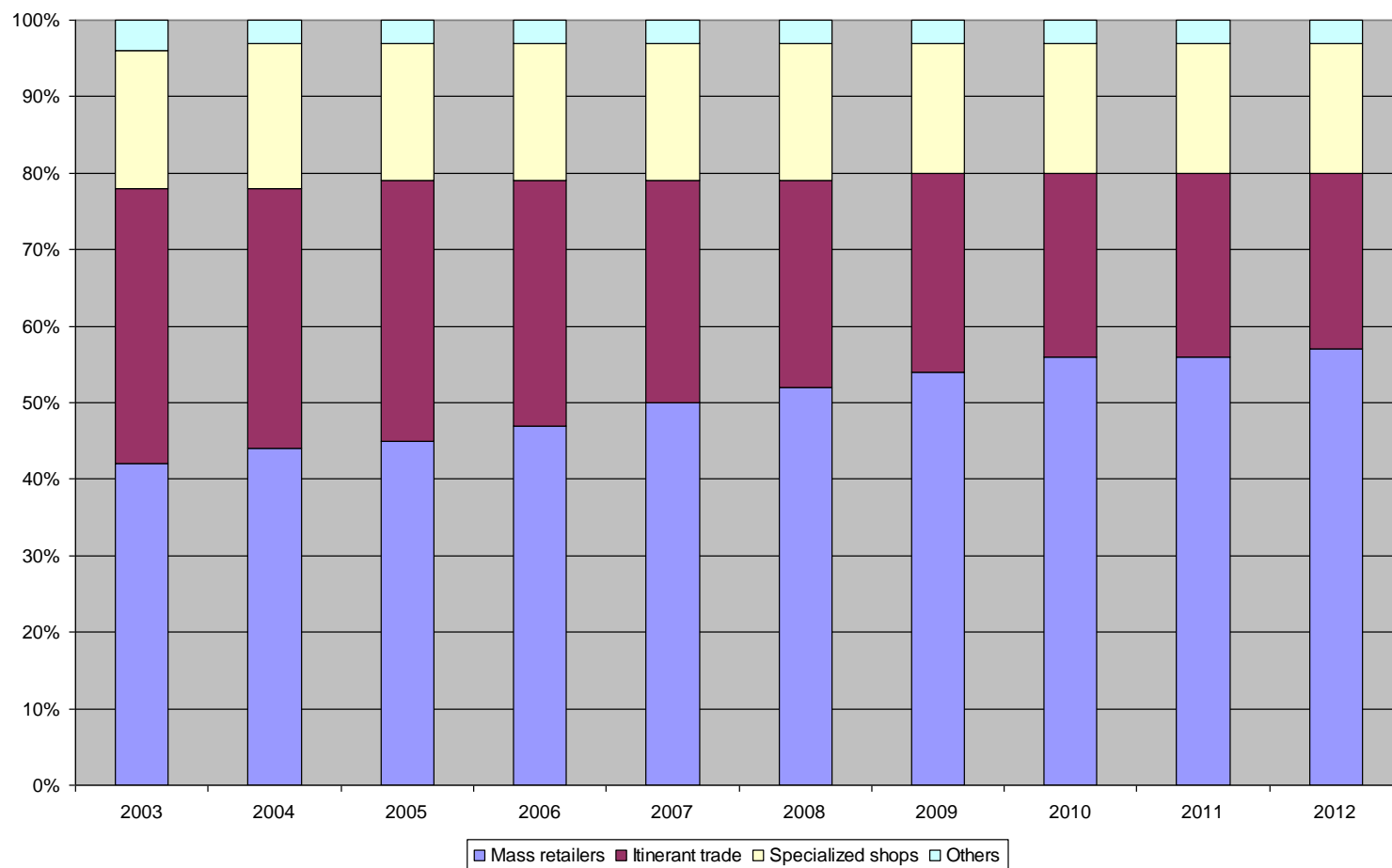
Typical farm M1

- Region: Emilia Romagna
- Size: 5ha apples (+ 5 ha other fruits)
- Varieties: Pink Lady, Fuji, Gala, Modi
- Marketing: apple production and other fruits sold to a co-operative

