

A close-up photograph of several artichokes with their characteristic green, pointed leaves and a central fennel bulb with its feathery green fronds. The background is a soft-focus image of a white fennel bulb and its fronds.

ITALY'S STRENGTHS IN AGRICULTURE:

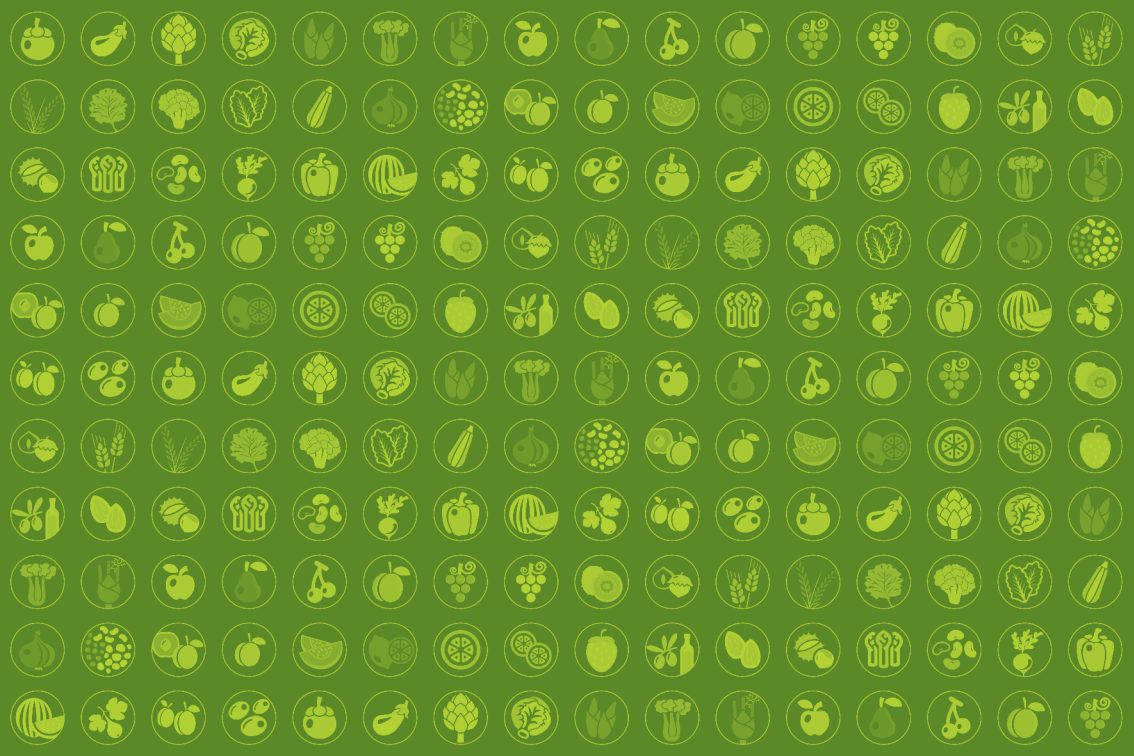
A LEADING PRODUCER
OF VEGETABLE PRODUCTS
IN EUROPE AND THE WORLD



FONDAZIONE
EDISON

20th
ANNIVERSARY
1999-2019

A close-up photograph of a cluster of bright red cherry tomatoes still attached to their green vine. The tomatoes are densely packed and have a glossy surface.



On the occasion of its twentieth anniversary (1999-2019), Fondazione Edison has found it useful to publish a series of special booklets analyzing the strengths of the Italian economy, while at the same time considering Italy's significant problems and gaps.

These booklets, including this one, deal with significant macroeconomic and sectorial aspects and are intended to provide experts as well as laymen with data and objective analysis to improve the overall knowledge of the Italian socio-economic system.



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ITALIAN AGRICULTURE - THE LEADER IN EUROPE IN TERMS OF VALUE AND QUALITY

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 on the Old Continent.

Indeed, from 2008 to 2018 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, apart from the difficult years of 2010 and 2011.

This also occurred last year: Eurostat estimated the value added of Italian agriculture at 32.2 billion euros. This figure enables Italy to retain its leading position in the EU, ahead of France (32.1 billion), Spain (30.2 billion) and Germany (16.8 billion).

Italy generates nearly one-fifth of the entire value-added of EU agriculture: of an estimated total of 182.3 billion euros in 2018, Italy contributes 17.7% whereas France's share is 17.6%, Spain's 16.6% and Germany 9.2%. 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 2017 the total amount of agricultural subsidies on production in the EU was around 51 billion euros. In absolute values, the country which received the largest amount of agricultural subsidies (including national and European Union subsidies) was France with 8.2 billion, followed by Germany with 6.7 billion and Spain with 5.7 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 2017 this ratio was 33.1% in Germany, 27.9% in France, 20.4% in Spain and just 15.8% in Italy, compared to the EU average of 27.6%.

