REGIONE DEL VENETO

YEAR 13 - SEPTEMBER 2013

STATISTICHE Flash

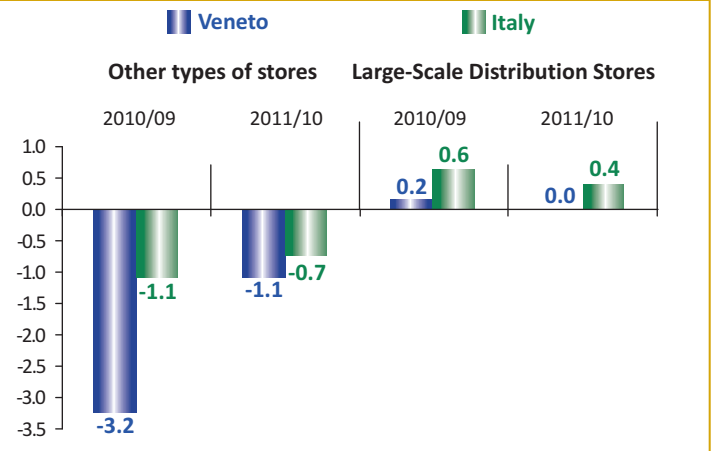
Figures and graphs to understand Veneto

THE DISTRIBUTION OF AGRIFOODS IN VENETO

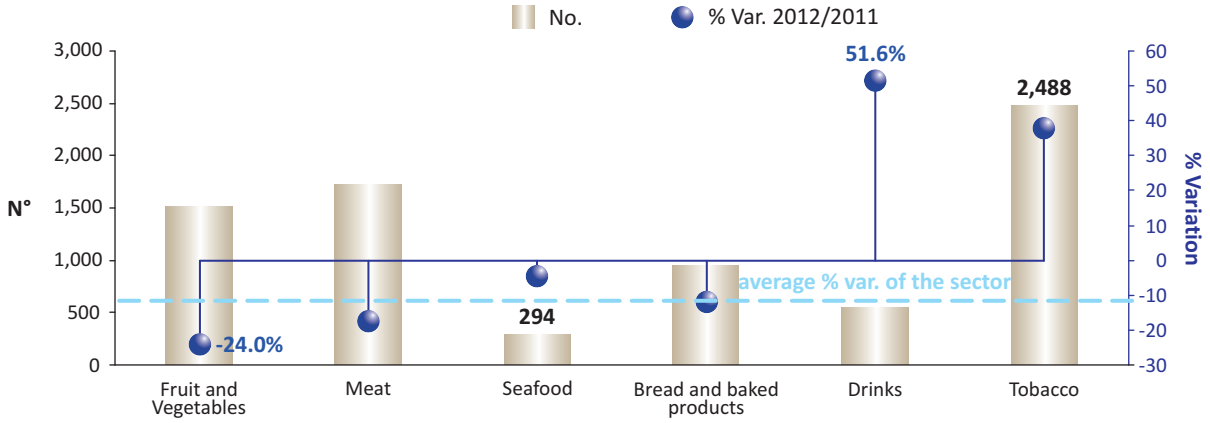
Food arrives on our tables via a complex chain that involves numerous participants as well as close relationships of exchange; some of these will be analysed in this issue.
The majority of agrifood products are purchased through the commercial channels of specialised stores (butchers, grocers, bakeries, fishmongers, etc.) and non-specialised stores (supermarkets, hypermarkets, discount stores, etc.). In recent years, the type and number of these stores, as well as the number of sales made through these distribution channels, have changed.
In Veneto, over the last 10 years, the number of non-specialised stores has increased almost by a fifth (+19%); however, specialised stores have suffered a decrease equal to 11%: during the decade considered, those who suffered the largest losses were sellers of fruit and vegetables (-24%) and meat (-17.4%); however, stores specialised in selling drinks grew significantly (+51.6%).
85% of sales in our region are made through large-scale distribution (LD) and are worth a total turnover of 11 billion euros (9% of the national total), and similar is the trend of the store types: in the last 3 years only large-scale distribution stores collected new market shares, to a lesser extent in Veneto than the rest of Italy, while other types of stores in the last 2 years lost 4 per cent in our Region (almost 2 in Italy).

