



Friuli Venezia Giulia Food Industry

Focus: Wine



April
2020



Food & Beverage Industry in Italy

61,613 active enterprises (12.9% of the whole manufacturing sector)

471 thousand employees (11.7% of the whole manufacturing sector)

28.060* billion euro added value (10.8% of the whole manufacturing sector)

27,175 million euro food export value in 2019

26,567 milion euro food import value in 2019

9,345 million euro beverage export value in 2019

1,909 million euro beverage import value in 2019

() including tobacco production*

Source: InfoCamere, Istat



Food & Beverage Manufacturing Enterprises in Friuli Venezia Giulia (31st December 2019)

797 active food and beverage manufacturing enterprises

- Processing and preserving of meat and production of meat products
- Processing and preserving of fish, crustaceans and molluscs
- Processing and preserving of fruit and vegetables
- Manufacture of vegetable and animal oils and fats
- Manufacture of dairy products
- Manufacture of grain mill products, starches and starch products
- Manufacture of bakery and farinaceous products
- Manufacture of other food products (sugar, cocoa, chocolate, sugar confectionery, processing of tea and coffee, manufacture of condiments and seasonings, manufacture of prepared meals and dishes)
- Manufacture of prepared feeds for farm animals
- Manufacture of beverages

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on InfoCamere data.



Percentage Weight of F&B Industry on Total Friuli Venezia Giulia Economy

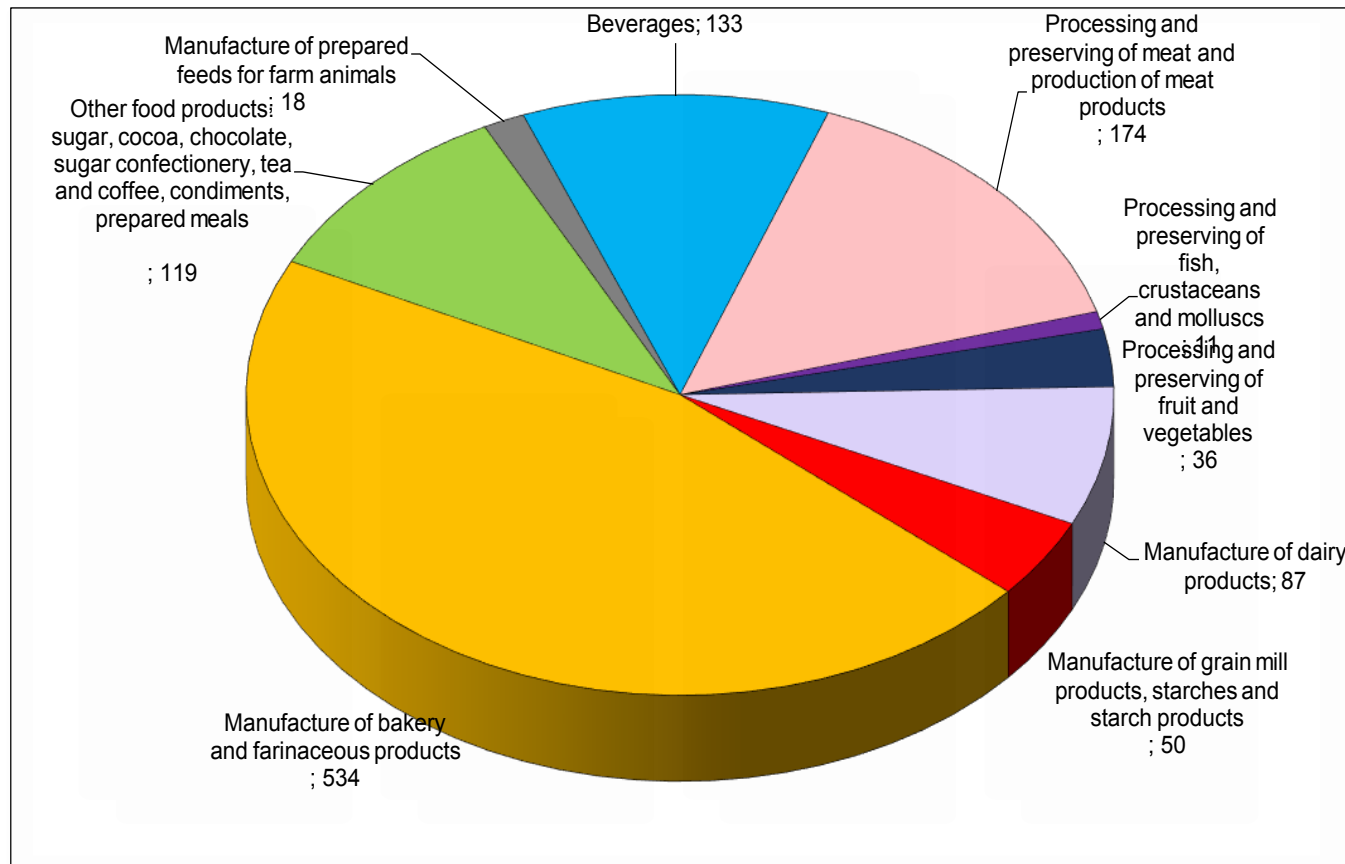
	Food & Beverage Industry	Total Manufacturing Industry	%
Active Local Units (31st December 2019)	1,162	12,140	9.7%
Employees	8,564	114,653	7.5%
Export 2019 (in million euro)	810.53	15,388 Total Economy	5.3%
Import 2019 (in million euro)	357.44	8,116 Total Economy	4.4%
Added Value (*) at basic prices (in million euro)	537.8	7,856	6.8%

(*) Food beverage and tobacco manufacture

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on InfoCamere data.



Active Local Units in Friuli Venezia Giulia by Manufacturing Specialisation (31st December 2019)



