



Camera di Commercio
Udine

Centro Studi – Ufficio Statistica e Prezzi

**FOOD & BEVERAGE INDUSTRY
IN THE ECONOMY OF
FRIULI VENEZIA GIULIA**
with focus on Wine sector

April 2017

The Food & Beverage Industry in Italy

61 thousand and 800 companies (12.5% of the manufacturing industry)

435 thousand workers (11.5% of total manufacturing industry)

25,299* billion euros *the value added* (10.9% of total manufacturing industry)

Food exports in 2016: **23,758 MEUR**

Food import in 2016: **25.607 MEUR**

Export Beverages in 2016: **7,589 MEUR**

Import Beverave in 2016: **1.495 MEUR**

(*) tobacco included

Source: InfoCamere, Istat

Friuli Venezia Giulia: which type of F&B companies (December 31, 2016)

Food and beverage industries (809 companies):

- Processing, preserving of meat, meat products
- Processing and preserving of fish, crustaceans and molluscs
- Processing and preservation of fruits and vegetables
- Production of vegetable and animal oils and fats
- Dairy industry
- Processing of granaries, production of starches and starch products
- Production of bakery products and flour products
- Production of other food products (sugar, cocoa, chocolate, candy and confectionery, tea and coffee processing, seasoning and spices production)
- Production of products for the feeding of animals
- Beverage industry

Source: InfoCamere data processing

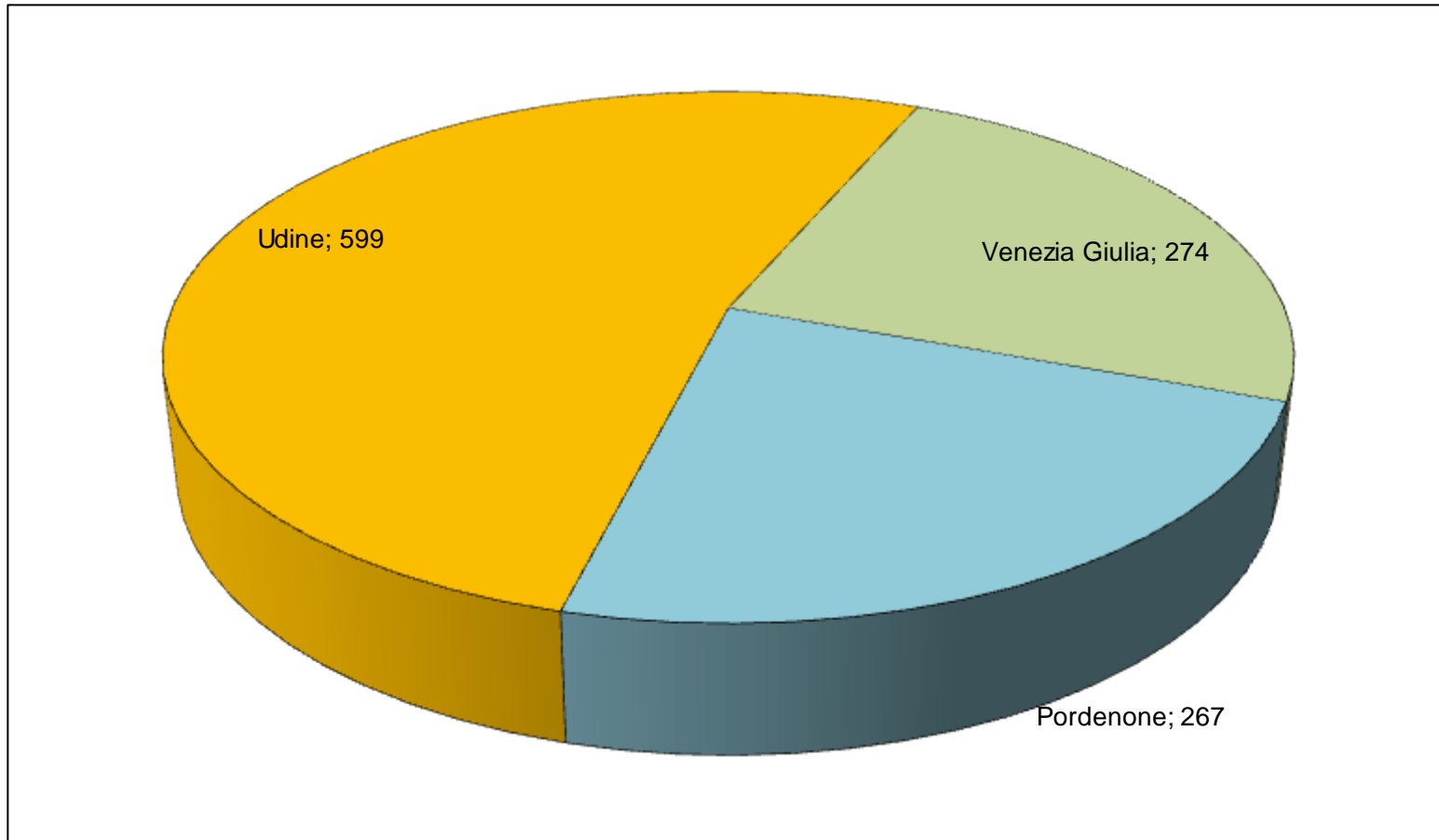
Economic weight on Friuli Venezia Giulia

	F&B Industry	Manufacturing Industry (total)	%
Localizzazioni attive (31 dicembre 2016)	1.140	12.239	9,4%
Workers	8thousands	110thousands	7,1%
Export 2016 (in MEUR)	718,17	13.240,00 Total on the economy	5,4%
Import 2016 (in MEUR)	309,31	6.789,14 Total on the economy	4,6%
Added value (*) at basic prices (in MEUR)	468,20	6.308,43	7,4%