STORES SELLING AGRIFOOD PRODUCTS
VENETO – YEARS 2001:2012

% VAR. OF SALES IN THE FOOD SECTOR
VENETO AND ITALY – YEARS 2009:2011



FOOD PRODUCT TRADE: QUANTITY OF SPECIALISED STORES PER TYPE
AND % VAR. COMPARED TO 2001. VENETO – YEAR 2012



Source: processing by the Region of Veneto – Directorate Regional Statistical System on data from the Osservatorio nazionale del commercio (National Observatory on Trade)

WEB Flash

ALSO AVAILABLE:
- Statistical Report 2013: Veneto, descriptions and comparisons
- Population Census 2011. First final data
- European Strategy 2020 – European and national indicators and targets

http://www.regione.veneto.it/web/statistica

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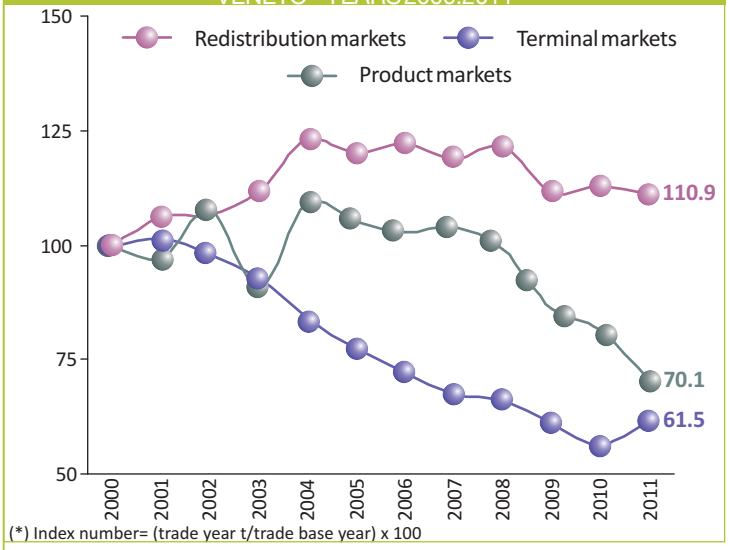
THE AGRIFOOD MARKETS

Veneto is distinguished by the presence of large facilities used for the collection and trade of agricultural products. Among these the following are of note: MAAP, the AgriFood Market of Padua, which ranks nationally in the top 10 markets for trade capacity and is a national leader for export mainly towards Eastern Countries; Veronamercato (Verona), which is located in the 'Quadrante Europa' area, the largest pole of structural and logistical investment at the national level, and Treviso Mercati. These three facilities convey over 80% of the goods that pass through the fruit and vegetable markets in Veneto (a little less than a million tons), made up of around 48% by vegetables, 35.6% by fresh fruit and 16% by citrus fruits. However, this value has been in continuous decline over the last 5 years, particularly with regards to terminal markets (or consumption) and product markets, whereas the quantities traded in the redistribution markets have increased by around 3.6%.

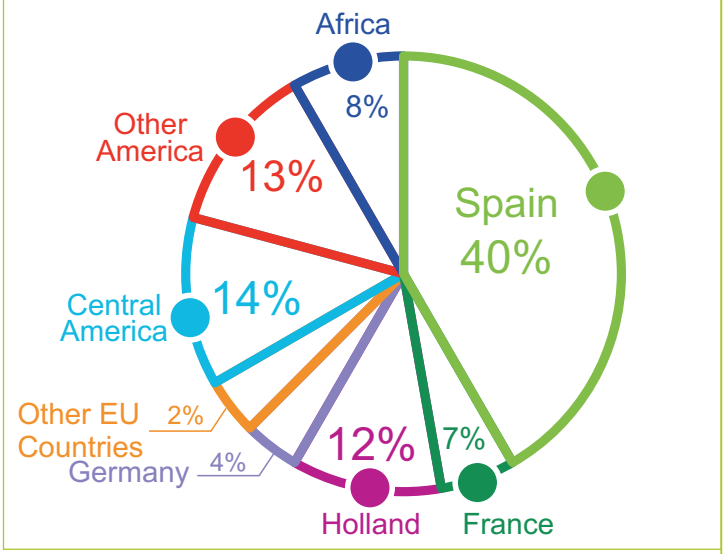
One of the main characteristics of the Veneto markets is that they serve as a platform from which to launch agricultural and food products. With regards to fruit and vegetables, the goods handled annually in the Veneto markets mostly come from other Italian regions (52%), whereas 26% are produced within regional borders and 23% are imported from abroad. Pertaining to the goods leaving these markets, 44% remain within the region and are distributed and consumed locally, 21% go to other Italian regions, especially the neighbouring regions, and 35% are launched onto foreign markets, taking advantage of the traffic corridors that link the North (Germany and Austria) and the East (Slovenia, Croatia and Romania, up to Russia).

