

The Food Industry in Italy

M. Bonetti, N. Hadjidimitriou, M. Peroni, A. Zanoli
University of Bologna

13.1 INTRODUCTION

The food industry plays an important role in the manufacturing industry because it is the third most important sector (9.5%), behind the mechanical and the textile sectors. It has specific characteristics and is deeply settled in the Italian productivity sector. Consequently, the trend of the food industry is affected by the recent bad results of the Italian economic sector. In the last years the Italian food industry has been characterized by greater connections to the agri-food system and to the food chain.

For better analyzing the Italian agri-food system, it is necessary to consider jointly all the parts of the system: agriculture, food industry and food distribution (retail trade). In fact, these components are closely related, therefore the development of each component influences the development of the others.

The economic value of the agri-food sector at basic prices for the 2003 has been estimated by INEA¹ to be around 203 billion euro (15.6% of the GDP). The main components are: commerce and distribution at 70 billion euro (34.5%),

¹ National Institute of the Agrarian Economy.

the added value of the catering industry with 31.6 billion euro (15.5%), the agricultural added value with 30.9 billion euro (15.2%) and the added value from the food industry with 26.6 billion euro (13.1%). If we consider these data at current prices, the value would be different: the value of the agri-food sector would be around 208 billion euro, the agricultural added value 28 billion euro and the food industry 34.8 billion euro.

This kind of division among the agri-food components has been determined by the transformation processes, which happened after the Second World War and have characterized the evolution of the food chain's elements. For example, during the years 1951-2003, the ratio between agricultural production and domestic food consumption, that evidences the importance of agriculture in the food industry and the agricultural distribution (Malassis 1995), has decreased from more than 60% to less than 40%.

As the years go by, the agri-food sector has been characterized by the growth of a great number of industrial groups, mainly foreign. In addition, the emerging of agri-food districts put in evidence the specialization and the localization of the enterprises in some particular Italian areas.

The relation between agriculture and agri-food industry has been progressively changed, particularly between local agricultural output and transformation. In fact, this last relation is not so strong as in the past, because of the territorial specialization of the Italian agriculture and of the growing integration with other European agricultures. For example, the food industry is often characterized by the transformation of the basic products which come from both European countries and the other world countries.

Table 13.1 Turnover of the Italian food-industry (2003)

Sector	Turnover 2003 (million euro)
Dairy products	13,500
Confectionery	10,050
Wine	7,390
Processed meat	7,165
Beef	5,300
Animal feed	4,300
Poultry	4,600
Pasta	3,170
Preserved vegetables	3,500
Mineral water	3,000
Oils	2,900
Milling industry	2,700
Coffee	2,000
Frozen foods	1,905
Soft drinks	1,700
Beer	1,680
Diet and child products	1,165
Sugar	860
Fruit juice	923
Rice	800
Fish products	841
Other products	23,551
Total	103,000

Source: Federalimentare and Istat.

At the same time, it has been a strong development of the large-scale retail trade that has reduced the old traditional trade structure, which in the past protected the Italian agri-food sector from the growing competition of European countries.

Now it is ever more important for the success of the Italian agri-food sector to make good use of each food chain's component, looking to satisfy the changes and the differentiation of the food consumption models.

In 2003, the turnover of the Italian food-industry was 103 billion euro, with an increase of 5.1% on 2002. Dairy represents the main production (13.1%), then confectionery (9.8%), wine (7.2%) and processed meat (7.0%) (table 13.1 and figure 13.1). One of the characteristics of Italian production is the great diversification, in fact there is not a predominant cultivation, but there is much relevant production, even in the same areas. For example, if we consider Emilia-Romagna, one of the most important Italian agricultural regions, located in the North-East, we can identify three main productions: dairy and processed beef in the Western part, fruit and vegetables in the Central-Eastern part and the poultry in the Eastern part.

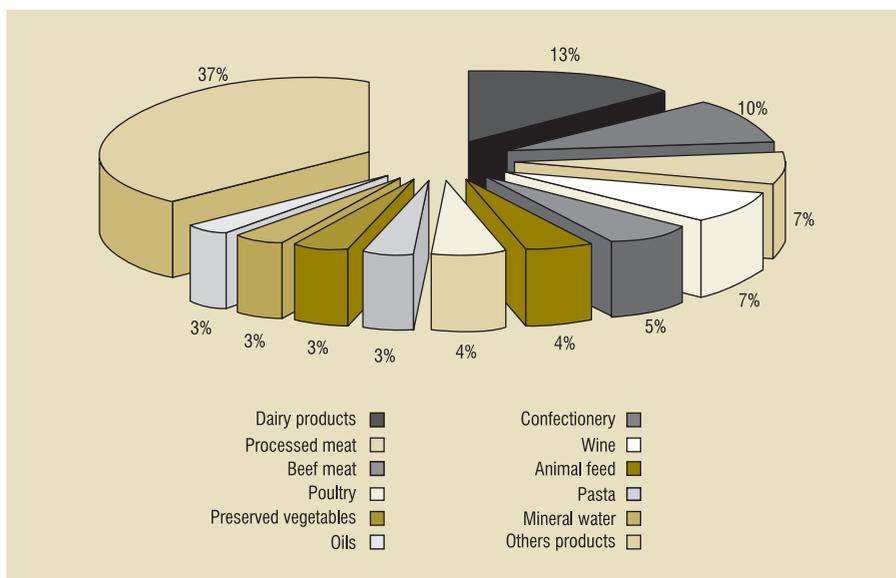


Figure 13.1 Turnover of the Italian food-industry (Percentage Distribution)

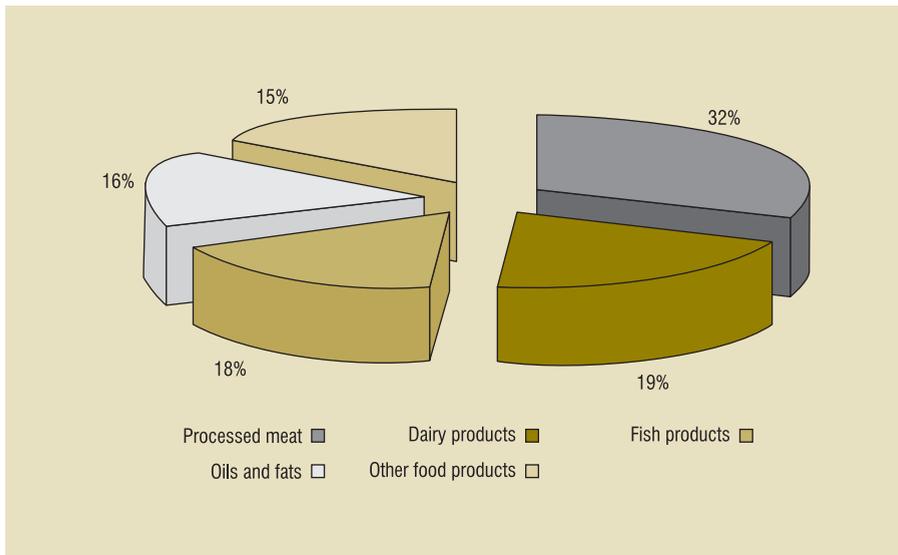
In order to evaluate the role of the Italian food-industry in respect to other countries, particularly the EU, we consider the data on import-export food-industry in 2003. The imports reached 17,338 million euro whereas the exports reached 14,883 million euro with a negative balance of 2.5 billion euro, even if this balance has reduced during the last years. Besides, we have to consider that the imports include some non food products, which means that the Italian food-industry sector is not so weak as it could seem looking only at the data.