(*) F&B and tobacco industries

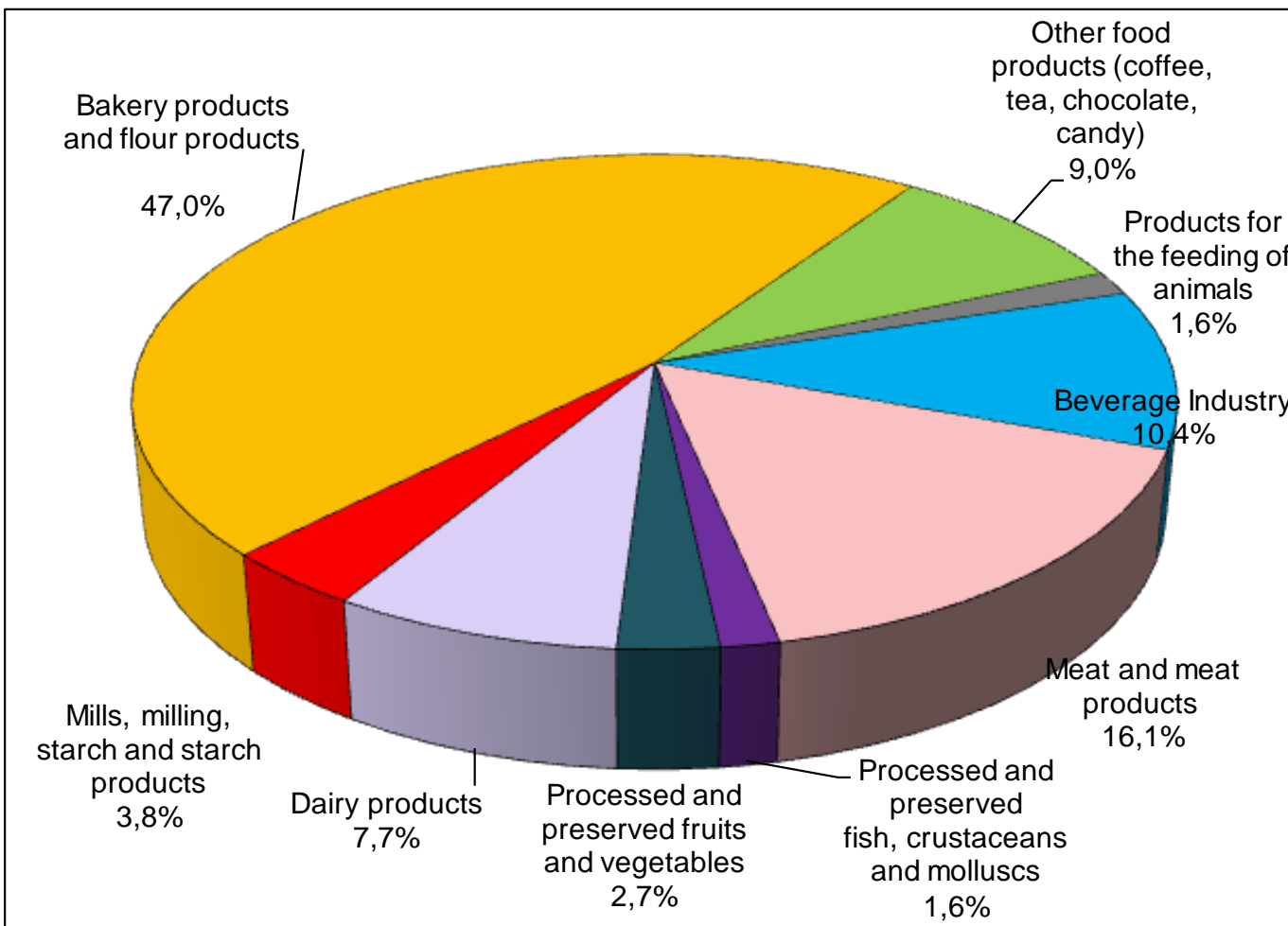
Source: InfoCamere data processing

Distribution by Province of the Region (December 31, 2016)



Source: InfoCamere data processing

Distribution by Type of Activity (December 31, 2016)

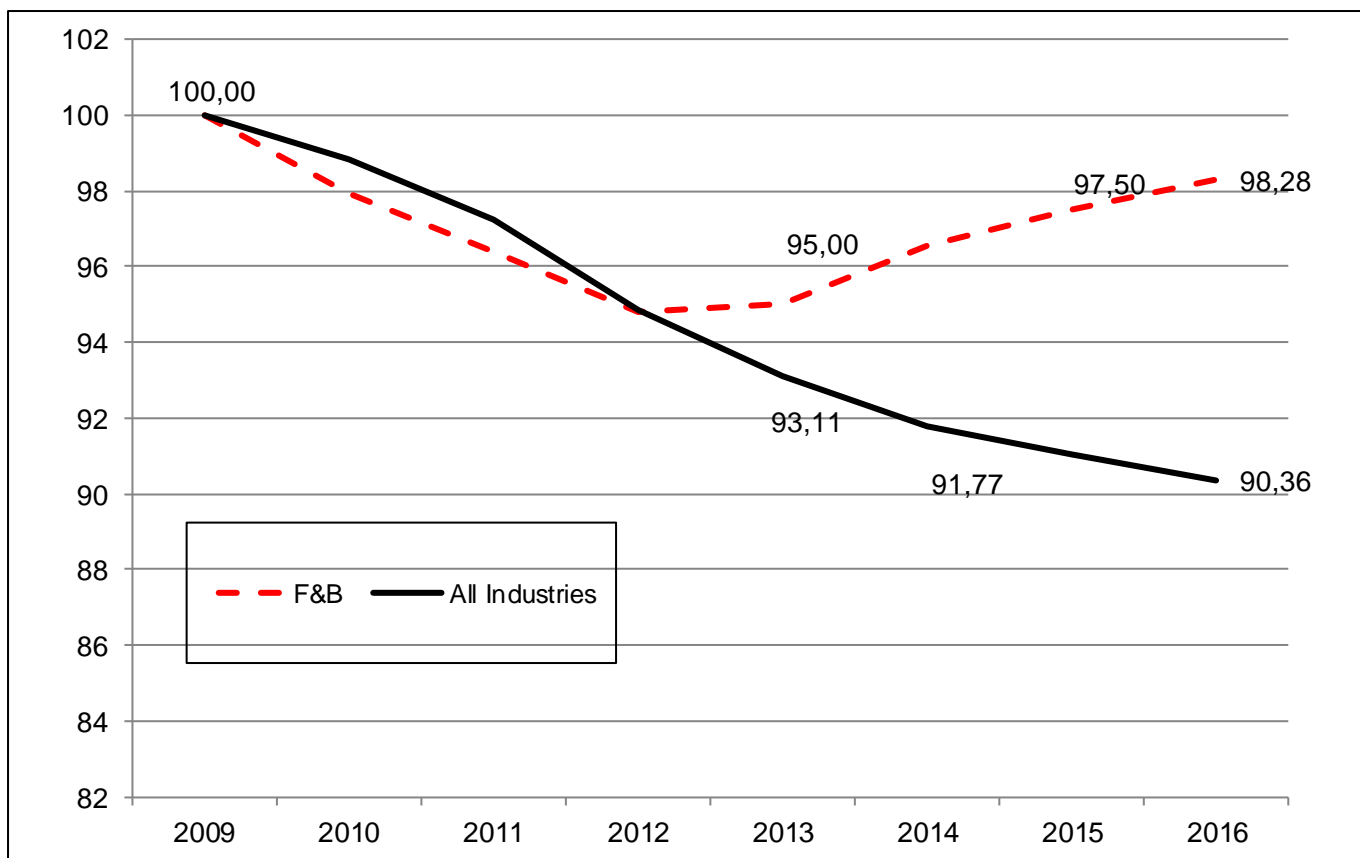


Source: InfoCamere data processing

Food & Beverage Industry

Trend of the companies in Friuli Venezia Giulia

Fixed base index numbers: 2009 = 100



Source: InfoCamere data processing

Municipalities with a greater presence of companies in the Food & Beverage Industry (December 31, 2016)

	Municipality	Companies	% of the city industry
1	Trieste	128	12,5%
2	San Daniele del Friuli	60	40,3%
3	Udine	53	7,8%
4	Gorizia	36	16,0%
5	Pordenone	23	5,1%
6	Spilimbergo	22	16,4%
7	Gemona del Friuli	17	18,1%
8	Monfalcone	16	3,8%
9	San Vito al Tagliamento	16	8,1%
10	Codroipo	15	10,8%

