

## CBI MARKET SURVEY

# THE FRESH FRUIT AND VEGETABLES MARKET IN ITALY

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### Report summary

This market survey presents, among other things, the following highlights for the fresh fruit and vegetables market in Italy:

- Italy has the largest consumption of fresh fruit and vegetables in the EU. Although consumption decreased from 2001 to 2003 due to high retail prices, the retail prices have decreased and consumption is now picking up again.
- Domestic production of fruit and vegetables cannot fulfil domestic demand and imports are therefore high.
- Italy is the fifth largest importer of fruit and vegetables in the EU. From 2001 to 2005, imports of fruit and vegetables have increased and developing countries have benefited greatly.
- Italy imports both exotic and off-season fruit and vegetables. Bananas, pineapples, artichokes and beans are the most popular products imported from developing countries.

The survey provides exporters of fresh fruit and vegetables with sector-specific market information related to gaining access Italy. By focusing on a specific country, this document provides additional information, complementary to the more general information and data provided in the CBI market survey 'The fresh fruit and vegetables market in the EU', which covers the EU in general. That survey also contains an overview and explanation of the selected products dealt with, some general remarks on the statistics used, as well as information on other available documents for this sector. It can be downloaded from <http://www.cbi.nl/marketinfo>.

## 1. Market description: consumption and production

### Consumption

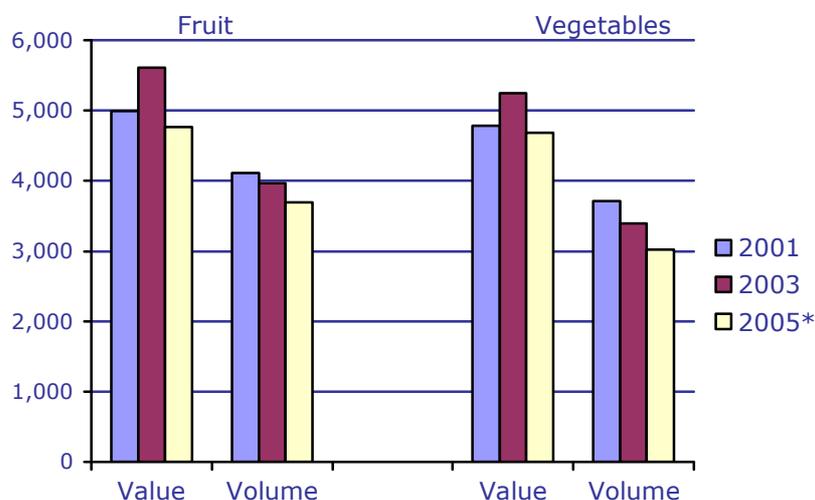
#### **Total market size**

In 2004, total household purchases of fresh fruit in Italy were 3.8 million tonnes with a value of €5.2 billion (Figure 1.1).<sup>1</sup> Fruit sales decreased more than 3% in volume from 2001 to 2003, while value increased by 12%. An important reason for this was the increase in retail prices of fruit. The reason for this increase is difficult to identify but Italian consumers tend to blame the introduction of the euro. Faced with declining sales volumes and dissatisfied customers, retail prices went down again in 2004 and 2005. Household sales of vegetables in 2005 were 3.4 million tonnes with a value of €5.3 billion (Figure 1.1). Retail prices of vegetables have also increased considerably since 2001, but these remained high in 2005.

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<sup>1</sup> These figures may differ from figures in the CBI market survey Fresh fruit and vegetables in the EU. In the CBI market surveys covering individual countries national sources are preferred for providing the most detailed information, while the general survey uses statistics that are easily comparable between countries.

**Figure 1.1 At-home consumption of fresh fruit and vegetables in Italy, 2001-2005, value in million euro (€), volume in thousand tonnes**



\*Data until October 2005.

Source: CSO Centro Ortofrutticole 2005.