Table 13.2 Italian food-industry: imports-exports (2003)

Imports		Exports	
Subsector	Million euro	Subsector	Million euro
Processed meat	4,422.3	Other food products	4,070.8
Dairy products	2,714.6	Beverages	3,776.3
Fish products	2,456.1	Processed fruits and vegetables	1,979.3
Oils and fats	2,274.6	Processed meat	1,444.8
Other food products	2,104.4	Dairy products	1,395.5
Total food-industry	17,338.1	Total food-industry	14,882.0

Source: Istat.

In table 13.2 and figure 13.2 we can observe the distribution among the different sub-sectors of the food-industry. The highest value of imports is given by the processed meat sub-sector, which is over 4.4 billion euro (32%). It follows, the dairy products with 2.7 billion euro (19%) and the fish products with 2.5 billion euro (18%).

**Figure 13.2** Italian food-industry: imports (2003)

Source: Istat.

In 2003, 77% of the Italian food-industry's imports came from the EU-15; the other import partners are Germany (20%), France (15%) and Spain (10%), whereas the imports from Greece are around 3%.

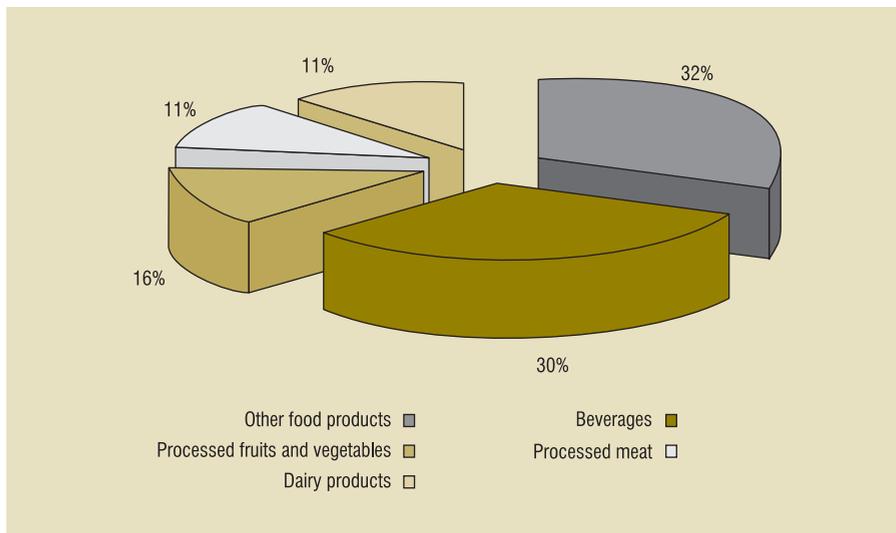


Figure 13.3 Italian food-industry: exports (2003)

Source: Istat.

The “other foods products” sub-sector (table 13.2 and figure 13.3) has the highest value of exports that is over 4 billion euro (32%). Others sub-sectors are: “beverages” with 3.7 billion euro (30%) and “processed fruits and vegetables” with 1.9 billion euro (16%). In 2003, 62% of the Italian food-industry's exports has gone to the EU-15; the most important export partners were Germany (19%) and France (13%), and the United States (12%). The exports to Greece were 3%.

13.2 DAIRY PRODUCTS

The “dairy” sub-sector - including the milk and cheese products - represents the most important Italian productive sector in terms of turnover.

The number of enterprises of this sub-sector, reported on the Industrial and Service Census (2001), is 3,987 (6%) and the number of employees is 54,936

(12%). Looking at the LUs (Local Units)² those are 4,817, while the number of LUs' employees is 52,542. It follows that the dairy production represents 7% of the total number of LUs and the 12% of the total of employees.

The “dairy” sub-sector plays a relevant role in two regions: Emilia-Romagna (20% of LUs and 16% of employees) and Campania (16% of LU and 11% of employees). In fact Emilia-Romagna is famous for the cheese “Parmigiano-Reggiano” and Campania for a particular cheese product known as “Mozzarella”. It is interesting to notice, that the “Parmigiano Reggiano” is a union of small enterprises that are located in the same area between the provinces of Parma and Reggio-Emilia. This fact confirms the localization and the specialization of the Italian food-industry in some particular areas.

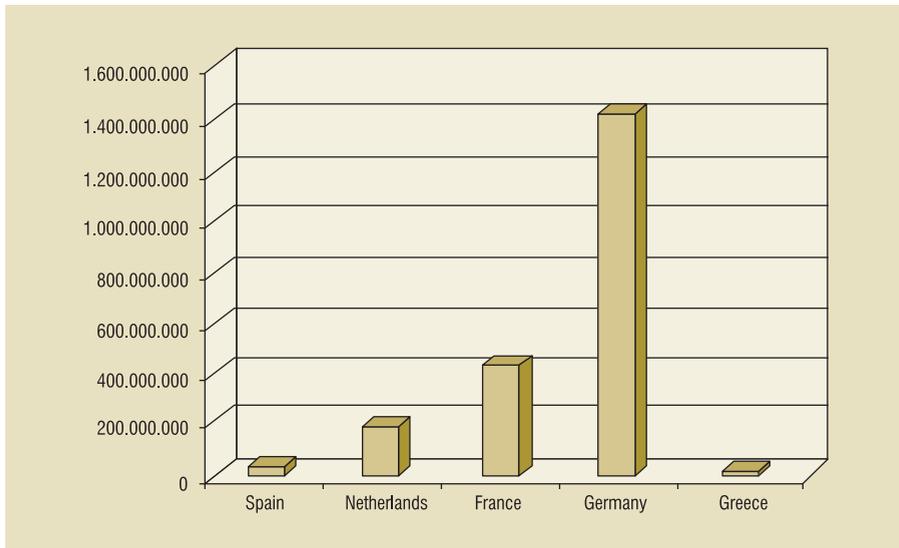


Figure 13.4 Dairy products: imports 2003 (euro)

Source: Istat.