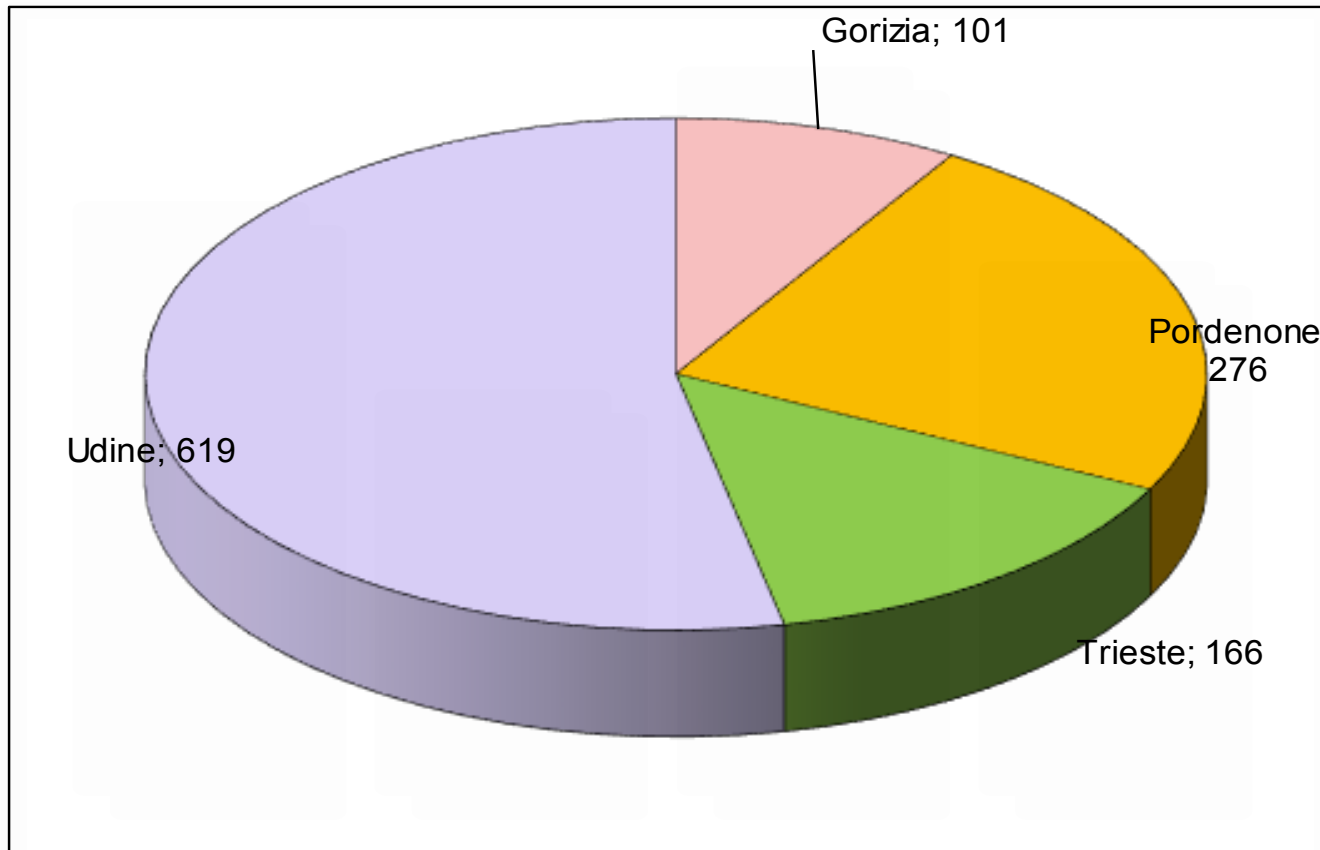
1,162 active enterprise local units in Friuli Venezia Giulia are thus sorted by activity:

- 174** Processing and preserving of meat
- 11** Processing and preserving of fish
- 36** Processing and preserving of fruit and vegetables
- 87** Dairy products
- 50** Grain mill products, starches and starch products
- 534** Bakery and farinaceous products
- 119** Sugar products, cocoa, chocolate, coffee, tea
- 18** Feeds for farm animals
- 133** Beverages

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on InfoCamere data.



Active Local Units in Friuli Venezia Giulia By Province (31st December 2019)



**1,162 F&B
Manufacturing Local
Units in FVG are thus
sorted by Province :**

619 Udine

276 Pordenone

166 Trieste

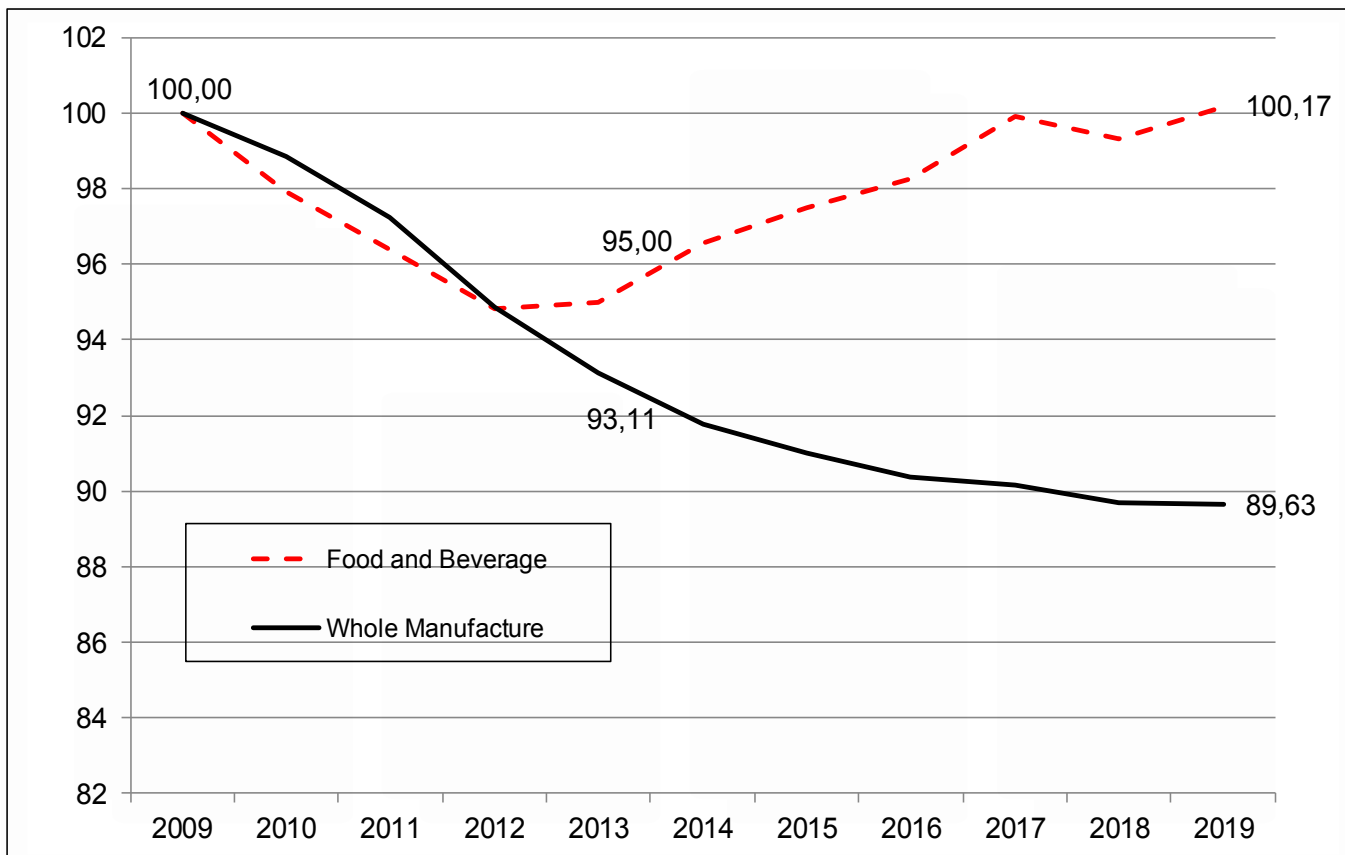
101 Gorizia

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on InfoCamere data.



Food & Beverage Industry in Friuli Venezia Giulia

Enterprise Local Unit Trend (Index Number Basis: 2009=100)



Over the past five years, F&B processing active local units grew from 1,020 in 2014, to 1,162 in 2019 (+42 units)

The opposite trend was recorded by the whole manufacturing sector, which suffered the loss of 290 active enterprise local units over the same period (2014-2019)

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on InfoCamere data.



