ITALIAN AGRICULTURE IN FIGURES 2025

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Consiglio per la ricerca in agricoltura e l'analisi dell'economia agraria

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ITALIAN AGRICULTURE IN FIGURES 2025

ROME, 2025

INTRODUCTION

Now in its 38th edition, the volume "Italian Agriculture Counts", edited by CREA's Research Centre for Agricultural Policies and Bioeconomy, pictures the evolution of the agricultural sector and the relationships woven by the primary sector with the rest of the economy, society, and the environment.

In 2024, Italy's primary sector recorded an overall positive performance, with the production value of the Agriculture, Forestry and Fisheries sector rising by 2.4% to exceed 77 billion euros, as the effect of a marginal growth in production volumes (+0.6%), accompanied by a more substantial increase in prices (+1.8%), albeit lower than that of the previous year.

A strengthening of production volumes led to an increase in employment for the entire industry, as evidenced by the slight increase in AWU (+0.7%), a pattern supported in particular by a significant expansion in personnel numbers (+3.1%), whose gross salaries increased by 0.8%.

The structure and trend of the entire sector were dominated by the agricultural component, which alone accounted for 93.6% of the total and was the main driver of the good economic performance, supported by a significant downsizing of intermediate consumption prices (-7.1%) and overall positive production trends for plant production (+0.8 on average in volumes), which represented more than half of the value produced in Italy.

It was also a favourable year for the Livestock sector with volume increases of the same magnitude, accounting for 33% of the total value, and for Diversification sub-activities which continued to show progressive consolidation.

These positive performances strengthened the impact of the primary sector on the national economic system with a share of 2.3% of GDP in current values, as well as the impact of the value produced by the agri-food system as a whole with respect to the entire economy, with a turnover of around 700 billion euros, up 1.7% compared to the previous year.

As regards food consumption, the average household expenditure remained stable compared to 2023, while a change in many Italians' eating habits continued, with a reduction in the variety and/or quantity of products purchased, especially those of animal origin, occasionally to the detriment of quality.

On the international market side, the positive trend of the Italian agri-food budget continued: agri-food exports

improved by 8.7% to reach a record value of 68.5 billion euros, strongly supported by Made in Italy products which exceeded 50 billion euros, against imports still significant but slowing down compared to recent years, also due to the increase in raw material prices across the globe.
The presence of holiday farms continued to grow, especially in the Northern and Central regions, consolidating a high density nationwide, with 9 facilities per 100 km2, accompanied by a significant increase in guests, both foreign and Italian, with particular attention to Food and Wine Tourism, confirming the important valorization of local productions and geographical appellations.
In short, the volume revealed an overall positive picture for the Italian agri-food sector, which in 2024 demonstrated admirable resilience, confirming itself as a strategic sector for the national economy as a whole. That said, alongside these encouraging results, some critical issues persisted which were the result of an interaction between climatic, economic and structural factors. Climate change continued to have a significant impact on agricultural productivity, increasing yield uncertainty, and imposing an acceleration in processes to adapt production systems. Added to this were the particular market dynamics, marked by strong price volatility and high production costs, which significantly compress companies' profit margins. At the same time, the growing pressure on rural systems and primary production, fuelled by a depopulation of inland areas and a lack of generational renewal, continued to undermine the foundations of the sector. In this scenario, increasingly intense international competition and the evolution of trade policies posed further challenges for competitiveness, the safeguarding of local productions, and access to foreign markets.
Despite the presence of these significant constraints, in the section summarizing the Italy/EU comparison, Italy's excellent positioning within the EU's agri-food economy was confirmed yet again in 2024.
This edition introduces a new part dedicated to Social Farming, on the 10th anniversary of the entry into force of Italian Law no. 141 of 2015, which defined the objectives, activities and eligibility criteria for qualified entities, fully confirming its place within the general multifunctionality framework of farming enterprises.
Our thanks go to the large group of CREA researchers, mostly belonging to our Research Centre, for their invaluable work of collecting and organizing data.

Director of the CREA Research Centre for Agricultural Policies and Bioeconomy

Alessandra Pesce

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AREA AND POPULATION

Italy covers a landmass of 302,109 km², which puts it in 8th place among European countries in terms of territorial extension. Around 50% of this area has been given over historically to agriculture, which enshrines values testified by the numerous quality brand productions. The considerable latitude extension means that the pedoclimatic characteristics of Italy's territory are extremely varied, favouring the development of extremely diversified cultivation systems. That said, agricultural areas have seen a progressive and continuous contraction due to an increase in artificial areas and expansion of wooded and semi-natural environments (ISPRA data). More than half of the UAA – Utilized Agricultural Area – is arable land, 17% of it for permanent crops such as fruit and olive trees, vines and citrus fruit; finally, the percentage of UAA for permanent grassland and pastures underlines the importance of the landscape and environmental component in Italy's agricultural activity.

Artificial areas
Agricultural areas
Forests, semi-natural
Water and wetlands
Coastline

302.109 KM² OF LAND AREA
8,341 KM OF COASTLINE

ARTIFICIAL SURFACES
2,157,460 ha

12,431,808 ha of UAA:

Arable land (58% UAA)
7,185,011 ha

Permanent crops (17% UAA)
2,113,662 ha

Olives
985,481 ha

Vines
629,517 ha

Orchards
386,631 ha

Citrus
112,033 ha

Permanent meadows and Pastures (25% UAA)
3,068,532 ha

FORESTS AND SEMI-NATURAL AREA
12,967,442 ha

TOTAL POPULATION AT 1 JANUARY 2025

58.934 million

CITIZENSHIP

58.934 million

89% ITALIANS

11% FOREIGNERS

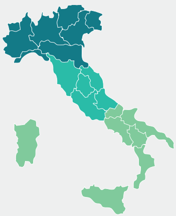
POPULATION OF RESIDENT FOREIGNERS

5.422 million

+169 thousand than previous year

+3.1%

STRANIERI RESIDENTI



58.2% IN THE NORTH

24.4% IN THE CENTRE

17.3% IN THE SOUTH

OLD AGE INDEX (NO. ELDERLY/100 YOUNG)

207,6%

+ 69.6% in the last 20 years

AVERAGE AGE OF POPULATION

2024: 46.8

2023: 46,6

POPULATION BY AGE %

	0-14 YEARS	15-64 YEARS	65 YEARS AND ABOVE
2024	11.9%	63.4%	24.7%
2023	12.2%	63.5%	24.3%

GROSS DOMESTIC PRODUCT

The year 2024 ended with moderate but stable economic growth, amid easing inflation, a recovery in foreign trade, and improved public finances. Although real GDP growth remained subdued, macroeconomic signals pointed to a gradual normalization after the turbulence of previous years.

GDP at current market prices reached €2,192,182 million, up 2.9% compared to 2023. In real terms, the increase was 0.7%, confirming the moderate pace of expansion already observed the previous year. Growth was driven primarily by domestic demand, with a positive contribution from both domestic final consumption (+1.2%) and gross fixed investment, which continued to grow, albeit at a slower rate than in 2023.

At a territorial level, the South maintained a good performance, although less marked than the previous year, while the North-West recorded

GROSS DOMESTIC PRODUCT

Gross Domestic Product
2,192,182
million current euros
+2.9%

Public Administration Net Borrowing
-73,937 million
-3.4% of GDP

TRADE BALANCE: TOTAL SURPLUS OF €54.9 BILLION

Public Debt
134.9% of GDP

Tax burden on GDP
42.5%

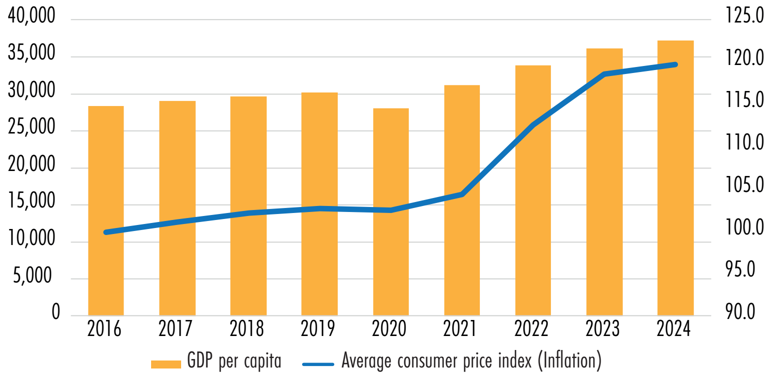
growth in line with the national average.

Per capita GDP rose to €37,176, an increase of 2.9% compared to 2023, indicating an improvement in the average disposable income per citizen.

The Consumer Price Index recorded an increase of 0.9% compared to 2023, highlighting a significant slowdown in inflation compared to the 5% increase of the previous year. This decline was driven by falling energy prices and the stabilization of food prices.

In 2024, imports of goods and services recovered, with a positive change of 4.0%, following the sharp decline of 2023 (-10.4%). Exports showed more moderate growth, at +3.3%, an improvement compared to the stagnation of the previous year. The trade balance benefited from this pattern of events, with a surplus of 54.9 billion euros, a marked improvement compared to 2023, mainly thanks to reduction in the energy deficit and the resilience of non-energy exports.

GDP per capita combined with the average consumer price index



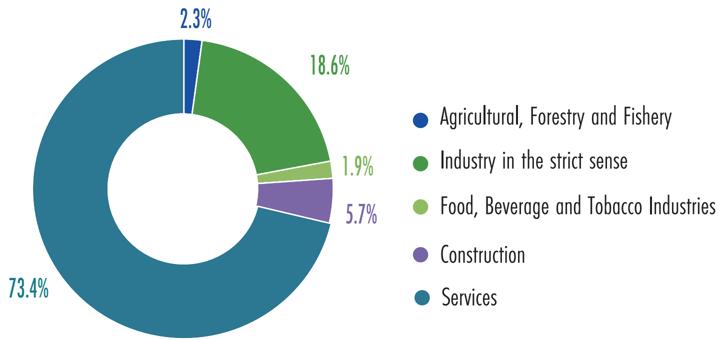
Source: ISTAT.

The ratio of net borrowing of Public Administrations to GDP continued to improve, maintaining the positive trend of 2023.The tax burden rose by approximately one percentage point, while the reduction in interest expenditure contributed to an improvement in the primary balance.

ADDED VALUE

In 2024, the Agriculture, Forestry and Fisheries sector showed signs of recovery after the difficulties faced in 2023, when adverse weather conditions and an increase in the costs of production inputs had negatively affected volumes and value added. The latter, at the sector level, grew by 11.4% compared to the previous year, reaching 44.4 billion euros and slightly increasing its incidence on the national economy as a whole, rising from 2.2% to 2.3%. This result reflected a positive trend both in terms of value and production, favoured by a stabilization of costs and a maintenance of selling prices, which continued to grow, albeit at a slower rate than in the past.

Added value by sector (%), 2024



Source: ISTAT, National Accounts

Recovery of the agricultural sector was part of a broader economic context in which services maintained the dominant share, with a value added of 1.438 billion euros and a growth of 4.1%, while construction recorded a marginal increase of 0.2%. In contrast, the non-construction industry suffered a contraction of 4.2%, falling to 364.5 billion euros. The food, beverage and tobacco industries, closely linked to the agricultural sector, continued to grow, with an increase of 3.5% and an added value of 37 billion euros, confirming the strategic role of the agri-food sector within the national production system.

EMPLOYMENT

The growth in the number of employed in the entire Italian economy continued, and, according to the ISTAT Labour Force Survey, was estimated to have reached just under 24 million people last year (+1.5%). The only economic sector which saw a decrease was Agriculture, Forestry and Fisheries (-3.3%). Growth affected both genders even if there was still a substantial gap in employment rates to the detriment of women (18 percentage points), while at a territorial level the highest growth in the number of employed was confirmed in the South (+2.2%) compared to the Centre (+1.9%) and Northern Italy (+1%). The expansionary dynamics mainly involved permanent employees (+3.3%), while the age groups that benefited most from the growth process were those between 55-64 years old (+1.7%) and between 45-54 years (+1.3%). The decrease in the unemployment rate was confirmed, reaching a value of 6.5% (-1.1%).

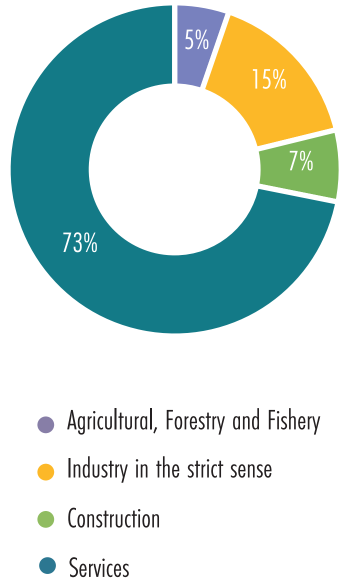
EMPLOYMENT IN ENTIRE ECONOMY

23,932,000 (+1.5%)

EMPLOYMENT IN AGRICULTURAL SECTOR

820,000 (-3.3%)

Total work units, 2024

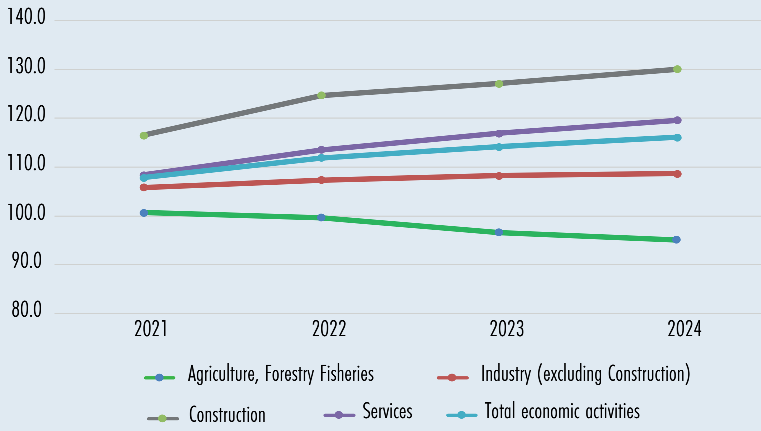


Source: ISTAT, National Accounts

PRODUCTIVITY

In 2024, labour productivity in Italy showed a slight improvement compared to the stagnation recorded in 2023.
For total economic activity, the index marked an increase of 1.66%, in contrast to the decline of 1.71% in the previous year. This figure, although modest, represented a positive sign in a context in which productivity had historically driven a weak GDP growth in volume, contributing to a growth gap in comparison with the main European economies.
In sectoral detail, Industry (excluding the Construction sector) recorded a positive change of 0.41%, reversing the negative trend of 2023. Services show a more marked growth, equal to 2.28%, while Construction continued to stand out for its dynamism, with an increase in productivity of 2.33%. In contrast, the Agriculture, Forestry and Fisheries sector suffered a new downturn, with a decrease of 1.55%, confirming the structural difficulties that characterize it.

Labour productivity - value added at chained basic prices per hour worked - 2020 indices=100



Source: ISTAT.

BIOECONOMY

In 2024, in Italy, all the activities related to the Bioeconomy generated a turnover of 426.8 billion euros and employment for over two million people. The year 2024 saw a slight contraction (-0.4%) compared to 2023, due to major heterogeneity in the performance of the individual sectors making up the Bioeconomy as a whole: the success of the agri-food supply chain was contrasted by a reduction in sectors with high specialization, such as the wood supply chain and the fashion sector. That said, the impact of the Bioeconomy on the total Italian economy was still significant, equal to 10% and 7.7%, respectively, in terms of production value and employment.

The sectors that make up the Italian Bioeconomy played a significant role, since they represented 14% of the total output generated by the Bioeconomy within the EU.

A good 64% of the Bioeconomy value came from the agri-food chain, with an output of over 272 billion euros, of which around 195 billion came from the Food, Beverage and Tobacco industry. In contrast, 931,000 people were employed in the agricultural sector and 489,000 in the Food industry, respectively 46% and 24% of the total national Bioeconomy. The employment figure showed a positive trend for the agri-food supply chain sector compared to 2023 values; in particular, for the agricultural sector at +0.5%, compared to -1.2% in 2023 and for those of downstream processing +2.1%, compared to +1.7% in 2023.

AGRI-FOOD VALUE IN THE BIOECONOMY COMPLEX
63.9%

AGRICULTURE, FORESTRY AND FISHERIES
77,642 million euros
equal to **18.2%**

FOOD, BEVERAGE & TOBACCO
194,927 million euros
equal to **45.7%**

Value of the Bioeconomy in Italy

Production Sectors	Production Value (million euros)				% Impact	Employment 2023		Employment 2024	
	2021	2022	2023	2024	2024	Thousands	%	Thousands	%
Agricultural, Forestry & Fishing	64,710	74,274	75,167	77,642	18.2	872	44.1	931	45.7
Food, Beverages & Tobacco	156,005	181,835	193,832	194,927	45.7	492	24.9	489	24.0
Bio-based Textiles	9,580	11,543	11,006	9,805	2.3	49	2.5	48	2.4
Bio-based Clothing	13,260	15,442	16,555	15,328	3.6	83	4.2	84	4.1
Bio-based Tanning and Leather Goods/Footwear	16,461	20,387	20,437	17,842	4.2	86	4.3	84	4.1
Wood and Wood Products	15,736	19,248	16,502	15,475	3.6	89	4.5	111	5.4
Paper and Paper Products	26,860	34,697	30,551	29,421	6.9	80	4.0	77	3.8
Bio-based Chemicals	3,792	6,008	5,186	4,993	1.2	8	0.4	9	0.5
Bio-based Pharmaceuticals	14,030	16,297	17,694	18,977	4.4	39	2.0	44	2.1
Bio-based Rubber & Plastic	1,523	1,095	1,011	964	0.2	5	0.3	4	0.2
Bio-based Furniture	13,737	13,885	13,539	13,218	3.1	75	3.8	57	2.8
Bioenergy	3,301	6,151	1,902	2,408	0.6	2	0.1	2	0.1
Biofuels	2	2	2	2	0.0	N/A	-	N/A	-
Water Cycle	13,131	14,436	14,406	14,744	3.5	45	2.3	5	2.6
Management and Recovery of Biodegradable Waste	10,659	9,787	10,697	11,103	2.6	54	2.7	45	2.2
BIOECONOMY TOTAL	**362,788**	**425,087**	**428,487**	**426,849**	**100.0**	**1,979**	**100.0**	**2,038**	**100.0**

Source: 11th report "The Bioeconomy in Europe", Intesa Sanpaolo

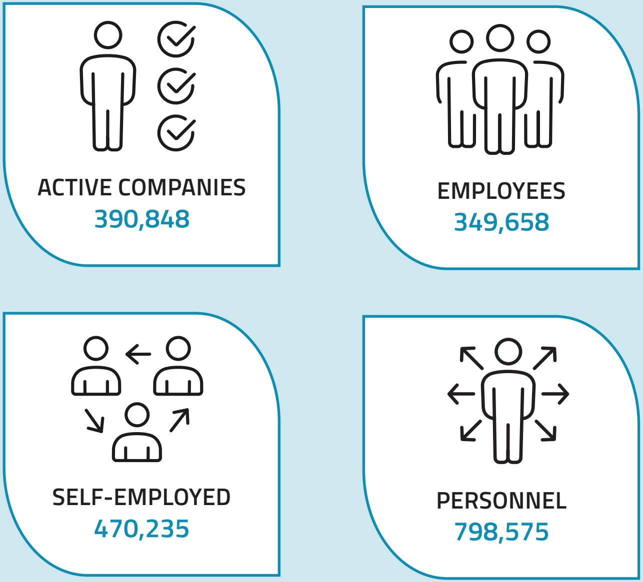
FARMING ENTERPRISES IN THE ASIA-AGRICULTURE REGISTER

Methodological and contextual aspects

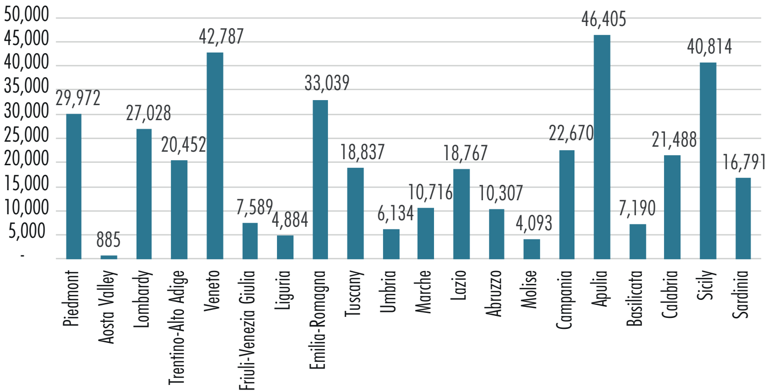
Labour force

METHODOLOGICAL AND CONTEXTUAL ASPECTS

The ASIA Register for Agriculture is produced annually by ISTAT and includes companies active in the Agriculture, Forestry and Fisheries sector of economic activity, i.e. entities that have carried out an effective productive activity during the year, even if for a limited period of time and that are classified in the agricultural sector according to the criterion of the main economic activity carried out. The data produced cover the whole of Italy's national territory.
The size of each company is measured in terms of personnel – employees and self-employed – calculated as job positions on an annual average.
This statistical register is the result of a procedure which processes data from non-ISTAT sources, in particu-



Distribution of number of enterprises by region, 2023



Source: CREA calculations from ISTAT data

lar:

1. Revenue Agency – Registry Office - Tax of legal persons and natural persons with a VAT number
2. National Institute of Social Security (INPS) – Archive of Autonomous Agricultural Workers
3. National Institute of Social Security (INPS) – Archive relating to the Declaration of Agricultural Labour (DMAG Model)
4. Chambers of Commerce, Industry, Agriculture and Crafts –The latest available data are those relating to the year 2023 and give us a total number of 390,848 active companies, a marginal increase compared to the previous year (+0.2%).
5. National Institute of Social Security (INPS) - UNIEMENS - contribution part and remuneration part

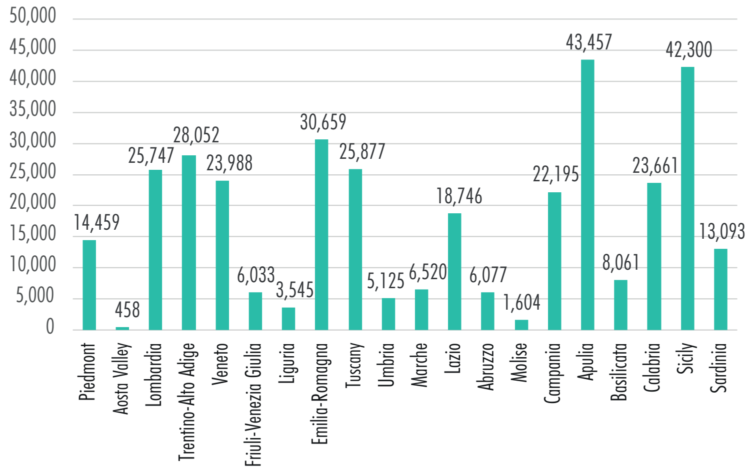
The latest available data are those relating to the year 2023 and give us a total number of 390,848 active companies, a marginal increase compared to the previous year (+0.2%). The regions with the highest number of active companies are Apulia, with more than 46,000 companies, equal to around 12% of the total, followed by the Veneto, with over 42,000 companies, equal to around 11%, and Sicily with the presence of just under 41,000 companies, equal to 10.4% of the total.

LABOUR FORCE

Also in terms of the number of employees, which overall numbered 349,658, Apulia was still the region featuring the highest result, with 43,457 employees, followed very closely by Sicily with 42,300 employees in total, far from Emilia Romagna and Trentino-Alto Adige.

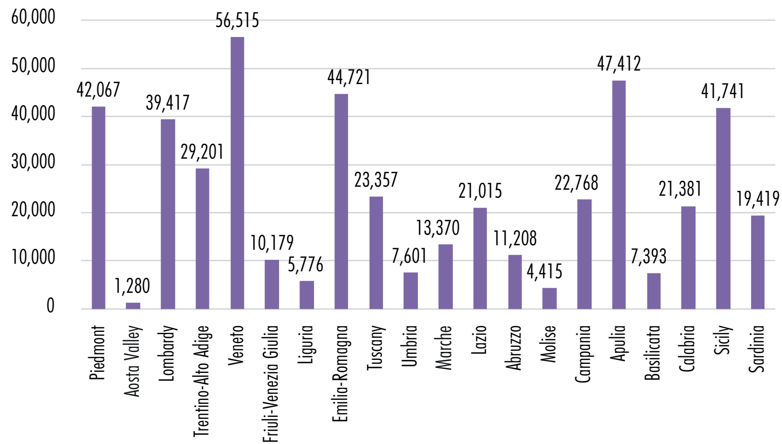
The ASIA register also includes the self-employed, which includes individual entrepreneurs, freelancers and self-employed workers, assisting family members (if they work in the company without the payment of a predetermined contractual salary and pay contributions for social security or accident insurance at work), members of partnerships or corporations, provided that they actually work in the company. In this case, we are talking about 470,235 self-employed in total and at a regional level, unlike the employees figure, it was Veneto that had the highest number with over 56,000 individuals equal to 12% of the total, but again followed by Apulia with over 47,000 self-employed. At about 10% of the total, it consistently ranks among the top regions in entrepreneurship

Distribution of number of employees by region, 2023



Source: CREA calculations based on ISTAT data

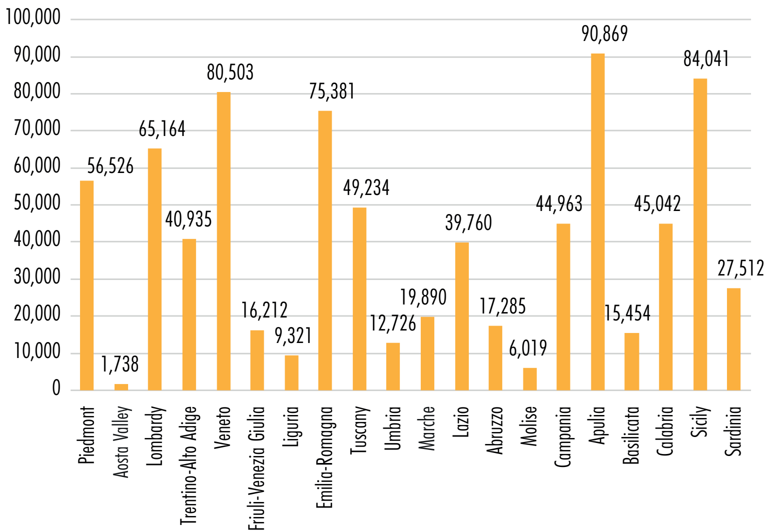
Distribution of number of enterprises by region, 2023



Source: CREA calculations based on ISTAT data

and agricultural work. Following, with fairly high numbers, are Sicily, Emilia-Romagna, and Piedmont.
Finally, the number of personnel was examined, a term used to refer to people employed in a legal-economic unit, such as the self-employed, or full-time and part-time employees (or those with an internship agreement), even if temporarily absent (secondment, holiday, illness, suspension from work, temporary layoff benefit scheme, etc.).
In this case, at a national level, the ASIA register showed a total of 798,575 personnel, who were distributed at a regional level following the outlines drawn previously for the other variables examined. In effect, Apulia and Sicily were the regions with the largest numbers (respectively with around 10% of the total, proving to be always at the top of the list in entrepreneurship and agricultural work. To be followed, with fairly high numbers, also by Sicily, Emilia-Romagna and Piedmont (90,869 and 84,041 personnel), and then Veneto and Emilia-Romagna. On average, each company had 2 personnel, but in some regions, the median was higher, for example, in Tuscany and in Lombardy (with 2.6 and 2.4 aver-

Distribution of number of personnel by region, 2023



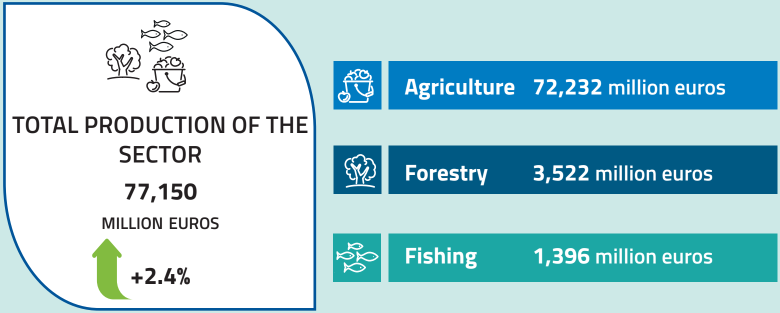
Source: CREA calculations based on ISTAT data

age personnel per company respectively). In contrast, in other regions, such as Molise and Sardinia, the average number of personnel was lower (1.5 and 1.6 respectively).

