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Italy

Fresh Deciduous Fruit

Semi-Annual

2003

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Report Highlights: Italian deciduous fruit production data were revised as follows: apple and table grape figures were significantly reduced for 2002 because heavy rainfalls and hail storms have affected crops. Concentrated apple juice output in 2002 was also revised downwards due to a lack of raw material. For fresh pears total production was slightly revised downward but commercial production is forecast to be 1% higher at 860,000 tons.

Includes PSD changes: Yes
Includes Trade Matrix: No
Semi-Annual Report
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EXECUTIVE SUMMARY

Since the last fresh deciduous fruit report prepared in August, 2002 production data were revised as follows. Apple and table grape figures were significantly reduced for 2002 because heavy rainfalls and hail storms have affected crops during the latter part of the producing season. Italian apple and table grape cultivation areas are quite far apart: apples in the north, table grapes in the south, mostly in Sicily and Apulia. Nevertheless during last summer unfavorable weather conditions exceptionally affected almost all Italian regions including southern Italian regions.

Furthermore apples cultivated in the Trentino-Alto Adige region grew to a smaller size, or 1-2 millimeters smaller than average due to exceptionally high temperatures reported in June. The Trentino-Alto Adige region accounts for approximately two thirds of Italian apple crops. This also contributed to effects in the juice sector. Concentrated apple juice output in 2002 was also revised downwards due to a lack of raw material.

For fresh pears total production was revised slightly downward although commercial production in 2002 is forecast to be 1% higher at 860,000 tons. Italian pear output was definitely less significantly affected by hail than we expected and reported in August 2002.

Most of Italian pear planted areas differ from Italian apple areas. The major Italian pear producing region is Emilia-Romagna, in north-central Italy whereas the above mentioned apple area, the Trentino Alto-Adige region is close to the Austrian border.

Italian apple exports in 2001/02 were 659,000 tons, much more than expected. Exports are forecast to remain consistent in 2002/03 due to low output in most European countries. Concentrated apple juice imports are forecast to decline in 2002 due to a recovery in domestic supply whereas exports, however, should increase.

Italian pear imports in 2001/02 equaled exports due to a low domestic output. About 40% of total Italian pear imports were supplied by Argentina. In 2002/03 Italian pear exports are forecast to increase due to a larger supply whereas imports should maintain in the same level, around 100,000 tons.

Italian table grape exports for 2002 have been revised downward due to the drop in production discussed above. Export prices for Italian table grapes during the 2002 marketing season averaged 1.06 Euros per Kg, or 6% more than in 2001.

PSD TABLES

FRESH APPLES

PSD Table						
Country	Italy					
Commodity	Fresh Apples				(HA)(1000 TREES)(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Area Planted	69000	69000	67000	67000	67000	66000
Area Harvested	63000	63000	62000	62000	62000	62000
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	0	0	0	0	0	0
Commercial Production	2217000	2217000	2172000	2172000	2324000	2170000
Non-Comm. Production	50000	50000	48000	48000	46000	40000
TOTAL Production	2267000	2267000	2220000	2220000	2370000	2210000
TOTAL Imports	33000	33000	27500	52000	20000	55000
TOTAL SUPPLY	2300000	2300000	2247500	2272000	2390000	2265000
Domestic Fresh Consump	1363000	1363000	1280000	1232500	1350000	1235000
Exports, Fresh Only	527000	527000	574000	659000	610000	660000
For Processing	390000	390000	383000	370000	400000	370000
Withdrawal From Market	20000	20000	10500	10500	30000	0
TOTAL UTILIZATION	2300000	2300000	2247500	2272000	2390000	2265000

CONCENTRATED APPLE JUICE

PSD Table						
Country	Italy					
Commodity	Concentrated Apple Juice				(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Deliv. To Processors	390000	390000	383000	370000	400000	370000
Beginning Stocks	0	0	0	0	0	10000
Production	71000	71000	65000	62000	0	60000
Imports	35000	35000	35000	45000	0	40000
TOTAL SUPPLY	106000	106000	100000	107000	0	110000
Exports	102000	102000	96000	92000	0	95000
Domestic Consumption	4000	4000	4000	5000	0	5000
Ending Stocks	0	0	0	10000	0	10000
TOTAL DISTRIBUTION	106000	106000	100000	107000	0	110000

FRESH PEARS

PSD Table						
Country	Italy					
Commodity	Fresh Pears				(HA)(1000 TREES)(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		07/2000		07/2001		07/2002
Area Planted	47000	47000	47000	47000	46000	47000
Area Harvested	44000	44000	43000	43000	43000	43000
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total Trees	0	0	0	0	0	0
Commercial Production	895000	895000	793000	793000	850000	860000
Non-Comm. Production	45000	45000	47000	47000	60000	45000
TOTAL Production	940000	940000	840000	840000	910000	905000
TOTAL Imports	94000	94000	119000	130000	100000	100000
TOTAL SUPPLY	1034000	1034000	959000	970000	1010000	1005000
Domestic Fresh Consump	776000	776000	743000	749000	765000	765000
Exports, Fresh Only	138000	138000	126000	131000	135000	135000
For Processing	110000	110000	90000	90000	110000	105000
Withdrawal From Market	10000	10000	0	0	0	0
TOTAL UTILIZATION	1034000	1034000	959000	970000	1010000	1005000

FRESH TABLE GRAPES

PSD Table						
Country	Italy					
Commodity	Fresh Table Grapes				(HA)(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Area Planted	74000	74000	74000	73000	74000	73000
Area Harvested	73000	73000	73000	72000	73000	72000
Commercial Production	1570000	1570000	1530000	1258000	1560000	1560000
Non-Comm. Production	58000	58000	50000	50000	40000	40000
TOTAL Production	1628000	1628000	1580000	1308000	1600000	1600000
TOTAL Imports	12000	12000	12000	20000	12000	12000
TOTAL SUPPLY	1640000	1640000	1592000	1328000	1612000	1612000
Domestic Fresh Consump	693000	693000	672000	640000	677000	677000
Exports, Fresh Only	667000	667000	650000	600000	665000	665000
For Processing	280000	280000	270000	88000	270000	270000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	1640000	1640000	1592000	1328000	1612000	1612000

Euro:US\$ 2002

July	August	September	October	November
1.01	1.02	1.002	1.02	1.00