

4.4.7 Italy

4.4.7.1 Demographics

The number of poultry farms in Italy was estimated at 11,690. About 62% or 7,231 poultry farms were household or micro-producer chicken farms (Figure 141). The next largest share of poultry farms were commercial chicken farms, representing 14% or 1,649 of the total poultry farms. Approximately 13% or 1,530 poultry farms were turkey farms. The smallest share of poultry farms were duck farms. About 11% or 1,280 of poultry farms in Italy were duck farms.

The average size duck farm was 201 ducks. The average size turkey farm was 8,723 head. Household or micro-producer chicken farms had an average 53 head. The average number of chickens on commercial farms was 60,164 head.

Poultry production and consumption in Italy has increased since 2010. Poultry production totaled 1.4 million metric tons in 2019, an increase of 17% compared to 2010 (see Figure 142). Poultry consumption in 2019 was 1.1 million metric tons in 2019. Consumption of poultry in Italy has increased 8%.

Of the 167.6 million head in Italy's poultry stocks during 2020, 154 million were chickens, 13.3 million were turkeys, and 257,000 were ducks (Table 40).

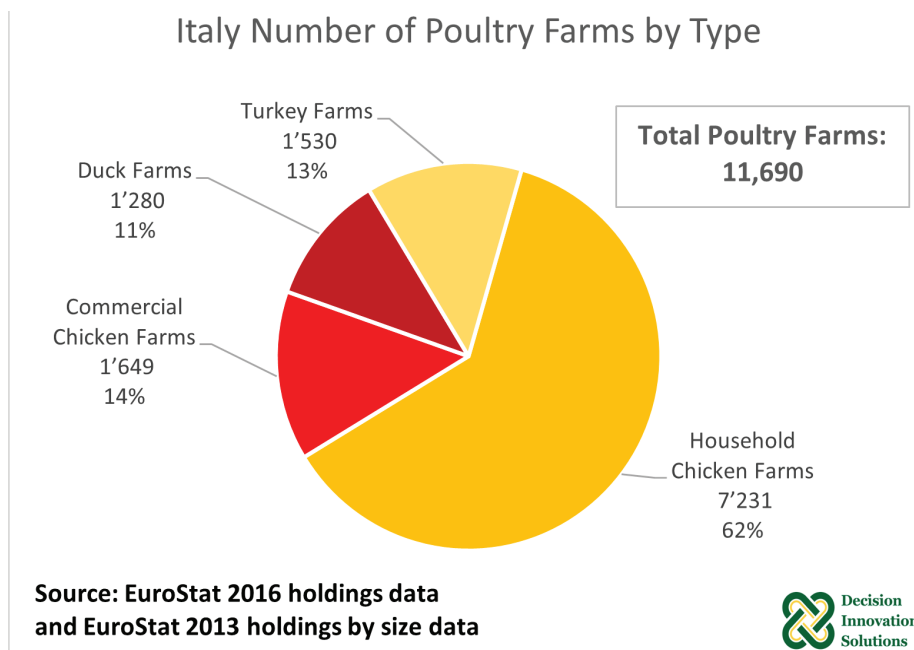


Figure 141. Italy number of poultry farms by type

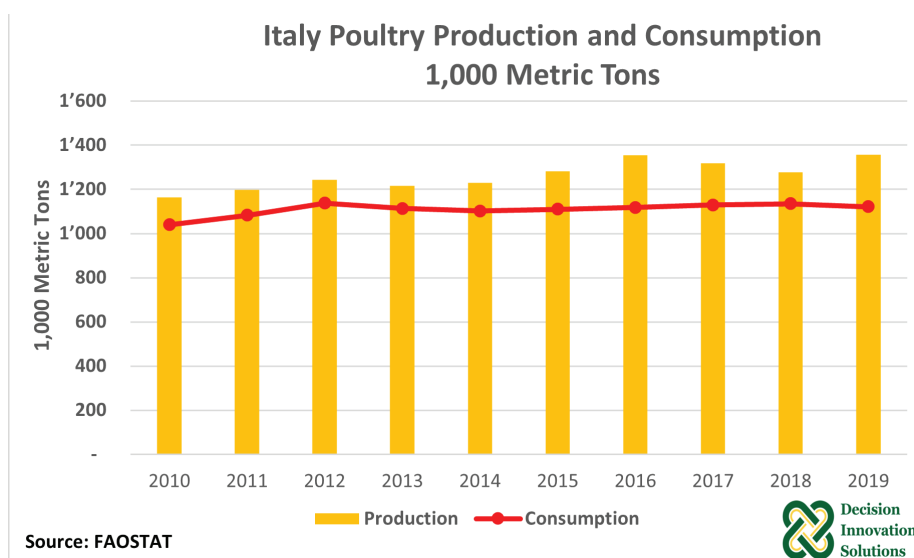


Figure 142. Italy poultry production & consumption

ITALY POULTRY STOCKS, SLAUGHTER, AND PRODUCTION					
1,000 head	Chickens	Ducks	Turkeys	Total	
Stocks	154'000	257	13'346	167'603	
Producing Animals/Slaughtered	573'846	714	29'431	603'991	
Production (1,000 MT)	1'067	2	313	1'382	

Sources: FAO, 2020

Table 40. Italy poultry stocks, slaughter & production

Poultry slaughter totaled 604.1 head. Chicken slaughter was estimated at 573.8 million head. Turkey slaughter was an estimated 29.4 million head. Duck slaughter was 714,000 head. Since 2010, Italy's chicken slaughter increased 17%. Turkey slaughter increased 4%.