Agro Industry Active Local Units by Municipality (31st December 2019)

	Municipality	Active Local Units	% on Whole Industry in Town
1	Trieste	131	13.4%
2	San Daniele del Friuli	61	39.9%
3	Udine	58	8.8%
4	Gorizia	34	15.8%
5	Pordenone	25	5.4%
6	Spilimbergo	23	17.2%
7	Latisana	17	14.4%
8	San Vito al Tagliamento	16	8.2%
9	Codroipo	16	10.6%
10	Fagagna	14	15.2%

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on InfoCamere data.



Food Export by Italian Region (2019)

Region	euro	%	2019/2018 % Var.
1. Emilia Romagna	5,358,522,941	19.72%	+5.15%
2. Lombardy	5,311,299,164	19.55%	+6.02%
3. Piedmont	3,813,154,529	14.03%	+5.87%
4. Veneto	3,576,733,278	13.16%	+2.80%
5. Campania	2,780,823,374	10.23%	+4.71%
6. Tuscany	1,090,727,148	4.01%	-5.21%
7. Trentino Alto Adige	917,478,049	3.38%	+2.38%
8. Puglia	749,231,862	2.76%	+2.18%
9. Friuli Venezia Giulia	651,130,537	2.40%	3.12%
Other Regions	2,925,446,777	10.76%	+2.5%
Italy	27,174,547,659	100.00%	+4.1%

Emilia Romagna and Lombardy accounted for 40% of Italian food export In 2019

Friuli Venezia Giulia ranked at the 9th place in the domestic score with 651 million food export

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on InfoCamere data.



Beverage Export by Italian Region (2019)

Region	euro	%	2019/18 % Var.
1. Veneto	2,636,745,511	28.22%	+3.08%
2. Piedmont	2,160,908,717	23.12%	+15.90%
3. Lombardy	1,176,853,751	12.59%	+6.77%
4. Tuscany	1,053,308,624	11.27%	+4.80%
5. Trentino-Alto Adige	604,637,519	6.47%	+4.28%
6. Emilia-Romagna	470,289,374	5.03%	+5.29%
7. Lazio	199,614,276	2.14%	+21.93%
8. Puglia	194,304,265	2.08%	-2.66%
9. Abruzzi	193,101,160	2.07%	+2.50%
10. Friuli Venezia Giulia	159,174,927	1.70%	+11.38%
Other Regions	495,719,028	5.30%	-0.56%
ITALY	9,344,657,152	100,00%	+6.8%

Veneto and
Piedmont
accounted for 50% of
Italian beverage export
In 2019

Friuli Venezia Giulia
ranked at the 10th
place in the national
score with 159 million
euro beverage export
value

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on InfoCamere data.



Friuli Venezia Giulia

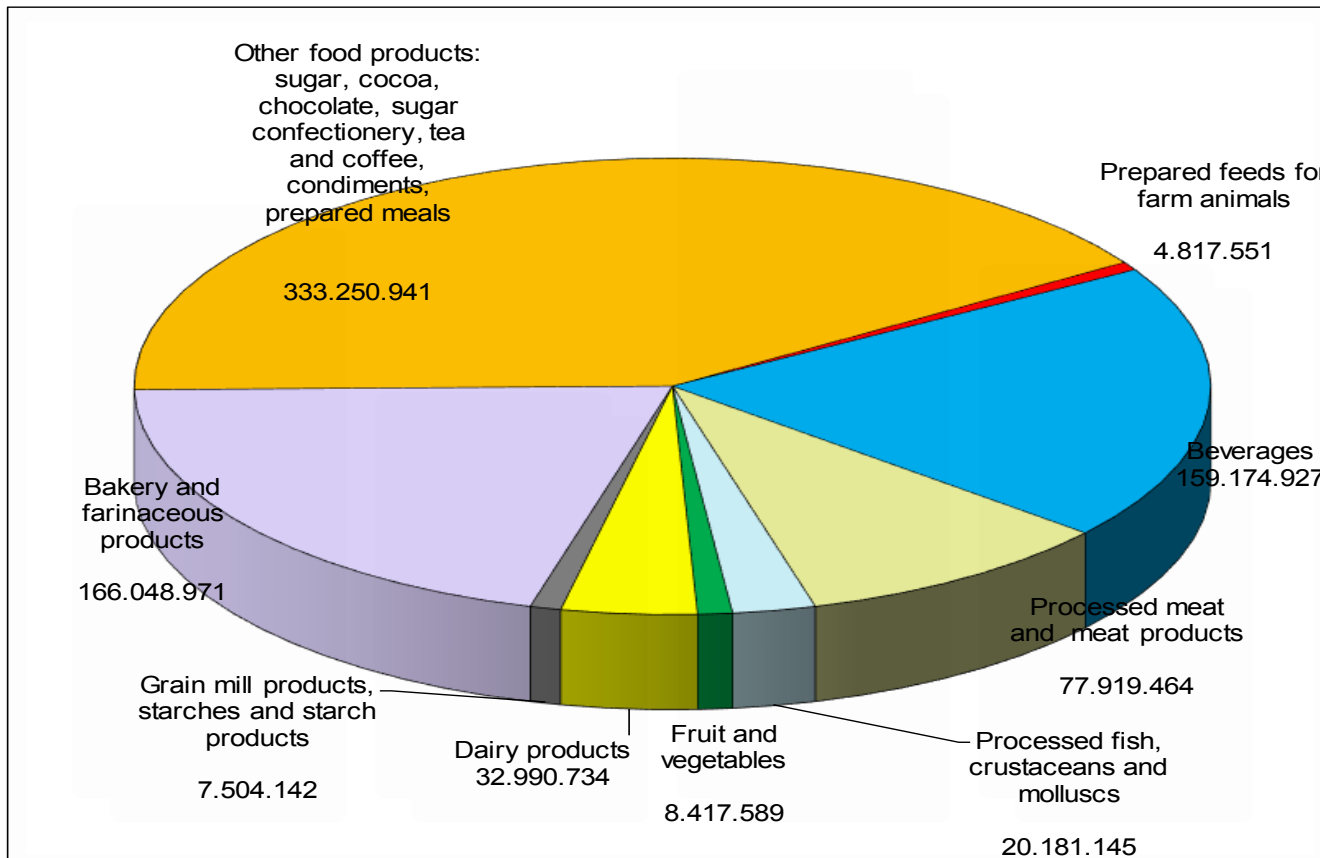
Food & Beverage Export (2008-2019 at current values)

Year	F&B		Beverage	
	euro	% Var.	euro	% Var.
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	722,614,352	+2.76%	133,116,064	+9.99%
2017	764,876,516	+5.85%	137,747,948	+3.48%
2018	774,350,069	+1.24%	142,911,931	+3.75%
2019	810,305,464	+4.64%	159,174,927	+11.38%

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on Istat data.