**Product groups**

Apples are the most popular fruit, accounting for 19% of Italian fruit household sales in 2004 (Table 1.1). Oranges account for 15%, followed by bananas (10%), pears (9%) and peaches (6%). According to ISMEA (2006), exotic fruit sales other than bananas amounted to 35 thousand tonnes in 2004, an increase of 21% compared to 2000. Pineapples are the major product in this category. Value sales of exotic fruit (excluding bananas) amounted to €56 million, an increase of 27% compared to 2000.

**Table 1.1 At-home consumption of fresh fruit in Italy, 2004-2005, in thousand tonnes**

	2004	2005*
<b>Total fruit</b>	<b>3,830</b>	<b>3,692</b>
Apples	735	702
Oranges	588	543
Bananas	391	368
Pears	330	304
Peaches	238	224
Lemons	173	161
Tangerines	144	156
Kiwifruit	81	102
Grapes	102	101
Nectarines	94	94

\*Data until October 2005.

Source: CSO Centro Ortofrutticole 2005.

The most popular fresh vegetable in Italy is tomatoes, accounting for 18% of total domestic consumption volume in both 2000 and 2004. Lettuce is the second largest product with 14% of total volume of fresh vegetables. Other important products are courgette (8%), fennel (7%), sweet peppers (6%), eggplant (5%) and artichokes (5%). These vegetables are typical for the Italian cuisine and generally grown in Italy (ISMEA 2006).

### **Trends in consumption**

Italians are proud of their culinary culture and tradition. The most popular vegetables fit in this Italian culinary pattern. Although supermarkets and restaurants offer other types of food based on foreign traditions, the Italian consumer is very loyal to the local cuisine. There is a strong preference for domestically produced food. Italian consumers do appreciate tropical fruit, as reflected in the growing sales over the last years. Exotic vegetables are not easily accepted and the offer of these products in retail outlets is limited.

Like many other EU consumers, Italian consumers have become concerned about their health. Diet products such as low-fat products sell more than before. There is no specific government programme to promote the consumption of fruit and vegetables, but Italian consumers are aware of the health benefits and may be more prone to increase consumption. Although the issue of convenience is less important than in other EU countries, the demand for convenience products is likely to increase.

### **Production**

#### **Total production**

Italy is Europe's largest producer of both fresh fruits and fresh vegetables. Production of fresh fruit in 2005 was 20.4 million tonnes, which is 30% of total EU fruit production. Production volumes have fluctuated over the last 4 years. From 2001 to 2003, the volume decreased by 7%, while from 2003 to 2005 production increased by 25%. Production of vegetables in 2005 amounted to 15.5 million tonnes, which is 25% of total EU vegetable production. From 2001 to 2005, production of vegetables has increased by 8% (Table 1.2).

**Table 1.2 Production of fresh fruit and vegetables in Italy, per product group, 2001-2005, in thousand tonnes**

	<b>2001</b>	<b>2003</b>	<b>2005</b>		<b>2001</b>	<b>2003</b>	<b>2005</b>
<b>Total fruit</b>	<b>18,895</b>	<b>16,005</b>	<b>20,409</b>	<b>Total vegetables</b>	<b>14,353</b>	<b>13,885</b>	<b>15,482</b>
Total fruit excl. grapes	10,242	8,522	11,152				
Grapes	8,653	7,483	9,257	Tomatoes	6,529	6,652	7,815
Oranges	1,857	1,734	2,534	Lettuce	966	914	847
Apples	2,341	1,610	2,195	Carrots	591	571	642
Peaches and nectarines	1,708	1,176	1,740	Cauliflower	490	485	513
Pears	963	822	845	Pumpkins, squash, and gourds	424	469	506
Cantaloupes and other melons	443	580	665	Artichokes	505	392	470
Tangerines	613	497	662	Onions	426	357	379
Lemons and limes	574	520	609	Peppers	392	361	378
Watermelons	507	528	540	Eggplants	358	369	374
Kiwifruit	382	364	475	Cabbages	579	281	287
Stone fruit	496	359	554	Green beans	219	190	200
Strawberries	184	155	154	Other vegetables	2,875	2,844	3,072
Other citrus fruit	31	30	32				
Other fruit	141	147	146				