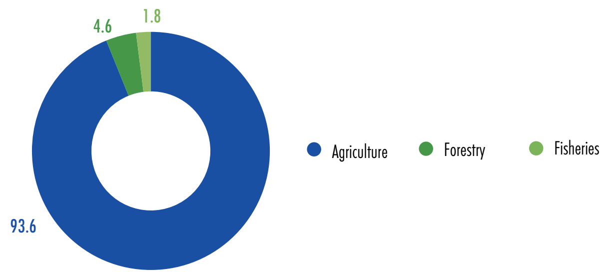
AGRICULTURE FORESTRY AND FISHING

PRODUCTION IN AGRICULTURE, FORESTRY AND FISHING

The year 2024 was substantially positive as regards the performance of Italy's primary sector, with the production value of the Agriculture, Forestry and Fishing (AFF) branch showing growth at current values of +2.4%, to earn itself over 77 billion euros. This positive change was the result of a moderate growth in production volumes (+0.6%), accompanied by a more substantial positive change in prices (+1.8%), albeit much less than that of the previous year. The value added of the entire sector showed a more pronounced evolution, with a change in value of 11.4%, mainly driven by the change in prices (+9.3%), which was positively affected by the drastic drop in production factor costs.
The strengthening of production volumes brought with it an increase in employment across the entire



% composition of the production value of the Agriculture, Forestry and Fishing sector, 2024



Source: ISTAT.

industry, as indicated by the slight increase in AWU (+0.7%), whose evolution corroborated the exit of self-employed individuals (-0.7%), against a marked upward change in the number of employees (+3.1%), whose gross salaries grew by 0.8%. In contrast, the performance of gross fixed investments remained critical, seeing a further decline: both in current values (-1.6%) and in volume (-1.4%).

These positive trends produced a marginal strengthening of the overall impact of the AFF branch on the national economic system, ending up standing at a share of 2.3% of GDP at current values.

The AFF branch remained structurally dominated and driven by the performance of the agricultural component, which alone stood at 93.6%. The forestry sector further strengthened its impact, rising to 4.6% of the total, despite a further contraction in the volumes produced (-0.5%), more than offset by a new increase in prices (+1.4%); a pattern which turned into a nominal increase in production and value added, both with positive variations close to one percentage point. Over the year, the decline in the role played by fisheries did not stop, with a share remaining below 2%. The modest performance of production value (+0.8%) originated from a new erosion of production volumes (-3.4%), cushioned by more lively price changes (+4.2%).

Territorial dynamics saw positive changes in volume, both in production and value added, in all divisions, with the exception of the Islands (-5.2% and -7.6%) and the North-West, which remained almost stationary (-0.1% and -0.7%). Looking at the remaining areas in detail, the North-East saw a growth in volumes both in production (+1.9%) and value added (+4.5%); while the Centre saw these two quantities grow by 2.5% and 5.2% respectively; lastly, the South recorded a positive change in production of 1.6%, but above all in value added (+5.3%).

AGRICULTURAL PRODUCTION

CURRENT PRODUCTION VALUE
72,232 MILLION EUROS
+2.5%

37,180 million euros
Agricultural Crops

22,709 million euros
Livestock Farms

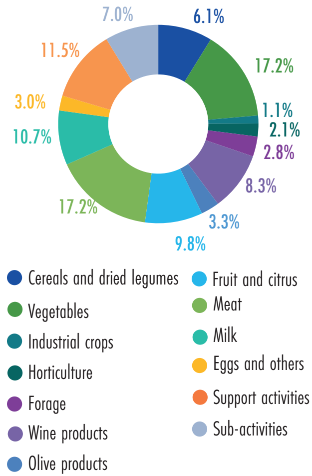
13,602 million euro
and Subactivities

VALUE ADDED IN CURRENT VALUES
40,871 MILLION EUROS
+12.2%

The year 2024 appears to have been characterized by an overall good performance of the agricultural sector, with an increase in production of 2.5% in current values, a synthesis of a moderate volume increase (+0.7%) and a simultaneous increase in prices (+1.8%).
In the main, production trends were positive for Plant production (+0.8% on average in volumes), which were confirmed as the backbone of national agricultural production, accounting for more than half of the value produced in Italy. Of the same magnitude was the variation in volumes produced by the Livestock sector, accounting for over 33% of the total. Meanwhile, among the Diversification activities, those of support showed a further slowdown in the volumes produced, in contrast to secondary activities, which were confirmed as progressively strengthening. The production pattern of crops was not homogeneous across the different products, due to adverse climatic phenomena, which affected some areas and specific productions. Two of the most iconic products of Made in Italy agri-food were proof of this: wine and oil. For wine, although production was recovering, the result was nonetheless lower than the average of recent years, due to damage to the harvest, brought about by bad weather and hail in the North, and drought in the South. The extreme heat in the South also negatively affected the olive oil sector, which recorded a production volume lower than the average of the last five-year period.

Supporting the better results achieved by the agricultural sector, during the year there was a further increase in the prices of agricultural products, which grew by +2.1% in the case of crops, although with negative trends in the case of specific products (especially citrus and cereals, and to a lesser extent dried legumes); instead, the variation in livestock products (+0.7%) was more contained, with significant milk and beef price increases, but decreases for eggs, pork and poultry meat. However, the main positive impact was the significant reduction in factor costs of production, which – after the contraction of the previous year – fell further by

Production of goods and services at basic prices in the agricultural sector - % values at current prices



Source: ISTAT.

Value of production and services at base prices by main sector, 2024

	Current values		% variations 2024/23		
	million euros	%	in current values	chain-linked values	implicit pricing
- Herbaceous crops	19,367	28.3	1.5	-0.3	1.8
- Woody crops	15,788	23.1	7.0	2.5	4.4
- Forage crops	2,024	3.0	-11.9	-0.6	-11.4
- Livestock	22,709	33.2	1.4	0.8	0.7
- Agriculture support activities	8,466	12.4	1.4	-0.7	2.1
PROD. OF AGRICULTURAL GOODS AND SERVICES	68,356	100.0	2.2	0.6	1.6
Secondary activities (+)[1]	5,136	-	5.4	1.8	3.5
Secondary activities (-)[2]	1,260	-	0.0	0.0	0.0
AGRICULTURAL PRODUCTION	72,232	-	2.5	0.7	1.8
Intermediate consumption (including Sifim)	31,360	-	-7.9	-0.9	-7.1
ADDED VALUE OF AGRICULTURE	40,871	-	12.2	2.2	9.8

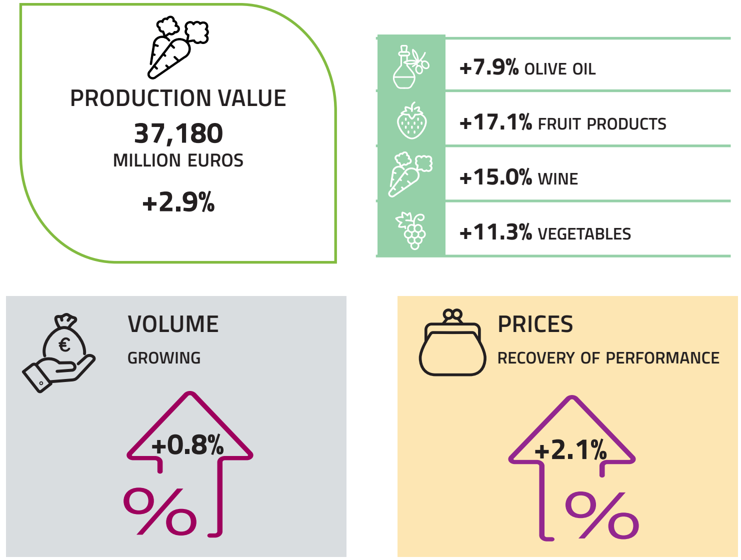
[1] Activities carried out in the agricultural sector, such as holiday farms, processing of fruit, milk, fruit and meat, production of renewable energy, etc.
[2] Activities carried out in agriculture by other economic branches.
Source: ISTAT.

7.1%, allowing a clear recovery in terms of trade (+9.6%), to be added to the positive change of 2023.
The upshot was seen in the agricultural value added which, if it showed a volume increase of just 2.2%, featured a more than positive change in current values (+12.2%).

PLANT PRODUCTION

Plant production represents the main component of Italian agriculture, accounting for over half of its total value. Production performance in 2024 was positive, although volume growth remained below one percentage point, while value growth stood at +2.9%, supported by a strong recovery in crop prices (+2.1%).

Over the year, production results were somewhat erratic in terms of volume. Overall, permanent crops performed better than annual crops (herbaceous and forage), albeit with several exceptions. Among the herbaceous crops (-0.3%), production fell for cereals (-6.9%) and tomatoes (-1.4%), with the latter recovering at least in terms of price variations; on the other hand, the potato (+10.0%) and dried legume (+7.8%) harvests were extremely positive. The forage harvest was slightly negative (-0.6%), and it also suffered a sudden drop in prices (-11.4%), partially re-



absorbing the unprecedented surge that had characterized 2023. Woody crops (+2.5%) saw greater variability in production results, driven upward by vines (+3.6%), whose volumes, however, remained below the ten-year average, as evidenced by the simultaneous increase in prices, which reached +10.5% in the specific case of wine. Fruit crops also performed positively (+10.8% in volume and +5.7% in prices), including

an excellent performance by pears (a harvest up 60.0%). In contrast, the olive (-3.9%) and citrus (-6.3%) harvests suffered from climatic complications which particularly affected the southern area due to drought and extreme heat. However, while the olive sector recovered with a double-digit price increase, reaching +13.2% for olive oil alone, while citrus fruits also suffered from a marked reduction in sales values (-13.3%).
Finally, we must note the good performance of industrial, floriculture and nursery crops, all characterized by slightly increasing volumes, also accompanied by positive price variations, with the exception of industrial crops.

Main plant productions, 2024

	Value[1]	
	000 euros	% variations 2024/23
Wine (000 hl)	4,259,537	15.0
Oil	2,056,592	7.9
Grapes delivered and sold	1,247,520	-5.2
Fodder (hay)	2,024,472	-11.9
Durum wheat	1,534,219	-16.3
Flowers and ornamental plants	1,516,362	3.5
Hybrid Maize (Corn)	1,144,346	-24.2
Tomatoes	1,464,146	7.2
Potatoes	1,144,066	9.7
Apples	1,208,132	10.5
Lettuce	1,285,995	7.4
Table grapes	589,112	8.2
Oranges	688,406	-16.9
Courgettes	730,579	17.1
Common wheat	592,079	-23.0
Artichokes	964,971	70.6
Pears	534,580	34.7

[1] Production at base prices expressed at current values.

Source: ISTAT

LIVESTOCK PRODUCTION

In 2024, the overall impact of the livestock sector on the total production of goods and services of national agriculture in current values stood at just over 33%, having recorded a growth in value of +1.4%, as a result of a slightly positive upward variation in both volumes and prices (+0.8% and +0.7%, respectively).

That said, the behaviour of livestock products was characterized by a generalized increase in production volumes, which however stopped at a few tenths of a percentage point in the vast majority of cases, to reach a noteworthy growth in the case of beef (+2.5%) and milk (+1.4%). The honey sector, in contrast, was the only one to show a worrying new contraction in the quantities harvested (-8.3%), partially offset by an increase in prices (+4.2%).

The evolution in prices was more complex, displaying very different signs and dimensions in the variations, which in any case were down to an effect determined by the dramatic increases recorded over the previous year. The most significant positive increases were recorded in relation to beef (+5.3%), amplifying the already positive result in quantity for this particular sector. This performance was similar in the case of milk, whose prices rose to reach +7.8%. Compared to the general trend, difficulties in the pork and poultry meat sectors came to the fore, both of them remaining almost stationary in volume, while at the same time seeing a contraction in prices (-5.7% and -6.2%). The egg sector also followed the same trend, its production growth being slightly more robust (+0.5%), against a substantial reduction in prices, which came close to double digits: -9.7%.

PRODUCTION VALUE

22,709
MILLION EUROS

+1.4%

-1.1% MEAT

+9.3% MILK

-9.2% EGGS

-4.4% HONEY

Main livestock production[1], 2024

	Value[2]	
	000 euros	% var. 2024/23
Cow and buffalo milk (000 hl)	7,868,376	9.3
Swine	4,050,279	-5.6
Cattle	4,096,838	7.9
Poultry	3,337,788	-6.0
Eggs (million pieces)	1,930,230	-9.2
Sheep and goat milk (000 hl)	754,853	6.0
Sheep and goats	185,994	-3.8
Honey	275,911	-4.4

[1] Live weight for meat.

[2] Production at base prices expressed at current values.

Source: ISTAT

DIVERSIFICATION

The combined value of Diversification activities (support and sub-activities) remained significant, accounting for a share close to 19% of the total production value achieved by operators in the agricultural sector.
Of the more than 13 billion euros produced, just over 62% came from agricultural support activities, and the remaining 38% from sub-activities. Both components showed a positive change in current values over the year, decidedly more pronounced for the sub-activities, which also grew in volume (+1.8%), in contrast to the support components whose volumes showed a slight decrease (-0.7%), in the wake of that already recorded in the previous year.
The performance of aggregate internal agricultural services was influenced by the volumes produced within the two main activities supporting agricultural activity: subcontracting (-1.5%) and primary processing of agricultural products (-0.7%). For sub-activities, a generalized increase in the volumes produced – with the sole exception of animal fedd – stood out, supported by more substantial variations in relation to the processing of fruit and milk, in addition to a further strengthening in the growth of direct sales and marketing, as well as park and garden landscaping activities.
The most conspicuous growth, among all the activities observed, was in the production of energy from renewable sources (+6.2% in volume and +17.4% in value), the value of which, however, stopped at 857 million euros, as a result of a major downward revision of the system for calculating past values.
Despite the reduction in cultivated land, subcontract farming remained firmly in the lead in terms of economic importance, followed by primary processing, and with agritourism

CURRENT PRODUCTION VALUE OF DIVERSIFICATION ACTIVITIES

13,602 MILLION EUROS

SUPPORT ACTIVITIES
8,466 MILLION EUROS **(+1.4%)**
SECONDARY ACTIVITIES
5,136 MILLION EUROS **(+5.4%)**

+1.0% THIRD-PARTY CONTRACTS

+0.5% PRIMARY PROCESSING

+17.4% RENEWABLE ENERGY

+3.3% AGRITOURISM

+4.5% TRANSFORMATION (FRUIT, MILK AND MEAT)

+4.5% DIRECT SALES/COMMERCIALIZATION

Production of supporting and secondary activities in the Agricultural sector

	Current values (millions euros)	Var. % current values 2024/2023	Var. % chained values 2024/2023	% impact
Seed processing for sowing	378	+6.1	+2.0	4.5
New crops and plantations	248	+2.9	-1.5	2.9
Agricultural activities for third parties subcontracting	4.091	+1.0	-1.5	48.3
Primary processing of agricultural products	2.393	+0.5	-0.7	28.3
Maintenance of the land in order to keep it in good agricultural and ecological condition	809	+3.3	+1.5	9.6
Livestock breeding support activities	300	+1.1	+0.5	3.5
Other support activities	248	+2.2	+0.2	2.9
TOTAL SUPPORT ACTIVITIES	**8.466**	**+1.4**	**-0.7**	**100.0**
Aquaculture	10	-0.8	+0.2	0.2
Processing of plant products (fruit)	230	+8.7	+3.0	4.5
Milk processing	480	+7.5	+1.4	9.3
Agritourism, including recreational, social, educational, and other minor activities.	1.934	+3.3	+0.5	37.7
Processing of animal products (meat)	443	-0.5	+0.5	8.6
Renewable energy (photovoltaic, biogas, biomass)	857	+17.4	+6.2	16.7
Handicrafts (woodworking)	92	+4.0	+1.0	1.8
Animal feed production	227	-5.0	-0.5	4.4
Landscaping of parks and gardens	422	+3.3	+1.5	8.2
Direct sales/marketing	441	+4.5	+3.0	8.6
TOTAL SECONDARY ACTIVITIES	**5.136**	**+5.4**	**+1.8**	**100.0**

Source: ISTAT, Economic Accounts for Agriculture

not far behind. These three activities alone accounted for approximately 62% of the value of Diversification in Italian agriculture.

FISHING

The fishing fleet

In 2024, the Italian fleet suffered a new, albeit contained, contraction compared to the previous year (-0.7%), confirming a negative trend that has lasted for over twenty years. This trend, to be found also in many other EU member countries, nevertheless allowed Italy to maintain a prominent position in Europe in terms of the number of its ships.
An analysis of the distribution of the use of vessels by the fishing system brought small-scale fisheries to the fore, confirming them as the system with the largest number of vessels in Italy, reaching a total of 16.7% entire fleet.

Catches and production value by fishing system

The number of landings in Italy in 2024 weighed in at 125,338 tons, an increase of 3.8 percentage points compared to 2023. The economic

FLEET
11,603 (NO. OF BOATS)

LANDINGS
125,338 (TONS)

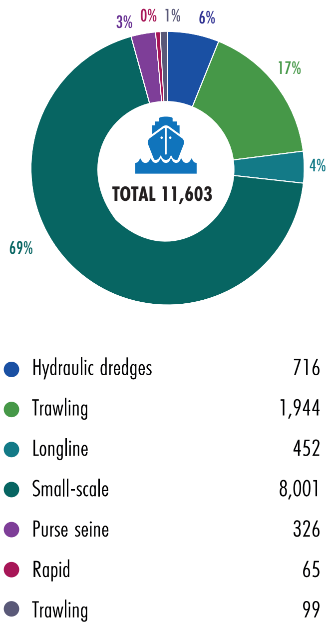
ECONOMIC VALUE
683,72 (MILLION EUROS)

value of catches continued to fall, having lost a further 15 million euros (-2.1%), confirming the serious state of crisis in the fisheries sector in Italy.
As for the economic value of the catch, again in 2024, the trawling system alone accounted for 39.2% of all income and, although reduced, was confirmed as the most profitable and important fishing system for the country. Small-scale fishing was the most important system in terms of boat use and was spread along the entire coast, stressing a strong link with local communities. This fishing system accounted for a percentage of the total income equal to 21%. In terms of landings, trawling was in first place, with a percentage of the total of 26.5%. This was followed by seine fishing (18.2%), and purse seine fishing (16.9%) and hydraulic dredges (16.5%), fishing systems used mainly in the mid-upper Adriatic area for clam fishing.

Geographical distribution of catches

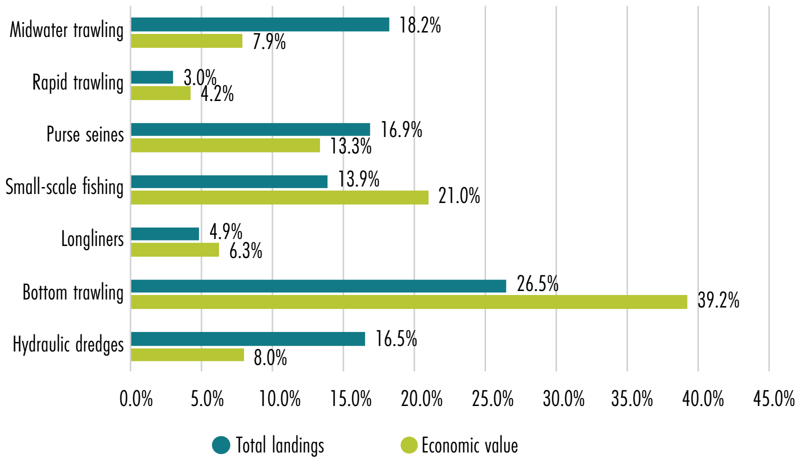
Looking at the geographical distribution of catches, it emerges that 16% of all the catches came from Marche region alone, which would become, starting from 2024, the most important area in terms of landings, with a substantial increase in clam fishing, recognized as the number one species caught in

Fleet by fishing system, 2024



Source: CREA calculations on fisheries data

Catches and economic value by fishing system (% of total), 2024

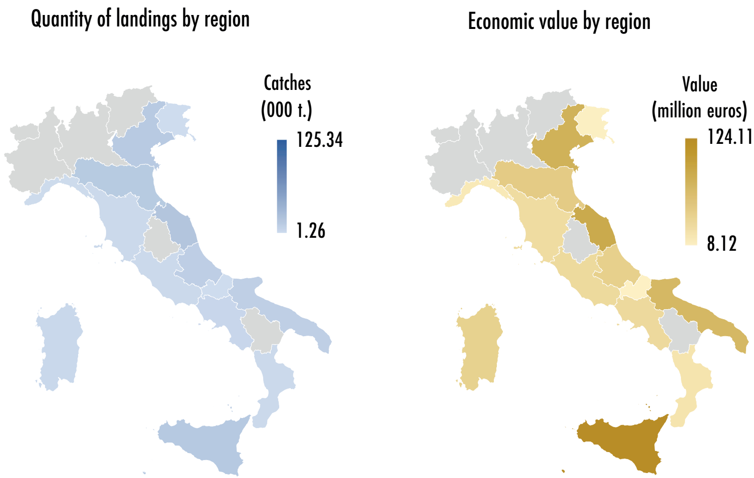


Total quantity of catches 125, 338 tons

Economic value of landings 683.72 mln. euros

Source: CREA calculations on fisheries data

Geographic distribution of catches and production value, 2024



Source: CREA calculations on fisheries data

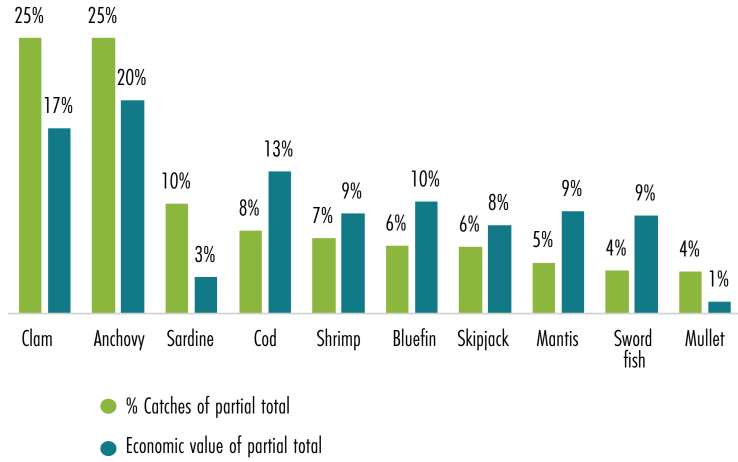
Italy. The region of Sicily lost its primacy and fell to second place, with a still significant percentage share, equal to 13% of the Italian catch. This was followed by Northern Italy, with the regions of Veneto and Emilia-Romagna, accounting for 12% of all landings.

In terms of production value, Sicily ranked alone in first place, with a share in value equal to 18% of the entire Italian catch and an amount of 124 million euros. The regions of Marche (13%), with an economic value of 87 million euros, and Veneto (11%), which in 2024 brought revenues to Italy of 78 million euros, also stood out.

The main species caught and their economic value

Of the approximately 200 species fished in Italy, ten alone accounted for 61% of all landings and 42% of total income. Data on the composition of the catch in 2024 showed that the clam had acquired first position as a target species. Anchovy and sardine slid into second and third place. These three species, together, accounted for 17% of all Italian catches, with an economic value of 114 million euros. The anchovy was however confirmed as the first species in terms of total income, with a share of the value of partial production equal to 20% (first ten target species). In addition to the first three species, the economic value of cod, equal to 13% of total income, and bluefin tuna (10%), while cuttlefish disappeared from the list of the ten main target species.

Catches and production value for the top 10 species caught in Italy (%), 2024



Source: CREA calculations on fisheries data

PRICES AND COSTS

In 2024, the average prices of products sold by farmers recorded minimal upward changes (+1.1%).
The prices of plant products increased by an average of 1.4%, with significant increases for woody crops, in particular for olive oil (+28.8%), which reconfirmed the trend of 2023, and for wine (+8%).
In contrast, marked declines were observed for fodder (-21.8%) and cereals (-13.7%).
With regard to livestock products, prices grew more moderately (+0.7%), with differentiated dynamics between the various categories: there were increases for mutton and lamb (+6.3%) and beef (+5.2%), but decreases for poultry meat (-5.7%) and pork (-5.6%).
Analysing the costs incurred by farmers, the prices of goods and services used in agriculture increased by an average of 1.5% in 2024. Driving this increase were, in particular, veterinary products (+5.1%), seeds (+3.6%), pesticides (+2.6%), energy products (+2.1%) and fertilizers (+1.6%) were particularly significant. Instead, feed prices decreased (-0.9%).
The terms of trade of the agricultural sector, calculated by comparing the producer price index to that of intermediate consumption prices decreased only slightly compared to the previous year, due to very similar variations in the two indices and in the same direction.
In the five-year period 2020-2024, production prices increased by around 34%, which was much more pronounced than the growth in cur-

PRICES OF PRODUCTS SOLD
+1.1%

Prices of plant products
+1.4%

Prices of animals and animal products
+0.7%

PRICES OF CAPITAL GOODS PURCHASED
+1%

PRICES OF INTERMEDIATE GOODS PURCHASED +1.5%

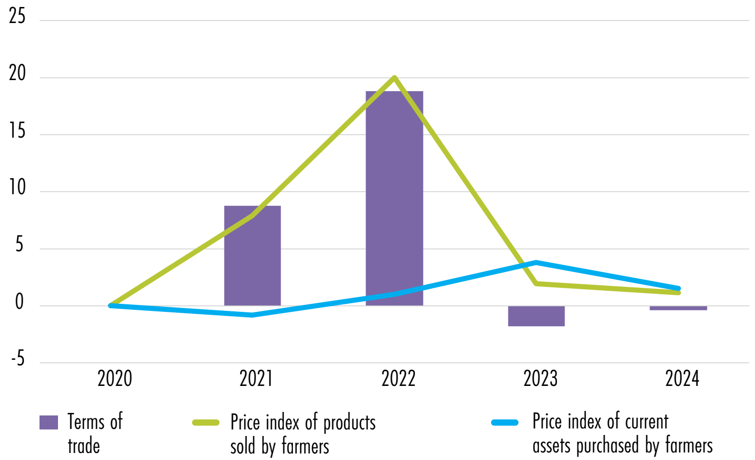
Fertilizer prices
+1.6%

Animal feed prices
-0.9%

Energy and lubricant prices
+2.1%

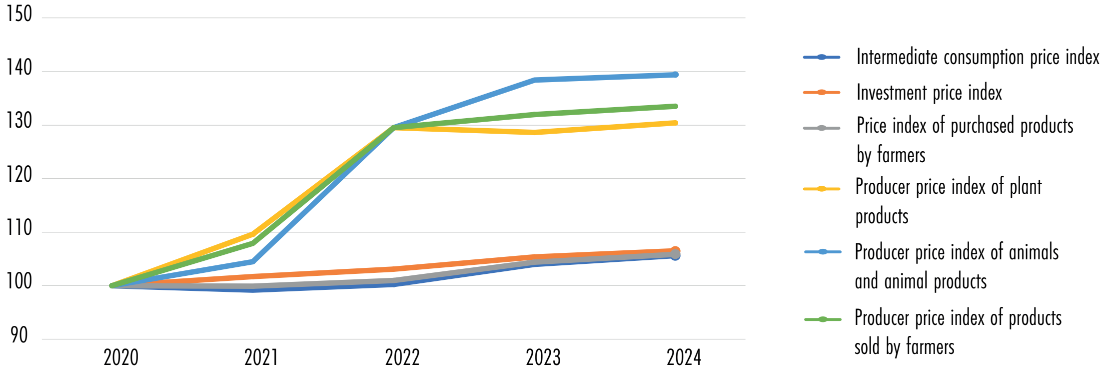
rent production input prices (+5.6%), thus favouring an increase in the terms of trade of over 26%. Even when including capital goods, whose prices rose by almost 7%, among the inputs, the relationship between selling and buying prices showed the same variation. The increase in production prices was linked to bullish pressures which affected both the Livestock sector (+39.4%) and that of plant products (+30.4%). The former was driven, in particular, by the Swine sector (+46.4%), the second by that of Horticulture (+38.6%). All the other sectors analysed recorded significant variations, even exceeding 20%, with the exception of Wine, whose selling prices grew by just under 13%. As regards intermediate goods and services, the increase in prices was mainly due to circumstances that affected veterinary expenses (+13.7%) and those for energy and lubricants (+12.2%), offset by a reduction in expenditure on fertilizers (-5.4%).