Source: InfoCamere data processing

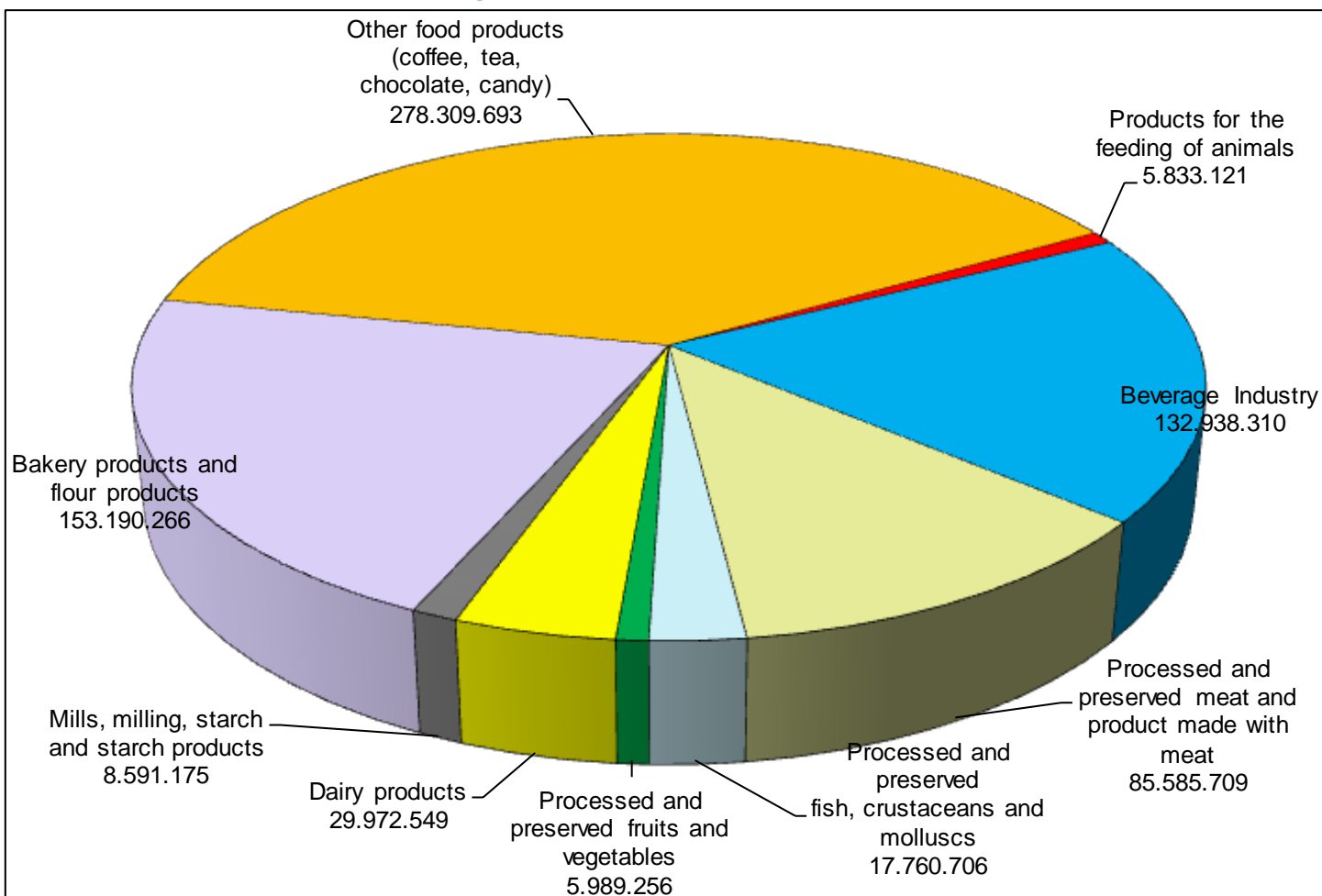
Food & Beverage Industry | **Export (in euros)** Friuli Venezia Giulia (2006-2016)

Year	Food & Beverage products		Focus Wine	
	v.a.	Var. %	v.a.	Var. %
2006	466.567.770	+10,74%	91.819.739	+6,50%
2007	503.202.828	+7,85%	95.419.538	+3,92%
2008	446.220.889	-11,32%	98.473.624	+3,20%
2009	416.970.644	-6,56%	87.637.550	-11,00%
2010	472.065.104	+13,20%	93.606.742	+6,79%
2011	534.015.497	+13,12%	100.990.741	+7,89%
2012	579.720.654	+8,56%	104.620.830	+3,59%
2013	570.617.210	-1,57%	92.081.758	-11,99%
2014	628.200.793	+10,09%	109.241.400	+18,64%
2015	703.177.793	+11,94%	121.028.270	+10,79%
2016	718.170.785	+2,13%	132.938.310	+9,84%

Source: Istat data processing

Friuli Venezia Giulia Food & Beverage Industry | **Export, 2016**

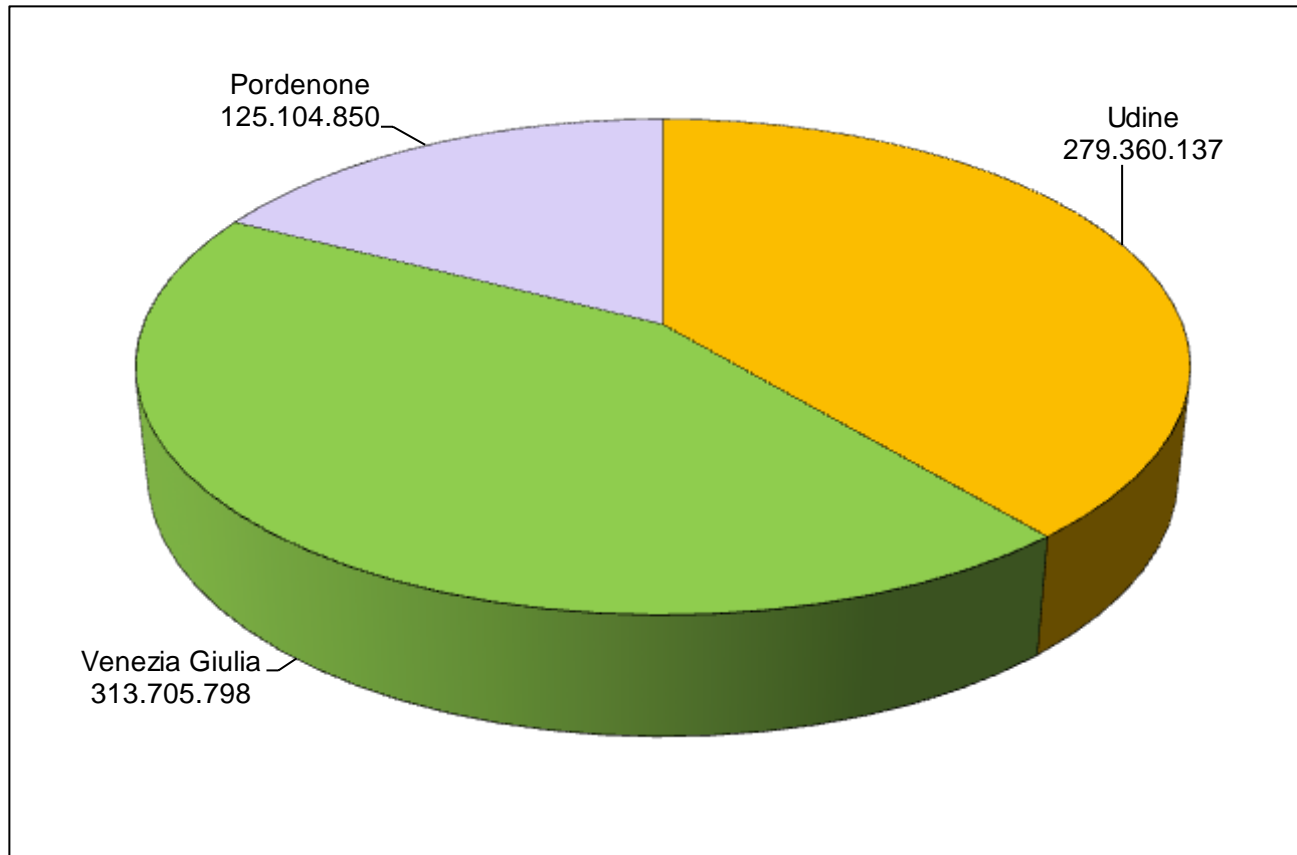
Type of product



Source: InfoCamere data processing

Food & Beverage Industry | Export for Provinces

(2016, value in euros)