At the end of 2003, a great crisis happened in this sector because of the failure of “Parmalat”, the biggest Italian enterprise in milk products. This collapse has created problems not only to this sector but to the whole economy as well.

² A Local Unit is an establishment of an enterprises.

Nowadays, the most important enterprises are: “Galbani”, “Danone” and finally “Granarolo” which is trying to incorporate Parmalat after its failure. The expenditure for dairy products represents 14% of the total food expenditure. Italy’s imports of dairy products are 2.7 billion euro, 96%, of which are from the EU-15 countries. The main EU-import partners are: Germany (54%) and France (18%) (figure 13.4).

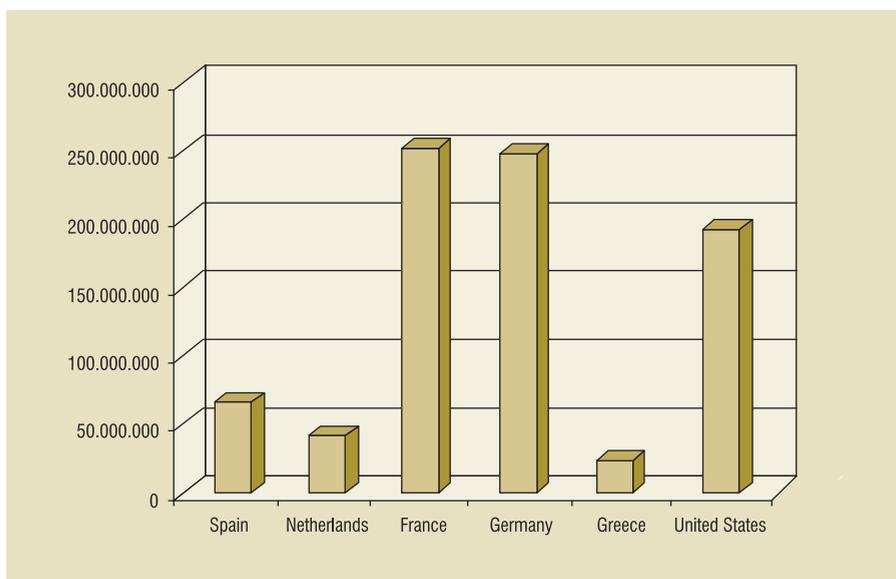


Figure 13.5 Dairy products: exports 2003 (euro)

Source: Istat.

On the other hand, Italy exports 1.4 billion euro of dairy products, 71% of which goes to the EU-15 countries. The main EU-export partners are: France (26%) and Germany (25%). The exports to the United States are relevant because they reach 190 million euro (figure 13.5).

13.3 BEVERAGES

“Beverages” are another relevant sub-sector of the Italian food-industry. The most significant production is wine, which is one of the most typical Italian productions and the most exported kind of beverage (70%).

The number of enterprises, based on the Industrial and Service Census (2001) is 3,005 (4%) and the number of employees is 37,858 (8%). The LUs of this sub-sector are 3,550, while the number of employees is 37,384. It follows that the “beverages” sector represents 5% of the all LUs and 8% of the total employed which confirms the relevance, talking in terms of employment, of this kind of production.

The most relevant enterprises are “Campari”, “Coca Cola Italia”, “San Benedetto” and “Heiniken Italia”. None of those enterprises produce wine because it is mainly produced and sold by many small enterprises, which are collected in cooperatives. The main producer of beverages is Veneto (North-East of Italy).

Ninety-three per cent of the 1.2 billion euro of “beverages” was imported by Italy from the EU-15 countries. The main EU-import partners are again France (26%) and Germany (20%) (figure 13.6).

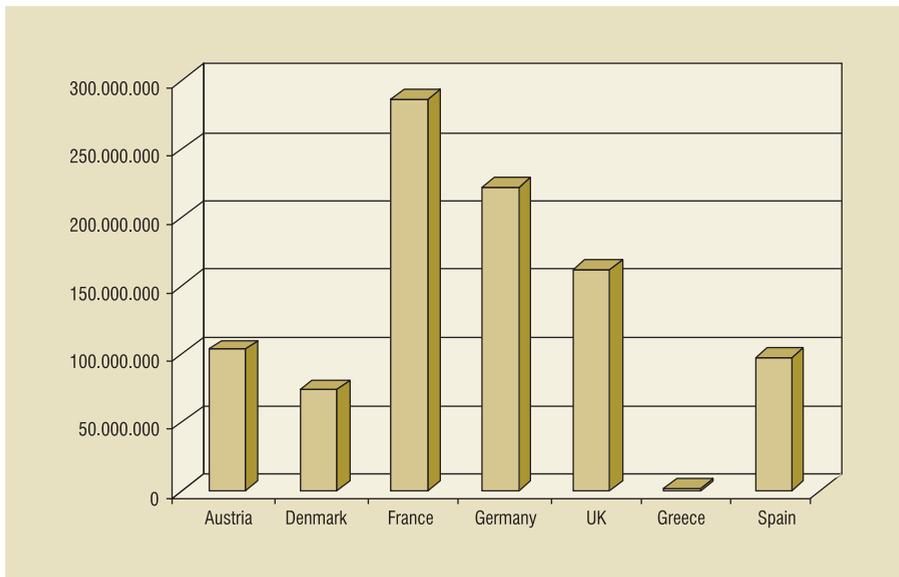


Figure 13.6 Beverages: imports 2003 (euro)

Source: Istat.