INDEX NO. (*) OF WHOLESALE TRADE PER TYPE OF MARKET (BASE YEAR 2000). VENETO – YEARS 2000:2011

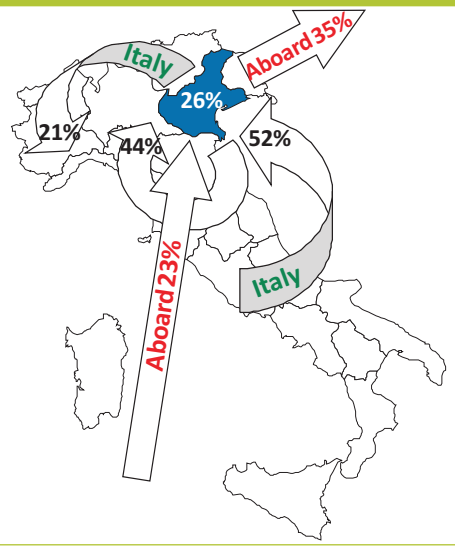


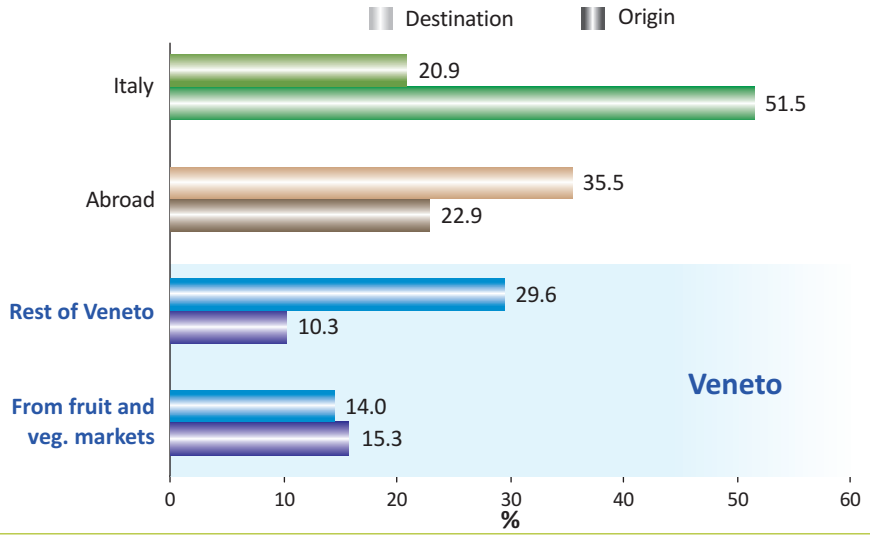
(*) Index number= (trade year t/trade base year) x 100

ORIGIN OF GOODS INTRODUCED INTO THE WHOLESALE MARKETS. VENETO – YEAR 2011



FLOW OF GOODS ENTERING AND LEAVING THE FRUIT AND VEGETABLE MARKETS (% OUT OF VOLUMES). VENETO – YEAR 2011





Source: processing by Veneto Agricoltura on data about the fruit and vegetable markets.