Source: InfoCamere data processing

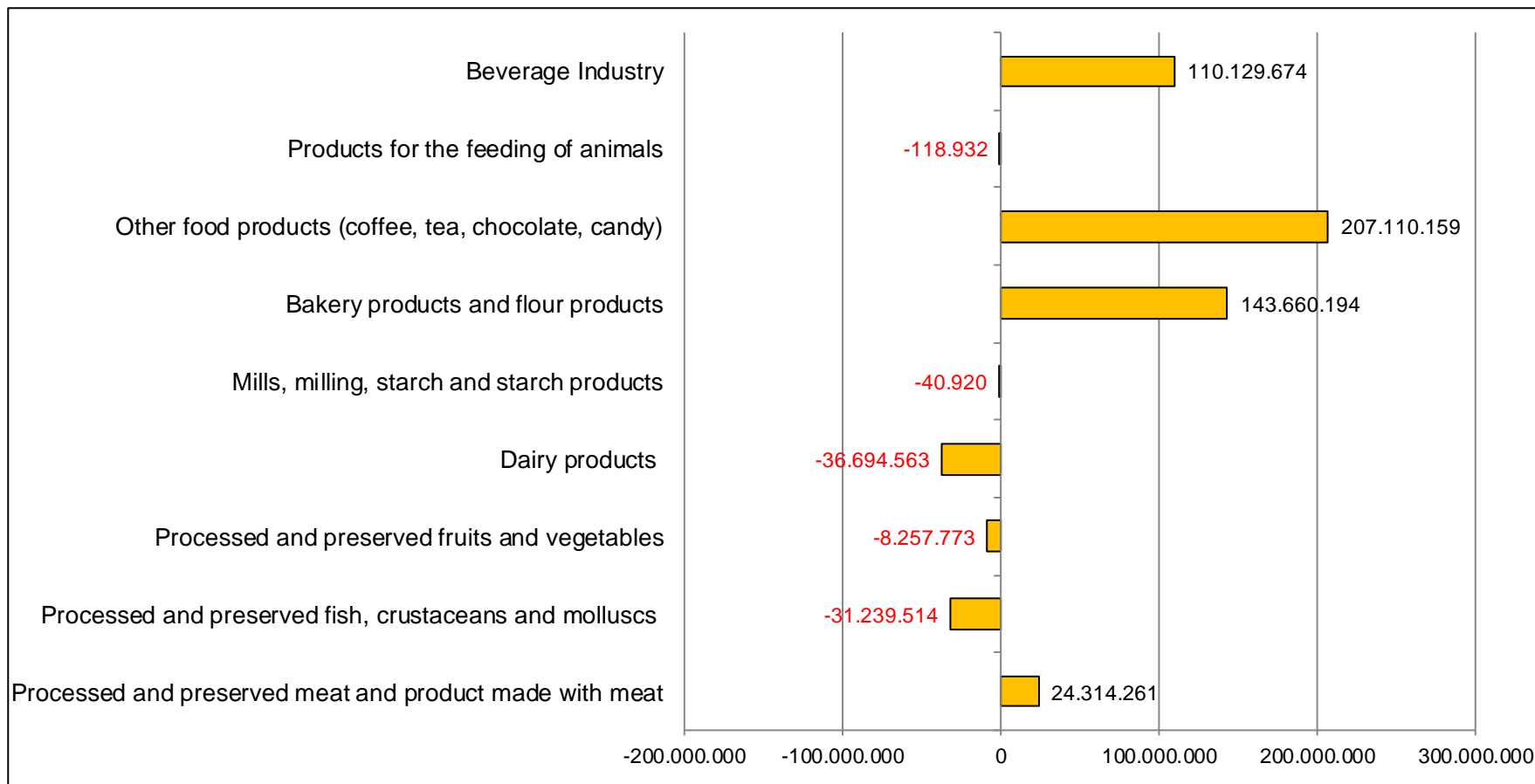
Food & Beverage Industry | Import (in euros)

Friuli Venezia Giulia (2006-2016)

Year	Food & Beverage products		Focus: Food	
	v.a.	Var.%	v.a.	Var.%
2006	255.700.535	-1,64%	234.340.574	-1,93%
2007	264.005.735	+3,25%	242.973.269	+3,68%
2008	254.932.986	-3,3%	236.731.561	-2,57%
2009	215.691.541	-15,39%	196.564.807	-16,97%
2010	237.569.543	+10,14%	218.796.098	+11,31%
2011	266.758.150	+12,29%	244.462.183	+11,73%
2012	282.313.665	+5,83%	254.544.169	4,12%
2013	312.045.790	+10,53%	285.022.708	+11,97%
2014	326.727.289	+4,70%	305.718.576	+7,26%
2015	293.073.477	-10,30%	270.087.835	-11,65%
2016	309.308.199	+5,54%	286.499.563	+6,08%

Source: Istat data processing

Food & Beverage Industry Trade Balance in Friuli Venezia Giulia (2016, value in euros)



Source: Istat data processing

Main Friuli Venezia Giulia Food Exports Countries. Export 2016: 585,232,475 euros in 125 countries.

Countries	in euros	% on the total food exported
Germany	120,875,845	20,65%
United States	54,213,095	9,26%
France	49,375,267	8,44%
United Kingdom	42,108,548	7,20%
Austria	37,375,045	6,39%
Slovenia	34,300,702	5,86%
Greece	29,689,393	5,07%
Croatia	20,213,561	3,45%
Spain	15,503,469	2,65%
Danmark	14,913,002	2,55%

Source: Istat data processing

Main Friuli Venezia Giulia Food Imports Countries. Friuli Venezia Giulia. Import 2016: 285.499.563 euros

Countries	in euros	% on the total food imported
Germany	54,062,419	18,87%
Indonesia	23,909,571	8,35%
Slovenia	22,190,433	7,75%
Netherlands	21,443,852	7,48%
Polond	19,251,894	6,72%
Spain	17,302,129	6,04%
France	16,528,114	5,77%
Austria	16,438,668	5,74%
United Kingdom	11,449,678	4,00%
Switzerland	10,089,917	3,52%

Source: Istat data processing

Main Friuli Venezia Giulia Beverages Exports Countries. Export 2016: 133 MEUR in 115 Countries

Countries	in euros	% on the total beverages exported
United States	33,352,981	25,09%
Germany	23,146,106	17,41%
United Kingdom	18,039,847	13,57%
Canada	6,662,317	5,01%
Austria	6,522,007	4,91%
Australia	5,551,162	4,18%
China	4,874,420	3,67%
Switzerland	4,604,045	3,46%
Japan	3,366,835	2,53%

Source: Istat data processing

Italian Protected Designation of Origin (PDO), Protected Geographical Indication (PGI)

Area/Region	PDO	PGI
North West	39	23
North East (with evidence)	51	47
<i>Trentino Alto Adige</i>	9	5
<i>Veneto</i>	18	18
<i>Friuli Venezia Giulia</i>	5	1
<i>Emilia Romagna</i>	19	23
Centre	39	37
South	76	41