2019 FVG Food & Beverage Export by Product (euro)



**Friuli Venezia Giulia
F&B export totalled
810 million euro in 2019**

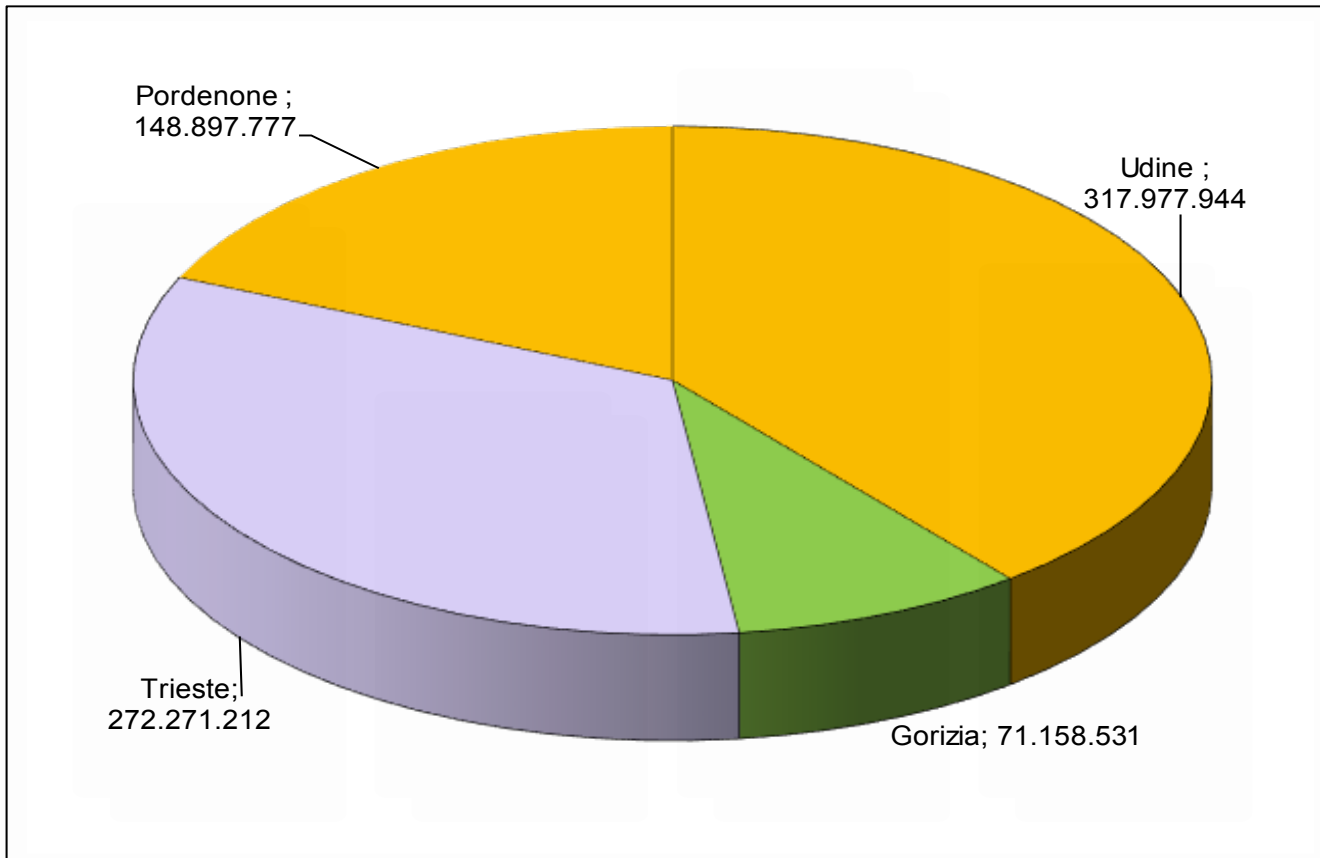
**41% of F&B export was
made up by Other food
products (sugar, cocoa,
chocolate, sugar
confectionery, tea and
coffee...)**

**Bakery and farinaceous
products recorded a
20.56% share, while
Beverages accounted
for 19.6%, and Meat
products represented a
9.6% share of the whole
F&B export**

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on Istat data.



2019 Food & Beverage Export by Province (euro)



**Friuli Venezia Giulia
F&B Export share by
Province:**

39.2% Udine

33.6% Trieste

18.4% Pordenone

8.8% Gorizia

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on Istat data.



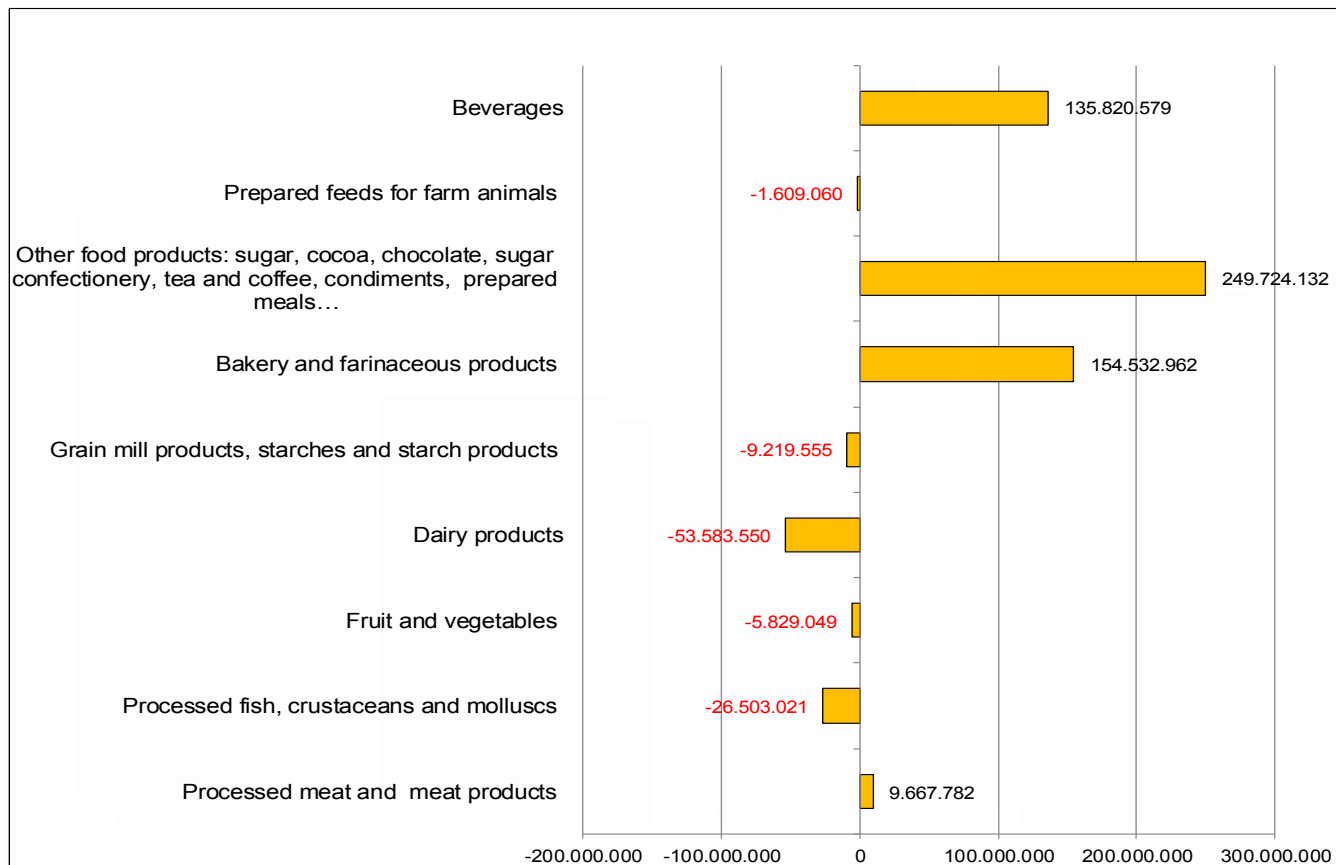
Friuli Venezia Giulia Food & Beverage Import (2008-2019)

