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Novel strategies for italian cherries developement and commercialization

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Moderne strategie di sviluppo e commercializzazione delle ciliegie

Riassunto. La ciliegia può essere ulteriormente valorizzata facendo uscire il prodotto dalla categoria frutta per entrare in quella dei dessert e degli sfizi a beneficio di un pubblico più giovane. All'opposto, localismi, tradizione e stagionalità, che caratterizzano buona parte della produzione nazionale possono essere ulteriormente valorizzati sui middle age e i "diversamente giovani", soprattutto per il mercato interno. Comune alle diverse strategie la necessità di varietà performanti legate a un calendario commerciale strutturato e selezione non distruttiva della qualità con l'utilizzo delle tecnologie per garantire quella che potremmo definire "qualità coerente" con la promessa.

Introduction

To fully comprehend the cherry market's development potential and the strategies essential to its promotion, with particular reference to the national supply chain, we will first analyse the evolution of production in recent years in the international context, to verify what has happened due to the strategies adopted by the players in the field and Italy's role in this arena. We will then go on to verify how structural changes in production have impacted the evolution of trade, with particular attention to the European sphere. Finally, through a nationwide interview-based analysis of a representative sample of the population, we will highlight changes in how cherries are perceived and experienced by the national consumer to understand the most appropriate strategies to adopt to meet their demands, thus ensuring that the sector develops sufficiently.

The international production scenario and the role of Italy

As shown in table 1, at the moment, the primary producer of cherries world-wide is Turkey, with over 600,000 tons of output on average in the last two years

Tab. 1 - World cherry production (in tonnes). Source: our calculations on data of monitor ortofrutta Agroter based on Faostat data. * average 2016-17 on 2013-14.
*Tab. 1 - Produzione mondiale di ciliegie (tonnellate). Fonte: nostre elaborazioni su rilevazioni monitor ortofrutta Agroter su dati Faostat. * media 2016-17 su 2013-14.*

Countries	2013	2014	2015	2016	2017	Variation %*
Turkey	494.325	445.556	535.600	599.650	627.132	31%
USA	301.276	329.852	306.991	315.454	398.140	13%
Iran	279.430	133.987	133.987	196.410	140.081	-19%
Uzbekistan	70.000	80.000	90.000	108.106	136.609	63%
Chile	81.023	84.941	103.477	123.338	126.642	51%
Italy	131.175	110.766	111.119	94.888	118.259	-12%
Spain	97.200	118.220	94.145	100.503	114.433	0%
Greece	48.134	70.042	75.191	88.650	89.600	51%
Ukraine	81.200	67.330	76.640	63.320	70.860	-10%
Syria	62.373	54.211	62.303	69.192	68.518	18%
Romania	80.477	82.808	75.503	73.834	55.490	-21%
Bulgaria	38.162	33.294	49.423	38.496	48.391	22%
Russian Federation	78.000	77.000	41.600	46.089	40.986	-44%
China	32.738	34.278	35.818	37.357	38.897	14%
Others	433.711	432.515	439.083	404.163	369.371	0%
Total	2.309.224	2.189.078	2.266.698	2.396.807	2.482.306	8%

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with production on the rise. Next comes the United States, whose production is also on the rise, while Iran - in third position - is holding ground, compared to Uzbekistan and Chile that have risen in the rankings so much that, in a few short years, they have increased their production by more than 50 %. In the international scenario as a whole, it is therefore possible to see a tendency towards growth, even if it is weak.

Italy, in this context, moves from fourth to sixth place, despite being Europe's largest cherry producer, followed by Spain. At the national level, in fact, production has shown no significant trends over the last

Tab 2 - European cherry production (in tonnes). Source: our calculations based on the data of monitor ortofrutta Agroter based on Faostat data. * average 2016-17 on 2013-14.

*Tab. 2 - Produzione europea di ciliegie (tonnellate). Fonte: nostre elaborazioni su rilevazioni monitor ortofrutta Agroter su dati Faostat. * media 2016-17 su 2013-14.*

Countries	2013	2014	2015	2016	2017	variazione %*
Italy	131.175	110.766	111.119	94.888	118.259	-12%
Spain	97.200	118.220	94.145	100.503	114.433	-0%
Greece	48.134	70.042	75.191	88.650	89.600	51%
Romania	80.477	82.808	75.503	73.834	55.490	-21%
Ucraina	81.200	67.330	76.640	63.320	70.860	-10%
Russian Federazion	78.000	77.000	41.600	46.089	40.986	-44%
Poland	47.552	48.070	48.138	53.773	19.666	-23%
Bulgaria	38.162	33.294	49.423	38.496	48.391	22%
France	35.788	47.291	41.726	34.733	36.845	-14%
Germany	24.462	39.571	31.446	29.373	16.537	-28%
Serbia	22.635	20.008	23.041	20.697	27.323	13%
Albania	18.920	17.730	20.147	19.261	19.169	5%
Portugal	10.776	10.577	17.714	17.362	19.563	73%
Hungary	10.090	9.430	11.312	10.660	10.369	8%
Bosnia and Erzegovina	10.867	9.010	10.825	9.854	8.475	-8%
Others	49.977	50.403	68.132	64.393	55.725	20%
Totale complessivo	791.163	825.540	796.102	751.896	745.943	-7%