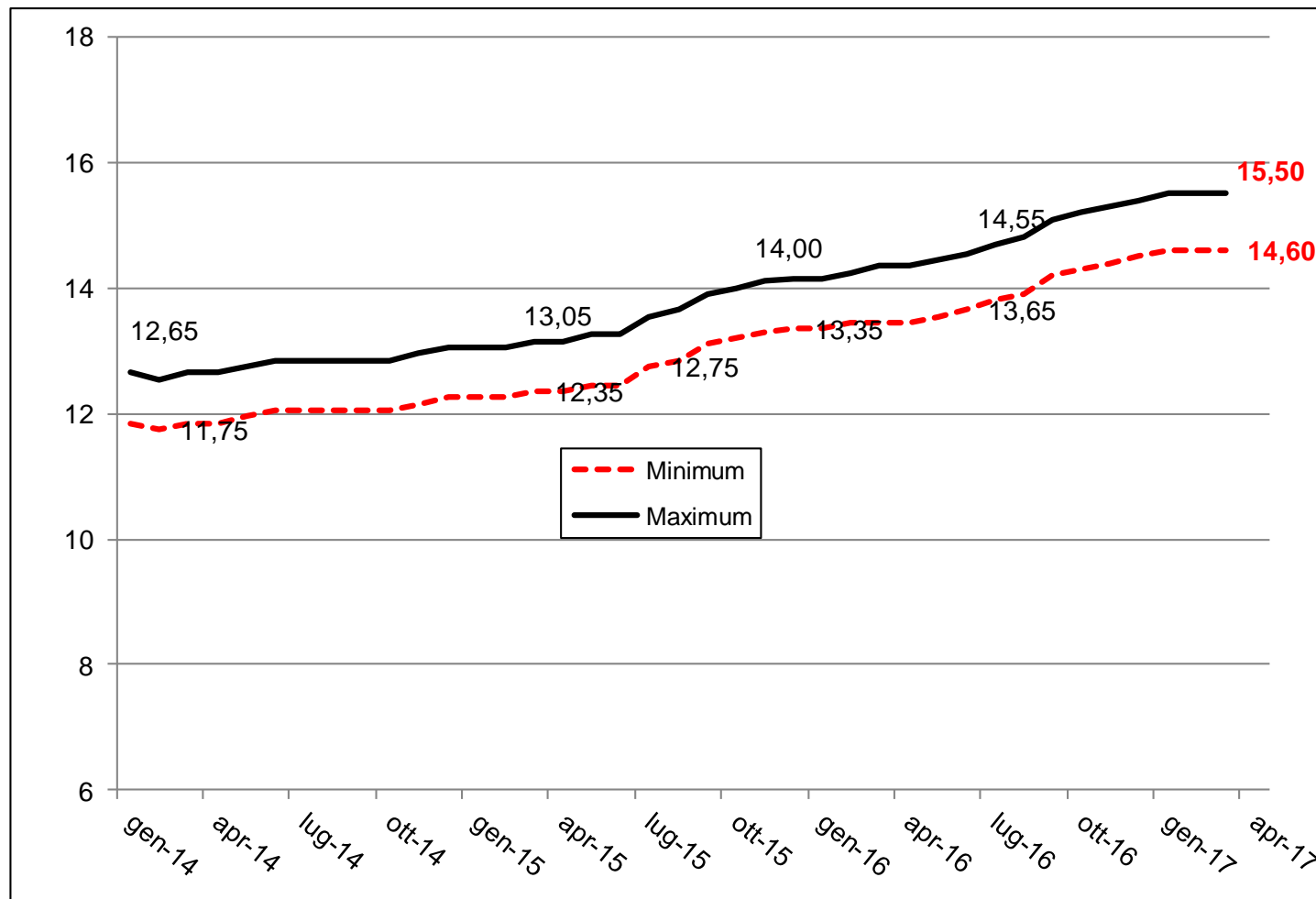
The territory of each PDO and PGI product is precisely defined by EU and Italian legislation, which delimits the area within each specialty can be produced and /or transformed.

For each agro-food specialities (excluding the wine sector), the territory concerned may comprise from one municipality to several regions.

Source: Istat data processing (December 16, 2016)

Prices of POD products: **San Daniele ham (*)**

Historical series January 2014 - March 2017 (euro / Kg)



(*) Bone weight 7.5 kg. and more, from manufacturer to retailer

Source: Istat data processing

The Excellences

- **Prosciutto di San Daniele POD**
<http://www.parcoalimentare.it>
<http://www.prosciuttosandaniele.it>
- **Wines DOC, DOCG, IGP**
<http://www.mtvfriulivg.it>
<http://www.federdocfvg.it>
- **Montasio**
<http://www.formaggiomontasio.net>
- **Olio extravergine di Oliva Tergeste**
<http://www.tergestedop.it>
- **Apple from Friuli Venezia Giulia**
- **Brovada POD**

Advanced Services, Promotion and Training

Area Science Park di Trieste

<http://www.area.trieste.it>

Le università

<http://www.univ.trieste.it> (Trieste)

www.uniud.it (Udine)

CATAS s.p.a.

(also with functions of Chemical Laboratory for raw materials)

<http://www.catas.it>

Istituto Nord Est Qualità (San Daniele del Friuli)

<http://www.ineq.it>

Parco Scientifico e Tecnologico “Luigi Danieli” di Udine

<http://www.ilparcodiudine.com>

Parco Agro-Alimentare di San Daniele Soc. consortile a r.l.

<http://www.parcoagroalimentare.it>

Consorzio del Prosciutto di San Daniele

<http://www.prosciuttosandaniele.it/>

Polo Formativo Agroalimentare del Friuli Venezia Giulia

<http://www.agroalimentare.fvg.it/>

The most important **food** businesses for turnover (2015)

Illycaffè Spa (Trieste), Principe di San Daniele Spa (San Dorligo della Valle), Roncadin Spa (Meduno), Quality Food Group Spa (Martignacco), Oleificio San Giorgio Spa (San Giorgio di Nogaro), Venchiaredo Spa (Sesto al Reghena), La Giulia Spa (Gorizia), Testa & Molinaro Spa (San Daniele del Friuli), Morgante Spa (San Daniele del Friuli), Società di Macinazione Spa (Pordenone), Natural Food Srl (Coseano), Compagnia delle Carni Srl (Gorizia), Leoncini Prosciutti Spa (San Daniele del Friuli), Framon Spa (San Daniele del Friuli), Jolanda De Colò Spa (Pamanova), Gruppo Carni Friulana Srl (Aviano), Fornerie Gusparo Srl (Coseano), Pezzetta Srl (Fagagna).

Fonte: Top 500, NordEst Economia, Messaggero Veneto newspaper, January 2015

The most important **beverage** businesses for turnover (2015)

Birra Castello Spa (San Giorgio di Nogaro), Gruppo Vitivinicolo Fantinel Spa (Spilimbergo), Goccia di Carnia Srl (Forni Avoltri), Nonino distillatori Spa (Pavia di Udine), CIEMME Liquori Spa (Gorizia), Distillerie Camel Spa (Povoletto), Sorgenti Valcimoliana Srl (Cimolais), Parovel Group Srl (Trieste), Martellozzo Piera Spa (San Quirino), Paladin Spa (Pravisdomini), Cantina di Bertolo Spa (Bertiolo).

Fonte: Top 500, NordEst Economia, Messaggero Veneto newspaper, December 3, 2015



Focus

The wine sector

World Wine Consumption (Top 10 Countries): 2014

Country	(in millions of HI)	Per capita consumption (liters)
1 United States	30,7	10,1
2 France	27,9	44,4
3 Italy	20,4	34,0
4 Germany	20,2	24,2
5 China	15,8	1,2
6 United Kingdom	12,6	20,3
7 Spain	10,0	21,7
8 Argentina	9,9	24,5
9 Russia	9,6	6,6
10 Australia	5,4	24,3

The trend of wine consumption is decreasing: it has been swirling for several years between 240 and 245 million hectoliters.

The US market confirms to be the most important in the world and the only one with interesting growth.