ITALIAN AGRICULTURAL PRODUCTION EXCELS IN EUROPE AND THE WORLD

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 global level, as in the case of artichokes and fennel.

In the cultivation of artichokes, for example, Italy is the world’s top producer thanks to the contribution of regions such as Puglia, Sicily, Sardinia, Campania, Lazio but also Liguria, Tuscany and Veneto.

Italians are also the world’s leading per capita consumers of artichokes.

An analysis conducted by Fondazione Edison of the main crops reveals that for 41 agricultural products, Italy is one of the 3 top producers in the European Union, in stiff competition with Spain and France (Eurostat data for 2017). More in detail: Italy is the top EU producer of 17 products, the second biggest producer for 16 and the third biggest for another 8.

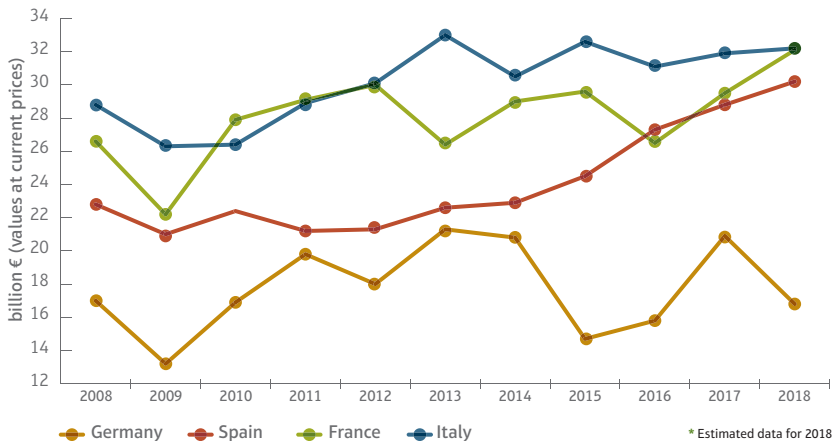
Italy is the EU's top producer of many vegetables typical of the Mediterranean and Italian diet, including tomatoes, eggplants, artichokes, fresh chicory, endives, celery and fennel. And for fruit Italy also excels in many important crops: from fresh apples and pears to cherries, from apricots to table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

Italy is also the top EU producer of durum wheat and rice.

Furthermore, Italy is the EU's second biggest producer of lettuces, cauliflower and broccoli, spinach, courgettes and marrows, garlic, chickpeas, lentils and other fresh pulses.






It is also second in the production of peaches, nectarines, muskmelons, yellow lemons, oranges, clementines, strawberries (grown in greenhouses), olives for oil, almonds and chestnuts. Finally, Italy holds third place in Europe for the production of asparagus, radishes, sweet peppers and hot peppers, fresh beans, watermelons, figs, plums and olives for table use.

VALUE ADDED IN AGRICULTURE OF THE MAJOR EUROPEAN COUNTRIES (2008 - 2018*)




















EUROPEAN AGRICULTURE: VALUE ADDED AND SUBSIDIES

(year 2017)

	SUBSIDIES ON PRODUCTION (billion €)	SUBSIDIES ON PRODUCTION / GROSS VALUE ADDED (percentage values)
 UE 28	51.0	27.6
 FRANCE	8.2	27.9
 GERMANY	6.7	33.1
 SPAIN	5.7	20.4
 ITALY	5.0	15.8

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







(year 2017)

 TOMATOES	 FENNEL AND OTHER ROOTS, TUBERS AND BULBS	 GRAPES FOR WINES
 EGGPLANTS	 APPLES FOR FRESH CONSUMPTION	 KIWIS
 ARTICHOKES	 PEARS FOR FRESH CONSUMPTION	 HAZELNUTS
 CHICORY FOR FRESH CONSUMPTION	 CHERRIES	 DURUM WHEAT
 ENDIVES	 APRICOTS	 RICE
 CELERY	 GRAPES FOR TABLE USE	



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

(year 2017)

 LETTUCES	 PEACHES	 STRAWBERRIES (GROWN IN GREENHOUSES)
 CAULIFLOWER AND BROCCOLI	 NECTARINES	 OLIVES FOR OIL
 SPINACH	 MUSKMELONS	 ALMONDS
 COURGETTES AND MARROWS	 YELLOW LEMONS	 CHESTNUTS
 GARLIC	 ORANGES	
 CHICKPEAS, LENTILS AND OTHER FRESH PULSES	 CLEMENTINES	