Tab. 3 - Italian cherry production (in tonnes). Source: our calculations on data of monitor ortofrutta Agroter based on Istat data. * average 2016-17 and 2013-14.

*Tab. 3 - Produzione italiana di ciliegie (tonnellate). Fonte: nostre elaborazioni su rilevazioni monitor ortofrutta Agroter su dati Istat. * media 2016-17 su 2013-14.*

Regions	2014	2015	2016	2017	2018	Variation %*
Apulia	37.837	40.309	31.304	45.380	42.363	12%
Campania	22.816	24.208	21.350	24.846	27.660	12%
Veneto	14.496	10.345	10.126	12.508	11.657	-3%
Emilia-Romagna	16.082	14.229	11.345	15.372	11.414	-12%
Trentino-South Tyrol	1.510	2.061	970	1.780	3.860	58%
Calabria	2.865	3.393	3.272	3.542	3.591	14%
Sicily	2.866	2.745	2.740	2.922	2.922	4%
Lazio	3.627	4.793	4.583	3.003	2.424	-36%
Piedmont	1.679	2.058	2.087	2.142	2.181	16%
Abruzzo	1.639	1.657	1.596	1.556	1.551	-6%
Sardinia	1.393	1.310	1.300	1.675	1.465	16%
Basilicata	987	928	994	996	1.020	5%
Lombardy	895	817	1.135	922	1.018	13%
Tuscany	1.150	1.160	1.287	913	995	-17%
Marche	326	356	341	317	287	-12%
Liguria	333	121	131	131	136	-41%
Friuli-Venezia Giulia	136	99	184	132	132	12%
Umbria	130	136	144	124	124	-7%
Valle d'Aosta/Vallée d'Aoste	-	-	-	-	-	0%
Molise	-	-	-	-	-	0%
ITALY	110.766	110.723	94.888	118.259	114.798	5%

five years, with the exception of those caused by unusual weather patterns during the various growing seasons. On the European front (tab. 2), the positive changes in Greek production were significant, with increases of over 50% in the period under examination with positive developments in Portugal and Serbia as well. However, the overall trend is fluctuating, with a tendency towards contraction over the last two years.

Apulia, Campania, Veneto: These regions are currently first, second, and third place in cherry production (tab. 3). 85% of production is essentially concentrated in five regions ranging from north to south, guaranteeing a very long marketing season. With over 40 thousand tonnes, the province of Bari is the first Italian province in the production of cherries, supplying over 30% of the national production.

The case of Trentino-South Tyrol is of note as its production has increased by 58% from 2014-2015 to 2017-18, thanks to the development of late varieties suitable for higher altitudes. Countries and areas with increasing production have all introduced new high-performance varieties with complementary maturation schedules, accompanied by the use of non-destructive produce sorting technologies, able to separate the different qualities with precision so as to constantly provide the market with consistent quality products, capable winning over final customers near and far.

The trade scene in a global context

In the international context, the Asian market is the main driver of the increase in cherry consumption. This market will continue to grow due to increases in income and population growth, as well as awareness programs promoting a healthy, balanced diet. The main importers of cherries worldwide, in addition to China and Hong Kong, are Russia, Germany and Austria.

In the European scenario as well, imports show a clear positive trend, both for internal trade and for trade outside Europe, in contrast to the stagnation of domestic production.

The main exporters world-wide are Chile, Hong Kong, Turkey and United States. In fact, these four countries handle over half of all cherries traded yearly.

Chile's output has grown significantly, and it is top for exports thanks also to China, an attractive market opportunity which tends to absorb much of Chile's production potential. Christmas, New Year and Chinese New Year have a big impact on the sale of Chilean cherries. Cherries are, in fact, one of the most popular fruits to give as a present in China during these holidays, so during these festivities demand increases considerably.

Looking at EU imports, we can see a general increase, as mentioned above (tab. 4). In particular,

Tab. 4 - European cherry import (in tonnes). Source: Our calculations on data of monitor ortofrutta Agroter based on Eurostat data.
Tab. 4 - Importazione europea di ciliegie (tonnellate). Fonte:nostre elaborazioni su rilevazioni monitor ortofrutta Agroter su dati Eurostat.

