FONDAZIONE EDISON

Confagricoltura

ITALY'S STRENGTHS IN AGRICULTURE:

A LEADING PRODUCER OF VEGETABLE PRODUCTS IN EUROPE AND THE WORLD

2020-2021 EDITION

ITALIAN AGRICULTURAL PRODUCTION OUTSTANDING IN EUROPE AND AT GLOBAL LEVEL

The publication of this statistical report on the strengths of Italian agriculture and specifically of the fruit and vegetable sector marks the beginning of a collaboration between Confagricoltura and Fondazione Edison.

This partnership is very important to us.
We consider Fondazione's analysis and studies a reliable support of our organization's initiatives in a very complex period, but at the same time full of opportunities to be seized.

The report lists the Italian leading agricultural products. At the European level we hold the top position for added value among main producers countries in fruits and vegetables, but also in wine, rice and durum wheat sector. Furthermore, the quality of our products is considered to be outstanding at global level

The agri-food supply chain, from farm to the final consumer, is the largest supply chain in Italy with an annual turnover of approximately 540 billion euros, meaning about 25% of gross domestic product.
We are proud of these results, but we are also convinced that we still have a huge potential to be exploited.

The domestic self-sufficiency rate is estimated to be around 75%, and in terms of value our exports, roughly 45 billion euros per year, are lower than those of France, Germany and Spain. These Countries on the other hand, as indicated in the report, register a lower added value of agriculture compared to Italy.

Some obstacles we face are of absolute evidence and they have to be removed in order to increase production, regain positions on the internal market and reinforce our presence at international level.

To mention a few of those obstacles, a transport system that reduces the competitiveness of our products *vis-à-vis* our competitors, the lack of integration within the supply chain, a complex dialogue between the scientific and business worlds, despite the high quality of our researchers at world level.

Our sector has been suffering from the absence of a national strategic vision for too long.

A national agricultural policy that can implement in an efficient way the guidelines defined at Brussels level is still missing In the current debate we tend to confront environmental and economic sustainability as if increasing agricultural production could automatically lead to increased pollution, further pressure on natural resources and decline of biodiversity.

Technological innovations – from biotechnologies to precision farming – may contribute to limit the carbon footprint of production processes in agriculture, keeping, at the same time, the efficiency and competitiveness of our companies.

Not forgetting, moreover, the growing role that our sector can play in the field of renewable energies to meet the environmental objectives set at international level.

The health emergency has shown that Italy can count on a solid agri-food system. Supplies have always been guaranteed. But we have to keep going forward. Once the pandemic is over, we cannot go back to where we started. There is the potential to growth, to innovate and to create qualified jobs.

A greater awareness of our strengths, combined with actions that enhance our many *excellences*, most of which still unknown, could represent the essential element that is missing from our agri-food policy.

Lot of work is still to be done, also in terms of analyses and projects.

In this perspective, the collaboration with Edison Foundation could be an important asset.

Massimiliano Giansanti
President of Confagricoltura

VEGETABLES, FRUIT AND CEREALS: THE LEADING ROLE OF ITALIAN AGRICULTURE

In recent years Italy has undergone significant modernization in its areas of international production specialization. In manufacturing Italy has led the revolution in interior and home product design; it has conquered substantial market share in fashion and luxury products; it has strengthened hundreds of hi-tech niches in machinery-transport equipment and pharmaceuticals; and it has become a world leader in processed food products and wine.

But agriculture has also undergone fundamental modernization; it has grown and enhanced the value particularly of high-end vegetable products, which has enabled Italy to become the leading agricultural producer in Europe.
Indeed, from 2008 to 2019 Italy was the rather stable leader in the sector on a European Union level, almost always ahead of its rival France, at times by a small margin.
This also occurred in 2019: Eurostat estimated the value added of Italian agriculture at 31.8 billion euros. This figure enables Italy to retain its leading position in the EU, ahead of France (31.3 billion), Spain (26.6 billion) and Germany (21.1 billion).

Italy generates nearly one-fifth of the entire value added of EU agriculture: of an estimated total of 188.7 billion euros in 2019, Italy contributes 16.8% whereas France's share is 16.6%, Spain 14.1% and Germany 11.2%. It is important to consider that the value added generated in Italy originates with agricultural production that is high in quality and quantity, with relatively limited subsidies.