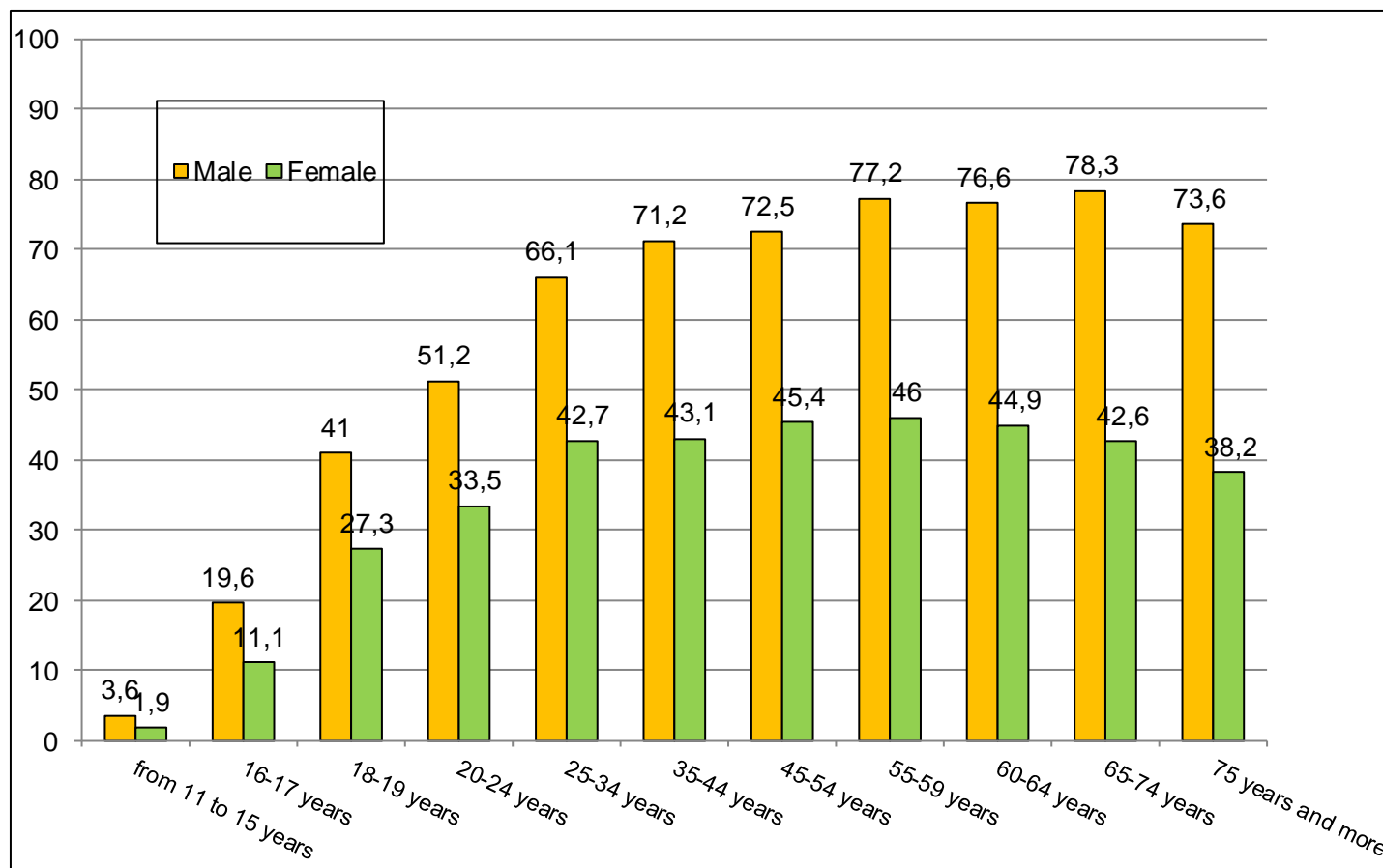
The second market is France, which seems to have taken the downside, some years after Italy.

China also seems to have suffered a drop in wine consumption.

In Italy, wine consumption is around 20.4 million hectoliters, the lowest in the past seven years.

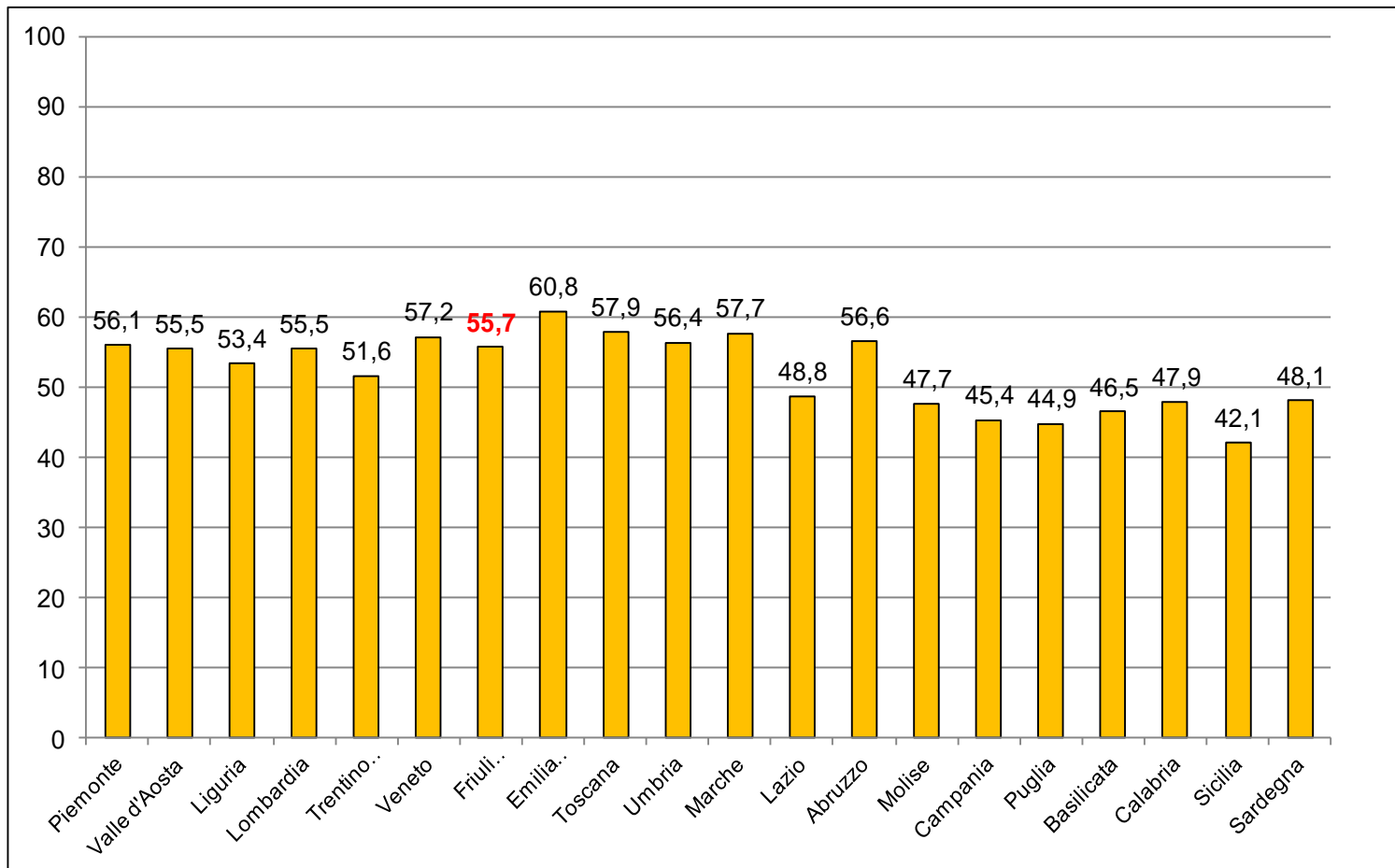
*Source: elaborations on OIV data
(International Organization of Vine
and Wine)*

People who drink wine in Italy by gender and age class Year 2015 (For 100 of the same kind and same age class)



Source: Istat data processing

People in Italy consuming wine by region: Year 2015 (for 100 people in the same region)



Source: Istat data processing

World Wine Production (Top 10 Countries): Estimates 2015

Country	(in millions of HI)	% on total world
1 Italy	49,5	18,0
2 France	47,5	17,3
3 Spain	37,2	13,6
4 United States	22,1	8,1
5 Argentina	13,4	4,9
6 Chile	12,9	4,7
7 Australia	11,9	4,3
8 South Africa	11,2	4,1
9 China	11,0	4,0
10 Germany	8,9	3,2

Wine production in 2015 is estimated at 274.4 million hectoliters.

Italy is given as the largest producer with 49.5 million hectoliters; The second largest producer in the world is France with 47.5 million hectoliters, and Spain is third with a production of 37.2 million hectoliters.