Poultry production included 1.1 million chickens, 313,000 metric tons of turkeys, and 2,000 ducks. Since 2010, chicken production increased 23% and turkey production increased 5%.

4.4.7.2 GDP and Value of Production

The total GDP value of Italy was estimated at \$1.9 trillion in 2020. About 97% of the total GDP was produced by non-agricultural sectors. Crop production, valued at \$31.1 billion, represented about 2% of the total GDP. Red meat production represented about 1% or \$15.6 billion. Although less than 1% of Italy's total GDP, chicken production contributed \$2.2 billion to the total. Turkey production was valued at \$465.8 million (Figure 143).

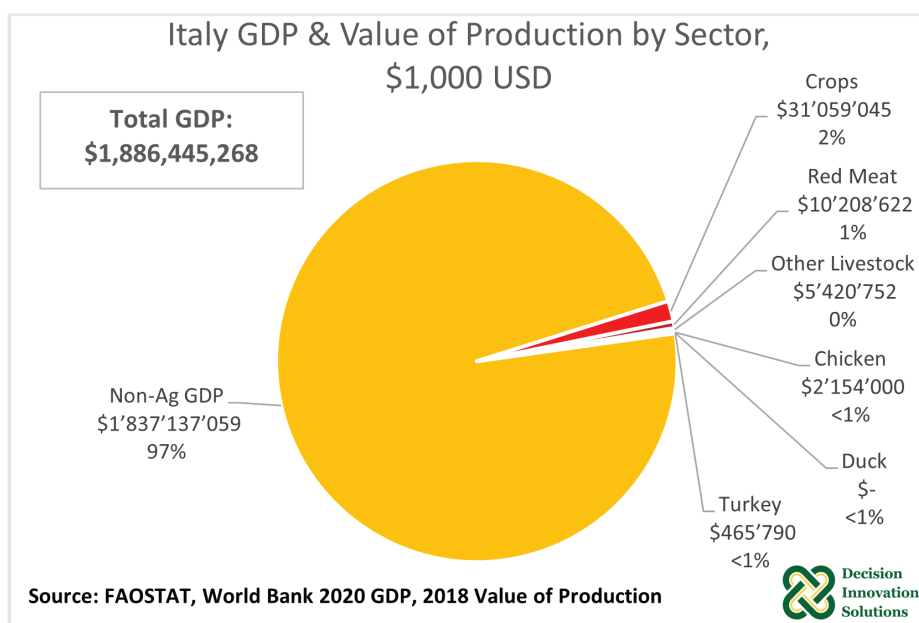


Figure 143. Italy GDP & value of production by sector

ECONOMIC EFFECTS - ITALY (\$1,000 USD)				
	Direct	Indirect	Total	Taxes paid*
All agriculture	\$49'308'209	\$62'811'518	\$112'119'727	\$1'036'492
Livestock	\$18'249'164	\$23'246'792	\$41'495'956	\$383'610
Poultry	\$2'619'790	\$4'571'534	\$7'191'324	\$44'027
Chicken	\$2'154'000	\$3'758'730	\$5'912'730	\$36'199
Duck	-	-	-	-
Turkey	\$465'790	\$812'804	\$1'278'594	\$7'828

Source: FAOSTAT, OECD Input-Output Tables. *Taxes is equal to total taxes net of subsidies

Table 41. Economic effects - Italy

The combined (direct and indirect) effects of agricultural production in Italy are estimated to be \$112.1 billion. Of this amount, \$7.2 billion comes from the poultry industry, with \$5.9 billion from chicken meat production and \$1.3 billion from turkey production. Agriculture pays a net value of \$1.0 billion in taxes, \$44.0 million of which is estimated to be from the poultry industry (Table 41).