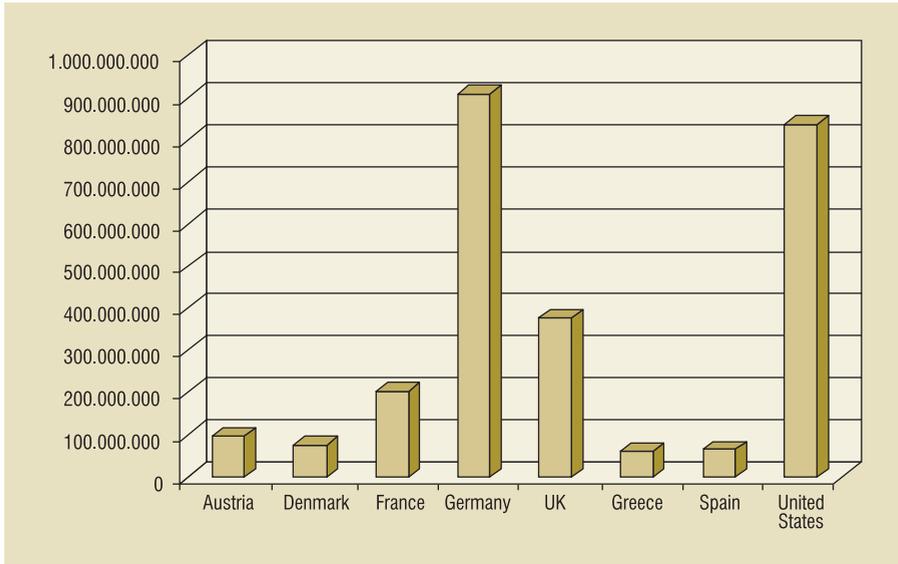


Figure 13.7 Beverages: exports 2003 (euro)

Source: Istat.

On the other hand Italy exports 3.7 billion euro of beverages, 55% of which are to the EU-15. The main EU-export partners are: Germany (44%) then, the UK (18%). The exports to the United States are very relevant, the value is in fact only lower than to Germany, with 836 million euro (figure 13.7).

Italy exports a lot of wine (2.7 billion euro), principally to United States (710 million euro, 26%), to the Germany (706 million euro, 26%), which represents the principal EU-partner (49%), and to the UK (295 million euro).

Concerning the domestic market, beverages expenditure was 9% of total expenditure in 2003.

13.4 PROCESSED MEAT

Meat consumption plays an important role into the Italian agri-food system. This sub-sector's production which decreased because of the BSE crisis (2001), in these last years has registered growth, showing that the crisis is ending. We could suppose that the consumers are no longer afraid to eat beef. Meat is the main expenditure in food consumption, indeed it is 22% of the total.

The number of enterprises, based on the Industrial and Service Census (2001) is 3,672 (5%) and the number of employees is 57,769 (13%). If we consider the LUs and the employees of this sub-sector of the food-industry, it results that the LUs are 4,302 and the employees 58,264. It follows that the “processed meat” represents the 6% of the LUs and the 13% of the employees. Emilia-Romagna is the main region concerned with the processed meat (for example Parma Ham). Emilia-Romagna has in fact the 25% of LUs and 30% of employees; Lombardia follows with 16% of LUs and 19% of employees. The most relevant enterprises are “Arena”, “Inalca”, “Fiorucci” and “Unibon”. “Parma Ham” is produced by a group of small enterprises in the same areas, which are included in a consortium.

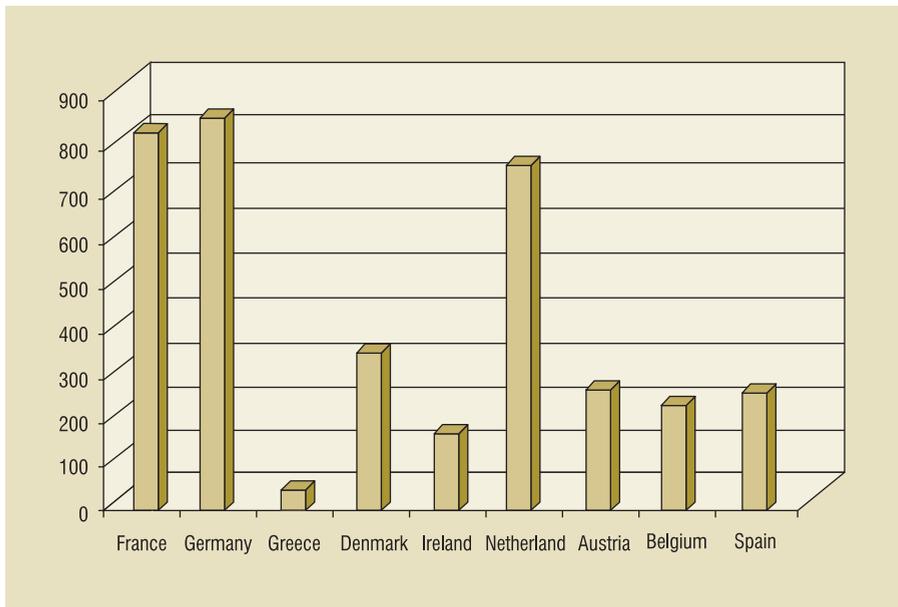


Figure 13.8 Processed meat: imports 2003 (million euro)

Source: Istat.

To forecast the role and the importance of this sub-sector, we will evaluate the role of the Italian meat sector in respect to other countries, particularly the EU. Looking at the imports and the exports of the meat sub-sector, we can observe that processed meat is important in terms of both imports and exports. Italy imports 4.4 billion euro of processed meat, 81% of which are imported

by the EU-15 countries. The main EU-import's partners are again: Germany (23%), France (22%), than the Netherlands (20%) (figure 13.8).

Furthermore, Italy exports 1.4 billion euro of processed meat 78% of which are directed to the EU-15 countries. The main EU-export partners are: France (24%) and Germany (23%) (figure 13.9).

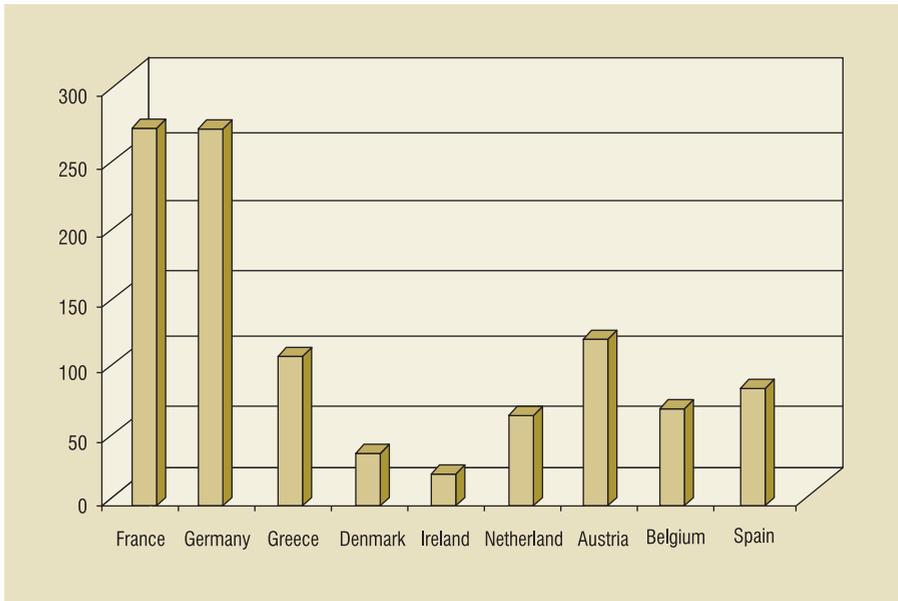


Figure 13.9 Processed meat: exports 2003 (million euro)

Source: Istat.