IMPORT AND EXPORT

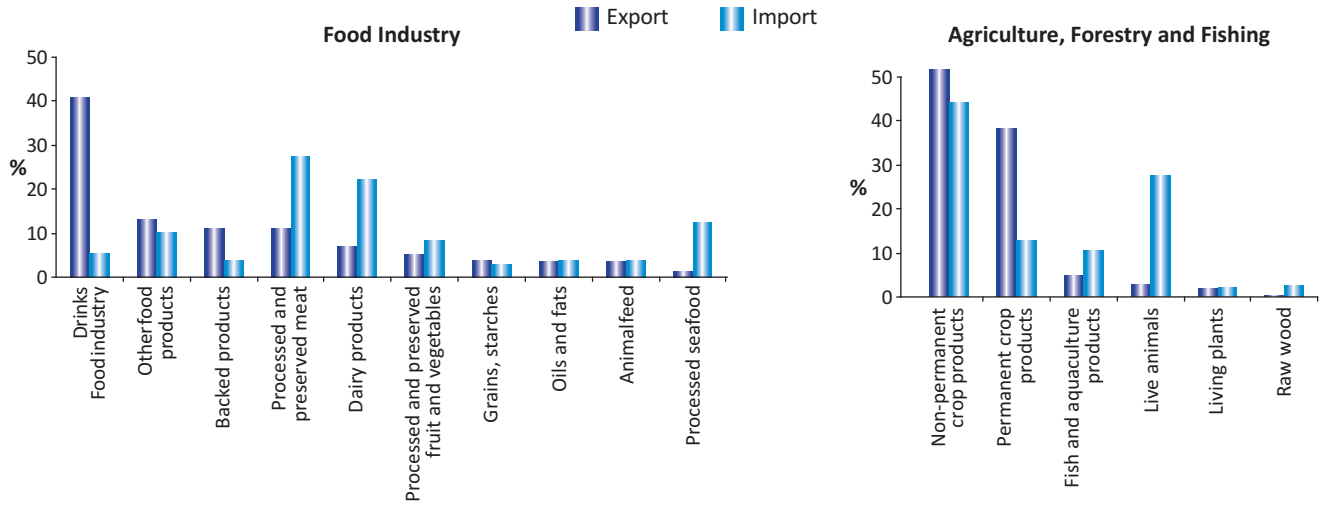
Contrary to the decline in domestic consumption and the decline in import, agrifood export is soaring. Veneto is demonstrating a strong propensity towards internationalisation: from 1991 to 2012 export of agrifood products increased almost seven fold, going from around 700 million euros to over 4.8 billion euros, and between 2011 and 2012 alone, export increased by 7.9%.

Our best sellers in the food industry are drinks in particular (primarily wine) which account for over 40% of the value, baked products and pasta; with regards to imports, we focus on processed meat and fish as well as dairy products (almost 2/3 of the total). In the agricultural sector, fruit and vegetables represent almost 90% of our export, while import mainly concerns live animals (27.5%) and fruit (44.3%).

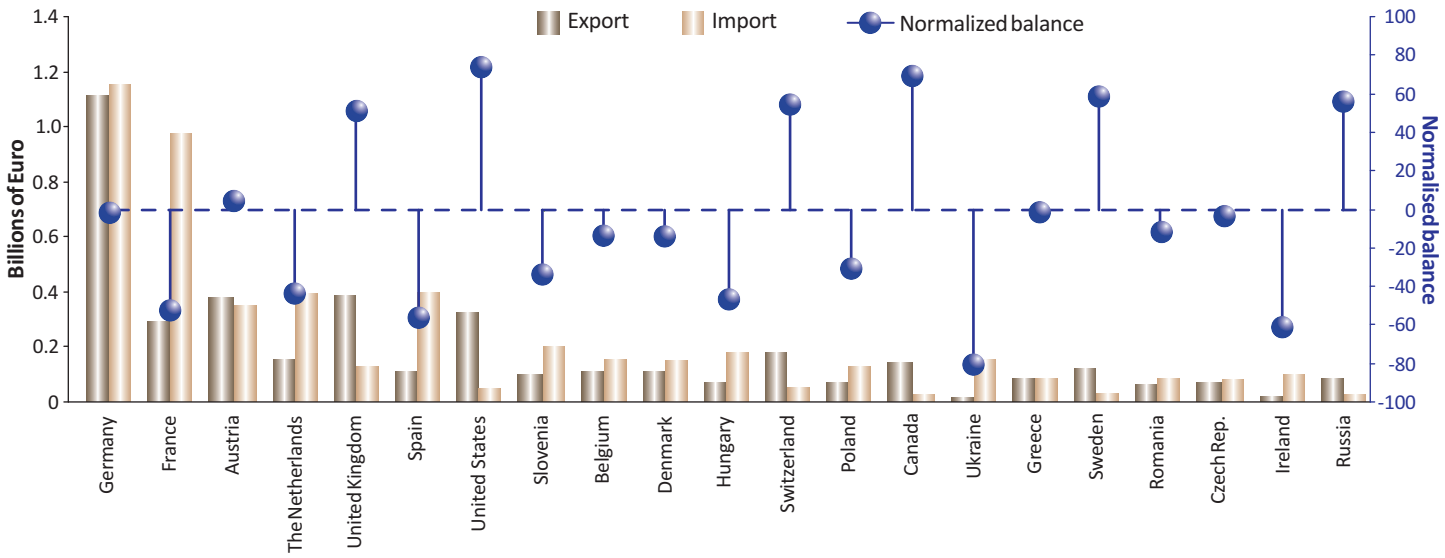
With regards to the destinations, our best buyers are Germany, the United Kingdom and Austria, with values increasing compared to the previous year, while our import partners are again Germany, and then France and Spain, with values in strong decline compared to 2011.