4.4.7.3 Labor

The total number of people in Italy's labor force was 25.1 million in 2020 (see Table 42). By gender, males represented 58% or 15.1 million of the total labor force. Females represented 42% of the total labor force. More than 24.2 million individuals worked in non-agricultural sectors. The remaining 898,007 worked in agriculture. Poultry production labor totaled 47,544 in 2020.

In 2020, an estimated 59,796 people were employed in Italy's meat processing sector. The total wages earned from meat processing was \$2.1 billion. Livestock meat processing was the largest share of meat processing with 47,585 jobs and \$1.7 billion in wages earned. Poultry meat processing accounted for 12,211 jobs and \$424.9 million in wages earned.

AGRICULTURAL LABOR FORCE CHARACTERISTICS - ITALY			
	Total	Female	Male
Total Country Labor	25'137'672	10'679'248	14'458'424
Non-Agricultural Labor	24'239'665	10'445'679	13'793'986
Agricultural Labor	898'007	233'569	664'438
Total Non-Poultry Agricultural Labor	850'464		
Total Poultry Labor	47'544		
Chicken Labor	39'090		
Turkey Labor	8'453		
Other Poultry Labor	-		
Wages (\$1,000 USD)			
Total Meat Processing Labor	59'796	\$2'080'723	
Livestock Processing Labor	47'585	\$1'655'802	
Poultry Processing Labor	12'211	\$424'921	

Source: ILO 2020, World Bank 2020, UNIDO Database, INDSTAT 4 2021, ISIC Revision 3

Table 42. Agricultural labor force characteristics - Italy

4.4.7.4 Cost of Production

By far the largest component of the cost of broiler production in Italy was feed at 65% of total costs in 2017. Three components together, day-old chicks (17%), other variables cost (heating, electricity, litter, and animal health, 9%) and housing (6%), accounted about one third of total costs. Labor and general costs (i.e., insurance, booking, consultancy, telephone, and transport) made up the lowest share of total cost with a share of 3% and 1%, respectively (see Figure 144).

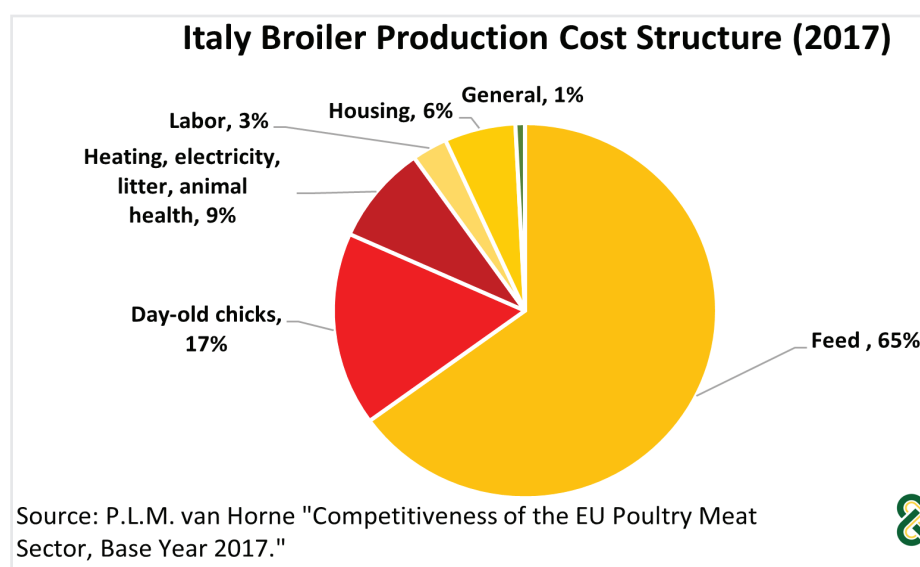


Figure 144. Italy broiler production cost structure

4.4.7.5 Trade

Germany was by far the main market for Italy's poultry meat exports in 2020. Italy exported more than \$183 million in poultry meat to Germany equivalent to about 51,801 MT. The value of poultry products exported by Italy to its top ten destinations reached more than \$348.5 million (see Figure 145 and Figure 146).