Annual change in price indices and terms of trade (%)



Source: ISTAT

Price index of products bought and sold by farmers - index numbers (2020=100)



Source: ISTAT

INCOME

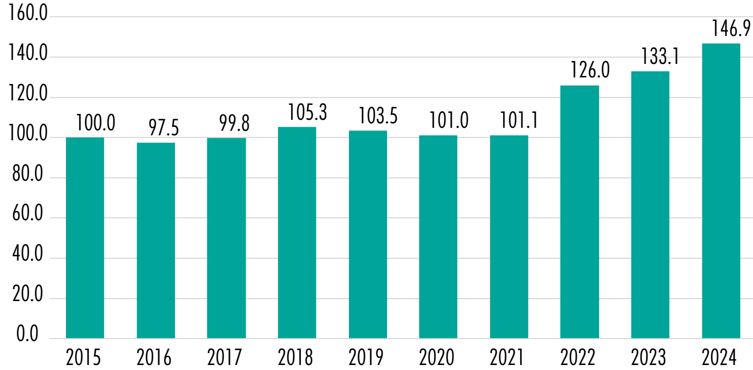
Eurostat estimates relating to the value of agricultural income per annual work unit at factor cost, confirmed the positive trend that had already been emerging in recent years for Italy; in fact, for 2024 there was a value of around 147 euros, an increase of 9.4% compared to the previous year. The estimate of this value was obtained by considering the value of the indicator of 2015 (base year) to be 100 and the Italian one was higher than both the European average of 137.8 euros, and that of our most direct competitors in agri-food, namely, France (99 euros), Spain (117.4 euros) and Greece (137.5 euros).

Furthermore, from the ISTAT estimates relating to the general revision of the National Economic Accounts, it emerges that, in 2024, income from employee work attributed to the Agriculture, Forestry and Fisher-

AGRICULTURAL INCOME PER WORK UNIT (EUROSTAT INDICATOR)

147 EUROS (+9.4%)

Index of real factor income in agriculture per annual work unit (euro), 2024



Source: CREA calculations on fisheries data

ies sector amounted to around €10.4 billion, a slight increase compared to the previous year. The impact of the agricultural sector remained rather limited (only 1.2%) compared to the total estimated income of employees in our country, which amounted to about 866 billion euros for 2024. Total economic activity recorded an overall increase of 5% and, despite the fact that the agricultural sector saw a more contained growth (+0.9%) than the other sectors of the economy, the positive trend that had emerged for it in previous years was again confirmed.

PRODUCTION FACTORS

Intermediate consumption

Work and employment

Investments

Credit

INTERMEDIATE CONSUMPTION

In 2024, intermediate consumption at current values in the agricultural sector continued to decline, marking a further decrease of 8%. The main factor behind this contraction was the reduction in prices (-7%). An analysis of individual cost items showed widespread decline, mainly driven by the fall in prices, and affecting fertilizers and energy in particular. Bucking the trend, costs for seeds increased by 5% due to price rises, while those for plant protection products remained virtually unchanged. The composition of average consumption changes in direction compared to the previous year with a greater impact of seeds and seedlings and other goods and services, which together gained two percentage points, against a reduction in the energy component that lost two percentage points.
The Fisheries sector showed a similar pattern, but with a drop in inter-

AGRICULTURE

31,360 MILLION EUROS

FERTILIZERS **-13%**

ENERGY **-19%**

REUSE **-8%**

FEED **-7%**

SEEDS **+5%**

FORESTRY

696 MILLION EUROS

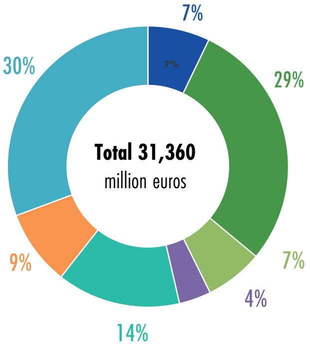
FISHERIES AND AQUACULTURE

694 MILLION EUROS

INTERMEDIATE COSTS IN AGRICULTURAL PRODUCTION

43%

Breakdown of intermediate agricultural consumption (% of total), 2024



Seeds and seedlings	2,239
Animal feed and miscellaneous livestock expenditure	9,060
Fertolizers	2,093
Plant protection products	1,153
Motive power	4,464
Re-use	2,732
Other goods and services	9,618

Source: ISTAT

mediate consumption (-8%) due in equal measure to decreases in prices and quantities. The forestry sector, in contrast, showed substantial stability, the result of compensatory effects: prices were rising (+2%), while quantities were falling by the same amount.

WORK AND EMPLOYMENT

Over the last year, there was a reduction in the overall number of people employed in agriculture nationwide, principally as a result of the sharp contractions recorded in Central Italy (-12%). More than half of the personnel were working in the South (51%), while the remainder were fairly evenly distributed across the other territorial subdivisions. The ISTAT national accounts showed a very marginal increase in total work units in agriculture (+0.4%).
Self-employed workers recorded a rather high numerical contraction in 2024 (-8.8%) compared to the employee component (+1.4%), which continued to prevail over the previous one. Women's employment was characterized by a sharp contraction (-6%), significantly higher than the male one (-2.3%).
Young people between 15 and 34 years of age were the age group that

WORK UNITS IN AGRICULTURE

1,157,000

EMPLOYED IN AGRICULTURE BY AGE GROUP

15-34 YEARS
158,000 PEOPLE(-8,2%)

35-89 YEARS
662,000 PEOPLE (-2%)

EMPLOYED IN AGRICULTURE BY GENDER

MALES
615,000 (-2,3%)

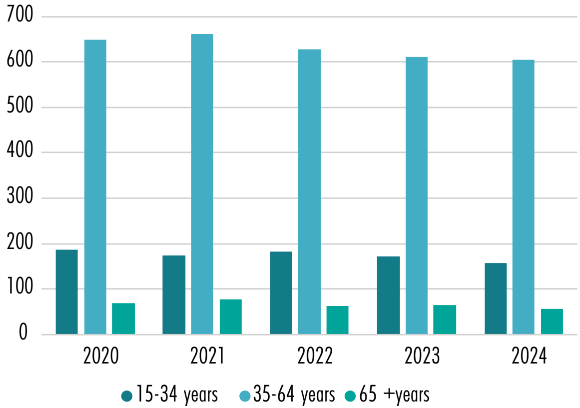
FEMALES
205,000 (-6%)

Employment trends in Agriculture, Forestry and Fisheries (000)

	2020	2021	2022	2023	2024
Employees	490	490	484	462	468
Self-employed	415	424	391	386	352
Total	905	913	875	848	820

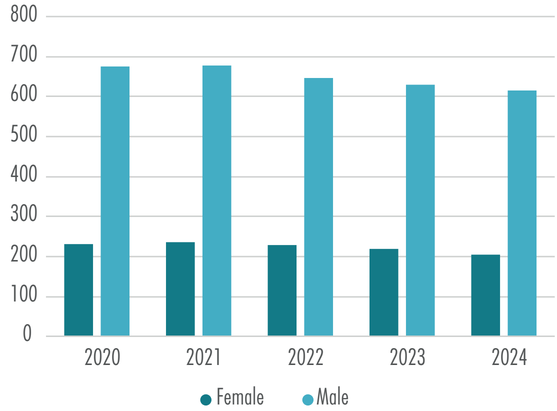
Source: ISTAT

Employment by age group in Agriculture, Forestry and Fisheries (000)



Source: ISTAT

Employment by gender in Agriculture, Forestry and Fisheries (000)



Source: ISTAT

suffered most in this negative employment picture (-8.2%) and their incidence with respect to the total number of employees in agriculture further contracted (around 19%). The number of personnel of foreign citizenship recorded an increase (+7.4%).

INVESTMENTS

The agricultural sector continued to represent a moderate share of national investments, with signs of a structural decline in capital, despite the relatively high impact of investments compared to the value added produced.

In 2024, gross fixed investments in the total economy amounted to 481.5 billion euros, with a clear prevalence of the Services sector (73.2%), followed by Manufacturing (16.5%), Construction (2.3%) and finally Agriculture, Forestry and Fisheries (2.1%).

For Agriculture, gross fixed capital formation stood at €10.3 billion current (€8.9 billion in constant terms), marking a decrease of 1.6% compared to 2023. In a historical comparison, after the growth of the two-year period 2020-2021, agricultural investments showed a fluctuating performance, with a progressive reduction in real terms plus a decline in capital stock (from 136.8 to 130.4 billion euros between 2020 and 2024).

In 2024, the investment/value added ratio showed a particular intensity in the agricultural sector (28.1%), higher than the overall average (25.1%), and that of Services (24.8%). The Construction sector, on the other hand, stood out for its much lower value (9.7%).

In terms of investments per work unit, Agriculture (8,033 euros) is well below the average for the economy (17,338 euros), with values far removed from Services (17,253 euros), but higher than Construction (5,611 euros).

The capital stock per work unit showed an even greater gap: with Agriculture stopping at 117,285 eu-

GROSS FIXED CAPITAL FORMATION FOR AGRICULTURE, FORESTRY AND FISHERIES
10,291 MILLION EUROS

MANUFACTURING INDUSTRY
79,495 MILLION EUROS

Agricultural investments out of total **2.1%**

Investments per work unit **8,033** EUROS

Agricultural investments out of value added **28.1%**

Net capital stock per work unit **117,285** EUROS

Trend in investments gross fixed and gross fixed capital stock for Agriculture, Forestry and Fisheries

Years	Investments (current values) million euros	Var. Previous year %	Investments (constant values *) million euros	Capital stock** (constant values *) million euros	% Investments *** inv. tot. Economy	% Investments *** Agricultural VA
2020	8,711	-	8,711	136,825	2.9	27.1
2021	10,497	20.5	10,096	135,814	2.7	31.7
2022	11,009	4.9	9,767	134,627	2.5	29.6
2023	10,459	-5.0	9,056	132,694	2.1	29.0
2024	10,291	-1.6	8,933	130,432	2.1	28.1

* Chained values, base year 2020.
** Stock of non-financial assets net of depreciation and amortization
*** Incidence of chained values, base year 2020; Agriculture VA at basic prices. Source: CREA calculations from ISTAT data
Source: CREA calculations from ISTAT data

ros, less than half of the national average (245,340 euros) and very far from Services (278,817 euros).
The value-added/capital stock ratio, which measures efficiency in the use of capital, was particularly high in Construction (159.9%) and the Manufacturing Industry (59.3%), while Agriculture had a low value (24.4%), indicating a relatively low productivity from the capital employed.

Gross fixed investments: ratios characteristics for main sectors, 2024*

	Investments in value added (%)	Investments in work units (euros)	Capital stock per work unit (euros)	Added value Capital Stock[2] (%)
Agricultural, Forestry and Fisheries	28.1	8,033	117,285	24.4
Manufacturing Industry	25.9	-	-	59.3
Construction	9.7	5,611	36,184	159.9
Services[1]	24.8	17,253	278,817	25.0
TOTAL ECONOMIC ACTIVITIES	25.1	17,338	245,340	28.2

* Chained values, base year 2020
[1] Gross of investments in housing.
[2] Stock net of depreciation.
Source: CREA calculations from ISTAT data

CREDIT

In 2024, the amounts from loans granted by banks to the Italian Agriculture, Forestry and Fisheries sector continued to decrease, from 39,421 to 38,228 million euros (-3% compared to the previous year).
The territorial distribution of agricultural credit structurally favoured the districts of Northern Italy, which were backed by the majority of national loans (around 63%). However, the economic situation in 2024 showed trends that primarily penalized the constituencies of Northern and Central Italy, with negative variations of 4.2% for the North-West, 3.2% for the North-East, and 3.1% for the Centre.
Even less encouraging were the signs coming from the medium and long-term loan front, which showed a significant contraction of 6.6% during the year analysed. Over the last decade, the cumulative reduction was around 37%. The down-

BANK LOANS DISBURSED IN 2024

Agricultural, Forestry and Fishing
38,228 MILLION EUROS

Food and Beverage Industry
33,634 MILLION EUROS

"BEYOND SHORT-TERM" LOANS TO AGRICULTURE

Total **7,922** MILLION EUROS

Purchases of machines and equipment
3,484 million euros

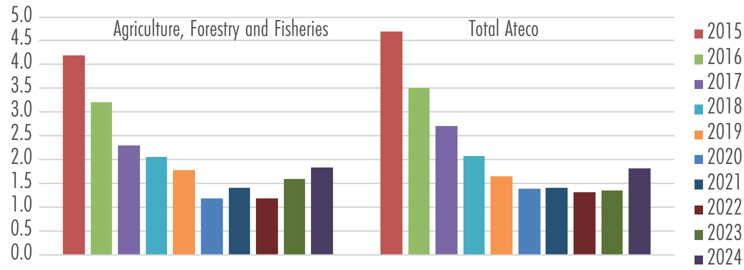
Rural building construction
1,999 million euros

Rural property purchases
2,438 million euros

LOANS GRANTED TO AGRICULTURE BY DISTRICT

turns of 2024 concerned all types of destinations for these loans, with significant variations, especially when it came to the construction of rural buildings (-8%).
The territorial structure of funding for more than a year saw the regions of Northern Italy prominent, accounting for 61% of the national amounts, while the distribution of funding between the types of pri-

Annual rate of non-performing loans (%)



Source: CREA calculations from Bank of Italy data

Bank loans to Agriculture, Forestry and Fisheries - December 2024

	Agriculture (million euros)	Variations % on previous year	% of total agriculture funding	% of total financing of production industries
North-West	10,383	-4.2	27.2	4.0
North-East	13,588	-3.2	35.5	7.8
Centre	6,716	-3.1	17.6	4.8
South	5,040	-1.2	13.2	7.1
Islands	2,501	-0.5	6.5	9.5
Total	38,228	-3.0	100.0	5.7

Source: CREA calculations based on Bank of Italy data mary use for machinery and equipment came top (44% of the total), followed by the purchase of real estate (31%).

The negative economic situation in 2024 in medium- and long-term loans mainly penalized the regions belonging to the North-West and Central districts, showing reductions of 7.9% and 7.5%. respectively. Credit quality deteriorated slightly during the year under review: the rate of deterioration, given by the ratio between the number of new loans that become non-performing and the stock of loans existing at the beginning of the period, rose from 1.6% in 2023 to 1.8%.

Loans beyond the short term1 to agriculture, stocks as of December 2024

	Italiy (million euros)	2023/2024 (%)	% of total
Machinery and equipment	3.484	-6,9	44,0
Rural building construction	1.999	-8,0	25,2
Rural property purchases	2.438	-4,9	30,8
Total	7.922	-6,6	100,0
North-West	2.269	-7,9	28,6
North-east	2.536	-5,9	32,0
Centre	1.312	-7,5	16,6
South	1.234	-5,7	15,6
Islands	570	-3,8	7,2

[1] Escluse le sofferenze.
Source: elaborazioni CREA su dati Banca d'Italia

ECONOMIC RESULTS OF FARMS

Production and income

Plant production trends

Livestock production trends

Comparison with other EU countries

PRODUCTION AND INCOME

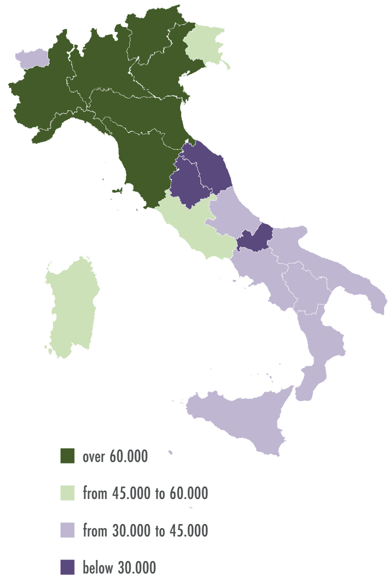
In 2023, Farm Accountancy Data Network (FADN) farms saw an average total revenue of €93,179 which, minus current costs, equalled a value added of €51,596. A farm's net income – the portion of revenues available to the entrepreneur and his family once explicit costs have been subtracted – represented 37% of the total, i.e., 34,693 euros.
The top economic results were obtained in the Northern regions as a result of a greater presence of intensive farms and industrial livestock farms. Lombardy in particular stood out for the high production values achieved. The regions of the Centre-South, in contrast, featuring more extensive agricultural practices, were below the national average.

VALUE ADDED FOR PRODUCTION TRENDS (EUROS)

Cereals	35,087
Horticulture	90,764
Fruit	43,676
Wine	39,851
Olives	31,594

Dairy Cattle	143,458
Sheep & Goats	52,434
Mixed cattle	44,518
Granivores	162,319
Mixed livestock	48,244

Value added by region, 2023



Source: FADN

Structural data and main economic results per region for medium-sized farms 2023

	UAA ha	LU no.	WU no.	FWU no.	Farm revenue euros	Current costs euros	Multi-year costs euros	Distributed income euros	Net Income in euros
Abruzzo	21.6	10.5	1.5	1.1	61,331	24,403	5,020	10,291	23,610
Alto Adige	13.3	7.9	2.1	1.4	128,479	42,673	18,536	20,252	47,324
Basilicata	27.8	7.9	1.5	1.1	58,103	24,461	5,460	10,180	21,967
Calabria	10.5	2.8	1.5	0.9	42,522	10,727	3,438	11,470	19,060
Campania	11.2	10.7	1.4	0.9	62,111	27,437	3,736	10,150	22,248
Emilia Romagna	21.3	23.6	1.7	1.2	142,048	67,692	6,814	18,000	50,065
Friuli Venezia Giulia	22.4	18.3	1.4	1.2	99,343	48,763	9,630	11,176	38,562
Lazio	22.6	12.0	1.5	1.0	86,520	35,619	7,908	14,800	31,556
Liguria	9.9	3.2	1.6	1.2	98,237	30,743	4,748	13,039	54,046
Lombardy	34.8	84.9	1.8	1.4	272,188	151,780	9,856	24,472	83,499
Marche	21.0	6.1	1.1	1.0	48,073	21,865	4,021	6,629	17,840
Molise	20.3	11.4	1.0	0.9	42,757	19,786	4,267	5,678	14,973
Piedmont	27.3	31.6	1.5	1.4	143,998	68,484	8,447	12,534	57,418
Apulia	15.1	3.3	1.3	0.8	64,242	26,894	4,937	12,728	19,956
Sardinia	46.1	21.8	1.3	1.1	76,647	31,055	5,041	9,640	35,796
Sicily	17.7	6.3	1.2	0.7	50,789	18,743	3,445	9,918	21,967
Tuscany	25.3	7.1	1.8	1.3	108,211	42,308	8,674	17,997	42,193
Trentino	12.5	13.4	1.6	1.3	109,729	40,659	14,809	14,935	66,360
Umbria	22.1	14.6	1.1	0.9	61,268	32,271	5,847	9,914	17,789
Aosta Valley	43.6	21.0	1.7	1.4	65,197	27,757	11,533	11,129	29,782
Veneto	16.6	19.1	1.4	1.1	122,785	56,534	8,605	14,658	46,314
Italy	**20.8**	**16.1**	**1.4**	**1.0**	**93,179**	**41,583**	**6,322**	**13,123**	**34,693**

Source: FADN

Structural and economic indicators by region, 2023

	REVENUES/ha euros	REVENUES/LU euros	REVENUES/ WU euros	NR/FWU euros	NR/REVENUES (%)	NR/ha euros	NR/LU euros
Abruzzo	2,837	5,865	41,854	20,941	38	1,092	2,258
Alto Adige	9,640	16,246	61,723	33,736	37	3,551	5,984
Basilicata	2,089	7,334	38,776	20,797	38	790	2,773
Calabria	4,066	14,982	28,610	20,431	45	1,823	6,716
Campania	5,529	5,800	43,774	23,503	36	1,980	2,078
Emilia Romagna	6,664	6,018	84,374	40,244	35	2,349	2,121
Friuli Venezia Giulia	4,443	5,442	70,548	31,111	39	1,725	2,112
Lazio	3,836	7,216	59,284	31,703	36	1,399	2,632
Liguria	9,905	30,891	60,188	45,912	55	5,450	16,995
Lombardy	7,831	3,207	155,194	59,579	31	2,402	984
Marche	2,284	7,860	45,597	18,124	37	848	2,917
Molise	2,110	3,761	41,035	16,157	35	739	1,317
Piedmont	5,284	4,553	93,825	42,472	40	2,107	1,815
Apulia	4,253	19,683	47,613	25,287	31	1,321	6,114
Sardegna	1,664	3,515	58,818	33,122	47	777	1,641
Sicily	2,864	8,067	43,653	29,680	43	1,239	3,489
Tuscany	4,278	15,223	60,546	31,448	39	1,668	5,936
Trentino	8,757	8,207	67,823	52,142	60	5,296	4,963
Umbria	2,776	4,193	58,151	20,679	29	806	1,218
Aosta Valley	1,494	3,105	38,478	21,132	46	683	1,418
Veneto	7,383	6,429	87,439	41,061	38	2,785	2,425
Italy	**4,489**	**5,786**	**64,785**	**33,224**	**37**	**1,672**	**2,154**

Source: FADN

PLANT PRODUCTION TRENDS

Among the main plant systems, farms specializing in horticulture, characterized by limited surface areas (4 ha of UAA) but a large labour force (2.6 WU), stand out for their top economic performance. In contrast, cereal farms, despite having large surface areas (32.2 ha of UAA) recorded decidedly less impressive results. Fruit and wine crops showed similar economic results: the profitability of the average farm was just over 27,000 euros, while when related to the land factor it was around 3,000 euros. The olive sector, in contrast, recorded the most modest of performances: the average farm income did not even reach 20,000 euros.

LIVESTOCK PRODUCTION TRENDS

In the livestock sector, farms specializing in granivores stood out for their particularly impressive economic results, mainly due to the management of large farms (371 LU on average per farm) and intensive farms (on average 15 LU/HA). Top economic performance was also recorded by the dairy cattle sector. The economic results of farms specializing in mixed cattle, milk and meat, generally of a more extensive type, were decidedly more modest (on average 1.1 LU/HA) as were those of farms specializing in sheep and goat breeding, also mainly extensive (on average 0.7 LU/HA). However, sheep and goat farms were the most efficient in terms of the ratio between income and revenues: 49%.

Structural and main economic results for TEO, medium-sized farms 2023

	UAA ha	LU no.	WU no.	FWU no.	Farm revenue in euros	Current costs in euros	Multi-year costs in euros	Distributed income in euros	Net Income in euros
Cereals	32.2		1.0	0.9	70,808	35,721	4,847	8,312	22,726
Horticulture	4.0		2.6	1.3	153,327	62,563	5,405	30,848	53,700
Fruit	8.1		1.4	0.9	64,987	21,312	5,768	12,702	27,531
Wine	9.1		1.2	0.9	59,910	20,059	5,646	9,897	27,350
Olive oil	11.8		1.3	0.8	44,140	12,546	3,569	10,606	19,868
Dairy Cattle	36.5	90.8	2.1	1.6	299,818	156,360	17,181	24,051	107,017
Sheep and Goats	51.0	37.0	1.5	1.2	84,883	32,449	7,009	9,920	41,242
Mixed cattle	43.8	49.5	1.4	1.2	107,746	63,227	7,850	10,576	31,686
Granivores	24.0	371.4	2.4	1.6	457,103	294,784	14,130	32,532	113,703
Chicken breeders	30.2	54.3	1.6	1.3	118,161	69,917	7,267	12,205	30,509
Mixed: crops and livestock	30.1	20.7	1.6	1.2	92,403	43,879	8,256	13,727	30,526

Source: FADN

Structural and economic indicators for TEO, 2023

		REVENUES/ha euros	REVENUES/LU euros	REVENUES/ WU euros	RN/FWU euros	NR/REVENUES %	NR/ha euros	NR/LU euros
TEO Vegetables	Cereals	2,200		70,771	24,546	32	706	
	Horticulture	37,875		58,482	41,627	35	13,265	
	Fruit	8,040		45,846	29,141	42	3,406	
	Wine	6,578		50,043	30,508	46	3,003	
	Olives	3,750		34,973	24,427	45	1,688	
TEO Livestock	Dairy Cattle	8,222	3,301	139,599	65,529	36	2,935	1,178
	Sheep and Goats	1,663	2,295	58,371	33,584	49	808	1,115
	Mixed cattle	2,461	2,177	77,893	25,853	29	724	640
	Granivores	19,067	1,231	186,638	70,850	25	4,743	306
	Chicken breeders	3,912	2,177	74,151	23,567	26	1,010	562
Mixed: crops and livestock		3,073	4,466	56,307	24,428	33	1,015	1,475

Source: FADN

COMPARISON WITH OTHER EU COUNTRIES

For each production sector, the economic results of the production factors recorded over the last three years are compared below (FADN data averages: 2021-2022-2023), with farms in other EU countries and the most advanced agriculture, while being aware of the great differences that exist with regard to the production factors and agro-climatic contexts. Italian farms in the livestock sector recorded excellent economic performances in line with those obtained by the MS from the most developed agriculture. In particular, the nation's farms specializing in the breeding of mixed cattle for the profitability of family work and LU and those with a granivorous and sheep and goat orientation for profitability in ALU. Dairy farms arrived in third place for the profitability of family work, preceded by Denmark and Spain.

Farms specializing in cereal crops: average farm results in euros (2021-2023)

	PL/ha	PL/ULT	RN/ha	RN/ULF
Bulgaria	2,047	208,448	239	39,595
Denmark	1,207	73,239	290	82,869
France	2,105	300,409	435	91,561
Germany	1,543	158,165	395	44,721
Ireland	1,720	167,192	305	47,088
Italy	**2,155**	**202,370**	**881**	**98,499**
Poland	1,799	62,513	910	33,645
Portugal	1,321	30,075	541	13,195
United Kingdom	1,061	25,032	659	18,372
Romania	1,005	53,772	426	43,604
Spain	776	59,419	346	30,180

Source: CREA calculations based on FADN database

Farms specialising in horticulture: average farm results in euros (2021-2023)

	PL/ha	PL/ULT	RN/ha	RN/ULF
Denmark	25,112	148,812	1,647	115,169
France	26,917	81,071	4,487	41,846
Germany	48,323	110,162	6,388	65,056
Greece	21,945	27,737	5,992	15,740
Italy	**31,701**	**65,429**	**12,238**	**46,374**
Netherlands	104,432	193,650	19,214	192,734
Poland	9,763	23,242	3,102	11,296
Portugal	13,425	32,452	4,756	21,249
Romania	7,187	8,947	2,593	4,028
Spain	25,785	48,202	7,893	53,410

Source: CREA calculations based on FADN database

In the plant sector, the economic results of our agriculture was affected by its modest structural endowment, in terms of UAA and work units, which reduced its ability to compete internationally. However, domestic fruit and wine farms still ranked first in terms of land profitability, while vegetable and cereal farms ranked second, the former preceded by Dutch farms and the latter by Polish farms.