Source: FAOSTAT, 2006

### **Product groups**

Grapes are the main fruit produced in Italy, accounting for 46% of national production. Italy accounts for 35% of total EU production. Most of the grapes are used for making wine, while just a small percentage is consumed as table grapes. Grape production has increased by 7% since 2001. Other major products are oranges, apples, peaches and nectarines. Although Spain is widely known as a major citrus fruit producing country, in 2005 Italy produced more oranges than Spain. With 2.5 million tonnes of produced in 2005, Italy accounted for 51% of total orange production in the EU. In the same year, Spain produced 2.2 million tonnes. The Italian production increased from 2001 to 2005 by 36%. In 2003, citrus production was small because of the eruption of the volcano Etna, which covered Sicilian citrus trees with a layer of ash, and the very dry summer in the southern part of Italy. In 2005, the citrus harvest was exceptionally large because of favourable climatic conditions during flowering and ripening (USDA 2005a).

The main apple varieties are Golden and Red Delicious, but new varieties with a higher value such as Gala, Fuji and Pink Lady are gradually replacing them. Ninety five percent of apple production takes place in the north of Italy, where yields are higher than in the south due to more advanced production techniques and assistance to farmers in marketing (USDA 2005b). The production area is also nearer to the main markets in Germany and northwestern Europe.

Italy is Europe's largest producer of pears, apricots, peaches and nectarines and kiwi fruit. Kiwi fruit accounts for 4% of total fruit production excluding grapes, and its production increased by 24% from 2001 to 2005. Italy is becoming the major kiwi supplier to the other EU countries. The Italian climate allows for kiwi production out of the New Zealand season.

The production of vegetables has increased by 8% from 2001 to 2005. Like fruit, vegetable production experienced a decrease in 2003. The main product is tomatoes with a share of 50% in Italian vegetable production. Between 2001 and 2005, production increased by 20%. Italy is the largest tomato producer in the EU accounting for 40% of tomato production in the EU. Only 12% of the tomatoes is eaten fresh, the remainder is used for processing. The largest part of the processed tomatoes is canned, while the rest is used for production of tomato paste and sauces (Table 1.3) (USDA 2005c).

**Table 1.3 Production and use of tomatoes in Italy in 2004, in thousand tonnes**

	volume	% of total
for fresh consumption	770	12%
for processing	5,800	88%
for canning	3,300	50%
for paste production	1,834	28%
for sauce production	666	10%
Total	6,570	100%

Source: USDA 2005c

Other important products are lettuce, carrots, cauliflower, pumpkins and artichokes. Italy is responsible for 64% of EU eggplant production, 63% of artichoke, and 60% of pumpkin.

### **Forecast and trends in production**

Italy will remain an important producer of fruit and vegetables in the EU. Because of the presence of temperate climate in the north to sub-tropical climate in the far south, Italy has excellent conditions for production of a wide variety of fruits and vegetables.

### **Opportunities and threats**

Although Italy is a major producer of fruit itself, there are many opportunities for exporters from developing countries, especially in off-season and exotic fruit (see Chapter 2 on imports). For vegetables, counter-season production provides the best opportunities for developing country exporters.

### Useful sources

- ISMEA, Istituto di servizi per il mercato agricolo alimentare. <http://www.ismea.it>.
- CSO, Centro Servizi Ortofitticoli. [www.csoservizi.com/cso/portal/](http://www.csoservizi.com/cso/portal/).
- FAOSTAT, Statistics database FAO. <http://faostat.fao.org>.

## 2. Trade: imports and exports

### Imports

Italy occupies a mid position in the ranking of largest importers in the EU accounting for 6% of total EU import value of fruit and 5% of total EU import value of vegetables.