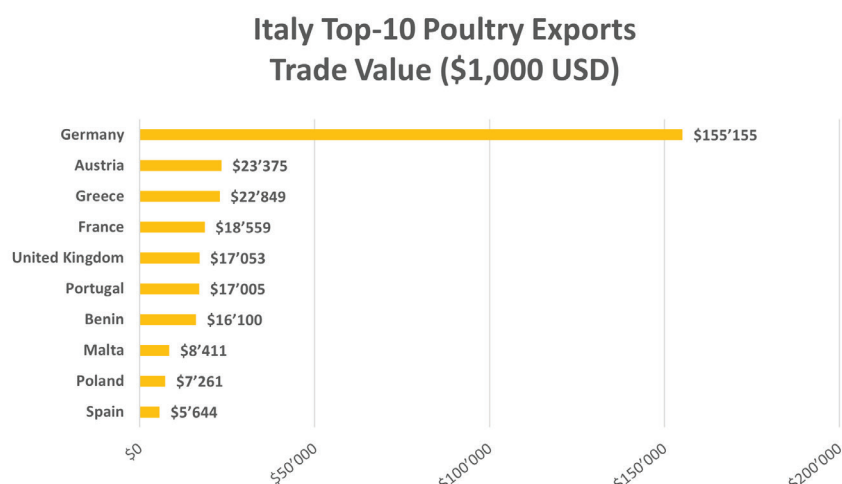


Figure 145. Italy top 10 poultry exports, trade value

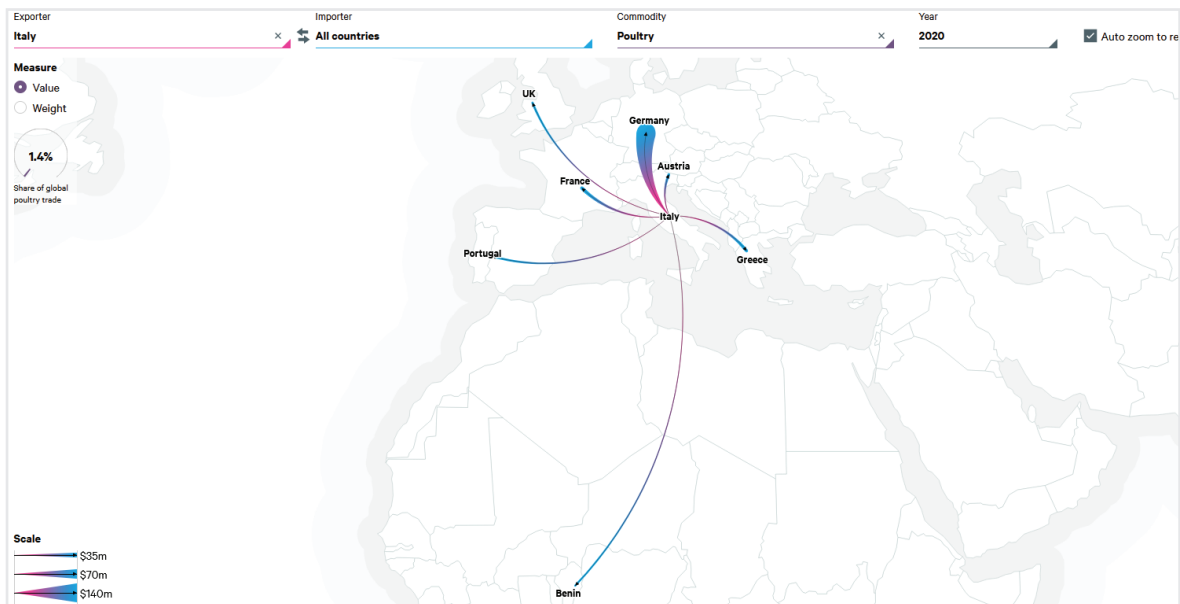
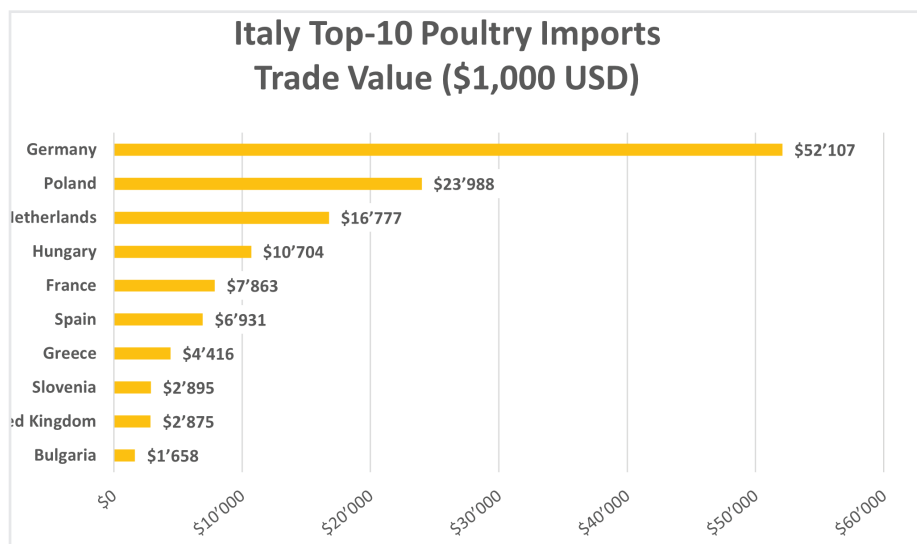