Import	Extra UE					Intra Ue					Total				
	2014	2015	2016	2017	Variation 2017-16/2015-14	2014	2015	2016	2017	Variation 2017-16/2015-14	2014	2015	2016	2017	Variation 2017-16/2015-14
Germany	4.836	5.361	7.806	8.000	55.00%	29.343	31.623	37.620	43.469	33.00%	34.178	36.984	45.426	51.469	36.20%
Austria	13.707	16.112	26.617	17.162	46.80%	1.754	2.236	2.627	2.627	31.70%	15.462	18.348	29.243	19.789	45.00%
UK	5.375	4.875	3.571	3.614	-29.90%	13.157	13.208	12.447	11.843	-7.90%	18.532	18.084	16.018	15.457	-14.00%
Netherlands	2.669	1.146	1.008	1.469	-35.10%	4.878	7.629	6.885	10.383	38.10%	7.547	8.775	7.893	11.852	21.00%
France	540	783	230	227	-65.40%	6.681	7.035	5.810	6.170	-12.70%	7.221	7.818	6.040	6.397	-17.30%
Belgium	972	116	47	474	-52.20%	5.763	4.713	5.978	5.795	12.40%	6.735	4.829	6.024	6.269	6.30%
Italy	1.852	1.619	3.596	1.449	45.40%	7.735	5.910	7.292	4.749	-11.80%	9.586	7.529	10.888	6.198	-0.20%
Poland	-	37	103	1.075	3058.40%	1.875	1.060	615	3.057	25.10%	1.875	1.097	718	4.132	63.20%
Sweden	267	712	1.383	1.482	192.70%	2.480	2.699	2.875	1.821	-9.30%	2.747	3.411	4.258	3.303	22.80%
Portugal	7	4	124	6	1024.10%	4.464	1.487	5.351	3.014	40.60%	4.471	1.491	5.475	3.020	42.50%
Hungary	2.140	1.323	968	2.708	6.10%	21	84	140	38	71.10%	2.161	1.407	1.108	2.746	8.00%
Lithuania	-	37	4	4	-80.20%	2.941	13.814	3.701	2.124	-65.20%	2.941	13.852	3.705	2.128	-65.30%
Denmark	1.027	1.080	1.170	885	-2.50%	989	1.016	880	1.088	-1.80%	2.016	2.096	2.050	1.973	-2.20%
Bulgaria	-	8	386	313	8862.80%	1.809	1.532	1.033	1.576	-21.90%	1.809	1.540	1.419	1.890	-1.20%
Spain	959	728	720	1.375	24.10%	282	762	217	201	-60.00%	1.241	1.490	936	1.576	-8.00%
Other	182	157	274	253	55.20%	6.450	4.841	4.824	6.574	0.90%	6.633	4.998	5.098	6.827	2.50%
Total	34.533	34.099	48.007	40.496	29.00%	90.620	99.649	98.292	104.529	6.60%	125.153	133.748	146.298	145.025	12.50%

the share of product imported from countries outside the Union has increased in the two-year period 2017-16 compared to the previous one. The trend is up 29%, compared to "only" 7% of imports among EU countries. Similarly, in Italy something comparable has taken place: the import of cherries from non-EU countries has increased in the period under examination by 45% while, at the same time, the import from EU countries has decreased by 12%.

Looking further into our country's imports, we can see that the first supplier of cherries to Italy is Spain, with a share of 49% (fig. 1). Turkey with a 21% share and Greece with 13% follow.

Considering export, despite a certain year-to-year variability, Spain is confirmed leader in terms of exported volumes, followed by Greece. Both countries stand out for the medium-low market prices which trend to even lower values within the period 2014-2018. On the other hand, despite a fluctuating trend, Italy showed a certain increase during this period, and showed the best prices among the European producing countries. However, export still represents a minor commercialization channel compared to internal market, pursued mainly in highly productive years and without a clear long-term strategy.

Finally, a look at destinations of the national cherry exports. The German-speaking countries absorb 77% of our exports, in particular, Germany alone holds a 57% share while Switzerland and Austria are trailing with a share of 11% and 9% respectively. The other countries we ship our cherries to are Belgium, Spain, the United Kingdom, the Netherlands, and Poland.