Between 2001 and 2005, fresh fruit imports increased by 9% in value and 13% in volume. In 2005, imports amounted to €1.1 billion and 1.5 million tonnes. 48% of import value is from other EU member states; 49% is from developing countries, a much higher share than in other EU countries. During the survey period, value imports from developing countries increased by 22% and volume by 30%. Intra-EU imports decreased by 1%, making Italy increasingly reliant on imports from outside of the EU. Spain is the largest supplier of fresh fruit to Italy, followed by Ecuador, France and Argentina (Table 2.1).

Imports of fresh vegetables were €476 million and 480 thousand tonnes in 2005, constituting an increase of 46% in value and 40% in volume compared to 2001. The share of imports from other EU member countries in total import value was 54% in 2005. Developing countries had a share of 13% in total import value (Table 2.1). The leading suppliers are Spain, accounting for 34% of total import value, France (20%) and the Netherlands (15%). From 2001 to 2005, imports from developing countries increased by an impressive 55% in value and 103% in volume.

**Table 2.1 Imports by Italy and leading suppliers to Italy, 2005, share in % of value**

	Leading suppliers 2005	Share	Import value
<b>Fruit</b>			
Intra EU:	Spain (22%), France (8%), Belgium (5%)	48%	543
Extra EU –DC*:	New Zealand (1.8%), Israel (1.2%)	3%	38
DC*:	Ecuador (16%), Argentina (7%), Costa Rica (6%), Chile (5%), South Africa (3.0%), Colombia (2.9%)	49%	550
<b>Vegetables</b>			
Intra EU:	Spain (34%), France (20%), The Netherlands (15%)	84%	400
Extra EU:	Bulgaria (1.2%), Israel (0.4%), Romania (0.4%)	3%	15
DC*:	Egypt (4.8%), Morocco (2.5%), China (1.3%), FJR Macedonia (1.0%), Serbia (0.8%), Argentina (0.6%)	13%	61

\*DC: Developing countries

Source: Eurostat 2006

### Fruit

The main fruits imported into Italy are bananas (33% of import value in 2005), pineapples (8%), pears and quinces (7%), and peaches and nectarines (6%).

The major products imported from developing countries are bananas, pineapples, pears and quinces, lemons and limes, and apples (Table 2.2). From 2001 to 2005, banana imports grew by 10% in value. However, total banana imports from developing countries increased by only 1%. Total import value of pineapples was stable, but imports from developing countries increased by 50%. Import value from developing countries of pears and quinces, lemons and limes increased, but it decreased for apples. Products not mentioned in Table 2.2 but with growing imports are oranges, grapes, watermelons and other melons, strawberries and plantains.

**Table 2.2 Italian imports of fresh fruit and leading supplying countries with their market shares, in million euro (€), shares in % of value 2005, in brackets import value from developing countries**

Product	2003	2005		Leading suppliers in 2005 (share of total product import value in %)	Share (%)
Bananas	337 (272)	370 (275)	Intra EU:	Belgium (8%), France (4.0%), United Kingdom (3.3%)	26%
			Extra EU excl DC*:		0%
			DC*	Ecuador (48%), Colombia (9%), Costa Rica (8%), Panama (4.0%), Brazil (3.7%), Dominican Rep. (1.4%)	74%
Pears and quinces	87 (50)	82 (56)	Intra EU:	Spain (22%), The Netherlands (4.5%), Belgium (2.4%)	32%
			Extra EU excl DC*:		0%
			DC*	Argentina (53%), Chile (10%), South Africa (2.9%), Uruguay (1.5%), China (0.3%), Brazil (0.1%)	68%
Pineapple	86 (31)	86 (47)	Intra EU:	Belgium (16%), The Netherlands (12%), France (7%)	46%
			Extra EU excl DC*:		0%
			DC*	Costa Rica (44%), Brazil (4.1%), Ghana (3.6%), Ecuador (1.6%), Thailand (0.3%), Dominican Rep. 0.2%)	54%
Lemons and limes	61 (34)	57 (37)	Intra EU:	Spain (24%), The Netherlands (5%), France (1.2%)	35%
			Extra EU excl DC*:		0%
			DC*	Argentina (48%), South Africa (8%), Uruguay (4.1%), Turkey (3.5%), Brazil (1.0%), Mexico (0.4%)	65%
Apples	40 (26)	34 (25)	Intra EU:	Spain (7%), The Netherlands (4.7%), France (4.1%)	24%
			Extra EU excl DC*:	New Zealand (1.5%), USA (0.9%), Switzerland (0.2%)	3%
			DC*	Chile (48%), Argentina (10%), Brazil (7%), China (5%), Uruguay (1.2%), South Africa (0.9%)	73%