Indeed, Italian agriculture is the least subsidized of all major European countries both in absolute terms and in relation to value added, as reported by the Italian statistical office (ISTAT).

Regarding this last point, we should point out that in 2019 the total amount of agricultural subsidies on production in the EU was around 53 billion euros. In absolute values, the country which received the largest amount of agricultural subsidies (including national and European Union subsidies) was France with 7.9 billion, followed by Germany with 6.9 billion and Spain with 5.6 billion.

In Italy the agricultural sector received 5.0 billion. Therefore, of the major EU agricultural producers, the ratio between subsidies on production and value added is the lowest in Italy.
In 2019 this ratio was 32.7% in Germany, 25.1% in France, 21.2% in Spain and just 15.8% in Italy, compared to the EU average of 28.1%.

Italian agriculture boasts numerous products of excellence in the vegetable products and animal products. In particular, "Made in Italy" products which are part of the Mediterranean and Italian diet – vegetables, fruit and cereals – play a major role not only in the national agricultural sector but also on a European and in some cases even on global level.

For example, Italy is the world's top producer in the cultivation of artichokes, fennel bulbs, turnip greens, wine grape and bergamot, thanks to the contribution of regions such as Apulia, Sicily, Sardinia, Campania, Lazio, Tuscany, Veneto and Calabria. Italians are also the world's leading per capita consumers of these products.

An analysis conducted by Fondazione Edison of the main crops reveals that for 42 agricultural products, Italy is one of the 3 top producers in the European Union, in stiff competition with Spain and France. More in detail: Italy is the top EU producer of 17 products, the second biggest producer for 20 and the third biggest for another 5.

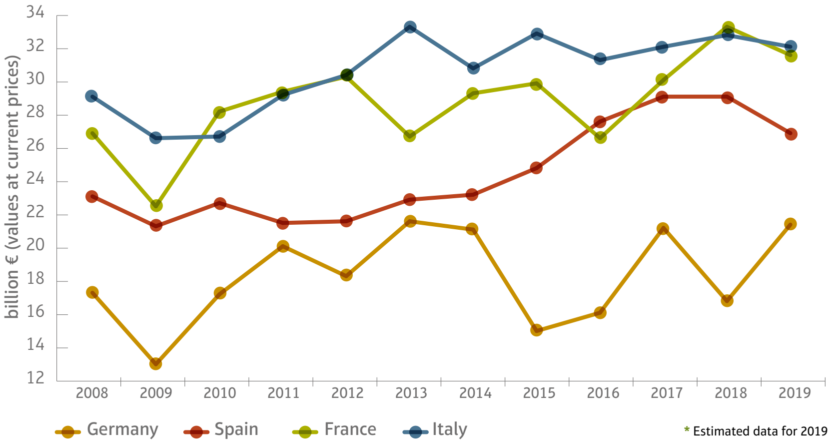
Italy is the EU's top producer of many vegetables typical of the Mediterranean and Italian diet, including tomatoes for processing, eggplants, artichokes, chicory for fresh consumption, endives, fennel bulbs and turnip greens. And for fruit Italy also excels in many important crops: from fresh apples and pears to apricots and grapes for table and wine, from kiwis to bergamot and hazelnuts. Italy is also the top EU producer of durum wheat and rice.

Furthermore, Italy is the EU's second biggest producer of lettuces, celery, cauliflower and broccoli, spinach, courgettes and marrows, garlic, fresh beans, chickpeas, lentils and other fresh pulses. It is also second in the production of peaches, nectarines, plums, muskmelons watermelons, yellow lemons, oranges, clementines, olives, almonds, chestnuts and strawberries (grown in greenhouses).

Finally, Italy holds third place in Europe for the production of asparagus, sweet peppers and hot peppers, radishes, as well as cherries and figs.