Changes in how Italian consumers perceive and experience the cherry

The cherry is a favourite with Italians according to the research carried out by Agroter Fruit and Vegetable Monitor in partnership with Toluna at the beginning of 2019 using the CAWI (Computer Aided Web Interview) technique on a sample of 500 national purchasing managers, stratified by gender, age, and

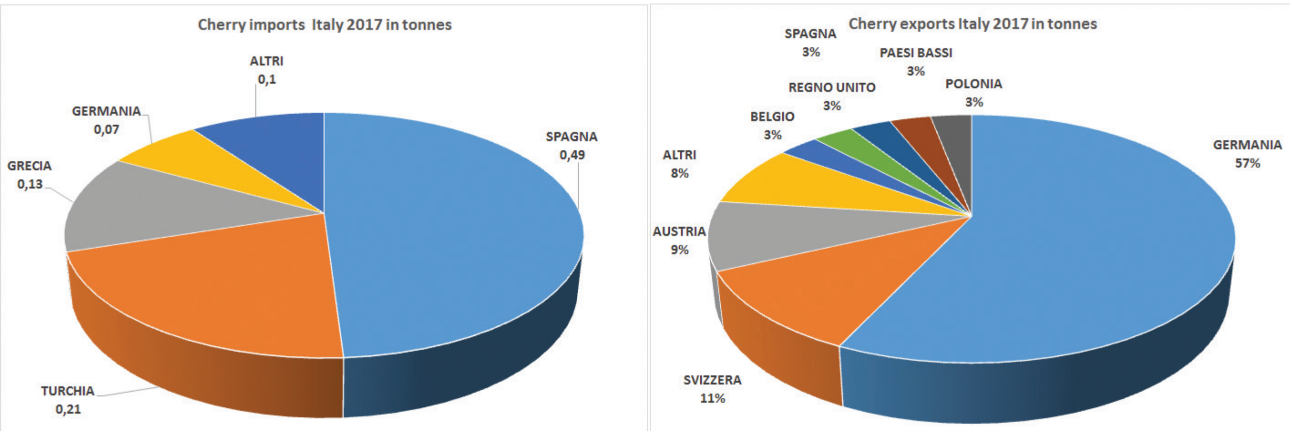

Fig. 1 - Italian cherry import-export for the year 2017. Source: our calculations on data of monitor ortofrutta Agroter on Eurostat data.
Fig 1 - Import-export di ciliegie in Italia nell'anno 2017 (tonnellate). Fonte: nostra elaborazione su rilevazioni Monitor Ortofrutta Agroter su dati Eurostat.

Tab. 5 - Survey results: "What is the most satisfying fruit flavour wise?". Source: our calculations based on the data of Monitor Ortofrutta Agroter-Toluna CAWI 1.000 - 2019.
Tab. 5 - Sondaggio: "Qual'è il frutto che più la appaga a livello gustativo?" Fonte: nostre elaborazioni su dati Monitor Orotfrutta Agroter-Toluna CAWI 1.000 - 2019.

Fruits	Totale	18 - 34	35 - 54	55 +	Male	Female	Nord ovest	Nord est	Center	South
Cherry	25.70%	21.30%	25.30%	28.10%	21.10%	27.20%	17.40%	21.40%	34.30%	30.30%
Peach	17.00%	19.20%	19.10%	14.10%	21.10%	15.70%	21.00%	17.40%	12.10%	16.50%
Strawberry	16.60%	22.30%	16.50%	14.10%	11.40%	18.40%	18.80%	14.30%	16.20%	16.50%
Melon	9.50%	7.50%	9.80%	10.10%	8.10%	9.90%	7.30%	18.40%	6.10%	7.90%
Apricot	9.50%	8.50%	7.20%	12.10%	9.80%	9.30%	10.10%	11.20%	14.10%	4.60%
Table grapes	7.00%	3.20%	6.20%	9.60%	9.80%	6.00%	6.50%	10.20%	4.00%	7.20%
Orange	6.00%	4.30%	6.70%	6.00%	8.10%	5.20%	2.90%	5.10%	3.00%	11.20%
Raspberry	4.30%	5.30%	5.20%	3.00%	3.30%	4.70%	6.50%	2.00%	7.10%	2.00%
Blueberry	2.90%	5.30%	2.10%	2.50%	3.30%	2.80%	8.00%	0.00%	2.00%	0.70%
Pear	1.60%	3.20%	2.10%	0.50%	4.10%	0.80%	1.50%	0.00%	1.00%	3.30%
None of these	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%

geographical area so as to be representative of the Italian population. Its approval rating stands at 25.7%, with even better results among the over 55 age group. As shown in table 5, peaches and strawberries follow the cherry, with shares between 16 and 17%, while other fruits do not reach 10%. Women have a higher perception of the cherry's value.

Central and southern Italy are the areas where the cherry is appreciated most, followed at a distance by the north-east. In the north-west, the best loved fruit is the peach, with the strawberry a close second.