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

(year 2017)



ASPARAGUS



FRESH BEANS



PLUMS



RADISHES



WATERMELONS



OLIVES FOR TABLE USE



PEPPERS (CAPSICUM)



FIGS








THE LARGEST EU PRODUCERS OF VEGETABLES

THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2017, thousands of tons)

TOMATOES		EGGPLANTS			
1	 ITALY	5,573	1	 ITALY	286
2	 SPAIN	5,163	2	 SPAIN	226
3	 PORTUGAL	1,748	3	 ROMANIA	78





THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2017, thousands of tons)

ARTICHOKES		CHICORY FOR FRESH CONSUMPTION			
1	 ITALY	388	1	 ITALY	256
2	 SPAIN	223	2	 FRANCE	153
3	 FRANCE	45	3	 NETHERLANDS	55

THE LARGEST EU PRODUCERS OF VEGETABLES

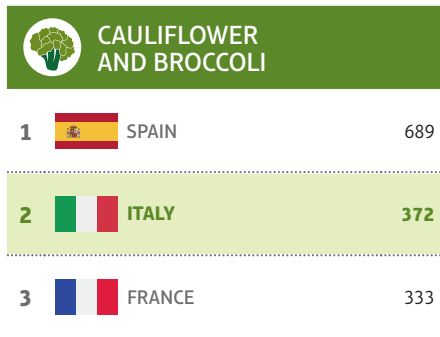
(year 2017, thousands of tons)

 ENDIVES		
1	 ITALY	205
2	 SPAIN	69
3	 FRANCE	55

 LETTUCES		
1	 SPAIN	976
2	 ITALY	327
3	 GERMANY	226

THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2017, thousands of tons)




THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2017, thousands of tons)



SPINACH

1  FRANCE 109

2  ITALY 92


3  BELGIUM 81



ASPARAGUS

1  GERMANY 131

2  SPAIN 63

3  ITALY 46



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(year 2017, thousands of tons)



COURGETTES AND MARROWS


1  SPAIN 587

2  ITALY 541


3  FRANCE 116



PEPPERS (CAPSICUM)

1  SPAIN 1,278

2  NETHERLANDS 370

3  ITALY 173



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THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2017, thousands of tons)



GARLIC

1



SPAIN

275

2



ITALY

30

3



ROMANIA

29



RADISHES

1



GERMANY

117

2



FRANCE

49

3



ITALY

31



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THE LARGEST EU PRODUCERS OF VEGETABLES


(year 2017, thousands of tons)



FRESH BEANS


1  FRANCE 397


2  SPAIN 164

3  ITALY 155



CHICKPEAS, LENTILS AND OTHER FRESH PULSES

1  SPAIN 59

2  ITALY 45

3  FRANCE 41







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THE LARGEST EU PRODUCERS OF VEGETABLES

(year 2017, thousands of tons)


 FENNEL AND OTHER ROOTS, TUBERS AND BULBS			
1		ITALY	513
2		UNITED KINGDOM	181
3		POLAND	178



THE LARGEST EU PRODUCERS OF FRUITS

THE LARGEST EU PRODUCERS OF FRUITS

(year 2017, thousands of tons)

APPLES FOR FRESH CONSUMPTION		PEARS FOR FRESH CONSUMPTION			
1	 ITALY	1,912	1	 ITALY	773
2	 POLAND	1,643	2	 NETHERLANDS	330
3	 FRANCE	1,315	3	 SPAIN	319

THE LARGEST EU PRODUCERS OF FRUITS

(year 2017, thousands of tons)









THE LARGEST EU PRODUCERS OF FRUITS

(year 2017, thousands of tons)

APRICOTS		CHERRIES			
1	 ITALY	266	1	 ITALY	118
2	 SPAIN	163	2	 SPAIN	114
3	 FRANCE	159	3	 POLAND	91

THE LARGEST EU PRODUCERS OF FRUITS

(year 2017, thousands of tons)

GRAPES FOR TABLE USE		GRAPES FOR WINES			
1	 ITALY	926	1	 ITALY	6,441
2	 GREECE	310	2	 SPAIN	5,119
3	 SPAIN	267	3	 FRANCE	4,976

THE LARGEST EU PRODUCERS OF FRUITS

(year 2017, thousands of tons)



PLUMS

1



ROMANIA

434

2



FRANCE

211

3



ITALY

207



FIGS

1



SPAIN

36

2



GREECE

14

3



ITALY

11



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THE LARGEST EU PRODUCERS OF FRUITS

(year 2017, thousands of tons)