Typical farm M2

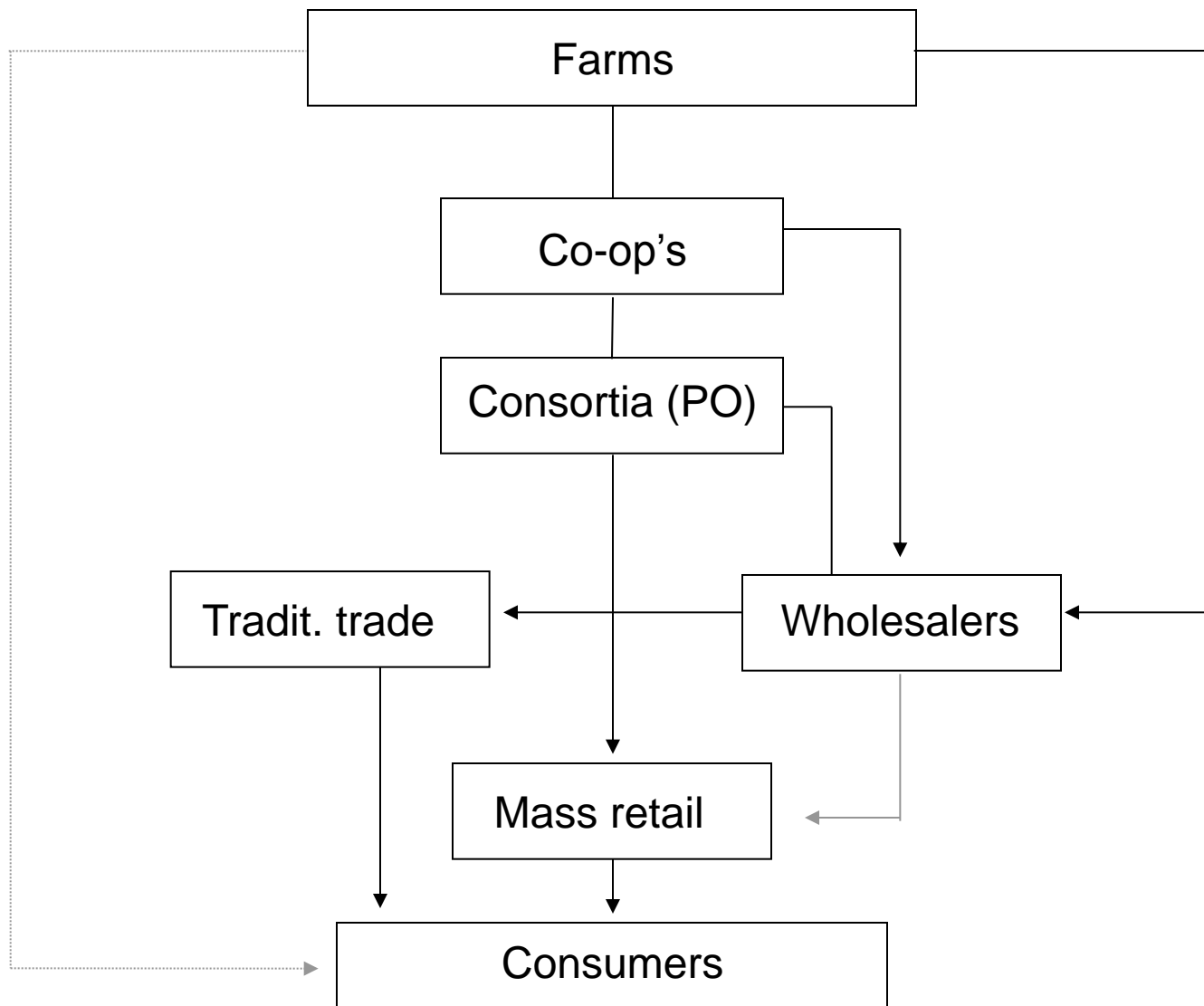
- Region: Autonomous Province of Trento
- Size: 2.5ha apples
- Varieties: Golden Delicious, Red Delicious, Gala, other variety
- Marketing: apple production sold to a co-operative

Distribution channels for fruits and vegetables in Italy (% of value)



Source: CSO, Report Ortofrutta 2012

Structure of the Italian apple market



Current developments regarding apple production in Italy

- Certification schemes
- Safety (dir 2009/128)
- Decrease of internal consumption (2003-2012 -> -15%)
- Concentration of supply (as a response of concentration of retail and Common Market Organisation)
- Inter-regional cooperation for marketing (FROM) and for “new” varieties (NOVAMELA)

Interesting questions and challenges for the future

- Search for new varieties
 - resistance
 - nutraceutical (functional/healthy food)
 - market appeal (size, form, colour, sugar content)