The normalised trade balance with these Countries shows a substantial equality with Germany and Austria, negative values with France, Spain and the Netherlands and very positive values for the United Kingdom, the United States and Canada. In reality, as we have just seen, Veneto boasts certain logistical centres in its territory that are of national relevance and the goods imported here are then distributed over the entire Italian territory. The trade balance of Veneto agrifood, historically negative but clearly directed towards a greater equilibrium, reflects our structural peculiarity.

% SHARE OF AGRIFOOD EXPORT AND IMPORT PER MAIN PRODUCT AND CATEGORY. VENETO – YEAR 2012 (*)



EXPORT, IMPORT AND NORMALISED TRADE BALANCE (**) OF THE TOP 20 PARTNER COUNTRIES. VENETO – YEAR 2012 (*)



(*) 2012 provisional data (**) The normalised trade balance is the percentage ratio between the current balance and the sum of export and import.

Source: processing by the Veneto Region – Directorate of Regional Statistical System on Istat data

STATISTICHE Flash

DIRECT SALES

With regards to the local market, direct sales are important for certain niche and high quality products, but the margins of improvement in this sector are still rather high. According to the data collected by the 2010 Agriculture Census, there are 9,949 farms in Veneto that make use of this marketing channel, a share equal to 8.3% of the total, the second lowest nationally. The percentage of businesses that use other sales channels, i.e. trade enterprises (46%) or associations (42.9%), is still much higher than direct sales.

However, a more detailed observation shows that direct sales is a rather significant phenomenon in some cases: such is the case, for example, for mountain farms, where the share of direct sales amounts to 21.4%, a value three time higher than farms located on the plains.

The analysis on the type of product sold led to further reveal that for some of these products, especially transformed products (wine, oil, cheese, honey and jams), the share of direct sales is very high, sometimes exceeding 50%.

% SHARE OF FARMS PER TYPE OF MARKETING CHANNEL USED AND ALTITUDE. VENETO – YEAR 2010

	Direct sales to the consumer in the farm	Direct sales to the consumer outside the farm	Sales to other farms	Sales to industrial enterprises	Sales to commercial enterprises	Sales or provision to associations
Veneto Per altitude area:	7.9	3.1	17.9	9.5	46.0	42.9
- mountain	21.4	9.4	25.9	12.5	41.9	35.2
- hills	13.8	4.4	24.8	10.7	30.5	53.7
- plains	6.0	2.5	16.0	9.1	49.7	40.8

% OF PRODUCT SOLD BY AGRICULTURAL FARMS BY TYPE OF PRODUCT AND MARKETING CHANNEL USED. VENETO – YEAR 2010

	Direct sales to the consume in the farm	Direct sales to the consumer outside the farm	Sales to other farms	Sales to industrial enterprises	Sales to commercial enterprises	Sales or provision to associations
Cereals	0.6	0.4	10.9	5.3	50.6	32.2
Industrial and protein plants	0.4	0.2	3.8	14.2	41.9	39.5
Horticultural products	19.2	6.9	2.8	4.6	40.4	26.1
Fruit	9.5	3.8	1.8	2.5	45.6	36.8
Wine grapes	1.2	0.4	11.8	4.7	6.1	75.9
Olives	14	2.8	17.9	19.1	13.8	32.3
Plants and flowers	47.6	17.9	13.1	1.1	17.8	2.5
Fodder	6.1	2.5	79.0	0.9	8.6	3.0
Live animals	11.4	3.6	8.6	19.6	50.1	6.8
Milk	1.4	1.4	1.8	27.2	15.0	53.3
Other animal products (eggs)	37.9	13.1	11.5	9.4	23.0	5.1
Wine	50.7	11.8	4.2	6.0	17.5	9.8
Oil	52.9	7.9	1.5	1.8	4.1	31.8
Cheese	69.0	13.9	3.0	2.8	7.5	3.7
Other products of animal origin	70.1	12.6	3.4	1.9	9.3	2.7
Other products of vegetable origin	52.0	11.6	8.1	4.6	17.3	6.5
Forest product	44.3	15.1	6.3	12.2	19.0	3.2

Source: processing by the Region of Veneto – Directorate of Regional Statistical System on Istat data

- Veneto Agricoltura
- Market Economy and Competitiveness Sector

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