Farms specialising in fruit-growing: average company results in euros (2021-2023)

	PL/ha	PL/ULT	RN/ha	RN/ULF
France	7,565	64,964	1,509	36,874
Germany	14,540	67,506	1,803	33,149
Greece	5,191	26,197	2,369	16,737
Italy	**6,520**	**44,173**	**3,076**	**31,413**
Poland	3,148	14,304	1,315	7,528
Portugal	4,008	27,744	2,251	26,857
Romania	4,035	14,268	2,031	10,931
Spain	4,156	42,704	1,689	40,886

Source: CREA calculations based on FADN database

Farms specialising in viticulture: average farm results in euros (2021-2023)

	PL/ha	PL/ULT	RN/ha	RN/ULF
France	10,924	110,115	2,819	59,296
Germany	12,340	73,391	3,938	37,671
Greece	4,217	22,904	1,747	11,990
Italy	**7,563**	**57,514**	**4,186**	**41,389**
Portugal	4,434	30,665	2,369	24,339
Romania	3,884	24,199	1,921	30,680
Spain	2,203	34,643	947	24,740

Source: CREA calculations based on FADN database

Farms specialising in olive-growing: average farm results in euros (2021-2023)

	PL/ha	PL/ULT	RN/ha	RN/ULF
Greece	3,929	21,746	2,079	14,009
Italy	**2,741**	**28,774**	**1,738**	**25,311**
Portugal	577	23,953	554	28,639
Spain	2,074	38,943	1,085	33,906

Source: CREA calculations based on FADN database

Farms specialising in dairy cattle: average company results in euros (2021-2023)

	PL/ha	PL/UBA	PL/ULT	RN/ha	RN/UBA	RN/ULF
Denmark	8,115	4,629	390,429	1,544	881	253,334
France	3,068	2,710	157,993	638	564	41,548
Germany	4,838	3,516	190,168	1,021	742	63,610
Ireland	4,825	2,236	178,172	1,573	729	72,818
Italy	**8,465**	**3,303**	**157,204**	**3,112**	**1,214**	**77,561**
Netherlands	9,211	3,962	285,672	1,996	858	70,752
Poland	3,411	2,548	46,729	1,374	1,027	19,872
Romania	2,176	2,144	17,562	672	662	6,806
Spain	9,687	3,527	170,199	3,648	1,328	96,941

Source: CREA calculations based on FADN database

Farms specializing in mixed cattle: average farm results in euros (2021-2023)

	PL/ha	PL/UBA	PL/ULT	RN/ha	RN/UBA	RN/ULF
France	1,134	1,127	92,352	275	273	24,655
Germany	2,203	2,049	113,728	370	344	22,638
Greece	2,691	661	24,331	1,192	293	13,194
Ireland	1,282	1,057	48,310	440	363	17,161
Italy	**1,821**	**1,742**	**67,672**	**856**	**819**	**36,412**
Netherlands	7,542	1,514	139,458	751	151	15,549
Poland	1,456	1,495	19,274	522	535	7,015
Portugal	506	870	25,575	418	717	24,310
Romania	1,683	1,560	24,873	565	523	11,878
Spain	1,124	1,370	58,009	412	502	24,733

Source: CREA calculations based on FADN database

Farms specialising in granivores: average company results in euros (2021-2023)

	PL/ha	PL/UBA	PL/ULT	RN/ha	RN/UBA	RN/ULF
Denmark	11,292	1,904	437,388	1,264	213	223,868
France	10,547	1,372	283,450	1,509	196	60,193
Germany	7,562	2,124	306,936	1,149	323	78,243
Italy	**16,334**	**874**	**176,824**	**6,159**	**330**	**92,145**
Netherlands	131,172	1,750	657,929	21,635	289	179,305
Poland	13,861	2,265	168,772	3,196	522	63,982
Portugal	25,264	817	89,626	2,710	88	16,522
Romania	12,867	1,414	57,720	2,901	319	45,942
Spain	18,078	936	202,861	5,213	270	150,438

Source: CREA calculations based on FADN database

Farms specialising in sheep and goats: average company results in euros (2021-2023)

	PL/ha	PL/UBA	PL/ULT	RN/ha	RN/UBA	RN/ULF
France	1,336	2,335	80,153	286	500	20,759
Germany	807	2,049	58,045	331	842	31,173
Greece	2,571	1,658	33,964	1,251	807	19,814
Ireland	817	887	35,040	334	362	14,651
Italy	**1,291**	**1,997**	**53,348**	**777**	**1,202**	**36,655**
Portugal	429	890	15,104	386	801	14,816
Romania	1,689	1,381	27,222	607	496	13,740
Spain	1,123	1,602	60,205	493	704	36,713

Source: CREA calculations based on FADN database

FOOD INDUSTRY

Production, personnel and added value

Companies and personnel

Value of the agri-food system

PRODUCTION, PERSONNEL AND ADDED VALUE

The Food, Beverage, and Tobacco industry plays a key role in the national manufacturing sector. In 2024, it accounted for 11.6% of value added (in current values) and 12.9% of employment (in AWU). Compared to 2023, the number of personnel increased by 3.9%, to reach 458,000, while value added grew by 3.5%, to reach €37.9 billion. According to the latest available data for 2023, production accounted for 15.2% of the current value of manufacturing production (at basic prices), reaching €191.9 billion.
According to ISTAT data referring to 2023, the food industry products which have the greatest impact on the production sold are those of the meat processing and storage (20.5% approx.), bakery products (about 18%), other food products (18% circular) and dairy products (16%, approximately). In the beverage industry, wine was the product which achieved the largest share of the production value (around 56%).

IMPACT OF THE FOOD, BEVERAGE AND TOBACCO INDUSTRY ON MANUFACTURING ACTIVITIES

15.2% of production value	**191.9** billion euros
12.9% of personnel	**458,000** units
11.6% of value added	**37.9** billion euros

COMPANIES AND PERSONNEL

According to data from InfoCamere-Movimprese, in 2024, the Italian food and beverage industry had 58,316 active companies. They represented 13.3% of the companies belonging to the entire manufacturing sector.

Companies in the food sector represented the most important part of the aggregate, with 54,557 active companies, accounting for around 94% of the total. In 2024, there was a reduction in the birth rate (given by the ratio of new registrations to registered companies) of 2.3% compared to the previous year, with a balance between active and discontinued companies of -1,478 units. With reference to regional distribution, it is to be noted that around 52% of active companies are located in five regions: Sicily (13.0%), Campania (12.7%), Lombardy (9.9%), Apulia (8.3%) and Emilia- Romagna (7.7%).

The beverage sector consisted of decidedly fewer production units than those of the food sector: in 2024 there were 3,759 active companies. The beverage sector also recorded negative values in the year under review: the balance between new registered and discontinued companies was -104 units and the birth rate fell by 2.3%. At a territorial level, just over 60% of companies in the beverage sector were located in six regions: Campania (12.2%), Apulia (10.5%), Sicily (10.9%), Veneto (9.6%), Piedmont (8.9%) and Lombardy (8.2%).

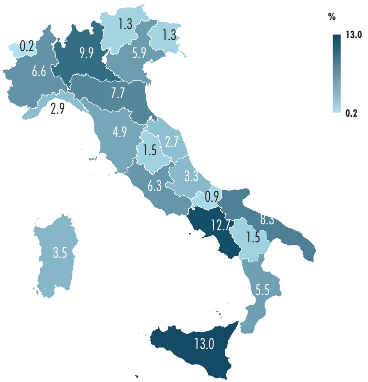
ISTAT data on personnel, relating to 2023, showed that the food and beverage industry employed 467,918 personnel, equal to 12.1% of the manufacturing industry. In particular, the food industry was employing 426,640 workers with an average number per company that stood at 9, lower than the average of the manufacturing sector of 10.7. Looking at the breakdown by food industry sector, the greatest impact as regards personnel was in the production of bakery and starchy products, which represented 38.5% of personnel and recorded an average size of 5.6 personnel per company, followed at a distance by meat processing and preservation with 15.1% of personnel but with an average number of 19.7 personnel per company.

The beverage industry included 41,278 personnel with an average number of 12.6 personnel per company. The greatest impact in terms of personnel was represented by the wine industry with 44.7%, and an average per company of 11.9.

The average size of companies in the food and beverage industry showed a marked regional variability: enterprises in Calabria had an average size of 3.9 personnel each, while the same figure for those in Trento was

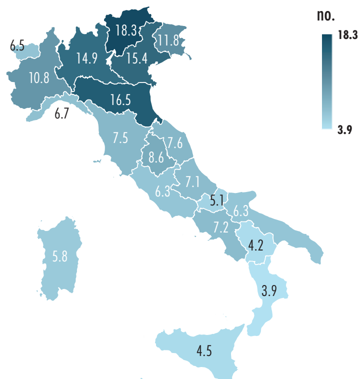
18.3.
With regard to the regional distribution of personnel, 57.3% of food industry personnel were located in the North, while 29.4% of them were located in the South and on the Islands. As for the beverage industry, there was a greater concentration in the North with 67.9% of personnel, while the South and the Islands accounted for 21.5% of all personnel. However, the specialization index, measured at a regional level through the impact of companies in the food and beverage industry on the manufacturing sector compared to the national average, showed a greater specialization of the regions in the South and on the Islands than those in the North.

Food and beverage companies by region (impact on Italy), 2024



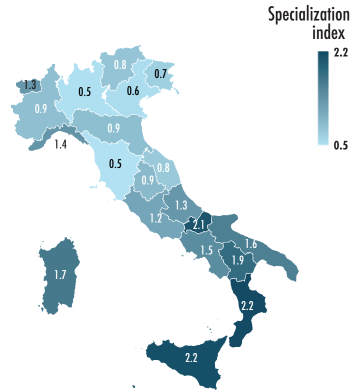
Source: InfoCamere - Movimprese

Employees per company in the food and beverage industry (no.) 2023



Source: ISTAT

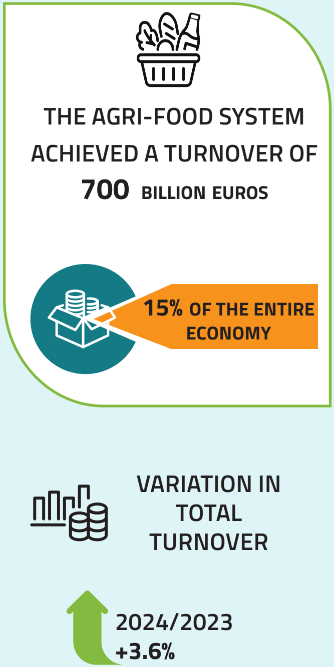
Food and Beverage Industry Specialization by Number of Companies, 2024



Source: InfoCamere -Movimprese

VALUE OF THE AGRI-FOOD SYSTEM

In 2024, the agri-food system as a whole, from agriculture to catering, produced an estimated value in terms of turnover of around 700 billion euros, with a contribution to the entire economy of around 15%. The Food and Beverage industry, with just under €200 billion in estimated turnover, accounts for 28.3% of this value; along with Agriculture, which produced an estimated value of around 81 billion in products sold, they represented around 40% of the overall agri-food system. Wholesale and retail trade together produced 48% of the entire agri-food system, with an estimated value of approximately 160 billion and 176 billion euros, respectively; finally, Catering, with just under 83 billion euros, accounted for the remaining 12%.



Value chain composition of the agri-food system (%), 2024

Source: ISTAT

ITALY/EU COMPARISON

UAA

Farms by UAA class

Production and added value

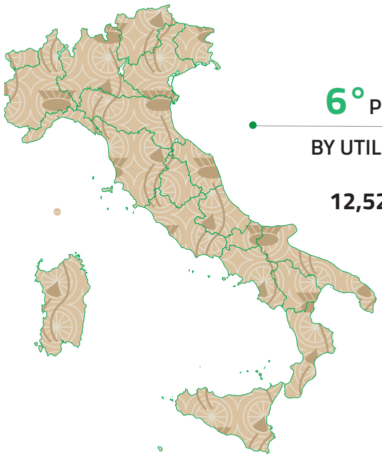
Plant production

Livestock production

Intermediate consumption

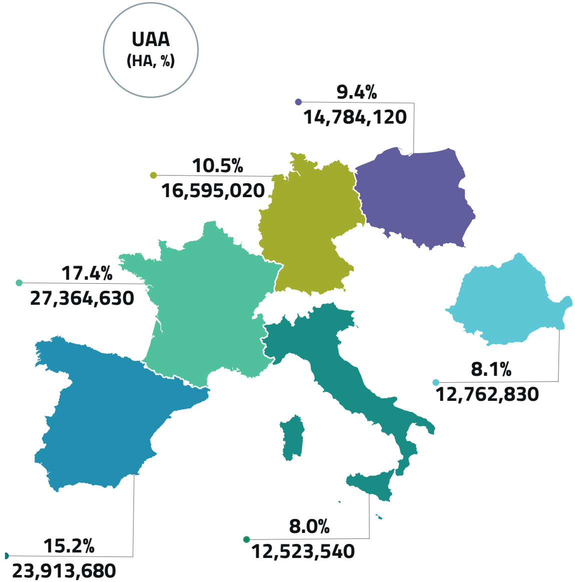
Work and employment

Food and beverage industry



ITALY
OCCUPIES
6° PLACE IN THE EU-27

BY UTILIZED AGRICULTURAL AREA WITH **12,523,540** HECTARES **(8%)**

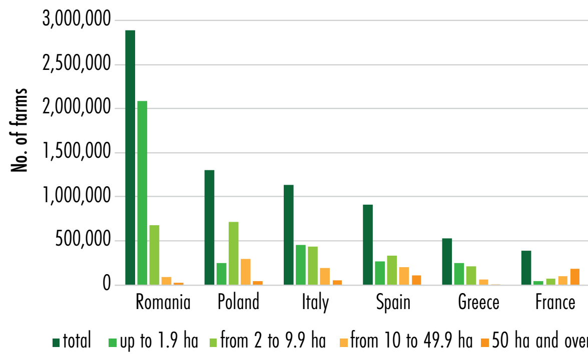


Source: Eurostat, 2020

FARMS BY UAA CLASS

ITALY
OCCUPIES
3° PLACE IN THE UE-27
BY NUMBER OF FARMS

Farms by overall dimension, 2020



Source: Eurostat

1,133,020

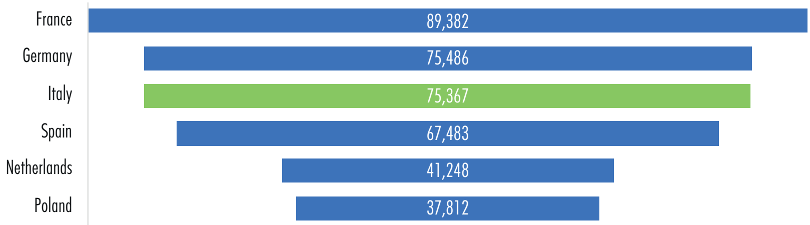
FARMS

l'80% REPRESENTED BY PRODUCTION FACILITIES BELOW **10** UAA HECTARES

PRODUCTION AND ADDED VALUE

75,367 MILLION EUROS

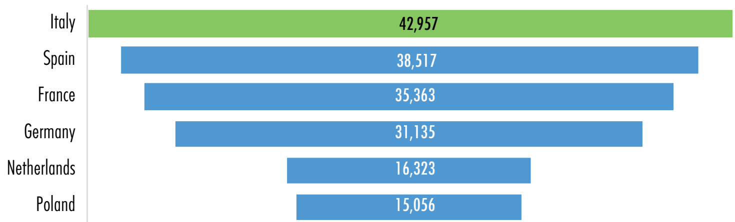
Production in agriculture (current million euros), 2024



Source: Eurostat

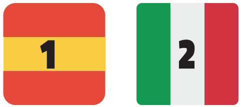
42,957 MILLION EUROS

Added value in agriculture (current million euros), 2024



Source: Eurostat

PLANT PRODUCTION



With **13,993,470** t.
Italian production of fresh vegetables represented **22%** of the EU total, second only to Spain with **15,138,300** t. (24%).

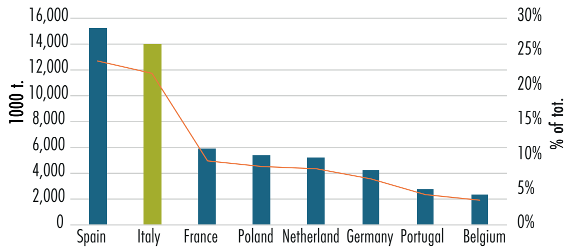
EUROPEAN PRIMACY

Pears	**436,570** tons (24%)
Durum wheat	**3,633,970** tons (46%)
Tomatoes	**6,022,790** tons (36%)
Wine grapes	**6,610,190** tons (32%)

SECOND PLACE

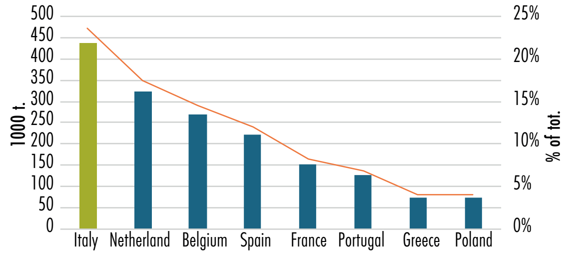
Peaches	**733,220** tons (33%)
Olives for oil	**2,210,280** tons (17%)
Apples	**2,398,540** tons (21%)

Fresh Vegetable Production, 2024



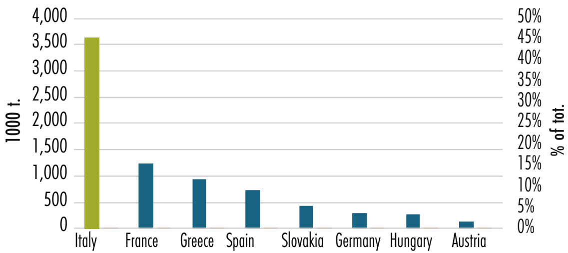
Source: Eurostat

Pear production, 2024



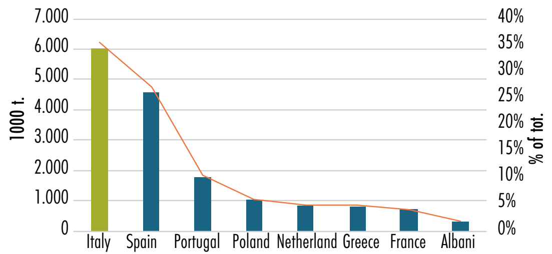
Source: Eurostat

Durum wheat production, 2024



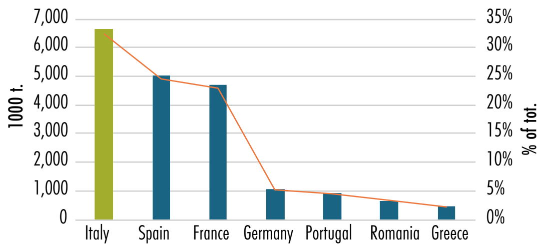
Source: Eurostat

Tomato production, 2024



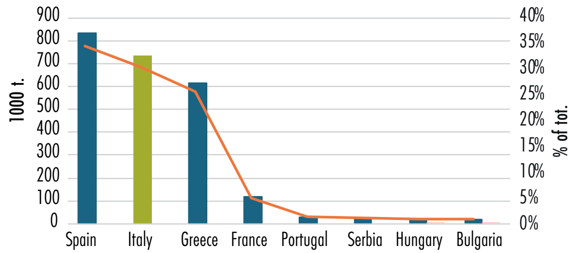
Source: Eurostat

Wine grape production, 2024



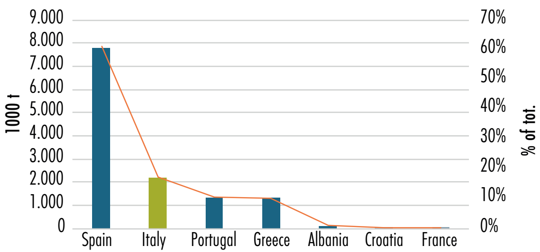
Source: Eurostat

Peach production, 2024



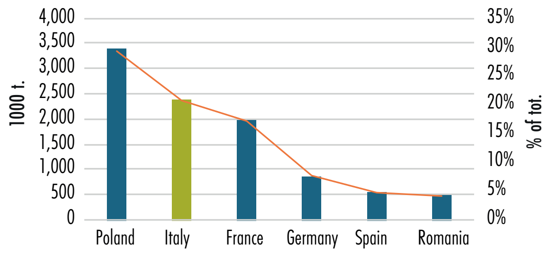
Source: Eurostat

Olive for oil production, 2024



Source: Eurostat

Apple production, 2024



Source: Eurostat

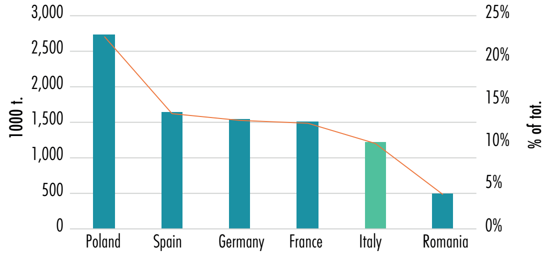
LIVESTOCK PRODUCTION IN ITALY

Poultry production
1,388,270 tons (11%)

Beef production
659,120 tons (10%)

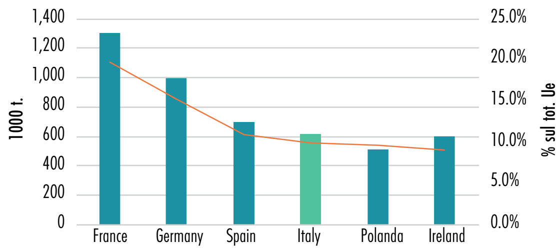
Pork production
1,244,600 tons (6%)

Poultry meat production, 2024



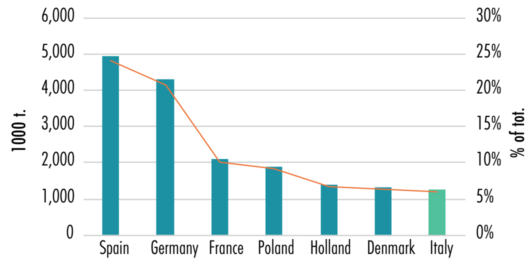
Source: Eurostat

Beef meat production, 2024



Source: Eurostat.

Pork meat production, 2024



Source: Eurostat

DAIRY SECTOR

Cheese

1,358,590 tonnellate

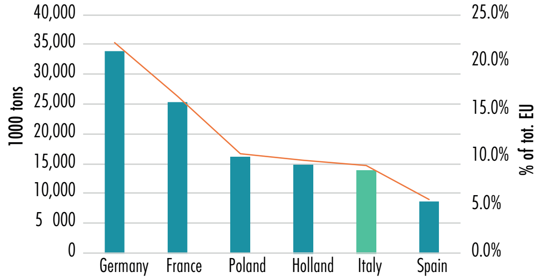
Raw milk

13,973,390 tons

of which cow's milk for drinking:

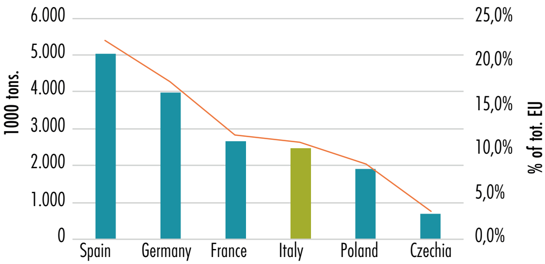
2.,467,420 tons.

Raw milk production, 2024



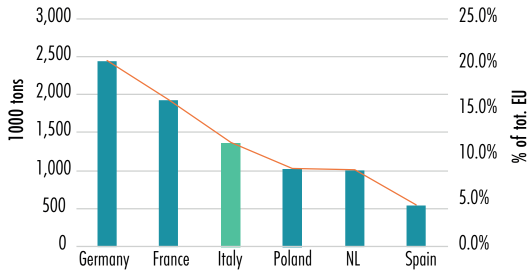
Source: Eurostat

Drinking milk production (cows), 2024



Source: Eurostat

Cheese production, 2024



Source: Eurostat

INTERMEDIATE CONSUMPTION

Within the EU, Italy ranked among the countries with the lowest incidence of intermediate consumption on agricultural production value, preceded only by Spain and Croatia.

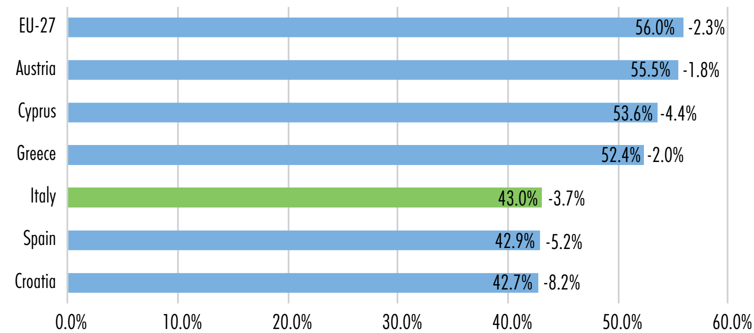
Compared to the EU-27 average of 56%, the impact of intermediate costs in Italy came in at 43.0%, a reduction of almost four percentage points compared to 2023.
This highlighted a greater diversification of Italian production systems compared to our European partners, especially as regards the Central and Northern countries characterized by marked specialization.

