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GAIN Report #IT0033

## Italy

## Strawberries

## Annual

## 2000

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**Report Highlights:** This report updates our Annual Report IT0013 of 3/14/2000. Italian strawberry production in 2001 is anticipated at 102,000 tons, or 2 percent less than in 2000, continuing its downward trend. Planted area continues to decline, due to both high labor costs and strong competition from Spain in the major European import markets. Exports are expected to drop further, while imports, mainly from Spain continue to grow.

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
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## SECTION I. SITUATION AND OUTLOOK

Italian strawberry area is expected to continue its downward trend next year, even after the 3 percent drop reported in 1999 and the 4 percent decline in 2000. This reduction pertains to both open air cultivation, prevailing in northern regions, and covered cultivation, which is more common in the south. As a result, fresh strawberry production in 2001 is expected to drop to only 102,000 tons, although much will depend on weather developments in the next months, particularly in the spring of 2001.

As reported previously, this gradual reduction of planted area in Italy can be attributed to both high labor costs and aggressive competition from Spain in Italy as well as in other EU markets. As a matter of fact, Italy has lost its leadership in the European strawberry market, and there are no indications of a substantial recovery in the medium term. On the contrary, high labor costs (exacerbated by compulsory social security contributions) are prompting many farmers to switch to other, less labor intensive horticultural crops, for which competition is less significant.

Domestic growers' prices in 2000 averaged even less than the already disappointing levels of both 1998 and 1999. The market situation was particularly depressed in May, when high temperatures reported all over Italy suddenly increased the supply on both domestic and export markets, and badly affected fruit quality. The average domestic grower prices of fresh strawberries during the last years were as follows (lire/kilogram):

Years	April	May	June
1996	3,820	3,196	2,415
1997	3,286	2,485	2,502
1998	3,041	3,111	2,302
1999	3,408	3,049	2,268
2000	3,066	2,767	2,375

Source: ISMEA

Exports of Italian fresh strawberries decreased further in both 1999 and 2000, due, as said above, to strong competition from Spain in major European markets. During January-June 2000 exports totaled only 30,358 tons, or 27 percent less than the same period of 2000. Germany (56 percent of the total), Austria (16 percent), and Switzerland (15 percent) absorbed, as usual, most of the Italian shipments.

Imports, on the other hand, continue to grow, particularly in early spring, when domestic supplies are not yet available. During January-June 2000, imports totaled 24,302 tons (19 percent more than in the first half of 1999), of which 67 percent from Spain and 22 percent from France. Imports from the United States are virtually non-existent. Trade in frozen strawberries remains marginal.

## SECTION II. PSD TABLES

## STRAWBERRIES

PSD Table						
Country	Italy					
Commodity	Fresh Strawberries			(HA)(MT)		
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Area Planted	4970	4927	4800	4709	0	4600
Area Harvested	4970	4927	4800	4709	0	4600
TOTAL Production	110000	109600	120000	104500	0	102000
Imports, Fresh	24000	22750	20000	27000	0	28000
TOTAL SUPPLY	134000	132350	140000	131500	0	130000
Exports, Fresh	47000	45824	50000	38000	0	37000
Domestic Fresh Market	77000	76526	77000	82500	0	81000
For Processing	10000	10000	13000	11000	0	12000
TOTAL UTILIZATION	134000	132350	140000	131500	0	130000

## FROZEN STRAWBERRIES

PSD Table						
Country	Italy					
Commodity	Frozen Strawberries				(MT)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Deliv. To Processors	10000	10000	13000	11000	0	12000
Beginning Stocks	0	0	0	0	0	0
Production	10000	10000	13000	11000	0	12000
Imports	8400	7720	7000	7000	0	8000
TOTAL SUPPLY	18400	17720	20000	18000	0	20000
Exports	2800	2523	4000	2000	0	2000
Domestic Consumption	15600	15197	16000	16000	0	18000
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	18400	17720	20000	18000	0	20000

## TRADE MATRIXES

## FRESH STRAWBERRIES

## Imports

Import Trade Matrix			
Country	Italy		
Commodity	Fresh Strawberries		
Time period	CY	Units:	MT
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
France	3181	France	6237
Belgium	203	Belgium	174
Netherlands	1395	Netherlands	1229
Germany	221	Germany	401
Spain	11602	Spain	14231
Total for Others	16602		22272
Others not Listed	165		478
Grand Total	16767		22750

## Exports

Export Trade Matrix			
Country	Italy		
Commodity	Fresh Strawberries		
Time period	CY	Units:	MT
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
France	1248	France	700
Belgium	206	Belgium	315
Netherlands	1152	Netherlands	802
Germany	33601	Germany	26788
U.K.	1181	Spain	852
Denmark	1173	Denamrk	982
Austria	6346	Austria	6896
Sweden	1128	Sweden	957
Croatia	370	Croatia	153
Switzerland	5716	Switzerland	6024
Total for Others	52121		44469
Others not Listed	1338		1355
Grand Total	53459		45824

## FROZEN STRAWBERRIES

## Imports

Import Trade Matrix			
Country	Italy		
Commodity	Frozen Strawberries		
Time period	CY	Units:	MT
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
France	1572	France	1148
Germany	878	Germany	1152
Netherlands	238	Netherlands	629
Spain	1427	Spain	2080
Turkey	785	Turkey	927
Poland	438	Poland	246
Total for Others	5338		6182
Others not Listed	966		1538
Grand Total	6304		7720

Exports

Export Trade Matrix			
Country	Italy		
Commodity	Frozen Strawberries		
Time period	CY	Units:	MT
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
France	2847	France	1444
Germany	1543	Germany	452
U.K.	76	U.K.	3
Total for Others	4466		1899
Others not Listed	2693		624
Grand Total	7159		2523