There are three American countries: the United States with an estimated production of 22 million hectoliters, Chile with almost 13 million hectoliters and Argentina with 13 million hectoliters.

*Source: elaborations on OIV data
(International Organization of Vine
and Wine)*

Main Countries of Exports of **Grape Wines**: ITALY Export 2015: 5,390,372,510 euros

Destination Country	in euros	% on total export
United States	1,280,337,493	23,75%
Germany	961,686,582	17,84%
United Kingdom	746,203,478	13,84%
Swiss	323,820,797	6,01%
Canada	299,203,845	5,55%
Japan	158,226,024	2,94%
Sweden	149,358,110	2,77%
Danmark	144,955,565	2,69%
France	142,987,143	2,65%

Source: Istat data processing

Exports of Grape Wines by Region

Export 2015: 5,390,372,510 euros

Region	in thousands of Euros	% on total export	Var. % on 2014
1 Veneto	1.834.474	34,03%	+9,82%
2 Piemonte	964.794	17,90%	-2,03%
3 Toscana	902.419	16,74%	+18,50%
4 Trentino-Alto Adige	500.355	9,28%	+1,77%
5 Emilia Romagna	275.018	5,10%	-11,22%
6 Lombardia	255.290	4,74%	-4,70%
7 Abruzzo	140.295	2,60%	+7,19%
8 Puglia	101.508	1,88%	+6,44%
9 Sicilia	101.331	1,88%	+3,15%
10 Friuli-Venezia Giulia	100.729	1,87%	+10,06%

In 2015, the value of exports of "Grape Wines" in Italy was 5.4 billion euros.

Veneto, Piedmont and Tuscany are the regions that account for nearly 70% of national exports.

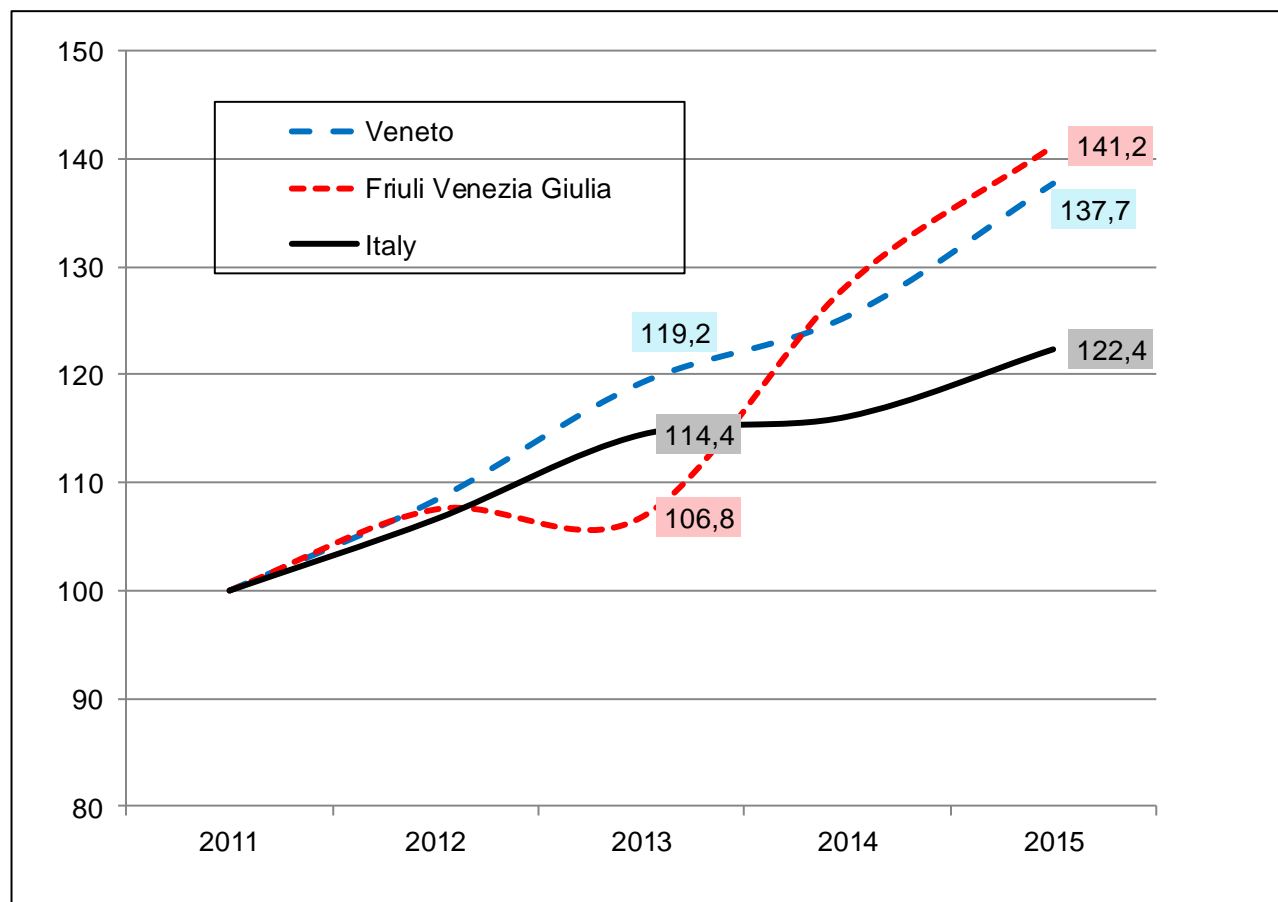
Friuli Venezia Giulia occupies the 10th position of the regional ranking (1.9% of Italian exports).

Source: Istat data processing

Export trends of **Grape Wines**

Comparison: Friuli Venezia Giulia, Veneto and Italy

Fixed base index numbers: 2011 = 100



Source: Istat data processing

The value of Friuli Venezia Giulia's "Grape wines" exports (at current prices) has increased from 71 million euros in 2011 to 101 million euros in 2015.

This increase is mainly due in the two-year period 2014-2015.

Italy as a whole recorded a strong increase in exports, driven by the Regions: Veneto, Tuscany, Friuli Venezia Giulia and Abruzzo.

The wineries in Friuli Venezia Giulia: the numbers (December 31, 2016)

	Grape growing	Production of wines from grapes
Friuli Venezia Giulia	2.146	58
Gorizia	543	7
Pordenone	759	26
Trieste	171	5
Udine	673	20