Year	Food & Beverage		Food Products	
	euro	% Var. over the previous year	euro	% Var. over the previous year
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	315,348,542	+7.60%	292,519,143	+8.31%
2017	317,333,002	+0.63%	296,283,643	+1.29%
2018	345,254,896	+8.80%	324,066,274	+9.38%
2019	357,304,244	+3.49%	333,949,896	+3.05%

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on Istat data.



Friuli Venezia Giulia 2019 F&B Trade Balance (euro)



Friuli Venezia Giulia F&B trade balance scored +453 million euro in 2019.

Trade surpluses were recorded by:

**Processed Meat (+9.7 million euro)
Bakery and farinaceous products (+154 million)
Coffee, chocolate, sugar confectionery (+250 million)
Beverages (+136 million)**

**Trade deficits were recorded by:
Fish products (-26 million)
Dairy products (-53 million)**

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on Istat data.



Friuli Venezia Giulia – Food

Export Countries (Export 2019: 651 million euro in 120 Countries)

Top 10 Export Destination Countries	export in euro	% on total F&B export	2019/2018 %Var.
Germany	121,886,690	18.72%	+1.22%
United States	63,939,642	9.82%	-5.80%
France	53,886,484	8.28%	+10.05%
Austria	40,629,494	6.24%	-18.65%
United Kingdom	38,216,933	5.87%	+11.87%
Slovenia	33,759,801	5.18%	+1.40%
Greece	33,693,702	5.17%	+20.33%
Croatia	32,630,125	5.01%	-6.12%
Spain	18,009,928	2.77%	+1.80%
Netherlands	16,007,229	2.46%	+18.04%

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on Istat data.



Friuli Venezia Giulia – Beverage

Export Countries (2019: 159 million euro export towards 115 Countries)

Top 10 Beverage Export Destinations	export in euro	% on totale beverage export	2019/2018 % Var.
United States	41,449,005	26.04%	+2.85%
Germany	30,708,323	19.29%	+34.00%
United Kingdom	13,712,056	8.61%	+23.69%
Canada	7,580,543	4.76%	-2.06%
Netherlands	6,467,866	4.06%	+48.63%
Switzerland	6,185,849	3.89%	+1.02%
Spain	5,468,264	3.44%	+97.45%
China	4,555,621	2.86%	+11.30%
Austria	3,806,618	2.39%	-44.82%
Japan	3,643,899	2.29%	+2.37%

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on Istat data.



Friuli Venezia Giulia - Dairy Product

Import Countries (2019 import 86.5 million euro)

Top Supplying Countries	import in euro	% on total dairy import	2019/2018 % Var.
Germany	34,861,430	40.27%	+1.77%
Slovenia	14,153,609	16.35%	+42.85%
Belgium	9,564,671	11.05%	+15.44%
Austria	5,124,228	5.92%	+23.60%
Hungary	5,032,745	5.81%	+998.70%
Poland	4,320,218	4.99%	+9.72%
Netherlands	3,879,571	4.48%	+4.54%
France	3,307,379	3.82%	-41.45%
Lithuania	2,383,012	2.75%	-40.15%

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on Istat data.



Italian DOP and IGP Products

by Area (Protected Designation of Origin and Protected Geographical Indication established by EU)

Area/Region	Dop (*)	IGP (*)
North West	37	21
North East including:	42	43
<i>Trentino Alto Adige</i>	9	5
<i>Veneto</i>	19	19
<i>Friuli Venezia Giulia</i>	5	1
<i>Emilia Romagna</i>	20	25
Centre	36	29
South	68	44

EU and Italian rules define the area where each product may be produced and/or processed under DOP or IGP recognition

(*) The area of each recognized PDO or PGI may include one or more regions or territories

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on Istat data (December 2018).



Quality Products

- **Prosciutto di San Daniele**
<http://www.parcoalimentare.it>
<http://www.prosciuttosandaniele.it>
- **Vini doc, docg, igp**
<http://www.mtvfriulivg.it>
<http://www.federdocfvg.it>
- **Formaggio Montasio**
<http://www.formaggiomontasio.net>
- **Olio extravergine di Oliva Tergeste**
<http://www.tergestedop.it>
- **Mela del Friuli Venezia Giulia**
- **Brovada**



Innovation, Promotion and Vocational Training Agencies

Area Science Park Trieste

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

Universities

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

<http://www.uniud.it> (Udine)

CATAS SpA (including Chemical Product Test Lab)

<http://www.catas.it>

Scientific and Technological Park “Luigi Danieli” di Udine

<http://www.friulinnovazione.it>

Cluster Agroalimentare FVG Scarl - Agrifood FVG”

<https://www.agrifoodfvg.it/>

Consorzio del Prosciutto di San Daniele

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

Agro Food Vocational Training Centre of Friuli Venezia Giulia

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



Top Food Enterprises in terms of Turnover

Illycaffè Spa (Trieste), Roncadin Spa (Meduno), Oleificio San Giorgio Spa (San Giorgio di Nogaro), Quality Food Group Spa (Martignacco), Bouvard Italia spa (Fagagna), Morgante Spa (San Daniele del Friuli), La Giulia Spa (Gorizia), Venchiaredo Spa (Sesto al Reghena), Framon Spa (San Daniele del Friuli), Leoncini Prosciutti Spa (San Daniele del Friuli), Compagnia delle Carni Srl (Gorizia), Jolanda De Colò Spa (Palmanova), Società di Macinazione Spa (Pordenone), Latte Carso Spa (Villesse), Latteria Montanari srl (Villesse), Pezzetta Srl (Fagagna), Prosciuttificio Wolf spa (Sauris), Filiera Uno Prosciutti srl (San Daniele del Friuli), Gelcarni srl (Pordenone), F.Ili Menis srl (Artegna)

Source: Top 500, NordEst Economia, Messaggero Veneto (November 2019)



Top Beverage F&B Enterprises by Turnover

Birra Castello Spa (San Giorgio di Nogaro), Goccia di Carnia Srl (Forni Avoltri), Gruppo Vitivinicolo Fantinel Spa (Spilimbergo), Nonino distillatori Spa (Pavia di Udine), Sorgente Valcimoliana srl (Cimolais), Martellozzo Piera Spa (San Quirino), CIEMME Liquori Spa (Gorizia).