IMPACT OF INTERMEDIATE COSTS

EU -27 average
56%

Italian average
43%

Impact of intermediate consumption on agricultural production and variation from 2023



Source: Eurostat

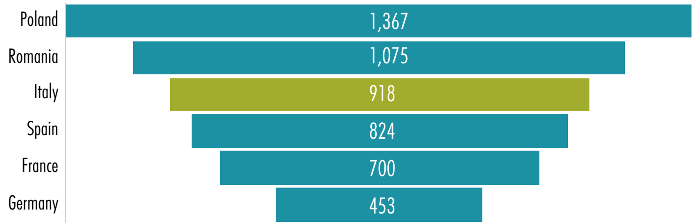
EMPLOYEES IN AGRICULTURE

ITALY IN 3RD PLACE WITH **917,600** UNITS

NON-WAGE WORKERS ITALY **65%**

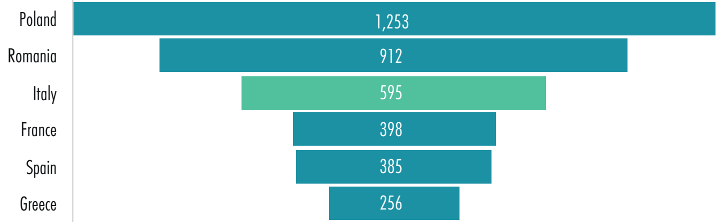
BEHIND POLAND WITH **1,253,600** UNITS (92%) AND ROMANIA WITH **912,000** UNITS (85%)

Work units in agriculture (000), 2024



Source: Eurostat

Agricultural work units – non-wage earners (000), 2024

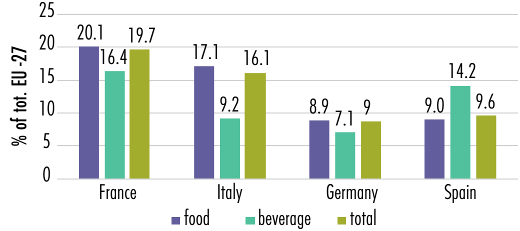


Source: Eurostat

ITALY RANKS AMONG THE TOP **4** EU COUNTRIES BY

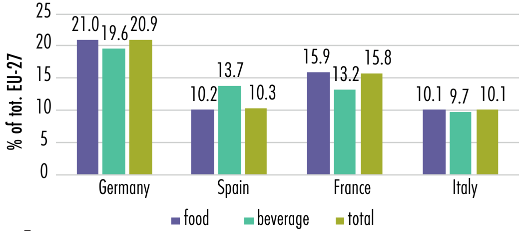
- NUMBER OF COMPANIES
- NUMBER OF EMPLOYEES
- VALUE ADDED

Food and beverage industry – top four EU-27 countries by number of companies, 2023



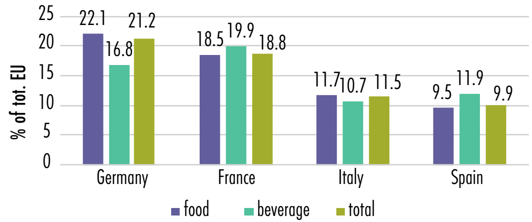
Source: Eurostat

Food and Beverage industry – top four EU-27 countries by number of employees, 2023



Source: Eurostat

Food and Beverage industry – top four EU-27 countries by value added, 2022



Source: Eurostat

DOMESTIC MARKET AND FOREIGN DEMAND

Food consumption

Distribution

Catering

Foreign trade

FOOD CONSUMPTION

In 2024, the consumption of resident Italian households was characterized by slight changes compared to 2023.
The average monthly expenditure at current prices stood at 2,755 euros, remaining substantially unchanged compared to that of 2023, also in real terms. In fact, it increased by only 0.6% against a slightly higher average annual inflation rate (+1%).
Expenditure on food products increased faster than overall expenditure (+1.3%), however its impact on total expenditure grew to a very limited extent (from 19.2% to 19.3%). That said, the expenditure on food consumption was 22.2% in the case of households consisting of a couple with no fewer than three children, while it was much lower in the case of childless couples (13.8%). The adoption of prudent behaviour by 31.1% of Italian households (31.5% in 2023) was confirmed, resulting in a reduction in the variety and/or

AVERAGE MONTHLY SPENDING ON FOOD AND BEVERAGES

533 euro, 19.3%

VS. TOTAL EXPENDITURE

510.53 euros, 17.2% of total expenditure

528.20 euros, 17.4% of total expenditure

535.82 euros, 17.9% of total expenditure

557.77 euros, 25.4% of total expenditure

544.36 euros, 23.5% of total expenditure

AVERAGE MONTHLY EXPENDITURE ON FOOD

Meat
111.28 euros

Bread and cereals
83.01 euros

Vegetables and legumes
69.9 euros

Milk, cheese, eggs
65.44 euros

Fruit
45.42 euros

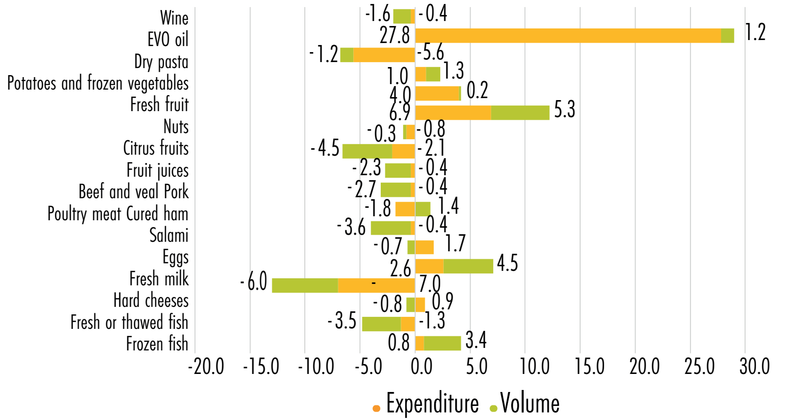
Fish, fishing products
39.77 euros

Sugar and confectionery
23.00 euros

Oils and fats
18.48 euros

quantities of products purchased or also penalizing quality. In particular, most of the products found by the Ismea-NielsenIQ Food Consumption Observatory underwent negative changes, especially in terms of volume, however fewer than those of 2023. With the exception of fruit juices (-4.5%), the products most penalized in terms of volume were those of animal origin such as fresh milk, raw ham, fresh or thawed fish, pork and beef, due to the increasing availability of alternative drinks to milk in the first case and an increase in prices in that of meat. In 2024, spending on fruit rose again, especially on nuts, where there was a considerable increase in volume, alongside eggs and frozen fish, which were cheaper sources of protein than fresh meat or fresh fish. Similarly, some products with a higher transformative content were also characterized by a reversal of the pattern, trend, whereby the volume consumption of ready meals (+1.9%)

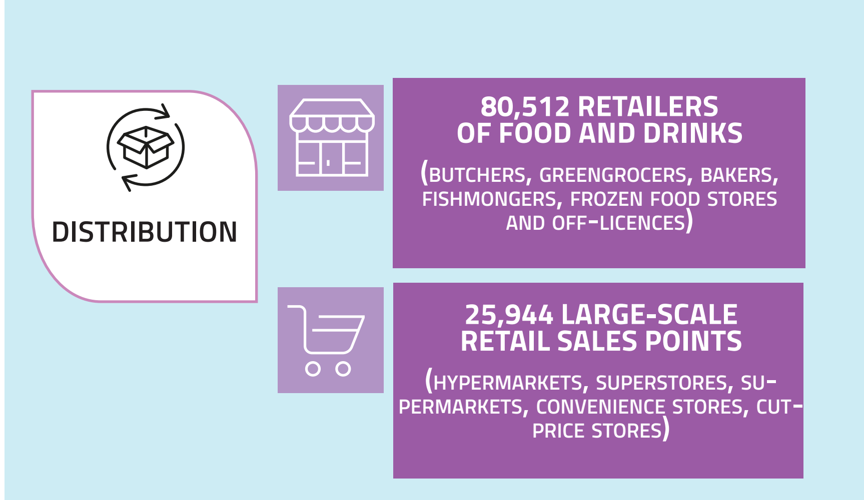
Percentage changes in volumes and expenditure of domestic purchases of some main products, 2024/23



Source: Ismea-NielsenIQ Food Consumption Observatory

and fresh-cut (+2.3%) is increasing again, while the decline of snacks (-2.3%), canned fish (-4.2%), alcoholic beverages (-2%) continues but at lower rates than in 2023. For certain classes of discretionary foods such as sweets, confectionery and chocolate, spreads and sweet desserts saw the first downturns (-0.7%, -2.4%, -2.6% respectively), while sweets and desserts rose (-1.5% compared to 0.9% in 2023). Instead, ice cream consumption remained unchanged.

DISTRIBUTION

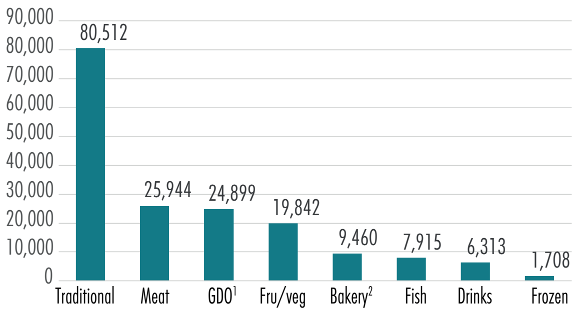


In 2024, traditional food shops, numbering 80,512, suffered a marginal decrease of 2.5% compared to the previous year (MISE data). Retail stores specializing in all categories also decreased, with a greater contraction for fishmongers (-4.4%) and greengrocers (-4.2%), followed by frozen food stores (-4.1%), bakeries (-3.6%), butchers (-3.5%) and beverage stores (-2.1%). Instead, there was a fair increase of 3.3% in modern mass retail outlets, which rose to 25,944 (Federdistribuzione data). Large-scale sales areas became more firmly established in the Central-Northern regions, while in the south proximity shops and cut-price stores became more widespread. Food vendors, numbering 29,688 (-3.9% compared to 2023), were mainly widespread in local markets throughout the national territory.

In 2024, inflation reached zero and total sales of foodstuffs, according to ISTAT data, increased by 0.7% in value against a 1.5% drop in volume and represented around 15% of households' final consumption expenditure.

Despite the growth in e-commerce, foodstuffs, which in 2024 reached 4.6 billion euros and more than 27% of digital buyers (Netcomm data), the value of food sales according to ISTAT data continued to increase significantly for large-scale distribution (+2.1% compared to the previous year) and in a modest percentage for companies operating on small surface areas (+0.1%). Large-scale distribution accounted for more than 80% of Italians' food purchases, with a turnover of around

Retail food shops in fixed locations (no. of units), 2024

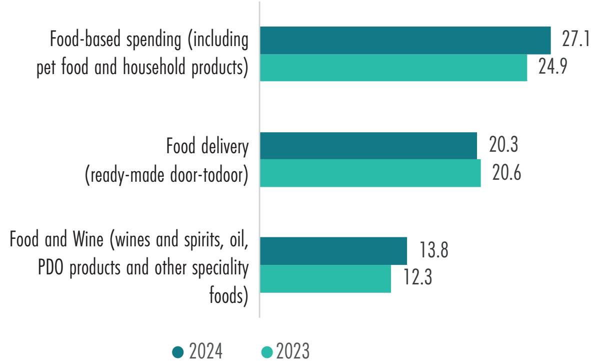


[1] Including hypermarkets, superstores, supermarkets, large self-service stores, discount stores

[2] Including confectionery and sugared almond retailers.

Source: Ministry of Economic Development (MISE) and Federdistribuzione....

E-commerce – % impact of grocery purchases by Food & Grocery category, 2024



Source: NETCOMM, NetRetail 2024.

168 billion euros in 2024, substantially similar to 2023. There were over 447,000 personnel in the sector, of which 65% women and 20% under-30, with another 3 million working in allied industries (Ambrosetti data).

CATERING

According to FIPE (Italian Federation of Public Establishments) surveys, there were 327,046 companies operating in commercial and collective catering as of 31 December 2024, down 1.2% compared to the previous year. The negative trend in the bar channel continued (-3.3% compared to 2023), with a shift towards other more profitable formats (restaurants and canteens). For the purpose of improving the offering and services, in 2024 more than 40% of public establishments in the sector made at least one investment in equipment or technology or for reduction of energy consumption, to the tune of an estimated 2 billion euros.

As for the labour force, the rate of female entrepreneurship and young people under 35 stood at values similar to 2023, respectively 28.8% and 12.3% of the total. There was a slight growth in foreign entrepreneurship, equal to 14.5% (+3.6%), partly due to forms of self-employment of necessity.

The personnel in 2024 numbered 1.5 million (+5.3%), of which over 1.1 million were employees (+6.7%), with an increase of 10% in the over-50s also because of the difficulty in finding personnel, especially qualified, which underlined the sector's need to invest in vocational training. Employment growth, however, was not accompanied by an increase in productivity; down 1% compared to 2023.

Overall, the value added of the sector equalled 59.3 billion, with a growth in real terms of 1.4%. The increase in consumer prices, on average by 3%, did not discourage consumption (96 billion euros, +1.6% in real terms on 2023), with values still below pre-pandemic levels (-6%), but in line with the slowdown in the economic growth of the country. However, there was

CATERING

59.3 billion euros in the value added of the sector

+1.4% compared to 2023

96 billion euros consumption

+1.6%

Companies active in catering services (no.), 2024

	Restaurants and mobile dining	Bars and other similar establishments without a kitchen	Canteens and catering	Total
Piedmont	13,901	8,729	210	22,840
Aosta Valley	688	399	6	1,093
Lombardy	26,711	20,256	742	47,709
Trentino - Alto Adige/Südtirol	3,303	2,201	87	5,591
Veneto	14,173	10,016	220	24,409
Friuli-Venezia Giulia	3,940	2,900	53	6,893
Liguria	7,179	4,865	87	12,131
Emilia-Romagna	14,058	10,026	202	24,286
Tuscany	14,218	7,321	341	21,880
Umbria	2,692	1,821	72	4,585
Marche	4,849	2,542	73	7,464
Lazio	21,663	12,441	427	34,531
Abruzzo	5,251	3,196	84	8,531
Molise	1,036	826	25	1,887
Campania	19,460	13,983	435	33,878
Apulia	12,021	7,773	192	19,986
Basilicata	1,486	1,285	40	2,811
Calabria	6,845	4,167	130	11,142
Sicily	15,889	8,233	291	24,413
Sardinia	6,527	4,687	132	11,346
Italy	**195,890**	**127,667**	**3,849**	**327,406**

Source: FIPE Catering Report, 2023.

a fair increase in the economic performance of catering companies, equal to 0.7% compared to 2023.

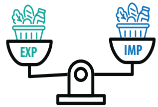
FOREIGN TRADE

In 2024, the growth in value of Italy's agri-food trade continued, with more marked changes than in the previous year. In particular, agri-food exports grew by 8.7%, to reach a record value of 68.5 billion euros. This was over 5 billion more than in 2023 and 9 billion more than in 2022. The increase in agri-food imports, although significant, was clearly more contained than those recorded in 2021/20 and 2022/21, driven by an increase in international commodity prices.

For the second year in a row, there was a marked improvement in the agri-food balance, linked to the growth of agri-food exports at a faster pace than that of imports. The agri-food balance thus returned to being positive after the decline of 2022, conditioned by the aforementioned increase in import prices.

Looking at the geographical distribution of agri-food trade, the EU-27 area concentrated 58.3% of Italy's foreign sales and 71% of its purchases. The impact of this area on Italian agri-food exports decreased by more than one percentage point, while its role in Italian imports grew (+0.8 percentage points). North America was the main non-EU destination area for Italian agri-food, with a growing impact in 2024 thanks to the excellent performance of sales to the USA and Canada for all the main 'Made in Italy' products. On the import side, the impact of other European countries not belonging to the EU, and in particular Russia, decreased in 2024. The impact of Asia as a supplier to Italy also saw a contraction, led by Indonesia, from which purchases of palm oil for non-food use fell.

From a commodity point of view, the growth in exports mainly affected the food industry (+9.9%), but also the primary sector (+6%) and bev-



THE AGRI-FOOD BALANCE 2024

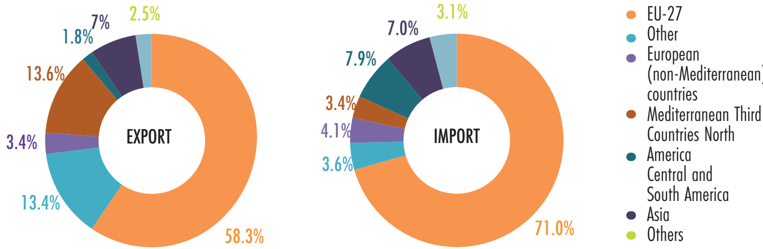
	(billion euros)	% change 2024/23
Exports	68.5	+8.7%
Imports	67.2	+5.1%
Balance	1.2	

erages (+5.2%). For imports, the growth in the primary sector and the food industry was around 6-8%, while for beverages, the increase was 0.4%.

The growth in the value of exports was across the board, affecting all the main products.

Cocoa-based confectionery products was the first export item in 2024, with around 3 billion euros, thanks to a net increase in value (+18%). The performance on foreign markets of biscuit and pastry products was excellent, increasing their exports by more than 10%, both in value and quantity. Italy's export of extra virgin olive oil grew in value by 45.3% compared to 2023 and for imports the increase was 30.5%, against significantly smaller increases in traded volumes. The increase in prices on international markets linked to the decline in production at a global level had an impact.

Italy's trade by geographical areas (%), 2024



Source: CREA calculations based on ISTAT data.

Main products of agri-food trade in Italy

EXPORTS	2024 value (billion euros)	Var. % 2024/23
Cocoa-based confectionery products	2,99	+18,0%
Tomato preserves and peeled tomatoes	2,97	+3,8%
Pasta, not egg, nor filled	2,95	+3,8%
Biscuits and pastries	2,73	+13,7%
Extra virgin olive oil	2,49	+45,3%
IMPORTS	**2024 value (billion euros)**	**Var. % 2024/23**
Processed fish	3,09	+4,6%
Raw coffee	2,54	+26,7%
Extra virgin olive oil	2,46	+30,5%
Cocoa-based confectionery products	1,96	+55,9%
Crustaceans and molluscs, frozen	1,87	+1,3%

Source: CREA calculations based on ISTAT data.

Exports of agri-food products Made in Italy*, 2024

	2024	% change 2023/2024	
	million euros	Current values	Quantity
Cereals	10.1	-10.0	-12.6
Fresh fruit	3,256.5	8.3	6.3
Fresh vegetables	1,604.3	-1.9	6.9
Horticultural products	1,015.1	7.8	10.0
AGRICULTURAL "MADE IN ITALY"	**5,885.9**	**5.2**	**7.0**
Rice	903.9	0.5	9.0
Processed tomatoes	3,393.2	4.2	6.4
Fruit juices and cider	831.2	11.4	-2.0
Other vegetables or fruit prep. or cons.	1,948.9	5.1	-0.3
Cured meats	2,483.6	8.8	12.6
Cheese	3,396.9	8.9	9.2
Olive oil	3,084.3	43.2	7.3
Packaged wine	7,943.7	6.1	6.0
Bulk wine	400.0	-1.7	-10.1
Vinegar	364.5	16.1	13.8
Mineral water	883.3	9.0	3.2
Essences	232.6	9.7	17.7
Other processed products	2,145.3	11.5	10.0
PROCESSED MADE IN ITALY	**28,011.4**	**10.0**	**4.7**
Pasta	4,267.7	5.1	9.3
Bakery products	4,416.0	13.4	11.5
Other cereal derivatives	439.5	5.6	10.7
Cocoa-based confectionery products	2,988.0	18.0	4.8
Ice cream	387.8	10.8	19.5
Coffee	2,450.5	8.3	0.8
Spirits and liqueurs	1,529.1	1.9	2.4
"MADE IN ITALY" IN THE FOOD INDUSTRY	**16,478.6**	**9.7**	**8.6**
TOTAL "MADE IN ITALY" PRODUCTS	**50,375.9**	**9.3**	**6.1**

* The sectors in this table consist of products Made in Italy: a subset of agri-food products, with a stable positive balance and/or which are known to recall our country from the point of viewof image.
Source: CREA calculations from ISTAT data

Processed fish were, once again in 2024, the first item of imports, with a value of 3.1 billion euros. This was followed by raw coffee, olive oil and cocoa products, with significant increases conditioned by the aforementioned price rises on international markets. In 2024, products Made in Italy were worth more than 50 billion euros, equal to 73.6% of Italy's agri-food exports. This share had grown by a percentage point compared to 2023, thanks to the greater increase in exports of products Made in Italy (+9.3%) compared to agri-food as a whole (+8.7%).

By classifying products Made in Italy on the basis of the degree of transformation, it was possible to distinguish three aggregates: Agricultural, Processed, and from the Food Industry. The value of exports of agricultural products Made in Italy represented 11.7% of total exports of Made in Italy agri-food, standing at around 5.9 billion euros (+5.2% compared to 2023). Processed products Made in Italy, thanks to a 10% increase, reached 28 billion euros in 2024, equal to 55.6% of Made in Italy agri-food. Within this aggregate, the upturns in cheese sales, increased by around 9%, were confirmed. Exports of packaged wine exceeded 7.9 billion euros thanks to an increase of 6%, both in value and quantity. The 'Made in Italy' food industry showed an increase in exports of 9.7%, to reach almost 16.5 billion euros. This growth was mainly driven by higher exports of bakery products (+13.4%) and, as already highlighted, cocoa-based confectionery products.

FOOD AND FOOD CULTURE

Organic farming

Designated products

Traditional agri-food Products

Holiday farms and food and wine tourism

Food waste

ORGANIC FARMING

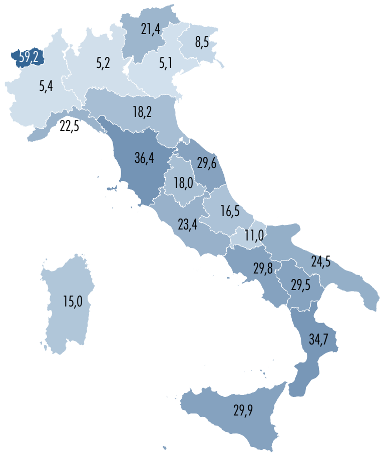
In 2024, the growth of organic farming in Italy continued. The UAA using the organic method recorded an increase of 58,600 hectares, thus reaching over 2.5 million hectares, equal to 20.2% of the national UAA. As a consequence, the road towards the European target of 25% UAA for our country continued, albeit at a lower growth rate (+2.4% from 2023) than the levels achieved in previous years: +4.5% between 2022-2023 and +7.5% between 2021-2022.

Together with the Autonomous Province of Bolzano, there were a total of seven regions that in December 2024 exceeded the incidence threshold of 25% of regional UAA (Aosta Valley, Tuscany, Marche, Campania, Basilicata, Calabria and Sicily), while another two (Lazio and Apulia) came close to this goal.

The growth of organic UAA was

ITALIAN ORGANIC UAA 2024 OVER **2.5** MILLION HECTARES, **+2.4%** COMPARED TO 2023

ORGANIC UAA **20.2%** OF THE TOTAL **+0.4%** OVER 2023



7 REGIONS PLUS THE A.P. OF BOLZANO EXCEEDED THE 25% THRESHOLD

Aosta Valley	59,2%
Tuscany	36,4%
Calabria	34,7%
Sicily	29,9%
Campania	29,8%
Marche	29,6%
Basilicata	29,5%
Bolzano	29,1%

2 REGIONS CAME CLOSE TO THE 25% THRESHOLD:

Apulia	24,5%
Lazio	23,4%

Organic area by region, 2024

	ORGANIC UAA [1]				Impact on total UAA [2]
	ha	%	% change 2024/23	medium farms (ha)	%
Piedmont	49,690	2.0	-13.7	18.2	5.4
Aosta Valley	37,086	1.5	1.754.3	74.8	59.2
Lombardy	51,027	2.1	-5.1	27.5	5.2
Liguria	9,548	0.4	22.1	20.9	22.5
Trentino - Alto Adige/Südtirol	66,846	2.7	31.2	26.6	21.4
Veneto	41,052	1.7	-8.7	17.9	5.1
Friuli-Venezia Giulia	19,067	0.8	-11.3	22.5	8.5
Emilia-Romagna	192,650	7.8	0.3	35.7	18.5
Tuscany	237,038	9.7	-3.0	34.2	36.4
Umbria	54,350	2.2	-6.8	27.9	18.0
Marche	134,533	5.5	4.9	34.2	29.6
Lazio	150,220	6.1	-13.3	28.6	23.4
Abruzzo	67,899	2.8	-3.8	31.1	16.5
Molise	20,444	0.8	-1.8	29.5	11.0
Campania	150,012	6.1	45.8	16.9	29.8
Apulia	318,461	13.0	2.4	29.4	24.5
Basilicata	141,249	5.8	6.9	37.6	29.5
Calabria	186,521	7.6	-4.6	19.0	34.7
Sicily	402,779	16.4	-2.5	29.8	29.9
Sardinia	184,115	7.5	5.2	69.0	15.0
Italy	**2,514,596**	**107.0**	**2.4**	**28.9**	**20.2**
North	**466,968**	**19.9**	**8.4**	**28.2**	**10.6**
Centre	**576,143**	**24.5**	**-4.6**	**31.9**	**28.1**
South and Islands	**1,471,483**	**62.6**	**3.5**	**28.1**	**24.6**

[1] Organic UAA and in conversion.
[2] Total UAA from 2020 Agriculture Census, ISTAT.
Source: CREA calculations based on SINAB & ISTAT data

47,000 hectares), the highest level of growth in absolute value at national level was achieved. Significant increases in organic UAA also affected the A.P. of Bolzano (+38%, around 16,000 hectares) and Liguria (+22%, almost 2,000 hectares), while for Basilicata, Sardinia, Marche and Apulia the increase in organic UAA was rather limited. The positive figure recorded in these regions was in contrast to a reduction of organic areas in several others; more precisely, Piedmont and Lazio had the highest percentage reductions compared to 2023 (-14% and -13% respectively); vice versa, Sicily and Molise saw the lowest (-3%, -2%).
Over the last year, the dimensions of Italian organic farms were reduced, falling from an average value of 29,300 hectares in 2023 to the 28,900 hectares of 2024.
With reference to the distribution of organic UAA by the main production

Organic surfaces by production orientation, 2024

Production orientation	UAA ha				organic proportion under conv. / Total %	% change UAA 2024/2023		
	in conversion	organic	total	of which in conversion %		in conversion	organic	total
Total arable land	161,326	909,743	1,071,069	15.1	42.6	-13.2	0.1	-2.1
of which:								
Cereals	48,097	261,796	309,892	15.5	12.3	-18.9	-11.7	-12.9
Protein crops, grain legumes	6,671	47,506	54,177	12.3	2.2	23.5	21.6	21.8
Root plants	546	3,473	4,018	13.6	0.2	18.2	2.5	4.4
Industrial crops	4,238	39,567	43,804	9.7	1.7	-32.2	-22.5	-23.6
Fresh vegetables, strawberries, cultivated	7,412	49,676	57,087	13.0	2.3	-19.0	-2.6	-5.1
mushrooms	79,845	441,868	521,713	15.3	20.7	-8.5	12.1	8.4
Forage crops	14,519	65,859	80,377	18.1	3.2	-19.9	-10.2	-12.1
Other arable crops								
Permanent meadows and pastures	215,612	573,401	789,012	27.3	31.4	8.6	8.1	8.2
Total perm. meadows	125,524	444,474	569,999	22.0	22.7	0.4	2.3	1.9
of which:								
Fruit[1]	6,721	29,616	36,338	18.5	1.4	-6.1	-8.6	-8.1
Nuts	15,376	51,411	66,787	23.0	2.7	1.7	5.1	4.3
Citrus	5,638	25,663	31,302	18.0	1.2	-10.5	-3.9	-5.2
Olives	67,810	221,141	288,951	23.5	11.5	6.0	2.5	3.3
Vines	27,674	104,767	132,441	20.9	5.3	-8.0	1.8	-0.4
Other perm. crops	2,305	11,875	14,180	16.3	0.6	-4.4	57.0	42.1
Fallow land								
Total	18,958	65,557	84,516	22.4	3.4	0.8	21.2	15.9
Totale	521,421	1,993,176	2,514,596	20.7	100.0	-1.3	3.4	2.4

[1] Fruit includes "temperate zone fruit", "subtropical zone fruit", "small fruits".
Source: CREA calculations from SINAB data

orientations, the prevalence of UAA intended for arable land was confirmed, as in previous years, (42.6%), slightly down compared to 2023 (-2%).

Benefiting from this reduction were areas devoted to permanent grassland and pastures, which accounted for 31.4% of total organic UAA (up 8 percentage points compared to 2023), and permanent crops (22.7%, +2% from 2023).

Among arable crops, UAA in conversion and maintenance of grain protein and leguminous crops increased (+21.8%) as did root vegetables (+4.4%), while forage crops saw a reduction in areas in conversion (-8.5%), accompanied by those already certified (+12.1%). In the same period, the areas, in conversion and certified, destined for industrial crops (-23.6%), cereals (-12.9%) and the broader category classified as "other arable land" (-12.1%) fell

Organic operators by region, 2024

	Exclusive producers		Producers/ processors		Processors Exclusive		Overall operators[1]	
	no.	% change 2024/23	n.	% change 2024/23	n.	% change 2024/23	n.	% change 2024/23
Piedmont	2.033	-0,3	696	-0,4	586	-1,8	3.377	1,0
Aosta Valley	484	1761,5	12	-7,7	8	0,0	504	600,0
Lombardy	1.316	-8,8	539	-2,2	1.077	-0,8	3.057	-0,8
Liguria	347	17,2	110	1,9	146	-3,9	625	12,2
Trentino-A. A./Südtirol	2.128	-18,2	383	-32,2	505	-18,8	3.035	-20,7
Veneto	1.642	-10,3	653	-3,1	959	-0,3	3.328	-4,5
Friuli-Venezia Giulia	655	-10,3	191	-1,5	195	-1,0	1.052	-6,2
Emilia-Romagna	4.606	-1,0	791	-2,9	1.017	-2,3	6.481	-0,5
Tuscany	4.521	-4,1	2.400	7,7	698	0,1	7.657	-0,2
Umbria	1.518	0,5	433	5,6	179	1,1	2.140	2,0
Marche	3.338	0,4	591	-1,5	268	3,1	4.207	0,5
Lazio	4.514	3,2	738	1,7	481	1,7	5.760	3,3
Abruzzo	1.770	-2,0	413	6,7	297	3,5	2.483	0,1
Molise	616	-3,1	77	2,7	71	0,0	765	-2,2
Campania	8.316	33,2	566	3,1	632	-1,1	9.556	28,6
Apulia	9.363	4,3	1.485	0,8	938	5,2	11.804	4,0
Basilicata	3.601	19,5	156	3,3	114	-1,7	3.872	18,0
Calabria	7.856	-2,9	1.974	1,9	338	-4,8	10.177	-2,0
Sicily	11.219	1,2	2.300	5,6	927	-1,4	14.481	2,0
Sardinia	2.469	10,3	198	1,0	132	2,3	2.799	9,2
Italy	**72.312**	**3,8**	**14.706**	**1,2**	**9.568**	**-0,7**	**97.160**	**3,4**
North	**13.211**	**-3,0**	**3.375**	**-6,7**	**4.493**	**-3,7**	**21.459**	**-2,5**
Centre	**13.891**	**-0,2**	**4.162**	**5,0**	**1.626**	**1,2**	**19.764**	**1,2**
South and Islands	**45.210**	**7,4**	**7.169**	**3,2**	**3.449**	**0,6**	**55.937**	**6,6**

[1] The sum of producers and processors does not correspond to the total no. of operators, which also included importers.