Source: Eurostat 2006

\* Developing countries

### Vegetables

The major products imported by Italy are tomatoes (22% of total import value in 2005), sweet peppers (14%), mushrooms (excl. Agaricus species and truffles) (7%), and garlic (7%). The products with the largest imports from developing countries are artichokes, beans, garlic, mushrooms (excl. Agaricus species and truffles) and tomatoes (Table 2.3). Artichokes are one of the fastest-growing products. Italy is the second largest importer of artichokes in the EU after France. 64% of artichoke imports were from developing countries. Other products with growing imports from developing countries are truffles, sweet corn, courgettes, fennel, carrots and sweet pepper.

**Table 2.2 Italian imports of fresh vegetables and leading supplying countries with their import share, by value in million euro (€), shares in % value 2005, in brackets import value from developing countries**

Product	2003	2005		Leading suppliers in 2005 (share of total import value in %)	Share (%)
Artichokes	8 (2.8)	16 (10)	Intra EU:	Spain (23%), France (13%), Germany (0.3%)	36%
			Extra EU excl DC*:		0%
			DC*	Egypt (62%), Tunisia (1.8%)	64%
Beans	20 (6.8)	21 (9.4)	Intra EU:	France (42%), Spain (5%), The Netherlands (5%)	55%
			Extra EU excl DC*:		0%
			DC*	Egypt (40%), Ethiopia (2.8%), Senegal (0.5%), Morocco (0.5%), Kenya (0.3%), Bangladesh (0.2%)	45%
Garlic	34 (12)	33 (7.0)	Intra EU:	Spain (42%), France (17%), The Netherlands (14%)	79%
			Extra EU excl DC*:		0%
			DC*	China (11%), Argentina (6%), Egypt (2.3%), Turkey (1.7%)	21%
Mushrooms (excl. Agaricus spp. and truffles)	32 (4.9)	33 (6.3)	Intra EU:	Hungary (27%), Poland (7%), France (4.9%)	46%
			Extra EU excl DC*:	Bulgaria (17%), Romania (5.2%),	35%
			DC*	FJR Macedonia (15%), Turkey (1.7%), Bosnia and Herzegovina (0.8%), Serbia and Montenegro (0.3%)	19%
Tomatoes	96 (1.1)	103 (4.9)	Intra EU:	Spain (36%), The Netherlands (36%), France (12%)	95%
			Extra EU excl DC*:		0%
			DC*	Morocco (3.8%), Tunisia (0.4%), Turkey (0.4%), Egypt (0.2%)	5%

\*DC: Developing countries

Source: Eurostat 2006

### Exports

Italy is the third largest exporter of fresh fruit in the EU and the fourth of vegetables. In 2005, fruit exports were €1.8 billion and 2.6 million tonnes. Between 2001 and 2005 Italian fruit exports declined by 9% in value and 4% in volume. Germany is the main destination for the exported fruits, accounting for 36% of export value in 2005, followed by France (9%), United Kingdom (7%) and Spain (5%). The major products exported by Italy are grapes (25% of export value in 2005), apples (21%), peaches and nectarines (14%) and kiwi fruit (12%).