It is very interesting to point out that only 0.6% of Italians declare that they do not eat cherries, so it is a widespread and widely consumed fruit in every part of our country. This is probably because it has no particular contraindications either in terms of food intolerances or health-wise.

As shown in table 6, Italians prefer to consume cherries at home, confirming that they think of it as traditional product and that it is strongly rooted in our gastronomic culture. However, the cherry is also enjoyed during fun occasions (on the beach, in the mountains, at the lake) and it is mainly young people and women who favour it. It is also often eaten at work, as it is small and easy to transport; with a small container you can bring the right amount for a snack or dessert.

On the other hand, consumption as a street food and at restaurants is still modest and therefore not relevant, probably because Italians believe it is not very graceful or practical to eat cherries in public. Regarding special occasions (Christmas and Easter mainly) they are and remain a niche consumption. Few Italians choose this fruit for important occasions.

The time of day when the cherry is most frequently eaten is the afternoon for a snack, especially by young people, compared to the morning when the percentage is very low, as shown in table 7. It is worth noting the consumption of the cherry as a dessert, both after lunch and dinner. As an ending to the two main meals, the primary consumers are the over 35 age group and the over 55 age group. The after-dinner treat is, instead, a habit already somewhat established in the 35 -54 age group.

The afternoon is the time of the day when the cherry is eaten most both for ease and practicality,

Tab. 6 - Survey results: "Where do you eat cherries?". Source: our calculations on the data of Monitor Orotfrutta Agroter-Toluna CAWI 1.000 - 2019.

Tab. 6 - Sondaggio: "In quali occasioni/momenti consuma ciliegie?". Fonte: nostre elaborazioni su dati Monitor Orotfrutta Agroter-Toluna CAWI 1.000 - 2019.

Where or when	Totale	18 - 34	35 - 54	55 +	Male	Female	Nord ovest	Nord est	Center	South
At home	91.40%	89.40%	89.70%	94.00%	85.40%	93.40%	92.80%	92.90%	89.90%	90.10%
On holiday	28.50%	33.00%	28.90%	26.10%	23.60%	30.20%	26.80%	32.70%	25.30%	29.60%
At work	16.00%	12.80%	22.20%	11.60%	17.90%	15.40%	13.00%	24.50%	14.10%	14.50%
As an aperitif	13.40%	10.60%	18.60%	9.60%	20.30%	11.00%	10.10%	10.20%	12.10%	19.10%
At the restaurant	12.30%	10.60%	12.40%	13.10%	18.70%	10.20%	8.00%	10.20%	14.10%	16.50%
On the street	12.10%	17.00%	12.40%	9.60%	16.30%	10.70%	10.10%	16.30%	12.10%	11.20%
For important dinners	10.90%	9.60%	13.90%	8.50%	15.50%	9.30%	6.50%	9.20%	8.10%	17.80%
At Easter	4.50%	4.30%	7.70%	1.50%	5.70%	4.10%	3.60%	6.10%	3.00%	5.30%
During festivities	3.10%	4.30%	5.20%	0.50%	6.50%	1.90%	4.40%	4.10%	2.00%	2.00%

Tab. 7 - Survey results: "What time of the day do you usually eat fresh cherries?". Source: our calculations on the data of Monitor Orotfrutta Agroter-Toluna CAWI 1.000 - 2019.

Tab. 7 - Risultati del sondaggio: "In che momento della giornata mangia di solito le ciliegie fresche?". Fonte: nostre elaborazioni su dati Monitor Orotfrutta Agroter-Toluna CAWI 1.000 - 2019.

Time of the day	Totale	18 - 34	35 - 54	55 +	Male	Female	Nord ovest	Nord est	Center	South
I do not eat cherries	0.60%	1.10%	0.00%	1.00%	0.00%	0.80%	1.50%	0.00%	1.00%	0.00%
At breakfast	8.00%	14.90%	8.80%	4.00%	11.40%	6.90%	8.00%	12.20%	4.00%	7.90%
In the morning as a snack	33.30%	36.20%	36.60%	28.60%	26.80%	35.40%	26.80%	39.80%	31.30%	36.20%
Right after lunch as a dessert	68.40%	47.90%	71.10%	75.40%	65.90%	69.20%	67.40%	63.30%	73.70%	69.10%
In the afternoon as a snack	66.70%	74.50%	67.50%	62.30%	59.40%	69.20%	60.90%	75.50%	61.60%	69.70%
Right after dinner as a dessert	52.20%	38.30%	56.20%	54.80%	53.70%	51.70%	52.20%	54.10%	55.60%	48.70%
After dinner as a special treat	31.00%	28.70%	34.50%	28.60%	35.80%	29.40%	29.00%	33.70%	30.30%	31.60%

just a rinse and they are ready! The cherry's sweetness allows it to be considered a sweet and healthy alternative to the classic dessert, on which to develop alternative consumption opportunities.