Source: Top 500, NordEst Economia, Messaggero Veneto (novembre 2019)



FOCUS

Wine Production



Global Wine Consumption

Top 10 Countries (Year 2018 estimates)

Paese	(in milioni di hl)	% on total
1 United States	33.0	13.41%
2 France	26.8	10.89%
3 Italy	22.4	9.11%
4 Germany	20.0	8.13%
5 China	17.6	7.15%
6 United Kingdom	12.4	5.04%
7 Russia	11.9	4.84%
8 Spain	10.5	4.27%
9 Argentina	8.4	3.41%
10 Australia	6.0	2.44%

Global wine consumption reached 246 million hectolitres in 2018

US was the largest market and recorded a strong increase together with Russia in 2018

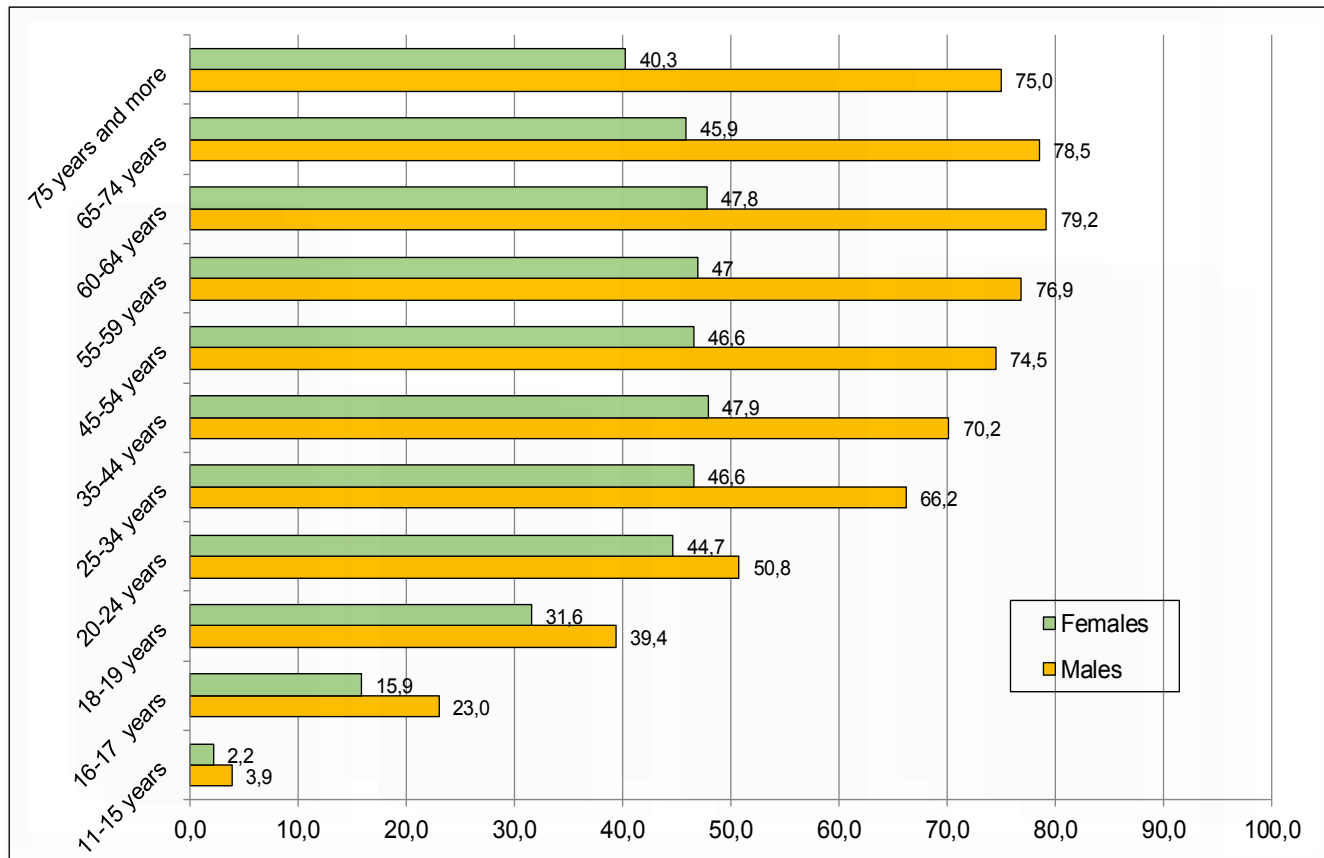
In 2018 US were followed by France and Italy in terms of wine consumption

Wine consumption in Italy reached 22/23 million hl in 2018

Source: elaborations on OIV 2019 Statistical report on World vitiviniculture



Italian Wine Consumers by Gender and Age - Year 2018 (on a sample of 100 people of the same gender and age class)



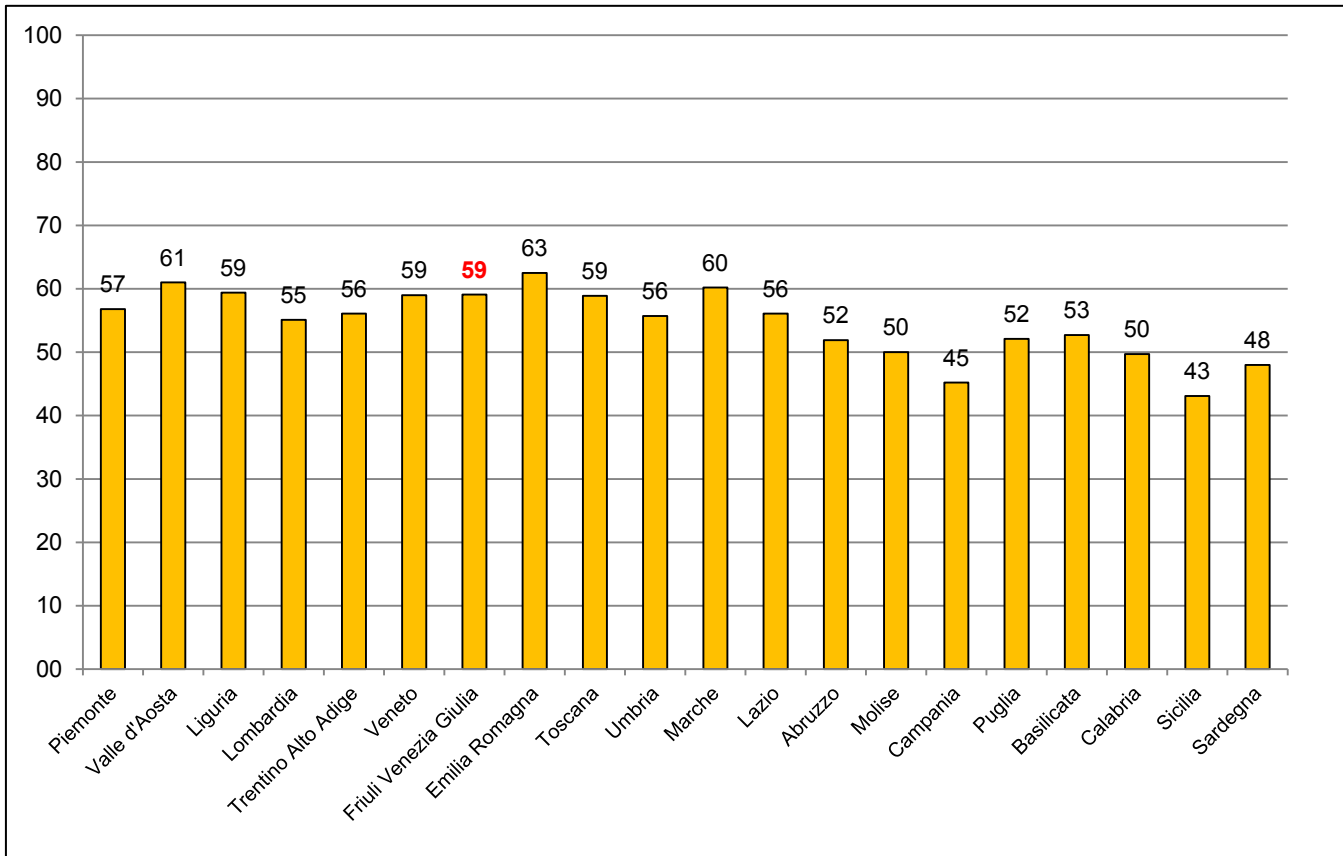
54.1% of Italian population consumes alcoholic beverages