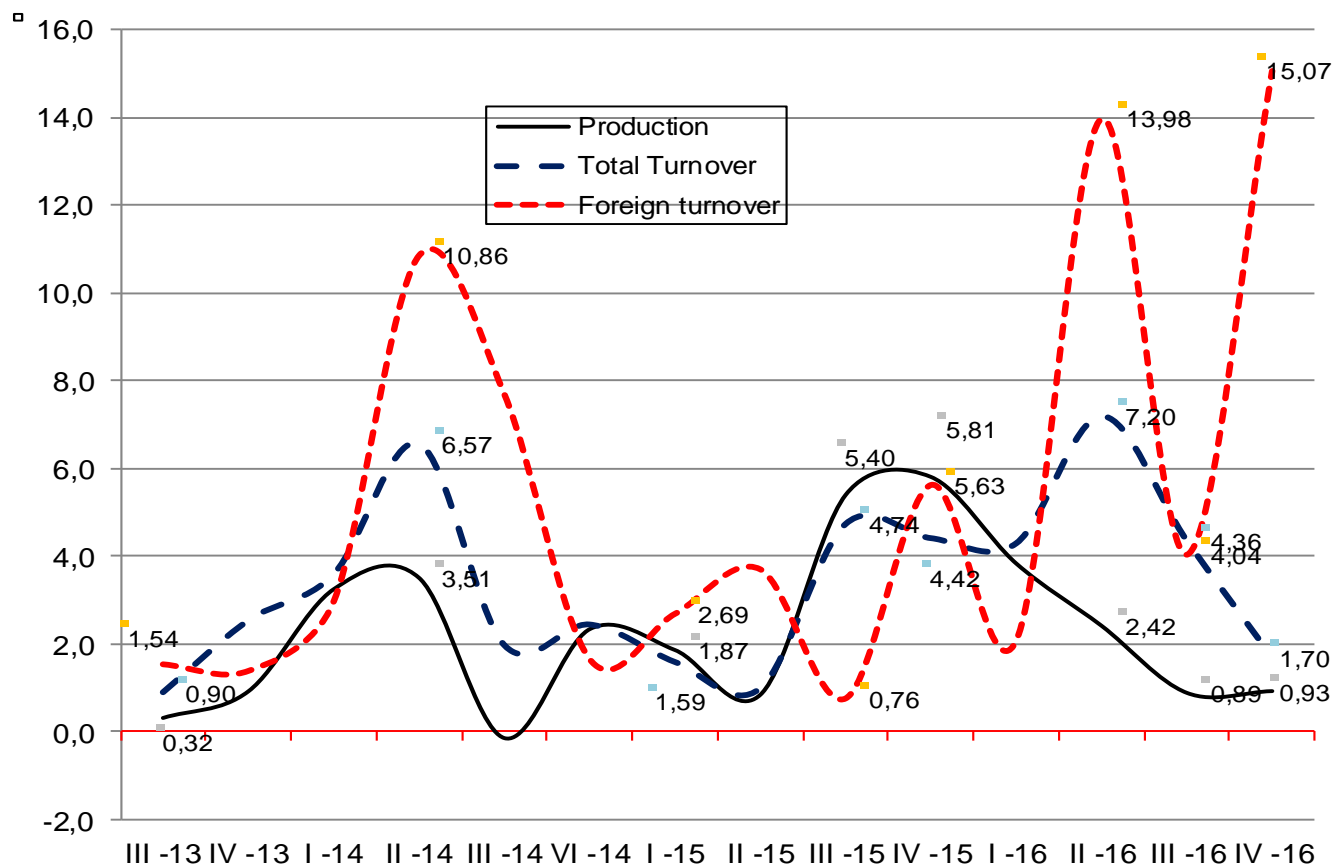
Source: Infocamere data processing

Viticulture: in 2016 all the economic indicators (var% tendential)

Production increased (+ 3.8% in the first quarter, + 2.4% in the 2nd, + 0.9% in the 3rd and + 0.9% in the fourth quarter)

Turnover (+ 4.3% in the first quarter, + 7.2% in the 2nd, + 4.3% in the 3rd - + 1.7% in the fourth quarter)

Foreign turnover is growing.

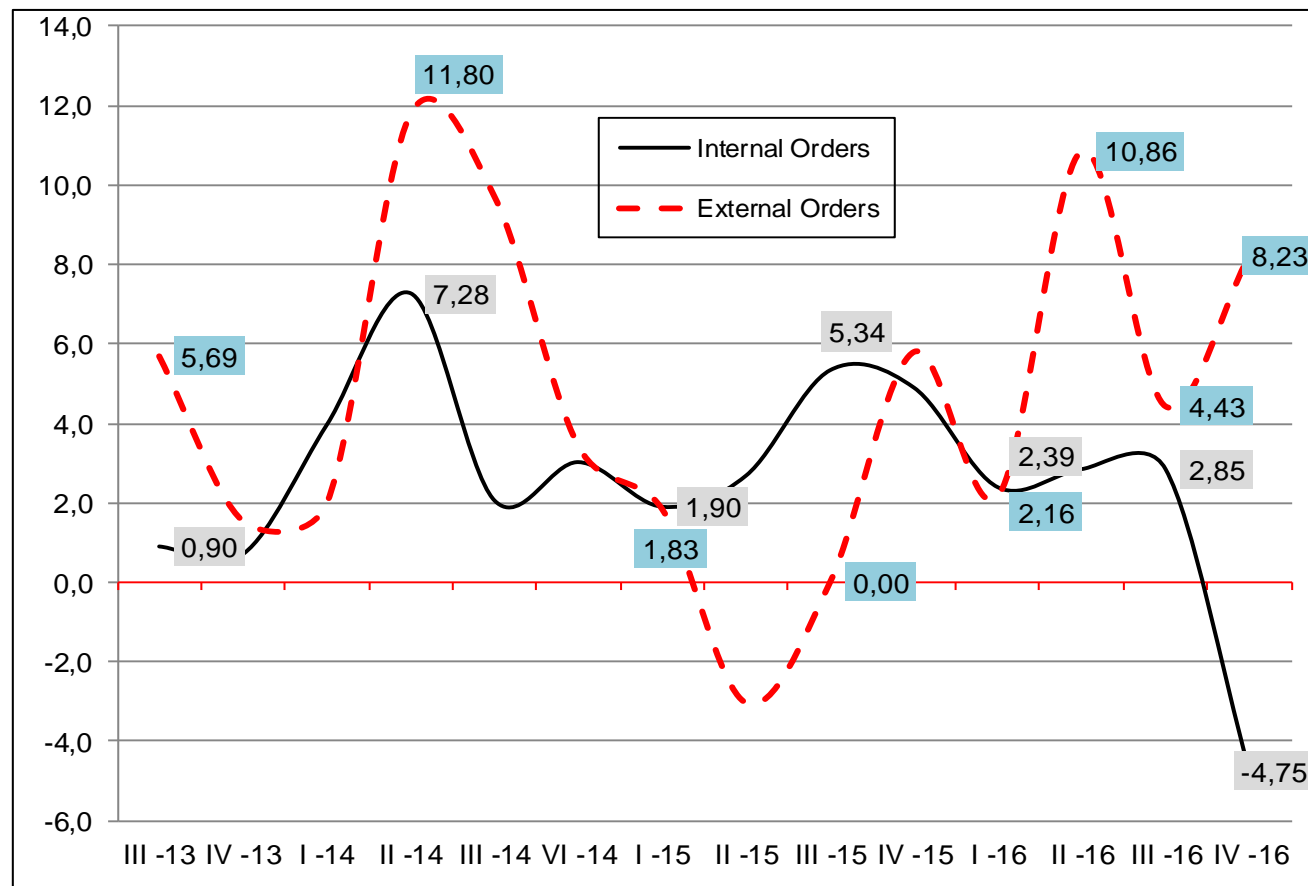


Source: Unioncamere FVG Economic Survey

Viticulture: in 2016, both internal and external orders grow (var% tendential)

Foreign orders were positive (+ 2.1% in the first quarter, + 11% in the 2nd, + 4.4% in the 3rd and + 8.2% in the fourth quarter)

Internal orders were confirmed (+ 2.3% in the first quarter, + 2.8% in the 2nd and 3rd quarter).



Source: Unioncamere FVG Economic Survey

Trend of wholesale prices of main wines of Friuli Venezia Giulia

	<i>May 2014</i>	<i>May 2016</i>	<i>March 2017</i>
Cabernet franc (Friuli Colli Orientali)	95 euro/hl	95 euro/hl	95 euro/hl
Sauvignon (Friuli Colli Orientali)	155 euro/hl	155 euro/hl	155 euro/hl
Friulano (Friuli Colli Orientali)	135 euro/hl	135 euro/hl	135 euro/hl
Merlot (Friuli Colli Orientali)	85 euro/hl	85 euro/hl	85 euro/hl
Pinot grigio IGT delle Venezie	120 euro/hl	100 euro/hl	100 euro /hl
Glera IGT delle Venezie	68 euro/hl	73 euro/hl	n.q.
Prosecco DOC interregionale	108 euro/hl	225 euro/hl	190 euro/hl

Source: Camera di Commercio di Udine

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Sitography

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Rapporto redatto dal Centro Studi

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