As for seasonality, Italians believe that May and June are the months for cherry eating. However, it clearly emerges that the younger age groups extend consumption to July and August (tab. 8) as well. Therefore, late varieties grown in the Alpine valleys have been included in their buying habits, so much so that - in their eyes - there has been a further seasonal adjustment, which leads to consumption up until September, unlike the over 55 who stop in July. In fact, the more mature generations consume cherries especially in the month of June following the consolidated seasonality.

Italians attach great importance to the origin of the product which, after freshness, is the most important attribute in the purchasing decision (tab. 9). As can be seen in Table 11, Italians believe that the national region where the best cherries are produced is Emilia-Romagna. The Vignola PGI cherry, in fact, is historically imprinted in the collective imagination, especially for the elderly (49.3%), as a higher quality cherry, which means that, especially in the north-east and north-west, Emilia is perceived as the most important producer. In the north-west, Piedmont is identified as a reference production area for 15% of people, while at the national level it is 8%.

It is interesting to note that Lazio is recognized as the producer of reference by 23.2% of the population in central Italy, and 8.8% nationally. In the south, besides Apulia, which is the largest Italian producer, Sicily is also recognized, with a 22.4% share, while at a national level it stops at 8%. It is therefore important to highlight that in each of the three fundamental

Tab. 8 - Survey resuts: "In which months of the year do you eat fresh cherries?". Source: our calculations on the data of Monitor Orotfrutta Agroter-Toluna CAWI 1.000 - 2019.

Tab. 8 - Risultati del sondaggio: "In quali mesi dell'anno mangia ciliegie fresche?". Fonte: nostre elaborazioni su dati Monitor Orotfrutta Agroter-Toluna CAWI 1.000 - 2019.

Month	Totale	18 - 34	35 - 54	55 +	Male	Female	Nord ovest	Nord est	Center	South
None	0.80%	2.10%	0.00%	1.00%	0.80%	0.80%	0.70%	0.00%	1.00%	1.30%
January	1.00%	3.20%	1.00%	0.00%	2.40%	0.60%	0.70%	0.00%	0.00%	2.60%
February	0.60%	0.00%	1.00%	0.50%	2.40%	0.00%	0.70%	0.00%	0.00%	1.30%
March	1.60%	0.00%	3.60%	0.50%	4.10%	0.80%	1.50%	1.00%	0.00%	3.30%
April	10.50%	16.00%	11.90%	6.50%	16.30%	8.50%	9.40%	13.30%	8.10%	11.20%
May	58.90%	43.60%	59.80%	65.30%	62.60%	57.70%	58.00%	60.20%	58.60%	59.20%
June	73.50%	63.80%	77.30%	74.40%	65.00%	76.40%	73.20%	73.50%	71.70%	75.00%
July	34.90%	46.80%	39.70%	24.60%	30.10%	36.50%	33.30%	31.60%	36.40%	37.50%
August	14.00%	24.50%	16.00%	7.00%	13.00%	14.30%	15.20%	9.20%	17.20%	13.80%
September	4.70%	9.60%	5.20%	2.00%	8.90%	3.30%	7.30%	1.00%	6.10%	4.00%
October	1.60%	1.10%	2.10%	1.50%	2.40%	1.40%	2.90%	1.00%	1.00%	1.30%
November	0.60%	1.10%	1.00%	0.00%	1.60%	0.30%	1.50%	0.00%	0.00%	0.70%
December	0.80%	1.10%	1.00%	0.50%	2.40%	0.30%	0.70%	1.00%	0.00%	1.30%

Tab. 9 - Survey results: "When buying cherries, how important are the following aspects for you?". Source: our calculations on the data of Monitor Ortofrutta Agroter Toluna CAWI 1.000 - 2018.

Tab. 9 - Risultati del sondaggio: "Quando compra ciliegie quanto sono importanti per lei i seguenti aspetti?" Fonte: nostre elaborazioni su dati Monitor Orotfrutta Agroter-Toluna CAWI 1.000 - 2018.