The main productions in this sub-sector can be classified in two typical categories: beef meat and poultry. Pig production is very important too and it is derived by different cooperatives: “Parma Ham” and “San Daniele Ham”. These cooperatives are located in the North-East of Italy. “Parma Ham” is produced in Emilia-Romagna and San Daniele Ham is produced in Friuli-Venezia Giulia. The second kind of production is poultry, which is developing in the same regions of the North East Italy, where ham is produced. Another important district of processed meat is Norcia (Central Italy), that has become famous because of its special products.

13.5 FRUITS AND VEGETABLES

Processed fruits and vegetables is an important sub-sector of the Italian food industry. In the last few years the sector has been restructured because the general decrease of prices and because the globalisation of the markets. The sub-sector is relevant also because the 18% of the total food expenditure are on fruits and vegetables.

The number of enterprises, based on the Industrial and Service Census (2001) is 1,933 (3%) and the number of employees is 30,317 (7%). The LUs of the “fruits and vegetables” sub-sector are 2,233, 3% of the whole food industry. In those LUs are employed 31,499 people (7% of the total). During the 90’s the number of LUs has increased (+22%), while the number of employees has decreased to 14%. This decrease may be justified by the reorganization of the sector that have caused a greater utilization of machinery then in the past and consequently a lower need for employees.

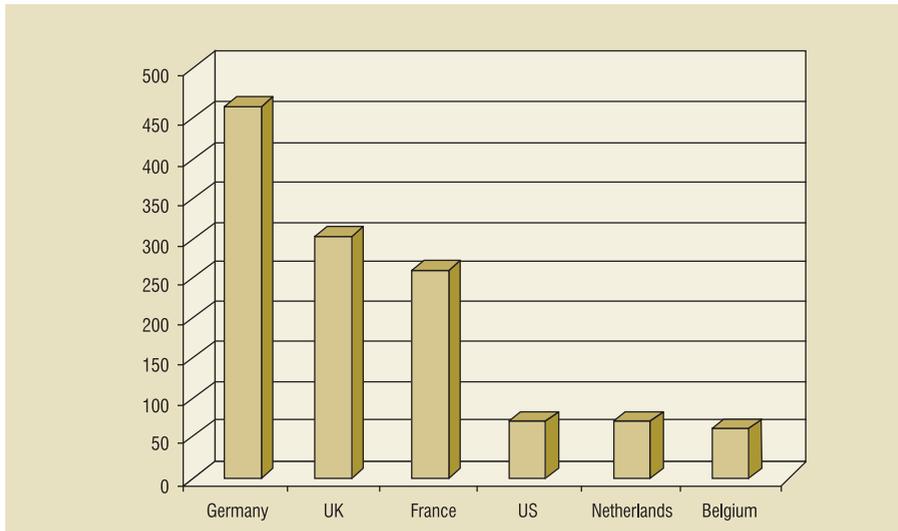


Figure 13.10 Fruits and vegetables exports in 2003 (millions euro)

Source: Istat.

The LUs are diffused in all the regions, even if mainly concentrated in Emilia-Romagna (Ravenna, Ferrara and Bologna provinces) and Campania (Salerno), where food transformation is strongly tied to agricultural production.

In 2003, the balance trade of “fruit and vegetable” was positive (+749 millions euro in 2003). In particular, exports were 1,979 million euro and imports were only 1,229 millions euro.

Sixty-nine per cent of the total imports of processed fruits and vegetables came from EU-15 countries, mainly France. With over 189 millions euro France is the main Italian partner in this sub-sector (figure 13.10).

Italian exports are mainly directed to EU-15 countries (1,383 millions euro), and in particular to Germany (24% of the total export), UK (15%) and France (13%) (figure 13.11).

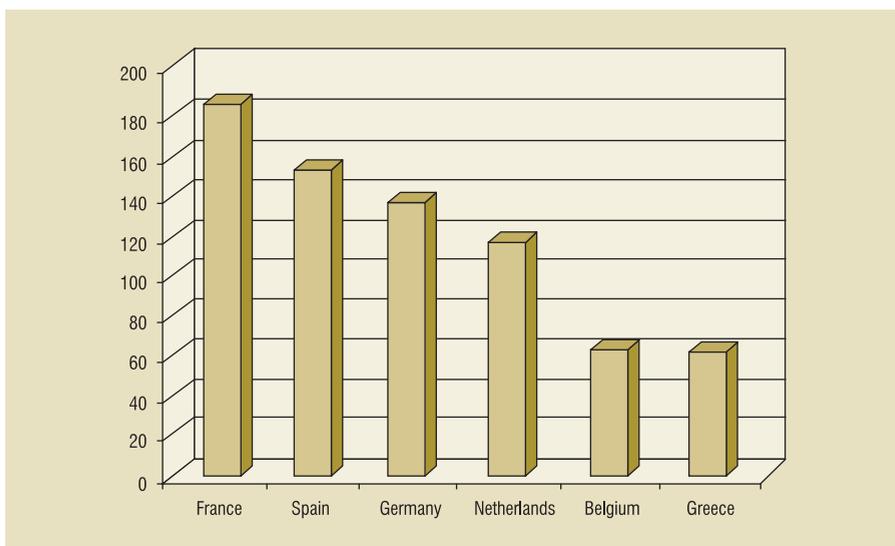


Figure 13.11 Fruits and vegetables exports in 2003 (millions euro)

Source: Istat.

The sub-sector is characterized by the wide diffusion of cooperative society. Most of them are small companies, but there are also large companies as “Conseve Italia” and “Apofruit”. The other big companies are: “La doria”, “AR-Industrie alimentari” and “Zuegg”. The latter is involved also in the production of fruit juice. One of the most important enterprises was “Cirio”, that failed in 2003. This failure affected the whole sub-sector not only because the relevance of the firm, but also because it was owner of shares in other enterprises. The companies of the sub-sector must carry on their reorganization above all because the liberalization of the trade among Mediterranean Countries and

the creation of an area of liberal exchange between EU-25 and North African Countries (Rastoin, 2005).