In 2005, fresh vegetables exports were €670 million and 614 thousand tonnes (Figure 2.2). Between 2001 and 2005, export value of vegetables decreased by 6% and volume by 27%. The leading export products are chicory (10% of total export value in 2005), carrots (7%) and lettuce (6%). Almost all exports are going to other EU countries. Germany is the main destination, accounting for 43% of total export volume. Other destinations are Austria (9%), Switzerland (9%) and France (8%).

### Opportunities and threats

Italian consumption consists for a large part of domestically produced fruit and vegetables. Due to the size of the market, imports of fresh fruit are substantial. Total imports of fruit and vegetables increased from 2001 to 2005, an increase to which developing countries contributed most. Although Italy is a major producer itself, there are imports of domestically grown such as oranges, lemons and grapes. The best opportunities for exporters from

developing countries are in the counter season. Imports of exotics are also considerable; more than half is imported directly from developing countries. Italy is not a significant re-exporter of fruit but imports mainly for domestic consumption, except for bananas. 23% of the imported bananas (€370 million in 2005) are re-exported, especially to Greece, France and Germany.

### Useful sources

- EU Expanding Exports Helpdesk - <http://export-help.cec.eu.int/>
- Eurostat – official statistical office of the EU - <http://epp.eurostat.cec.eu.int>

## 3. Trade structure

### Trade channels

The Italian trade structure is similar to the structure of other European countries, but it is more small scale. Family-owned businesses are dominant. Specialist importers import exotic and off-season products. Public markets still hold the largest share of retail sales.

### Retail trade

Italian food retail is more fragmented than in other large EU countries such as France or Germany. Small and local food retailers account for a larger part of retail sales. As many as 70 thousand small, traditional shops account for 12% of total food sales (Food International 2005). Large supermarkets and hypermarkets are more common in the north of Italy where they have a higher market share. Multiple retail chains have not yet made the same advances in sales of fresh fruit and vegetables as in northern Europe. The supermarket sales of fresh fruit and vegetables are growing at a slower rate than other food products. But the trends of convenience, one-stop-shopping and price consciousness are also present in Italy. The market shares of supermarkets, hypermarkets and discount stores are therefore rising. Figure 3.1 shows the market share of the different retail outlets in Italy in 2002.

**Figure 3.1 Market share of retail outlets in sales of fresh fruit and vegetables in Italy, 2002, % of total volume sales**



Source: CSO Centro Servizi Ortofrutticoli 2005

The large supermarkets in Italy have central purchasing and import facilities. The smaller supermarkets and independent food retail stores buy from wholesalers and specialized importers. The largest trade companies for food products to supermarkets in Italy are:

- Intermedia S.R.L.
- MECADES
- Coop Italia, <http://www.coop.it>
- ESD Italia
- Carrefour Italia, <http://www.carrefour.it>

For more information on trade structure, see the CBI market survey 'The fresh fruit and vegetables market in the EU', which can be downloaded from <http://www.cbi.nl/marketinfo>.

#### 4. Prices

From 2001 to 2005, the average import price of fruit decreased by 3.5%, to €0.75 per kg. The average price of imports from developing countries decreased by 6%, to €0.67.

The average price of bananas imported from developing countries was €0.61 per kg in 2005, less than the EU average of €0.65. From 2003 to 2005, the average import price of bananas increased by 12%. Minor products such as watermelons and figs showed the largest increase in average prices of imports from developing countries. The average import prices from developing countries decreased for: pears and quince -4% to €0.65; apples -9% to €0.72 and pineapples -22% to €0.78.

From 2001 to 2005, the average import price of vegetables increased by 4% to €0.99 per kg. Over the same period, the average price of vegetables from developing countries increased by 23% to €1.11. The average price of peas imported from developing countries showed the largest increase of 52% to €0.91. The average price of imports from developing countries also increased of: artichokes +16% to €1.20 and tomatoes +8% to €0.78. Products that decreased in price were: beans -4%, €1.10, mushrooms -6%, €5.66; and garlic +14%, €0.82.