Answer	1. Not important	2	3	4	5. Very important	I don't know
Appearance (freshness, colour, etc.)	1%	4%	10%	21%	64%	1%
Country of origin (Italy, Turkey, Greece...)	4%	6%	14%	25%	51%	1%
That they are local	5%	7%	15%	26%	47%	1%
The price	5%	6%	25%	30%	34%	1%
That they have a spcific denomination	8%	14%	25%	26%	24%	3%
The size of the fruits	4%	15%	27%	32%	21%	1%
That they are organic	13%	16%	24%	24%	20%	3%
The variety	5%	13%	26%	35%	19%	2%
The brand	20%	20%	27%	18%	11%	5%

Tab. 10 - Survey results: “Which region produce the best cherries?”. Source: our calculations on the data by Monitor Orotfrutta Agroter-Toluna CAWI 1.000 - 2019.
Tab. 10 - Quali sono le Regioni italiane in cui si producono le ciliegie migliori?nostre elaborazioni su dati Monitor Orotfrutta Agroter-Toluna CAWI 1.000 - 2019.

Region	Totale	18 - 34	35 - 54	55 +	Male	Female	Nord ovest	Nord est	Center	South
Emilia-Romagna	36.3%	16.%	33.%	49.3%	26.8%	39.6%	49.3%	52.%	31.3%	17.8%
Apulia	24.2%	12.8%	27.8%	26.1%	23.6%	24.5%	15.9%	22.5%	21.2%	34.9%
I don't know	19.7%	37.2%	17.5%	13.6%	18.7%	20.1%	19.6%	15.3%	27.3%	17.8%
Campania	15.4%	10.6%	15.5%	17.6%	19.5%	14.%	10.1%	6.1%	16.2%	25.7%
Veneto	11.3%	8.5%	7.2%	16.6%	10.6%	11.5%	10.1%	32.7%	5.%	2.6%
Sicily	10.5%	8.5%	13.4%	8.5%	16.3%	8.5%	5.1%	4.1%	6.1%	22.4%
Lazio	8.8%	4.3%	12.4%	7.5%	8.9%	8.8%	5.8%	6.1%	23.2%	4.%
Calabria	8.6%	13.8%	7.7%	7.%	9.8%	8.2%	6.5%	2.%	8.1%	15.1%
Tuscany	7.8%	3.2%	8.8%	9.1%	6.5%	8.2%	6.5%	3.1%	18.2%	5.3%
Piedmont	7.2%	1.1%	9.3%	8.%	9.8%	6.3%	15.9%	3.1%	3.%	4.6%
Trentino-South Tyrol	6.2%	4.3%	6.2%	7.%	9.8%	5.%	8.7%	12.2%	1.%	3.3%
Lombardy	5.8%	3.2%	7.7%	5.%	6.5%	5.5%	12.3%	5.1%	2.%	2.6%
Friuli-Venezia Giulia	4.9%	3.2%	6.2%	4.5%	6.5%	4.4%	4.4%	9.2%	5.%	2.6%
Basilicata	4.5%	7.5%	4.6%	3.%	6.5%	3.9%	5.8%	3.1%	1.%	6.6%
Abruzzo	4.1%	4.3%	3.1%	5.%	6.5%	3.3%	4.4%	2.%	3.%	5.9%
Marche	3.7%	5.3%	3.6%	3.%	4.1%	3.6%	3.6%	2.%	3.%	5.3%
Liguria	3.3%	0.%	4.1%	4.%	4.1%	3.%	7.3%	1.%	1.%	2.6%
Sardinia	3.1%	2.1%	4.6%	2.%	4.1%	2.8%	2.9%	2.%	0.%	5.9%
Umbria	3.1%	1.1%	5.2%	2.%	5.7%	2.2%	2.9%	1.%	5.%	3.3%
Molise	2.5%	4.3%	3.1%	1.%	4.9%	1.7%	2.2%	2.%	2.%	3.3%
Vallée d'Aoste	1.9%	2.1%	1.%	2.5%	5.7%	0.6%	2.2%	3.1%	0.%	2.%

areas in which Italy is divided, there is a region of reference for cherry production, Emilia-Romagna in the north, Lazio in the centre, and Apulia in the south, responding to that concept of localism so dear to a growing share of consumers and confirmed by the findings in table 10. However, it should be emphasized that 37.2% of young people do not know where cherries are produced nationally, suggesting an important marketing opportunity for the enhancement of the product by linking it to the natural beauty or historical importance of the different growing areas.

When asked what other countries in the world, apart from Italy, produce high quality cherries, the most frequent response was “I don’t know” (tab. 11). After “I don’t know”, the first foreign cherry-producing countries known are Spain and France. The fact that Turkey, the world’s leading producer, and Chile, the leading exporter, are not known denotes that the cherry is not perceived in the collective imagination as a global product. This is perfectly consistent with what emerged from the previous responses.