13.6 CONFECTIONERY

Confectionery is included in the sub-sector “other food industry” and is the second in terms of turnover. This sub-sector comprises 70% of enterprises and the 49% of the employees. In fact, the number of LUs, based on the Industrial and Service Census (2001), is 38,798 and the number of employees is 127,955. These data show that more than a half of the LUs related to the sub-sector “other food-industry” produce confectionery and a third of the employees work in this sub-sector. This category also includes small stores that produce and sell this kind of product.

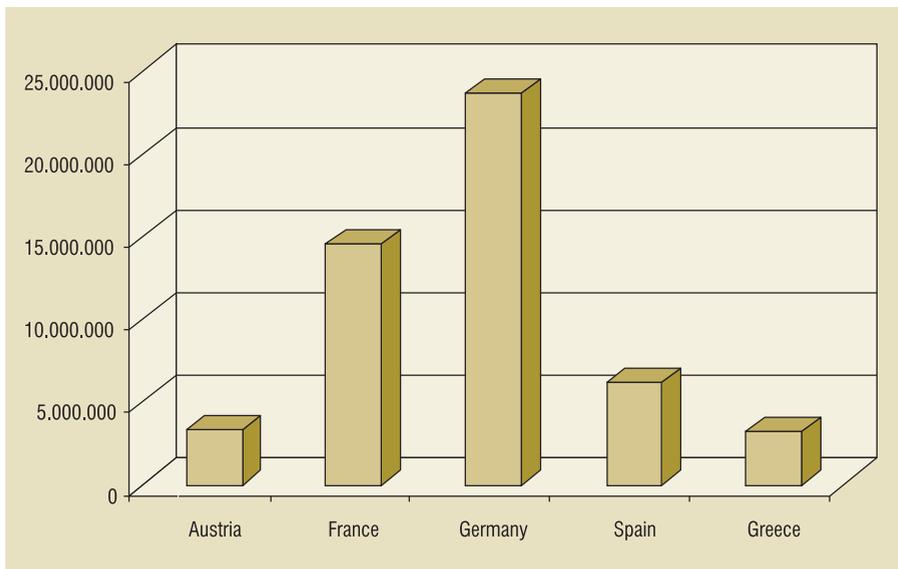


Figure 13.12 Confectionery: imports in 2003 (euro)

Source: Istat.

The most relevant enterprises are “Sagit”, “Forneria Bindi” and “Forneria Lucana”. This kind of production covers the whole Italian area and is not allocated in special places.

As mentioned before, data for “confectionery” are not easy to find, because it is part of a sector that includes the “other food productions”.

Italian imports are 58 million euro, 99% of which came from the EU-15 countries. The main EU-import’s partners are: Germany (41%) and France (25%) (figure 13.12).

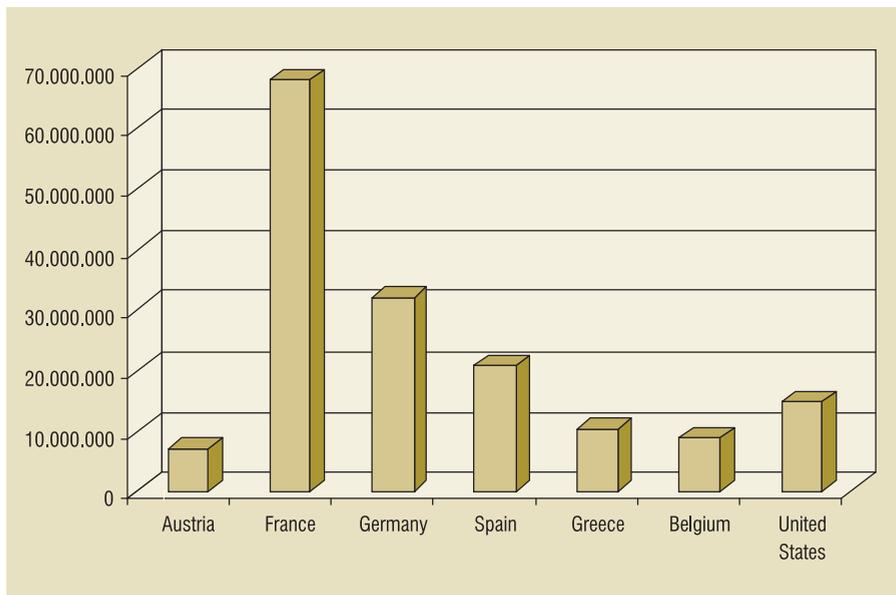


Figure 13.13 Confectionery: exports in 2003 (euro)

Source: Istat.

Italy exports 235 million euro of confectionery, 71% of which to the EU-15 countries. The main EU-export’s partners are: France (40%) and Germany (19%). The exports to the United States are relevant and their value is 15 million euro. (figure 13.13).

13.7 OILS AND FATS

The “Oils and Fats” sub-sector is characterized by the presence of two main kinds of production: olive oil and other oils and fats.

The sub-sector represents 6.5% (5,071) of the LUs and the 3.7% (16,405) of the food industry in Italy, according to the Italian Industrial and Service Census

(2001). Ninety-two per cent of the LUs are involved in the production of olive oil, but they only have 12,374 employees (39%). In terms of employment the structure of the olive oil enterprises is different from the other oils and fats firms. The former are small firms characterized by only 3 employees, while over 55 employees characterize the latter.

Most of the olive oil enterprises are small, but there are also large enterprises involved in this sub-sector, such as “Carapelli” and “Monini”.

The olive oil production enterprises are mainly localized in Puglia, Sicilia, Italian Sardegna, and Calabria. Differently, retail enterprises are diffused in all the Italian regions.

In 2003, the total consumption of oils and fats was only the 4% of the total food expenditure.

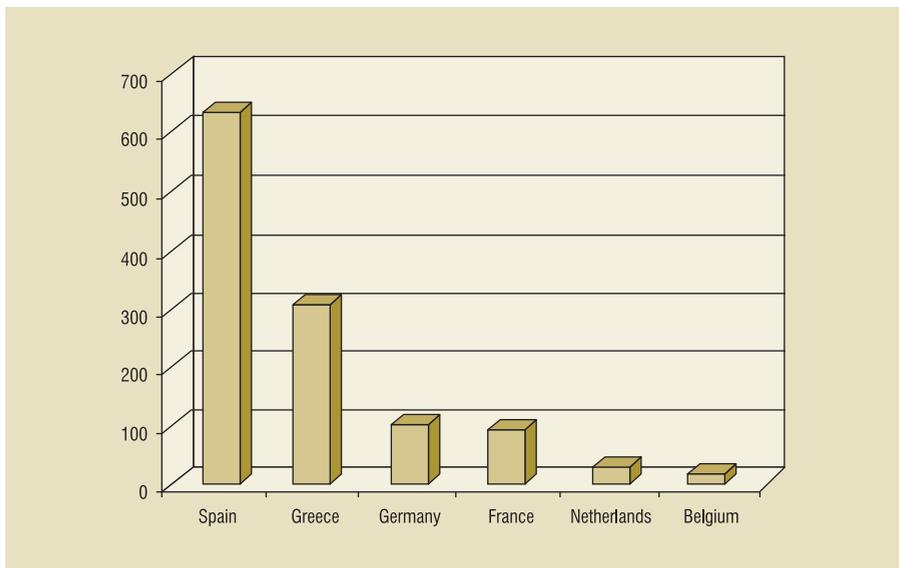


Figure 13.14 Oils and fats: imports in 2003 (million euro)

Source: Istat.