MUSKMELONS

1  SPAIN 656

2  ITALY 606

3  FRANCE 287



WATERMELONS

1  SPAIN 1,113

2  GREECE 647

3  ITALY 571



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(year 2017, thousands of tons)



THE LARGEST EU PRODUCERS OF FRUITS

(year 2017, thousands of tons)



ORANGES

1  SPAIN 3,357

2  ITALY 1,536

3  GREECE 961



CLEMENTINES

1  SPAIN 1,215

2  ITALY 650

3  GREECE 175



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(year 2017, thousands of tons)



OLIVES FOR TABLE USE

1  SPAIN 505

2  GREECE 151

3  ITALY 73



OLIVES FOR OIL

1  SPAIN 6,031

2  ITALY 2,538

3  GREECE 858











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THE LARGEST EU PRODUCERS OF FRUITS

(year 2017, thousands of tons)

 HAZELNUTS			
1		ITALY	131
2		FRANCE	12
3		SPAIN	10

 ALMONDS			
1		SPAIN	244
2		ITALY	80
3		GREECE	22

THE LARGEST EU PRODUCERS OF FRUITS

(year 2017, thousands of tons)



CHESTNUTS

1



SPAIN

156

2



ITALY

37

3



GREECE

36



STRAWBERRIES (GROWN IN GREENHOUSES)

1



SPAIN

357

2



ITALY

92

3



GREECE

57



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THE LARGEST EU PRODUCERS OF CEREALS TYPICAL OF MEDITERRANEAN DIET

THE LARGEST EU PRODUCERS OF CEREALS TYPICAL OF MEDITERRANEAN DIET

(year 2017, thousands of tons)

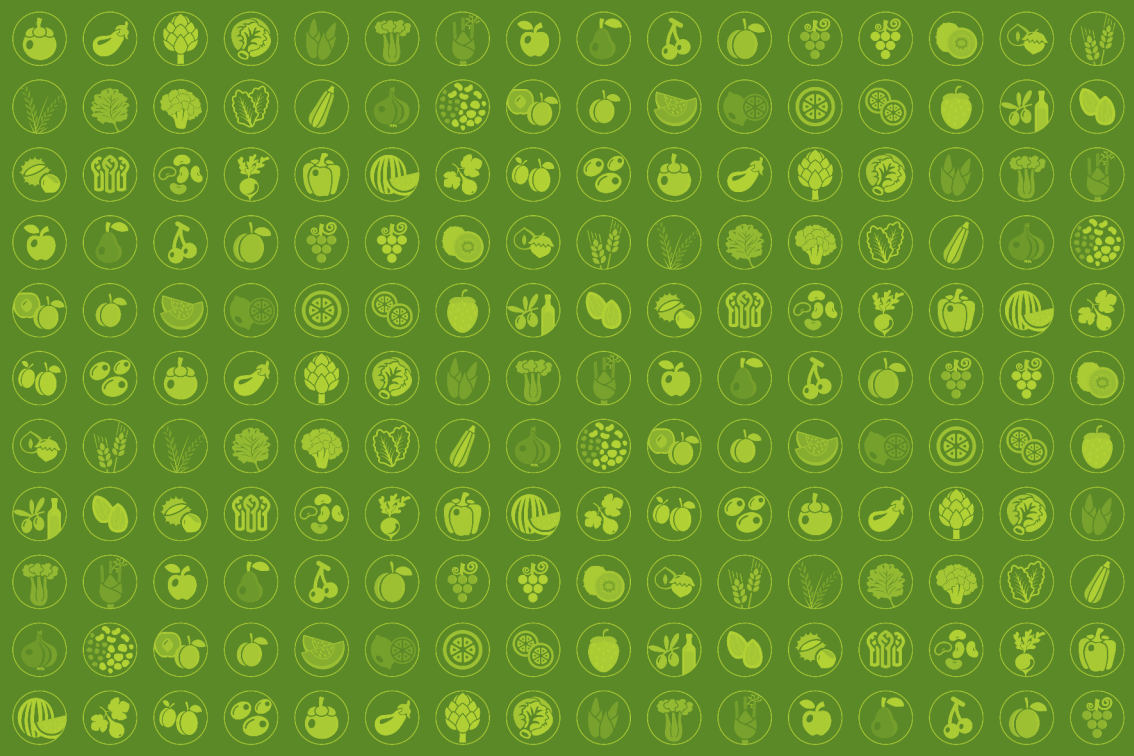
 DURUM WHEAT		 RICE			
1	 ITALY	4,374	1	 ITALY	1,504
2	 FRANCE	2,094	2	 SPAIN	826
3	 SPAIN	1,111	3	 PORTUGAL	180

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

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