Importers and agents can give up-to-date information on the price levels of individual products.

#### Useful sources

- For prices of fruit and vegetables, please visit the ISMEA <http://www.ismea.it>.

#### 5. Market access requirements

As a manufacturer in a developing country preparing to access Italy, you should be aware of the market access requirements of your trading partners and the Italian government. Requirements are defined through legislation and through labels, codes and management systems. These requirements are based on environmental, consumer health and safety and social concerns.

#### Legislative requirements

National legislation in EU countries is compulsory for all products traded within the country concerned. Therefore, as an exporter in a developing country you have to comply with the legislative requirements that are applicable to your products. For information on legislation for fresh fruit and vegetables go to the CBI website at <http://www.cbi.nl/marketinfo>, select your market sector and the EU country of your interest in the category search, click on the search button and click on legislative requirements for an overview of all documents on legislation in your country of interest.

#### Non-legislative requirements

Social, environmental and quality related market requirements are of growing importance in international trade and are often defined by European buyers through labels, codes of conduct and management systems. For information on non-legislative requirements applicable to fresh fruit and vegetables, go to the CBI website at <http://www.cbi.nl/marketinfo>, select your market sector and the EU country of your interest in the category search, click on the search button and click on your subject of interest under non-legislative requirements for an overview of all documents on the subject concerned in your country of interest.

### **Packaging, marking and labelling**

Requirements for packaging and labelling are subject to the EU marketing standards of fresh fruit and vegetables. You can download information on these requirements for the CBI website. Go to <http://www.cbi.nl/marketinfo>.

### **Tariffs and quota**

Access for fruit and vegetables to the European market is regulated through EU Regulation EC 2200/96, on the common organization of the market in fruit and vegetables. This regulation states, among other things, the arrangements regarding trade with third countries. For many fresh fruits and vegetables, an import duty has to be paid. For some product, also an entry price or tariff quota may be applied. Countries that are part of the Generalised System of Preferences (GSP) of the EU can make use of the preferential duty rates which are substantially lower than the normal rates. More information on the GSP system can be found at the EU Export Helpdesk for Developing Countries, <http://export-help.cec.eu.int>.

For fresh fruit and vegetables, the reduced VAT rate of 4% is applicable.

## **6. Business practices**

### **Selecting a suitable trading partner**

When doing business with Italian trading partners, knowledge of the Italian language is rather important since few Italians speak English well. Many of the private companies in Italy are medium to small. Many are family businesses run by the head ('padrone') of the family. The business environment is formal, but business talks can be indirect with the exchange of many courteous words. Italians are not as direct and to the point as northern Europeans are. Italy is not a country where business is done quickly. It will take some time to gain the confidence of the business partner and to come to an agreement. Business should be done with respect of the hierarchical structure; most often business is done with the head of the company.

For information on selection of suitable trading partners, please consult CBI's market survey covering the EU market for fresh fruit and vegetables market. Or refer to CBI's 'Export Planner' for general information on exporting, both available at <http://www.cbi.nl/marketinfo>.

### **Coming to terms with your trade partner**

The terms of the contract should be discussed with the person that is entitled to decide on these matters, which is most often the head of the company. Agreeing on the terms can take time since Italians do not rush in business.

For information regarding different payment methods and delivery terms, please refer to CBI's Export Planner, and the CBI market survey covering the EU market for fresh fruit and vegetables 2006. Both documents can be downloaded from the CBI website at <http://www.cbi.nl/marketinfo>.

### **Sales promotion**

Visiting or participating in a trade fair in Italy is an important tool for approaching potential trading partners. The major Italian trade fair for producers and exporters of fresh fruit and vegetables is:

- So Fresh, Bologna. <http://www.sofresh.bolognafiore.it>.

For more information on sales promotion, go to CBI's publication 'Export Planner' and 'Your Image Builder' available at <http://www.cbi.nl/marketinfo>.

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