New strategies to enhance and develop the cherry’s position in the domestic and international markets

The cherry is, therefore, a fruit much loved by the Italian consumer for its taste; so much so that it ranks at the top for satisfaction. This factor can be further enhanced to move the product out of the fruit group and into that of desserts and special treats - in which it is not yet consolidated-reducing market shares of industrial products rich in carbohydrates and saturated fats typical of this consumer segment, focusing on the best nutritional profile and on a comparable palatal satisfaction, unique or nearly so, in the field of fruit. The up-side is a higher margin for a much more interesting portion size. The reduction of the weights for sale and packaging into individual portions would guarantee- among other things - incremental sales that do not cannibalize the traditional, consolidated consumption at home. It would be dedicated to a younger audience that is, among other things gradually moving away from fruits and vegetables precisely because of their lack of practicality and unsatisfactory taste.

Significant experiences abroad suggest how this new consumption opportunity, related to a different functional use, generates benefits also on the seasonal mass consumption and does not weaken its potential attractivity. To do this, however, it is necessary that,

Tab. 11 - Survey results: "Besides Italy, which countries in the world produce the best cherries?". Source: our calculations based on the data from Monitor Orotfrutta Agroter-Toluna CAWI 1.000 - 2019.
Tab. 11 - Risultati del sondaggio "Oltre all'Italia quali sono i Paesi del mondo in cui si producono le migliori ciliegie?". Fonte nostre elaborazioni su dati Monitor Orotfrutta Agroter-Toluna CAWI 1.000 - 2019.

Country	Totale	18 - 34	35 - 54	55 +	Male	Female	Nord ovest	Nord est	Center	South
I don't know	44.8%	57.5%	41.8%	41.7%	39.8%	46.4%	42.8%	40.8%	53.5%	43.4%
Spain	36.3%	25.5%	36.6%	41.2%	38.2%	35.7%	42.%	37.8%	28.3%	35.5%
France	12.5%	9.6%	15.5%	11.1%	17.9%	10.7%	16.7%	13.3%	6.1%	12.5%
Greece	10.7%	5.3%	11.3%	12.6%	13.8%	9.6%	10.9%	10.2%	5.%	14.5%
Turkey	8.2%	4.3%	7.2%	11.1%	11.4%	7.1%	6.5%	13.3%	10.1%	5.3%
Chile	6.4%	4.3%	7.2%	6.5%	7.3%	6.%	8.%	11.2%	5.%	2.6%
None of these	5.1%	2.1%	6.7%	5.%	4.9%	5.2%	2.9%	9.2%	6.1%	4.%
Marocco	5.1%	5.3%	5.7%	4.5%	7.3%	4.4%	4.4%	5.1%	4.%	6.6%
United States	4.9%	3.2%	5.2%	5.5%	5.7%	4.7%	4.4%	6.1%	8.1%	2.6%
China	4.1%	4.3%	4.1%	4.%	7.3%	3.%	2.2%	4.1%	2.%	7.2%
Iran	2.9%	2.1%	2.6%	3.5%	4.9%	2.2%	2.2%	3.1%	4.%	2.6%
India	1.2%	1.1%	1.6%	1.%	0.8%	1.4%	0.7%	1.%	1.%	2.%

as snacks and sweets in general, the product have a perfect appearance and a consistent sensory profile, as confirmed by research on perception. This is only possible with high-profile genetic material and quality selection guaranteed by use of non-destructive sorting technologies. In this context, an extension of the product's seasonal availability would be relevant, due to the different purchasing profile in this segment, which can be guaranteed with imports with varied seasonality or with counter-season imports from other growing areas.

On the contrary, localisms, tradition, and seasonality can be further enhanced for the middle aged and the "differently young" age groups by leveraging the thousands of territorial and seasonal facets of national production in an extended concept of local product, or "the product closest to you in that time of the season ", precisely through the enhancement of the emotional contents related to the different production areas of our country, both on the level of historical importance and natural beauty. These factors are known nationally but would be more difficult to convey on an international scale.

With regard to the international scenario however, there is excellent potential for adding value in this area as well, by focusing on our country's aptness for "sun-kissed Mediterranean products" within the realm of the "Made in Italy" label. As long as it is possible adopt the strategies of the players who have grown the most in the world market and who count on productive varieties, linked to a structured sales season and non-destructive sorting using the latest technologies to guarantee what the English-speaking world calls "consistent quality" and what we could rename "quality that lives up to our promises."

Abstract

For the benefit of a younger audience, the cherry can be further enhanced by freeing it from the fruit group and allowing it to become part of the world of desserts and special treats. On the contrary, the localisms, traditions, and seasonality which characterize much of the national production can be further emphasized for the middle age and the "differently young" age groups, especially for the domestic market. Common to these diverse strategies is the need for high performance varieties linked to a structured sales season and non-destructive sorting with the use of the latest technologies to guarantee what the English-speaking world calls "consistent quality" and what we could rename "quality that lives up to our promises."

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