Source: CREA calculations from SINAB data

significantly.
As far as permanent crops are concerned, the areas other than fruit, citrus fruits, olives and vines increased (+42.1%), at least for the already certified component, and, to a lesser extent, those of nuts (+4.3%) and olive (+3.3%), the latter mainly for the component in conversion (+6%). Conversely, the amount of hectares destined to fruit (-8.1%), citrus (-5.2%) and vines in conversion (-8%) decreased, in this case partly offset by the increase in certified UAA (+1.8%).
In 2024, the number of organic operators in Italy was 97,160 units, up by 3,155 units compared to 2023 (+3.4%). Operators were largely represented by exclusive producers (74% of the total operators), the category which developed the most in the last year (+3.8%); to a lesser extent by producers/processors

Amount of organic husbandry by species bred, 2024[1]

	no. heads	% change 2023/22	% of livestock overall	ALU[2]	no. heads	% change 2024/23	% of livestock overall	ALU[2]
	2023				2024			
Cattle	469,345	3.8	8.4	375,476	485,536	3.4	8.5	388,429
Sheep	538,751	-5.7	8.3	80,813	566,096	5.1	8.1	84,914
Swine	54,591	-16.8	0.6	16,377	55,327	1.3	0.7	16,598
Goats	98,828	-7.5	10.1	14,824	105,095	6.3	10.7	15,764
Horses	25,567	13.0	15.5	25,567	29,712	16.2	18.0	29,712
Poultry	6,809,393	10.7	4.3	68,094	5,940,980	-12.8	3.8	59,410
Bees (no. of hives)	217,111	-6.9			216,609	-0.2		

[1] Total livestock (number of animals) from the 7th ISTAT Agriculture Census
[2] Us are estimated on the basis of the number of animals per species, since details are not available
Source: calculations based on SINAB data

(15%), also growing (+1.2%) and exclusive processors (9.8%), a category which saw the number of operators decrease in 2024 (-0.7%).
At a territorial level, the number of operators grew, especially in the Aosta Valley (+600%) and Campania (+28.6%), the two regions which recorded the most significant increase in UAA in the last year, while it decreased by more than 20% in Trentino-Alto Adige despite an increase in UAA of over 30%.
For the organic livestock sector, in 2024 there was an increase in the number of farms for almost all animal species; In particular, for the second year running, double-digit growth in the number of equines was confirmed, while, after the negative results in 2023, the number of goats, sheep and, to a lesser extent, swine was growing again. In contrast, the poultry figures fell (-12.8% compared to 2023), while the number of beehives was almost unchanged (-0.2% from 2023).

AVERAGE ANNUAL ORGANIC CONSUMPTION ITALY 2023
66 EUROS PER CAPITA COMPARED TO 2023

Source FiBL-AMI Survey 2025

Sales of organic food and beverages in Italy and abroad, for a total amount of 10.4 billion euros, grew by 6% in value and volume compared to 2023. The domestic market, in particular, reached a turnover volume of 6.5 billion euros (+5.7% compared to 2023), supported by an increase in domestic consumption (5.2 billion euros, +5.9% from 2023) and OOH consumption (1.3 billion euros, +5%) Sales of Italian organic products in foreign markets also achieved good results with a turnover volume of 3.9 billion euros, 7% more than in 2023.

DESIGNATED PRODUCTS

Agri-food products

Italy was the leader in the EU with 324 registered products, present in every region, and 4 traditional guaranteed (TSG) specialities, including pizza, first courses, and mozzarella. Fruit, vegetables and cereals accounted for the largest number of PDO and PGI products (126), while cheeses achieved the highest production value (60.3%), followed by cured meats (24.8%).

The value of PDO/PGI agri-food products (Qualivita-Ismea 2023 data) was 9.17 billion euros at production, up 3.5%, and almost 18 billion euros at consumption (+3.6%). The sector included 87,212 operators and 182 protection consortia, for a total of 585,543 personnel.

Products with geographical indications represent a point of excellence among Italian agri-food, with an export value which reached 4.67 billion euros (+0.7%), with growth in

PDO PGI BY SECTOR (NO)

Fruit, vegetables and cereals	126
Cheese	57
Olive oil	50
Cured meats	43
Bread and pastries	18
Fresh meat	6
Fish and shellfish	6
Pasta	5
Products of animal origin	5
Balsamic Vinegar	3
Saffron	3
Liquorice	1
Chocolate	1

AGRI-FOOD PRODUCTS 328

PDO 174

PGI 150

TSG 4

WINE: 529

PDO 410

PGI 4

SPIRITS

SPIRITS (GI) 36

Top 10 PDO and PGI agri-food products (million euros)

	Grana Padano DOP	1,885
	Parmigiano Reggiano DOP	1,599
	Prosciutto di Parma DOP	951
	Mozzarella di Bufala Campana DOP	528
	Pecorino romano DOP	494
	Gorgonzola DOP	430
	Prosciutto di San Daniele DOP	385
	Aceto balsamico di Modena IGP	350
	Mortadella Bologna IGP	339
	Pasta di Gragnano IGP	273

Source: Qualivita-ISMEA

Top 10 PDO and PGI wines (million euros)

Prosecco DOP	942
Conegliano Valdobbiadene Prosecco DOP	205
Delle Venezie DOP	177
Asti DOP	123
Amarone della Valpolicella DOP	115
Valpolicella Ripasso DOP	110
Veneto IGP	99
Alto Adige DOP	99
Puglia IGP	92
Barolo DOP	90

Source: Qualivita-ISMEA

value for cheese, pasta and olive oil.

Wine

There were 529 Italian wines with geographical appellations, and their number placed our country first in the EU, ahead of France (442), Spain (148), and Greece (147).

The value of PDO and PGI wines was 11.3 billion euros, equal to 56% of the country's GI basket, driven by a dozen appellations that accounted for more than 50% of all certified wines (Qualivita-Ismea 2023 data). The sector employed 107,175 operators and 135 protection consortia, with a total of 332,506 personnel.

According to Valoritalia estimates, PDO wine production rose to 35.6 million hectolitres in 2024, driven by consumption and business investments, with an estimated value of 17.5 billion euros.

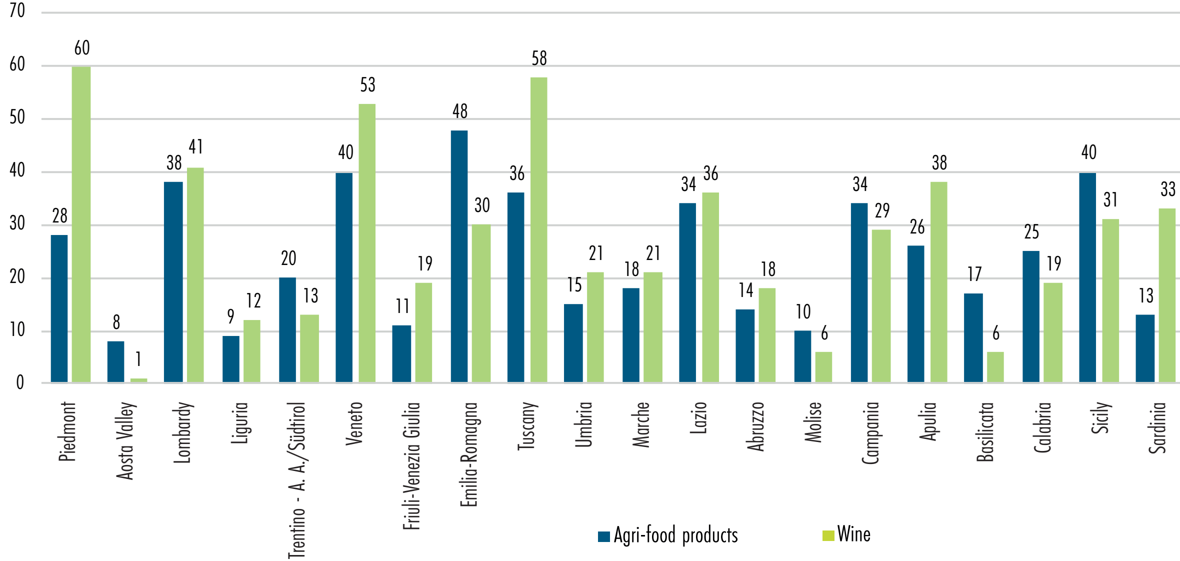
On the export front, appellation wines grew in 2024 by 6.5% in value and 7.6% in volume for PDOs, by 1.3% in value and 2.8% in volume for PGIs, while common wines suffered a marginal decline of 7% in quantity, but with an equal increase in revenues (ISMEA data, 2025). The United States remained the leading destination market for Italian wine, with 24% of total turnover, recording a growth of 10.2% in value and 7% in volume.

Spirits

There were 36 spirit drinks with a geographical appellation (brandy, rum, liqueurs), including 15 fruit spirits and 10 grape spirits.

This sector in Italy, according to EU estimates, is worth €151 million, equal to 1% of the country's GI basket.

PDO and PGI by sector (nos.)

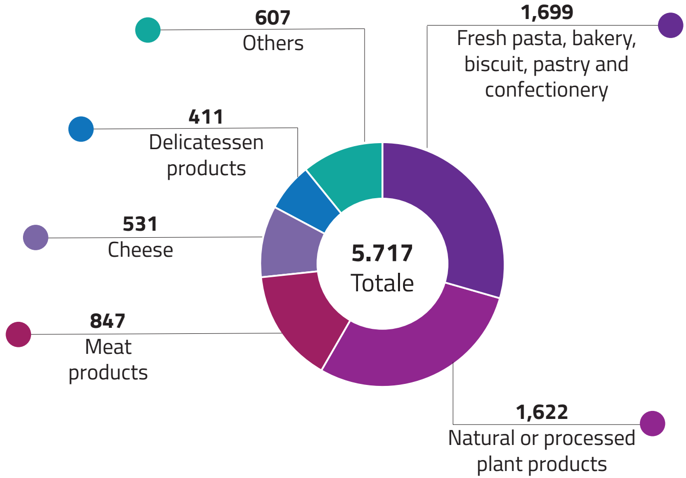


Updated: October 2025.

Source: Qualivita

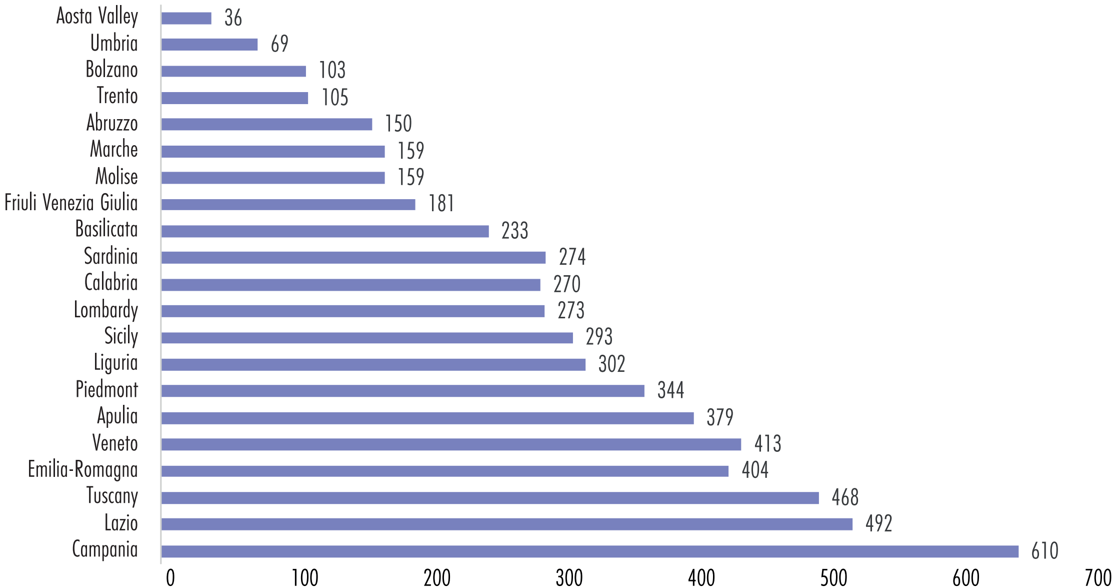
TRADITIONAL AGRI-FOOD PRODUCTS

Traditional Agri-food Products (TAP), an expression of Italy's cultural heritage (Legislative Decree No. 173/98) along with historical, artistic, and architectural assets, numbered 5,717 (+1.4%) according to the 2025 MASAF list, kept up to date annually by the Regions. This treasure trove of traditional specialities enriched the national gastronomic basket, already abounding in appellation products, with food specialities using age-old rules, including recipes, liqueurs, cured meats, jams, fruit and vegetables, and desserts. These are local products that have maintained their methods and flavours over time, the expression of a region committed to preserving a distinct food and wine identity, which consumers typically find at small artisans, taverns, fairs, and village festivals.



The updated list contained 78 more products than in 2024, with a 7% increase for delicatessen products and approximately 2% for fresh pasta, bread, and desserts. Campania, Lazio, and Tuscany remained the regions with the greatest number of specialities, collectively accounting for over a quarter of those listed.

Traditional agri-food products by region (nos.), 2025



Source: 25th revision of the national list of traditional agri-food products, MASAF Decree March 10th, 2025

FARM HOLIDAYS AND FOOD AND WINE TOURISM

In 2023, according to the latest ISTAT data, holiday farms rose in number to 26,129 (+1.1% compared to the previous year), solidifying a trend that had been growing for twenty years. The increase in facilities was seen, in particular, in the regions of the Centre (+2.3%) and the Islands (+1.7%), with stable numbers across the rest of the country. The density of holiday farms throughout the country was confirmed to be high, with 9 structures per 100 km², with higher incidences in the A.P. of Bolzano and in the Tuscany and Umbria regions. Overall, 63.7% of municipalities were hosting at least one holiday farm

In 2023, the number of farm holiday guests increased, amounting to 4.5 million (+11%), 51% of which came from abroad. The current value of holiday farm production, amounting to 1,871 million euros, increased by 15.4% in 2023 and equalled over 71,600 euros per company (ISTAT data). One in two establishments offered catering and one in four tasting activities.

An increasingly widespread phenomenon in Italy was that of food and wine tourism which focused on local productions and appellations as a lever to propose educational and sustainable experiences to rediscover the country's innermost territories. Italian food and wine tourists numbered

26,129
HOLIDAYS

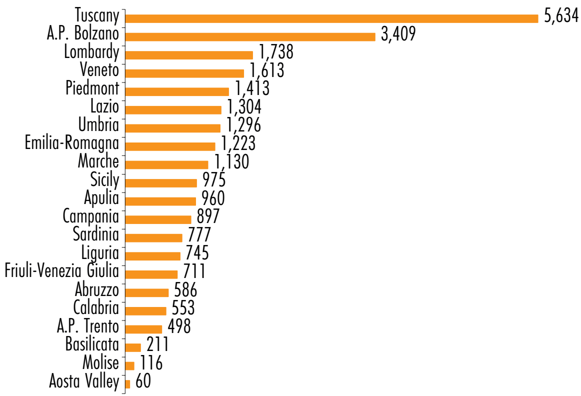
84% were in mountainous and hilly areas

81% offered accommodation

49.8% offered catering

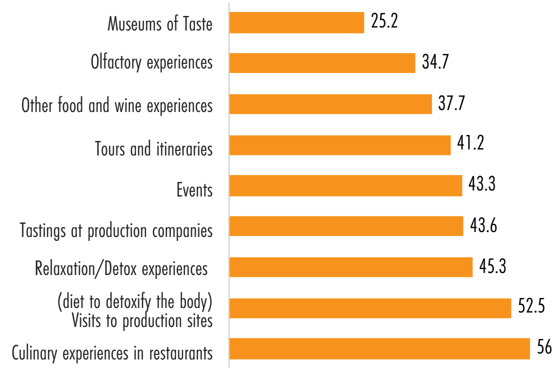
14.5 MILLION EUROS
ITALIAN FOOD AND WINE TOURISTS
40 BILLION EUROS
TURNOVER

Holiday farms by region, 2023



Source: ISTAT

Food and wine experiences indicated as a reason for travel in the last three years (%) - Italian Tourist Survey, year 2024



N.B.: Total >100 as multiple choice possible.
Source: Report on Italian Food and Wine Tourism, 2025

over 14.5 million, who had opted predominantly for domestic destinations, generating a value for the sector of over 40 billion euros.
Food and Wine experiences, according to a survey by the European Travel Commission, represented the second most sought-after activity by European tourists (15.3%), after Natural Landscapes (16.7%). According to the Report on Italian Food and Wine Tourism 2025, 70% of Italian tourists declared, in 2024, to have taken at least one holiday in the last three years whose motivation was first and foremost food; wine was the most representative product for tastings in our country (48.8%), followed by EVO (with 24% of preferences), pizza (22%), pasta (15%) and cheeses (11%).

FOOD WASTE

In 2024, Food Losses and Waste (FLW) throughout the Italian supply chain reached more than 4.5 million tons (+10% compared to 2023), for a value exceeding 14 billion euros (+7.6%). According to estimates by the International Waste Watcher Observatory, the value of FLW reached 20 billion euros if the consumption of land, water and energy necessary for their production, processing and distribution was also included.
According to the latest ISTAT update on the areas and production of all crops, the production left in the fields in 2024 stood at 1.6 million tons and was equal to 2.9% of total agricultural production. Olives accounted for 34.8% of unharvested production, followed by vegetables in open fields (20.5%) and legumes (14.4%).
Overall, agriculture and processing saw a reduction in losses (-2.2% compared to 2023) in the face of the

FOOD WASTE
FOOD LOSSES AND
WASTE (FLW)

4.5 MILLION TONS
OF AGRI-FOOD PRODUCTS
14.1 MILLION TONS

32 KG OF FOOD ON
AVERAGE
PER CAPITA

28.6% OF FLW OCCURRED IN THE AGRICULTURAL PRODUCTION PHASE

22.3% IN PROCESSING

6.9% IN DISTRIBUTION

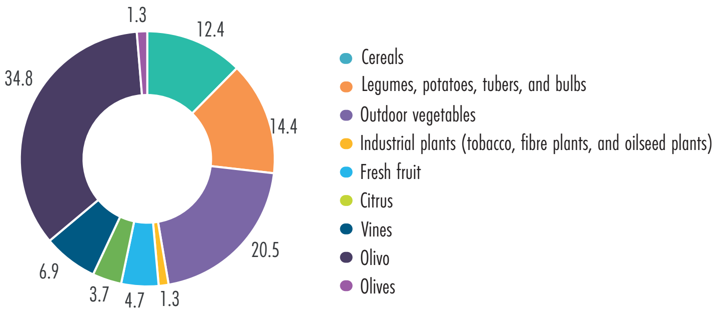
42.2 IN DOMESTIC CONSUMPTION

Source: Waste Watcher International Observatory.

adoption of circular economy practices implemented by companies to valorize surpluses and reduce waste (Food Sustainability Observatory, Polytechnic University of Milan). In contrast, domestic waste and waste in the downstream phases of supply chains (distribution and administration) increased by 13% compared to 2023. In 2024, Italians wasted on average over 32 kg of food at a cost of over 130 euros per capita, corresponding to 617.9 grams of food per week per person; in particular fresh fruit and bread, vegetables and ready-to-eat salads.

As regards the reduction of waste, thanks to the Gadda Law (Legislative Decree no. 166/2016), 93,745 tons of food were recovered for solidarity purposes from large-scale distribution and restaurants in 2024, distributed through 7,645 charitable structures and canteens in favour of over 1,750,000 destitute people (Food Bank Foundation).

Agricultural production left in the field by sector in Italy (%), 2024



Updated September 2025.
Source: ISTAT.

THE ENVIRONMENT

Climate and water availability

Land consumption

Emissions from the agricultural and forestry sector

Forestry

Use of chemicals

CLIMATE AND WATER AVAILABILITY

The year 2024 followed in the wake of previous years with high heat and rainfall anomalies.
At a national level, minimum and maximum temperatures were +1.5 °C above the 1991-2020 climate average; with the greatest anomalies in the first quarter of the year (+ 2.7 °C and +2.3 °C). The warmest month compared to normal was February (+ 3.9°C and +3.5 °C for the minimum and maximum respectively), followed by March, July and August, with thermal anomalies between +2.0 and +2.8 °C. The Centre and South were the most affected.
Only November for the minimums, and May and September for the maximums, were close to normal.
Annual rainfall was 13% higher than normal in Italy (1,072 mm), more concentrated in February (+66%) and March (+63%) and reduced by ⅔

2024 EVEN WARMER

+ 1.5 °C BOTH MINIMUM AND MAXIMUM TEMPERATURES

FEBRUARY THE HOTTEST MONTH

+ 3.9 °C MINIMUM TEMPERATURE
+ 3.5 °C MAXIMUM TEMPERATURE

ANNUAL RAINFALL

13% ABOVE NORMAL

WETTEST MONTHS
FEBRUARY **+66 %**
MARCH **+63 %**

WITH CONTRIBUTIONS EQUAL TO

3-4 TIMES THE CLIMATE VALUE IN

Piedmont	+223%
Lombardy	+201%
Liguria	+160%

WATER AVAILABILITY IN AGRICULTURE

PROLONGED DROUGHT in the South and on the Islands

EXTREME DROUGHT in the first months of the year in Sicily, Sardinia, Calabria and Apulia

EXCESS HUMIDITY in the north for most of the year

EXTREME HUMIDITY in June-July in Lombardy, Piedmont and the Autonomous Province of Trento

EXTREME PRECIPITATION

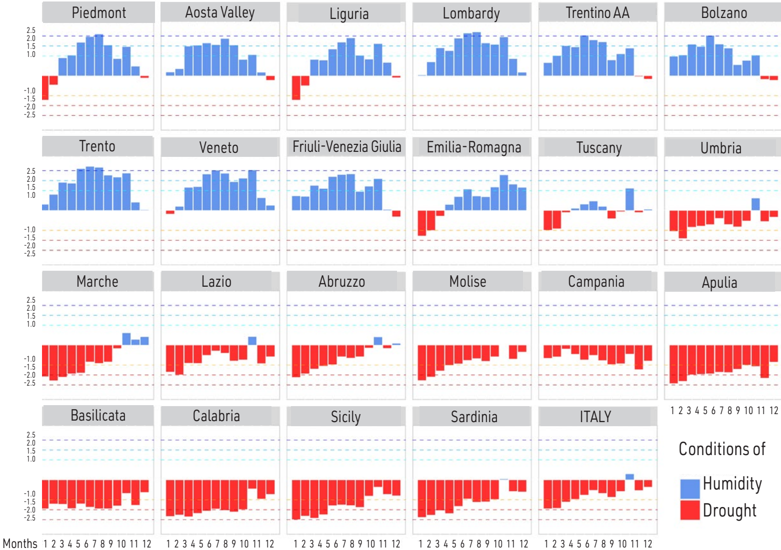
23% of total annual rainfall nationwide

37% in Emilia-Romagna, **36%** in Liguria e Friuli-Venezia Giulia, **35%** in Veneto , **32%** Lombardy in November. The excess of rainfall in the North reached its maximum in March in Piedmont with 298mm (+223%) and in February in Lombardy with 187 mm (+201%). An opposite situation occurred in June in Calabria and Basilicata (around -80%), and in July in Apulia and the major islands (around -70%)

The indicator of water availability in agriculture in 2024 showed the North in almost constant excess humidity, which reached an extreme in June/July in Lombardy and Piedmont. On the contrary, a persistent drought affected the South and the Islands, and to a lesser extent the Centre; the situation in Apulia, Calabria, Sicily and Sardinia was critical, a severe prolonged drought, easing only in the last part of the year.

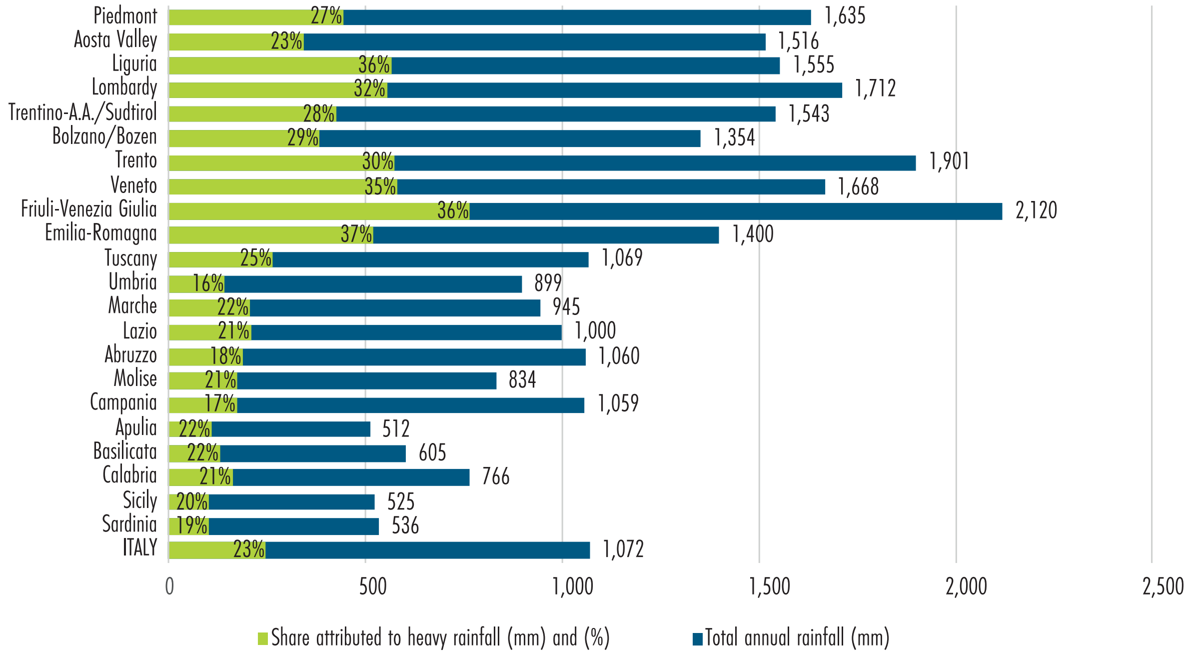
The extreme rainfall index, higher than in 2022, showed that 23% of total annual rainfall nationwide (249 mm) refers to extraordinary events. Once again the North was most heavily affected: Emilia-Romagna with 522mm (37% of the annual total), Friuli-Venezia Giulia and Liguria with respectively 768 mm and 567 mm (36%), Veneto with 582 mm (35%) and Lombardy with 555 mm (32%).