In 2003, Italy imported oils and fats worth over 2,200 millions euro, mainly from Spain (648 million euro, 28% of the total), but also from Greece (317 million euro, 13%) (figure 13.14).

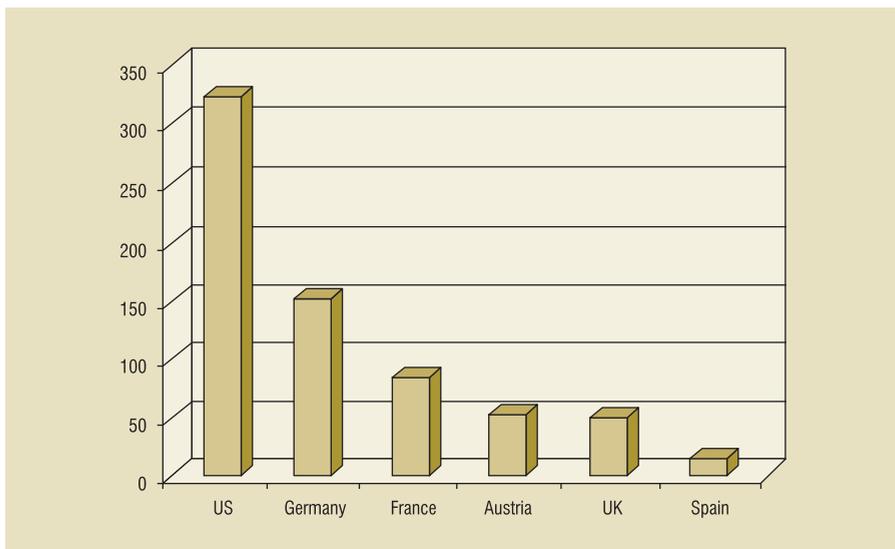


Figure 13.15 Oils and fats: exports in 2003 (million euro)

Source: Istat.

In 2003, the exports of oils and fats was over 1,000 millions euro, 453 millions euro going to EU-15 (42.5%) and to the US for 331 millions euro (30.9%). Among the EU-15 Countries, the largest part of the export is to Germany (14%) (figure 13.15).

In 2003 olive oil import was the 45% (1,081 millions euros) of the total import of oils and fats, 56% from Spain (608 millions euros) and 29% from Greece (308 millions euros). In the same year, Italy exported olive oil for over 832 millions euros (77.8% of the total oils and fats). The main partners in export are United States (36.5%) and Germany (14.7%).

The European Union has recognized 24 POD oils (Protected Origin Denomination) to Italy and one IGP (Protected Geographic Indication). Unfortunately, only a small part of the olive oil production is sold as POD because the regulation is too restrictive. Another problem is the selling price that has to be higher for POD product in order to cover the additional costs³.

3 The former refers to the name of a "denominated" region or place, as to indicate a product that comes from those regions and whose "characteristics depend essentially or exclusively on that geographical environment inclusive of natural and human factors, and whose production, processing, and working take place in that delimited area (EEC Regulations nr. 2081/92, Art. 2, Paragraph 2, Sec. a). IGP productions, on the other hand, refer to the

13.8 CONCLUSIONS

The purpose of this paper was to describe the Italian food-industry, showing the main types of production, the structure and characteristic of the food-industry and the trade relations other countries, especially the EU.

Utilizing the data of the Industrial and Service Census (2001), we have evidenced that the Italian food-industry is characterized by the presence of small enterprises. Nevertheless, a correct evaluation of the structure of the Italian food-industry needs to consider that those data include LUs, the stores that sell and produce confectionery and bakery. Those are less than half of the LUs, and this could mean that the dimension of the food enterprises is not so small as we could think.

There exists an economic difference between the North and the South of Italy, even if we have to consider that the food industry is the only type of industry that is important in the South.

As we have seen, one of the main characteristics of the Italian food-industry is localization and specialization; in fact, there is a strong presence of local districts spread on the Italian areas. Those are “Parmigiano Reggiano”, “Parma Ham” and “Mozzarella” and play a relevant role in the Italian economy. In recent years two great financial crises have happened: the failure of “Parmalat” and “Cirio”, two of the most important enterprises, which have had a strong impact on the Italian economy.

The consequence of these crisis is that the role of the cooperatives is becoming even more important than before. It is also necessary to consider, that cooperatives could represent a good solution for the small enterprises, because it could increase their economic potential.

Another opportunity for the developing importance of the Italian food-industry is the quality, in terms of making good use of the POD. Until now,

name of a particular region or place, “which designates an agricultural or food product coming from that denominated place [...] and whose particular quality, reputation, or any other characteristic can be associated with its geographical origin, and whose production, and/or processing, and/or working take place in that particular geographical area” (EEC Regulations nr. 2081/92, Art. 2, Paragraph 2, Sec. b). A POD or IGP product must comply with production specifications that guarantee its particular characteristics. The specifications provide some guidelines concerning the characteristics and operating procedures that the producer must meet. Among these, a detailed product description, inclusive of chemical, microbiological, and/or organoleptic characteristics, and of the product making method, as well as the elements confirming the connection with the geographical environment prove to have great importance.

the Italian food-industry has not utilized this potential solution, except for the most famous Italian products.

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13.10 APPENDIX**Table A 13.1** Food-industry: imports and exports between Italy and some EU-countries (2003)

France			
Imports (million Euro)		Exports (million Euro)	
Processed meat	787	Other F. products	658
Dairy products	473	Processed meat	274
Other F. products	413	Fruit and vegetables	264
Germany			
Imports (million Euro)		Exports (million Euro)	
Dairy products	1435	Beverages	908
Processed meat	836	Other F. products	697
Other F. products	518	Fruits and vegetables	475
Greece			
Imports (million Euro)		Exports (million Euro)	
Oils and Fats	317	Other F. products	115
Fruits and vegetables	63	Processed meat	93
Other F. products	37	Beverages	59
Spain			
Imports (million Euro)		Exports (million Euro)	
Oils and Fats	648	Other F. products	217
Fish products	479	Fish products	85
Processed meat	223	Processed meat	77

Source: Istat.