Occasional wine consumption is growing. Italians traditionally used to drink wine during meals, but nowadays the consumption of alcoholic beverages outside from meals is growing.

Source: elaborations on Istat data (Il consumo di alcol in Italia: anno 2018, 15 May 2019)



Italian Wine Consumers by Region: Year 2018 (on a sample of 100 people from the same region)



60% of North East
population drink wine

...but only 21% drink
wine every day

Source: elaborations on Istat data (Il consumo di alcol in Italia: anno 2018, 15 May 2019)



Global Wine Production

Top 10 Countries (Year 2018-estimates)

Country	(in milioni hl)	% on total	2018/17 % Var.
1 Italy	54.8	18.77%	+28.94%
2 France	48.6	16.64%	+33.15%
3 Spain	44.4	15.21%	+36.62%
4 United States	23.9	8.18%	+2.58%
5 Australia	14.5	4.97%	+22.88%
6 Argentina	12.9	4.42%	-5.84%
7 Chile	12.9	4.42%	+35.79%
8 Germany	10.3	3.53%	+37.33%
9 South Africa	9.5	3.25%	-12.04%
10 China	9.1	3.12%	-21.55%

OIV estimates put world wine production at 292 million hl in 2018 (+18% as against 2017)

With a 55 million hl output, Italy was the first wine producing country in 2018 (+30% as against 2017),

followed by France with 49 million hl (+33%),

and Spain with 45 million hl (+37%)

Source: elaborations on OIV 2019 Statistical report on World vitiviniculture



Global Wine Market

(Year 2018)

Export Countries	million euro
France	9,336
ITALY	6,148
Spain	2,916
Australia	1,829
Chile	1,680
United States	1,226
Germany	1,032
New Zealand	1,011
Portugal	804
Argentina	674
South Africa	663

Global wine trade reached 108 million hectolitres and 31.3 billion euro in 2018

Import Countries	million euro
United States	5.255
United Kingdom	3.510
Germany	2.620
China	2.415
Canada	1.693
Japan	1.419
Netherlands	1.162
Belgium	9751
France	939
Russia	895

Source: elaborations on OIV 2019 Press release 11 April 2019



Top Italian Grape Wine Destination Countries (Export 2019: 6,435,453.87 thousand euro)

	euro	% share on total export	% var. 2019/2018
United States	1,540,676,270	23.94%	+5.37%
Germany	1,064,103,601	16.54%	+2.45%
United Kingdom	770,950,703	11.98%	-5.00%
Switzerland	381,559,462	5.93%	+1.61%
Canada	341,993,944	5.31%	+2.58%
France	202,903,707	3.15%	+6.54%
Japan	183,312,140	2.85%	+12.98%
Sweden	178,022,298	2.77%	0.80%
Netherlands	167,113,956	2.60%	8.85%

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on Istat data.



Grape Wine Export by Region (2019)

Region	Thousand euro	% share on total export	% variation on 2018
1 Veneto	2,313,940	35.96%	+3.22%
2 Piedmont	1,058,909	16.45%	+4.19%
3 Tuscany	1,019,685	15.84%	+4.42%
4 Trentino-Alto Adige	555,454	8.63%	+4.38%
5 Emilia Romagna	323,893	5.03%	-0.05%
6 Lombardy	284,280	4.42%	+4.22%
7 Abruzzo	187,573	2.91%	+2.20%
8 Puglia	157,563	2.45%	-2.99%
9 Sicily	135,597	2.11%	-3.17%
10 Friuli-Venezia Giulia	130,200	2.02%	+9.27%

Export of Italian “Grape Wines” reached 6.4 billion euro in 2019

Veneto, Piedmont and Tuscany accounted for 68% of domestic export

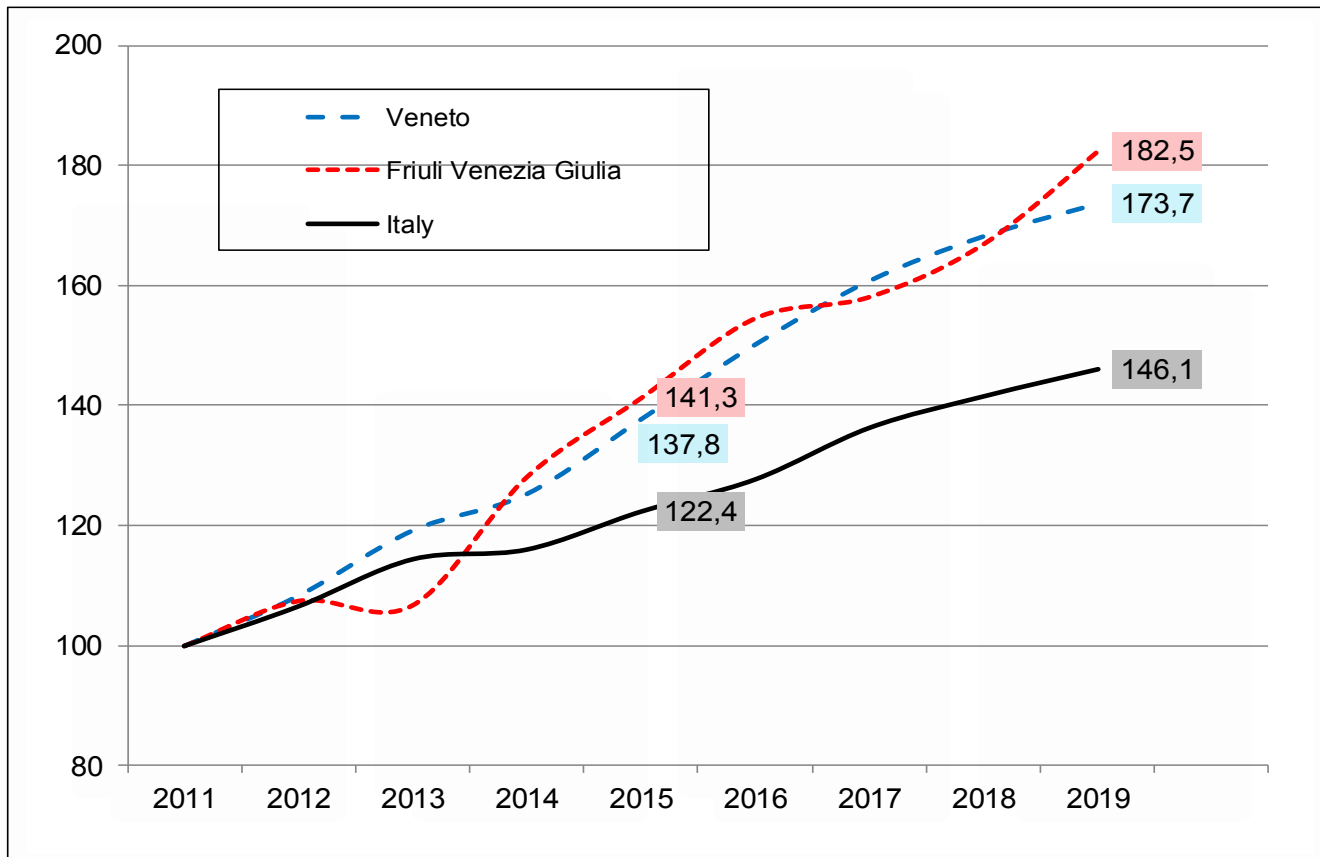
Friuli Venezia Giulia occupies place 10 in the ranking by exporting region (2% of Italian export)