Agricultural Drought Index SPEI-6mesi (Standardized Precipitation Evapotranspiration Index), 2024



Source: Observatory of Agro-meteo-climatology of CREA - Agriculture and Environment (https://doi.org/10.5281/zenodo.13740741)

Heavy Precipitation Index (R95pTOT), 2024



Source: Observatory of Agro-meteo-climatology of CREA - Agriculture and Environment (https://doi.org/10.5281/zenodo.13740741)

LAND CONSUMPTION

Land consumption in Italy showed no sign of ceasing and, in the period between 2022 and 2023, it recorded a new increase, albeit slightly lower than that of the previous year. In these twelve months, 72.5 km^2 of natural territory were lost, equal to around 20 hectares per day.
A rate that was still higher than the average of the decade 2012-2022 and which, despite restorations of just over 8 km^2, brought the net balance of 2023 to 64.4 km^2. In other words, the country continued to irreversibly transform more than 17 hectares per day, consolidating a long-term pattern that has been steadily eroding agricultural land and natural areas since 2006.
Compared to ISPRA data for 2022, in which the average daily consumption was 19.4 hectares, a slight slowdown was observed, but urban planning pressure remained high. A substantial part of the new transformations concerned waterproofed surfaces, which increased by 26 km^2 in 2023. Of these, 13.8 km^2 were converted into permanent uses such as for roads, yards and buildings, i.e. areas intended for infrastructure and stable settlements that it would be difficult to restore to natural soil. In addition, 4.6 km^2 were covered by greenhouses and other structures which, although not included in official consumption classifications, nevertheless contributed to reducing availability of fertile soil.
The 2023 data also showed that land consumption was concentrated in the most accessible land (coastal strips, plains and valley bottoms), but above all in agricultural areas close to large urban centres. In these contexts, more than 80% of the changes involved grassed-over areas, with 2,996 hectares of new consumption in periodic herbaceous and 2,268 hectares in permanent herbaceous.

LAND LOST IN 2023
72.5 KM^2
20 HECTARES PER DAY
365.7 M^2 PER CAPITE

RESTORATION 2023
8 KM^2

USEFUL LAND CONSUMED BY 2023
10.16% OF ITALY'S TERRITORY

From the point of view of land use, almost a third of the transformations directly involved agricultural areas, in particular arable land, where 2,658 hectares of brand-new land consumption were recorded. At the same time, the loss of natural areas in urban environments, crucial for quality of life and climate adaptation, was accentuated.
Overall, the consumed land now covers 7.16% of the national territory, a percentage that rises to 10.16% if considered in relation to the so-called "useful land", i.e., actually available for new settlements.
From a per capita point of view, land consumption continued to grow: since 2006, each inhabitant has seen their "share of land consumed" increase by 17.5 m^2, from around 348 m^2 per capita in 2006 to 365.7 m^2 in 2023. This figure confirms that the expansion of artificial surfaces was not strictly linked to population growth: even in contexts of stable or slightly declining population, per capita land consumption grew, signalling a constant pressure on the territory.
A comparison with 2022 data shows that restorations remained marginal to the overall loss, while irreversible transformations continued to affect both agricultural and natural areas.
The numbers suggest that, without significant changes in land use management and planning, the land will continue to change at a rapid rate, with a gradual increase in artificial surface density and land fragmentation.

EMISSIONS FROM THE AGRICULTURAL AND FORESTRY SECTOR

The EU aims for climate neutrality by 2050 and a reduction in agriculture shows a decline in both farms and UAA.
In particular, agricultural emissions in 2023 increased to 32.2 million emissions of 55% by 2030.
Italy is required to make a cut of 43.7% in the key sectors indicated by the (EU) Effort Sharing Regulation (ESR) – i.e. Transport, Residential Construction, Agriculture, Waste and Industry not included in the ETS - and an uptake by the LULUCF sector (land use, change in land use and forestry) of at least -35.8 Mt CO_2eq by 2030. Regulation (EU) 2024/3012 introduced a certification system for permanent carbon removals to achieve the European LULUCF target of -310 Mt CO_2eq. To achieve this, Italy decided to equip itself with a National Register of Voluntary Carbon Credits for the Agroforestry Sector, managed by CREA (Law of 21 April 2023, no. 41). Agricultural emissions in recent years have remained stable, accounting for around 8% of total national emissions, despite the last national census in tons of CO_2eq compared to 30.9 million tons of CO_2eq in the previous year, mainly due to the increase in N_2O emissions from agricultural soils.

THE AGRICULTURAL SECTOR PRODUCES

32,2 MILLION TONS OF **CO_2eq**

20 MILLION OF METHANE GAS

THE FORESTRY SECTOR ABSORBS

L'**83.5%** OF THE CO_2eq EMITTED

THE REMAINING CO_2eq EMITTED IS ABSORBED BY PERMANENT

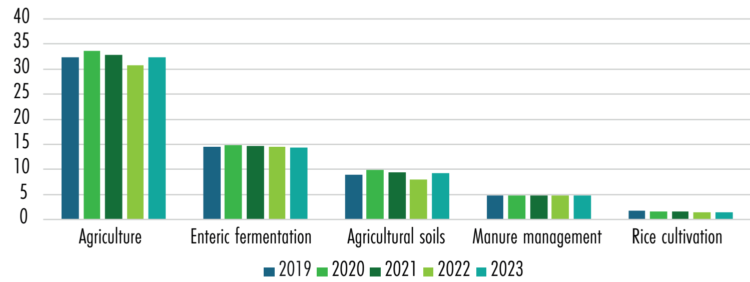
MEADOWS AND PASTURES

As in the previous year, agriculture was confirmed as the second most polluting sector after the energy sector, followed by the industrial production and waste processing sectors.
Methane remains the greenhouse gas that contributes most to emissions with around 20 million tons of CO_2eq, followed by N_2O with around 9 million tons of CO_2eq.

LULUCF

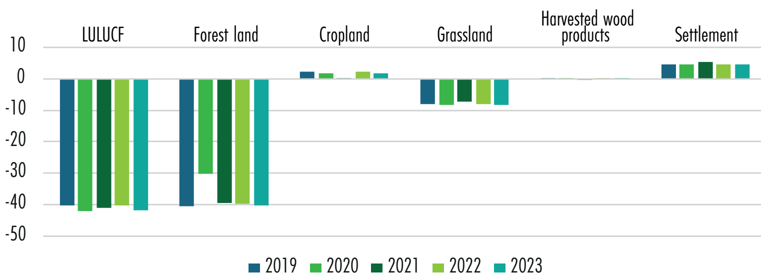
In 2023, the LULUCF sector recorded a marginal increase in its absorption capacity, rising from 40.2 million tons of CO_2eq in 2022 to 41.8 million tons, mainly thanks to an increase in

Emissions from the agricultural sector ($MtCO_2eq$)



Source: National inventory of greenhouse gas emissions.

Emissions from the LULUCF sector ($MtCO_2e$)



Source: National inventory of greenhouse gas emissions.

forest area and an increase in sustainable forest management. The forest category absorbed 83.5% of CO_2eq, thanks to the absorption of living biomass, while the remaining CO_2 was absorbed by the grassland sector.
The most heavily emitting sector remains that relating to the use of urban land (Settlement), which, like last year, emitted into the atmosphere around 4.5 million tons of CO_2eq. The other categories of the LULUCF sector, i.e. agricultural soils, wetlands and harvested wood products, together emit around 1.5 million tons of CO_2eq.

FOREST

Italy's forested surface has been steadily increasing since the Second World War and has tripled over the last hundred years, mainly due to depopulation of mountain and rural areas and the natural recolonization of degraded areas located near urban centres. Over the last twenty years, Italy has distinguished itself at a world level, ranking ninth in terms of forest area expansion, with an average annual increase of around 54,000 hectares (FAO data, 2020). According to the National Forest Inventory and carbon sink data (INFC, 2015), Italian forests – including the "Woodland" and "Other Wooded Lands" categories – cover over 11 million hectares, equal to around 37% of the national territory (Pecchi et al., 2024). This expansion promotes renaturalization and contributes to climate change mitigation; however, it also carries a higher risk of woodland fires due to the accumulation of bio-mass, increased hydrogeological vulnerability and the loss of traditional habitats and landscapes linked to agro-forestry-pastoral activities.

To this information base can now be added the Forest Map of Italy, which provides updated and more detailed data. The data of the "Woodland" class of the inventory (2015) and cartography (2020), at a national level, were respectively equal to 29.6% (8,956,787.00 ha) and 33.4% (10,100,327.43 ha). At a regional level, the highest percentage of the "Woodland" class was present in Tuscany (75.6% and 88.3% respectively), while the lowest was in Apulia (5.9% and 6.1%).

10.1 MILLION HECTARES OF FOREST

WOODLAND INDEX **33,4%**

+ HIGH IN TUSCANY (88%)

+ LOW IN APULIA (6.1%)

52,981 hectares of land affected by fires in 2024

28,768 hectares of forest (-30%)

Area for the category "Forest" and Woodland Index*

	INFC** 2015		CFI*** 2020	
	Surfaces (ha)	Woodland Index (%)	Surfaces (ha)	Woodland Index (%)
Piedmont	869,773	34.3	980,556	38.6
Aosta Valley	99,243	30.5	104,143	32.0
Lombardy	596,836	25.0	677,088	28.4
Liguria	342,793	63.3	394,149	72.8
A.P. Bolzano	339,270	45.9	357,934	48.4
A.P. Trento	373,259	60.1	398,476	64.2
Veneto	411,427	22.4	452,296	24.7
Friuli Venezia Giulia	323,362	40.7	353,846	44.6
Emilia-Romagna	578,852	25.7	633,201	28.1
Tuscany	1,028,665	75.6	1,201,539	88.3
Umbria	383,928	45.4	382,470	45.2
Marche	284,904	30.5	304,414	32.6
Lazio	558,060	32.4	617,869	35.9
Abruzzo	408,616	37.7	418,555	38.7
Molise	150,533	33.8	152,520	34.2
Campania	400,763	29.3	491,572	36.0
Apulia	142,248	5.9	147,618	6.1
Basilicata	286,498	28.5	333,160	33.1
Calabria	492,771	32.4	634,969	41.7
Sicily	284,731	12.4	359,432	15.6
Sardinia	600,255	23.2	704,520	27.3
Italy	**8,956,787**	**29.7**	**10,100,327**	**33.4**

* Percentage ratio of wooded area to administrative area, FAO definition.
** National forest inventory and carbon sinks.
*** Forest Map of Italy.

Source: CREA elaboration on SINFor data

Fires

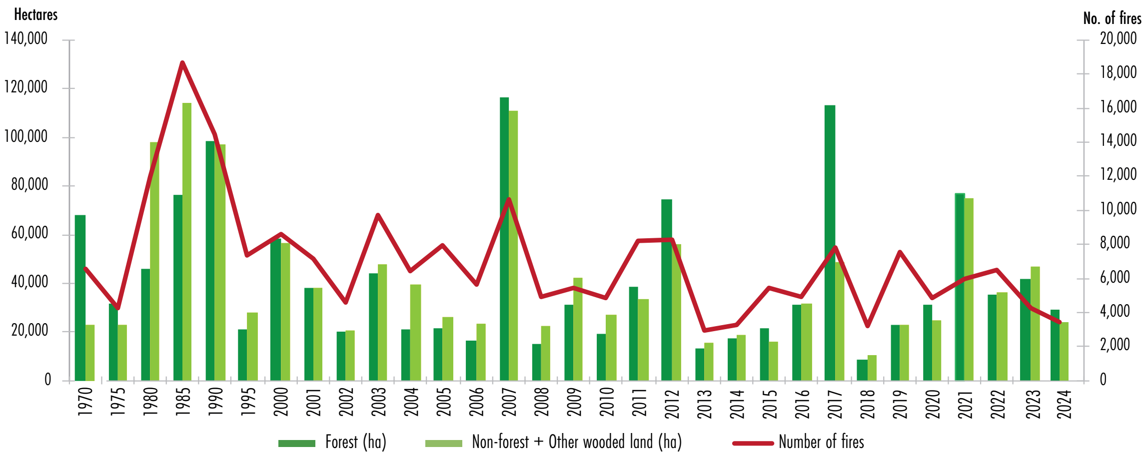
Forest fires are one of the main factors in the degradation of terrestrial ecosystems, with serious environmental, economic and social repercussions. Climate change, through prolonged periods of drought and reduced rainfall, is putting a strain on the structure and resilience of forest ecosystems. In Italy, fires are considered the main threat to the natural and forest heritage. The triggers are many: accidental or malicious human activities, poor management of the territory, abandonment of agro-forestry-pastoral practices and accumulation of necromass.

According to data from the Forest Fire Investigation Unit (NIAB), in 2024, forest fires in Italy affected a total of 52,981 hectares, a reduction of almost 36,000 hectares compared to 2023. The number of events fell from 4,265 to 3,793, while the average area affected by fires was reduced from 20.8 to 13.97 hectares per fire.

The wooded areas involved amounted to 28,768 hectares, equal to around 30% less than the previous year, while the non-wooded areas (including "other wooded lands" and "non-wooded" areas) covered 24,213 hectares, recording a reduction of 49% compared to 2023.

Despite the slight improvement recorded in 2024, it remains necessary to employ an integrated approach combining prevention, forest planning and land management to strengthen the resilience of forest systems.

Area affected by fire and number of fires



Source: CREA elaboration on NIAB data

USE OF CHEMICALS

In 2024, the quantities of fertilizers sold overall increased by 26.2%, with a quantity of 2.4 million tons (Assofertilizzanti data). The largest share of these products was mineral fertilisers (solid and fluid) which, with 1.7 million tons, accounted for more than 71% of total fertilizers. The sale of organic fertilizers for consumption amounted to 289,000 tons (-0.29%), while that of organo-minerals amounted to 228,000 tons (-0.51%); water-soluble products were stable with 168,000 tons.

The weather conditions which affected much of the Italian territory prompted farmers to use biostimulant products, to facilitate an easy recovery of any crops that had suffered strong abiotic stress (e.g. from the weather).

The use of fertilizers in organic farming increased by 4.8 percentage points, thanks to a distributed quantity of 136,025 tons, demonstrating the importance of this type of production in the Italian context.

The actual consumption of all three main nutrients (nitrogen, phosphorus and potassium) was positive. The total use of nutrients, according to Assofertilizzanti, increased from 706,000 to 749,000 tons (+6.9). Nitrogen grew by 4.8%, phosphorus by 11.3% and potassium recorded +4.2%.

In 2023, according to the latest ISTAT available data, there was a reduction in plant protection products and active ingredients for agricultural use in Italy, with a decrease of 9.8% compared to the previous year, to be added to the -11.6% recorded in 2022. The total volume of agro-pharmaceutical products used was 92,815 tons; 10,080 tons less than in the previous year. In the period 2022-2023, consumption of pesticides decreased by more than 23,600 tons. Among the various categories, reduction in fungicides continued (-19.6%); the latter, while maintaining a preponderant share of the entire sector, fell

PATTERN OF CHEMICAL USE

NUTRIENTS (2024)
749,000 t (+6.09%)

NITROGEN
482,000 t (+4.78%)

PHOSPHORUS
168,000 t (+11.26%)

POTASSIUM
99,000 t (+4.21%)

PESTICIDES (2023)
92,817 t (-9.79)

FUNGICIDES
39,477 t (-19.64%)

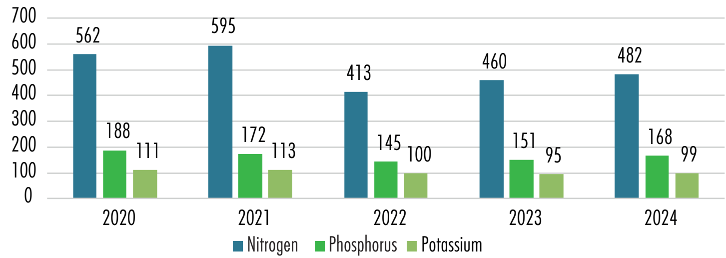
INSECTICIDES, ACARICIDES
25,340 t (+9.93%)

HERBICIDES
17,175 t (+8.87%)

MISCELLANEOUS
10,824 t (-27.5%)

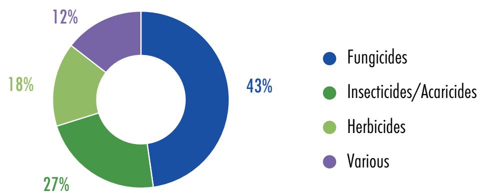
from a quantity of 48% in 2022 to 42% in 2023. In fact, they lost an amount of 9,650 tons – accounting for almost all of the decline seen in the pesticide sector. As for insecticides and acaricides, the increase of 2,290 tons of products distributed generated an overall increase in the category of 9.9%, which meant a contribution of 27% in the entire sector. Herbicide use also grew (+8.9%), with a consequent higher impact (18%). Finally, miscellaneous products showed a negative growth (-4.11%) and together with fungicides defined the contraction of the sector.
The consumption of plant protection products for agricultural use at a national level was mainly concentrated in the regions of Northern Italy, which employed almost 54%; around 18% of national consumption was distributed across Emilia-Romagna, followed by Veneto (14%) and Piedmont (8%). In the Centre, consumption was 14%, while in the South and on the Islands it was 32% (in Apulia distribution was 12%, while in Sicily it was 8%).

Consumption of nutrients in Italy (000 t)



Source: Assofertilizzanti.

Composition of pesticides used (%), 2023



Source: ISTAT.

AGRICULTURAL POLICY

Common Agricultural Policy - framework

CAP Pillar I

CAP Pillar II

Regional expenditure

National policy

Social agriculture

COMMON AGRICULTURAL POLICY - FRAMEWORK

For implementation of the CAP, in 2024, Italy had €4.8 billion available, of which 72% was for direct payments, market-related expenditure and sectoral interventions, with the remainder for rural development (EU share only).
Overall, the budget for our country represented 9% of the EU-27 budget.
The distribution of expenditure by type of intervention within each country highlighted the importance of direct payments in Ireland, Czechia, Denmark and France, where they exceeded 80% of the total (compared to 67% of the EU total), with Italy stopping at 63%. There were many more countries in which rural development was a priority. In Luxembourg, expenditure on the second pillar accounted for 88% of the total (for the EU-27 this expenditure equalled 25% of the total, while Italy stopped at 20%). Italy ranked second (12%), after the Netherlands (15%), among countries where the share allocated to market measures and sectoral interventions was higher, compared to an EU total of 5%. France was confirmed as the main beneficiary of the CAP (with a share of 15.4%) and direct payments (18.3% of total EU spending for this category of expenditure). Italy maintained fourth position in overall terms (9.6%), but slipped to fifth place as a recipient of direct payments (9% of the total) surpassed by Poland; it was confirmed as the first recipient of resources allocated to market measures and sectoral interventions (24.2%), while it fell back to fourth place, preceded by Spain, Germany and Poland, as the most important recipient of resources for rural development (7.6%), ahead of France, which held the first position in 2023. Finally, our country was the first recipient of resources for Recovery (16.9%).

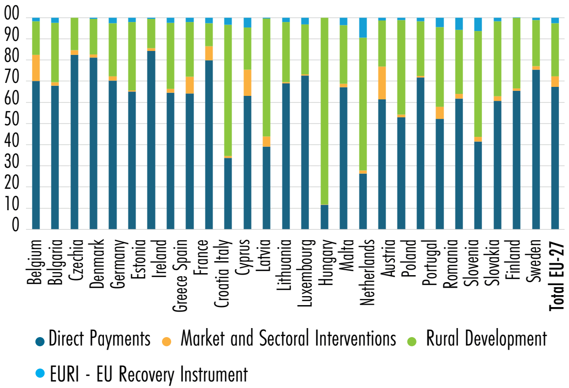
CAP RESOURCES FOR ITALY IN 2024

4.8 BILLION EUROS

9%
OF EU-27 AGRICULTURAL EXPENDITURE

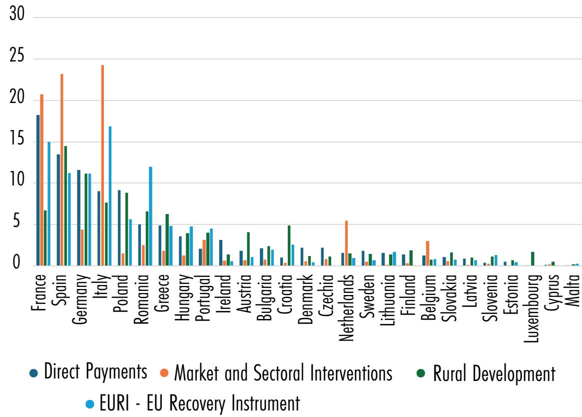
72,1% PILLAR I OF THE CAP
27,9% PILLAR II OF THE CAP

Percentage distribution of CAP payments by spending category in each EU-27 State, 2024



Source: CREA calculations based on European Commission data

Percentage distribution of payments by CAP expenditure category among EU-27 States, 2024



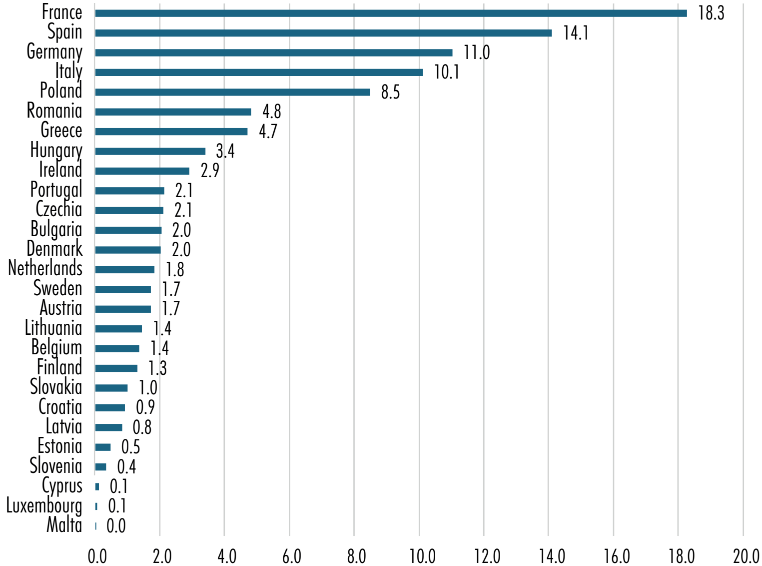
Source: CREA calculations based on European Commission data

CAP PILLAR I

France, with just under €7.5 billion, was the largest beneficiary of the EAGF, i.e., Pillar I spending, followed by Spain (around €5.8 billion) and Germany (€4.5 billion). Italy maintained fourth place with resources of €4.1 billion (10.1% of the EU-27 total), a marginal decrease compared to 2023.
A good 81.5% of CAP Pillar I resources received by Italy came in the form of direct payments, almost en-

ITALY MAINTAINED FOURTH PLACE IN THE EU FOR EAGF EXPENDITURE WITH A SHARE OF **10.1%**, EQUAL TO **4.1** BILLION EUROS

Percentage distribution of EAGF by EU-27 Member State, 2024



Source: CREA calculations based on European Commission data

tirely attributable to those covered by the CAP Strategic Plan (NSP). Basic income support for sustainability represented the largest EAGF expenditure item (38.5%), accounting for just under half (47%) of direct payment expenditure.

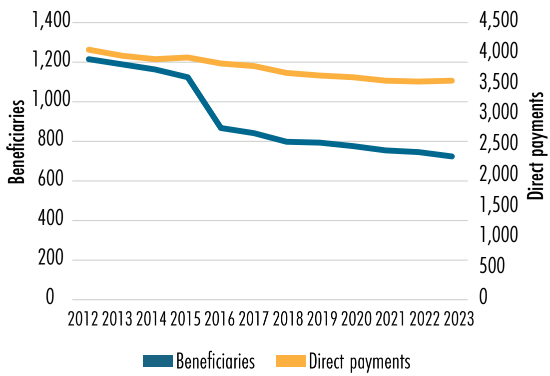
Payments under climate and environmental schemes (20.5%) and coupled income support (11.9%) followed in importance. Sectoral interventions under the NSP accounted for 9.6% of EAGF expenditure, almost entirely related to the wine, fruit and vegetable sectors. Italy confirmed its importance in the EU landscape, accounting for just under 38% of the EU's spending on sectoral interventions. In particular, Italy accounted for 90% of spending on interventions in the olive oil sector, 34% of spending on interventions in the sector of fruit and vegetables, 39% of that for the wine sector and around 53% of expenditure for the other sectors which, in the case of

EAGF expenditure by type of intervention, 2024

	Italy		EU-27		Italy/EU
	million euros	%	million euros	%	%
Sectoral interventions under NSPs	**397.2**	**9.6**	**1,053.5**	**2.6**	**37.7**
- Olive oil and table olive sector	34.4	0.8	38.8	0.1	88.7
- Fruit and vegetable sector	140.7	3.4	413.6	1.0	34.0
- Wine sector	212.2	5.1	538.2	1.3	39.4
- Beekeeping products sector	4.6	0.1	52.7	0.1	8.7
- Other sectors	5.3	0.1	10.1	0.0	52.7
Market-related expenses outside NSPs	**267.9**	**6.5**	**1,689.1**	**4.1**	**15.9**
- Olive oil	-0.1	0.0	-0.1	0.0	100.0
- Fruit and vegetables	175.8	4.3	735.0	1.8	23.9
- Wine products	43.3	1.0	379.7	0.9	11.4
- Beekeeping companies	0.0	0.0	0.0	0.0	0.0
- Programmes intended for schools	19.6	0.5	182.3	0.4	10.7
- Other	29.4	0.7	392.2	1.0	7.5
Direct payments under NSPs	**3,328.8**	**80.6**	**36,904.3**	**90.4**	**9.0**
- Basic income support for sustainability	1,590.5	38.5	18,966.8	46.5	8.4
- Recreational support compl. to income for	341.8	8.3	4,012.4	9.8	8.5
subsistence.	57.0	1.4	700.9	1.7	8.1
- Subst. compl. income for young farmers	847.0	20.5	8,586.8	21.0	9.9
- Climate and environmental schemes	492.5	11.9	4,412.9	10.8	11.2
- Coupled income support	0.0	0.0	224.5	0.6	0.0
- Other	35.3	0.9	523.0	1.3	6.8
Direct payments outside NSPs	**100.1**	**2.4**	**640.1**	**1.6**	**15.6**
Administrative expenditure, corrections and other	**4,129.2**	**100.0**	**40,810.0**	**100,0**	**10.1**

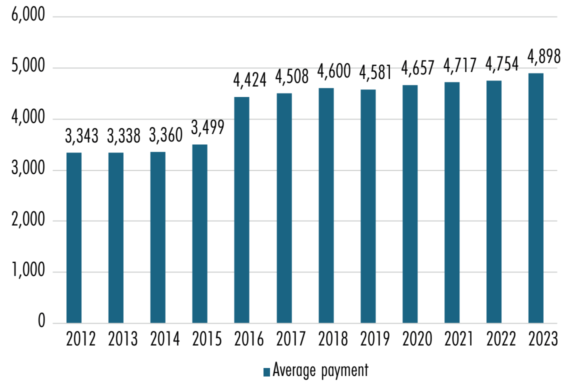
Source: CREA calculations based on European Commission data

Beneficiaries (000) and direct payments (million euros) in Italy, 2012-2023



Source: CREA calculations based on European Commission data

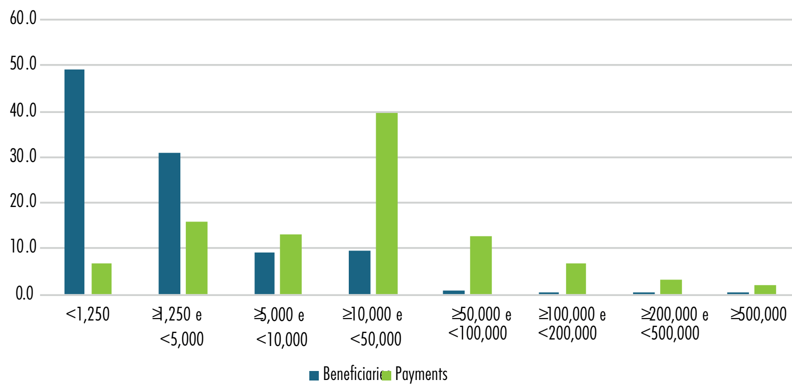
Average payment in Italy (euros/company), 2012-2023



Source: CREA calculations based on European Commission data

Italy, applied exclusively to the potato sector.
In 2023, companies in Italy that received direct payments numbered just under 726,000 units, 12.4% of the beneficiaries of the EU-27. These data refer to payments for the financial year 2022, the last year of the CAP programming period which had begun in 2015. During this period of time, there was a contraction in the number of beneficiaries (-16.4%) more marked than that recorded by the amount of direct payments (-7.4%), resulting in an increase in the average payment per company (+10.7%) .
In the EU-27, there was a simi-

Percentage distribution of direct payments and beneficiaries by payment class in Italy, 2023



Source: CREA calculations based on European Commission data

lar trend in terms of the number of beneficiaries (-11.2%), while the amount of direct payments was broadly stable (+0.5%), resulting in a more significant increase in the average payment per farm (+13.2%), which stood at 6,541 euros.