Table A 13.2 LU and employees by sub sector (1991-2001)

Sub sector	1991		2001	
	LU	Employees	LU	Employees
15.1 Processed meat	4,385	57,994	4,302	58,264
15.2 Fish products	474	8,863	490	6,708
15.3 Processed fruits and vegetables	1,820	36,730	2,233	31,499
15.4 Oils and fats	5,071	19,702	4,773	16,405
15.5 Dairy products	4,847	49,018	4,817	52,542
15.6 Grain mill products and starch products	2,895	14,634	2,203	12,711
15.7 Animal feeds	725	10,337	787	9,045
15.8 Other food products	43,302	212,486	50,525	220,091
15.9 Beverages	3,995	46,667	3,550	37,384
Total	67,514	456,431	73,849	451,764

Source: Istat.

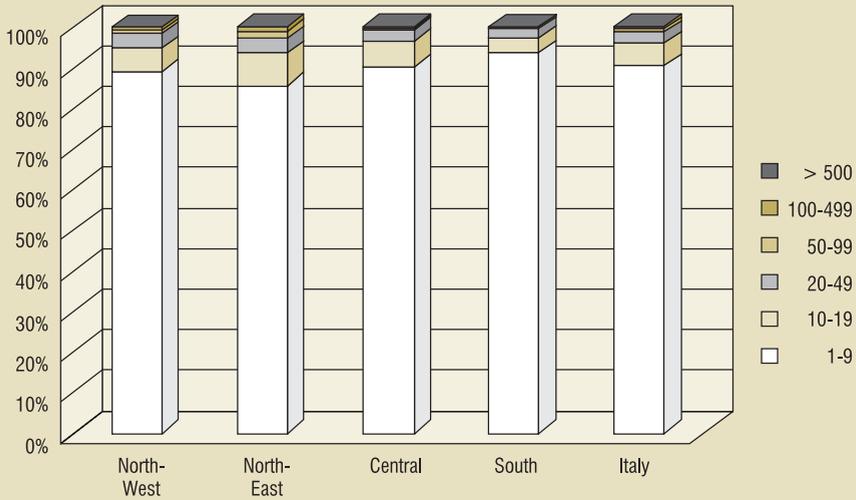


Figure A 13.1 Percentage distribution of the LU (2001)

Source: Istat.

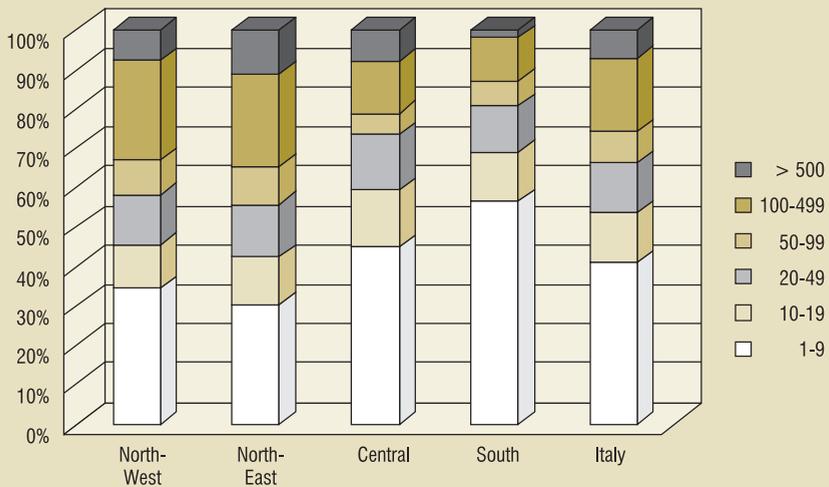


Figure A 13.2 Percentage distribution of employees (2001)

Source: Istat.

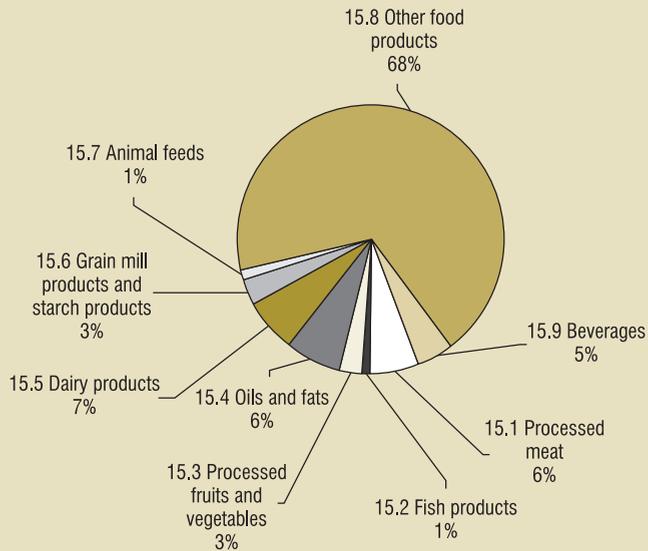


Figure A 13.3 Sub sectors of the Italian food industry: LU (2001)

Source: Istat.

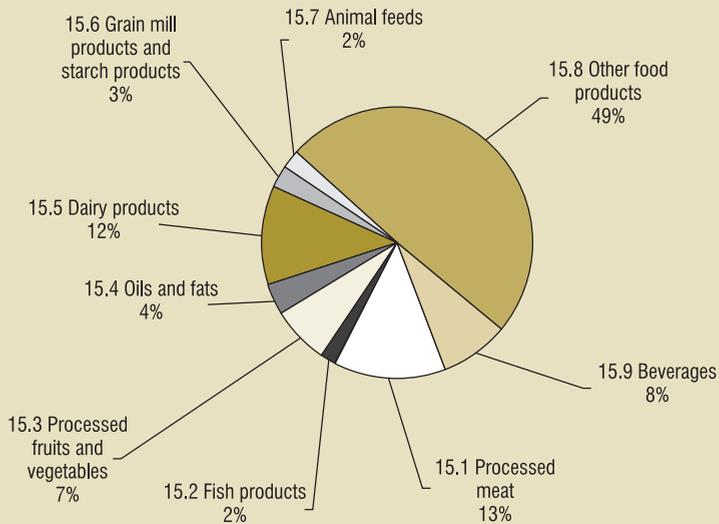


Figure A 13.4 Sub sectors of the Italian food industry: employees (2001)

Source: Istat.