Marco Fortis
Director of Fondazione Edison

VALUE ADDED IN AGRICULTURE OF THE MAJOR EUROPEAN COUNTRIES (2008 - 2019*)



* Estimated data for 2019

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

EUROPEAN AGRICULTURE: VALUE ADDED AND SUBSIDIES

(year 2019)

	SUBSIDIES ON PRODUCTION (billion €)	SUBSIDIES ON PRODUCTION / GROSS VALUE ADDED (percentage values)
EU 28	53.0	28.1
FRANCE	7.9	25.1
GERMANY	6.9	32.7
SPAIN	5.6	21.2
ITALY	**5.0**	**15.8**

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat; Istat, Andamento dell'economia agricola. Anno 2019, 20 May 2020

ITALY IS THE **FIRST** EU PRODUCER OF…

(year 2019)

- TOMATOES FOR PROCESSING
- EGGPLANTS
- ARTICHOKES
- CHICORY FOR FRESH CONSUMPTION
- ENDIVES
- FENNEL AND OTHER ROOTS, TUBERS AND BULBS N.E.C.
- TURNIP GREENS AND OTHER BRASSICAS N.E.C.
- APPLES FOR FRESH CONSUMPTION
- PEARS FOR FRESH CONSUMPTION
- APRICOTS
- GRAPES FOR TABLE USE
- GRAPES FOR WINES
- KIWIS
- BERGAMOT AND OTHER CITRUS FRUITS N.E.C.
- HAZELNUTS
- DURUM WHEAT
- RICE

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

ITALY IS THE **SECOND** EU PRODUCER OF…

(year 2019)

- LETTUCES
- CELERY
- CAULIFLOWER AND BROCCOLI
- SPINACH
- COURGETTES AND MARROWS
- GARLIC
- FRESH BEANS

- CHICKPEAS, LENTILS AND OTHER FRESH PULSES N.E.C.
- PEACHES
- NECTARINES
- PLUMS
- MUSKMELONS
- WATERMELONS
- YELLOW LEMONS

- ORANGES
- CLEMENTINES
- OLIVES
- ALMONDS
- CHESTNUTS
- STRAWBERRIES (GROWN IN GREENHOUSES)

2nd

TOTAL 20

SECOND POSITIONS

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

ITALY IS THE **THIRD** EU PRODUCER OF…

(year 2019)

ASPARAGUS	RADISHES	FIGS
PEPPERS (CAPSICUM)	CHERRIES	

3rd

TOTAL 5

THIRD POSITIONS

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF VEGETABLES

THE LARGEST EU PRODUCERS OF VEGETABLES
(year 2019, thousands of tons)

TOMATOES FOR PROCESSING

1	**ITALY**	**4,729**
2	SPAIN	3,139
3	PORTUGAL	1,441

EGGPLANTS

1	**ITALY**	**301**
2	SPAIN	245
3	ROMANIA	80

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2019, thousands of tons)

ARTICHOKES

1	ITALY	379
2	SPAIN	200
3	FRANCE	38

CHICORY FOR FRESH CONSUMPTION

1	ITALY	272
2	FRANCE	254
3	NETHERLANDS	53

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF VEGETABLES
(year 2019, thousands of tons)

ENDIVES

1	**ITALY**	**198**
2	SPAIN	69
3	FRANCE	55

LETTUCES

1	SPAIN	1,005
2	**ITALY**	**487**
3	GERMANY	234

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2019, thousands of tons)

CELERY		
1	SPAIN	115
2	**ITALY**	**98**
3	UNITED KINGDOM	54

CAULIFLOWER AND BROCCOLI		
1	SPAIN	708
2	**ITALY**	**368**
3	POLAND	283

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2019, thousands of tons)

SPINACH		
1	FRANCE	123
2	**ITALY**	**100**
3	BELGIUM	93

ASPARAGUS		
1	GERMANY	131
2	SPAIN	59
3	**ITALY**	**50**

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2019, thousands of tons)

COURGETTES AND MARROWS

1	SPAIN	606
2	**ITALY**	**569**
3	FRANCE	119

PEPPERS (CAPSICUM)

1	SPAIN	1,402
2	NETHERLANDS	375
3	**ITALY**	**250**

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2019, thousands of tons)

GARLIC

1	SPAIN	271
2	**ITALY**	**29**
3	FRANCE	28

RADISHES

1	GERMANY	111
2	FRANCE	45
3	**ITALY**	**31**

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2019, thousands of tons)

FRESH BEANS

1	FRANCE	338
2	**ITALY**	**154**
3	SPAIN	143

CHICKPEAS, LENTILS AND OTHER FRESH PULSES N.E.C.