Half of Italian beneficiaries (49.3%) received less than €1,250 in direct payments in the year, concentrating just under 7% of the financial resources. Another 30.7% of beneficiaries, those with an annual payment between 1,250 and 5,000 euros, accounted for approximately 16% of the payments. Conversely, those who received more than 50,000 euros represented only 1.2% of the beneficiaries but accounted for approximately 25% of the payments. Over the years, the CAP led to a decline in the number of beneficiaries of small amounts. In particular, with the 2015-2022 programming period, the share of beneficiaries receiving amounts less than €500 drastically decreased, while the share of beneficiaries receiving larger payment categories increased. In terms of the amount of resources, payments between €10,000 and €50,000 came to represent almost 40% of the total.

CAP PILLAR II

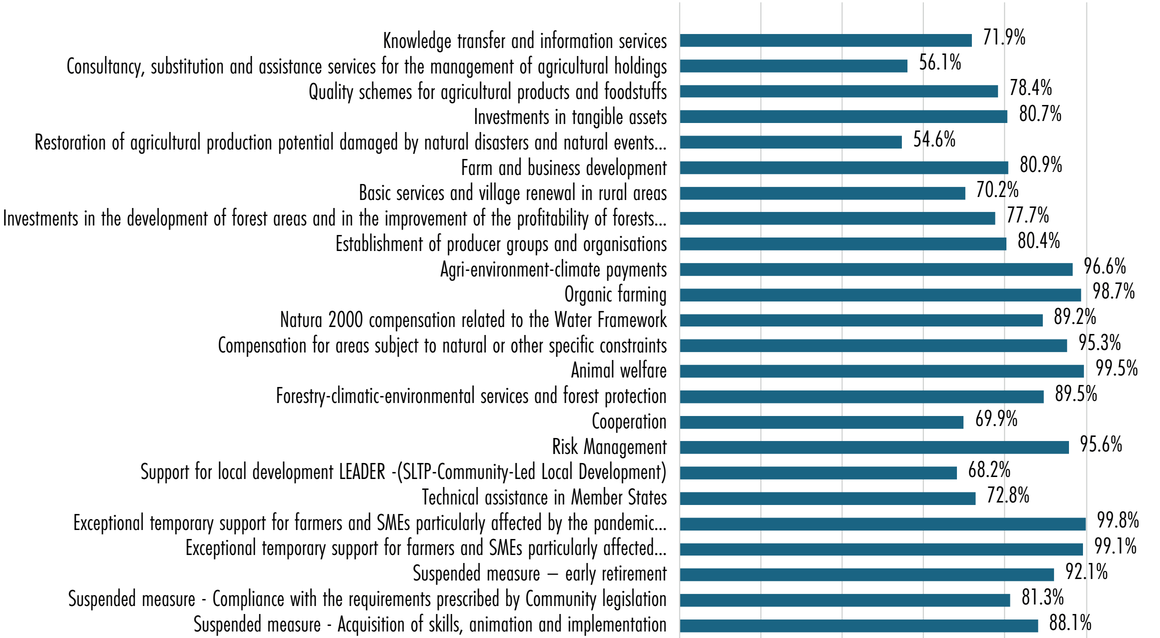
Rural development programming in Italy, for the period 2014-2022, was able to count on a total financial endowment of over 27.9 billion euros of public spending, of which 14.3 billion came from the EAFRD Fund. As of 31 December 2024, the financial resources actually used to support interventions in the area amounted to a total of 23.8 billion euros, of which 12.1 billion came from the EU budget, with an absorption capacity by Italian RDPs of 85.6%.
With reference to the year 2024 alone, public contributions were disbursed for an amount of 2.6 billion euros of public spending, corresponding to more than 1.2 of the EAFRD share, which made it possible to achieve the annual expenditure target set in almost all 19 Regions and the two Italian Autonomous Provinces.
Of the 24 measures laid out in the Programmes, the largest part of public expenditure achieved in 2024 refers to interventions attributable to Measure 4 – Investments in tangible assets and Measure 13 Compensatory allowances, which saw an expenditure percentage of 39% and 10%, respectively, for an amount of over 1.2 billion euros. On the contrary, one year after the end of the 14-22 programme, the interventions that showed the greatest delays in expenditure were related to Measure 5 intended for the prevention and restoration of agricultural production potential, Measure 2 relating to advice and Measure 19 for participatory local development (Leader).

COMPREHENSIVE EXPENDITURE ON RURAL DEVELOPMENT PROGRAMMING 2014-2022
23.8 BILLION EUROS
ON 31 DICEMBER 2024

Public subsidies disbursed in 2024
€2.6 billion

of which 39%
Investments
In material assets

Percentage progress of Expenditure by Measure - RDP 2014-2022



Source: CREA calculations from MASAF data

Progress of public expenditure planning 2014-2022

	Programmed Public Expenditure 14-22 million euros	Public expenditure incurred in 2024 million euros	Public expenditure at 31/12/2024 million euros	Spending progress %
	a	b	c	c/a
Abruzzo	638.68	76.91	527.53	82.60
Basilicata	889.81	75.77	702.06	78.90
Bolzano	486.24	23.88	456.32	93.80
Calabria	1,452.50	126.06	1,204.61	82.90
Campania	2,373.94	219.62	2,000.32	84.30
Emilia-Romagna	1,583.14	153.17	1,364.81	86.20
Friuli Venezia Giulia	398.60	34.85	341.86	85.80
Lazio	1,105.23	105.25	964.76	87.30
Liguria	414.27	45.81	319.64	77.20
Lombardy	1,543.42	175.05	1,360.91	88.20
Marche	882.60	93.11	736.19	83.40
Molise	281.85	7.08	228.43	81.00
Piedmont	1,457.80	167.72	1,256.77	86.20
Apulia	**2,134.48**	**248.58**	**1,776.57**	**83.20**
Sardinia	1,729.29	80.82	1,442.60	83.40
Sicily	2,885.57	364.24	2,441.02	84.60
Tuscany	1,291.65	159.68	1,094.39	84.70
Trento	**400.16**	**30.36**	**333.88**	**83.40**
Umbria	1,195.33	148.29	1,033.85	86.50
Aosta Valley	182.25	8.29	164.29	90.10
Veneto	1,561.24	164.43	1,415.97	90.70
National Programme	**2,860.29**	**100.06**	**2,568.39**	**89.80**
Rural network	**130.04**	**8.35**	**120.05**	**92.30**
Total	**27,878.38**	**2,617.41**	**23,855.21**	**85.60**

Source: CREA calculations from MASAF data

Spending progress by type of rural development intervention 2023-2027 programming

Intervention	Planned Public Expenditure 23-27 million euros	Net expenditure disbursed as of 10/15/2024 million euros	Spending progress by type intervention (%)
SRA - Environmental Commitments	4,659.00	465.90	45.40
SRB - Indemnity for natural constraints	1,359.10	232.50	22.60
SRC - Specific constraint indemnity	31.30	0.80	0.10
SRD - Investments	4,339.80	5.40	0.50
SRE - Young and New Businesses	735.00	0.10	0.00
SRF - Risk Management	2,850.90	319.70	31.10
SRG - Cooperation	1,326.00	2.40	0.20
SRH - Knowledge and Information Exchange	229.20	-	0.00
Total rural development	**15,530.30**	**1,026.90**	**100.00**

Source: elaborazioni CREA su dati PSP e APR 2024

Considering the expenditure of the individual programmes, the largest part of the public expenditure achieved was attributable to the National Programme with over 2.5 billion euros out of the total achieved (23.8 billion), followed by the expenditure of the RDP Sicily (2.4 billion euros) and Campania (2.0 billion), which together accounted for around one third of the total public expenditure realized. Although with some differences, the administrations were therefore proceeding at a sustained pace in the disbursement of EU funds from the second pillar of the CAP, denoting a substantial administrative effort. Limited to the year 2024, in absolute value, it was Sicily, Puglia and Campania that made the greatest progress, while in relation to the regional programme it was Umbria, Tuscany and Sicily that presented the greatest administrative effort. Taking into account the overall progress of the Programmes, Bolzano, Veneto and Aosta Valley showed the best performance, all three of them above 90% of payments compared to the programme, while Liguria, Molise and Abruzzo were the Regions that would have to concentrate in 2025 on ensuring achievement of the expenditure target set for the closure of the 14-22 programme, considering that programming 23-27 was also in full implementation.

The 2023/2027 Rural Development Programming

Rural Development programming for the period 2023-2027 overall of the CAP Strategic Plan (PSP) had around

16 billion euros, of which over 3 billion managed by the National Managing Authority (MASAF) for interventions related to Risk Management and the CAP Network.
Regional management, through the Regional Programming Complements (RPC), contemplated around 13 billion euros of public expenditure for a total of 91 interventions programmed in the NSP.
Therefore, each regional MA allocated resources to a variable number of interventions based on the needs and priorities expressed by the territories.
Pursuant to Article 69 of Regulation (EU) 2021/2115, Rural Development provided for the programming of 8 types of intervention: payments for environmental, climate and other management commitments (SRA); payments for natural constraints or other specific regional constraints (SRB); Payments for specific regional disadvantages due to certain mandatory requirements (SRC); investments (SRD); setting up young farmers and starting rural businesses (SRE); risk management tools (SRF); cooperation (SRG); Knowledge and Information Exchange (SRH).
The implementation data deriving from the Annual Report on the Implementation Effectiveness of the NSP for the financial year 2024, referring to payments made as of 15/10/2024, showed that expenditure for surface and per head interventions (SRA and SRB) represented more than 68% of the total disbursed, while the value of expenditure for risk management interventions (with particular reference to subsidized insurance) reached 31% of the total. The two groups of interventions mentioned above thus represented 99% of the expenditure made in the financial year 2024.
The data show an increase in spending of around 8%, in line with the European average, but above all the exceptional level of resources (over 3.6 billion in expenditure in 2024 alone between programming 14-22 and programming 23-27) and the administrative load that the various Managing Authorities were handling. In fact, if we consider that on average the 14-22 programming had an average annual expenditure of around 2.3 billion euros, the 3.6 billion spent during 2024 underline the strong commitment of the Administrations involved (Regions, Autonomous Provinces and Paying Bodies).
Meanwhile, the territories had to be able to absorb the projects financed through the NRRP that accumulated an amount of public resources that exceeded 6.5 billion euros, to which were added a further 1.2 billion relating to projects under the National Programme complementary to the NRRP.

Spending progress of RPCs 2023-2027

	Planned Public Expenditure 23-27 million euros	Public expenditure incurred as at 31/12/24 million euros	Progress %
Abruzzo	339.20	37.56	11.07
Basilicata	435.48	27.07	6.22
Bolzano	268.97	51.83	19.27
Calabria	751.18	94.91	12.63
Campania	1,113.33	125.18	11.24
Emilia-Romagna	994.71	71.13	7.15
Friuli Venezia Giulia	218.74	19.09	8.73
Lazio	579.69	32.21	5.56
Liguria	198.49	7.01	3.53
Lombardy	817.70	43.04	5.26
Marche	382.88	0.65	0.17
Molise	151.23	21.70	14.35
Piedmont	726.26	47.53	6.54
Apulia	1,139.29	20.96	1.84
Sardinia	810.04	119.22	14.72
Sicily	1,431.67	125.71	8.78
Tuscany	735.75	95.90	13.03
Trento	191.34	8.67	4.53
Umbria	498.76	33.43	6.70
Aosta Valley	90.29	12.31	13.63
Veneto	800.33	60.54	7.56
Total	**12,675.30**	**1,055.62**	**8.33**

Source: CREA calculations from MASAF data

REGIONAL EXPENDITURE

An analysis of expenditure data relating to regional budgets identified, for 2023, a total amount of payments for the agricultural sector slightly up compared to 2022 and amounting to just over 2.6 billion euros. In recent years, the Regions confirmed themselves as protagonists in governance of the territory and in the development of agri-food policies, contributing to making implementation of national and European guidelines more effective and coherent.
Among the regions with the highest percentage incidence of payments to the sector on regional value added were Friuli-Venezia Giulia (39.7%), Aosta Valley (38.2%), Sardinia (21.1%) and Calabria (11.4%).

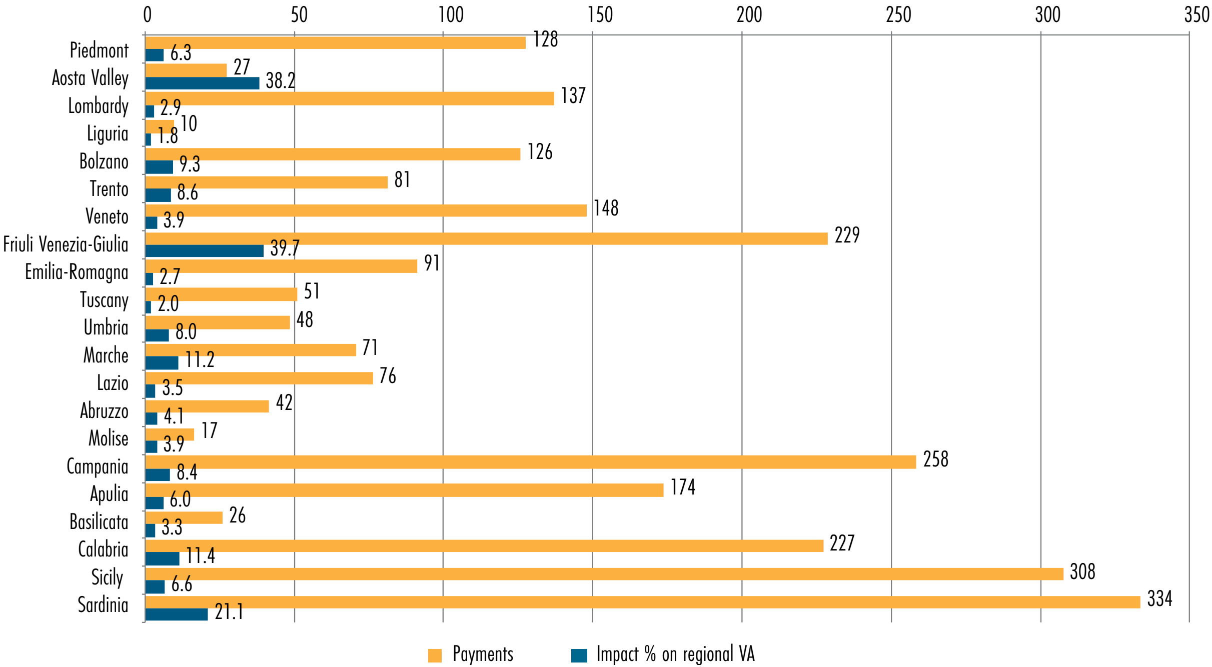
INTERVENTIONS REGIONAL IN FAVOUR OF SECTOR AGRICULTURAL

IMPACT OF PAYMENTS FOR THE AGRICULTURAL SECTOR/ TOTAL PAYMENTS FROM REGIONAL BUDGETS

1.30% ON AVERAGE

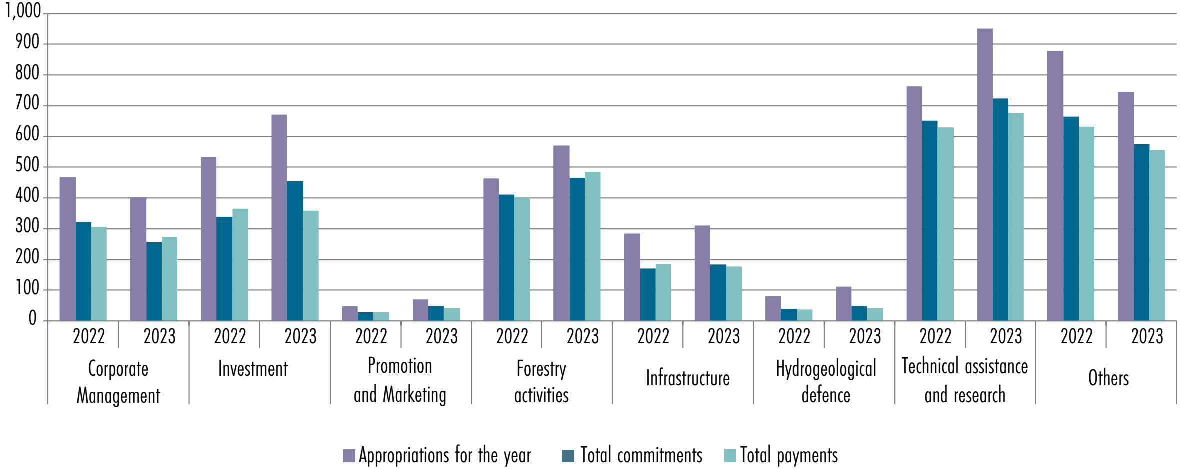
25.9%	Technical assistance and research **676 million euros**
18.5%	Forestry activities **485 million euros**
13.7%	Business investments **359 million euros**

Payments to the agricultural sector (million euros) and % impact on regional agricultural value added, 2023



Source: CREA calculations from MASAF data

Agricultural financing by economic-functional destination, 2022-2023



Source: CREA Research Centre for Policies and Bioeconomy

2025 Budget Law for Agriculture

The Budget Law for 2025 (Law no. 207/2024) consolidated a framework of interventions aimed at strengthening the national agricultural, livestock and forestry systems, paying particular attention to supporting investments in the South, promoting research in the agri-food sector and developing rural and pre-Alpine areas. The provisions contained in Articles 81, 82 and 83 of the measure, supplemented by the additional sectoral measures provided for in the manoeuvre, laid out an organic set of policies oriented towards competitiveness, sustainability and territorial cohesion.

Tax credit for investments in the South and implementation simplifications

In keeping with the discipline introduced by Law no. 208 of 2015 and subsequently extended, the 2025 Budget Law provided for completion of the procedures relating to tax credit for investments in the South for the period 2018-2022. At the same time, the budget extended the scope of the tax credit for investments in the **Single Special Economic Zone (Single SEZ)** also to the primary production, fisheries and aquaculture sectors for the year 2025, with an endowment of 50 million euros for investments made by 15 November of the same year.

Research, innovation and digitization in agriculture and animal husbandry

A second intervention axis concerned the strengthening **of scientific research in the agricultural and livestock sectors**. Financing in favour of the **Council for Agricultural Research and Analysis of Agricultural Economics (CREA)** was confirmed, to which a contribution of 3 million euros was attributed for each of the years 2025, 2026 and 2027, aimed at the continuation of the testing activities based on **genome editing**, site-directed mutagenesis and cisgenesis techniques, conducted exclusively for scientific purposes. At the same time, a similar expenditure was authorized for each year of the three-year period 2025-2027 intended for continuation of the **LEO Project – Livestock Environment Opendata**, aimed at creating a single and digital database of the national livestock heritage (BDUZ).

The budget law also expanded the Fund's aims to support research activities, including initiatives aimed at promoting the **competitiveness of Italian agriculture through mechatronics, digitization and modelling of agri-food systems**. In addition to this, a contribution of 6 million euros per year was envisaged for the operation of CREA, to guarantee the operational continuity of the institution and the strengthening of research infrastructures. For food security and wellbeing, the manoeuvre allocated additional resources for campaigns to **prevent nutrition and eating disorders** (500,000 euros for each year of the period 2025-2027) and provided for the creation, at the Ministry of Labour and Social Policies, of a Fund for the fight against food poverty at school, with the aim of supporting families with difficulty in paying school canteens.

Territory, rural areas and protection of production

The provisions of Article 83 intervened on legislation relating to the determination of **pre-Alpine areas, foothills and non-irrigated plains**, updating the criteria for territorial classification and simplifying ministerial remits.

The 2025 Budget Law further strengthened the policy **of support for the primary sector and rural communities**, providing for a refinancing of the **National Solidarity Fund** for insurance incentives (+15 million euros for 2025), as well as the disbursement of a non-repayable contribution of **10 million euros to livestock farms** affected by the slaughter of animals due to Bluetongue disease. The three-year **National Fisheries and Aquaculture Programme, the Wildlife Recovery Fund** and measures in favour of workers in the fisheries sector were also strengthened, with the introduction of a daily allowance of up to 30 euros for periods of compulsory and non-compulsory closure. The chapter dedicated to **Water Security and Rural Infrastructure** was also significant: a total of 708 million euros being allocated for the **National Plan of Infrastructural Interventions and for Safety in the Water Sector (PNIISSI)**, as well as resources intended for the financing of works to improve the hydrographic networks and the design of hydraulic efficiency interventions.

Administrative simplification, credit and internationalization

A further intervention axis was represented by measures to support investments and access to credit. The "**Nuova Sabatini**" was refinanced with 400 million for 2025, 100 million for 2026 and 400 million per year from 2027 to 2029, for the benefit of micro-, small- and medium-sized enterprises, including in agriculture and fisheries, for the purchase of tangible and digital capital goods. At the same time, the **Revolving Fund for Support for Internationalization (Fund 394)** was strengthened, which would be able to allocate up to 200 million euros to subsidized loans for investments in Central and South America.

Summary table – Articles and summary contents

Section	Article / Size	Subject / Summary content	Amounts/Period
1. Tax credit and support for the South	Article 81	Tax credit for investments in the South; MASAF and Revenue Agency registration requirements; exclusion of recovery acts for debts compliant with EU law	Year 2018-2022
	Law 207/2024, paragraphs 541- 543	Completion of EU regulations and procedures for tax credits in the South	2018-2022
	Law 207/2024, paragraphs 544- 546	Extension of the tax credit to the single SEZ (including agriculture, fisheries, aquaculture)	€50 million - 2025
2. Research, innovation and digitalisation	Article 82 , paragraph 1	Contribution to CREA for research on genome editing, mutagenesis and cisgenesis for scientific purposes	3 mln €/year - 2025-2027
	Article 82 , paragraph 2	Funding of the LEO Project – Livestock Environment Opendata, for digitization of livestock data and BDUZ operations	3 mln €/year - 2025-2027
	Article 82 , paragraph 3	Extension of the Research Fund: development of agricultural mechatronics and agri-food modelling	CREA Ordinary Resources
	Law 207/2024, paragraphs 547-550	General refinancing of CREA and digital and agri-food research programmes	6 mln €/year - 2025-2027
	School food poverty fund	Interventions in support of school canteens for families in difficulty	€0.5 million/year 2025-2026; 1 mln €/year from 2027
	Nutrition and health campaigns	Nutrition Disorder Prevention Programmes	0.5 mln €/year - 2025-2027

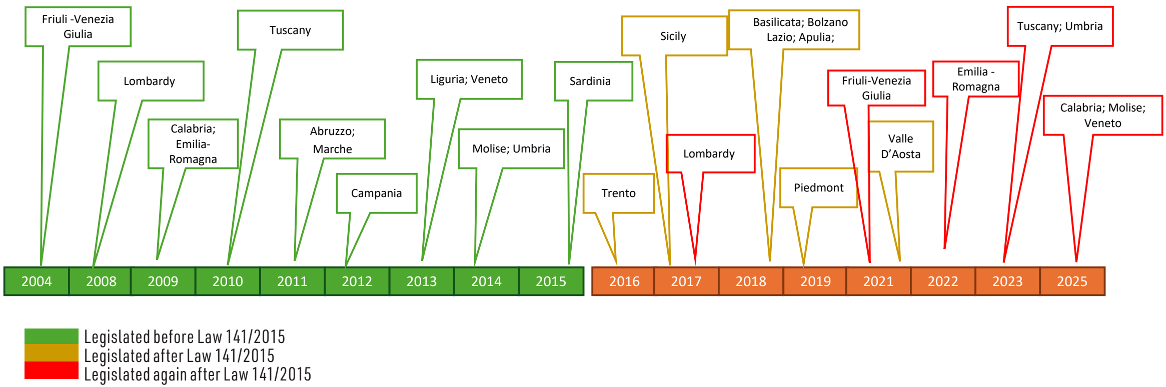
>>>cont.

<<<<cont.

Section	Article / Size	Subject / Summary content	Amounts/Period
3. Territory, rural areas and protection of production	Article 83	Redefinition of pre-Alpine areas, foothills and nonirrigated plains; MASAF competence; territorial limits for derogations on agricultural land	MASAF Implementing Rules (2025)
	National Solidarity Fund	Increase for agricultural insurance incentives and risk management	+€15 million - 2025
	"Bluetongue" contribution	Compensation to livestock companies for the slaughter infected animals	€10 million - 2025
	PNIISSI - National Infrastructure Plan water	Safety interventions and modernization of water networks agricultural	€708 million in total (2025-2030)
	Revaluation of agricultural land and buildable	Annual redetermination of the purchase value by tax Replacement	Deadline 30 November of each year
4. Access to credit, internationalisation and simplification	"Nuova Sabatini"	Subsidized loans for investments in capital goods of agricultural and manufacturing MSMEs	€400 million (2025); 100 mln € (2026); 400 mln €/year (2027-2029)
	Fund 394 - internationalization	Financing for projects in Central and South America	€200 million (overall limit)
	Post-disaster and earthquake support	Extensions on mortgages and loans for affected farms	Measures 2025
	Milk quota body	Structure for the reconciliation of historical debts in the dairy sector	MASAF Establishment (2025)

Social Farming (SF) is a set of activities carried out at a farm and aimed at disadvantaged individuals for the realization of social, health or educational benefits. Over the past two decades the Regions and Autonomous Provinces have taken steps to regulate this matter, sometimes with specific rules. For the past ten years, National Law no. 141 of 2015, "Provisions on agricultural and agricultural social culture" placed SF within the more general framework of the multifunctionality of agricultural enterprises, defining it as a set of "activities carried out by agricultural entrepreneurs referred to in Article 2135 of the Civil Code, individually or

Regulatory framework



Source: CREA calculations based on regional databanks in association, and by social cooperatives". All the Regions and Autonomous Provinces have legislated over the last decade on social farming: thirteen regions have approved their own laws on the subject before the entry into force of the national law, while nine legislated subsequently. Of the first group of thirteen regions, eight legislated again after Law no. 141/2015, thus aligning their legislation with the national one.

Law 141/2015, in addition to defining the activities of SF that aim to promote social and work inclusion, improve people's wellbeing and support the development of local communities, also identifies the subjects who can carry them out. The rule, in fact, has restricted the number of subjects entitled to carry out SF activities, both with respect to some of the previously approved regional regulations, and as regards the experiments carried out

Number of SF operators in Italy, September 2025

Source: CREA calculations based on regional databanks in different local contexts. The regions announced the requirements and procedures for the recognition of operators in measures of various kinds: guidelines, regulations, circulars, implementing provisions, decrees, etc. Despite the fact that all Italian regions arranged for the establishment of lists, registers, or regional registers of social farms in which to register the farms carrying out social farming activities, only fifteen established a regional list of social farms.

According to these regional lists, there were a total of 498 SF operators with interdisciplinary skills that combined agricultural knowledge with social and therapeutic skills. In recent years, there has been an increase in the number of entities who have acquired the requirements to carry out SF activities, which on the national territory mainly concern social and work integration through rehabilitation and social support projects: +54% compared to 2020 and +63% compared to 2019. Over the last five years, the number of regions that have established regional lists has increased from nine to fifteen, with the addition of Piedmont, Aosta Valley, Apulia, the autonomous province of Trento, Sicily, and Emilia-Romagna.

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15	Lithuania (€)
16	Luxembourg (€)
17	Malta (€)
18	Netherlands (€)
19	Poland
20	Portugal (€)
21	Czechia
22	Romania
23	Slovakia (€)
24	Slovenia (€)
25	Spain (€)
26	Sweden
27	Hungary

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