Figure 146. Italy poultry export flows



Italy imported from Germany, its main supplier of poultry meat in 2020, more than 32,656 MT of poultry meat valued at \$76.4 million. Overall, Italy imported 83,285 MT of poultry meat with an estimated value of \$208.4 million. Ninety four percent of those imports were sourced from the top ten suppliers of poultry meat to Italy in 2020 (see Figure 147 and Figure 148).

Figure 147. Italy top 10 poultry imports, trade value

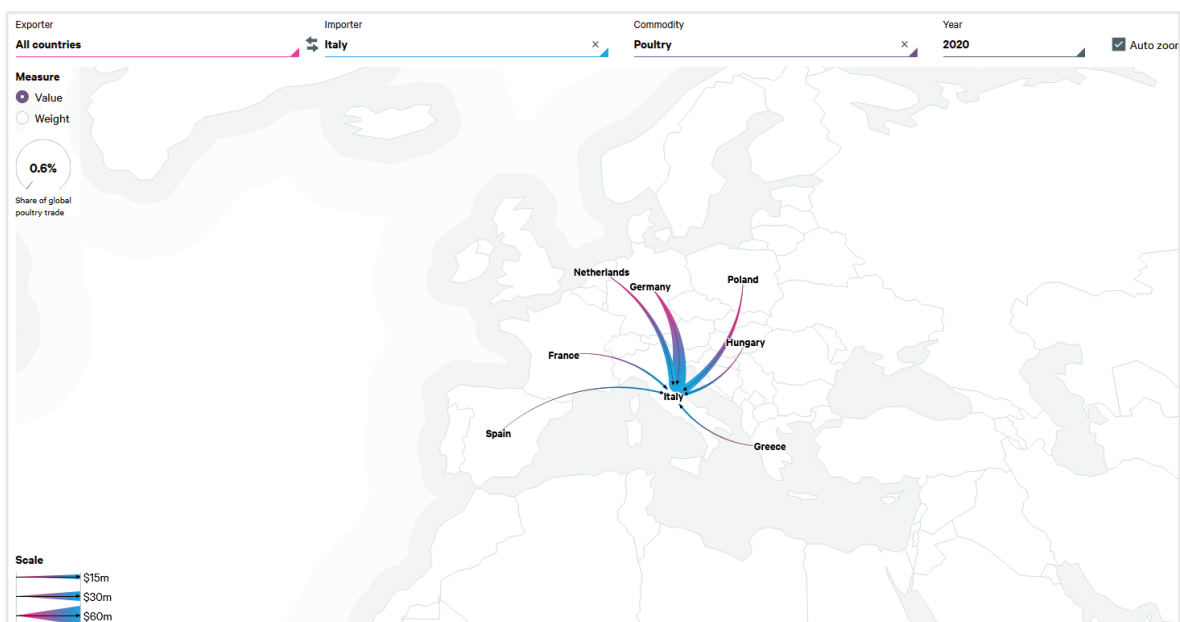


Figure 148. Italy top 10 poultry exports, trade value