1	SPAIN	57
2	**ITALY**	**48**
3	FRANCE	37

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2019, thousands of tons)

FENNEL AND OTHER ROOTS, TUBERS AND BULBS N.E.C.

1	**ITALY**	**524**
2	UNITED KINGDOM	152
3	POLAND	147

TURNIP GREENS AND OTHER BRASSICAS N.E.C.

1	**ITALY**	**252**
2	SPAIN	117
3	GERMANY	107

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF FRUITS

THE LARGEST EU PRODUCERS OF FRUITS

(year 2019, thousands of tons)

APPLES FOR FRESH CONSUMPTION

1	ITALY	2,304
2	POLAND	2,281
3	FRANCE	1,364

PEARS FOR FRESH CONSUMPTION

1	ITALY	429
2	NETHERLANDS	373
3	BELGIUM	332

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF FRUITS
(year 2019, thousands of tons)

PEACHES		
1	SPAIN	941
2	ITALY	810
3	GREECE	775

NECTARINES		
1	SPAIN	605
2	ITALY	415
3	GREECE	152

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF FRUITS

(year 2019, thousands of tons)

APRICOTS

1	ITALY	273
2	SPAIN	146
3	FRANCE	135

CHERRIES

1	POLAND	196
2	SPAIN	119
3	ITALY	99

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF FRUITS

(year 2019, thousands of tons)

GRAPES FOR TABLE USE		
1	ITALY	1,009
2	SPAIN	314
3	GREECE	273

GRAPES FOR WINES		
1	ITALY	6,854
2	FRANCE	5,442
3	SPAIN	5,430

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF FRUITS

(year 2019, thousands of tons)

PLUMS

1	ROMANIA	693
2	**ITALY**	**215**
3	FRANCE	205

FIGS

1	SPAIN	52
2	GREECE	20
3	**ITALY**	**12**

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF FRUITS
(year 2019, thousands of tons)

MUSKMELONS

1	SPAIN	660
2	**ITALY**	**592**
3	FRANCE	248

WATERMELONS

1	SPAIN	1,200
2	**ITALY**	**650**
3	ROMANIA	463

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF FRUITS

(year 2019, thousands of tons)

KIWIS		
1	ITALY	524
2	GREECE	286
3	FRANCE	56

YELLOW LEMONS		
1	SPAIN	883
2	ITALY	446
3	GREECE	82

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF FRUITS

(year 2019, thousands of tons)

	ORANGES		CLEMENTINES	
1	SPAIN	3,227	SPAIN	953
2	**ITALY**	**1,650**	**ITALY**	**632**
3	GREECE	849	GREECE	151

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF FRUITS

(year 2019, thousands of tons)

OLIVES

1	SPAIN	5,965
2	**ITALY**	**2,194**
3	GREECE	1,228

BERGAMOT AND OTHER CITRUS FRUITS N.E.C.

1	**ITALY**	**31**
2	GREECE	21
3	SPAIN	1

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF FRUITS

(year 2019, thousands of tons)

HAZELNUTS

1	**ITALY**	**99**
2	SPAIN	12
3	FRANCE	12

ALMONDS

1	SPAIN	340
2	**ITALY**	**77**
3	PORTUGAL	34

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF FRUITS

(year 2019, thousands of tons)

CHESTNUTS		
1	SPAIN	189
2	ITALY	40
3	PORTUGAL	36

STRAWBERRIES (GROWN IN GREENHOUSES)		
1	SPAIN	349
2	ITALY	90
3	GREECE	73

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

THE LARGEST EU PRODUCERS OF CEREALS TYPICAL OF MEDITERRANEAN DIET

THE LARGEST EU PRODUCERS OF CEREALS TYPICAL OF MEDITERRANEAN DIET

(year 2019, thousands of tons)

DURUM WHEAT		
1	ITALY	3,996
2	FRANCE	1,548
3	SPAIN	737

RICE		
1	ITALY	1,493
2	SPAIN	779
3	GREECE	221

Source: compiled by Fondazione Edison and Confagricoltura on data from Eurostat

This booklet has been compiled by Marco Fortis, with the collaboration of Stefano Corradini and Andrea Sartori (Fondazione Edison)

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