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on Istat data.



Grape Wine Export Trend

(Friuli Venezia Giulia, Veneto and Italy. Index Number Basis: 2011=100)



Friuli Venezia Giulia “Grape Wine” export grew from 71 million euro in 2011 to 130 million euro in 2019 at current prices

The major forward leaps took place in 2014-2015 and 2019

Export of Italian wine has been booming over the past few years, and the positive trend has been led by Veneto, Tuscany, Friuli Venezia Giulia, and Piedmont

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on Istat data.



Wine Production Enterprises- Active Local Units

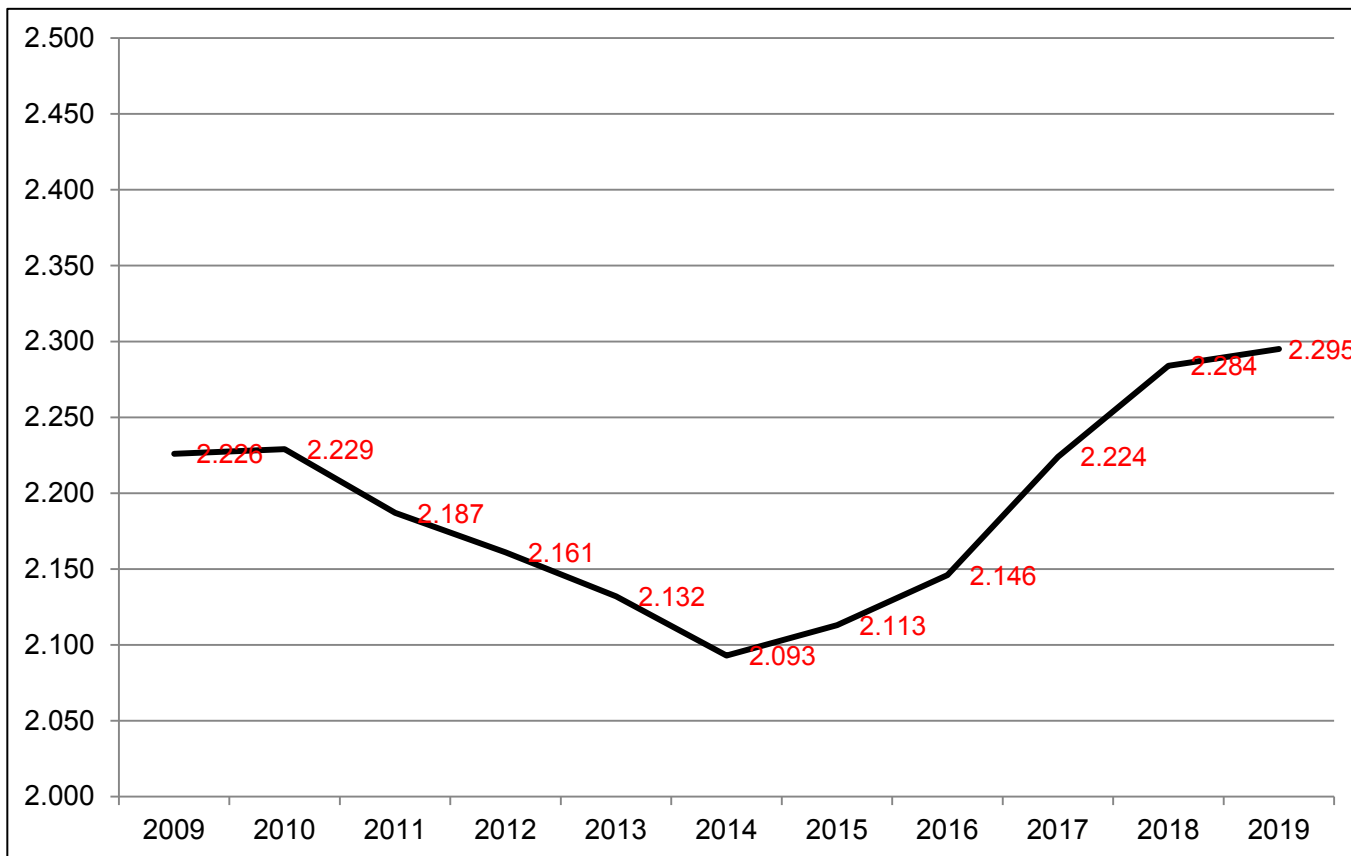
Friuli Venezia Giulia (31st December 2019)

	Wine Growing	Wine Production
Friuli Venezia Giulia	2,295	62
Gorizia	531	9
Pordenone	888	27
Trieste	180	3
Udine	695	23

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on InfoCamere data.



Wine Production Enterprises Friuli Venezia Giulia Trend



2,295 enterprises in Friuli Venezia Giulia are classified as «Wine Growing», including 2,095 registered seats and 200 branches

1,504 of such registered enterprises are «Sole Proprietorships».

Source: elaborations of Pordenone-Udine Chamber of Commerce Research Centre on InfoCamere data.



Wholesale Prices of Main Friuli Venezia Giulia Wines

	March 2019	September 2019	March 2020
Cabernet franc (DOC Grave, Aquileia, Annia, Latisana)	120 euro/hl	120 euro/hl	120 euro/hl
Sauvignon (Friuli Colli Orientali)	180 euro/hl	180 euro/hl	180 euro/hl
Friulano (Friuli Colli Orientali)	160 euro/hl	160 euro/hl	160 euro/hl
Merlot (Friuli Colli Orientali)	130 euro/hl	130 euro/hl	130 euro/hl
Pinot grigio IGT delle Venezie	110 euro/hl	90 euro/hl	90 euro/hl
Friulano (DOC Grave, Aquileia, Annia, Latisana)	110 euro/hl	110 euro/hl	110 euro/hl

Source: Pordenone-Udine Chamber of Commerce



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